



# VISITOR SATISFACTION STUDY QUARTER 3, 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 3, 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 $\pm$ | Online Response Rate |
|---------------------|-----------|-----------------------|----------------------|
| U.S. West           | 2,043     | 2.17                  | 5.80                 |
| U.S. East           | 1,567     | 2.48                  | 6.14                 |
| Japan               | 294       | 5.72                  | 2.40                 |
| Canada              | 381       | 5.02                  | 24.62                |
| Oceania             | 190       | 7.11                  | 7.40                 |
| China               | 33        | 17.06                 | 3.77                 |
| Korea               | 248       | 6.22                  | 3.69                 |
| Europe              | 402       | 4.89                  | 8.64                 |
| All visitor markets | 5,158     | 1.36                  | 6.30                 |

# Survey Methodology (cont.)

Monthly samples of visitors who stayed for at least two days were drawn from completed Domestic In-flight surveys 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 3, 2025. The VSAT weighting system was developed to adjust for disproportionate sampling across all visitor markets.

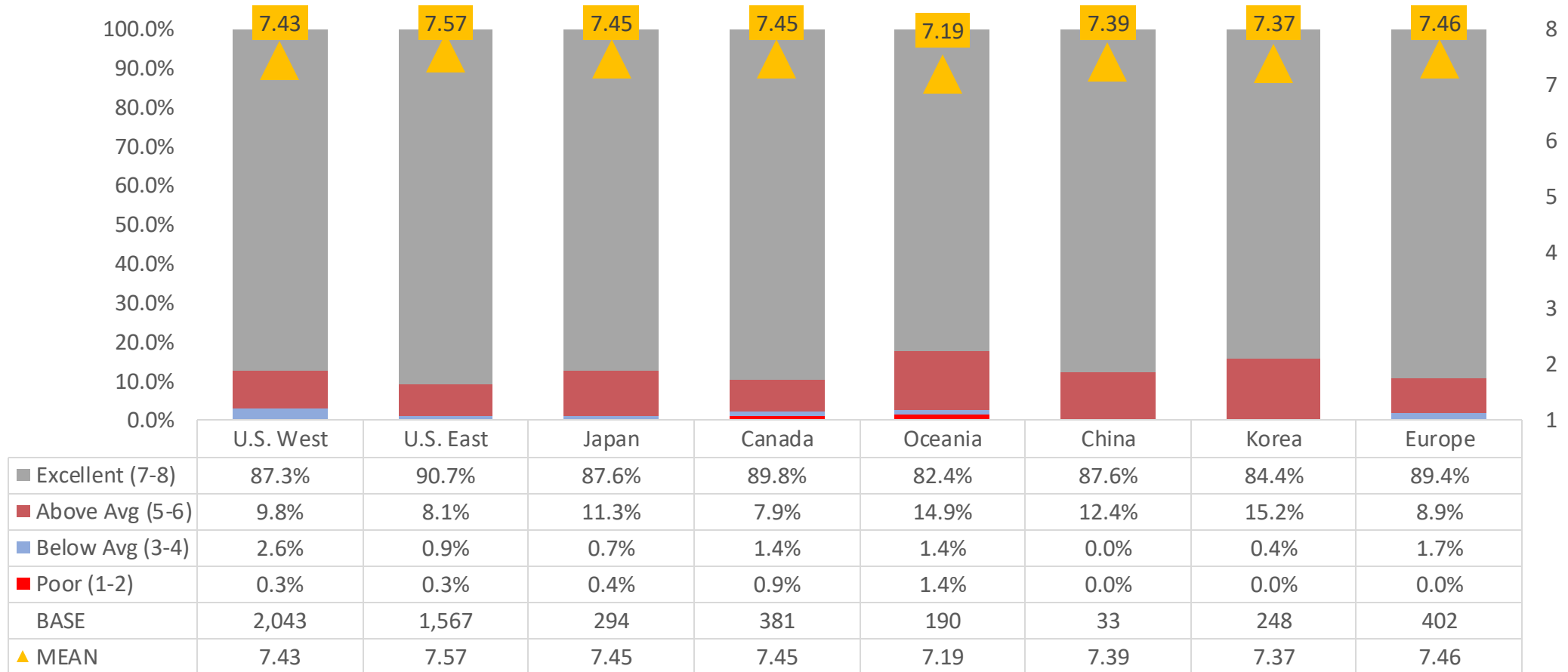
Data for 2025 is preliminary. Data for all other prior years reflect final visitor statistics from DBEDT Annual Visitor Satisfaction and Activity reports.

*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** and **U.S. East** gave higher satisfaction scores than male respondents from these visitor markets.
- **Trips to Hawai‘i:** Repeat visitors from **U.S. West** gave higher satisfaction scores for their trip compared to first-time visitors.
- **Education:** Visitors from **U.S. West** with a college degree were more satisfied with their stay compared to visitors from this market without a college degree.

# SATISFACTION – STATE OF HAWAI‘I BY VISITOR MARKET

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

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

|           | Q3 2016 | Q3 2017 | Q3 2018 | Q3 2019 | Q3 2020 | Q3 2021 | Q3 2022 | Q3 2023 | Q3 2024 | Q3 2025 P |
|-----------|---------|---------|---------|---------|---------|---------|---------|---------|---------|-----------|
| U.S. West | 87.5%   | 89.7%   | 88.8%   | 89.2%   | 54.5%   | 86.0%   | 88.7%   | 88.8%   | 88.9%   | 87.3%     |
| U.S. East | 90.0%   | 92.2%   | 90.0%   | 90.5%   | 57.9%   | 84.9%   | 89.4%   | 90.0%   | 90.2%   | 90.7%     |
| Japan     | 78.3%   | 80.6%   | 85.6%   | 89.2%   |         |         | 79.9%   | 83.3%   | 81.1%   | 87.6%     |
| Canada    | 88.4%   | 91.0%   | 87.3%   | 89.7%   |         |         | 87.8%   | 88.3%   | 89.0%   | 89.8%     |
| Oceania   | 81.5%   | 82.9%   | 80.8%   | 81.5%   |         |         | 80.5%   | 76.3%   | 77.1%   | 82.4%     |
| Korea     | 72.9%   | 72.9%   | 73.3%   | 76.1%   |         |         | 84.7%   | 88.5%   | 87.5%   | 84.4%     |
| China     | 75.8%   | 83.6%   | 65.0%   | 63.2%   |         |         | 79.9%   | 85.3%   | 87.6%   | 87.6%     |
| Europe    | 90.9%   | 88.2%   | 85.6%   | 89.2%   |         |         |         |         | 91.1%   | 89.4%     |

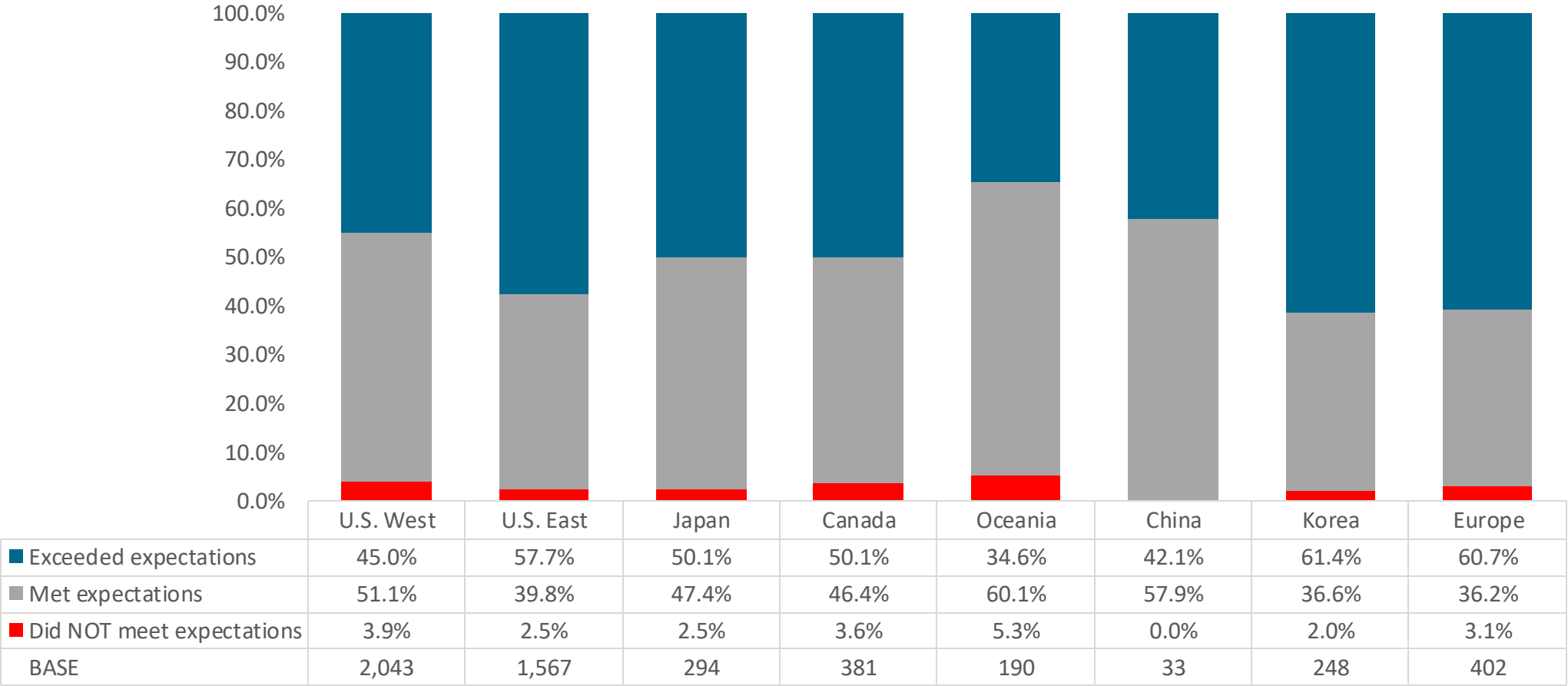
P= Preliminary Data

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. 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.



# SATISFACTION - HAWAI'I TRIP EXPECTATIONS

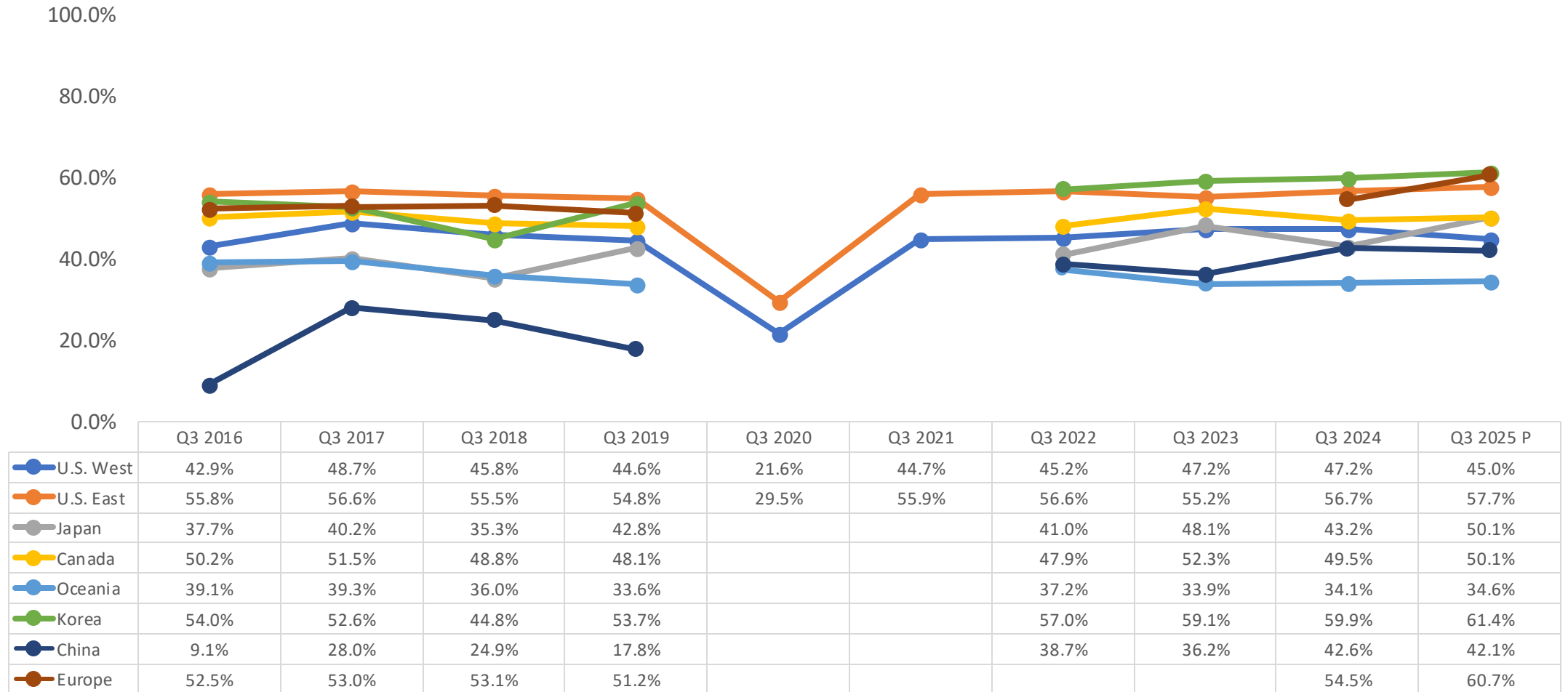


# SATISFACTION – HAWAI‘I TRIP EXPECTATIONS

- ***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, Canada and Japan.**
- ***Age:*** Younger respondents from **U.S. West** (18 – 49 years old), **U.S. East** (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.
- ***Gender:*** Female visitors from **U.S. West** gave higher mean satisfaction scores compared to male visitors from this market.
- ***Travel party:*** Visitors from **Japan** traveling alone were the least 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.
- ***Education:*** Those visitors with a college degree from **U.S. West** and **Japan** were more likely to feel their trip exceeded their expectations compared to those without a college degree.

# SATISFACTION - HAWAI'I TRIP EXPECTATIONS

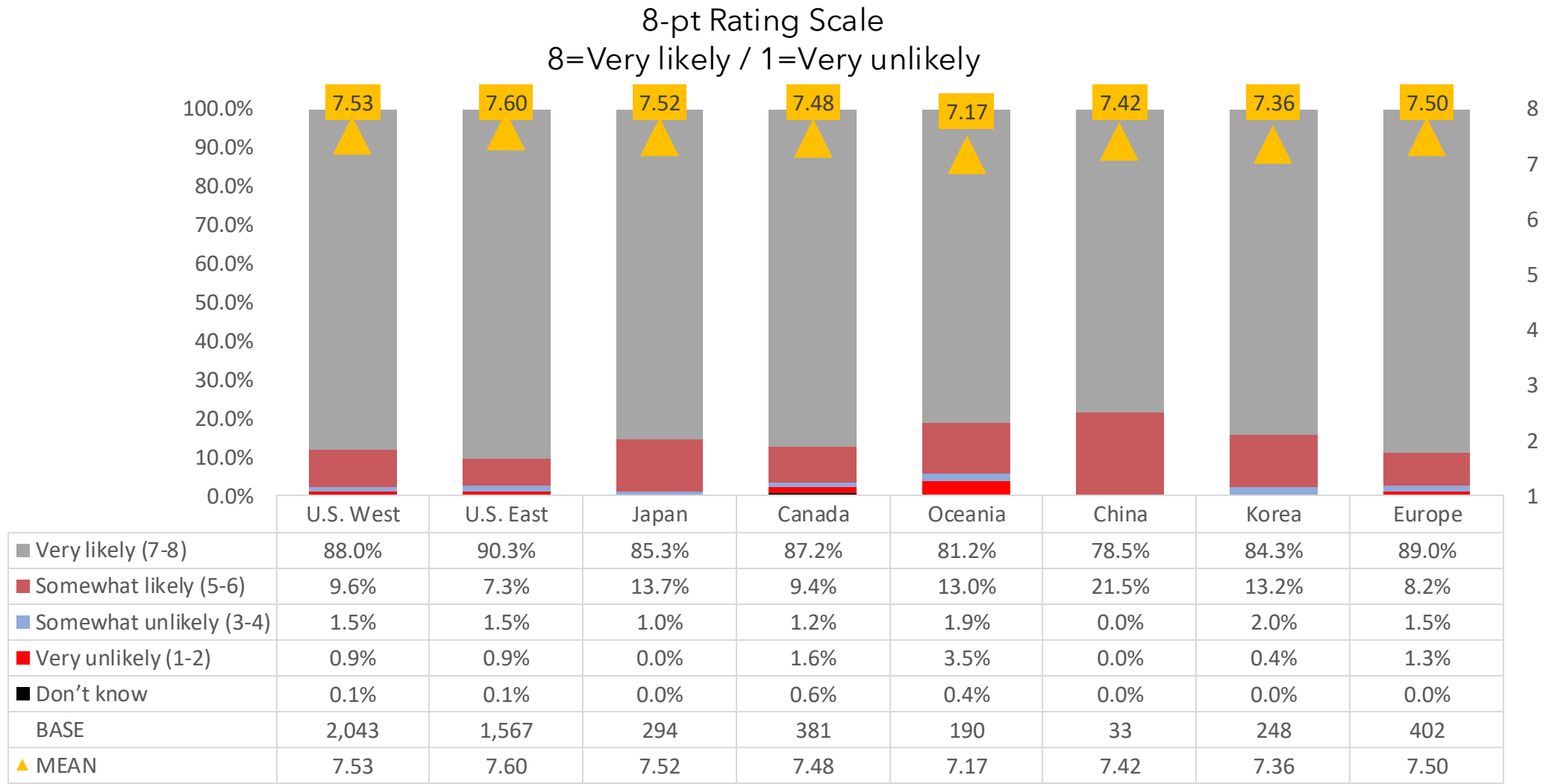
Tracking Data – Rating of “Exceeded expectations”



P= Preliminary Data

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

# BRAND/ DESTINATION - ADVOCACY



# BRAND/ DESTINATION – ADVOCACY

- **Gender:** Female visitors from **U.S. West**, **U.S. East** 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** compared to first-time visitors from this market.
- **Education:** Visitors from **U.S. West** with a college degree were more likely to recommend the state compared to those without a college degree.

# BRAND/ DESTINATION – ADVOCACY

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

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

|           | Q3 2016 | Q3 2017 | Q3 2018 | Q3 2019 | Q3 2020 | Q3 2021 | Q3 2022 | Q3 2023 | Q3 2024 | Q3 2025 P |
|-----------|---------|---------|---------|---------|---------|---------|---------|---------|---------|-----------|
| U.S. West | 88.2%   | 89.4%   | 90.6%   | 90.9%   | 67.5%   | 87.1%   | 89.3%   | 90.4%   | 90.5%   | 88.0%     |
| U.S. East | 88.1%   | 89.9%   | 90.2%   | 90.6%   | 68.9%   | 88.6%   | 89.3%   | 89.2%   | 89.3%   | 90.3%     |
| Japan     | 80.7%   | 76.8%   | 79.2%   | 78.5%   |         |         | 77.6%   | 78.7%   | 79.8%   | 85.3%     |
| Canada    | 88.9%   | 90.4%   | 89.6%   | 90.8%   |         |         | 89.9%   | 88.6%   | 89.5%   | 87.2%     |
| Oceania   | 80.6%   | 82.1%   | 81.0%   | 79.1%   |         |         | 77.6%   | 74.5%   | 75.1%   | 81.2%     |
| Korea     | 83.2%   | 73.2%   | 67.1%   | 67.7%   |         |         | 75.2%   | 81.6%   | 78.4%   | 84.3%     |
| China     | 71.5%   | 86.0%   | 67.7%   | 62.0%   |         |         | 79.9%   | 79.7%   | 78.3%   | 78.5%     |
| Europe    | 87.3%   | 84.6%   | 85.6%   | 88.3%   |         |         |         |         | 88.6%   | 89.0%     |

P= Preliminary Data

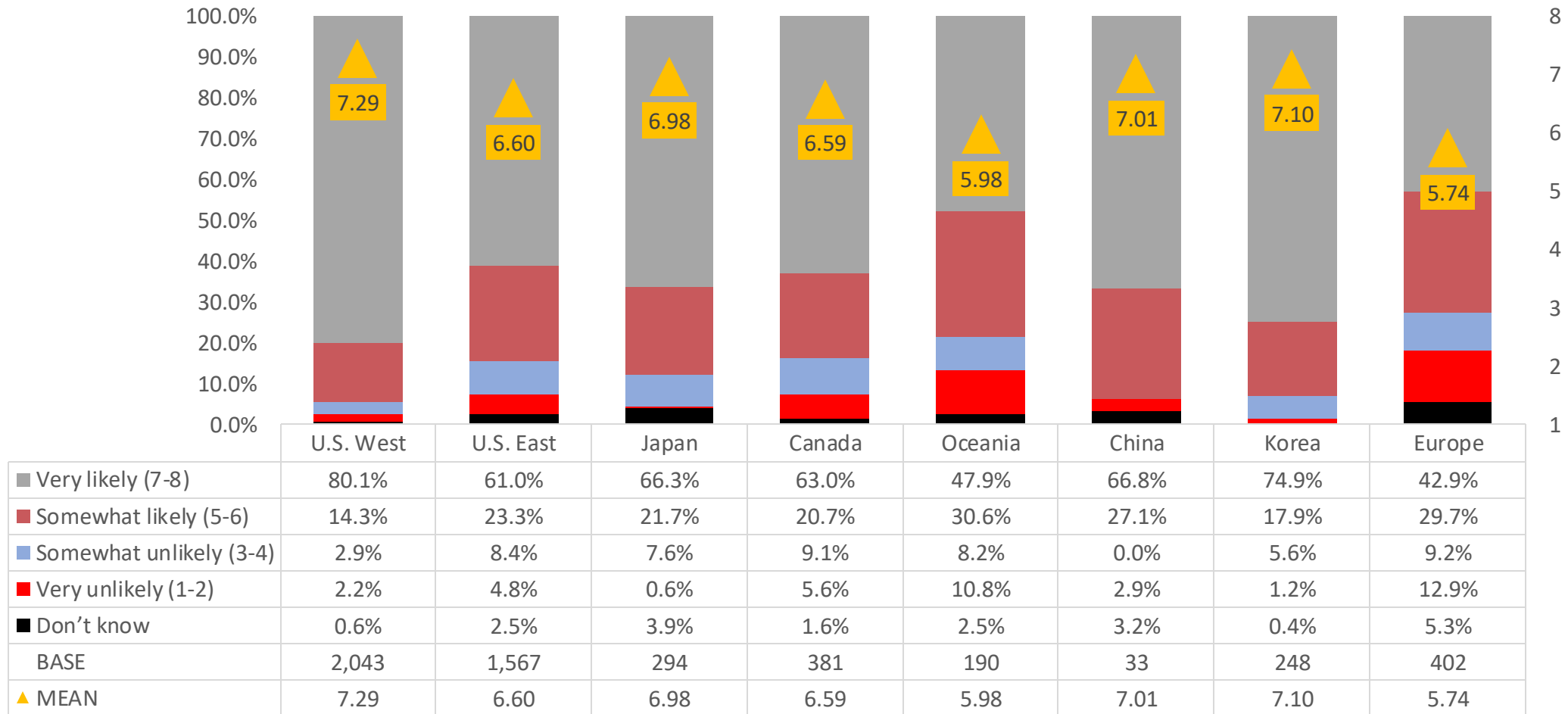
Q. How likely are you to recommend the state of Hawai'i as a vacation place to your friends and relatives?

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. 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

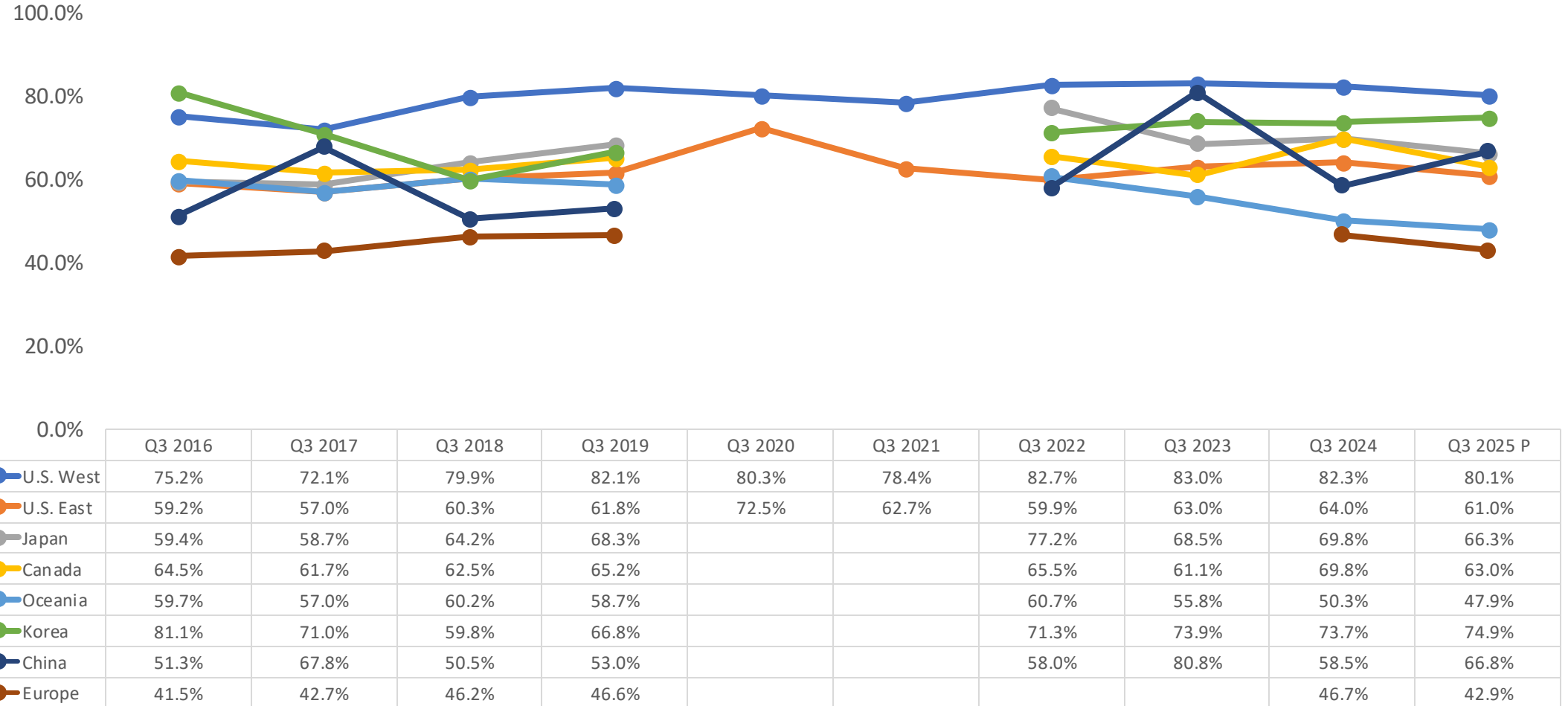


# LIKELIHOOD OF RETURN VISIT

- ***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, Europe and Japan.**
- ***Age:*** Older visitors (50+) from **Japan** are more likely to anticipate a return to the state in the next five years compared to younger visitors from this market.
- ***Islands visited:*** Visitors from **U.S. East, Oceania** and **Canada** whose trip consisted of visiting a single island expressed a higher likelihood of returning to the state than those who visited multiple islands during their stay.
- ***Travel party size:*** Those visitors from **U.S. West** and **U.S. East** 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** and **U.S. East** 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 these markets.

# 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%+

| Q3 2024   | Q3 2025 P  |
|---|--|
| 60.3% Too expensive<br>39.7% Want to go someplace new<br>32.8% Too crowded/ congested/ traffic<br>29.3% Poor value<br>19.0% No compelling reason to return<br>17.2% Too commercial/ overdeveloped<br>13.8% Unfriendly people/ felt unwelcome<br>12.1% Five years is too soon<br>10.3% Other financial obligations | 46.0% High cost of travel<br>15.2% Negative local interaction<br>12.5% Preference for other destinations |

P= Preliminary Data

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

Top Responses 10%+

| Q3 2024  | Q3 2025 P  |
|--|--|
| 55.3% Too expensive<br>40.8% Flight too long<br>39.2% Want to go someplace new<br>17.9% Poor value<br>17.0% Five years is too soon<br>13.5% Other financial obligations<br>12.8% Too crowded/ congested/ traffic | 49.3% High cost of travel<br>26.7% Long travel distance<br>18.4% Preference for other destinations<br>12.5% Health and personal limitations/ age |

P= Preliminary Data

# UNLIKELY TO RETURN – TOP REASONS JAPAN

Top Responses 10%+

| Q3 2024*  | Q3 2025** P   |
|---|---|
| 66.2% Too expensive<br>31.7% Want to go someplace new<br>29.2% Five years is too soon<br>18.2% Other financial obligations<br>15.0% Too commercialized/ overdeveloped<br>11.4% Poor value | 38.7% High cost of travel<br>26.3% Other<br>15.5% Financial constraints |

\*Caution small base (n=44 respondents) in Q3 2024.

\*\*Caution small base (n=39 respondents) in Q3 2025.

P= Preliminary Data

# UNLIKELY TO RETURN - TOP REASONS CANADA

Top Responses 10%+

| Q3 2024   | Q3 2025 P  |
|---|--|
| 64.5% Too expensive<br>34.3% Want to go someplace new<br>26.5% Flight too long<br>23.9% Five years is too soon<br>16.4% Poor value<br>13.9% Other financial obligations | 57.2% High cost of travel<br>19.1% Long travel distance<br>16.7% Preference for other destinations |

P= Preliminary Data

# UNLIKELY TO RETURN - TOP REASONS OCEANIA

Top Responses 10%+

| Q3 2024   | Q3 2025* P   |
|---|--|
| 55.9% Too expensive<br>33.8% Poor value<br>30.3% Want to go someplace new<br>26.6% Too commercialized/ overdeveloped<br>24.2% Too crowded/ congested/ traffic<br>18.0% No compelling reason to return<br>12.7% Five years is too soon | 41.3% Preference for other destinations<br>41.3% High cost of travel<br>11.1% Too commercialized/ touristy |

\*Caution small base (n=39 respondents) in Q3 2025.

P= Preliminary Data

# UNLIKELY TO RETURN - TOP REASONS KOREA

Top Responses 10%+

| Q3 2024*   | Q3 2025** P               |
|--|---------------------------|
| 73.6% Too expensive<br>61.8% Poor value<br>17.7% Flight too long<br>13.2% Want to go someplace new<br>11.8% Other financial obligations<br>11.8% Unfriendly people/ felt unwelcome<br>11.8% Poor service | 94.6% High cost of travel |

\*Caution small base (n=16 respondents) in Q3 2024.

\*\*Caution small base (n=18 respondents) in Q3 2025.

P= Preliminary Data

# UNLIKELY TO RETURN – TOP REASONS CHINA

Top Responses 10%+

| Q3 2024*   | Q3 2025** P                               |
|--|---|
| 40.0% Want to go someplace new<br>40.0% Poor value<br>20.0% Flight too long<br>20.0% Five years is too soon<br>20.0% Too crowded/ congested/ traffic<br>20.0% No compelling reason to return<br>20.0% Poor health/ age<br>20.0% Unfriendly people/ felt unwelcome<br>20.0% Buildings/ infrastructure | 52.4% Other<br>47.6% Long travel distance |

\*Caution small base (n=5 respondents) in Q3 2024.

\*\*Caution small base (n=2 respondents) in Q3 2025.

P= Preliminary Data

# UNLIKELY TO RETURN - TOP REASONS EUROPE

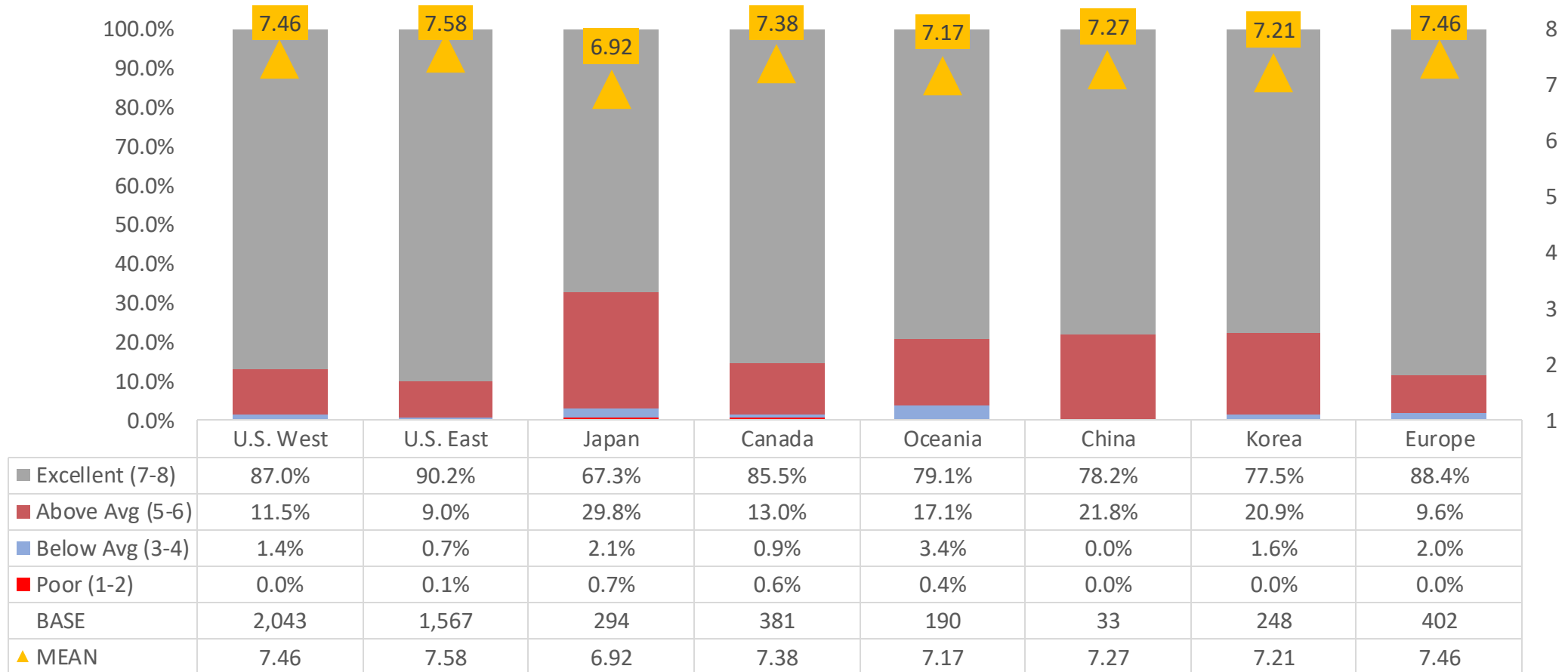
Top Responses 10%+

| Q3 2024   | Q3 2025 P  |
|---|--|
| 62.0% Flight too long<br>56.0% Too expensive<br>39.6% Want to go someplace new<br>26.1% Five years is too soon<br>12.4% Too commercialized/ overdeveloped<br>11.9% Poor value<br>11.0% Too crowded/ congested/ traffic<br>10.5% Other financial obligations | 60.8% Long travel distance<br>49.2% High cost of travel<br>18.9% Preference for other destinations |

P= Preliminary Data

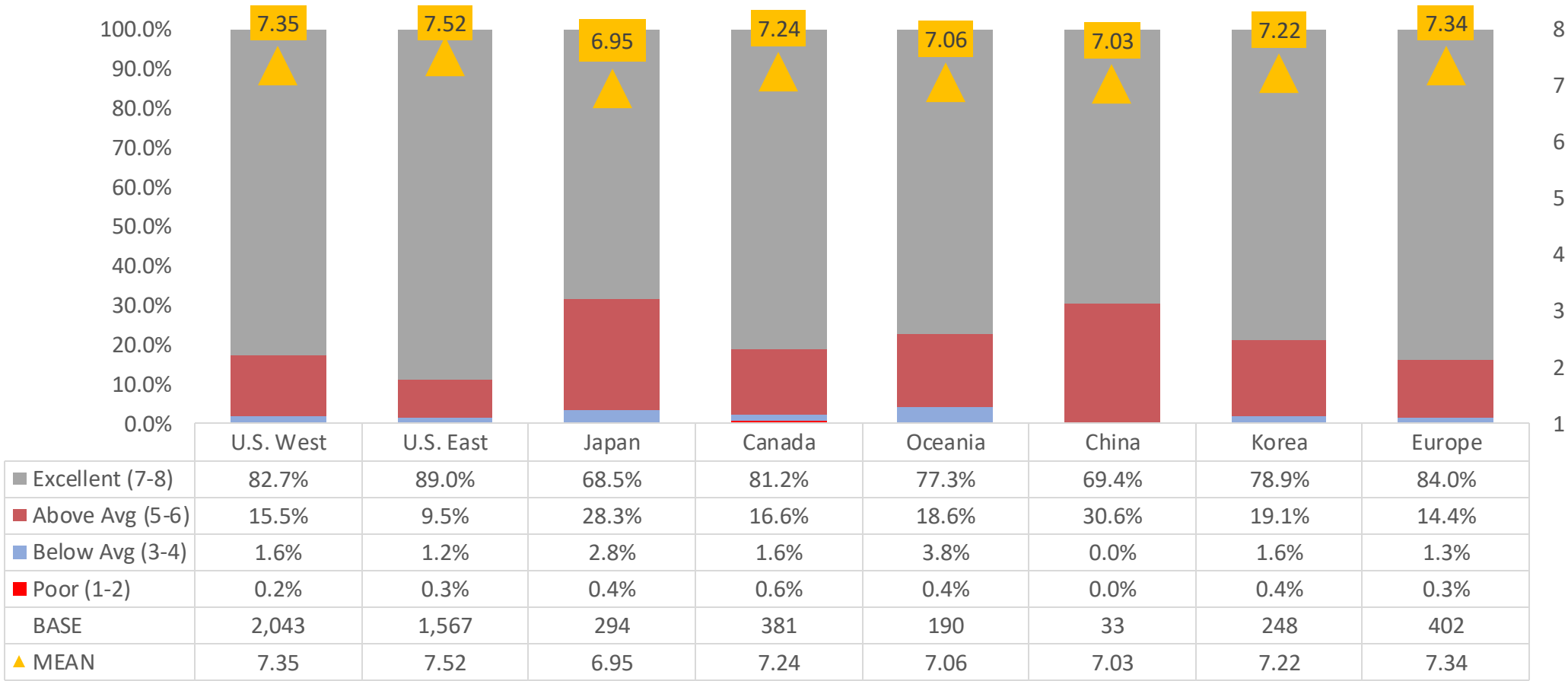
# OFFERING A VARIETY OF EXPERIENCES

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



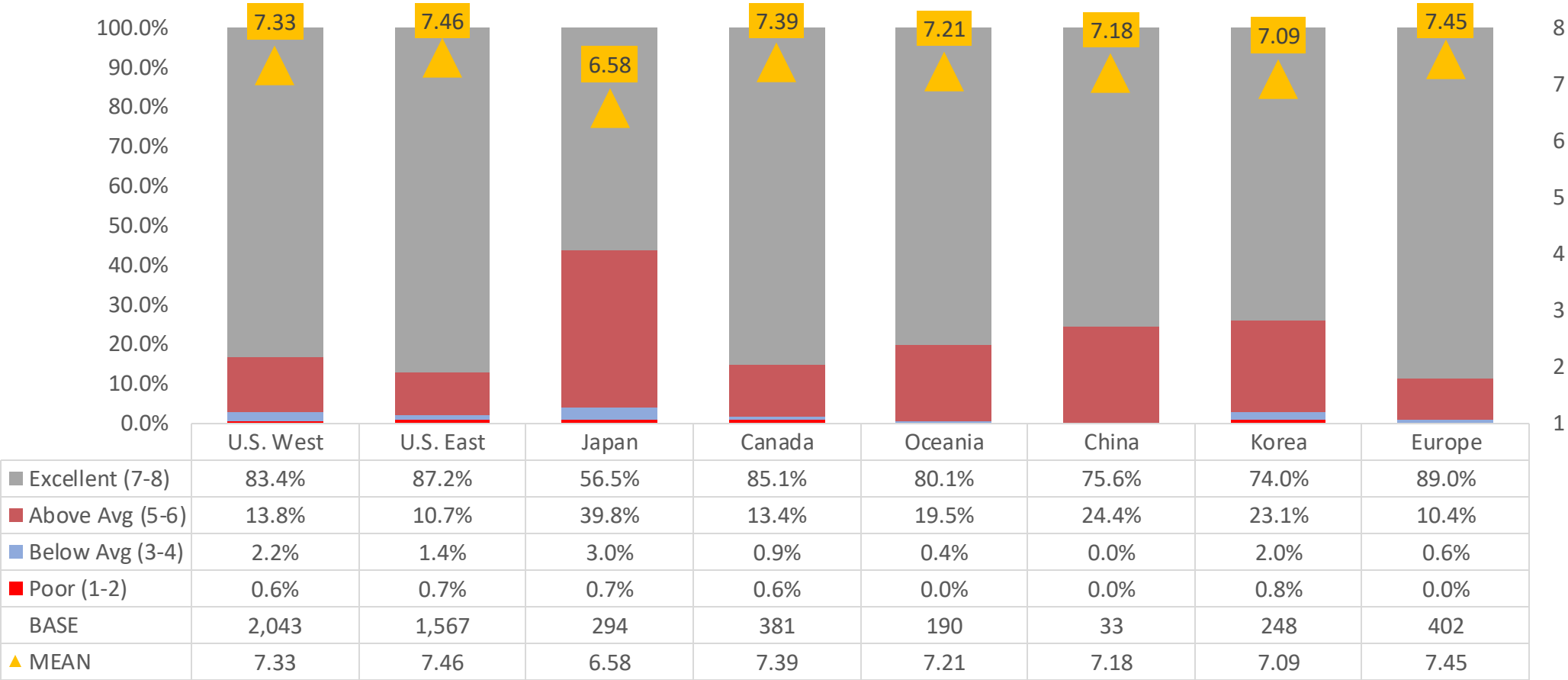
# NUMBER OF DIFFERENT/ UNIQUE EXPERIENCES

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



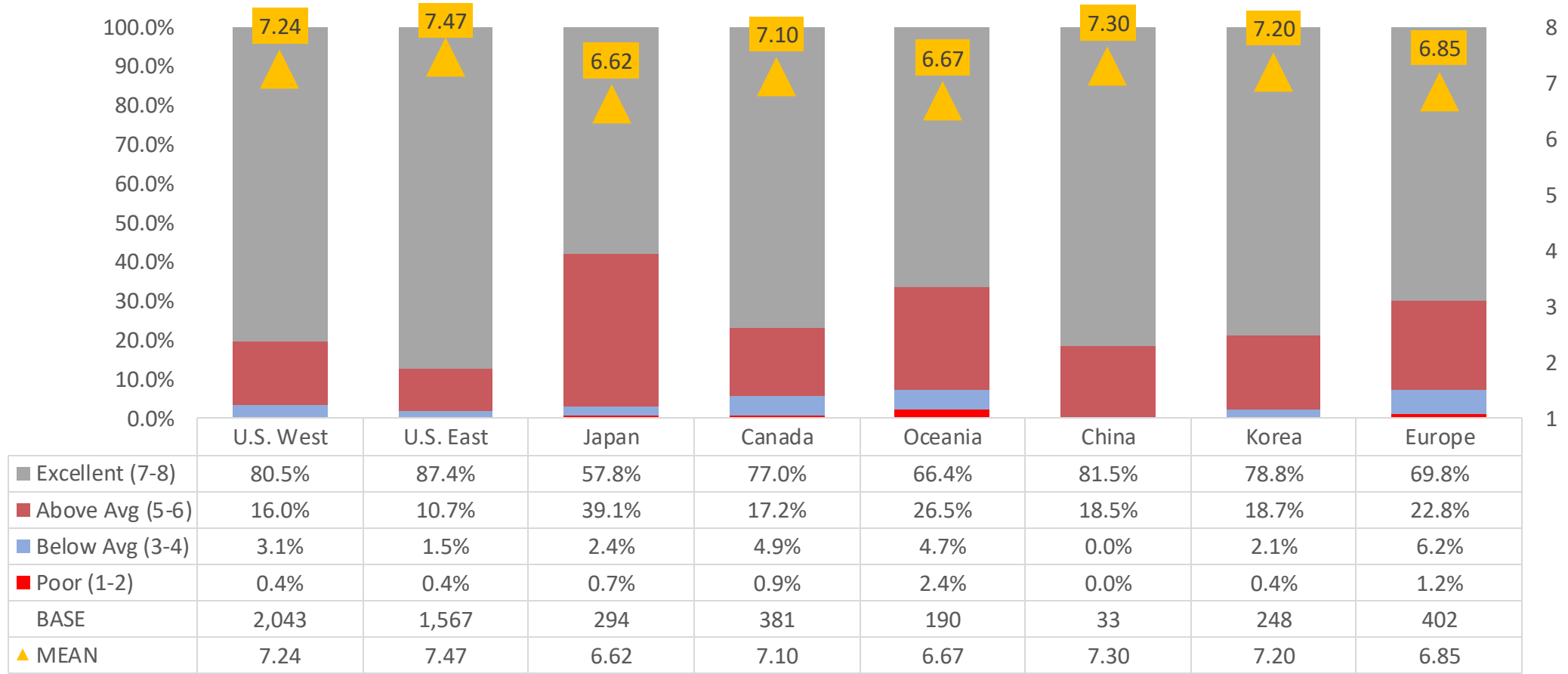
# SAFE AND SECURE DESTINATION

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



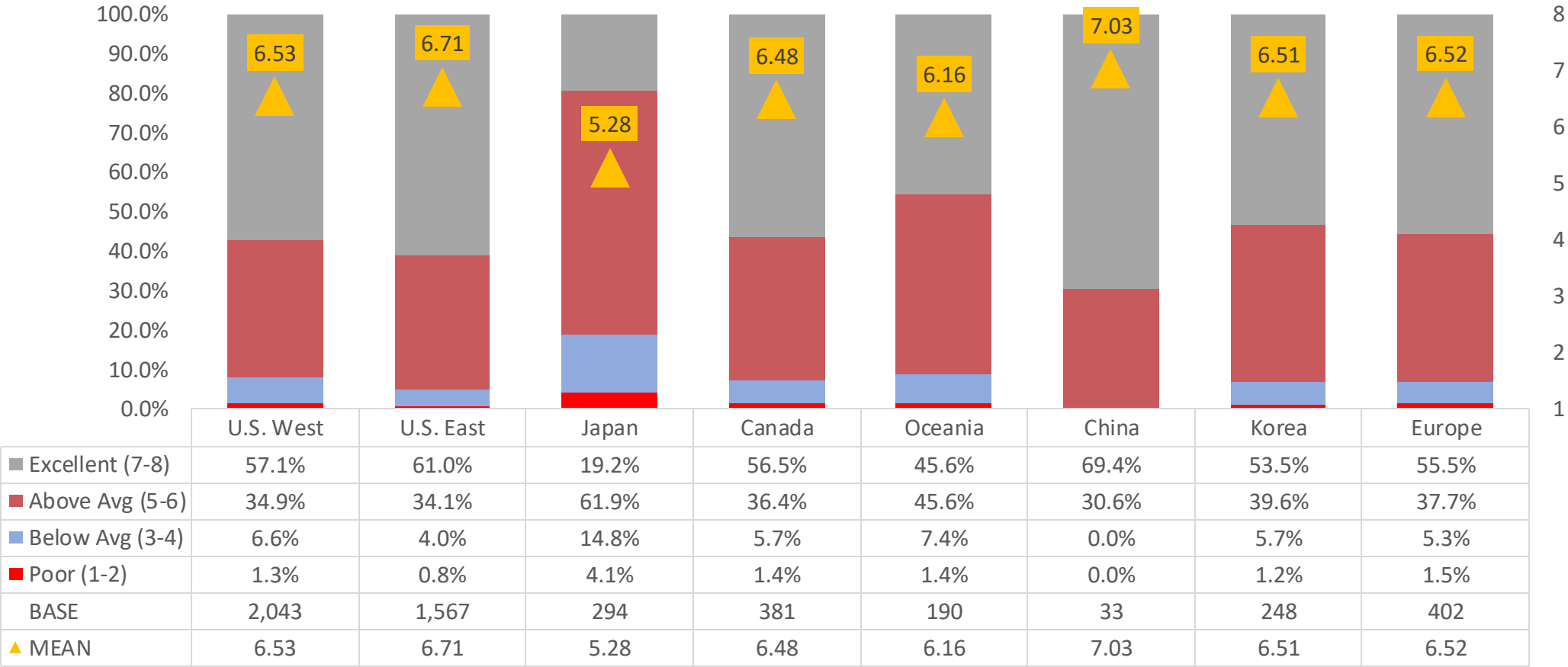
# ENVIRONMENTALLY FRIENDLY/ SUSTAINABLE

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 |
|--|-----------|-----------|-------|--------|---------|-------|-------|--------|
| <b>TOTAL</b>                                       | 98.0%     | 98.6%     | 97.8% | 97.5%  | 93.9%   | 96.8% | 99.6% | 99.0%  |
| <b>On own (self-guided)/ driving around island</b> | 86.0%     | 84.2%     | 79.9% | 84.7%  | 48.4%   | 75.9% | 84.5% | 81.5%  |
| <b>Helicopter ride/ airplane tour</b>              | 2.4%      | 4.9%      | 0.0%  | 3.1%   | 1.1%    | 3.2%  | 4.4%  | 15.2%  |
| <b>Boat tour/ submarine ride/ whale watching</b>   | 25.4%     | 33.9%     | 8.3%  | 24.7%  | 16.6%   | 32.9% | 31.7% | 29.4%  |
| <b>Visit towns/ communities</b>                    | 59.6%     | 60.1%     | 33.4% | 54.1%  | 32.1%   | 39.4% | 42.5% | 59.1%  |
| <b>Private limousine/ van tour/ tour bus</b>       | 7.5%      | 15.9%     | 15.9% | 11.8%  | 32.0%   | 15.0% | 8.9%  | 12.6%  |
| <b>Scenic views/ natural landmarks</b>             | 66.7%     | 76.4%     | 23.0% | 72.3%  | 62.4%   | 72.4% | 59.5% | 76.4%  |
| <b>Movie/ TV/ film location tours</b>              | 6.4%      | 9.6%      | 5.5%  | 9.2%   | 9.1%    | 17.6% | 23.2% | 13.9%  |

# ACTIVITIES – RECREATION

|   | U.S. West | U.S. East | Japan | Canada | Oceania | China  | Korea | Europe |
|---|-----------|-----------|-------|--------|---------|--------|-------|--------|
| <b>TOTAL</b>                              | 96.6%     | 96.7%     | 96.6% | 99.0%  | 92.4%   | 100.0% | 98.4% | 99.3%  |
| <b>Beach/ sunbathing</b>                  | 85.7%     | 85.6%     | 77.3% | 90.8%  | 78.3%   | 94.1%  | 82.3% | 92.4%  |
| <b>Bodyboarding</b>                       | 12.9%     | 9.8%      | 1.1%  | 14.8%  | 5.7%    | 8.8%   | 5.8%  | 14.0%  |
| <b>Stand-up paddle boarding</b>           | 5.2%      | 3.8%      | 2.4%  | 4.7%   | 4.0%    | 2.9%   | 5.3%  | 5.5%   |
| <b>Surfing</b>                            | 6.9%      | 7.7%      | 5.0%  | 11.6%  | 5.1%    | 9.1%   | 9.2%  | 16.1%  |
| <b>Canoe paddling</b>                     | 2.5%      | 1.7%      | 2.0%  | 1.9%   | 0.7%    | 2.9%   | 3.7%  | 1.0%   |
| <b>Kayaking</b>                           | 4.7%      | 4.3%      | 2.8%  | 5.0%   | 1.1%    | 5.9%   | 2.4%  | 3.9%   |
| <b>Swimming in the ocean</b>              | 71.8%     | 71.6%     | 40.2% | 76.0%  | 65.1%   | 47.9%  | 55.9% | 82.7%  |
| <b>Snorkeling</b>                         | 47.7%     | 46.3%     | 19.1% | 47.4%  | 25.6%   | 48.5%  | 50.1% | 54.2%  |
| <b>Freediving</b>                         | 2.4%      | 2.7%      | 0.3%  | 2.9%   | 1.4%    | 9.1%   | 1.6%  | 2.4%   |
| <b>Windsurfing/ kitesurfing</b>           | 0.7%      | 0.4%      | 0.0%  | 1.2%   | 0.7%    | 0.0%   | 0.0%  | 0.4%   |
| <b>Jet skiing/ parasailing</b>            | 2.1%      | 2.4%      | 3.2%  | 2.2%   | 1.1%    | 0.0%   | 1.6%  | 0.3%   |
| <b>Scuba diving</b>                       | 2.6%      | 2.6%      | 2.0%  | 4.6%   | 0.0%    | 2.9%   | 0.4%  | 2.7%   |
| <b>Fishing</b>                            | 3.1%      | 3.6%      | 0.4%  | 2.9%   | 0.7%    | 2.9%   | 0.4%  | 0.4%   |
| <b>Golf</b>                               | 6.3%      | 6.3%      | 6.4%  | 8.6%   | 2.6%    | 6.2%   | 5.8%  | 1.9%   |
| <b>Running/ jogging/ fitness/ walking</b> | 29.4%     | 30.0%     | 13.7% | 32.0%  | 30.2%   | 15.0%  | 19.7% | 25.0%  |

# ACTIVITIES – RECREATION (continued)

|  | U.S. West | U.S. East | Japan | Canada | Oceania | China  | Korea | Europe |
|--|-----------|-----------|-------|--------|---------|--------|-------|--------|
| <b>TOTAL</b>                                 | 96.6%     | 96.7%     | 96.6% | 99.0%  | 92.4%   | 100.0% | 98.4% | 99.3%  |
| <b>Cycling</b>                               | 2.3%      | 2.1%      | 3.6%  | 3.3%   | 2.1%    | 2.9%   | 0.8%  | 3.4%   |
| <b>Spa</b>                                   | 9.6%      | 10.5%     | 3.5%  | 5.6%   | 4.6%    | 8.8%   | 2.5%  | 7.4%   |
| <b>Hiking</b>                                | 38.2%     | 48.2%     | 20.4% | 46.7%  | 17.4%   | 54.7%  | 27.3% | 48.7%  |
| <b>Backpacking/ camping</b>                  | 0.9%      | 1.4%      | 0.4%  | 1.3%   | 0.0%    | 8.8%   | 1.7%  | 1.7%   |
| <b>Agritourism</b>                           | 20.9%     | 24.9%     | 12.5% | 18.1%  | 11.9%   | 17.6%  | 21.9% | 15.0%  |
| <b>Sports event or tournament</b>            | 1.7%      | 2.1%      | 0.4%  | 4.3%   | 1.4%    | 0.0%   | 0.8%  | 3.2%   |
| <b>Parks/ botanical gardens</b>              | 34.8%     | 43.3%     | 20.0% | 37.7%  | 22.5%   | 30.0%  | 23.2% | 39.8%  |
| <b>Waterparks</b>                            | 2.3%      | 1.7%      | 3.5%  | 1.7%   | 0.7%    | 2.9%   | 4.0%  | 1.0%   |
| <b>Mountain tubing/ waterfall<br/>rappel</b> | 2.7%      | 3.9%      | 0.7%  | 1.7%   | 0.7%    | 5.9%   | 3.7%  | 4.9%   |
| <b>Ziplining</b>                             | 5.1%      | 3.4%      | 0.4%  | 3.7%   | 1.1%    | 0.0%   | 0.4%  | 2.4%   |
| <b>Skydiving</b>                             | 0.3%      | 0.9%      | 0.9%  | 0.0%   | 0.4%    | 0.0%   | 0.8%  | 0.3%   |
| <b>All-terrain vehicle (ATV)</b>             | 2.8%      | 4.6%      | 3.1%  | 6.1%   | 1.1%    | 2.9%   | 7.6%  | 3.3%   |
| <b>Horseback riding</b>                      | 1.7%      | 1.7%      | 3.0%  | 1.2%   | 0.0%    | 5.9%   | 0.4%  | 1.2%   |
| <b>Tennis/ pickleball</b>                    | 3.0%      | 2.0%      | 0.7%  | 2.5%   | 0.0%    | 0.0%   | 2.8%  | 3.8%   |

# ACTIVITIES – ENTERTAINMENT & DINING

|  | U.S. West | U.S. East | Japan | Canada | Oceania | China  | Korea | Europe |
|--|-----------|-----------|-------|--------|---------|--------|-------|--------|
| <b>TOTAL</b>                                 | 99.4%     | 98.7%     | 98.2% | 99.2%  | 98.9%   | 100.0% | 99.1% | 98.5%  |
| <b>Lunch/ sunset/ dinner/ evening cruise</b> | 19.6%     | 23.6%     | 13.9% | 26.7%  | 14.1%   | 60.0%  | 32.0% | 25.5%  |
| <b>Live music/ stage show</b>                | 32.1%     | 42.1%     | 18.0% | 33.1%  | 20.1%   | 32.9%  | 12.2% | 32.0%  |
| <b>Nightclub/ dancing/ bar/ karaoke</b>      | 7.4%      | 7.7%      | 2.0%  | 5.3%   | 5.5%    | 9.1%   | 3.9%  | 5.4%   |
| <b>Fine dining</b>                           | 51.1%     | 51.7%     | 36.0% | 40.7%  | 29.4%   | 33.2%  | 43.4% | 32.9%  |
| <b>Family restaurant</b>                     | 76.8%     | 71.6%     | 31.8% | 69.6%  | 70.6%   | 30.6%  | 60.2% | 59.2%  |
| <b>Fast food</b>                             | 41.1%     | 40.0%     | 54.9% | 56.1%  | 53.4%   | 51.2%  | 61.3% | 57.2%  |
| <b>Food truck</b>                            | 46.2%     | 48.3%     | 20.2% | 49.8%  | 29.1%   | 30.9%  | 57.6% | 53.0%  |
| <b>Café/ coffee house</b>                    | 54.3%     | 54.0%     | 51.0% | 54.0%  | 58.6%   | 36.8%  | 67.0% | 56.4%  |
| <b>Ethnic dining</b>                         | 24.1%     | 30.7%     | 5.0%  | 19.7%  | 10.9%   | 23.8%  | 17.3% | 9.4%   |
| <b>Farm-to-table cuisine</b>                 | 17.7%     | 18.5%     | 17.6% | 9.7%   | 2.9%    | 15.0%  | 3.3%  | 9.6%   |
| <b>Prepared own meal</b>                     | 45.1%     | 38.1%     | 21.3% | 51.9%  | 25.1%   | 24.4%  | 14.6% | 42.1%  |

# ACTIVITIES - SHOPPING

|                                 | U.S. West | U.S. East | Japan | Canada | Oceania | China | Korea | Europe |
|---------------------------------|-----------|-----------|-------|--------|---------|-------|-------|--------|
| <b>TOTAL</b>                    | 98.3%     | 97.0%     | 98.7% | 98.8%  | 99.0%   | 96.8% | 98.8% | 98.2%  |
| <b>Malls/ department stores</b> | 51.8%     | 48.5%     | 87.1% | 66.7%  | 75.0%   | 78.2% | 80.1% | 68.8%  |
| <b>Designer boutiques</b>       | 24.8%     | 25.5%     | 21.6% | 24.6%  | 17.4%   | 20.9% | 6.6%  | 21.2%  |
| <b>Hotel/ resort stores</b>     | 47.7%     | 49.0%     | 40.0% | 42.3%  | 40.0%   | 51.2% | 44.0% | 38.7%  |
| <b>Swap meet/ flea market</b>   | 23.6%     | 21.1%     | 8.2%  | 20.7%  | 7.0%    | 8.8%  | 6.9%  | 10.6%  |
| <b>Discount/ outlet stores</b>  | 17.8%     | 19.3%     | 27.4% | 20.3%  | 34.0%   | 24.1% | 58.6% | 23.5%  |
| <b>Supermarkets</b>             | 64.0%     | 56.8%     | 67.4% | 64.4%  | 58.7%   | 63.2% | 66.5% | 75.0%  |
| <b>Farmer's market</b>          | 33.9%     | 29.8%     | 17.1% | 38.5%  | 10.7%   | 15.0% | 5.7%  | 32.7%  |
| <b>Convenience stores</b>       | 53.7%     | 53.2%     | 52.3% | 51.9%  | 69.8%   | 41.8% | 63.1% | 37.0%  |
| <b>Duty-free stores</b>         | 4.7%      | 3.9%      | 25.3% | 9.2%   | 9.1%    | 18.2% | 28.0% | 7.9%   |
| <b>Hawai'i-made products</b>    | 55.9%     | 59.0%     | 21.3% | 51.1%  | 31.9%   | 42.1% | 28.4% | 54.3%  |
| <b>Local shops and artisans</b> | 63.6%     | 67.4%     | 11.1% | 61.4%  | 44.0%   | 24.4% | 17.0% | 54.5%  |
| <b>Local fashion designers</b>  | 13.3%     | 11.7%     | 2.9%  | 12.5%  | 8.2%    | 0.0%  | 2.8%  | 15.8%  |

# ACTIVITIES - HISTORY, CULTURE & FINE ARTS

|   | U.S. West | U.S. East | Japan | Canada | Oceania | China | Korea | Europe |
|---|-----------|-----------|-------|--------|---------|-------|-------|--------|
| <b>TOTAL</b>  | 73.2%     | 80.4%     | 60.1% | 74.9%  | 69.4%   | 85.0% | 67.1% | 78.9%  |
| <b>Historic military sites and museums</b>          | 19.7%     | 32.6%     | 11.8% | 26.4%  | 38.9%   | 47.4% | 24.3% | 38.1%  |
| <b>Historic Hawaiian sites and museums</b>          | 37.8%     | 42.7%     | 16.8% | 41.7%  | 28.1%   | 42.1% | 13.6% | 41.7%  |
| <b>Other historical sites, museums, and homes</b>   | 15.1%     | 16.3%     | 10.2% | 15.5%  | 13.0%   | 15.0% | 17.9% | 15.4%  |
| <b>Art museums</b>                                  | 3.7%      | 4.3%      | 3.9%  | 3.5%   | 1.4%    | 0.0%  | 5.4%  | 5.5%   |
| <b>Art galleries and exhibitions</b>                | 11.0%     | 11.7%     | 6.8%  | 12.0%  | 4.7%    | 0.0%  | 2.4%  | 8.2%   |
| <b>Lū'au/ Polynesian show/ hula show</b>            | 27.1%     | 42.2%     | 11.0% | 29.6%  | 21.6%   | 11.8% | 16.5% | 31.9%  |
| <b>Lesson- ex. ukulele, hula, canoe, lei making</b> | 6.7%      | 8.7%      | 3.7%  | 6.3%   | 3.7%    | 3.2%  | 4.8%  | 9.4%   |
| <b>Play/ concert/ theatre</b>                       | 4.7%      | 3.5%      | 6.2%  | 7.0%   | 3.9%    | 0.0%  | 4.4%  | 5.2%   |
| <b>Art/ craft fair</b>                              | 12.8%     | 10.9%     | 4.2%  | 7.3%   | 1.9%    | 18.5% | 5.7%  | 6.4%   |
| <b>Festival/ event</b>                              | 4.3%      | 5.0%      | 6.5%  | 5.3%   | 2.5%    | 6.5%  | 1.7%  | 3.9%   |

# ACTIVITIES - TRANSPORTATION

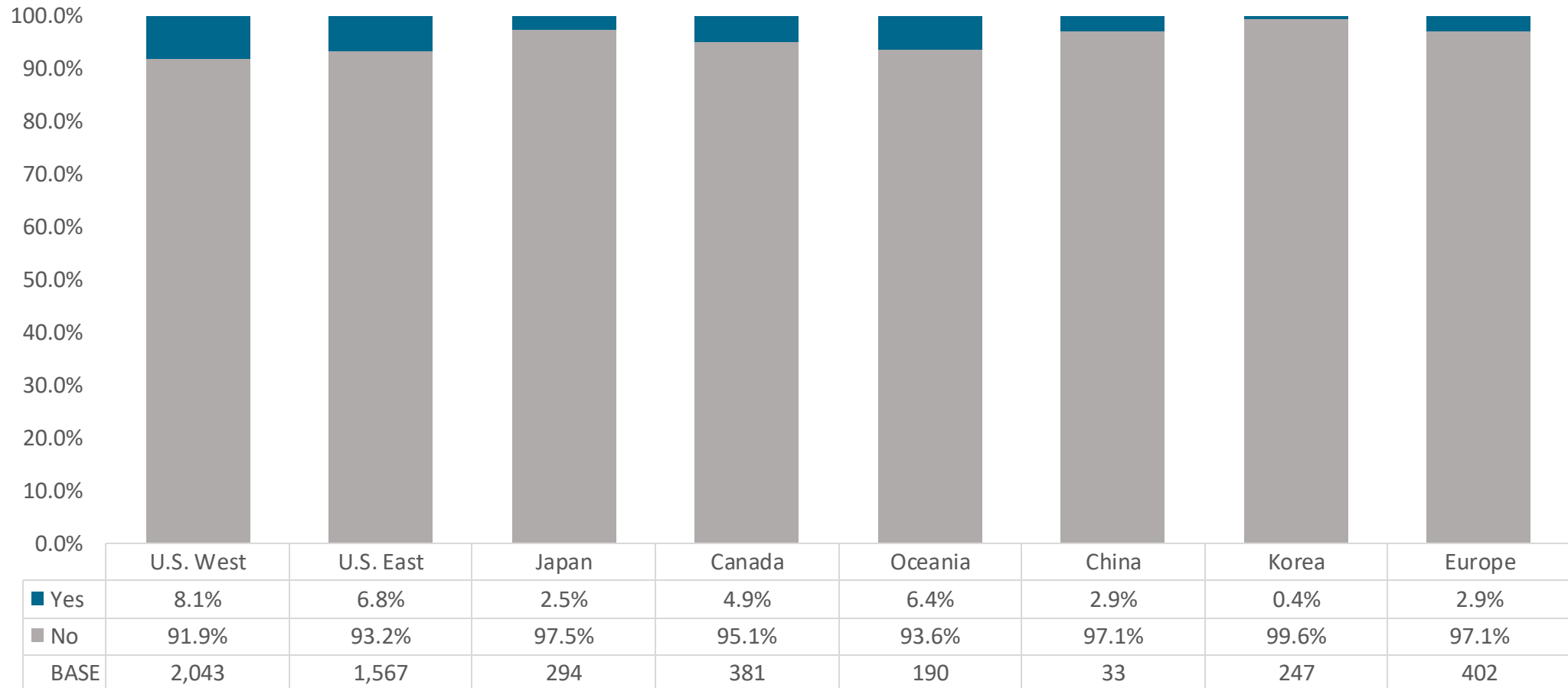
|                           | U.S. West | U.S. East | Japan | Canada | Oceania | China  | Korea | Europe |
|---------------------------|-----------|-----------|-------|--------|---------|--------|-------|--------|
| <b>TOTAL</b>              | 93.8%     | 93.8%     | 95.5% | 95.6%  | 97.9%   | 100.0% | 97.1% | 98.3%  |
| <b>Airport shuttle</b>    | 19.4%     | 18.3%     | 18.7% | 12.2%  | 26.1%   | 30.0%  | 15.5% | 20.8%  |
| <b>Trolley</b>            | 2.9%      | 3.1%      | 44.1% | 3.8%   | 14.1%   | 12.4%  | 30.0% | 4.4%   |
| <b>Public bus</b>         | 5.2%      | 5.1%      | 25.5% | 12.1%  | 18.9%   | 15.0%  | 13.0% | 20.6%  |
| <b>Tour bus/ tour van</b> | 9.4%      | 18.5%     | 22.3% | 14.8%  | 35.3%   | 8.8%   | 20.5% | 14.4%  |
| <b>Taxi/ limo</b>         | 6.0%      | 8.5%      | 29.8% | 13.7%  | 33.7%   | 17.9%  | 37.4% | 15.5%  |
| <b>Rental car</b>         | 74.8%     | 71.0%     | 24.2% | 69.9%  | 22.6%   | 64.1%  | 58.3% | 71.0%  |
| <b>Ride share</b>         | 21.2%     | 25.9%     | 23.6% | 26.7%  | 52.8%   | 42.4%  | 23.8% | 28.6%  |
| <b>Car share</b>          | 4.3%      | 3.9%      | 2.1%  | 5.3%   | 4.3%    | 2.9%   | 1.6%  | 1.8%   |
| <b>Bicycle rental</b>     | 2.0%      | 2.7%      | 2.7%  | 1.9%   | 1.1%    | 9.1%   | 2.4%  | 2.5%   |

# ACTIVITIES - OTHER

|   | U.S. West | U.S. East | Japan | Canada | Oceania | China | Korea | Europe |
|---|-----------|-----------|-------|--------|---------|-------|-------|--------|
| <b>TOTAL</b>  | 40.9%     | 35.5%     | 16.3% | 26.3%  | 17.4%   | 21.5% | 18.1% | 16.0%  |
| <b>Visiting friends/ family</b>                         | 31.8%     | 25.6%     | 13.1% | 18.2%  | 13.7%   | 12.6% | 14.4% | 10.0%  |
| <b>Volunteering/ giving back to the local community</b> | 2.2%      | 2.6%      | 1.0%  | 3.3%   | 0.7%    | 0.0%  | 0.9%  | 2.1%   |
| <b>Health and wellness activities</b>                   | 11.6%     | 11.6%     | 3.6%  | 7.7%   | 3.6%    | 8.8%  | 3.2%  | 5.6%   |

# Section 3 – Travelers with Disabilities

# DISABLED TRAVELER - REQUIRED ASSISTANCE

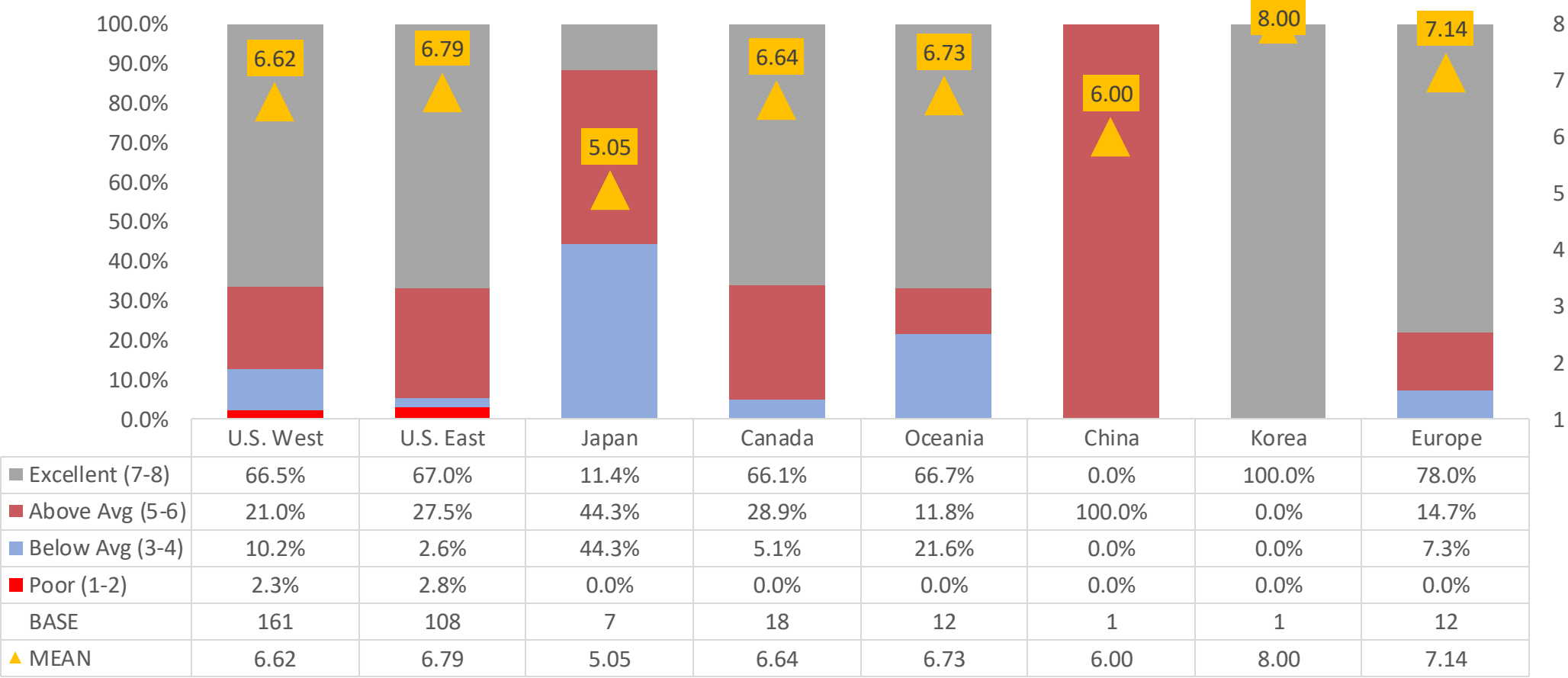


# DISABLED TRAVELER - REQUIRED ASSISTANCE

|                                      | U.S. West | U.S. East | Japan | Canada | Oceania | China  | Korea  | Europe |
|--------------------------------------|-----------|-----------|-------|--------|---------|--------|--------|--------|
| Mobility aid                         | 74.8%     | 72.7%     | 41.0% | 55.4%  | 72.5%   | 0.0%   | 0.0%   | 38.4%  |
| Personal assistance                  | 25.0%     | 20.9%     | 0.0%  | 24.0%  | 27.5%   | 0.0%   | 100.0% | 18.1%  |
| Other                                | 9.2%      | 10.5%     | 0.0%  | 14.2%  | 5.9%    | 0.0%   | 0.0%   | 14.7%  |
| NA- No one needed assistance         | 5.3%      | 2.8%      | 59.0% | 11.1%  | 0.0%    | 100.0% | 0.0%   | 18.1%  |
| Orientation and Mobility Assistance  | 3.9%      | 7.1%      | 0.0%  | 17.6%  | 11.8%   | 0.0%   | 0.0%   | 9.0%   |
| Lift equipped van                    | 2.1%      | 1.7%      | 0.0%  | 0.0%   | 0.0%    | 0.0%   | 0.0%   | 9.0%   |
| ASL Interpreter/ texting/ captioning | 2.1%      | 0.9%      | 0.0%  | 4.7%   | 0.0%    | 0.0%   | 0.0%   | 0.0%   |
| Service/ assistance animal           | 1.1%      | 0.0%      | 0.0%  | 0.0%   | 0.0%    | 0.0%   | 0.0%   | 0.0%   |
| Print material in alternate format   | 0.6%      | 0.0%      | 0.0%  | 0.0%   | 0.0%    | 0.0%   | 0.0%   | 9.0%   |
| BASE                                 | 168       | 109       | 7     | 19     | 12      | 1      | 1      | 12     |

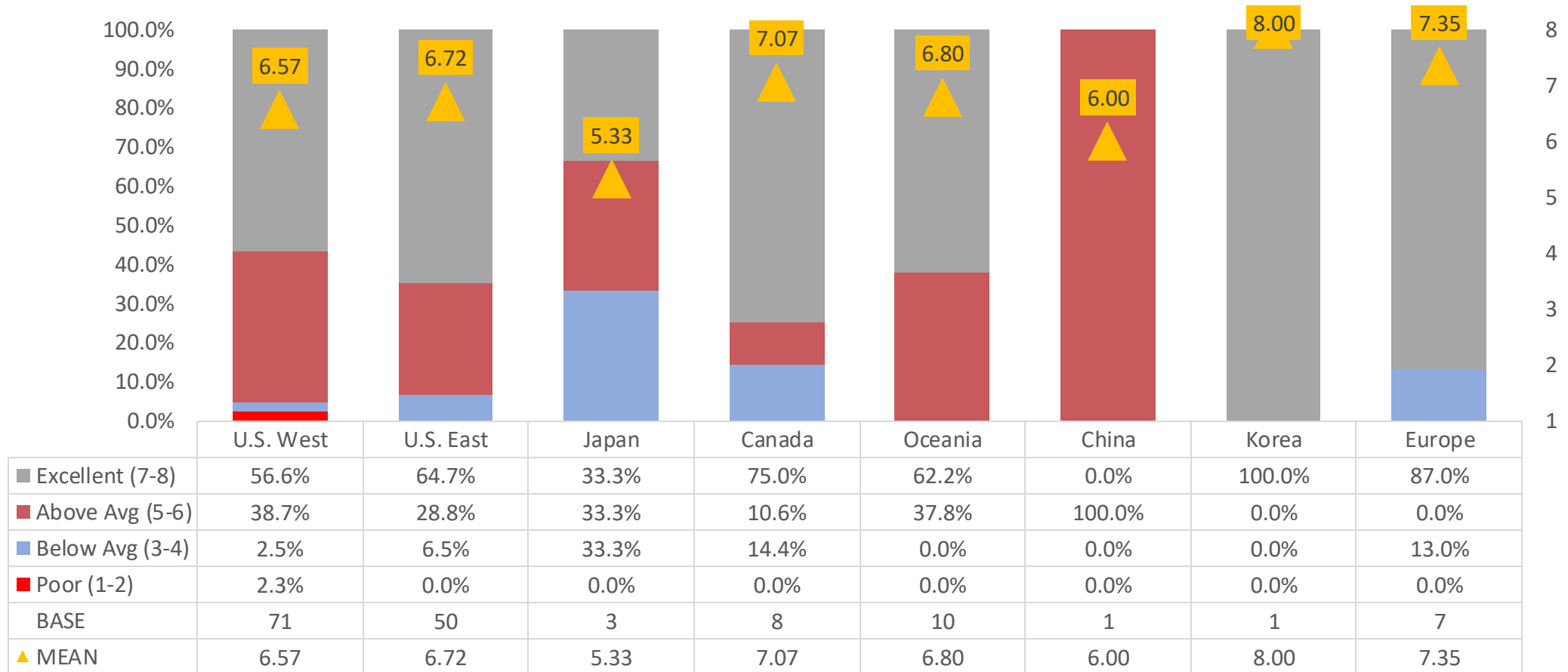
# OVERALL ACCESSIBILITY - AIRPORTS

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



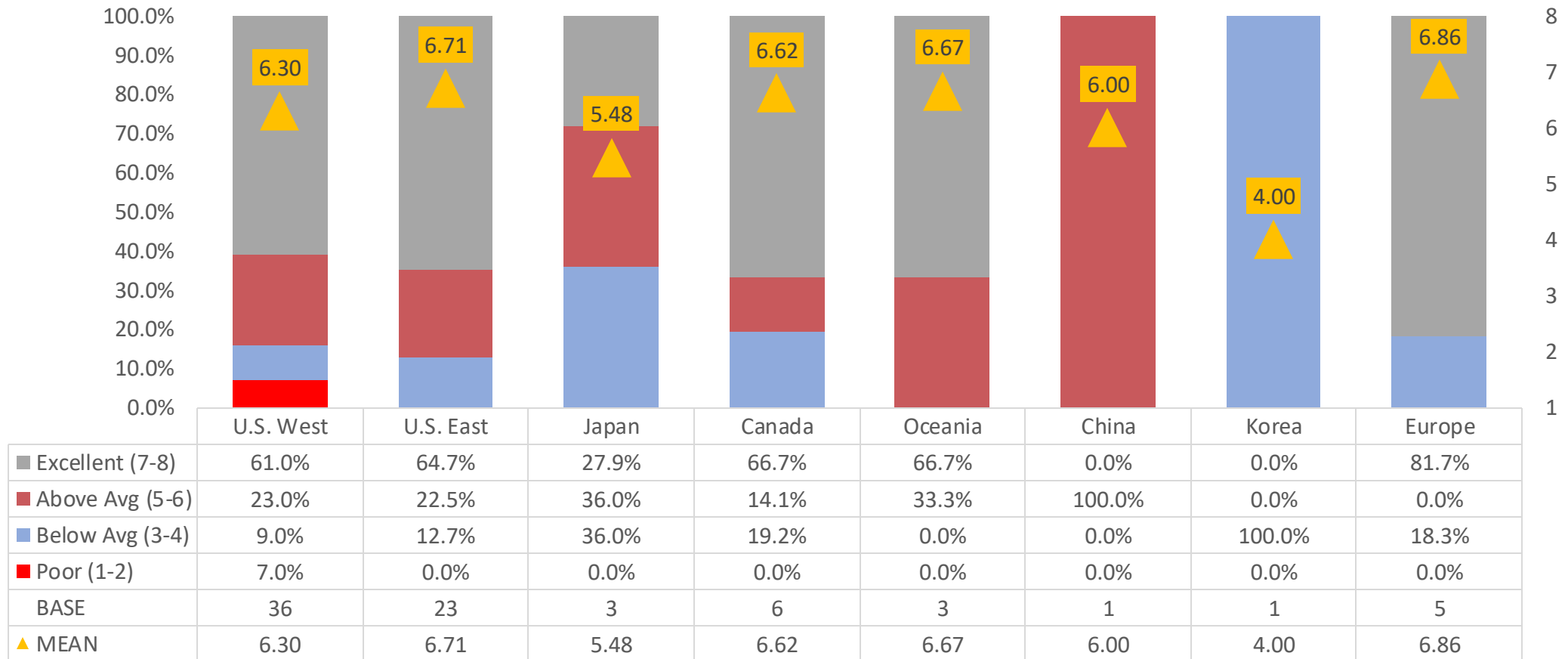
# OVERALL ACCESSIBILITY - PRIVATE TRANSPORTATION

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



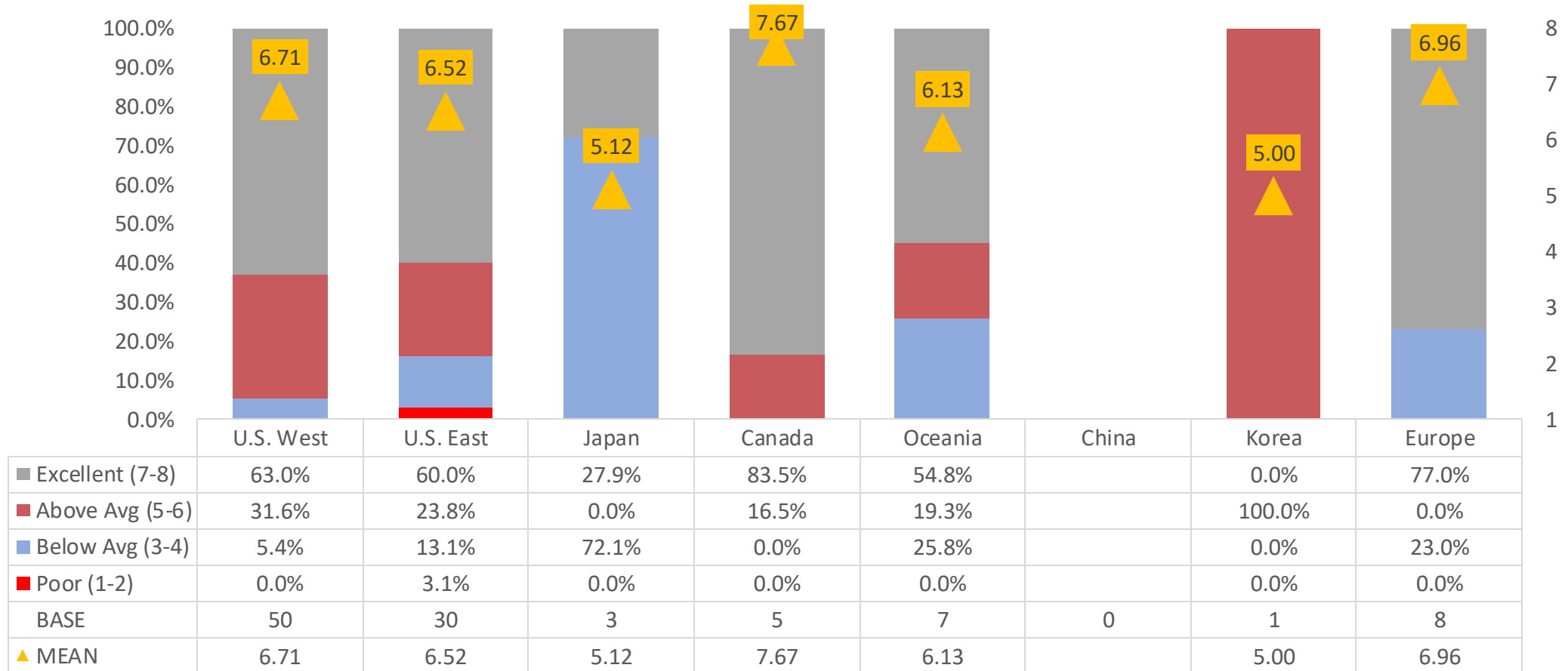
# OVERALL ACCESSIBILITY - PUBLIC TRANSPORTATION

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



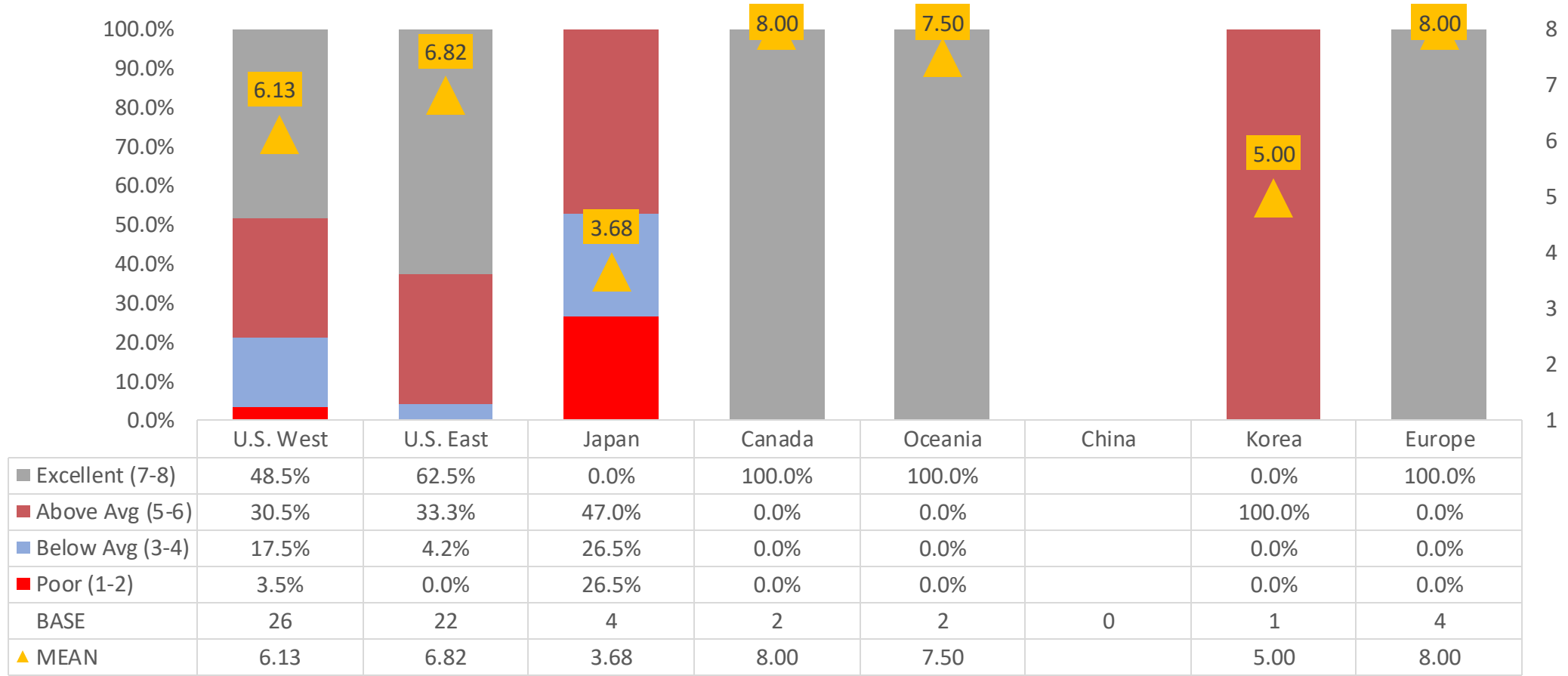
# OVERALL ACCESSIBILITY - RIDE SHARE/ CAR SHARE

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



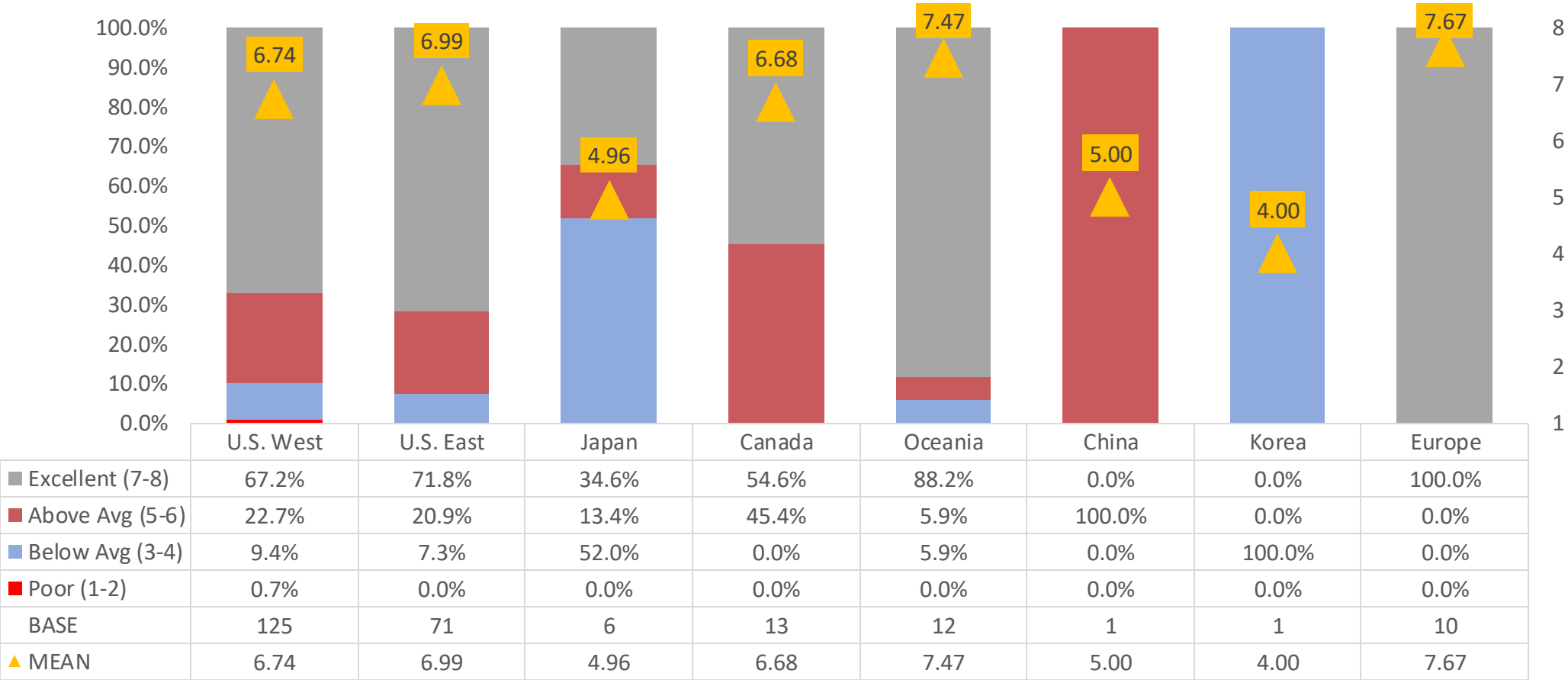
# OVERALL ACCESSIBILITY - DEPARTMENT OF AGRICULTURE ANIMAL QUARANTINE

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



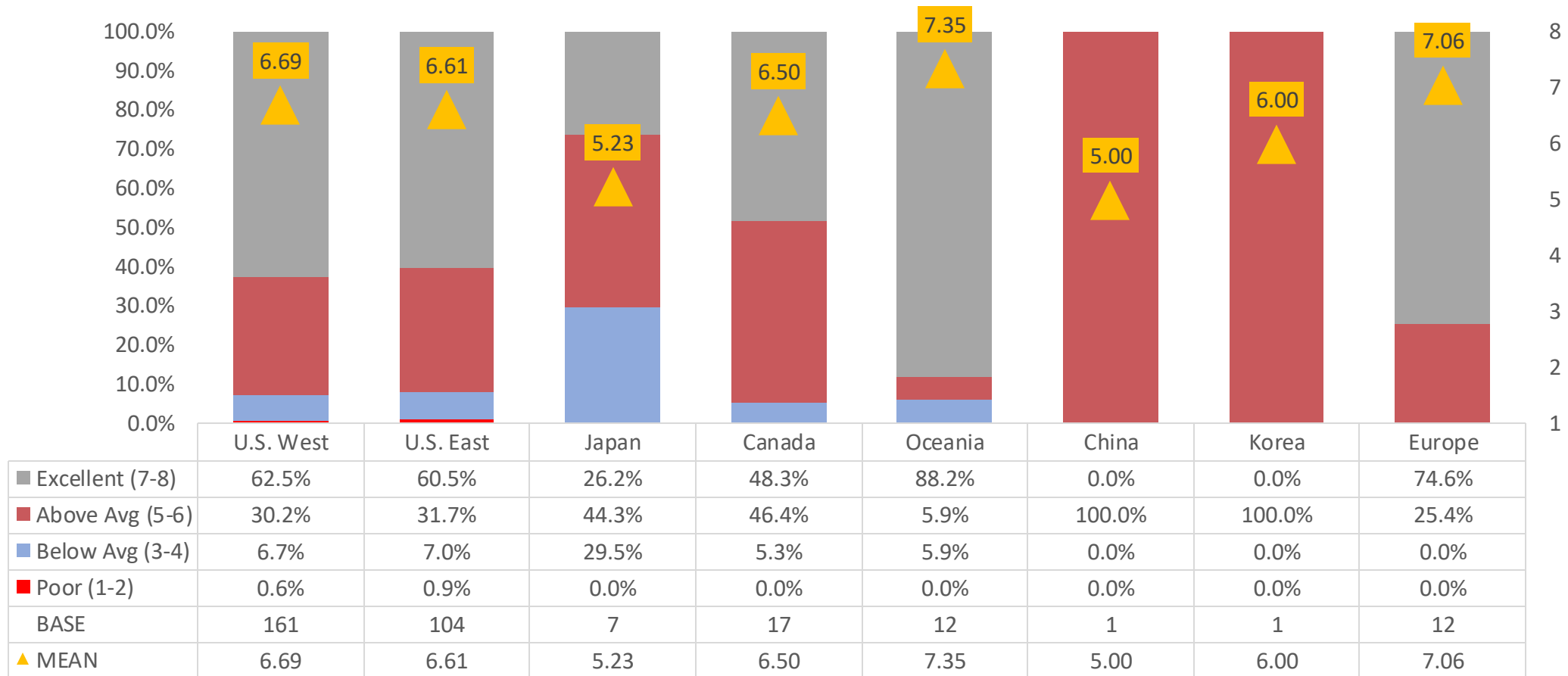
# OVERALL ACCESSIBILITY - HOTELS

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



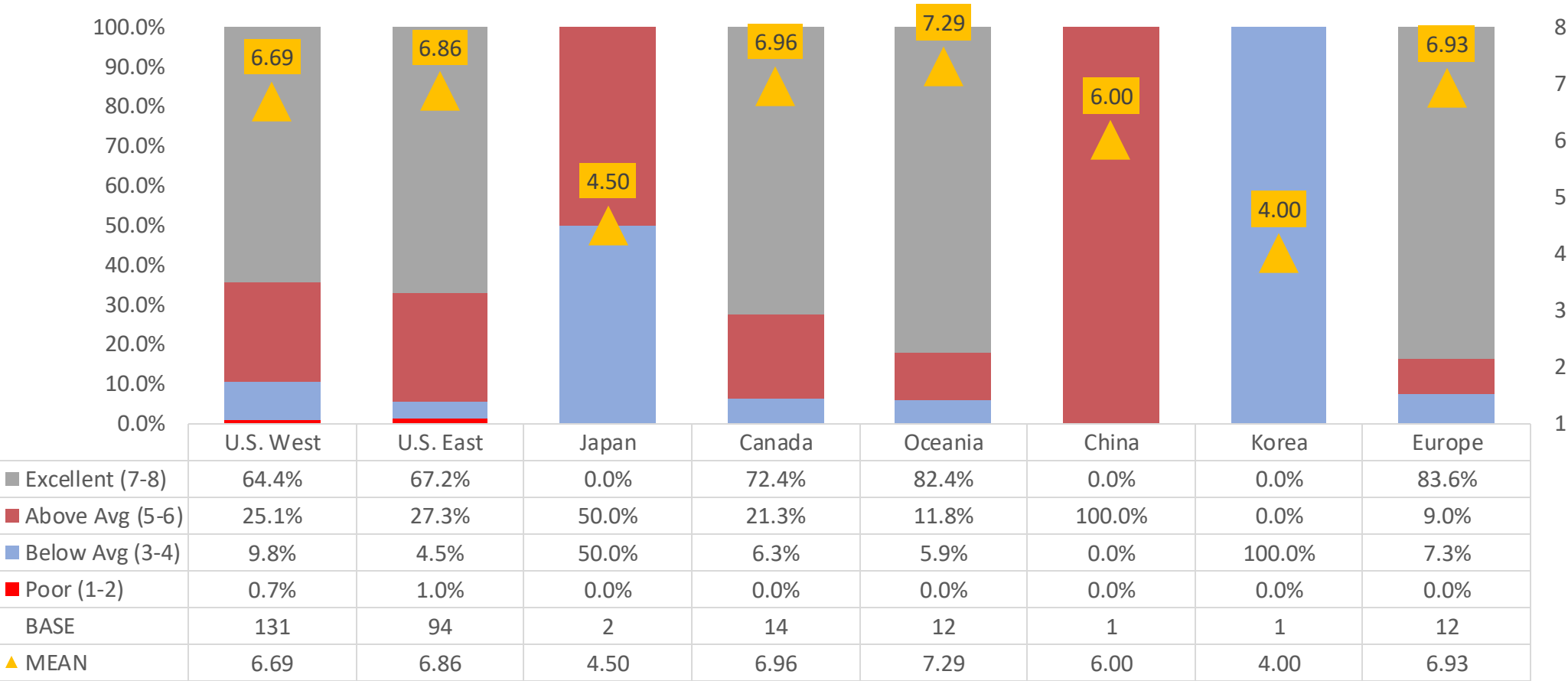
# OVERALL ACCESSIBILITY – RESTAURANTS

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



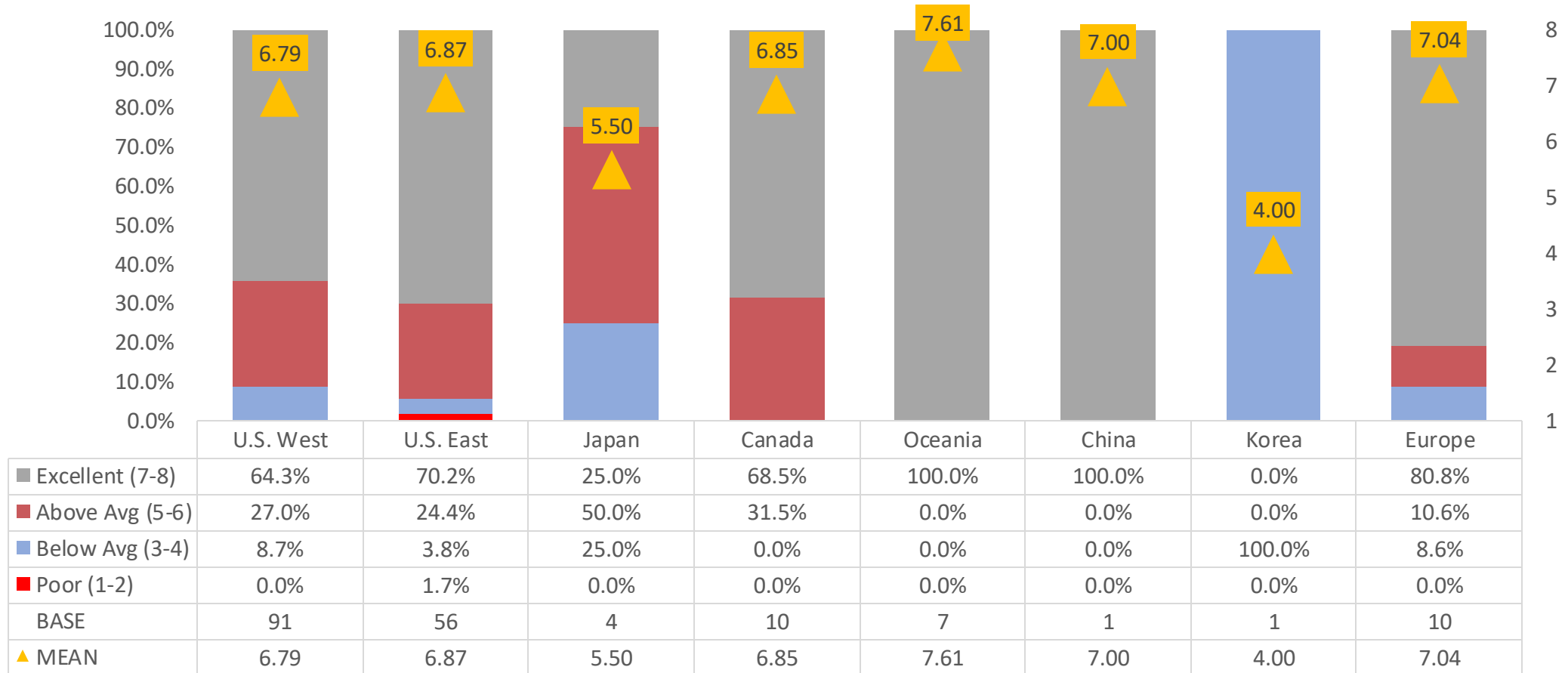
# OVERALL ACCESSIBILITY - PUBLIC ATTRACTIONS

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



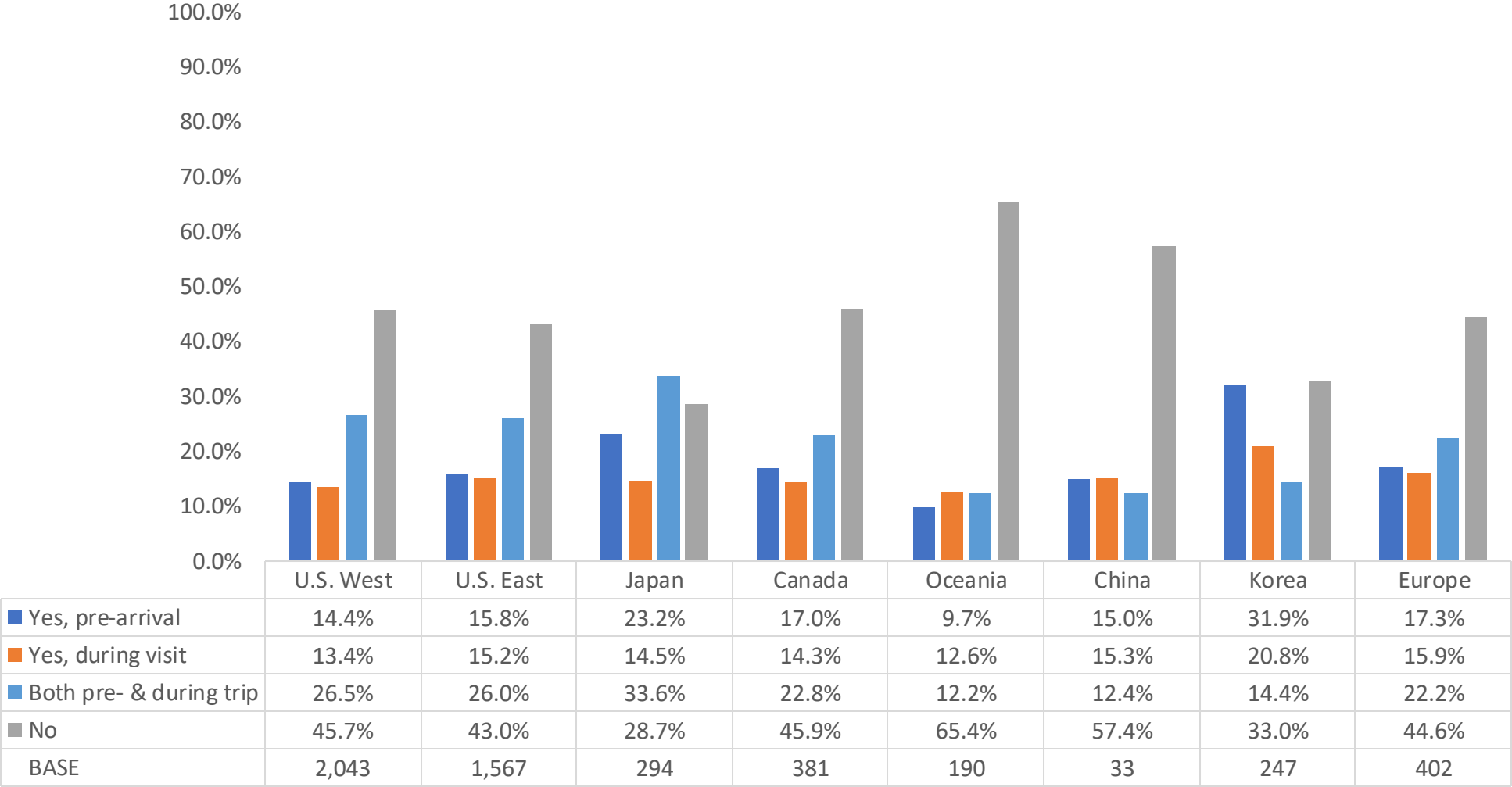
# OVERALL ACCESSIBILITY - PRIVATE ATTRACTIONS

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

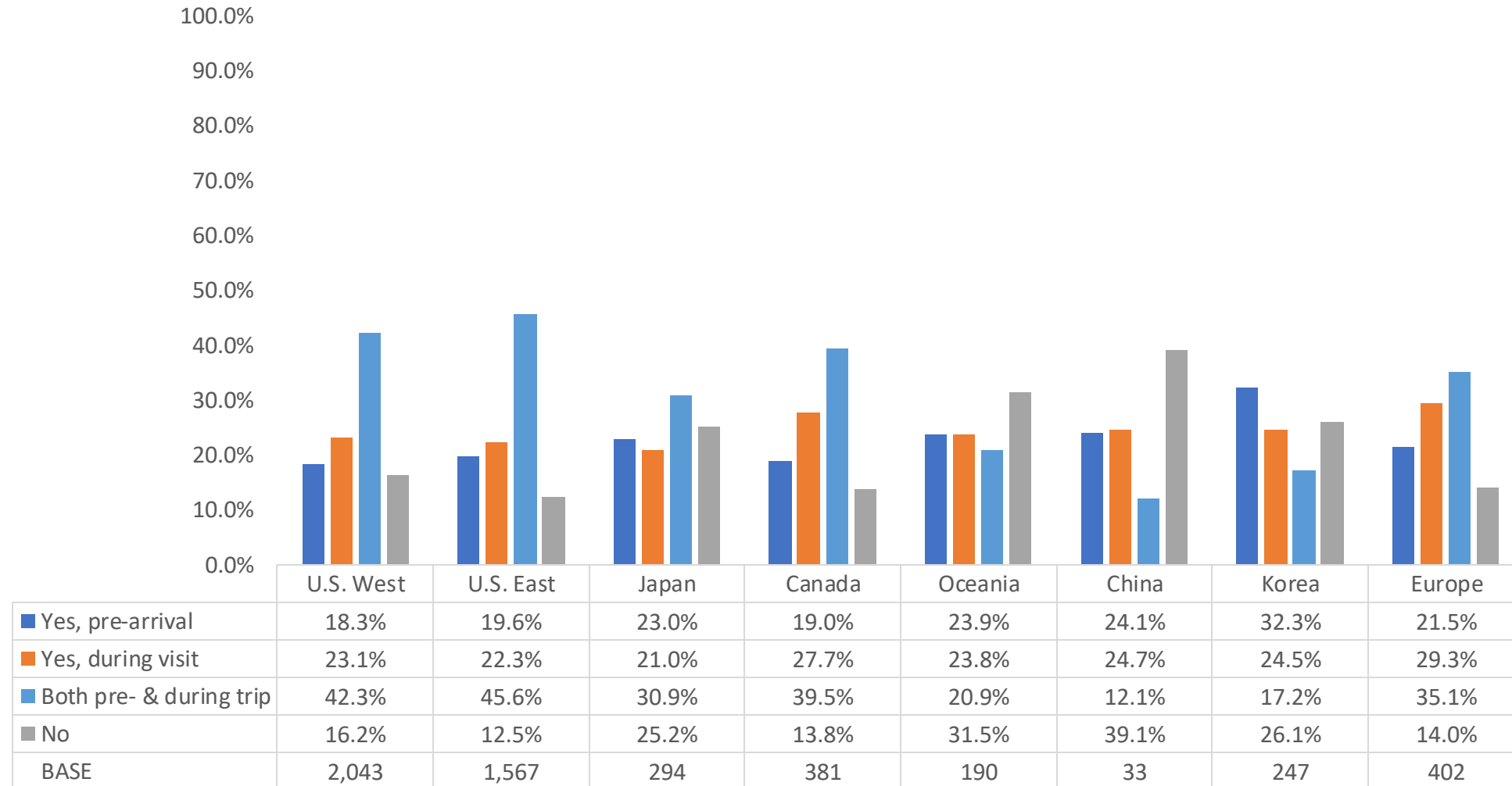


# Section 4 – Messaging

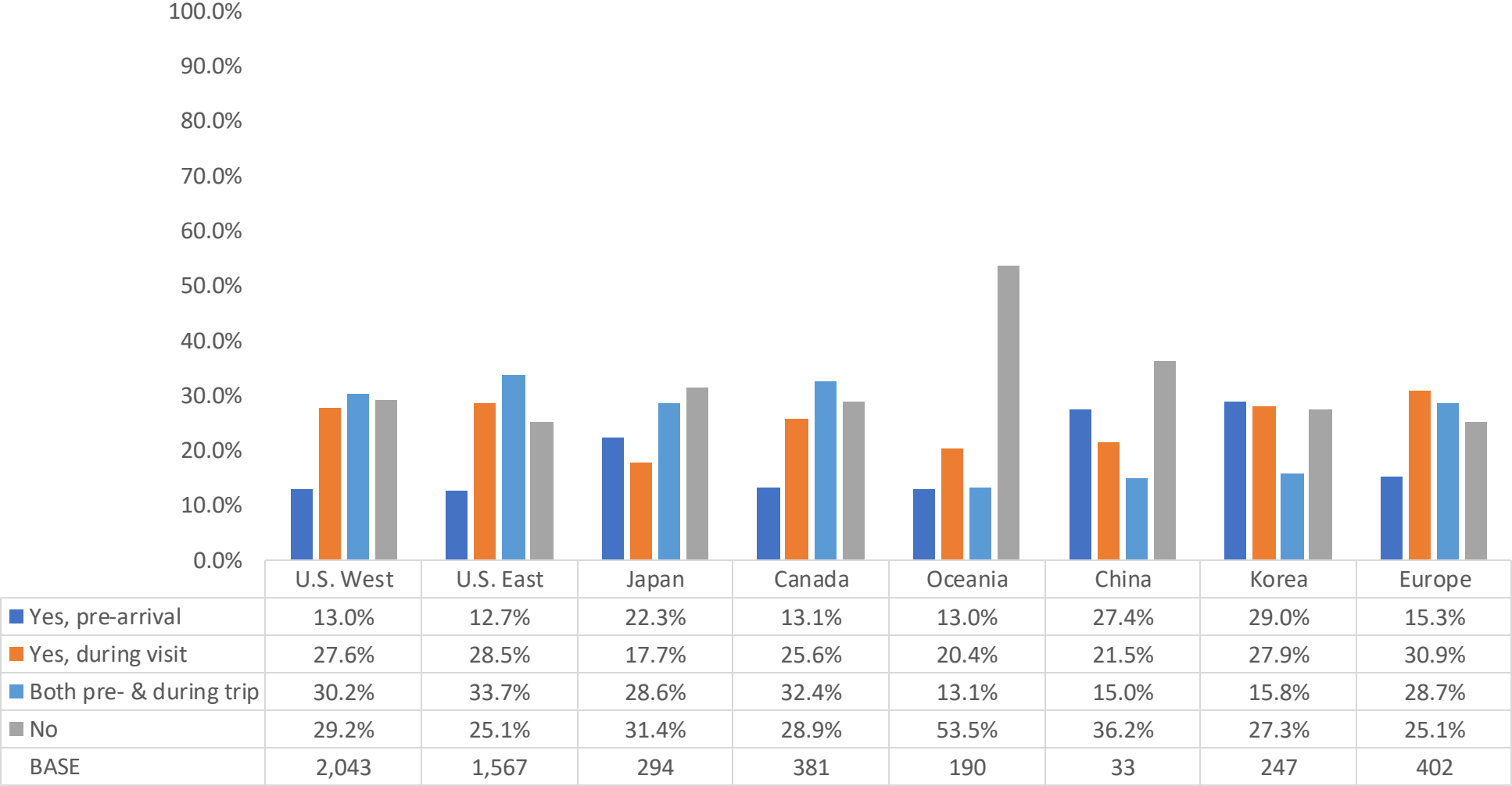
# SAFE AND RESPONSIBLE TRAVEL



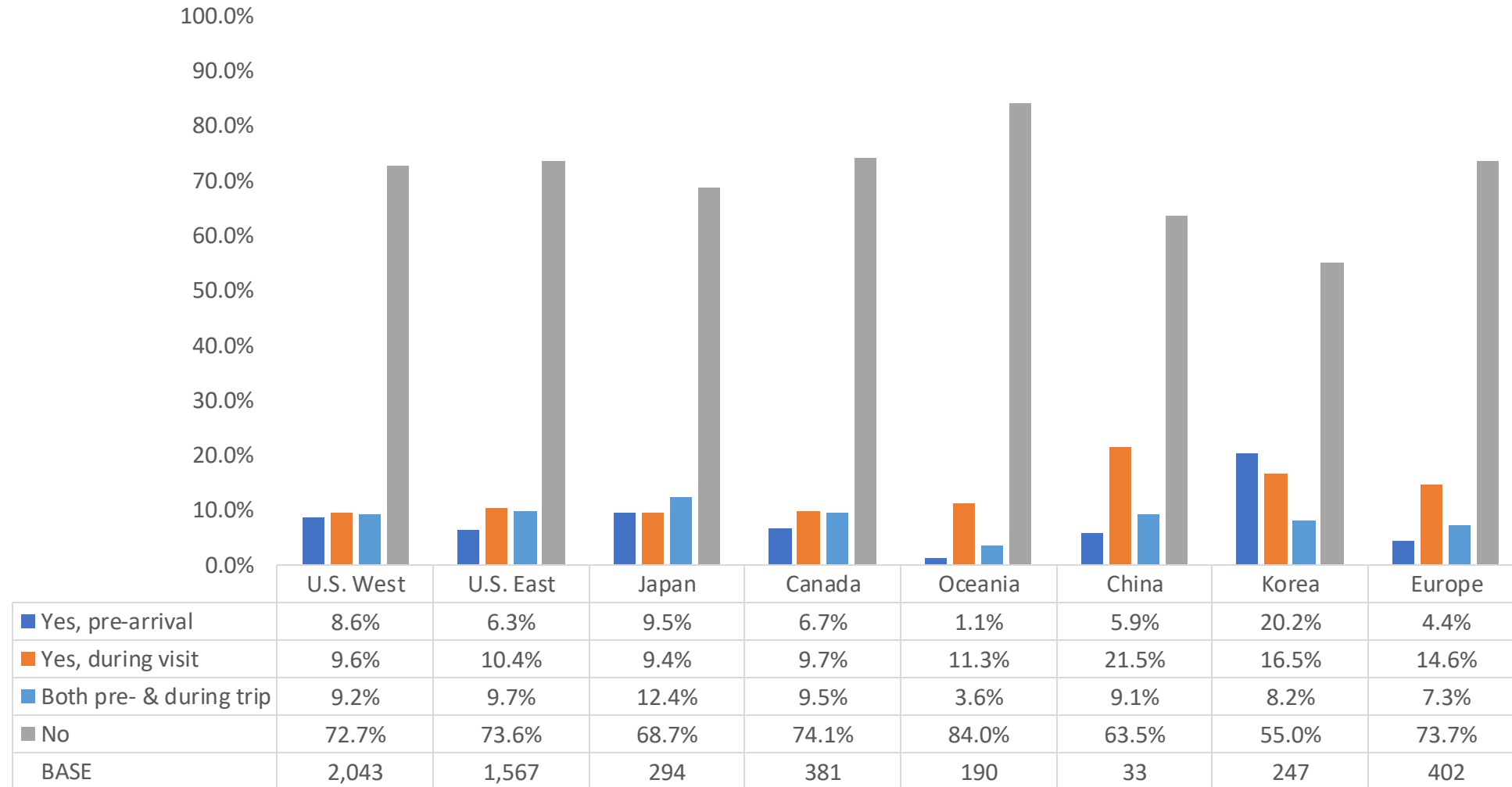
# CARING FOR AND RESPECTING HAWAI'I'S CULTURE, PEOPLE AND ENVIRONMENT



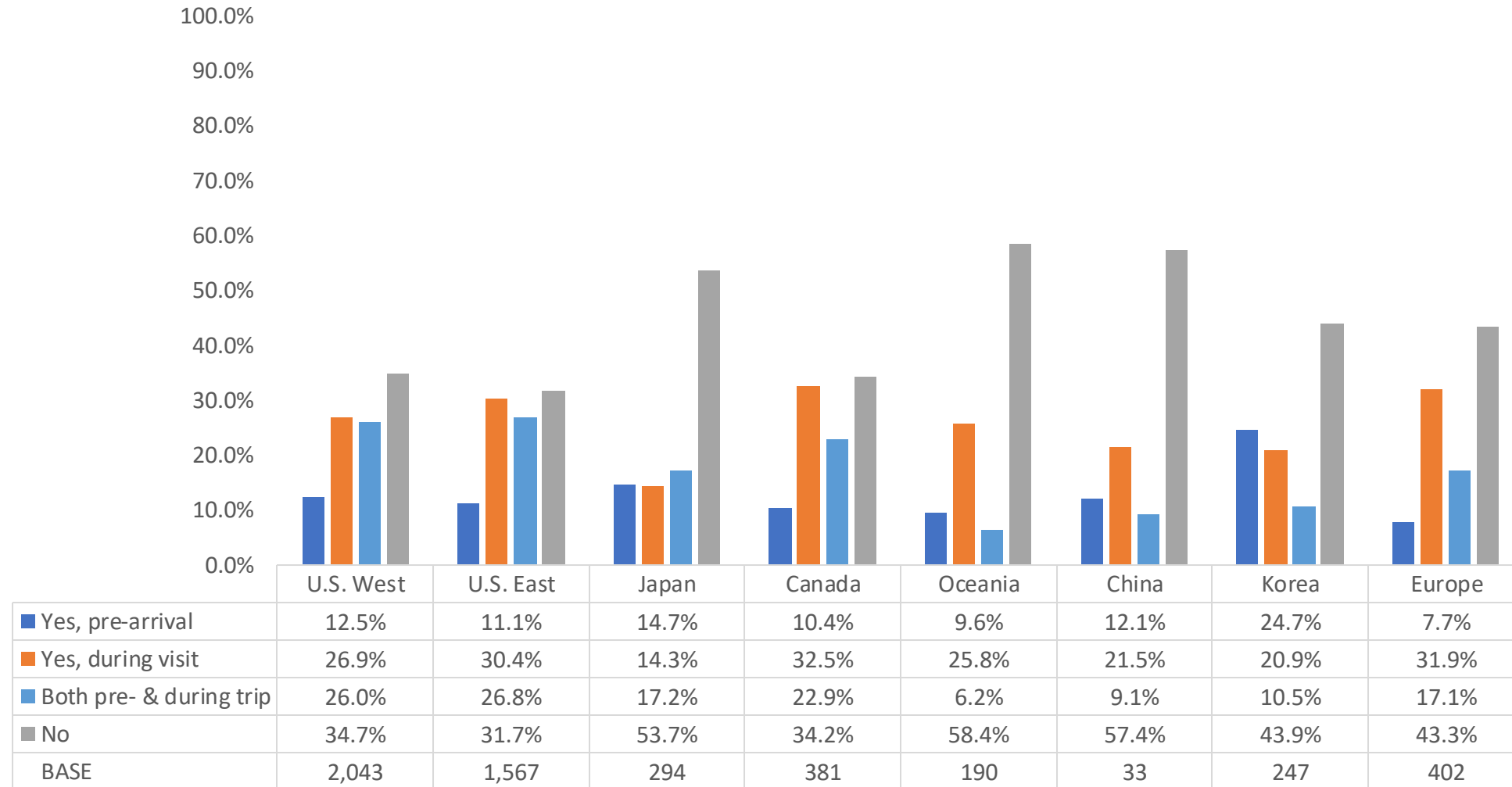
# OCEAN AND HIKING SAFETY



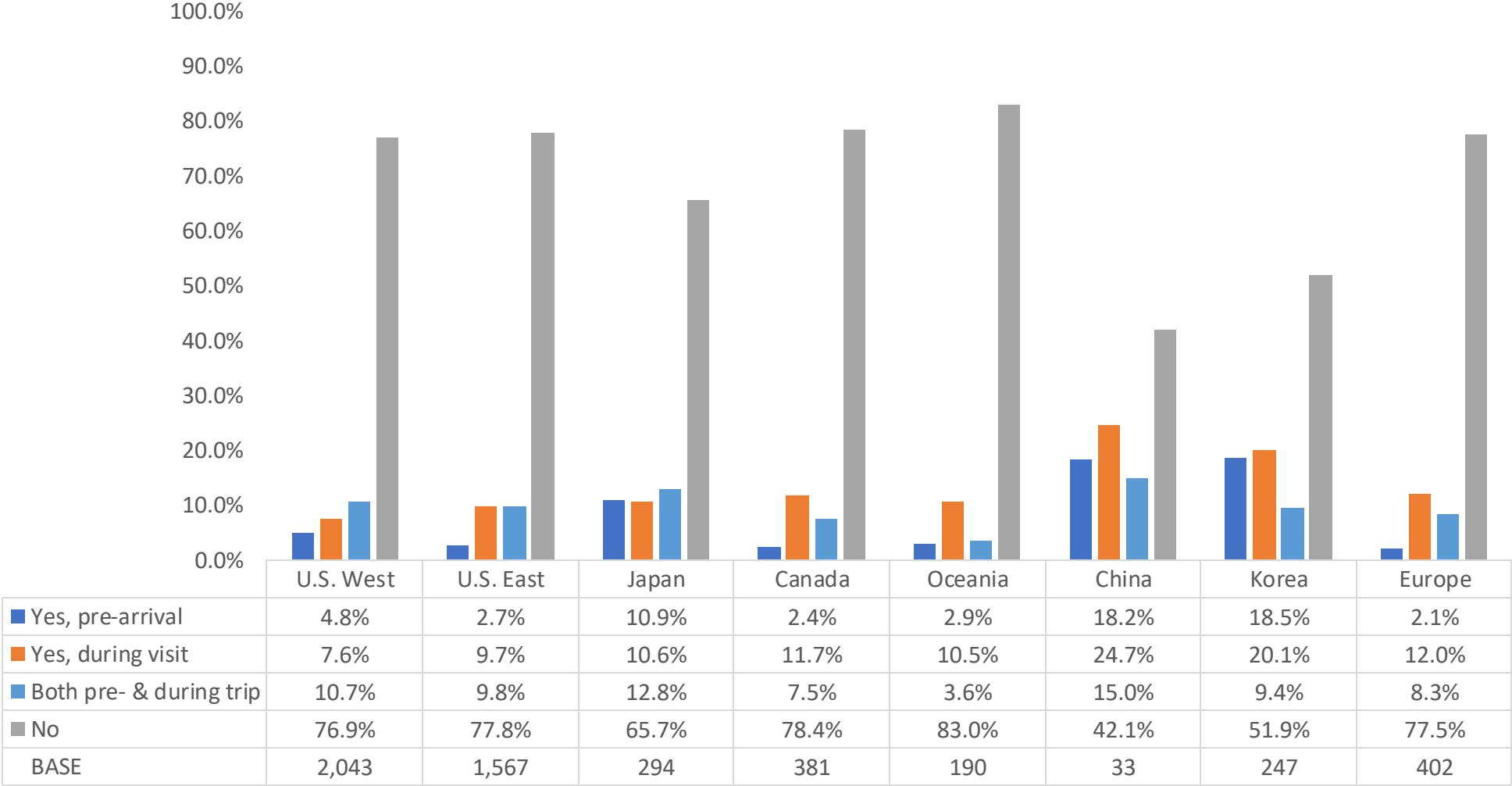
# VOLUNTEER / GIVE-BACK OPPORTUNITIES



# SUPPORT LOCAL / SHOP LOCAL

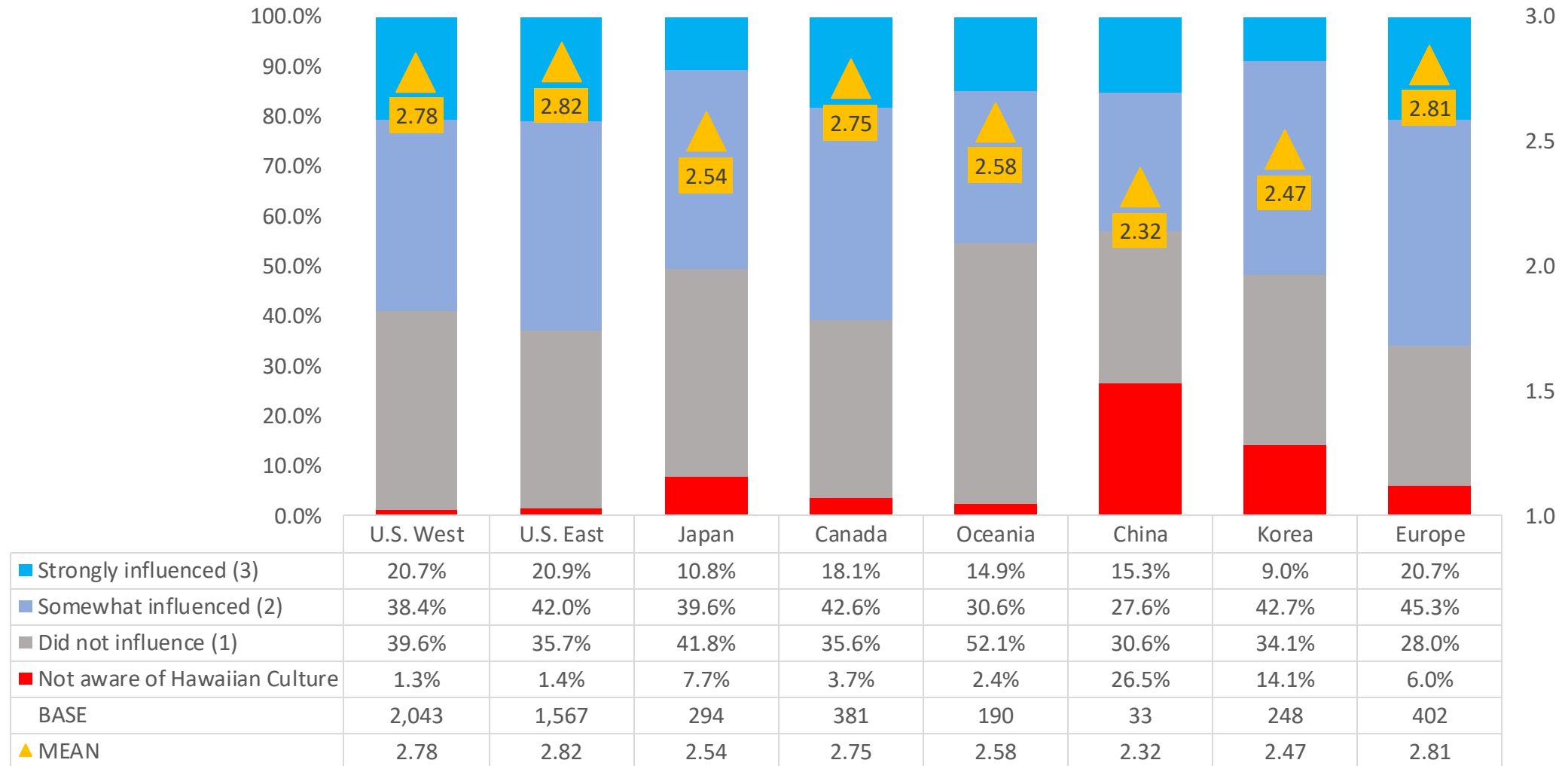


# MĀLAMA HAWAI‘I



# Section 5 – Hawaiian Culture

# HAWAIIAN CULTURE IMPACT ON TRIP PLANNING



# Section 6 – Destination Drivers

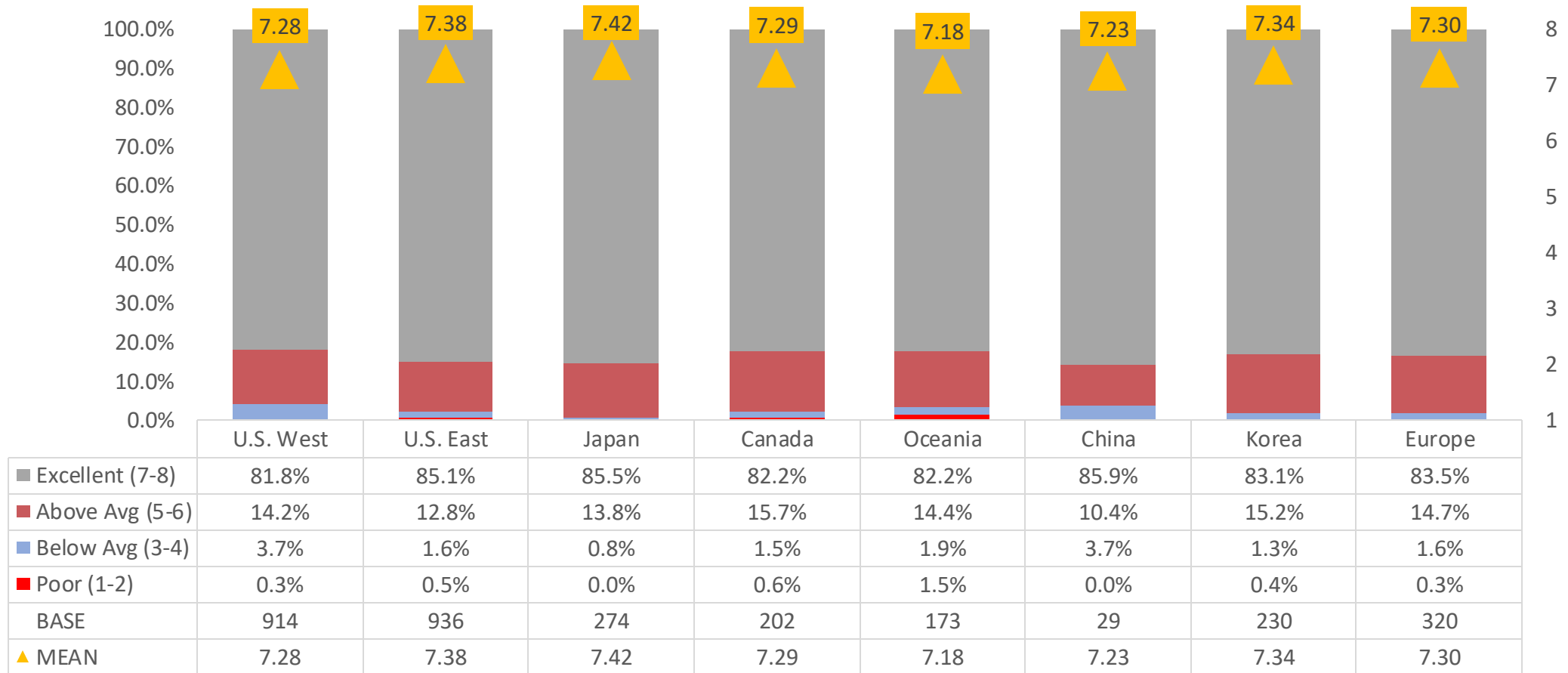
# DESTINATION DRIVERS

|  | U.S. West | U.S. East | Japan | Canada | Oceania | Korea | China | Europe |
|--|-----------|-----------|-------|--------|---------|-------|-------|--------|
| Time with family and friends, influence of family/ friends | 17.0%     | 17.2%     | 3.7%  | 10.2%  | 7.6%    | 6.6%  | 2.9%  | 6.1%   |
| Personal connection, repeat visitor                        | 16.2%     | 12.7%     | 7.3%  | 13.3%  | 4.9%    | 2.6%  | 0.0%  | 6.9%   |
| Natural beauty and scenery                                 | 12.7%     | 13.9%     | 5.2%  | 13.0%  | 1.9%    | 14.2% | 12.4% | 24.6%  |
| Personal preference, love Hawai'i                          | 10.7%     | 9.2%      | 18.7% | 12.3%  | 9.2%    | 4.4%  | 8.8%  | 8.8%   |
| First-time visitor, wanted to experience Hawai'i           | 7.7%      | 15.4%     | 4.7%  | 12.9%  | 13.4%   | 3.5%  | 8.8%  | 16.9%  |
| Special event or occasion, incl honeymoon                  | 8.5%      | 9.4%      | 7.3%  | 7.7%   | 2.9%    | 4.7%  | 3.2%  | 6.2%   |
| Beaches, ocean activities                                  | 10.0%     | 6.4%      | 2.7%  | 11.8%  | 6.6%    | 5.3%  | 3.2%  | 8.0%   |
| Vacation, leisure  | 9.1%      | 5.1%      | 6.6%  | 5.0%   | 15.2%   | 14.5% | 0.0%  | 5.9%   |
| Convenience, proximity, location                           | 8.3%      | 2.6%      | 3.7%  | 6.3%   | 45.7%   | 3.3%  | 0.0%  | 6.7%   |
| Weather, climate   | 6.9%      | 5.0%      | 5.7%  | 8.5%   | 5.6%    | 8.6%  | 9.7%  | 3.5%   |
| Work, business trip  | 5.2%      | 7.1%      | 2.2%  | 3.8%   | 1.1%    | 1.7%  | 2.9%  | 1.8%   |
| Hawaiian culture, the aloha spirit                         | 5.0%      | 4.0%      | 2.5%  | 6.2%   | 3.2%    | 1.7%  | 0.0%  | 6.7%   |

# Section 7 – O‘ahu

# SATISFACTION - O'AHU

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



# SATISFACTION – O‘AHU

- ***Islands visited:*** Visitors from **U.S. West, U.S. East, Japan** 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.
- ***Education:*** Those with a college degree from **U.S. West** were more satisfied with their stay than those without a college degree.
- ***Gender:*** Female visitors from **Oceania** were more satisfied with their stay than male visitors.

# SATISFACTION - O'AHU

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

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

|           | Q3 2016 | Q3 2017 | Q3 2018 | Q3 2019 | Q3 2020 | Q3 2021 | Q3 2022 | Q3 2023 | Q3 2024 | Q3 2025 P |
|-----------|---------|---------|---------|---------|---------|---------|---------|---------|---------|-----------|
| U.S. West | 81.3%   | 82.4%   | 80.5%   | 80.7%   | 47.6%   | 81.8%   | 85.6%   | 84.4%   | 84.4%   | 81.8%     |
| U.S. East | 77.2%   | 81.5%   | 78.8%   | 78.9%   | 52.8%   | 81.8%   | 83.9%   | 85.7%   | 83.5%   | 85.1%     |
| Japan     | 77.1%   | 79.2%   | 74.8%   | 78.2%   |         |         | 72.9%   | 81.0%   | 81.8%   | 85.5%     |
| Canada    | 77.3%   | 83.8%   | 80.9%   | 82.4%   |         |         | 83.7%   | 83.9%   | 84.9%   | 82.2%     |
| Oceania   | 77.4%   | 80.2%   | 76.0%   | 80.0%   |         |         | 76.8%   | 76.5%   | 75.5%   | 82.2%     |
| Korea     | 73.5%   | 69.0%   | 71.4%   | 74.5%   |         |         | 83.3%   | 85.5%   | 83.4%   | 83.1%     |
| China     | 79.1%   | 82.7%   | 69.2%   | 65.8%   |         |         | 76.1%   | 84.8%   | 76.0%   | 85.9%     |
| Europe    | 77.8%   | 77.4%   | 77.2%   | 79.6%   |         |         |         |         | 84.1%   | 83.5%     |

P= Preliminary Data

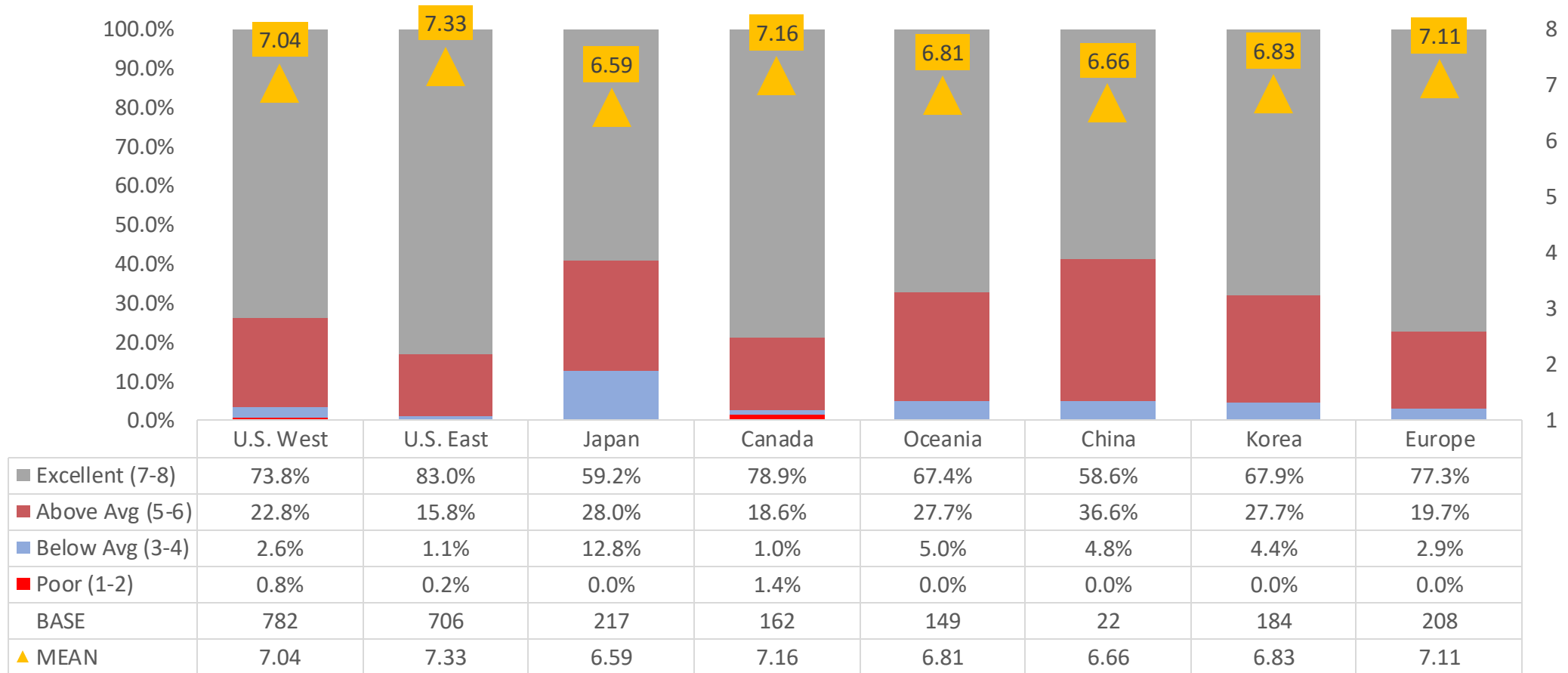
Q. How would you rate your most recent trip to the state of Hawai'i? How would you rate your experience on\_\_\_?

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



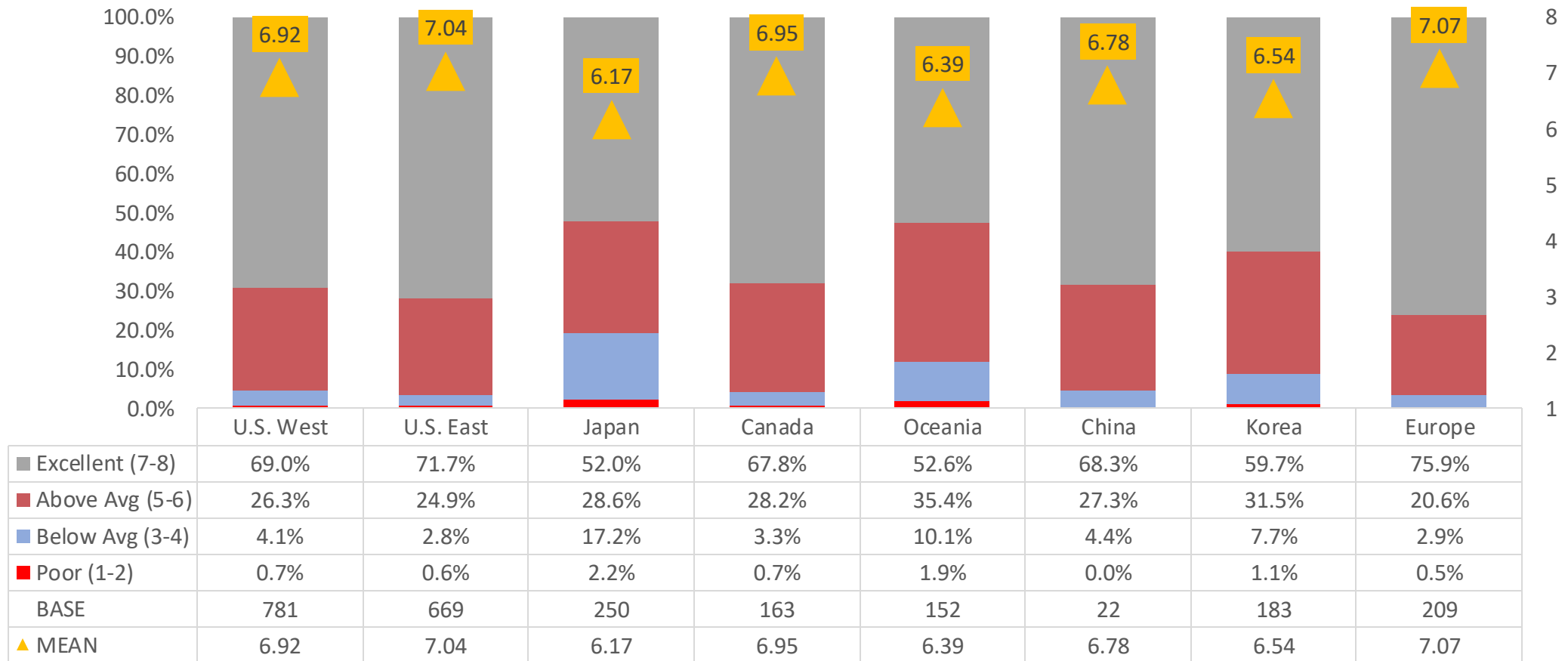
# ENTERTAINMENT/ ATTRACTIONS - O'AHU

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



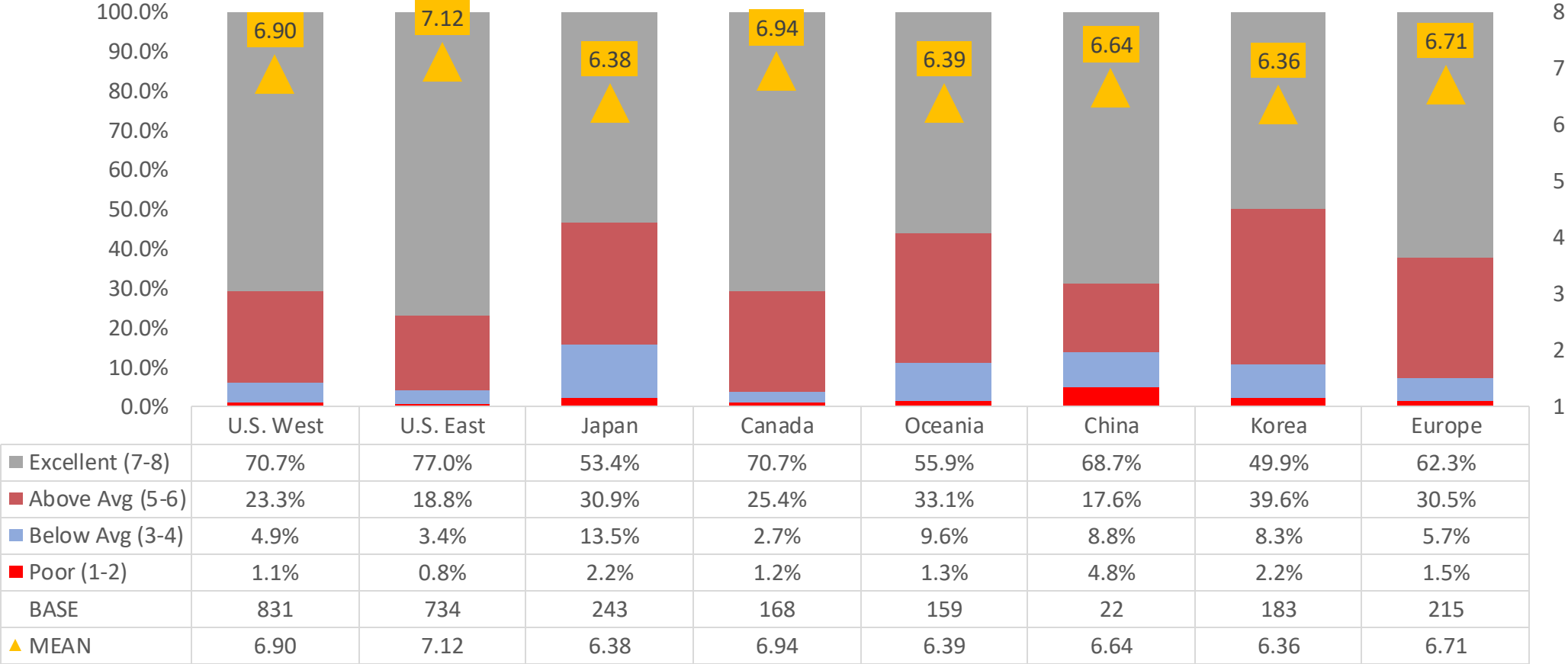
# SHOPPING - O'AHU

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



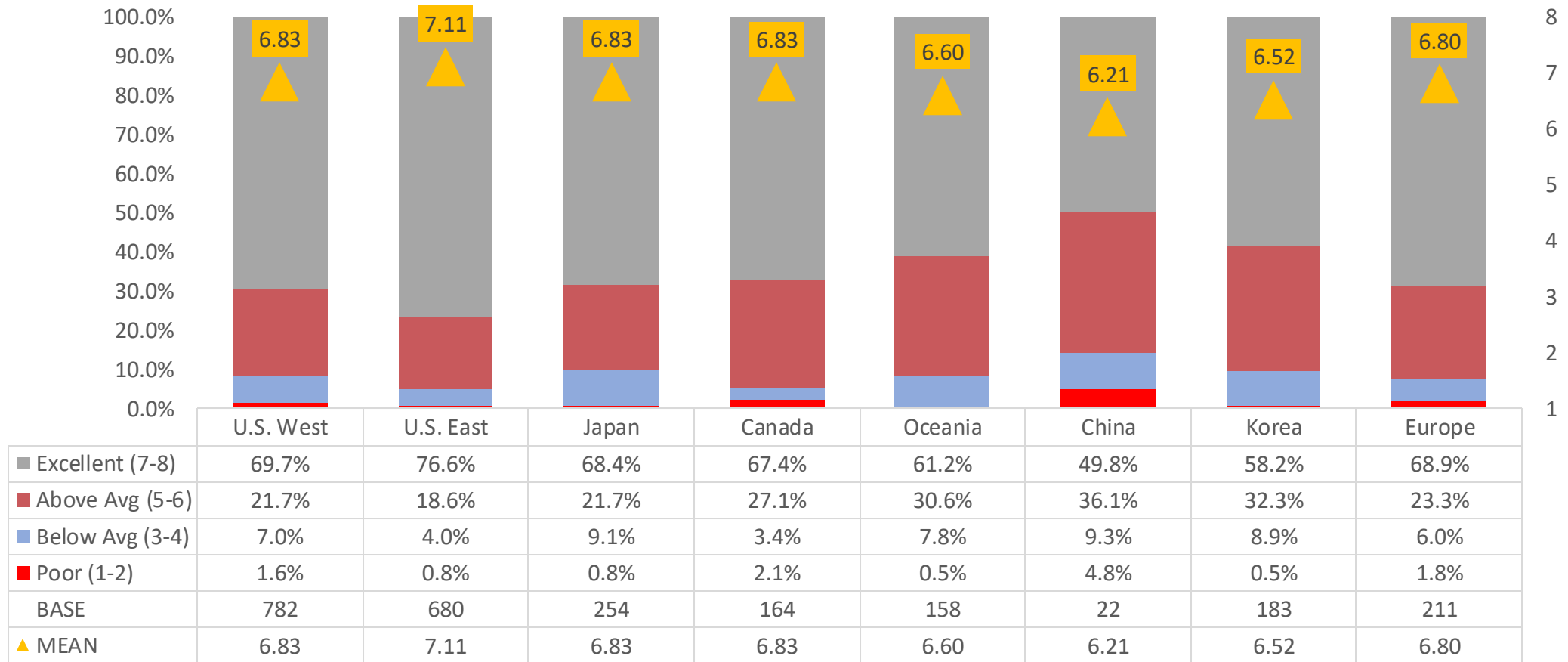
# DINING/ FOOD & BEVERAGES - O'AHU

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



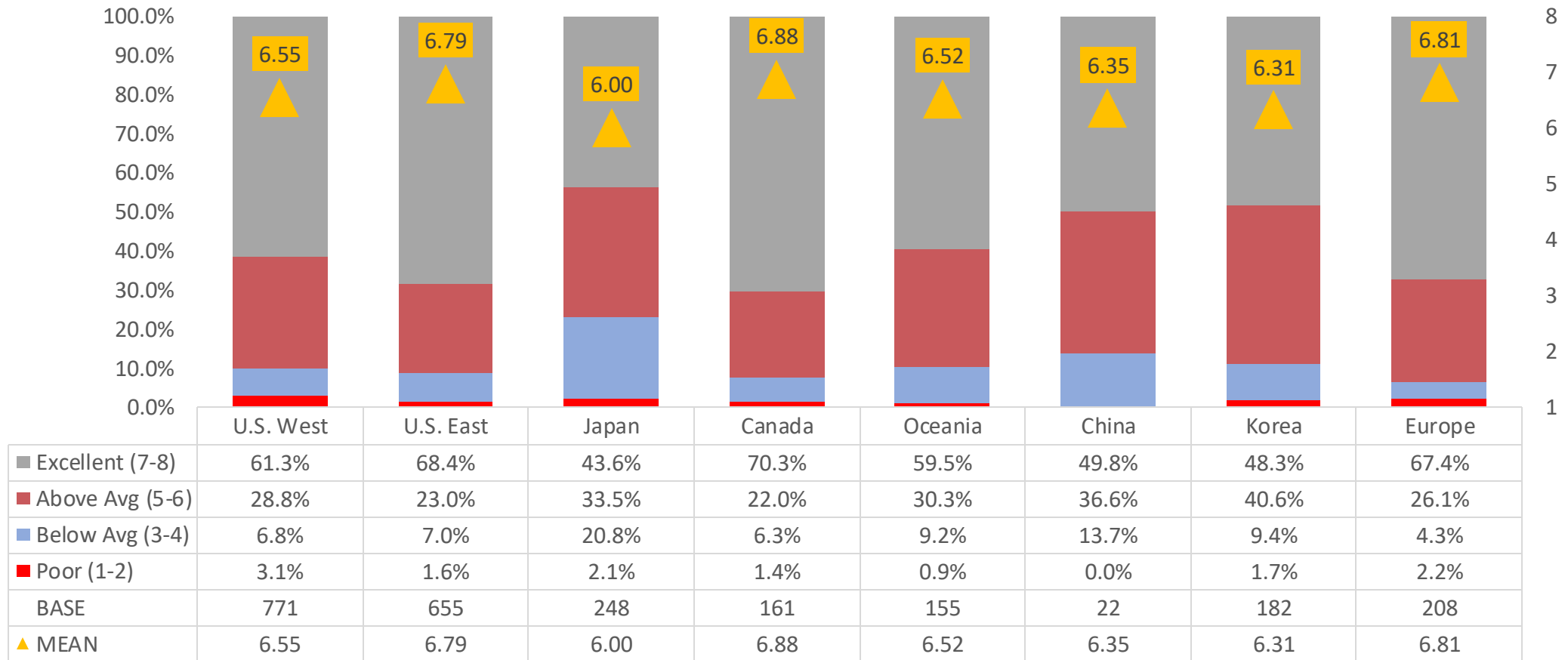
# LODGING/ ACOMMODATIONS - O‘AHU

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



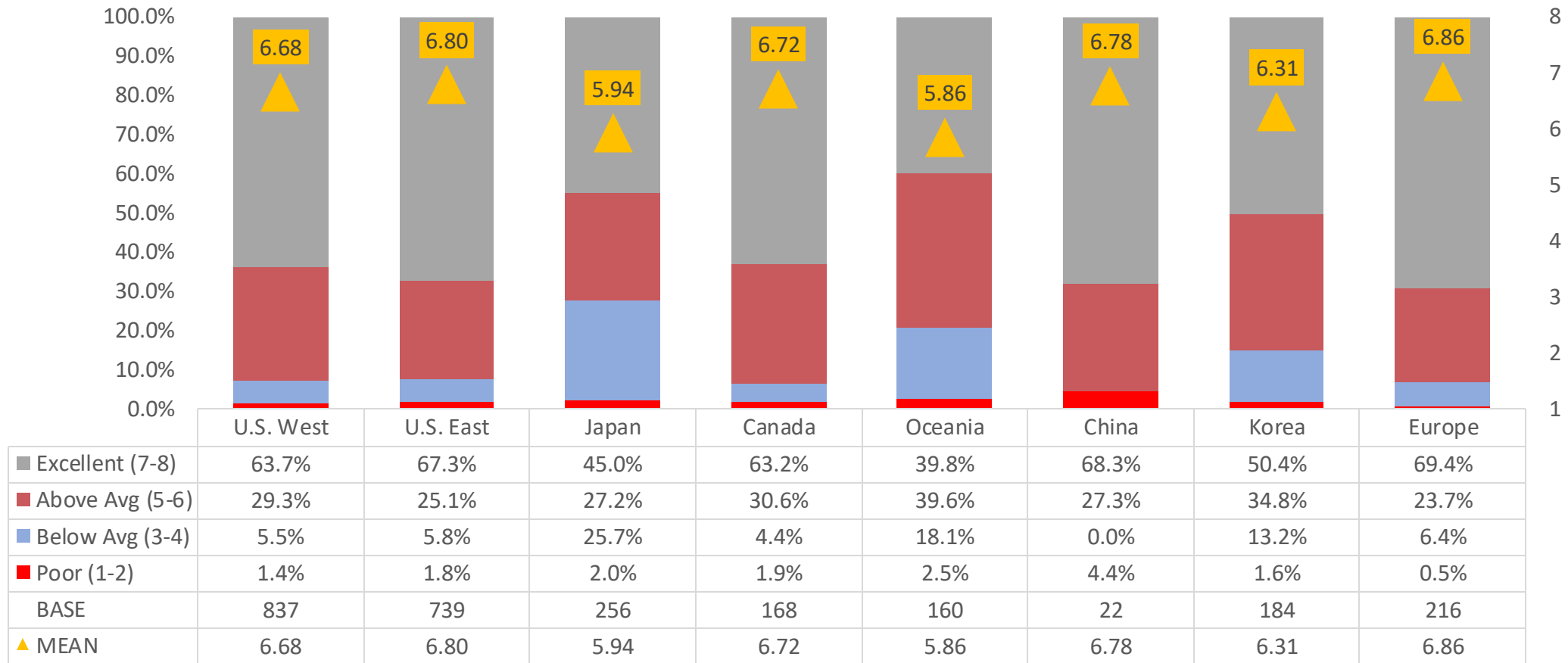
# TRANSPORTATION ON ISLAND - O'AHU

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



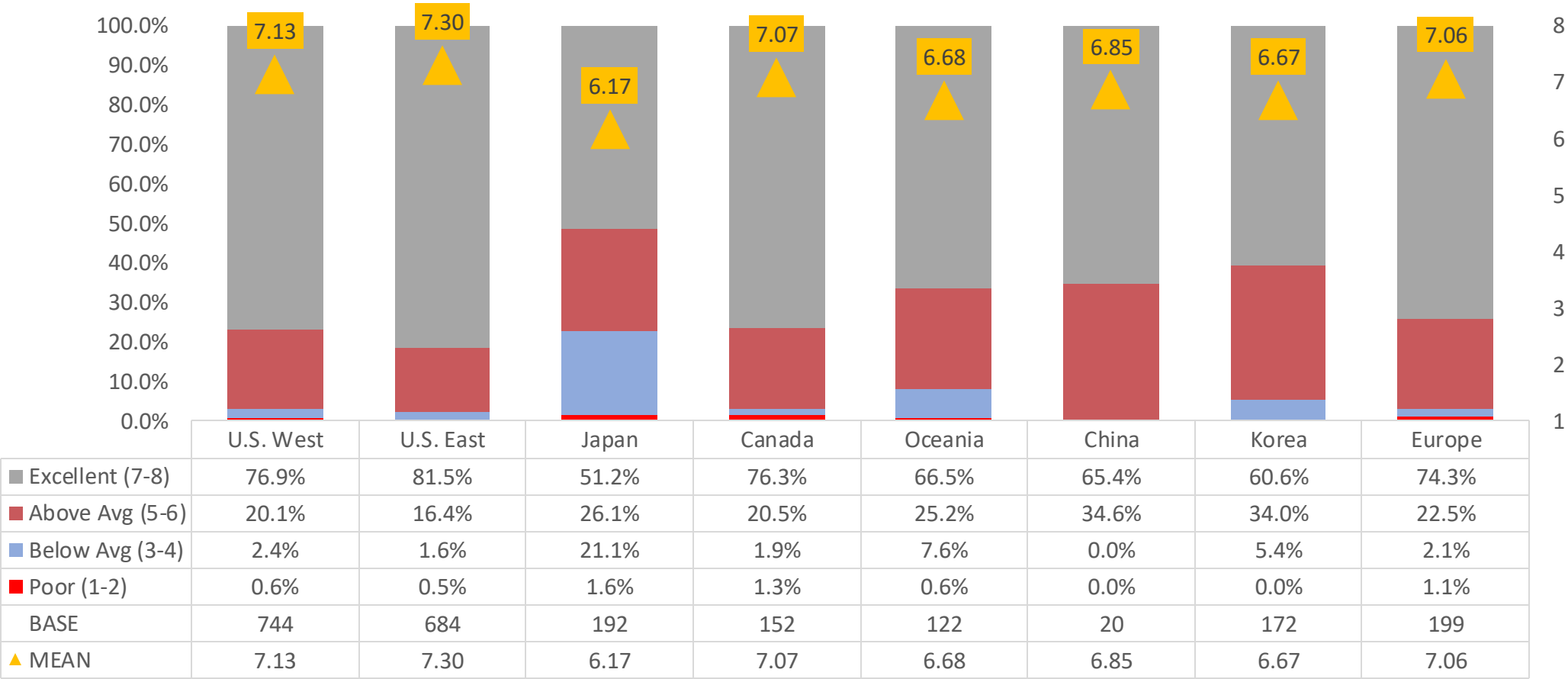
# AIRPORT - O'AHU

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



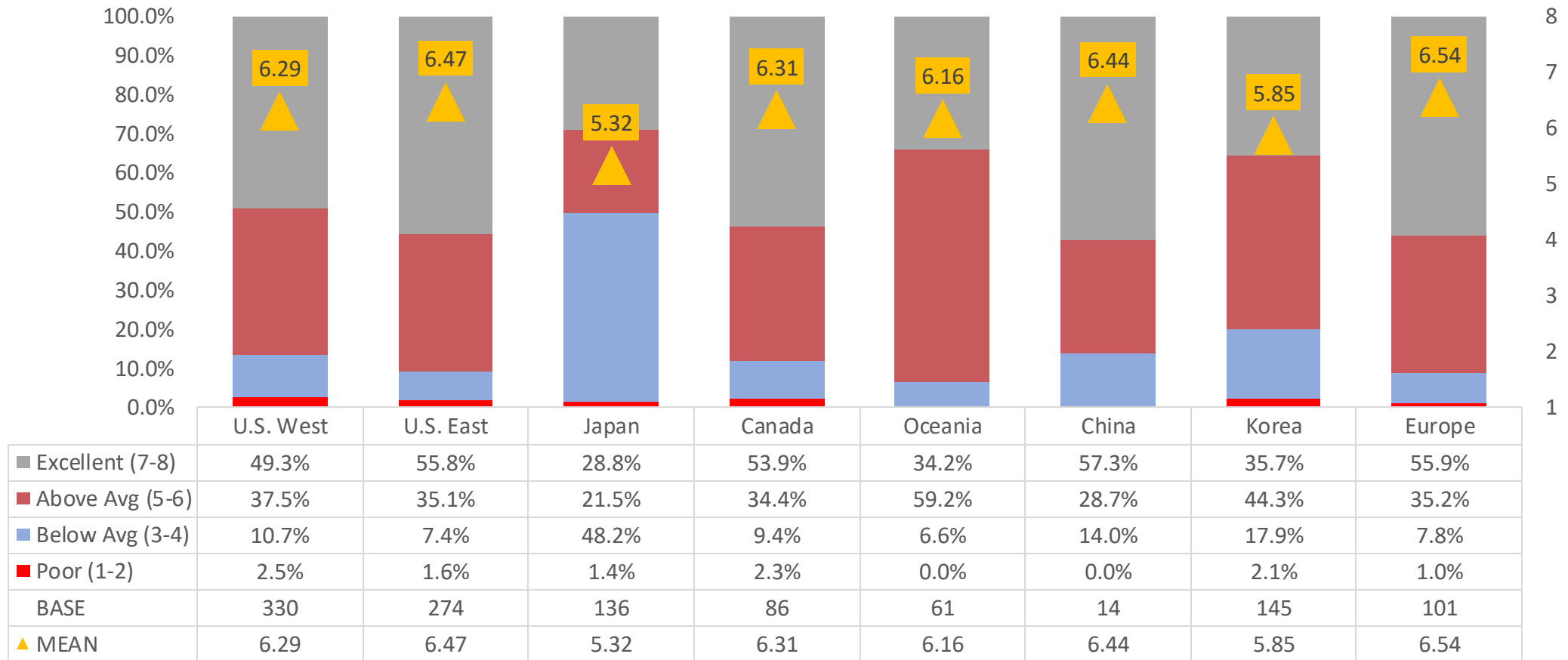
# CULTURAL EXPERIENCES - O'AHU

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



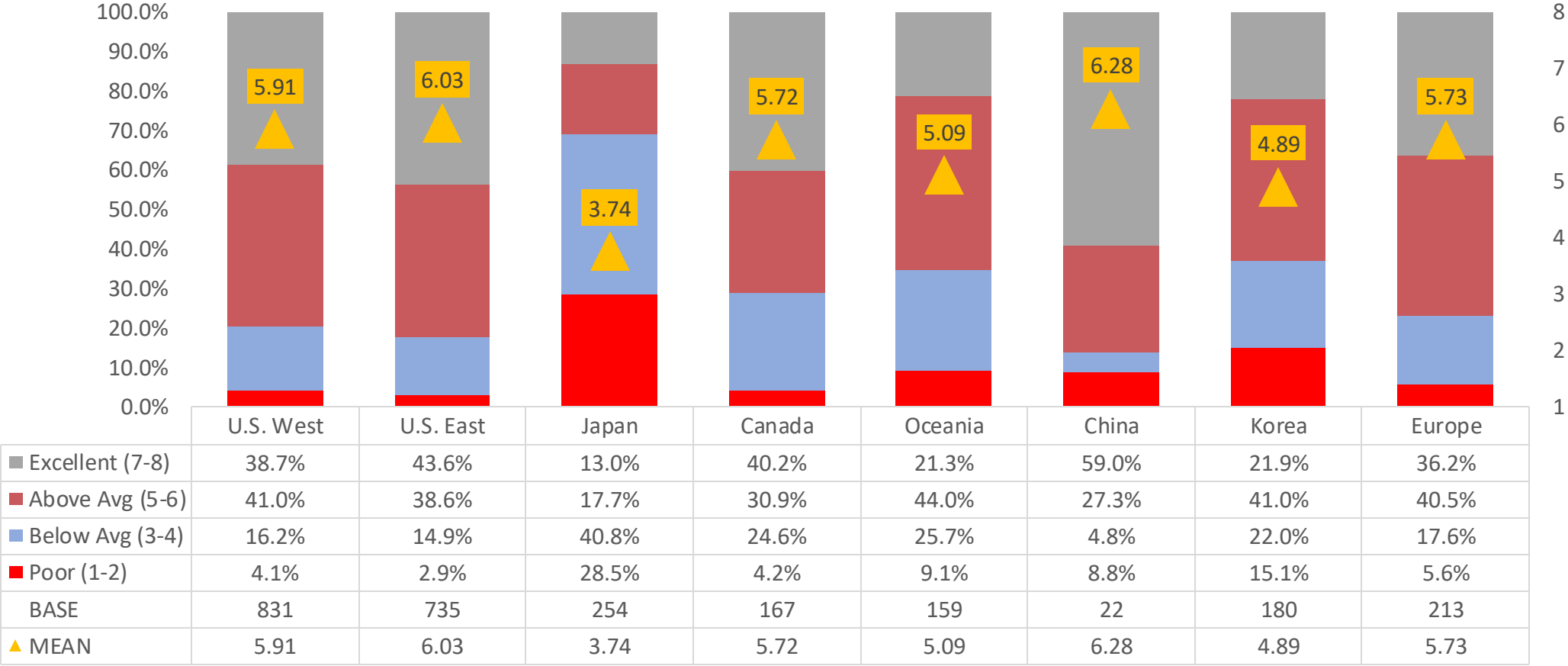
# VOLUNTEER EXPERIENCES - O'AHU

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



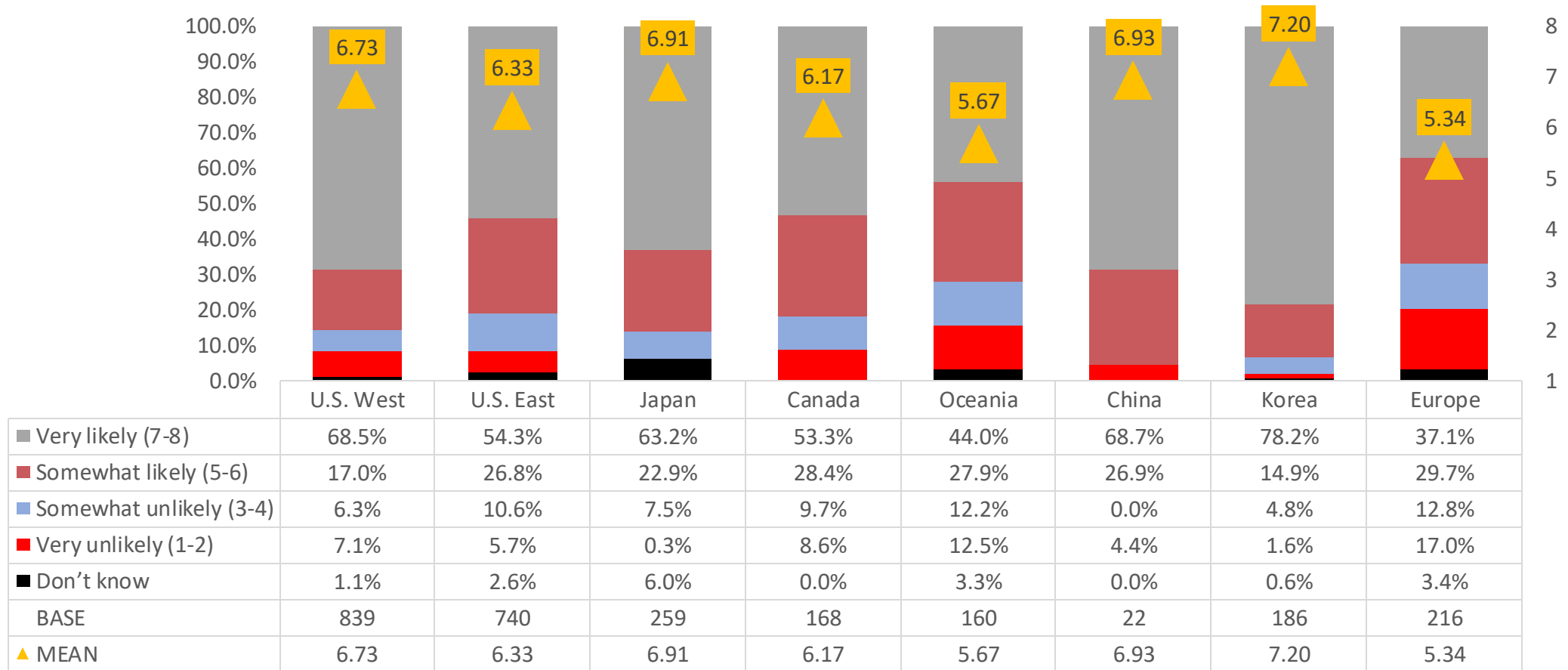
# OVERALL VALUE FOR THE MONEY – O‘AHU

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)

100.0%

80.0%

60.0%

40.0%

20.0%

0.0%

|           | Q3 2018 | Q3 2019 | Q3 2020 | Q3 2021 | Q3 2022 | Q3 2023 | Q3 2024 | Q3 2025 P |
|-----------|---------|---------|---------|---------|---------|---------|---------|-----------|
| U.S. West | 67.3%   | 66.1%   | 75.6%   | 68.8%   | 71.3%   | 72.5%   | 69.0%   | 68.5%     |
| U.S. East | 51.8%   | 52.7%   | 70.8%   | 56.5%   | 52.2%   | 55.5%   | 58.0%   | 54.3%     |
| Japan     | 61.6%   | 63.6%   |         |         | 78.6%   | 64.8%   | 67.5%   | 63.2%     |
| Canada    | 51.2%   | 51.5%   |         |         | 56.5%   | 51.4%   | 57.3%   | 53.3%     |
| Oceania   | 53.5%   | 54.0%   |         |         | 57.6%   | 51.2%   | 45.2%   | 44.0%     |
| Korea     | 59.9%   | 62.1%   |         |         | 69.2%   | 72.2%   | 66.1%   | 78.2%     |
| China     | 53.5%   | 53.2%   |         |         | 49.8%   | 76.4%   | 73.3%   | 68.7%     |
| Europe    | 39.7%   | 39.8%   |         |         |         |         | 40.1%   | 37.1%     |

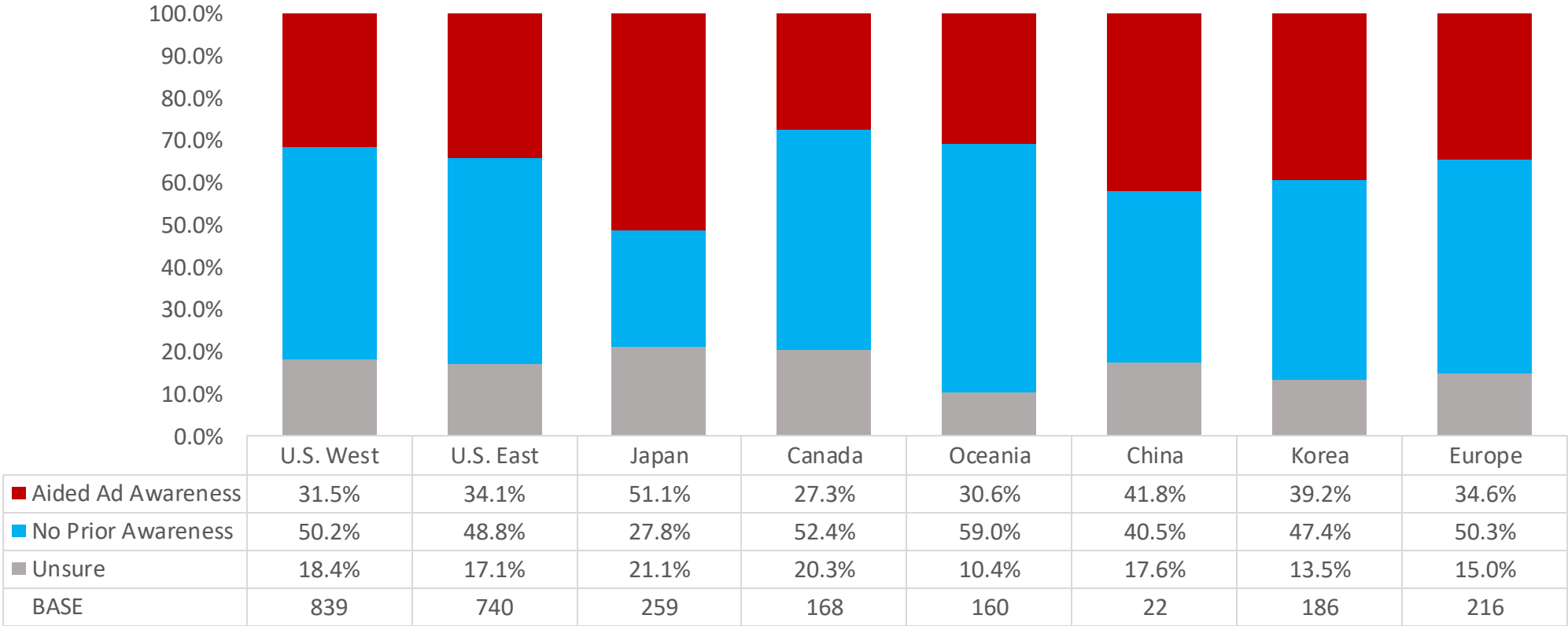
P= Preliminary Data

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.



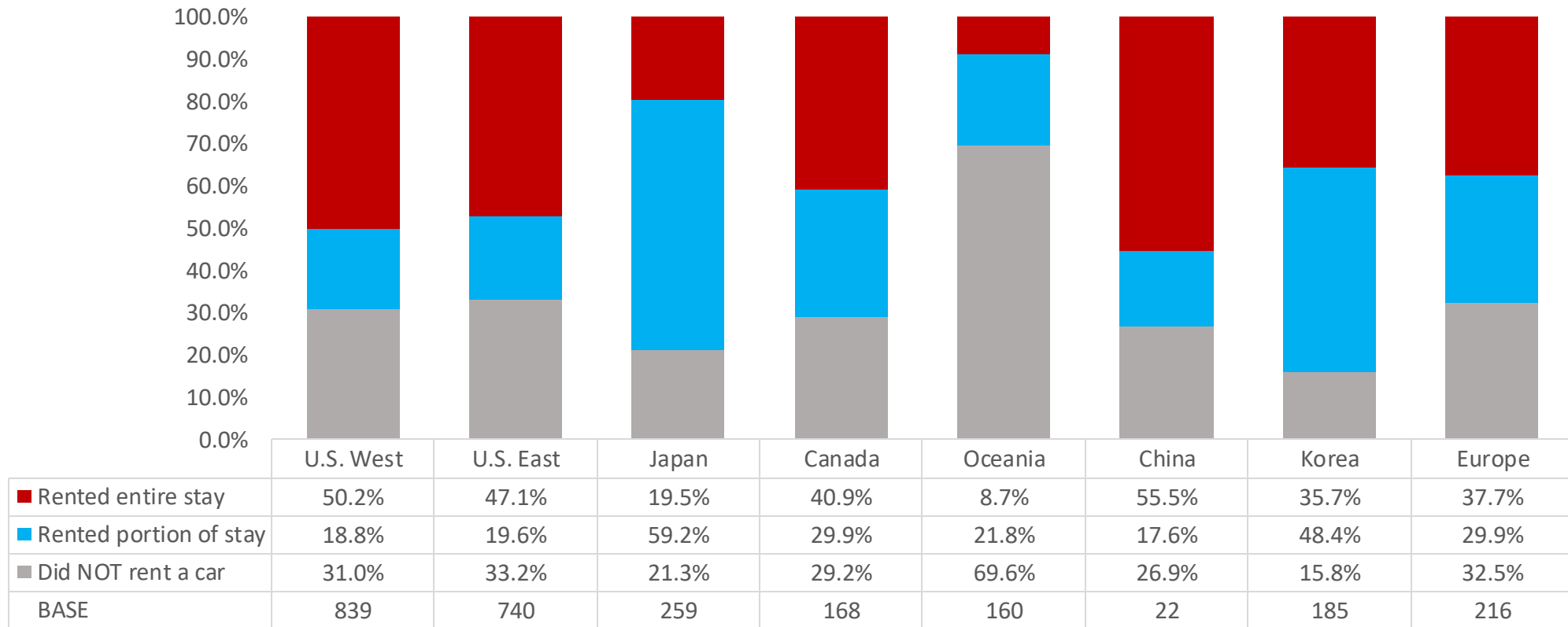
# AIDED ADVERTISING AWARENESS - O'AHU



# MOTIVATING FACTORS – O‘AHU

|  | U.S. West | U.S. East | Japan | Canada | Oceania | China | Korea | Europe |
|--|-----------|-----------|-------|--------|---------|-------|-------|--------|
| Television programs or movies filmed in Hawai‘i                        | 12.1%     | 15.8%     | 45.7% | 28.4%  | 23.7%   | 9.3%  | 23.2% | 39.7%  |
| Hawaiian music   | 12.2%     | 14.6%     | 19.1% | 14.3%  | 9.0%    | 4.4%  | 6.6%  | 16.1%  |
| Social media posts and videos  | 21.6%     | 19.7%     | 39.9% | 33.0%  | 14.6%   | 13.7% | 31.1% | 30.6%  |
| Outdoor or sporting activities and events                              | 13.7%     | 11.3%     | 9.7%  | 17.7%  | 8.1%    | 4.4%  | 13.0% | 13.0%  |
| Hawaiian cultural experience and Hawaiian cultural events              | 23.0%     | 28.9%     | 17.5% | 32.8%  | 15.7%   | 26.9% | 10.9% | 29.2%  |
| Famous landmarks or imagery/ natural beauty (beaches, mountains, etc.) | 43.0%     | 49.0%     | 37.3% | 59.8%  | 50.3%   | 86.3% | 51.6% | 60.6%  |
| Attend a festival or other event                                       | 7.5%      | 5.9%      | 6.3%  | 1.9%   | 2.4%    | 8.8%  | 4.3%  | 1.8%   |
| BASE   | 839       | 740       | 259   | 168    | 160     | 22    | 186   | 216    |

# CAR RENTAL - O'AHU

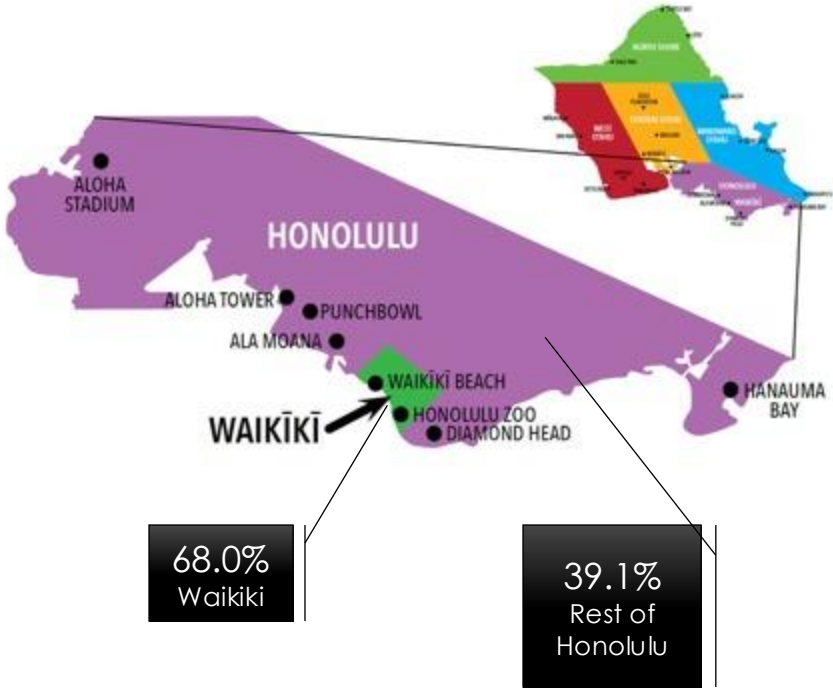
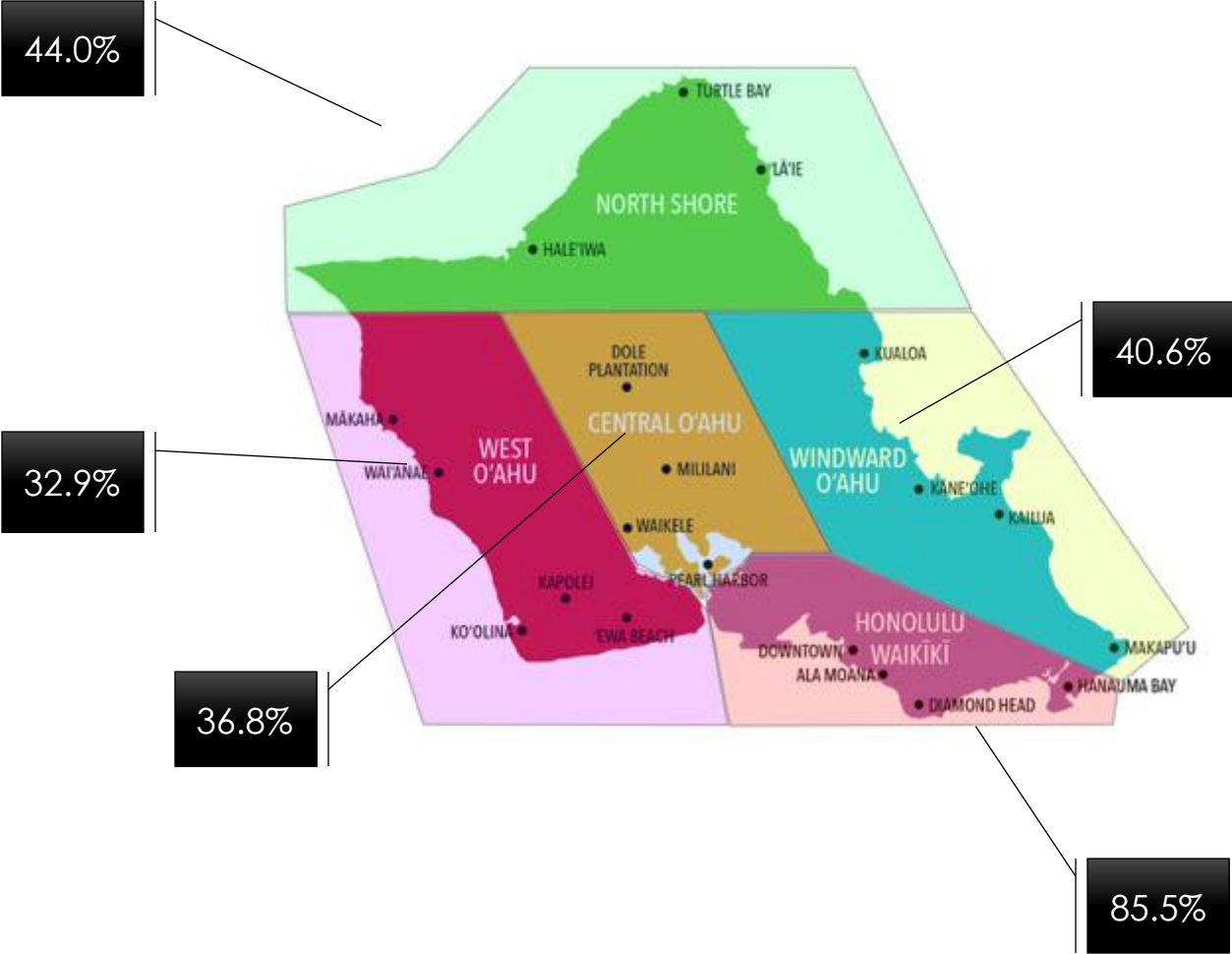


# REASONS FOR PARTIAL RENTAL CAR – O‘AHU

|  | U.S. West | U.S. East | Japan | Canada | Oceania | China  | Korea | Europe |
|--|-----------|-----------|-------|--------|---------|--------|-------|--------|
| I only needed a vehicle on certain dates       | 72.1%     | 78.2%     | 83.5% | 67.2%  | 71.2%   | 100.0% | 64.4% | 70.9%  |
| Parking was too expensive at my hotel/ lodging | 42.6%     | 38.3%     | 9.4%  | 55.4%  | 22.6%   | 50.0%  | 36.6% | 39.6%  |
| Car rental rates were too expensive            | 29.0%     | 28.0%     | 16.5% | 31.1%  | 18.5%   | 50.0%  | 28.7% | 23.2%  |
| Wanted to reduce my carbon footprint           | 7.7%      | 10.0%     | 0.7%  | 9.0%   | 4.1%    | 0.0%   | 12.2% | 10.8%  |
| BASE   | 157       | 144       | 154   | 49     | 42      | 4      | 90    | 64     |

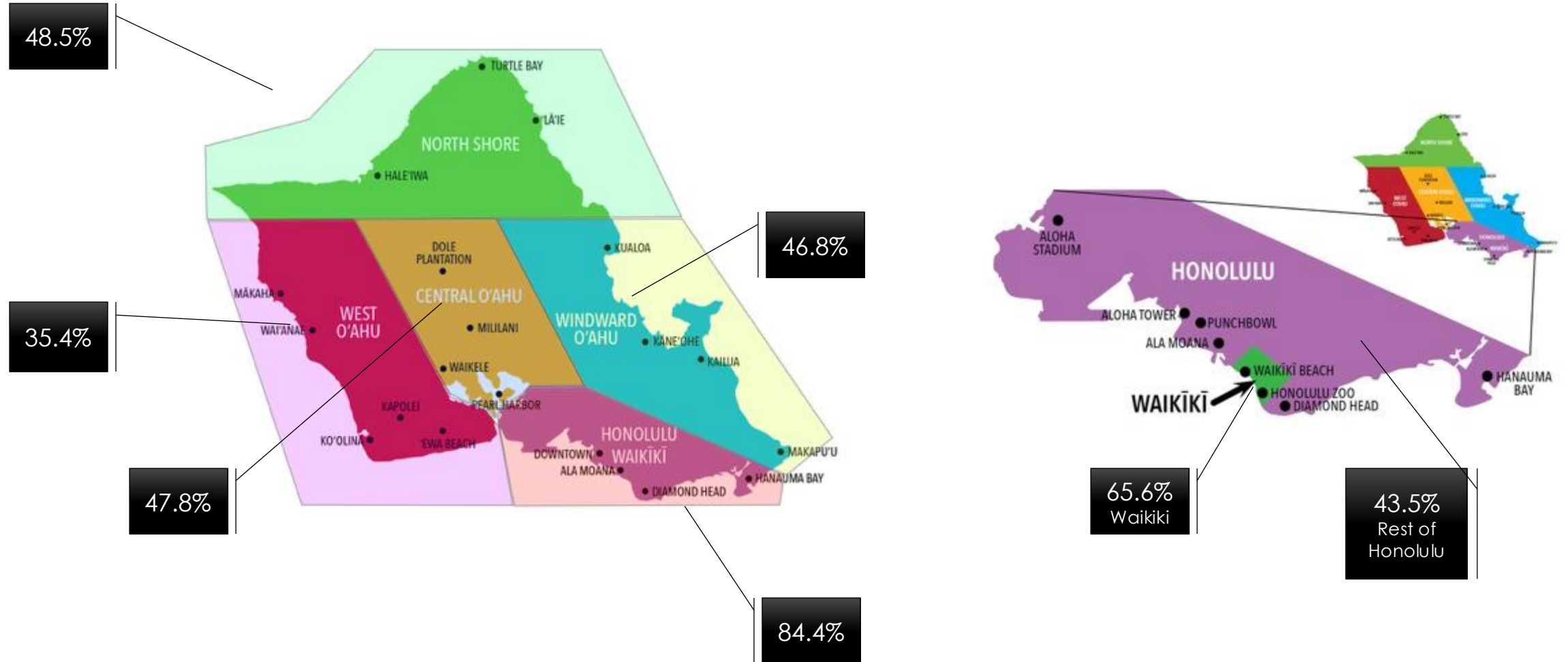
# AREAS VISITED - O'AHU

## U.S. WEST



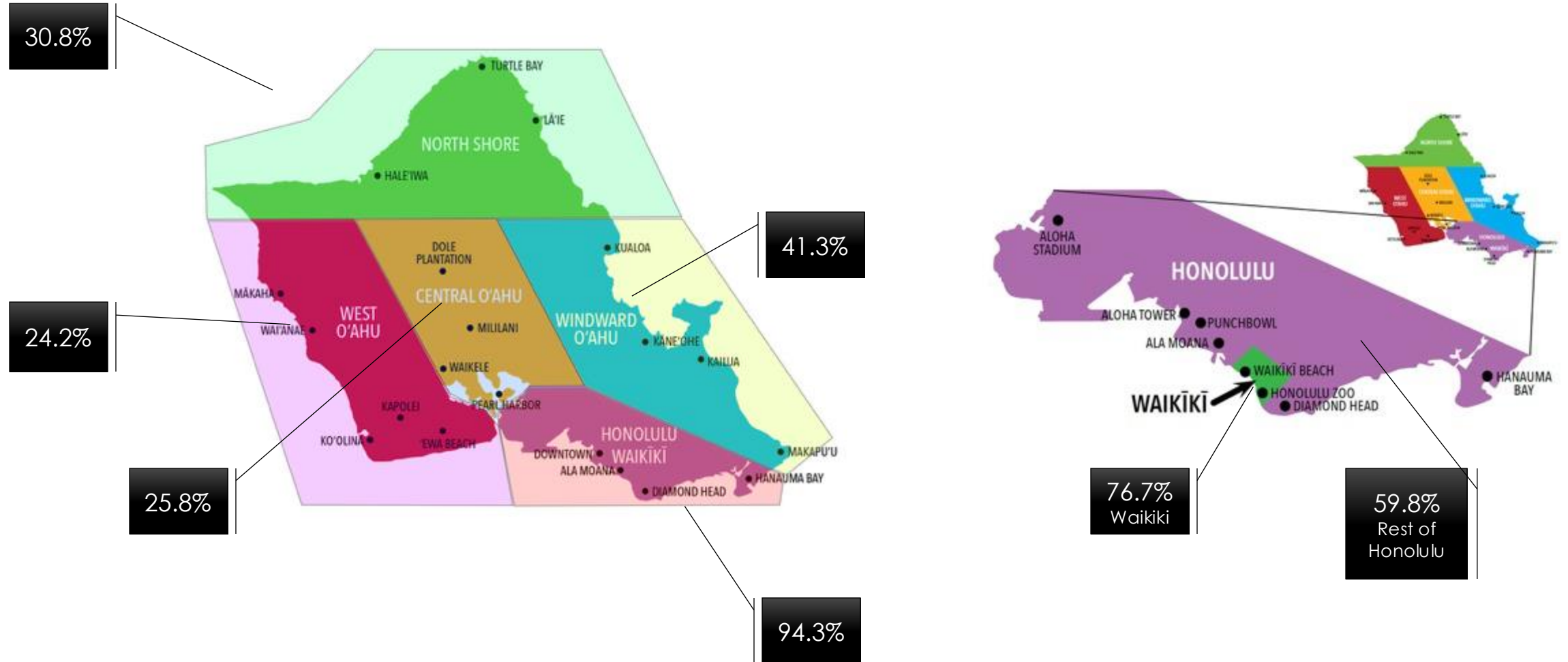
# AREAS VISITED - O'AHU

## U.S. EAST

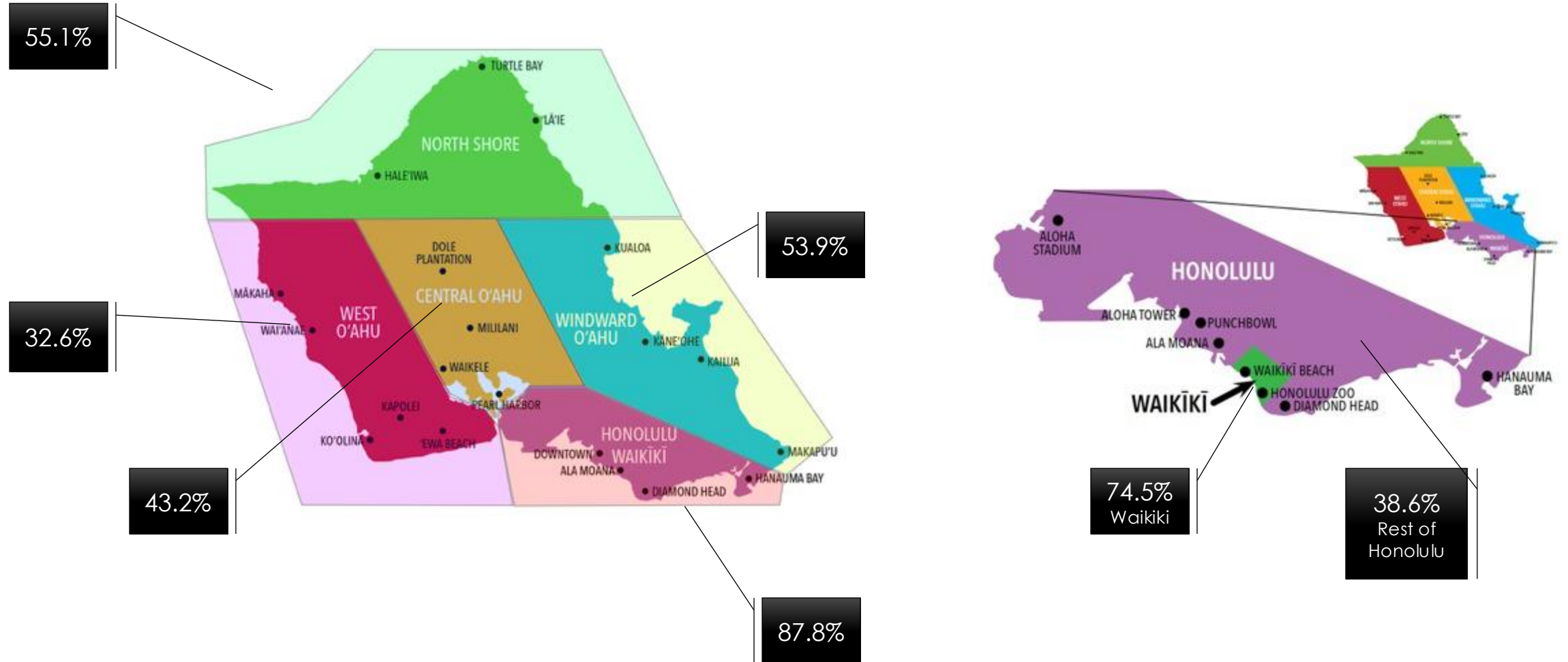


# AREAS VISITED - O'AHU

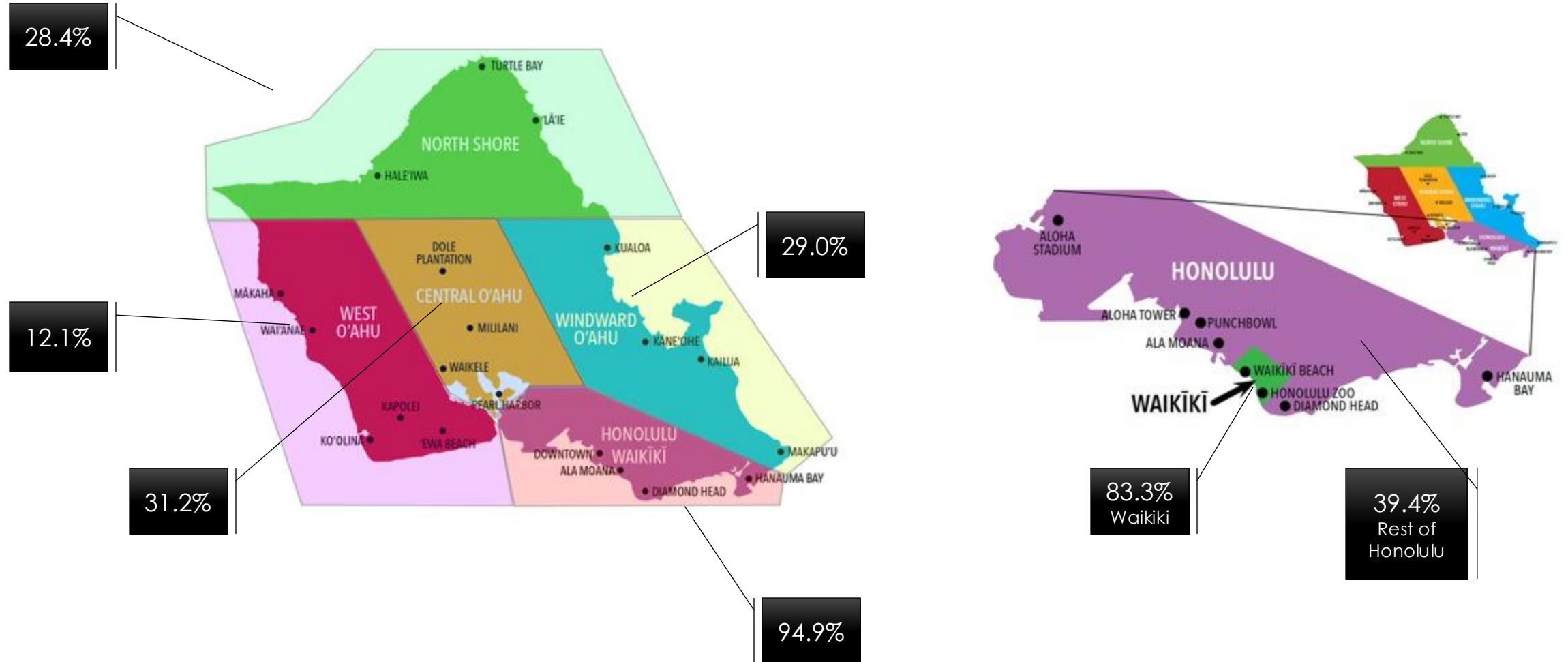
## JAPAN



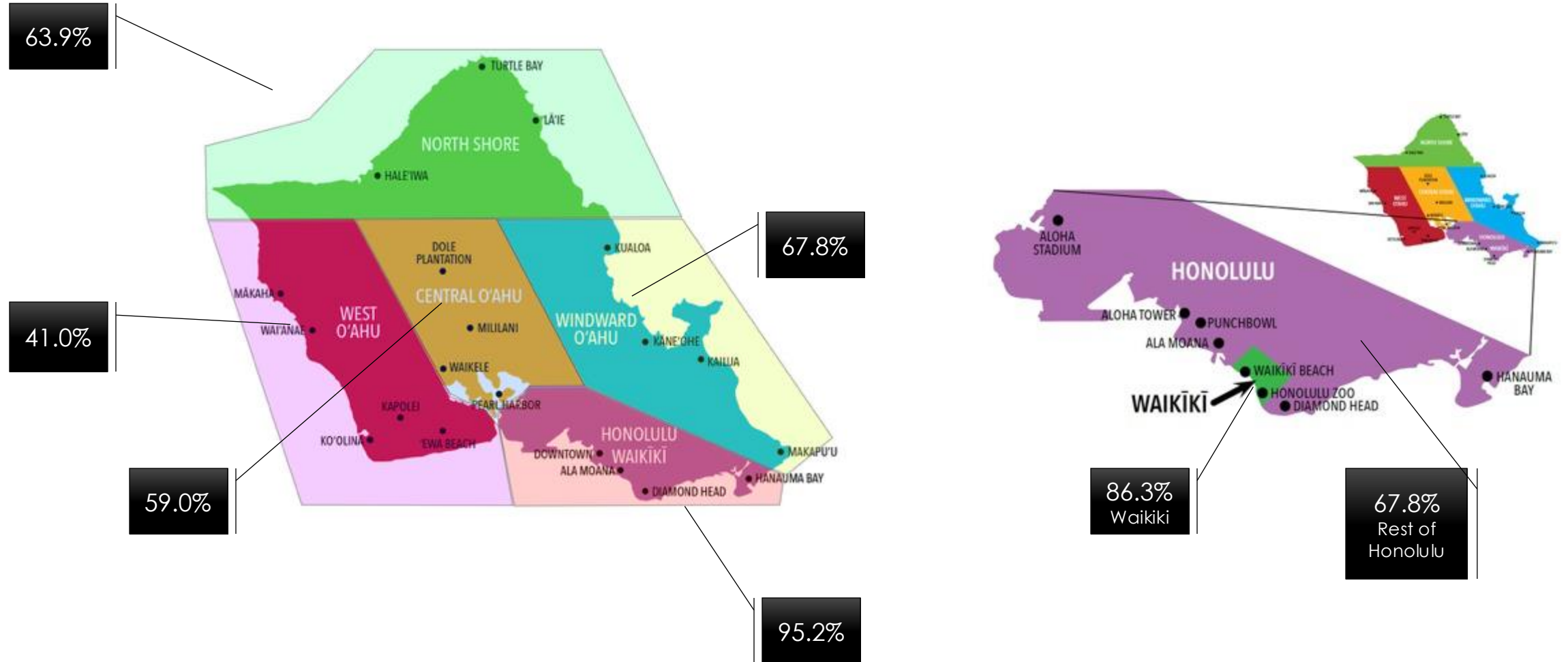
# AREAS VISITED - O'AHU CANADA



# AREAS VISITED - O'AHU OCEANIA



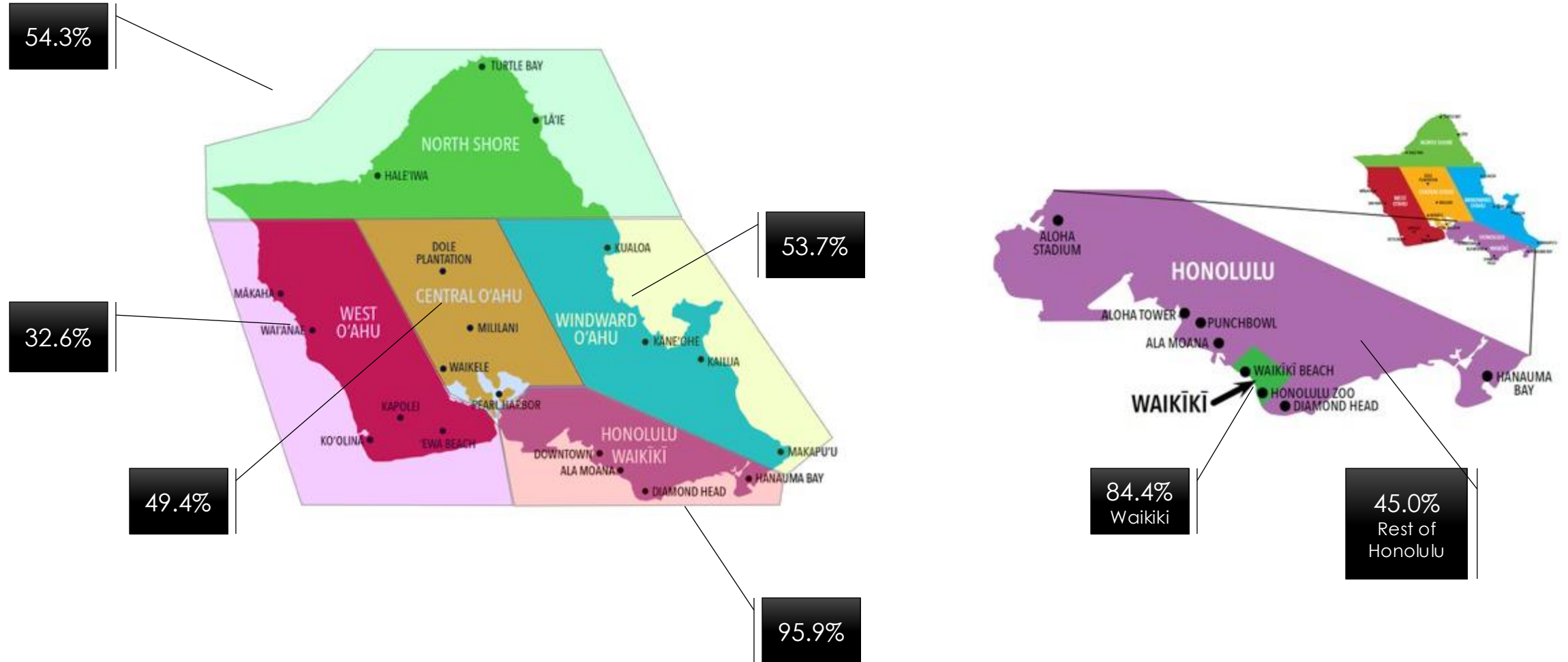
# AREAS VISITED - O'AHU CHINA





# AREAS VISITED - O'AHU

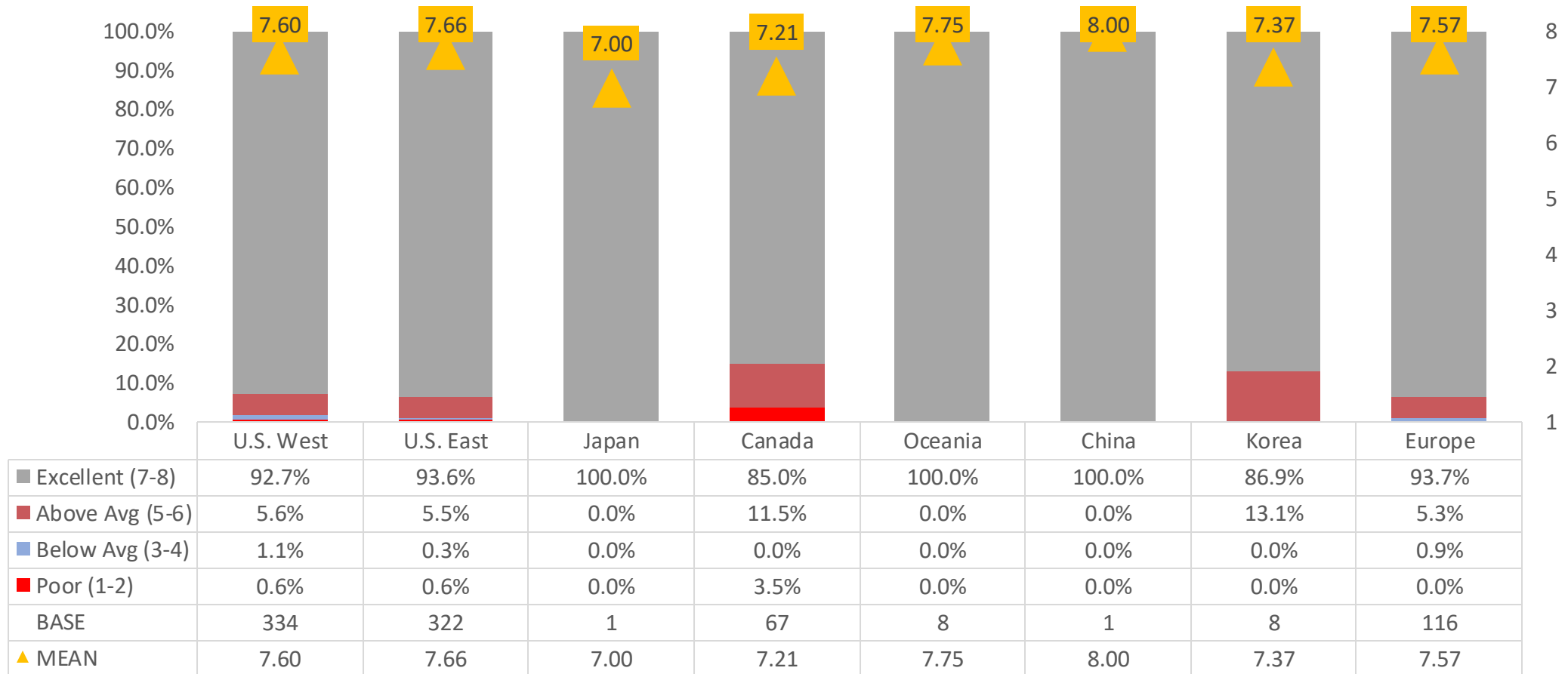
## EUROPE



# Section 8 – Kauaʻi

# SATISFACTION – KAUAI

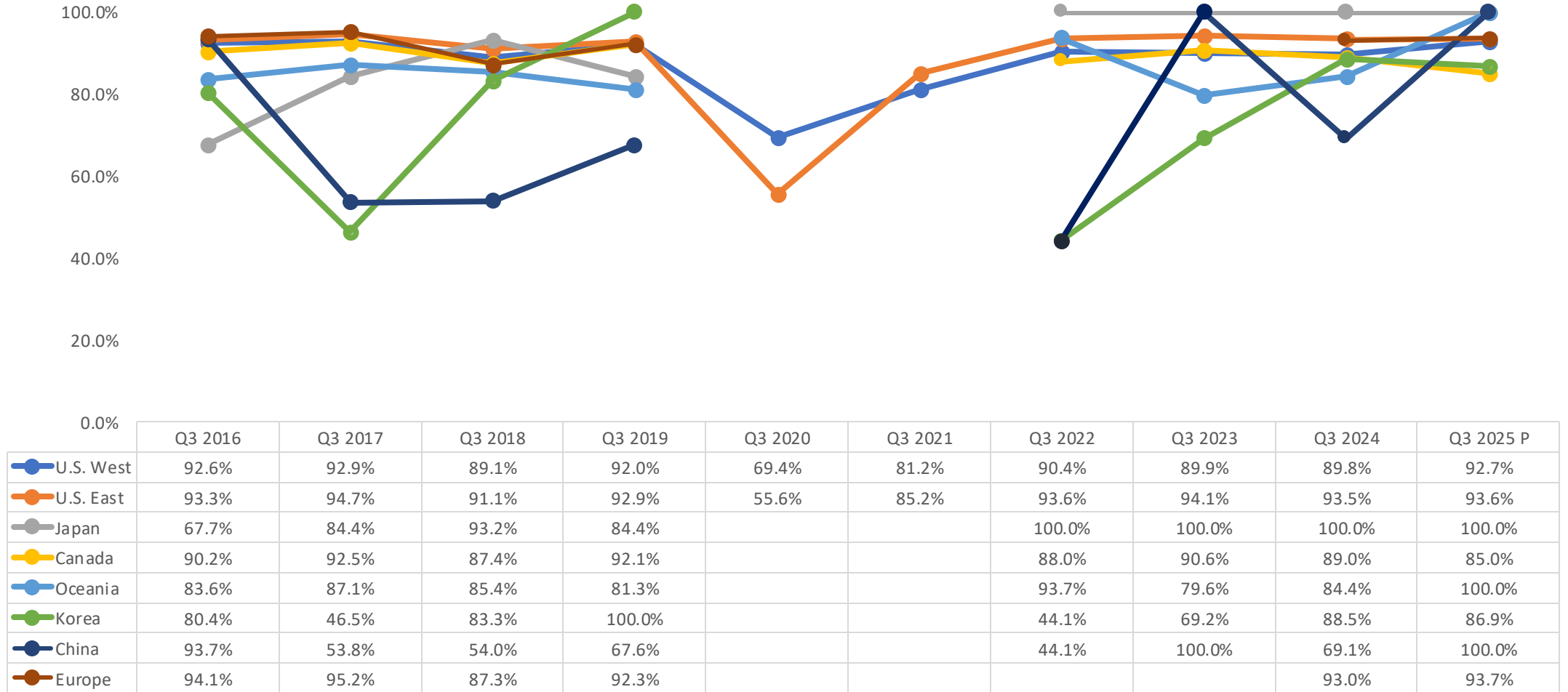
8-pt Rating Scale  
8 = Excellent / 1 = Poor



# SATISFACTION – KAUAI

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

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



P= Preliminary Data

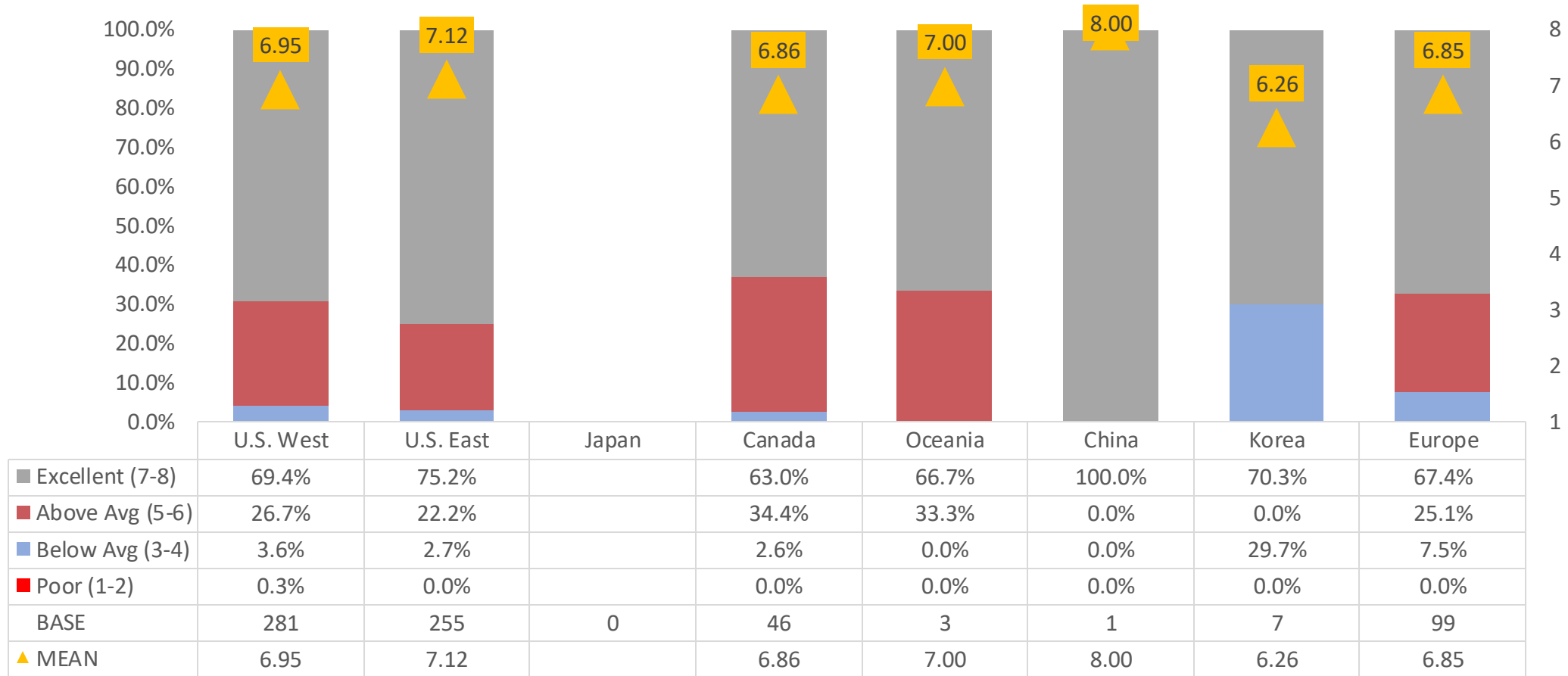
Q. How would you rate your most recent trip to the state of Hawai'i? How would you rate your experience on\_\_\_?

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. 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.



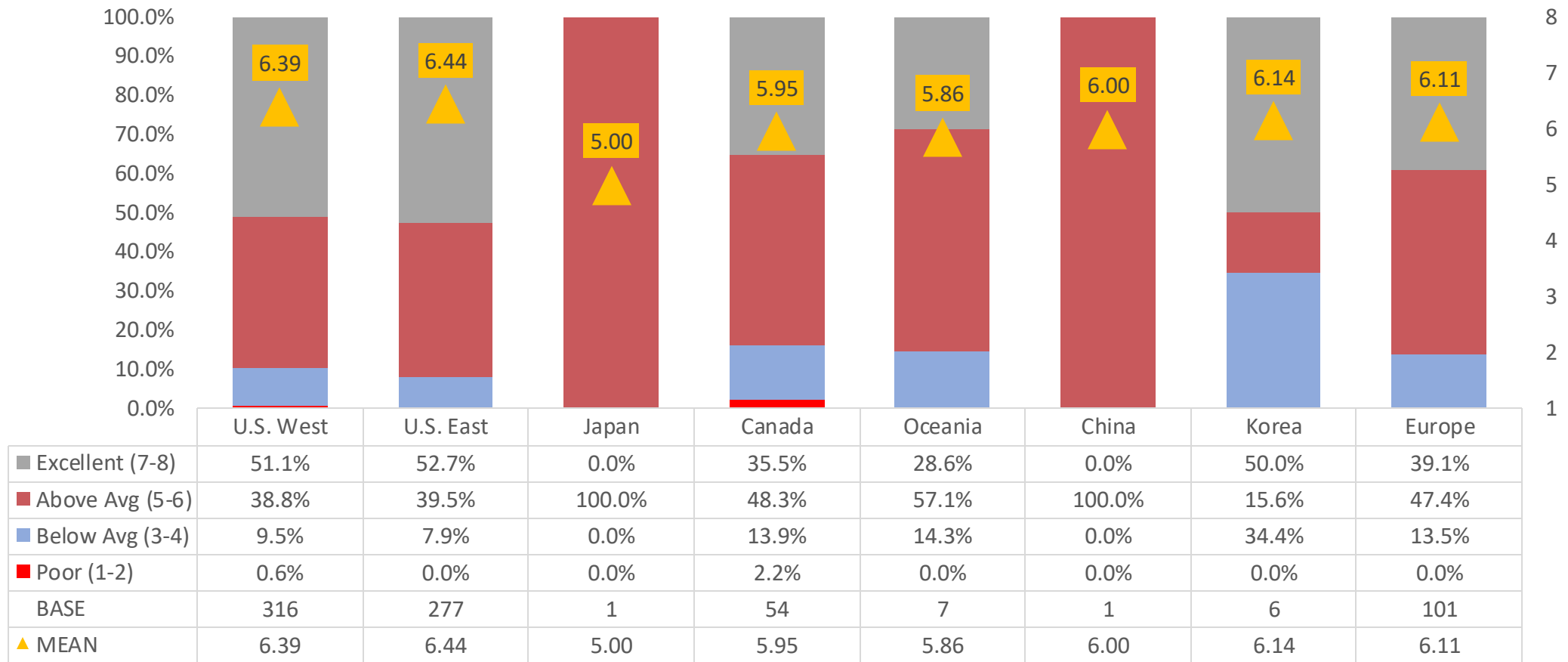
# ENTERTAINMENT/ ATTRACTIONS – KAUA‘I

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



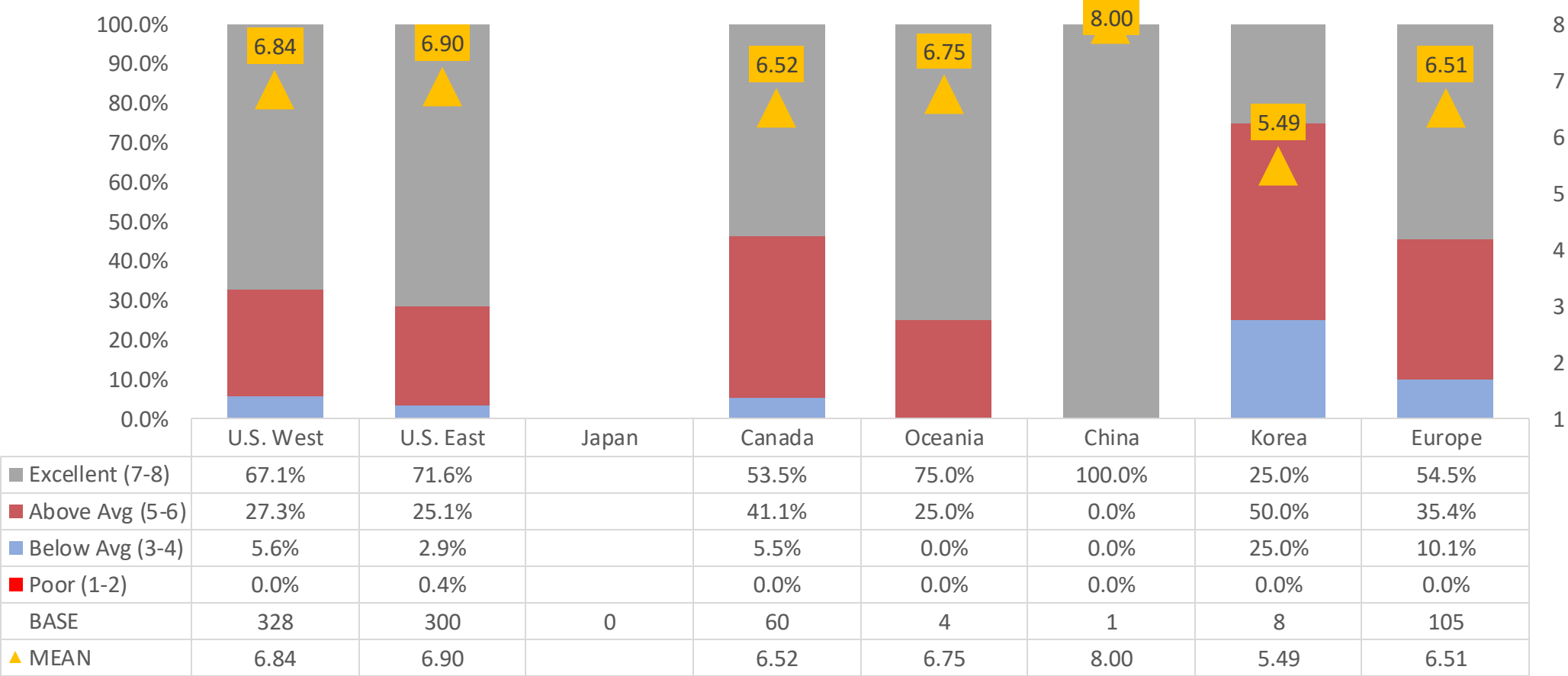
# SHOPPING - KAUA'I

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



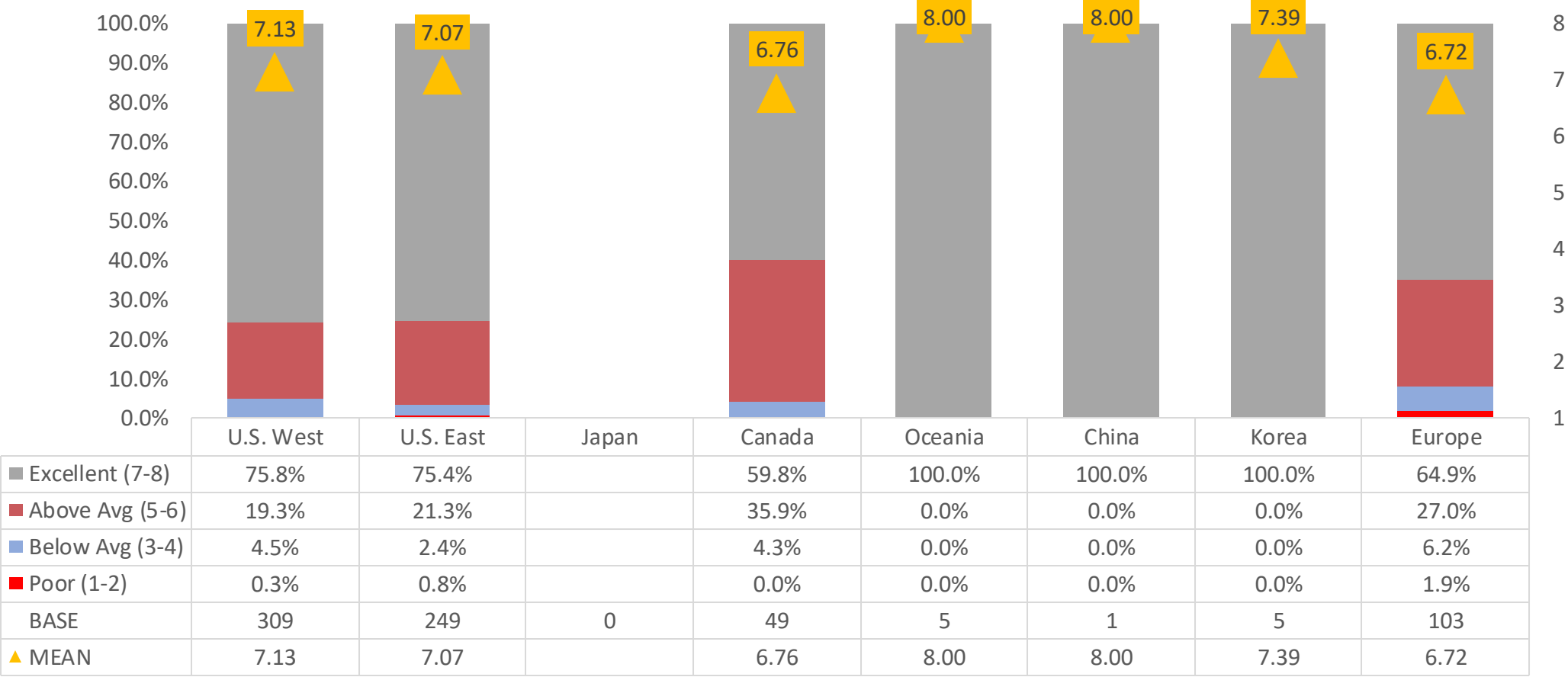
# DINING/ FOOD & BEVERAGE – KAUA‘I

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



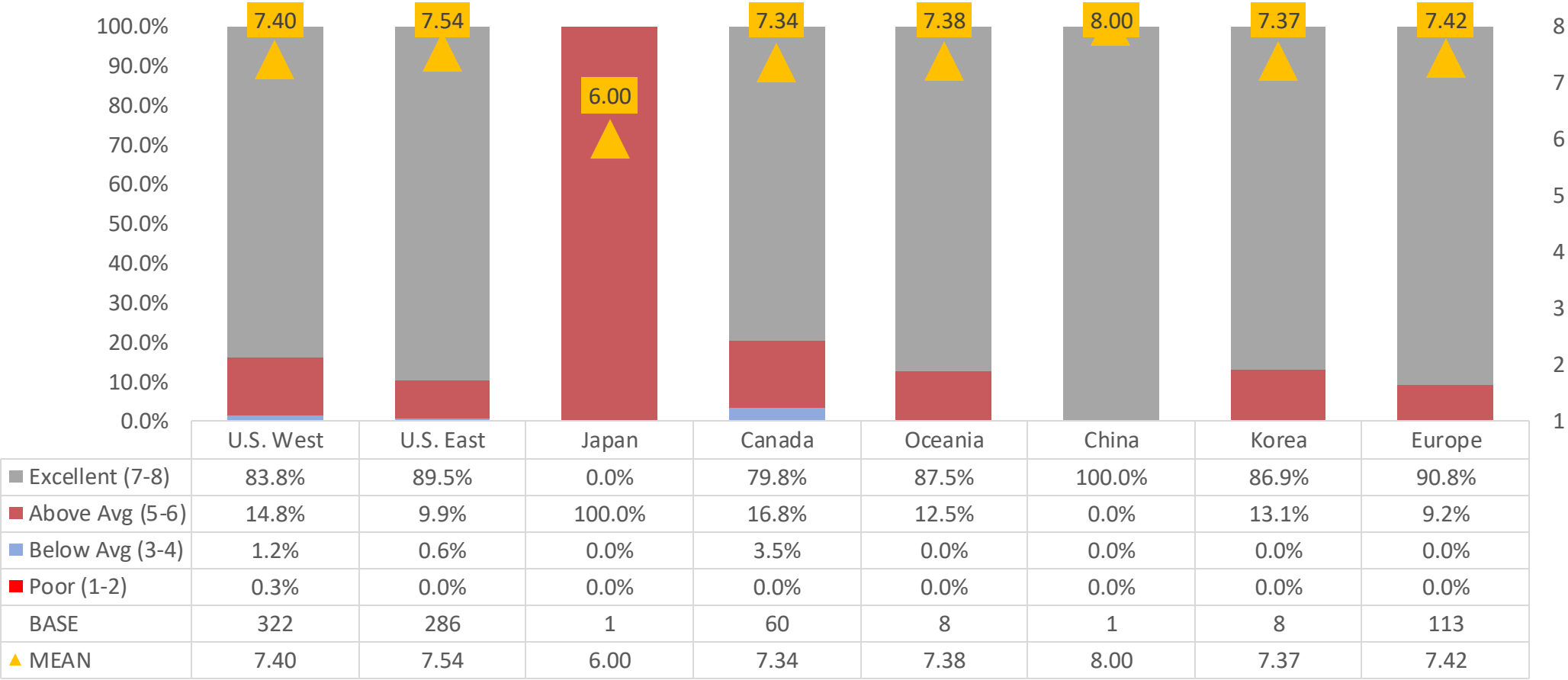
# LODGING/ ACCOMMODATIONS – KAUA‘I

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



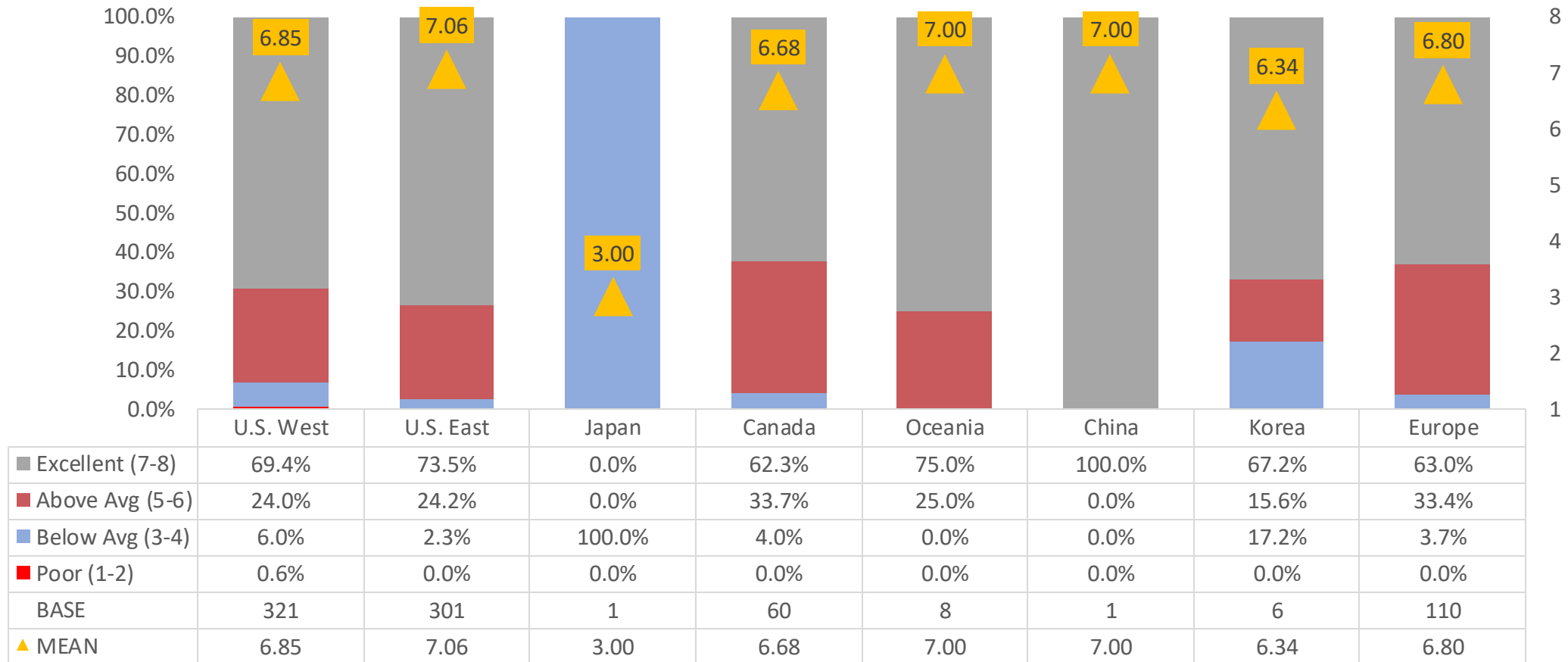
# BEACHES - KAUA'I

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



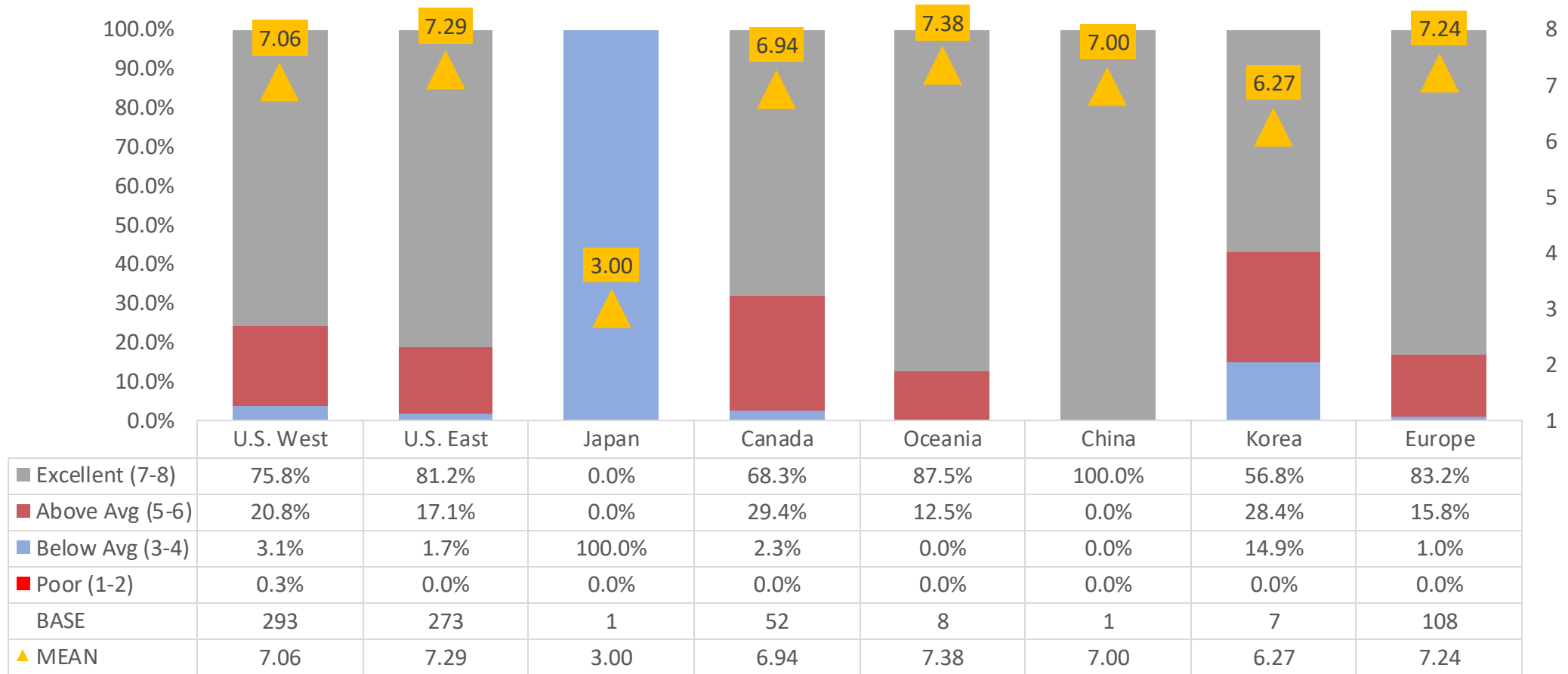
# PUBLIC AREAS - KAUA'I

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



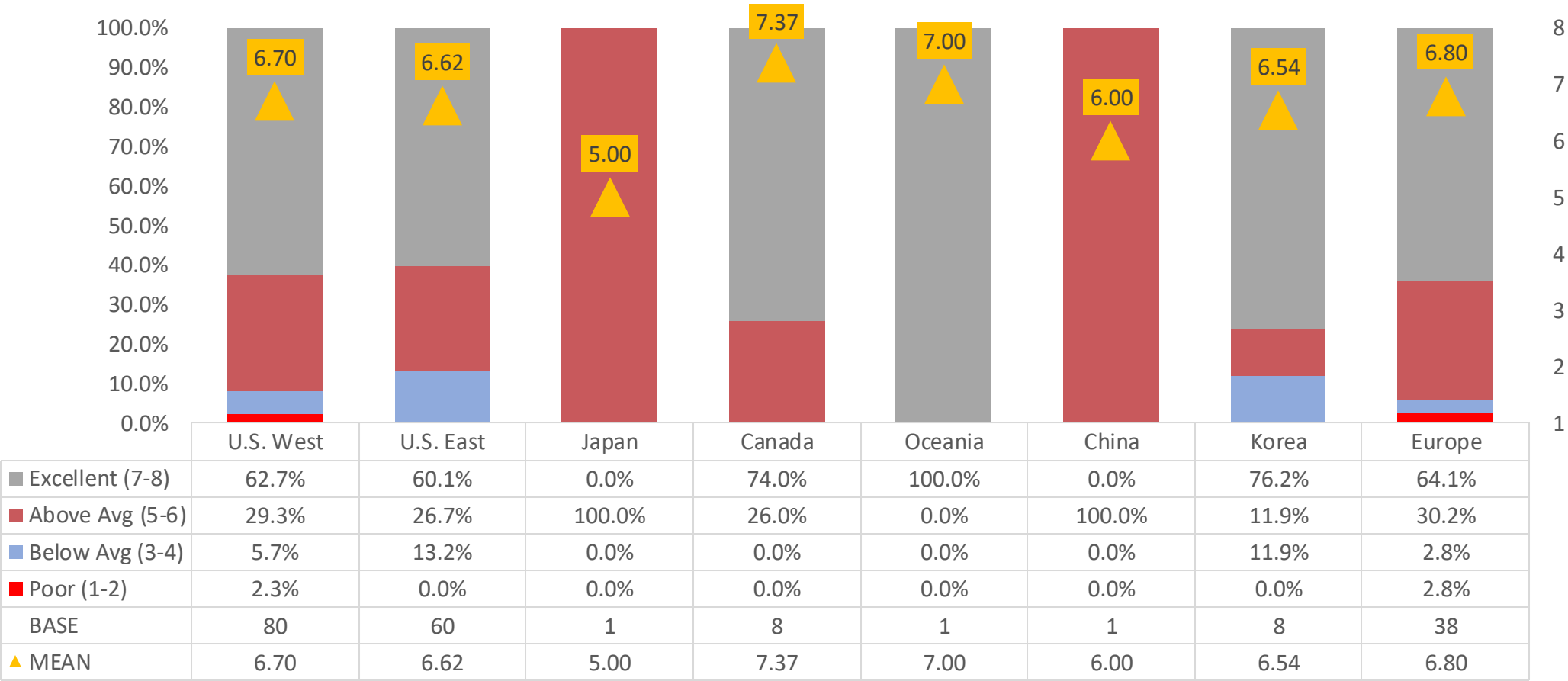
# PARKS - KAUAI

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



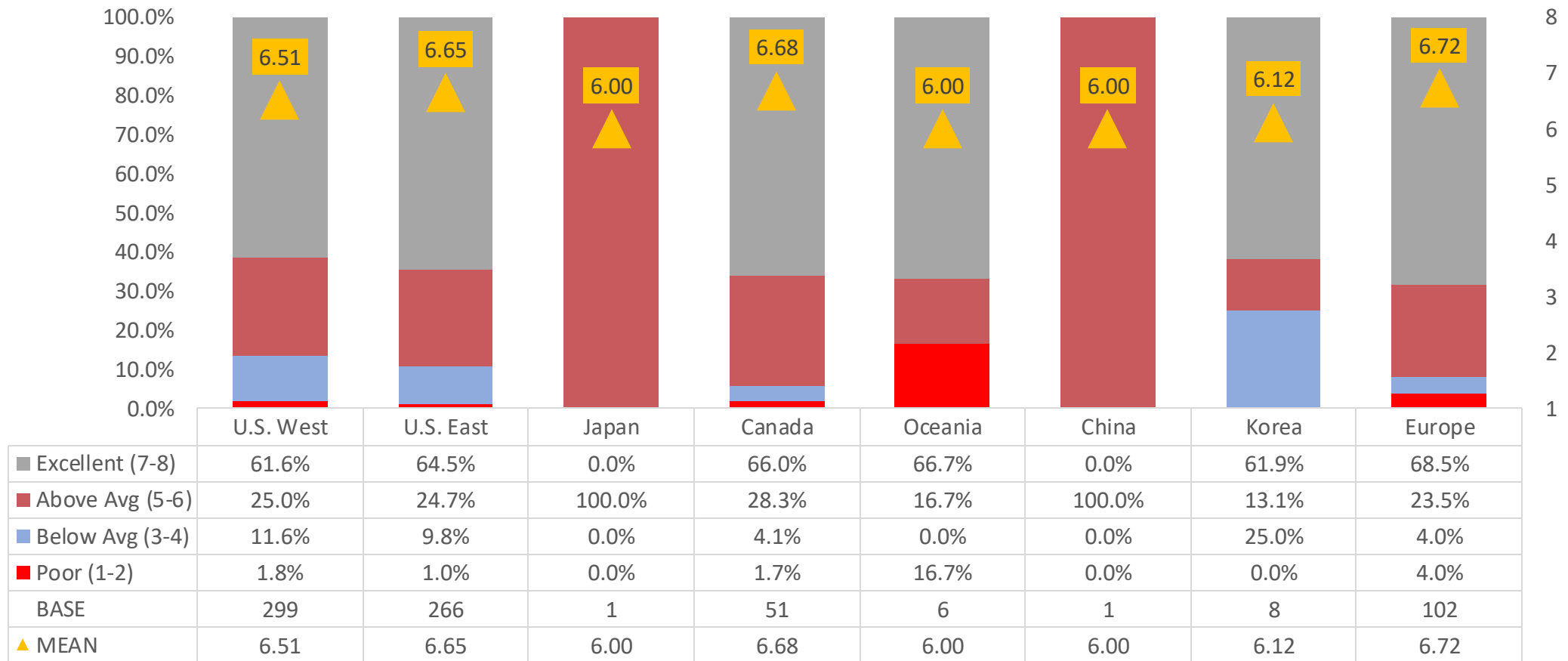
# ROADS – KAUA‘I

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



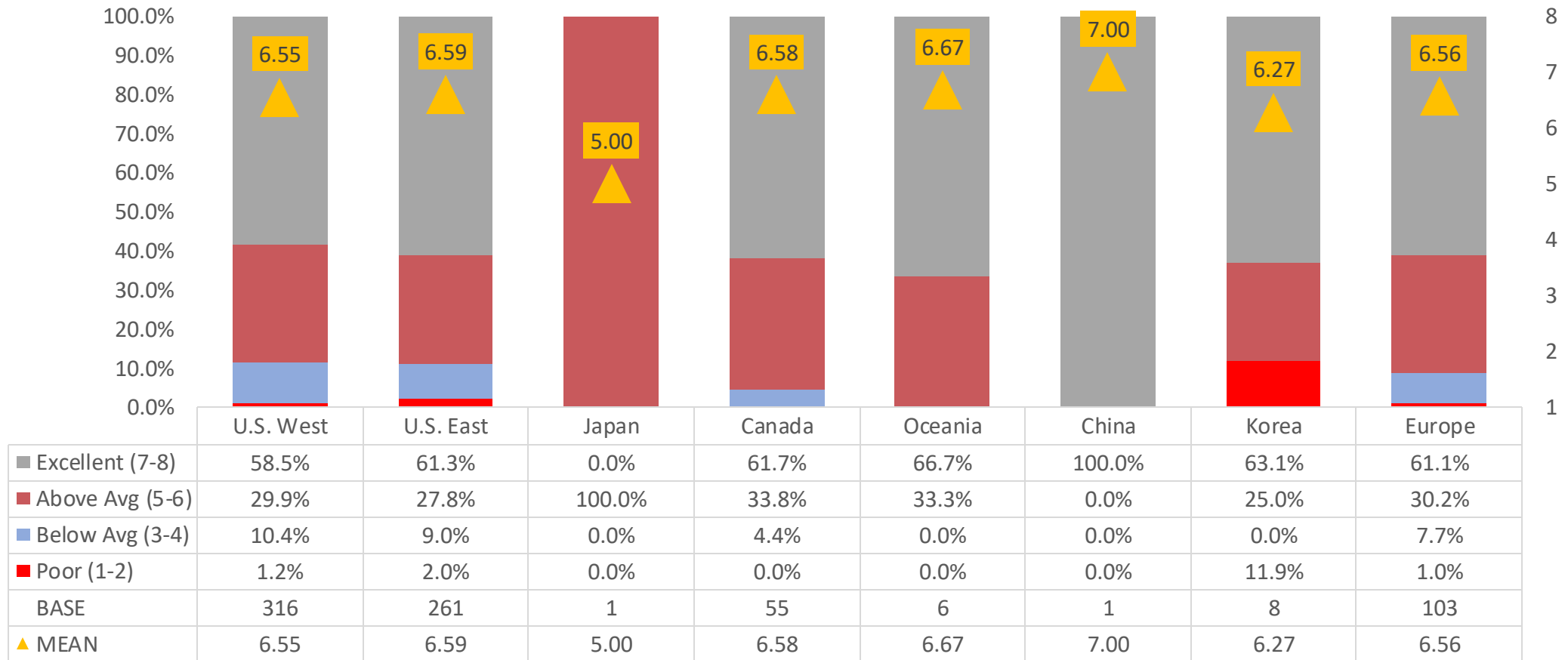
# TRANSPORTATION ON ISLAND - KAUA'I

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



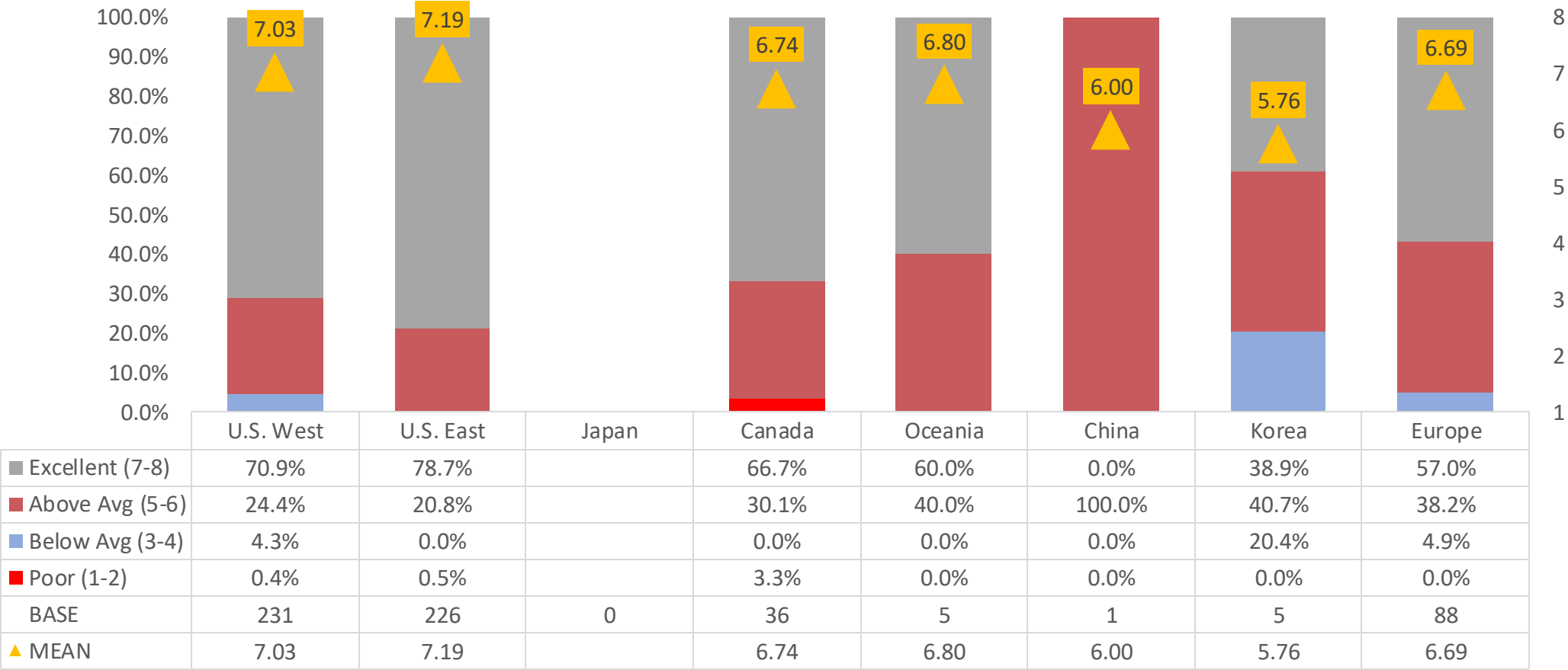
# AIRPORT - KAUA'I

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



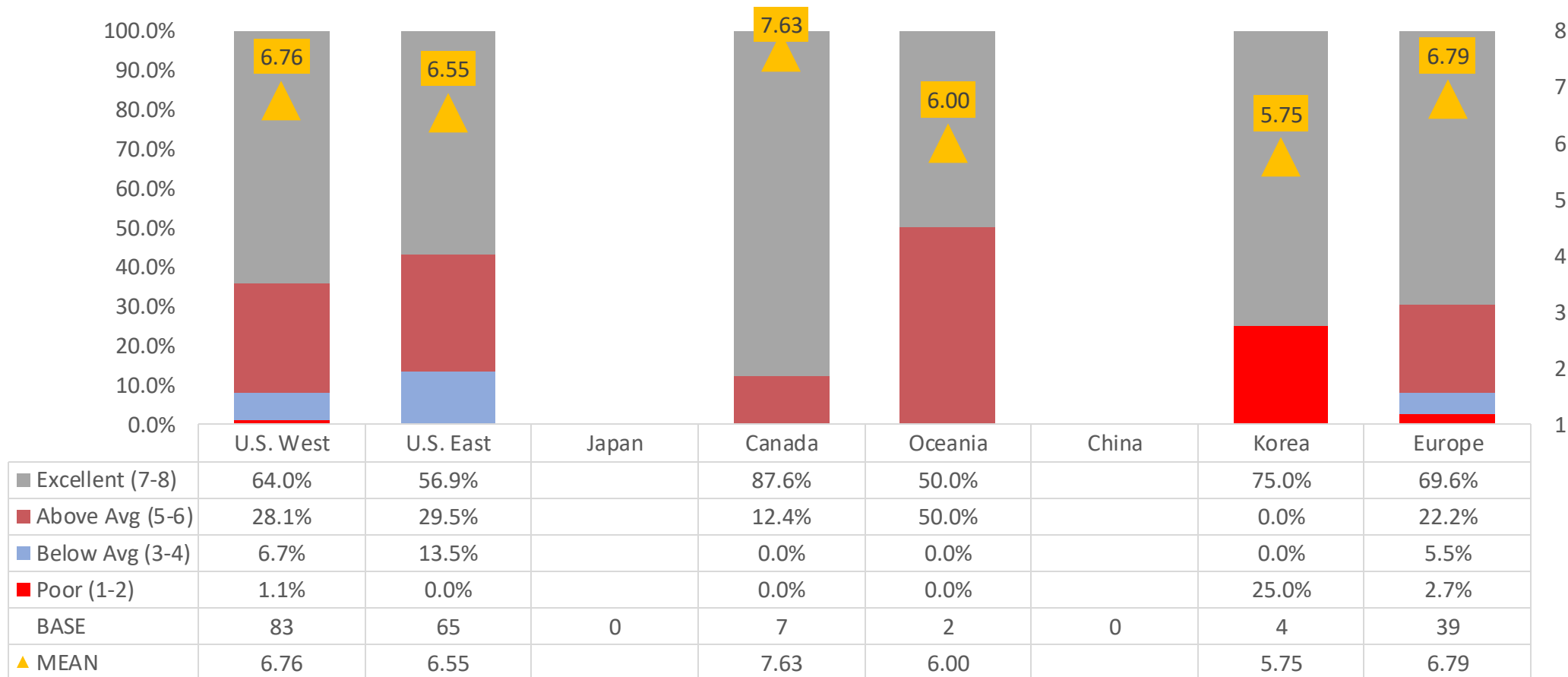
# CULTURAL ACTIVITIES - KAUAI

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



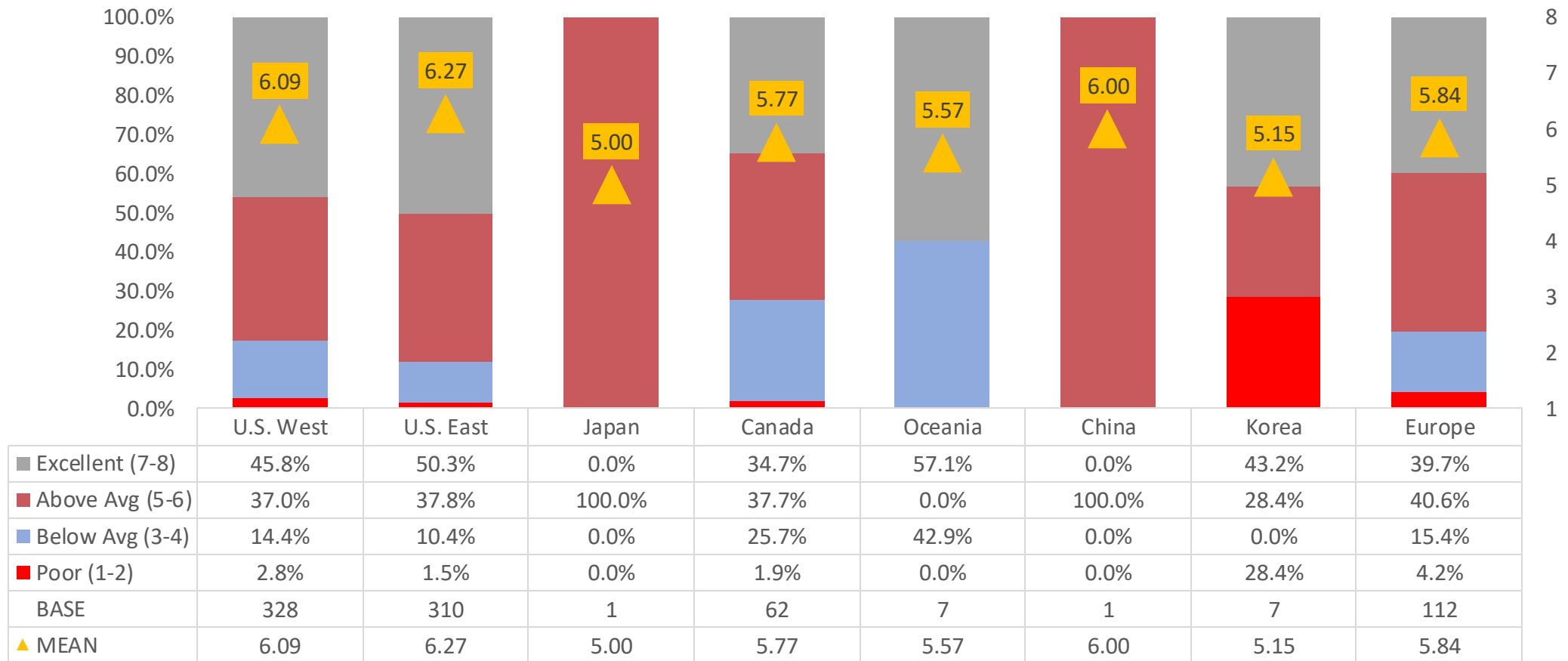
# VOLUNTEER ACTIVITIES - KAUA'I

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



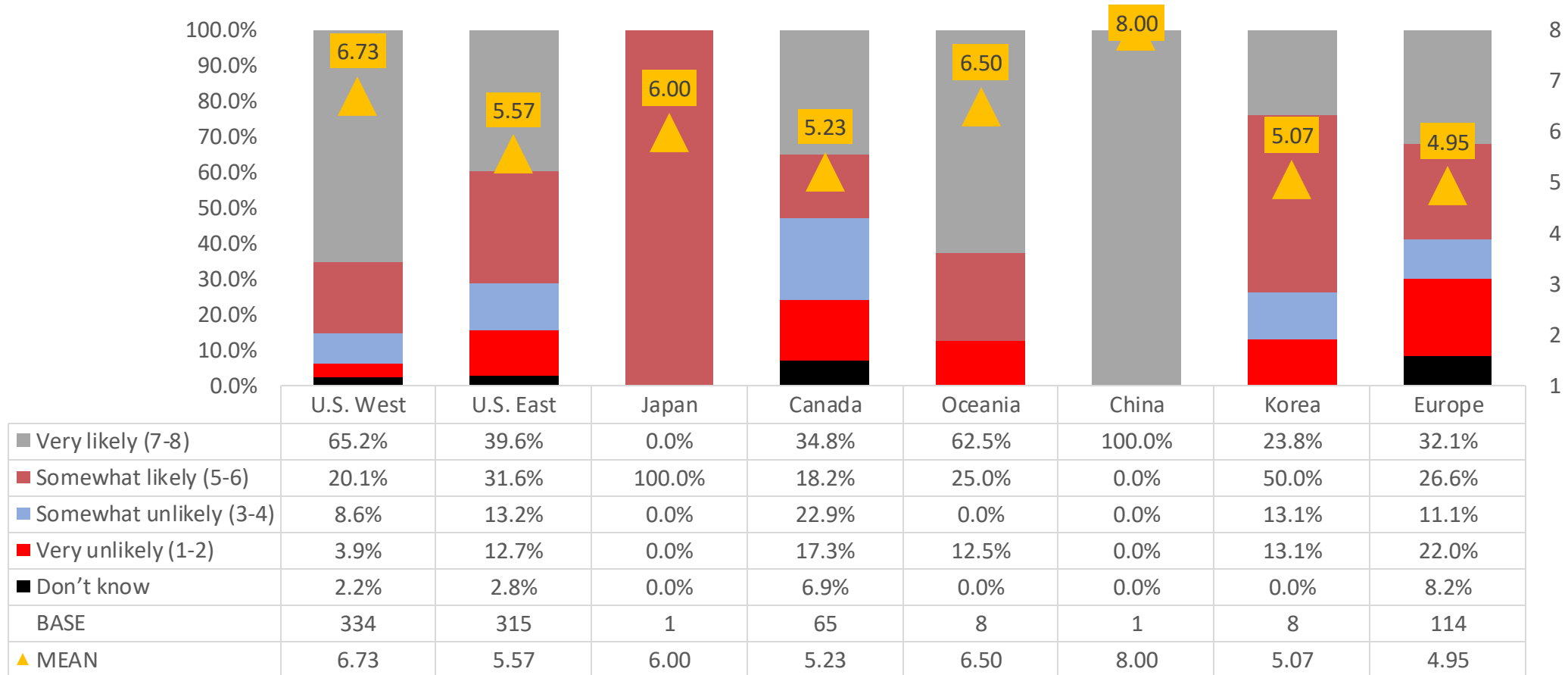
# VALUE FOR THE MONEY – KAUA‘I

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



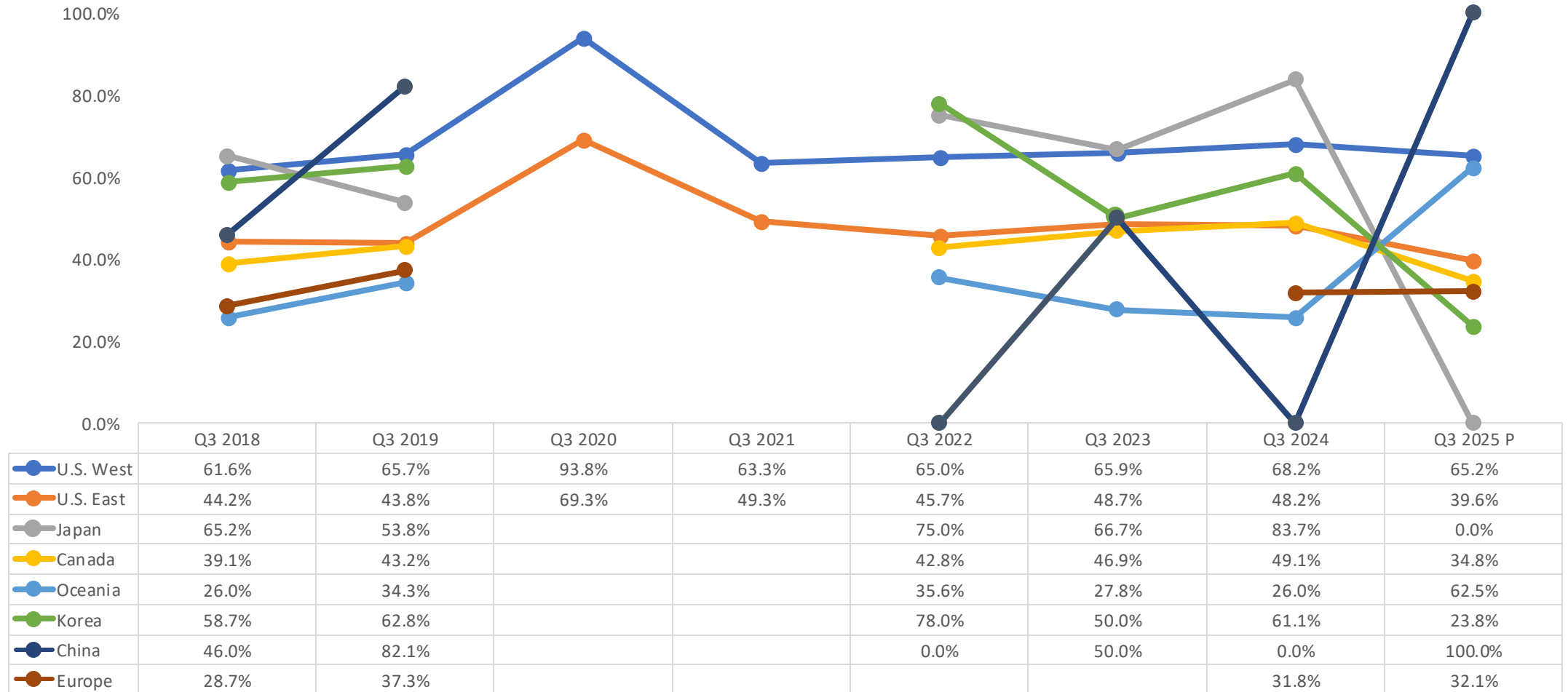
# LIKELIHOOD OF RETURN VISIT – KAUAI

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



# LIKELIHOOD OF RETURN VISIT - KAUUA'I

TOP BOX - VERY LIKELY (7-8)



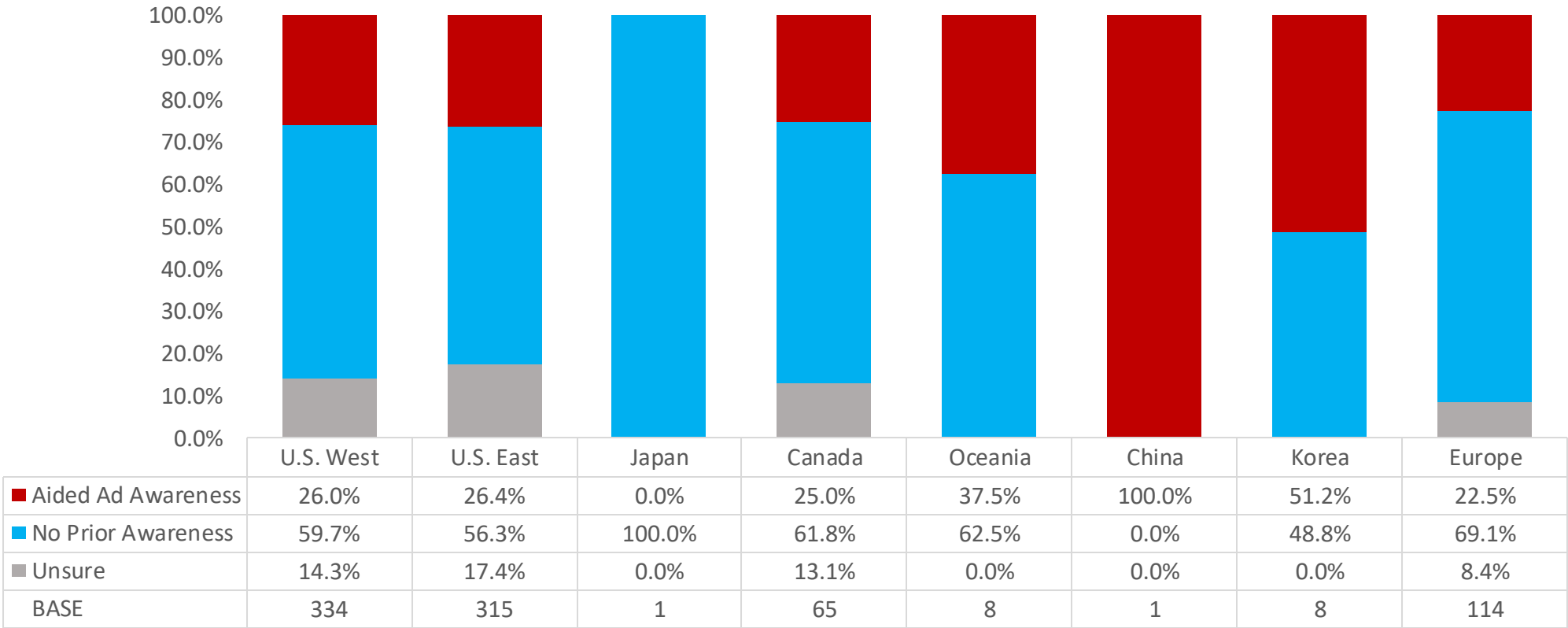
P= Preliminary Data

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

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



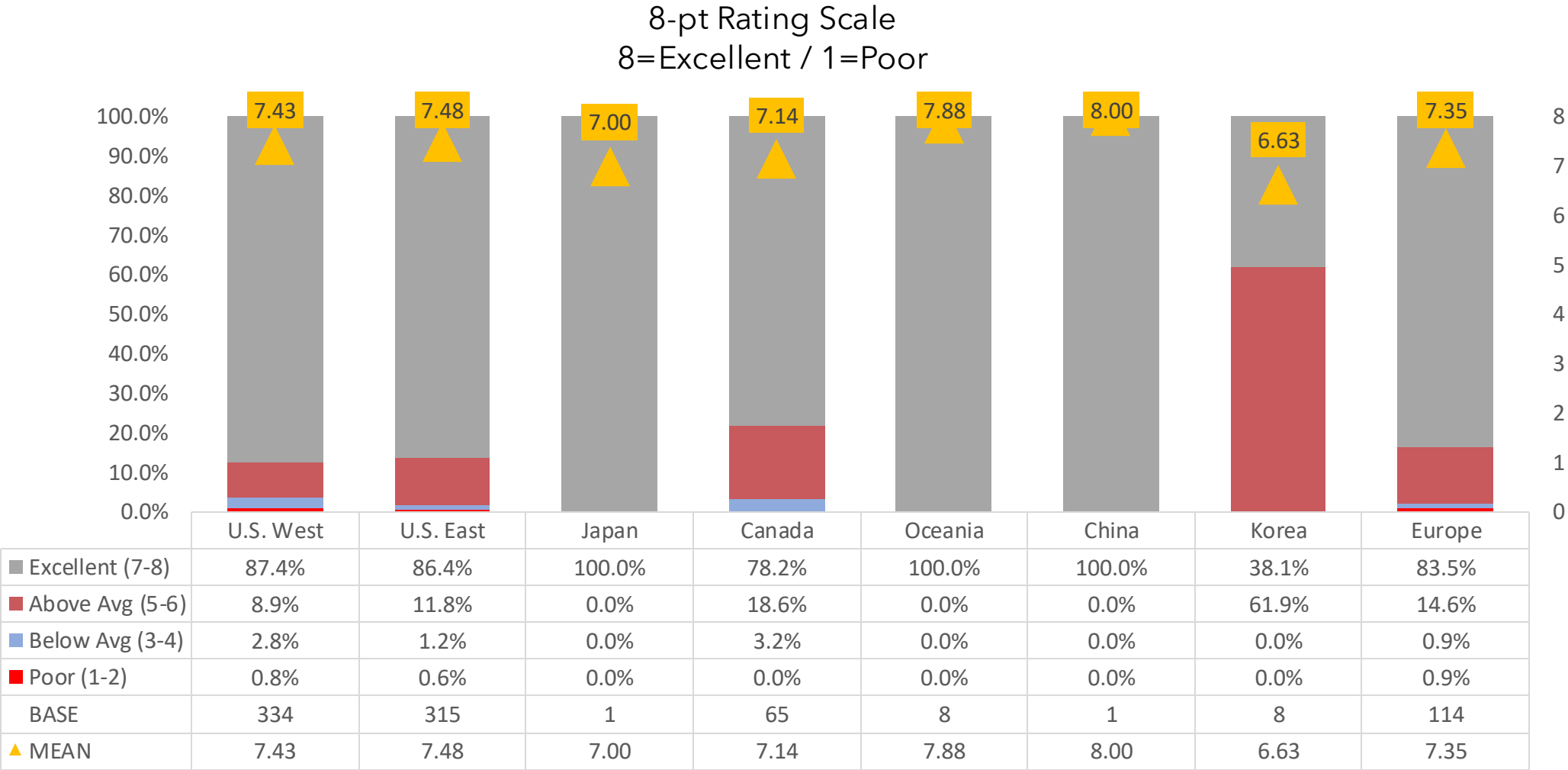
# AIDED ADVERTISING AWARENESS - KAUA'I



# MOTIVATING FACTORS – KAUA‘I

|  | U.S. West | U.S. East | Japan  | Canada | Oceania | China  | Korea | Europe |
|--|-----------|-----------|--------|--------|---------|--------|-------|--------|
| Television programs or movies filmed in Hawai‘i                        | 9.3%      | 12.1%     | 0.0%   | 9.6%   | 0.0%    | 0.0%   | 11.9% | 14.8%  |
| Hawaiian music   | 11.9%     | 5.4%      | 0.0%   | 4.1%   | 0.0%    | 0.0%   | 0.0%  | 6.2%   |
| Social media posts and videos  | 14.0%     | 18.7%     | 0.0%   | 9.1%   | 12.5%   | 0.0%   | 13.1% | 19.6%  |
| Outdoor or sporting activities and events                              | 16.1%     | 11.1%     | 0.0%   | 9.6%   | 0.0%    | 100.0% | 13.1% | 18.8%  |
| Hawaiian cultural experiences and Hawaiian cultural events             | 22.2%     | 16.5%     | 0.0%   | 11.3%  | 25.0%   | 0.0%   | 0.0%  | 15.0%  |
| Famous landmarks or imagery/ natural beauty (beaches, mountains, etc.) | 52.2%     | 50.5%     | 100.0% | 43.6%  | 50.0%   | 0.0%   | 75.0% | 70.0%  |
| Attend a festival or other event                                       | 3.4%      | 2.1%      | 0.0%   | 1.4%   | 0.0%    | 0.0%   | 0.0%  | 0.8%   |
| BASE   | 334       | 315       | 1      | 65     | 8       | 1      | 8     | 114    |

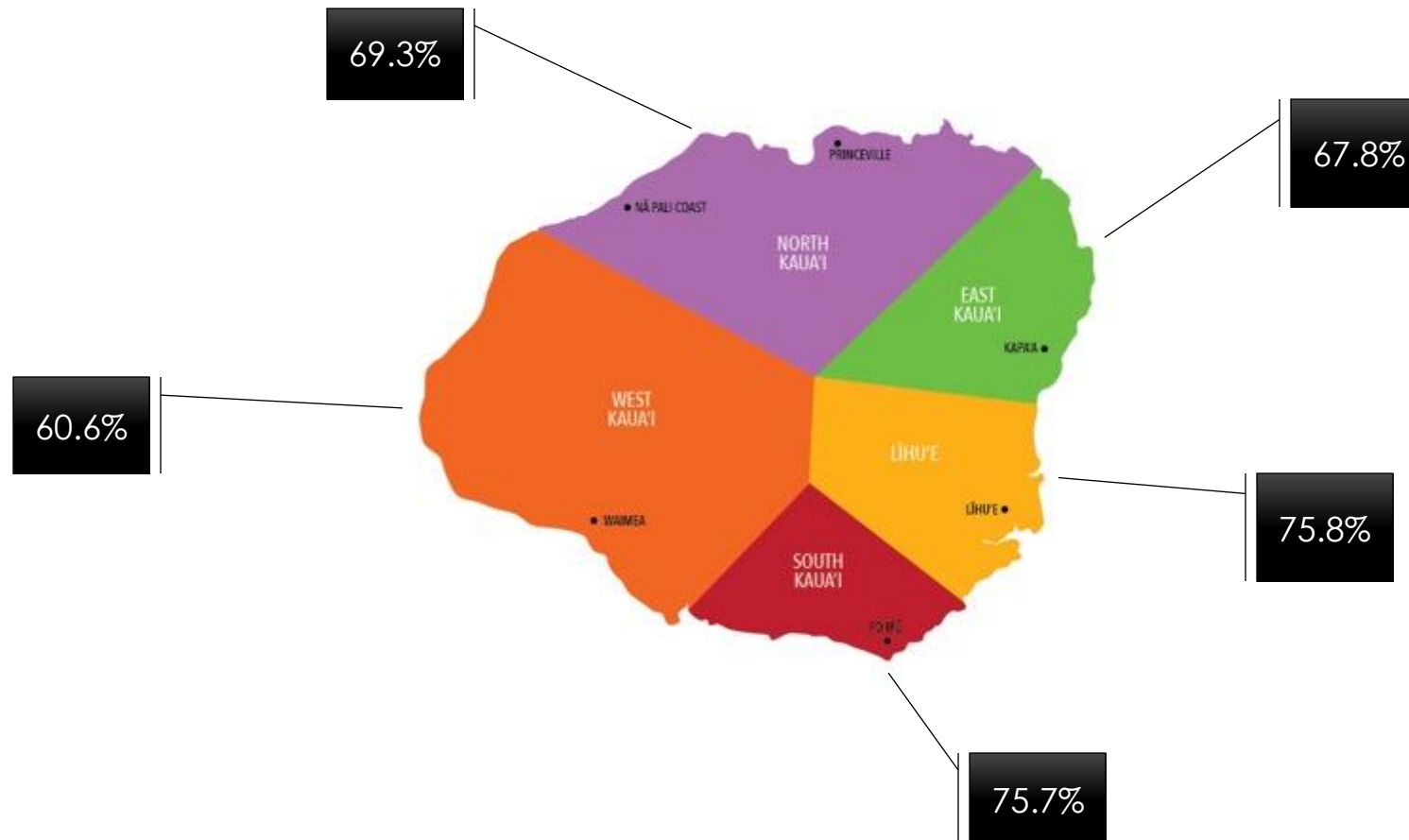
# FRIENDLINESS OF KAUA‘I RESIDENTS



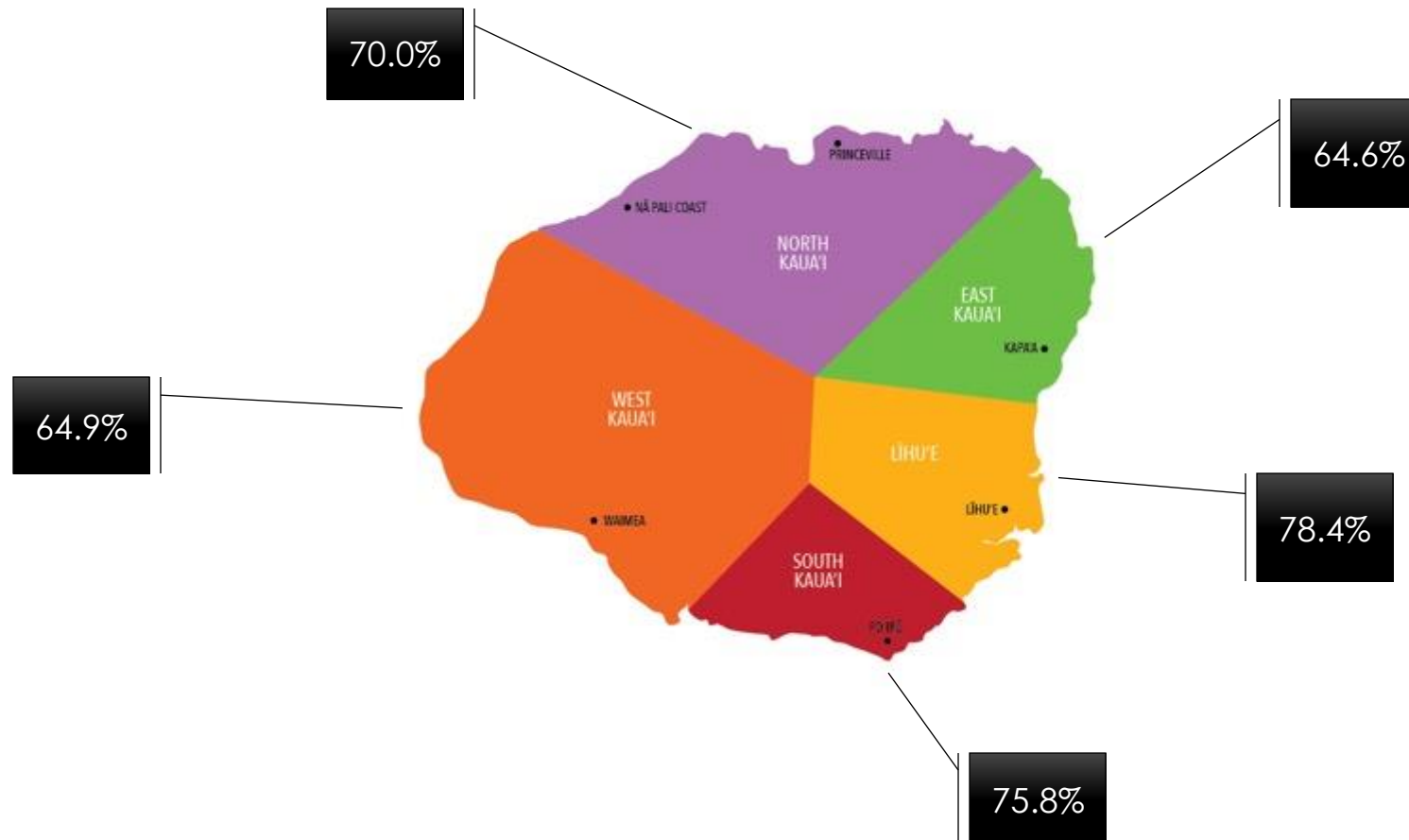
# TOP TRIP INFLUENCERS – KAUA‘I

|                                | U.S. West | U.S. East | Japan  | Canada | Oceania | China  | Korea | Europe |
|--------------------------------|-----------|-----------|--------|--------|---------|--------|-------|--------|
| Been here before               | 48.9%     | 28.3%     | 0.0%   | 28.4%  | 37.5%   | 100.0% | 0.0%  | 15.9%  |
| Friend recommendation          | 22.3%     | 23.1%     | 0.0%   | 31.5%  | 12.5%   | 0.0%   | 23.8% | 23.2%  |
| Cruise line stop/ part of tour | 5.2%      | 16.5%     | 0.0%   | 17.4%  | 25.0%   | 0.0%   | 0.0%  | 7.1%   |
| Social media post              | 3.6%      | 5.9%      | 0.0%   | 4.5%   | 0.0%    | 0.0%   | 39.3% | 6.4%   |
| Travel agent                   | 1.6%      | 3.8%      | 100.0% | 0.0%   | 0.0%    | 0.0%   | 11.9% | 13.8%  |
| Article/ blog                  | 1.0%      | 3.7%      | 0.0%   | 3.2%   | 0.0%    | 0.0%   | 0.0%  | 18.6%  |
| Attending conference/ event    | 2.5%      | 2.2%      | 0.0%   | 0.0%   | 0.0%    | 0.0%   | 0.0%  | 0.0%   |
| Movie                          | 0.0%      | 1.7%      | 0.0%   | 0.0%   | 0.0%    | 0.0%   | 0.0%  | 2.6%   |
| Advertisement                  | 0.0%      | 1.0%      | 0.0%   | 1.4%   | 0.0%    | 0.0%   | 0.0%  | 1.9%   |
| BASE                           | 334       | 315       | 1      | 65     | 8       | 1      | 8     | 114    |

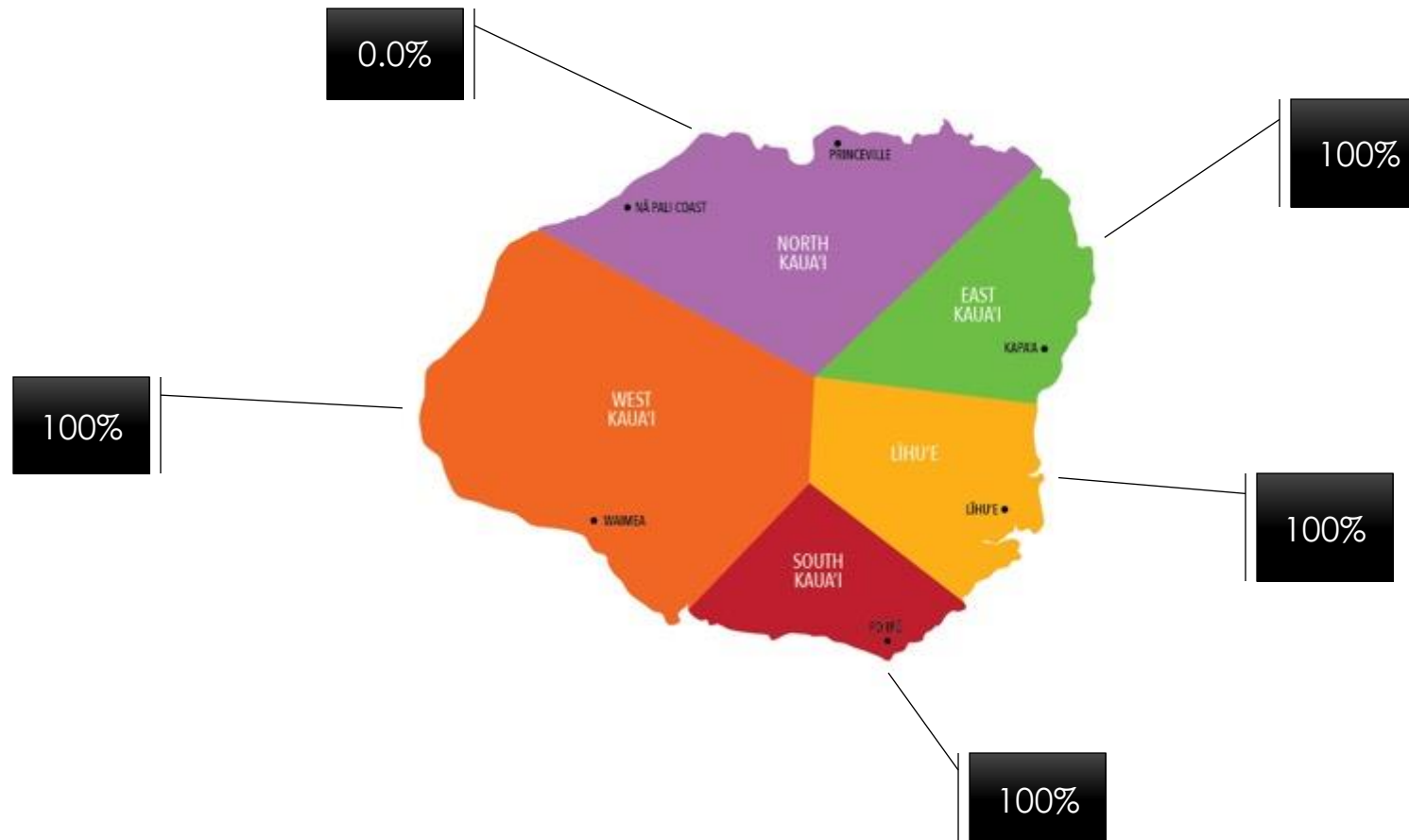
# AREAS VISITED - KAUA'I U.S. WEST



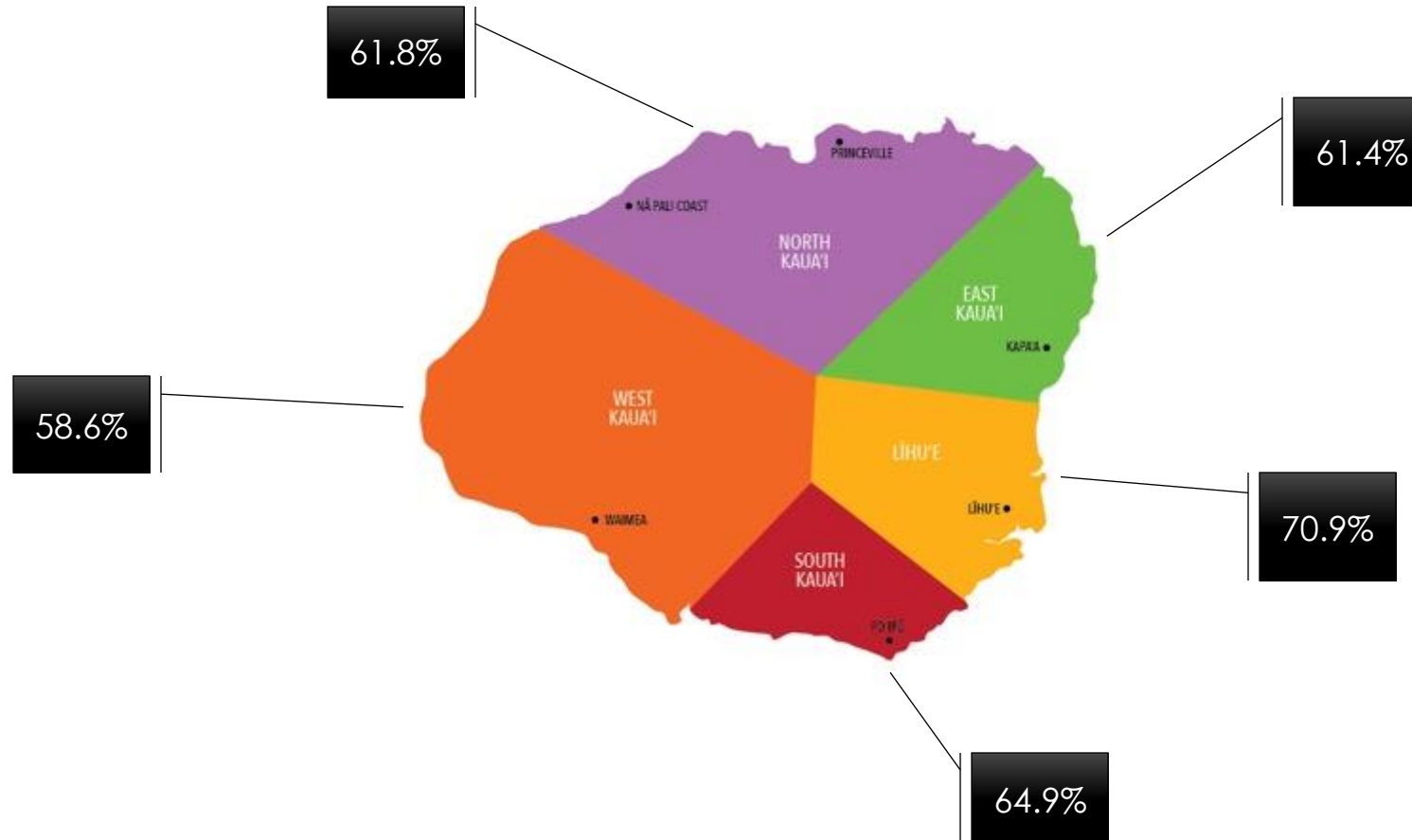
# AREAS VISITED - KAUA'I U.S. EAST



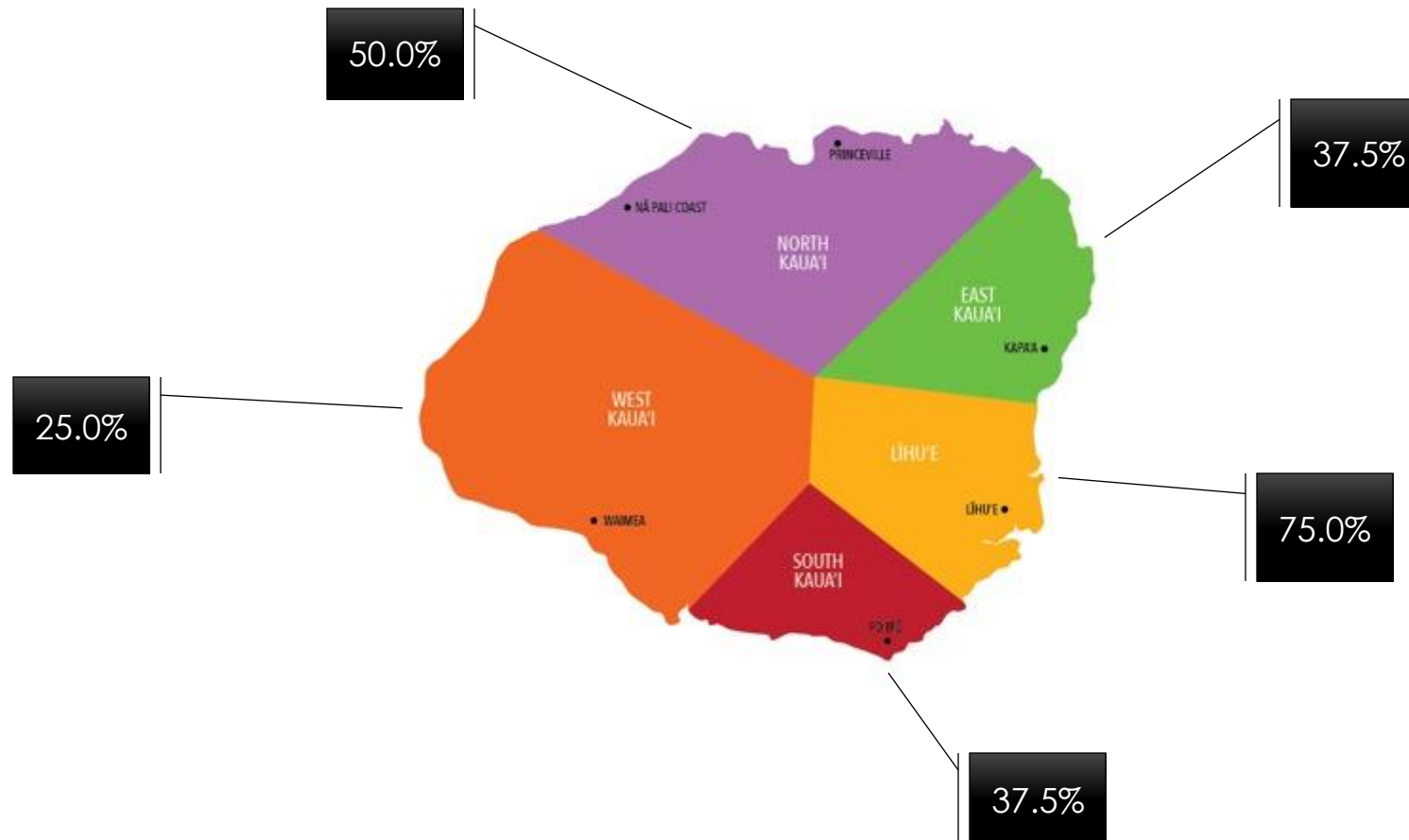
# AREAS VISITED - KAUA'I JAPAN



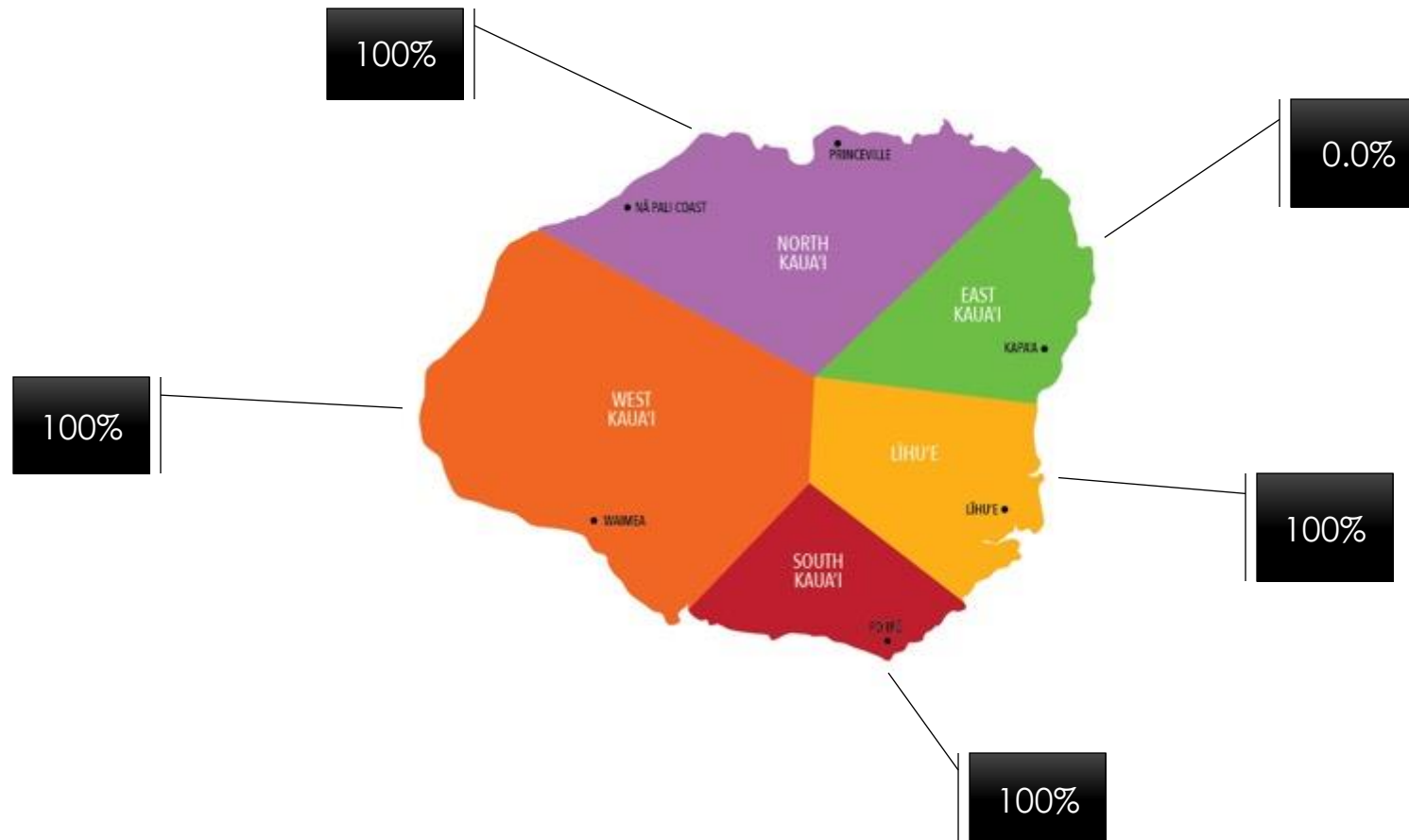
# AREAS VISITED - KAUA'I CANADA



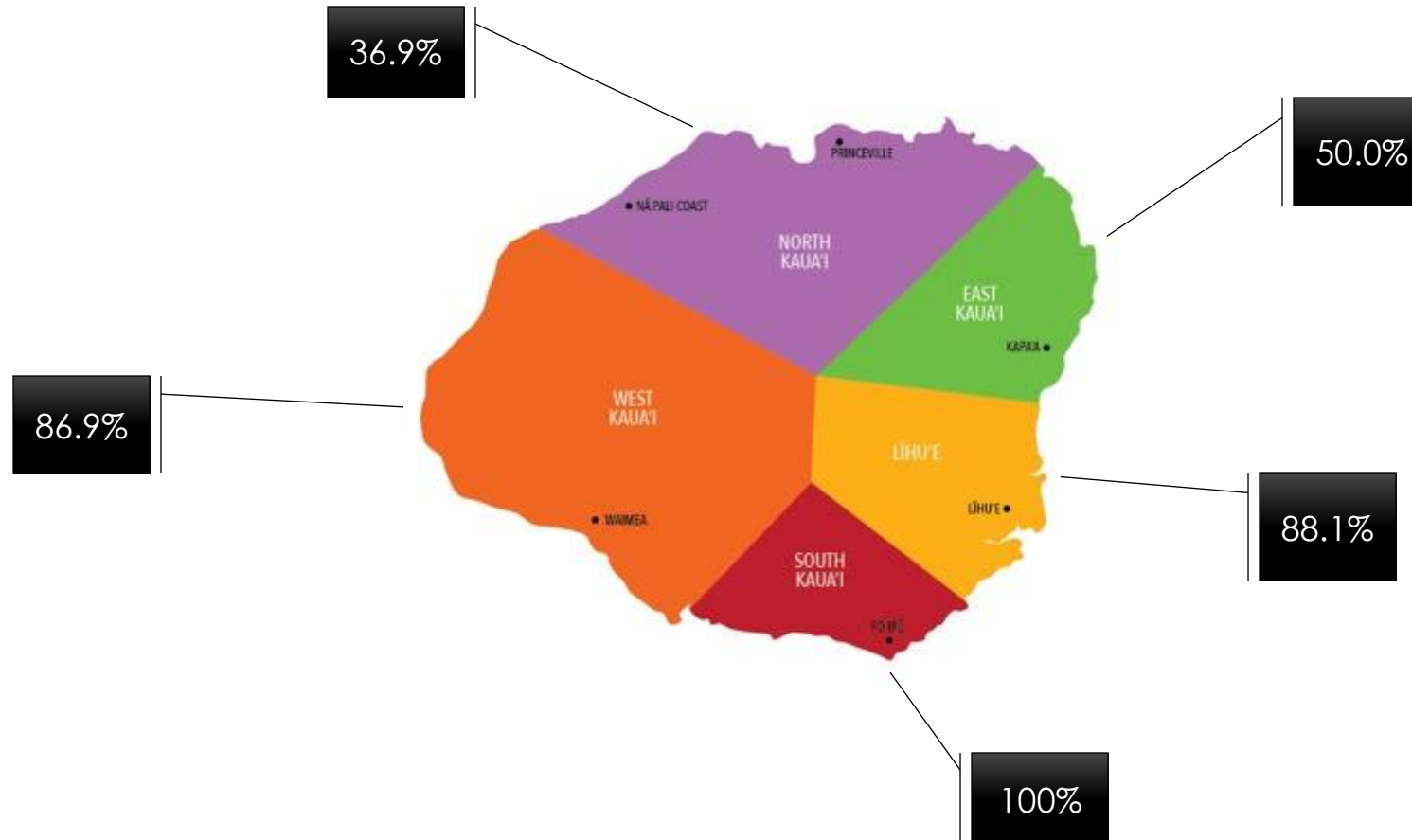
# AREAS VISITED - KAUA'I OCEANIA



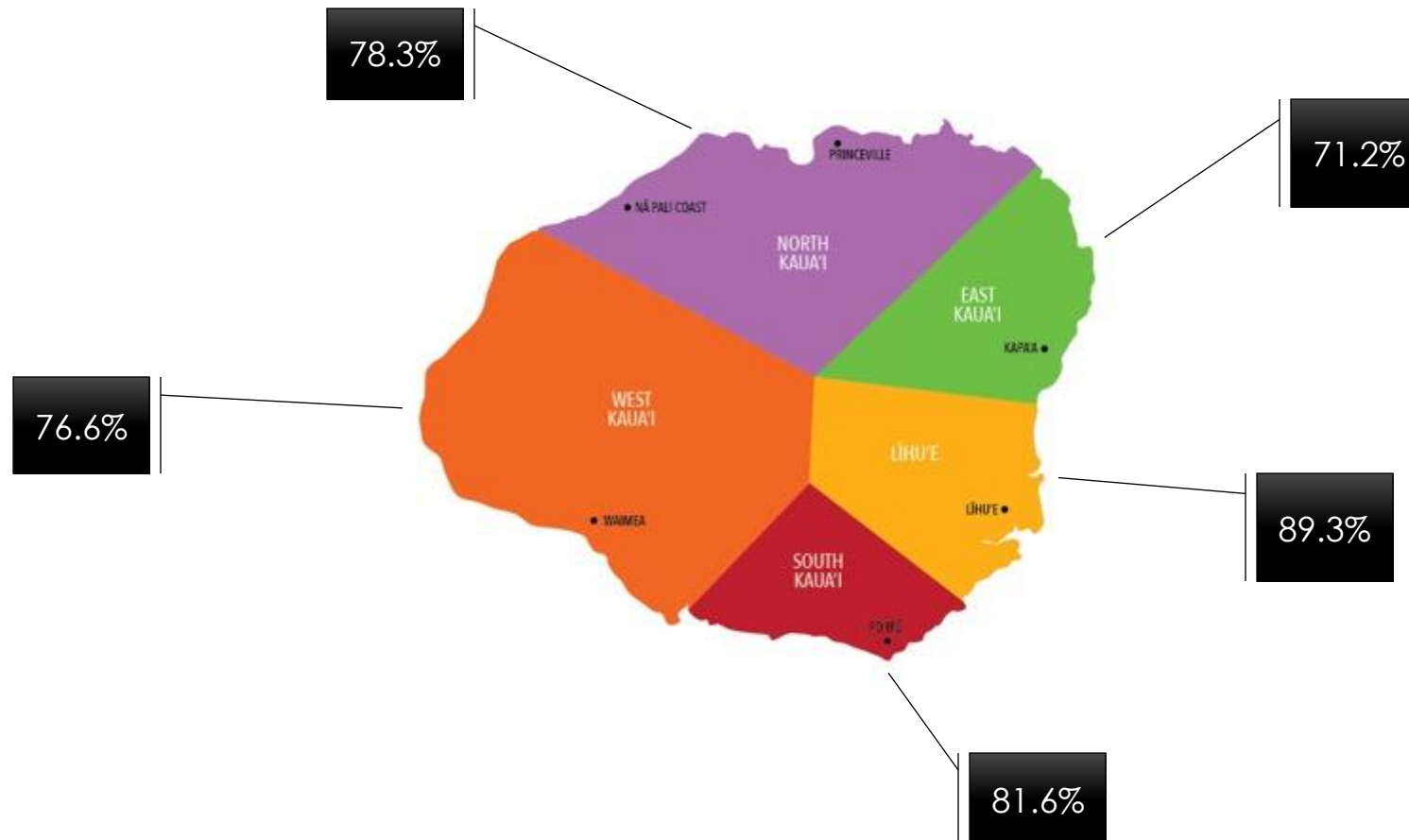
# AREAS VISITED - KAUA'I CHINA



# AREAS VISITED - KAUA'I KOREA



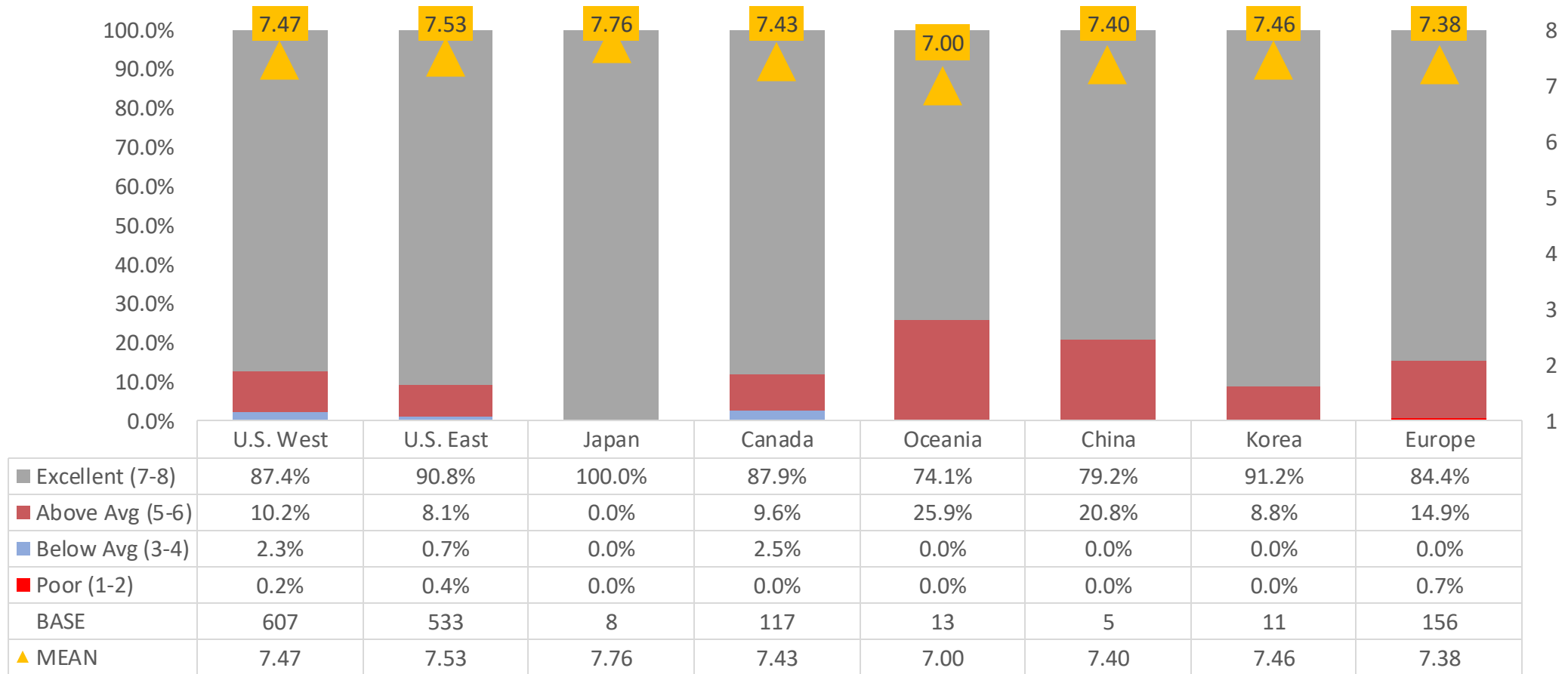
# AREAS VISITED - KAUA'I EUROPE



# Section 9 – Maui

# SATISFACTION - MAUI

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

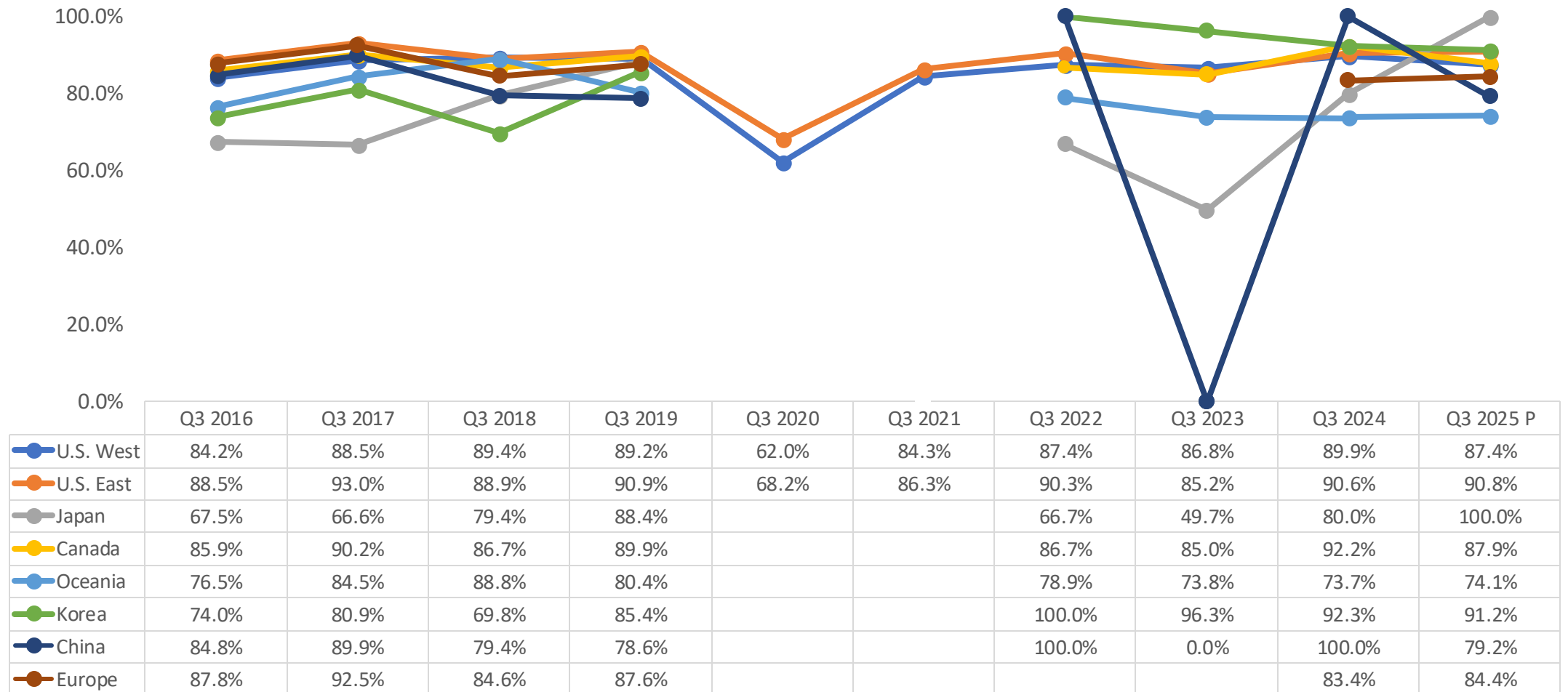


# SATISFACTION – MAUI

- **Gender:** Female visitors from **U.S. West** and **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.

# SATISFACTION - MAUI

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



P= Preliminary Data

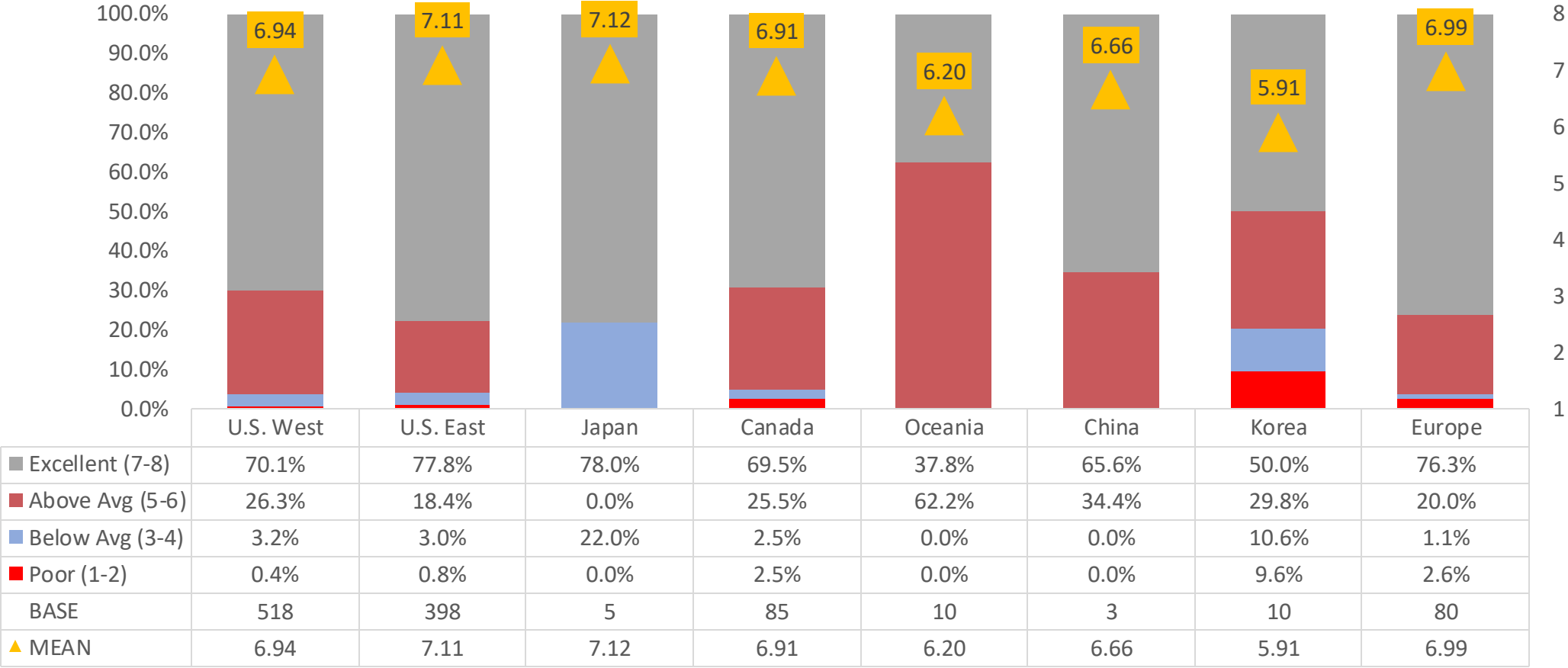
Q. How would you rate your most recent trip to the state of Hawai'i? How would you rate your experience on\_\_\_?

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.



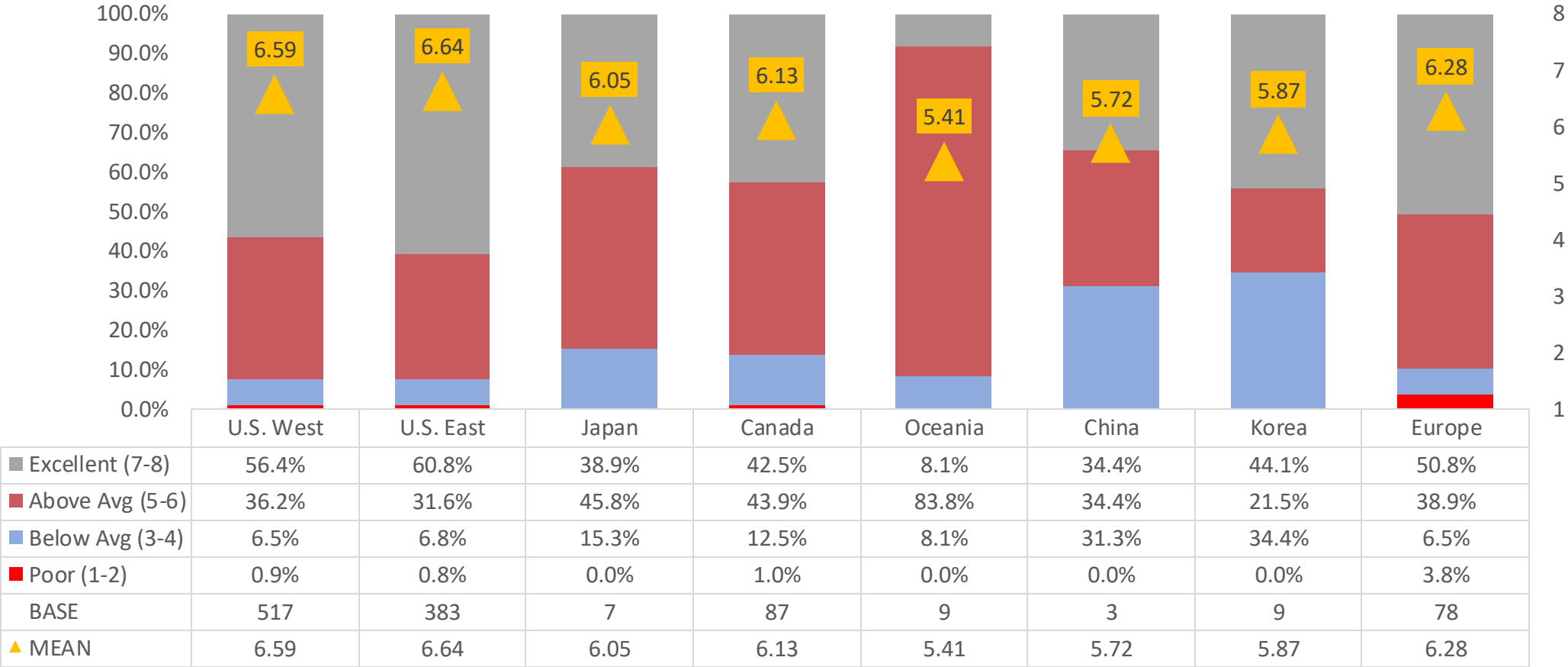
# ENTERTAINMENT/ ATTRACTIONS - MAUI

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



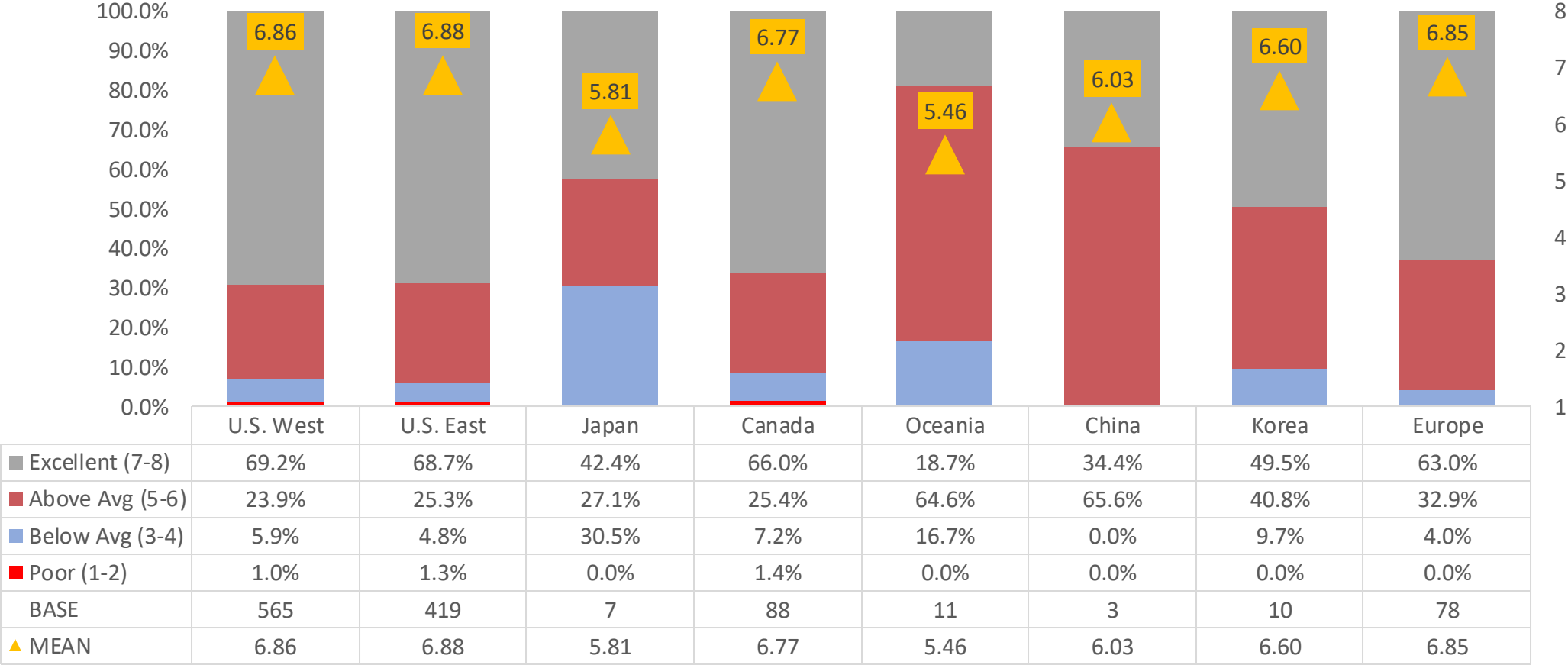
# SHOPPING - MAUI

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



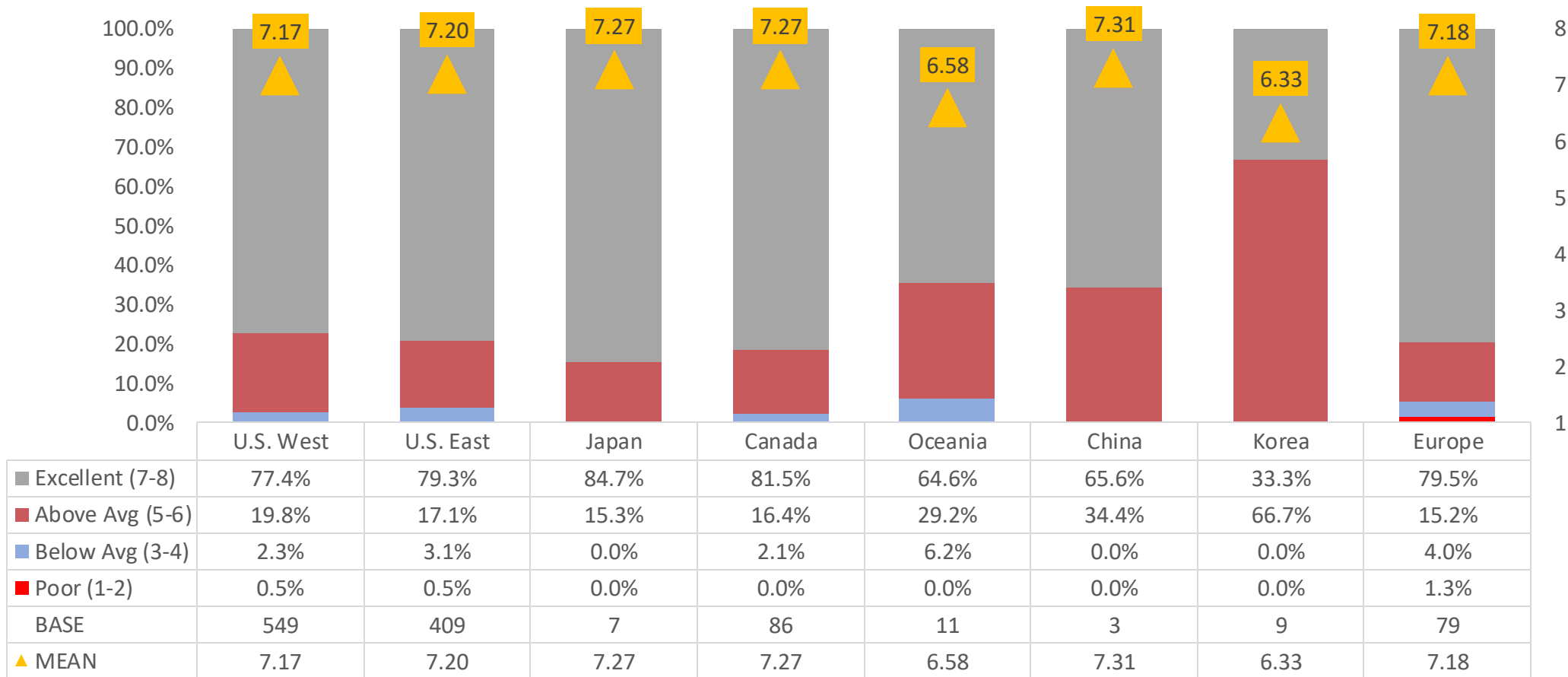
# DINING/ FOOD & BEVERAGE - MAUI

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



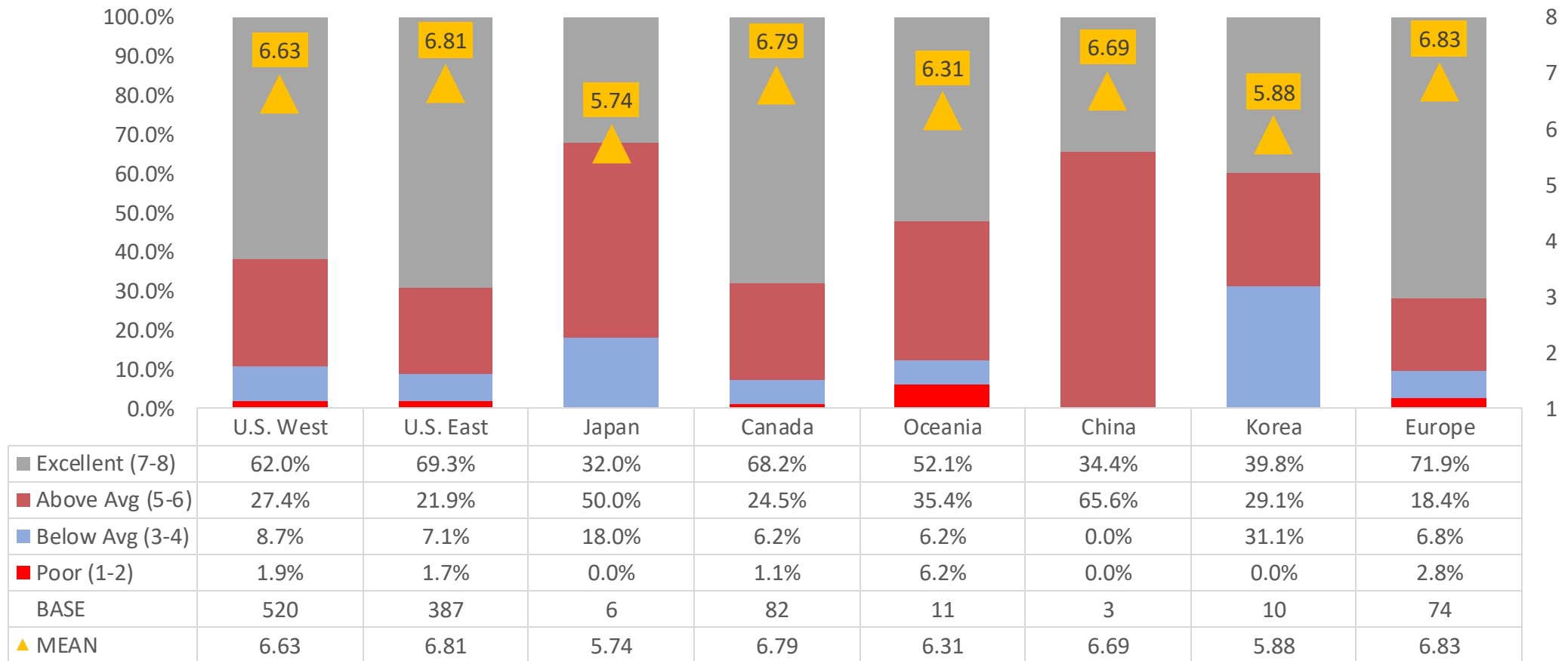
# LODGING/ ACCOMMODATIONS - MAUI

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



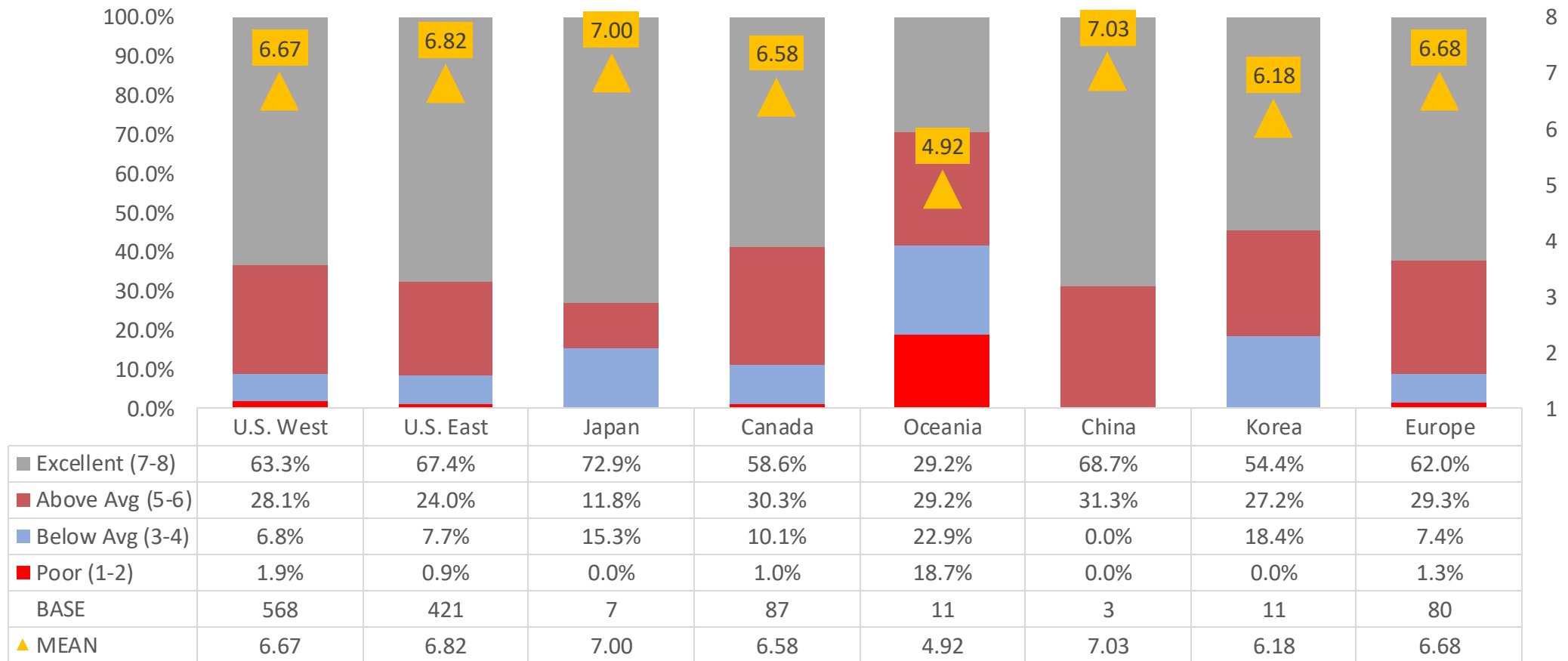
# TRANSPORTATION ON ISLAND - MAUI

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

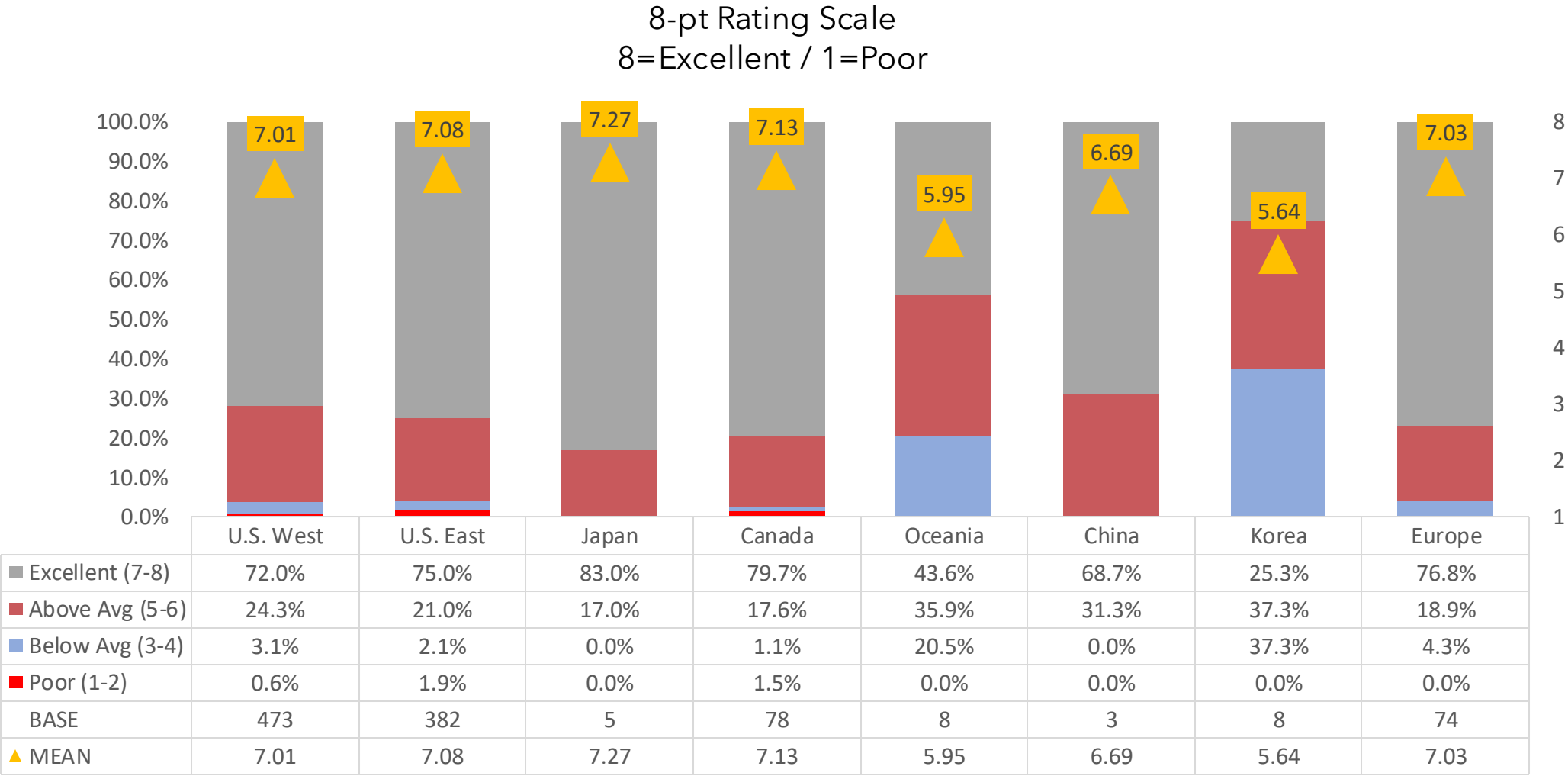


# AIRPORT - MAUI

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

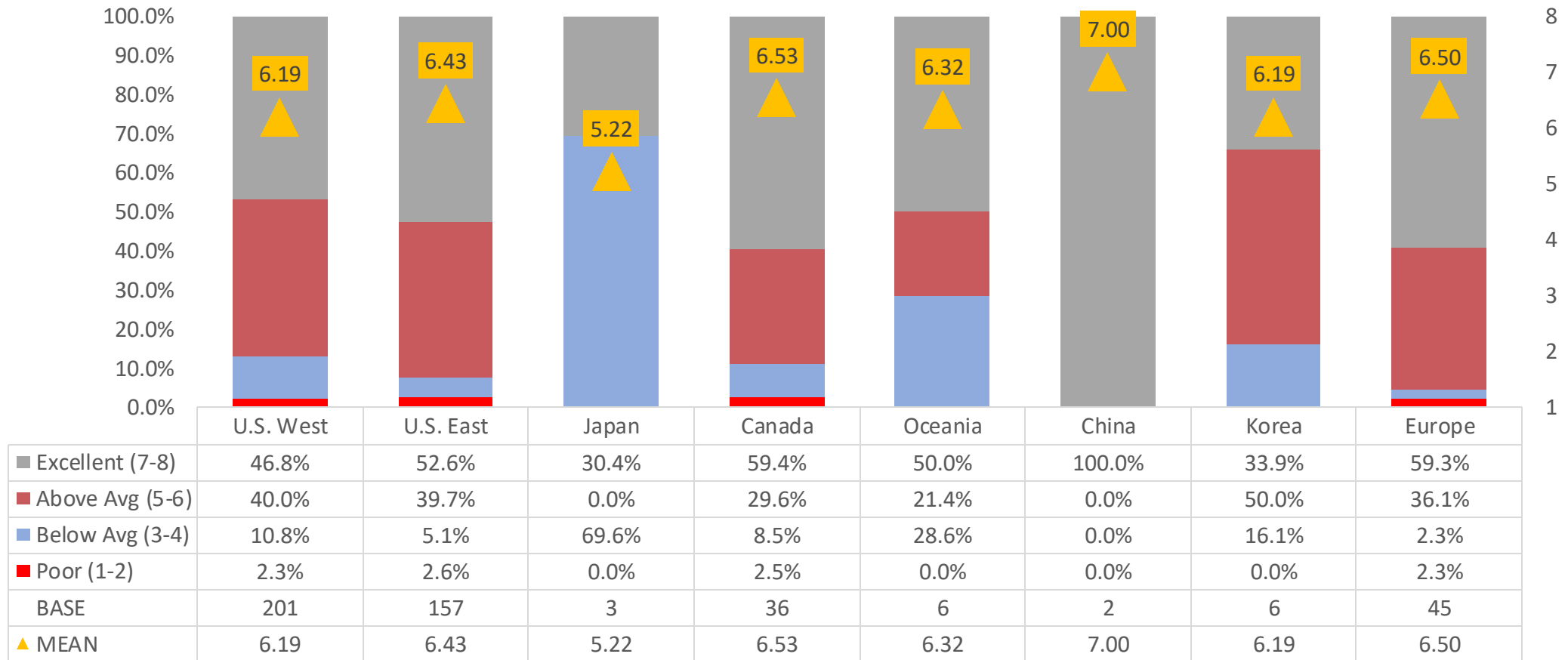


# CULTURAL EXPERIENCES - MAUI



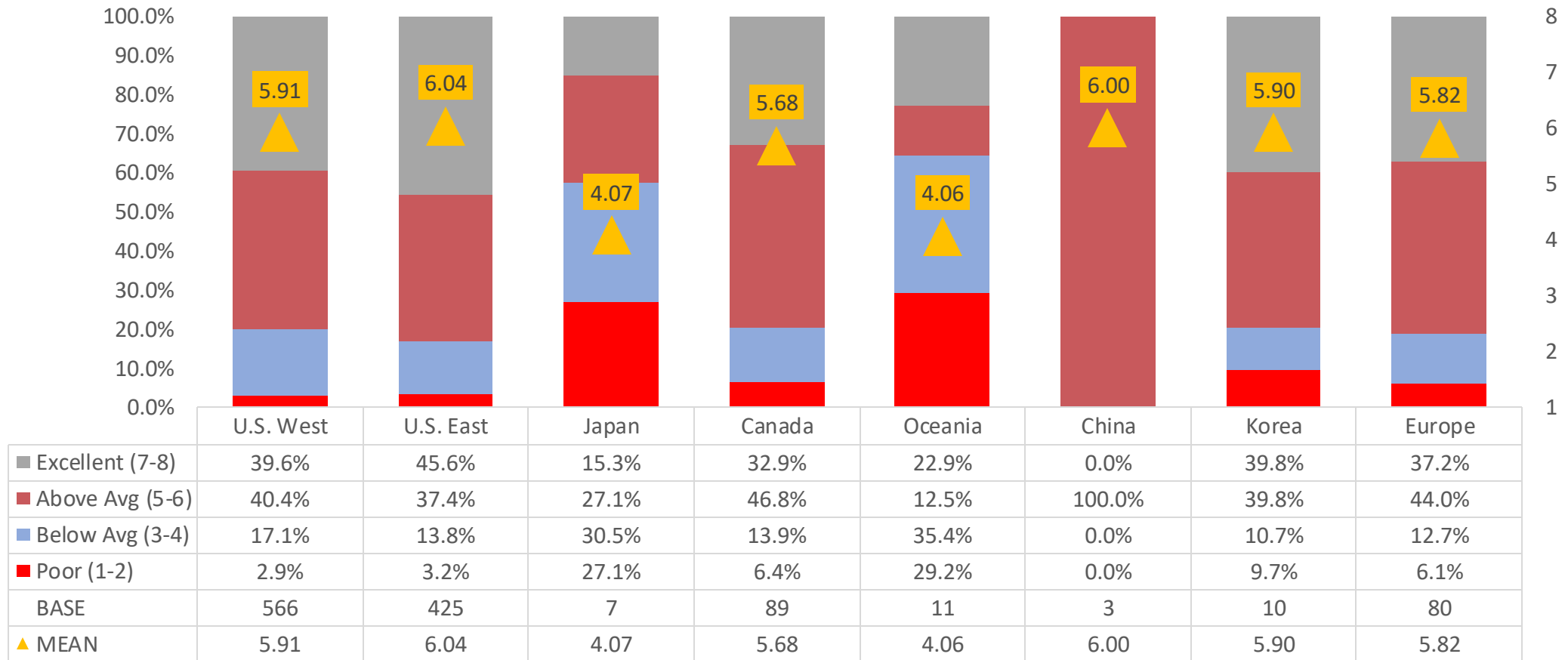
# VOLUNTEER EXPERIENCES - MAUI

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



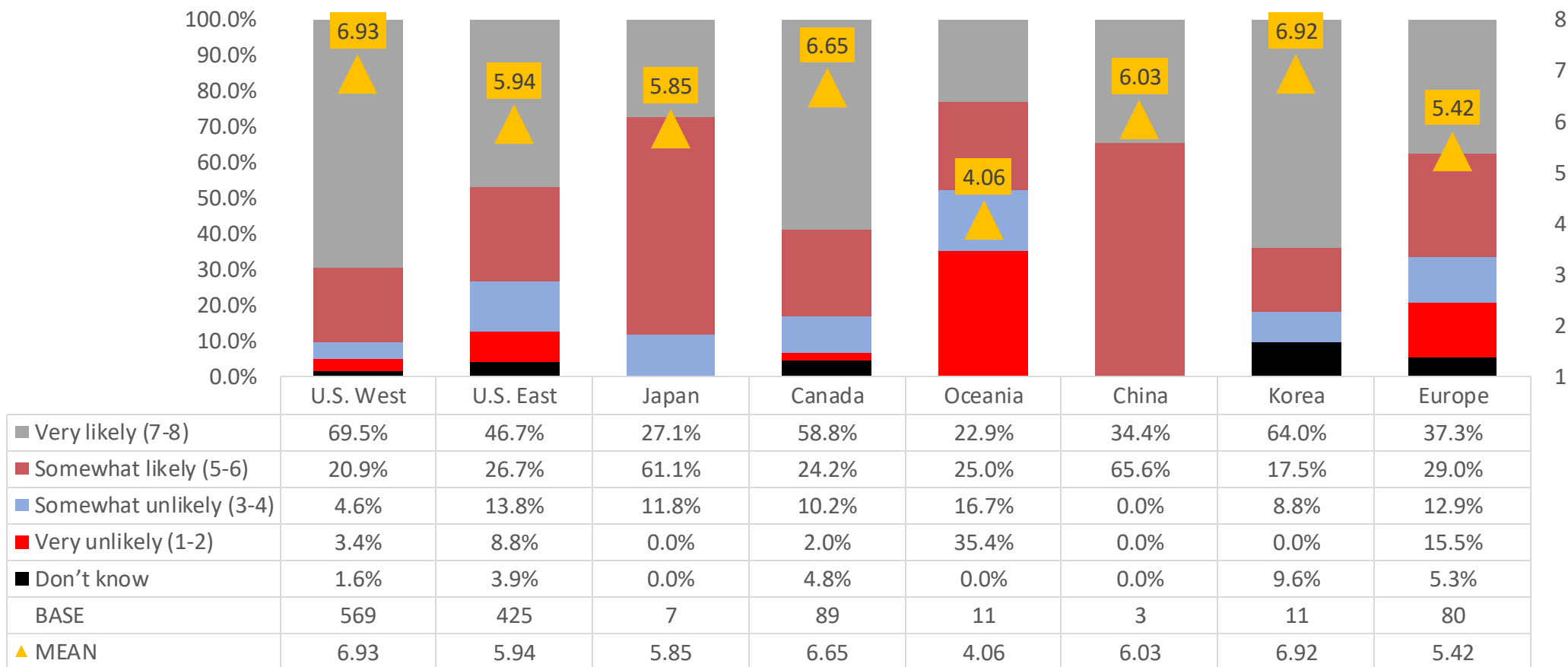
# VALUE FOR THE MONEY – MAUI

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



# LIKELIHOOD OF RETURN VISIT - MAUI

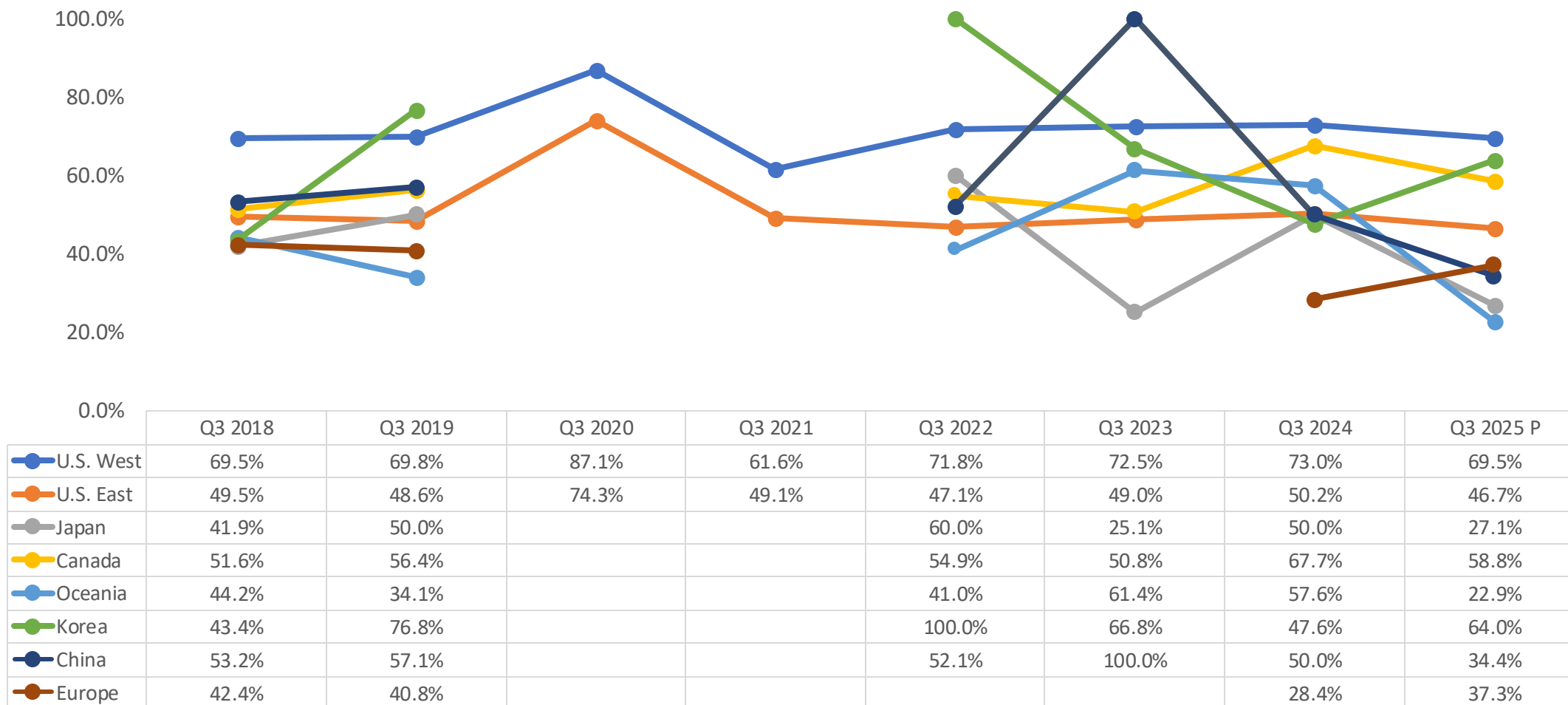
8-pt Rating Scale  
8 = Very likely / 1 = Very unlikely



# LIKELIHOOD OF RETURN VISIT - MAUI

TOP BOX - VERY LIKELY (7-8)

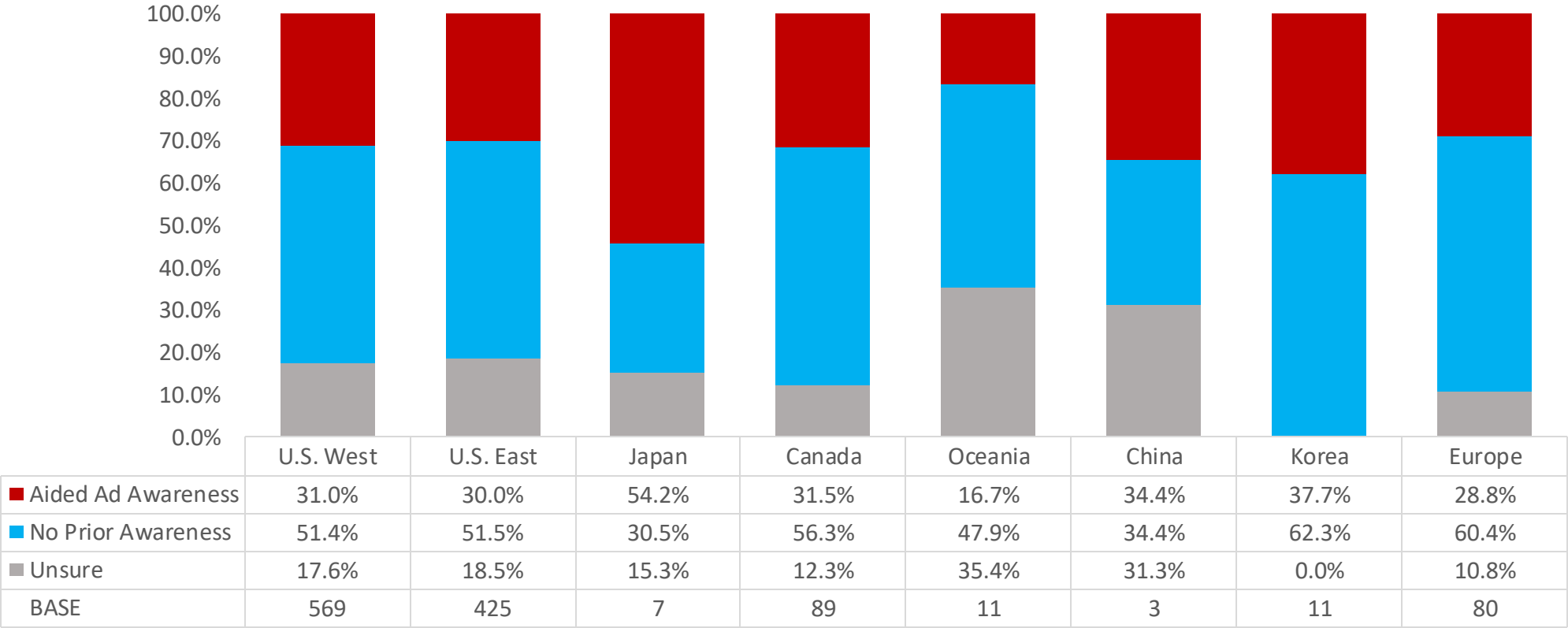
100.0%  
80.0%  
60.0%  
40.0%  
20.0%  
0.0%



P= Preliminary Data

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

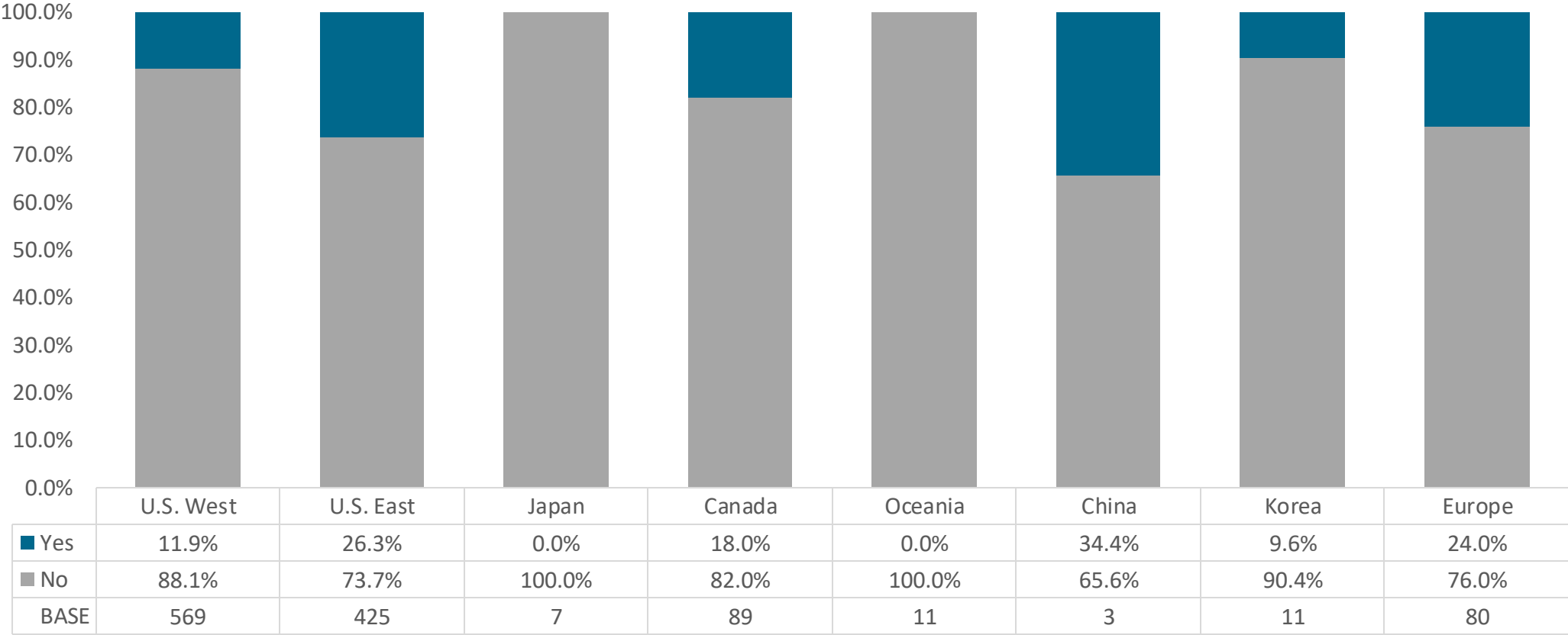
# AIDED ADVERTISING AWARENESS - MAUI



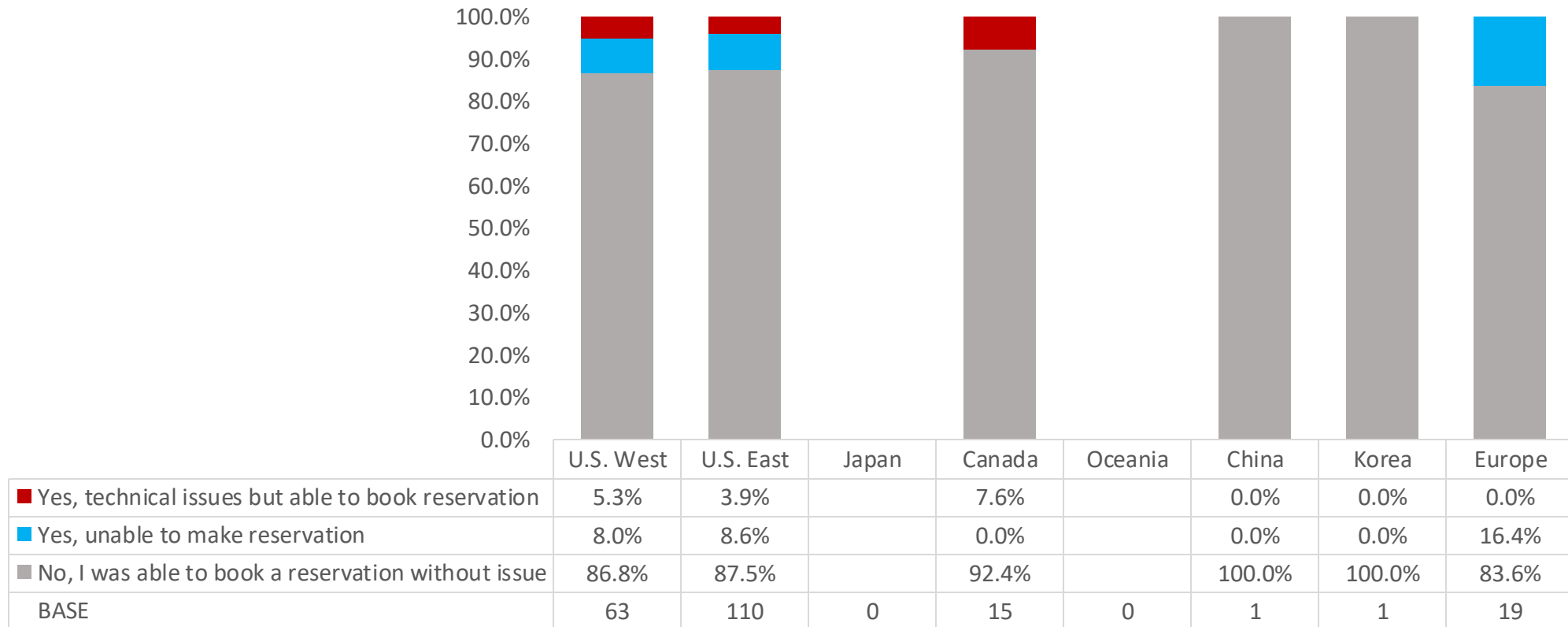
# MOTIVATING FACTORS - MAUI

|   | U.S. West | U.S. East | Japan | Canada | Oceania | China  | Korea | Europe |
|---|-----------|-----------|-------|--------|---------|--------|-------|--------|
| Television programs or movies filmed in Hawai'i                           | 7.5%      | 11.9%     | 0.0%  | 12.6%  | 16.7%   | 0.0%   | 0.0%  | 25.6%  |
| Hawaiian music  | 14.0%     | 10.8%     | 15.3% | 11.5%  | 0.0%    | 0.0%   | 0.0%  | 15.9%  |
| Social media posts and videos   | 14.8%     | 23.4%     | 30.5% | 19.0%  | 6.2%    | 0.0%   | 27.2% | 28.2%  |
| Outdoor or sporting activities and events                                 | 14.9%     | 13.5%     | 27.1% | 14.9%  | 6.2%    | 0.0%   | 8.8%  | 21.1%  |
| Hawaiian cultural experiences and Hawaiian cultural events                | 22.9%     | 28.4%     | 27.1% | 23.1%  | 22.9%   | 34.4%  | 0.0%  | 25.1%  |
| Famous landmarks or imagery/<br>natural beauty (beaches, mountains, etc.) | 47.3%     | 50.2%     | 45.8% | 52.3%  | 52.1%   | 100.0% | 63.2% | 59.7%  |
| Attend a festival or other event  | 4.6%      | 2.3%      | 0.0%  | 2.0%   | 6.2%    | 34.4%  | 0.0%  | 1.3%   |
| BASE  | 569       | 425       | 7     | 89     | 11      | 3      | 11    | 80     |

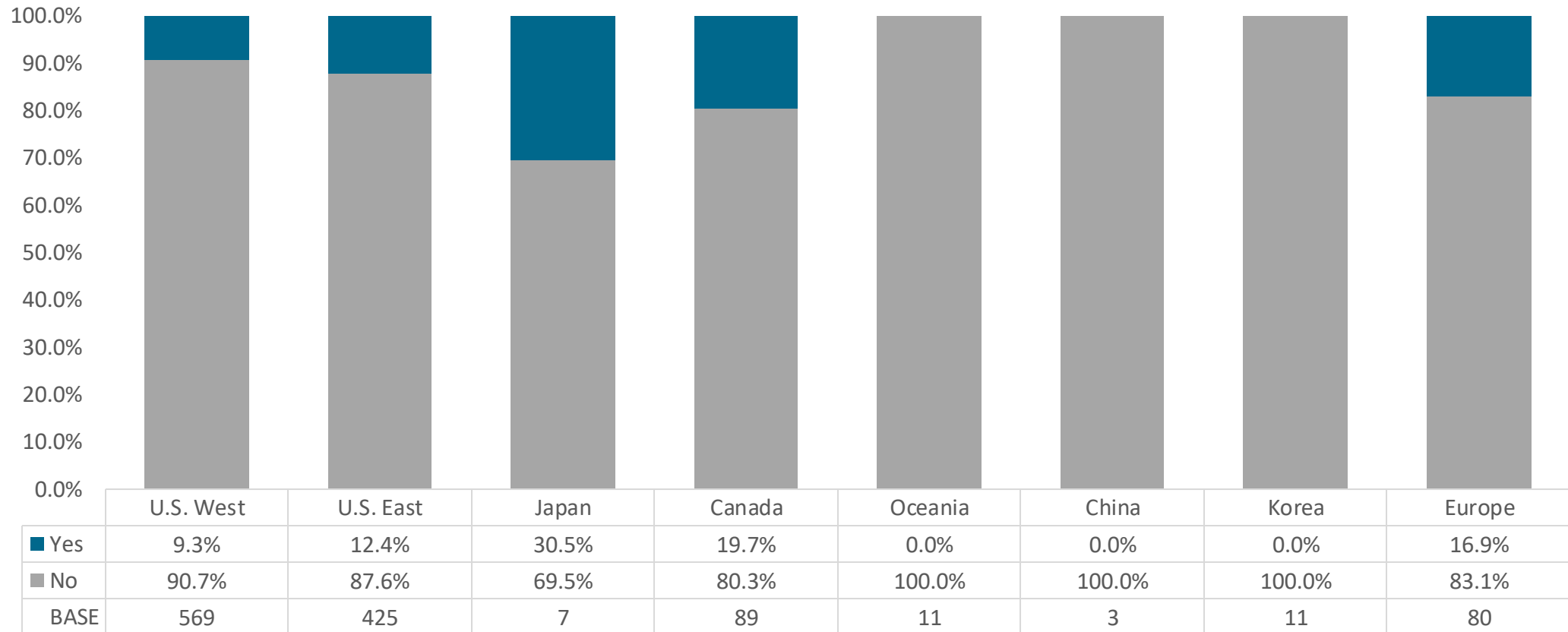
# WAI‘ĀNAPANAPA STATE PARK - RESERVATIONS SYSTEM USE



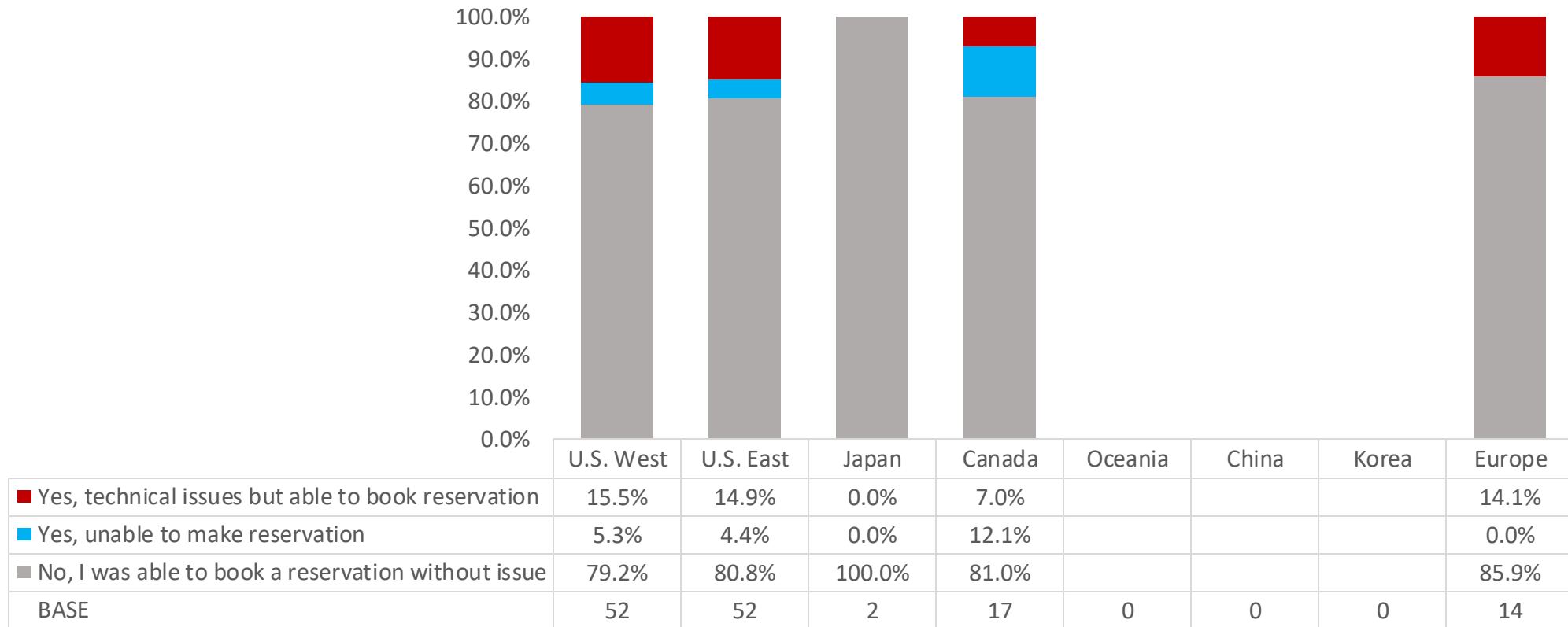
# WAI‘ĀNAPANAPA STATE PARK - RESERVATIONS SYSTEM PROBLEMS



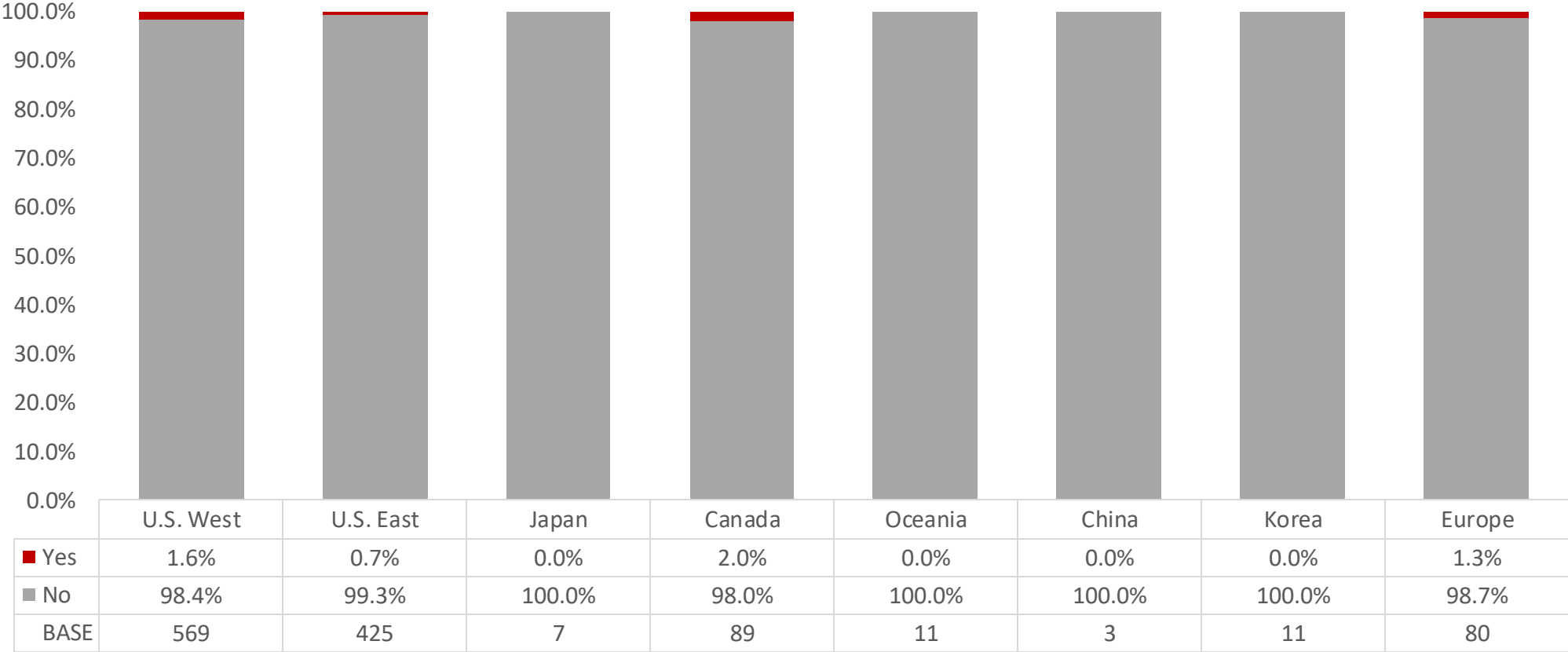
# ‘ĪAO VALLEY STATE MONUMENT - RESERVATIONS SYSTEM USE



# ‘ĪAO VALLEY STATE MONUMENT - RESERVATIONS SYSTEM PROBLEMS



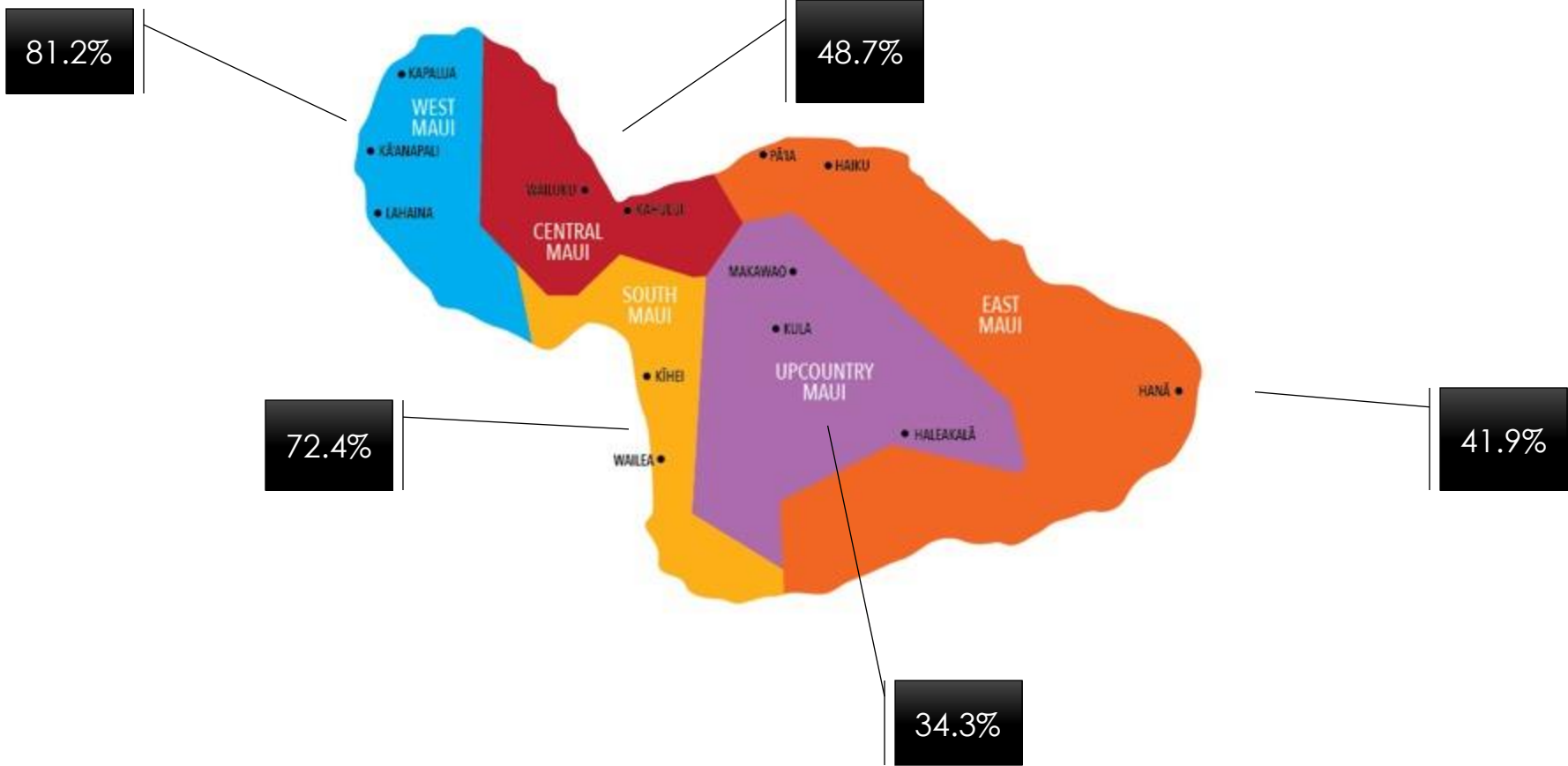
# VISITED MAUI FOR SPECIFIC EVENT



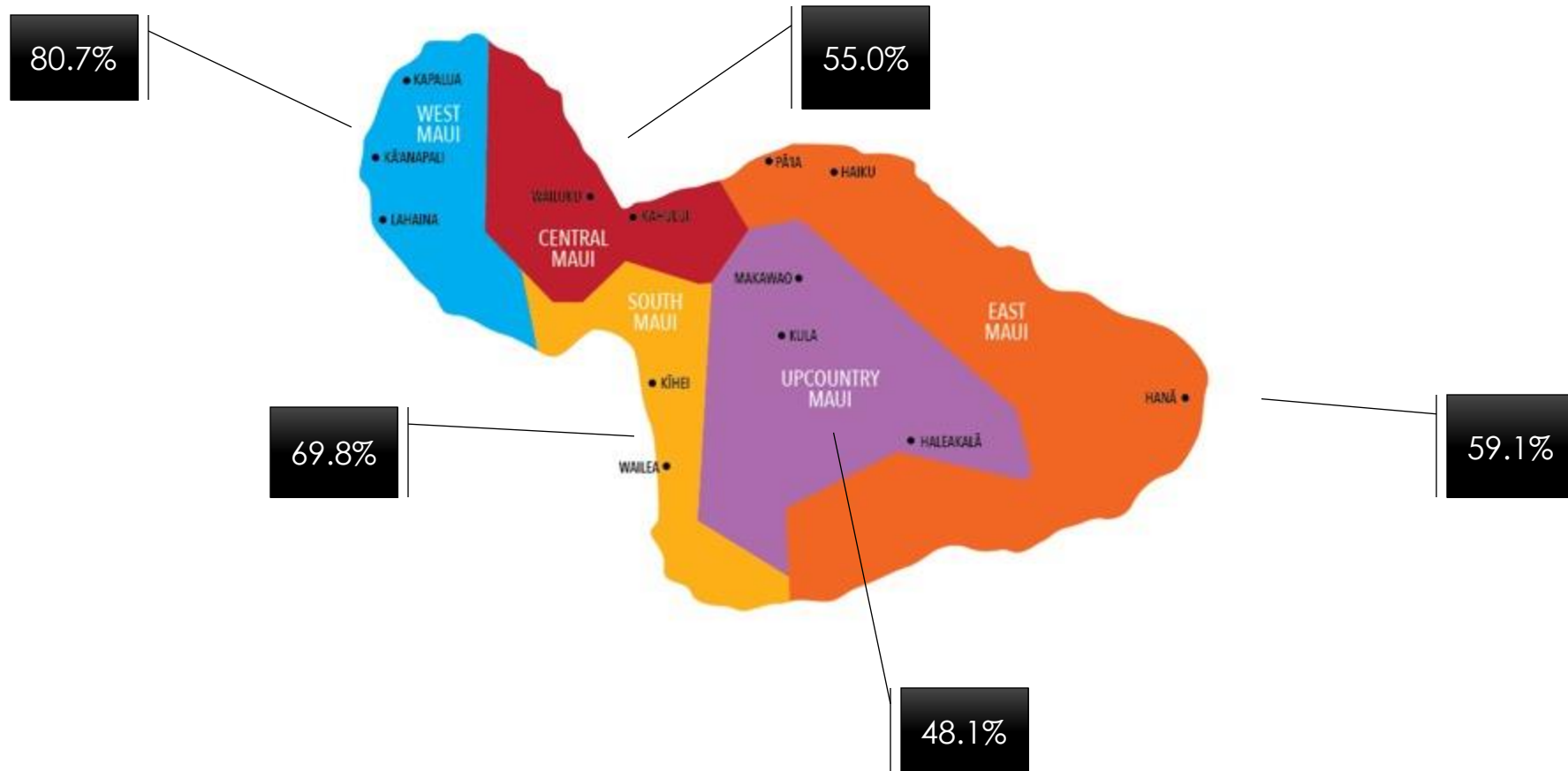
# VISITED MAUI FOR SPECIFIC EVENT

|                               | U.S. West | U.S. East | Japan | Canada | Oceania | Korea | China | Europe |
|-------------------------------|-----------|-----------|-------|--------|---------|-------|-------|--------|
| Hawaii Food and Wine Festival | 19.0%     | 0.0%      | -     | 0.0%   | -       | -     | -     | 100.0% |
| Kapalua Food & Wine Festival  | 19.0%     | 0.0%      | -     | 0.0%   | -       | -     | -     | 0.0%   |
| Maui Invitational             | 0.0%      | 38.4%     | -     | 0.0%   | -       | -     | -     | 0.0%   |
| Other                         | 61.9%     | 61.6%     | -     | 100.0% | -       | -     | -     | 0.0%   |
| BASE                          | 8         | 3         | 0     | 2      | 0       | 0     | 0     | 1      |

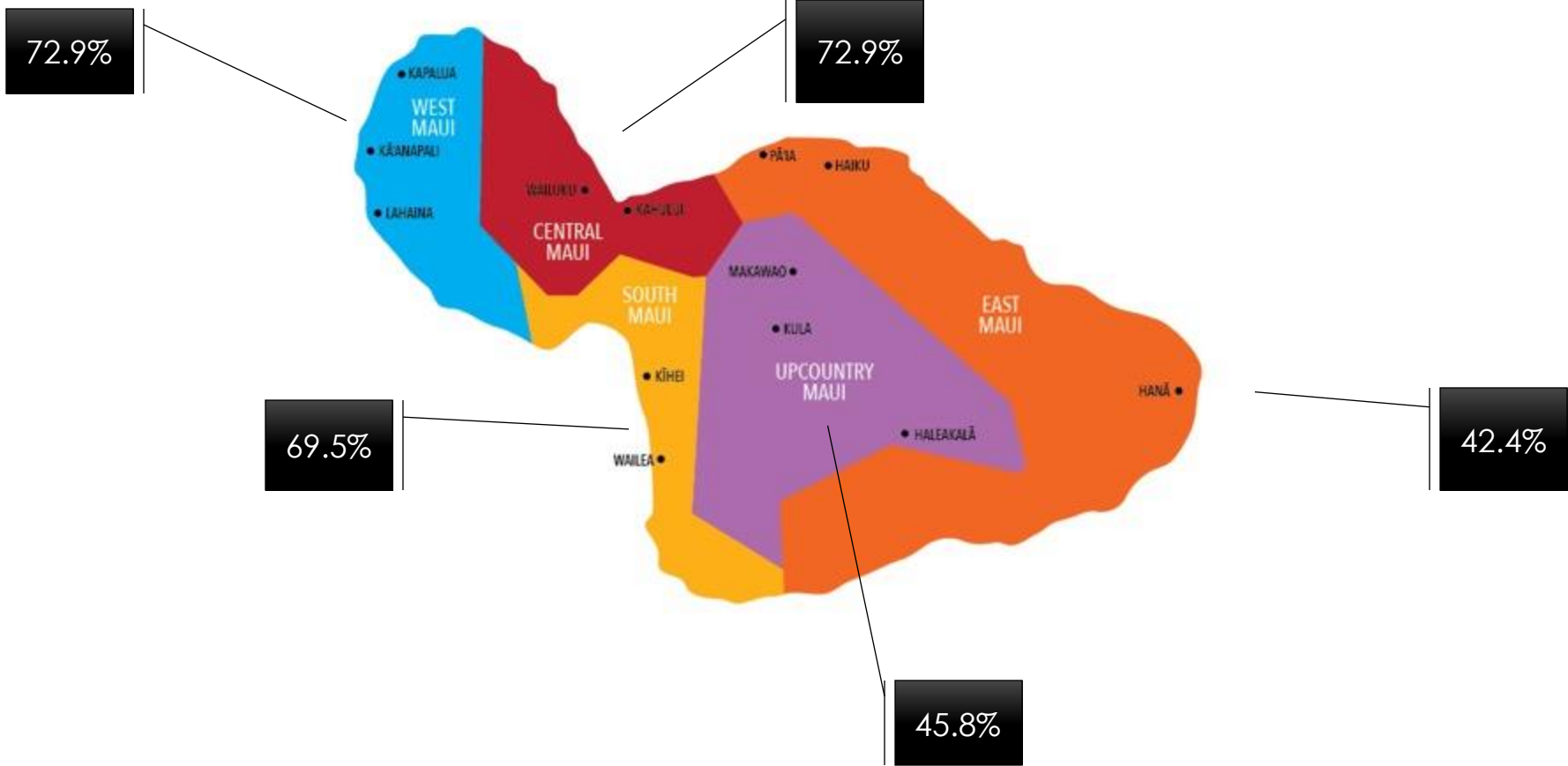
# AREAS VISITED - MAUI U.S. WEST



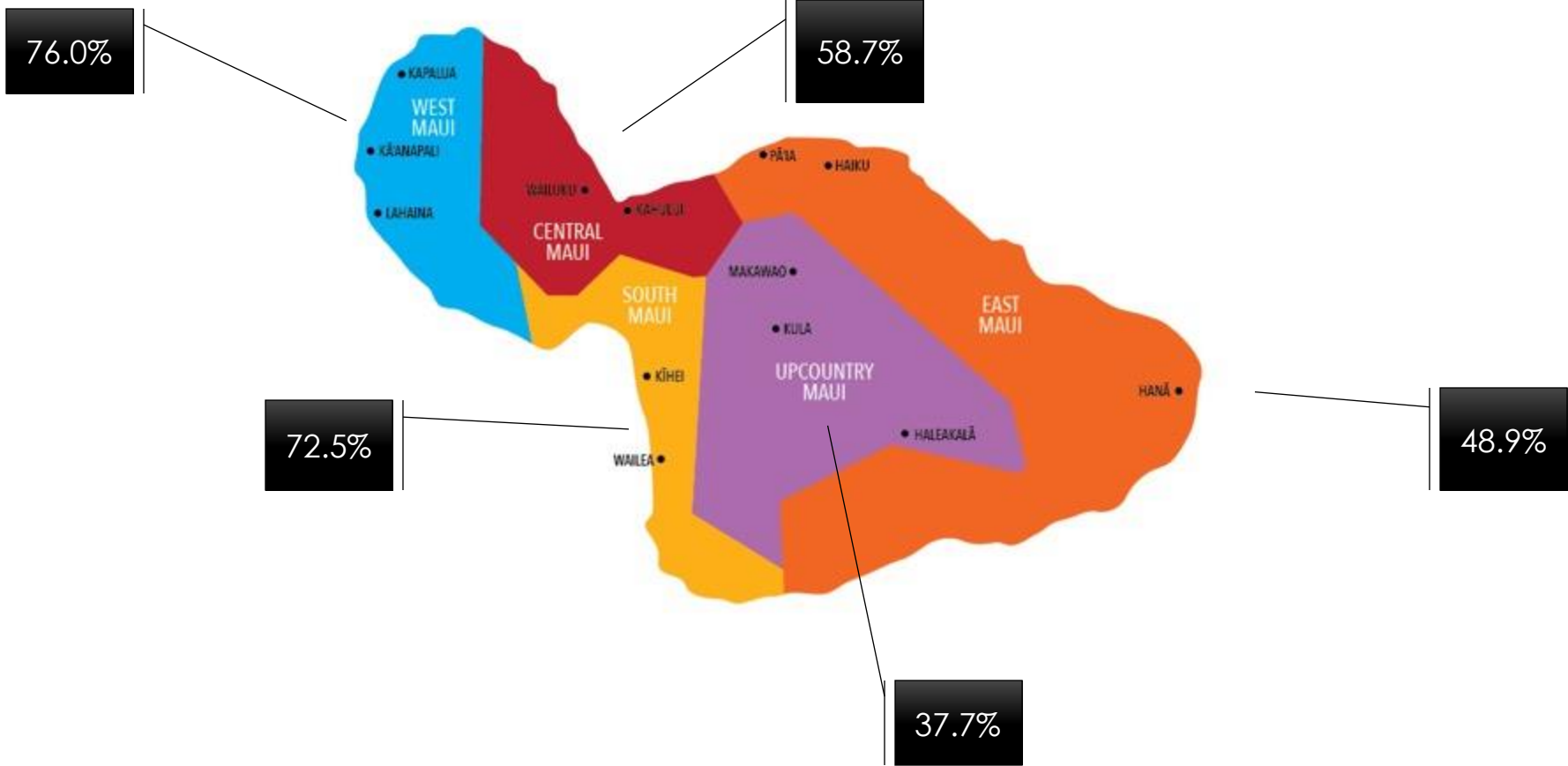
# AREAS VISITED - MAUI U.S. EAST



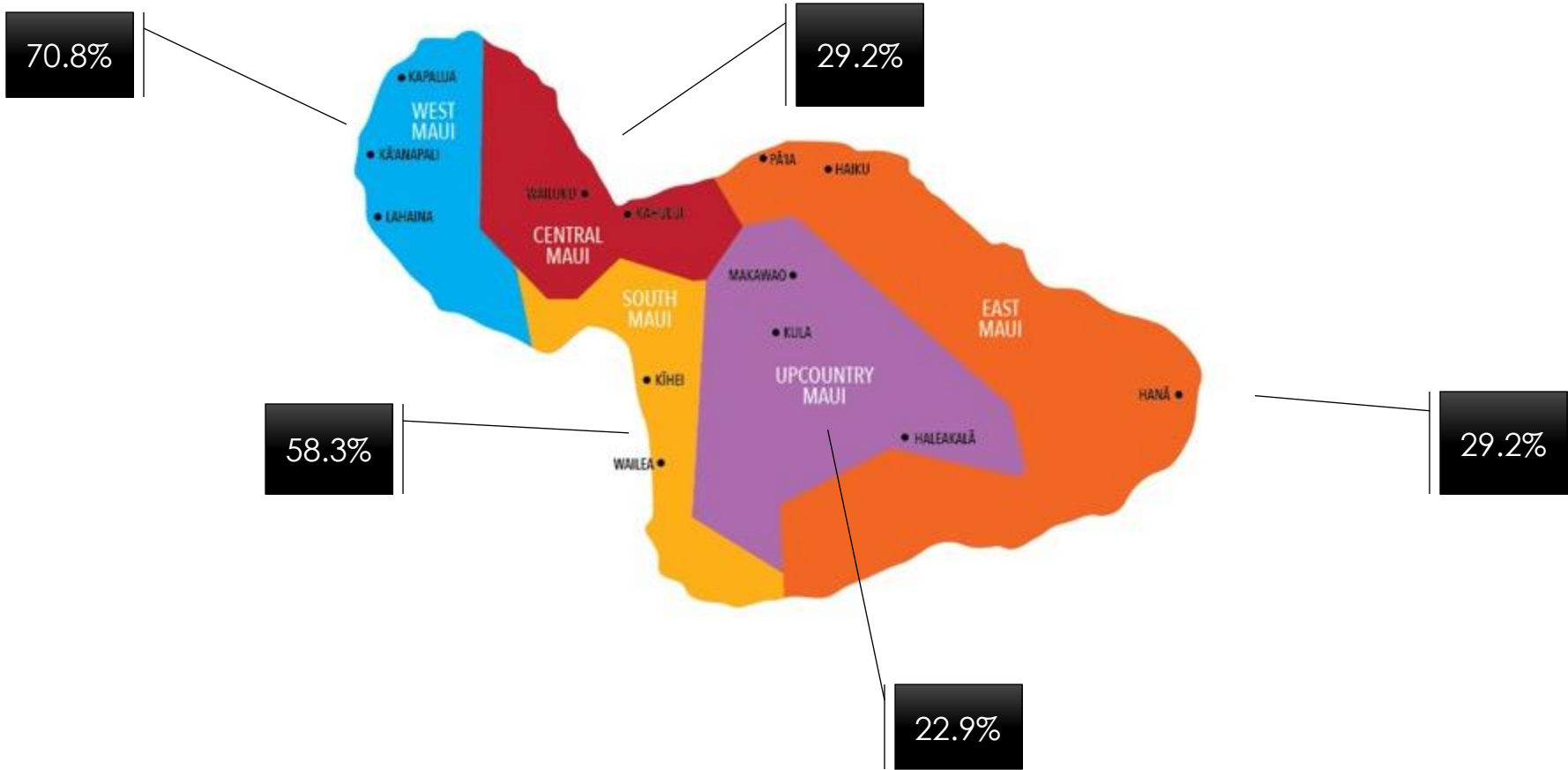
# AREAS VISITED - MAUI JAPAN



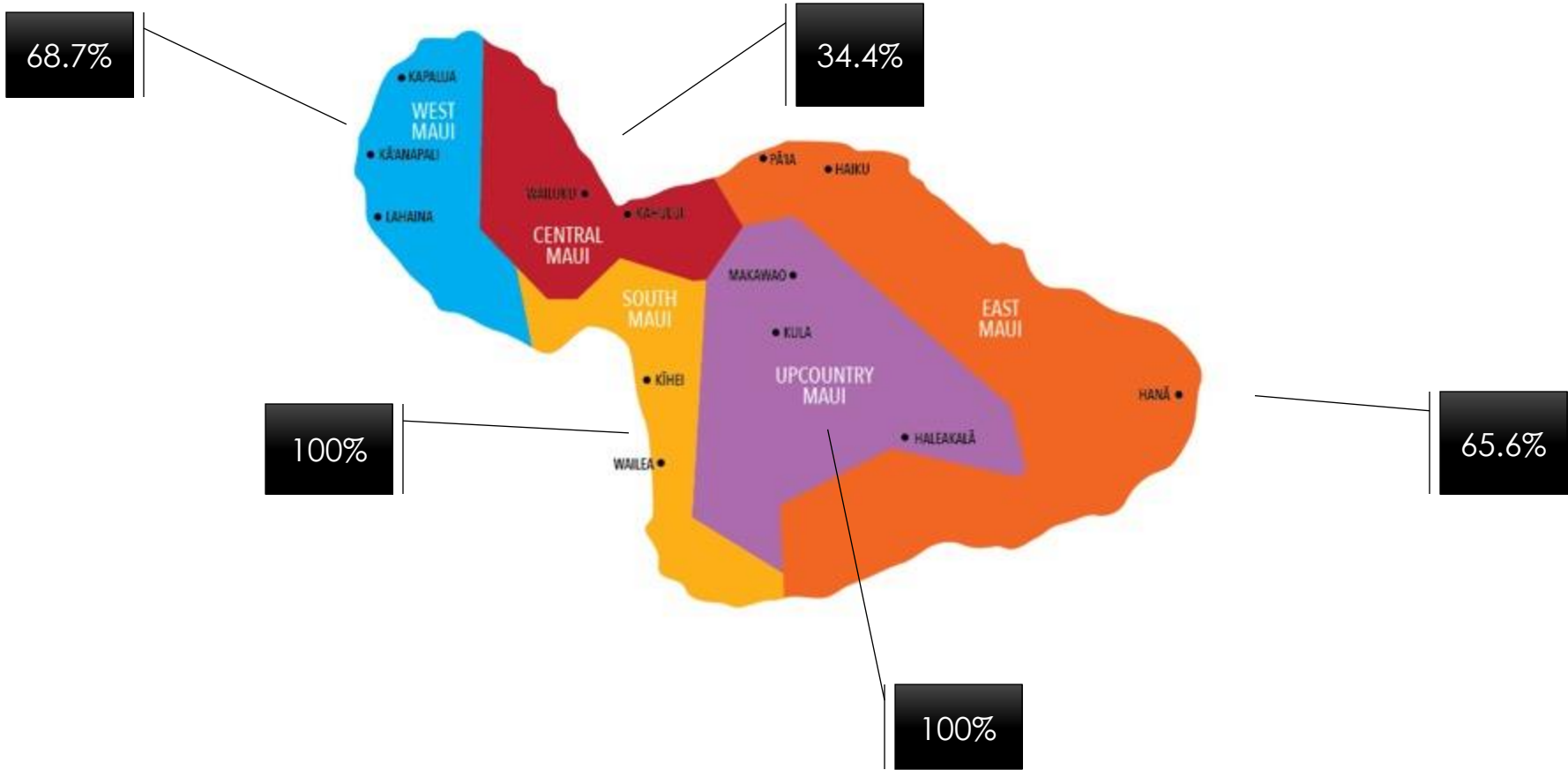
# AREAS VISITED - MAUI CANADA



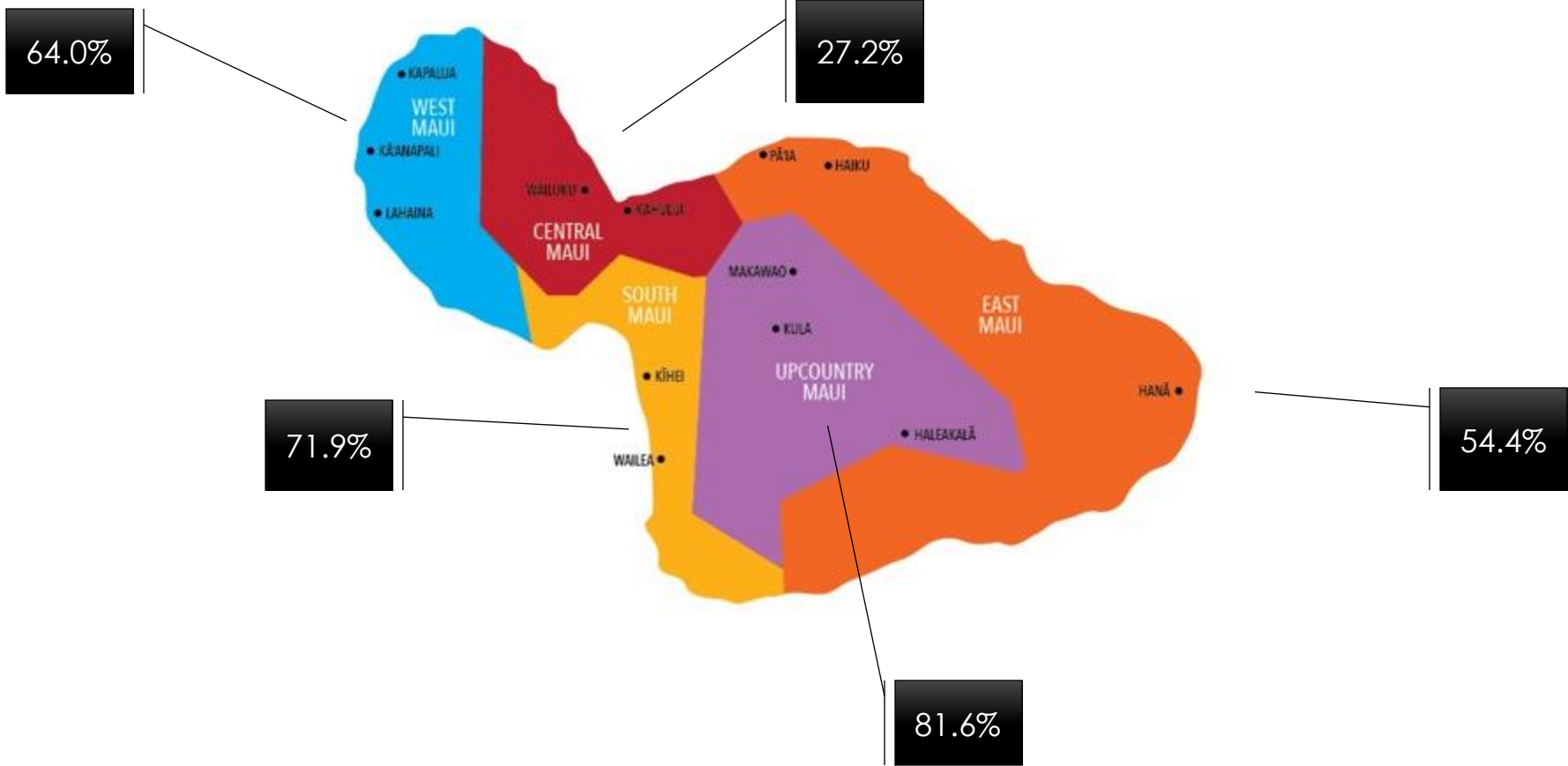
# AREAS VISITED - MAUI OCEANIA



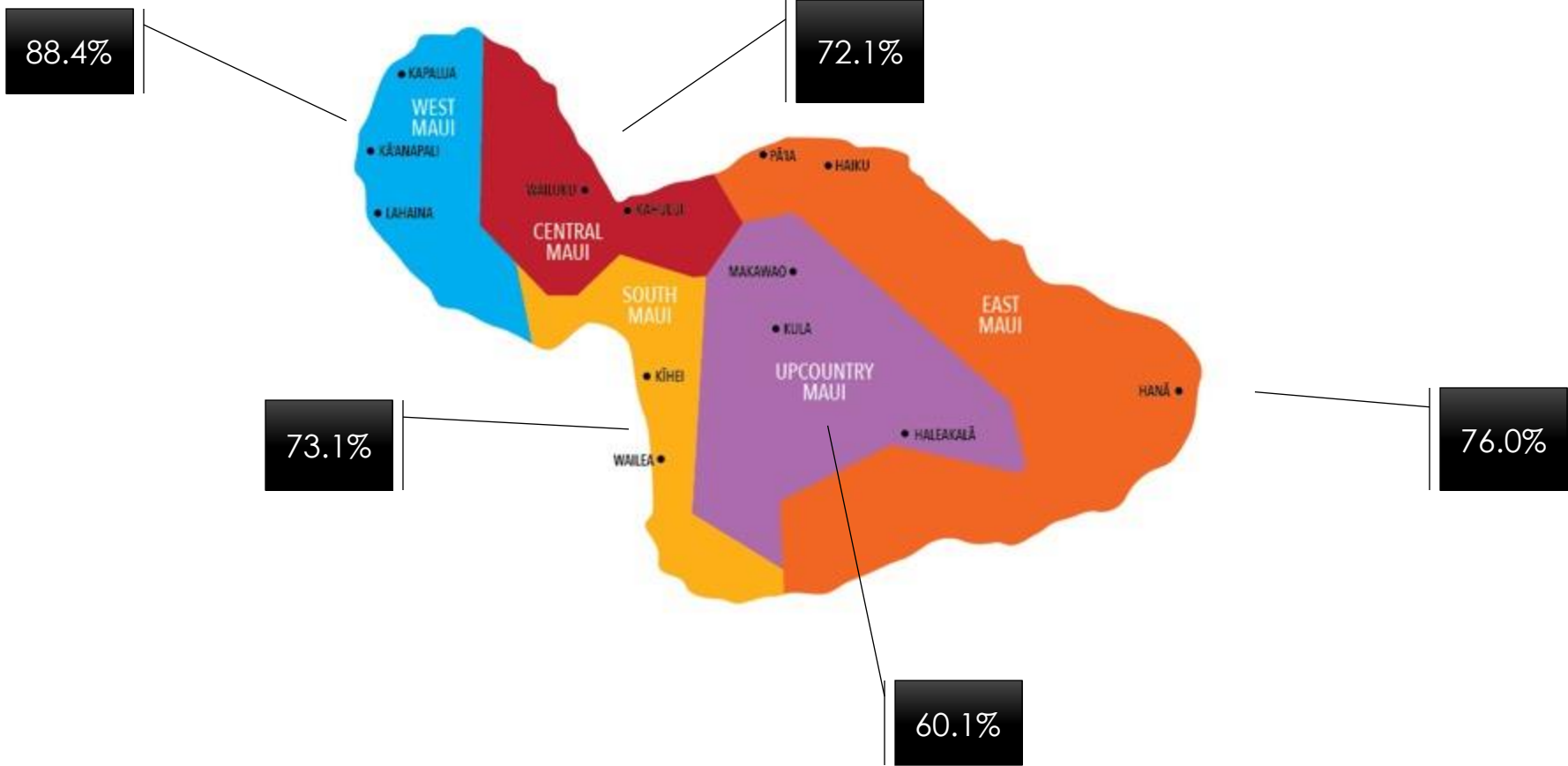
# AREAS VISITED - MAUI CHINA



# AREAS VISITED - MAUI KOREA



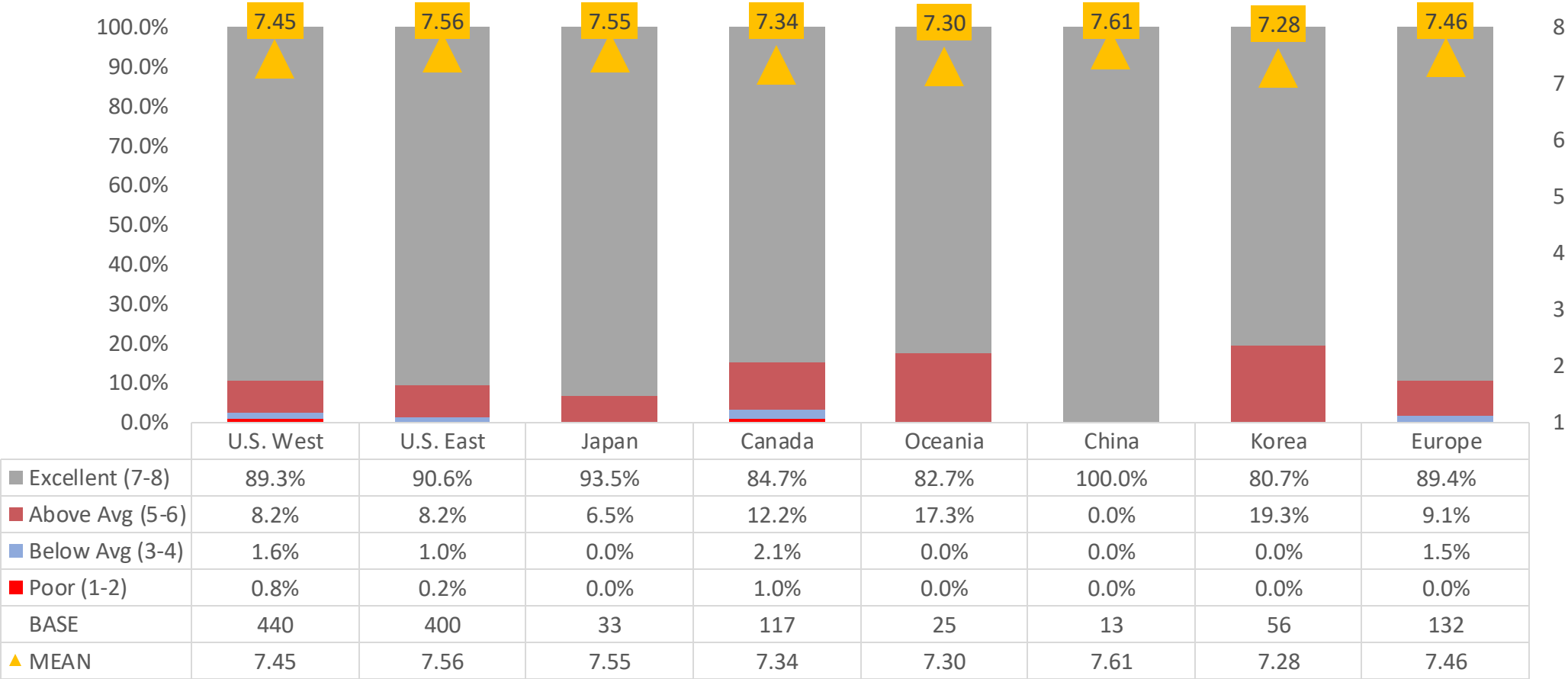
# AREAS VISITED - MAUI EUROPE



# Section 10 – Island of Hawai‘i

# SATISFACTION - ISLAND OF HAWAI‘I

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

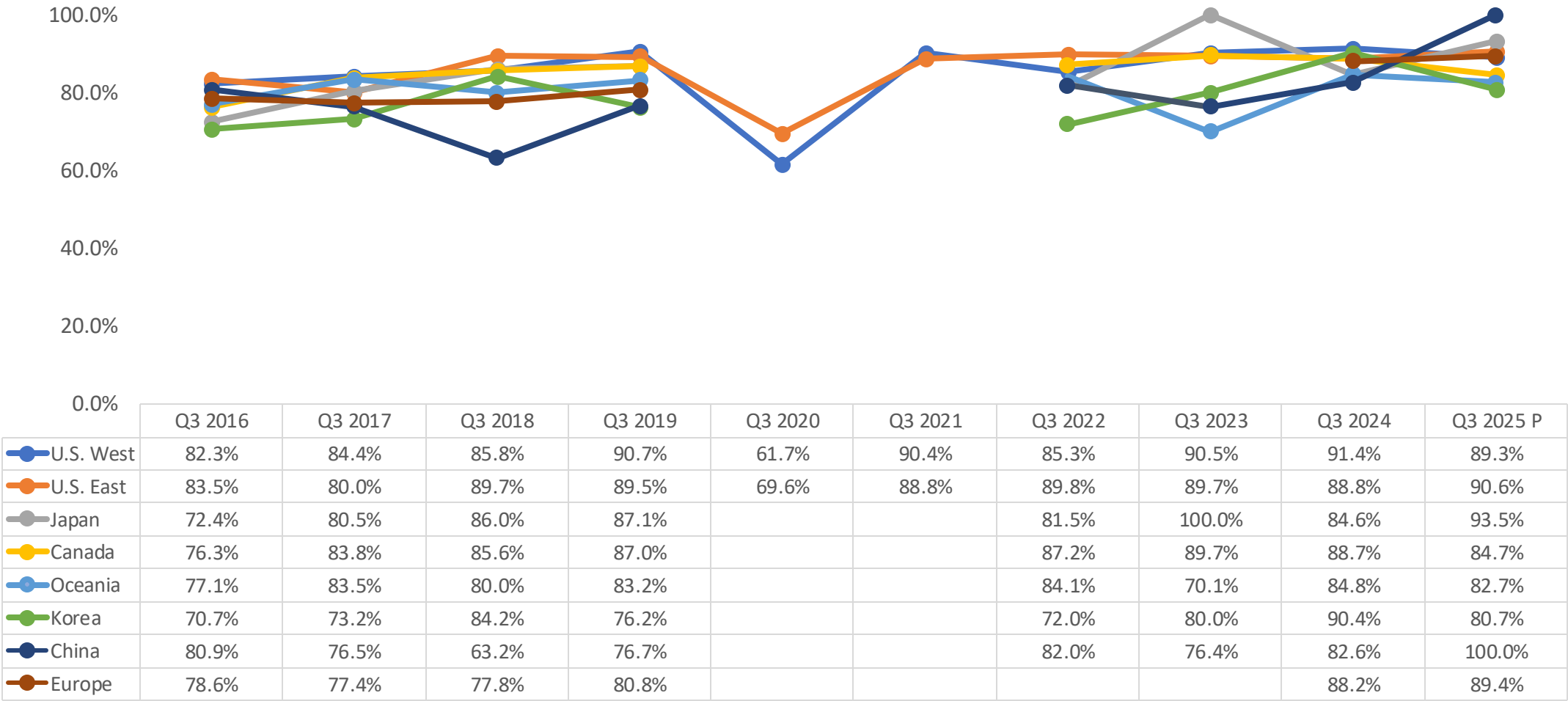


# SATISFACTION - ISLAND OF HAWAI'I

- ***Islands visited:*** Visitors from **U.S. West** whose trip was to the Island of Hawai'i only 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.

# SATISFACTION - ISLAND OF HAWAI‘I

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



P= Preliminary Data

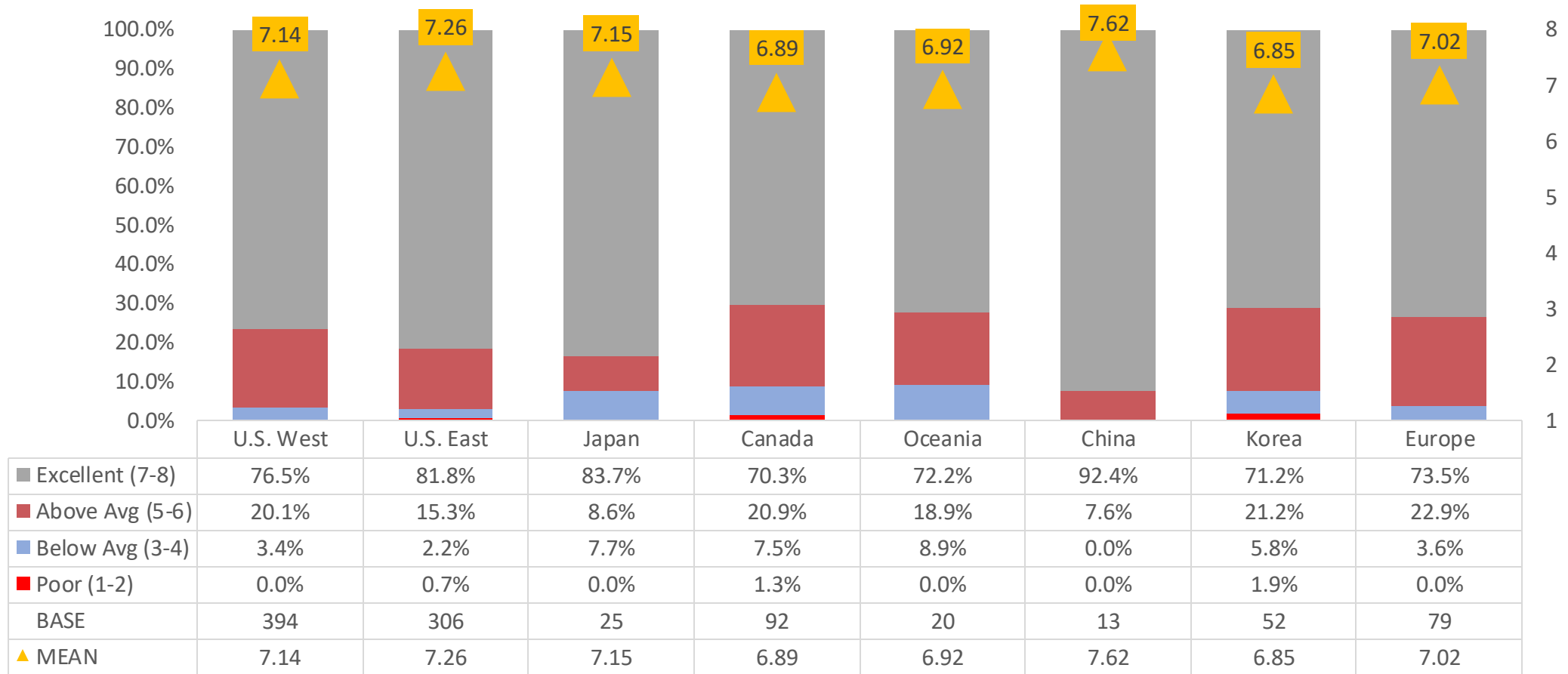
Q. How would you rate your most recent trip to the state of Hawai‘i? How would you rate your experience on\_\_\_?

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.



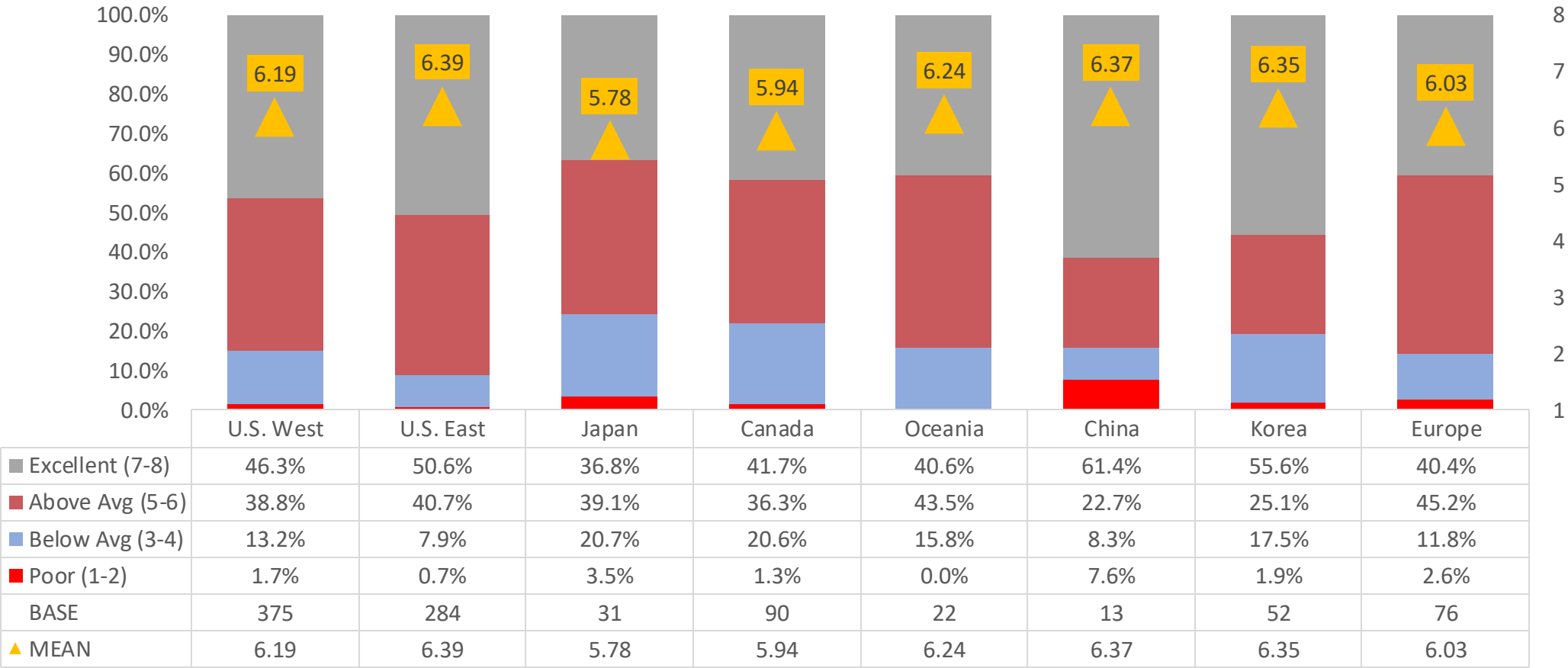
# ENTERTAINMENT/ ATTRACTIONS - ISLAND OF HAWAI'I

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



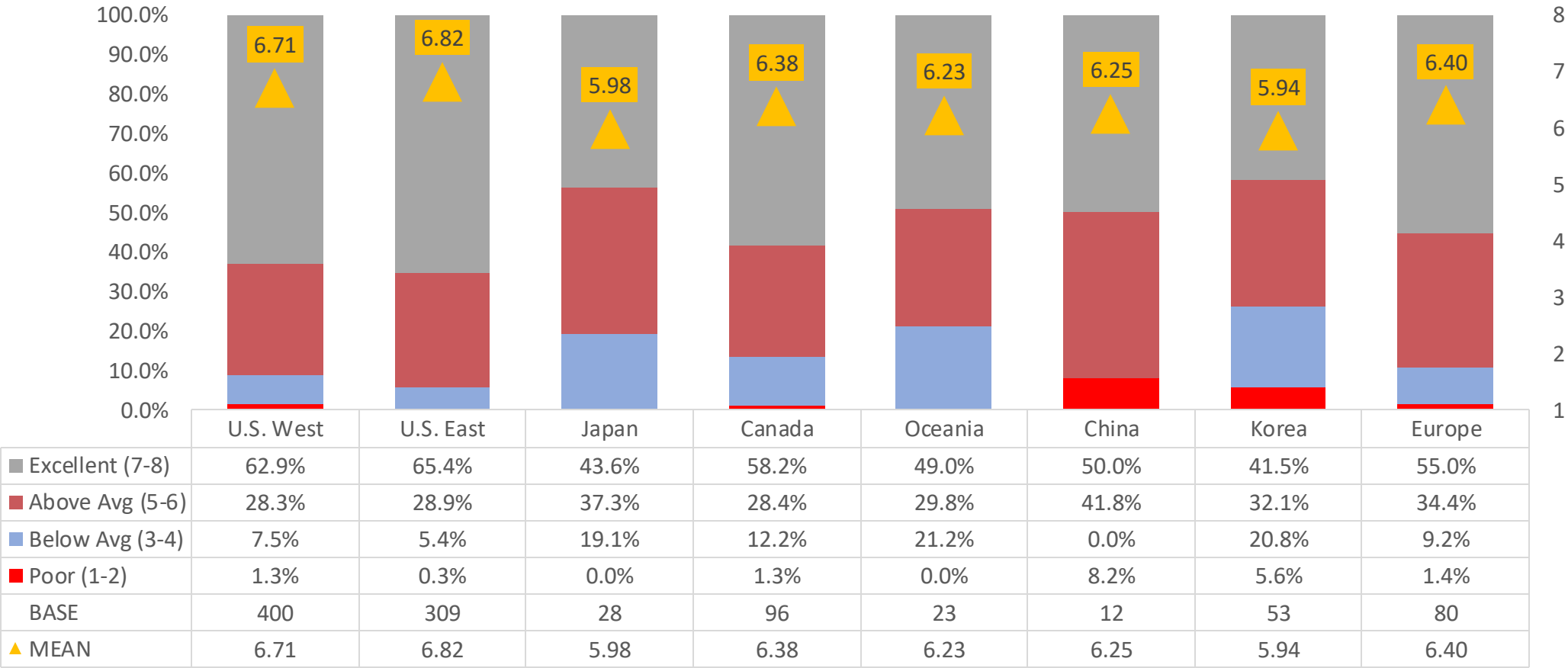
# SHOPPING - ISLAND OF HAWAI‘I

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



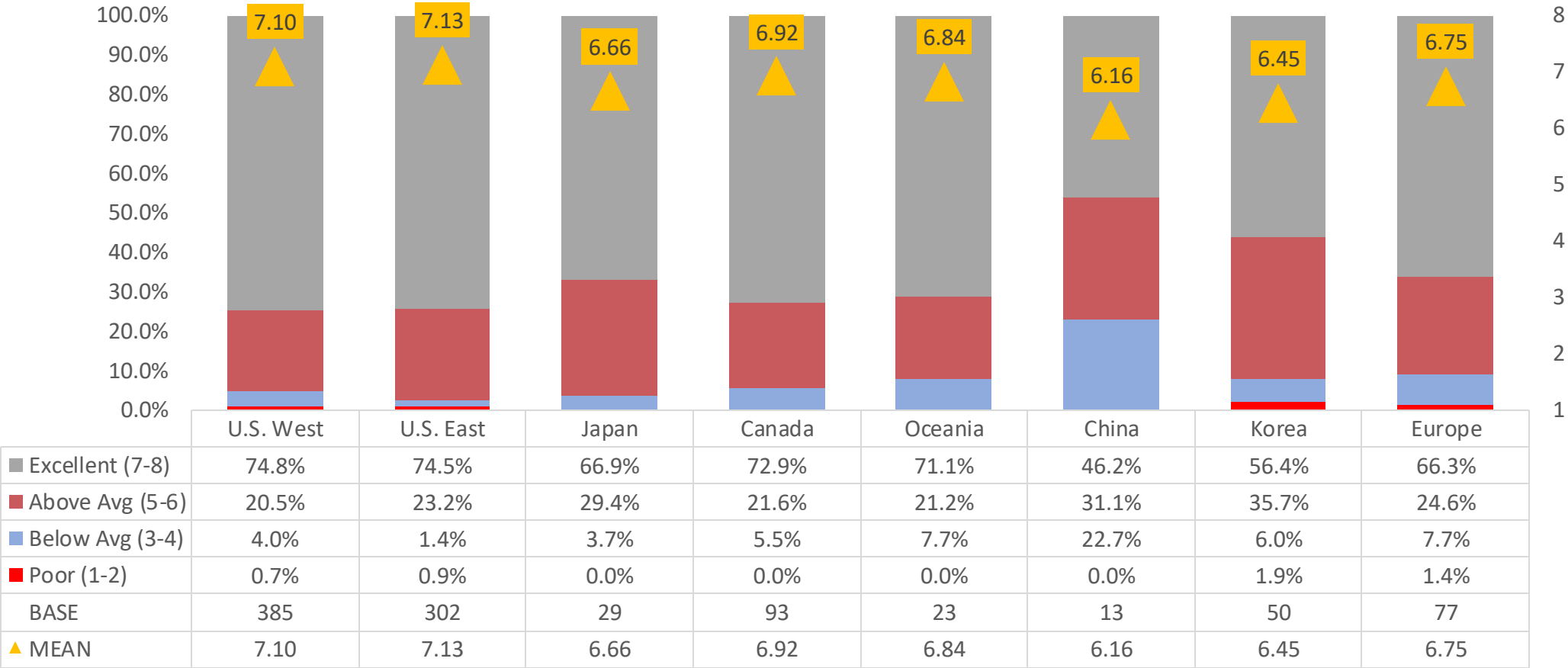
# DINING/ FOOD & BEVERAGE - ISLAND OF HAWAI‘I

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



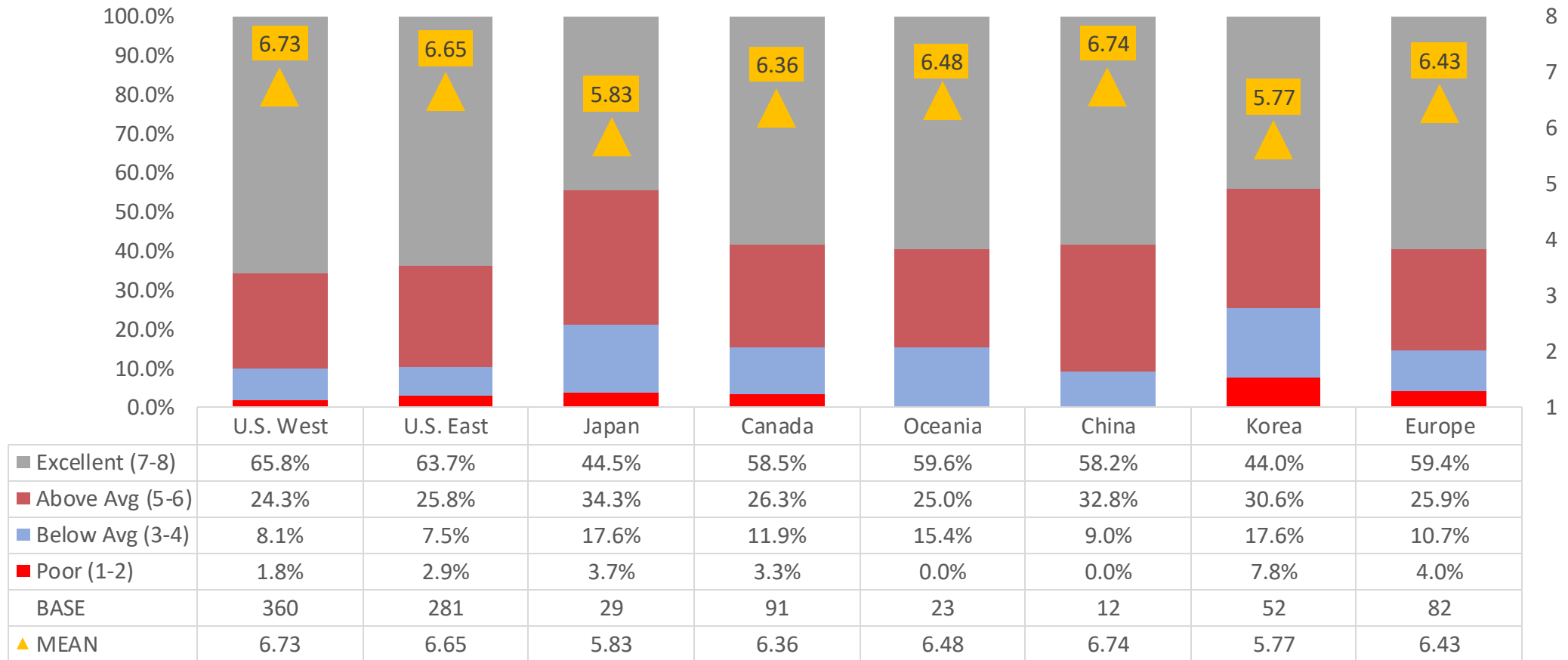
# LODGING/ ACCOMMODATIONS - ISLAND OF HAWAI‘I

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



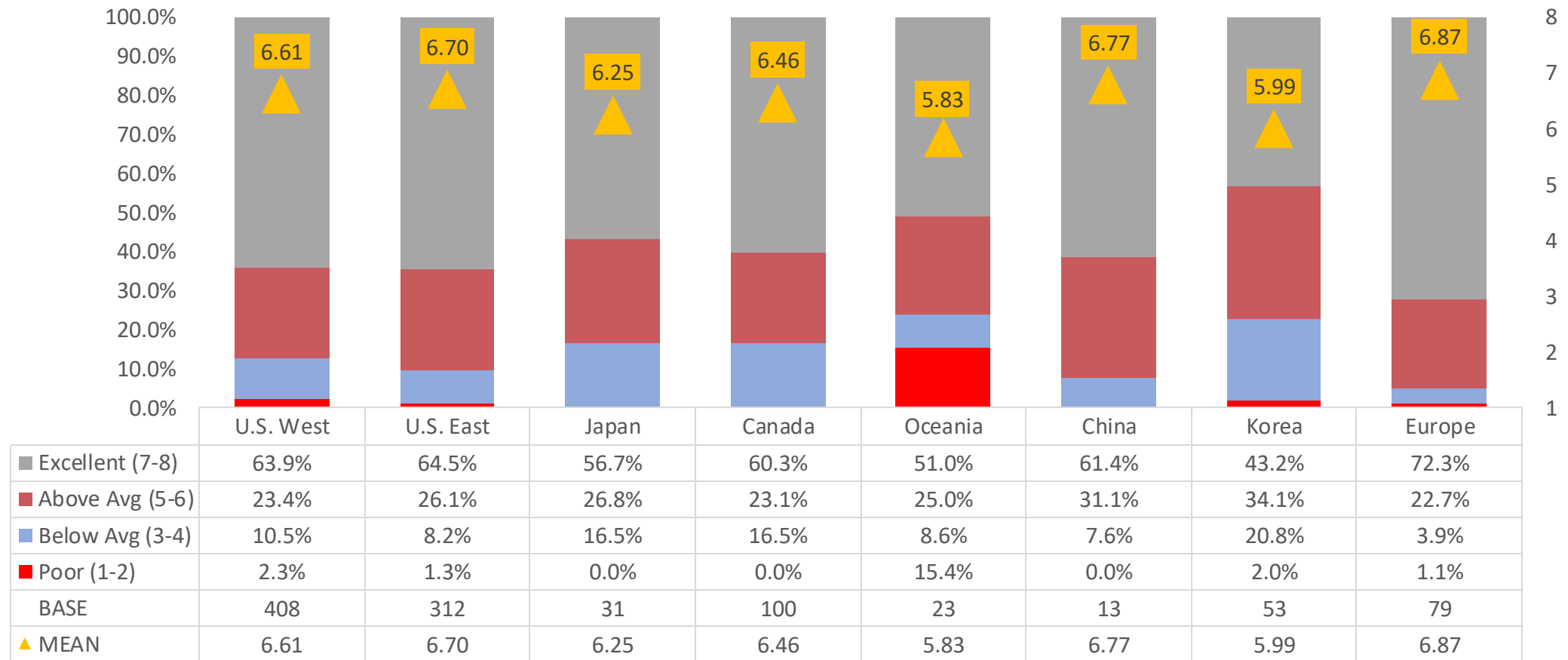
# TRANSPORTATION ON ISLAND - ISLAND OF HAWAI'I

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



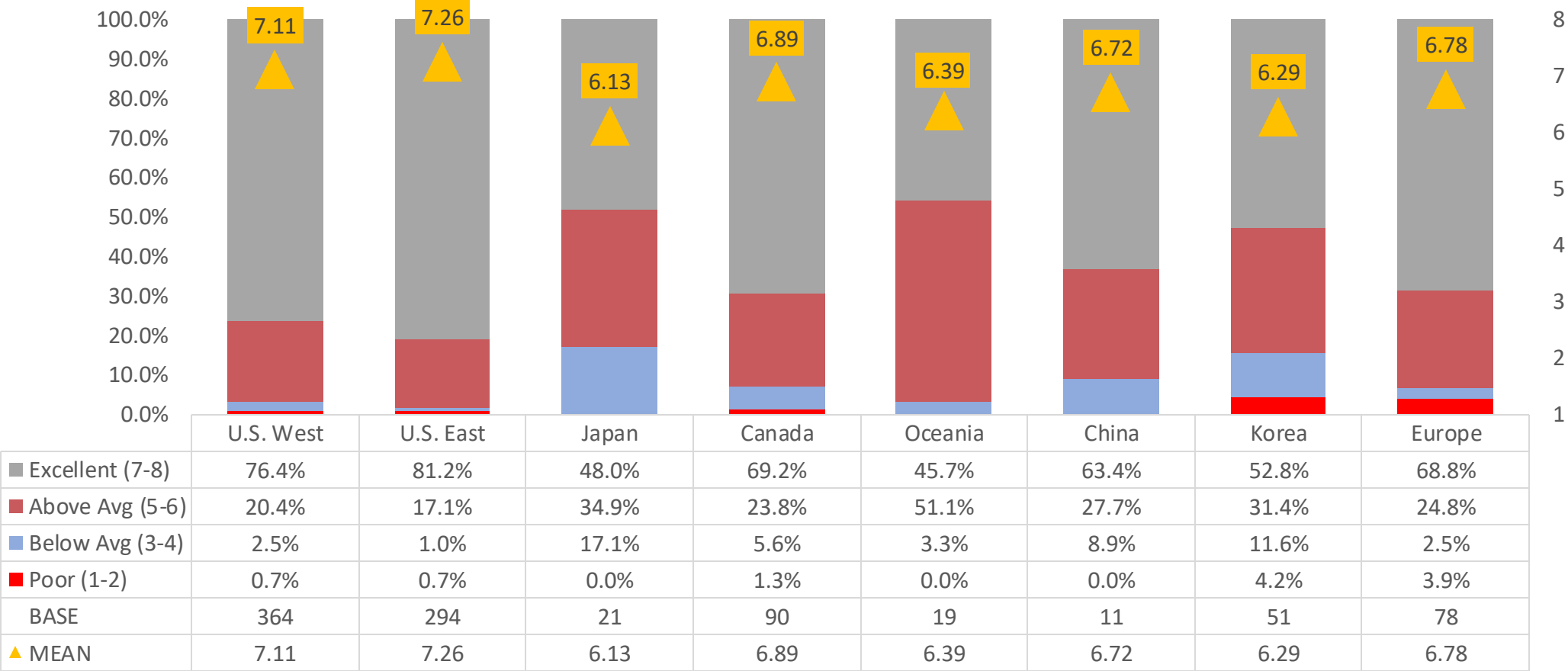
# AIRPORT - ISLAND OF HAWAI'I

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



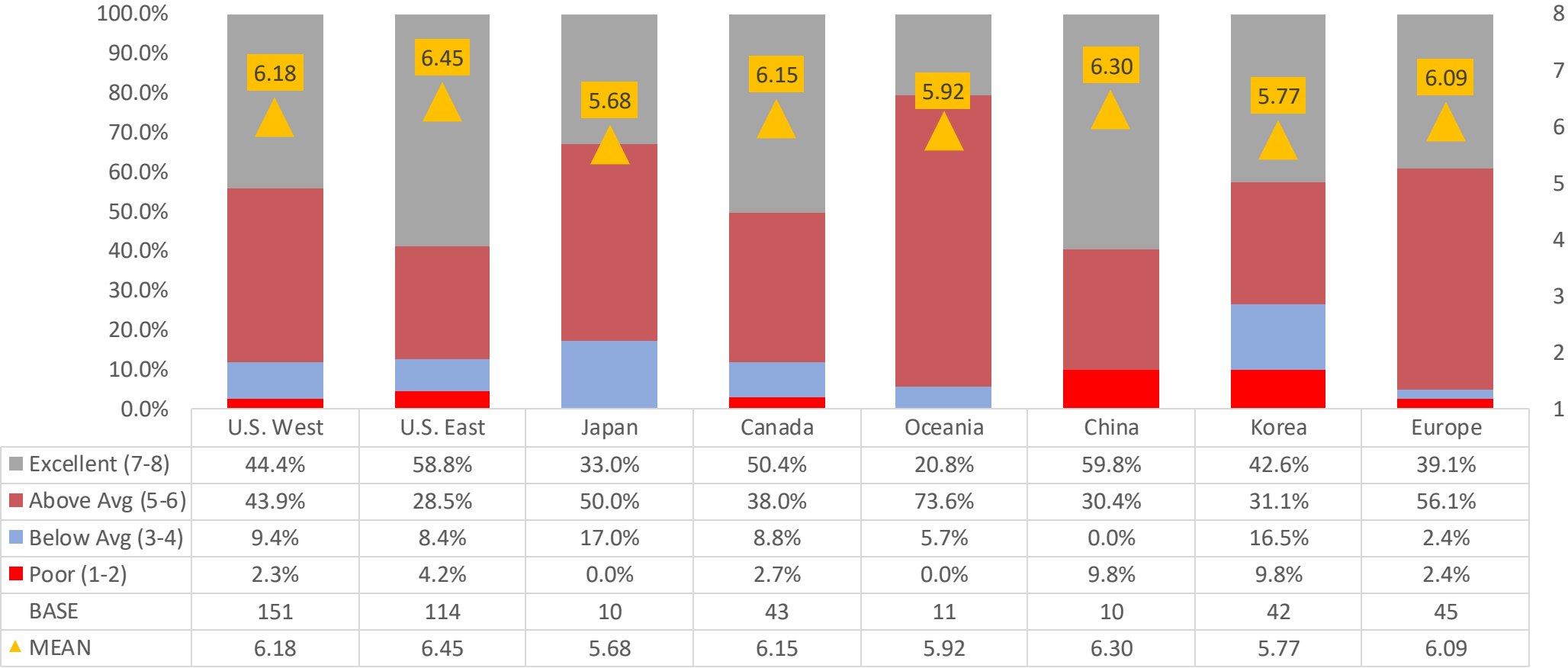
# CULTURAL EXPERIENCES ON ISLAND - ISLAND OF HAWAI‘I

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



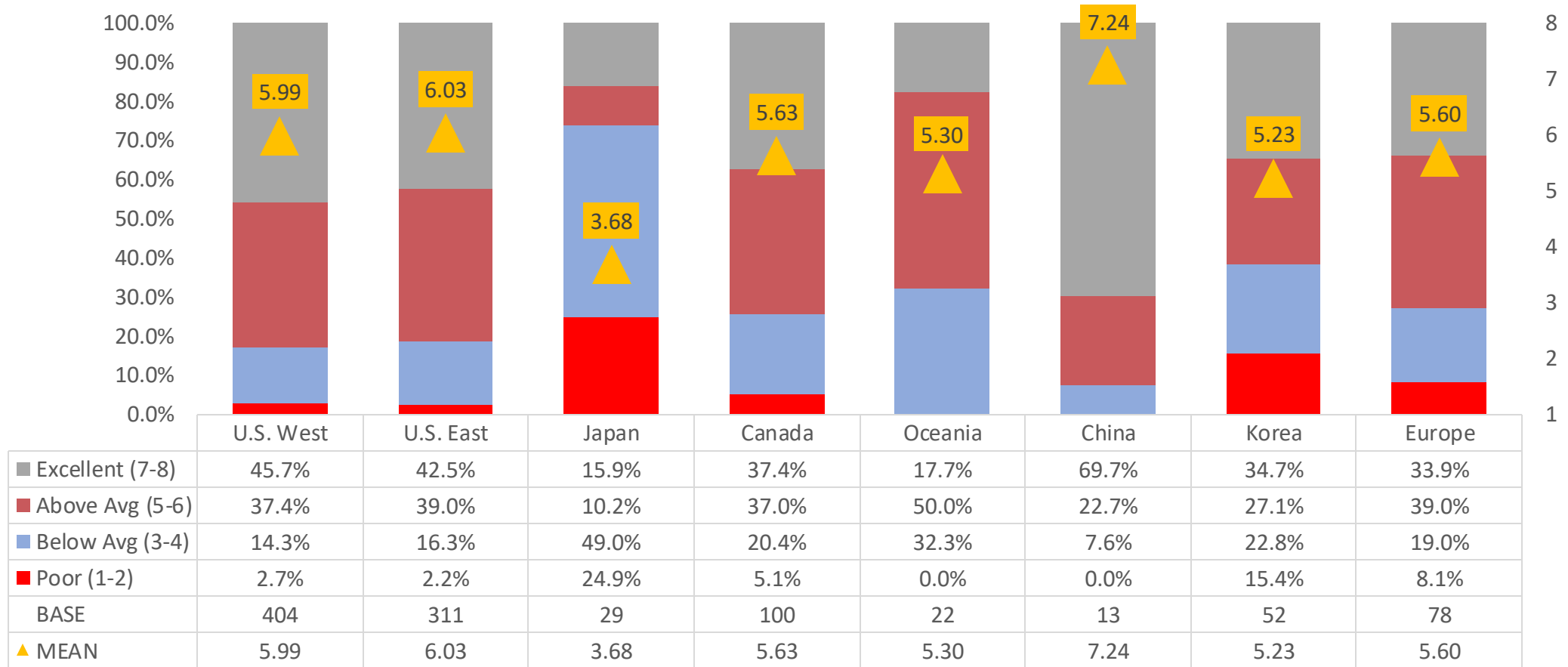
# VOLUNTEER EXPERIENCES ON ISLAND - ISLAND OF HAWAI‘I

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



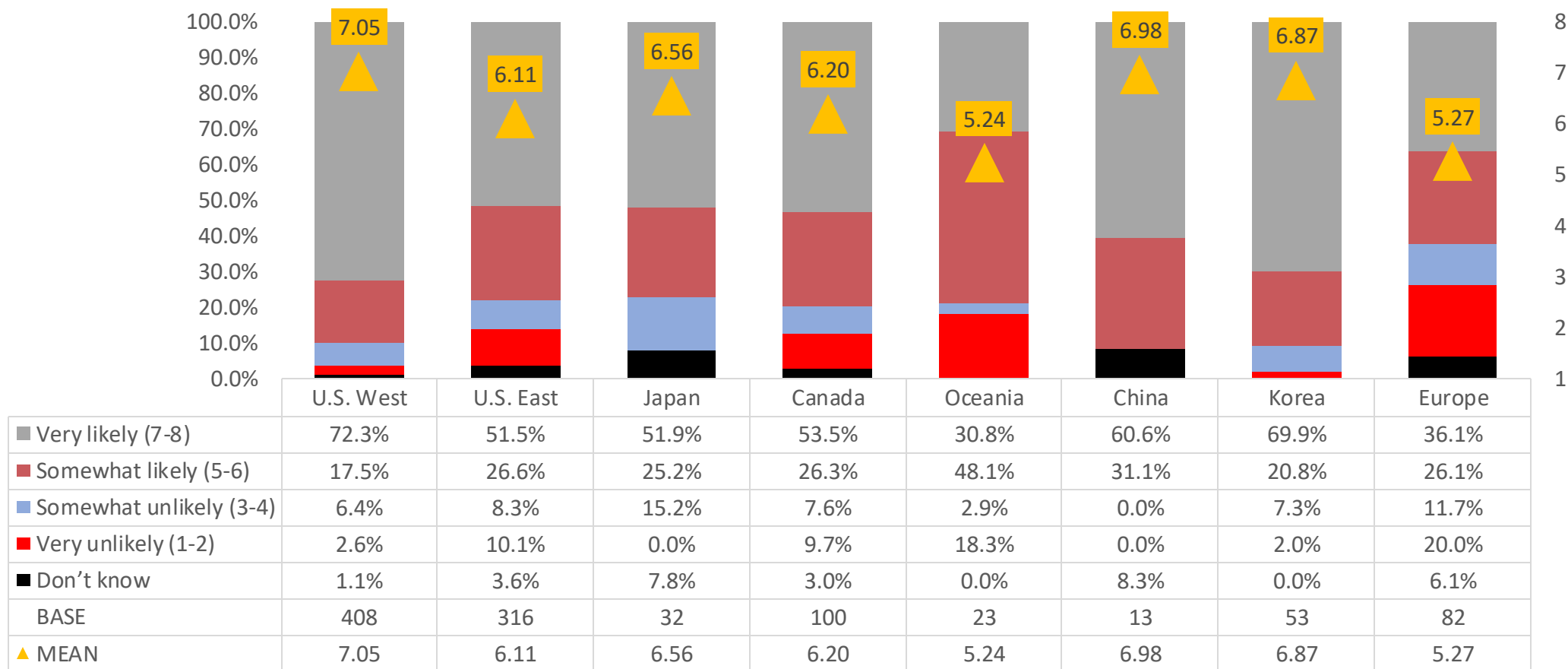
# VALUE FOR THE MONEY ON ISLAND - ISLAND OF HAWAI'I

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



# LIKELIHOOD OF RETURN VISIT - ISLAND OF HAWAI'I

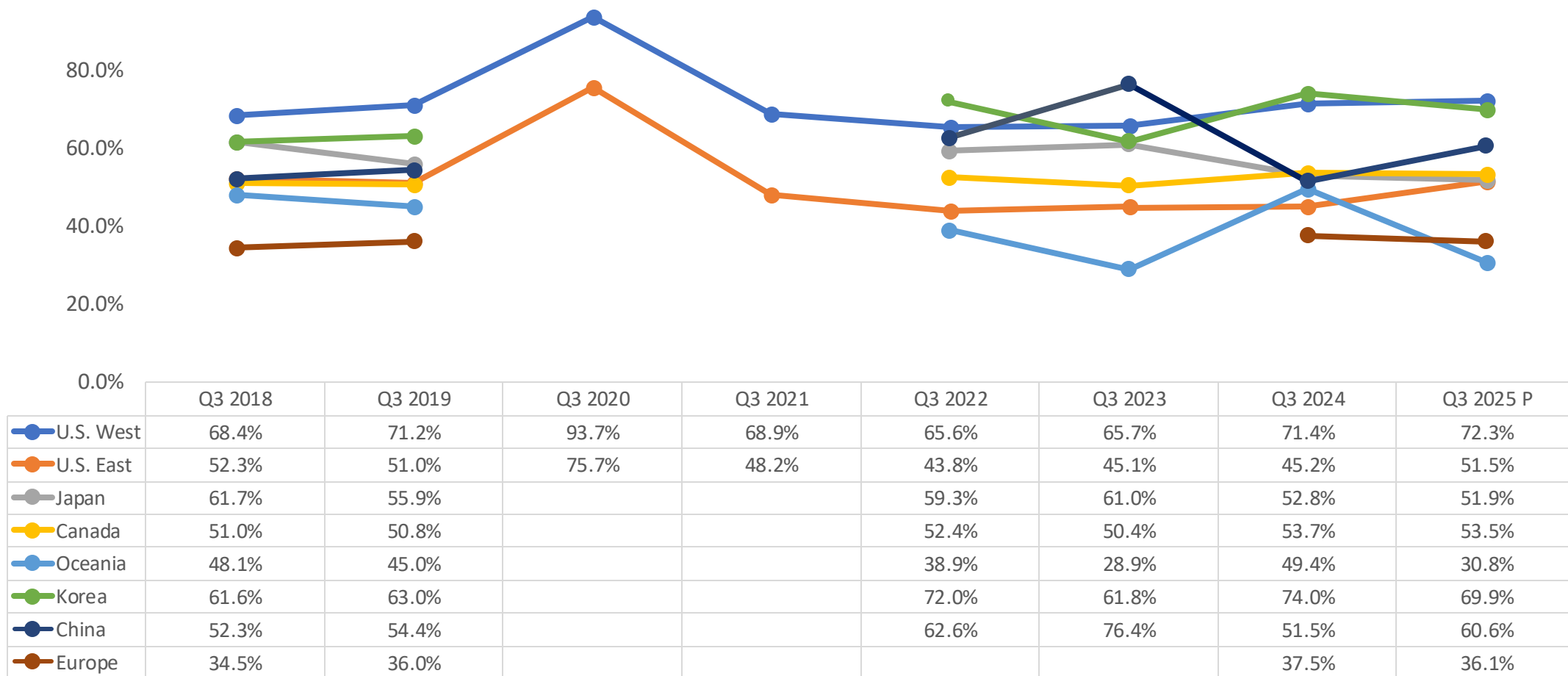
8-pt Rating Scale  
8=Very likely/ 1=Very unlikely



# 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%



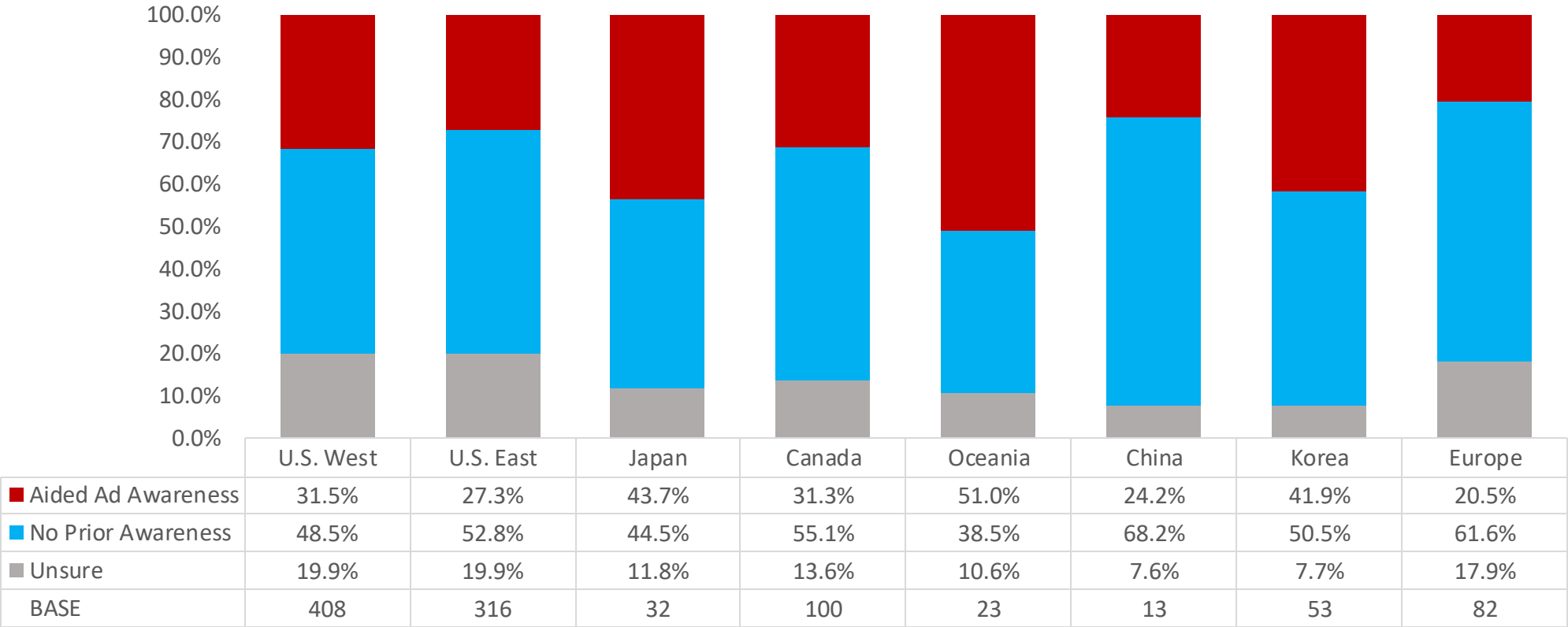
P= Preliminary Data

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.



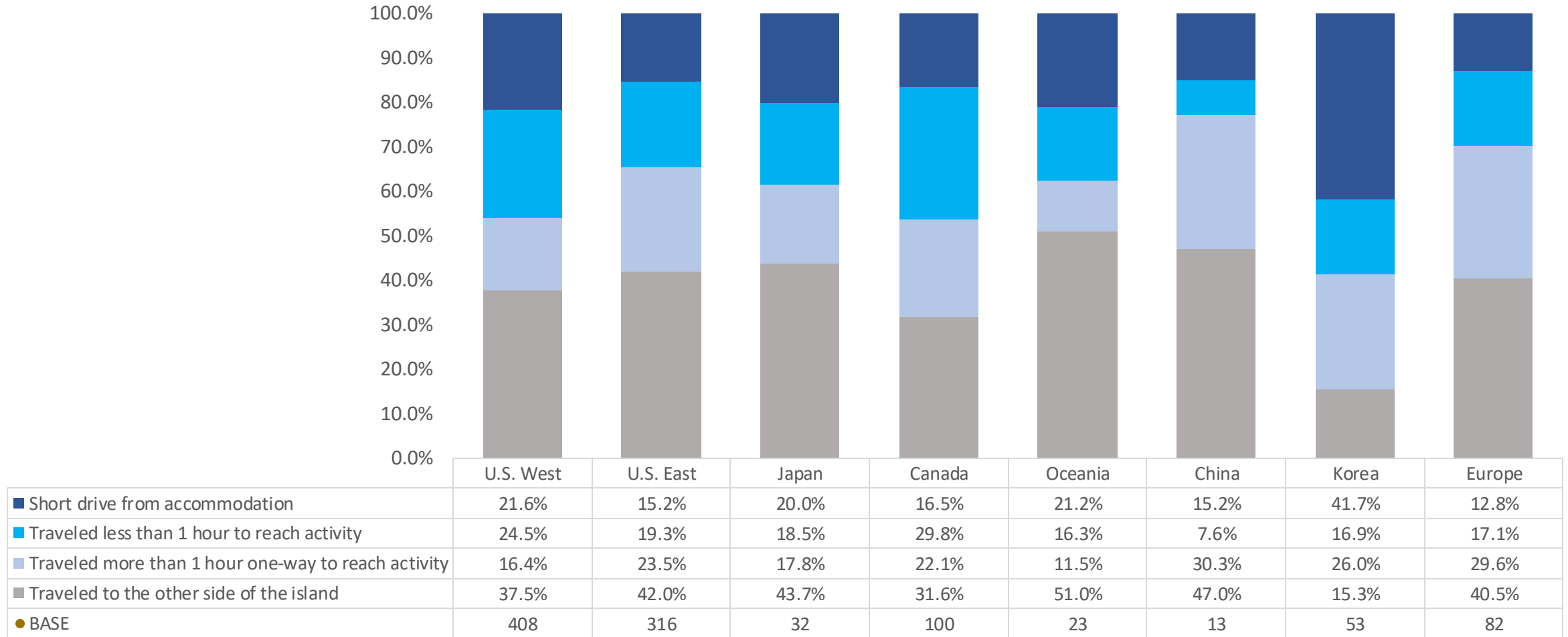
# AIDED ADVERTISING AWARENESS - ISLAND OF HAWAI‘I



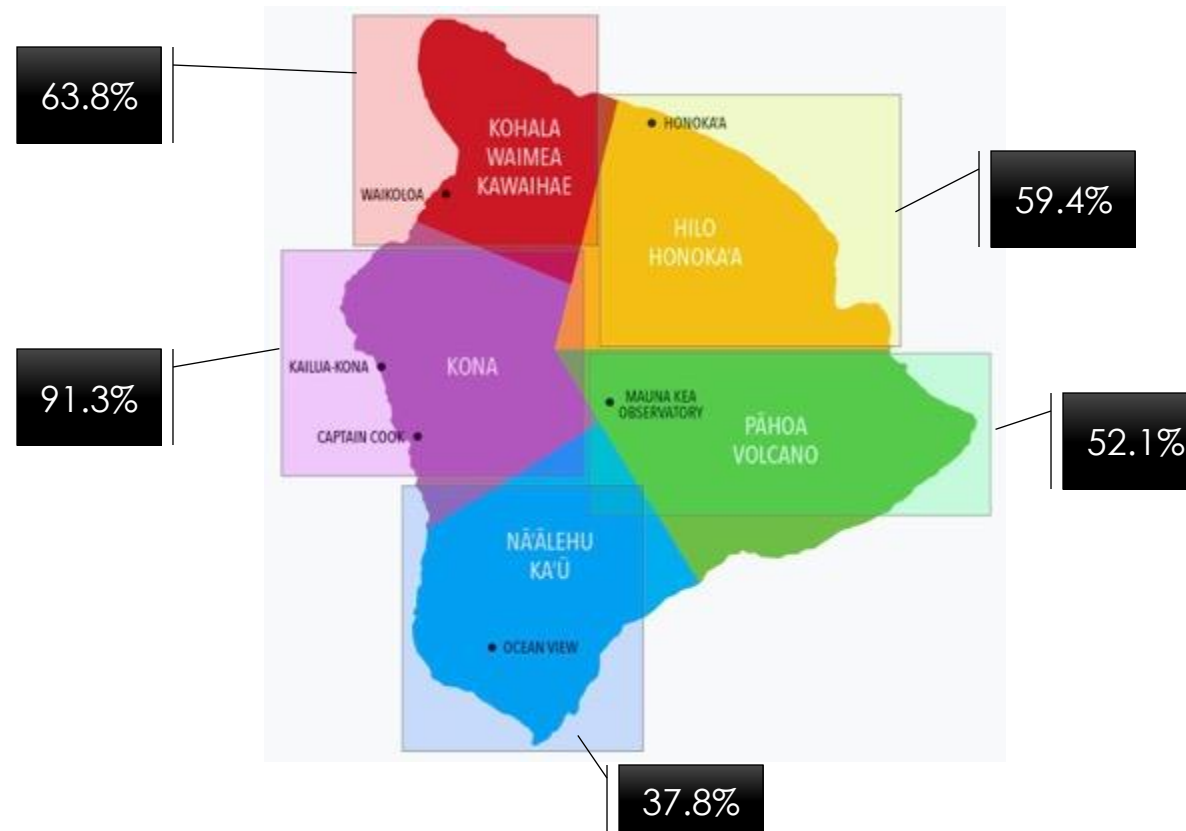
# MOTIVATING FACTORS – ISLAND OF HAWAI‘I

|  | U.S. West | U.S. East | Japan | Canada | Oceania | China | Korea | Europe |
|--|-----------|-----------|-------|--------|---------|-------|-------|--------|
| Television programs or movies filmed in Hawai‘i                        | 11.5%     | 13.3%     | 31.9% | 10.9%  | 16.3%   | 22.7% | 20.8% | 18.9%  |
| Hawaiian music   | 16.9%     | 13.9%     | 10.0% | 9.9%   | 2.9%    | 0.0%  | 2.0%  | 12.6%  |
| Social media posts and videos  | 17.9%     | 13.5%     | 37.8% | 21.5%  | 13.5%   | 15.2% | 26.6% | 19.1%  |
| Outdoor or sporting activities and events                              | 17.0%     | 15.6%     | 9.3%  | 19.0%  | 22.1%   | 15.2% | 22.4% | 14.7%  |
| Hawaiian cultural experiences and Hawaiian cultural events             | 27.2%     | 30.0%     | 12.6% | 26.2%  | 19.2%   | 31.1% | 2.0%  | 19.5%  |
| Famous landmarks or imagery/ natural beauty (beaches, mountains, etc.) | 56.1%     | 60.7%     | 66.3% | 52.8%  | 70.2%   | 76.5% | 54.5% | 65.8%  |
| Attend a festival or other event                                       | 4.8%      | 2.1%      | 3.3%  | 3.9%   | 5.8%    | 7.6%  | 3.8%  | 4.8%   |
| BASE   | 408       | 316       | 32    | 100    | 23      | 13    | 53    | 82     |

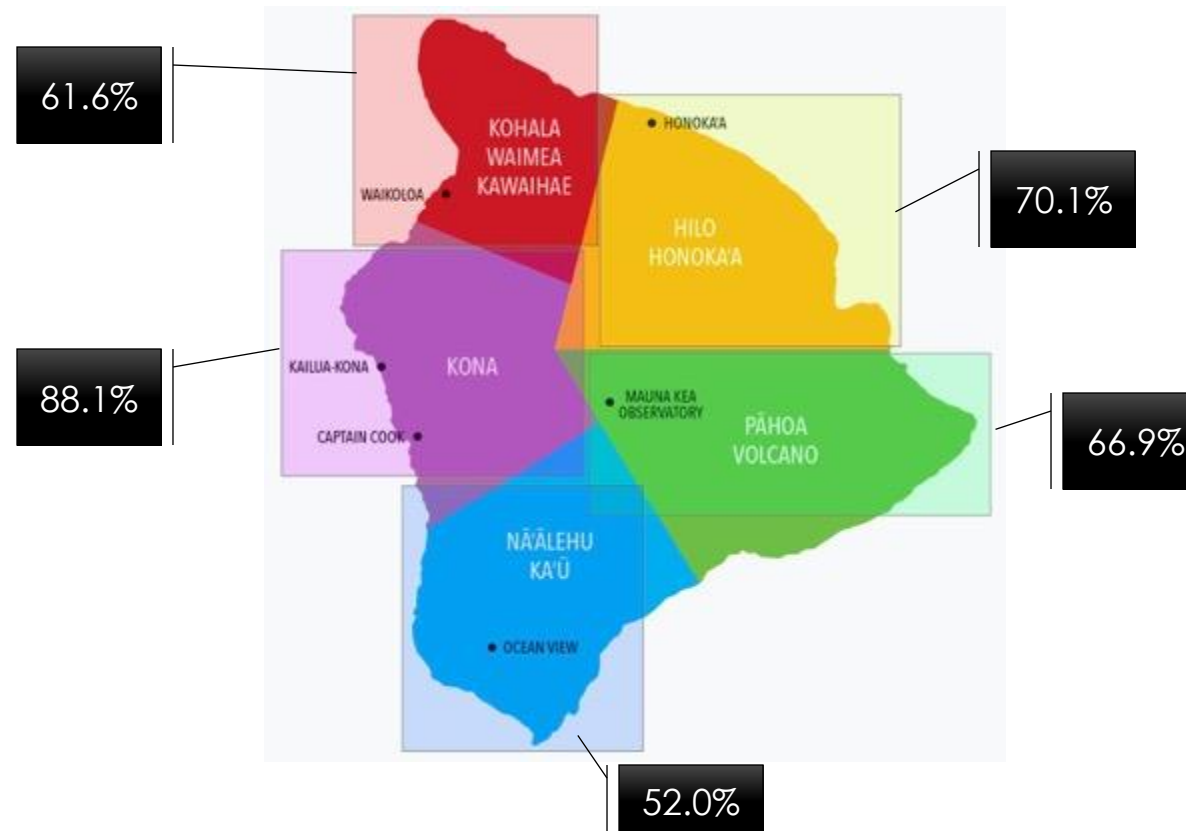
# TRAVEL ON ISLAND OF HAWAI'I



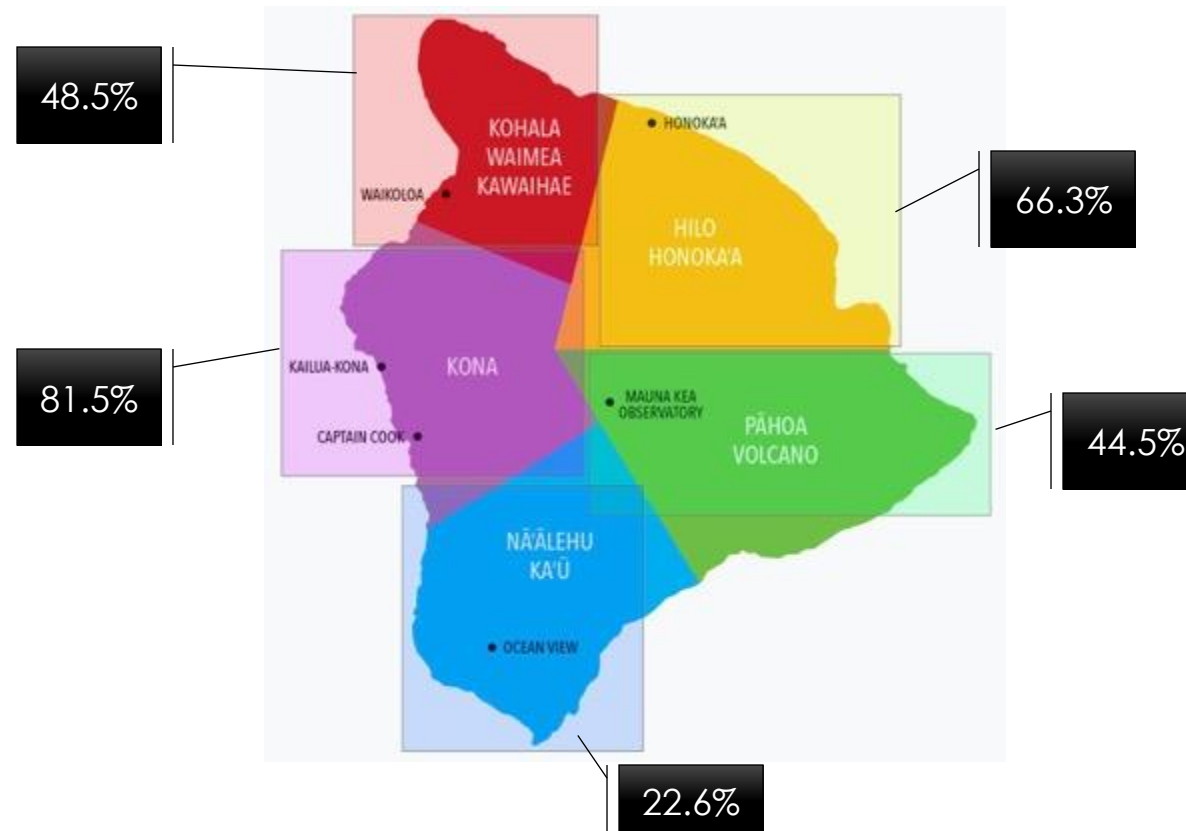
# AREAS VISITED - ISLAND OF HAWAI'I U.S. WEST



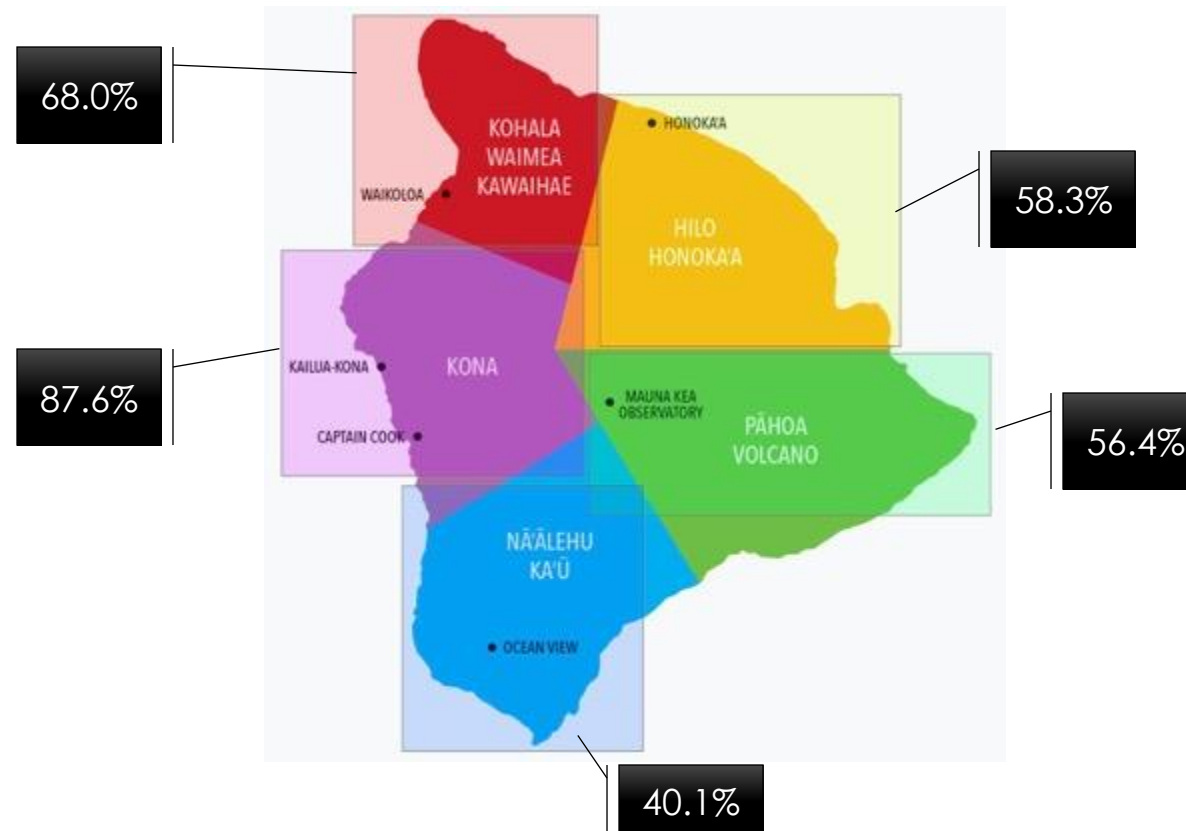
# AREAS VISITED - ISLAND OF HAWAI'I U.S. EAST



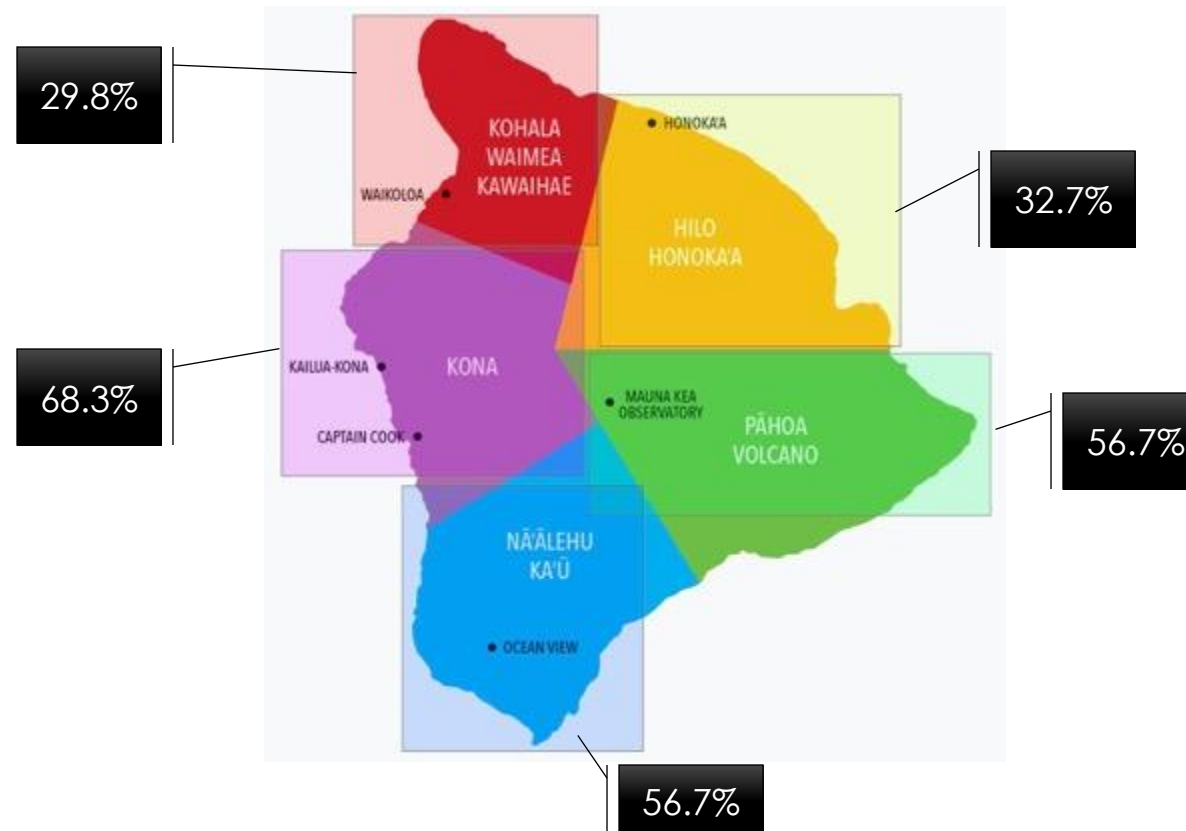
# AREAS VISITED - ISLAND OF HAWAI'I JAPAN



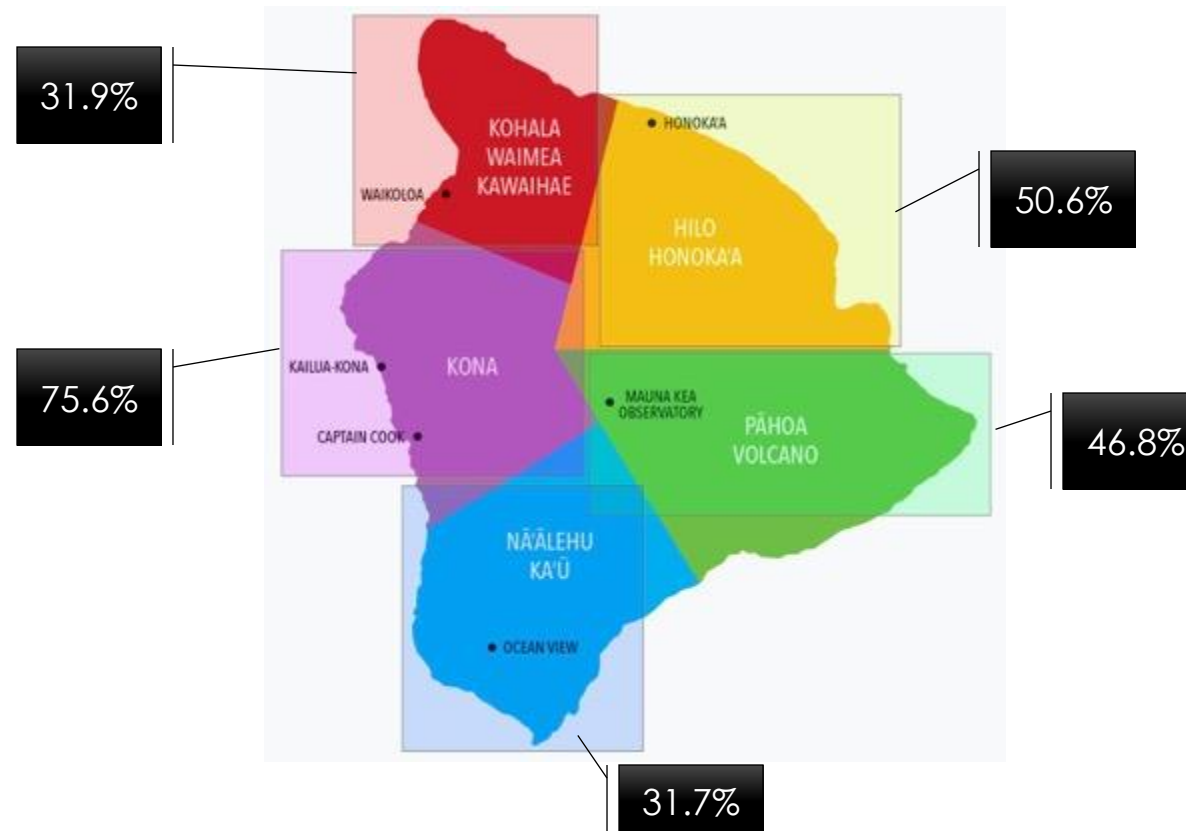
# AREAS VISITED - ISLAND OF HAWAI'I CANADA



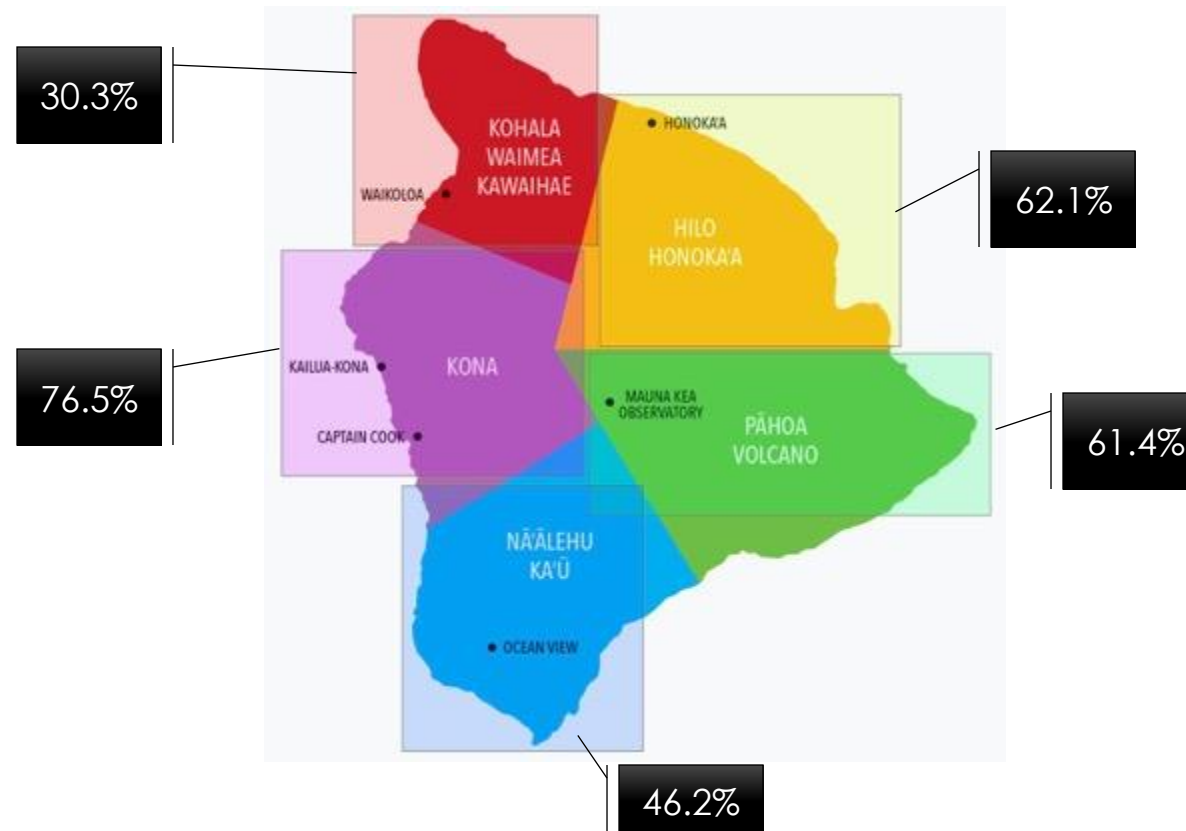
# AREAS VISITED - ISLAND OF HAWAI'I OCEANIA



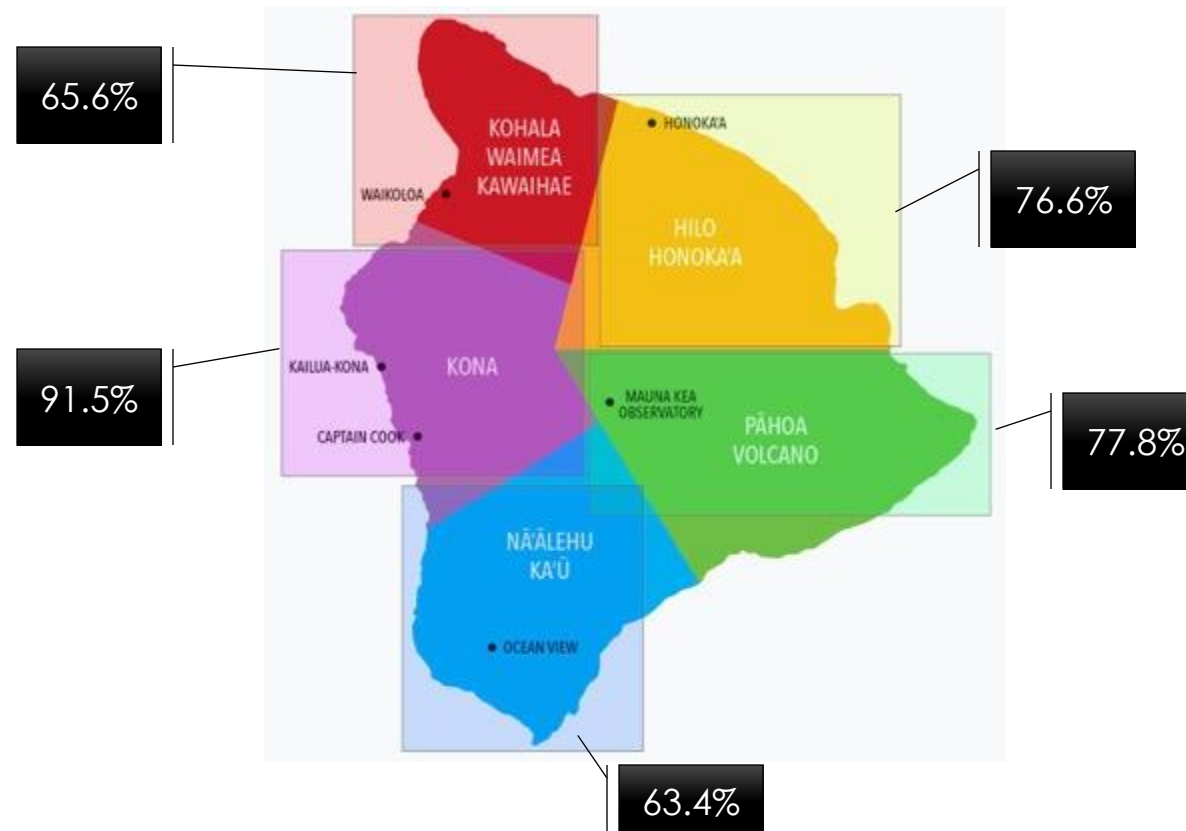
# AREAS VISITED - ISLAND OF HAWAI'I KOREA



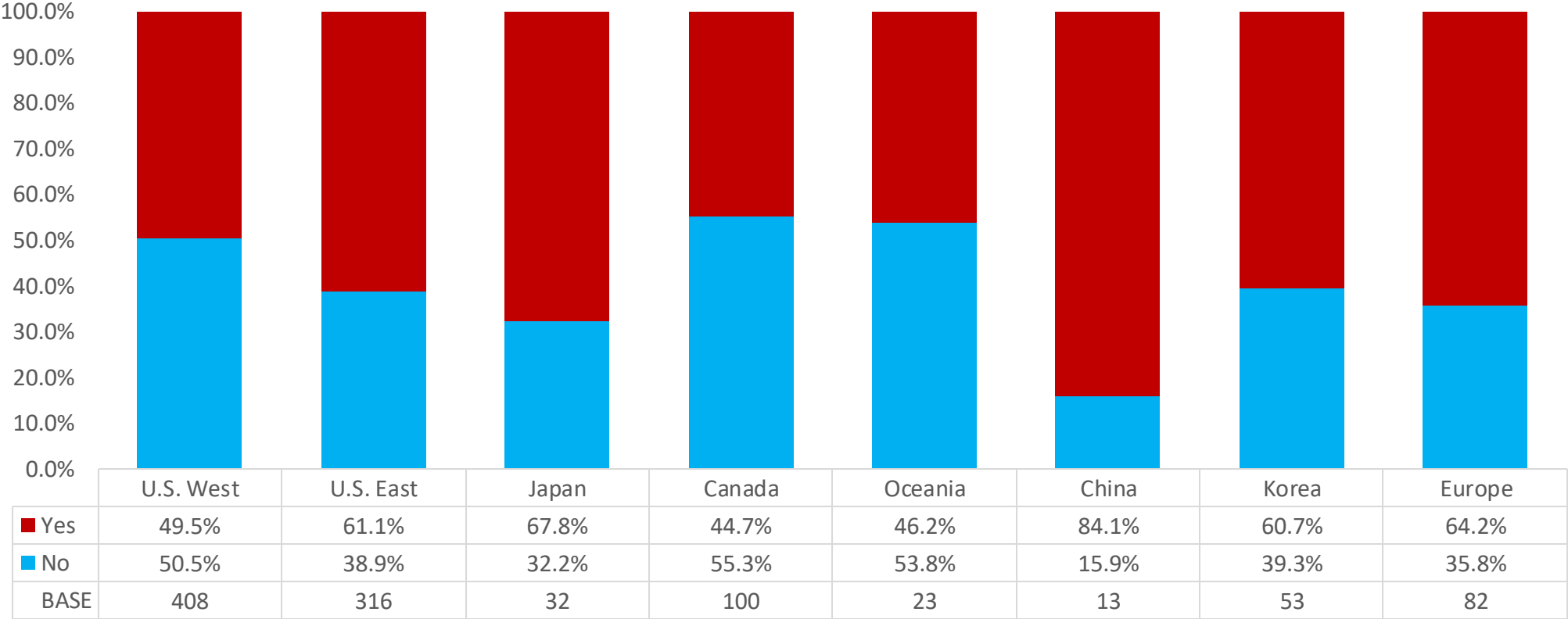
# AREAS VISITED - ISLAND OF HAWAI'I CHINA



# AREAS VISITED - ISLAND OF HAWAI'I EUROPE

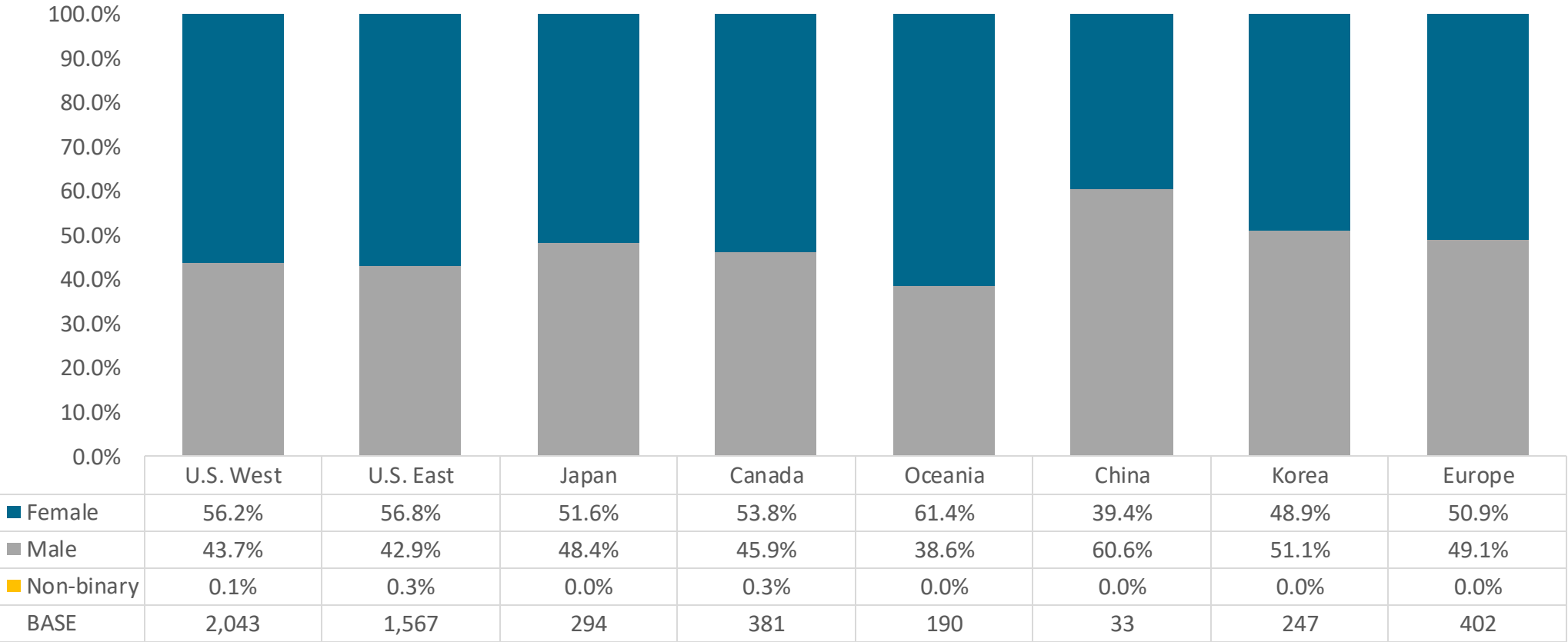


# VOLCANIC ERUPTION MOTIVATOR - ISLAND OF HAWAI‘I

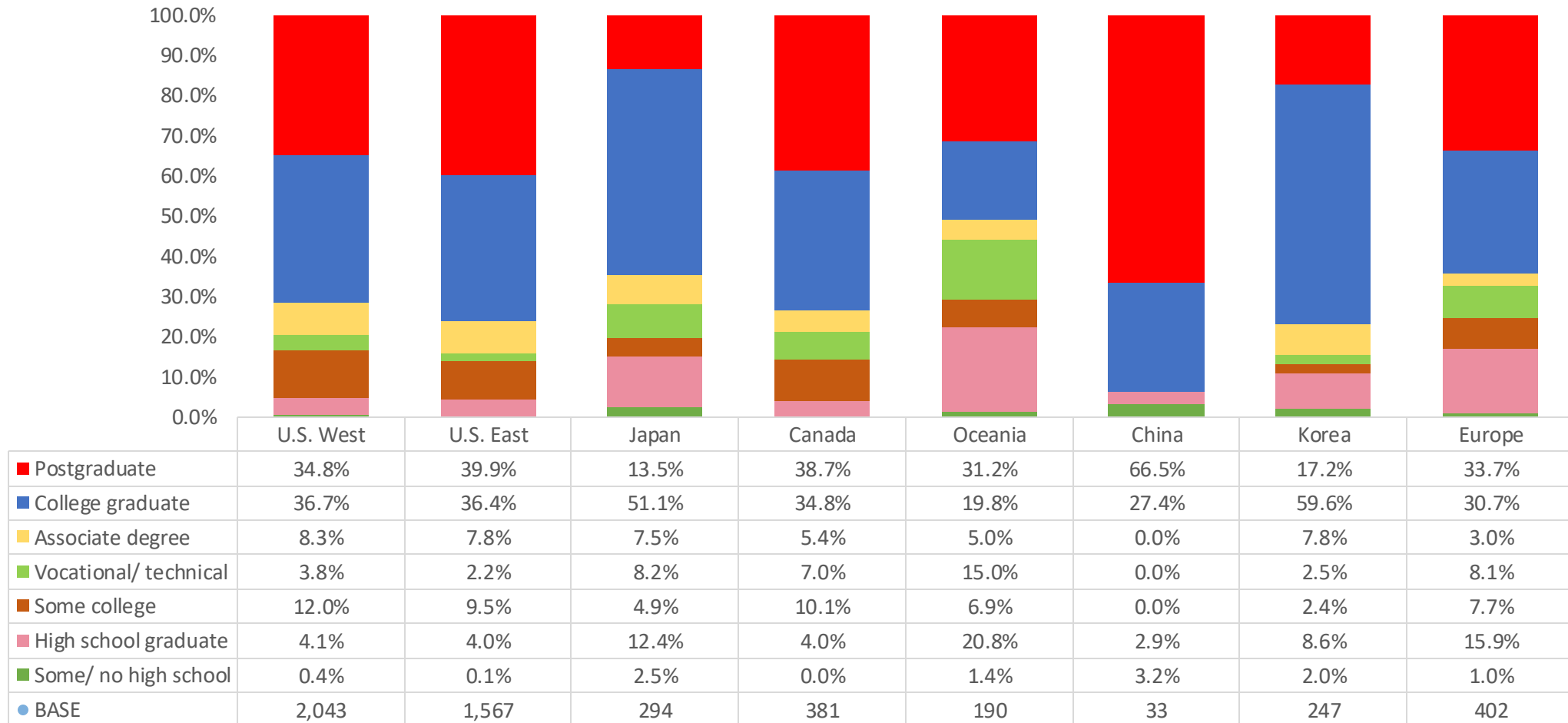


# Section 11 – Visitor Profile

# VISITOR PROFILE - GENDER



# VISITOR PROFILE - EDUCATION



# VISITOR PROFILE - HOUSEHOLD INCOME (US\$)

|                        | U.S. West | U.S. East | Canada | Oceania | Europe |
|------------------------|-----------|-----------|--------|---------|--------|
| < \$40,000             | 3.9%      | 4.9%      | 3.3%   | 7.9%    | 12.6%  |
| \$40,000 to \$59,999   | 5.2%      | 4.7%      | 6.3%   | 8.4%    | 9.4%   |
| \$60,000 to \$79,999   | 7.6%      | 7.5%      | 8.5%   | 10.9%   | 9.5%   |
| \$80,000 to \$99,999   | 9.2%      | 9.1%      | 8.8%   | 11.9%   | 15.8%  |
| \$100,000 to \$124,999 | 10.6%     | 13.9%     | 15.6%  | 8.4%    | 10.6%  |
| \$125,000 to \$149,999 | 11.1%     | 10.5%     | 10.3%  | 13.4%   | 11.5%  |
| \$150,000 to \$174,999 | 8.4%      | 8.6%      | 10.4%  | 5.3%    | 8.2%   |
| \$175,000 to \$199,999 | 7.6%      | 6.7%      | 8.8%   | 10.5%   | 4.7%   |
| \$200,000 to \$249,999 | 11.1%     | 11.2%     | 9.6%   | 9.0%    | 5.4%   |
| \$250,000 +            | 25.4%     | 22.9%     | 18.4%  | 14.5%   | 12.3%  |
| BASE                   | 2,043     | 1,567     | 381    | 190     | 402    |

# VISITOR PROFILE - HOUSEHOLD INCOME (Yen)

|                       | Japanese |
|-----------------------|----------|
| < ¥3.5 million        | 9.5%     |
| ¥3.5 - ¥4.5 million   | 12.2%    |
| ¥4.5 - ¥5.5 million   | 4.6%     |
| ¥5.5 - ¥6.5 million   | 7.4%     |
| ¥6.5 - ¥7.5 million   | 7.9%     |
| ¥7.5 - ¥8.5 million   | 6.7%     |
| ¥8.5 - ¥10.0 million  | 10.6%    |
| ¥10.0 - ¥15.0 million | 18.3%    |
| ¥15.0 - ¥20.0 million | 7.4%     |
| ¥20.0 million +       | 15.4%    |
| BASE                  | 294      |

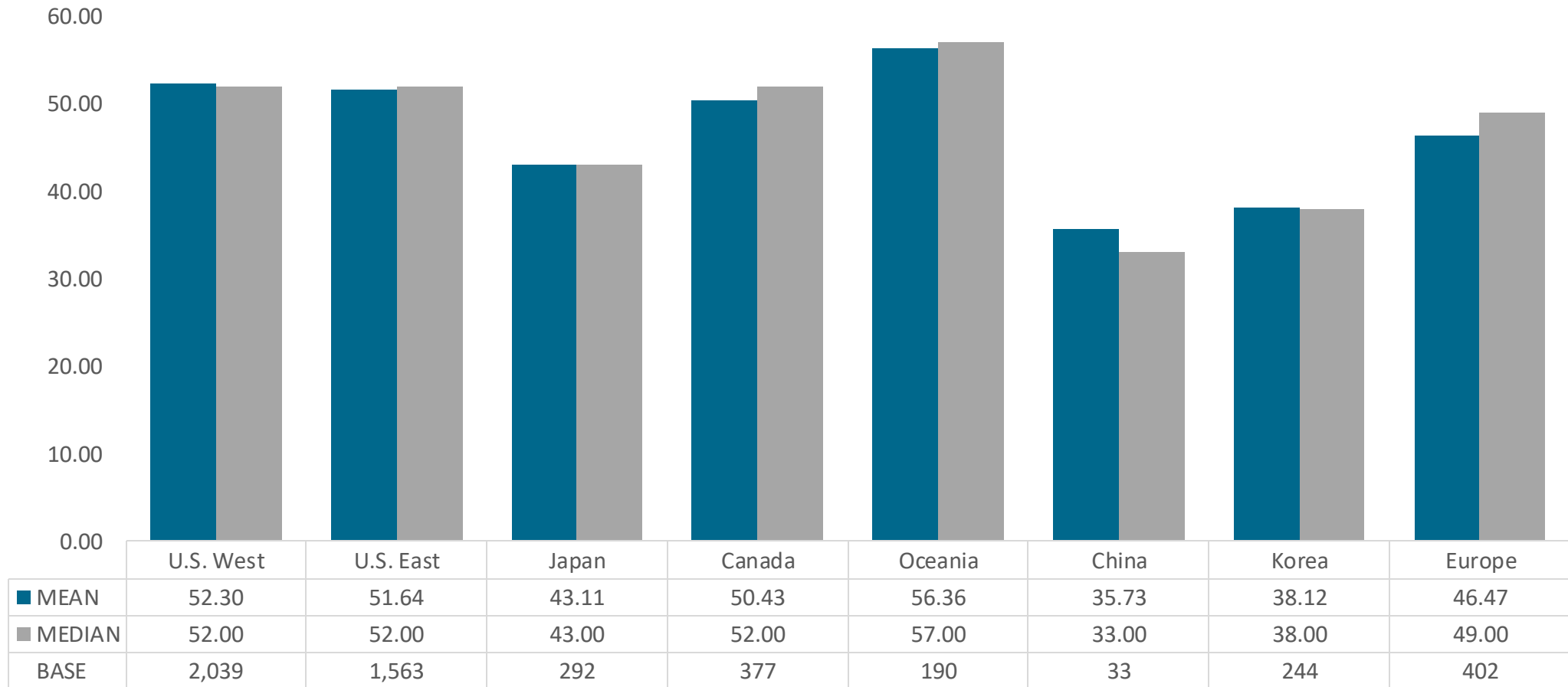
# VISITOR PROFILE - HOUSEHOLD INCOME (Korean Won)

|                             | Korean |
|-----------------------------|--------|
| < ₩16,305,000               | 8.1%   |
| ₩16,305,000 - ₩27,173,999   | 5.7%   |
| ₩27,174,000 - ₩38,041,999   | 5.6%   |
| ₩38,042,000 - ₩48,911,999   | 8.3%   |
| ₩48,912,000 - ₩59,781,999   | 7.5%   |
| ₩59,782,000 - ₩70,652,999   | 9.9%   |
| ₩70,653,000 - ₩81,520,999   | 9.3%   |
| ₩81,521,000 - ₩92,390,999   | 6.5%   |
| ₩92,391,000 - ₩103,259,999  | 7.5%   |
| ₩103,260,000 - ₩149,999,999 | 16.3%  |
| ₩150,000,000 - ₩199,999,999 | 8.2%   |
| ₩200,000,000+               | 7.0%   |
| BASE                        | 247    |

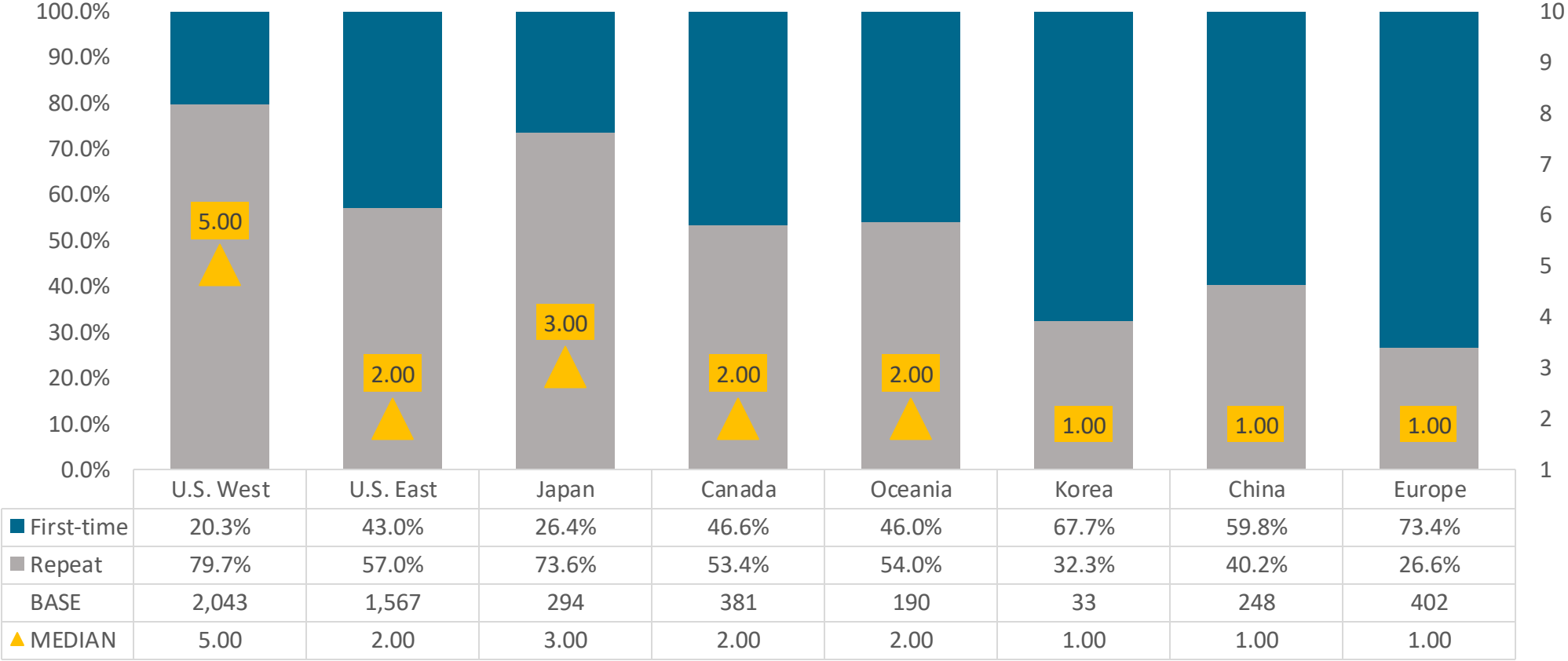
# VISITOR PROFILE - HOUSEHOLD INCOME (Chinese Yuan)

|                         | China |
|-------------------------|-------|
| <¥250,799               | 18.2% |
| ¥250,800 – ¥376,099     | 15.0% |
| ¥376,100 – ¥501,399     | 24.4% |
| ¥501,400 – ¥626,799     | 9.1%  |
| ¥626,800 – ¥783,499     | 5.9%  |
| ¥783,500 – ¥940,199     | -0.0% |
| ¥940,200 – ¥1,096,899   | 6.2%  |
| ¥1,096,900 - ¥1,253,599 | 2.9%  |
| ¥1,253,600 – ¥1,560,799 | 2.9%  |
| ¥1,560,800+             | 15.3% |
| BASE                    | 33    |

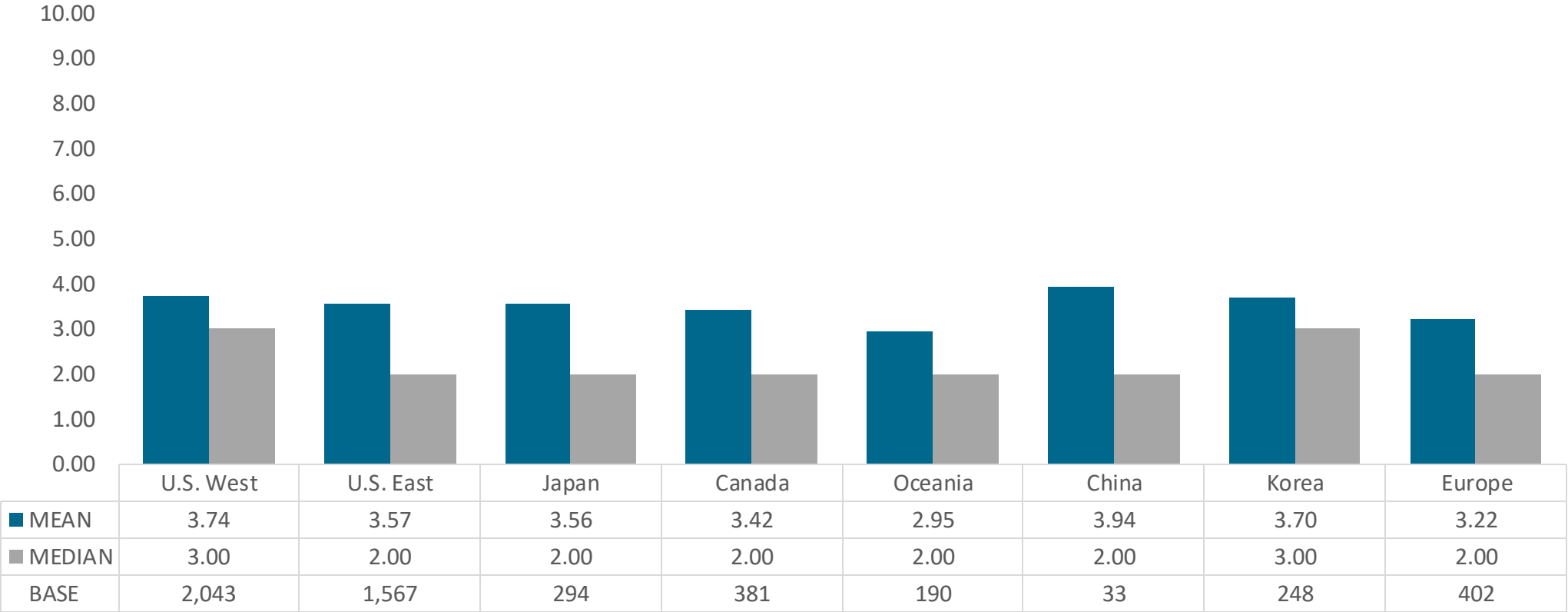
# VISITOR PROFILE - AGE



# VISITOR PROFILE - TRIPS TO HAWAII



# VISITOR PROFILE - TRAVEL PARTY SIZE



# VISITOR PROFILE - TRAVEL PARTY

|   | U.S. West | U.S. East | Japan | Canada | Oceania | China | Korea | Europe |
|---|-----------|-----------|-------|--------|---------|-------|-------|--------|
| My spouse                                 | 60.7%     | 61.9%     | 63.5% | 59.5%  | 68.4%   | 45.6% | 57.9% | 53.3%  |
| Other adult members of my family          | 34.2%     | 31.1%     | 23.1% | 27.4%  | 22.4%   | 20.9% | 27.9% | 22.9%  |
| My child(ren)/ grandchild(ren) under 18   | 35.4%     | 26.6%     | 22.6% | 32.4%  | 18.3%   | 9.4%  | 25.8% | 30.4%  |
| My friends/ associates                    | 13.6%     | 14.4%     | 12.7% | 9.7%   | 14.1%   | 15.3% | 9.2%  | 13.1%  |
| Myself only (traveled alone/ no one else) | 8.9%      | 10.3%     | 5.5%  | 13.2%  | 10.3%   | 17.9% | 6.2%  | 10.9%  |
| My girlfriend/ boyfriend                  | 6.0%      | 4.2%      | 3.3%  | 5.0%   | 4.1%    | 5.9%  | 1.6%  | 10.3%  |
| Same gender partner                       | 1.1%      | 0.9%      | 0.6%  | 1.3%   | 0.0%    | 0.0%  | 0.4%  | 0.7%   |
| BASE                                      | 2,043     | 1,567     | 294   | 381    | 190     | 33    | 248   | 402    |

## 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 | 914       | 3.24              |
| U.S. East | 936       | 3.20              |
| Japan     | 274       | 5.92              |
| Canada    | 202       | 6.90              |
| Oceania   | 173       | 7.45              |
| China     | 29        | 18.20             |
| Korea     | 230       | 6.46              |
| Europe    | 320       | 5.48              |
| All MMAs  | 3,078     | 1.77              |

\* 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 | 334       | 5.36              |
| U.S. East | 322       | 5.46              |
| Japan     | 1         | 98.00             |
| Canada    | 67        | 11.97             |
| Oceania   | 8         | 34.65             |
| China     | 1         | 98.00             |
| Korea     | 8         | 34.65             |
| Europe    | 116       | 9.10              |
| All MMAs  | 857       | 3.35              |

\* 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 | 607       | 3.98                  |
| U.S. East | 533       | 4.24                  |
| Japan     | 8         | 34.65                 |
| Canada    | 117       | 9.06                  |
| Oceania   | 13        | 27.18                 |
| China     | 5         | 43.83                 |
| Korea     | 11        | 29.55                 |
| Europe    | 156       | 7.95                  |
| All MMAs  | 1,450     | 2.57                  |

\* 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 | 440       | 4.67              |
| U.S. East | 400       | 4.90              |
| Japan     | 33        | 17.06             |
| Canada    | 117       | 9.06              |
| Oceania   | 25        | 19.60             |
| China     | 13        | 27.18             |
| Korea     | 56        | 13.10             |
| Europe    | 132       | 8.53              |
| All MMAs  | 1,216     | 2.81              |

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

