

VISITOR SATISFACTION STUDY QUARTER 2, 2025

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, 2025 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	2,786	1.86	6.36%
U.S. East	1,954	2.22	6.68%
Japan	338	5.33	14.76%
Canada	300	5.66	11.75%
Oceania	184	7.22	11.17%
China	52	13.59	6.75%
Korea	281	5.85	47.87%
Europe	307	5.59	9.83%
All visitor markets	6,202	1.24	7.38%

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, 2025. The VSAT weighting system was developed to adjust for disproportionate sampling across all visitor markets.

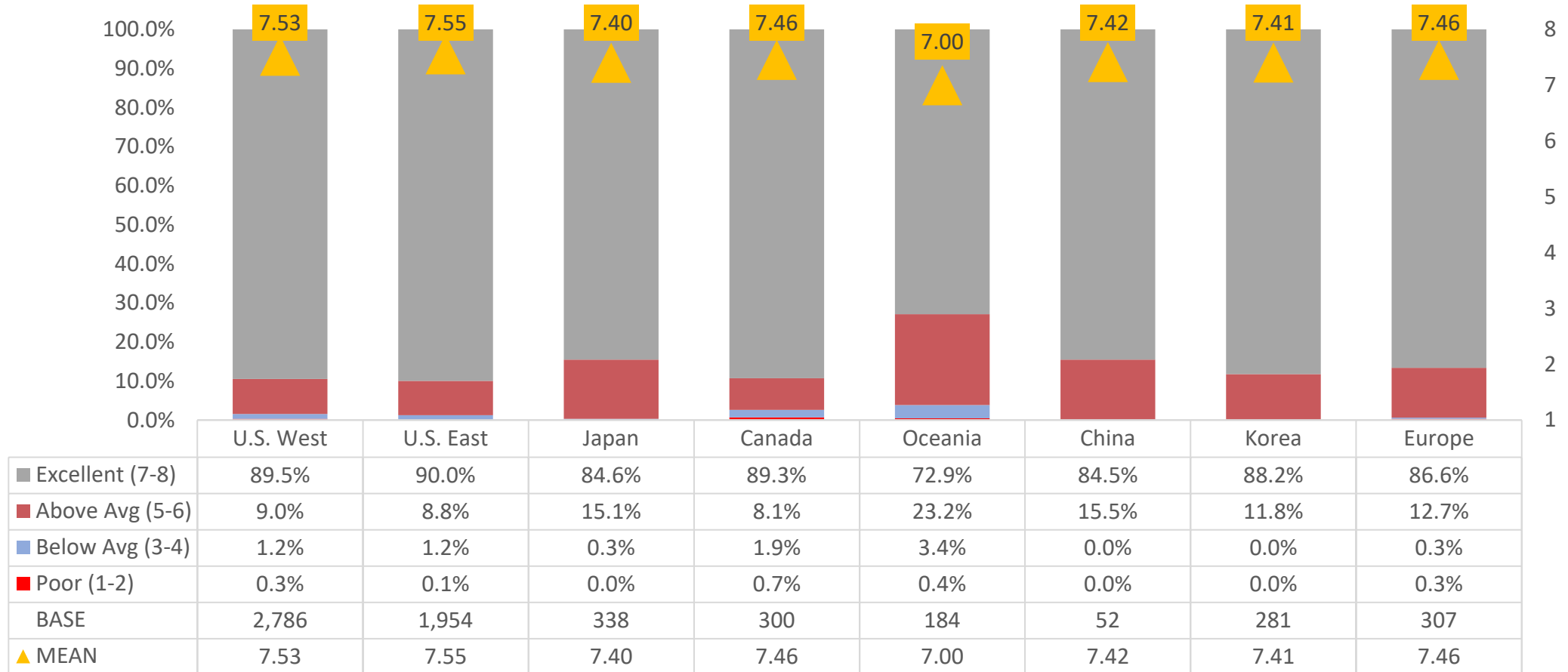
Data for 2025 is preliminary. Data for all other prior years reflect final visitor statistics from DBEDT Annual Visitor Satisfaction and Activity reports.

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

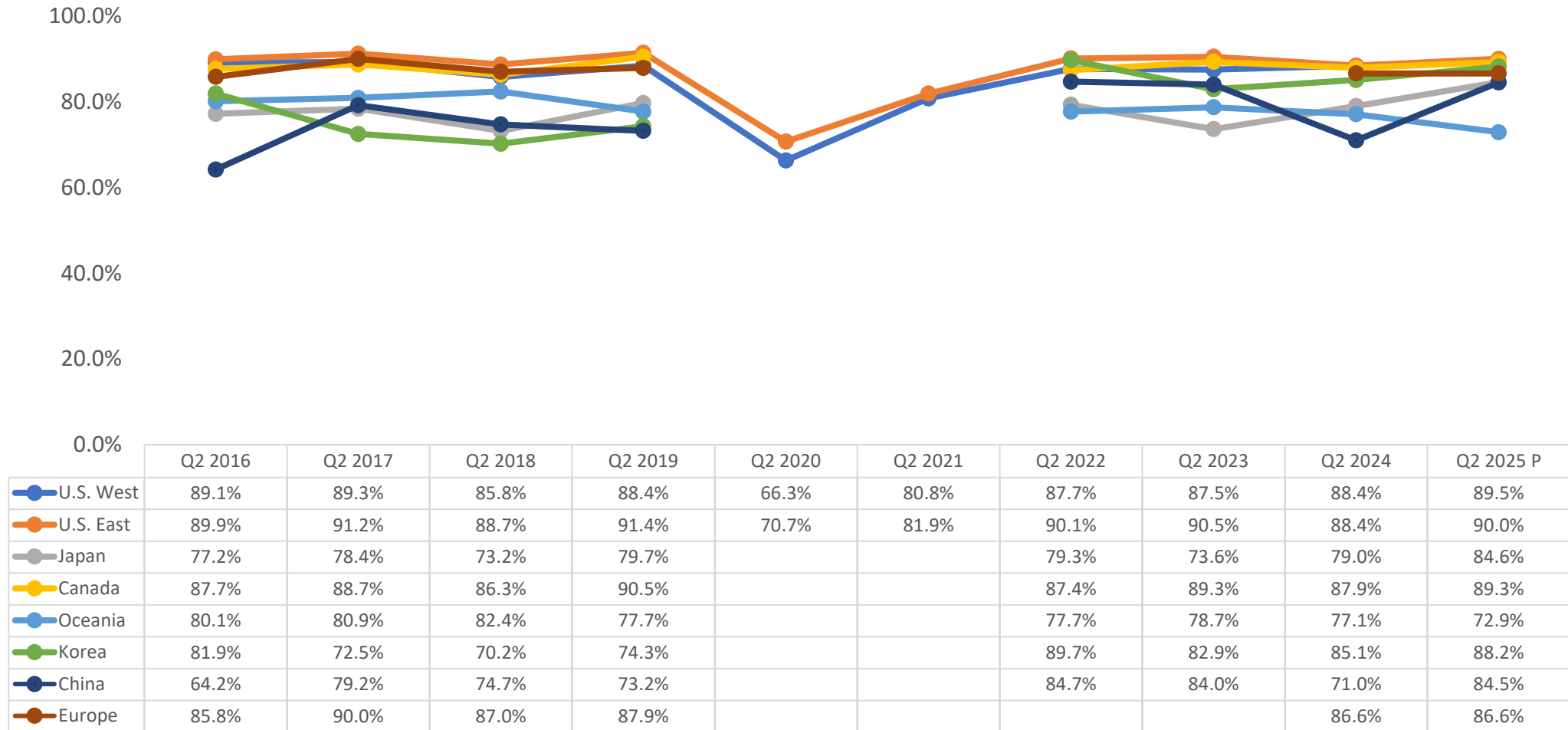


SATISFACTION – STATE OF HAWAI‘I BY VISITOR MARKET

- **Gender:** Female respondents from **U.S. West** gave higher satisfaction scores than male respondents from this visitor market.
- **Islands visited:** Visitors from **U.S. East** whose trip included stays on multiple islands were more satisfied with their trip overall compared to those whose trip was limited to a single island.
- **Age:** Satisfaction was highest among younger (18-34 years old) visitors from **Japan**.
- **Trips to Hawai‘i:** First-time visitors from **Japan** gave higher satisfaction scores than repeat visitors from this market.
- **Travel party size:** Visitors from **Japan** traveling in pairs gave higher satisfaction scores than those traveling alone.

SATISFACTION – STATE OF HAWAI‘I BY VISITOR MARKET

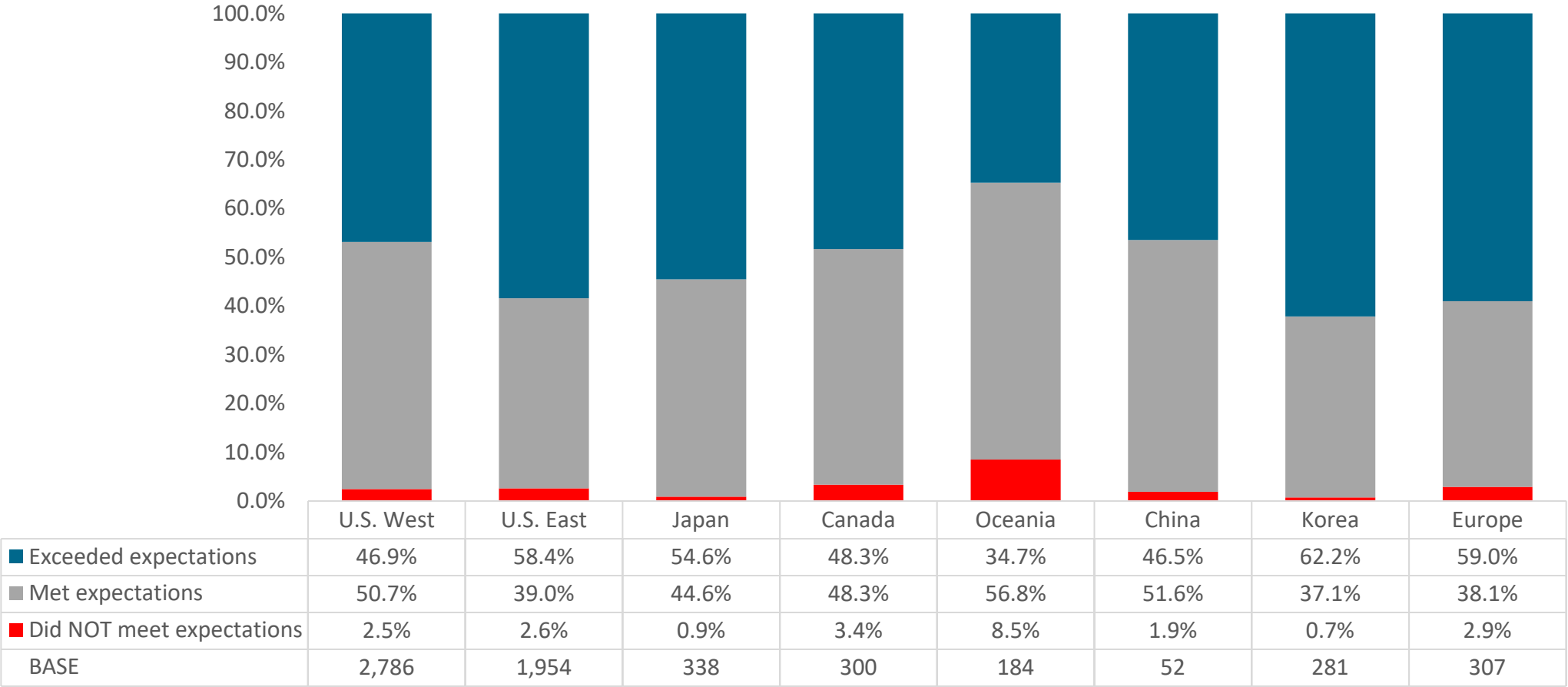
Tracking Data – Rating of “Excellent” (7-8)



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___?

SATISFACTION - HAWAI'I TRIP EXPECTATIONS

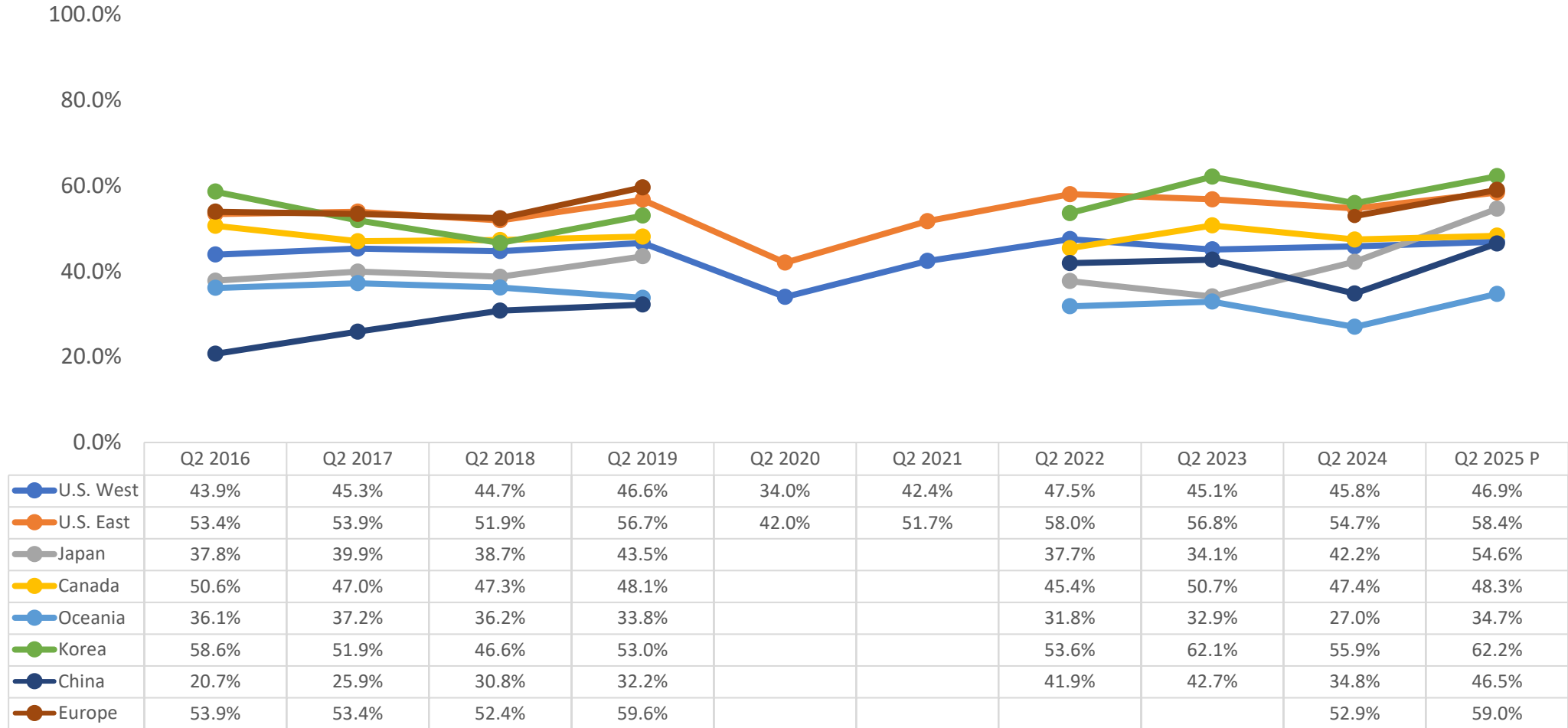


SATISFACTION – HAWAI‘I TRIP EXPECTATIONS

- ***Trips to Hawai‘i:*** First-time visitors from the following visitor markets were more likely to feel their trip exceeded their expectations than repeat visitors: **U.S. West, U.S. East, Oceania, Canada and Japan.**
- ***Age:*** Younger respondents from **U.S. West** (18 – 49 years old), **U.S. East** (18 – 34 years old), **Canada** (18 – 34 years old) and **Japan** (18 – 49 years old) were more likely to respond that their trip exceeded expectations compared to visitors from these markets in older age groups.
- ***Gender:*** Female visitors from **U.S. West, U.S. East** and **Japan** gave higher mean satisfaction scores compared to male visitors from these markets.
- ***Travel party:*** Those in larger travel parties of three or more from **U.S. West** were more satisfied with their trip than those traveling here by themselves or in pairs. Visitors from **Japan** traveling in pairs were the most likely to feel their trip exceeded their prior expectations.
- ***Islands visited:*** Visitors from **U.S. East** whose trip included stays on multiple islands were more likely to feel their visit exceeded their expectations compared to those whose trip was limited to a single island.

SATISFACTION - HAWAI'I TRIP EXPECTATIONS

Tracking Data – Rating of “Exceeded expectations”

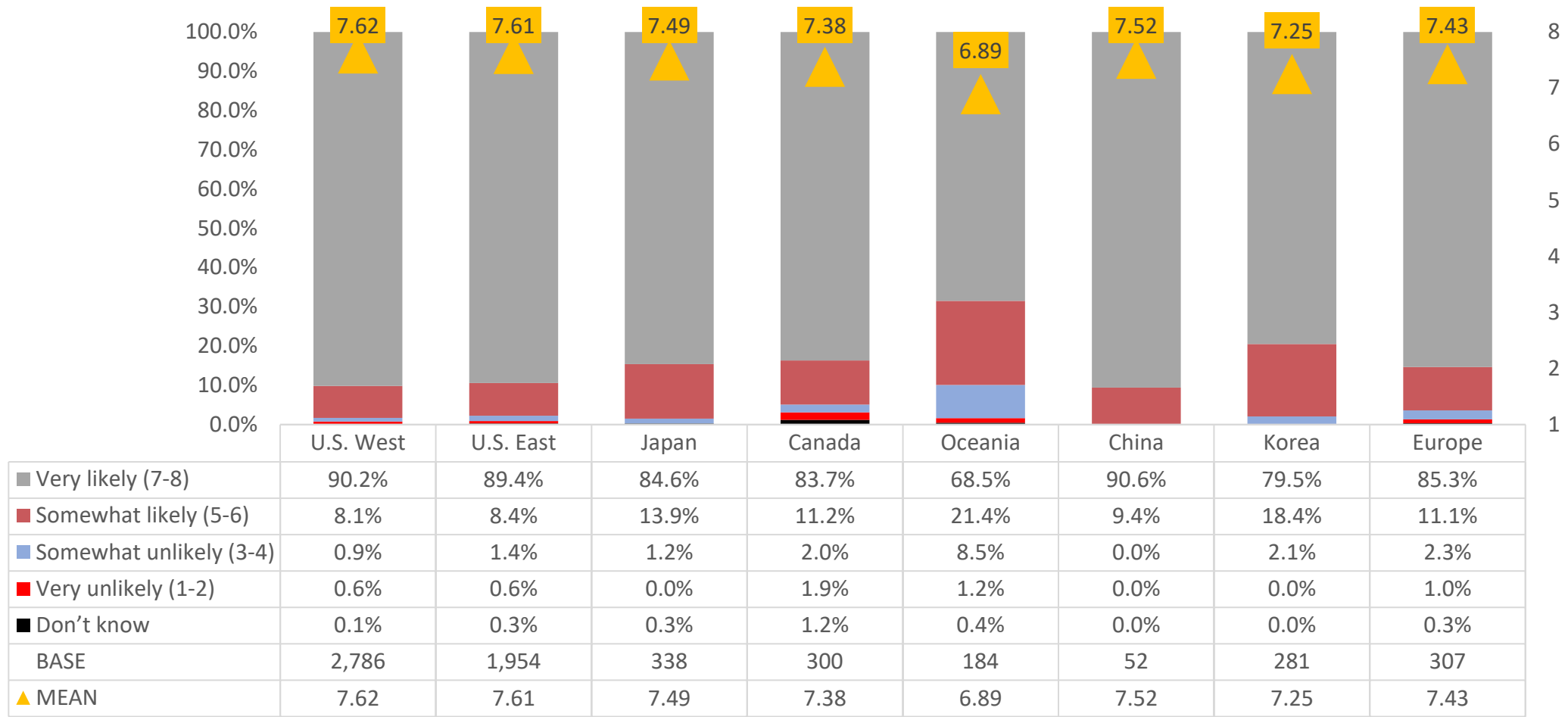


P= Preliminary Data

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

BRAND/ DESTINATION - ADVOCACY

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

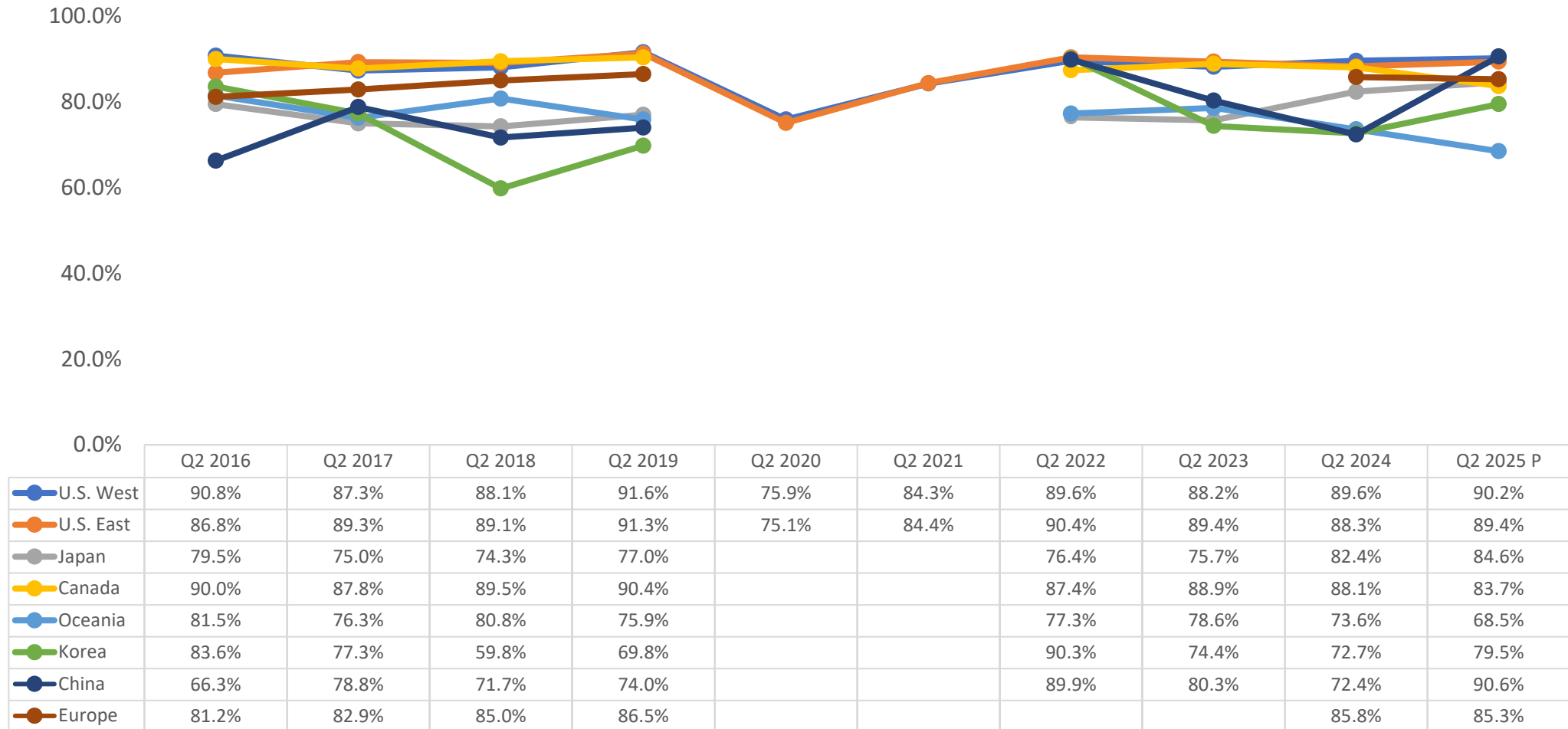


BRAND/ DESTINATION – ADVOCACY

- **Gender:** Female visitors from **U.S. West** and **Japan** were more likely to recommend the state to others than male visitors from these visitor markets.
- **Trips to Hawai'i:** Brand advocacy scores were higher among repeat visitors from **U.S. West** and **U.S. East** compared to first-time visitors from these markets.
- **Travel party size:** Visitors from **U.S. West** traveling in parties of 2+ persons were more likely to recommend the state than those traveling alone.
- **Age:** Younger visitors from **Japan** (18-34 years old) were more likely to recommend the state compared to older travelers from this market.

BRAND/ DESTINATION - ADVOCACY

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



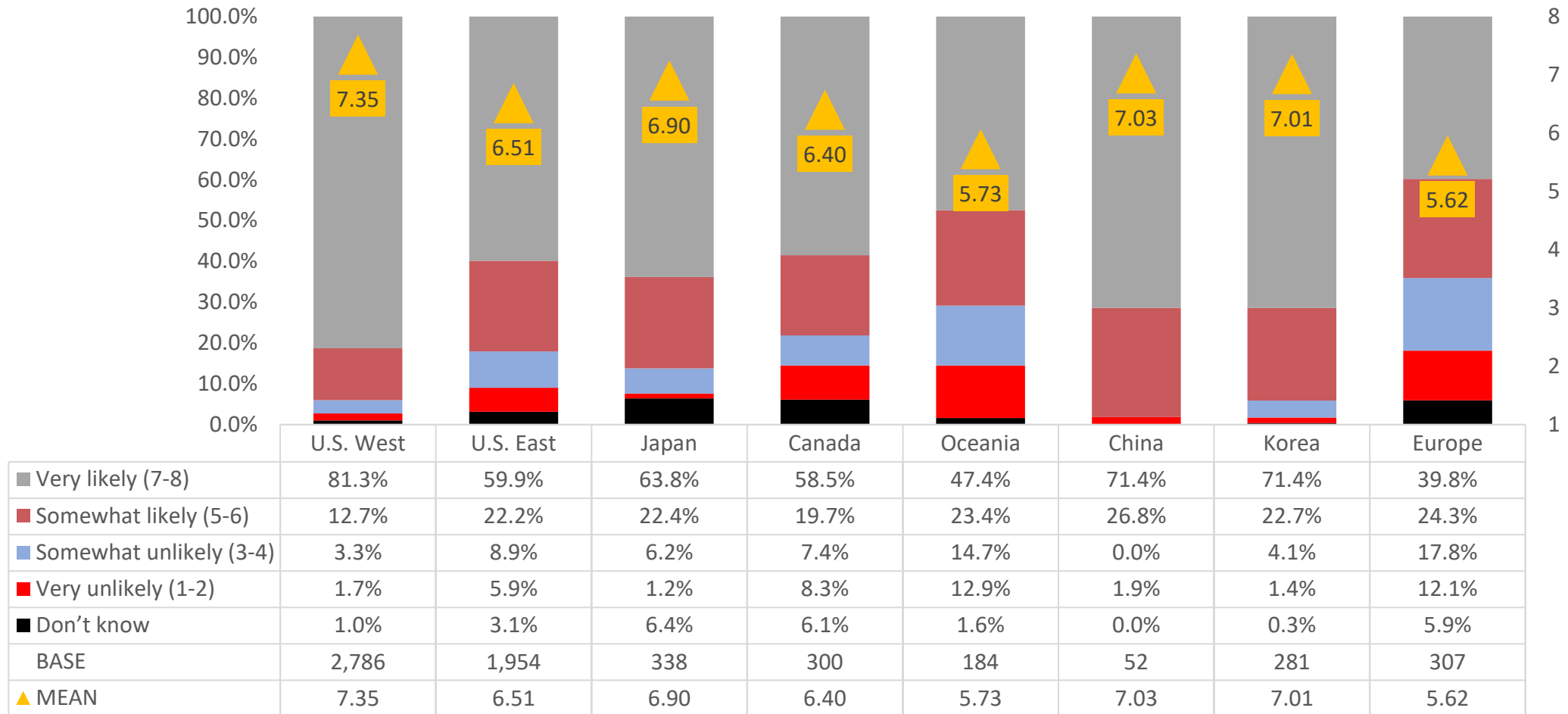
P= Preliminary Data

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. For Europe, the pandemic resulted in too few travelers in the second half of 2020. Visitors from Europe were not surveyed in 2021 through 2023.

LIKELIHOOD OF RETURN VISIT

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

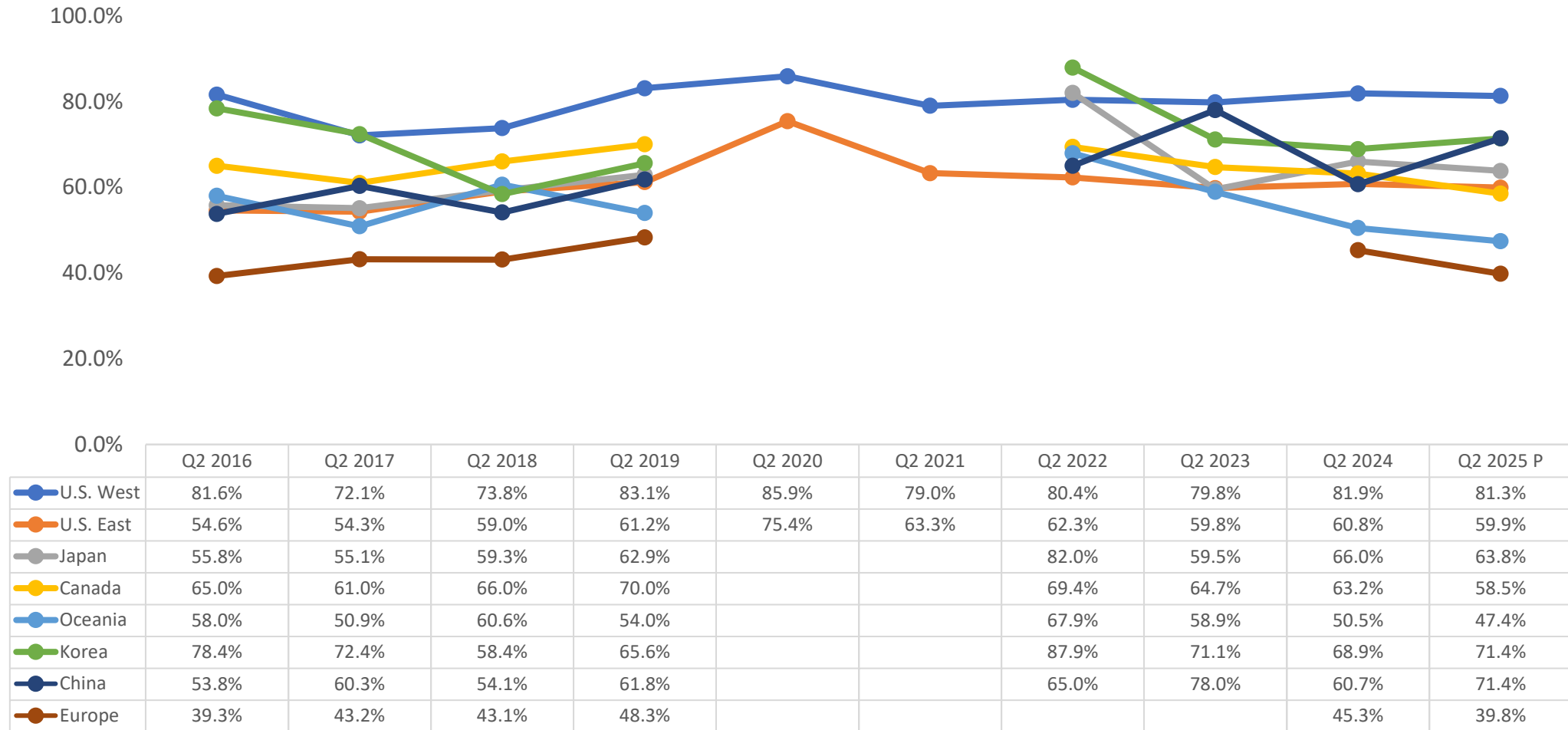


LIKELIHOOD OF RETURN VISIT

- ***Trips to Hawai'i:*** Repeat visitors from the following visitor markets expressed a greater likelihood of returning to the state in the next five years than first-time visitors: **U.S. West, U.S. East, Oceania, Canada and Japan.**
- ***Age:*** Younger visitors under 35 from **U.S. West** were the least likely to anticipate a return to the state in the next five years compared to older visitors from this market.
- ***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.
- ***Travel party size:*** Those visitors from **U.S. West** who traveled to the state by themselves expressed a higher likelihood of returning in the next five years than those who traveled here with at least one other person.
- ***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 in the next five years than less affluent travelers from this market.

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. For Europe, the pandemic resulted in too few travelers in the second half of 2020. Visitors from Europe were not surveyed in 2021 through 2023.

UNLIKELY TO RETURN - TOP REASONS U.S. WEST

Top Responses 10%+

Q2 2024	Q2 2025 P
63.6% Too expensive 30.7% Poor value 29.6% Want to go someplace new 18.2% Five years is too soon 18.2% Too crowded/ congested/ traffic 18.2% No compelling reason to return 17.1% Too commercialized/ overdeveloped 14.8% Flight too long 11.4% Unfriendly people/ felt unwelcome	33.8% High cost of travel 27.7% Preference for other destinations

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS U.S. EAST

Top Responses 10%+

Q2 2024	Q2 2025 P
54.5% Too expensive 39.5% Want to go someplace new 39.0% Flight too long 18.0% Poor value 16.6% Five years is too soon 16.3% Other financial obligations 14.2% Too crowded/ congested/ traffic 11.7% No compelling reason to return	46.6% High cost of travel 27.4% Preference for other destinations 23.7% Long travel distance

P= Preliminary Data

UNLIKELY TO RETURN – TOP REASONS JAPAN

Top Responses 10%+

Q2 2024*	Q2 2025** P
61.4% Too expensive 37.4% Five years is too soon 25.4% Want to go someplace new 21.3% Other financial obligations 13.5% Flight too long 11.1% Poor health/ age restriction	23.4% High cost of travel 12.8% Don't know 12.7% Preference for other destinations 10.6% Financial constraints

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

**Caution small base (n=47 respondents) in Q2 2025.

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS CANADA

Top Responses 10%+

Q2 2024	Q2 2025 P
59.4% Too expensive 42.6% Want to go someplace new 25.6% Flight too long 21.5% Five years is too soon 18.0% Poor value 17.3% Other financial obligations 11.0% No compelling reason to return	37.0% High cost of travel 28.9% Political climate concerns 22.1% Preference for other destinations 19.6% Long travel distance

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS OCEANIA

Top Responses 10%+

Q2 2024	Q2 2025* P
61.4% Too expensive 34.4% Want to go someplace new 33.5% Poor value 25.1% Too commercialized/ overdeveloped 19.1% No compelling reason to return 18.0% Too crowded/ congested/ traffic 13.3% Other financial obligations 11.3% Flight too long	43.2% High cost of travel 33.7% Preference for other destinations

*Caution small base (n=49 respondents) in Q2 2025.

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS KOREA

Top Responses 10%+

Q2 2024*	Q2 2025** P
78.7% Too expensive 34.1% Want to go someplace new 30.8% Poor value 25.6% Flight too long 18.1% Other financial obligations 13.8% Five years is too soon 13.8% Too commercialized/ overdeveloped 12.8% No compelling reason to return	52.6% High cost of travel 17.5% Personal preference

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

**Caution small base (n=17 respondents) in Q2 2025.

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS CHINA

Top Responses 10%+

Q2 2024*	Q2 2025** P
48.9% Too expensive 48.9% Poor value 30.2% Want to go someplace new 20.9% Flight too long 20.9% Five years is too soon 20.9% Too commercialized/ overdeveloped 20.9% No compelling reason to return 20.9% Unfriendly people/ felt unwelcome	100.0% High cost of travel

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

**Caution small base (n=1 respondents) in Q2 2025.

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS EUROPE

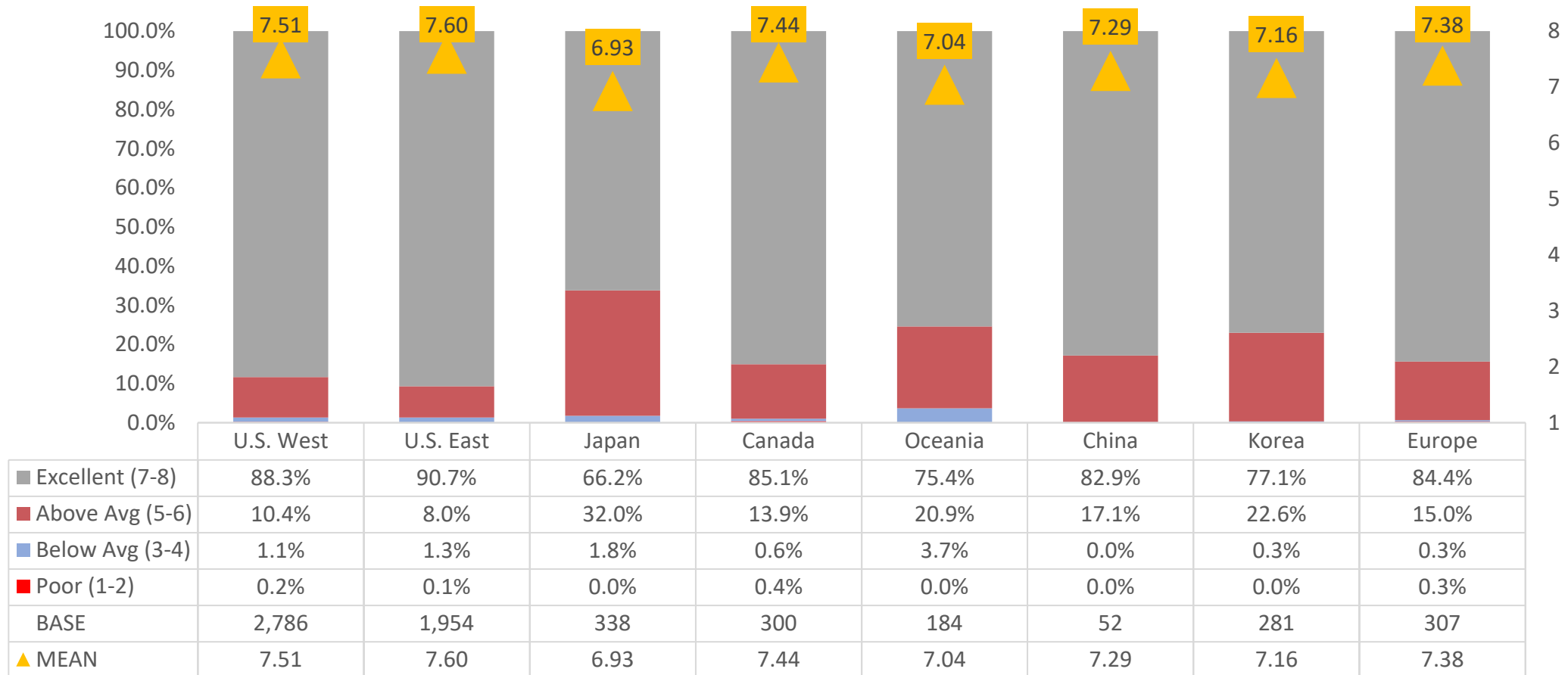
Top Responses 10%+

Q2 2024	Q2 2025 P
65.2% Flight too long 53.8% Too expensive 31.8% Want to go someplace new 22.6% Five years is too soon 16.4% Poor value 15.9% Other financial obligations 10.4% Too commercialized/ overdeveloped	52.2% Long travel distance 43.8% High cost of travel 14.9% Preference for other destinations

P= Preliminary Data

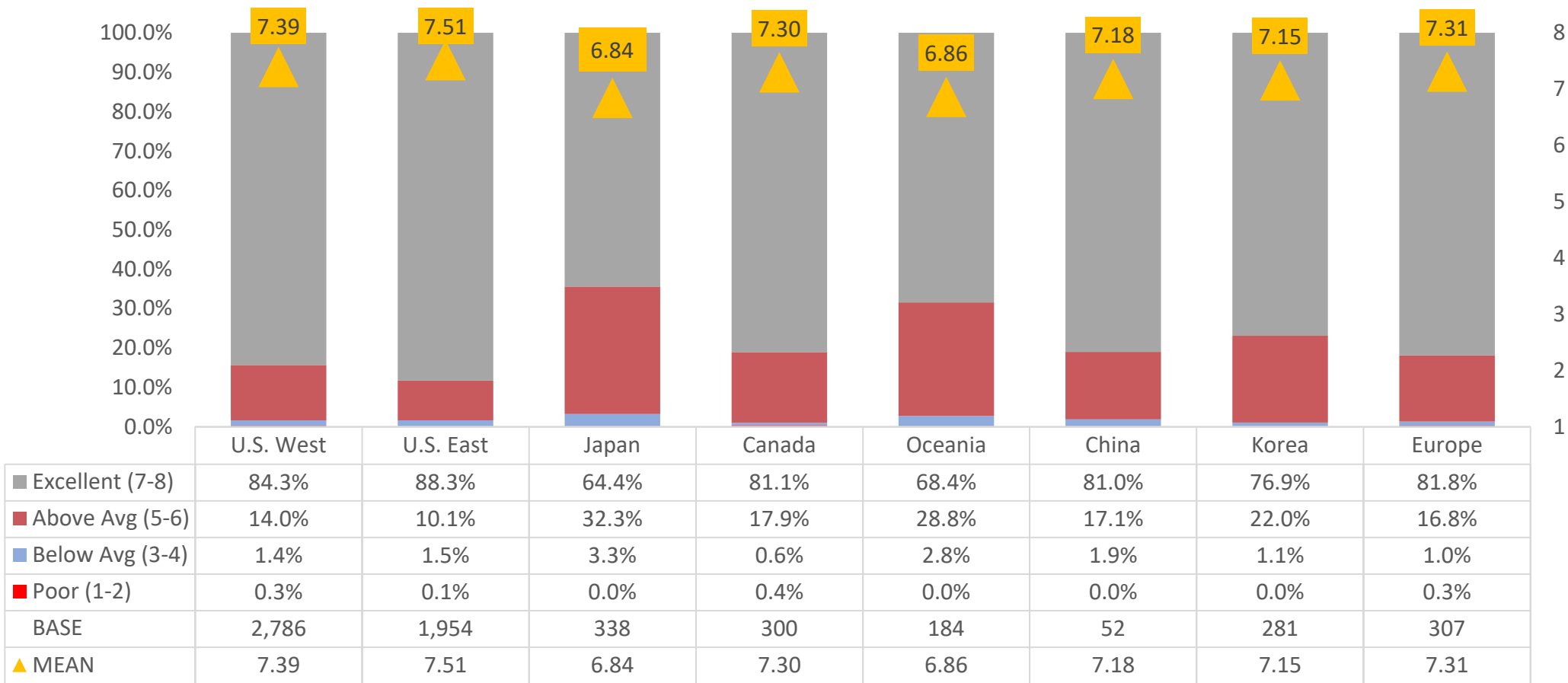
OFFERING A VARIETY OF EXPERIENCES

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



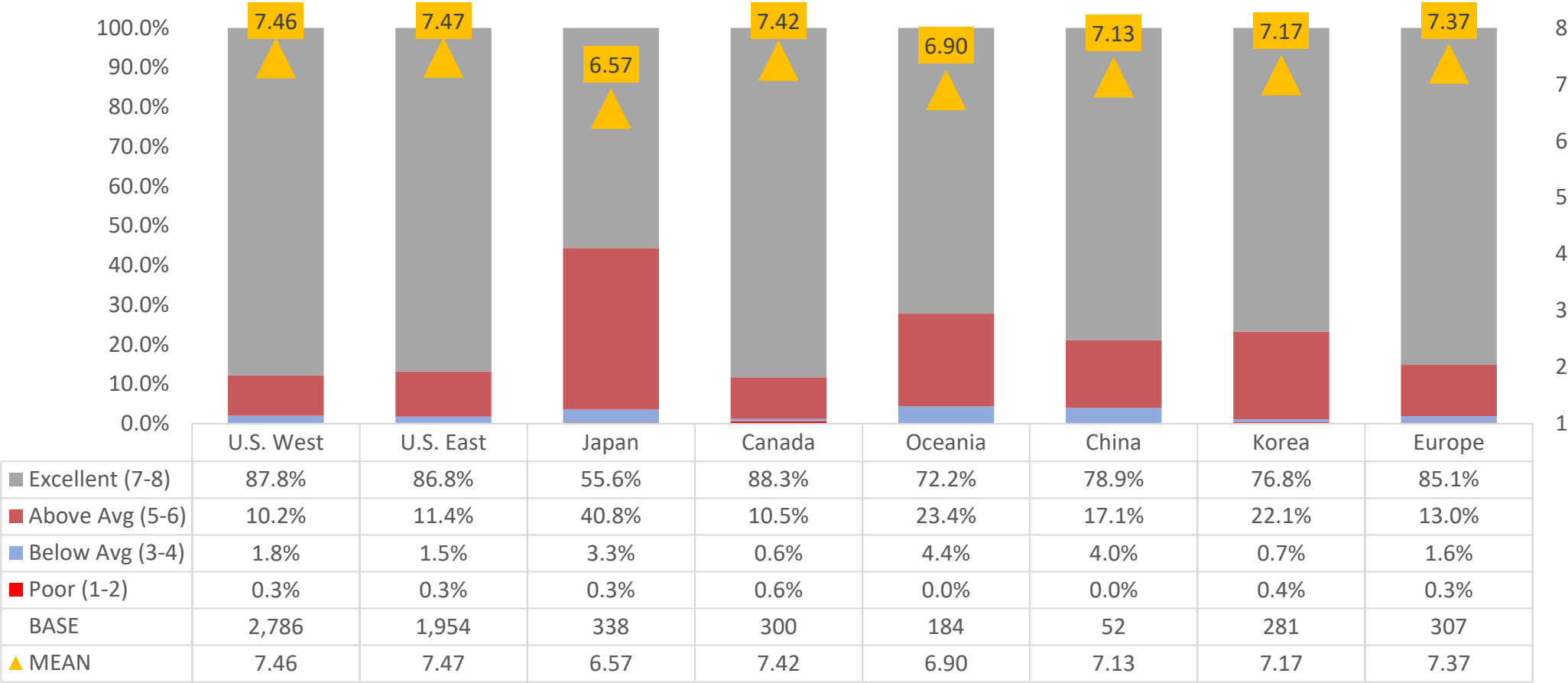
NUMBER OF DIFFERENT/ UNIQUE EXPERIENCES

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



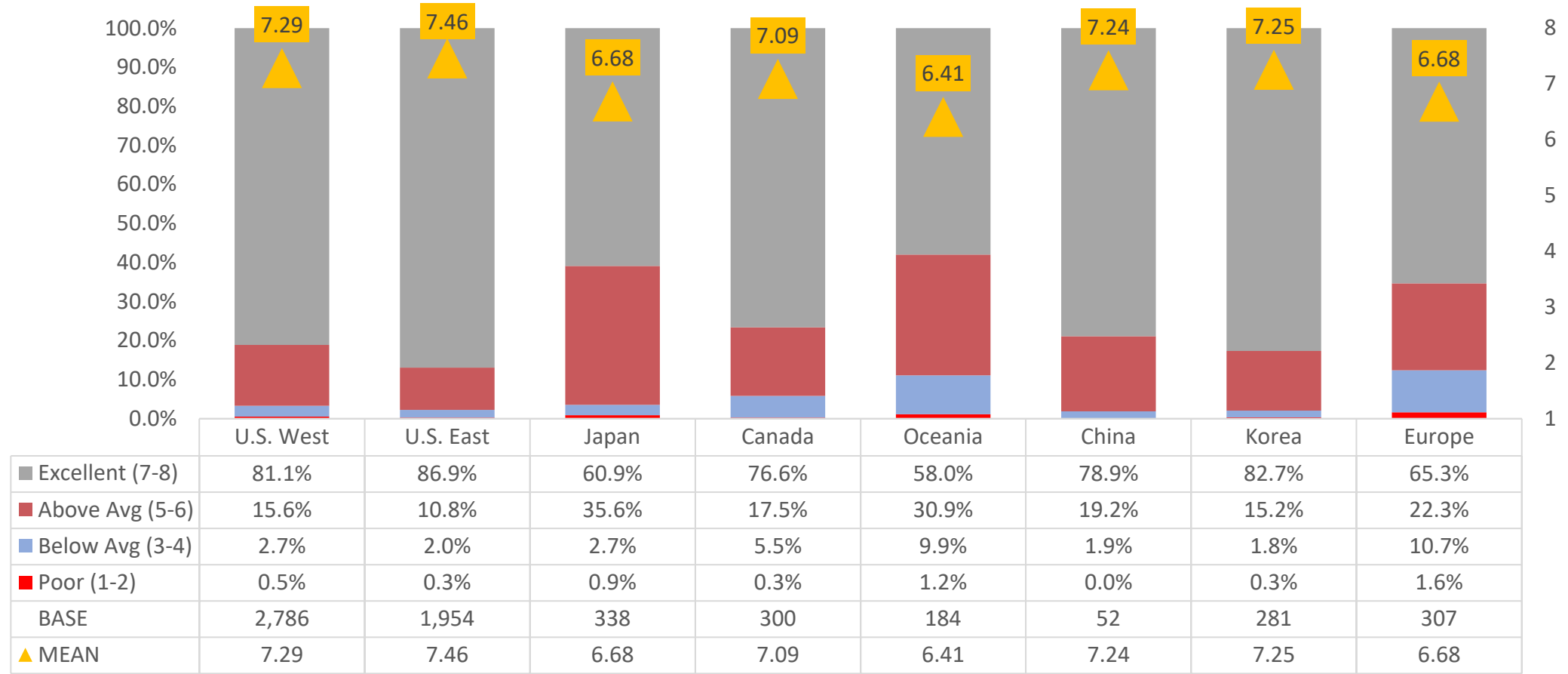
SAFE AND SECURE DESTINATION

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



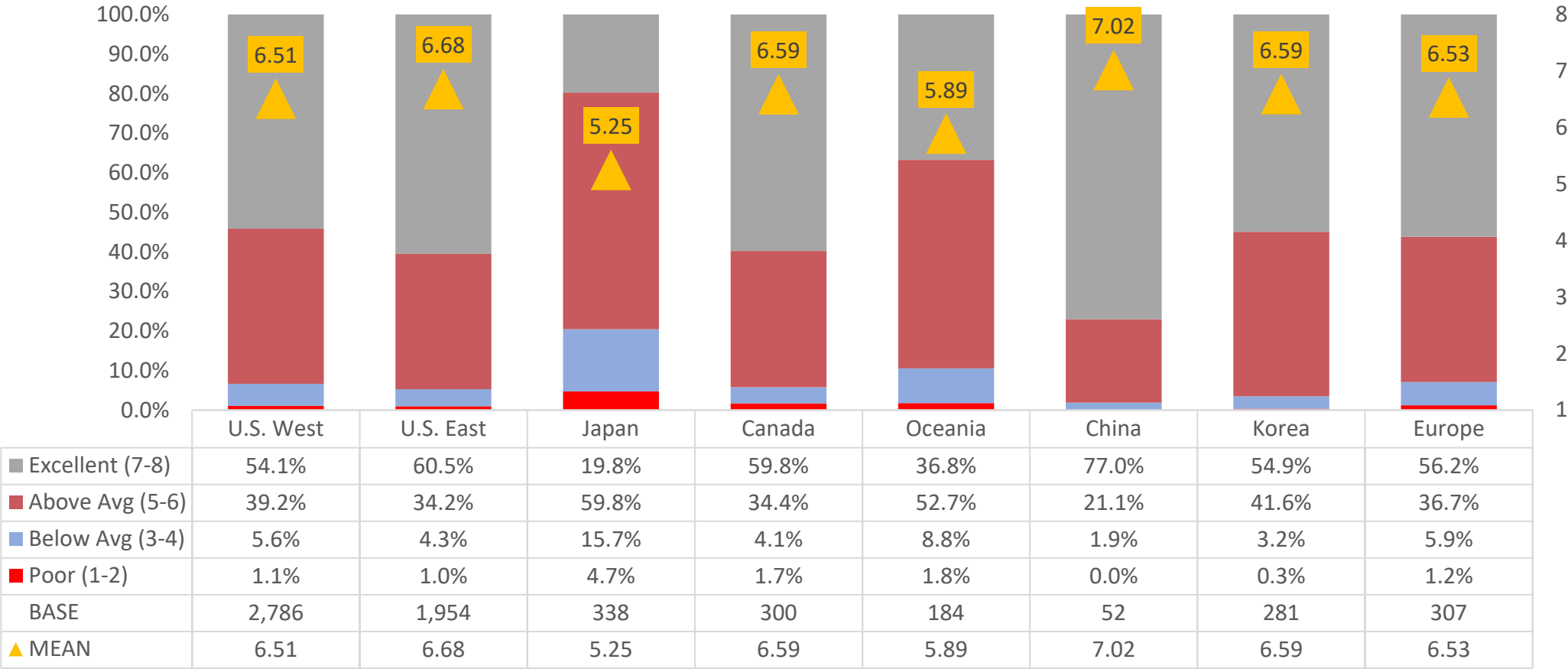
ENVIRONMENTALLY FRIENDLY/ SUSTAINABLE

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	China	Korea	Europe
TOTAL	97.9%	98.4%	98.2%	97.2%	91.8%	98.0%	99.0%	99.0%
On own (self-guided)/ driving around island	87.2%	85.7%	81.1%	81.7%	56.5%	63.8%	80.7%	77.7%
Helicopter ride/ airplane tour	2.2%	5.9%	1.5%	4.9%	2.5%	4.0%	4.6%	12.9%
Boat tour/ submarine ride/ whale watching	25.2%	31.2%	8.6%	23.9%	19.3%	36.8%	31.3%	32.2%
Visit towns/ communities	57.0%	62.1%	40.5%	51.4%	30.4%	43.0%	46.0%	53.0%
Private limousine/ van tour/ tour bus	5.5%	12.4%	14.3%	11.1%	28.1%	18.0%	8.3%	14.8%
Scenic views/ natural landmarks	66.9%	75.9%	23.7%	69.9%	50.0%	89.5%	63.7%	70.4%
Movie/ TV/ film location tours	5.0%	8.8%	6.0%	9.9%	7.9%	20.5%	21.6%	10.5%

ACTIVITIES - RECREATION

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	97.0%	96.8%	95.2%	97.9%	93.2%	98.0%	97.6%	98.2%
Beach/ sunbathing	85.5%	84.4%	74.5%	88.4%	65.3%	75.0%	83.0%	85.8%
Bodyboarding	11.7%	7.8%	0.6%	11.1%	1.7%	8.0%	5.0%	7.2%
Stand-up paddle boarding	4.5%	6.3%	1.8%	3.1%	2.9%	8.0%	6.5%	4.5%
Surfing	5.9%	7.3%	3.0%	11.9%	7.1%	4.0%	12.3%	10.1%
Canoe paddling	1.9%	2.2%	0.6%	1.7%	0.5%	2.3%	2.4%	2.1%
Kayaking	4.0%	6.0%	1.2%	4.1%	1.2%	6.3%	2.1%	4.1%
Swimming in the ocean	70.4%	70.5%	38.8%	72.3%	65.2%	42.7%	58.4%	72.4%
Snorkeling	48.3%	46.2%	15.2%	45.6%	20.2%	37.0%	56.4%	46.0%
Freediving	2.3%	1.6%	1.8%	1.4%	1.2%	4.0%	2.2%	2.1%
Windsurfing/ kitesurfing	0.5%	0.2%	0.3%	0.0%	0.0%	0.0%	0.7%	0.7%
Jet skiing/ parasailing	1.4%	1.9%	4.2%	1.3%	0.5%	0.0%	2.1%	0.4%
Scuba diving	1.9%	3.1%	1.2%	3.1%	3.2%	0.0%	1.1%	3.2%
Fishing	1.9%	2.9%	0.6%	2.5%	0.0%	2.0%	0.7%	0.7%
Golf	7.8%	6.8%	4.2%	7.7%	3.6%	0.0%	4.9%	2.8%
Running/ jogging/ fitness/ walking	30.5%	28.9%	18.6%	37.7%	22.8%	24.2%	13.1%	21.4%

ACTIVITIES - RECREATION (continued)

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	97.0%	96.8%	95.2%	97.9%	93.2%	98.0%	97.6%	98.2%
Cycling	2.6%	3.0%	3.0%	3.2%	2.5%	2.0%	1.8%	3.1%
Spa	10.2%	9.2%	4.5%	8.2%	4.8%	0.0%	5.7%	5.1%
Hiking	41.0%	49.0%	20.0%	45.3%	18.4%	45.0%	24.4%	49.6%
Backpacking/ camping	0.9%	2.0%	0.3%	0.9%	0.5%	8.0%	2.7%	2.1%
Agritourism	18.3%	24.3%	12.3%	14.7%	9.3%	12.5%	23.2%	15.0%
Sports event or tournament	1.4%	0.6%	0.6%	1.8%	0.0%	0.0%	1.1%	2.3%
Parks/ botanical gardens	36.1%	44.0%	25.8%	38.0%	31.3%	34.5%	29.4%	39.7%
Waterparks	1.5%	1.6%	1.5%	1.0%	1.2%	0.0%	6.4%	2.8%
Mountain tubing/ waterfall rappel	1.8%	3.0%	0.3%	3.2%	1.0%	0.0%	2.5%	3.2%
Ziplining	3.5%	5.0%	0.0%	2.7%	1.2%	4.0%	0.3%	3.1%
Skydiving	0.3%	0.2%	1.8%	0.0%	0.5%	0.0%	1.1%	0.0%
All-terrain vehicle (ATV)	2.9%	3.5%	0.6%	3.7%	3.7%	6.5%	11.2%	3.5%
Horseback riding	1.2%	2.0%	2.4%	1.4%	0.5%	4.0%	1.1%	1.7%
Tennis/ pickleball	2.7%	2.0%	0.9%	3.2%	0.8%	0.0%	2.1%	2.3%

ACTIVITIES – ENTERTAINMENT & DINING

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	98.8%	97.8%	97.3%	98.3%	97.6%	98.0%	98.9%	96.6%
Lunch/ sunset/ dinner/ evening cruise	18.5%	21.4%	16.7%	21.0%	16.1%	71.8%	34.7%	25.0%
Live music/ stage show	30.8%	38.5%	25.1%	32.3%	22.1%	28.8%	16.8%	31.1%
Nightclub/ dancing/ bar/ karaoke	7.8%	7.2%	2.4%	9.6%	8.4%	8.0%	2.8%	8.7%
Fine dining	52.6%	50.4%	38.9%	48.3%	31.2%	35.0%	49.0%	33.2%
Family restaurant	74.6%	70.8%	31.8%	67.5%	67.2%	33.0%	50.3%	50.6%
Fast food	36.9%	40.2%	54.8%	43.7%	50.3%	51.0%	61.4%	51.1%
Food truck	46.4%	48.7%	29.1%	47.9%	33.3%	35.0%	59.4%	51.1%
Café/ coffee house	53.8%	53.3%	58.1%	52.1%	61.3%	38.7%	64.6%	62.1%
Ethnic dining	24.2%	27.7%	6.6%	18.0%	10.1%	10.3%	20.7%	14.0%
Farm-to-table cuisine	17.0%	19.1%	15.9%	12.4%	3.1%	8.3%	4.6%	9.0%
Prepared own meal	45.3%	37.7%	21.1%	48.3%	24.2%	16.5%	12.7%	33.6%

ACTIVITIES - SHOPPING

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	96.7%	96.7%	98.8%	97.5%	95.9%	94.0%	97.5%	95.9%
Malls/ department stores	49.1%	46.4%	86.5%	58.6%	71.5%	63.2%	82.6%	64.5%
Designer boutiques	21.8%	25.0%	15.0%	18.1%	19.8%	20.5%	4.6%	16.9%
Hotel/ resort stores	43.3%	49.4%	41.8%	40.6%	36.4%	51.3%	50.1%	37.1%
Swap meet/ flea market	20.1%	19.3%	8.7%	20.1%	13.0%	8.3%	6.4%	12.1%
Discount/ outlet stores	14.7%	17.3%	30.3%	22.4%	35.0%	14.8%	62.9%	21.6%
Supermarkets	64.9%	58.1%	69.5%	62.9%	59.3%	52.7%	59.1%	74.4%
Farmer's market	32.7%	31.8%	15.9%	34.9%	13.6%	16.5%	6.4%	35.1%
Convenience stores	52.6%	51.6%	55.1%	54.8%	61.7%	50.7%	62.5%	36.2%
Duty-free stores	3.9%	4.8%	21.0%	9.3%	11.6%	24.5%	36.0%	8.0%
Hawai'i-made products	53.2%	57.4%	21.9%	48.6%	34.2%	46.5%	30.1%	55.1%
Local shops and artisans	62.7%	66.1%	14.1%	60.7%	45.3%	31.0%	20.1%	59.1%
Local fashion designers	11.7%	11.7%	3.9%	12.9%	9.2%	2.3%	3.2%	16.2%

ACTIVITIES - HISTORY, CULTURE & FINE ARTS

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	69.2%	77.8%	65.6%	69.1%	74.2%	81.8%	66.7%	73.0%
Historic military sites and museums	18.7%	31.0%	11.4%	22.5%	44.7%	44.7%	24.2%	37.9%
Historic Hawaiian sites and museums	34.9%	42.7%	21.3%	36.7%	39.7%	32.8%	11.3%	38.9%
Other historical sites, museums, and homes	13.4%	15.6%	7.5%	14.0%	13.0%	8.3%	23.4%	15.6%
Art museums	3.1%	3.4%	4.8%	3.7%	3.4%	10.5%	6.9%	6.9%
Art galleries and exhibitions	11.6%	10.8%	4.5%	11.2%	6.6%	10.3%	1.8%	8.6%
Lū'au/ Polynesian show/ hula show	25.4%	37.1%	17.1%	30.2%	25.0%	10.5%	16.2%	26.8%
Lesson- ex. ukulele, hula, canoe, lei making	6.1%	8.4%	6.6%	5.2%	1.2%	0.0%	10.5%	6.2%
Play/ concert/ theatre	3.5%	3.3%	9.6%	4.5%	7.9%	2.0%	3.7%	5.5%
Art/ craft fair	11.8%	10.9%	3.3%	8.6%	4.2%	18.2%	2.9%	4.0%
Festival/ event	5.3%	5.3%	7.5%	5.8%	3.4%	4.3%	2.8%	5.6%

ACTIVITIES - TRANSPORTATION

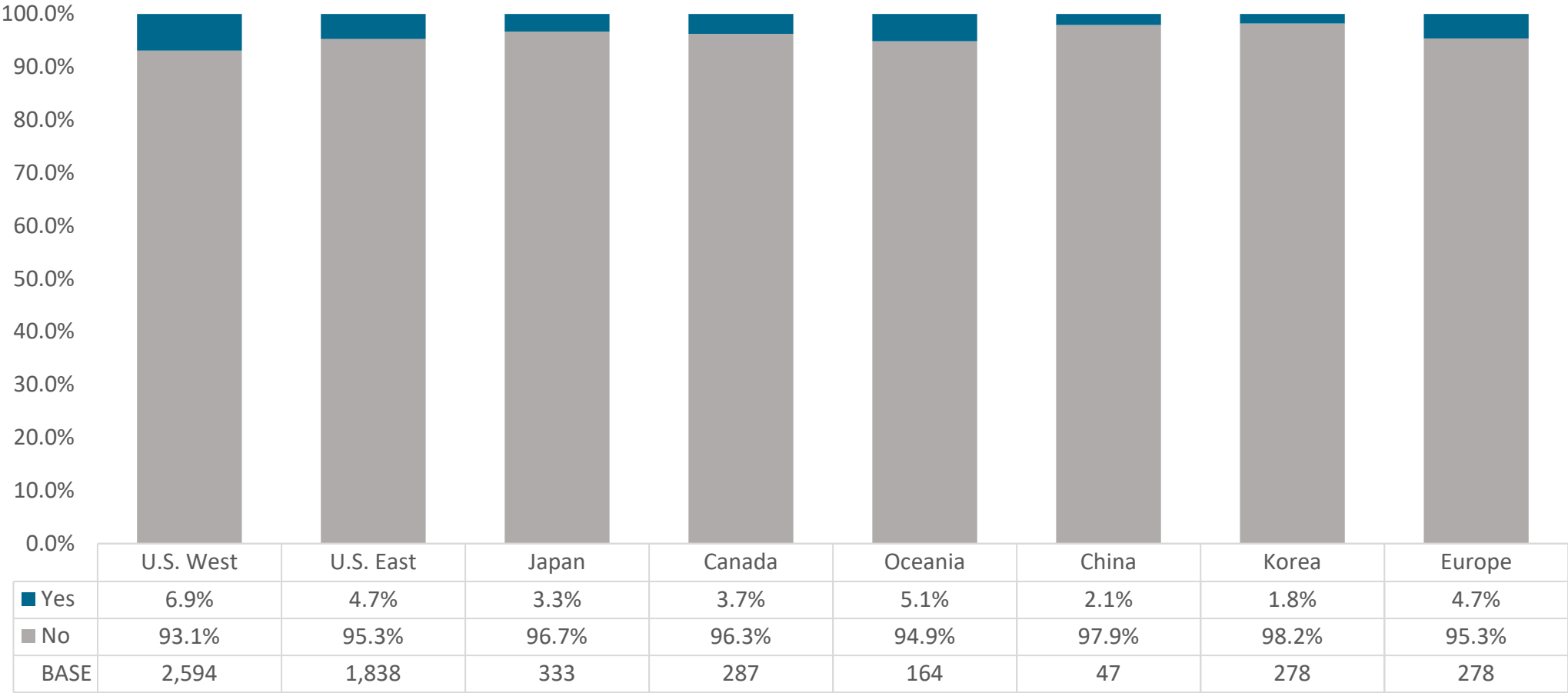
	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	93.7%	93.4%	98.2%	94.8%	95.4%	89.5%	95.3%	95.2%
Airport shuttle	19.0%	17.1%	23.6%	17.6%	28.5%	22.2%	17.8%	16.5%
Trolley	1.8%	2.9%	53.3%	3.4%	18.3%	10.3%	24.8%	6.0%
Public bus	4.8%	4.2%	30.6%	10.9%	25.8%	32.2%	16.4%	19.3%
Tour bus/ tour van	7.0%	14.9%	23.6%	15.5%	34.6%	12.3%	21.6%	18.2%
Taxi/ limo	5.6%	8.6%	31.8%	19.2%	34.8%	28.5%	29.9%	18.0%
Rental car	76.0%	73.2%	21.6%	64.6%	27.4%	43.0%	54.6%	64.8%
Ride share	19.7%	24.3%	27.0%	28.0%	39.1%	38.5%	32.8%	28.6%
Car share	4.1%	3.1%	0.6%	3.0%	1.2%	2.0%	4.0%	1.7%
Bicycle rental	2.3%	2.7%	4.5%	2.6%	1.7%	2.0%	3.5%	3.4%

ACTIVITIES - OTHER

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	35.4%	33.6%	18.6%	29.4%	14.1%	6.3%	19.3%	18.3%
Visiting friends/ family	26.6%	23.7%	13.5%	17.8%	9.2%	6.3%	13.7%	13.8%
Volunteering/ giving back to the local community	1.9%	2.5%	0.6%	2.9%	0.0%	0.0%	1.8%	3.7%
Health and wellness activities	11.0%	11.4%	4.8%	11.0%	5.8%	0.0%	5.5%	3.7%

Section 3 – Travelers with Disabilities

DISABLED TRAVELER - REQUIRED ASSISTANCE

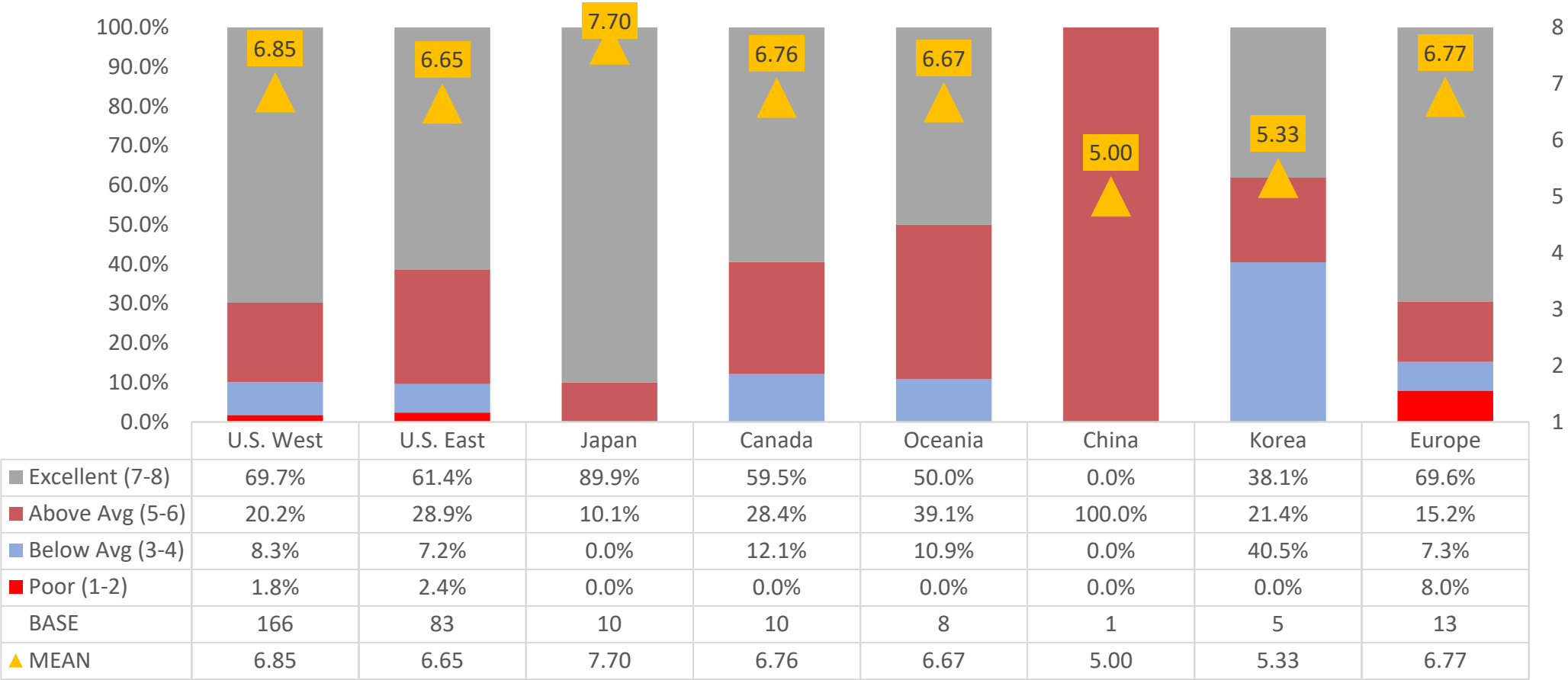


DISABLED TRAVELER – REQUIRED ASSISTANCE

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
Mobility aid	60.7%	65.5%	27.2%	69.9%	80.4%	100.0%	21.4%	55.1%
Personal assistance	33.5%	29.9%	8.9%	27.7%	19.6%	0.0%	38.1%	30.4%
NA- No one needed assistance	6.2%	5.7%	54.6%	0.0%	0.0%	0.0%	19.0%	22.5%
Orientation and Mobility Assistance	7.1%	4.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other	4.3%	6.9%	0.0%	19.3%	0.0%	0.0%	0.0%	8.0%
Lift-equipped van	1.6%	2.3%	9.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Disabled parking/ placard	2.3%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Service/ assistance animal	1.6%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ambulance/ hospital/ medical visit	1.6%	0.0%	0.0%	0.0%	9.8%	0.0%	0.0%	0.0%
Respiratory equipment	1.1%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
ASL Interpreter/ texting/ captioning	0.0%	0.0%	18.3%	0.0%	0.0%	0.0%	21.4%	0.0%
Print material in alternate format	0.5%	0.0%	0.0%	0.0%	15.7%	0.0%	21.4%	0.0%
No help was offered	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
BASE	180	87	11	11	9	1	5	13

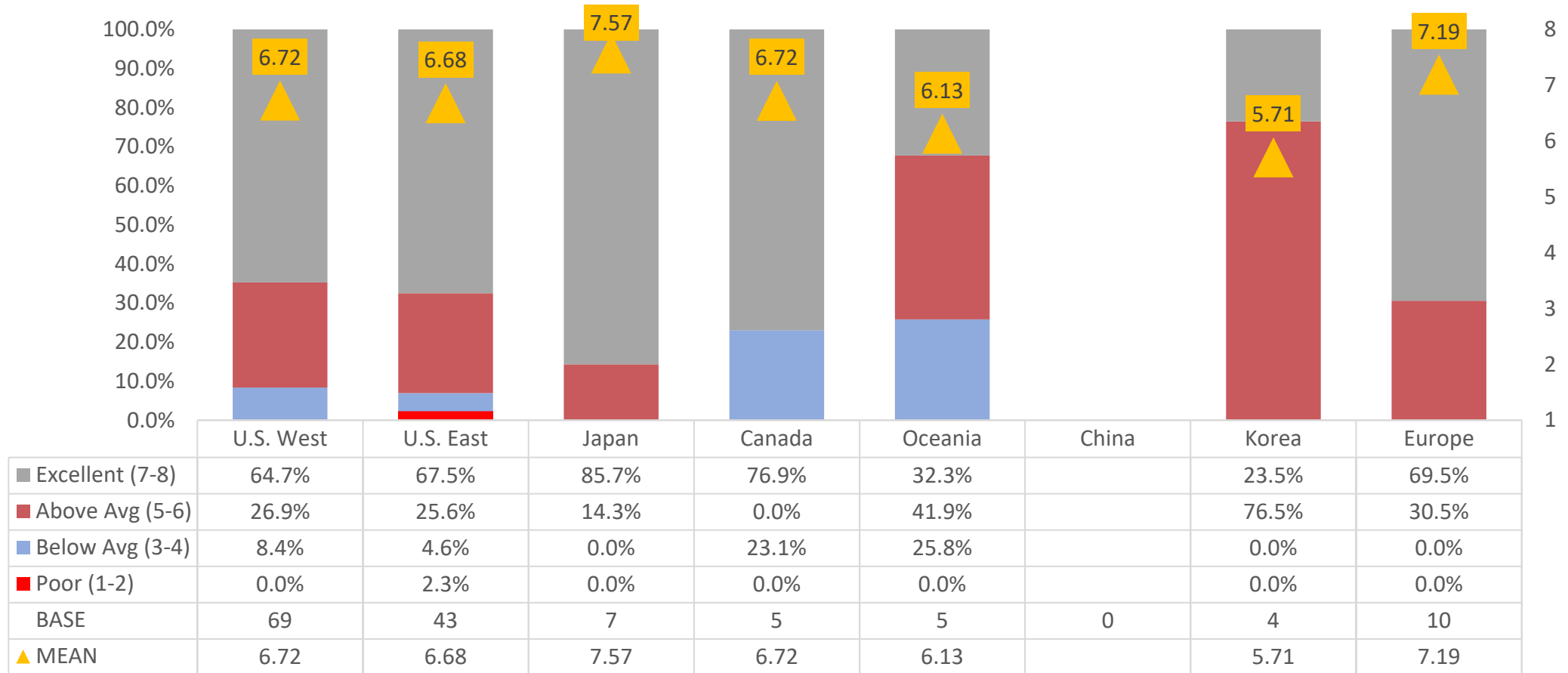
OVERALL ACCESSIBILITY - AIRPORTS

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



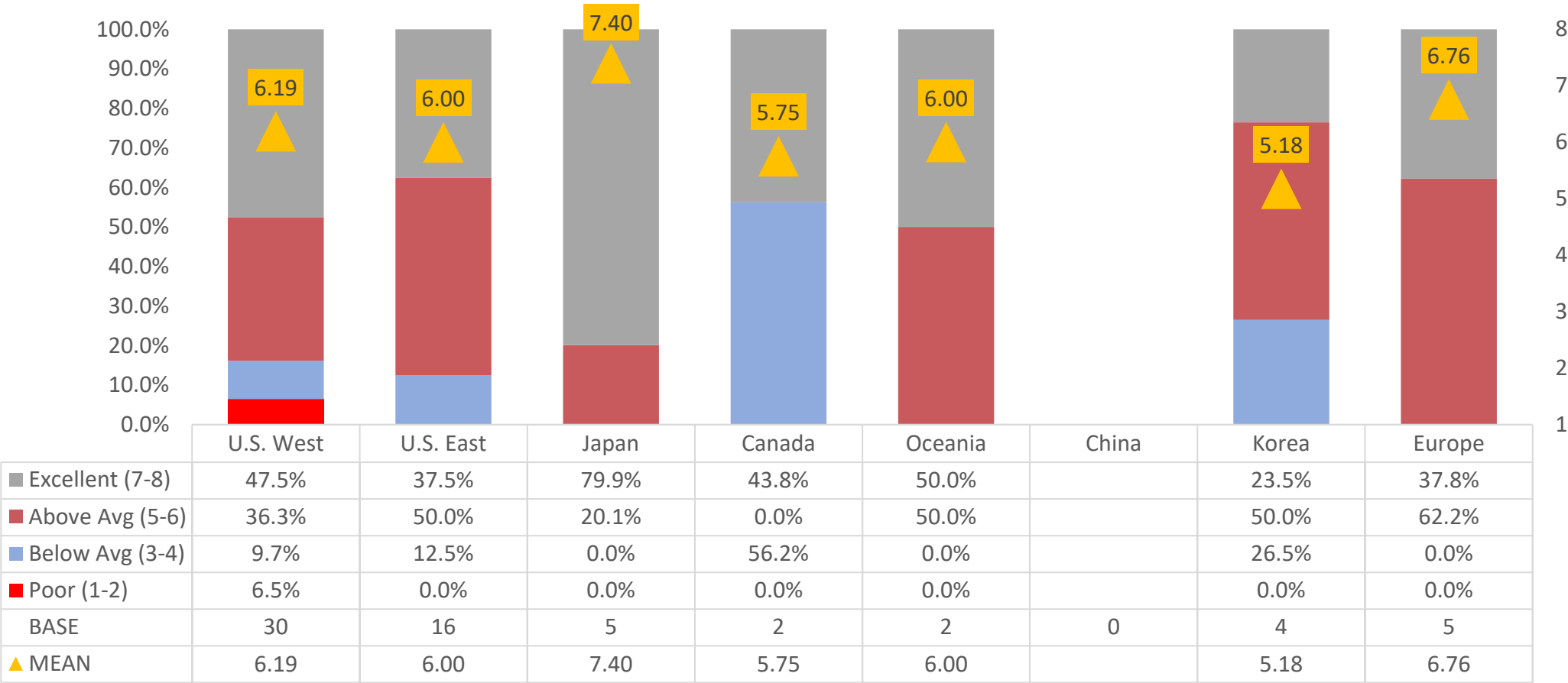
OVERALL ACCESSIBILITY - PRIVATE TRANSPORTATION

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



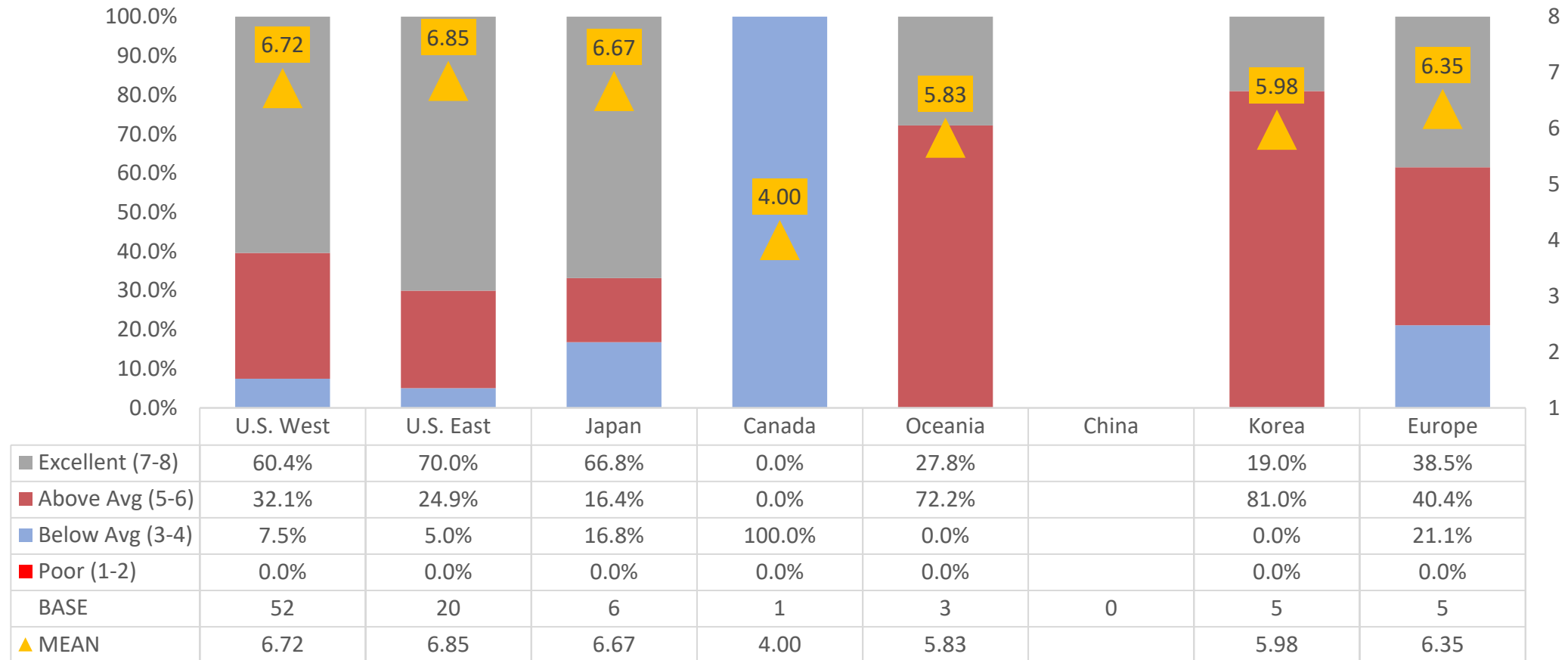
OVERALL ACCESSIBILITY - PUBLIC TRANSPORTATION

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



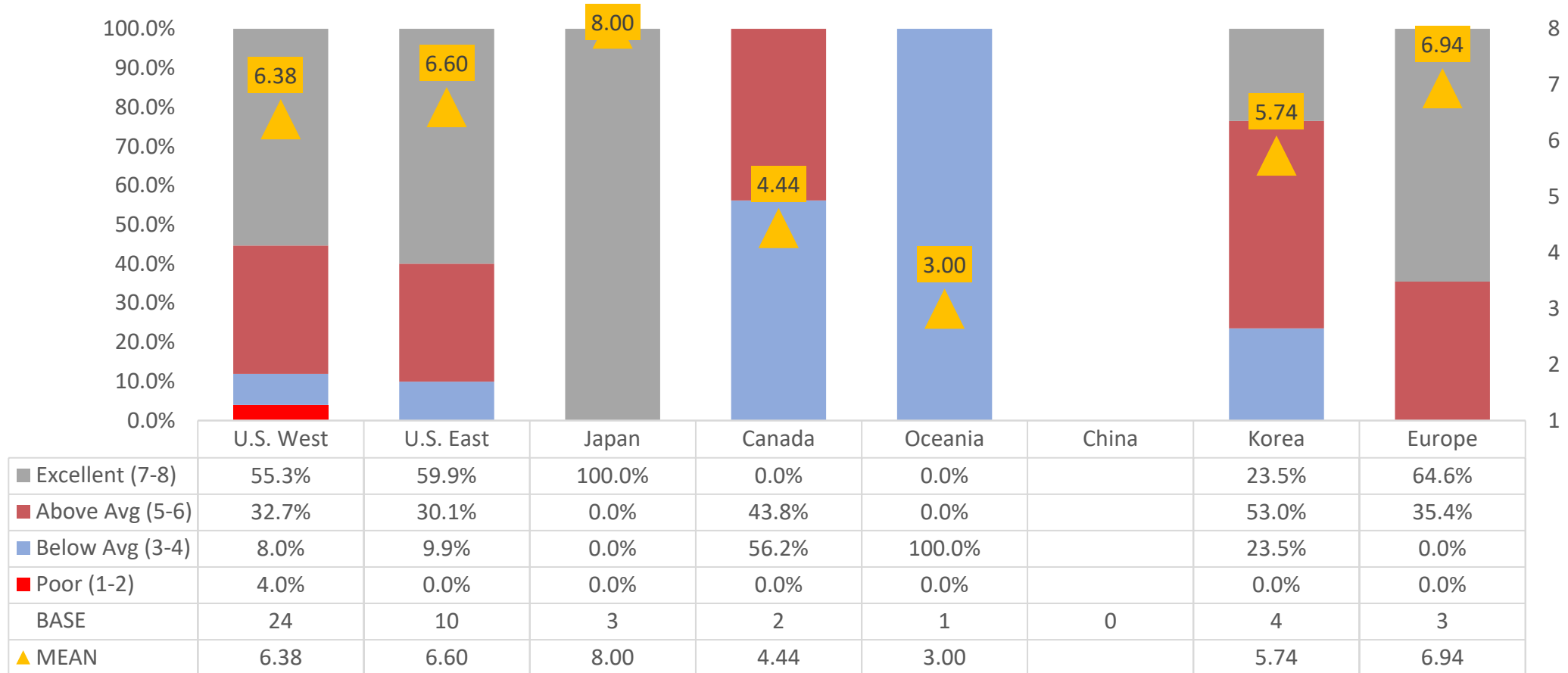
OVERALL ACCESSIBILITY - RIDE SHARE/ CAR SHARE

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



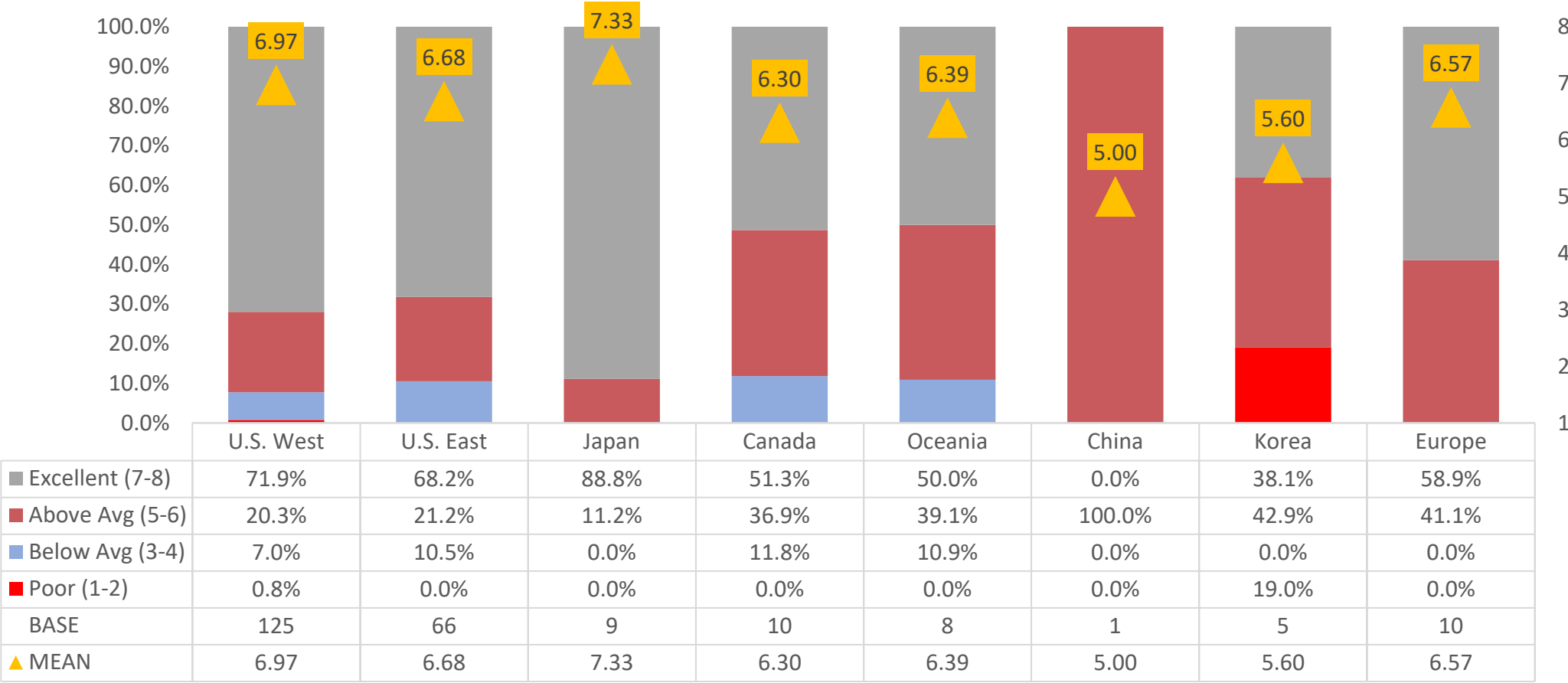
OVERALL ACCESSIBILITY - DEPARTMENT OF AGRICULTURE ANIMAL QUARANTINE

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



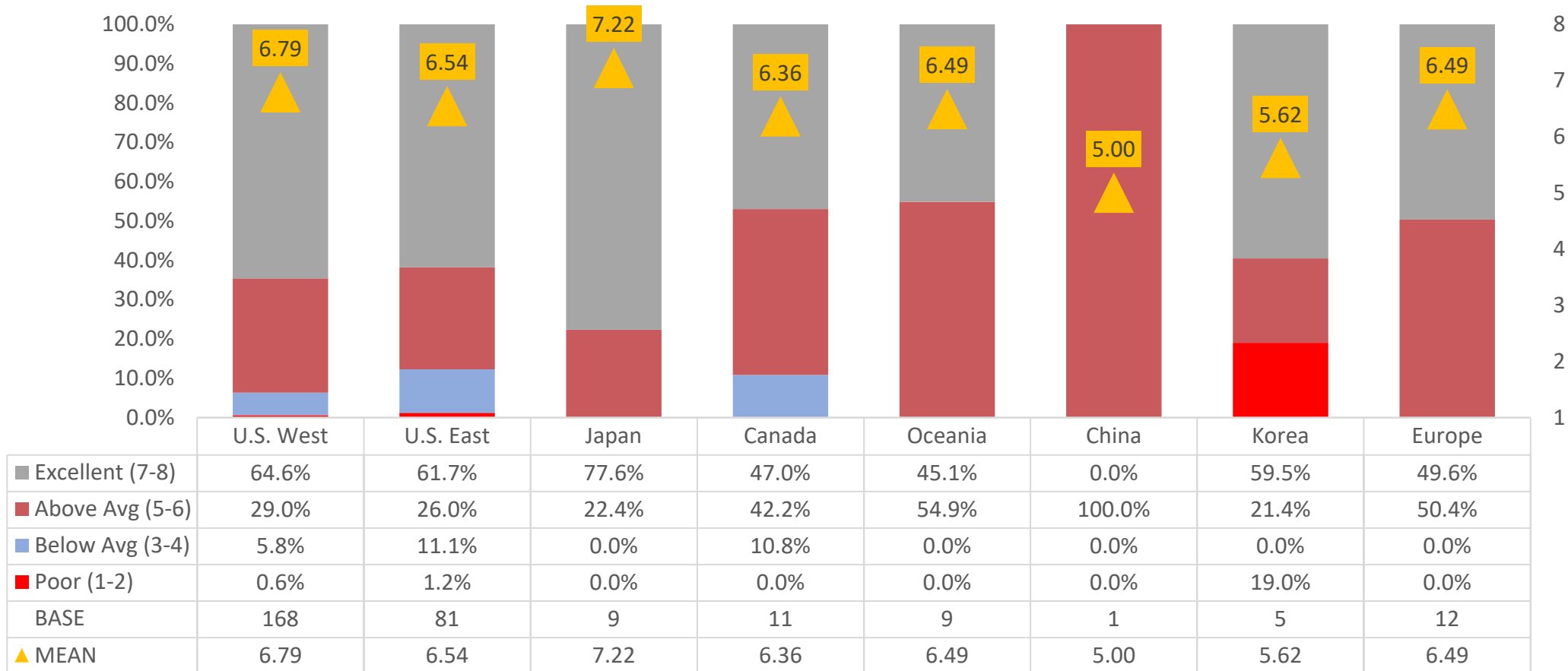
OVERALL ACCESSIBILITY - HOTELS

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



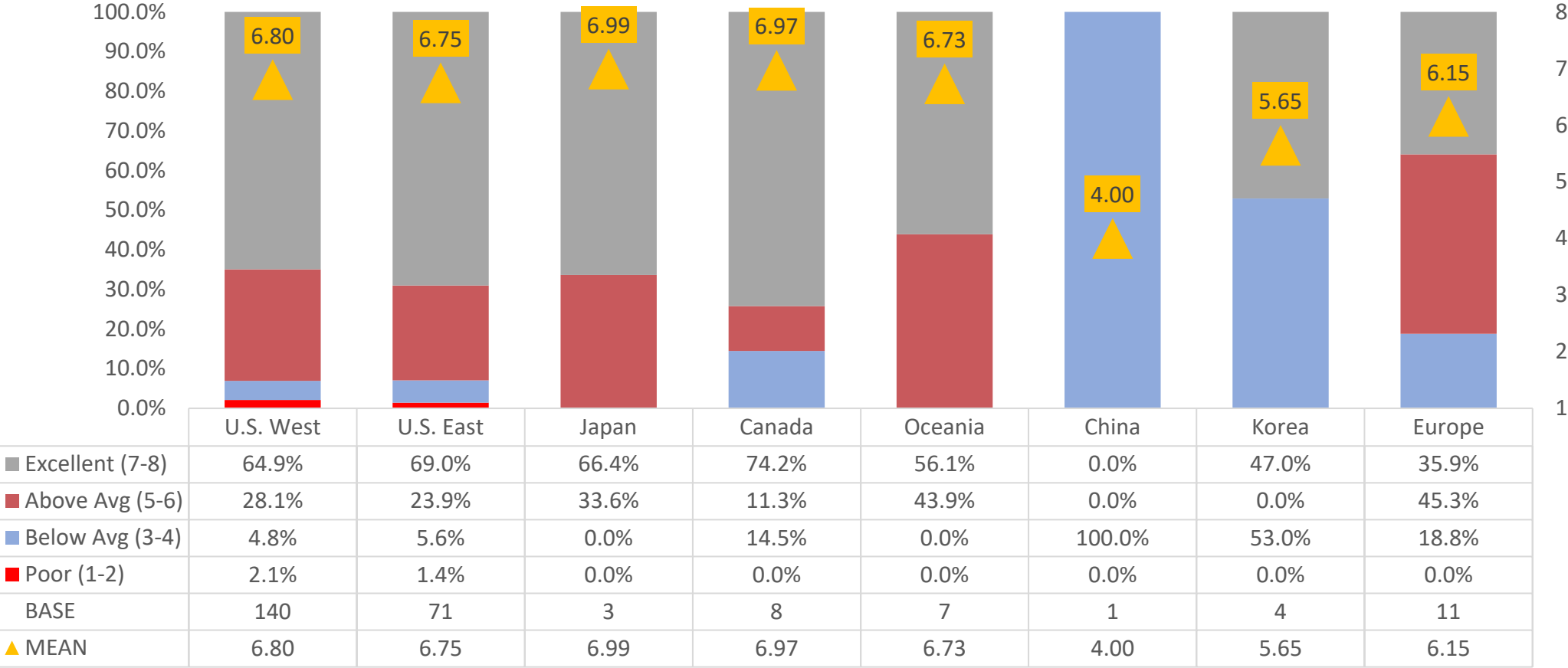
OVERALL ACCESSIBILITY – RESTAURANTS

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



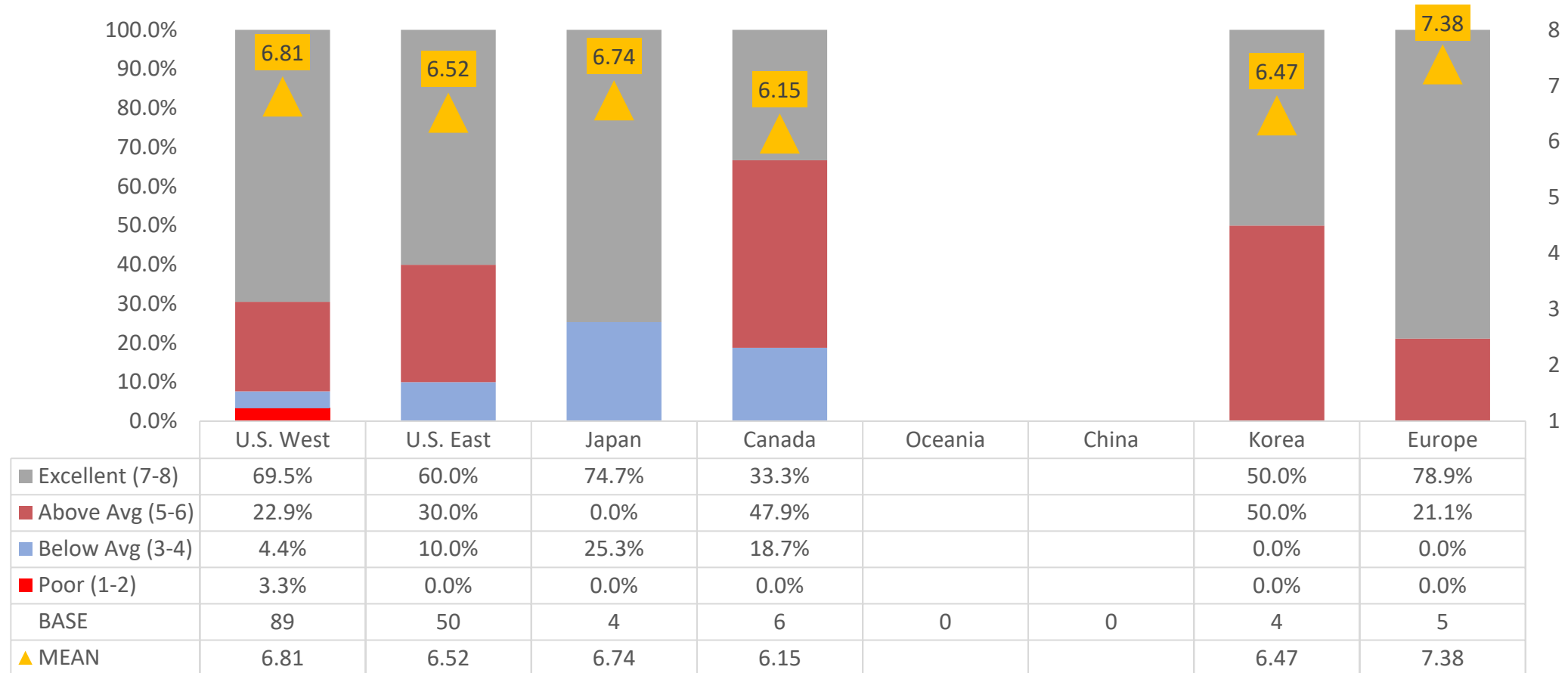
OVERALL ACCESSIBILITY - PUBLIC ATTRACTIONS

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



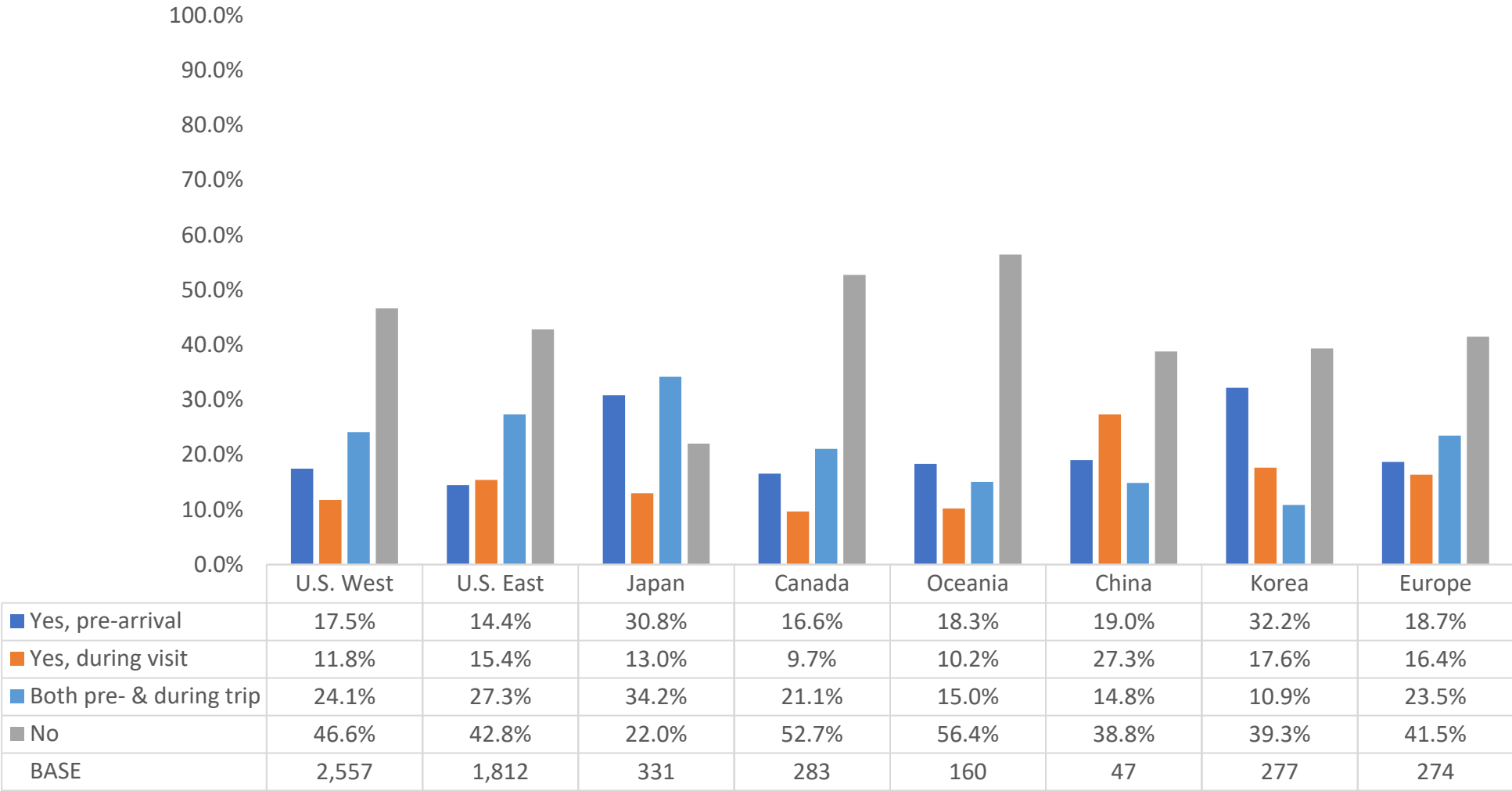
OVERALL ACCESSIBILITY – PRIVATE ATTRACTIONS

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

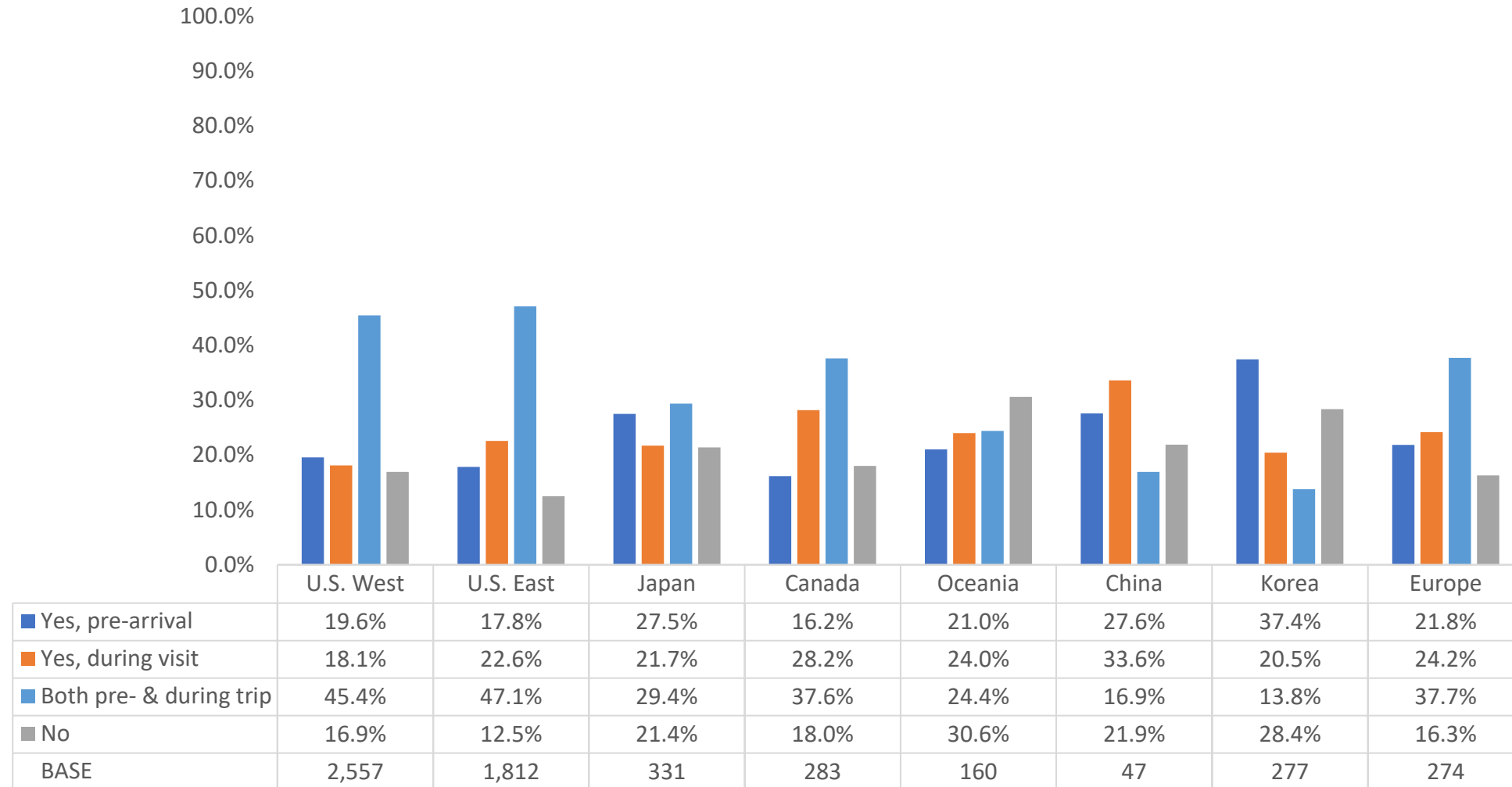


Section 4 – Messaging

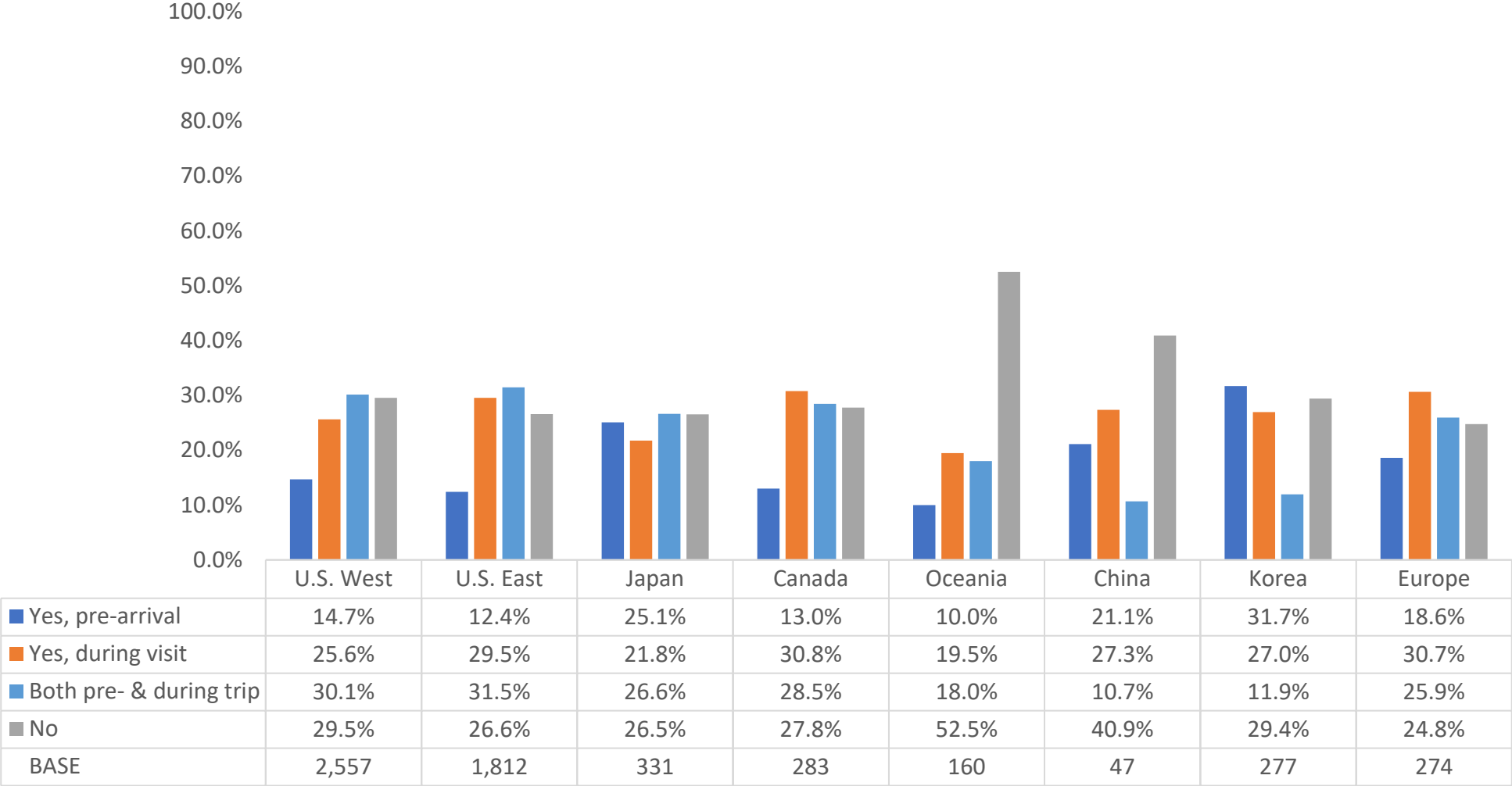
SAFE AND RESPONSIBLE TRAVEL



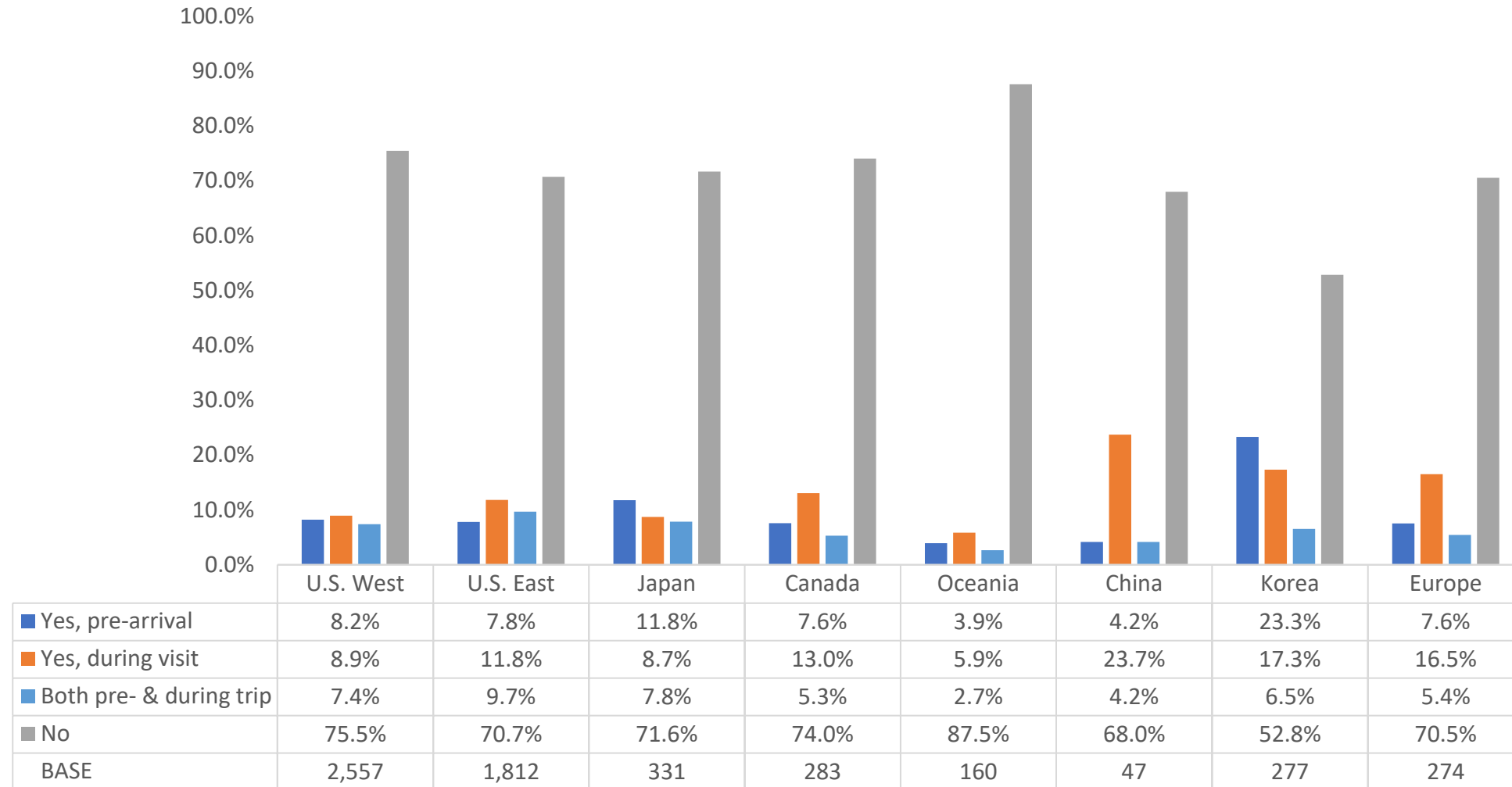
CARING FOR AND RESPECTING HAWAI'I'S CULTURE, PEOPLE AND ENVIRONMENT



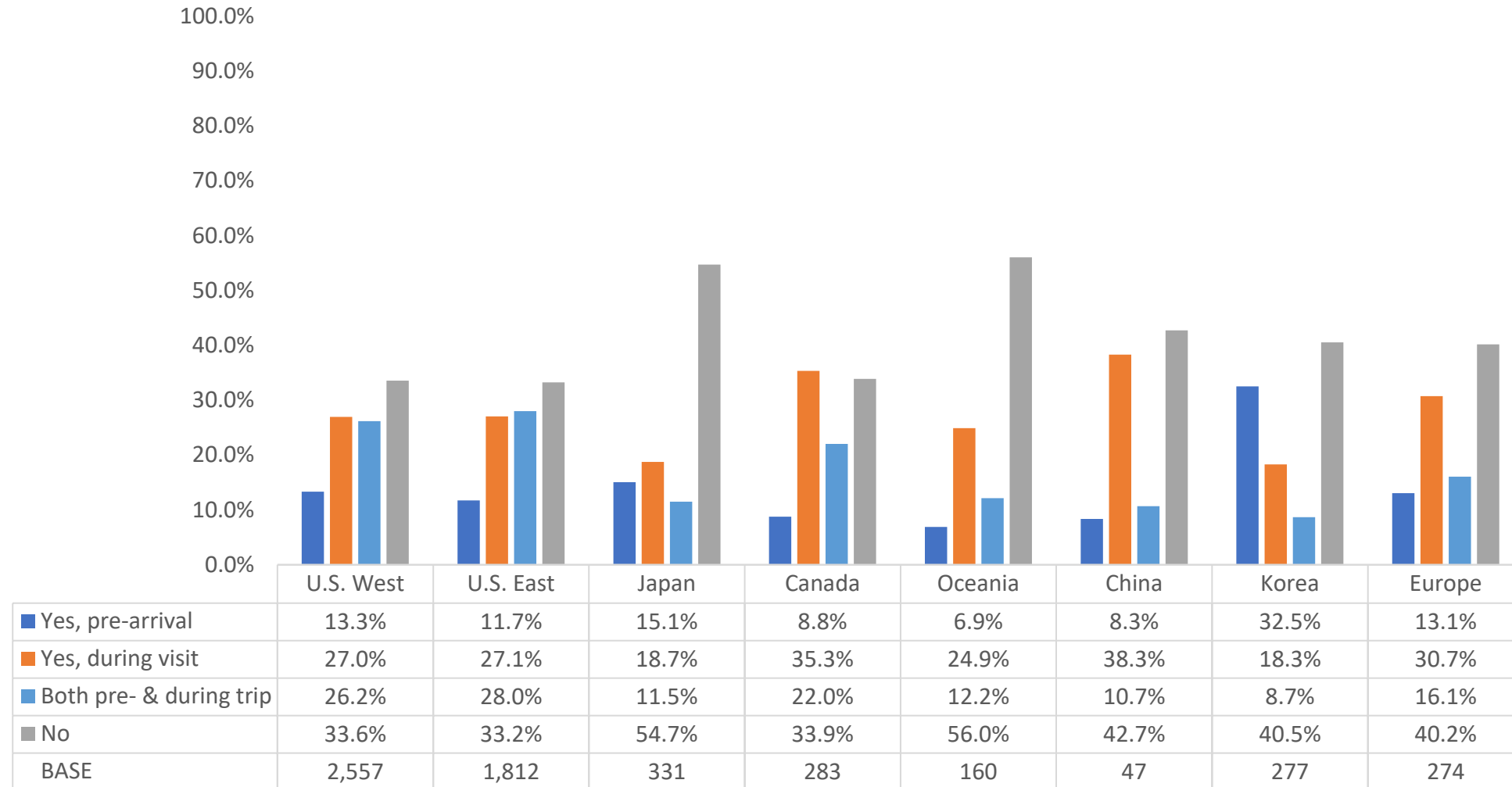
OCEAN AND HIKING SAFETY



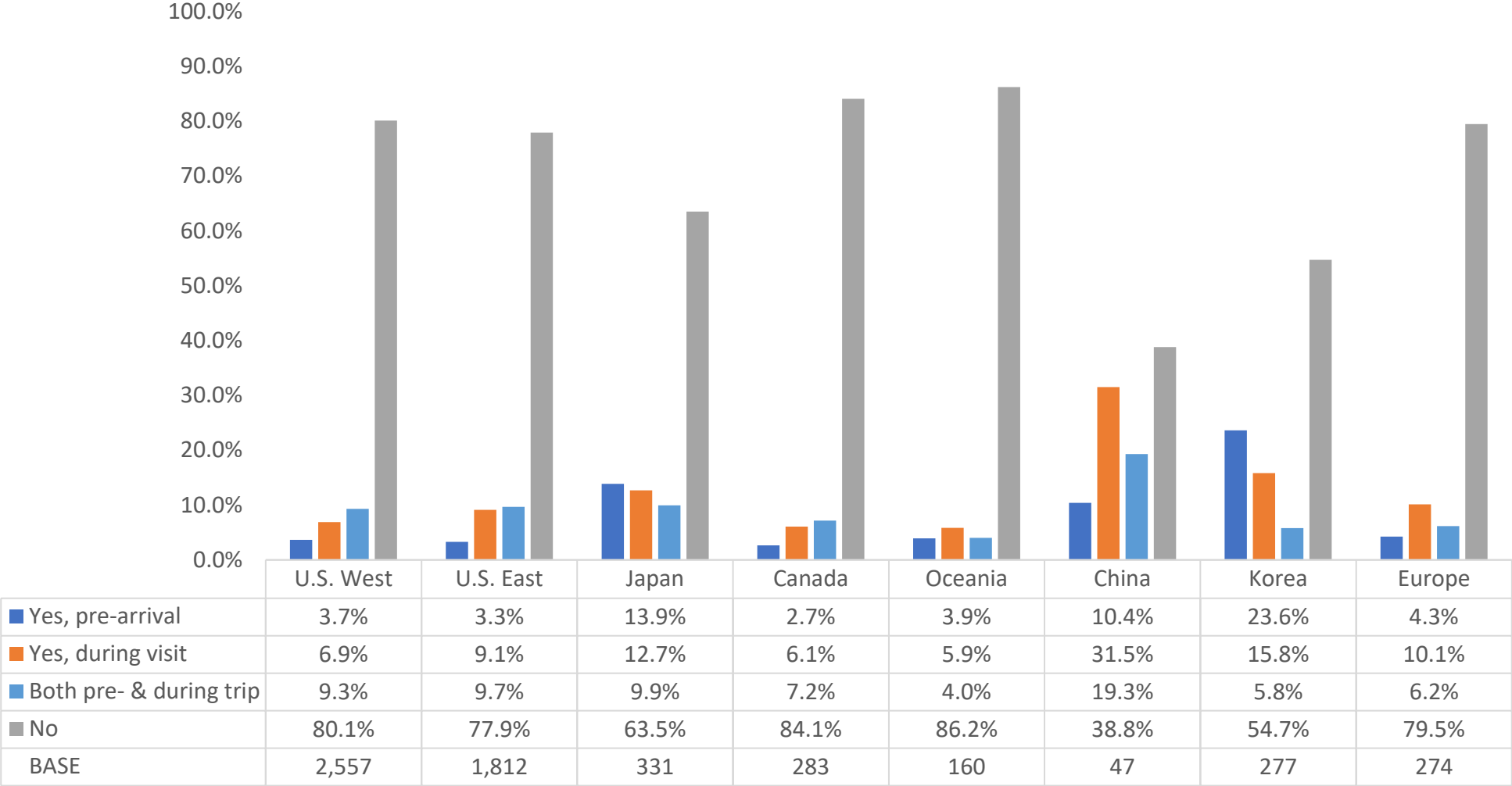
VOLUNTEER / GIVE-BACK OPPORTUNITIES



SUPPORT LOCAL / SHOP LOCAL

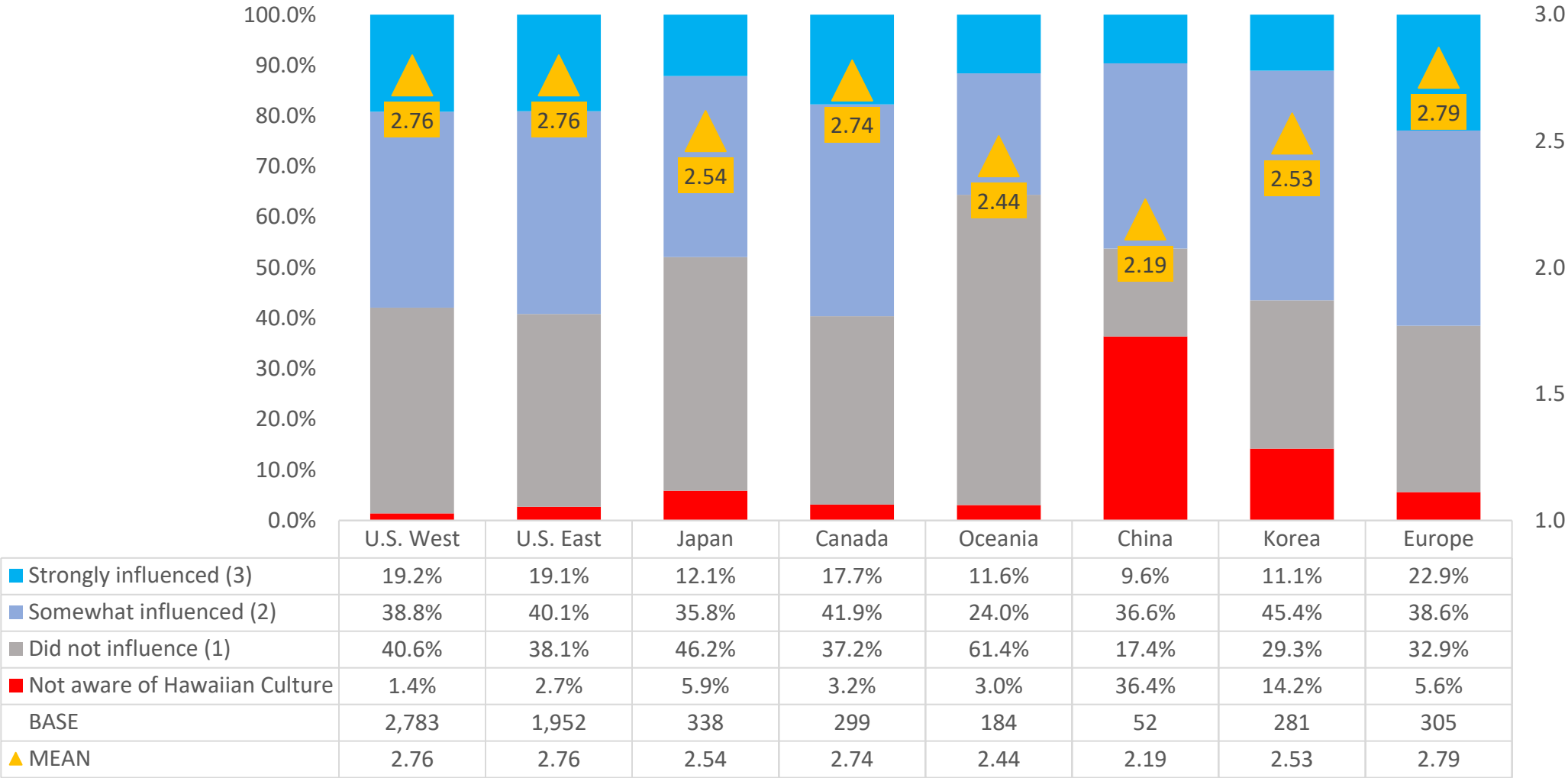


MĀLAMA HAWAI‘I



Section 5 – Hawaiian Culture

HAWAIIAN CULTURE IMPACT ON TRIP PLANNING



Section 6 – Destination Drivers

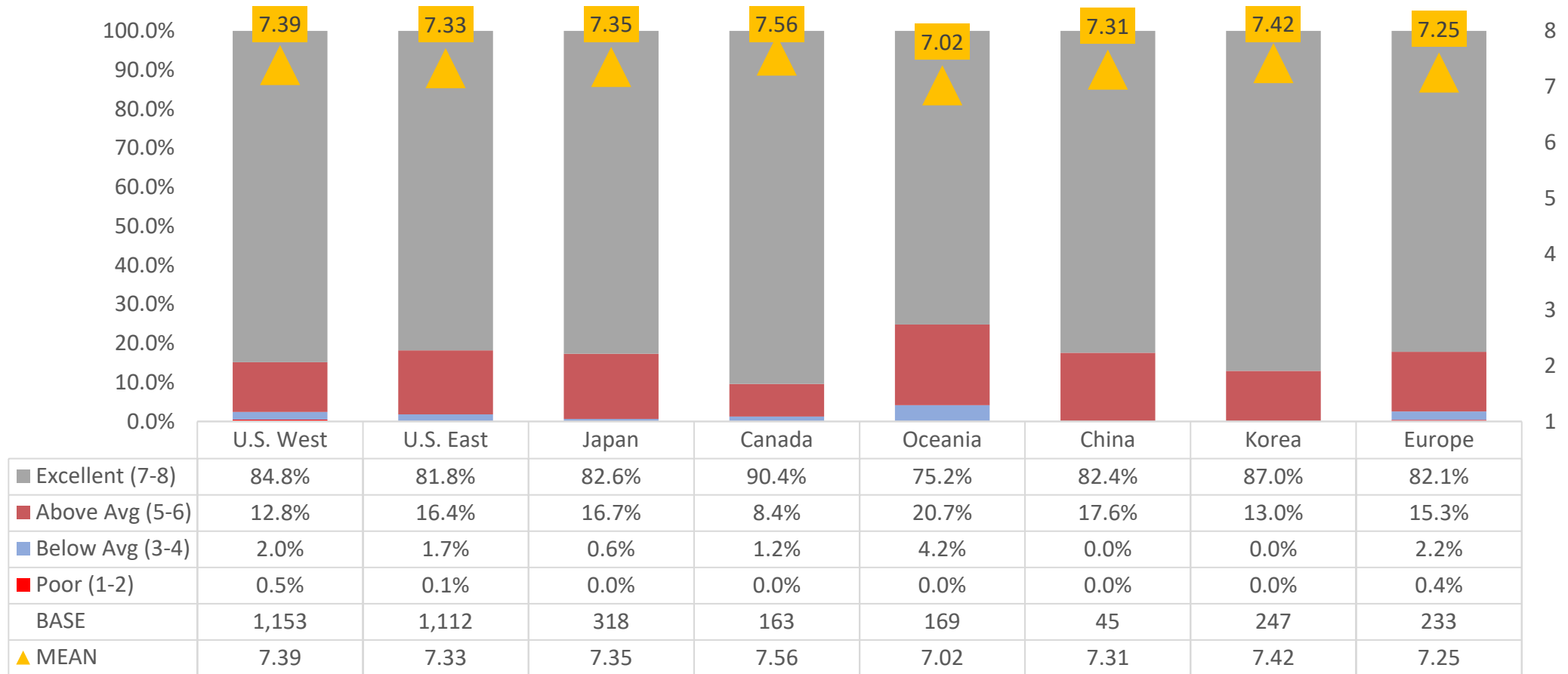
DESTINATION DRIVERS

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
Personal connection, repeat visitor	16.9%	12.7%	9.8%	15.4%	7.5%	3.1%	2.1%	5.9%
Time with family and friends, influence of family/ friends	15.7%	16.4%	4.2%	10.1%	8.1%	0.7%	4.0%	9.9%
Personal preference, love Hawai'i	12.4%	8.2%	20.8%	13.4%	12.8%	3.6%	4.0%	10.6%
Natural beauty and scenery	10.5%	12.3%	4.7%	12.6%	4.2%	15.7%	15.7%	17.1%
Special event or occasion, incl honeymoon	9.3%	10.3%	8.9%	4.2%	3.7%	6.3%	4.0%	7.8%
First-time visitor, wanted to experience Hawai'i	7.9%	11.9%	8.2%	9.5%	9.7%	6.2%	15.0%	19.1%
Vacation, leisure	8.6%	5.9%	7.1%	5.5%	12.6%	13.7%	0.0%	5.8%
Beaches, ocean activities	9.8%	5.1%	2.7%	5.6%	6.3%	4.4%	5.9%	5.3%
Weather, climate	8.9%	3.9%	4.5%	11.4%	8.7%	9.9%	4.2%	3.9%
Convenience, proximity, location	9.3%	1.9%	3.3%	4.8%	40.0%	1.8%	5.9%	3.7%
Work, business trip	5.3%	11.6%	1.8%	9.1%	2.1%	8.6%	9.4%	11.1%
Located in the U.S.	4.4%	6.3%	1.8%	1.4%	1.6%	0.3%	0.0%	2.0%
Hawaiian culture, the aloha spirit	4.6%	4.8%	2.7%	6.1%	2.2%	0.7%	0.0%	4.8%

Section 7 – O‘ahu

SATISFACTION - O'AHU

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

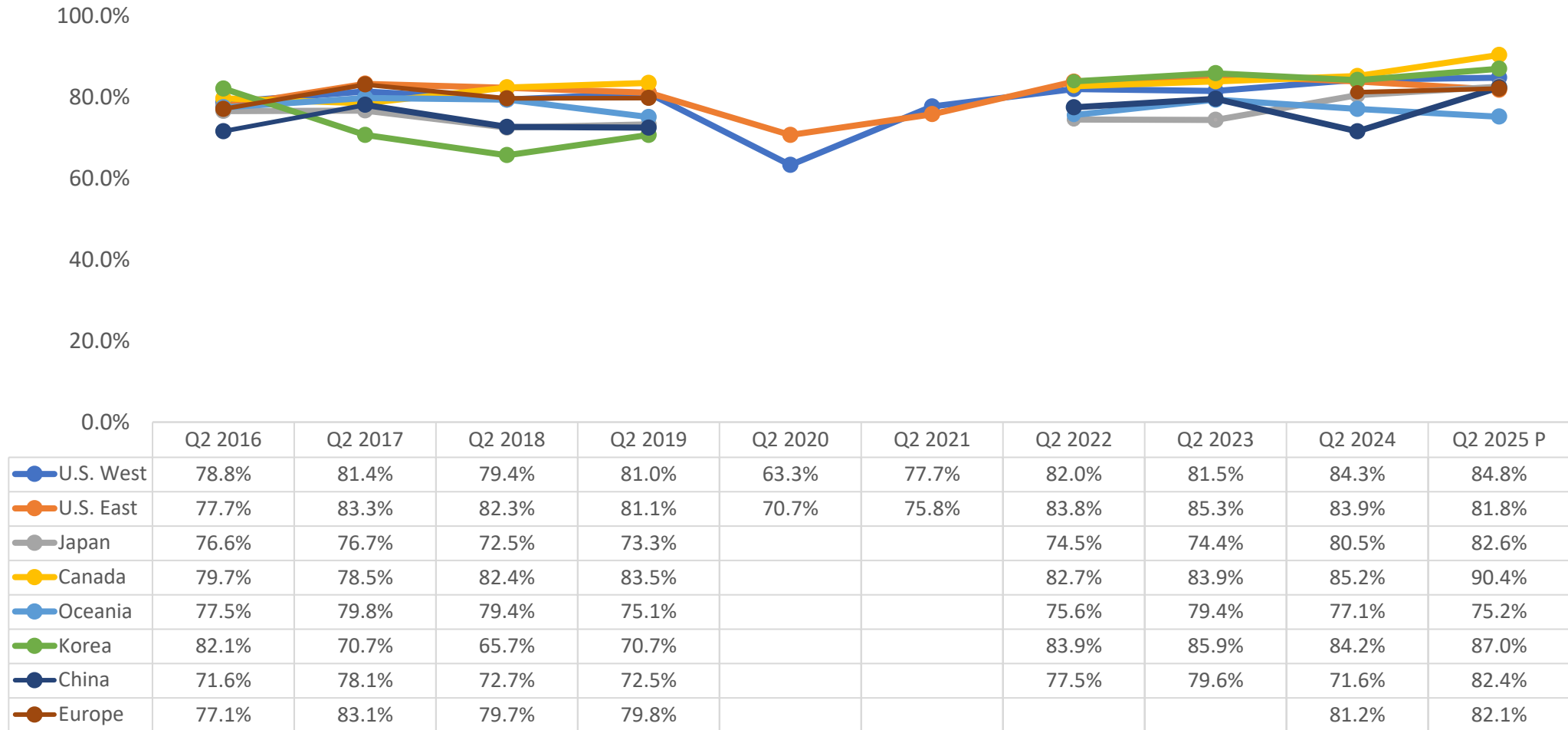


SATISFACTION – O‘AHU

- ***Trips to Hawai‘i:*** First-time visitors from **Japan** expressed higher levels of satisfaction than repeat visitors from this market.
- ***Age:*** Younger travelers under 35 from **Japan** gave higher satisfaction scores compared to older travelers from this visitor market.
- ***Islands visited:*** Visitors from **U.S. West, U.S. East** and **Canada** whose trip consisted of staying on just O‘ahu gave higher mean satisfaction scores compared to those whose trip consisted of stops on multiple islands from these visitor markets.

SATISFACTION - O'AHU

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



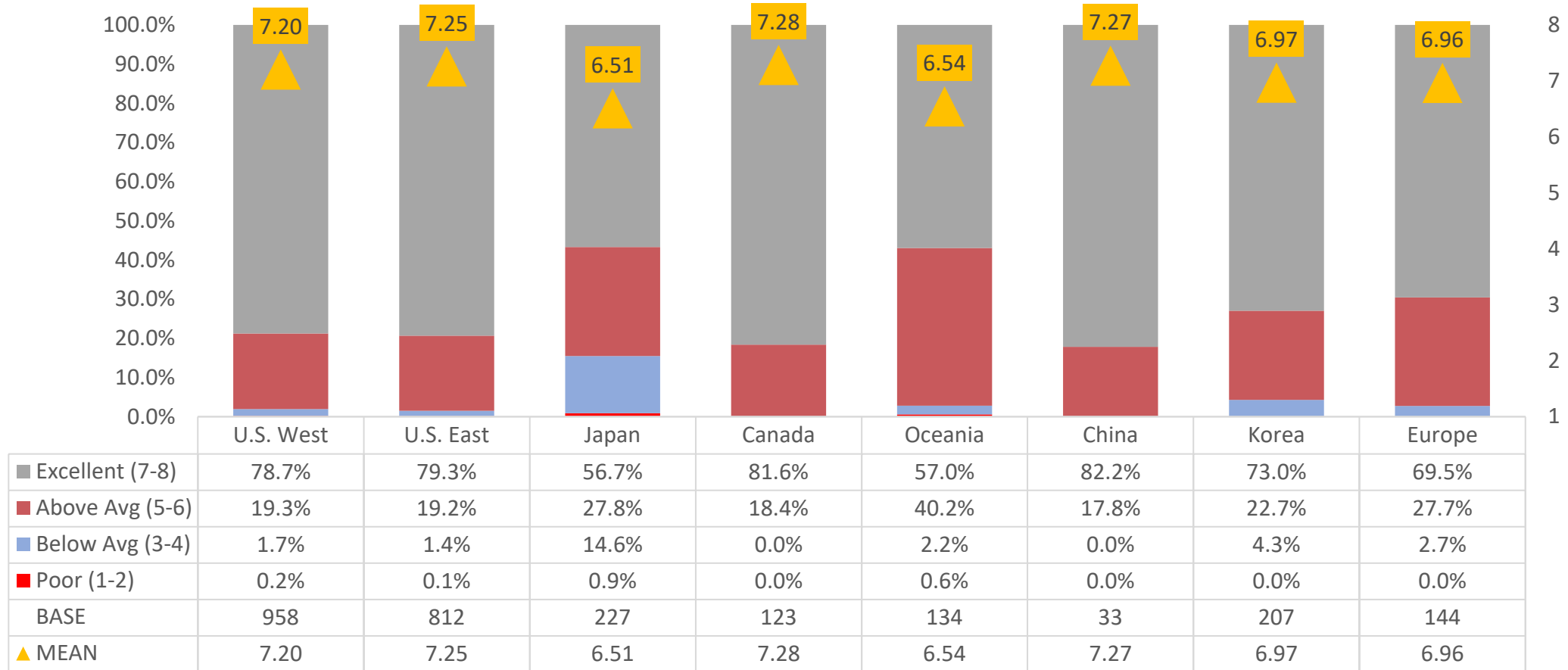
P= Preliminary Data

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. For Europe, the pandemic resulted in too few travelers in the second half of 2020. Visitors from Europe were not surveyed in 2021 through 2023.

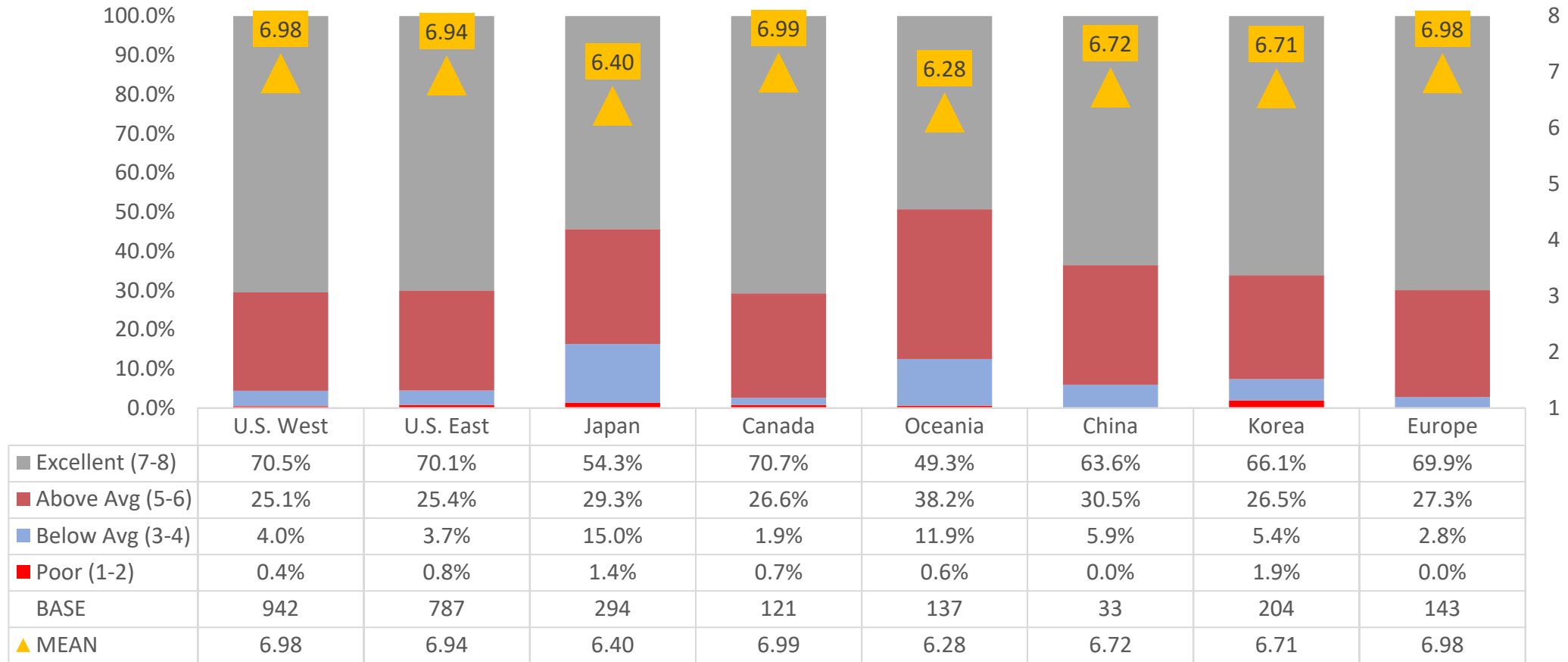
ENTERTAINMENT/ ATTRACTIONS - O'AHU

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



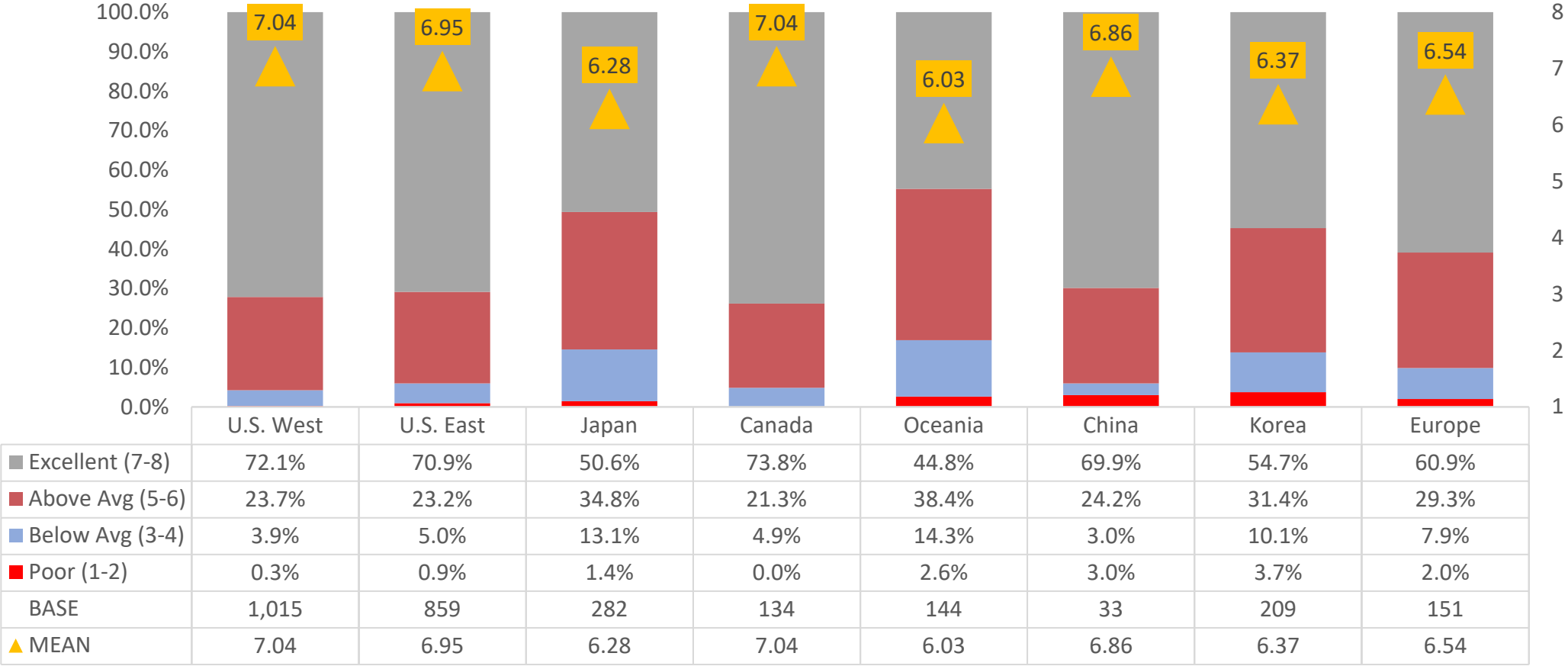
SHOPPING - O'AHU

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



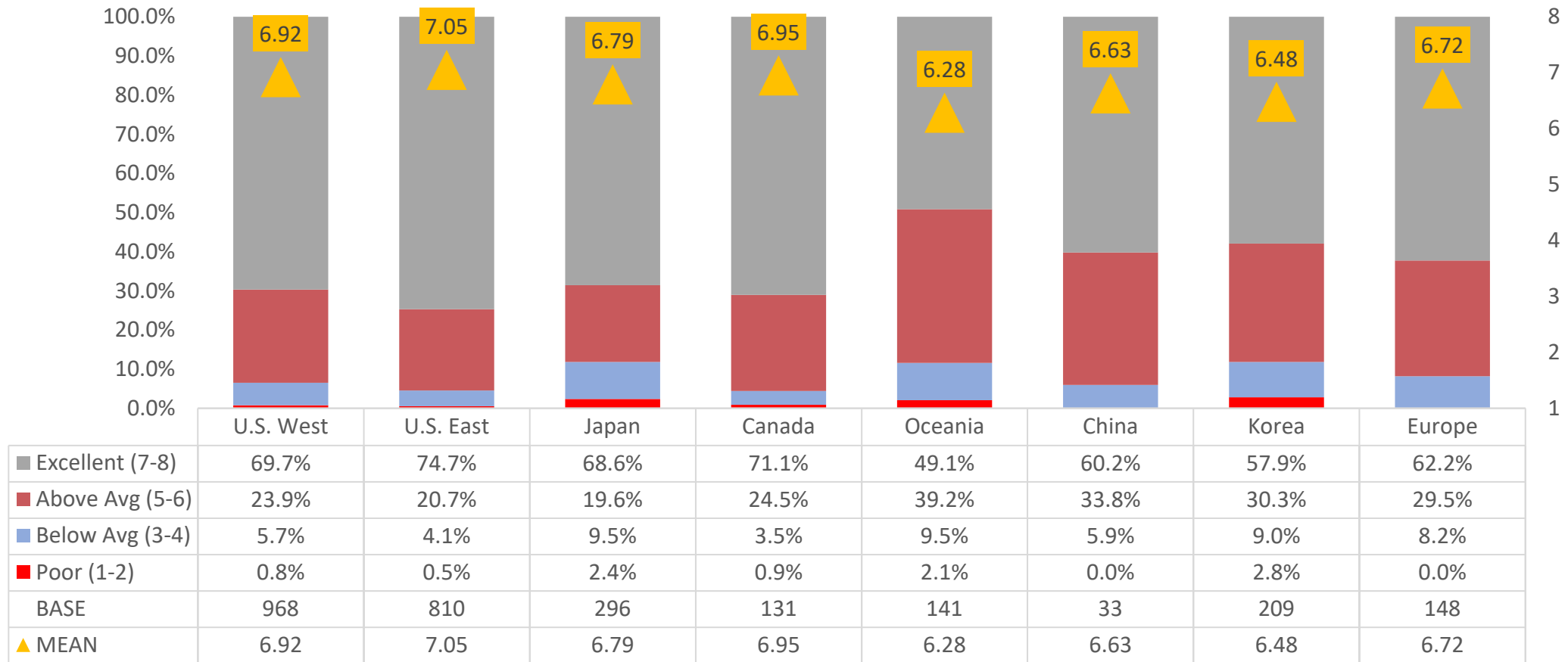
DINING/ FOOD & BEVERAGES - O'AHU

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



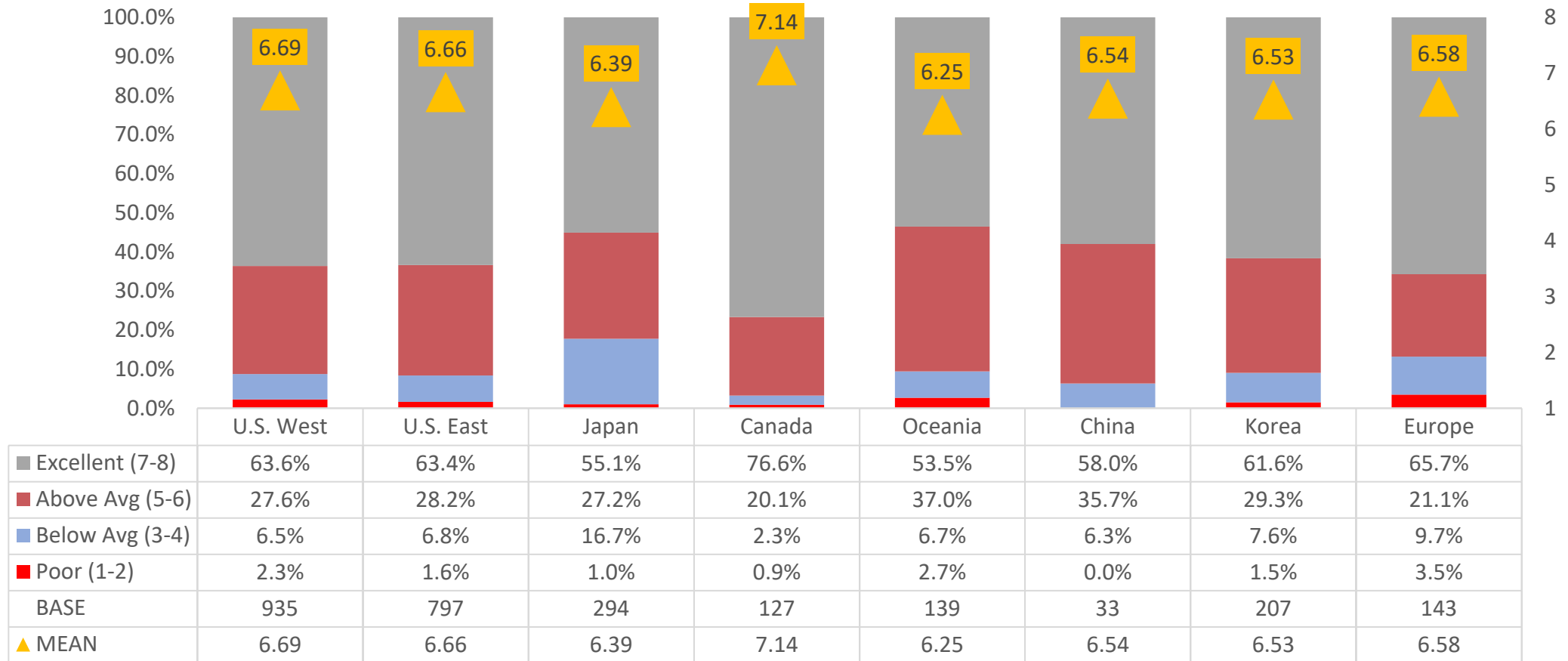
LODGING/ ACOMMODATIONS - O‘AHU

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



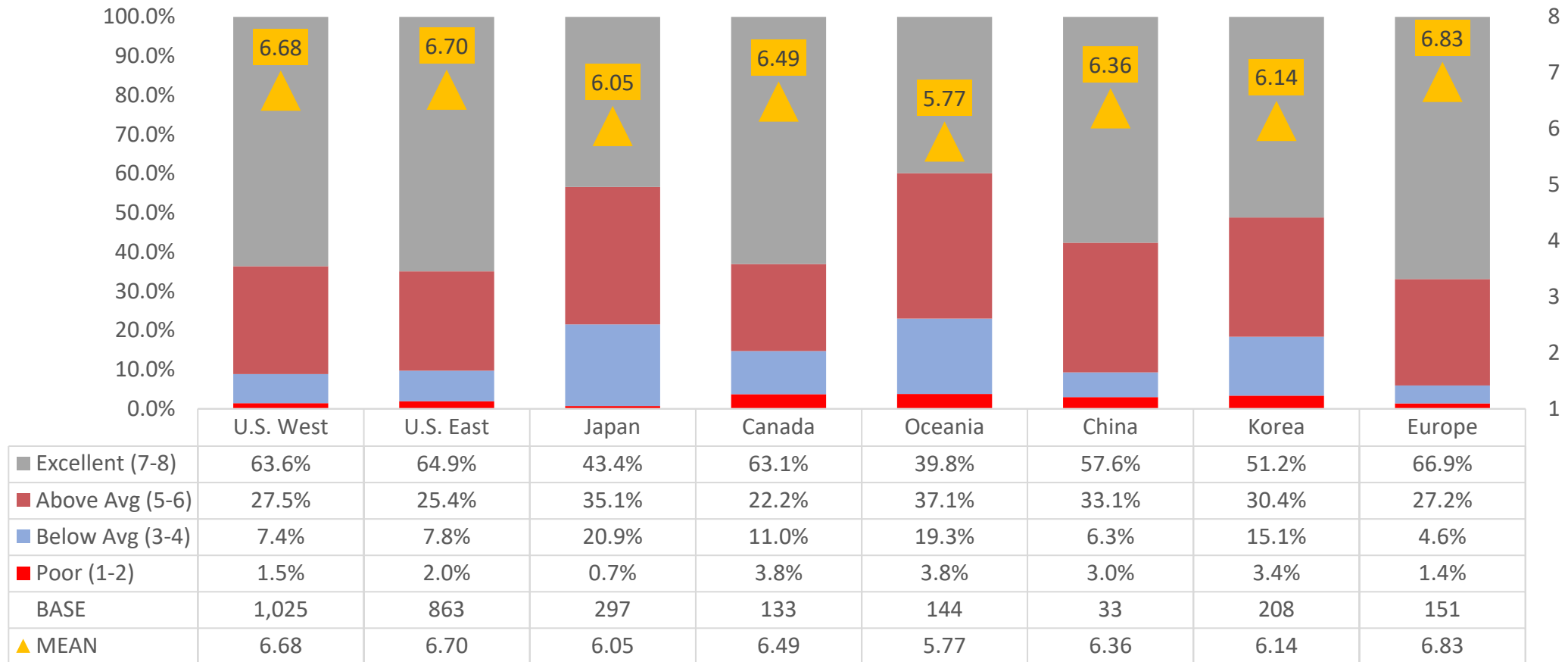
TRANSPORTATION ON ISLAND - O'AHU

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



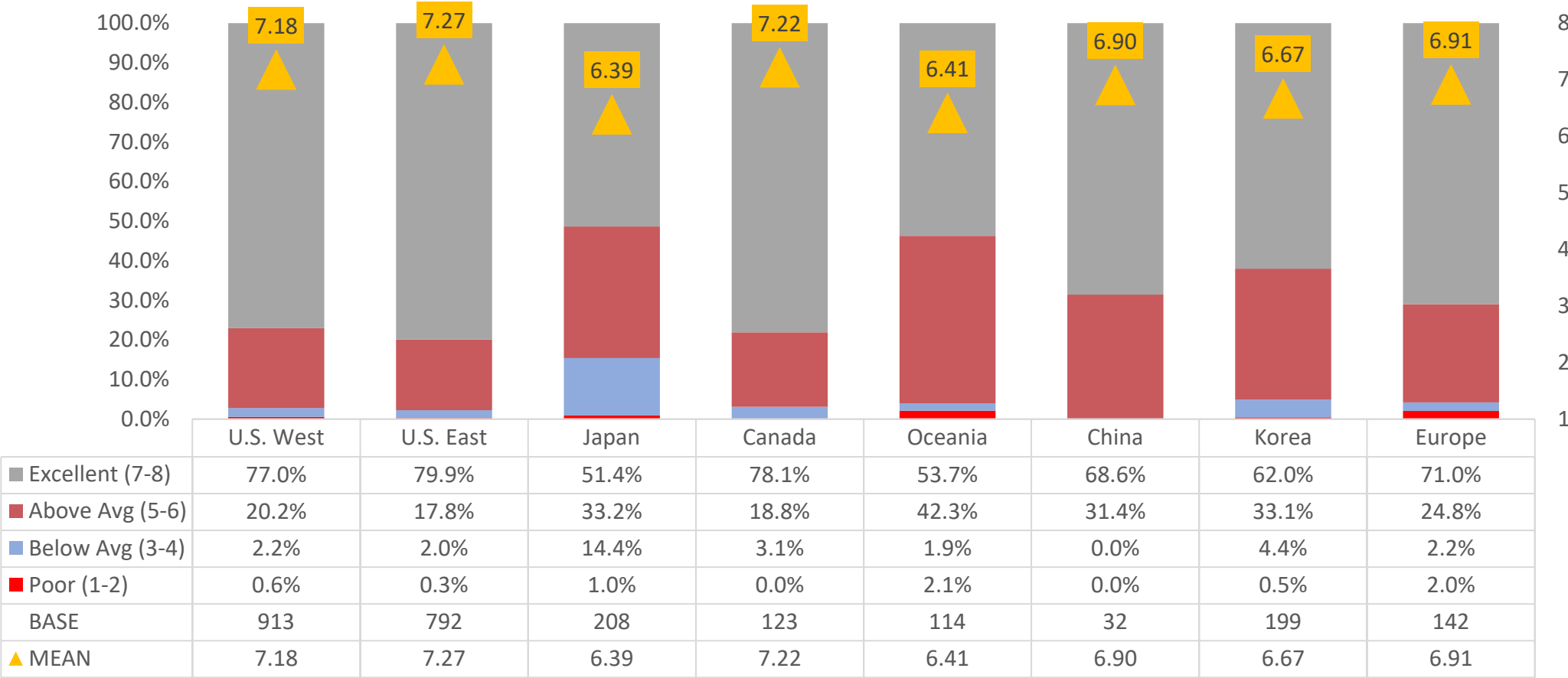
AIRPORT - O'AHU

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



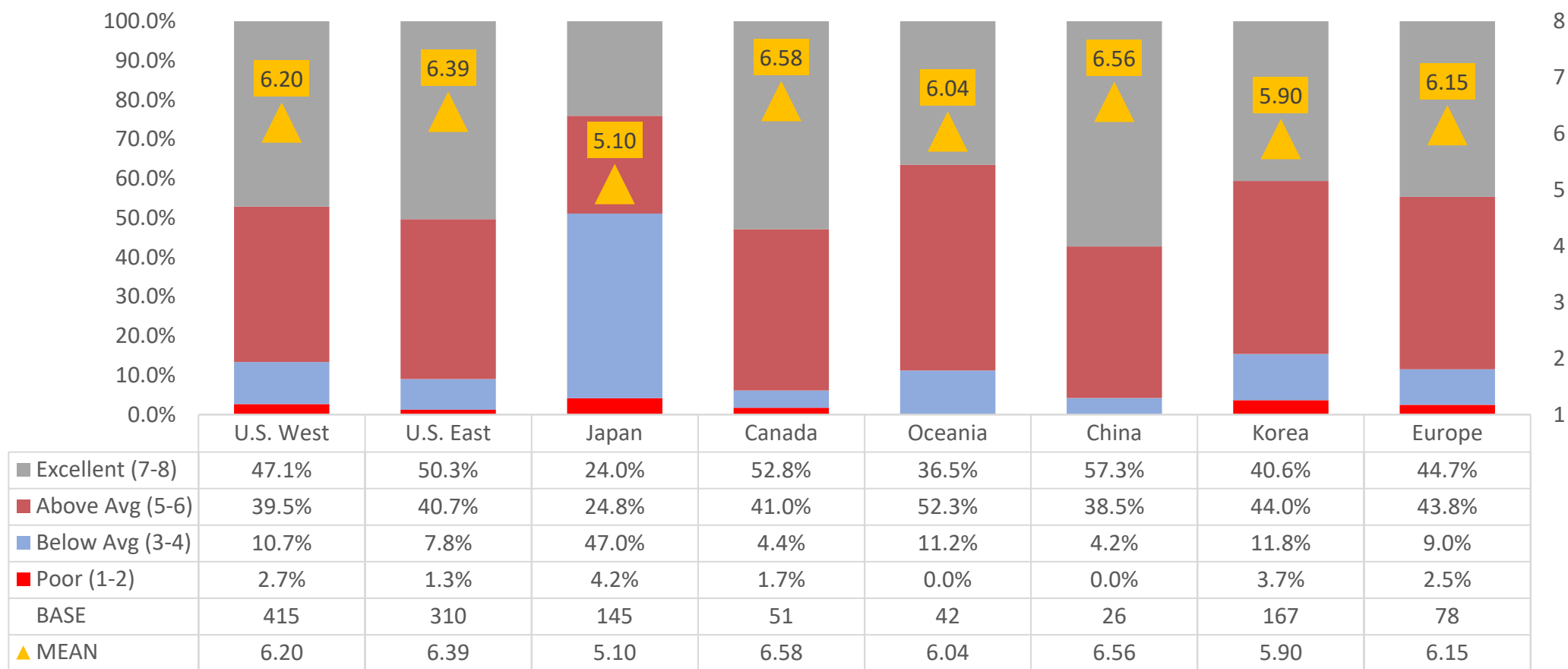
CULTURAL EXPERIENCES - O'AHU

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



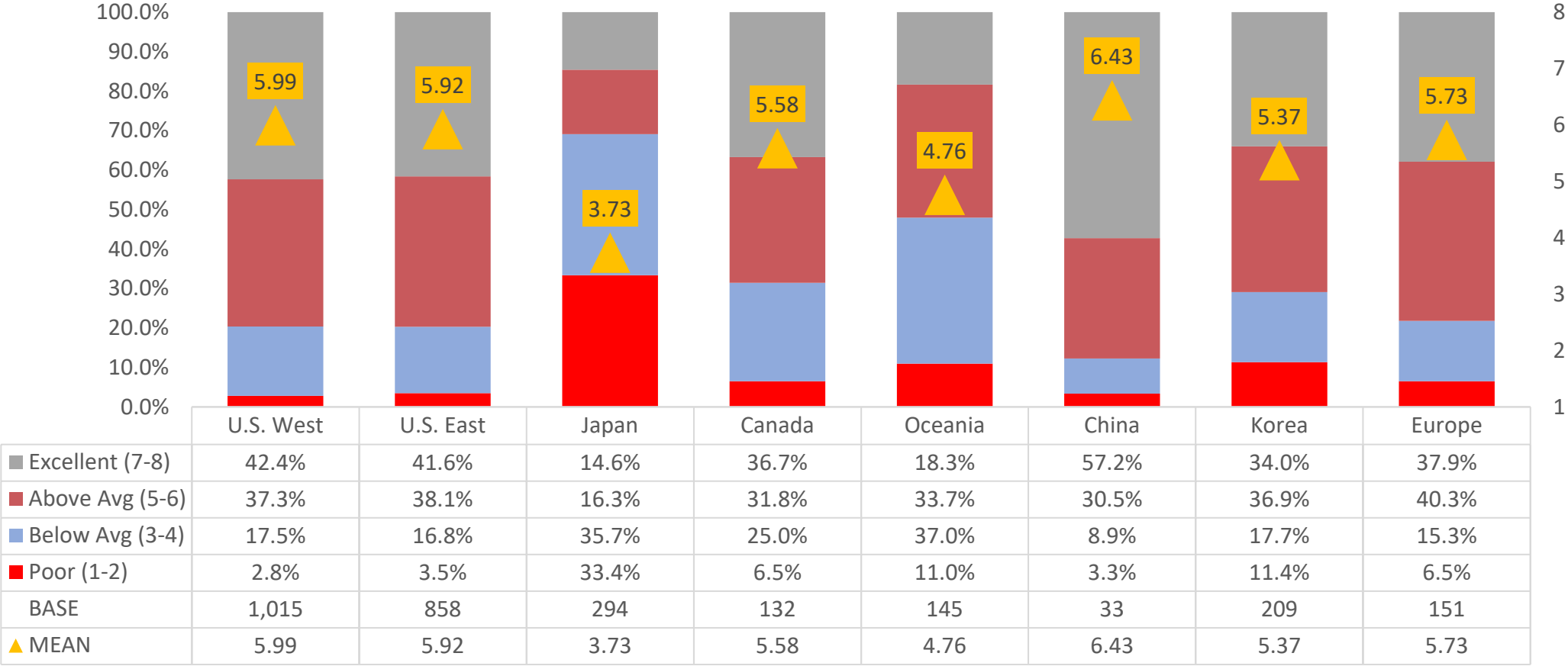
VOLUNTEER EXPERIENCES - O'AHU

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



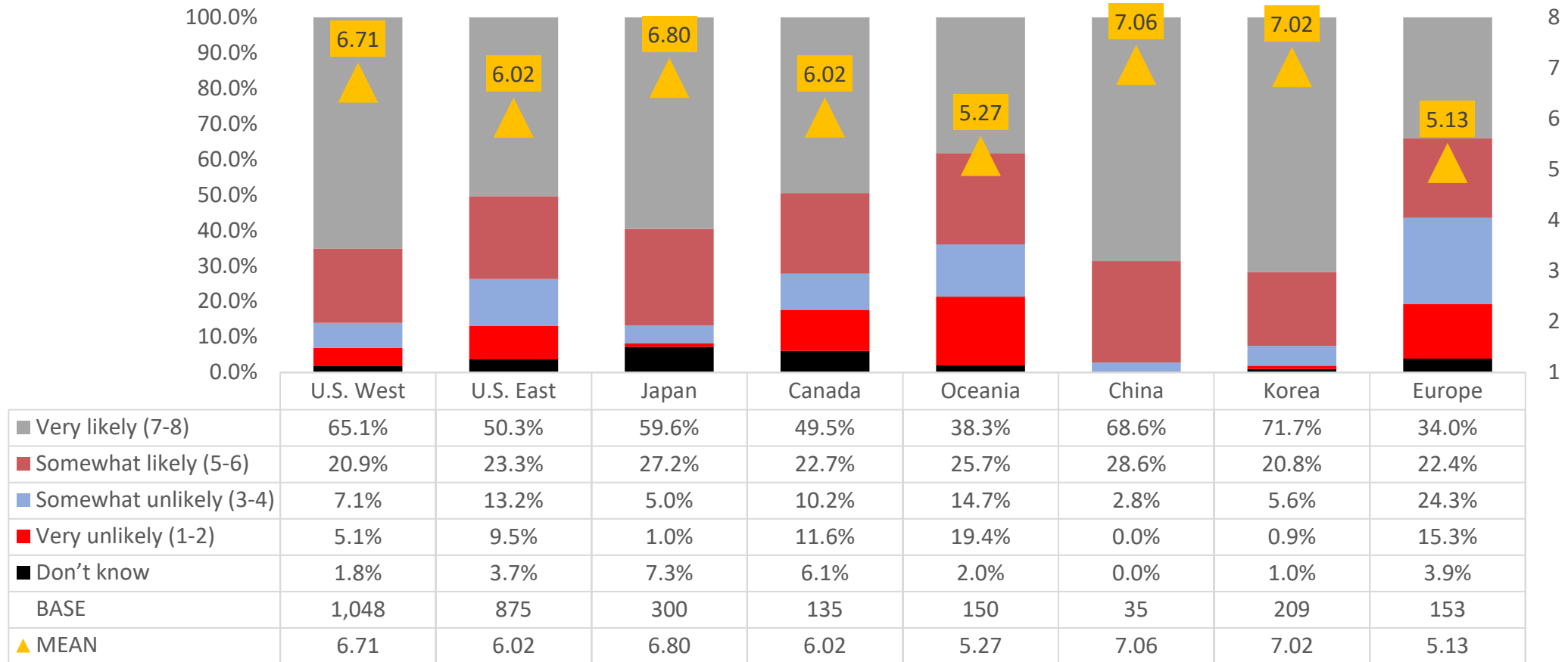
OVERALL VALUE FOR THE MONEY – O‘AHU

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



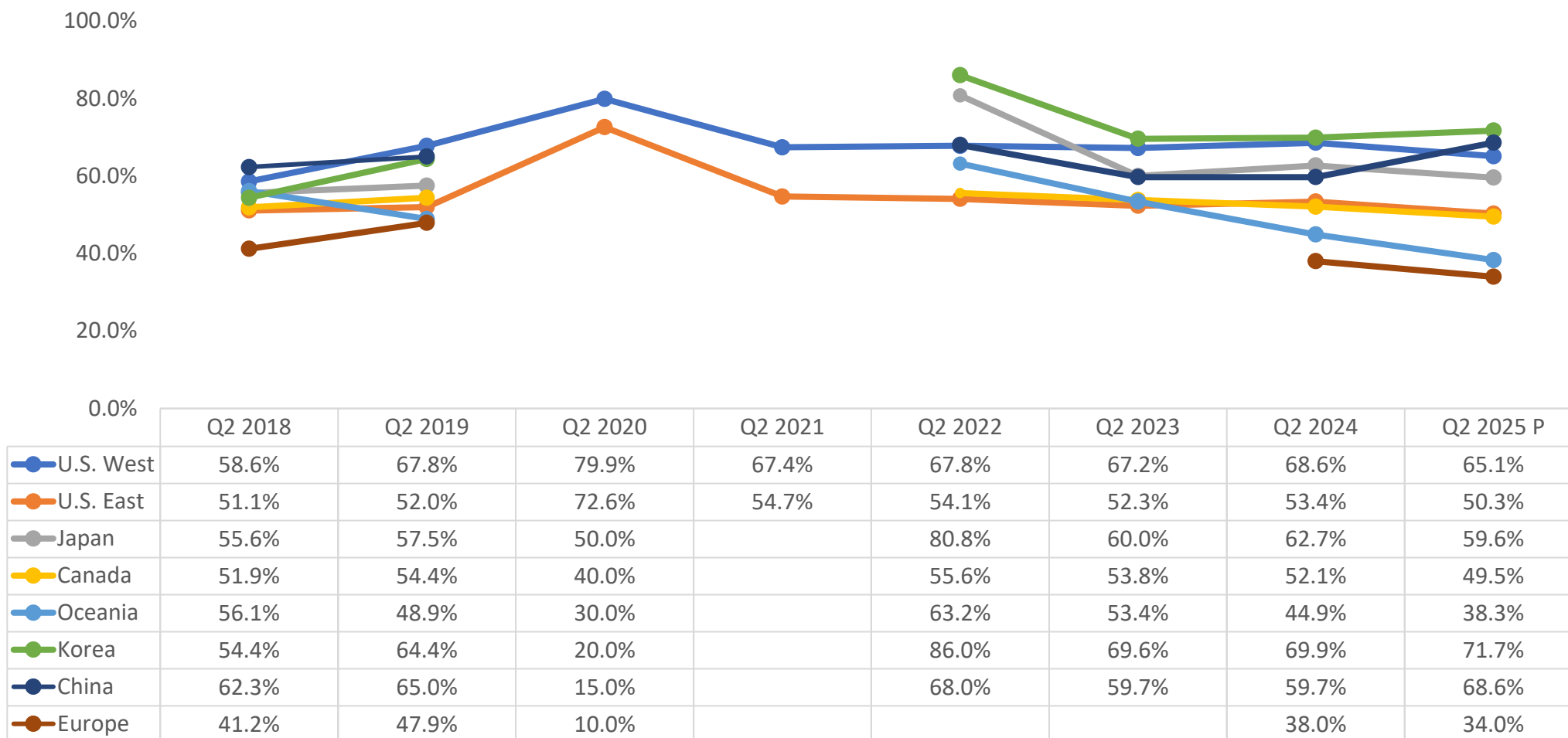
LIKELIHOOD OF RETURN VISIT - O‘AHU

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



LIKELIHOOD OF RETURN VISIT - O'AHU

TOP BOX - VERY LIKELY (7-8)

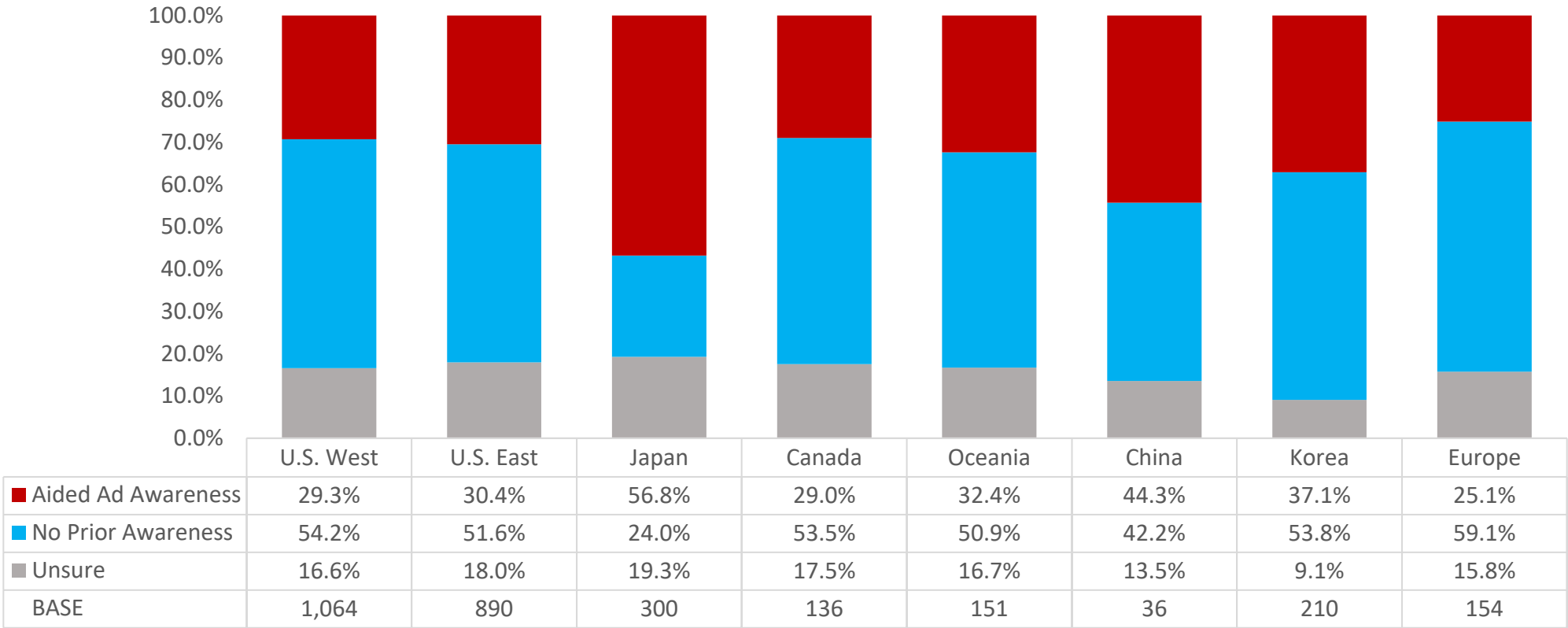


P= Preliminary Data

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. For Europe, the pandemic resulted in too few travelers in the second half of 2020. Visitors from Europe were not surveyed in 2021 through 2023.

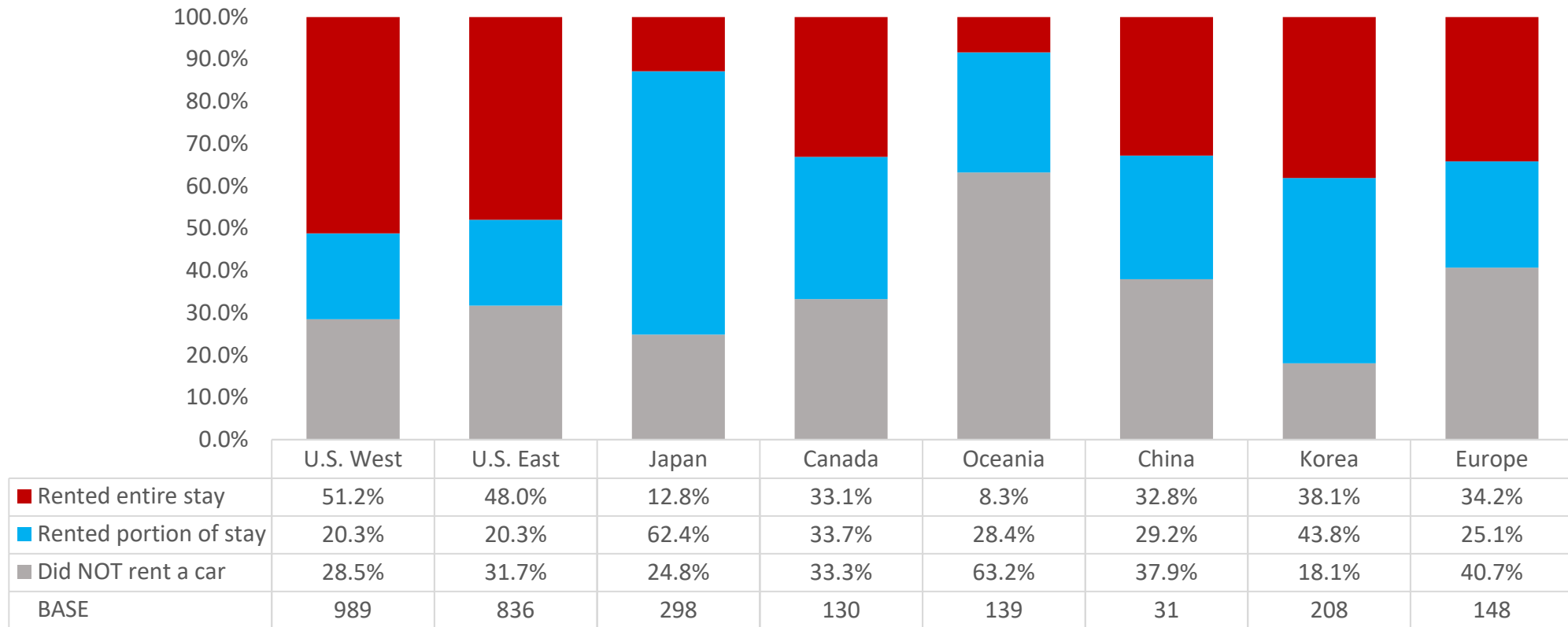
AIDED ADVERTISING AWARENESS - O‘AHU



MOTIVATING FACTORS – O‘AHU

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
Television programs or movies filmed in Hawai‘i	11.5%	14.3%	50.7%	22.0%	22.9%	16.6%	16.2%	32.3%
Hawaiian music	13.0%	10.3%	20.4%	11.3%	6.9%	14.2%	3.8%	15.6%
Social media posts and videos	17.3%	19.6%	42.6%	25.8%	17.1%	10.8%	28.8%	22.5%
Outdoor or sporting activities and events	12.4%	9.8%	7.7%	14.2%	7.9%	16.9%	20.1%	9.3%
Hawaiian cultural experience and Hawaiian cultural events	25.7%	26.3%	14.4%	24.4%	12.9%	22.0%	11.8%	23.3%
Famous landmarks or imagery/ natural beauty (beaches, mountains, etc.)	42.7%	48.6%	40.7%	44.6%	46.4%	50.0%	55.5%	56.9%
Attend a festival or other event	8.3%	9.0%	10.0%	5.2%	1.1%	2.7%	2.0%	9.0%
BASE	1,062	889	300	136	151	36	210	153

CAR RENTAL - O'AHU

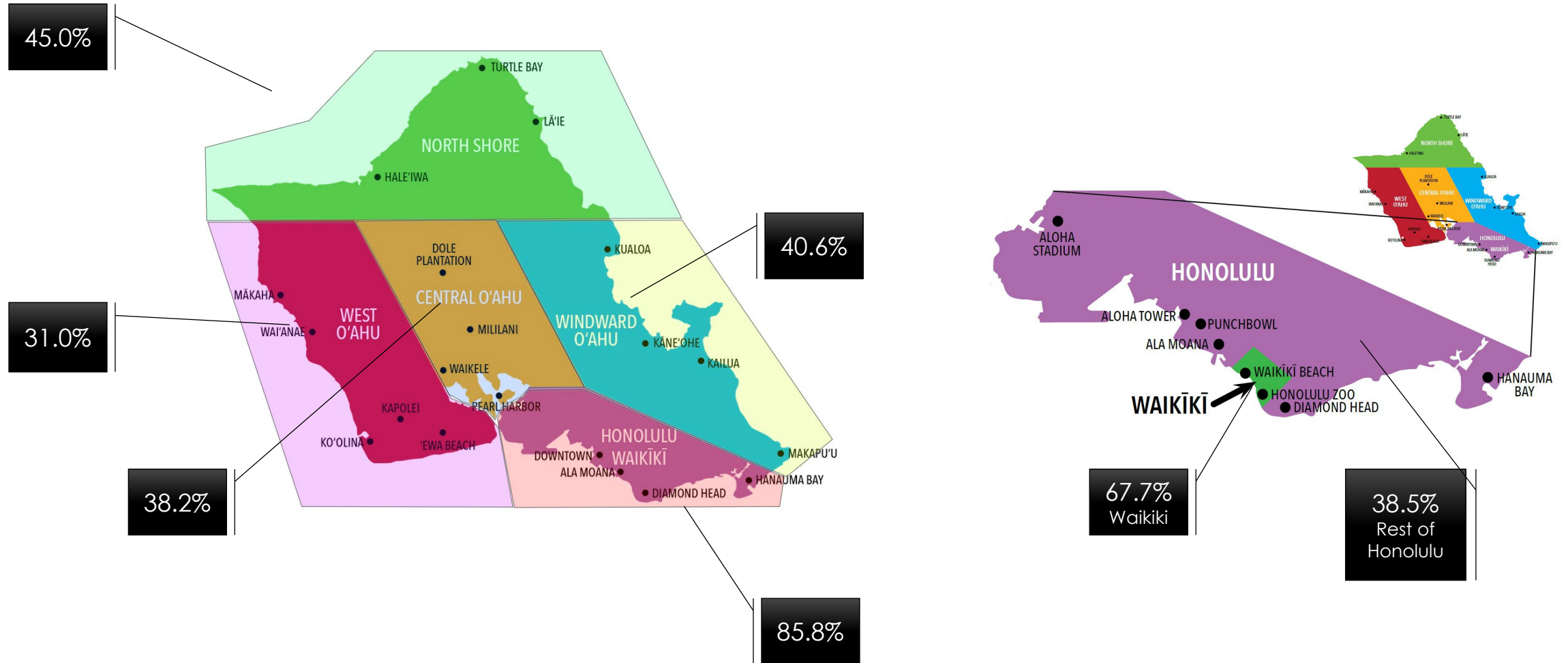


REASONS FOR PARTIAL RENTAL CAR - O'AHU

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
I only needed a vehicle on certain dates	77.7%	74.6%	84.9%	76.1%	79.5%	54.0%	61.5%	70.6%
Parking was too expensive at my hotel/ lodging	42.9%	39.1%	5.9%	28.1%	27.4%	33.8%	44.8%	21.4%
Car rental rates were too expensive	21.7%	21.9%	15.6%	26.0%	16.7%	10.8%	34.5%	19.3%
Wanted to reduce my carbon footprint	15.5%	10.0%	3.8%	8.4%	2.1%	23.0%	11.1%	13.3%
BASE	196	169	185	43	39	9	91	37

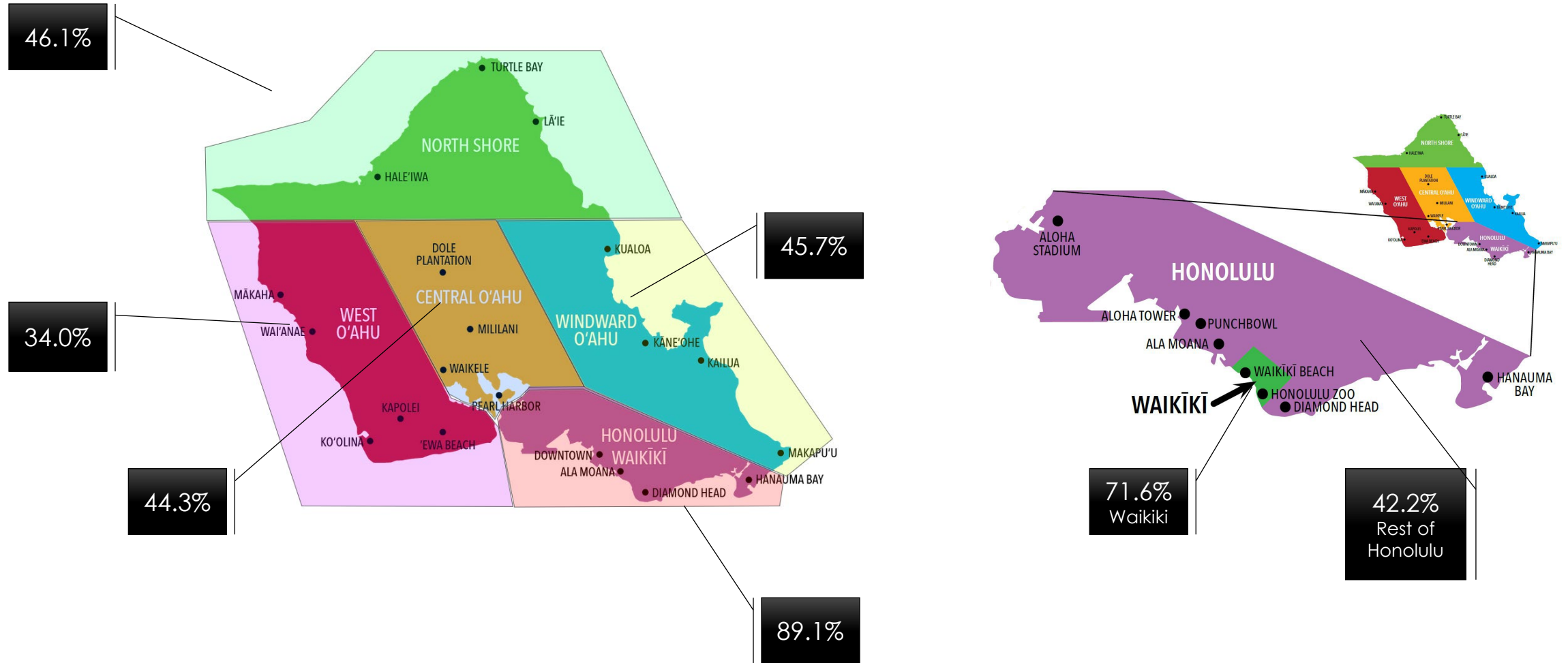
AREAS VISITED - O'AHU

U.S. WEST

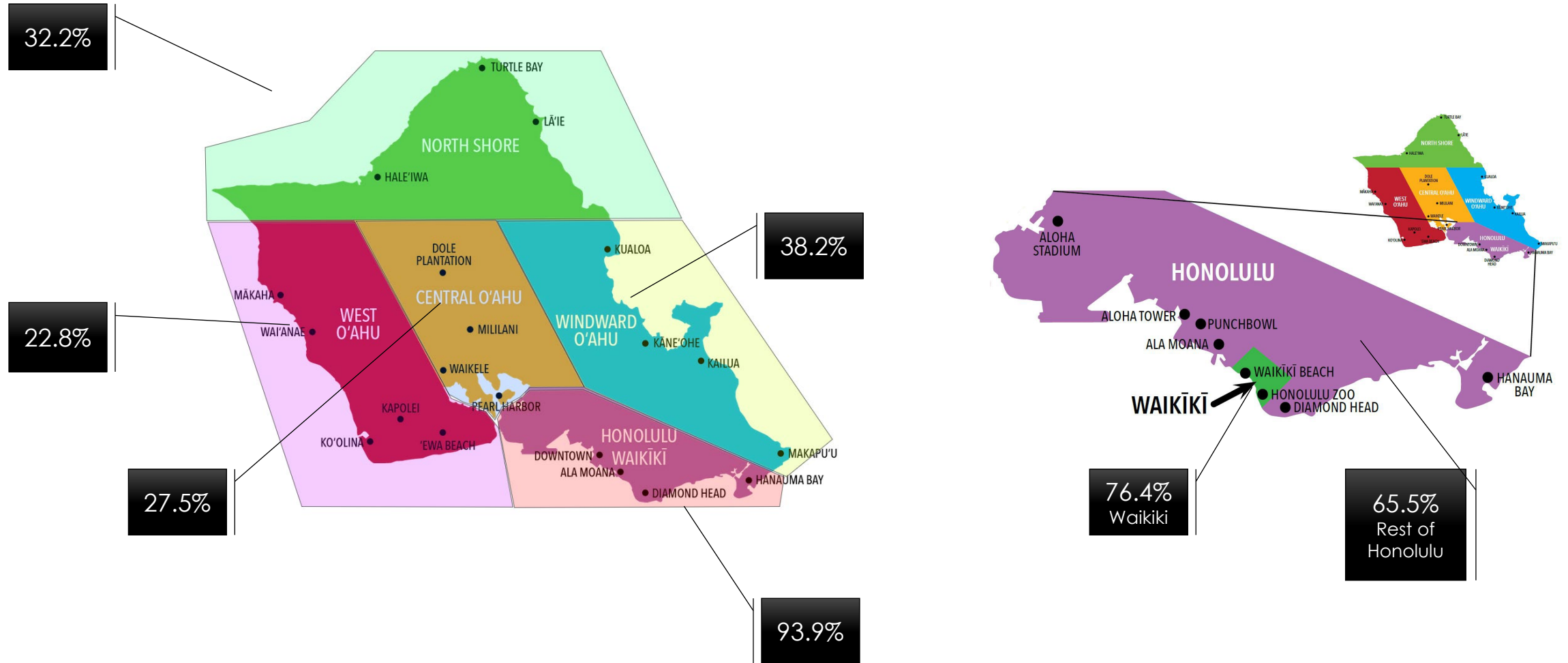


AREAS VISITED - O'AHU

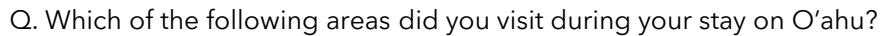
U.S. EAST



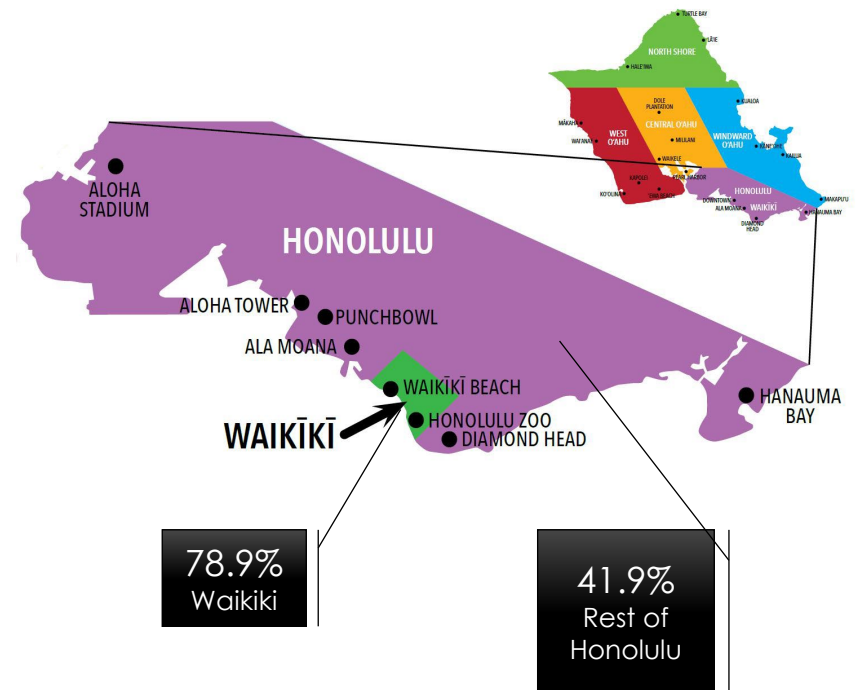
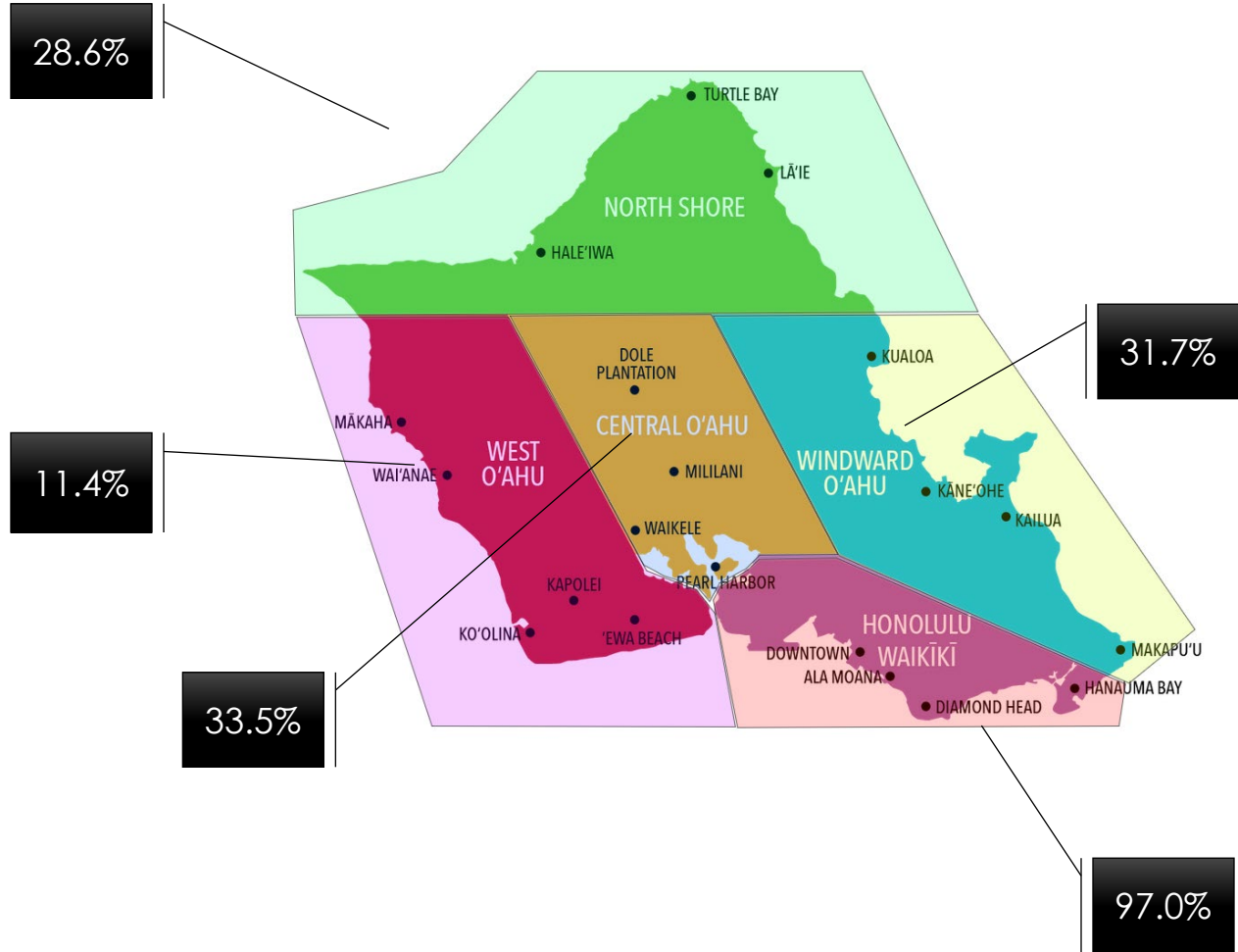
AREAS VISITED - O'AHU JAPAN



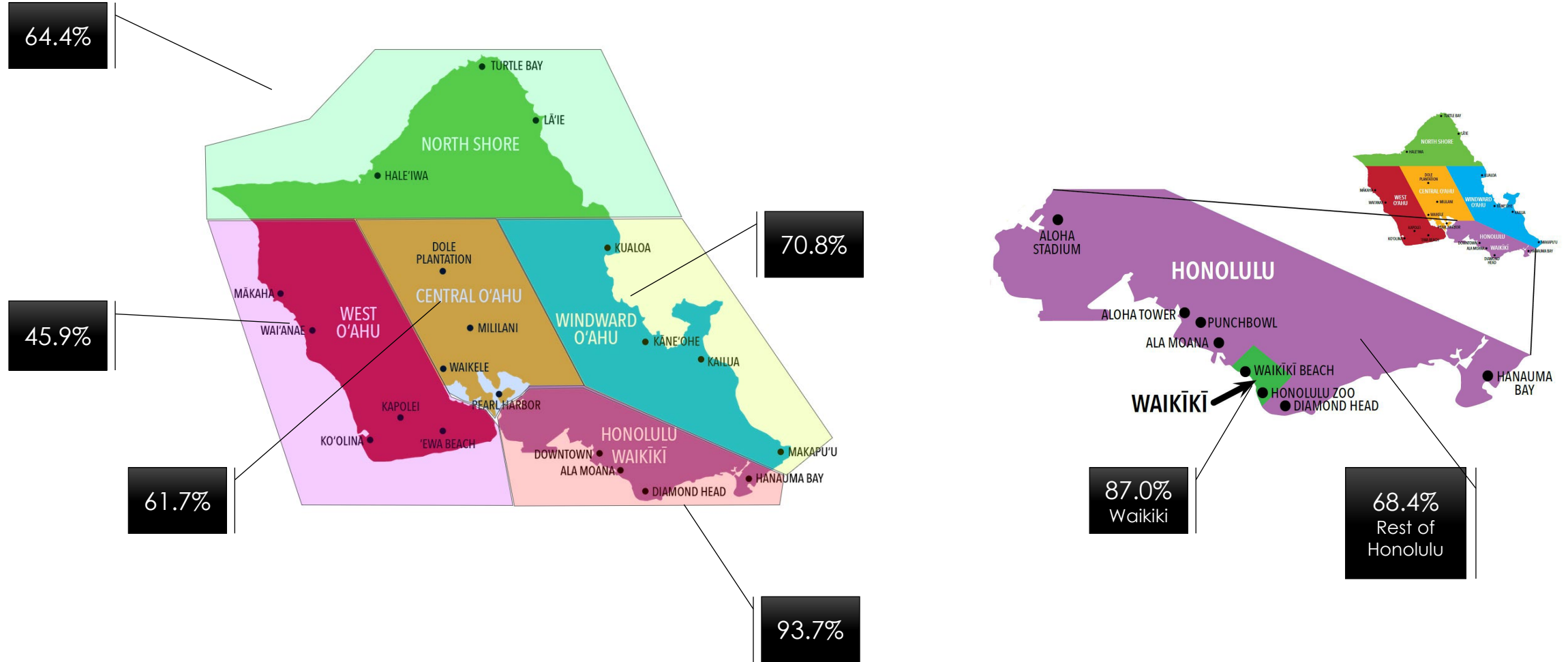
85



AREAS VISITED - O‘AHU OCEANIA

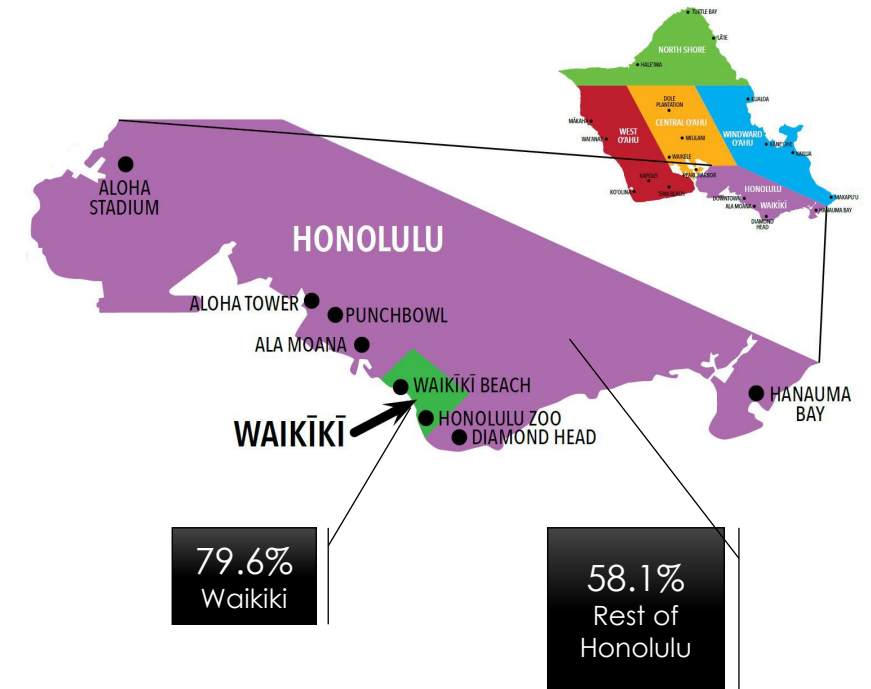
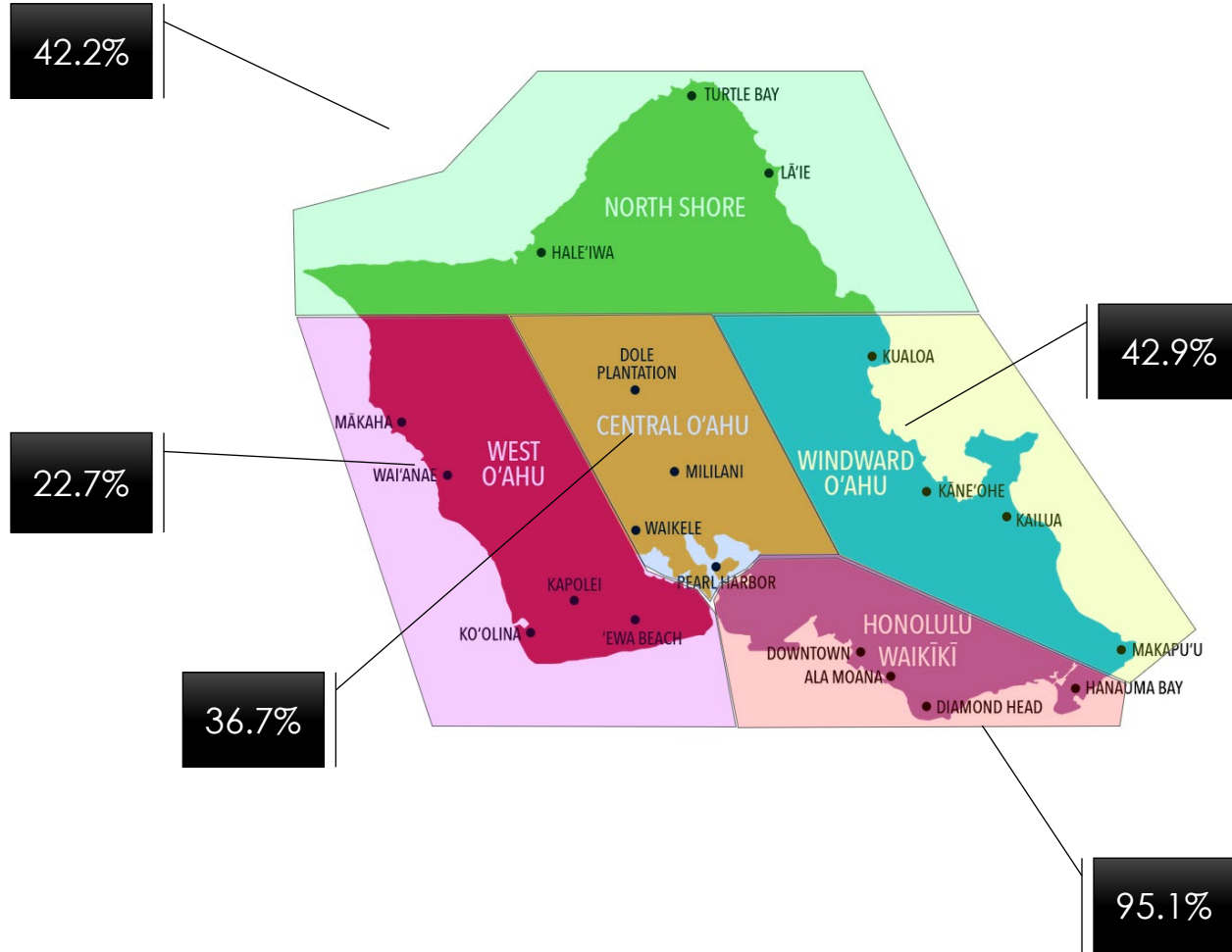


AREAS VISITED - O'AHU CHINA



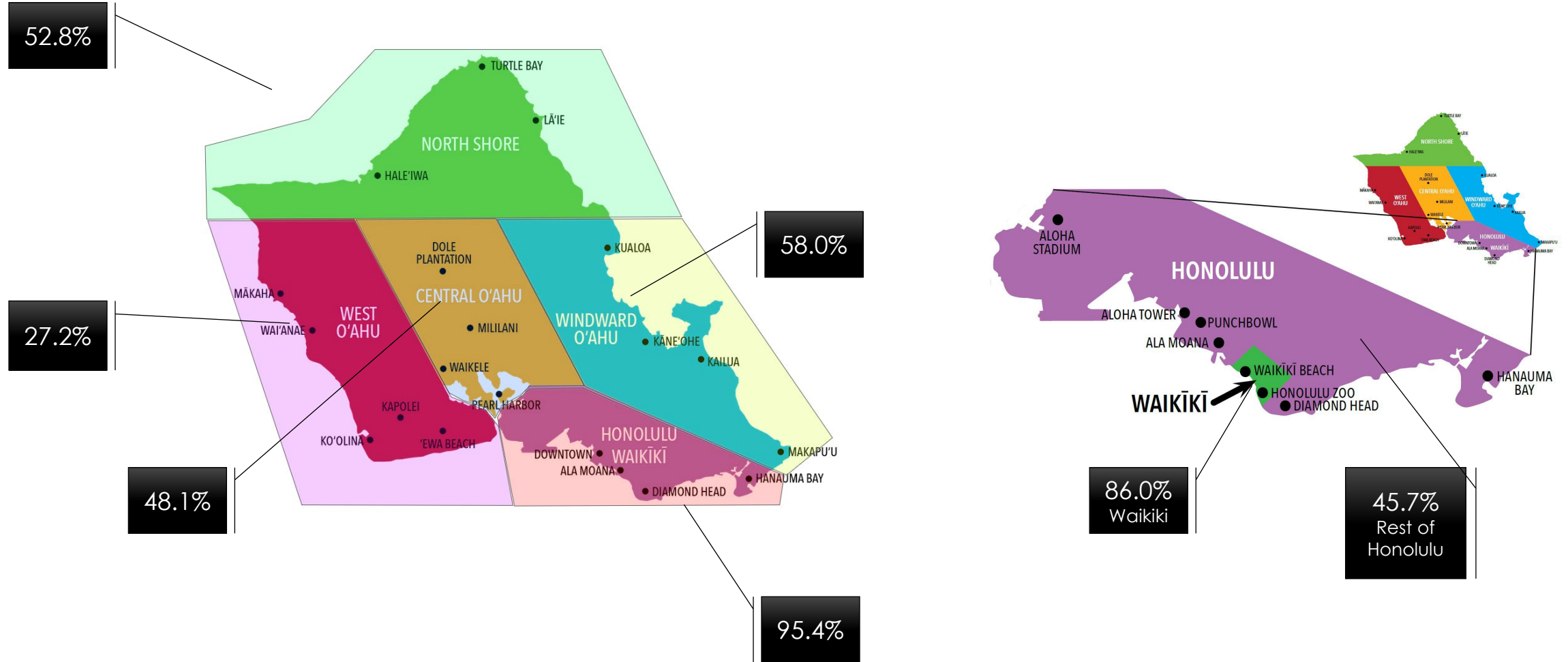
AREAS VISITED - O'AHU

KOREA



AREAS VISITED - O'AHU

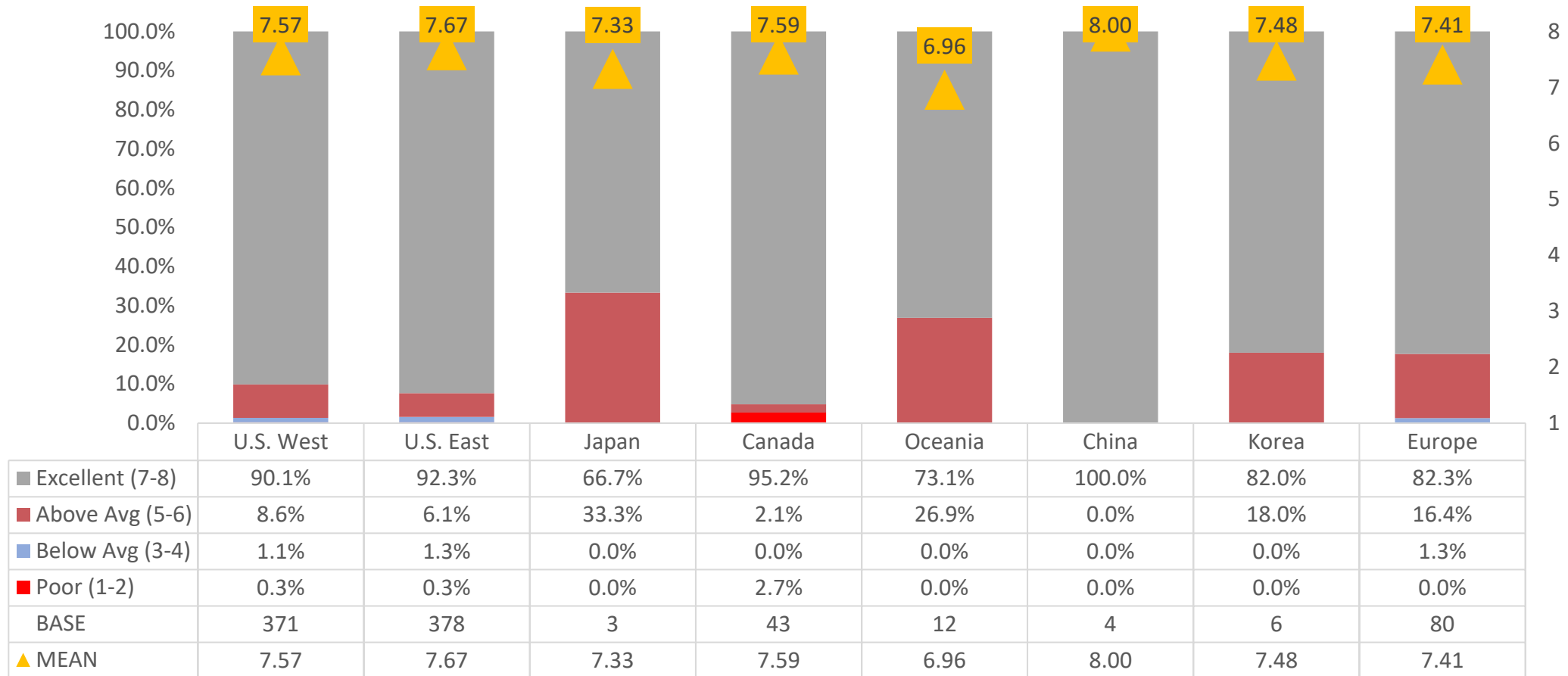
EUROPE



Section 8 – Kauaʻi

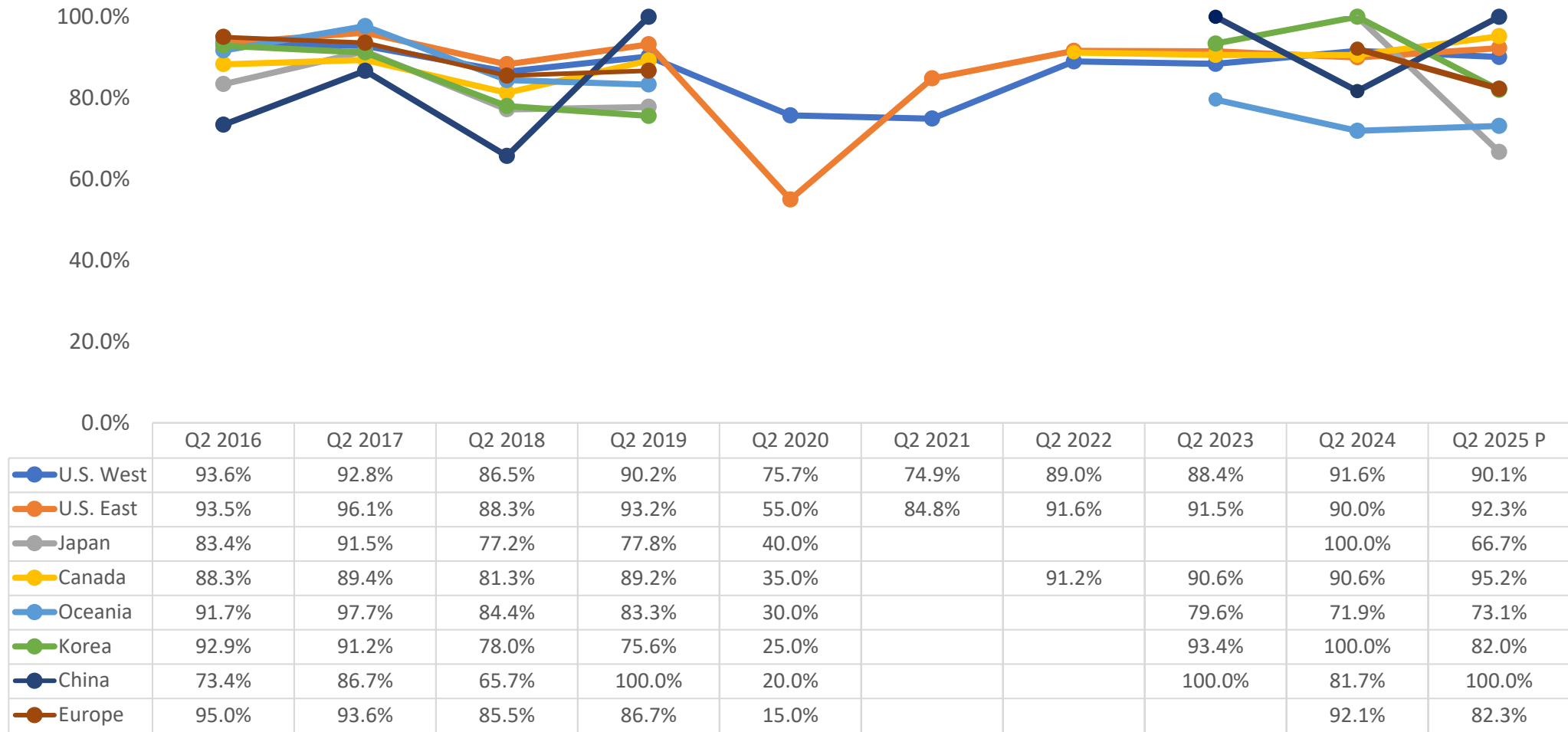
SATISFACTION - KAUA'I

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



SATISFACTION – KAUAI

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



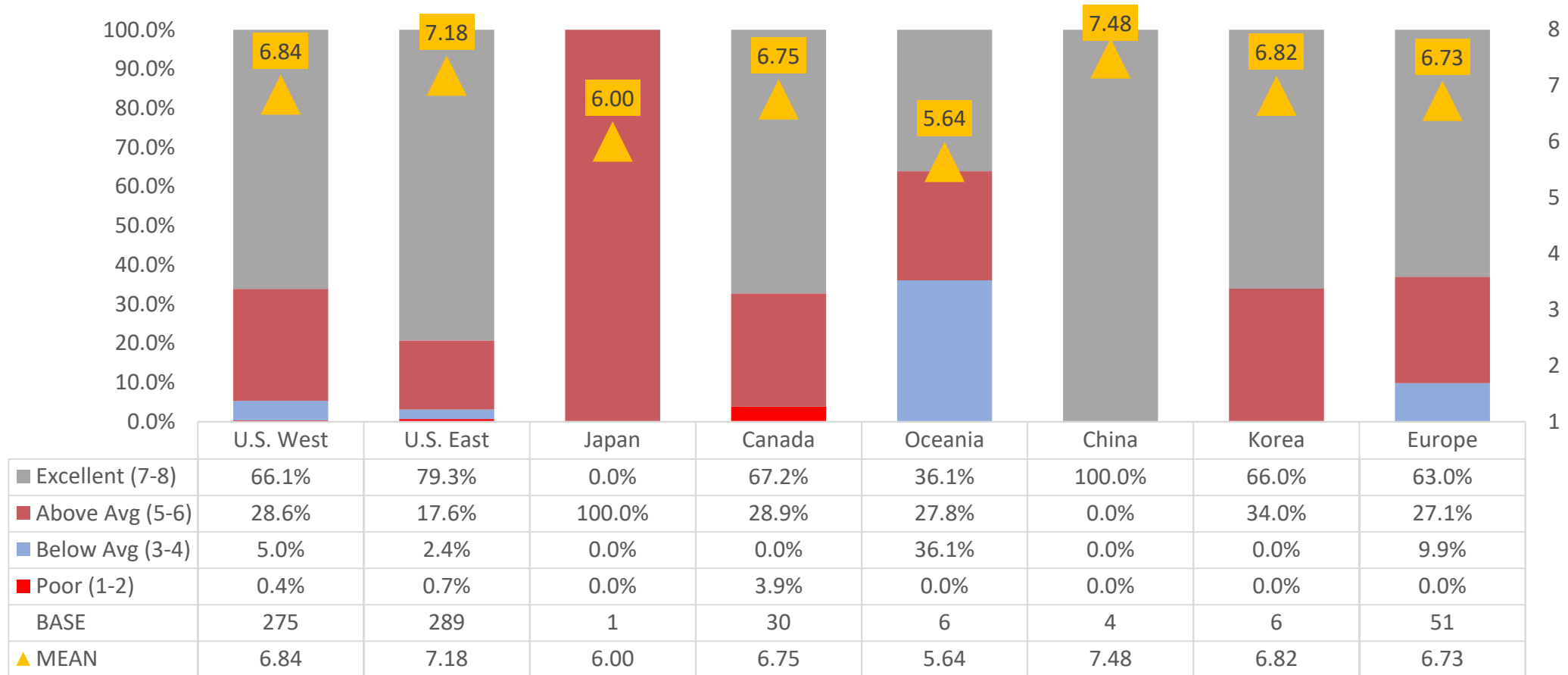
P= Preliminary Data

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. For Europe, the pandemic resulted in too few travelers in the second half of 2020. Visitors from Europe were not surveyed in 2021 through 2023.

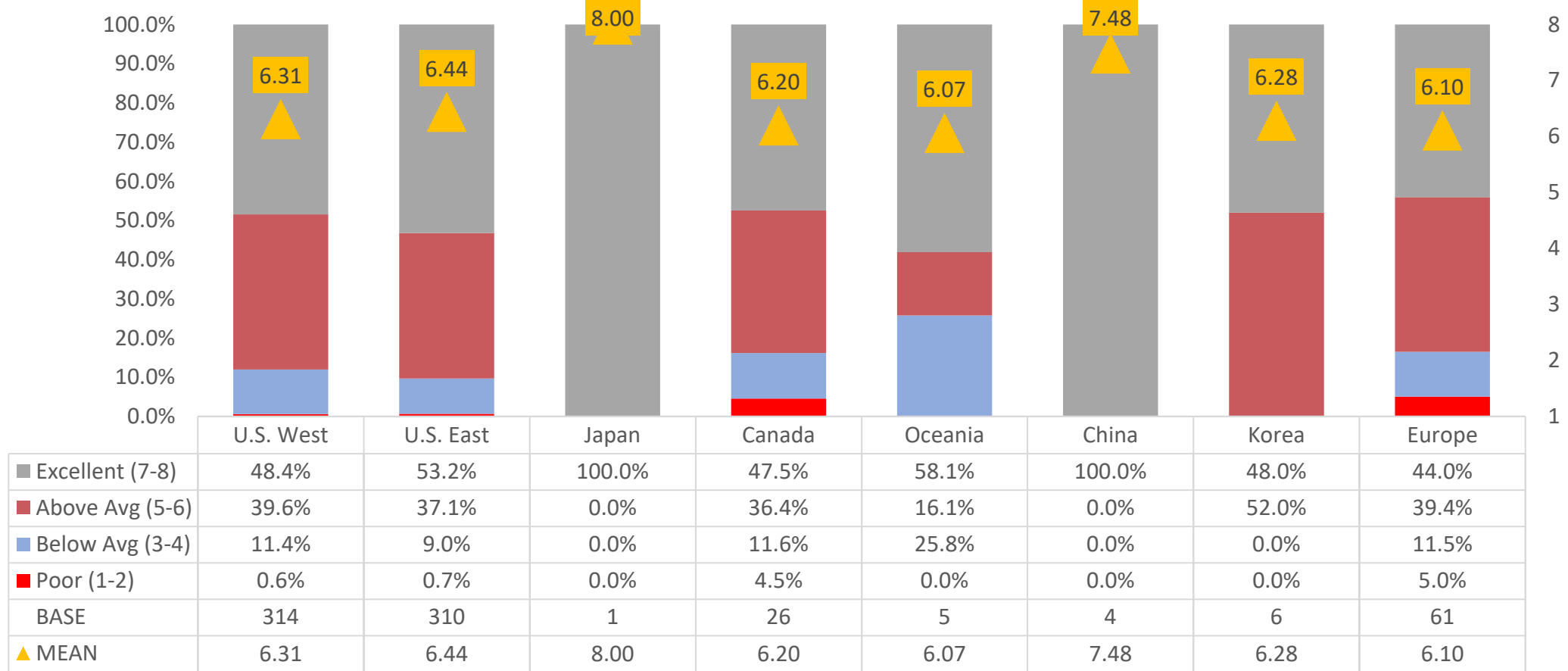
ENTERTAINMENT/ ATTRACTIONS – KAUA‘I

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



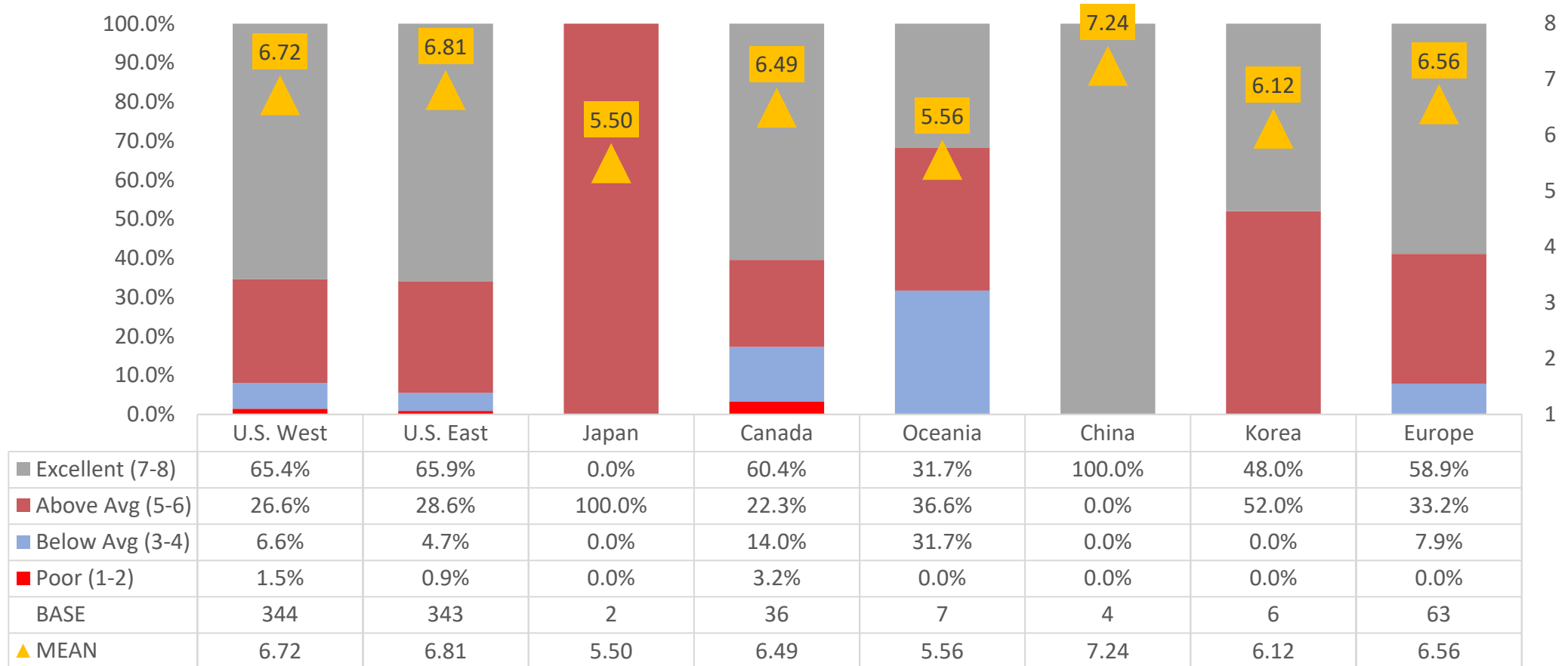
SHOPPING - KAUA'I

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



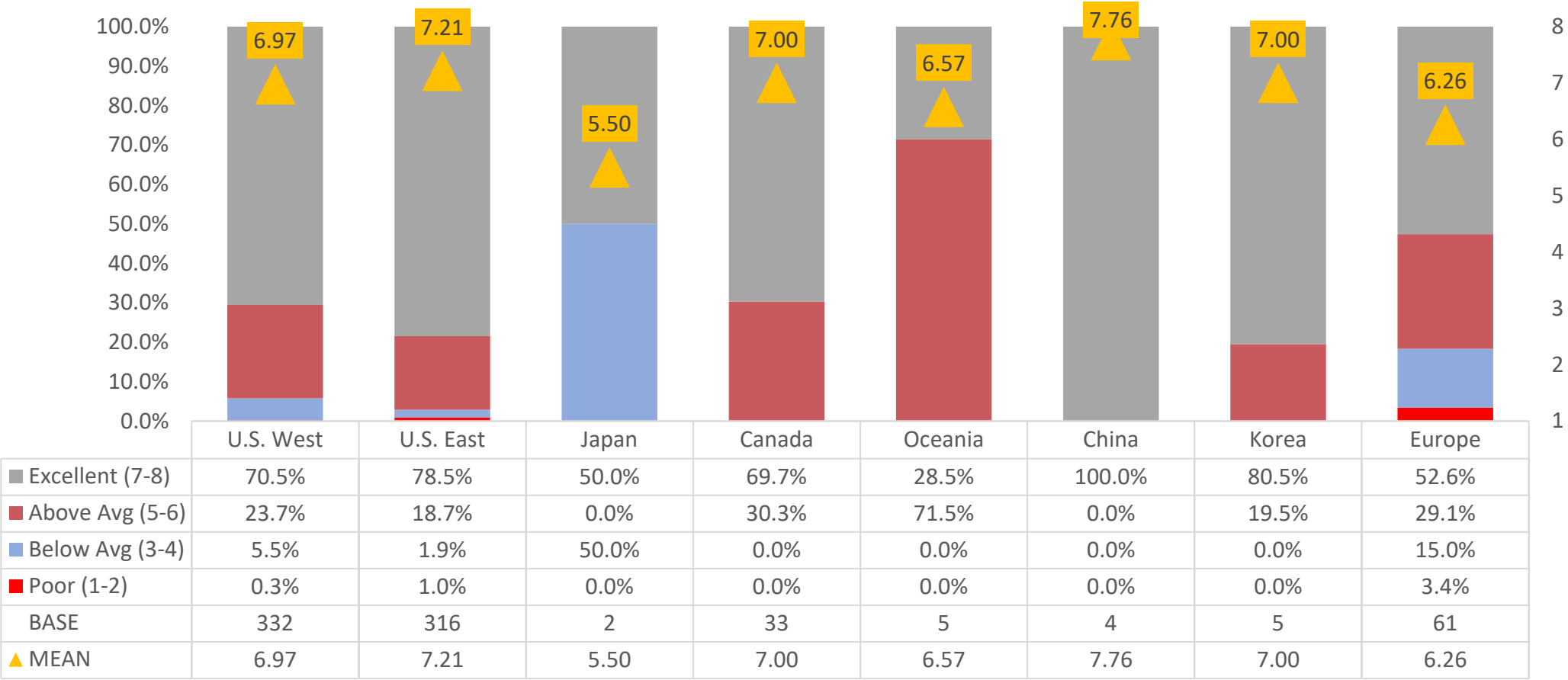
DINING/ FOOD & BEVERAGE – KAUA‘I

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



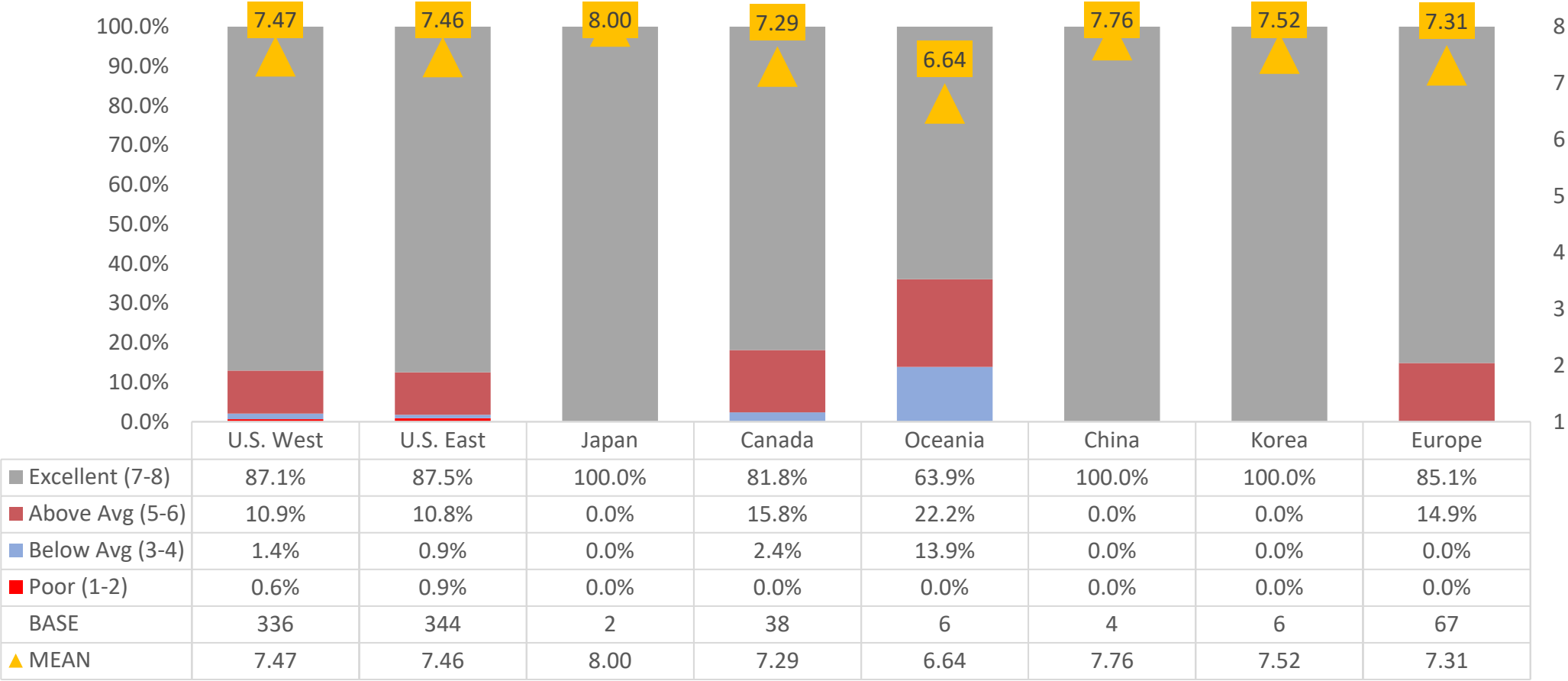
LODGING/ ACCOMMODATIONS – KAUA‘I

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



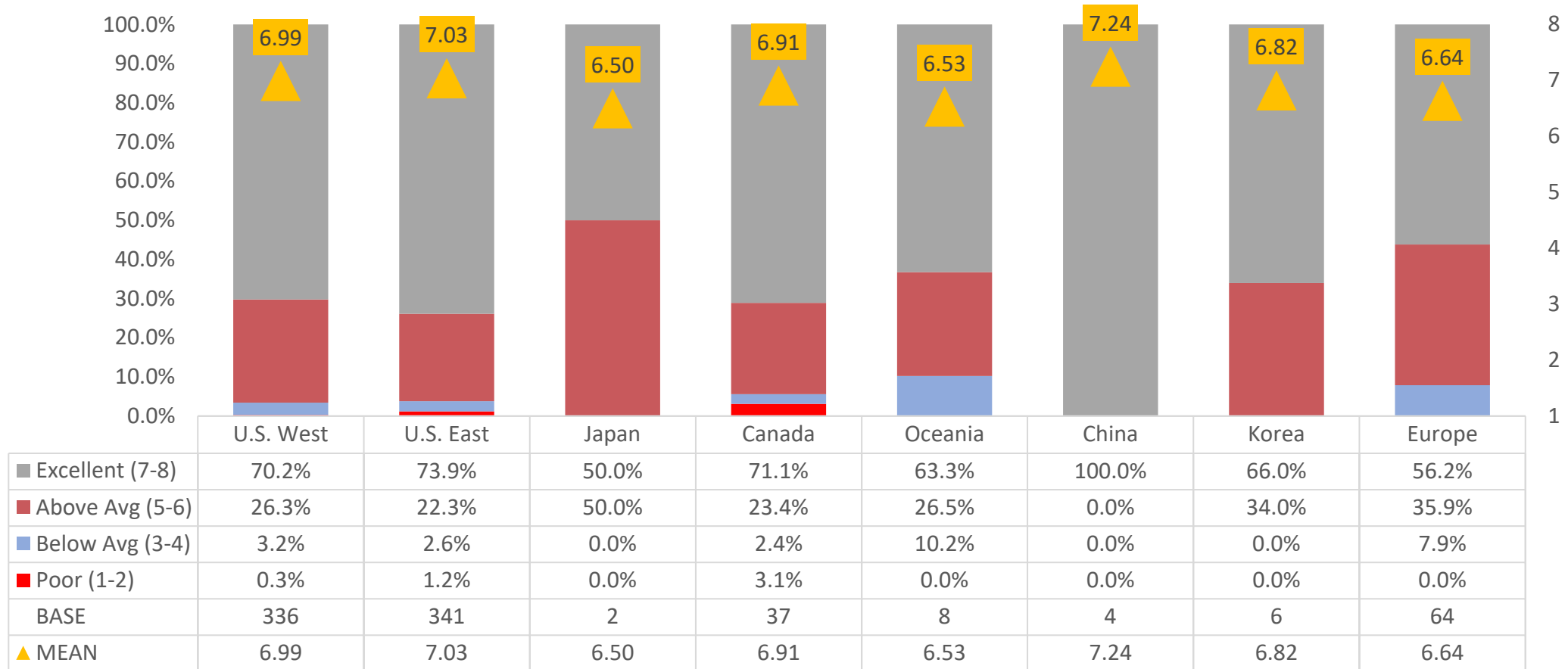
BEACHES - KAUA'I

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



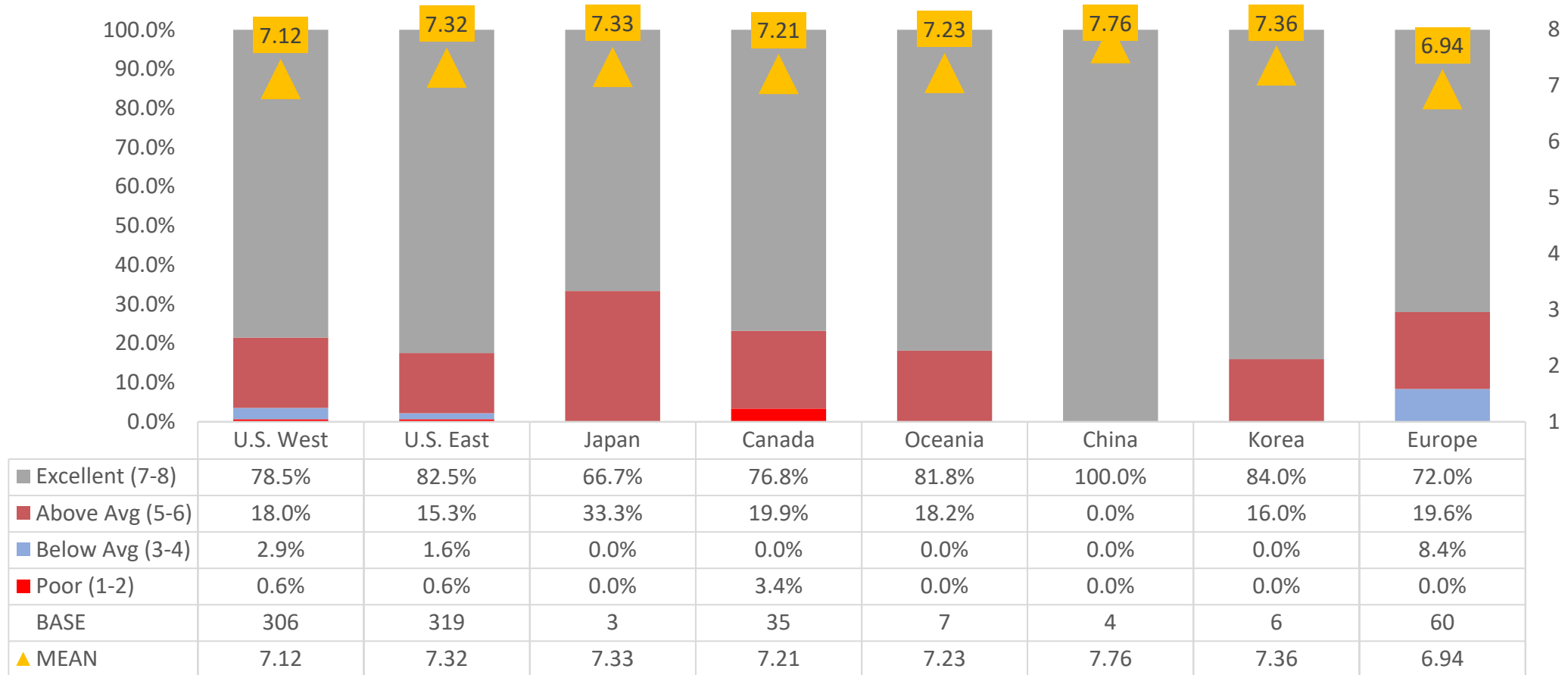
PUBLIC AREAS - KAUA'I

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



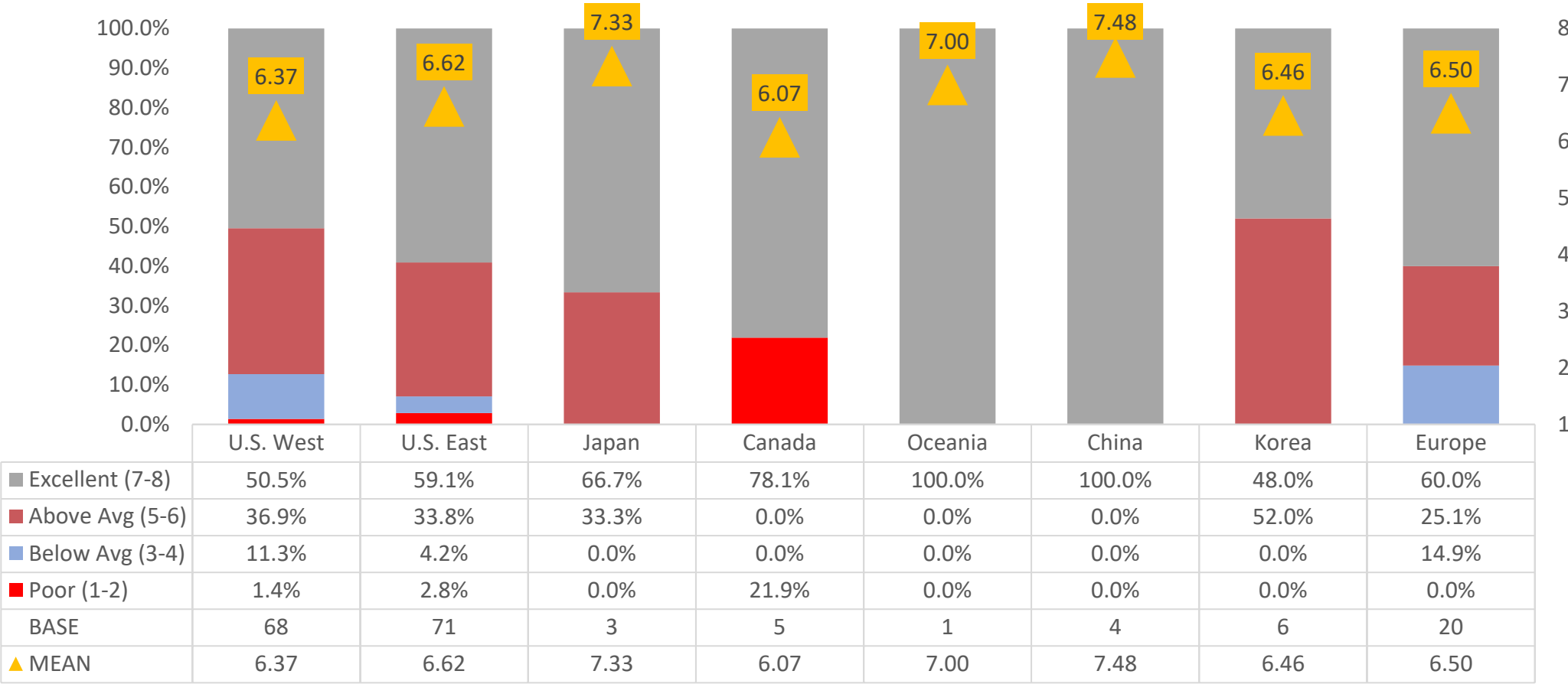
PARKS - KAUA'I

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



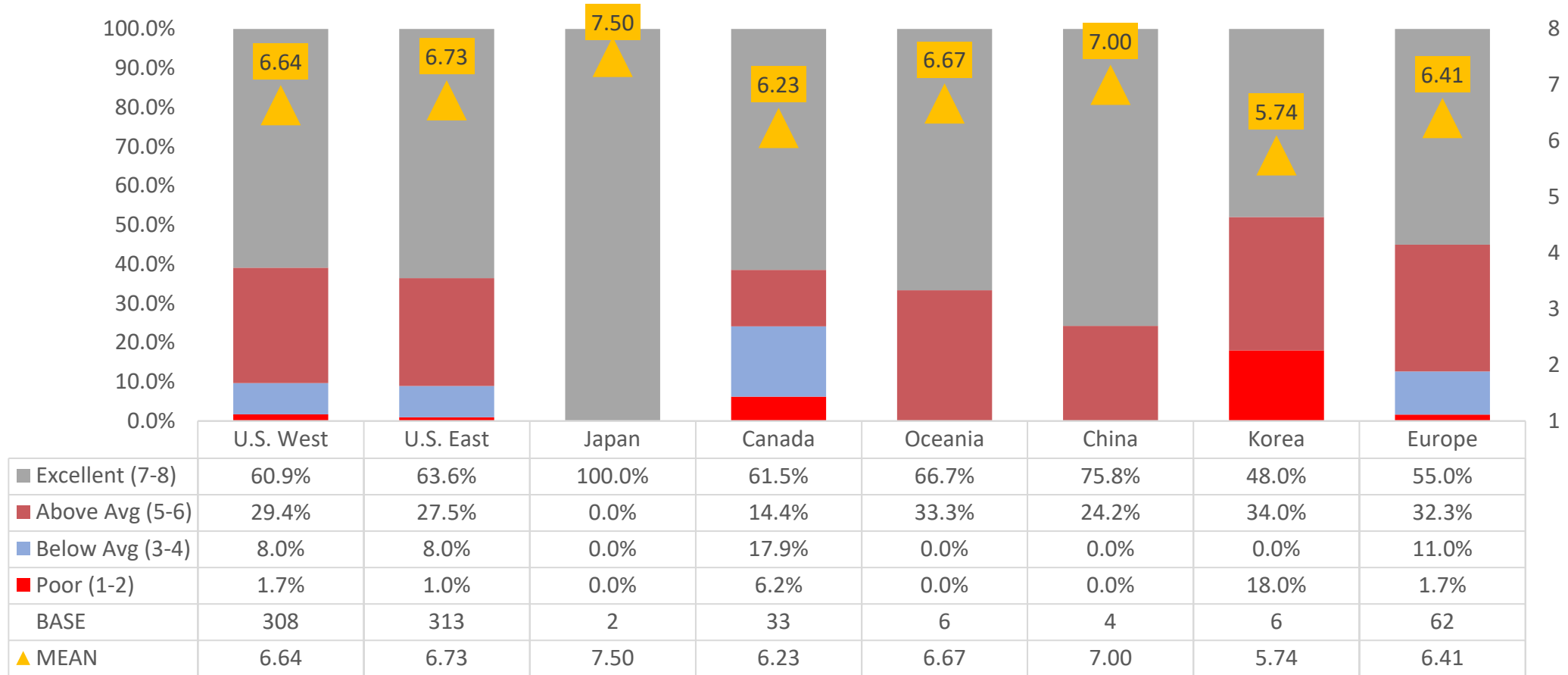
ROADS – KAUA‘I

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



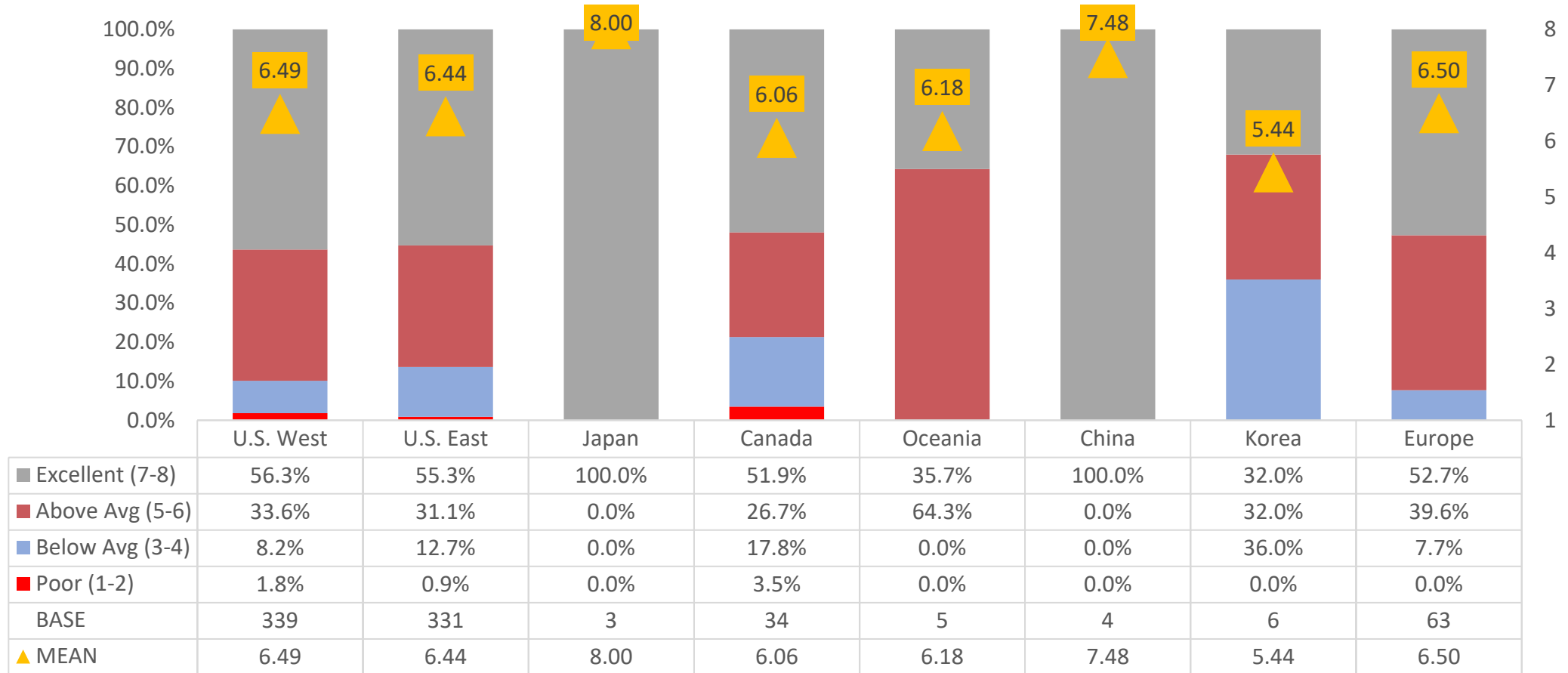
TRANSPORTATION ON ISLAND - KAUA'I

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



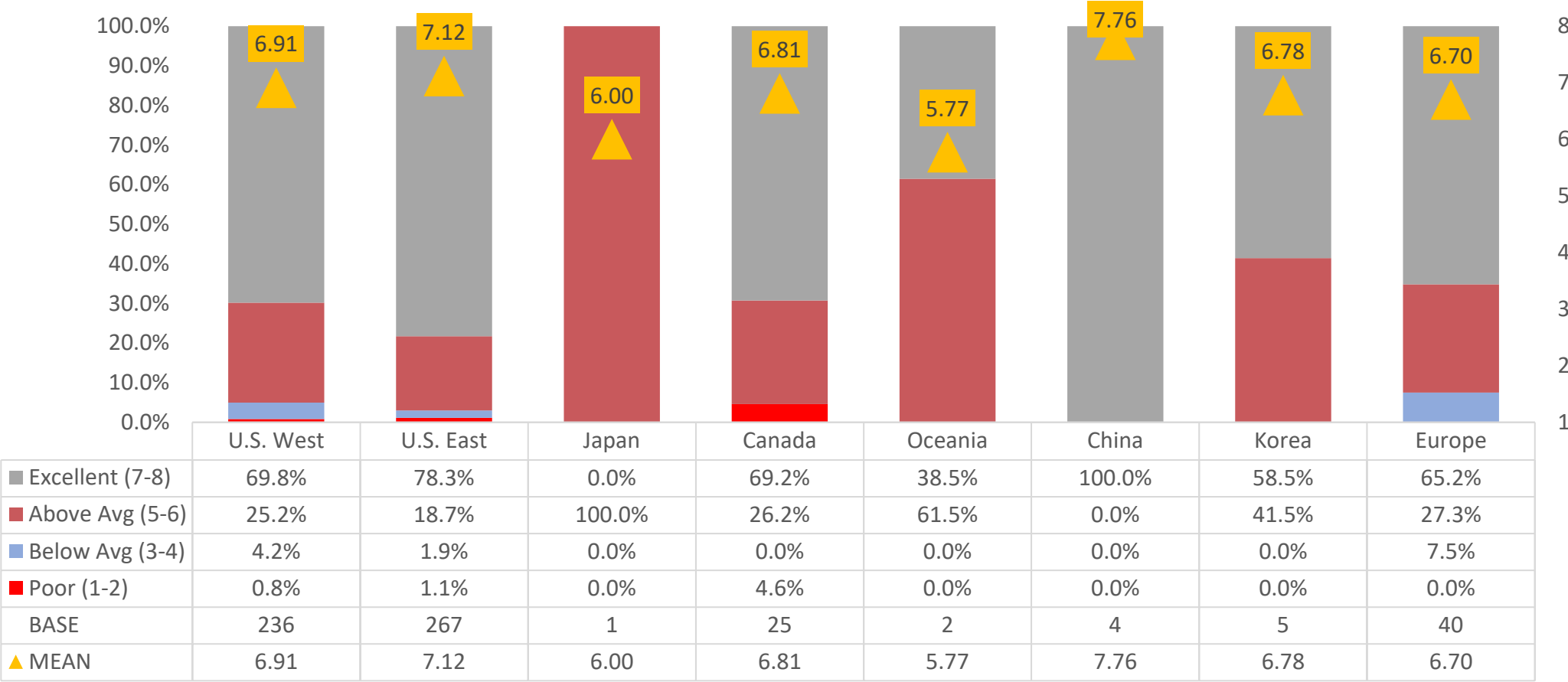
AIRPORT- KAUA'I

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



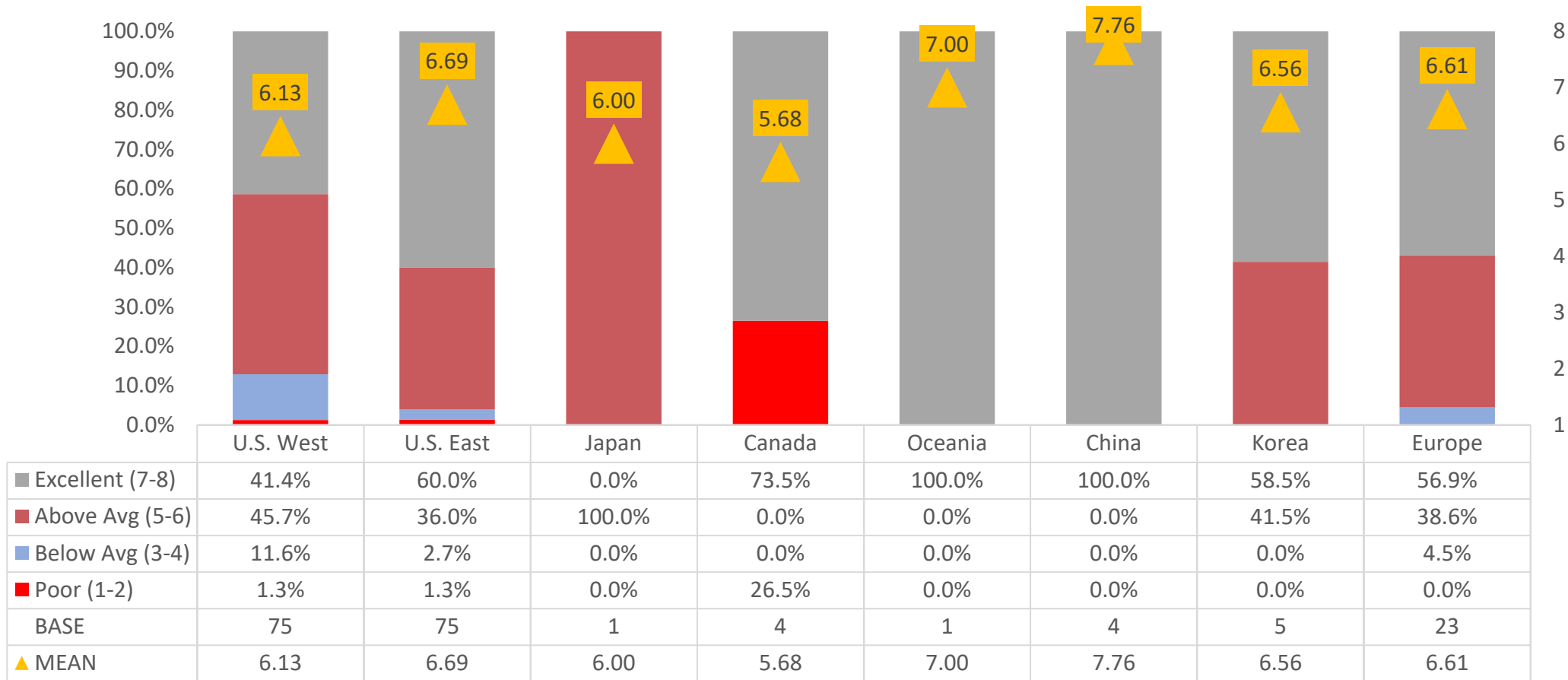
CULTURAL ACTIVITIES - KAUA'I

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



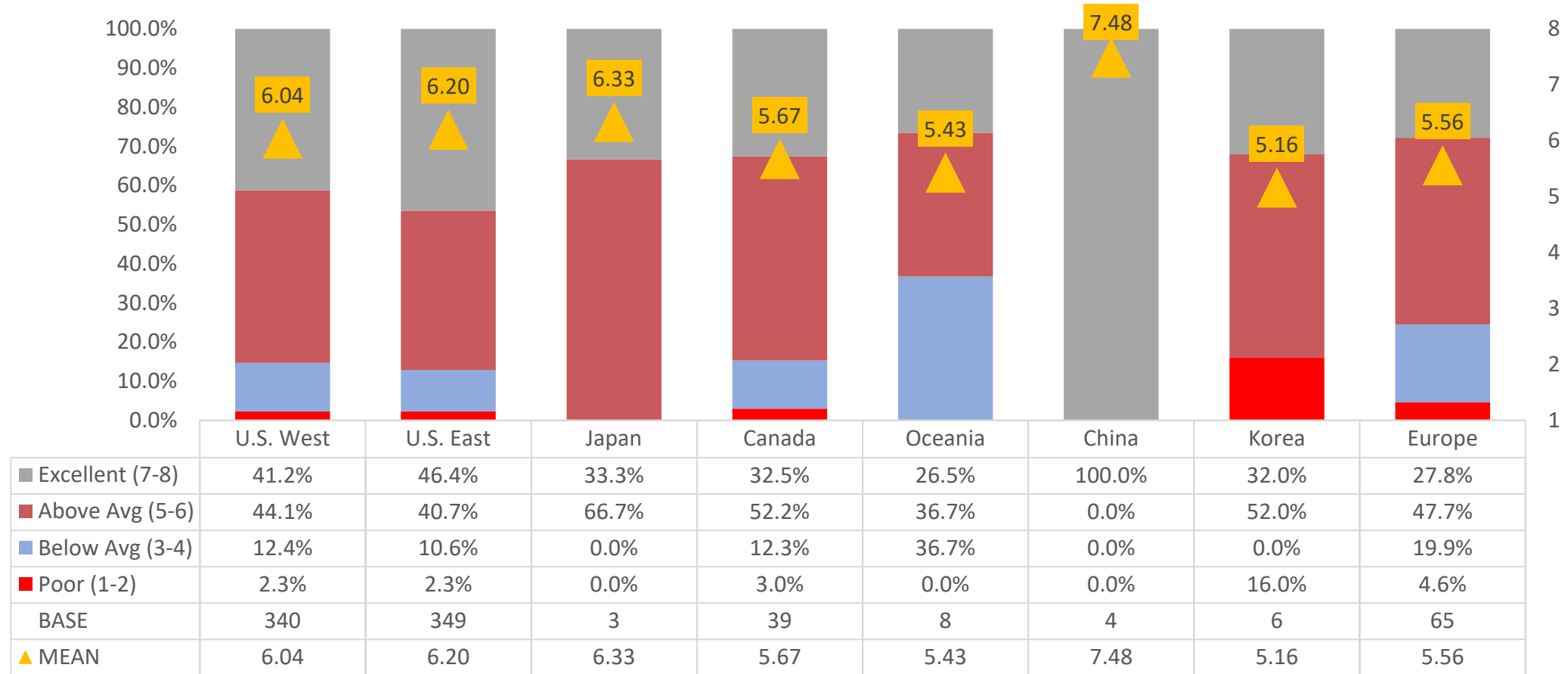
VOLUNTEER ACTIVITIES – KAUAI

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



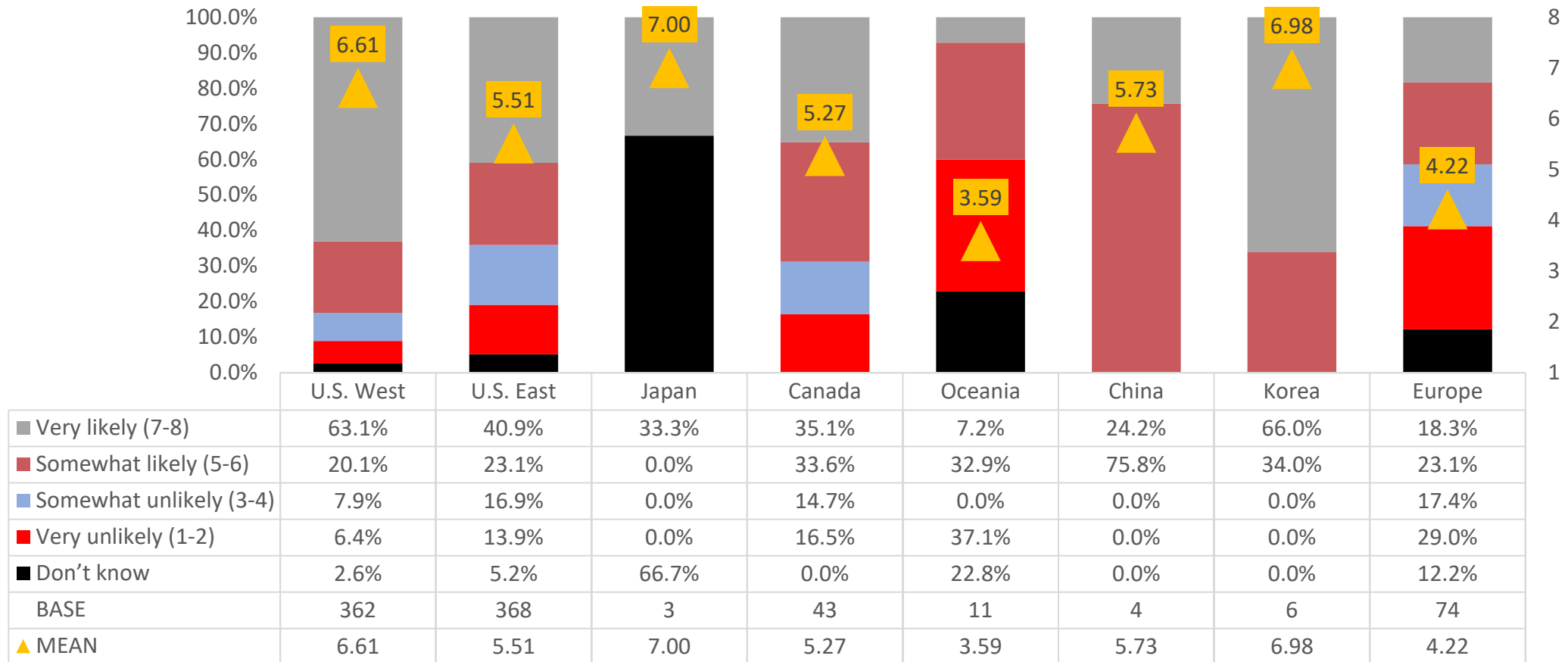
VALUE FOR THE MONEY – KAUA‘I

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	Q2 2025 P
U.S. West	53.4%	66.9%	83.1%	63.3%	67.7%	62.7%	69.0%	63.1%
U.S. East	34.8%	41.8%	55.0%	47.3%	40.7%	43.0%	40.7%	40.9%
Japan	75.8%	77.8%					75.0%	33.3%
Canada	42.1%	41.6%			48.3%	44.1%	47.1%	35.1%
Oceania	34.2%	23.8%				30.0%	21.2%	7.2%
Korea	45.1%	61.0%				53.5%	29.2%	66.0%
China	19.5%	50.0%				61.8%	40.9%	24.2%
Europe	25.9%	25.4%					26.4%	18.3%

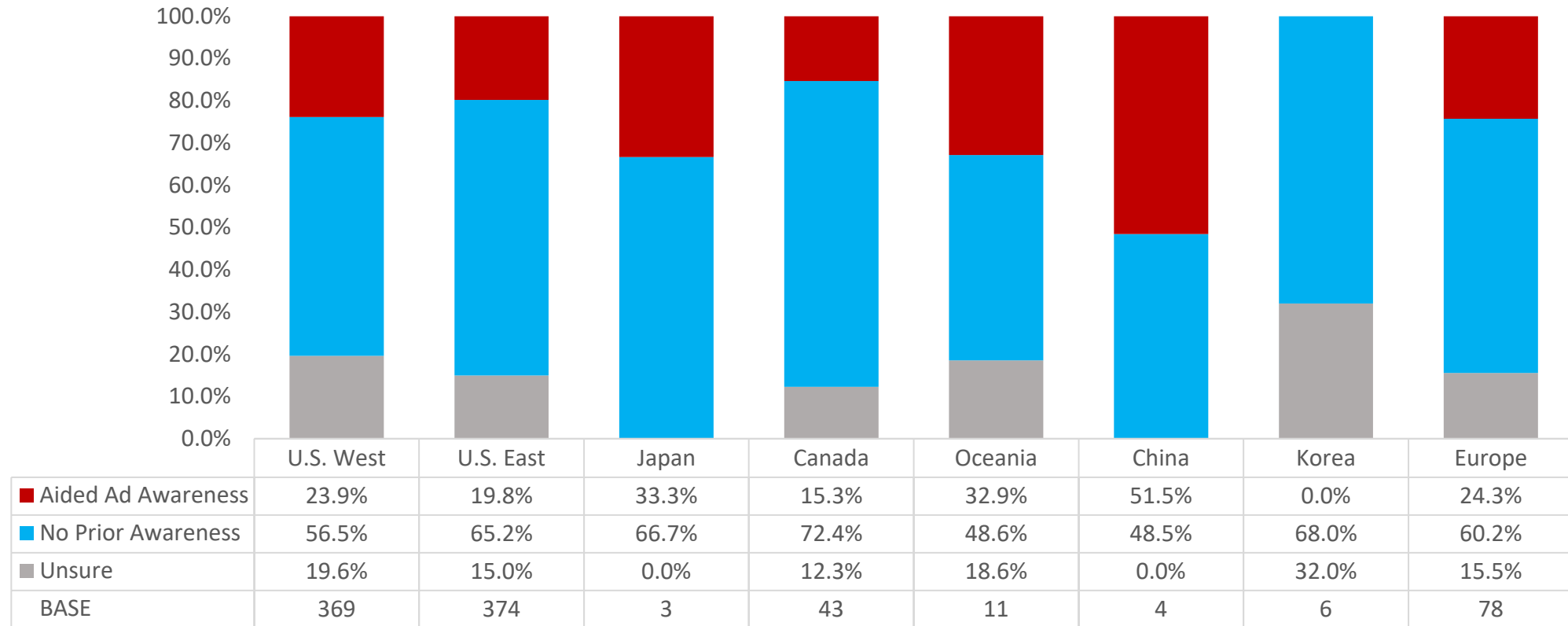
P= Preliminary Data

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. For Europe, the pandemic resulted in too few travelers in the second half of 2020. Visitors from Europe were not surveyed in 2021 through 2023.



AIDED ADVERTISING AWARENESS - KAUA'I

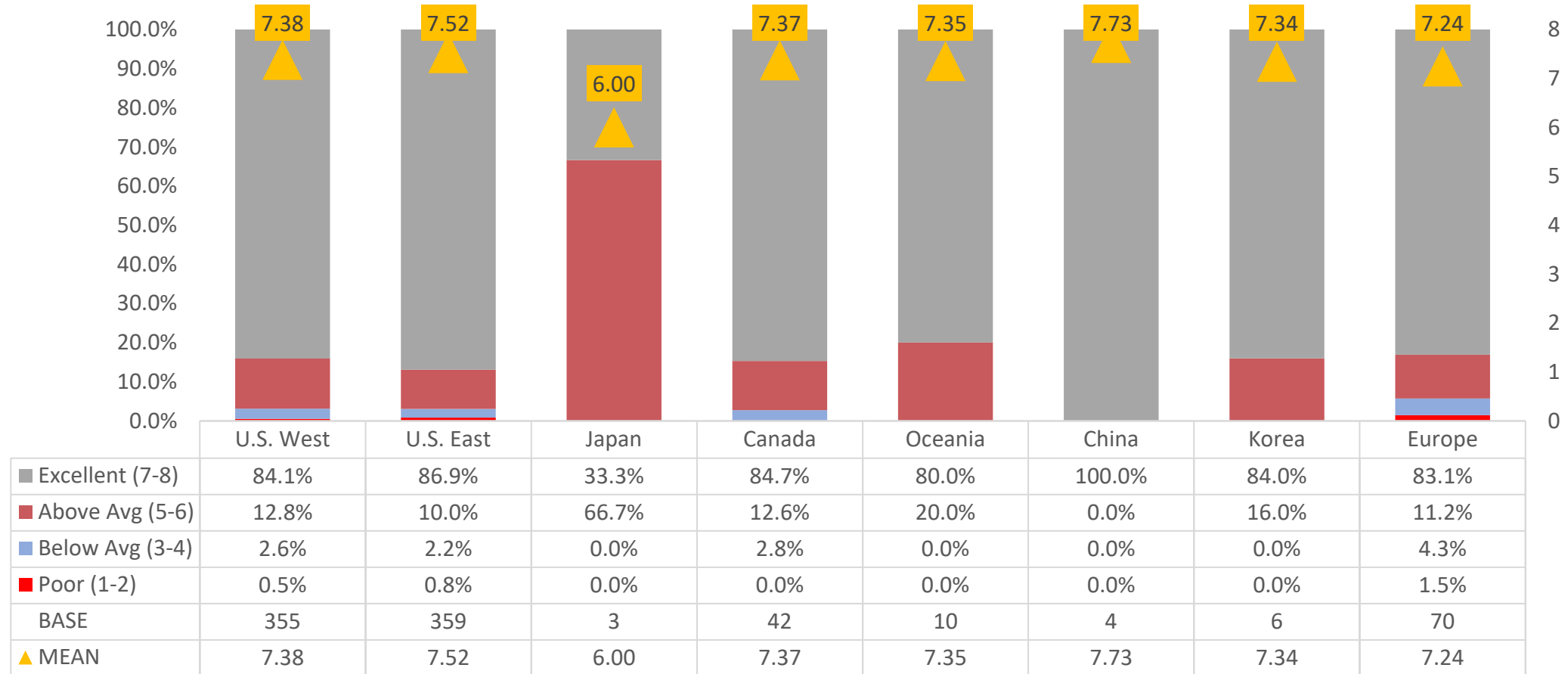


MOTIVATING FACTORS – KAUA‘I

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
Television programs or movies filmed in Hawai‘i	7.9%	9.9%	0.0%	4.2%	7.2%	24.2%	0.0%	19.4%
Hawaiian music	9.4%	7.5%	0.0%	4.2%	0.0%	0.0%	0.0%	1.3%
Social media posts and videos	12.6%	17.4%	66.7%	17.1%	7.2%	0.0%	0.0%	21.0%
Outdoor or sporting activities and events	15.9%	15.0%	0.0%	4.8%	0.0%	0.0%	0.0%	18.2%
Hawaiian cultural experiences and Hawaiian cultural events	19.3%	17.9%	0.0%	11.7%	11.4%	24.2%	0.0%	9.1%
Famous landmarks or imagery/ natural beauty (beaches, mountains, etc.)	51.3%	56.9%	66.7%	48.4%	28.6%	51.5%	68.0%	63.6%
Attend a festival or other event	1.0%	1.9%	0.0%	2.7%	7.2%	0.0%	0.0%	0.0%
BASE	369	374	3	43	11	4	6	77

FRIENDLINESS OF KAUA'I RESIDENTS

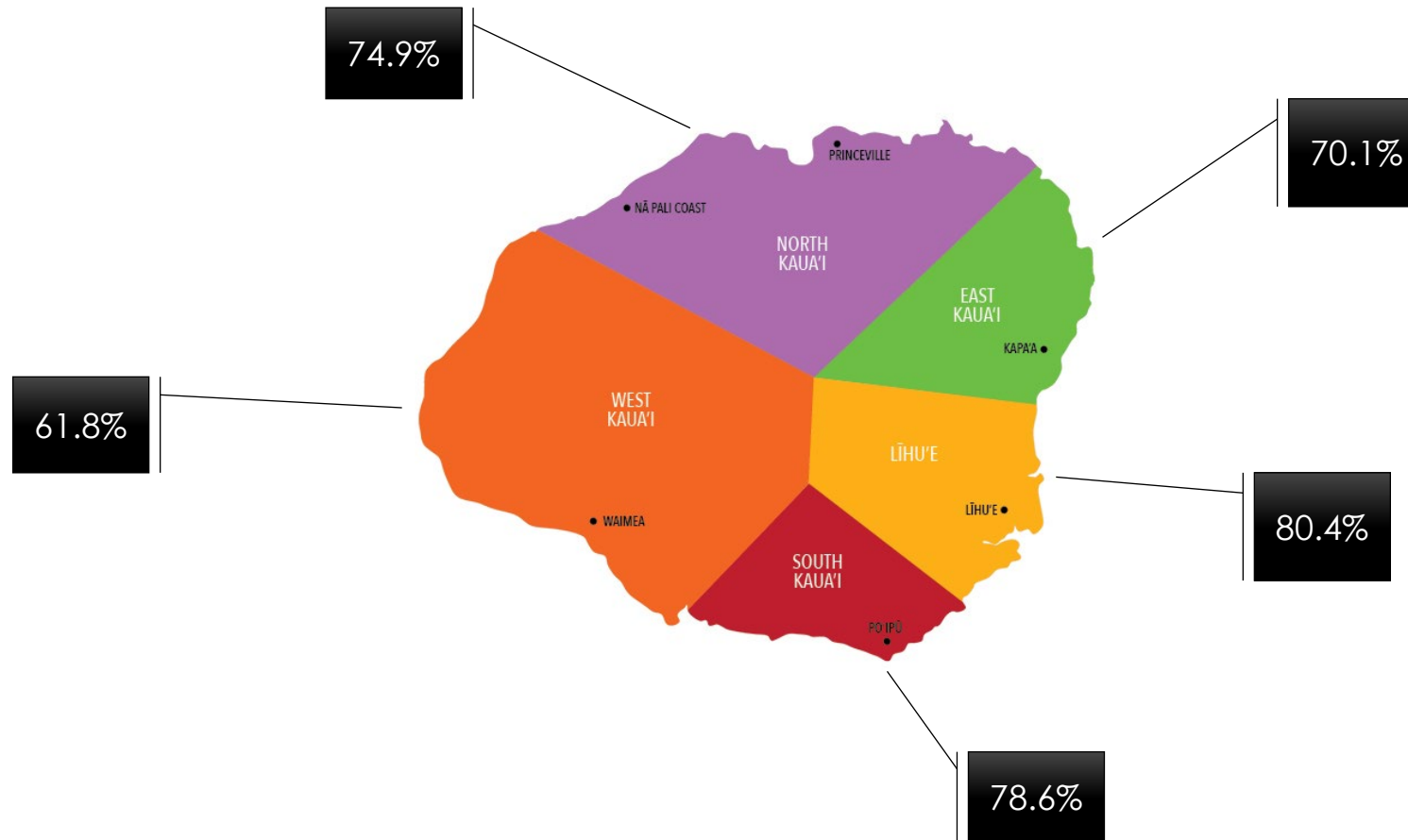
8-pt Rating Scale
8=Excellent / 1=Poor



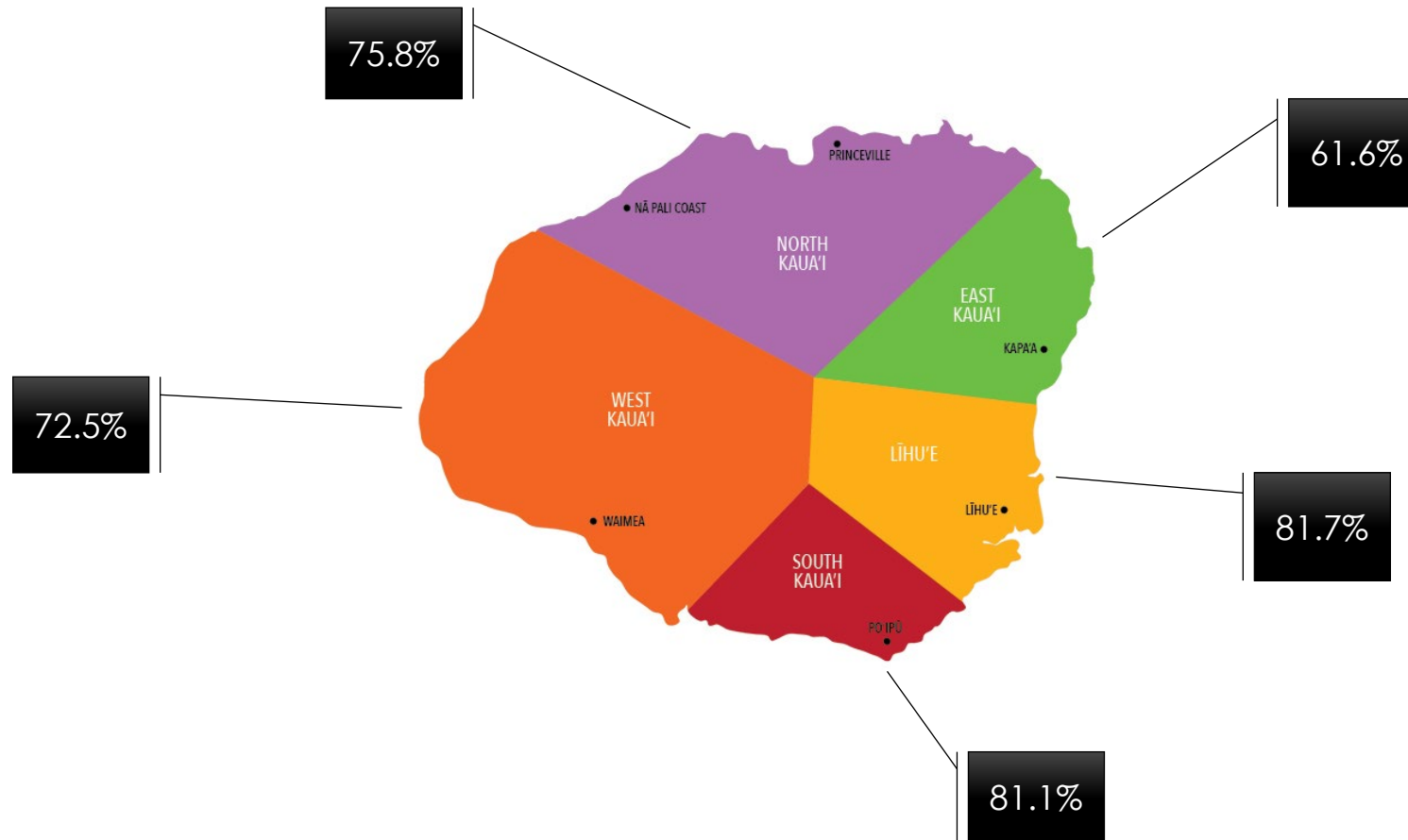
TOP TRIP INFLUENCERS – KAUA‘I

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
Been here before	41.7%	26.6%	33.3%	24.8%	10.2%	0.0%	0.0%	13.7%
Friend recommendation	32.6%	35.0%	0.0%	23.2%	26.5%	51.5%	16.0%	23.7%
Cruise line stop/ part of tour	2.1%	7.1%	0.0%	19.1%	53.0%	0.0%	0.0%	5.9%
Article/ blog	2.4%	4.8%	66.7%	10.7%	0.0%	0.0%	0.0%	22.5%
Social media post	2.5%	4.5%	0.0%	7.2%	0.0%	48.5%	0.0%	7.4%
Attending conference/ event	2.3%	3.9%	0.0%	0.0%	0.0%	0.0%	0.0%	2.9%
Visiting friends/ relatives	1.7%	3.4%	0.0%	7.2%	0.0%	0.0%	0.0%	0.0%
Own a timeshare	2.9%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Location/ never been, but went to other islands	2.0%	2.0%	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%
Want to visit/ love Kaua‘i/ favorite island	1.7%	2.2%	0.0%	0.0%	10.2%	0.0%	0.0%	2.7%
Travel agent	0.3%	3.4%	0.0%	2.8%	0.0%	0.0%	34.0%	13.6%
Did my own research	1.5%	1.4%	0.0%	0.0%	0.0%	0.0%	16.0%	0.0%
Package price/ affordability / cost	2.0%	0.6%	0.0%	0.0%	0.0%	0.0%	18.0%	0.0%

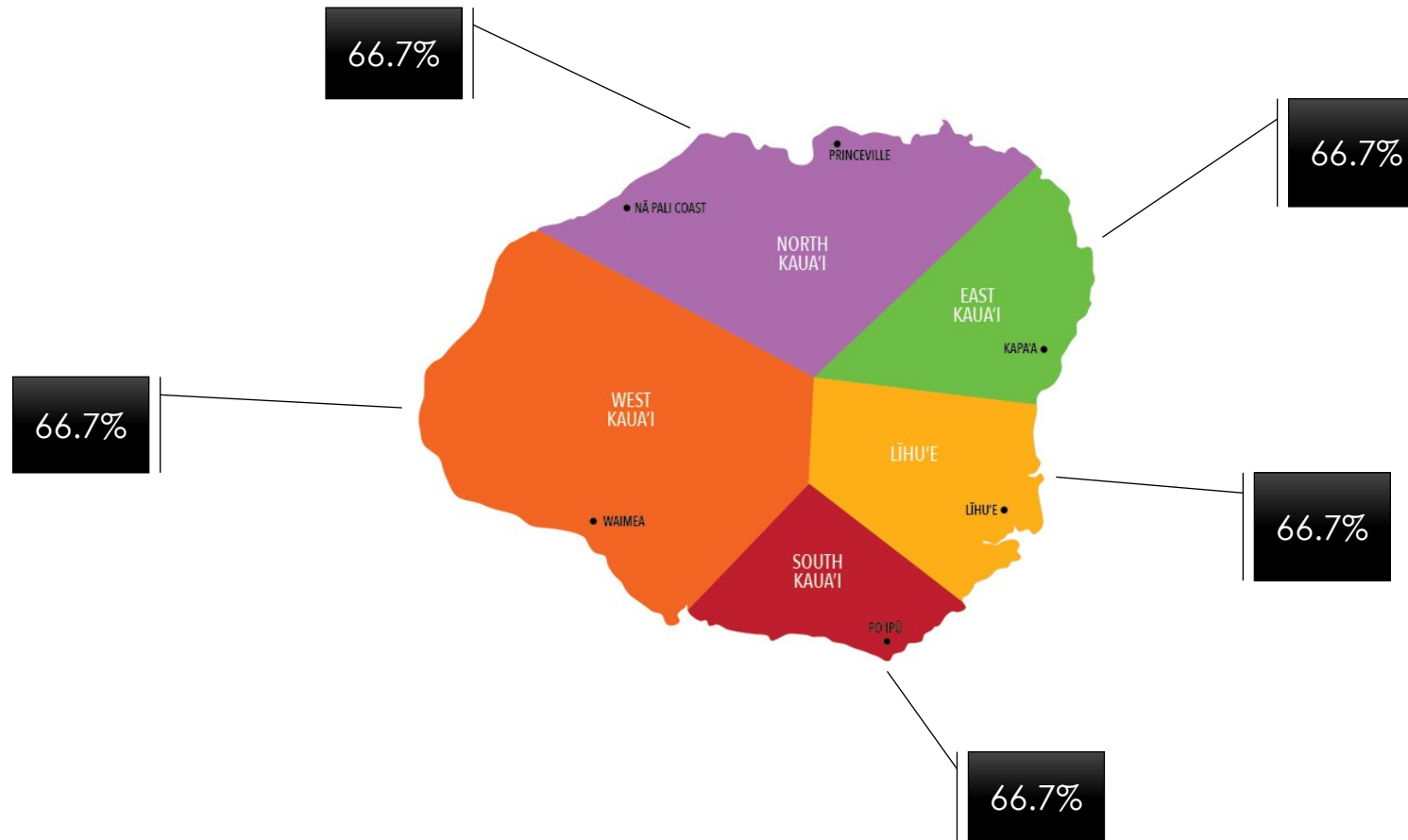
AREAS VISITED - KAUA'I U.S. WEST



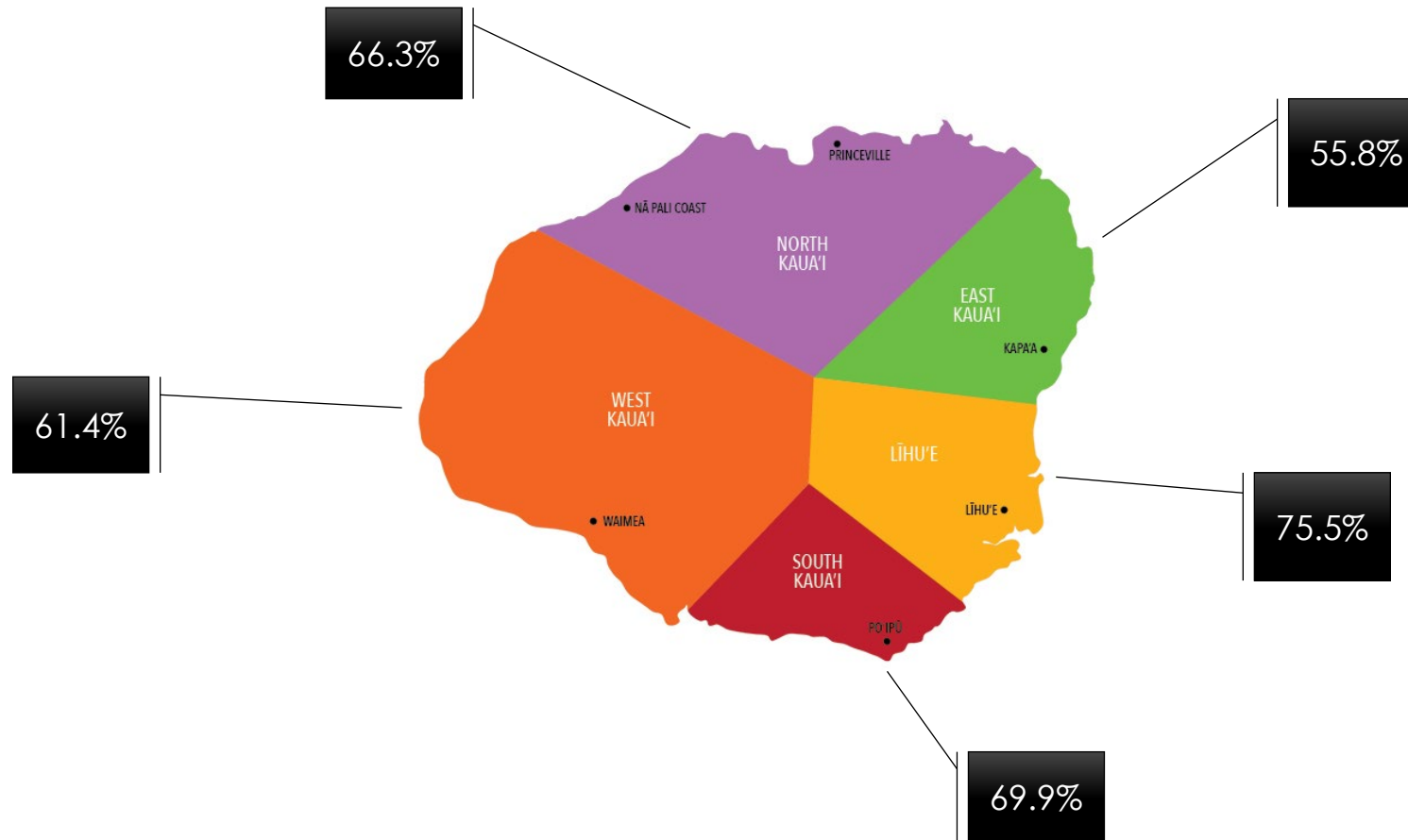
AREAS VISITED - KAUA'I U.S. EAST



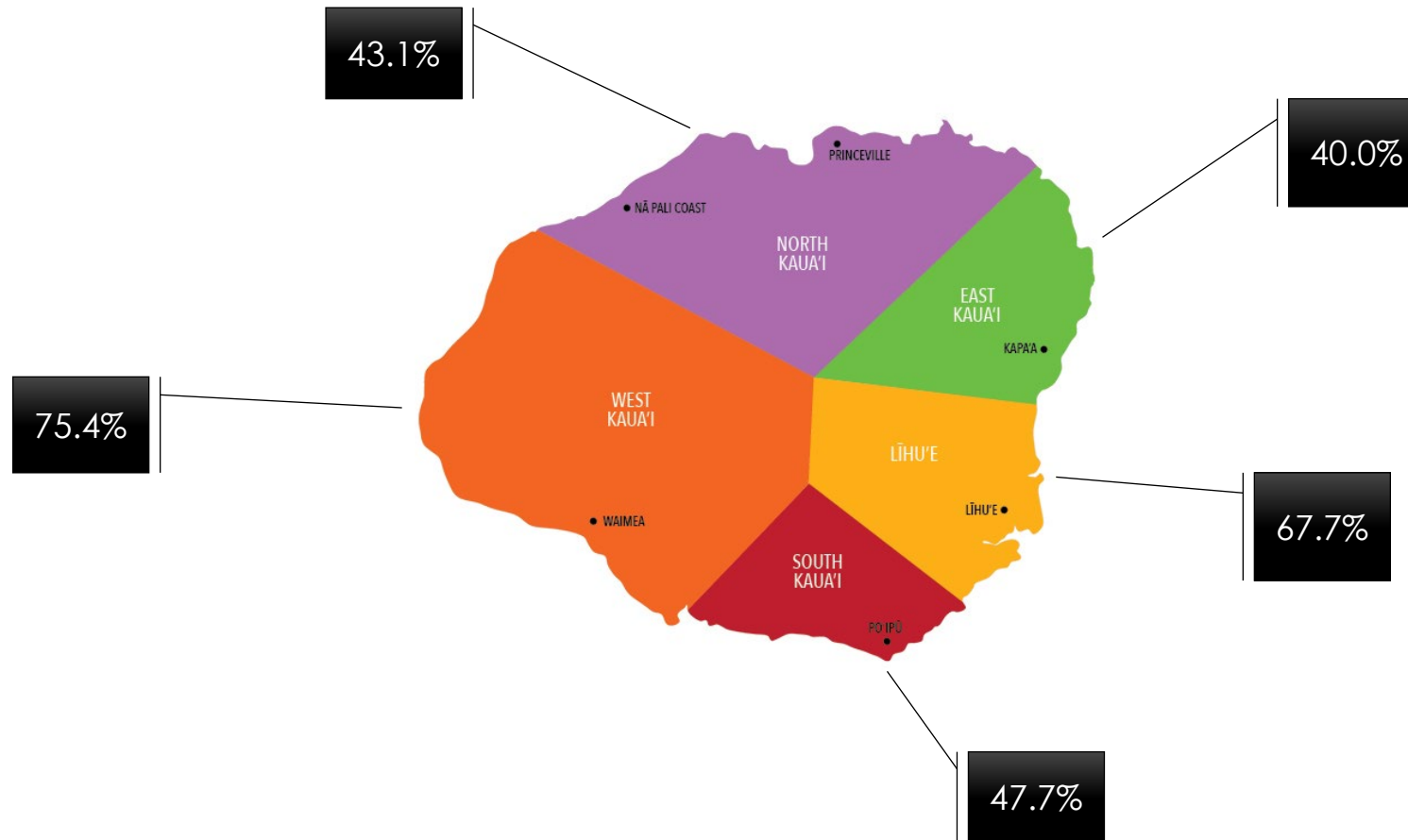
AREAS VISITED - KAUA'I JAPAN



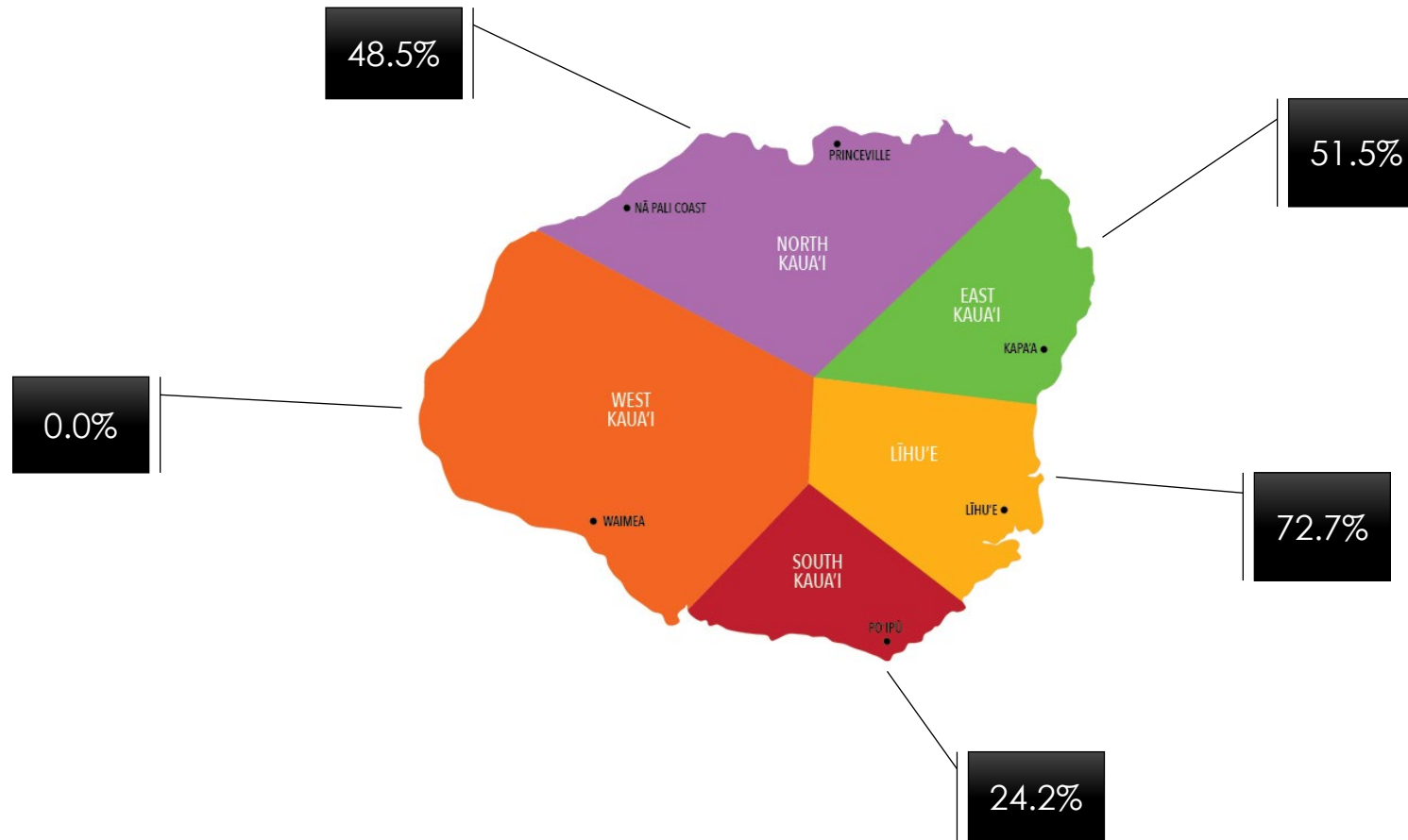
AREAS VISITED - KAUA'I CANADA



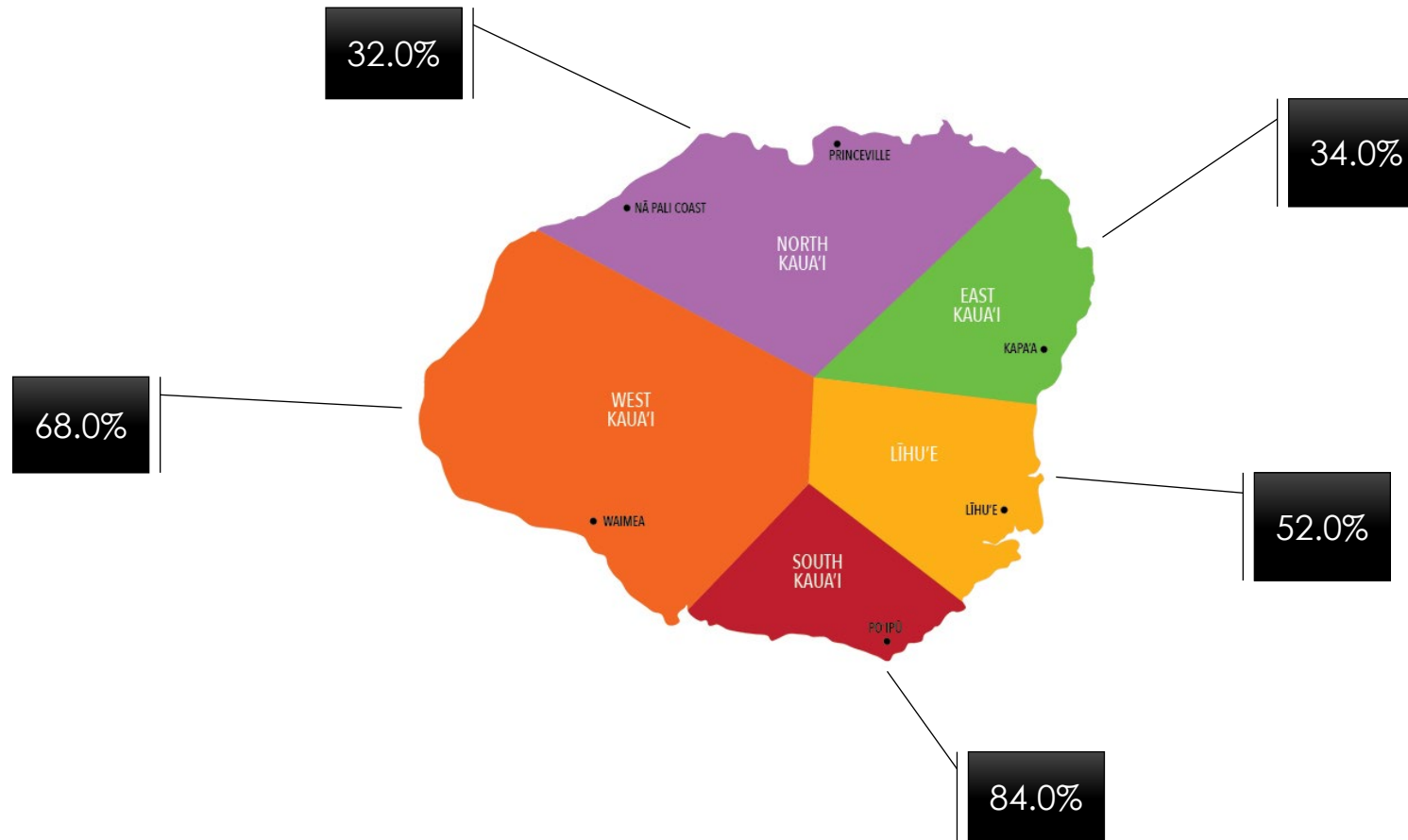
AREAS VISITED - KAUA'I OCEANIA



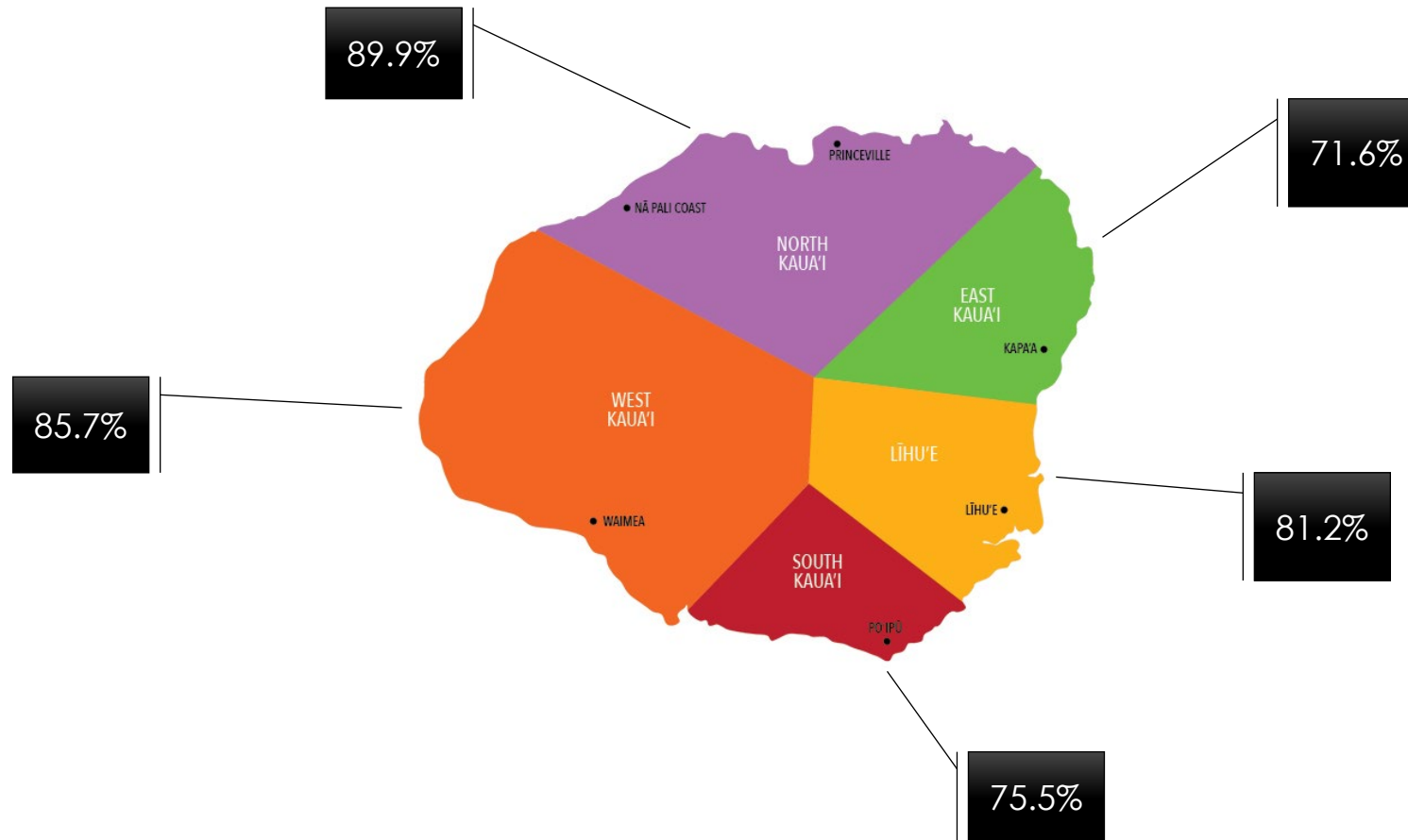
AREAS VISITED - KAUA'I CHINA



AREAS VISITED - KAUA'I KOREA



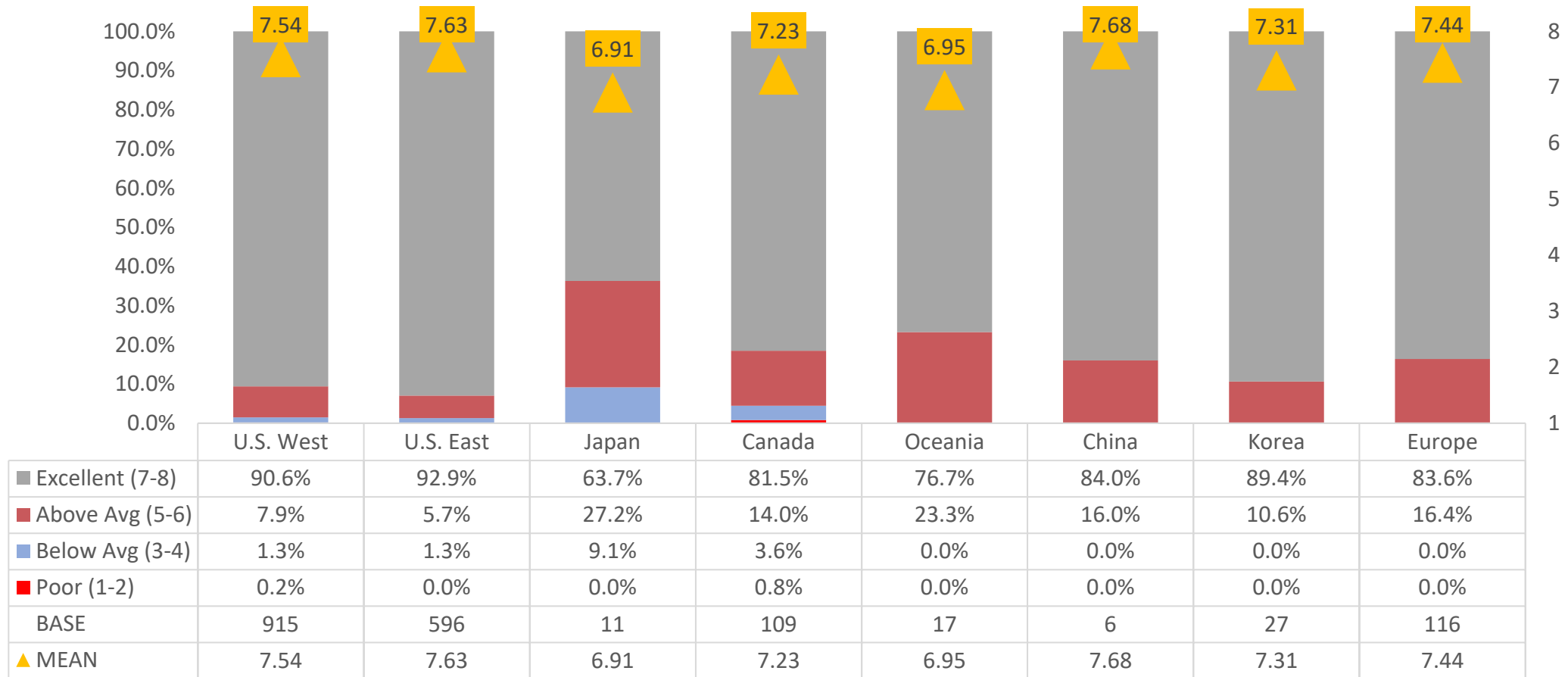
AREAS VISITED - KAUA'I EUROPE



Section 9 – Maui

SATISFACTION - MAUI

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

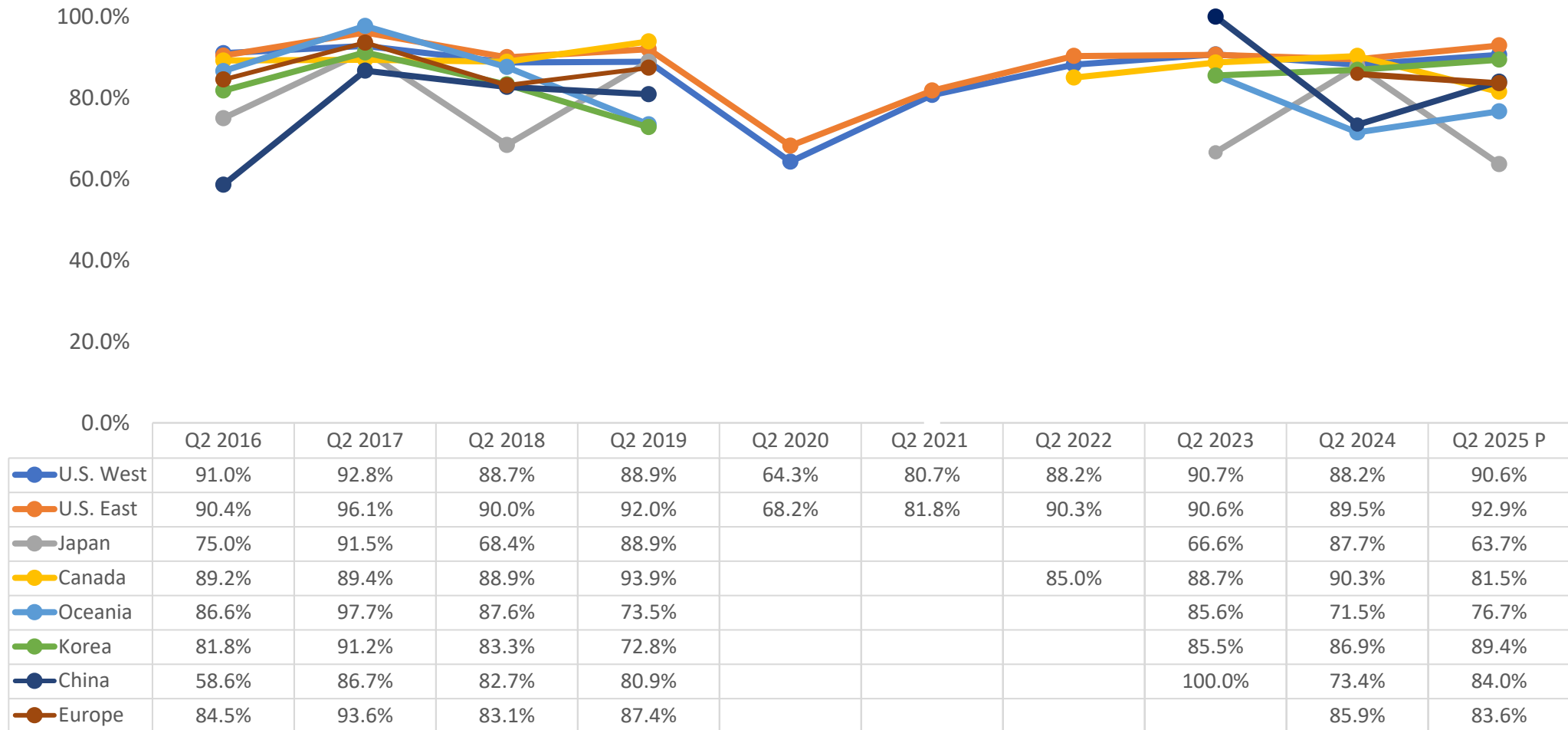


SATISFACTION – MAUI

- **Gender:** Female visitors from **U.S. East** were more satisfied with Maui overall compared to their male counterparts.
- **Islands visited:** Respondents from **U.S. West** whose trip was limited to Maui gave the island higher satisfaction scores than those visitors whose trip included stays on multiple islands in addition to Maui.
- **Travel party size:** Those visitors from **U.S. West** traveling in pairs were the most satisfied with Maui.

SATISFACTION - MAUI

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



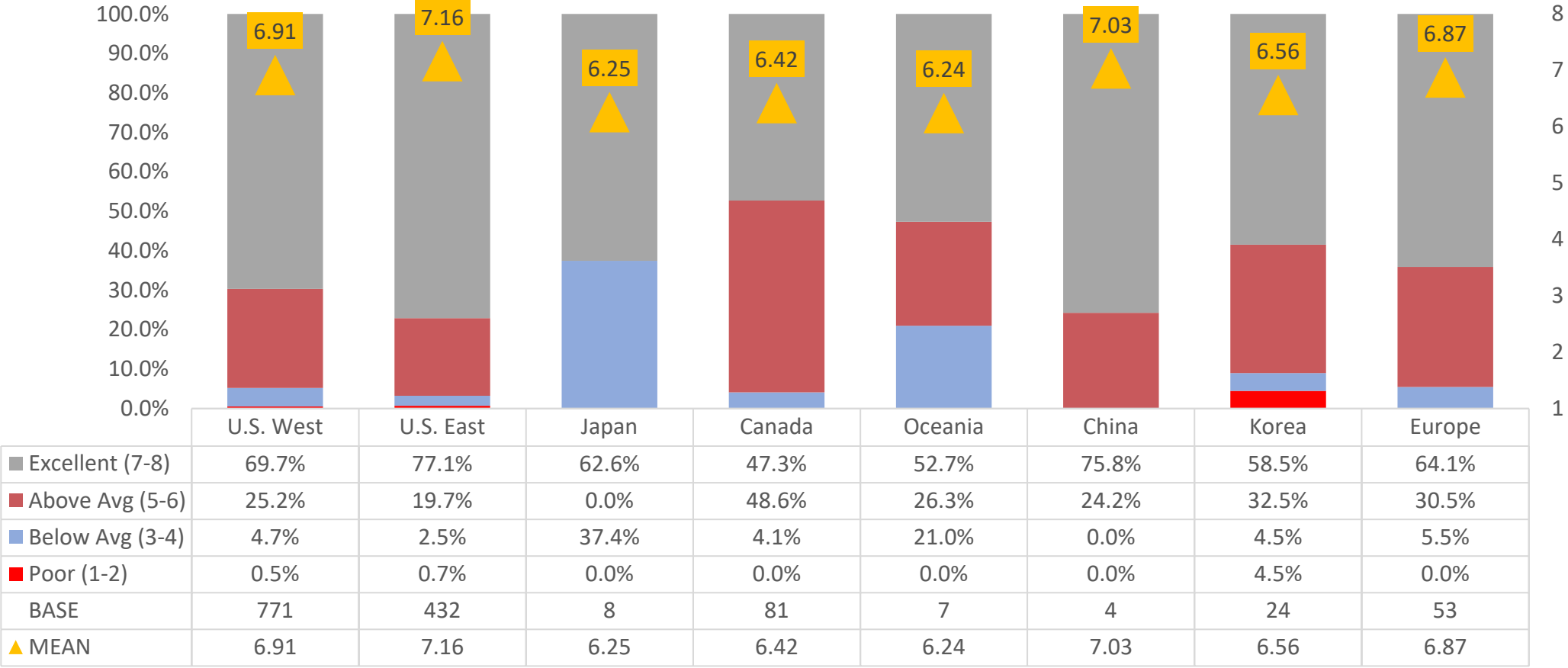
P= Preliminary Data

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. For Europe, the pandemic resulted in too few travelers in the second half of 2020. Visitors from Europe were not surveyed in 2021 through 2023.

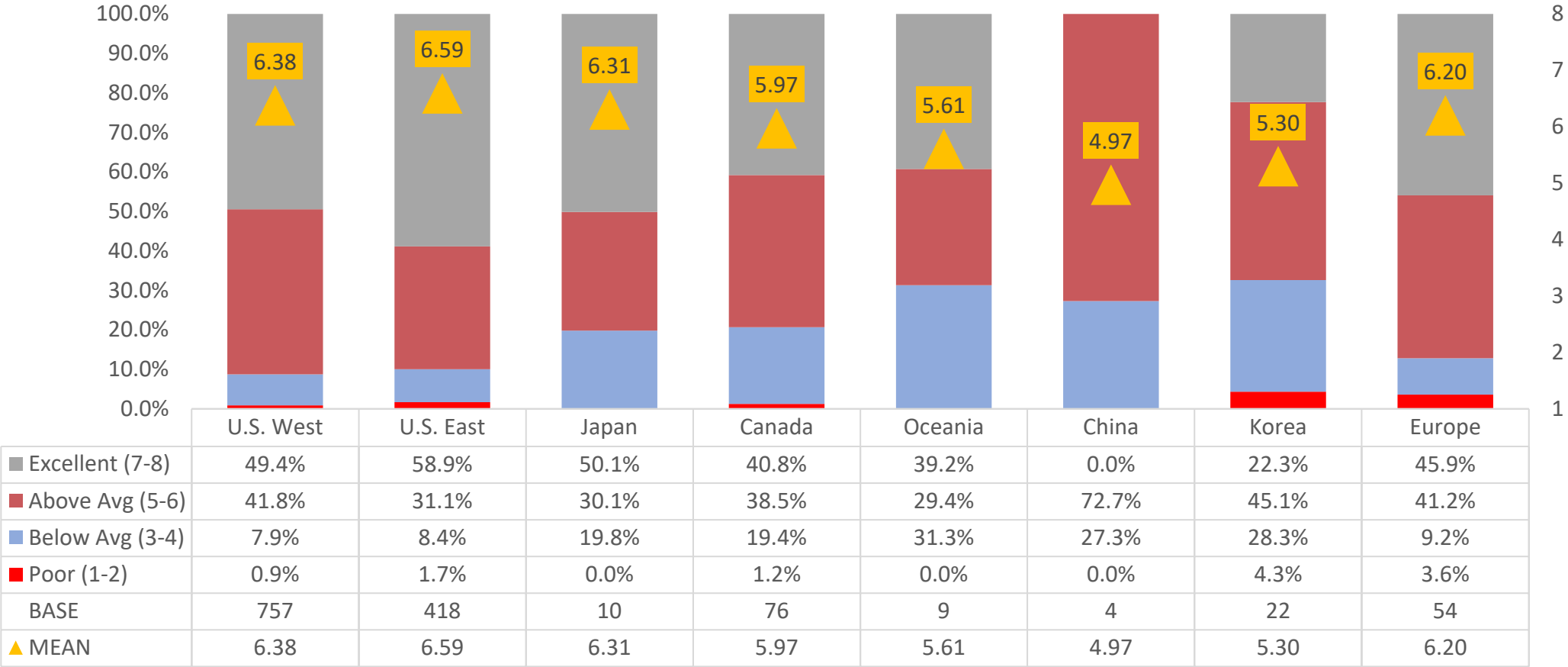
ENTERTAINMENT/ ATTRACTIONS - MAUI

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



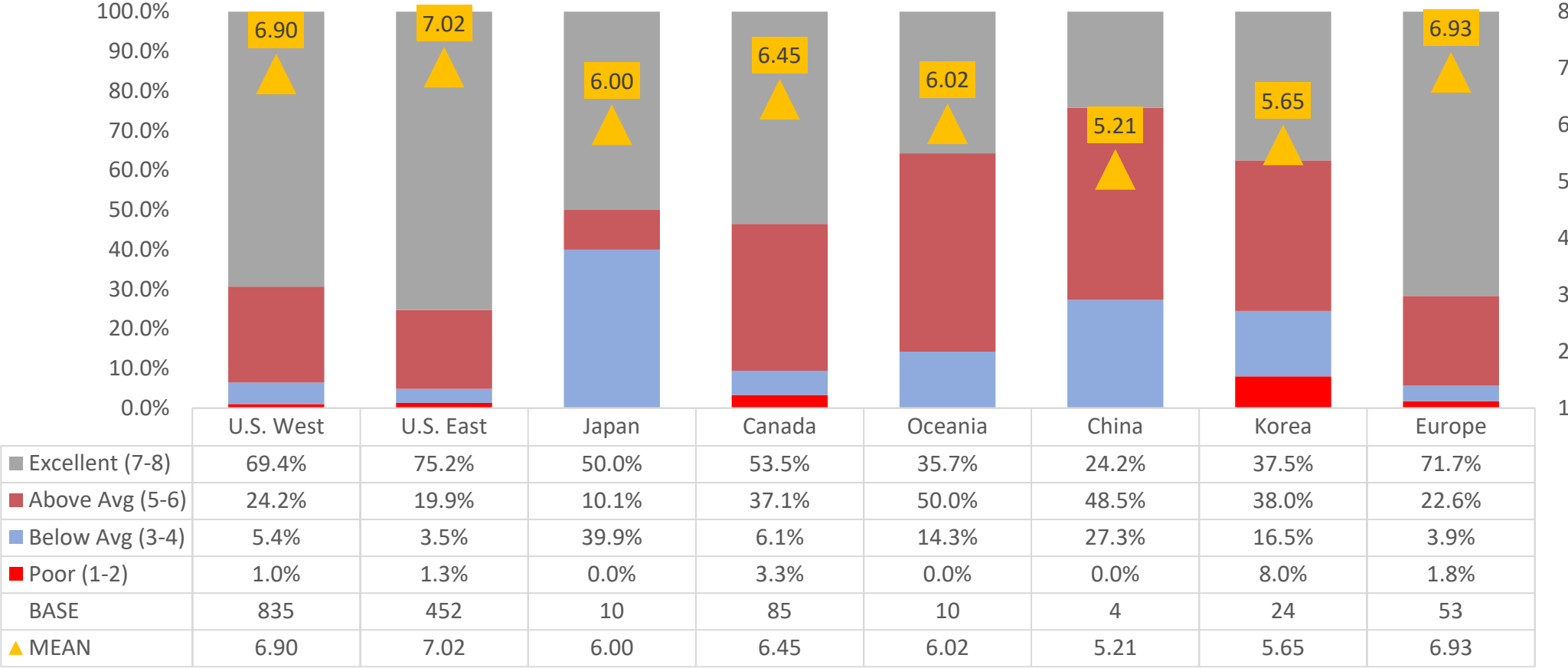
SHOPPING - MAUI

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



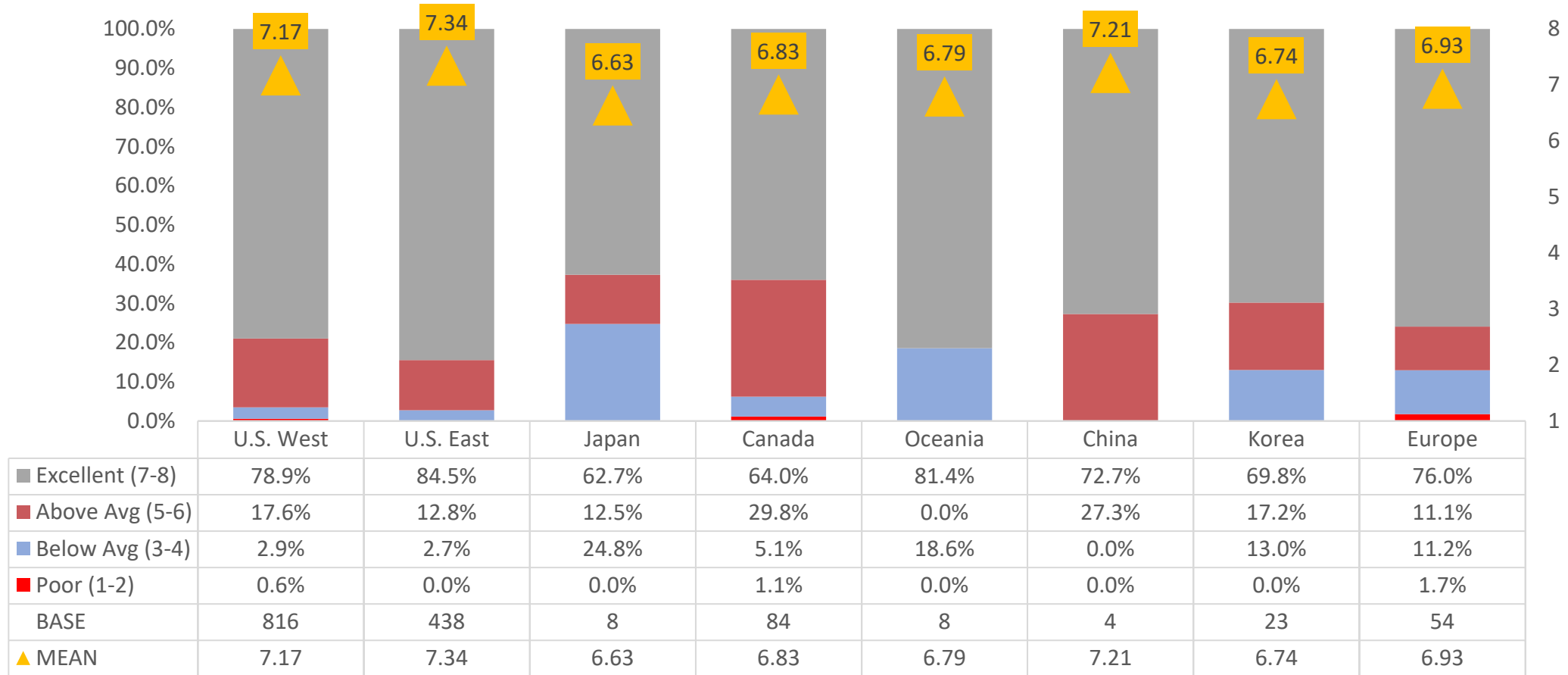
DINING/ FOOD & BEVERAGE - MAUI

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



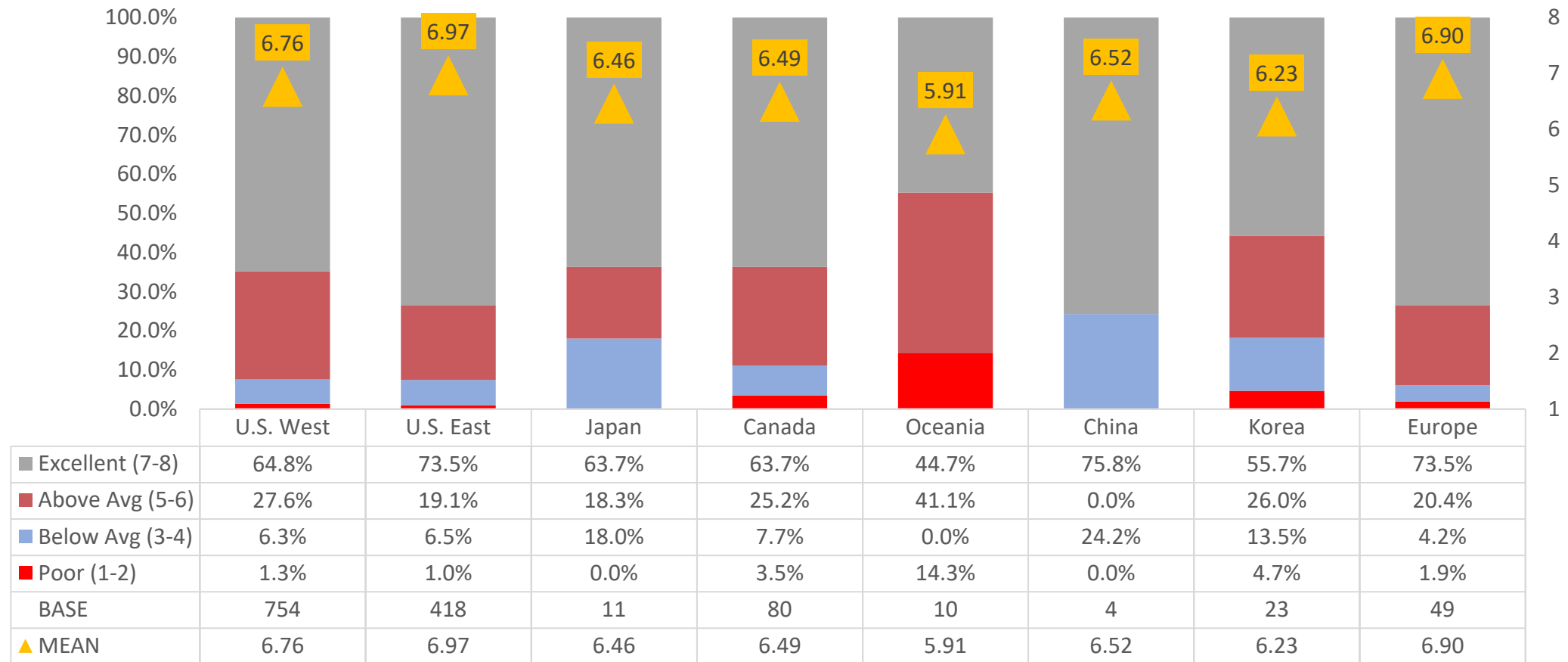
LODGING/ ACCOMMODATIONS - MAUI

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



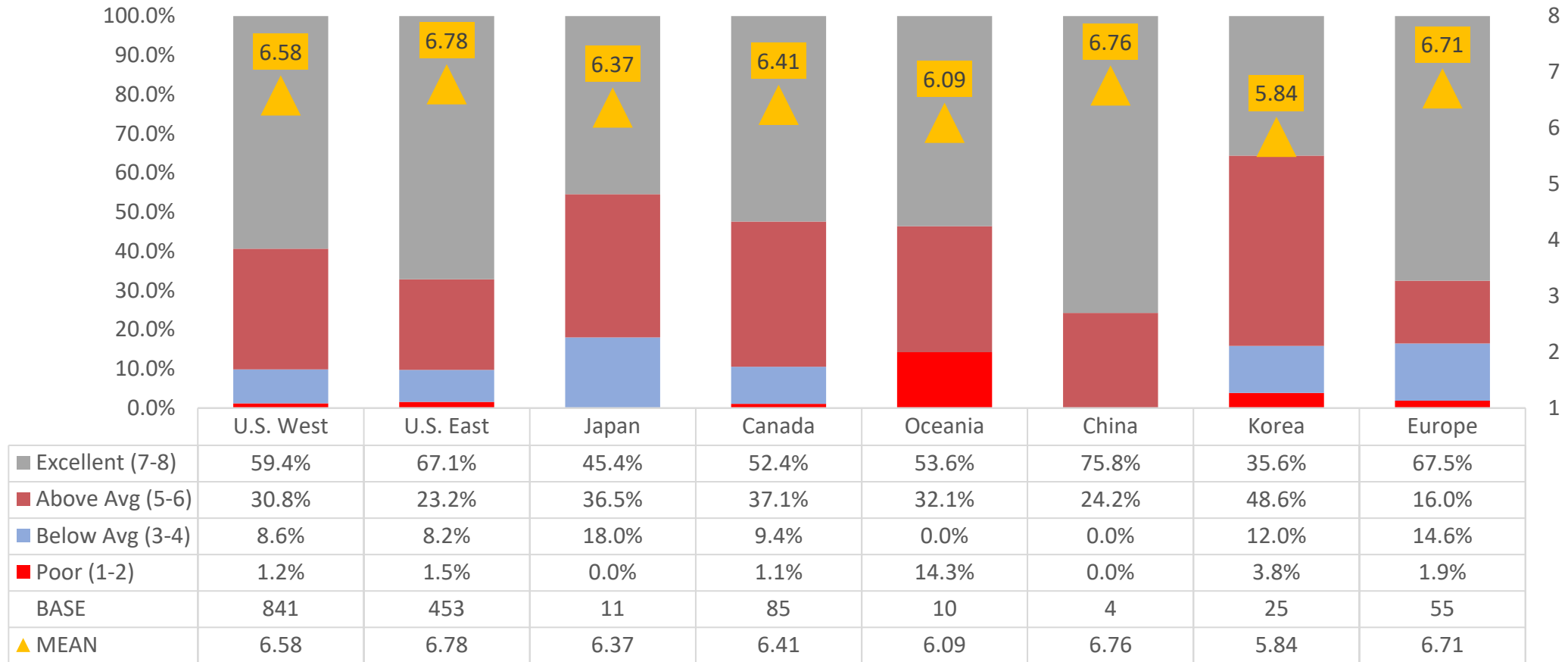
TRANSPORTATION ON ISLAND - MAUI

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



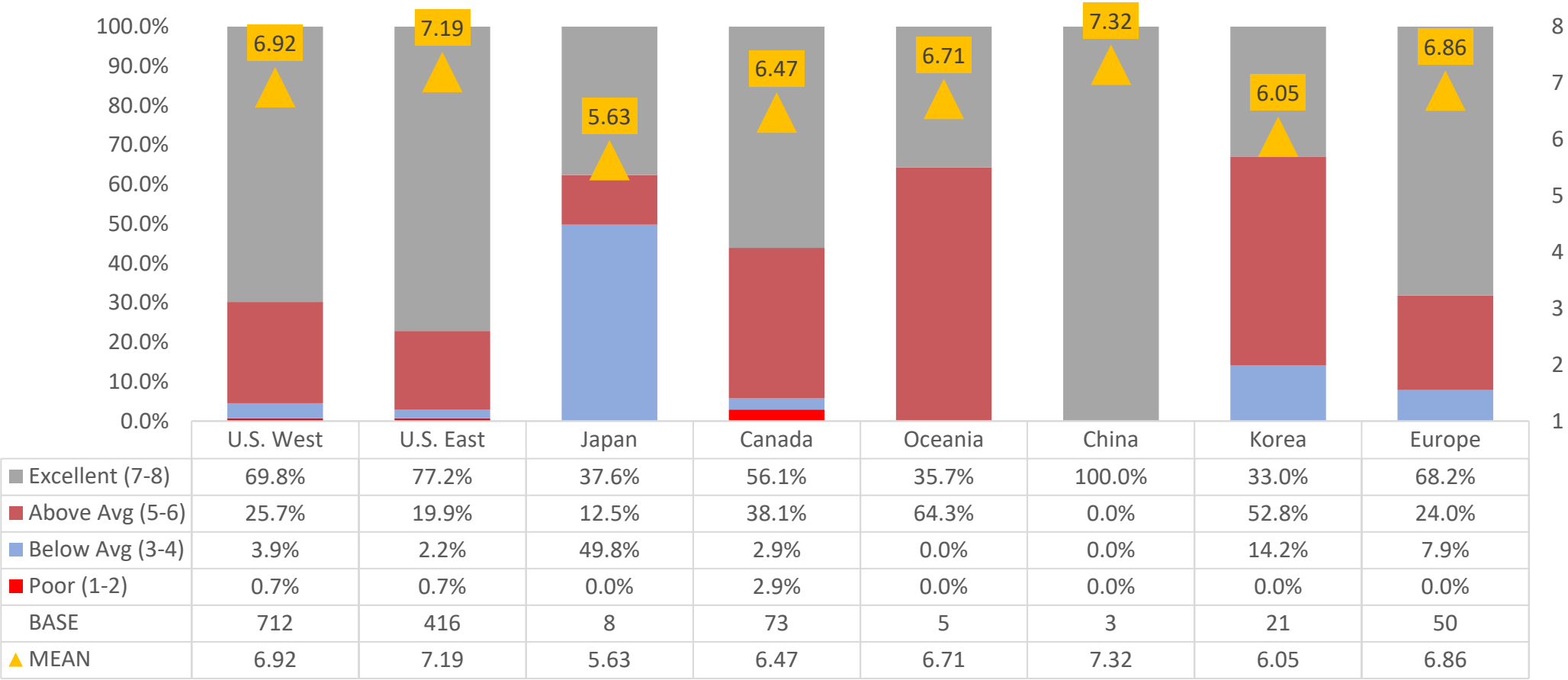
AIRPORT - MAUI

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



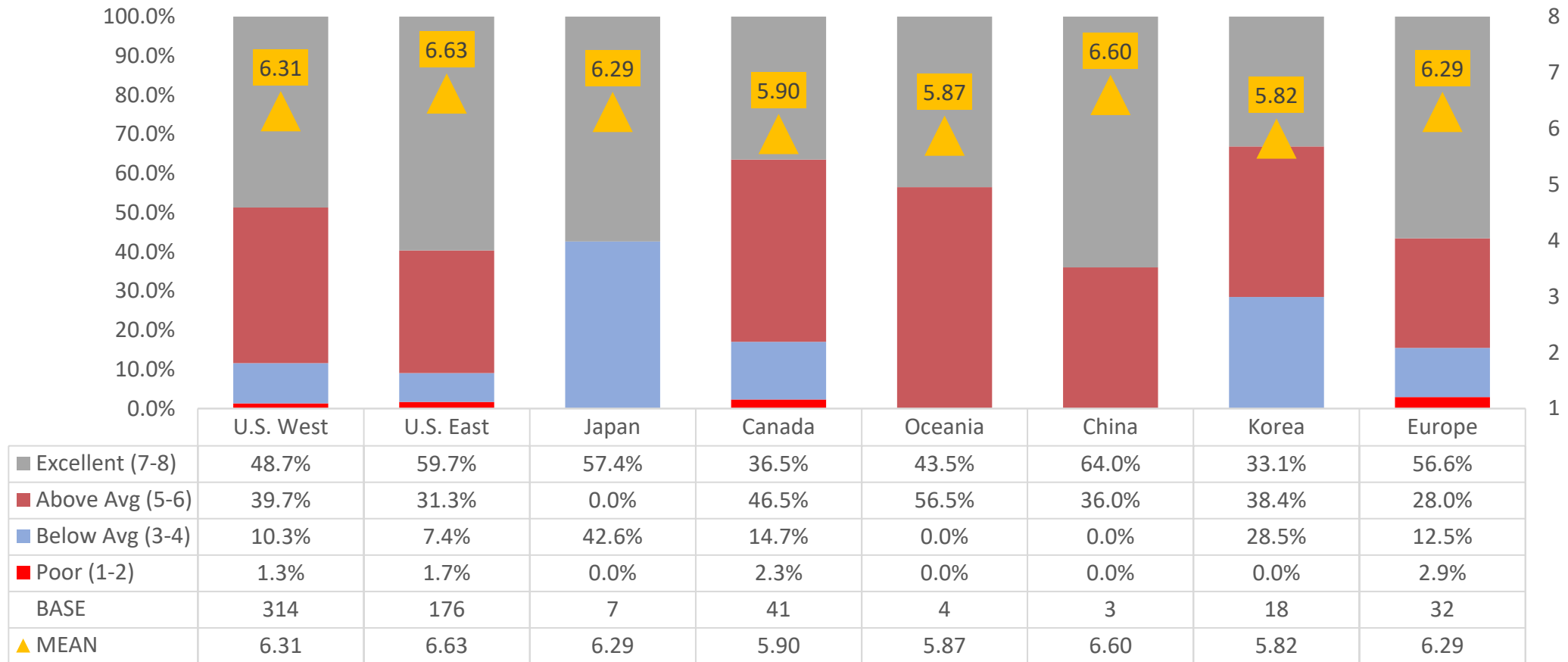
CULTURAL EXPERIENCES - MAUI

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



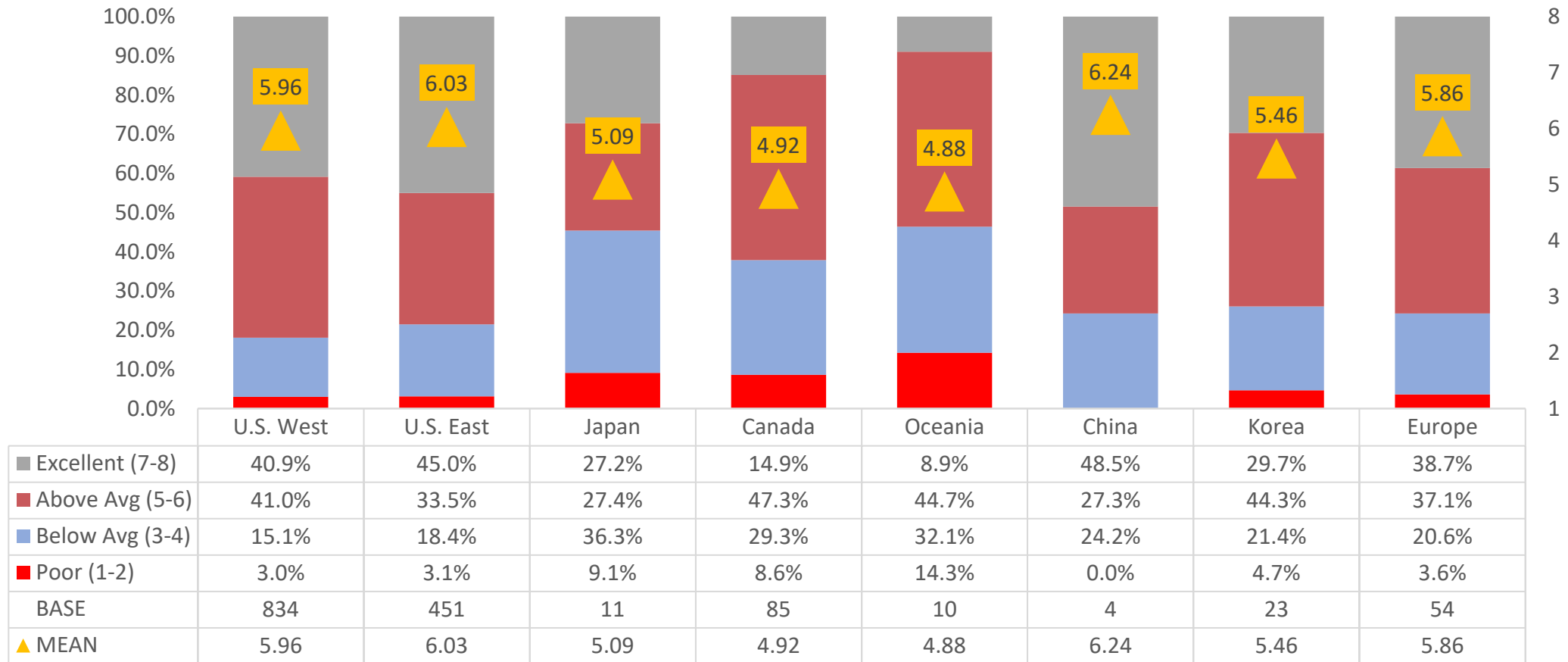
VOLUNTEER EXPERIENCES - MAUI

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



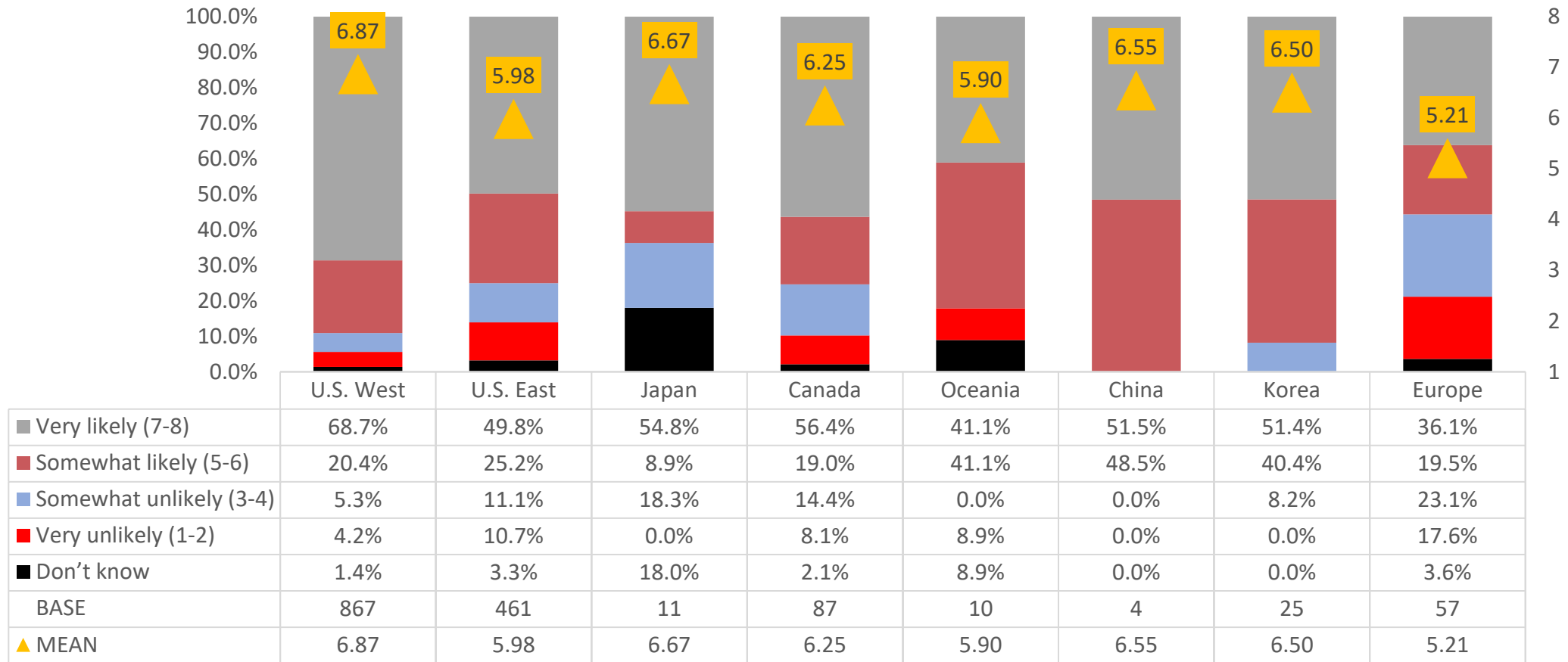
VALUE FOR THE MONEY – MAUI

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



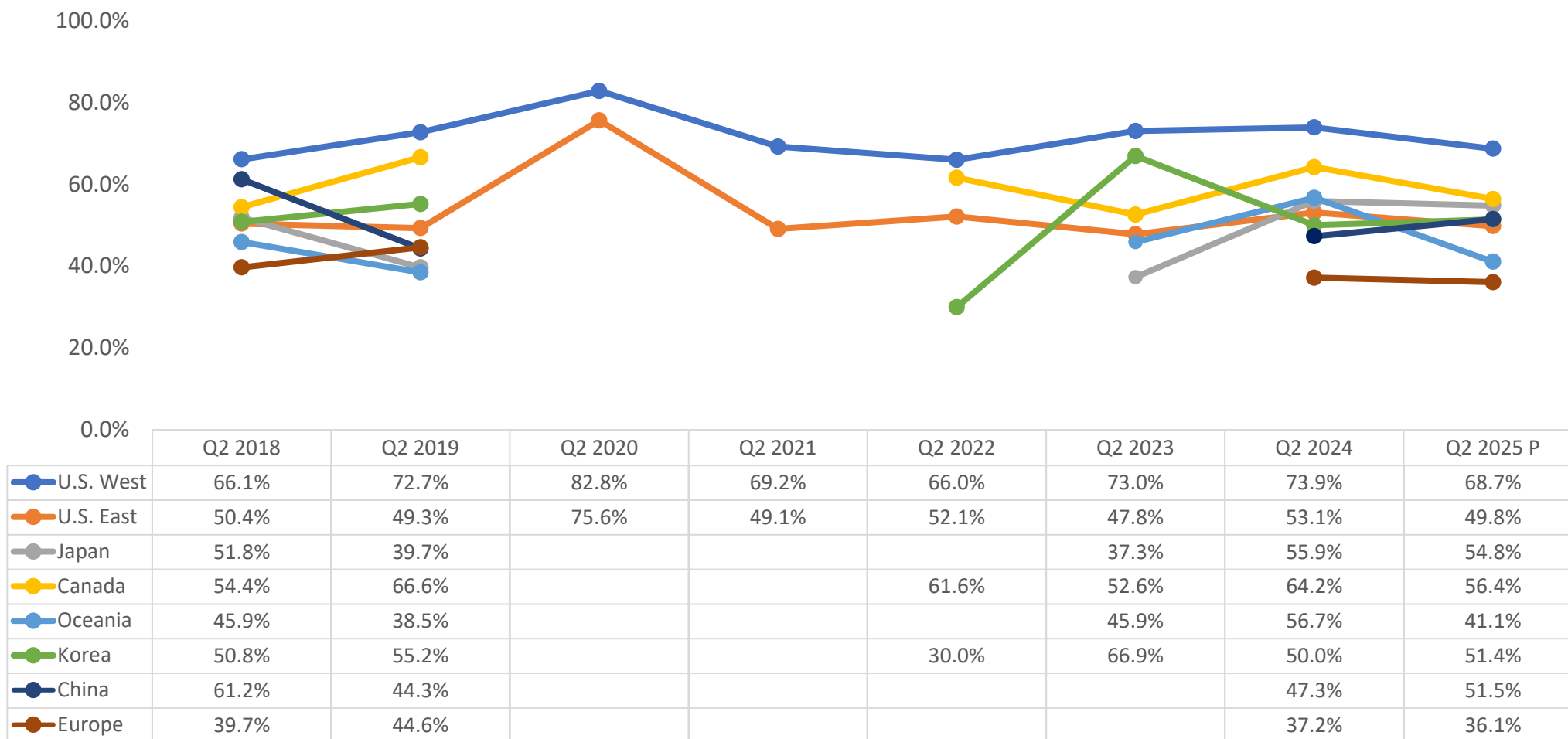
LIKELIHOOD OF RETURN VISIT - MAUI

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



LIKELIHOOD OF RETURN VISIT - MAUI

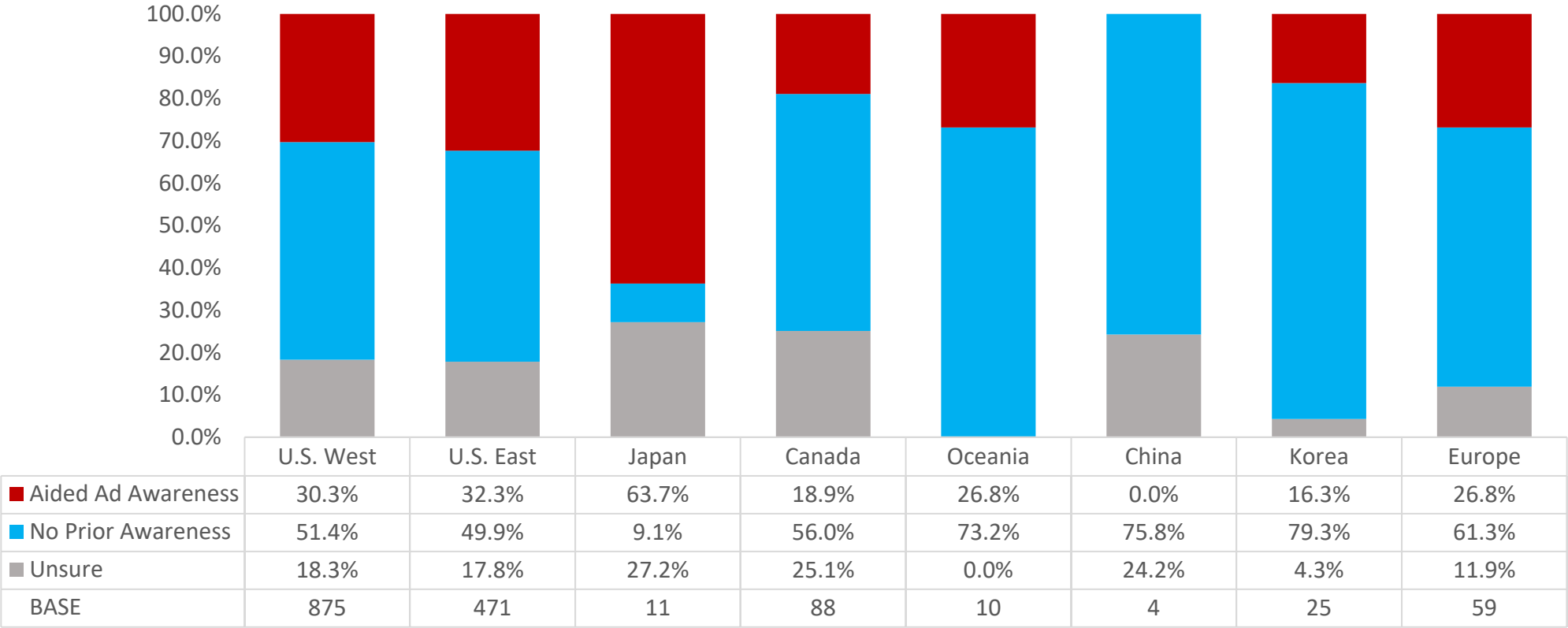
TOP BOX - VERY LIKELY (7-8)



P= Preliminary Data

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

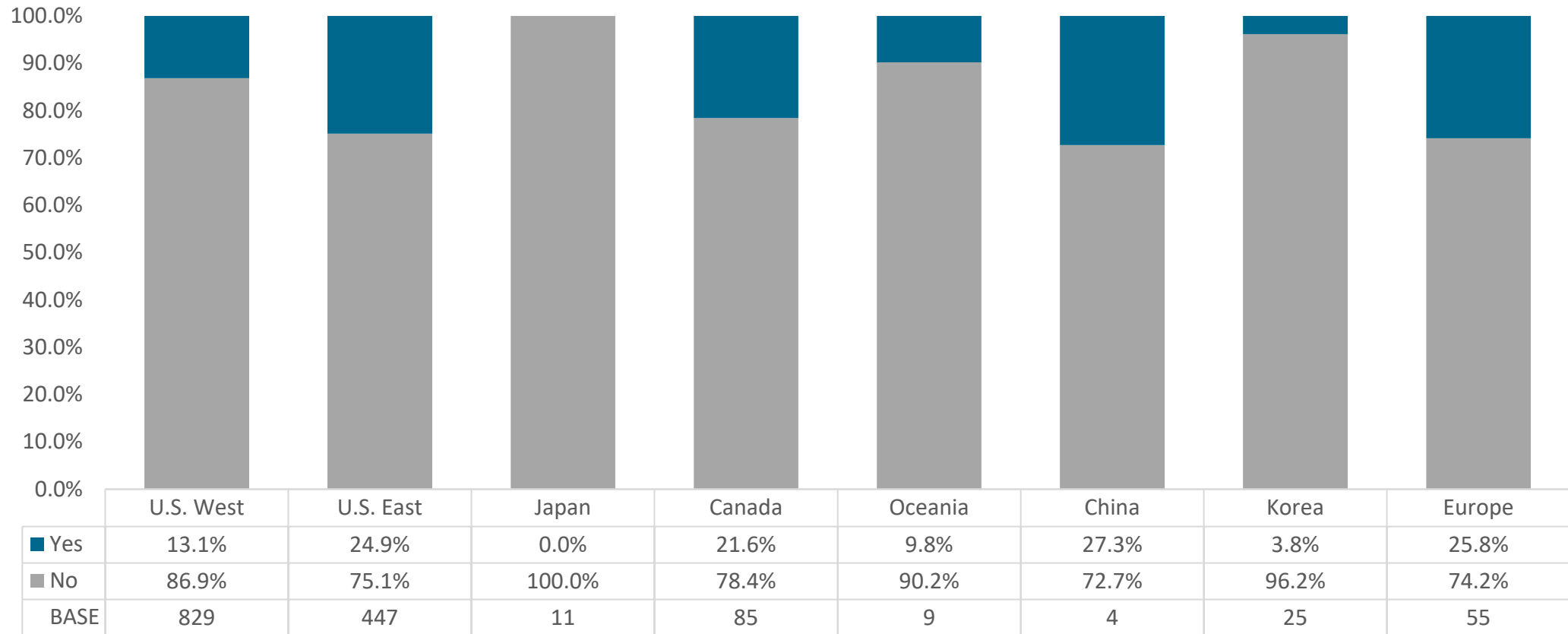
AIDED ADVERTISING AWARENESS - MAUI



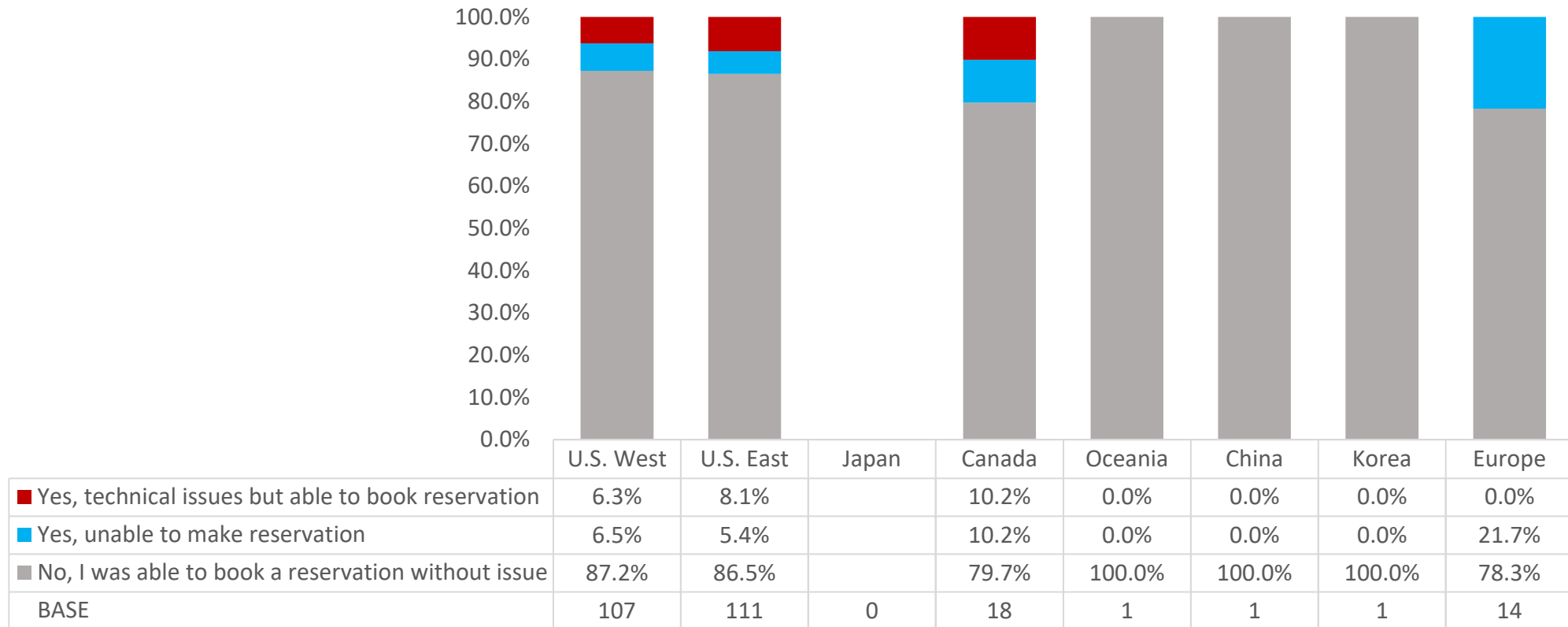
MOTIVATING FACTORS - MAUI

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
Television programs or movies filmed in Hawai'i	9.0%	13.5%	45.4%	11.8%	0.0%	0.0%	3.8%	18.9%
Hawaiian music	13.5%	8.7%	36.3%	20.2%	0.0%	0.0%	0.0%	11.4%
Social media posts and videos	18.4%	22.7%	27.2%	17.7%	8.9%	24.2%	11.5%	17.3%
Outdoor or sporting activities and events	15.0%	13.9%	18.3%	15.1%	0.0%	0.0%	8.2%	21.9%
Hawaiian cultural experiences and Hawaiian cultural events	20.9%	26.9%	9.1%	11.2%	0.0%	24.2%	0.0%	23.5%
Famous landmarks or imagery/ natural beauty (beaches, mountains, etc.)	44.1%	48.6%	45.4%	40.5%	32.1%	51.5%	47.6%	51.0%
Attend a festival or other event	4.5%	2.8%	0.0%	5.3%	0.0%	24.2%	15.9%	0.0%
BASE	874	469	11	88	10	4	25	59

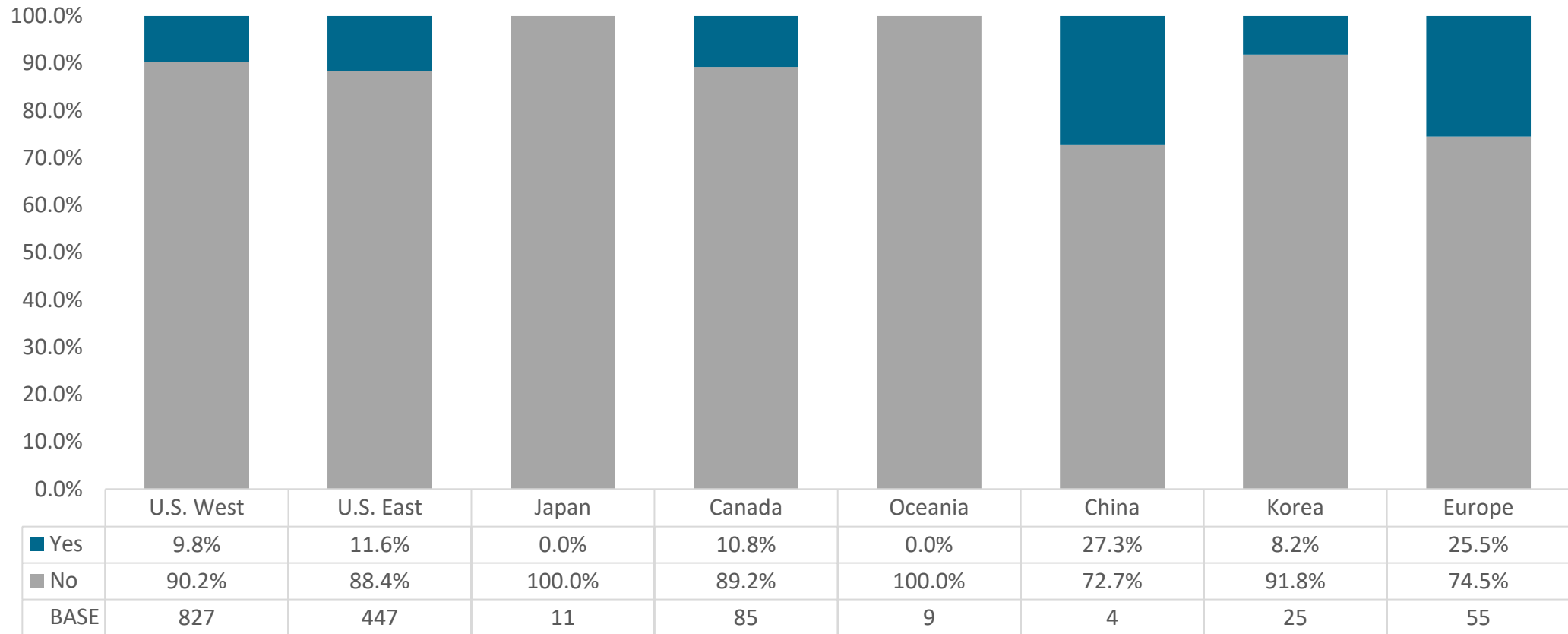
WAI‘ĀNAPANAPA STATE PARK - RESERVATIONS SYSTEM USE



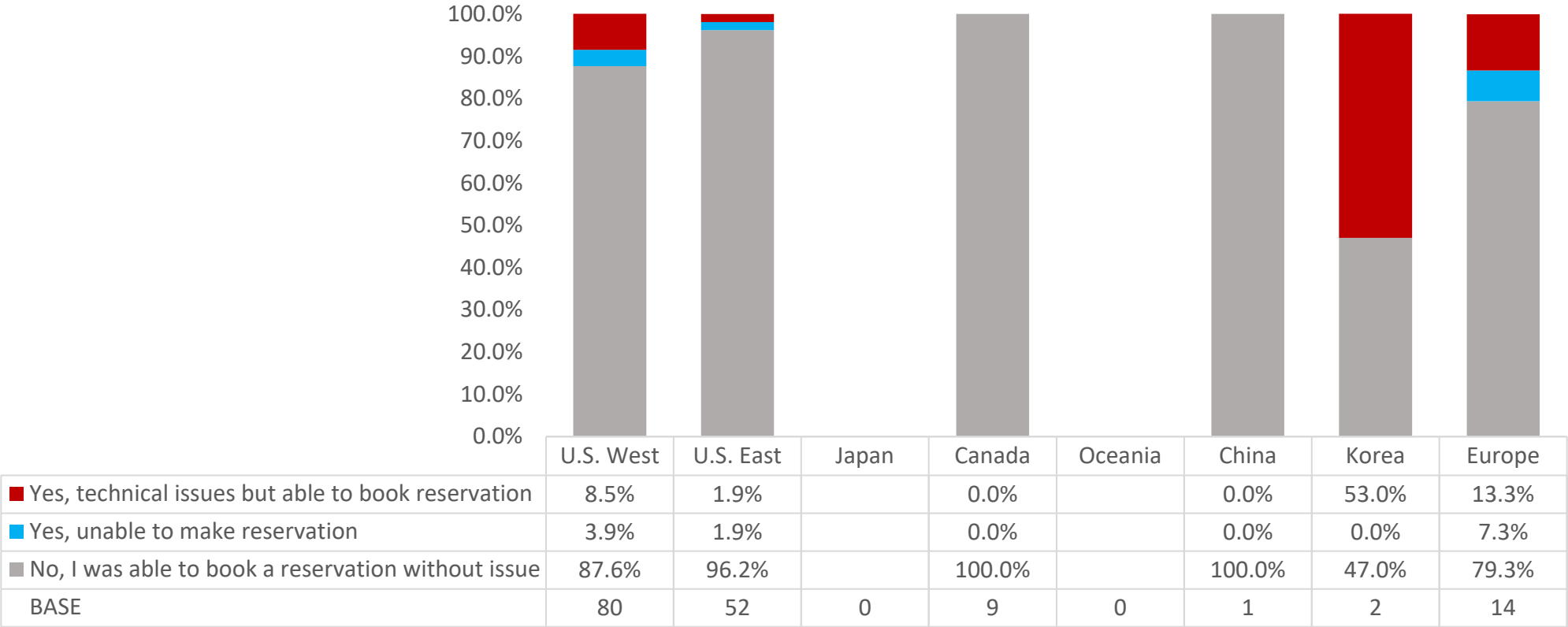
WAI‘ĀNAPANAPA STATE PARK - RESERVATIONS SYSTEM PROBLEMS



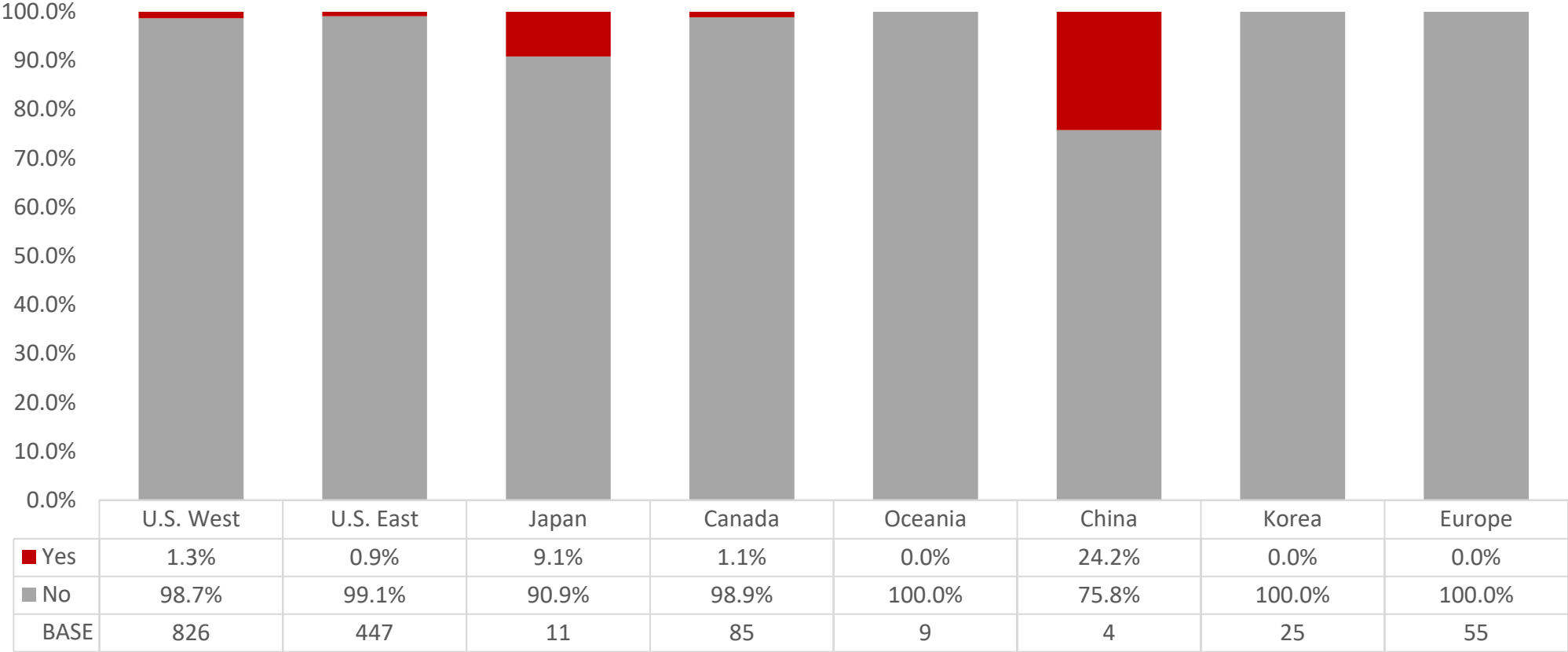
‘ĪAO VALLEY STATE MONUMENT - RESERVATIONS SYSTEM USE



‘ĪAO VALLEY STATE MONUMENT - RESERVATIONS SYSTEM PROBLEMS



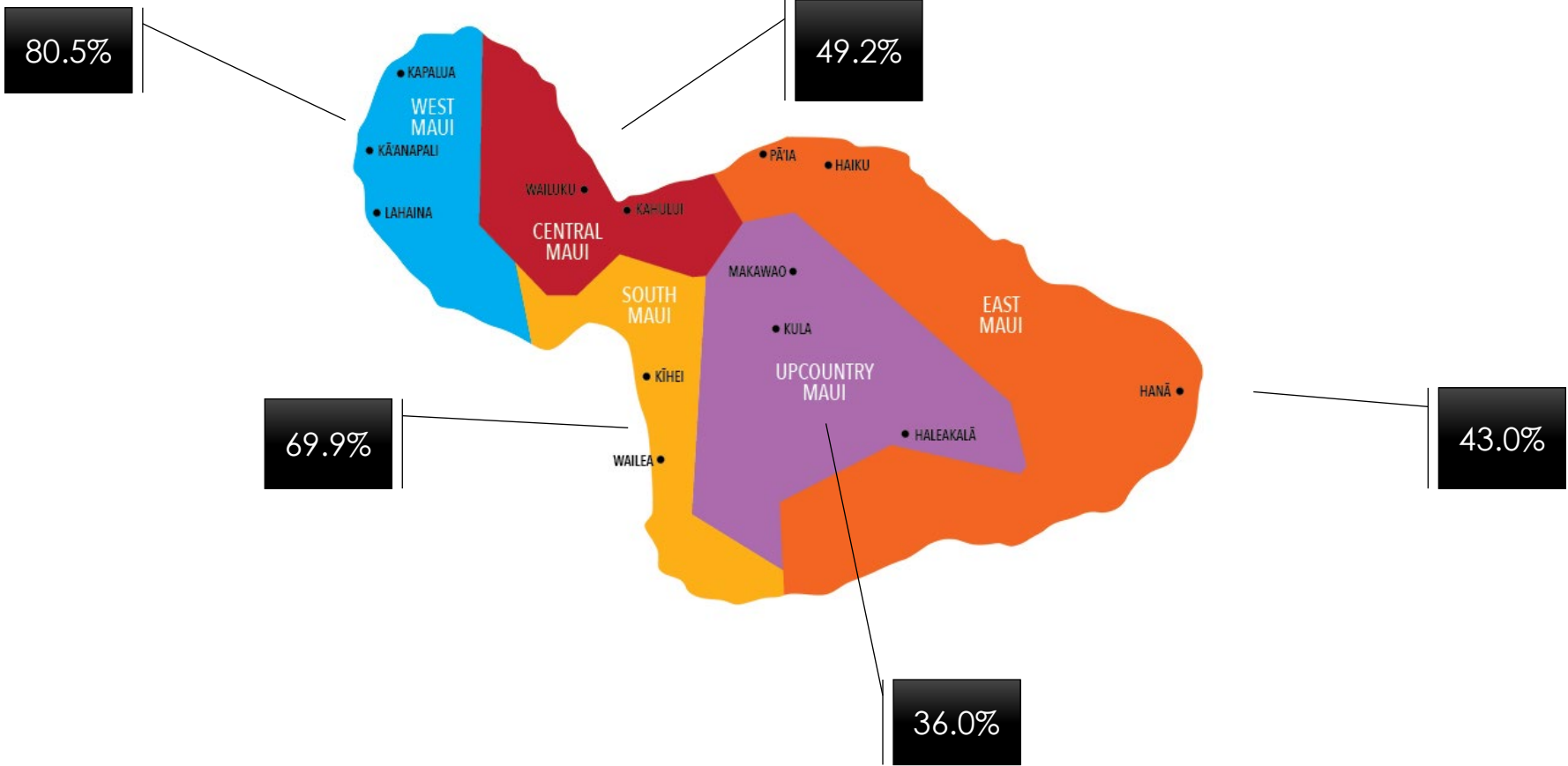
VISITED MAUI FOR SPECIFIC EVENT



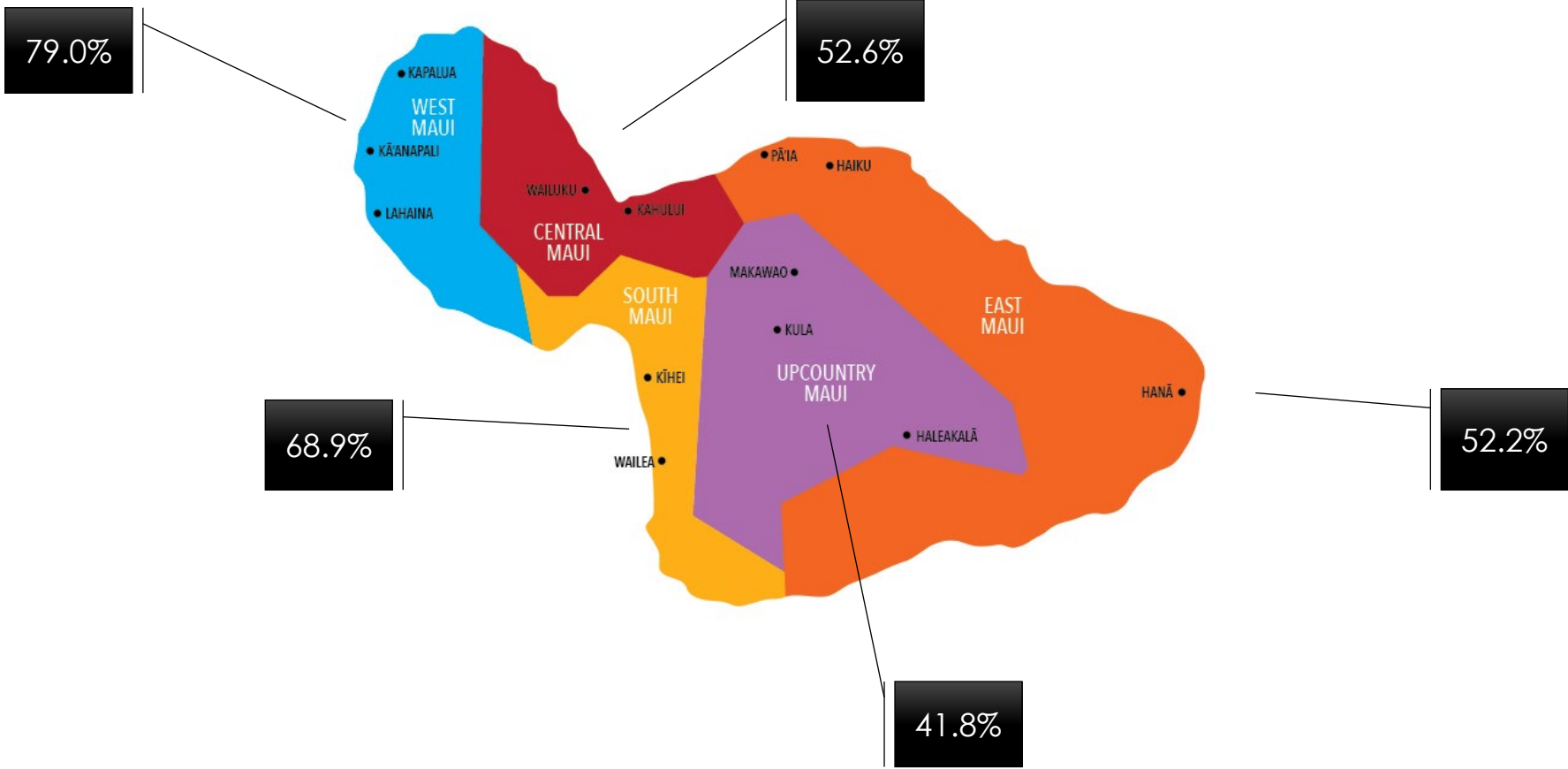
VISITED MAUI FOR SPECIFIC EVENT

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
Hawaii Food and Wine Festival	18.2%	24.9%	0.0%	0.0%	-	-	100.0%	-
Maui Marathon	18.2%	0.0%	0.0%	0.0%	-	-	0.0%	-
Other (please specify festival/ event name)	9.1%	0.0%	0.0%	0.0%	-	-	0.0%	-
Convention/ conference/ retreat/ seminar/ meeting/ workshop/ training/ work event	18.2%	0.0%	0.0%	0.0%	-	-	0.0%	-
Wedding/ honeymoon/ anniversary/ birthday/ funeral/ graduation	0.0%	50.2%	100.0%	100.0%	-	-	0.0%	-
Other Festival/ concert	27.3%	24.9%	0.0%	0.0%	-	-	0.0%	-
Other sporting event	9.1%	0.0%	0.0%	0.0%	-	-	0.0%	-
BASE	11	4	1	1	0	0	1	0

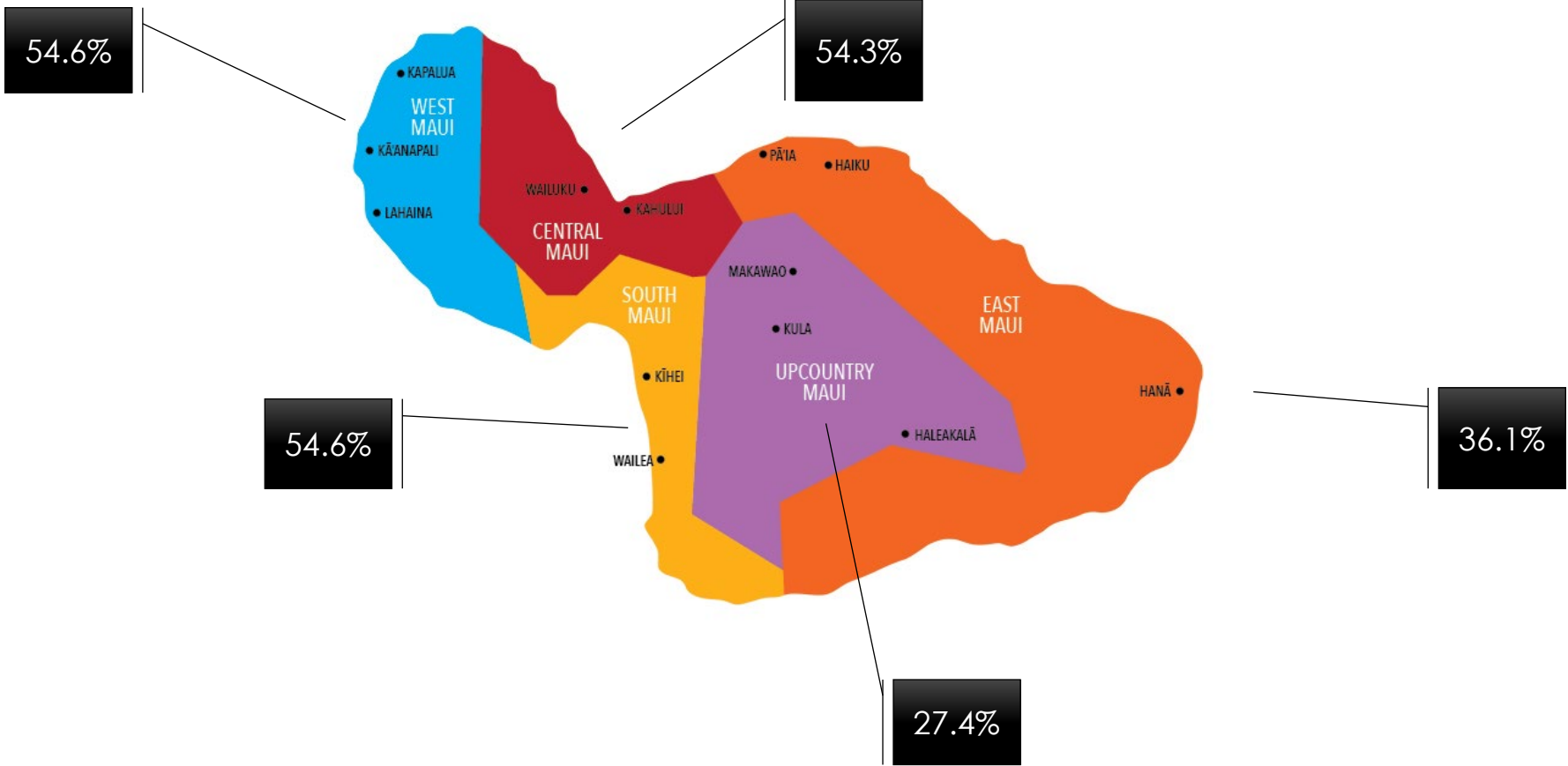
AREAS VISITED - MAUI U.S. WEST



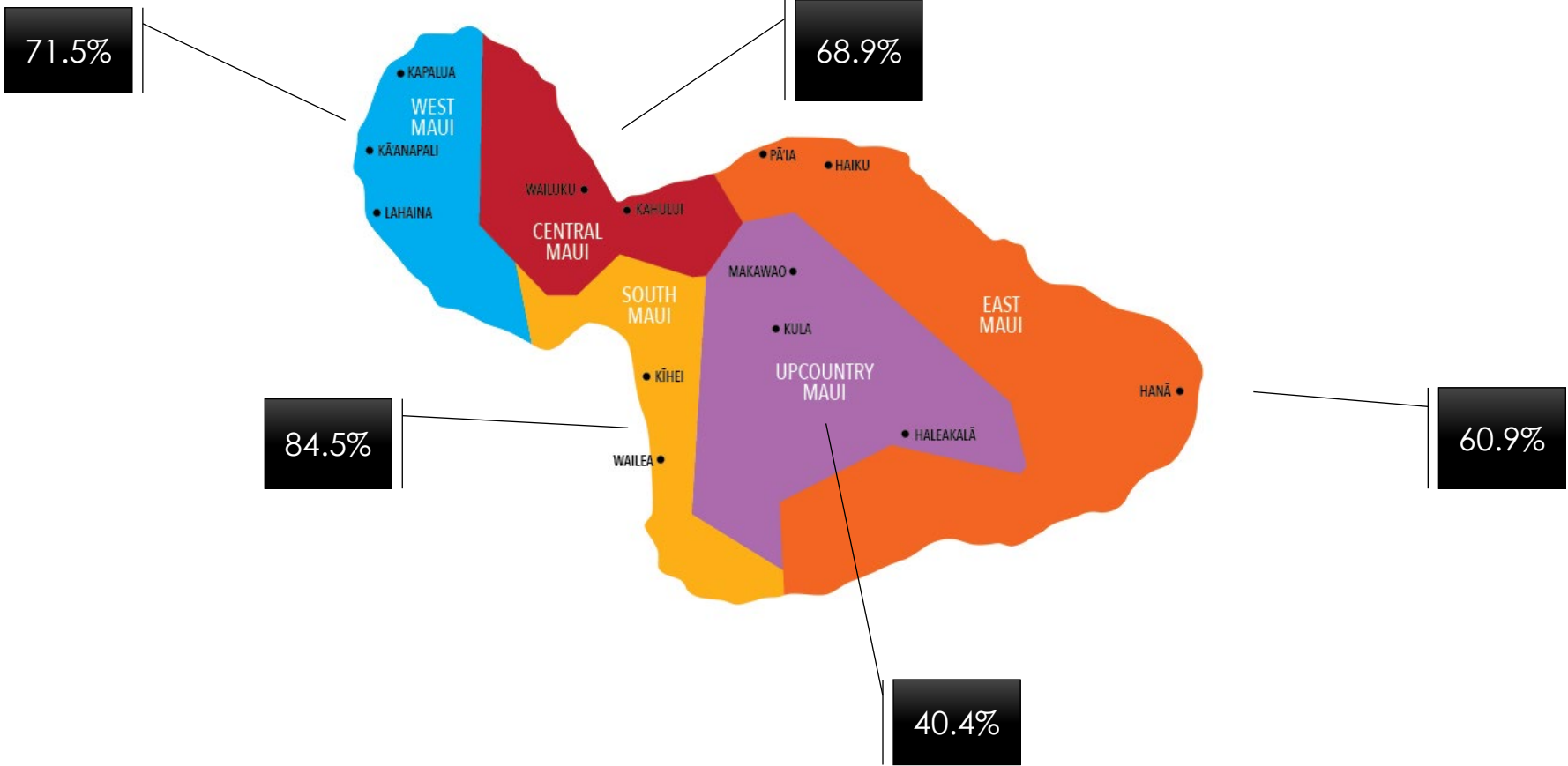
AREAS VISITED - MAUI U.S. EAST



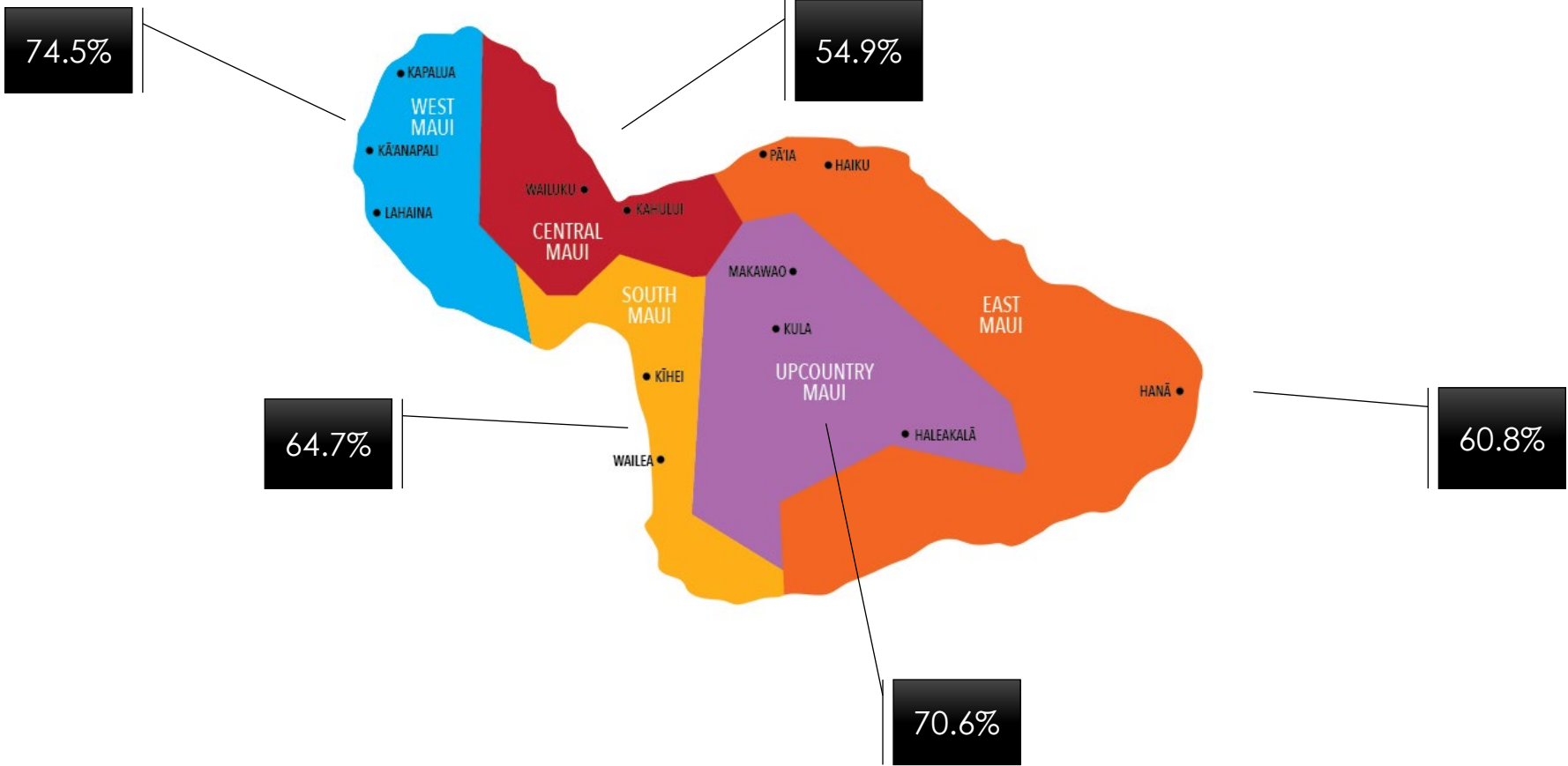
AREAS VISITED - MAUI JAPAN



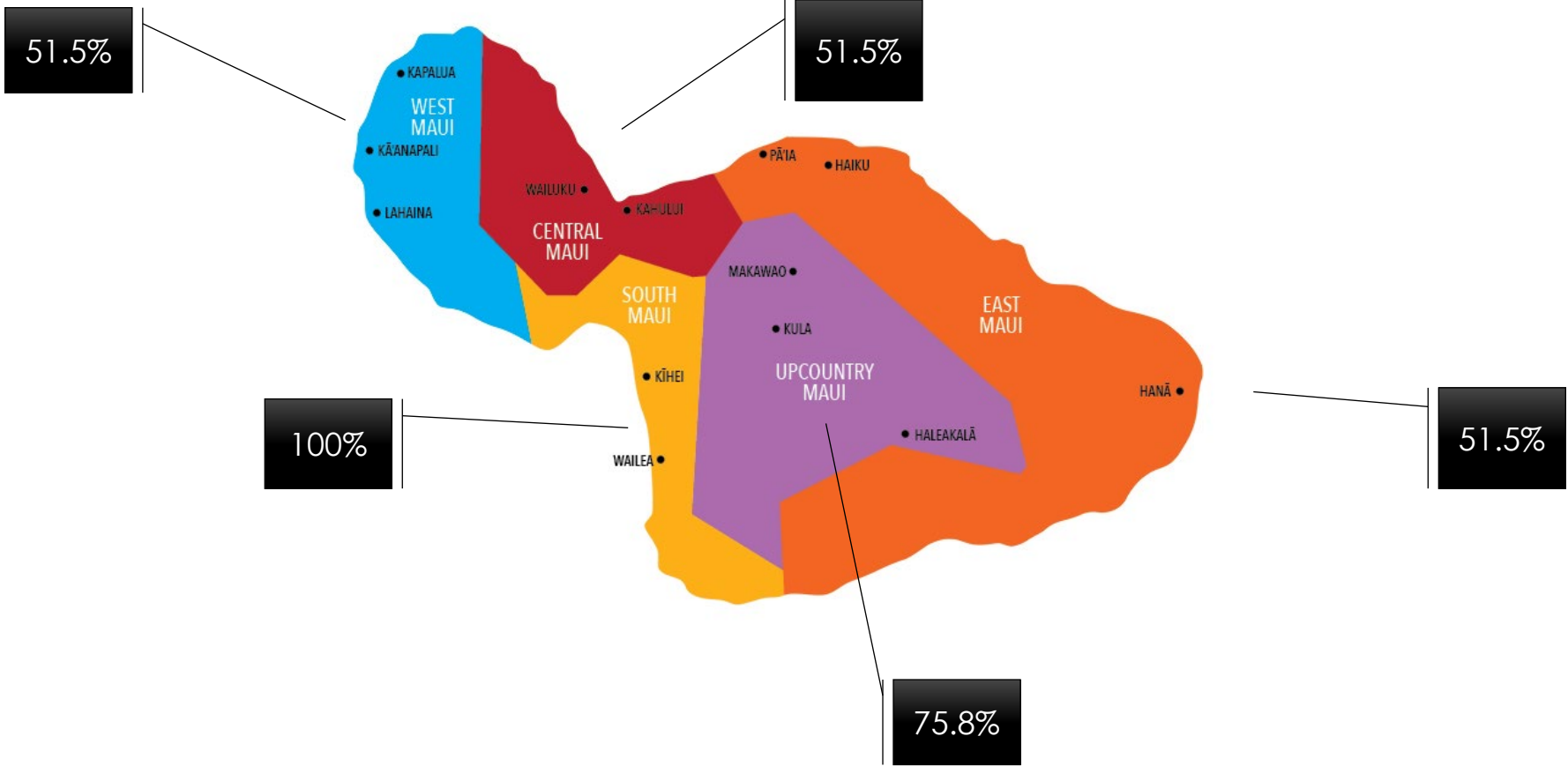
AREAS VISITED - MAUI CANADA



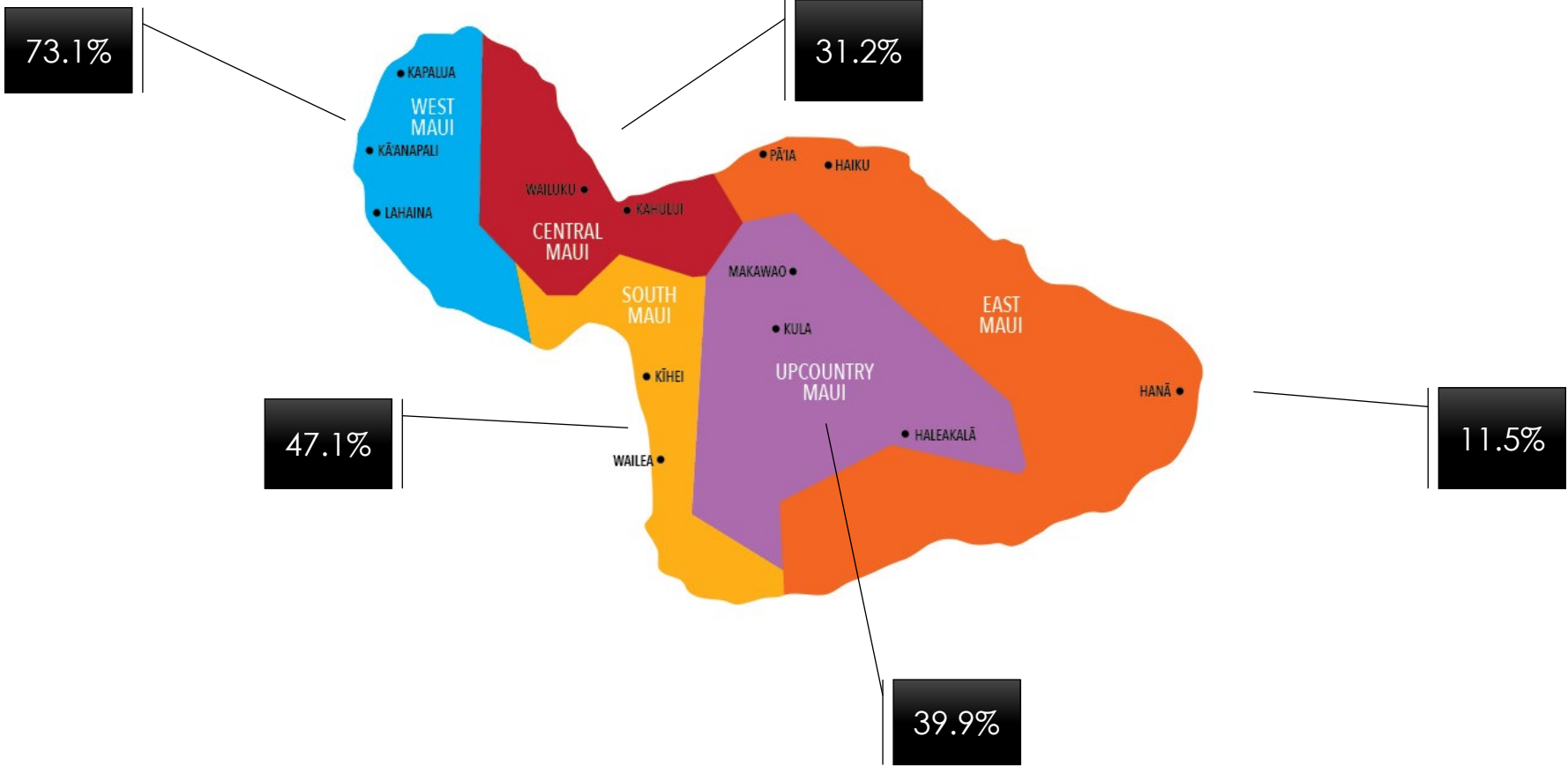
AREAS VISITED - MAUI OCEANIA



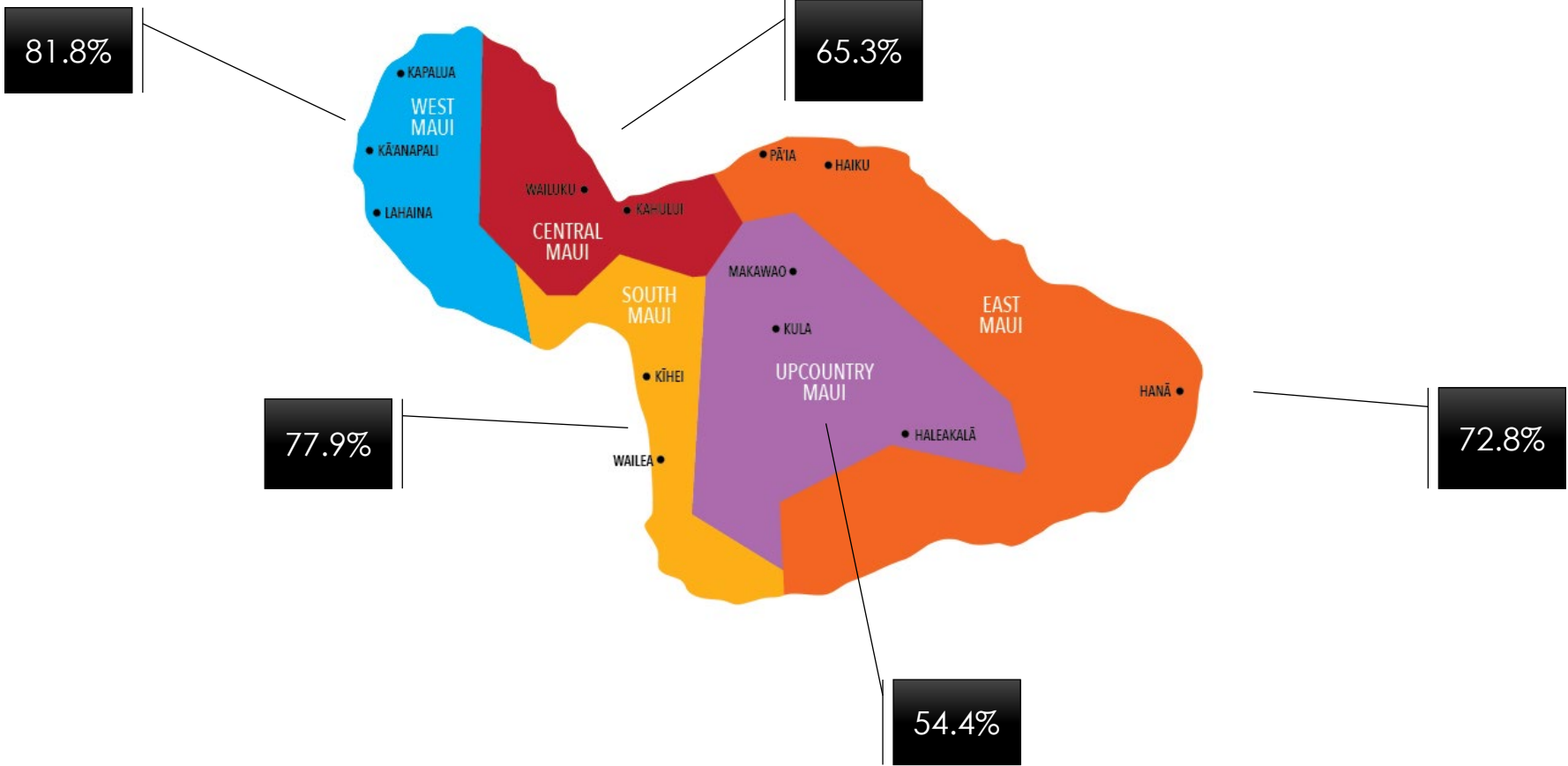
AREAS VISITED - MAUI CHINA



AREAS VISITED - MAUI KOREA



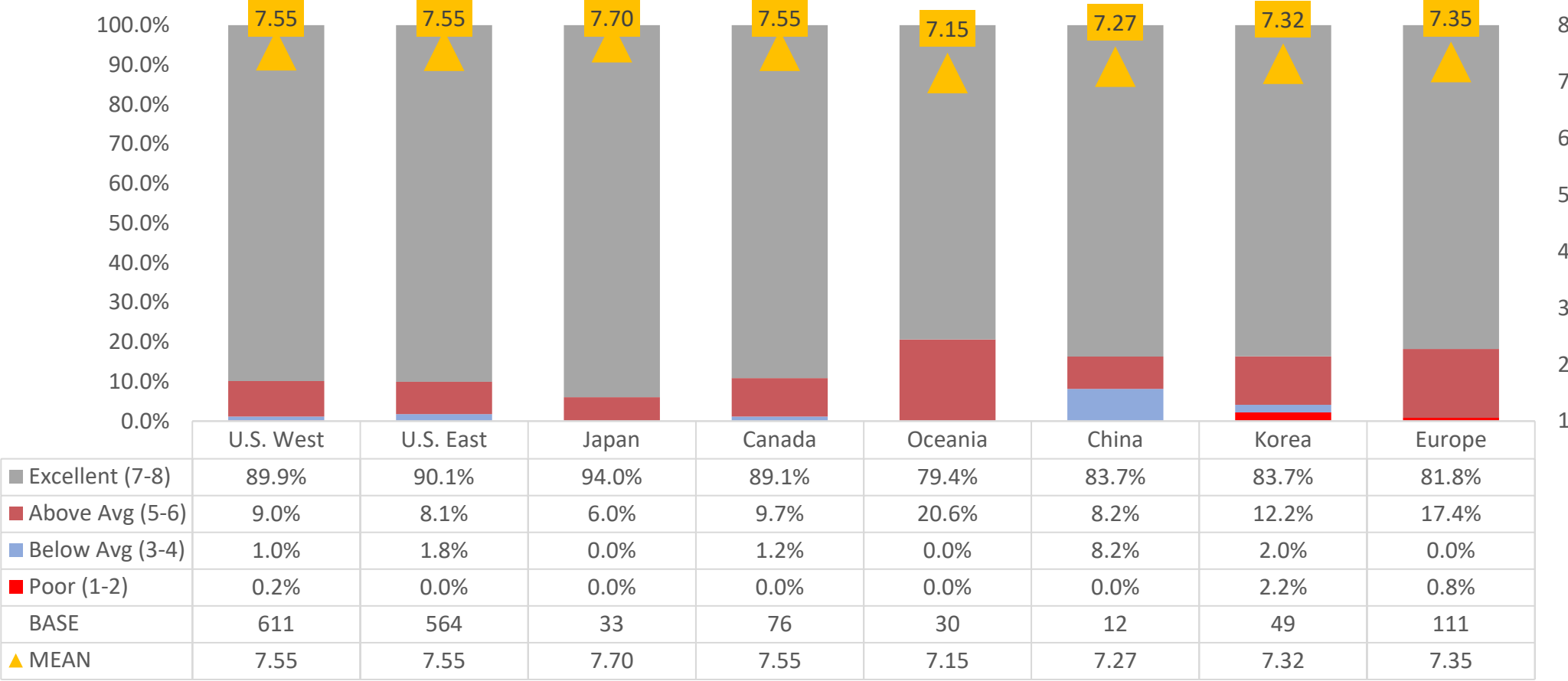
AREAS VISITED - MAUI EUROPE



Section 10 – Island of Hawai‘i

SATISFACTION - ISLAND OF HAWAI‘I

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

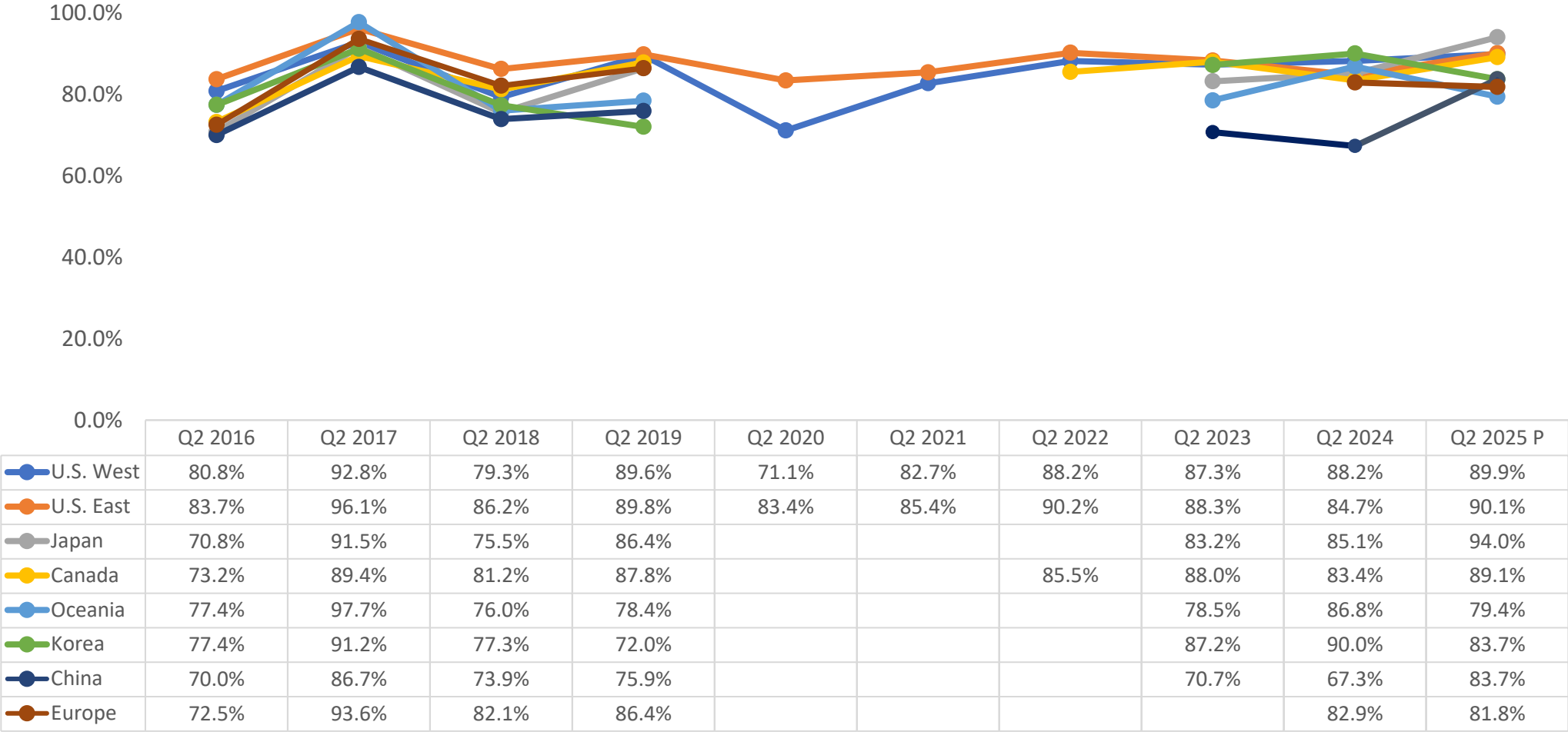


SATISFACTION - ISLAND OF HAWAI'I

- ***Islands visited:*** Visitors from **U.S. West** whose trip was limited to the Island of Hawai'i were more satisfied with their stay than visitors from this market whose trip included stays on multiple islands in addition to the Island of Hawai'i.
- ***Household Income:*** Those visitors from **U.S. West** that reside in homes in the upper income tier (\$150K+) were the most satisfied with their stay on the Island of Hawai'i.

SATISFACTION - ISLAND OF HAWAI‘I

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



P= Preliminary Data

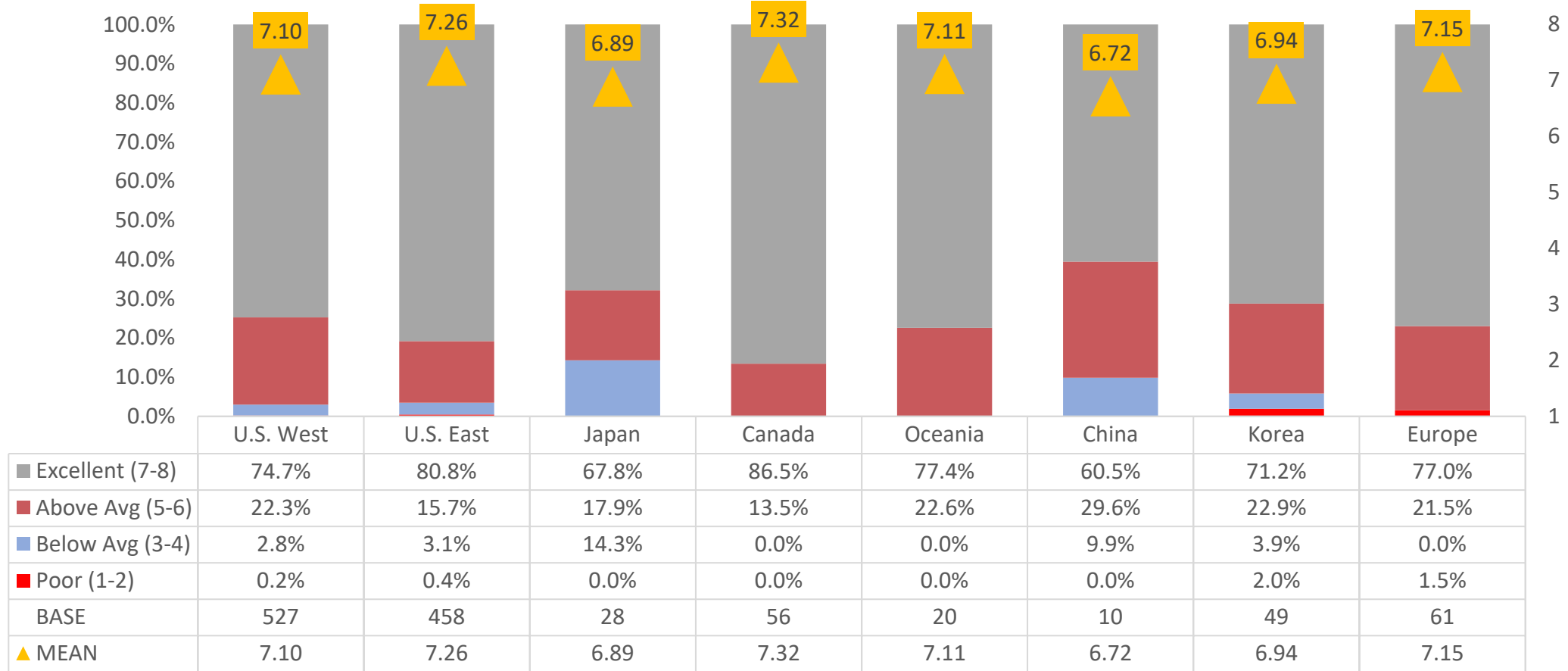
Q. How would you rate your most recent trip to the state of Hawai‘i? How would you rate your experience on___?

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. For Europe, the pandemic resulted in too few travelers in the second half of 2020. Visitors from Europe were not surveyed in 2021 through 2023.



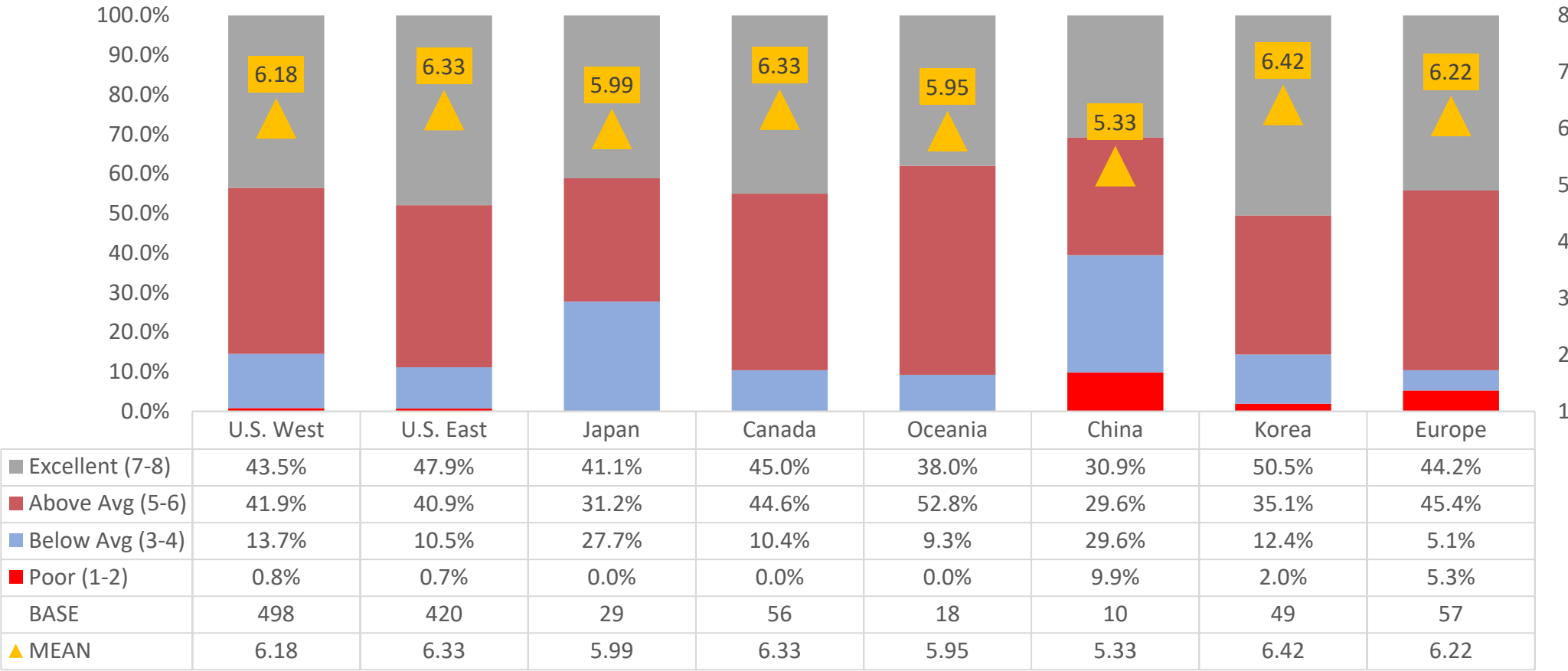
ENTERTAINMENT/ ATTRACTIONS - ISLAND OF HAWAI‘I

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



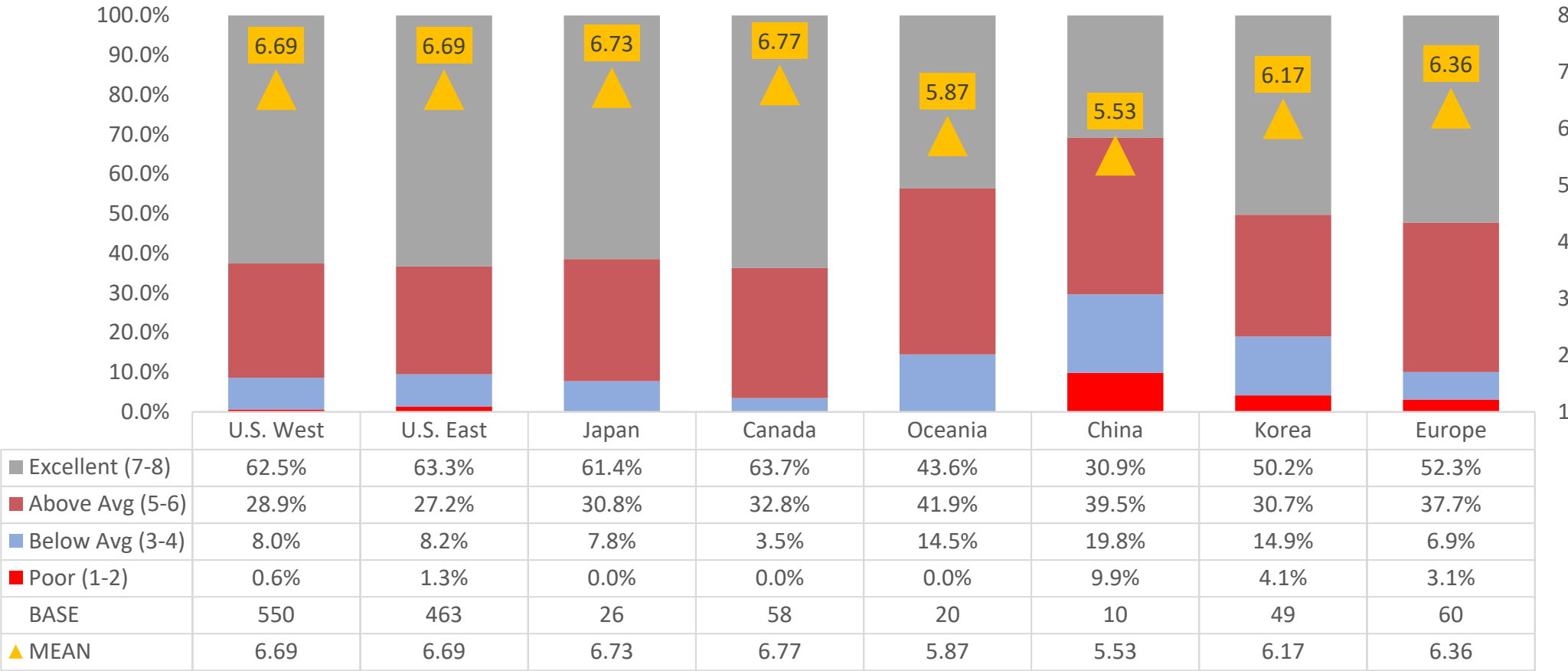
SHOPPING - ISLAND OF HAWAI‘I

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



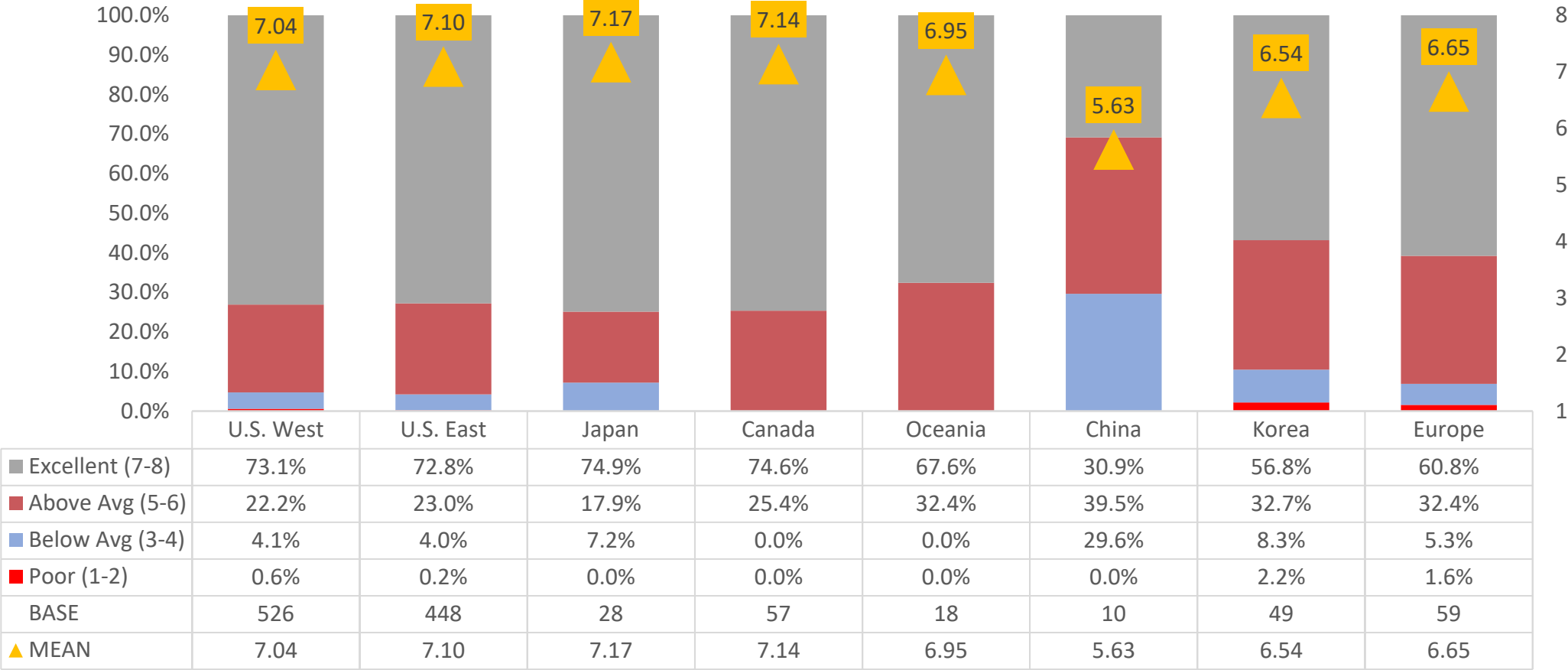
DINING/ FOOD & BEVERAGE - ISLAND OF HAWAI‘I

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



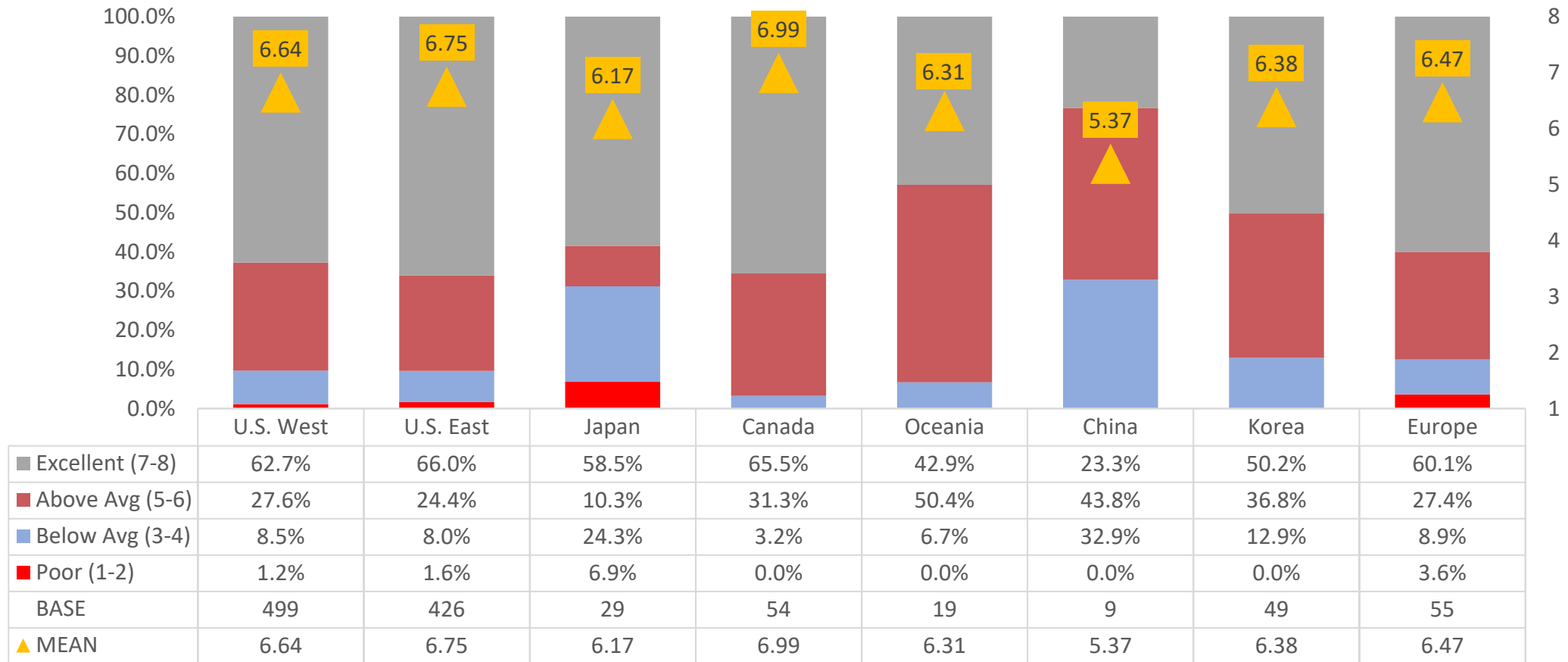
LODGING/ ACCOMMODATIONS - ISLAND OF HAWAI‘I

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



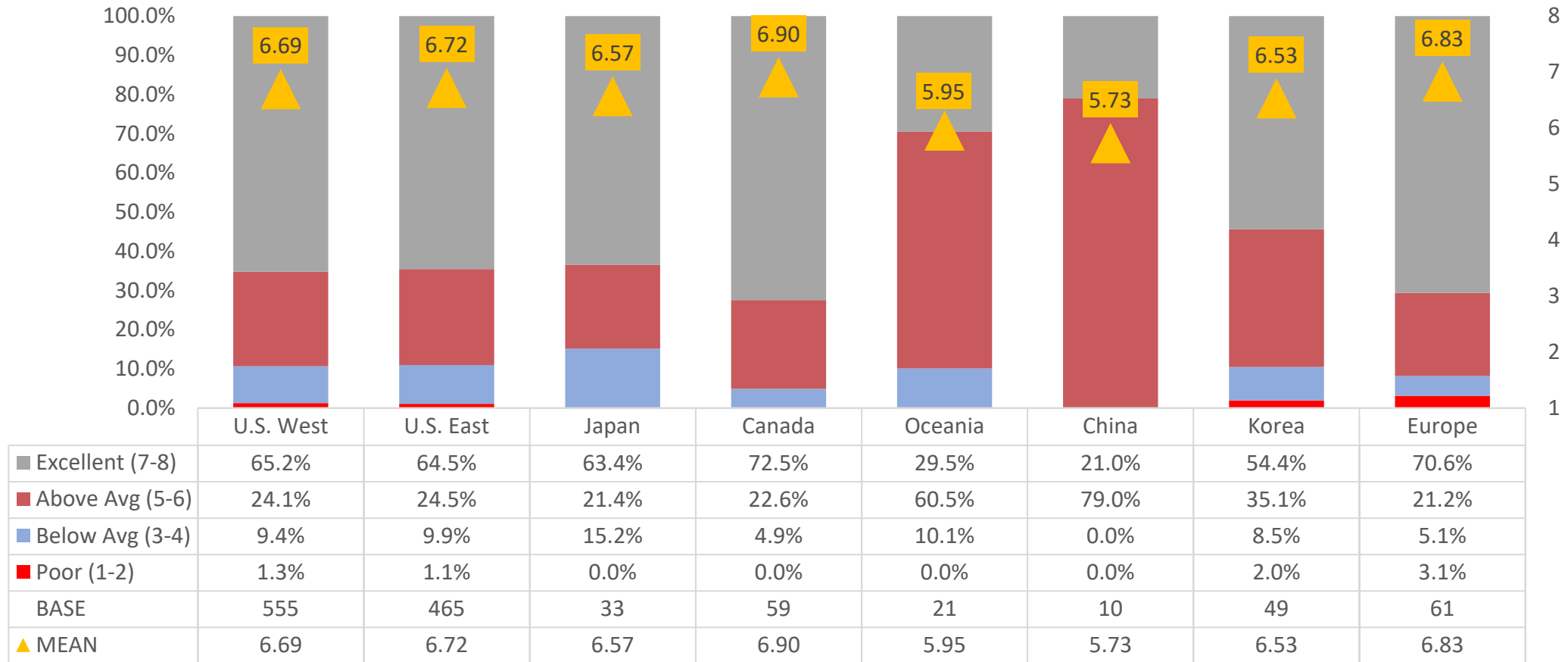
TRANSPORTATION ON ISLAND - ISLAND OF HAWAI'I

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



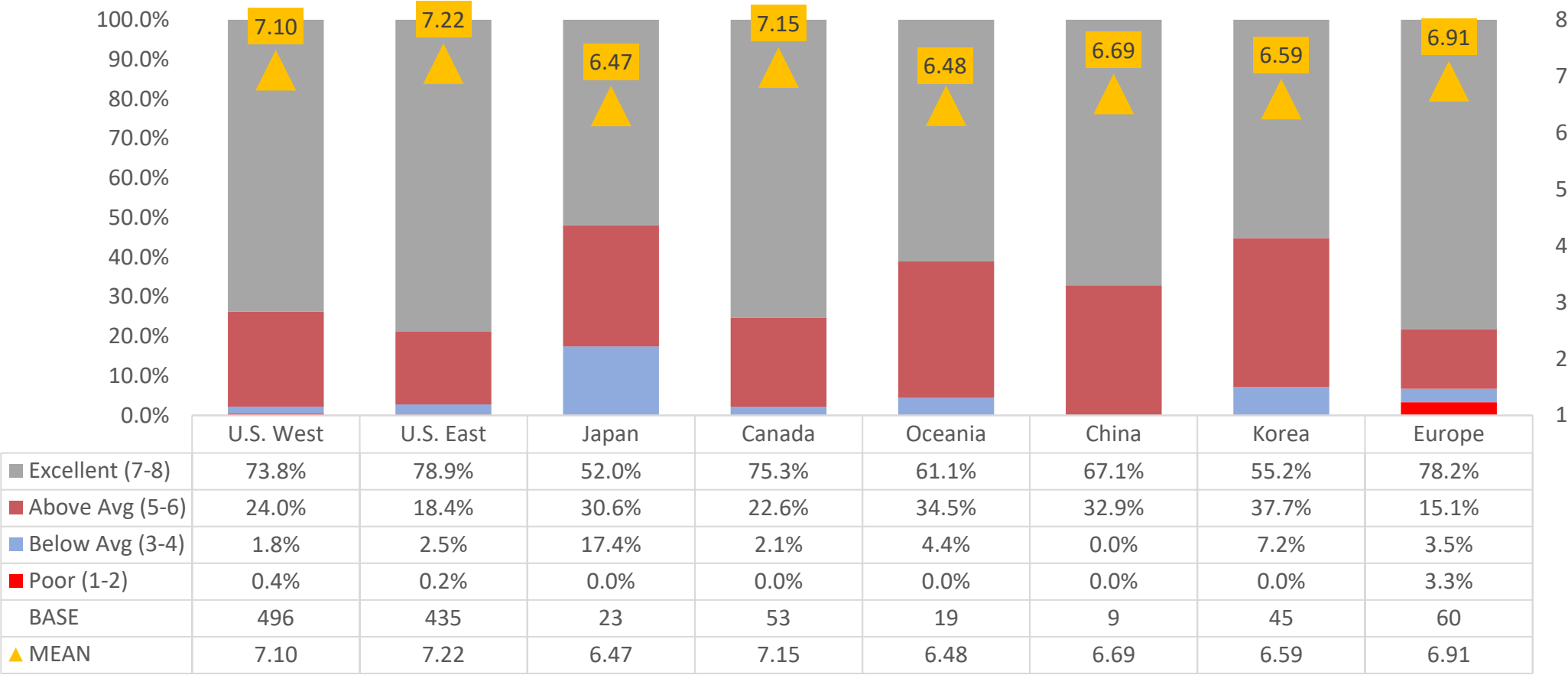
AIRPORT - ISLAND OF HAWAI'I

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



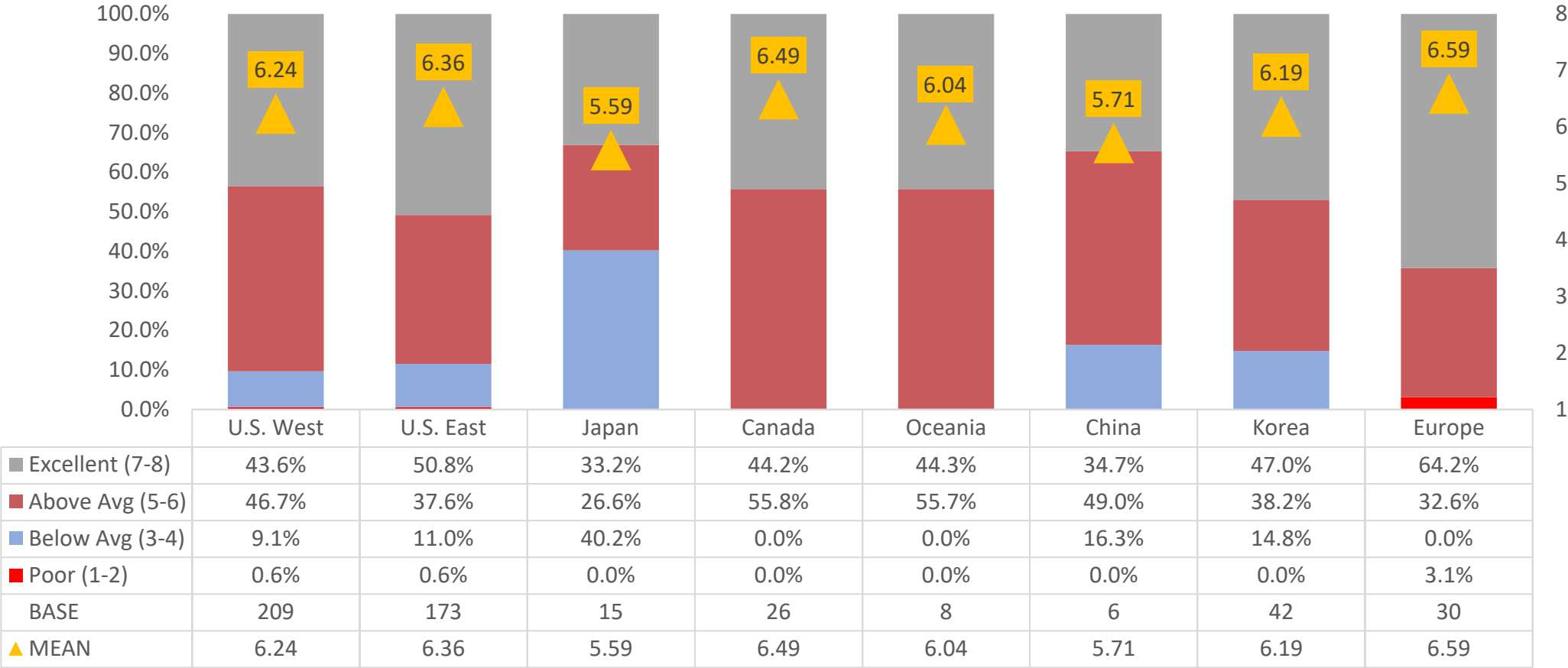
CULTURAL EXPERIENCES ON ISLAND - ISLAND OF HAWAI‘I

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



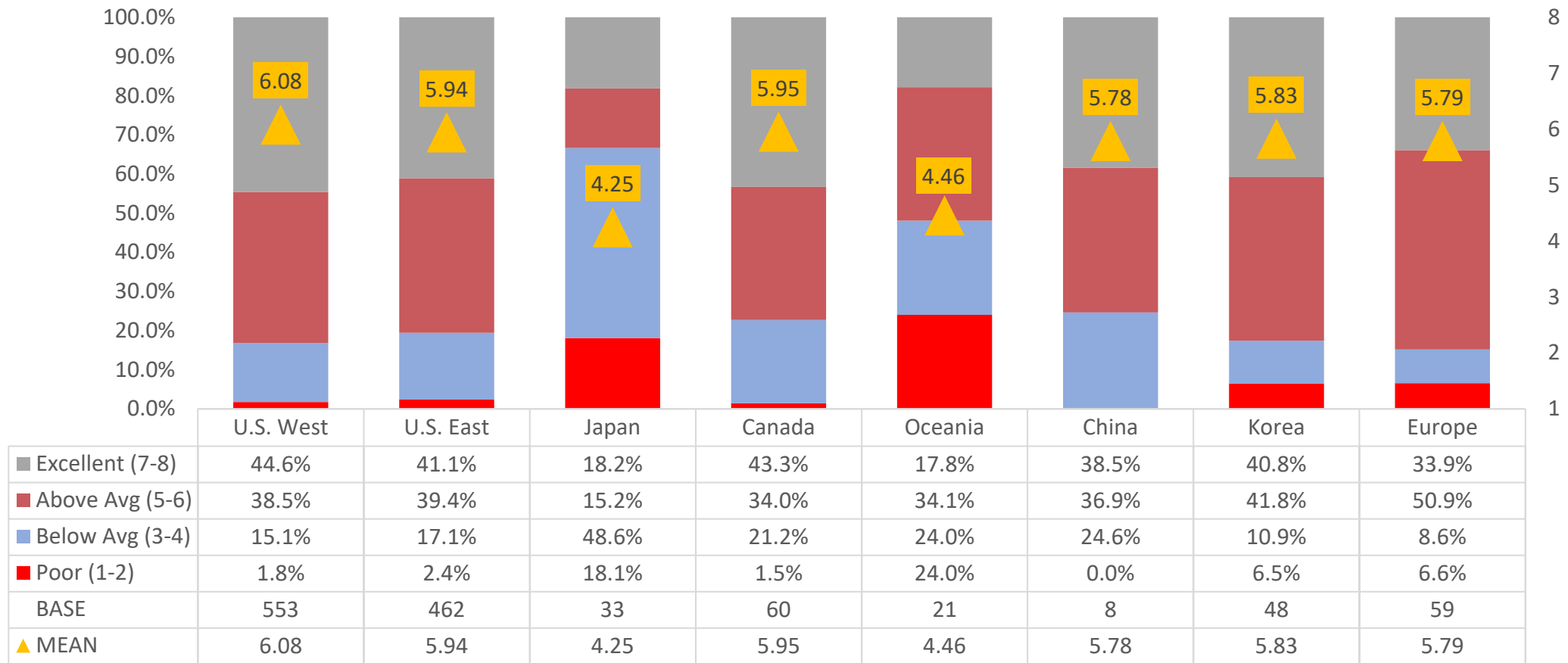
VOLUNTEER EXPERIENCES ON ISLAND - ISLAND OF HAWAI‘I

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



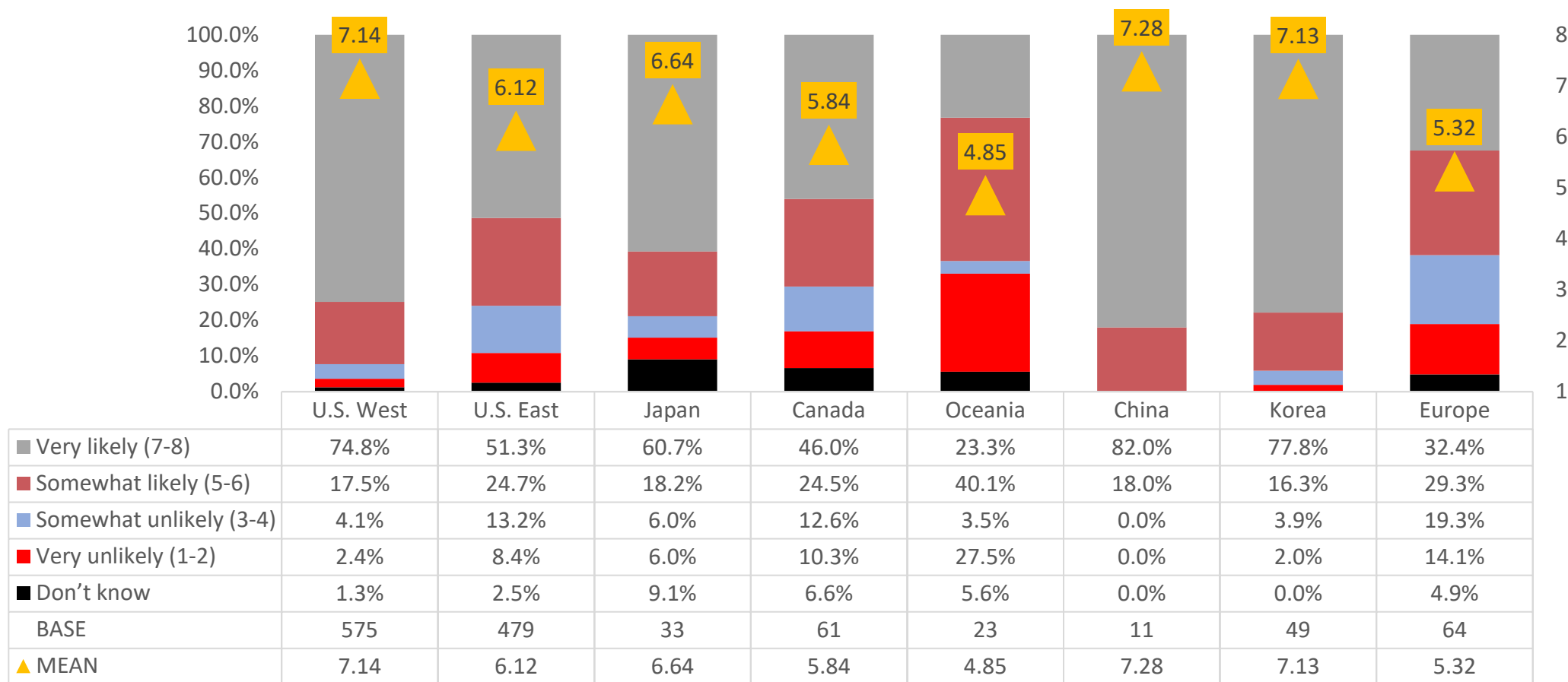
VALUE FOR THE MONEY ON ISLAND - ISLAND OF HAWAI'I

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



LIKELIHOOD OF RETURN VISIT - ISLAND OF HAWAI‘I

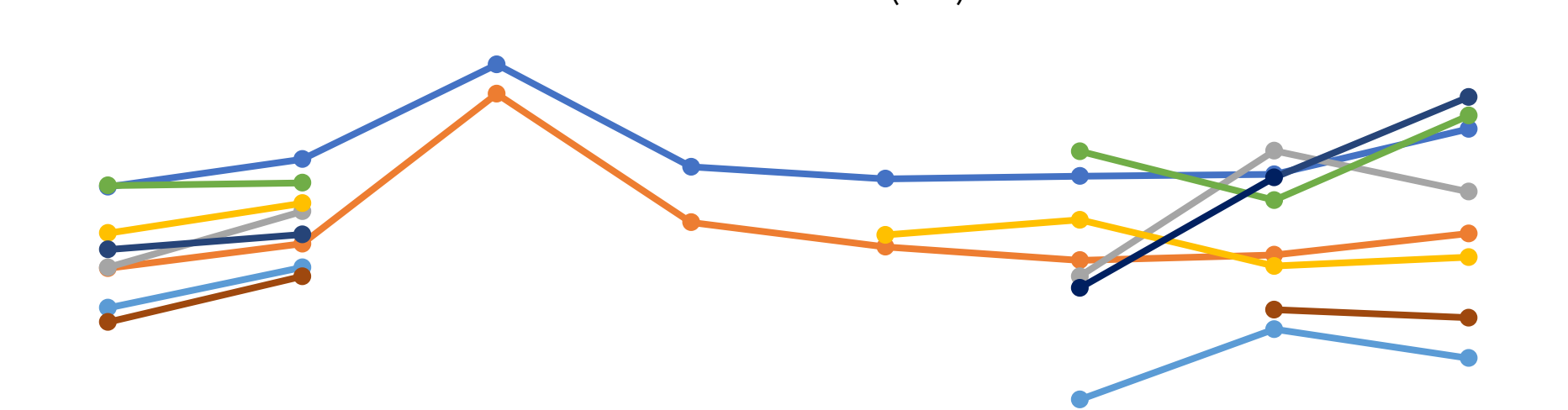
8-pt Rating Scale
8=Very likely/ 1=Very unlikely



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	Q2 2025 P
U.S. West	61.8%	68.0%	89.3%	66.3%	63.6%	64.2%	64.6%	74.8%
U.S. East	43.5%	49.0%	82.7%	53.8%	48.3%	45.3%	46.5%	51.3%
Japan	43.7%	56.3%				41.7%	69.9%	60.7%
Canada	51.4%	58.1%			51.0%	54.4%	44.0%	46.0%
Oceania	34.6%	43.7%				14.0%	29.8%	23.3%
Korea	62.1%	62.7%				69.8%	58.8%	77.8%
China	47.7%	51.1%				39.1%	63.9%	82.0%
Europe	31.4%	41.7%					34.2%	32.4%

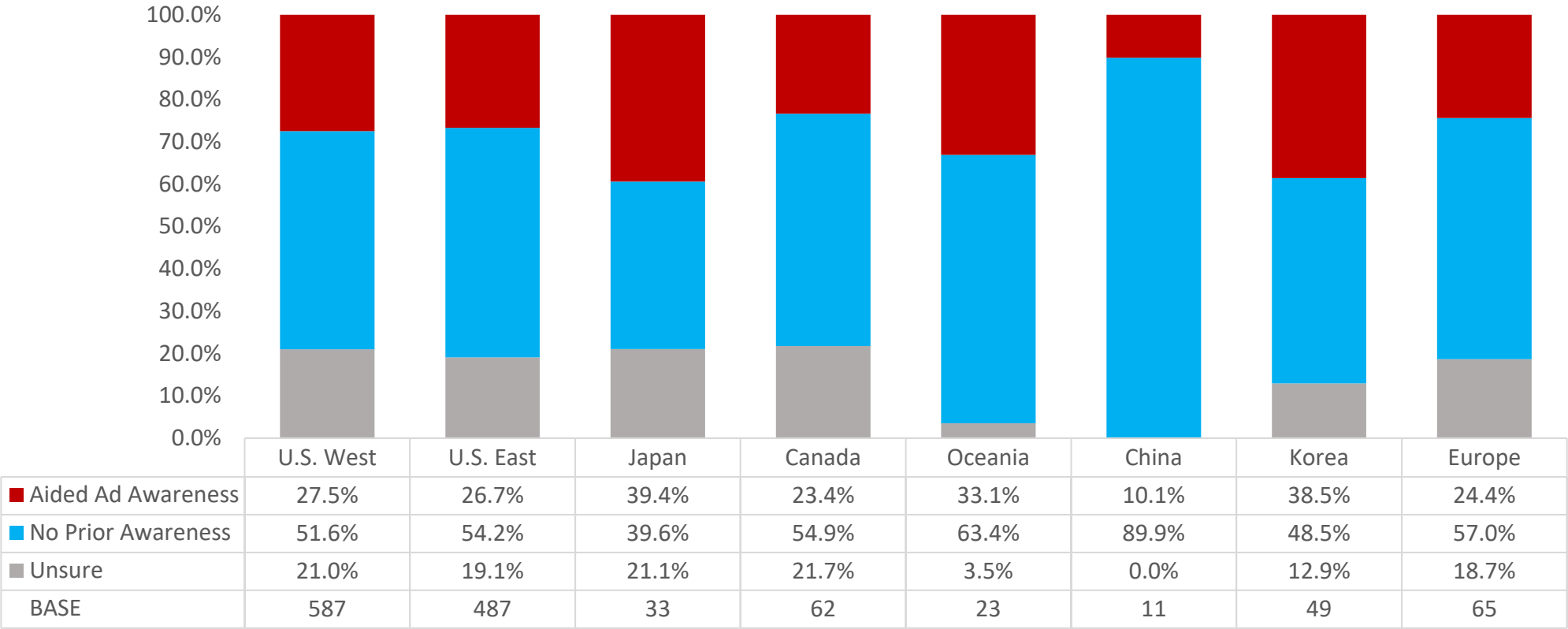
P= Preliminary Data

Q. How likely are you to visit the island of Hawai'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. For Europe, the pandemic resulted in too few travelers in the second half of 2020. Visitors from Europe were not surveyed in 2021 through 2023.



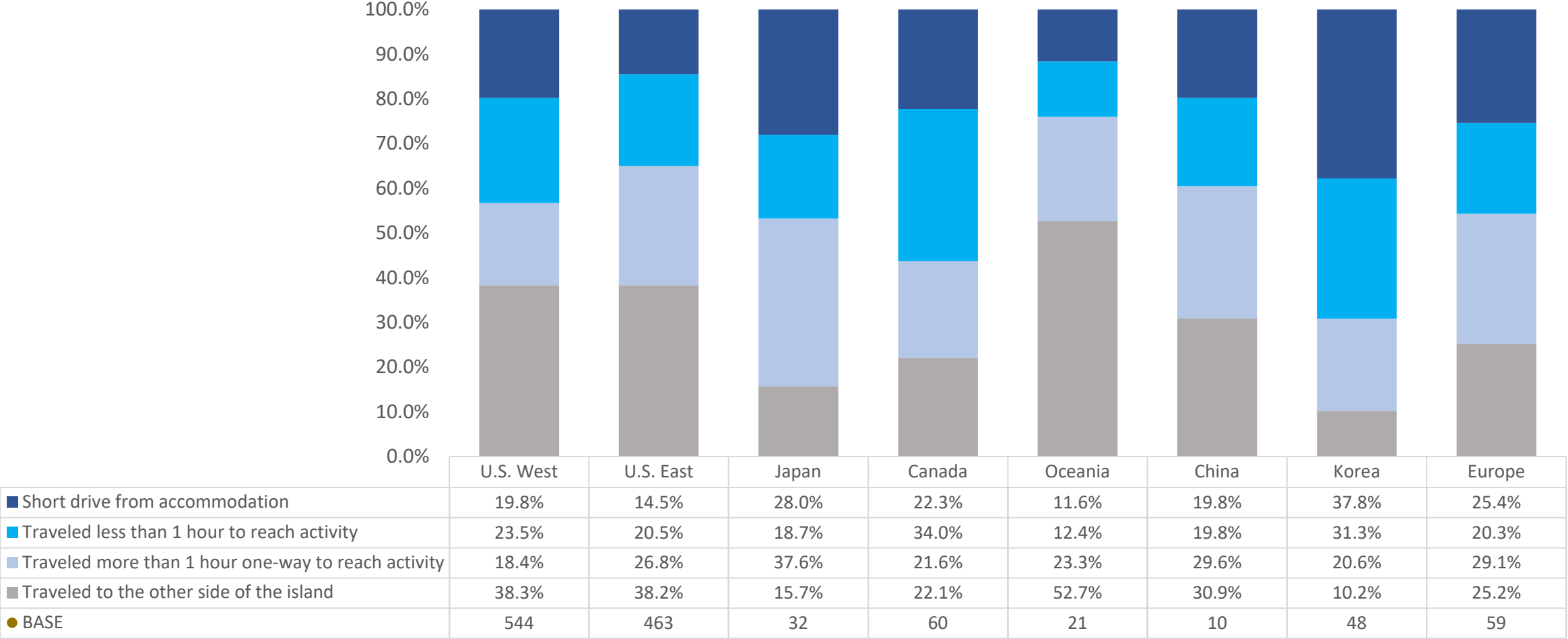
AIDED ADVERTISING AWARENESS - ISLAND OF HAWAI‘I



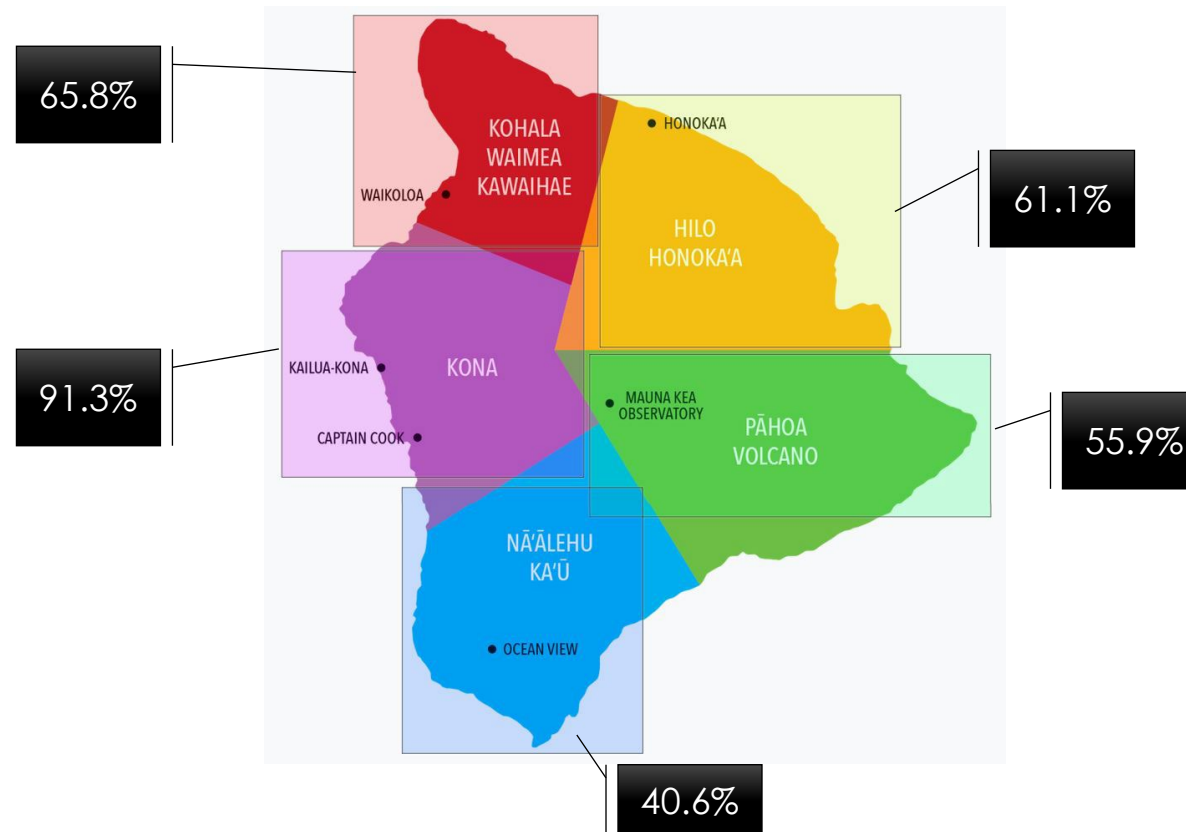
MOTIVATING FACTORS – ISLAND OF HAWAI‘I

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
Television programs or movies filmed in Hawai‘i	9.0%	11.9%	24.4%	26.4%	11.3%	0.0%	19.8%	22.0%
Hawaiian music	15.1%	11.7%	9.1%	14.0%	3.5%	0.0%	8.3%	15.2%
Social media posts and videos	15.2%	15.0%	33.4%	9.8%	20.4%	9.0%	32.2%	15.6%
Outdoor or sporting activities and events	18.3%	17.7%	9.1%	13.4%	9.2%	19.1%	10.2%	16.8%
Hawaiian cultural experiences and Hawaiian cultural events	28.4%	27.5%	3.1%	25.0%	9.2%	19.1%	6.1%	17.8%
Famous landmarks or imagery/ natural beauty (beaches, mountains, etc.)	53.7%	59.3%	60.6%	50.6%	65.5%	82.0%	72.0%	72.2%
Attend a festival or other event	4.9%	5.3%	3.1%	3.3%	0.0%	27.0%	4.1%	7.4%
BASE	587	487	33	62	23	11	49	65

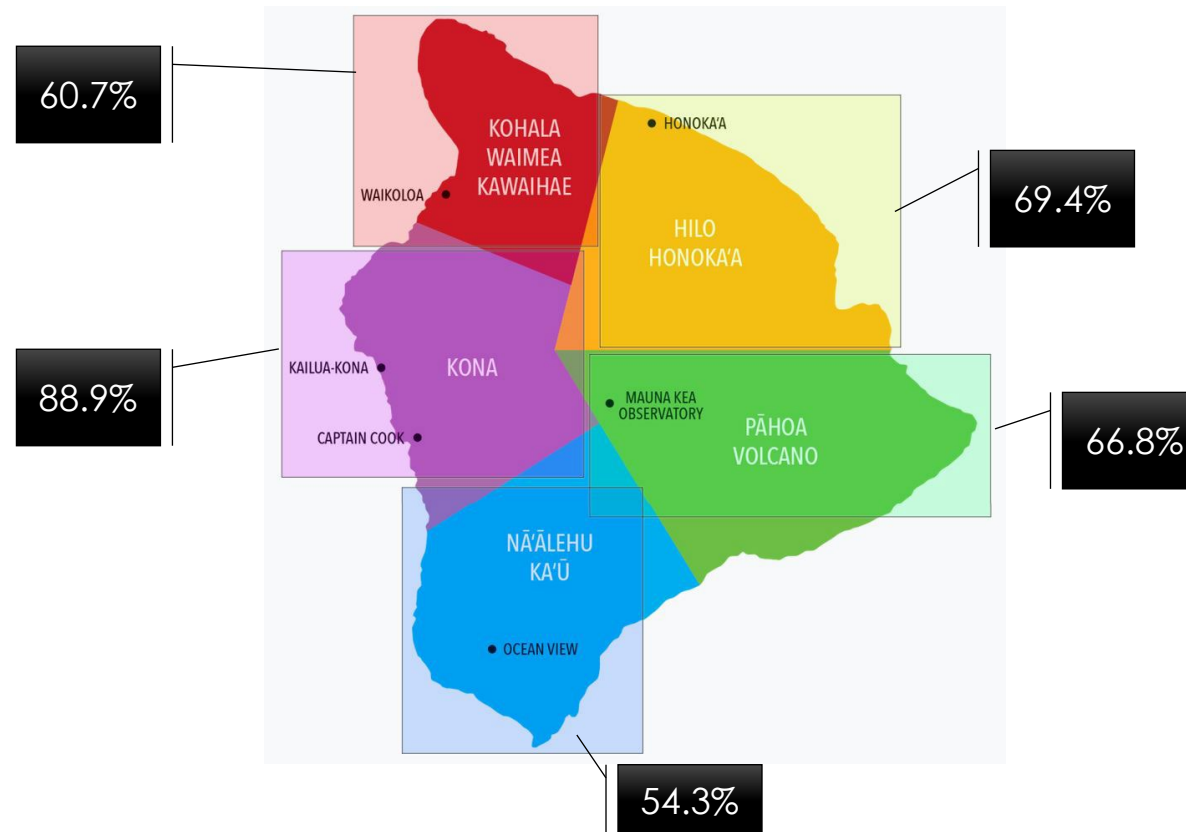
TRAVEL ON ISLAND OF HAWAI‘I



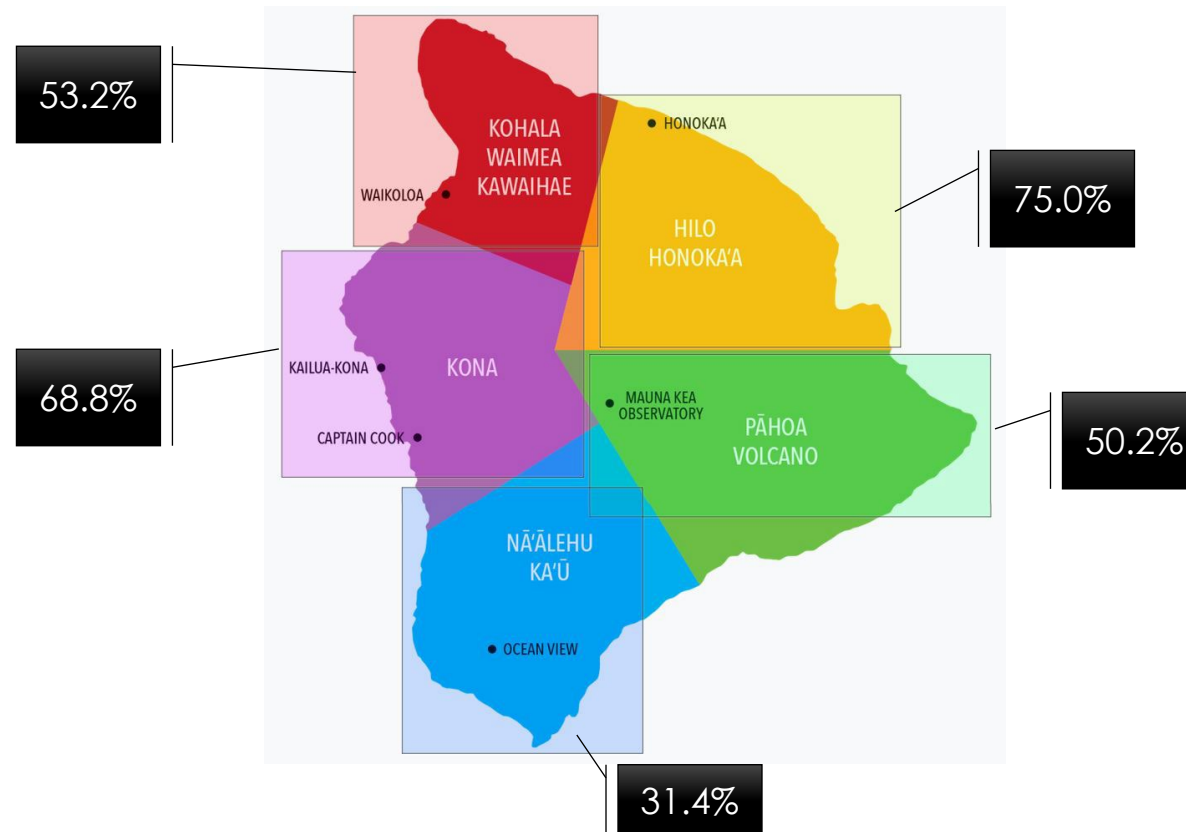
AREAS VISITED - ISLAND OF HAWAI'I U.S. WEST



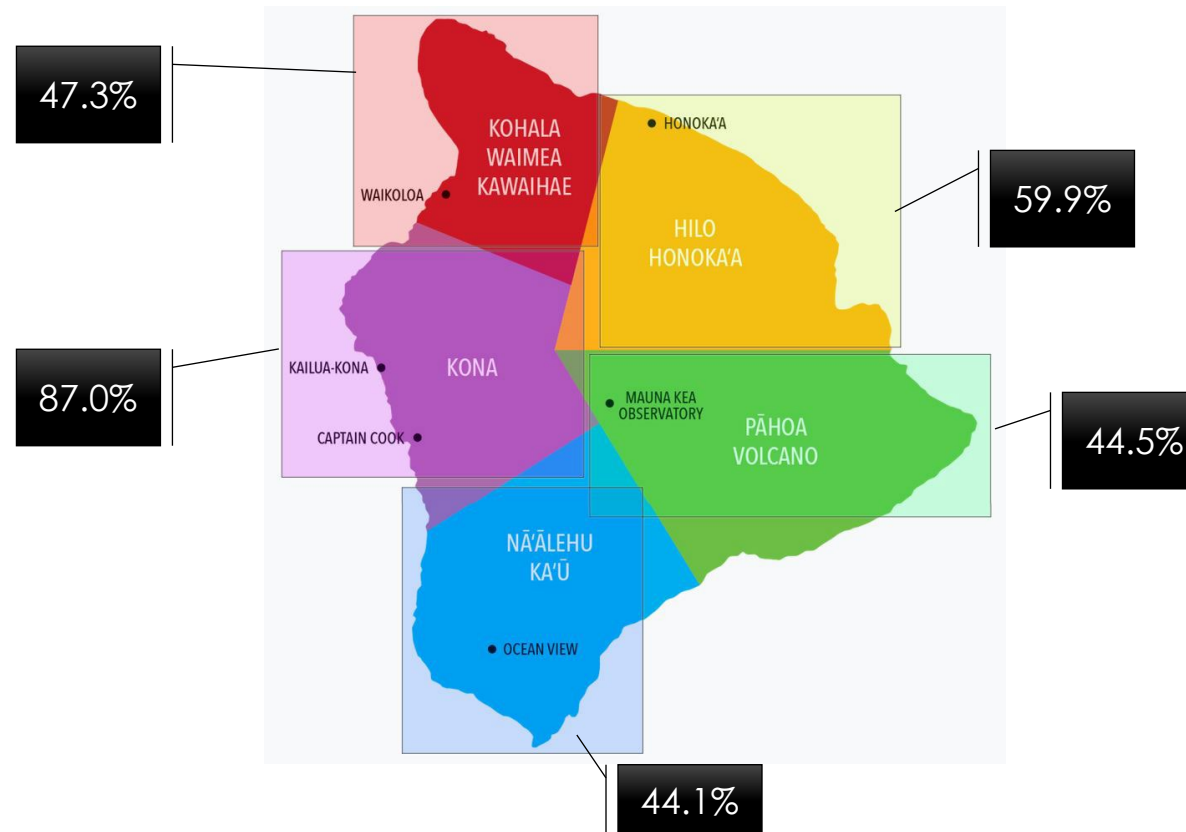
AREAS VISITED - ISLAND OF HAWAI'I U.S. EAST



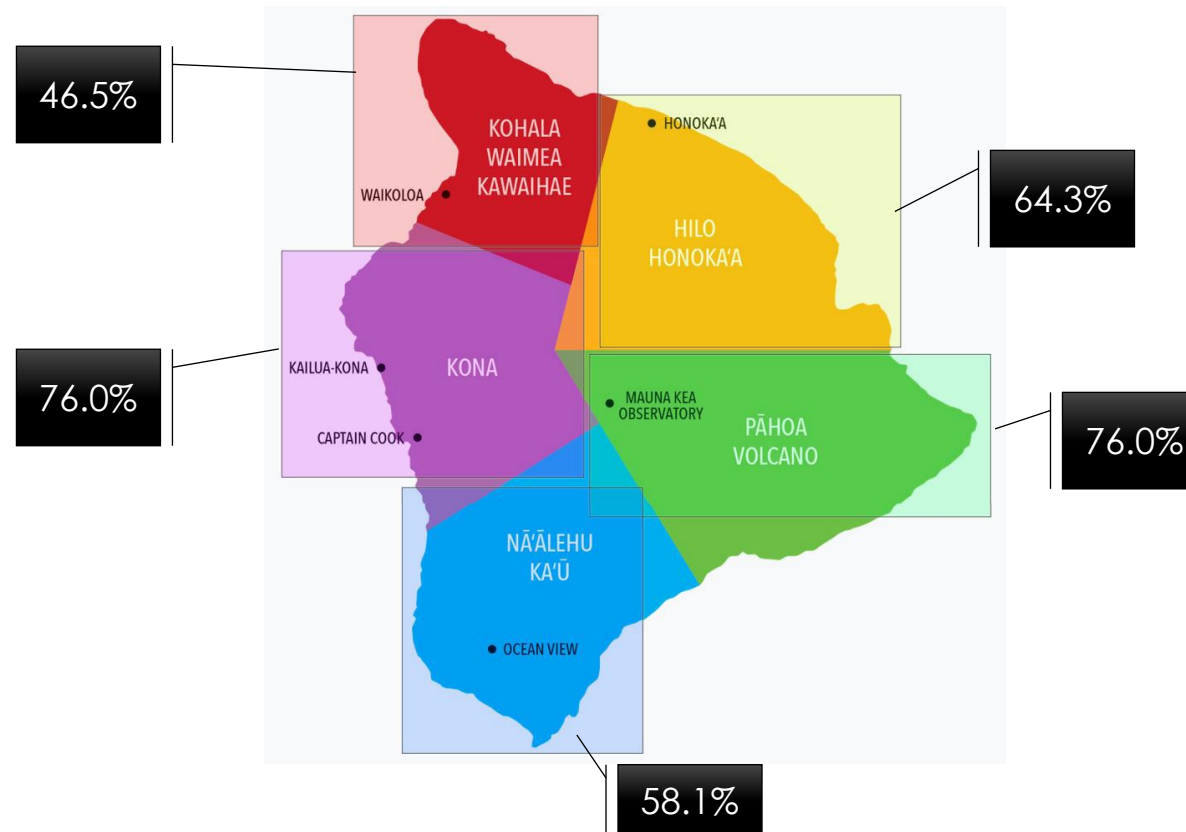
AREAS VISITED - ISLAND OF HAWAI'I JAPAN



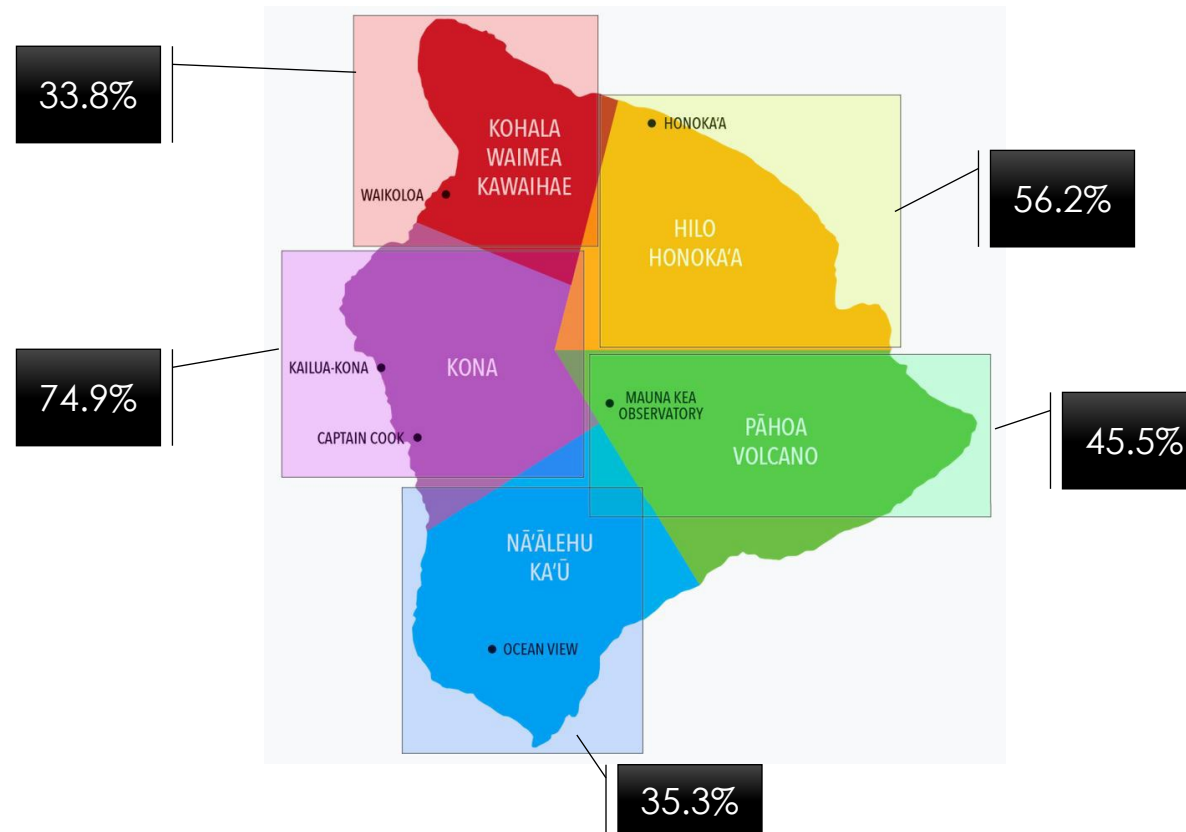
AREAS VISITED - ISLAND OF HAWAI'I CANADA



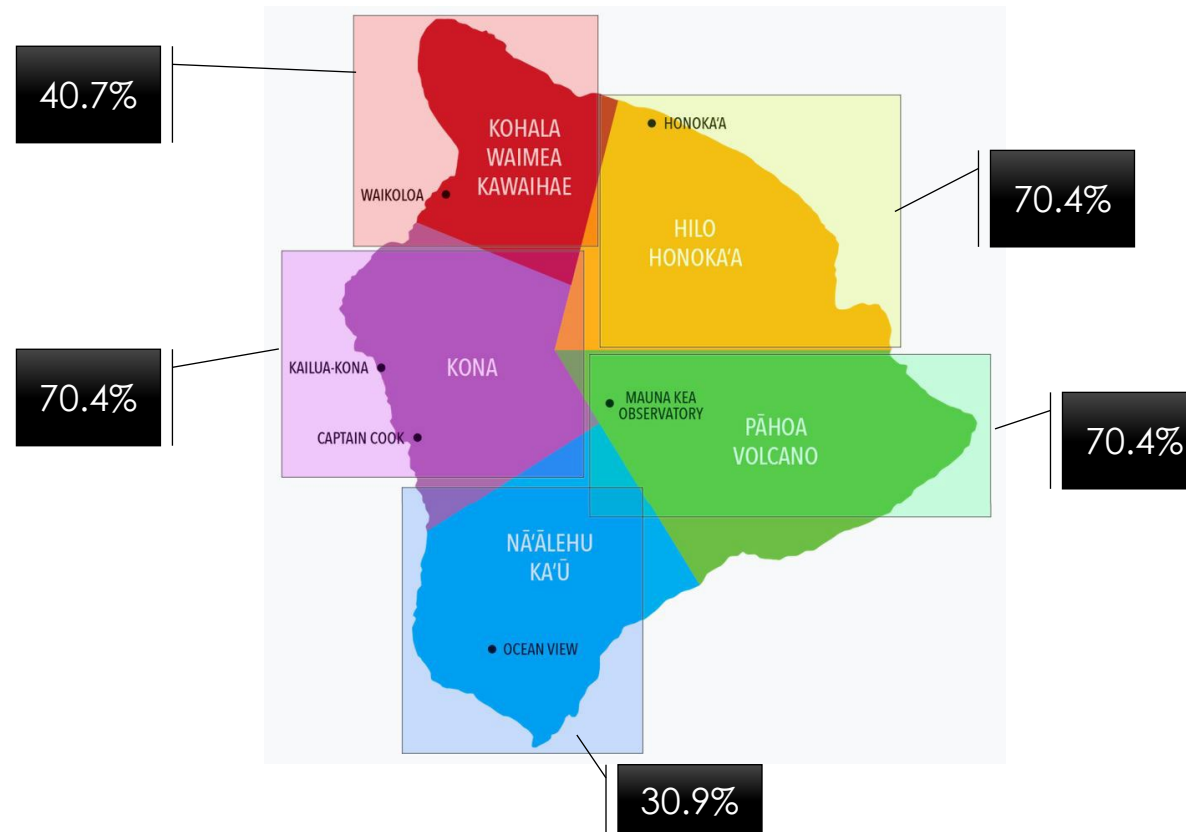
AREAS VISITED - ISLAND OF HAWAI'I OCEANIA



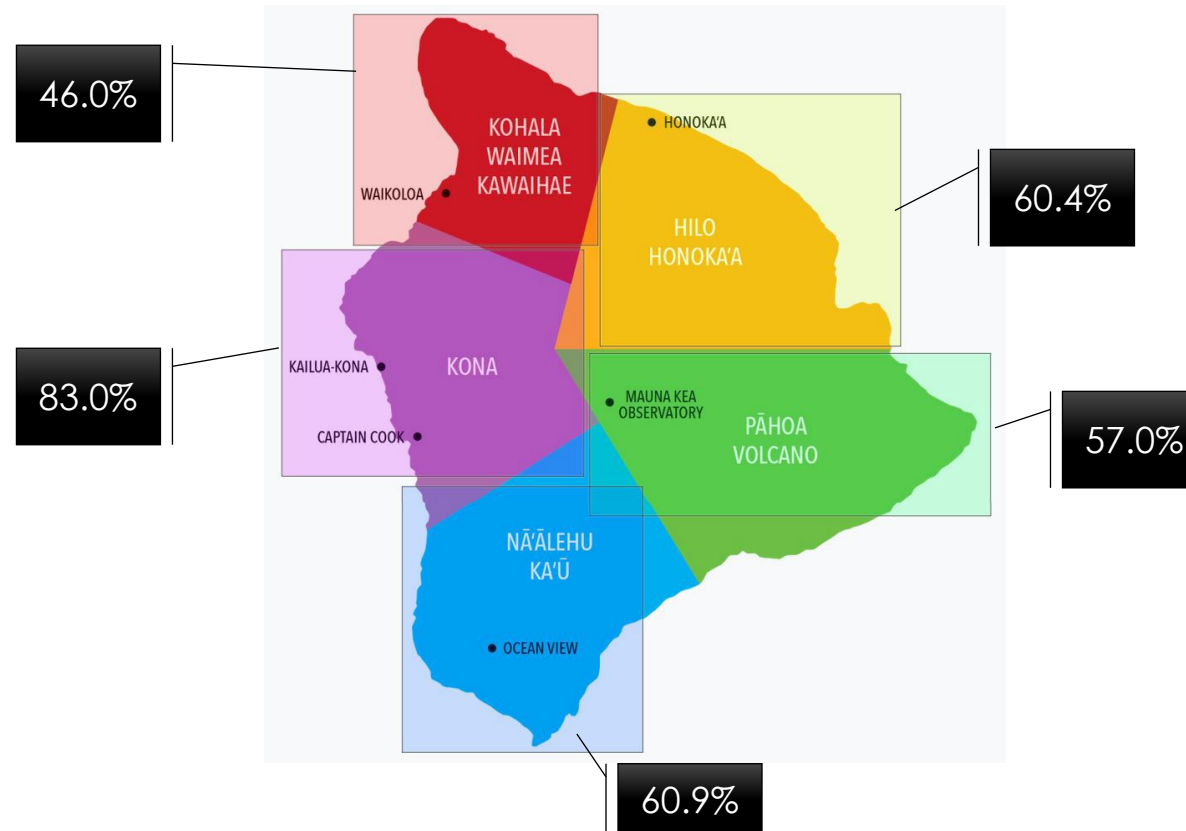
AREAS VISITED - ISLAND OF HAWAI'I KOREA



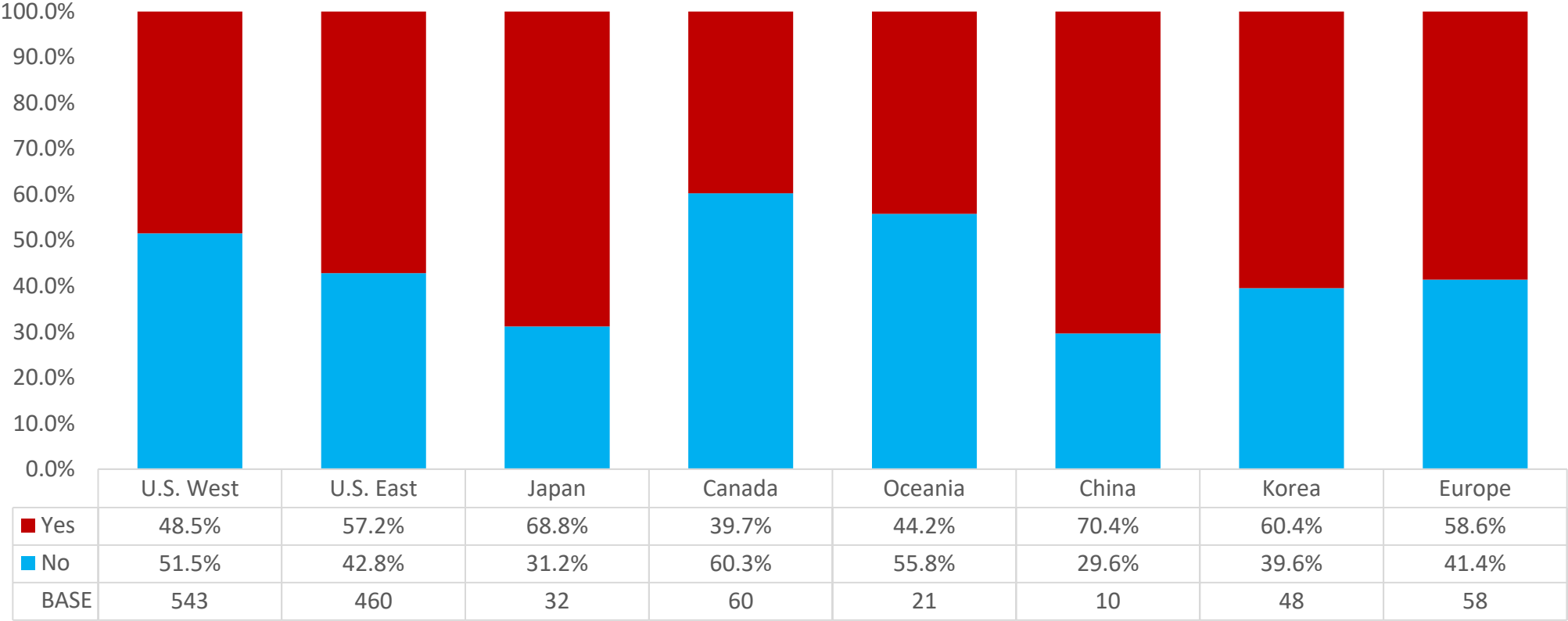
AREAS VISITED - ISLAND OF HAWAI'I CHINA



AREAS VISITED - ISLAND OF HAWAI'I EUROPE

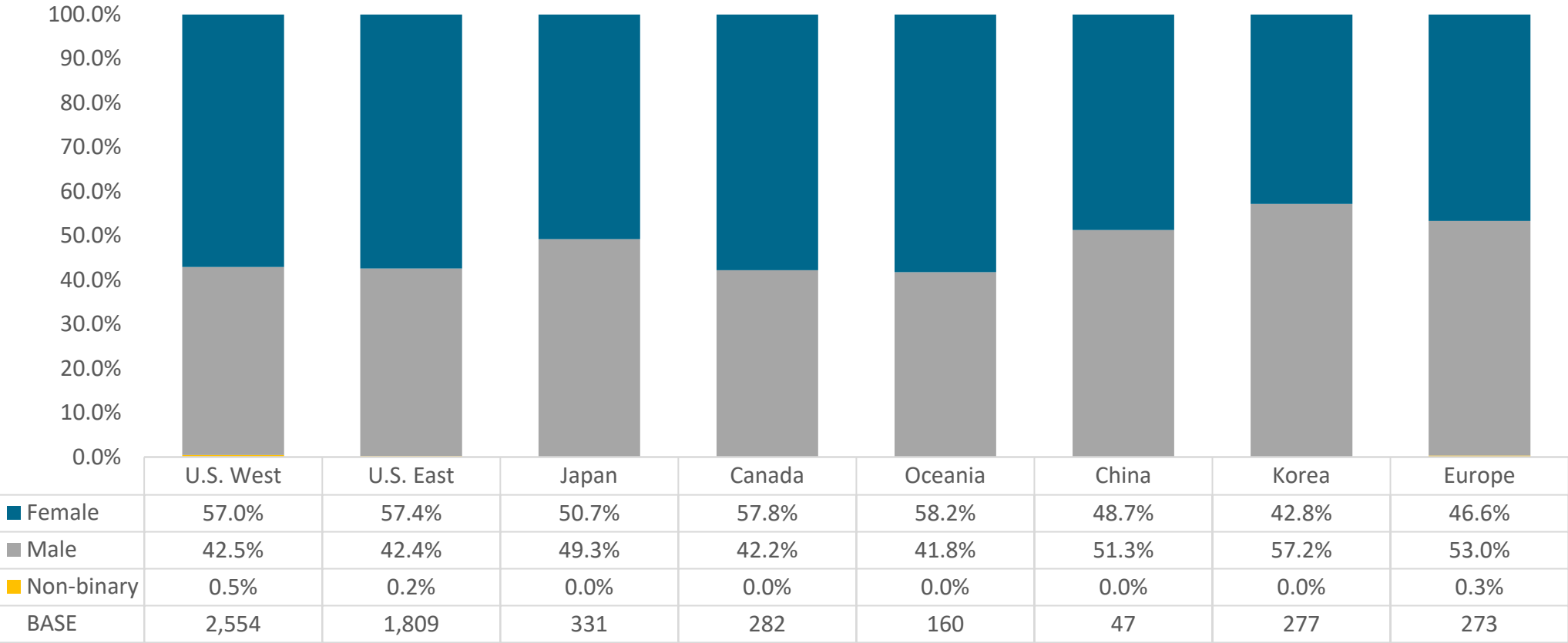


VOLCANIC ERUPTION MOTIVATOR - ISLAND OF HAWAI‘I

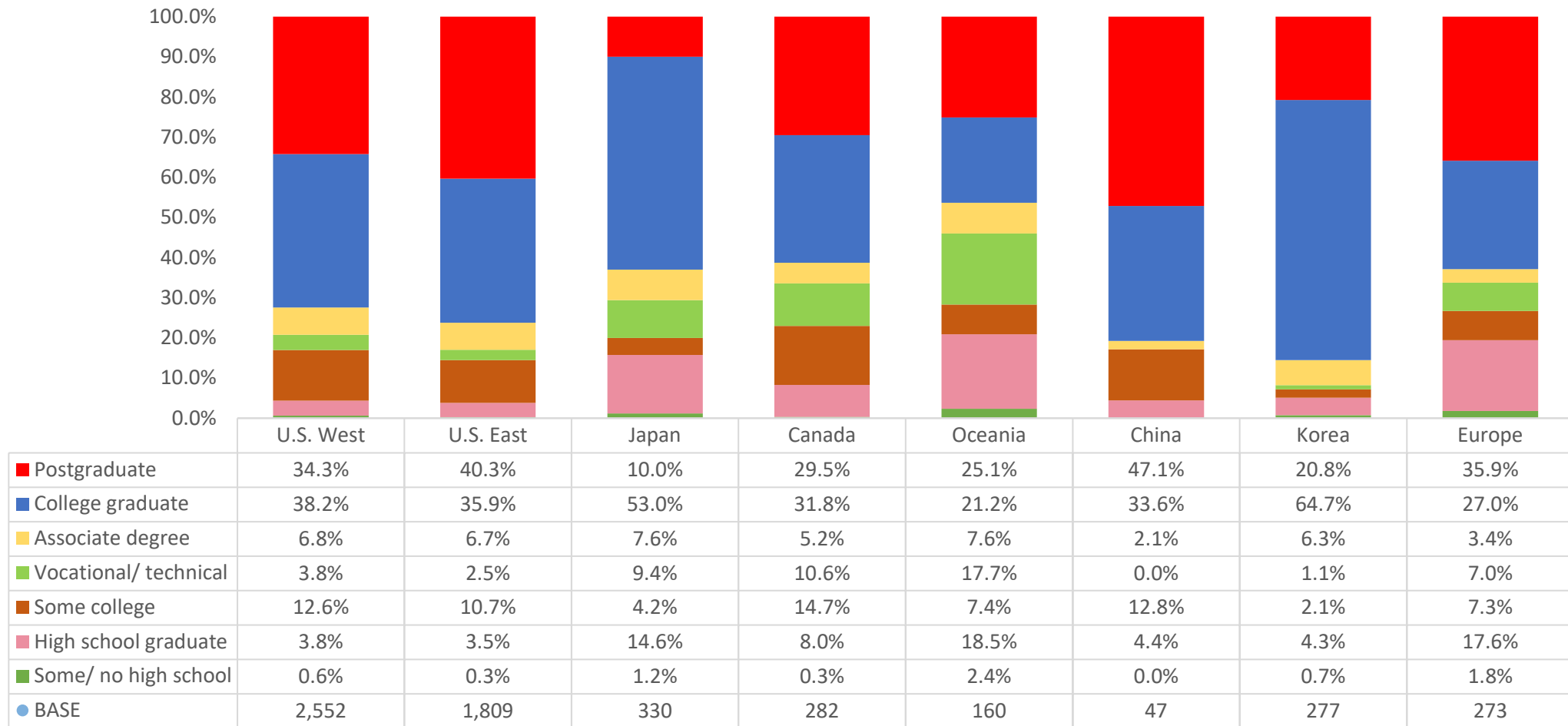


Section 11 – Visitor Profile

VISITOR PROFILE - GENDER



VISITOR PROFILE - EDUCATION



VISITOR PROFILE – HOUSEHOLD INCOME (US\$)

	U.S. West	U.S. East	Canada	Oceania	Europe
< \$40,000	4.3%	4.5%	7.0%	8.8%	12.8%
\$40,000 to \$59,999	4.2%	5.0%	3.5%	9.6%	15.4%
\$60,000 to \$79,999	6.9%	6.5%	10.8%	11.6%	9.8%
\$80,000 to \$99,999	8.0%	9.3%	14.4%	11.3%	13.7%
\$100,000 to \$124,999	12.3%	13.5%	13.3%	16.9%	15.3%
\$125,000 to \$149,999	10.7%	9.7%	10.2%	8.9%	9.3%
\$150,000 to \$174,999	8.1%	7.9%	5.9%	9.9%	5.6%
\$175,000 to \$199,999	7.8%	8.2%	7.7%	5.5%	2.9%
\$200,000 to \$249,999	11.4%	10.7%	8.7%	5.7%	6.7%
\$250,000 +	26.3%	24.7%	18.5%	11.9%	8.5%
BASE	2,519	1,791	278	156	268

VISITOR PROFILE - HOUSEHOLD INCOME (Yen)

	Japanese
< ¥3.5 million	10.5%
¥3.5 - ¥4.5 million	12.3%
¥4.5 - ¥5.5 million	10.2%
¥5.5 - ¥6.5 million	12.4%
¥6.5 - ¥7.5 million	11.2%
¥7.5 - ¥8.5 million	8.9%
¥8.5 - ¥10.0 million	7.4%
¥10.0 - ¥15.0 million	15.5%
¥15.0 - ¥20.0 million	5.3%
¥20.0 million +	6.5%
BASE	324

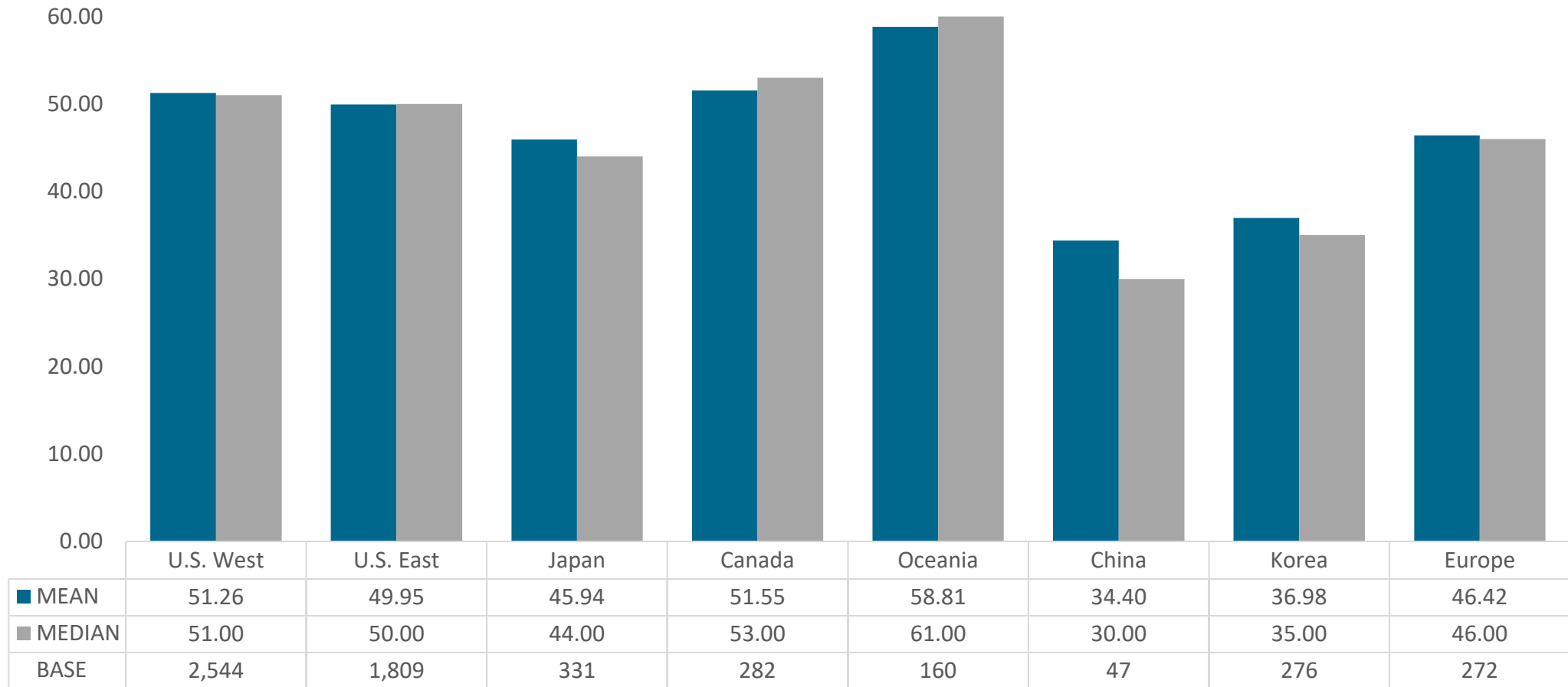
VISITOR PROFILE - HOUSEHOLD INCOME (Korean Won)

	Korean
< ₩16,305,000	8.0%
₩16,305,000 - ₩27,173,999	3.2%
₩27,174,000 - ₩38,041,999	7.8%
₩38,042,000 - ₩48,911,999	9.9%
₩48,912,000 - ₩59,781,999	11.4%
₩59,782,000 - ₩70,652,999	8.9%
₩70,653,000 - ₩81,520,999	9.2%
₩81,521,000 - ₩92,390,999	5.1%
₩92,391,000 - ₩103,259,999	9.1%
₩103,260,000 - ₩149,999,999	12.2%
₩150,000,000 - ₩199,999,999	7.0%
₩200,000,000+	7.9%
BASE	275

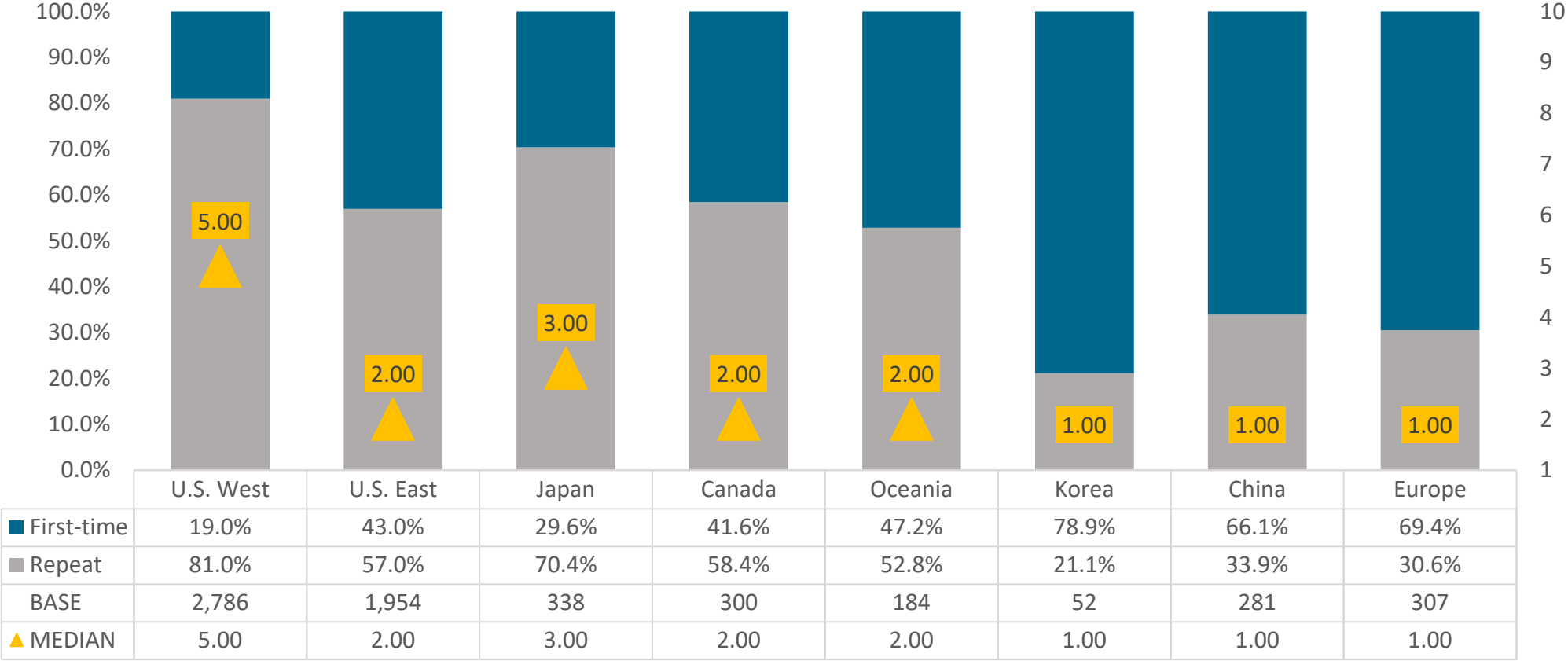
VISITOR PROFILE - HOUSEHOLD INCOME (Chinese Yuan)

	China
<¥250,799	23.4%
¥250,800 – ¥376,099	17.2%
¥376,100 – ¥501,399	6.2%
¥501,400 – ¥626,799	4.2%
¥626,800 – ¥783,499	10.4%
¥783,500 – ¥940,199	6.5%
¥940,200 – ¥1,096,899	4.2%
¥1,096,900 - ¥1,253,599	10.7%
¥1,253,600 – ¥1,560,799	2.1%
¥1,560,800+	15.1%
BASE	47

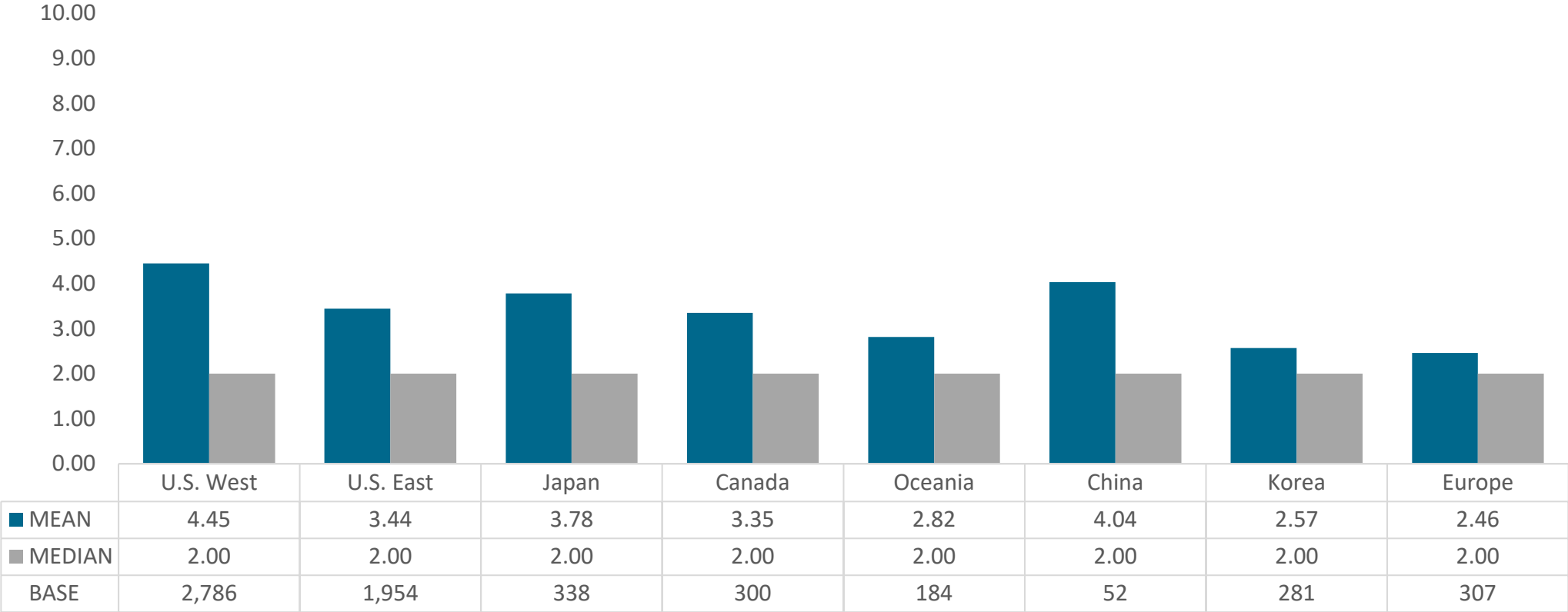
VISITOR PROFILE - AGE



VISITOR PROFILE - TRIPS TO HAWAI‘I



VISITOR PROFILE - TRAVEL PARTY SIZE



VISITOR PROFILE - TRAVEL PARTY

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
My spouse	60.6%	61.5%	63.2%	56.9%	66.1%	29.1%	62.4%	45.6%
Other adult members of my family	29.4%	28.9%	22.0%	31.1%	15.8%	21.4%	18.2%	16.6%
My child(ren)/ grandchild(ren) under 18	28.3%	25.8%	8.6%	16.8%	9.0%	5.9%	16.7%	10.8%
My friends/ associates	13.5%	12.4%	10.4%	18.4%	14.7%	30.5%	12.8%	14.3%
Myself only (traveled alone/ no one else)	10.1%	11.7%	12.2%	8.6%	9.6%	17.1%	6.8%	16.8%
My girlfriend/ boyfriend	6.1%	5.8%	1.8%	6.8%	4.5%	11.7%	2.1%	14.2%
Same gender partner	1.1%	1.1%	0.0%	1.1%	0.9%	0.0%	0.7%	0.9%
BASE	2786	1954	338	300	184	52	281	307

Section 12 – 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	1,153	2.89
U.S. East	1,112	2.94
Japan	318	5.50
Canada	163	7.68
Oceania	169	7.54
China	45	14.61
Korea	247	6.24
Europe	233	6.42
All MMAs	3,440	1.67

* 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	371	5.09
U.S. East	378	5.04
Japan	3	56.58
Canada	43	14.94
Oceania	12	28.29
China	4	49.00
Korea	6	40.01
Europe	80	10.96
All MMAs	897	3.27

* 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 $\pm$
U.S. West	915	3.24
U.S. East	596	4.01
Japan	11	29.55
Canada	109	9.39
Oceania	17	23.77
China	6	40.01
Korea	27	18.86
Europe	116	9.10
All MMAs	1,797	2.31

* 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	611	3.96
U.S. East	564	4.13
Japan	33	17.06
Canada	76	11.24
Oceania	30	17.89
China	12	28.29
Korea	49	14.00
Europe	111	9.30
All MMAs	1,486	2.54

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