



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.

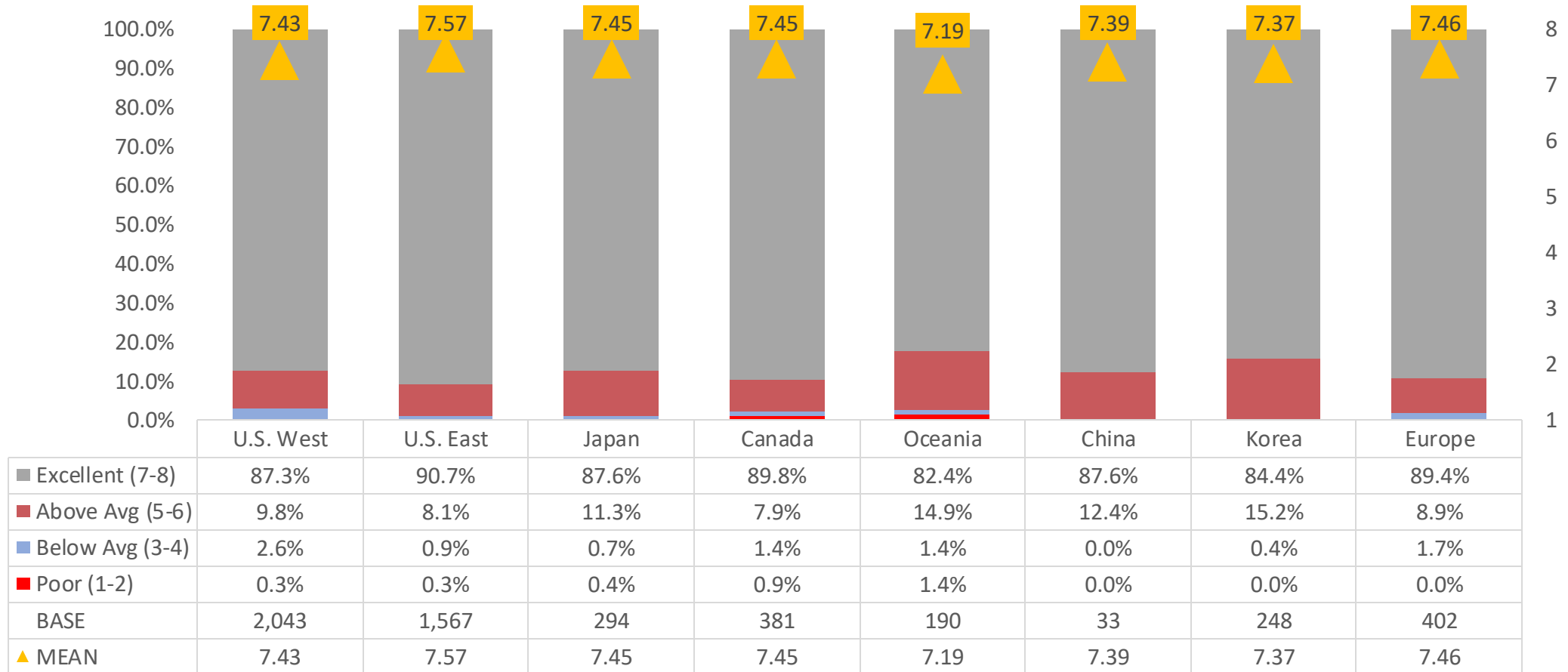
Data for 2025 is preliminary. Data for all other prior years reflect final visitor statistics from DBEDT Annual Visitor Satisfaction and Activity reports.

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



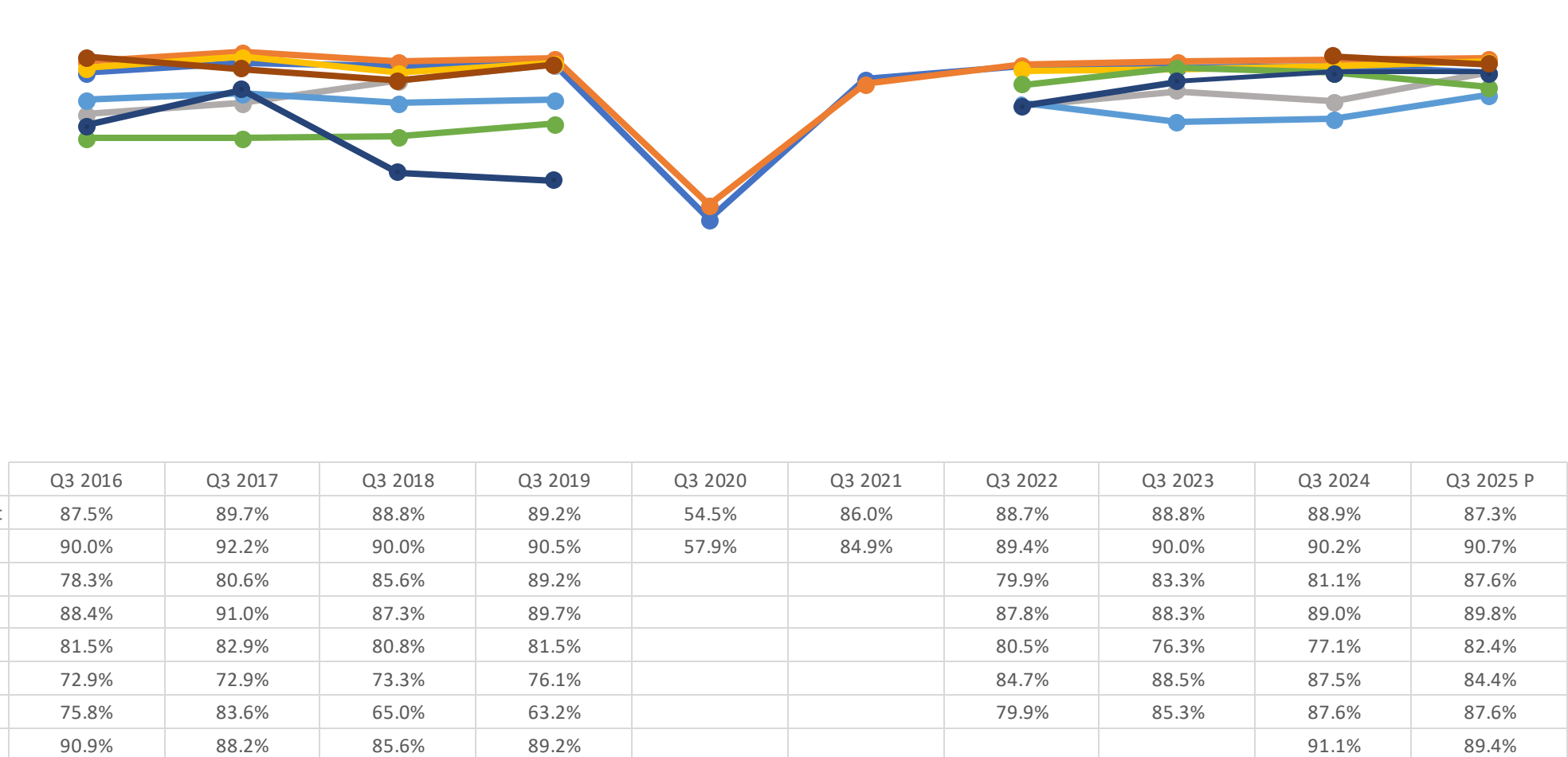
SATISFACTION – STATE OF HAWAI‘I BY VISITOR MARKET

- **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%



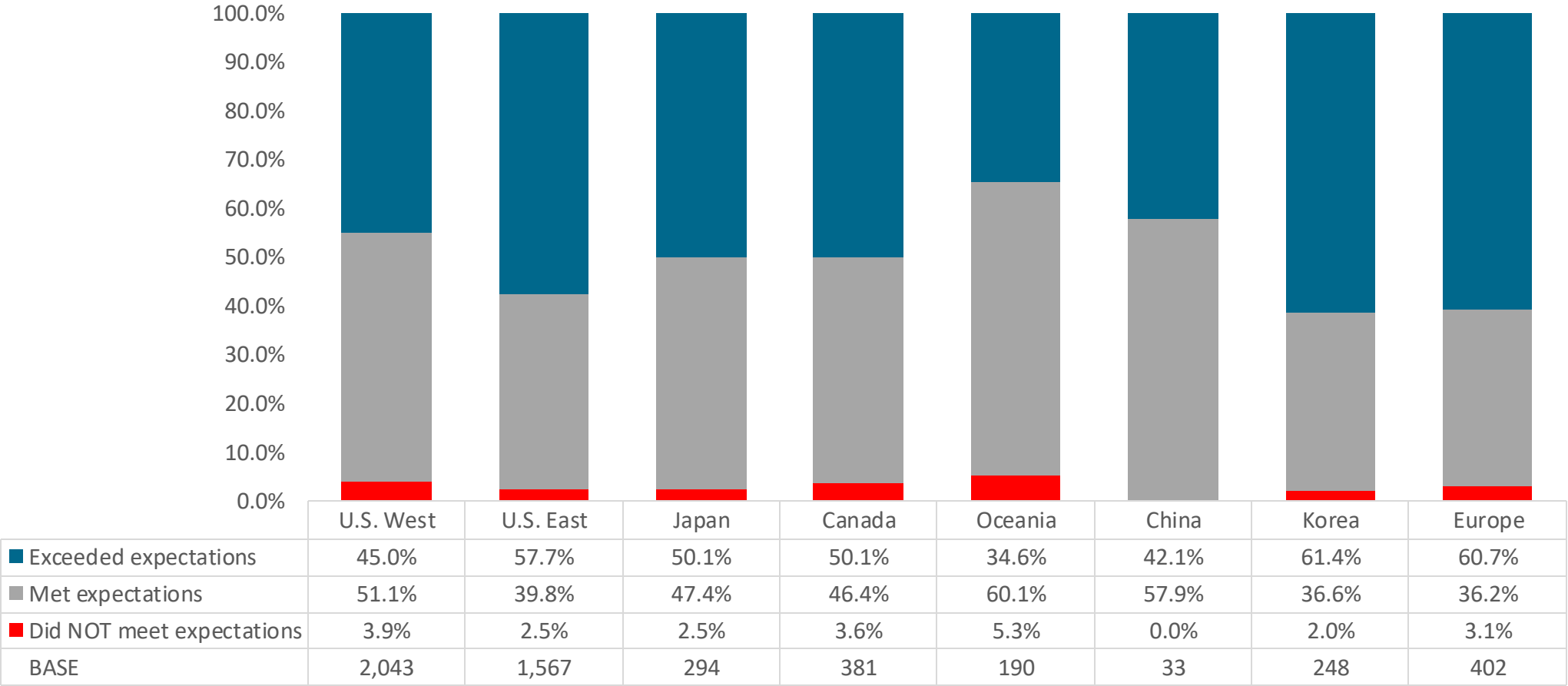
P= Preliminary Data

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

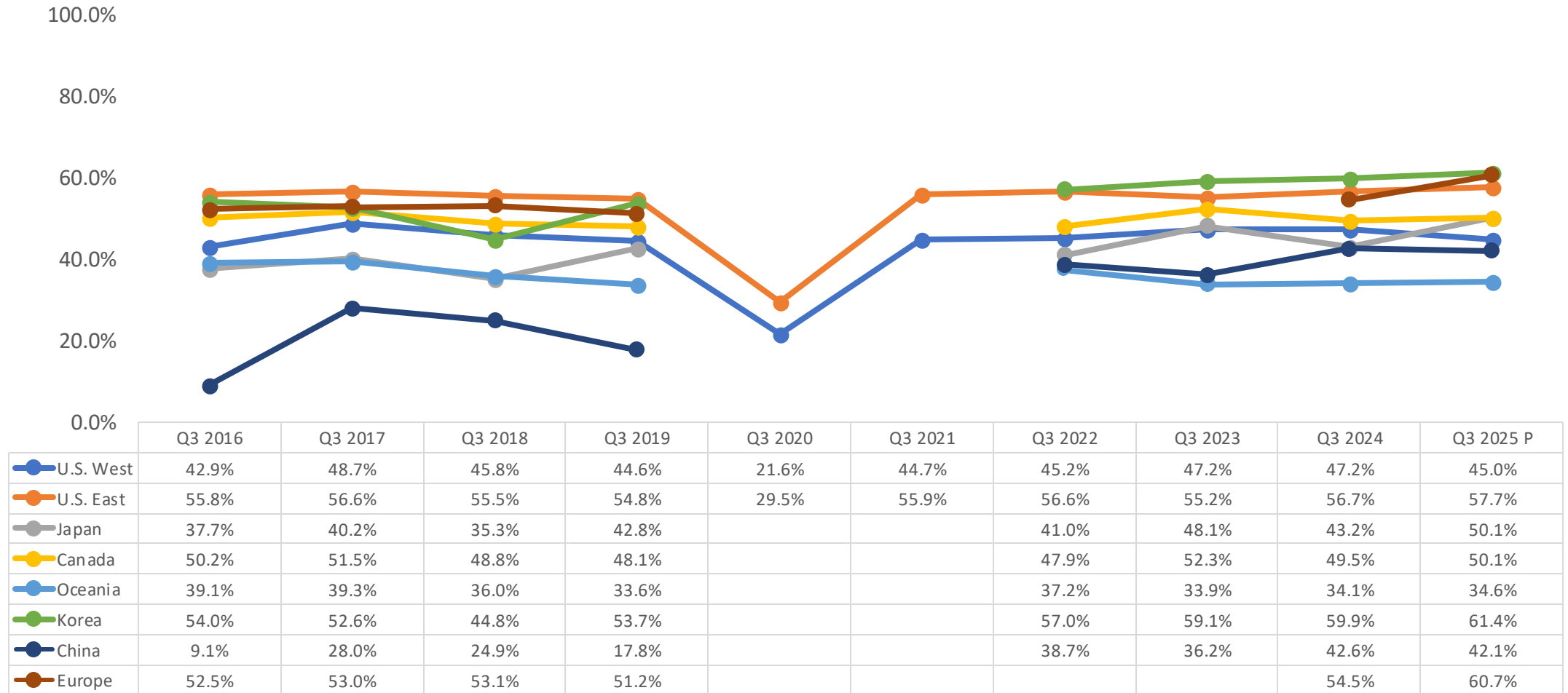


SATISFACTION – HAWAI‘I TRIP EXPECTATIONS

- ***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

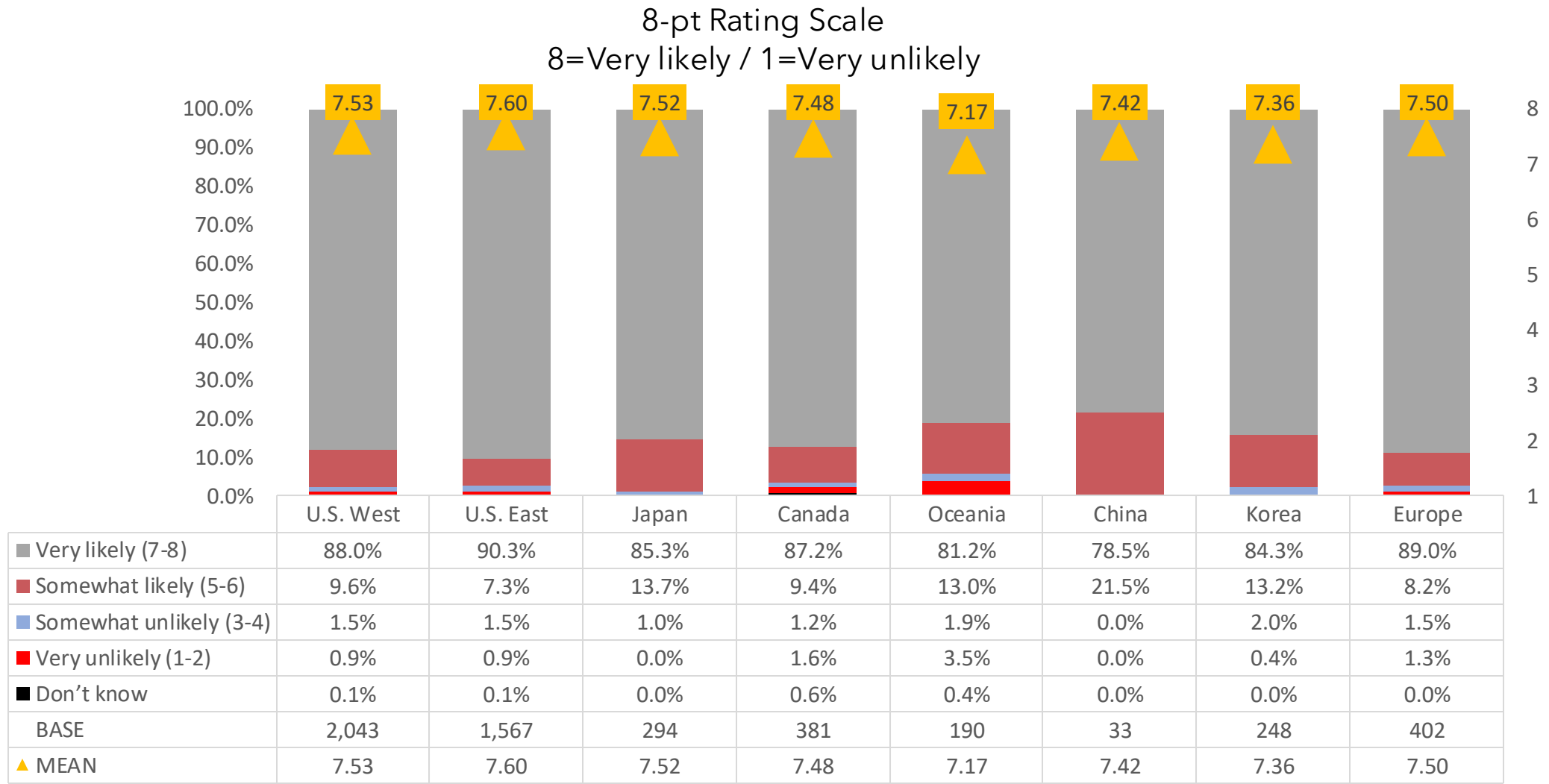
Tracking Data – Rating of “Exceeded expectations”



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

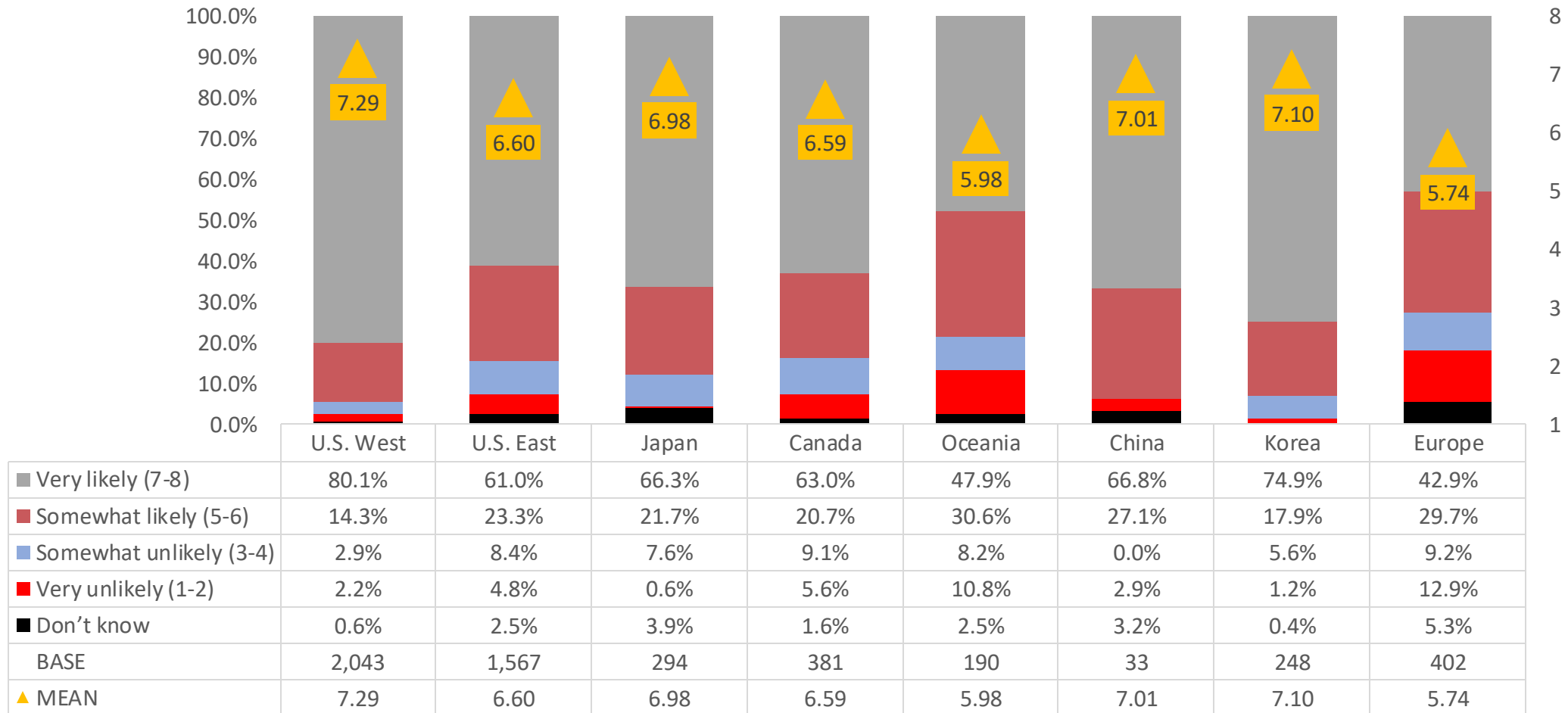
Q. How likely are you to recommend the state of Hawai'i as a vacation place to your friends and relatives?

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

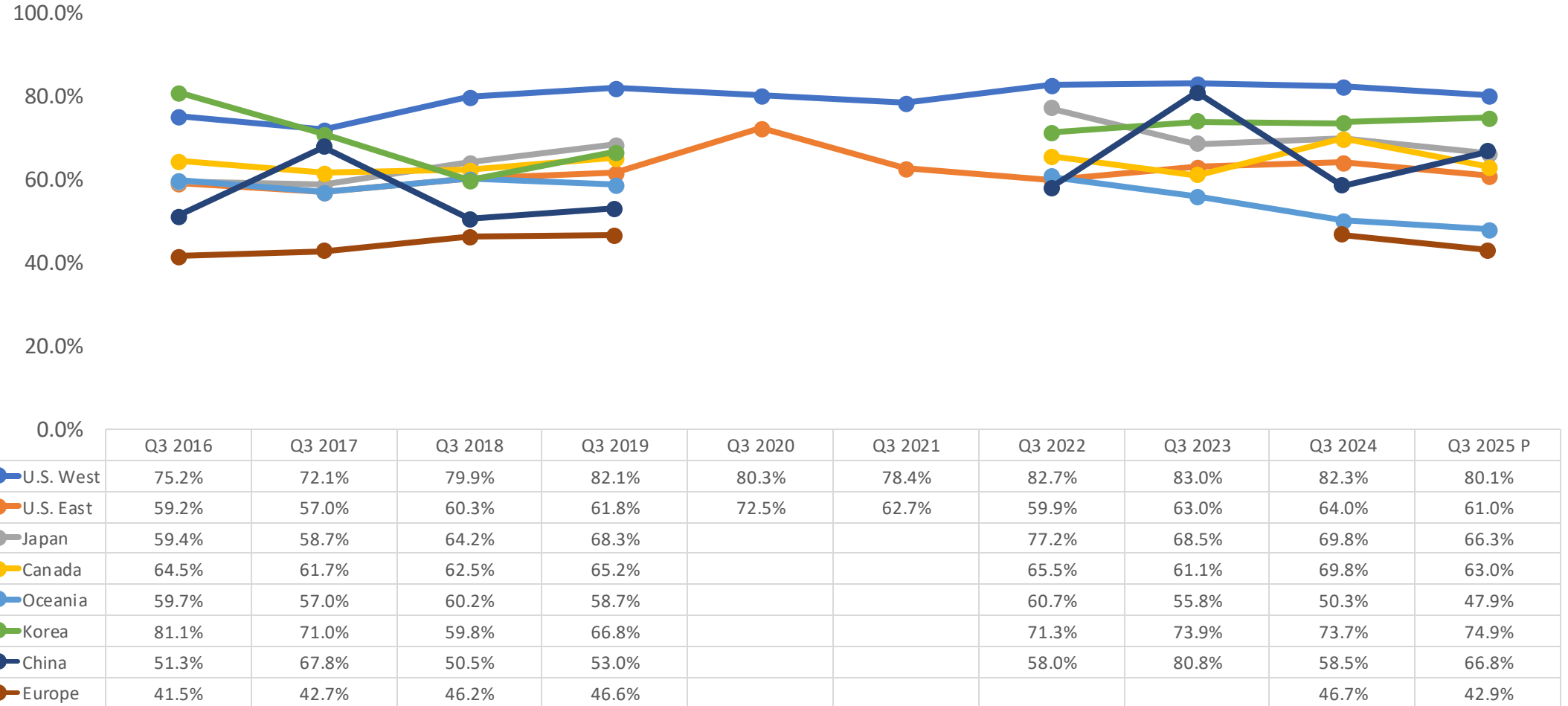


LIKELIHOOD OF RETURN VISIT

- ***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 39.7% Want to go someplace new 32.8% Too crowded/ congested/ traffic 29.3% Poor value 19.0% No compelling reason to return 17.2% Too commercial/ overdeveloped 13.8% Unfriendly people/ felt unwelcome 12.1% Five years is too soon 10.3% Other financial obligations	46.0% High cost of travel 15.2% Negative local interaction 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 40.8% Flight too long 39.2% Want to go someplace new 17.9% Poor value 17.0% Five years is too soon 13.5% Other financial obligations 12.8% Too crowded/ congested/ traffic	49.3% High cost of travel 26.7% Long travel distance 18.4% Preference for other destinations 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 31.7% Want to go someplace new 29.2% Five years is too soon 18.2% Other financial obligations 15.0% Too commercialized/ overdeveloped 11.4% Poor value	38.7% High cost of travel 26.3% Other 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 34.3% Want to go someplace new 26.5% Flight too long 23.9% Five years is too soon 16.4% Poor value 13.9% Other financial obligations	57.2% High cost of travel 19.1% Long travel distance 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 33.8% Poor value 30.3% Want to go someplace new 26.6% Too commercialized/ overdeveloped 24.2% Too crowded/ congested/ traffic 18.0% No compelling reason to return 12.7% Five years is too soon	41.3% Preference for other destinations 41.3% High cost of travel 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 61.8% Poor value 17.7% Flight too long 13.2% Want to go someplace new 11.8% Other financial obligations 11.8% Unfriendly people/ felt unwelcome 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 40.0% Poor value 20.0% Flight too long 20.0% Five years is too soon 20.0% Too crowded/ congested/ traffic 20.0% No compelling reason to return 20.0% Poor health/ age 20.0% Unfriendly people/ felt unwelcome 20.0% Buildings/ infrastructure	52.4% Other 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

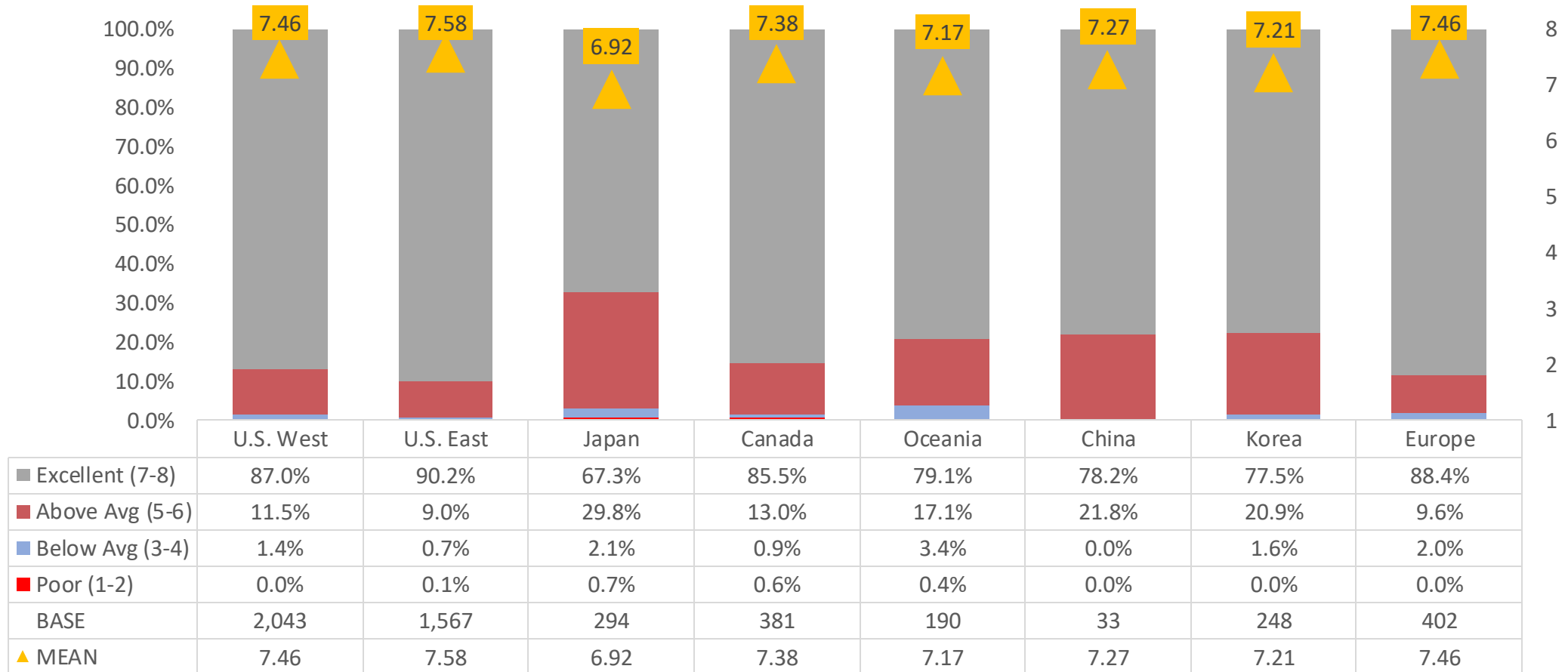
Top Responses 10%+

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

P= Preliminary Data

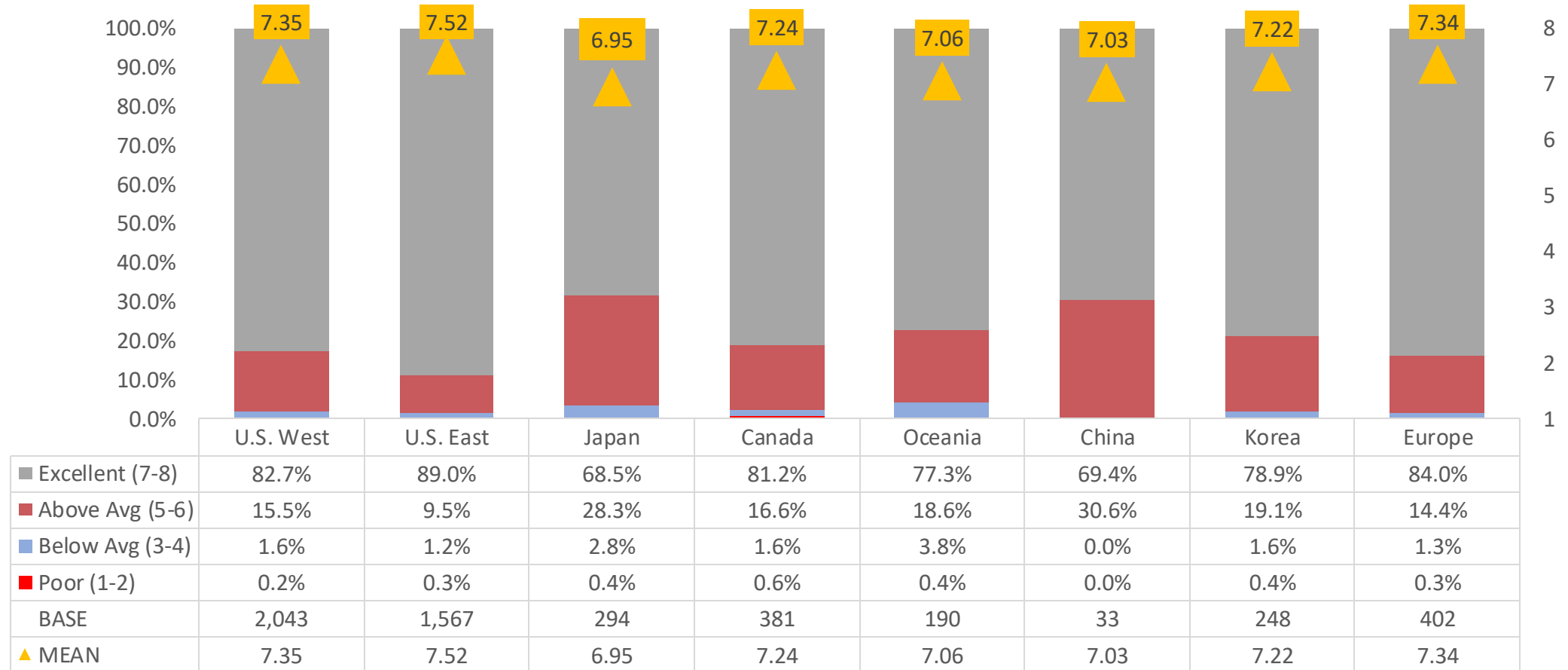
OFFERING A VARIETY OF EXPERIENCES

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



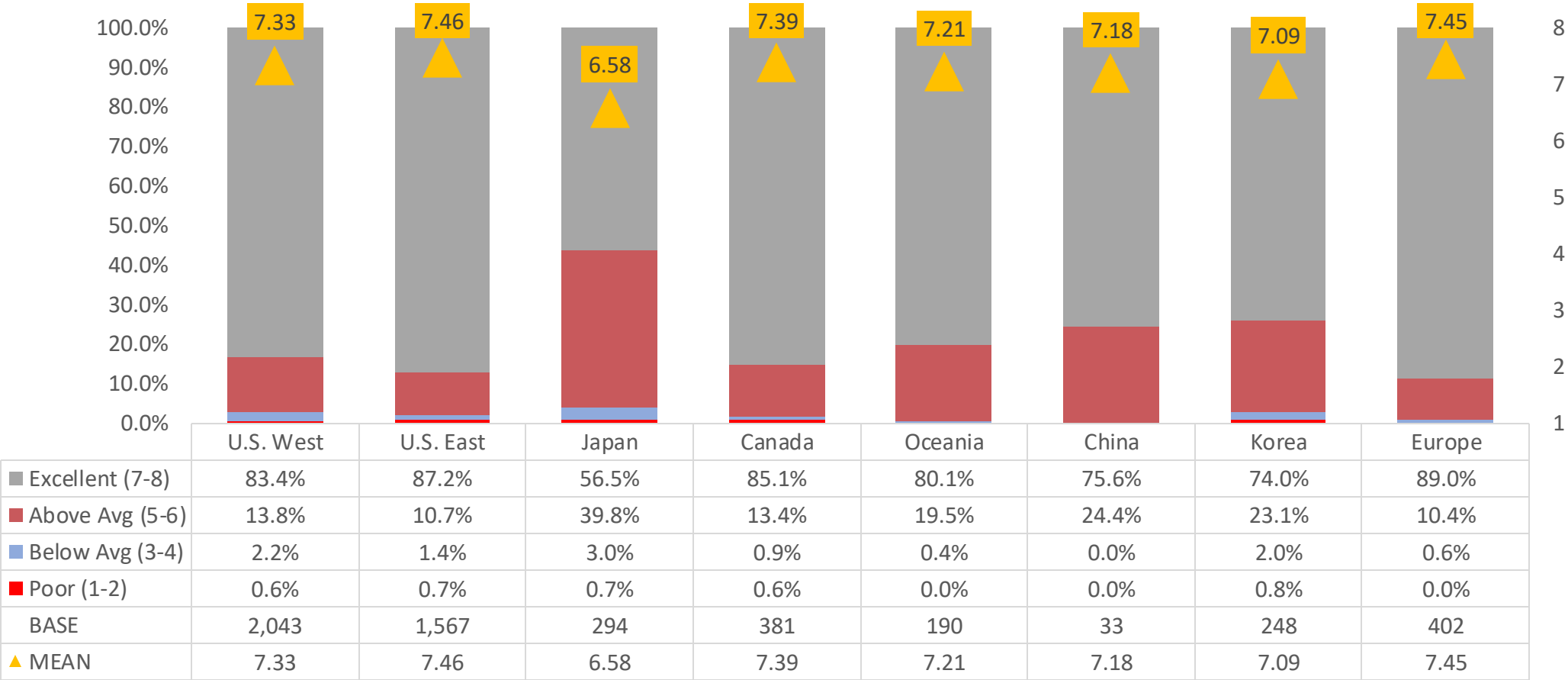
NUMBER OF DIFFERENT/ UNIQUE EXPERIENCES

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



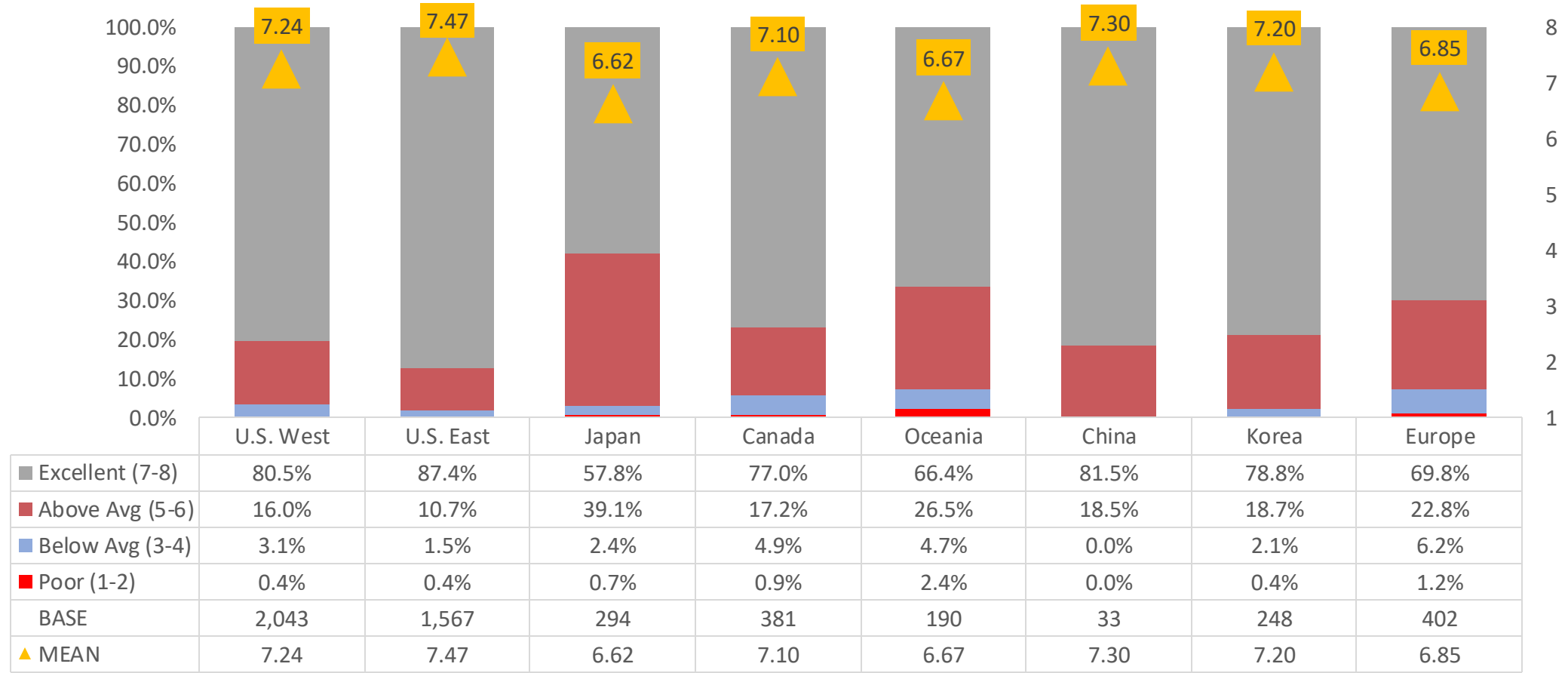
SAFE AND SECURE DESTINATION

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



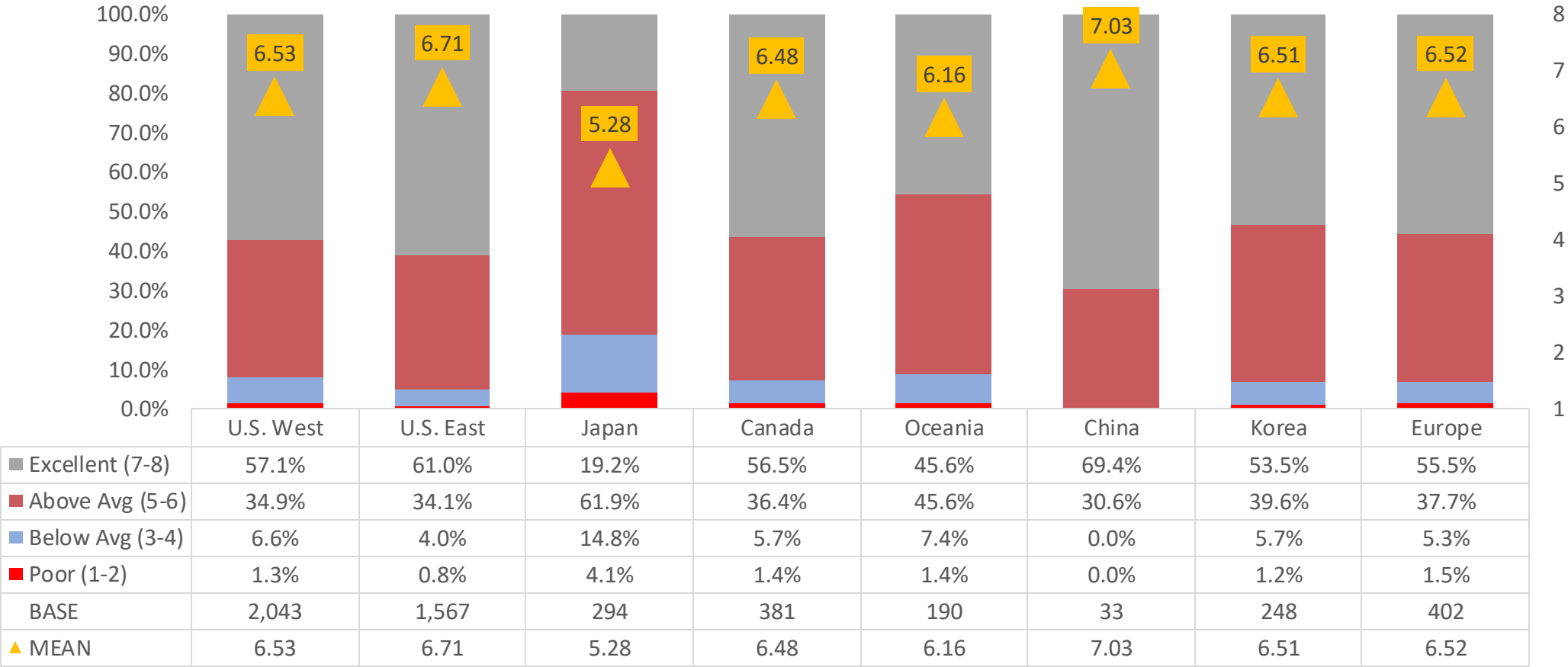
ENVIRONMENTALLY FRIENDLY/ SUSTAINABLE

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
TOTAL	98.0%	98.6%	97.8%	97.5%	93.9%	96.8%	99.6%	99.0%
On own (self-guided)/ driving around island	86.0%	84.2%	79.9%	84.7%	48.4%	75.9%	84.5%	81.5%
Helicopter ride/ airplane tour	2.4%	4.9%	0.0%	3.1%	1.1%	3.2%	4.4%	15.2%
Boat tour/ submarine ride/ whale watching	25.4%	33.9%	8.3%	24.7%	16.6%	32.9%	31.7%	29.4%
Visit towns/ communities	59.6%	60.1%	33.4%	54.1%	32.1%	39.4%	42.5%	59.1%
Private limousine/ van tour/ tour bus	7.5%	15.9%	15.9%	11.8%	32.0%	15.0%	8.9%	12.6%
Scenic views/ natural landmarks	66.7%	76.4%	23.0%	72.3%	62.4%	72.4%	59.5%	76.4%
Movie/ TV/ film location tours	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
TOTAL	96.6%	96.7%	96.6%	99.0%	92.4%	100.0%	98.4%	99.3%
Beach/ sunbathing	85.7%	85.6%	77.3%	90.8%	78.3%	94.1%	82.3%	92.4%
Bodyboarding	12.9%	9.8%	1.1%	14.8%	5.7%	8.8%	5.8%	14.0%
Stand-up paddle boarding	5.2%	3.8%	2.4%	4.7%	4.0%	2.9%	5.3%	5.5%
Surfing	6.9%	7.7%	5.0%	11.6%	5.1%	9.1%	9.2%	16.1%
Canoe paddling	2.5%	1.7%	2.0%	1.9%	0.7%	2.9%	3.7%	1.0%
Kayaking	4.7%	4.3%	2.8%	5.0%	1.1%	5.9%	2.4%	3.9%
Swimming in the ocean	71.8%	71.6%	40.2%	76.0%	65.1%	47.9%	55.9%	82.7%
Snorkeling	47.7%	46.3%	19.1%	47.4%	25.6%	48.5%	50.1%	54.2%
Freediving	2.4%	2.7%	0.3%	2.9%	1.4%	9.1%	1.6%	2.4%
Windsurfing/ kitesurfing	0.7%	0.4%	0.0%	1.2%	0.7%	0.0%	0.0%	0.4%
Jet skiing/ parasailing	2.1%	2.4%	3.2%	2.2%	1.1%	0.0%	1.6%	0.3%
Scuba diving	2.6%	2.6%	2.0%	4.6%	0.0%	2.9%	0.4%	2.7%
Fishing	3.1%	3.6%	0.4%	2.9%	0.7%	2.9%	0.4%	0.4%
Golf	6.3%	6.3%	6.4%	8.6%	2.6%	6.2%	5.8%	1.9%
Running/ jogging/ fitness/ walking	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
TOTAL	96.6%	96.7%	96.6%	99.0%	92.4%	100.0%	98.4%	99.3%
Cycling	2.3%	2.1%	3.6%	3.3%	2.1%	2.9%	0.8%	3.4%
Spa	9.6%	10.5%	3.5%	5.6%	4.6%	8.8%	2.5%	7.4%
Hiking	38.2%	48.2%	20.4%	46.7%	17.4%	54.7%	27.3%	48.7%
Backpacking/ camping	0.9%	1.4%	0.4%	1.3%	0.0%	8.8%	1.7%	1.7%
Agritourism	20.9%	24.9%	12.5%	18.1%	11.9%	17.6%	21.9%	15.0%
Sports event or tournament	1.7%	2.1%	0.4%	4.3%	1.4%	0.0%	0.8%	3.2%
Parks/ botanical gardens	34.8%	43.3%	20.0%	37.7%	22.5%	30.0%	23.2%	39.8%
Waterparks	2.3%	1.7%	3.5%	1.7%	0.7%	2.9%	4.0%	1.0%
Mountain tubing/ waterfall rappel	2.7%	3.9%	0.7%	1.7%	0.7%	5.9%	3.7%	4.9%
Ziplining	5.1%	3.4%	0.4%	3.7%	1.1%	0.0%	0.4%	2.4%
Skydiving	0.3%	0.9%	0.9%	0.0%	0.4%	0.0%	0.8%	0.3%
All-terrain vehicle (ATV)	2.8%	4.6%	3.1%	6.1%	1.1%	2.9%	7.6%	3.3%
Horseback riding	1.7%	1.7%	3.0%	1.2%	0.0%	5.9%	0.4%	1.2%
Tennis/ pickleball	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
TOTAL	99.4%	98.7%	98.2%	99.2%	98.9%	100.0%	99.1%	98.5%
Lunch/ sunset/ dinner/ evening cruise	19.6%	23.6%	13.9%	26.7%	14.1%	60.0%	32.0%	25.5%
Live music/ stage show	32.1%	42.1%	18.0%	33.1%	20.1%	32.9%	12.2%	32.0%
Nightclub/ dancing/ bar/ karaoke	7.4%	7.7%	2.0%	5.3%	5.5%	9.1%	3.9%	5.4%
Fine dining	51.1%	51.7%	36.0%	40.7%	29.4%	33.2%	43.4%	32.9%
Family restaurant	76.8%	71.6%	31.8%	69.6%	70.6%	30.6%	60.2%	59.2%
Fast food	41.1%	40.0%	54.9%	56.1%	53.4%	51.2%	61.3%	57.2%
Food truck	46.2%	48.3%	20.2%	49.8%	29.1%	30.9%	57.6%	53.0%
Café/ coffee house	54.3%	54.0%	51.0%	54.0%	58.6%	36.8%	67.0%	56.4%
Ethnic dining	24.1%	30.7%	5.0%	19.7%	10.9%	23.8%	17.3%	9.4%
Farm-to-table cuisine	17.7%	18.5%	17.6%	9.7%	2.9%	15.0%	3.3%	9.6%
Prepared own meal	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
TOTAL	98.3%	97.0%	98.7%	98.8%	99.0%	96.8%	98.8%	98.2%
Malls/ department stores	51.8%	48.5%	87.1%	66.7%	75.0%	78.2%	80.1%	68.8%
Designer boutiques	24.8%	25.5%	21.6%	24.6%	17.4%	20.9%	6.6%	21.2%
Hotel/ resort stores	47.7%	49.0%	40.0%	42.3%	40.0%	51.2%	44.0%	38.7%
Swap meet/ flea market	23.6%	21.1%	8.2%	20.7%	7.0%	8.8%	6.9%	10.6%
Discount/ outlet stores	17.8%	19.3%	27.4%	20.3%	34.0%	24.1%	58.6%	23.5%
Supermarkets	64.0%	56.8%	67.4%	64.4%	58.7%	63.2%	66.5%	75.0%
Farmer's market	33.9%	29.8%	17.1%	38.5%	10.7%	15.0%	5.7%	32.7%
Convenience stores	53.7%	53.2%	52.3%	51.9%	69.8%	41.8%	63.1%	37.0%
Duty-free stores	4.7%	3.9%	25.3%	9.2%	9.1%	18.2%	28.0%	7.9%
Hawai'i-made products	55.9%	59.0%	21.3%	51.1%	31.9%	42.1%	28.4%	54.3%
Local shops and artisans	63.6%	67.4%	11.1%	61.4%	44.0%	24.4%	17.0%	54.5%
Local fashion designers	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
TOTAL	73.2%	80.4%	60.1%	74.9%	69.4%	85.0%	67.1%	78.9%
Historic military sites and museums	19.7%	32.6%	11.8%	26.4%	38.9%	47.4%	24.3%	38.1%
Historic Hawaiian sites and museums	37.8%	42.7%	16.8%	41.7%	28.1%	42.1%	13.6%	41.7%
Other historical sites, museums, and homes	15.1%	16.3%	10.2%	15.5%	13.0%	15.0%	17.9%	15.4%
Art museums	3.7%	4.3%	3.9%	3.5%	1.4%	0.0%	5.4%	5.5%
Art galleries and exhibitions	11.0%	11.7%	6.8%	12.0%	4.7%	0.0%	2.4%	8.2%
Lū'au/ Polynesian show/ hula show	27.1%	42.2%	11.0%	29.6%	21.6%	11.8%	16.5%	31.9%
Lesson- ex. ukulele, hula, canoe, lei making	6.7%	8.7%	3.7%	6.3%	3.7%	3.2%	4.8%	9.4%
Play/ concert/ theatre	4.7%	3.5%	6.2%	7.0%	3.9%	0.0%	4.4%	5.2%
Art/ craft fair	12.8%	10.9%	4.2%	7.3%	1.9%	18.5%	5.7%	6.4%
Festival/ event	4.3%	5.0%	6.5%	5.3%	2.5%	6.5%	1.7%	3.9%

ACTIVITIES - TRANSPORTATION

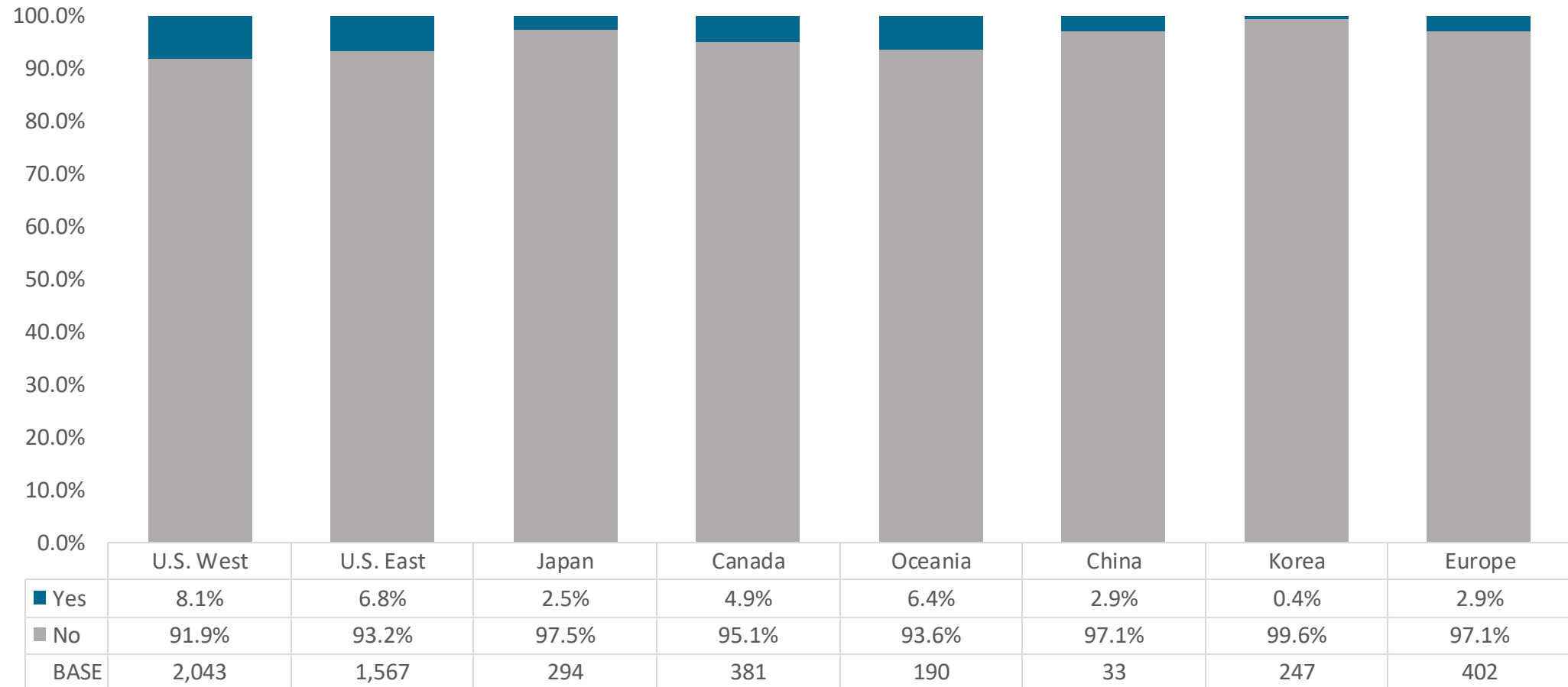
	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	93.8%	93.8%	95.5%	95.6%	97.9%	100.0%	97.1%	98.3%
Airport shuttle	19.4%	18.3%	18.7%	12.2%	26.1%	30.0%	15.5%	20.8%
Trolley	2.9%	3.1%	44.1%	3.8%	14.1%	12.4%	30.0%	4.4%
Public bus	5.2%	5.1%	25.5%	12.1%	18.9%	15.0%	13.0%	20.6%
Tour bus/ tour van	9.4%	18.5%	22.3%	14.8%	35.3%	8.8%	20.5%	14.4%
Taxi/ limo	6.0%	8.5%	29.8%	13.7%	33.7%	17.9%	37.4%	15.5%
Rental car	74.8%	71.0%	24.2%	69.9%	22.6%	64.1%	58.3%	71.0%
Ride share	21.2%	25.9%	23.6%	26.7%	52.8%	42.4%	23.8%	28.6%
Car share	4.3%	3.9%	2.1%	5.3%	4.3%	2.9%	1.6%	1.8%
Bicycle rental	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
TOTAL	40.9%	35.5%	16.3%	26.3%	17.4%	21.5%	18.1%	16.0%
Visiting friends/ family	31.8%	25.6%	13.1%	18.2%	13.7%	12.6%	14.4%	10.0%
Volunteering/ giving back to the local community	2.2%	2.6%	1.0%	3.3%	0.7%	0.0%	0.9%	2.1%
Health and wellness activities	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

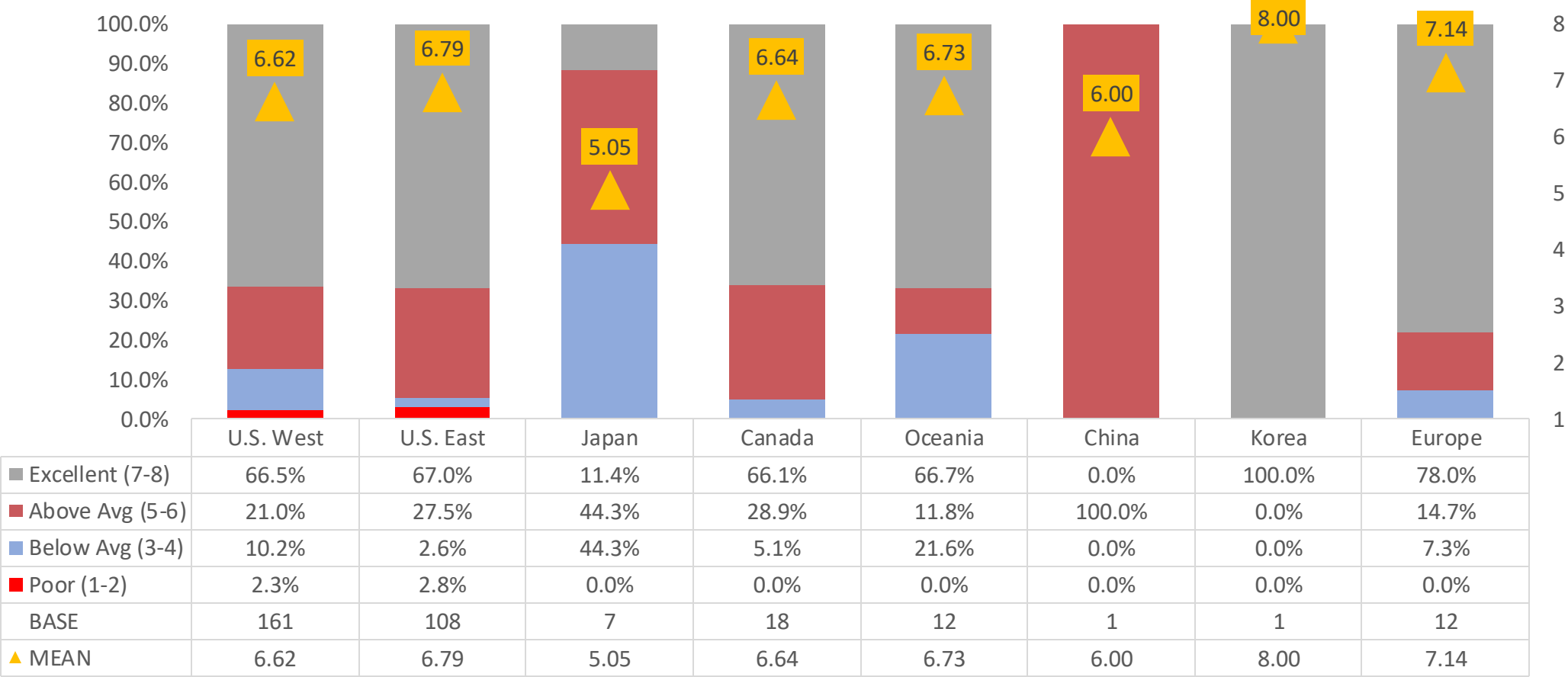


DISABLED TRAVELER – REQUIRED ASSISTANCE

	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

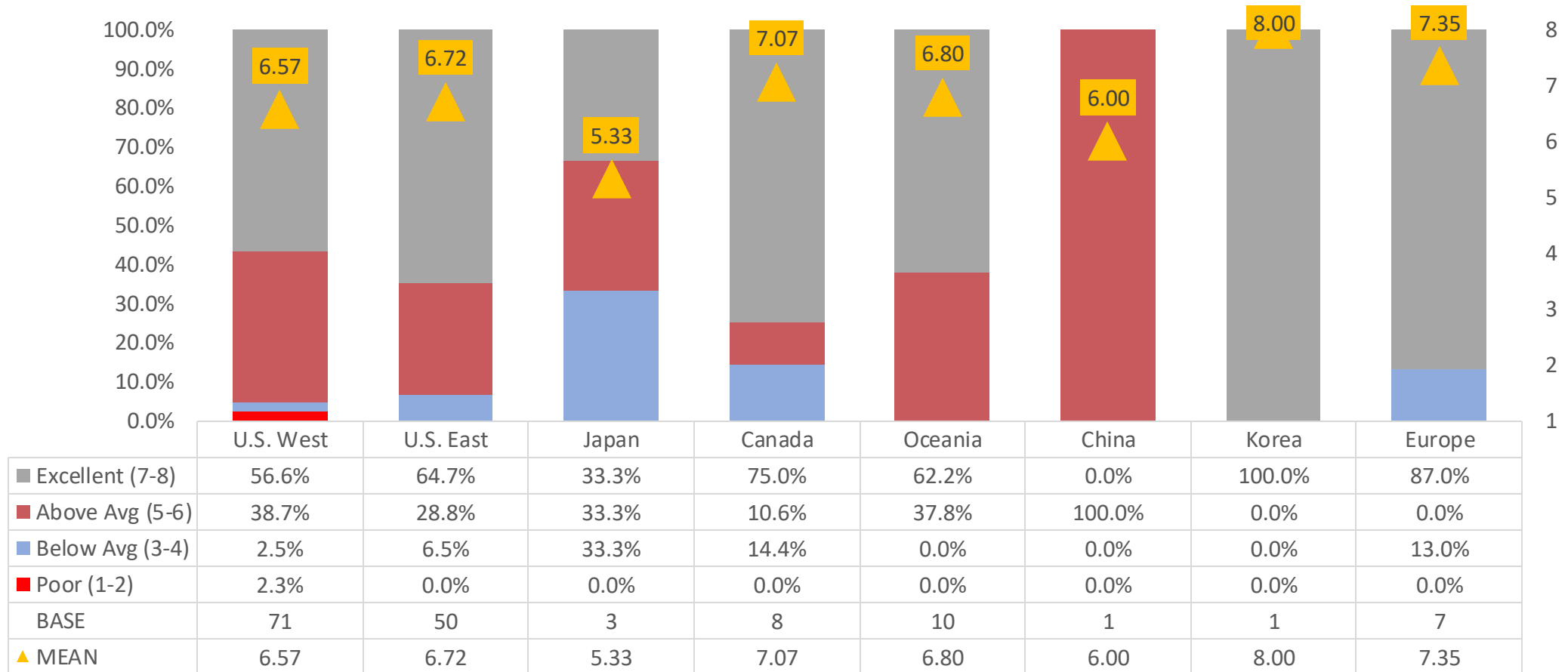
OVERALL ACCESSIBILITY - AIRPORTS

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



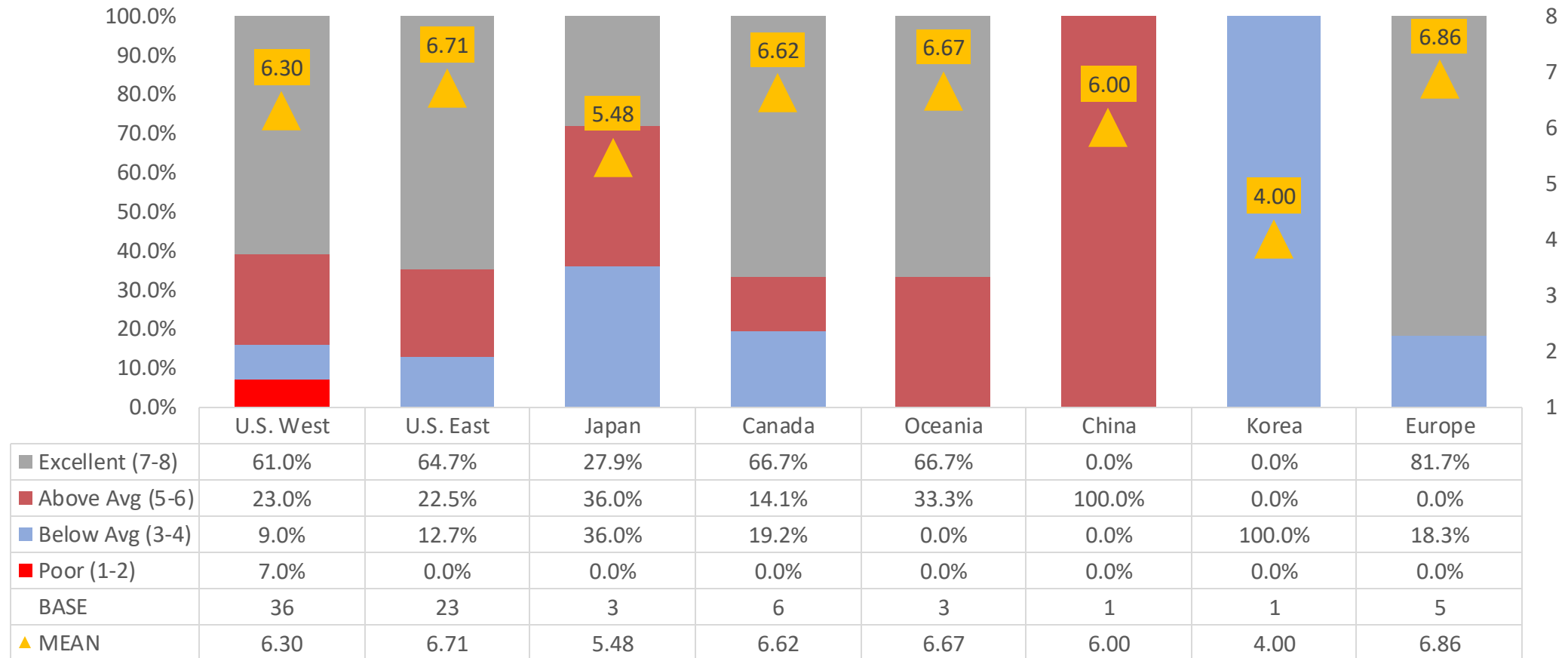
OVERALL ACCESSIBILITY - PRIVATE TRANSPORTATION

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



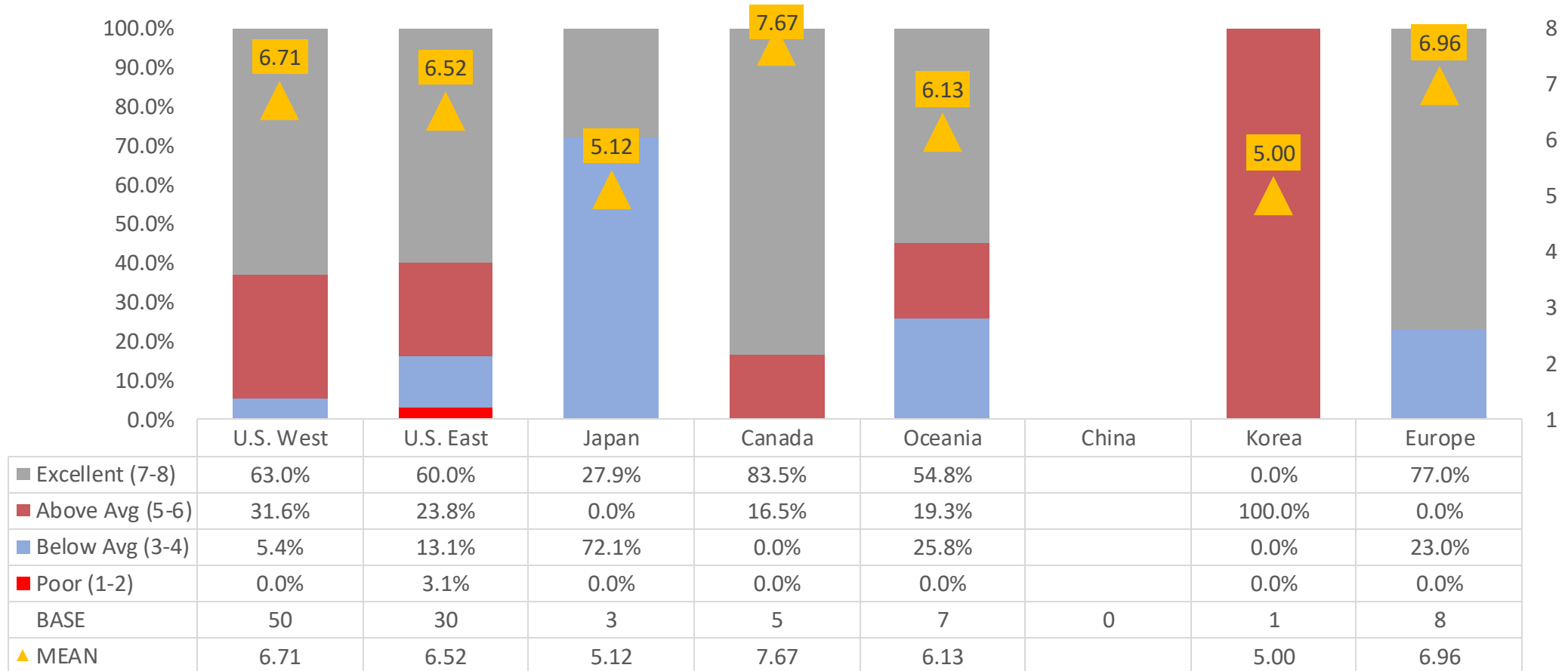
OVERALL ACCESSIBILITY - PUBLIC TRANSPORTATION

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



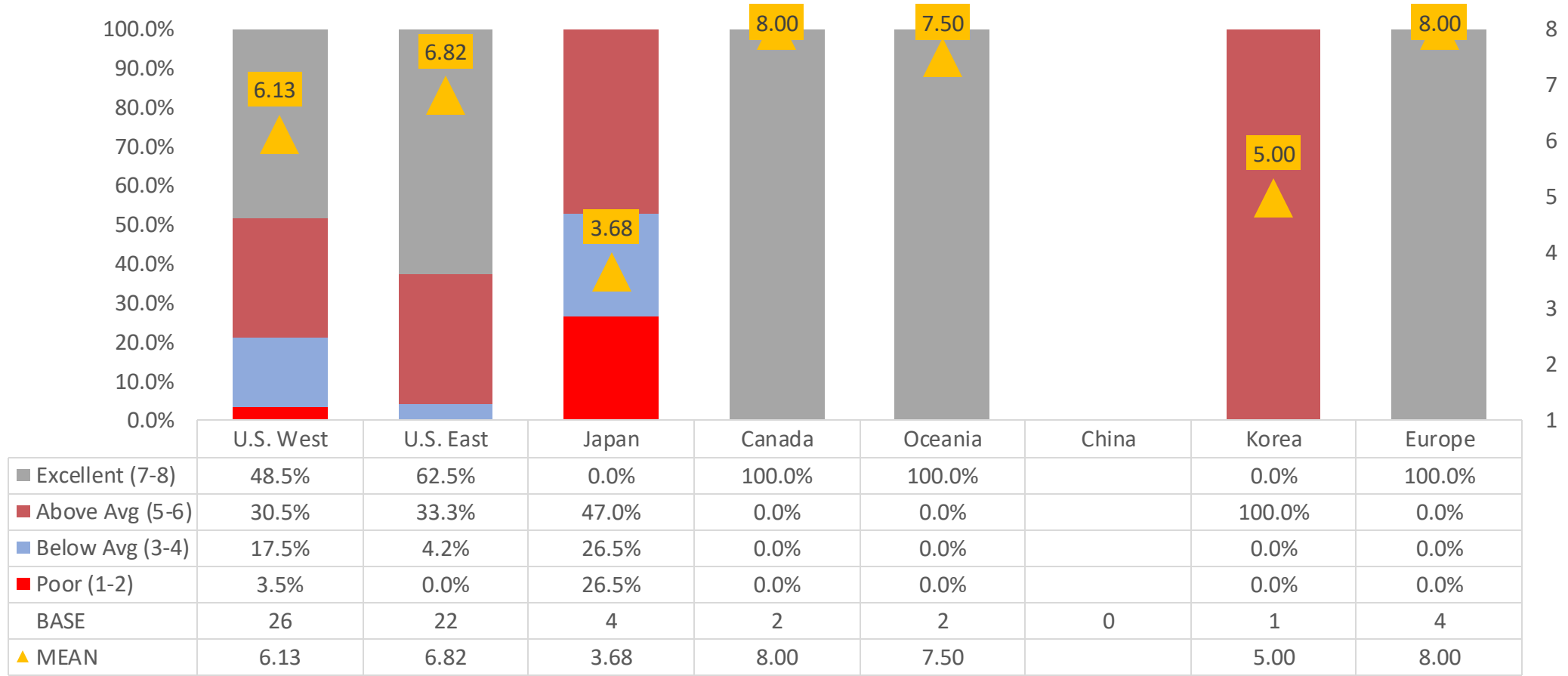
OVERALL ACCESSIBILITY - RIDE SHARE/ CAR SHARE

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



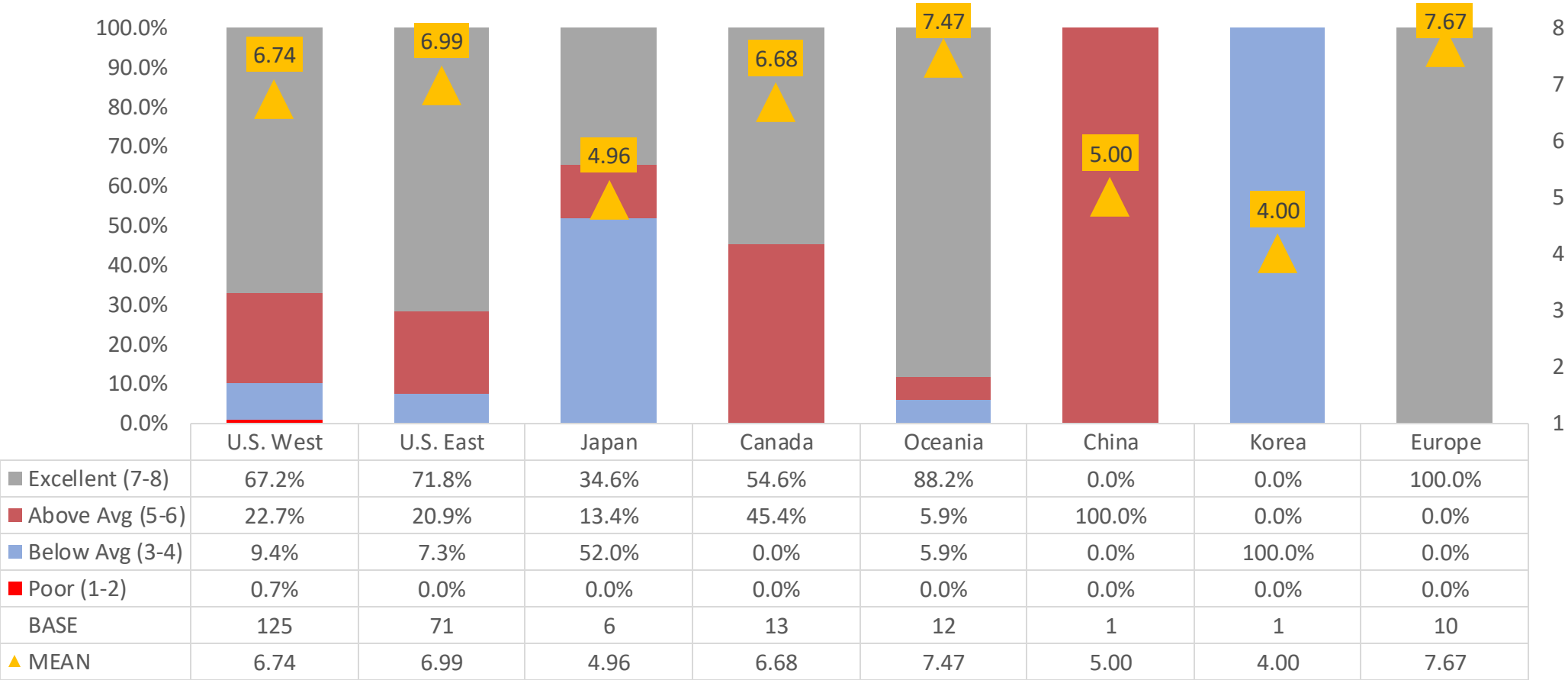
OVERALL ACCESSIBILITY - DEPARTMENT OF AGRICULTURE ANIMAL QUARANTINE

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



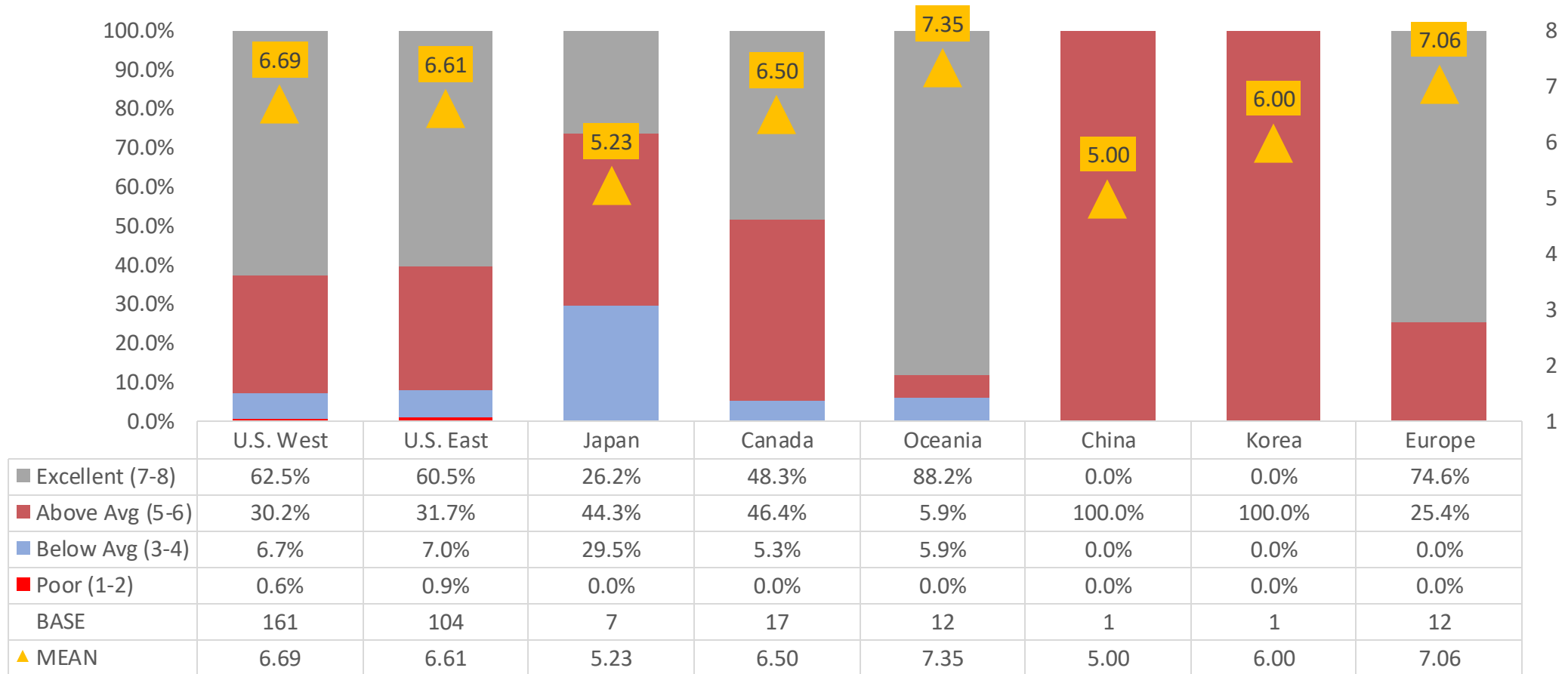
OVERALL ACCESSIBILITY - HOTELS

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



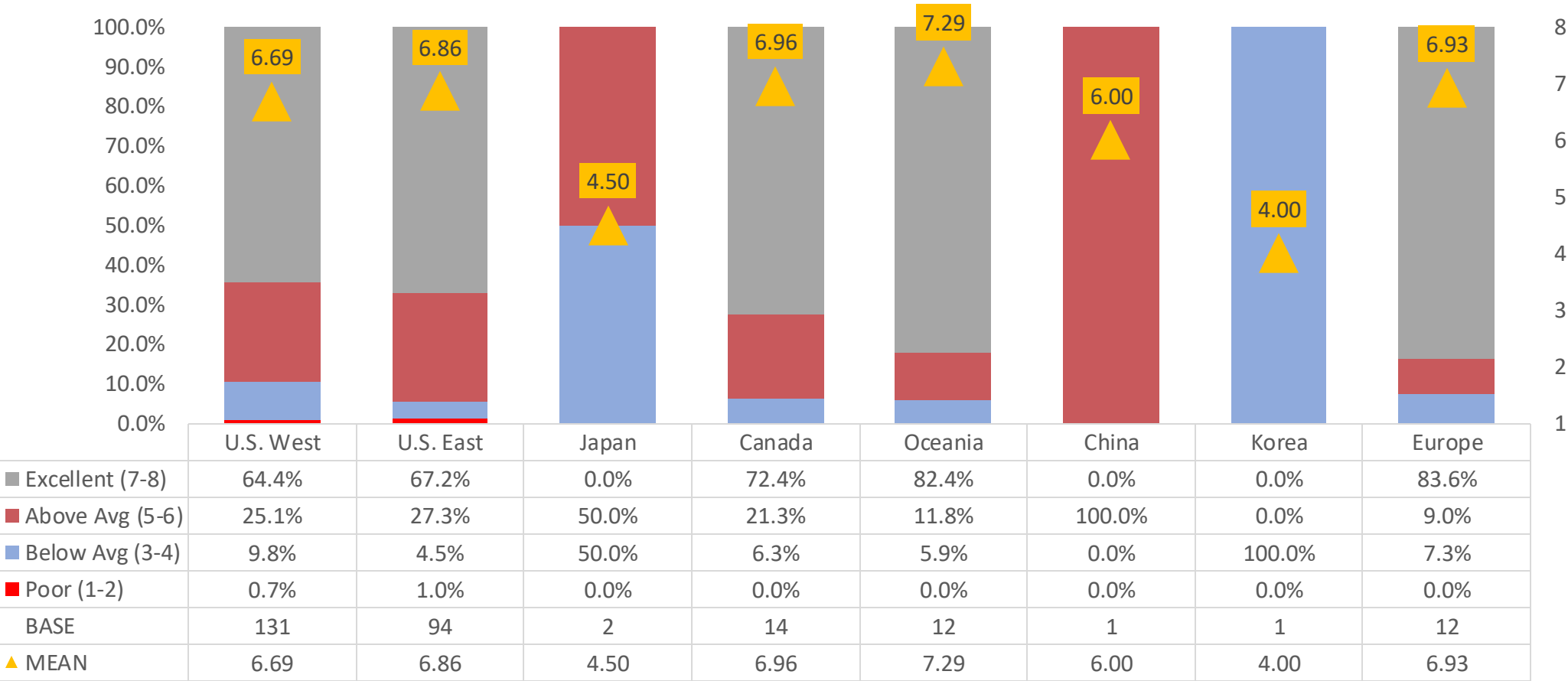
OVERALL ACCESSIBILITY – RESTAURANTS

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



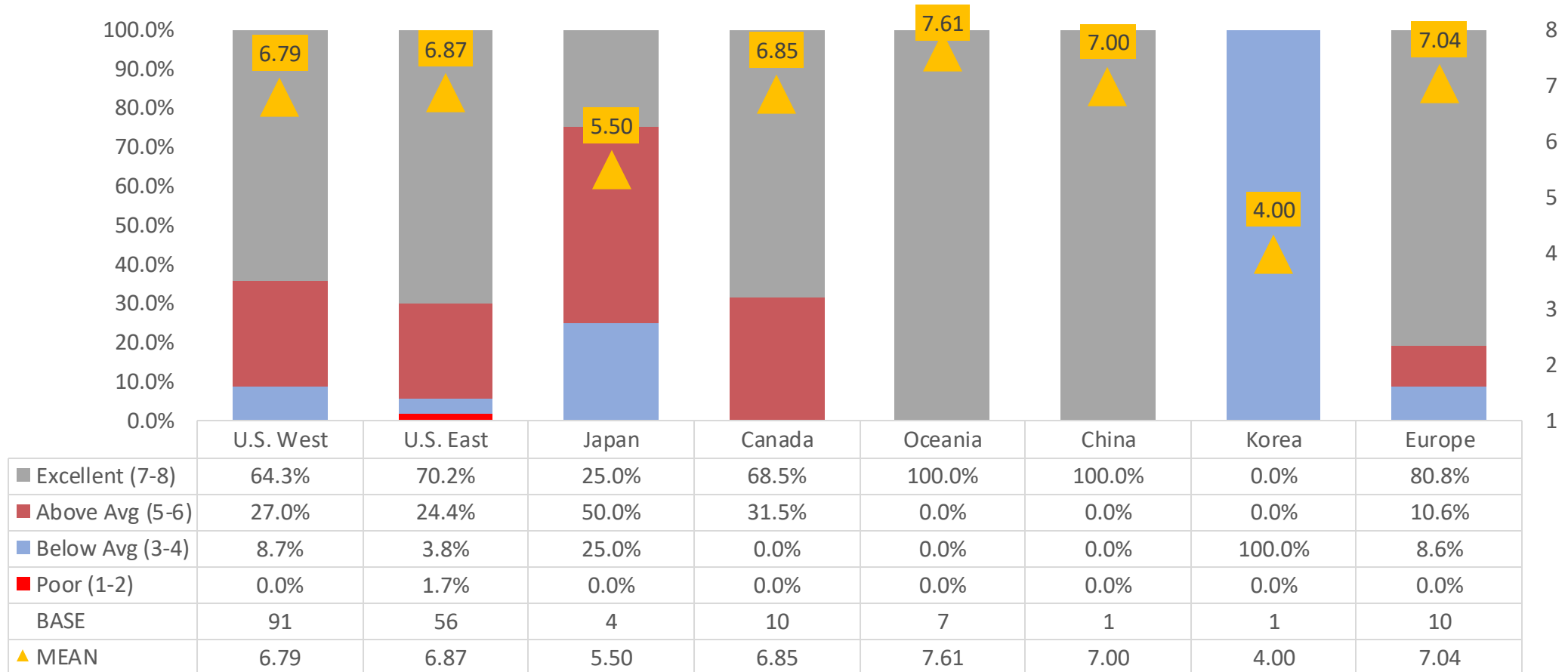
OVERALL ACCESSIBILITY - PUBLIC ATTRACTIONS

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



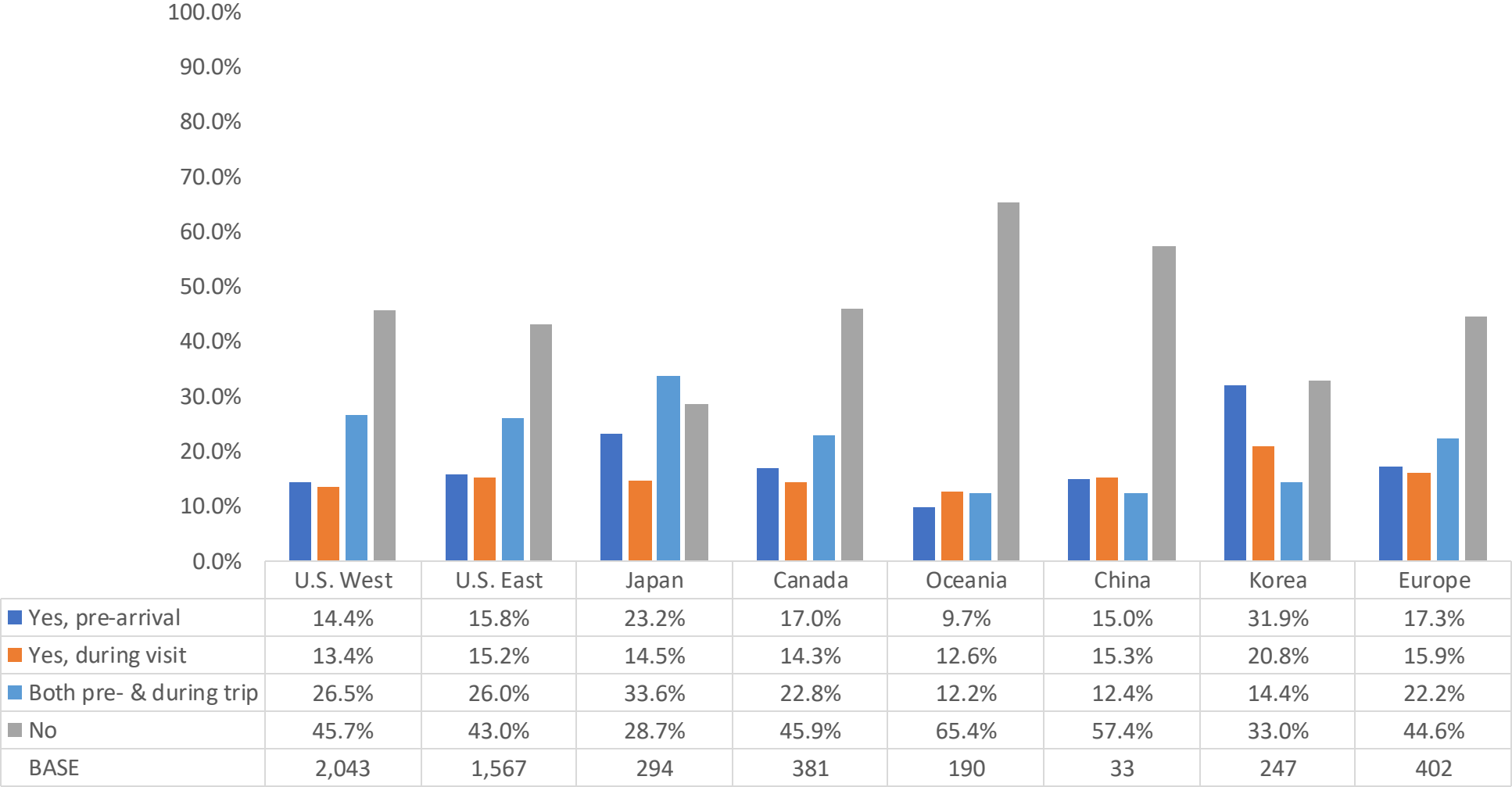
OVERALL ACCESSIBILITY - PRIVATE ATTRACTIONS

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

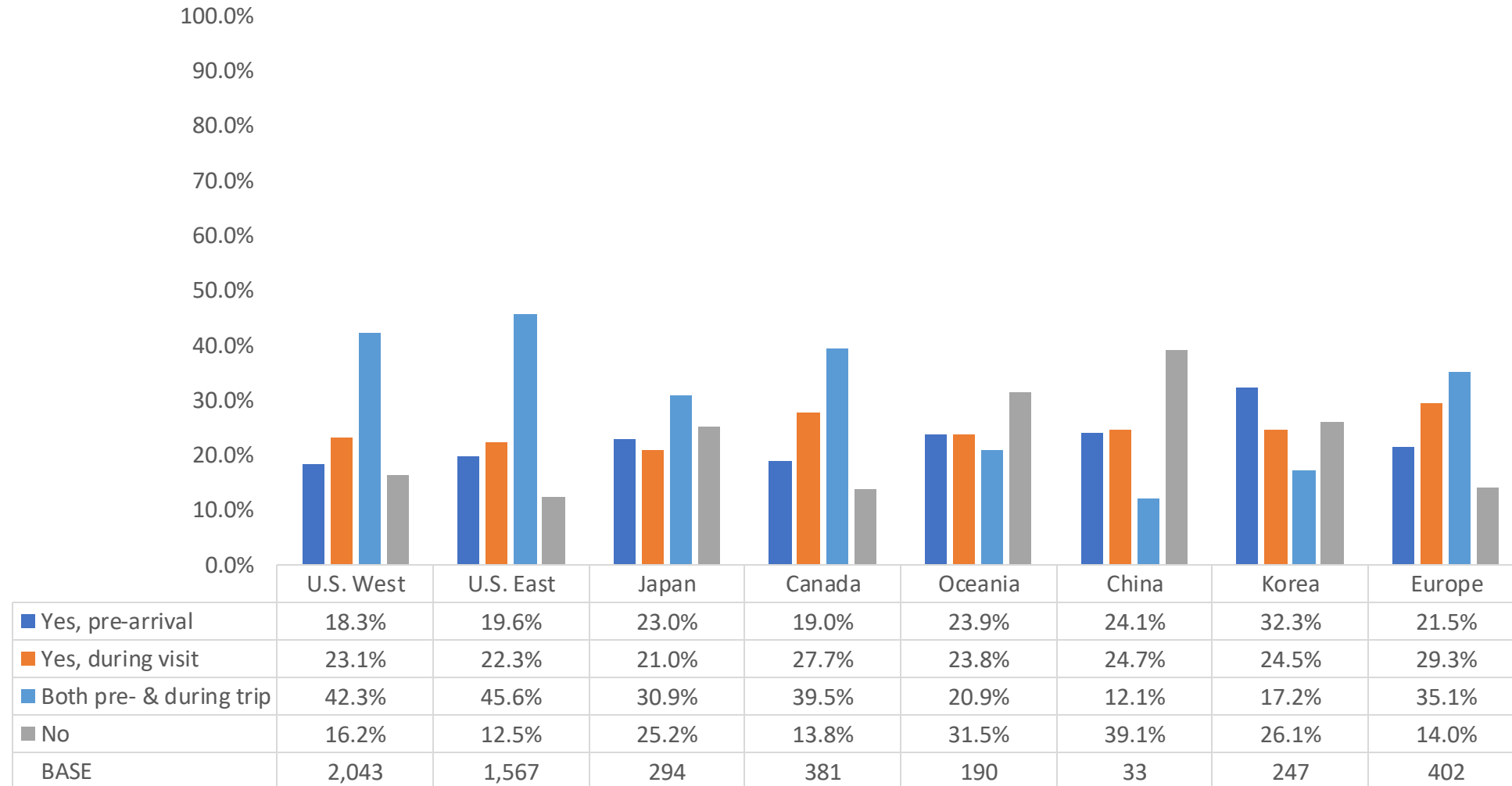


Section 4 – Messaging

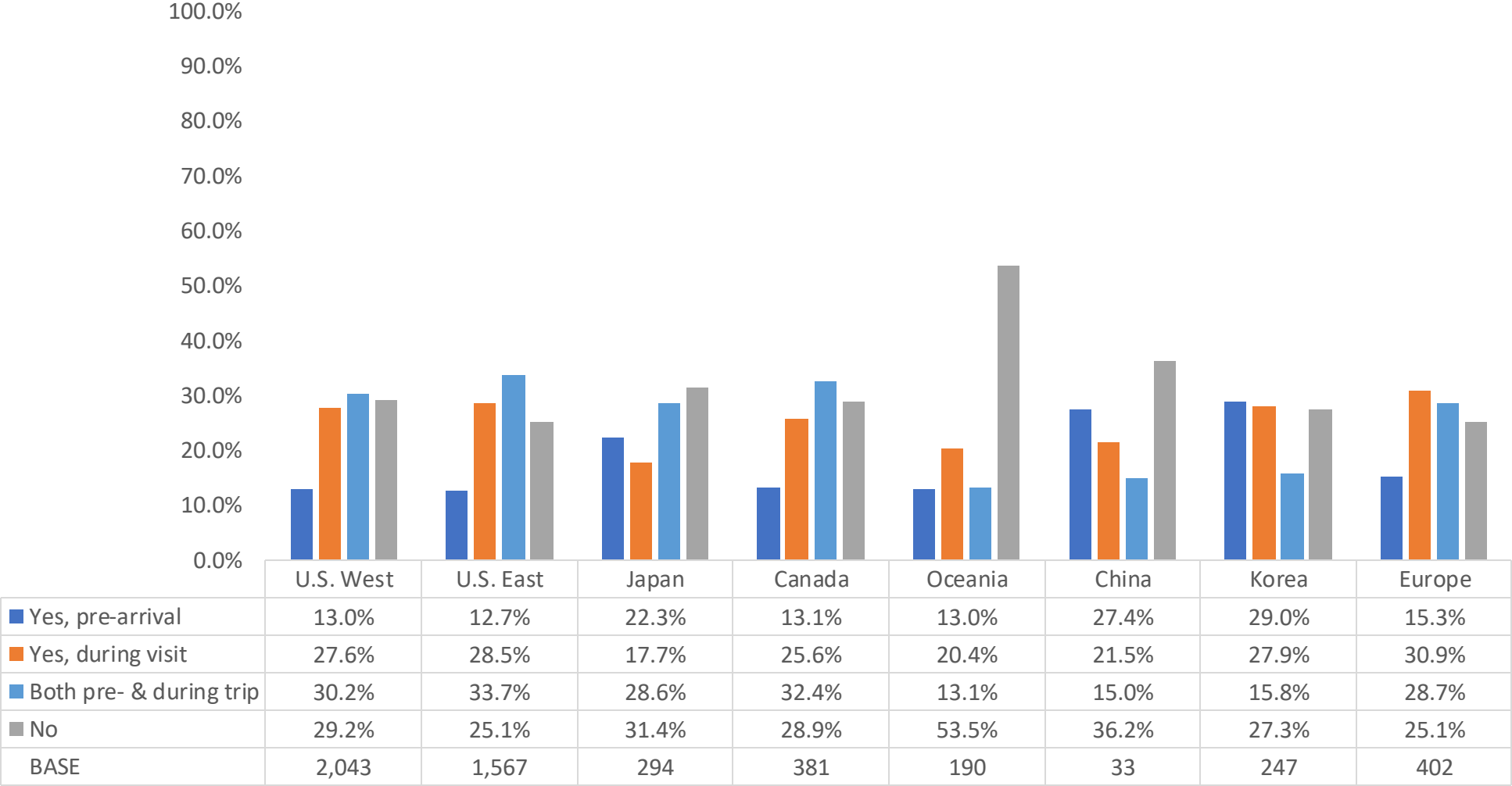
SAFE AND RESPONSIBLE TRAVEL



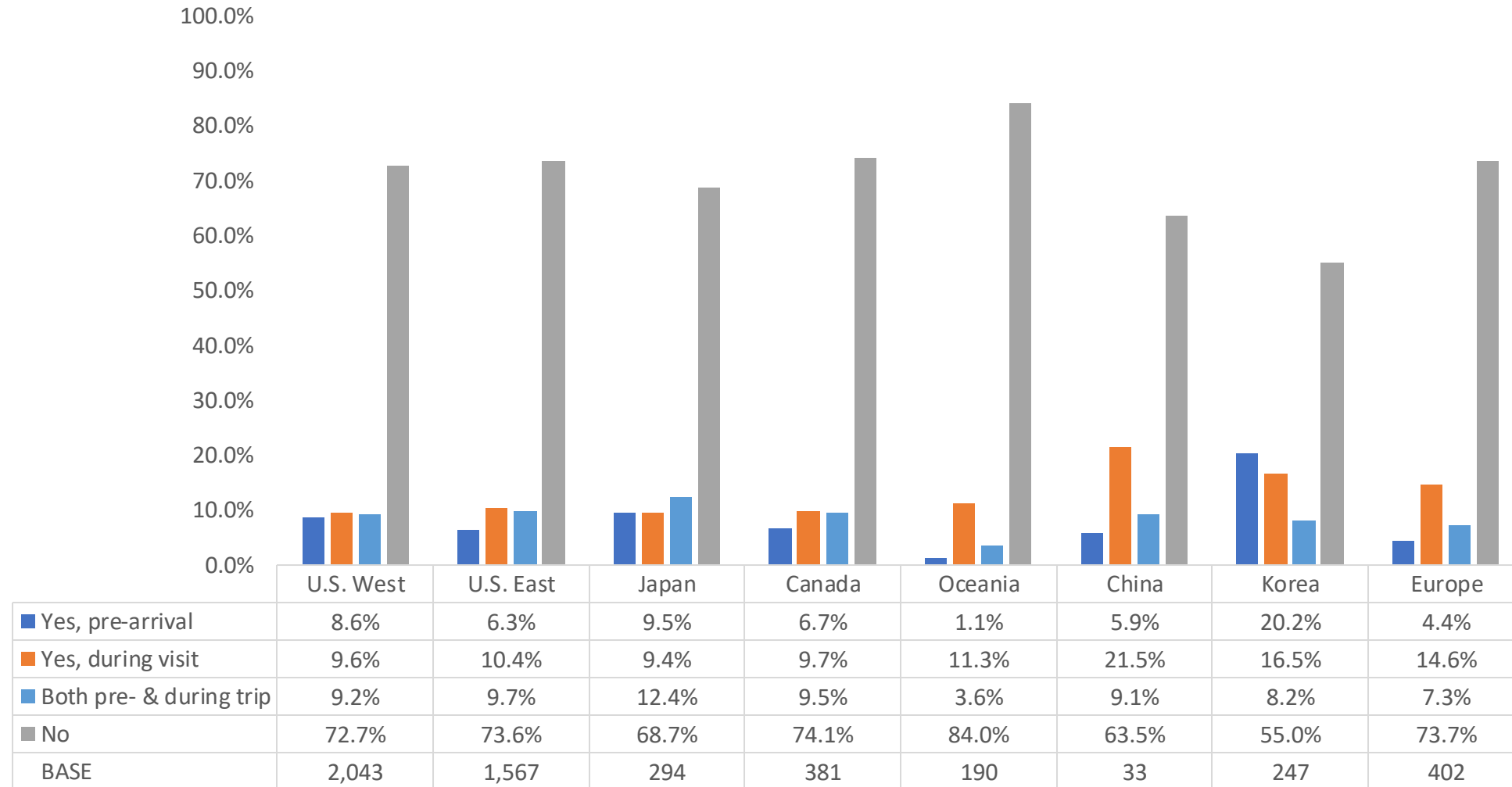
CARING FOR AND RESPECTING HAWAI'I'S CULTURE, PEOPLE AND ENVIRONMENT



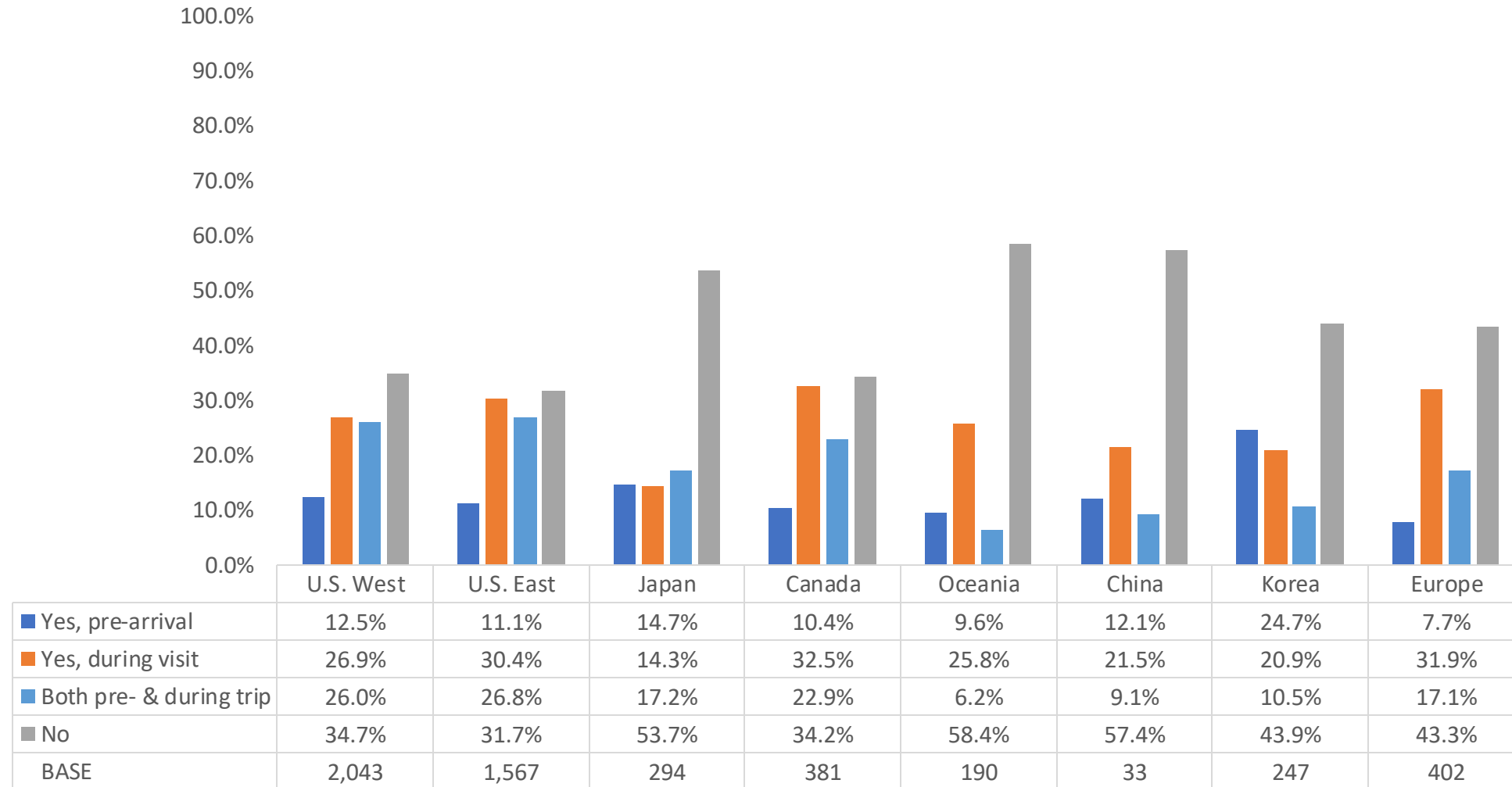
OCEAN AND HIKING SAFETY



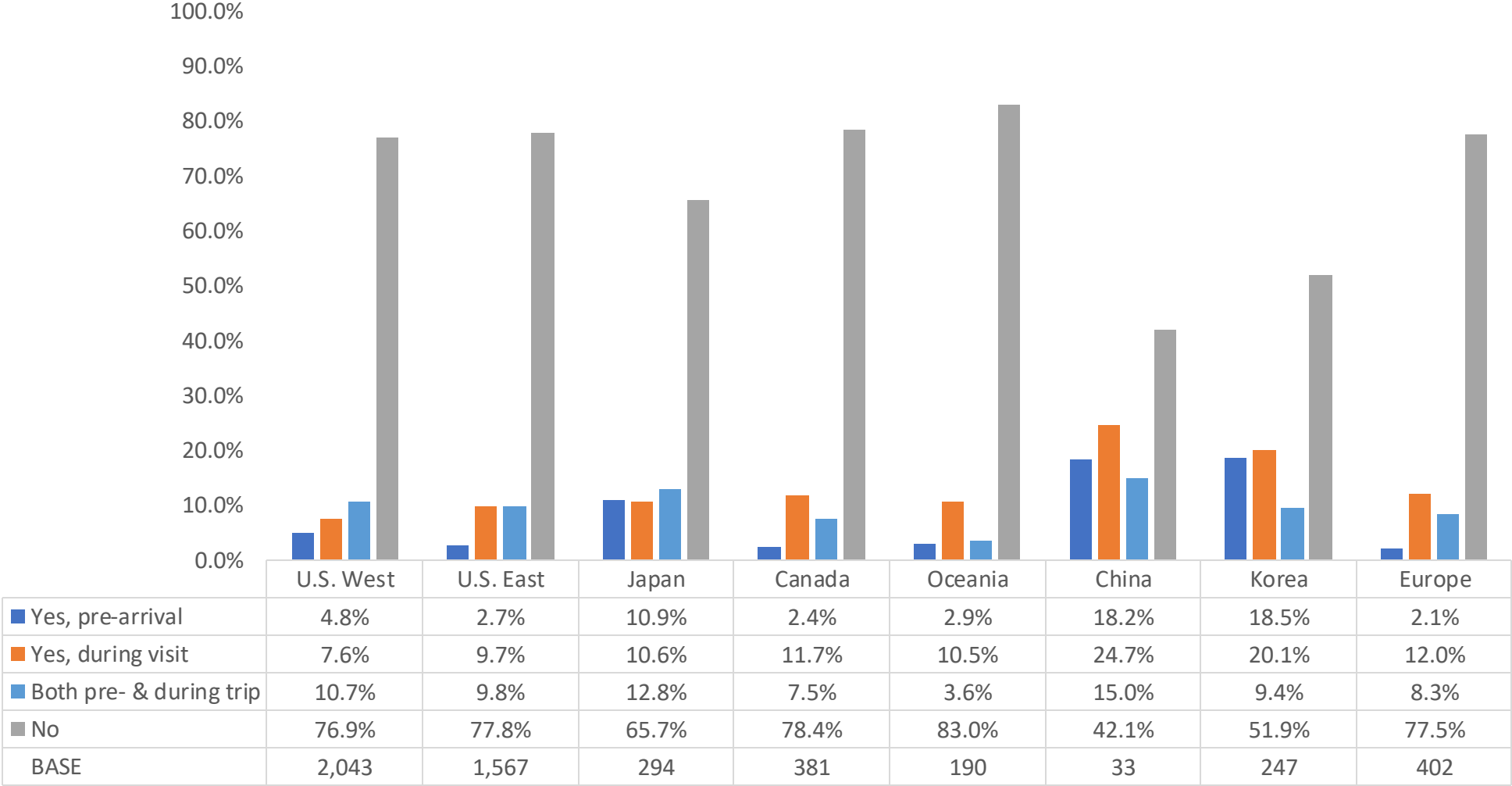
VOLUNTEER / GIVE-BACK OPPORTUNITIES



SUPPORT LOCAL / SHOP LOCAL

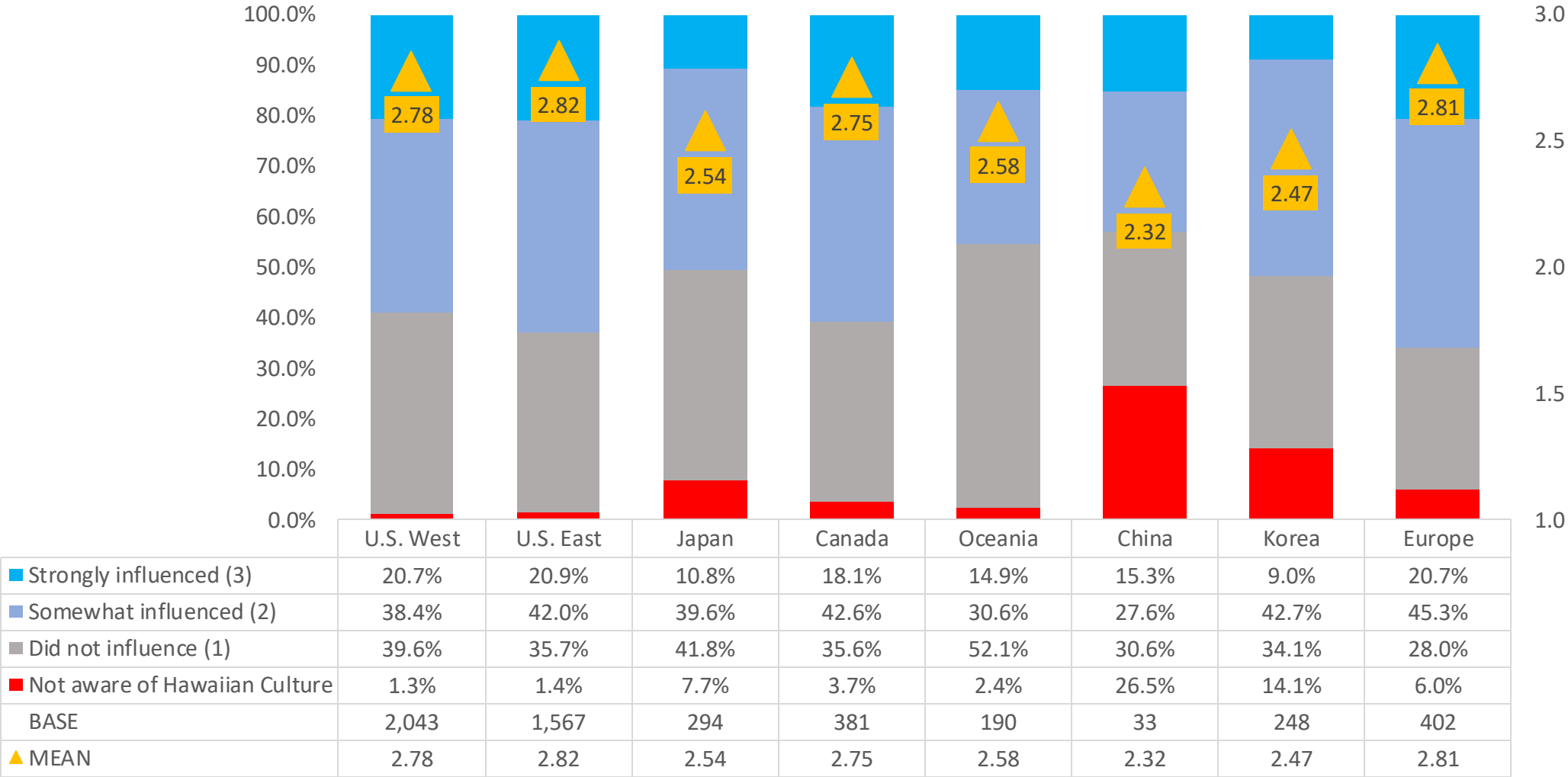


MĀLAMA HAWAI‘I



Section 5 – Hawaiian Culture

HAWAIIAN CULTURE IMPACT ON TRIP PLANNING



Section 6 – Destination Drivers

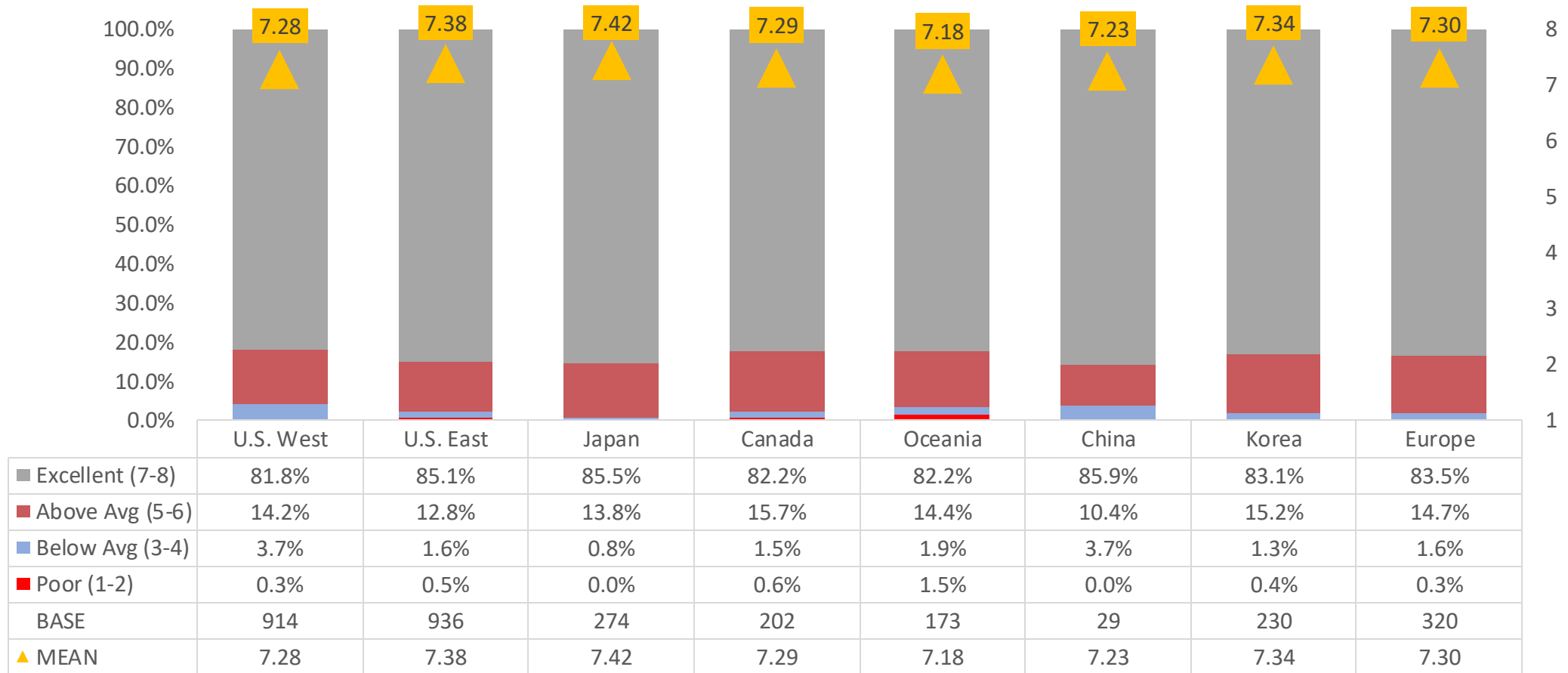
DESTINATION DRIVERS

	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

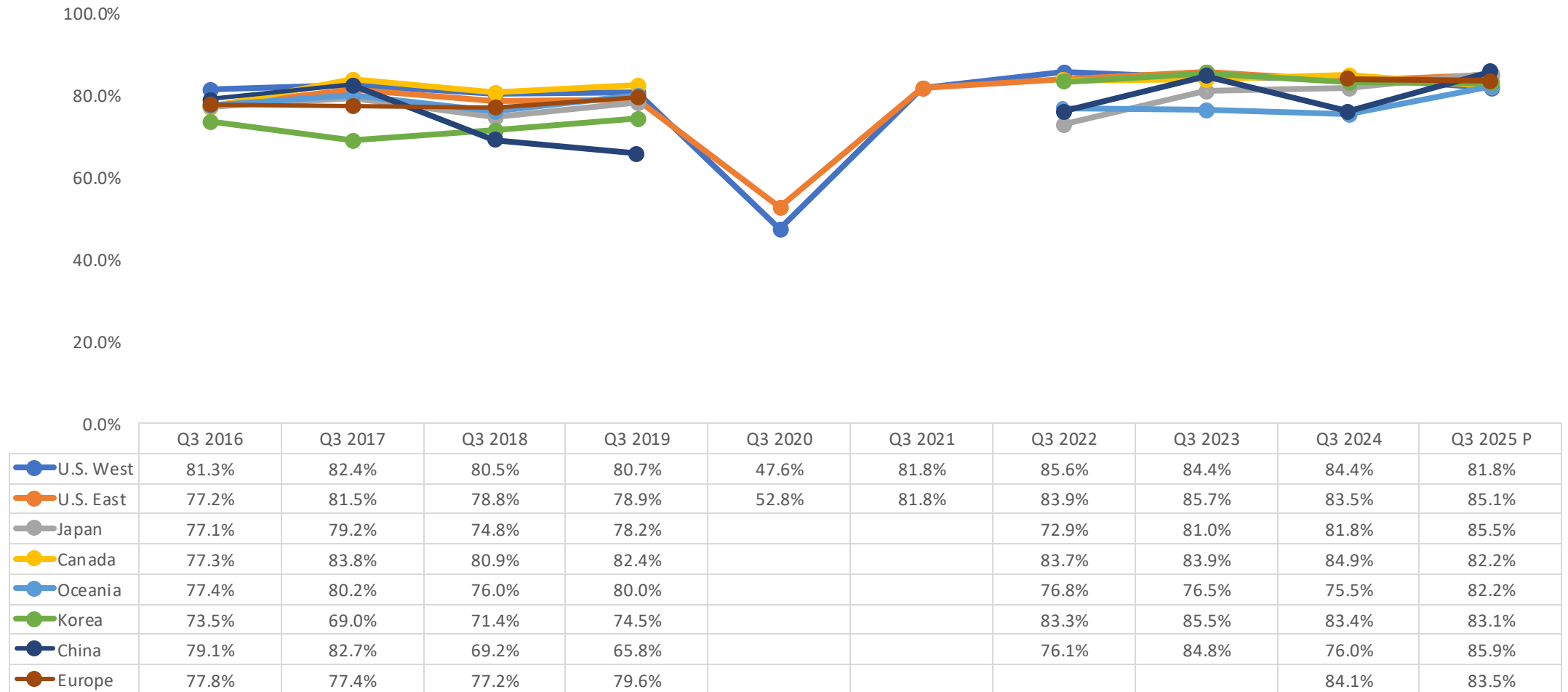


SATISFACTION – O‘AHU

- ***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)



P= Preliminary Data

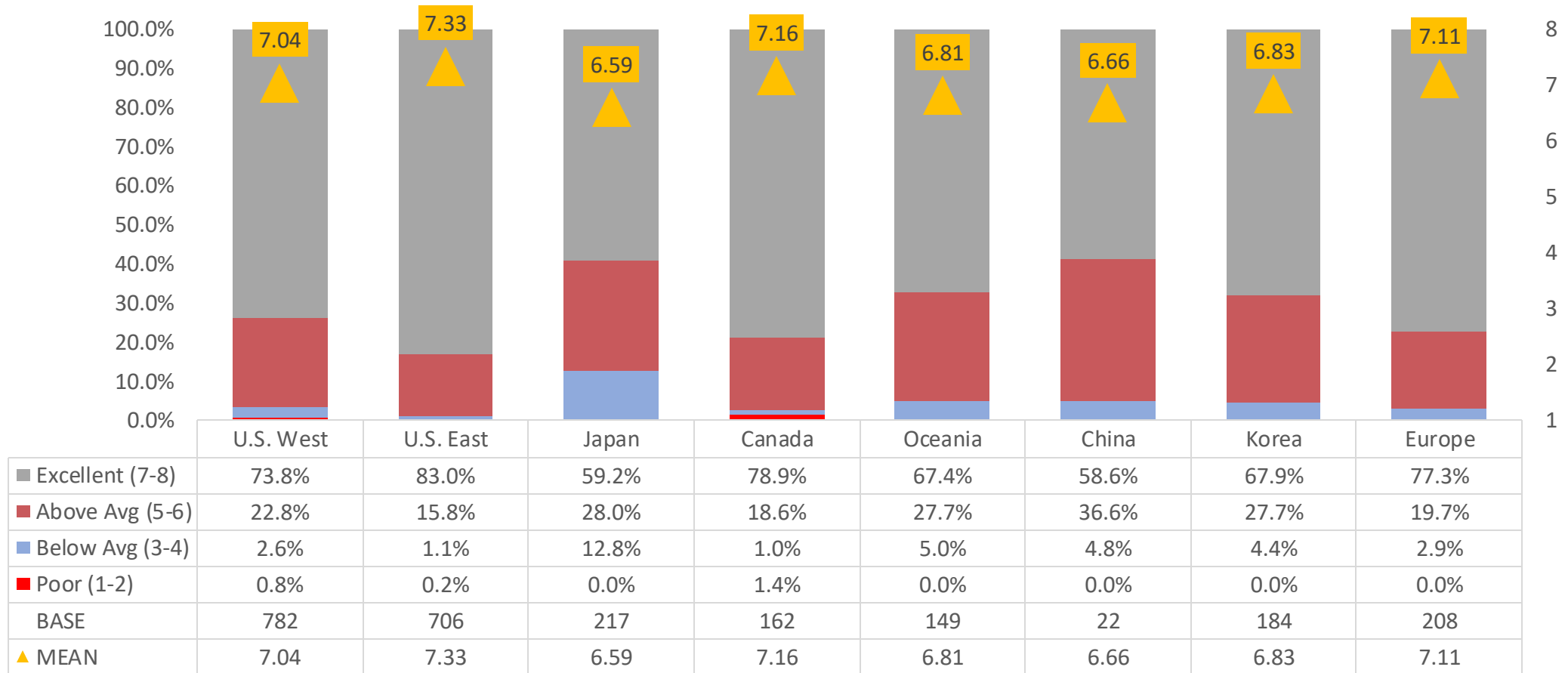
Q. How would you rate your most recent trip to the state of Hawai'i? How would you rate your experience on___?

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.



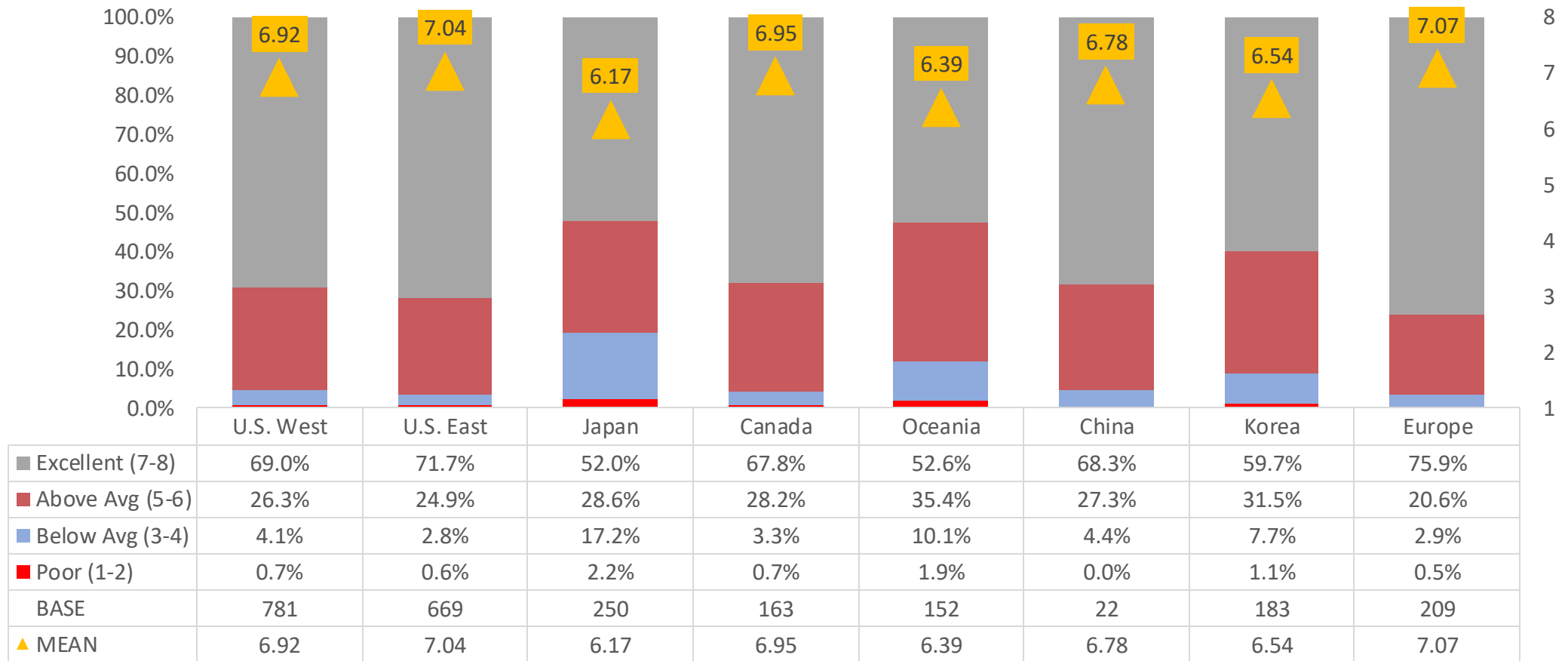
ENTERTAINMENT/ ATTRACTIONS - O'AHU

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



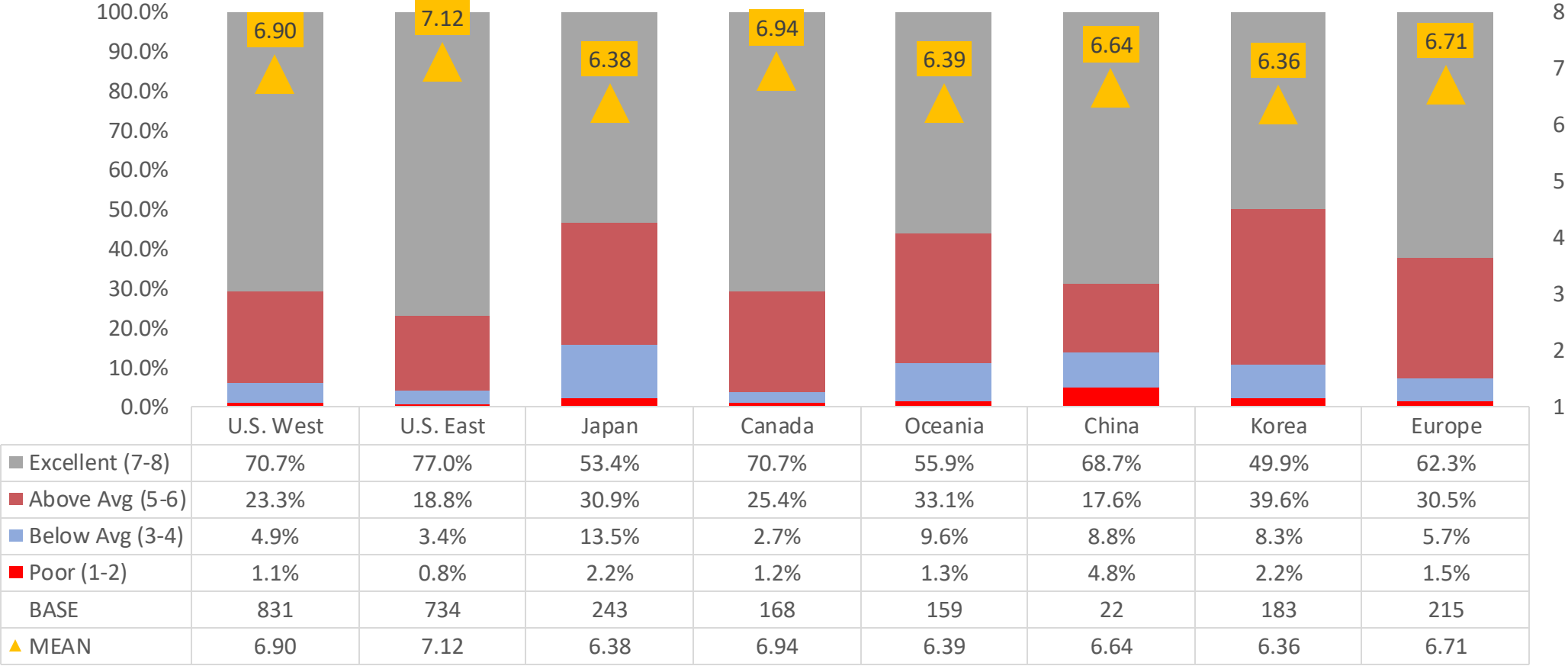
SHOPPING - O'AHU

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



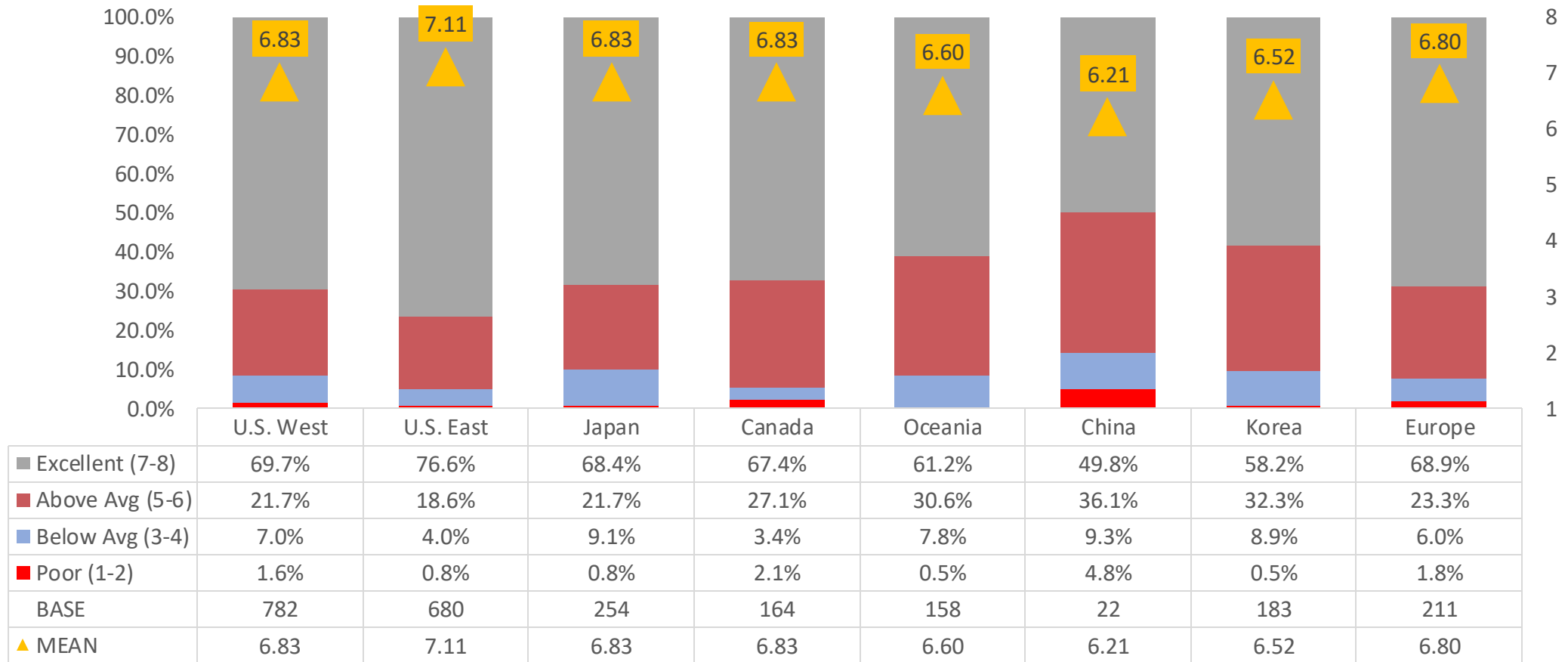
DINING/ FOOD & BEVERAGES - O'AHU

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



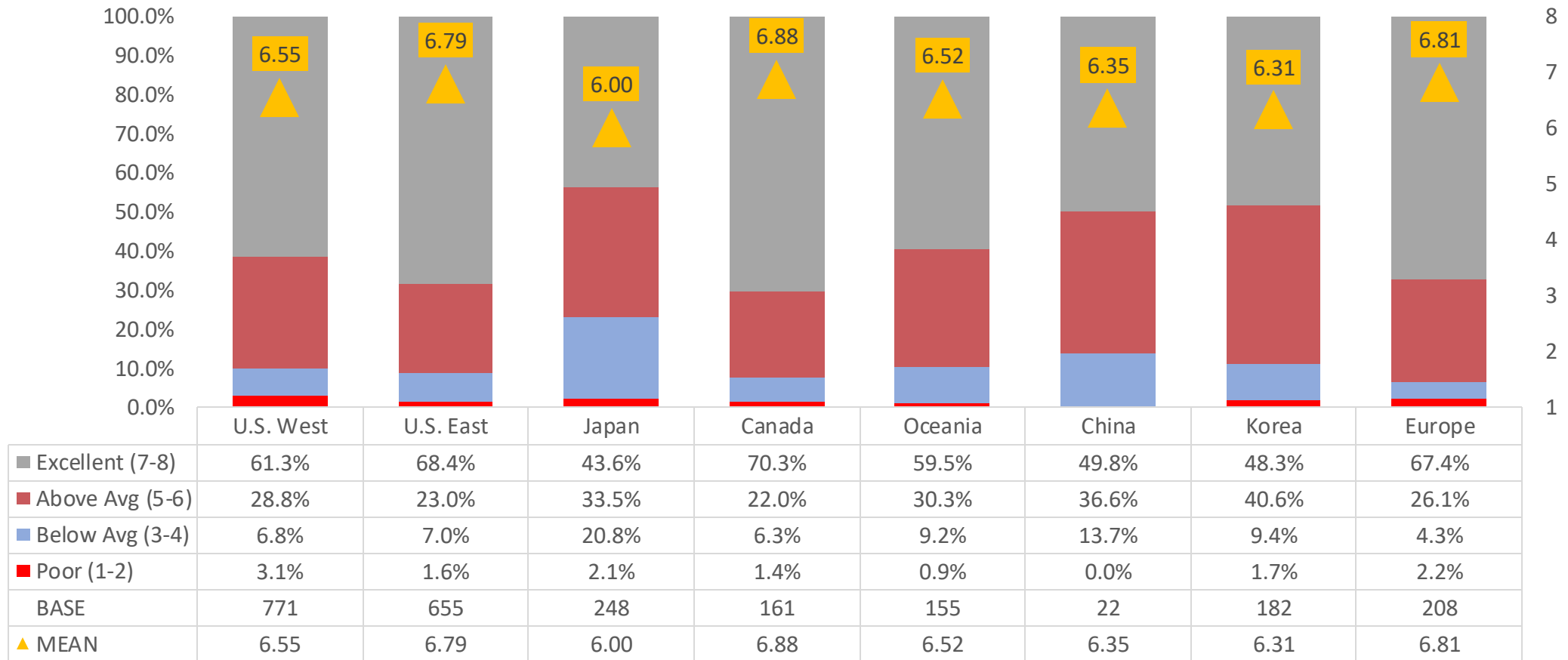
LODGING/ ACOMMODATIONS - O'AHU

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



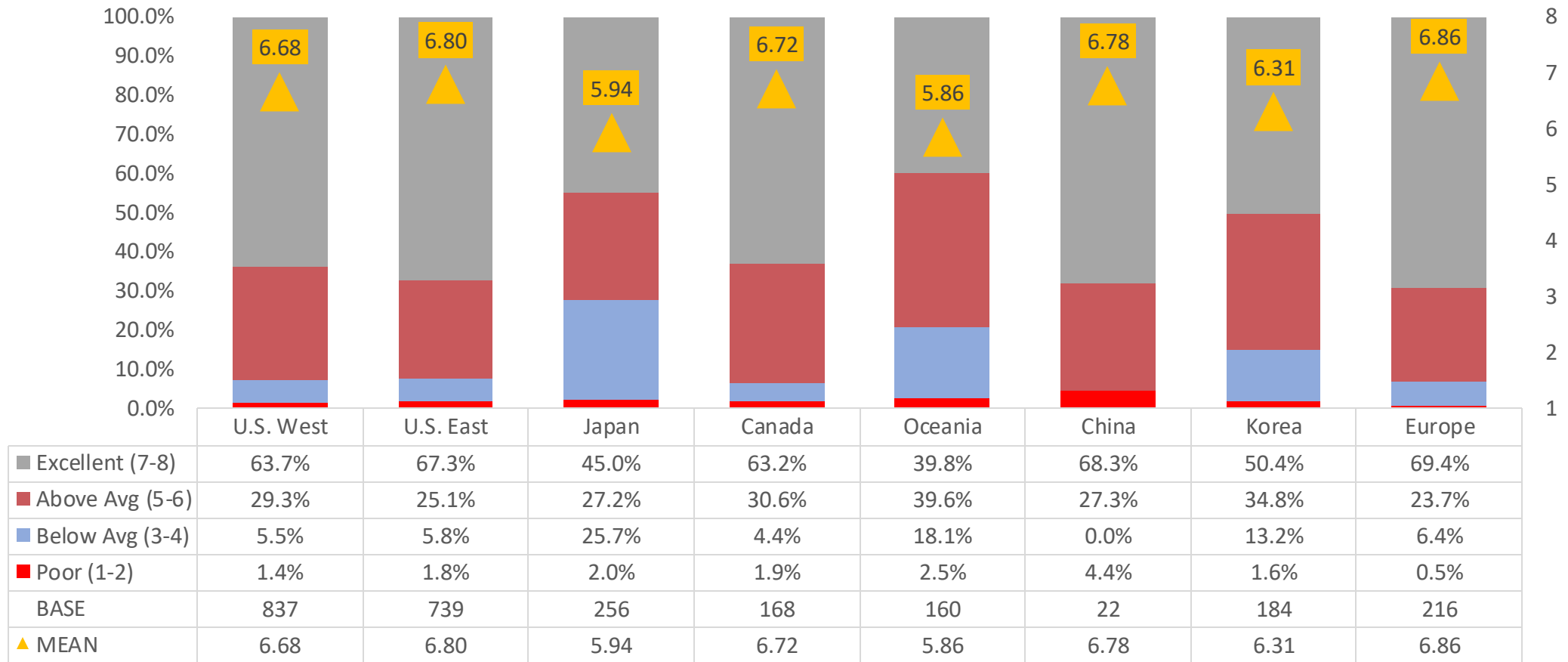
TRANSPORTATION ON ISLAND - O'AHU

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



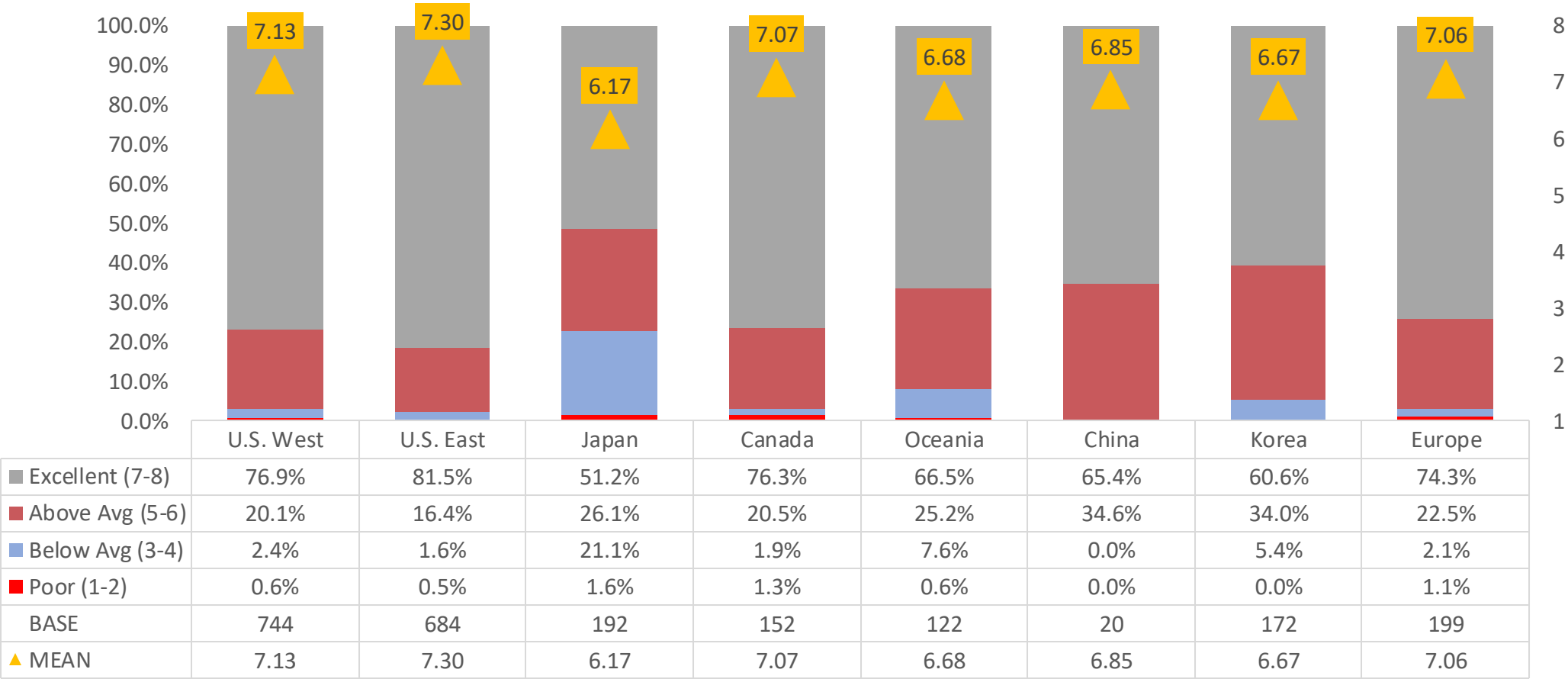
AIRPORT - O'AHU

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



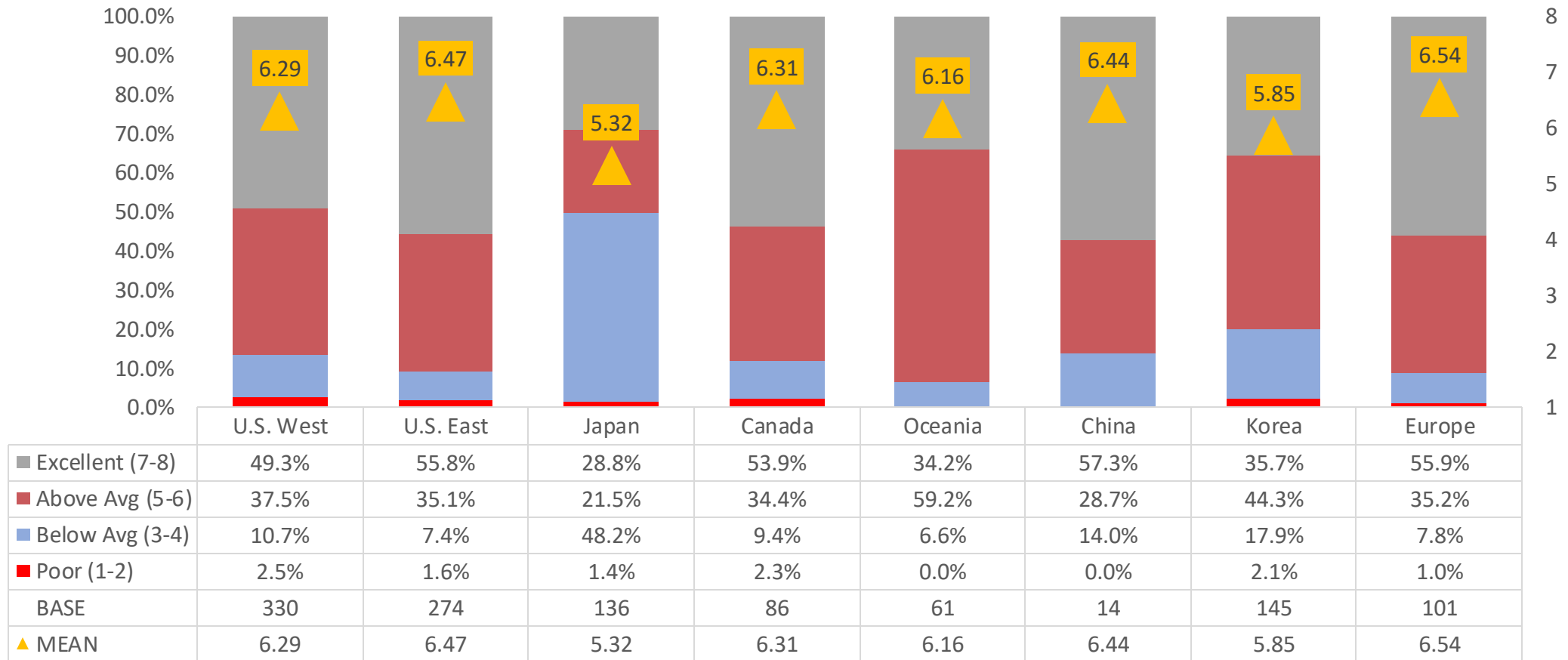
CULTURAL EXPERIENCES - O‘AHU

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



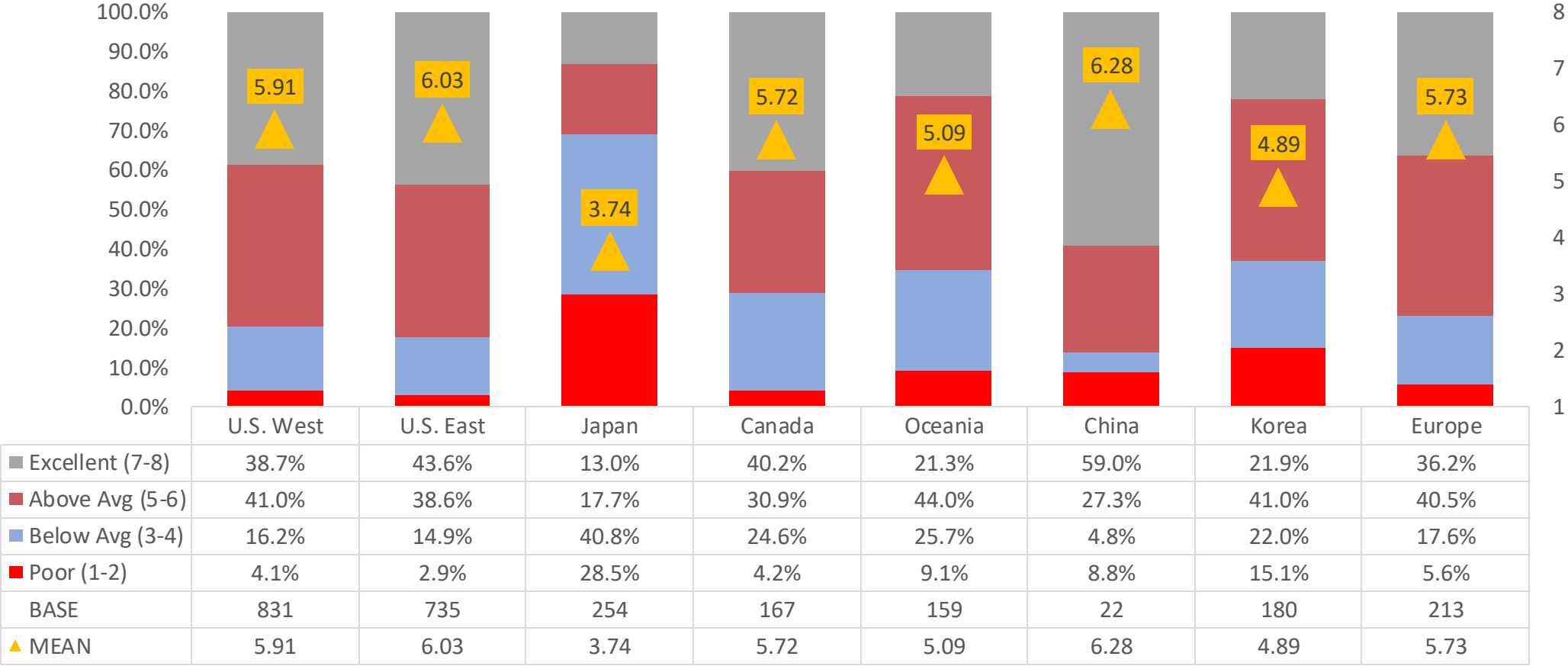
VOLUNTEER EXPERIENCES - O'AHU

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



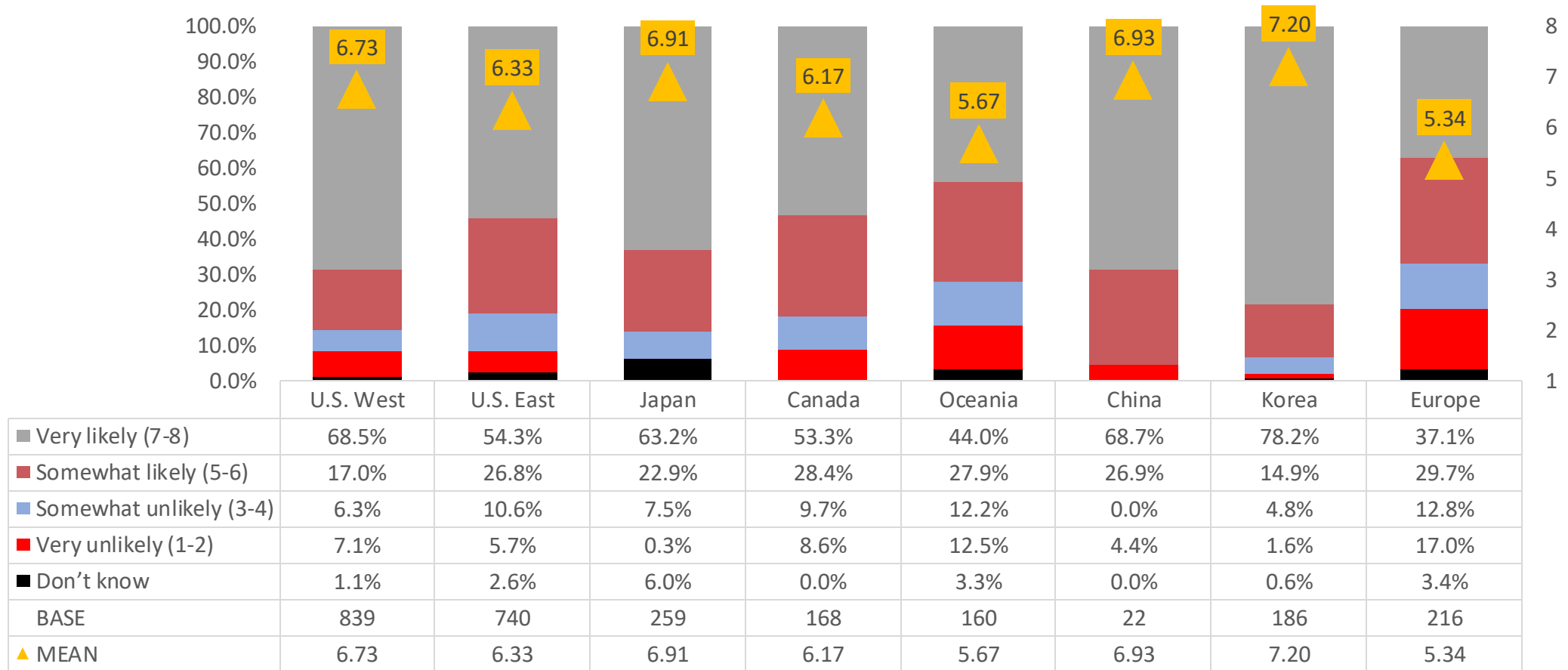
OVERALL VALUE FOR THE MONEY – O‘AHU

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%

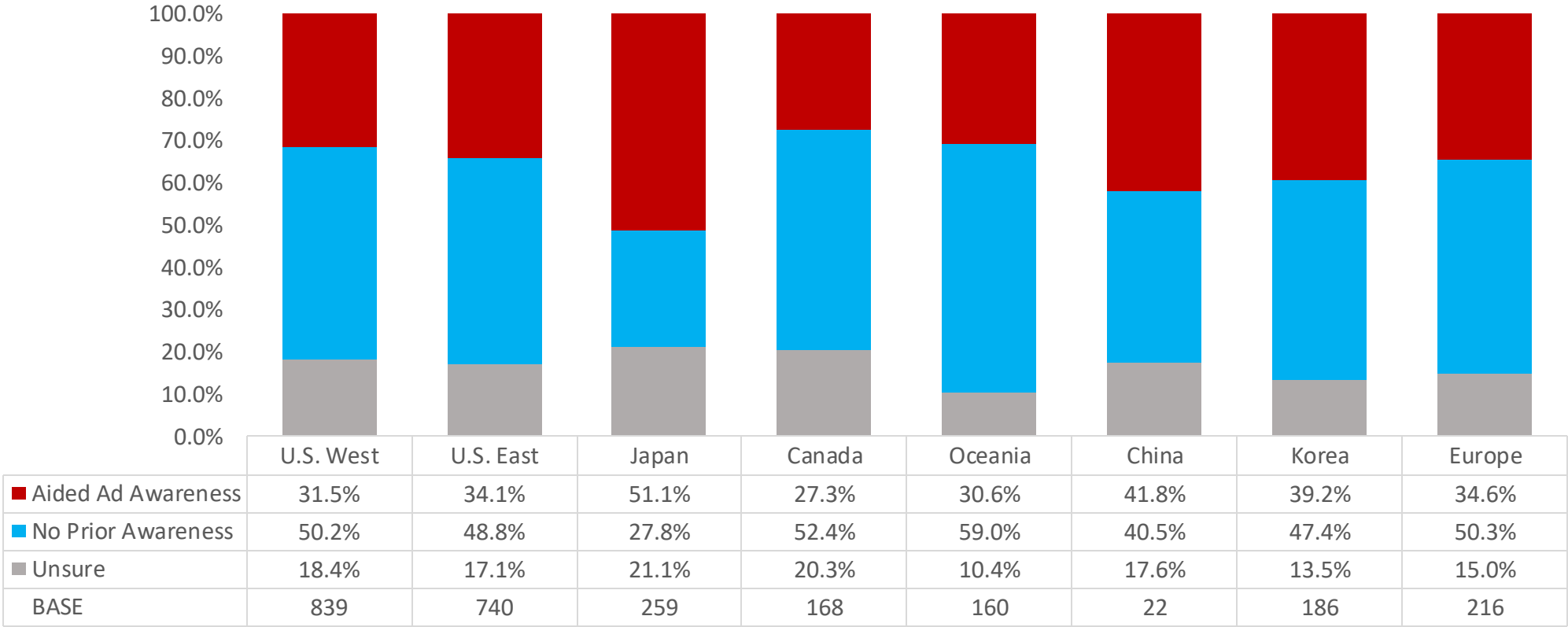
P= Preliminary Data

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.



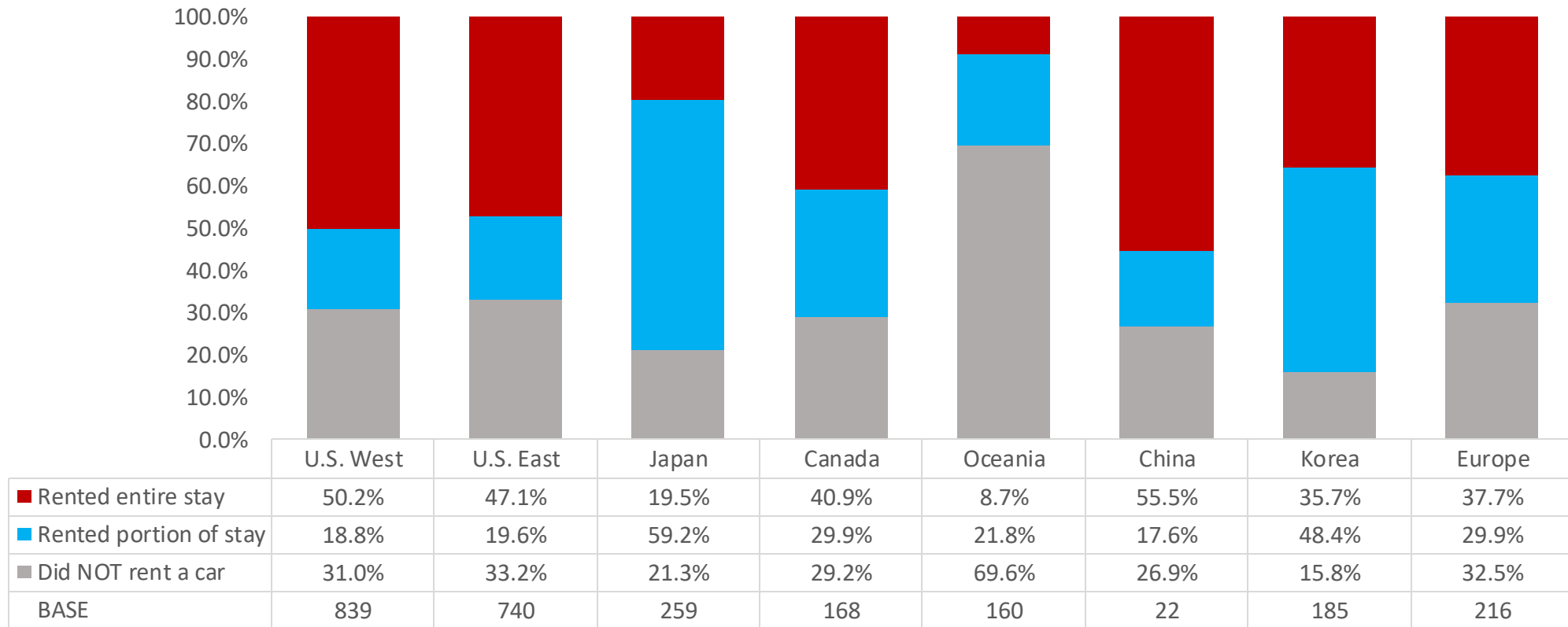
AIDED ADVERTISING AWARENESS - O'AHU



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

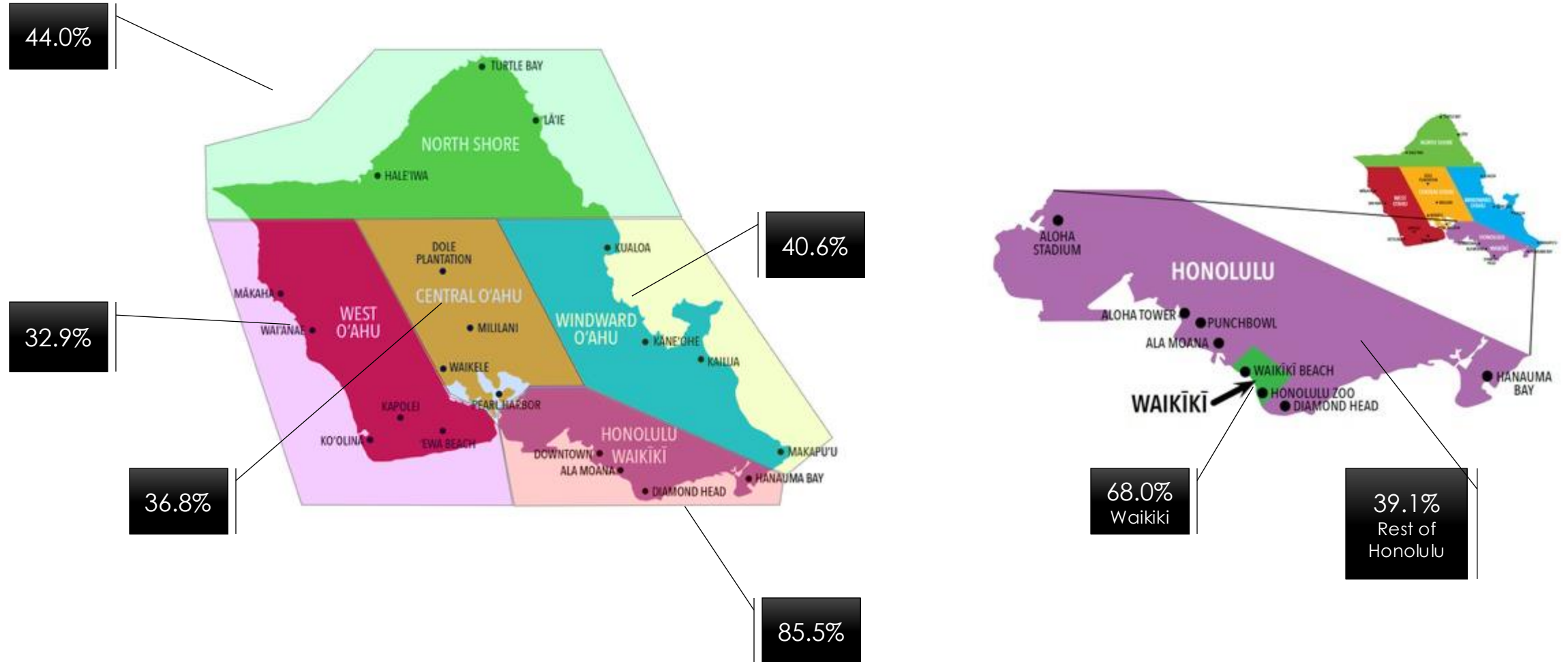


REASONS FOR PARTIAL RENTAL CAR - O'AHU

	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

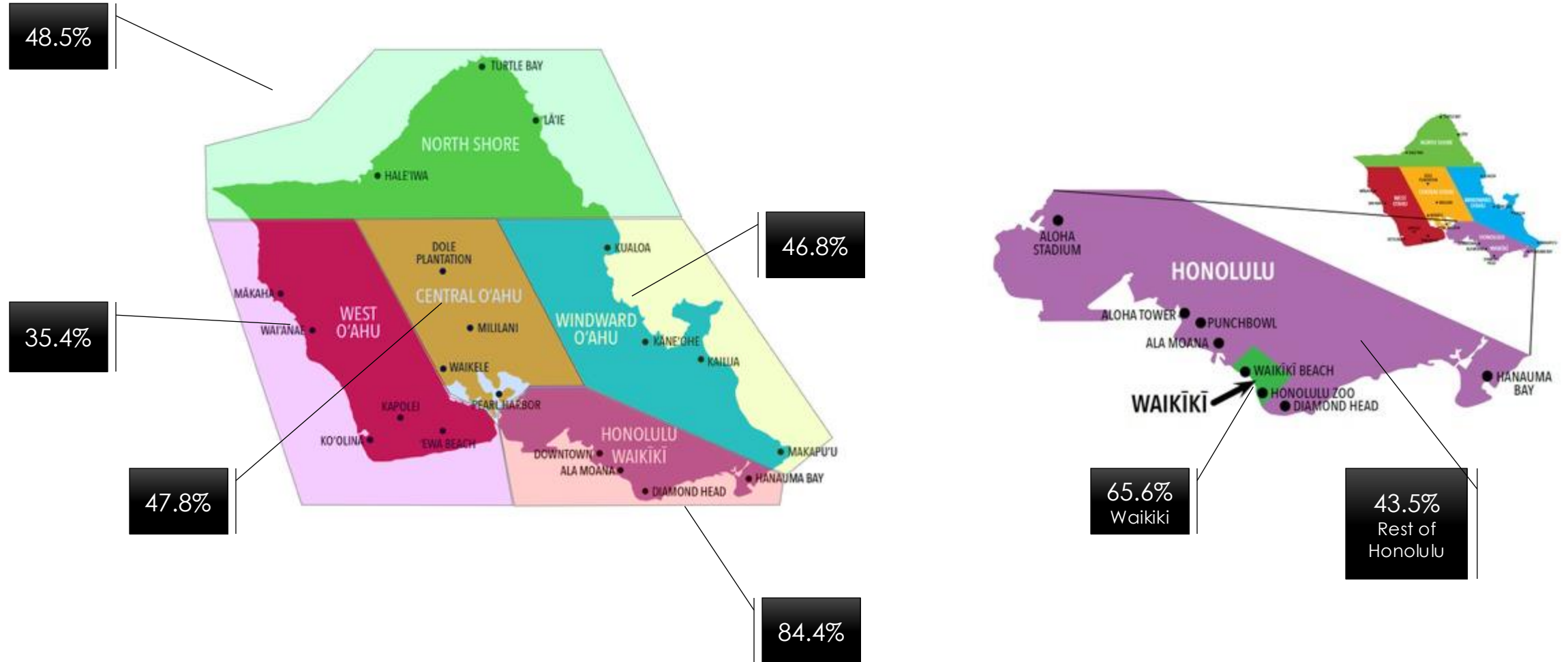
AREAS VISITED - O'AHU

U.S. WEST



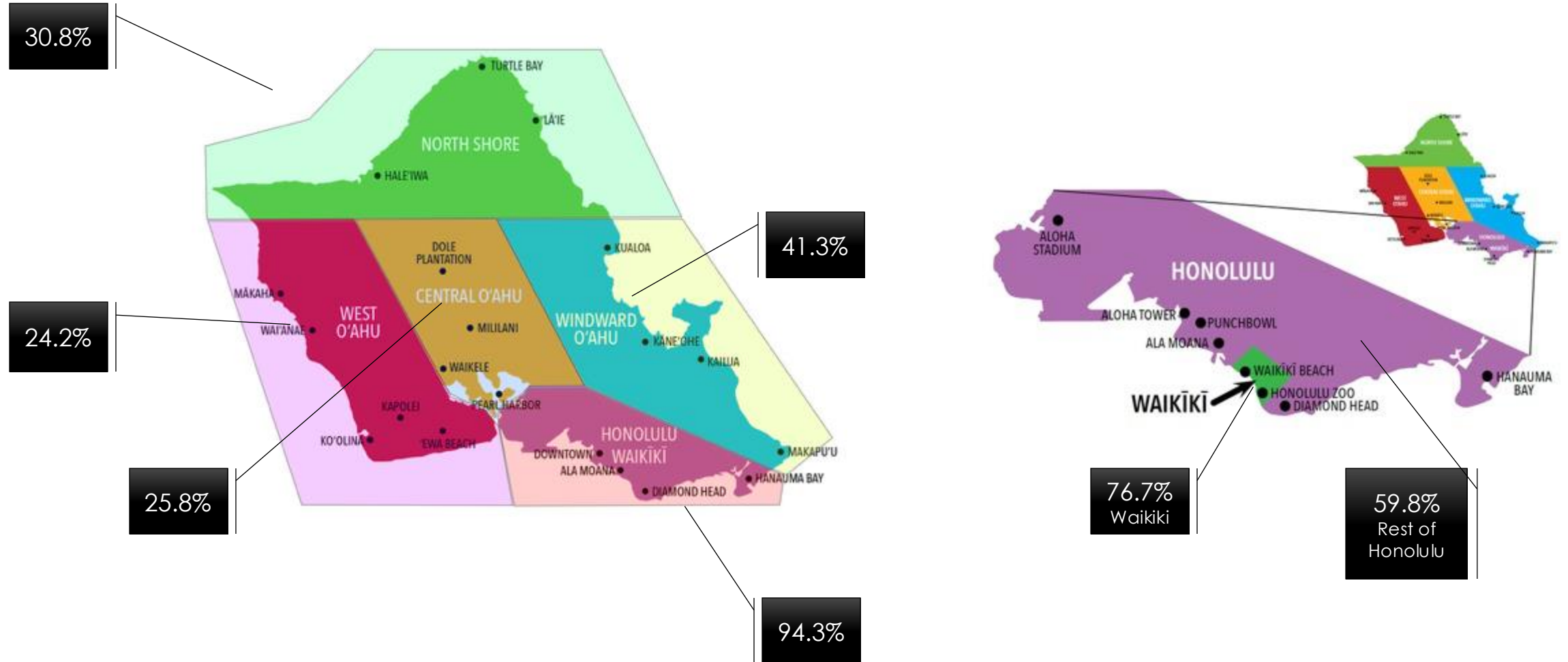
AREAS VISITED - O'AHU

U.S. EAST

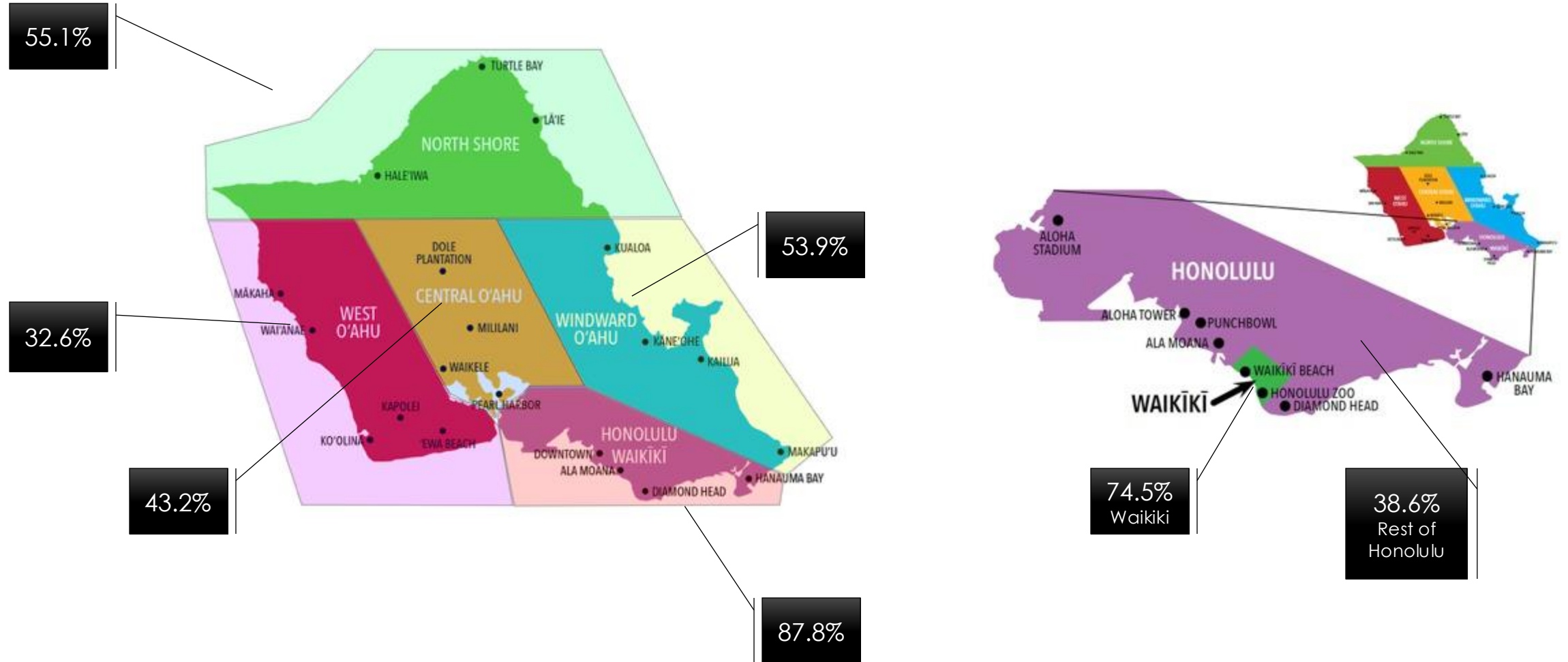


AREAS VISITED - O'AHU

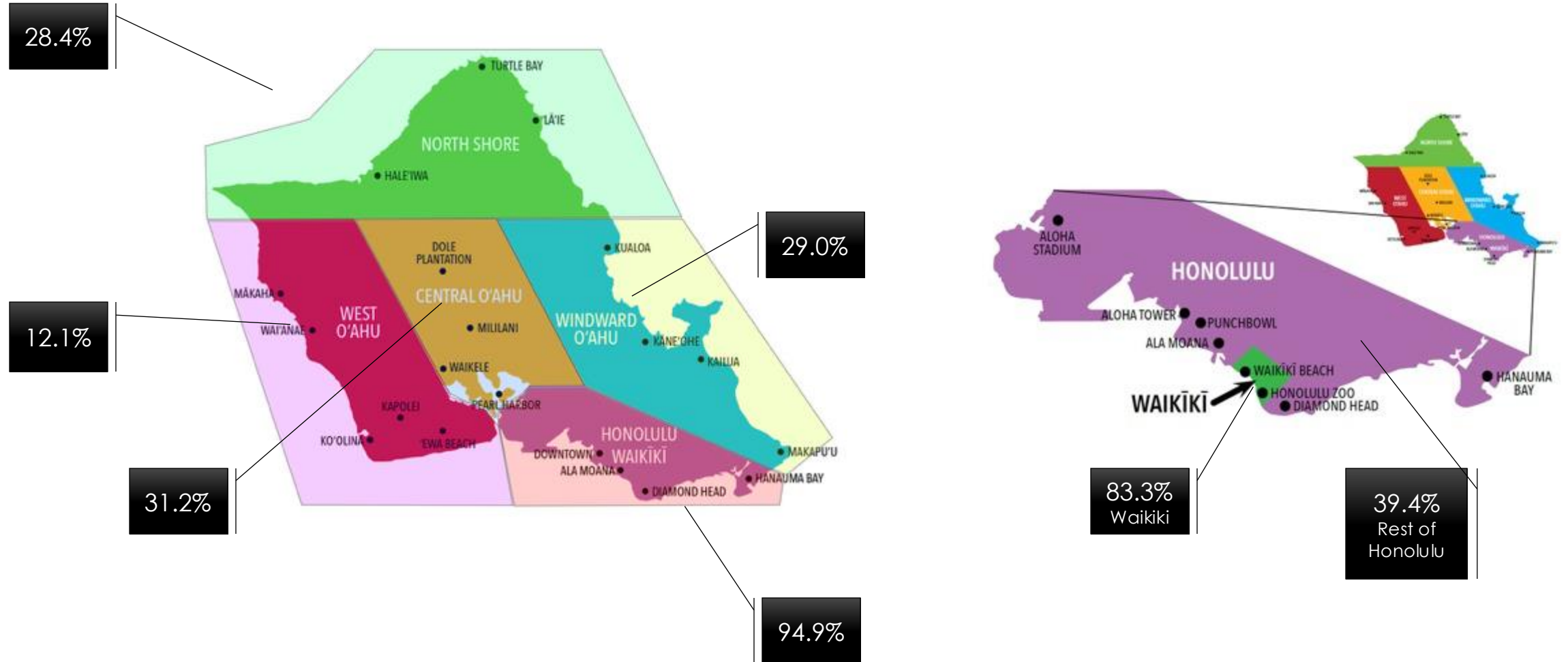
JAPAN



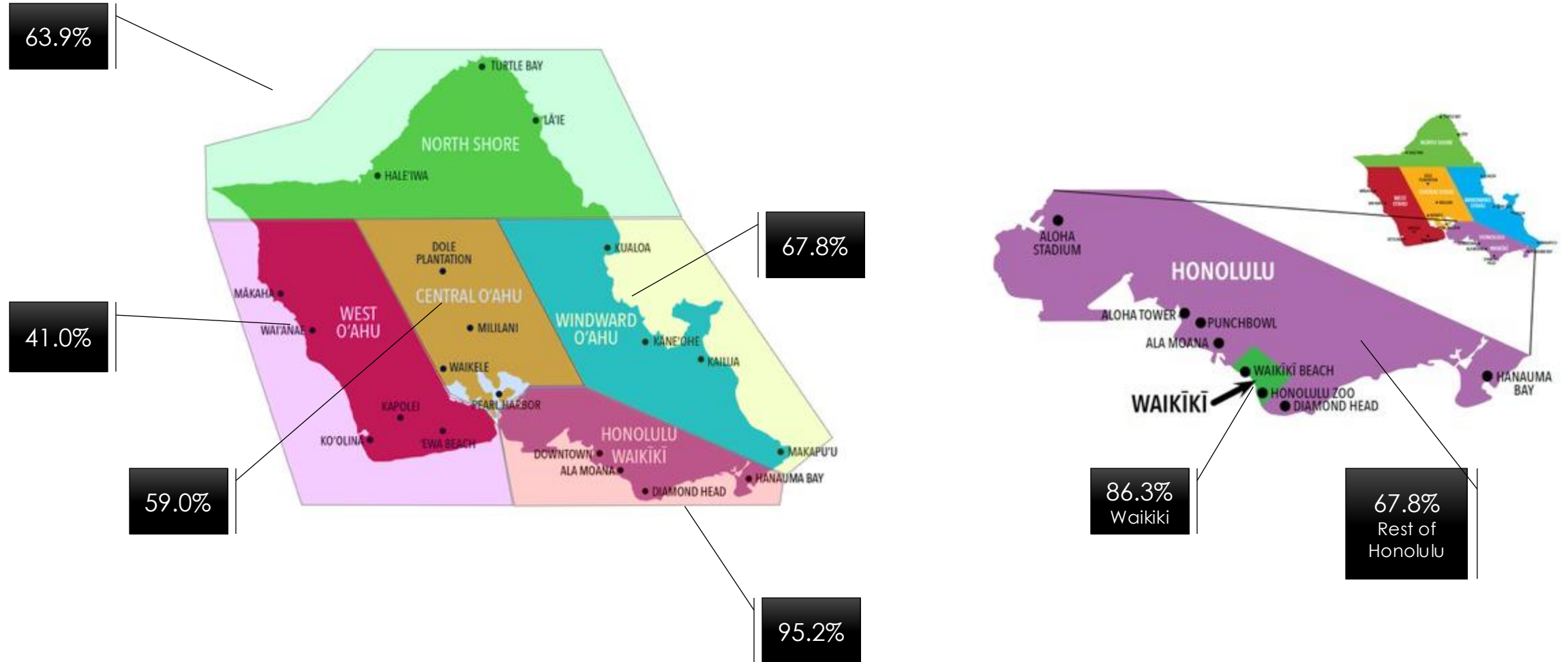
AREAS VISITED - O'AHU CANADA



AREAS VISITED - O'AHU OCEANIA

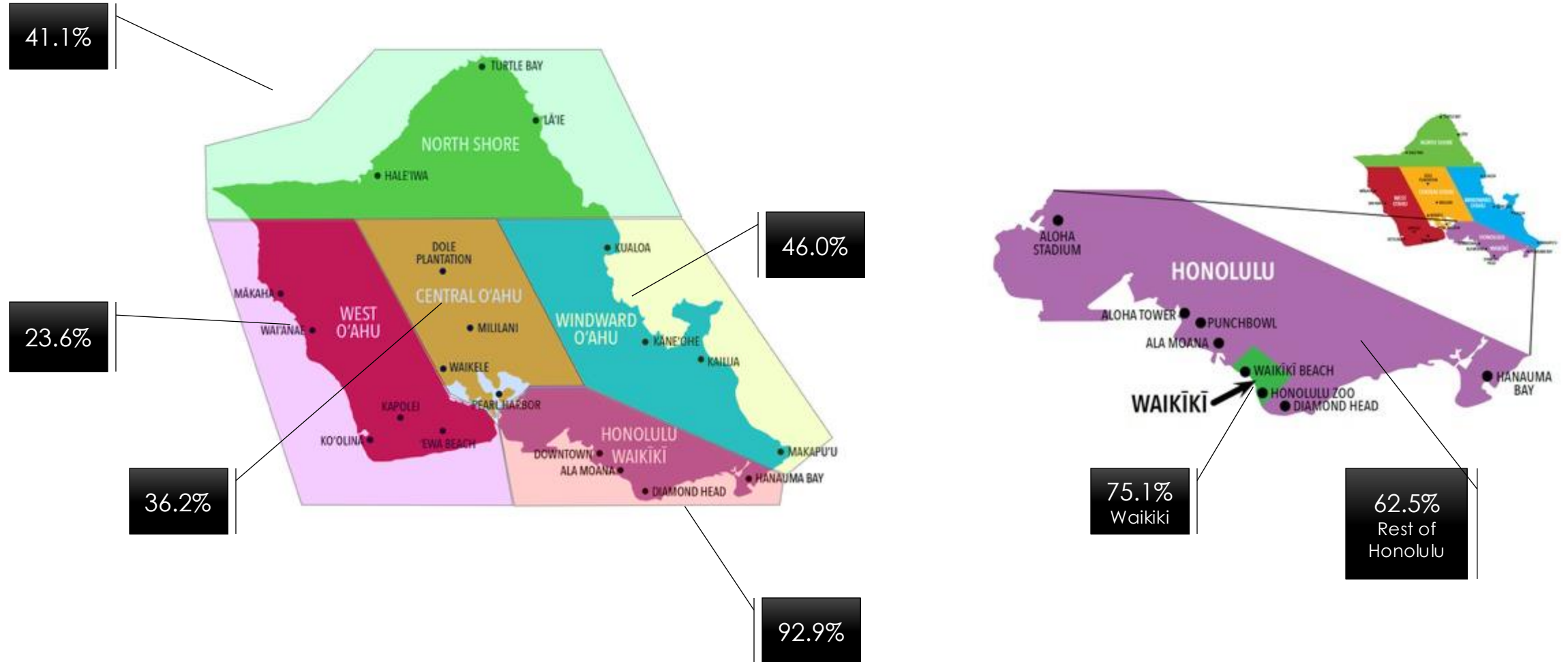


AREAS VISITED - O'AHU CHINA



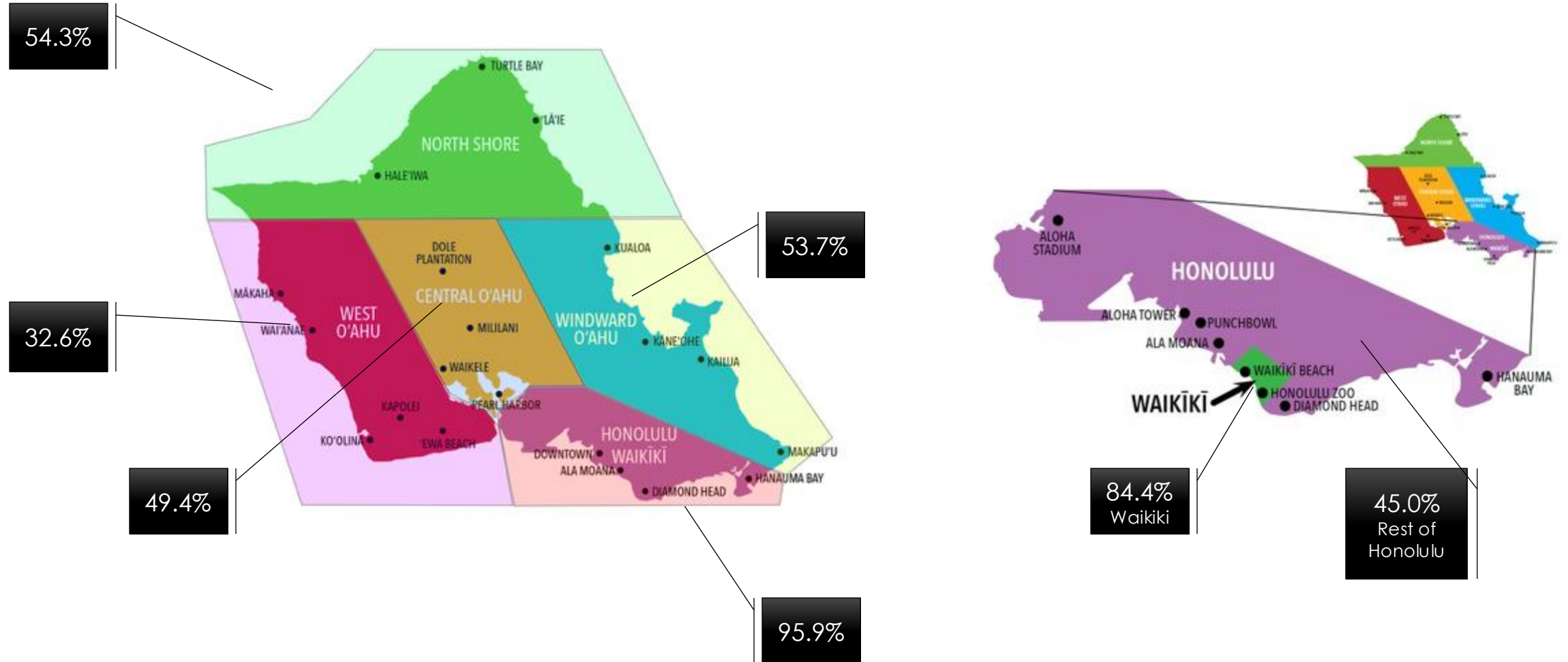
AREAS VISITED - O'AHU

KOREA



AREAS VISITED - O'AHU

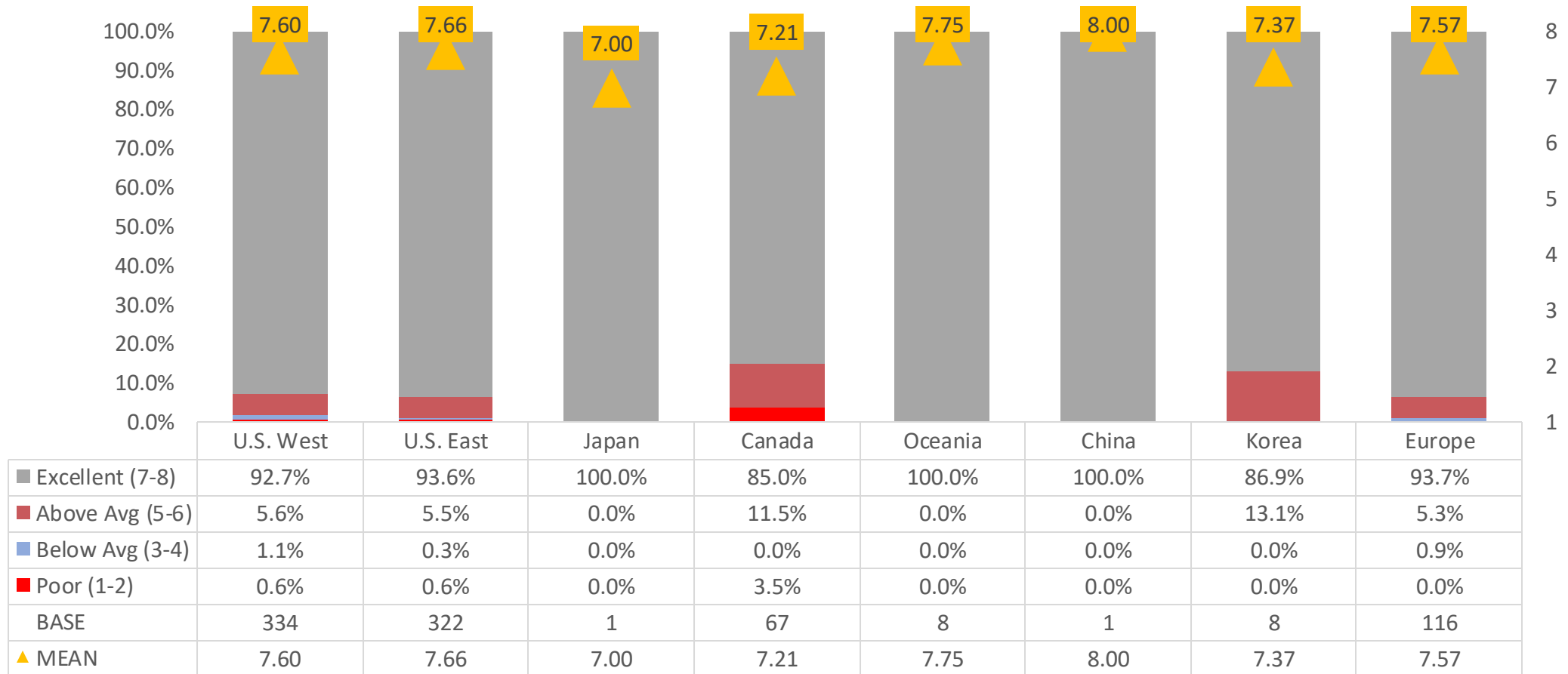
EUROPE



Section 8 – Kaua‘i

SATISFACTION - KAUA'I

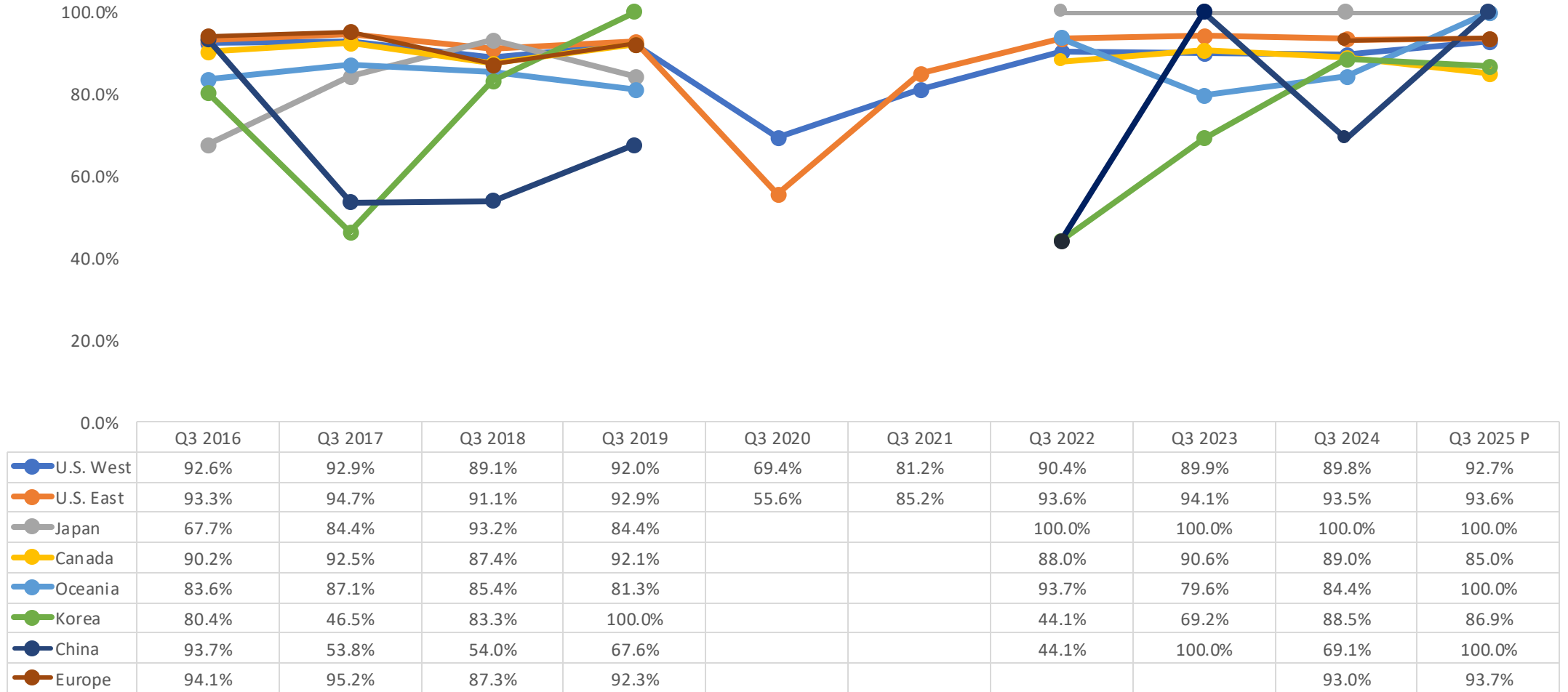
8-pt Rating Scale
8 = Excellent / 1 = Poor



SATISFACTION – KAUAI

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

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



P= Preliminary Data

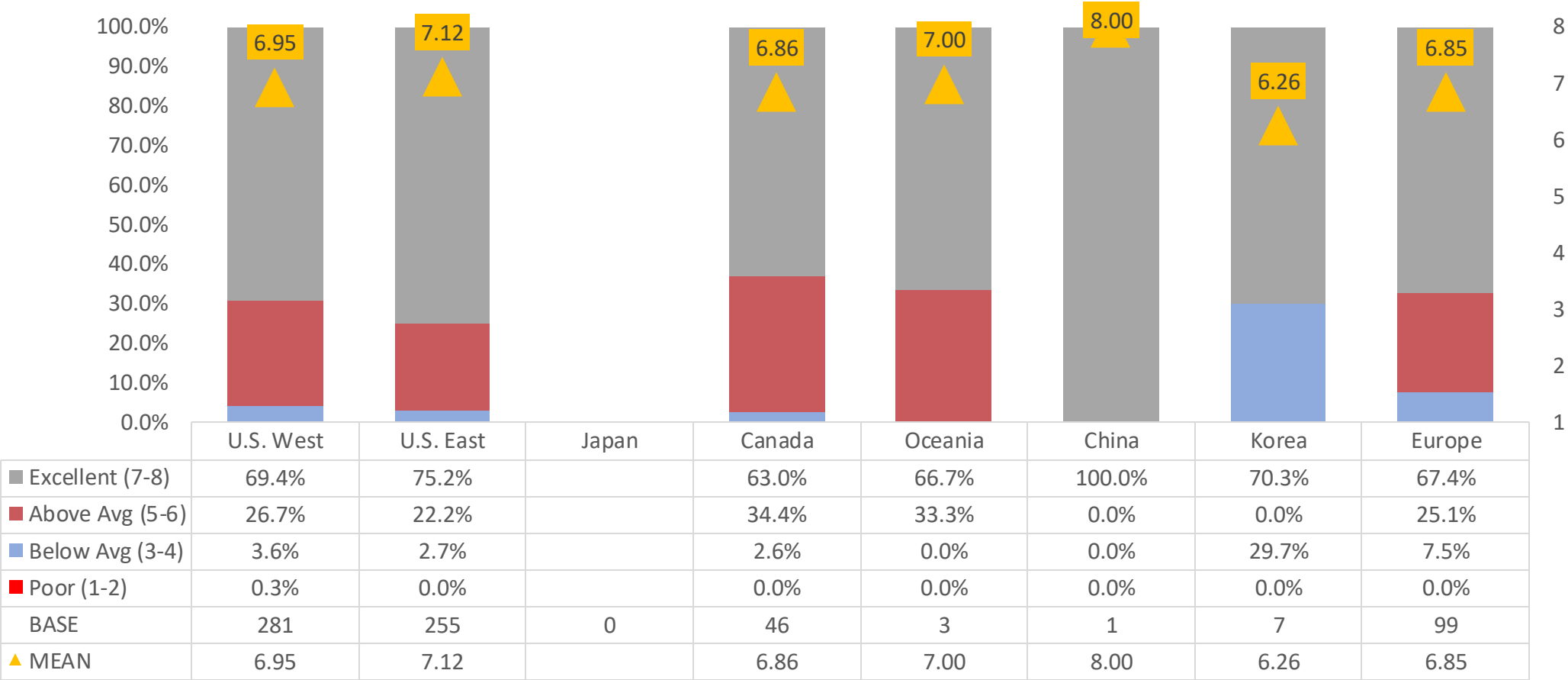
Q. How would you rate your most recent trip to the state of Hawai'i? How would you rate your experience on___?

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.



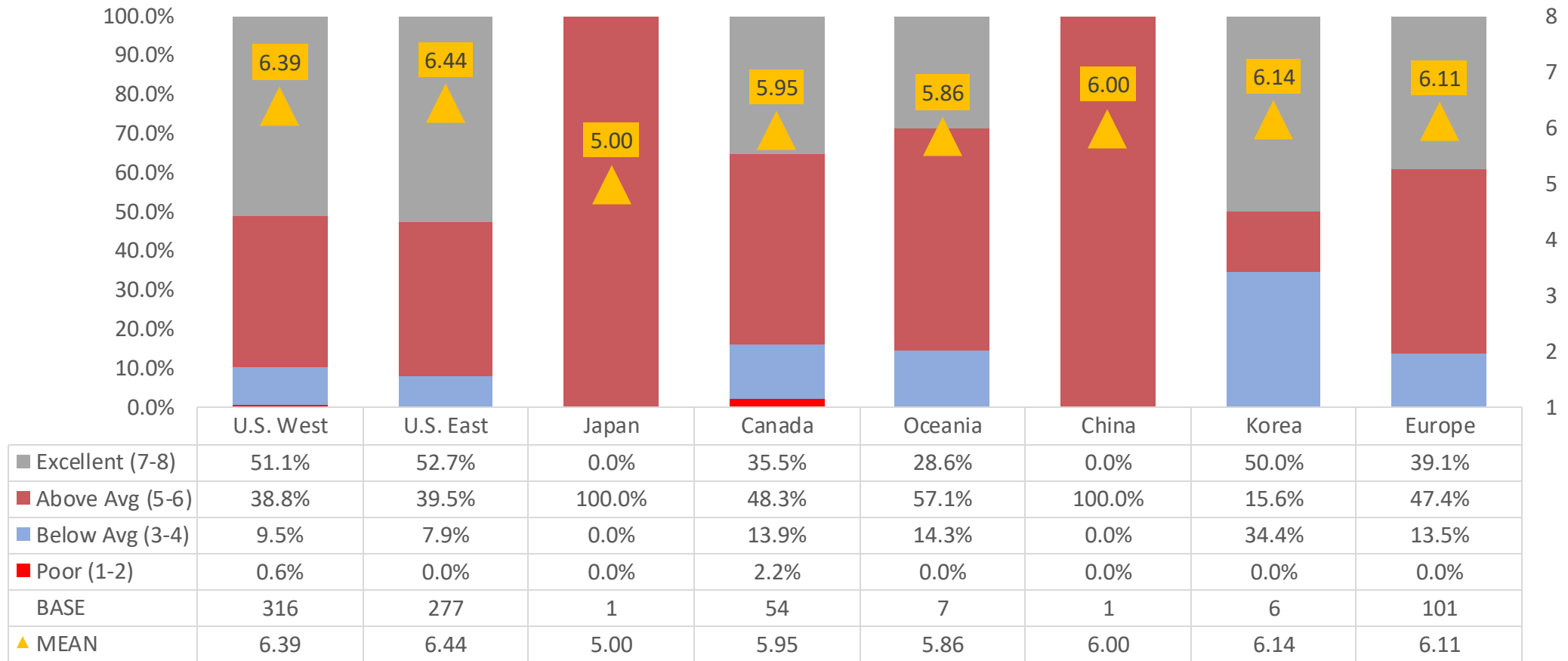
ENTERTAINMENT/ ATTRACTIONS – KAUA‘I

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



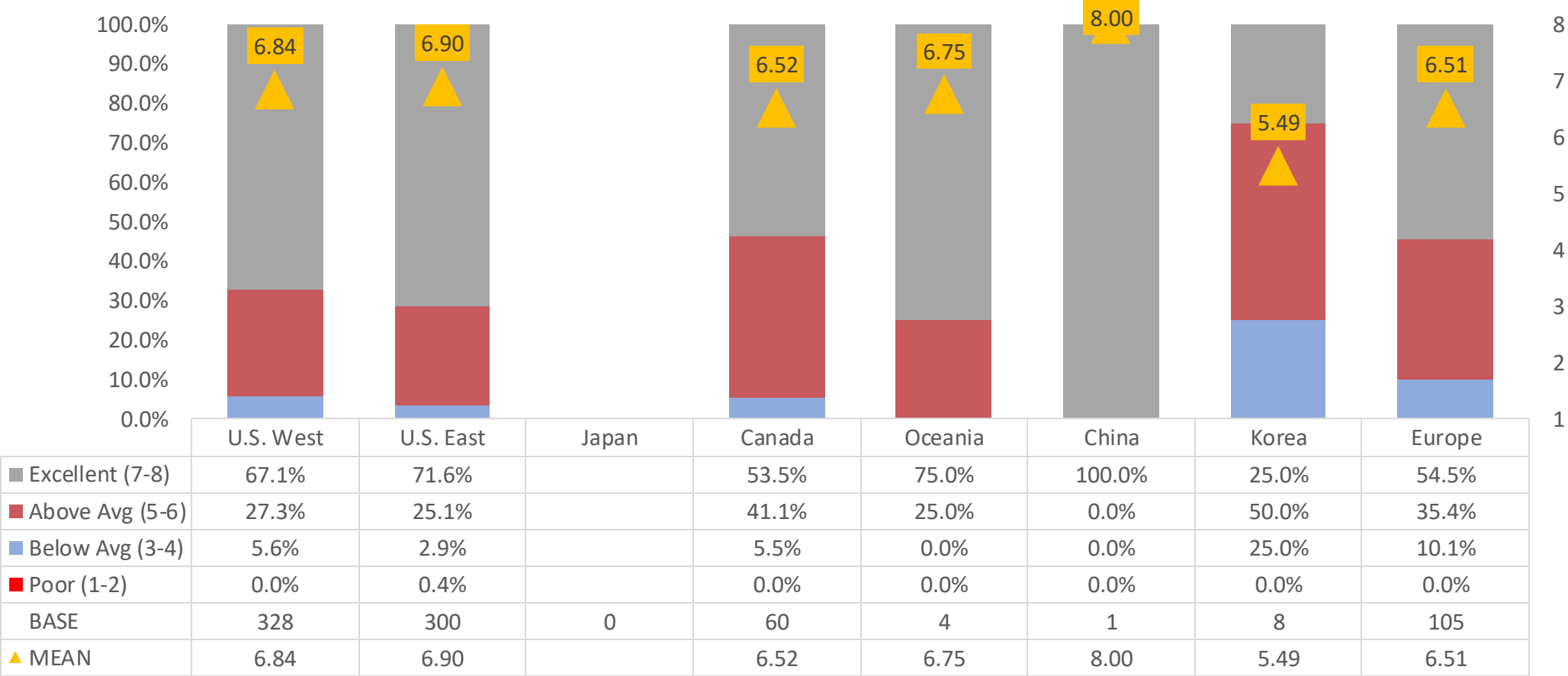
SHOPPING - KAUA'I

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



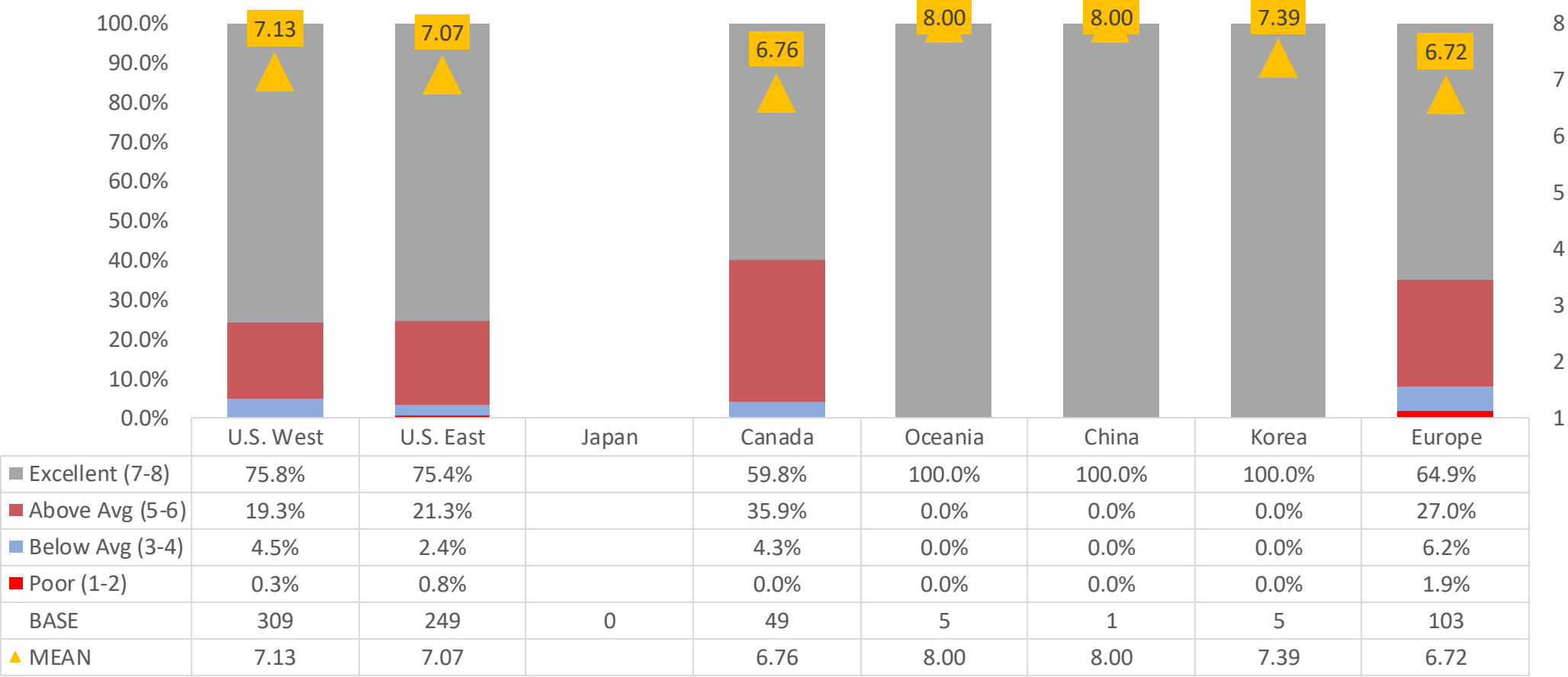
DINING/ FOOD & BEVERAGE – KAUA‘I

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



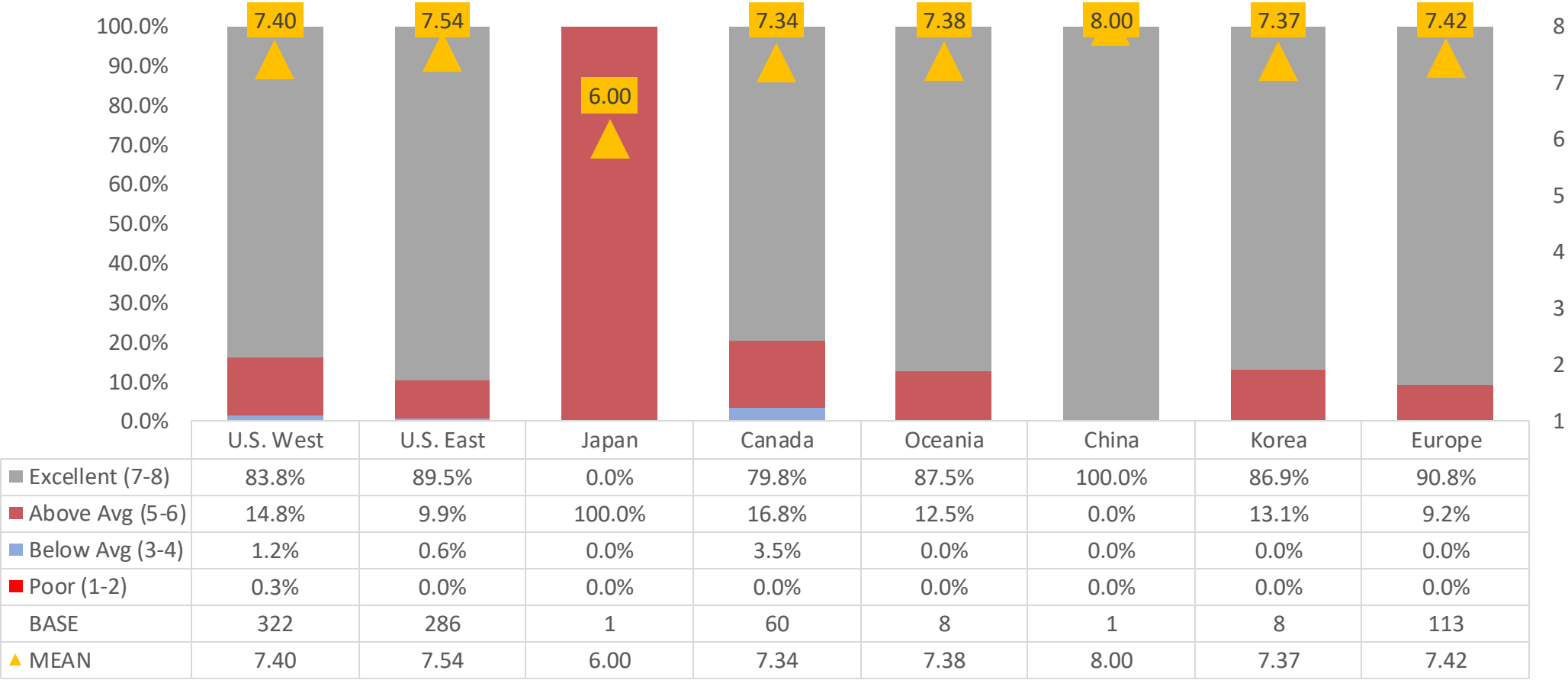
LODGING/ ACCOMMODATIONS – KAUA‘I

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



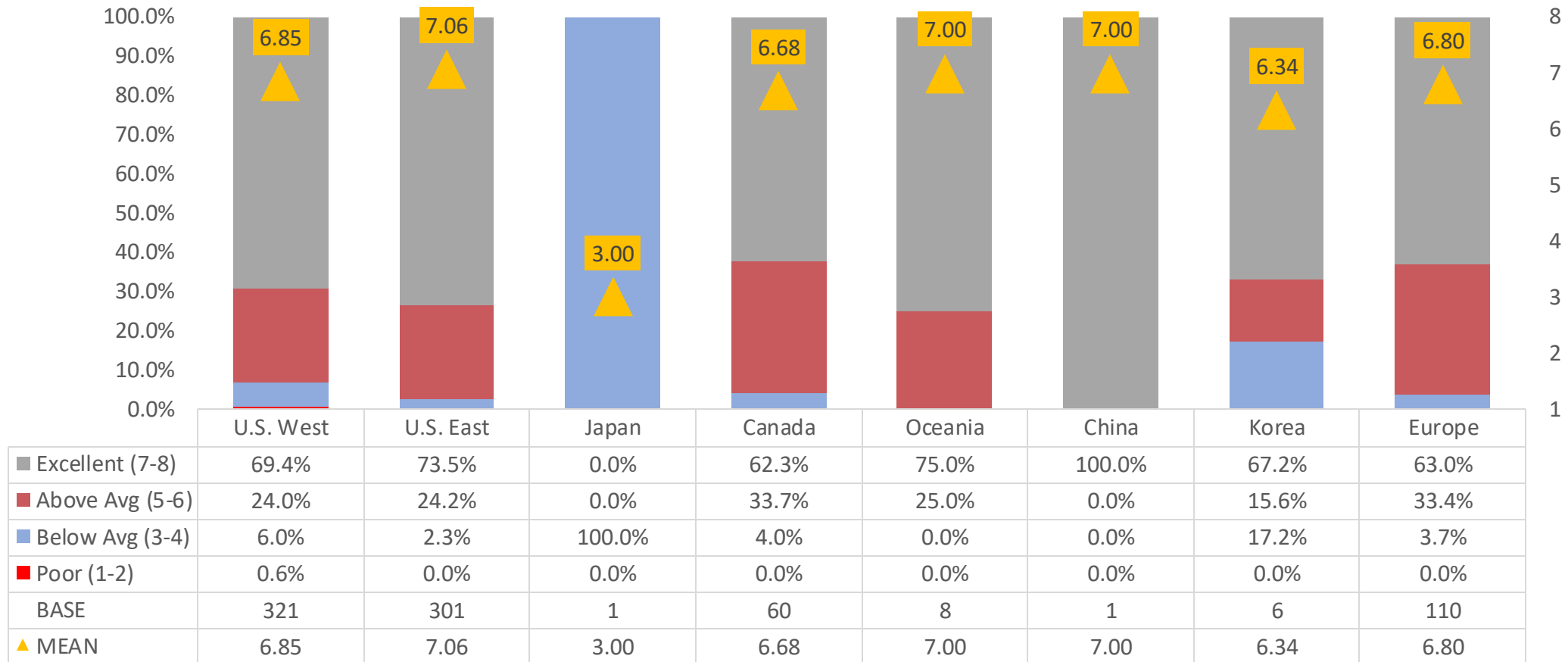
BEACHES - KAUA'I

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



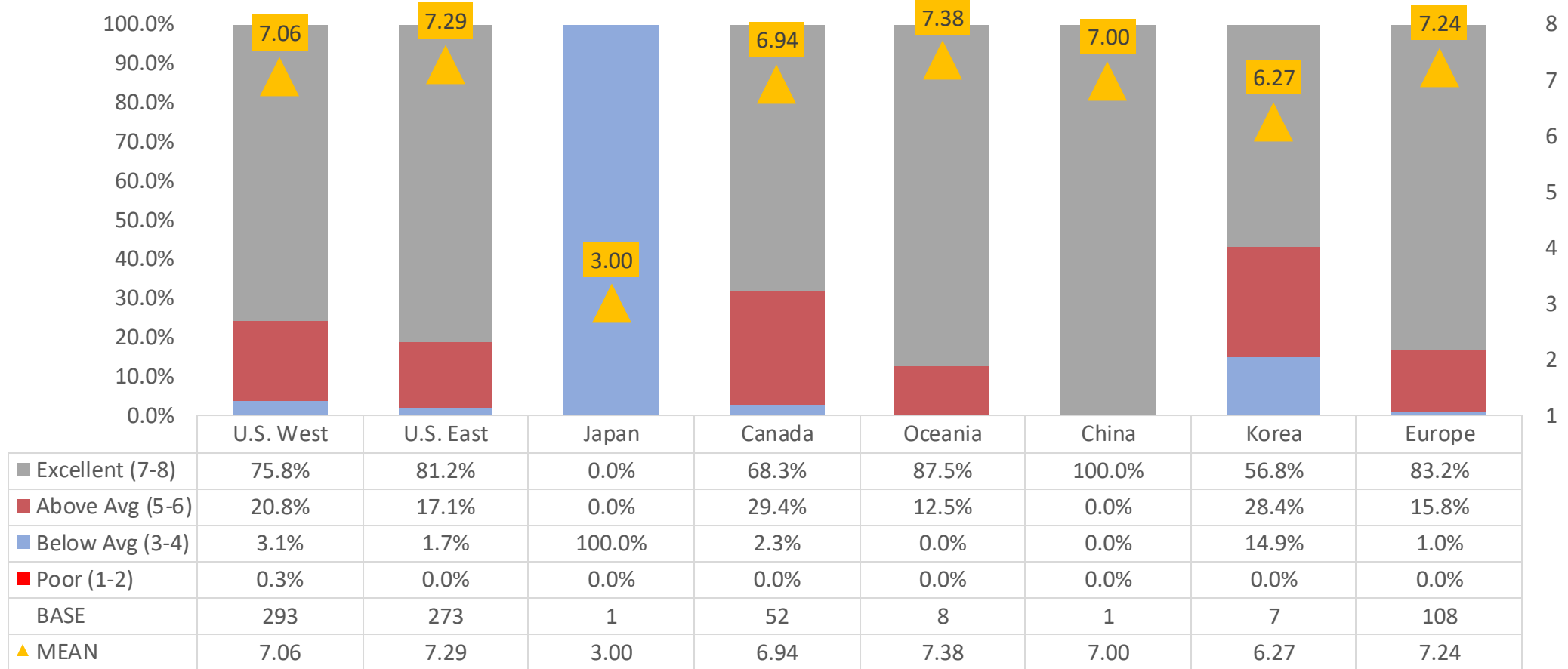
PUBLIC AREAS - KAUA'I

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



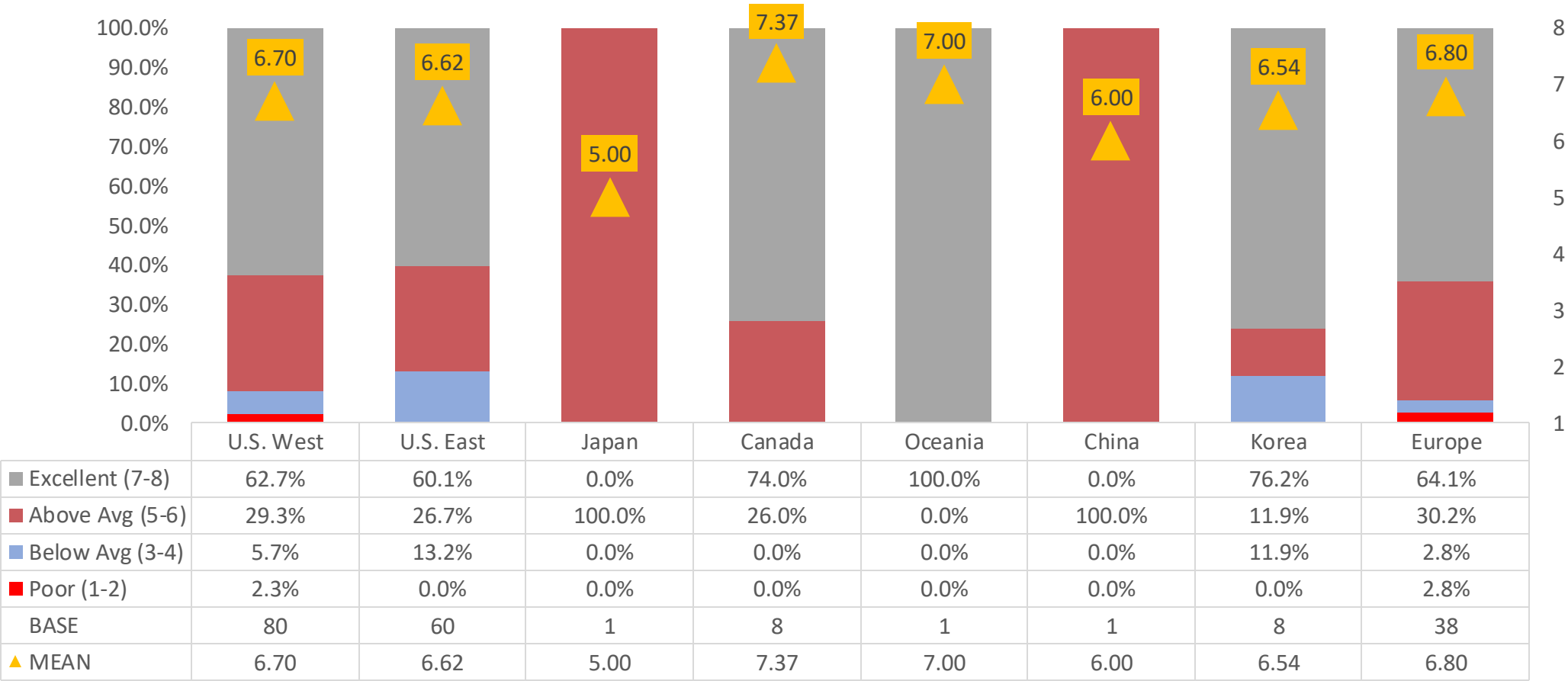
PARKS - KAUAI

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



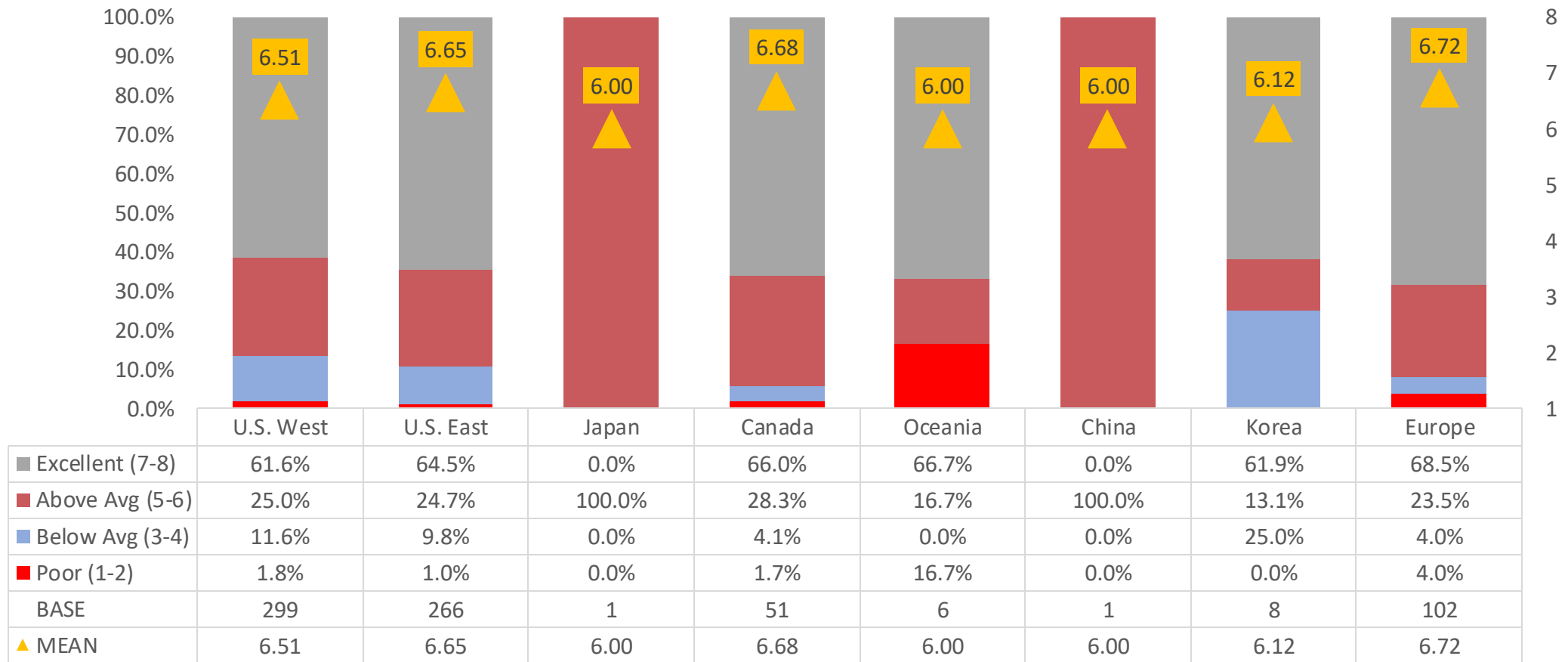
ROADS – KAUA‘I

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



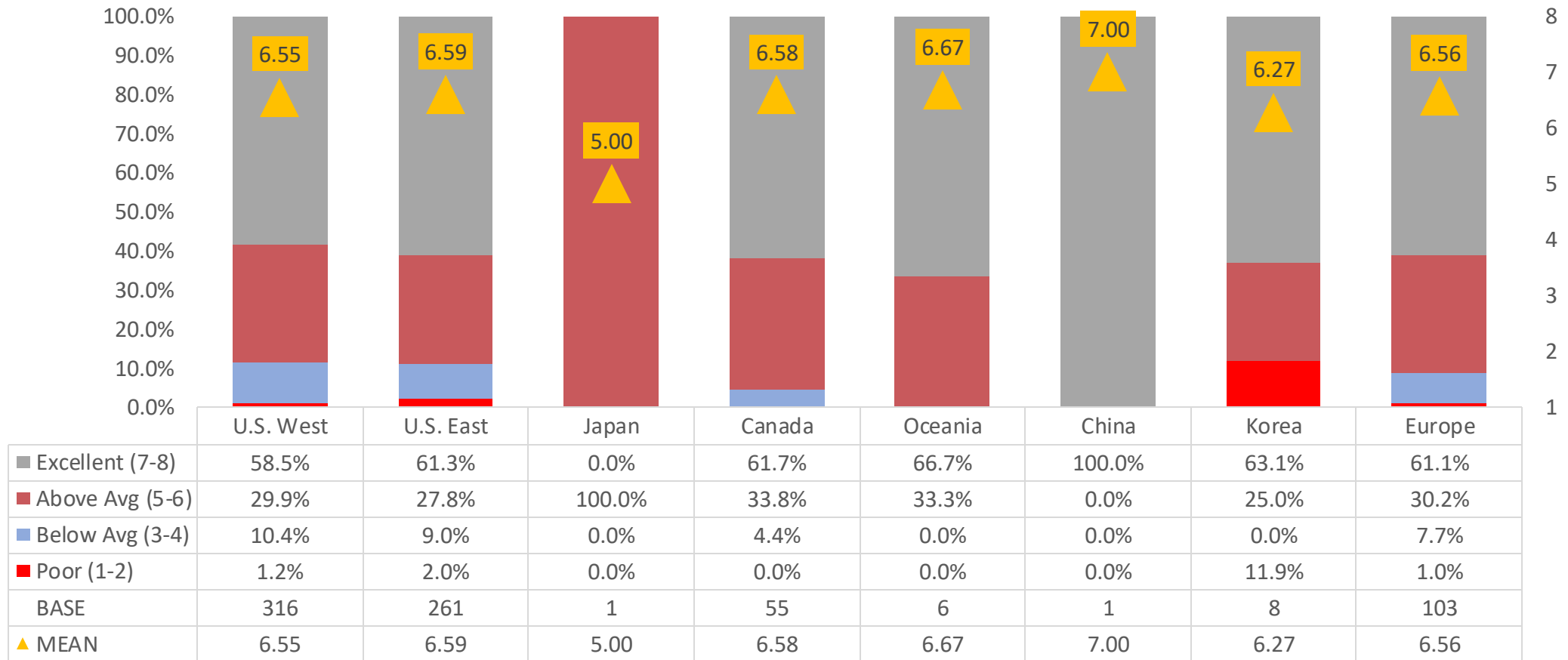
TRANSPORTATION ON ISLAND - KAUA'I

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



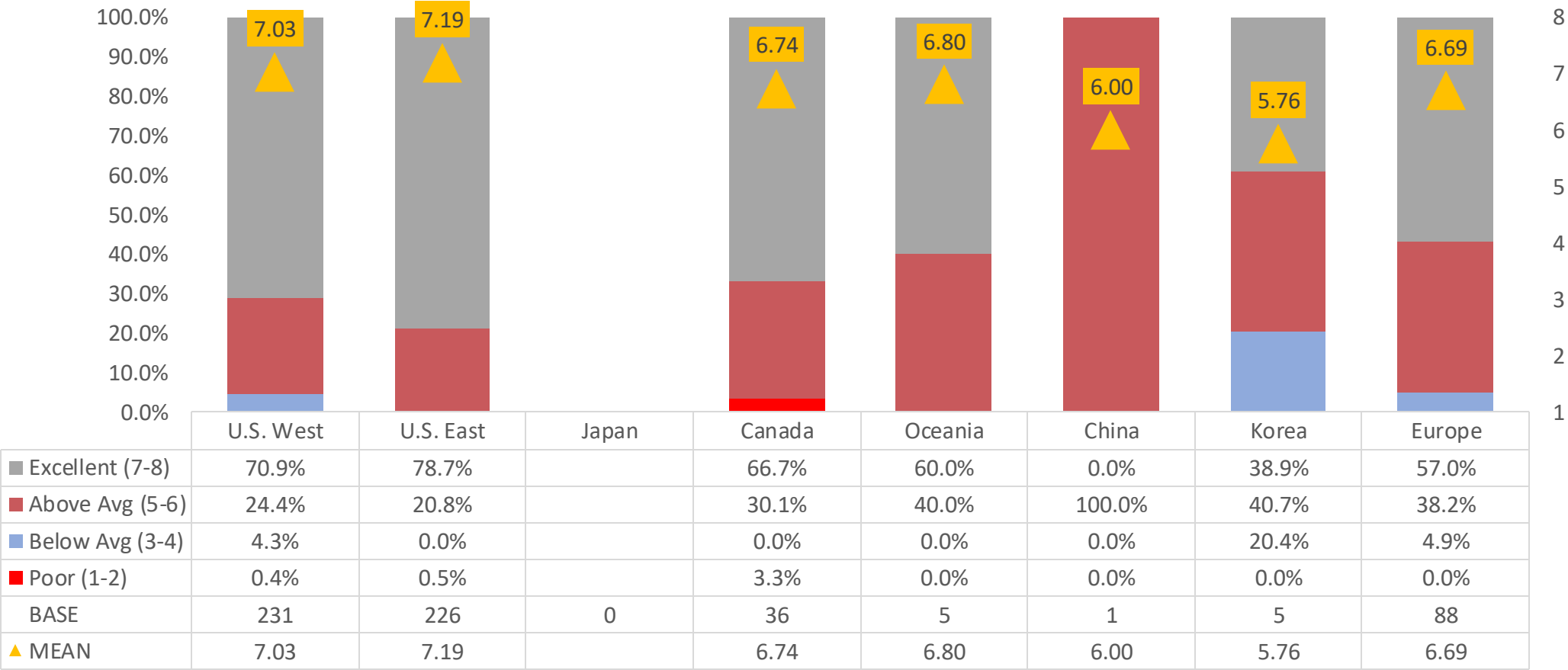
AIRPORT - KAUA'I

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



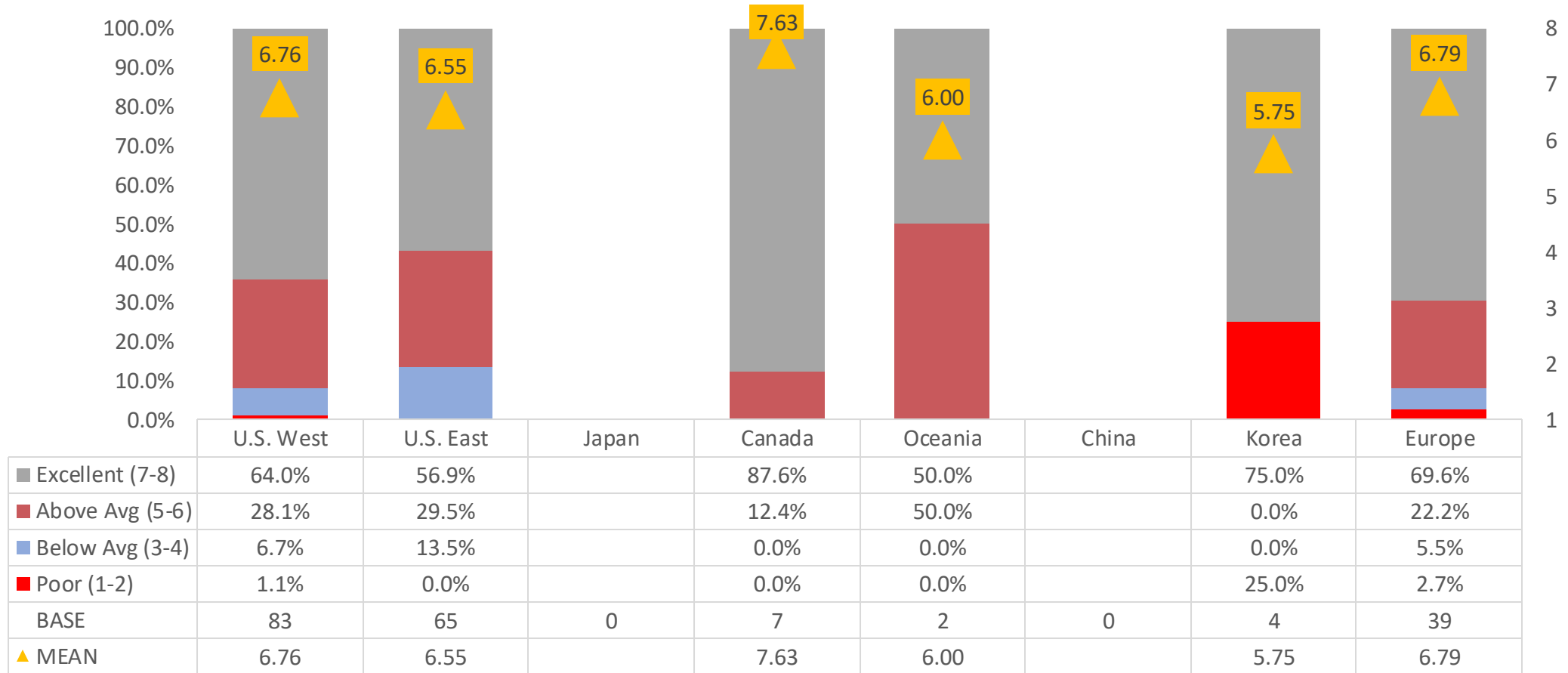
CULTURAL ACTIVITIES - KAUUA'I

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



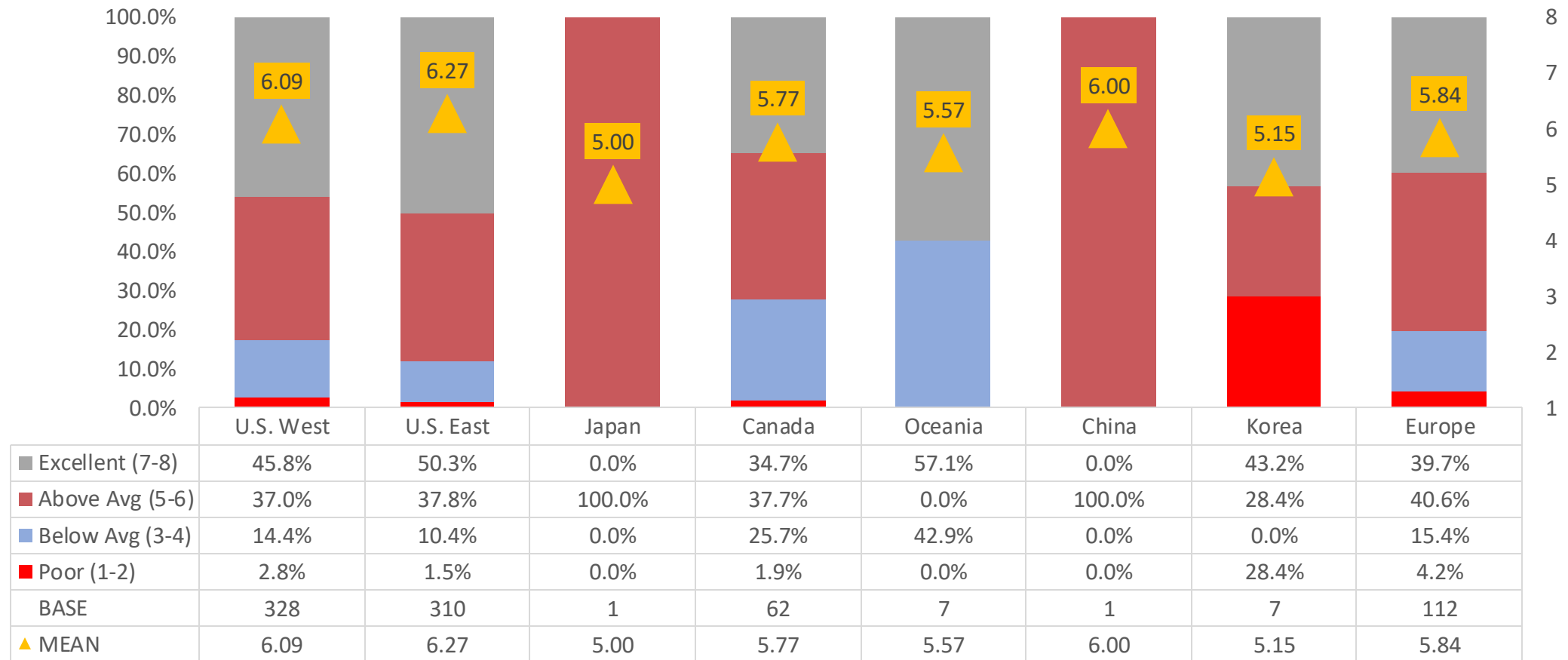
VOLUNTEER ACTIVITIES - KAUAI

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



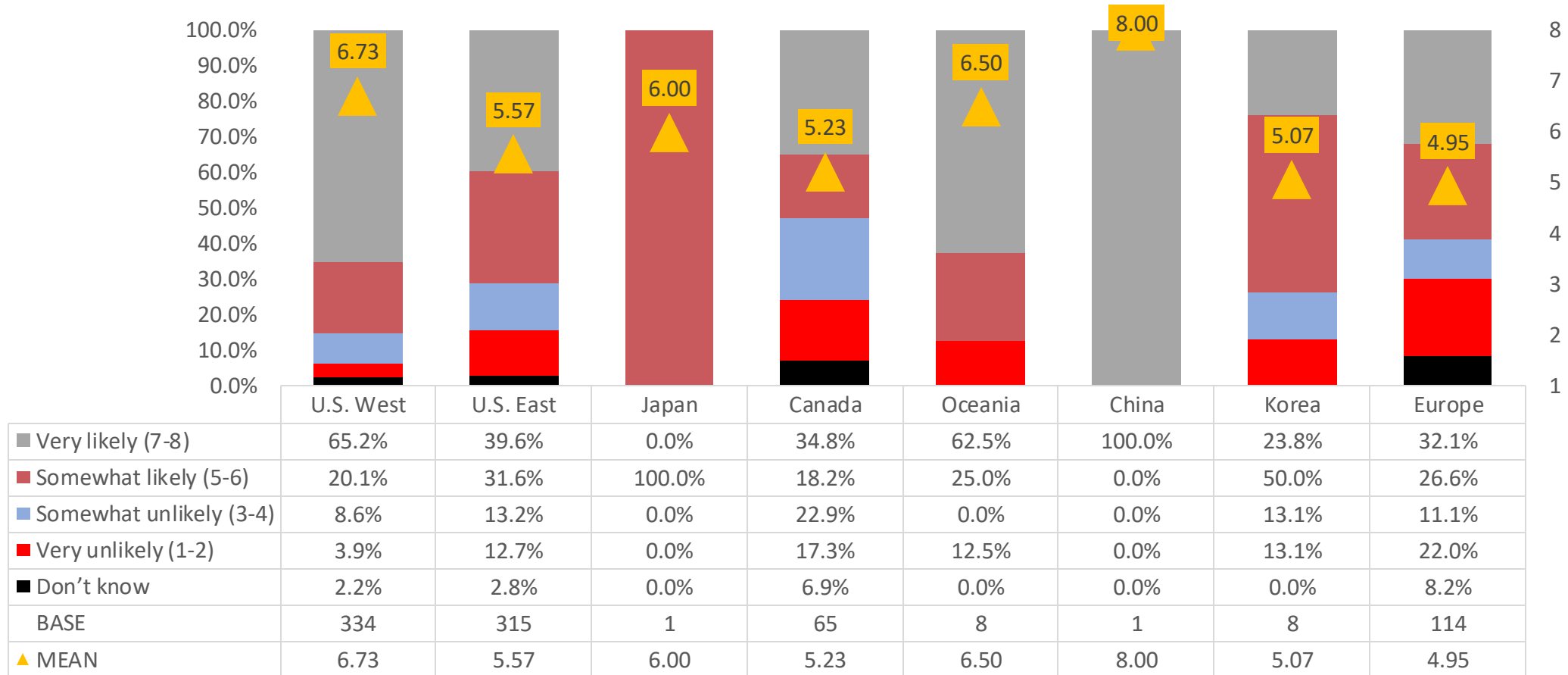
VALUE FOR THE MONEY – KAUA‘I

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



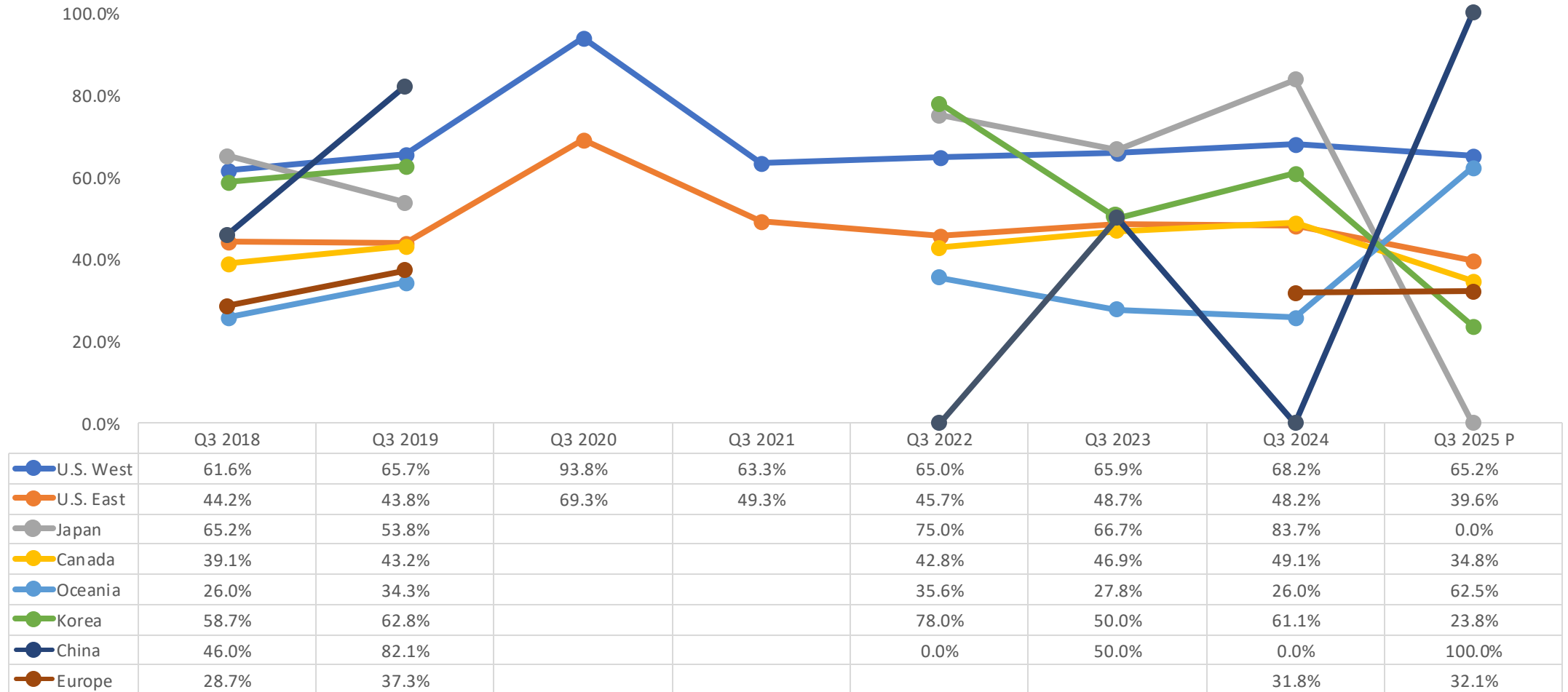
LIKELIHOOD OF RETURN VISIT – KAUA‘I

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



LIKELIHOOD OF RETURN VISIT - KAUUA'I

TOP BOX - VERY LIKELY (7-8)



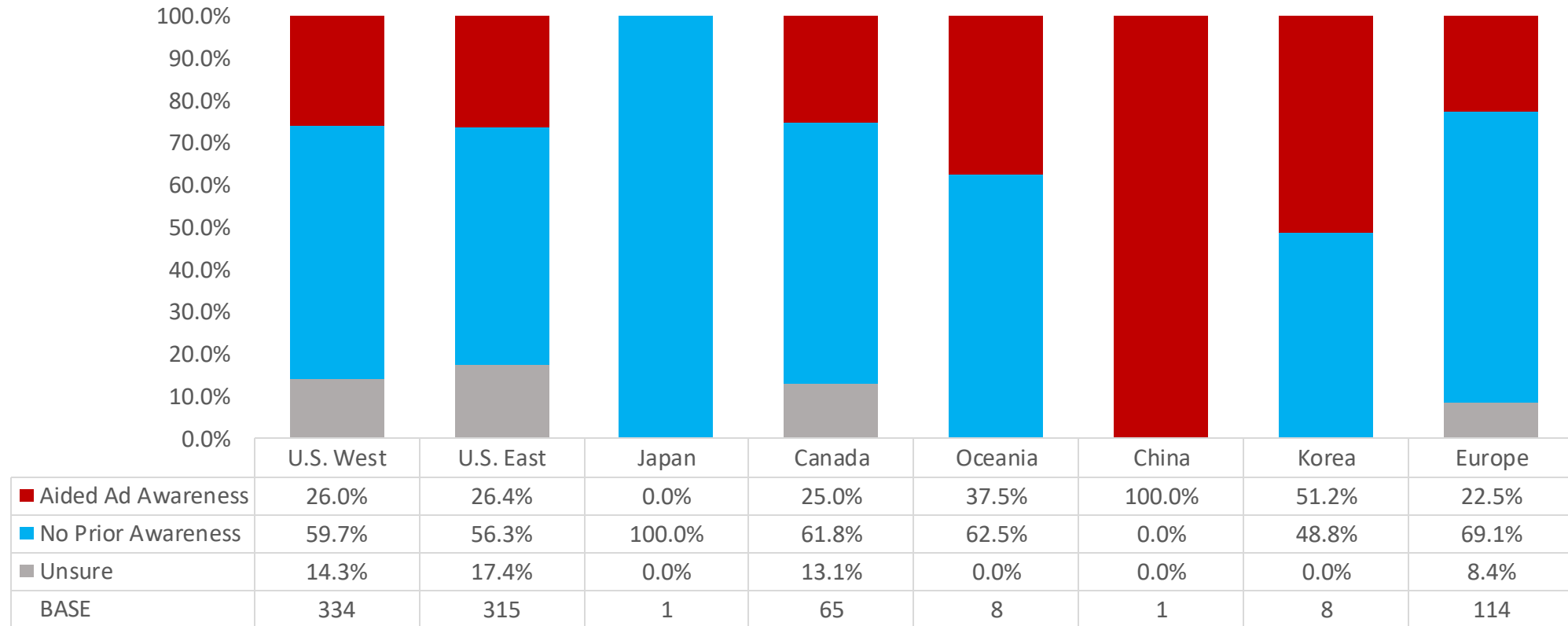
P= Preliminary Data

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.



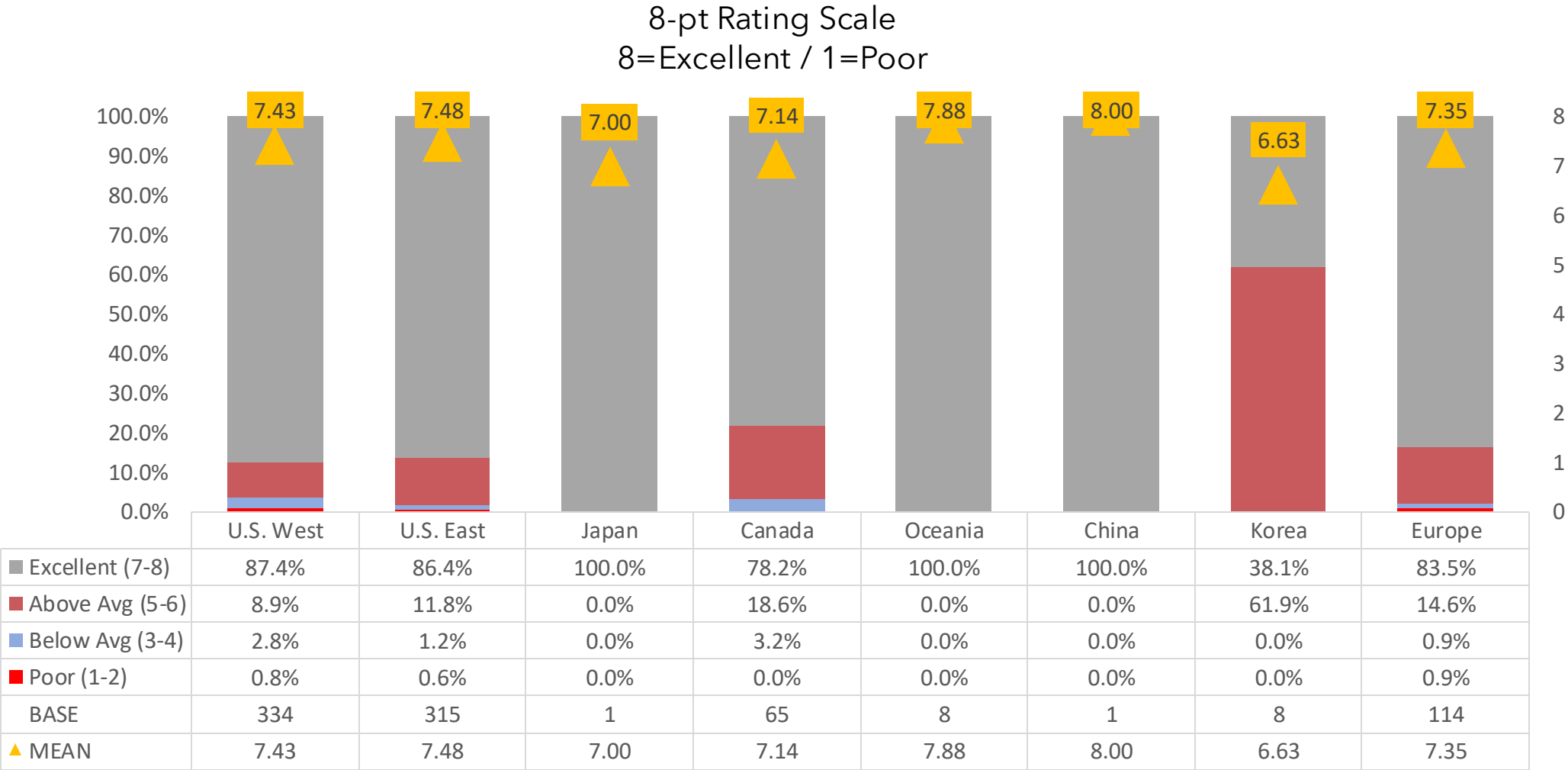
AIDED ADVERTISING AWARENESS – KAUA‘I



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

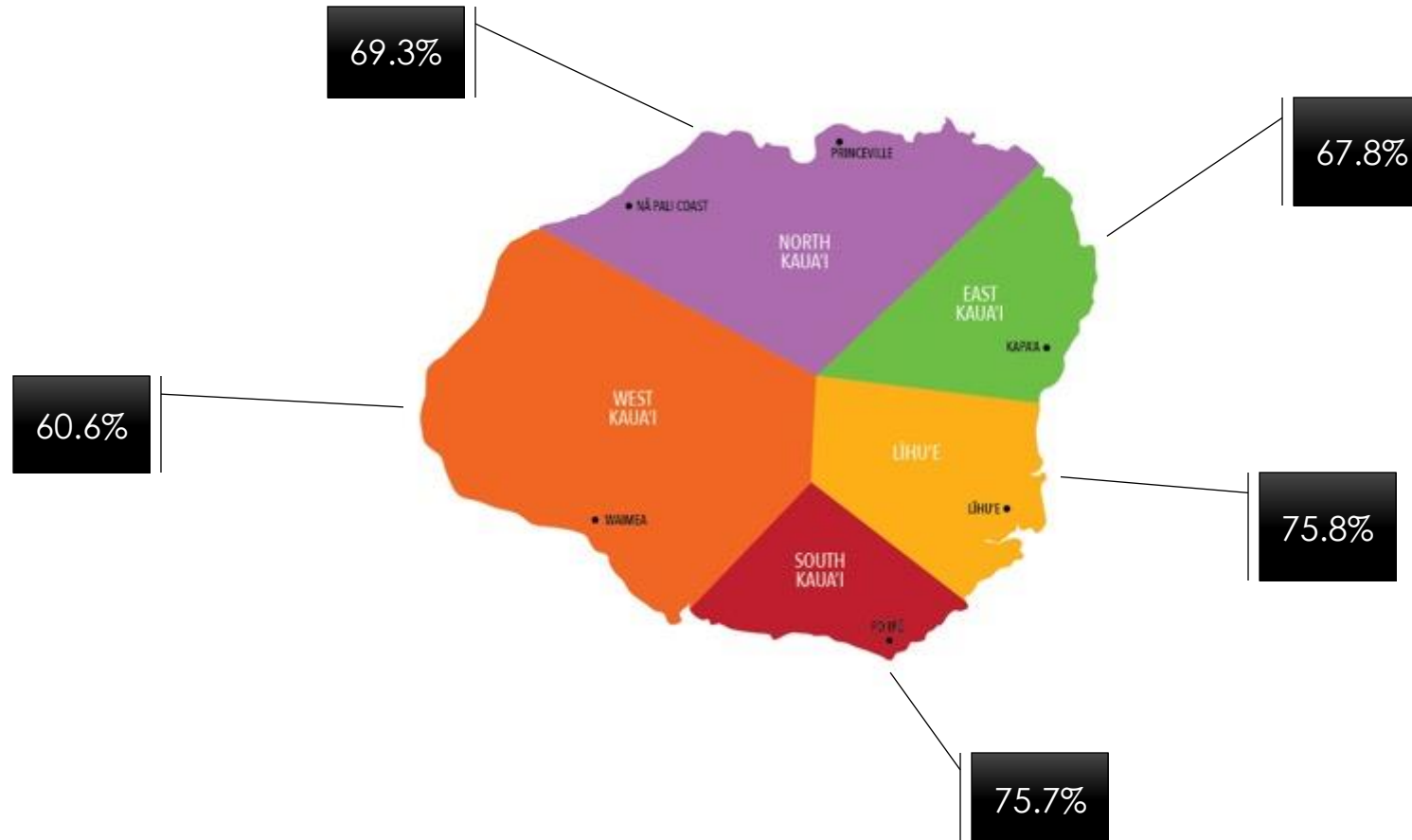
FRIENDLINESS OF KAUA‘I RESIDENTS



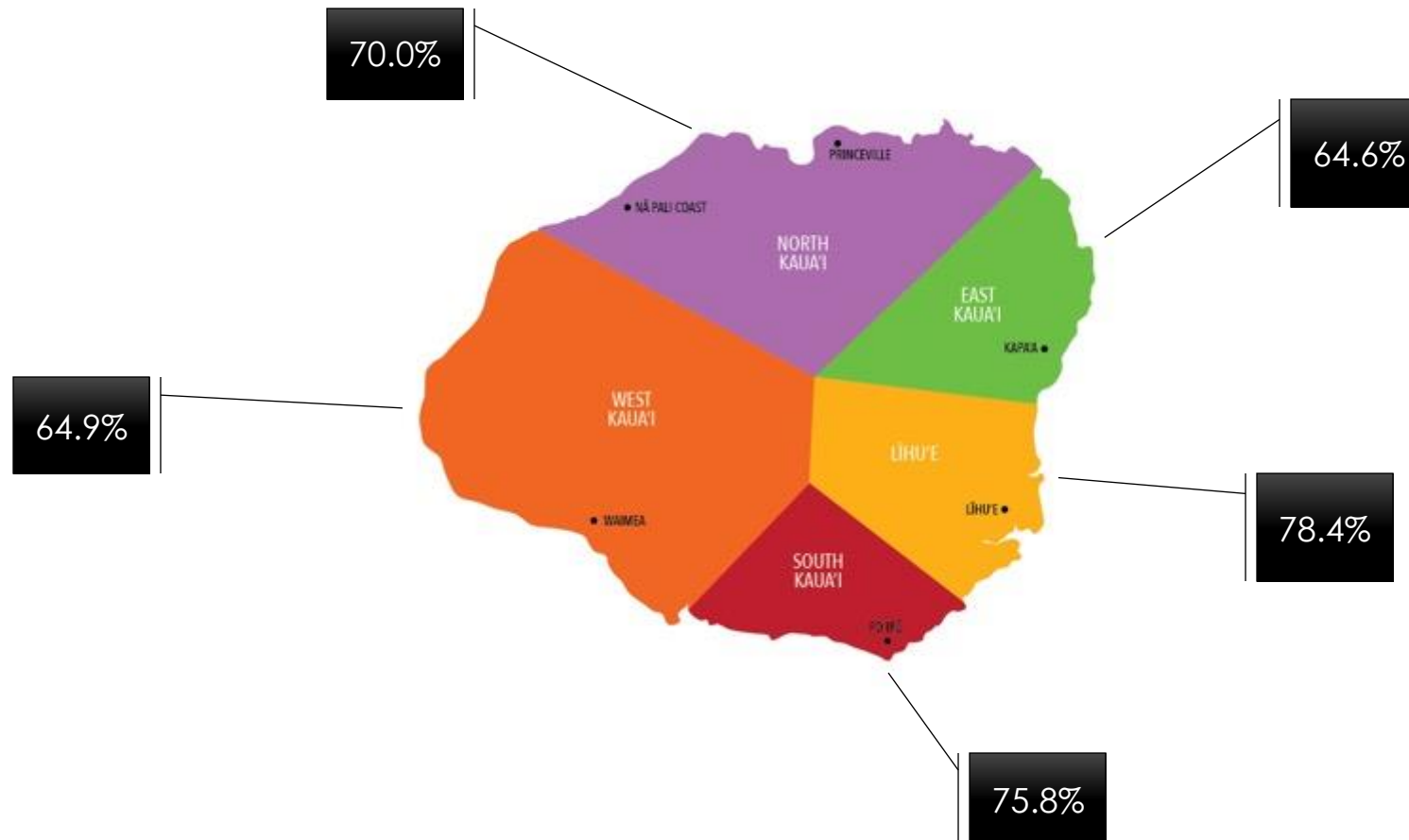
TOP TRIP INFLUENCERS – KAUA‘I

	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

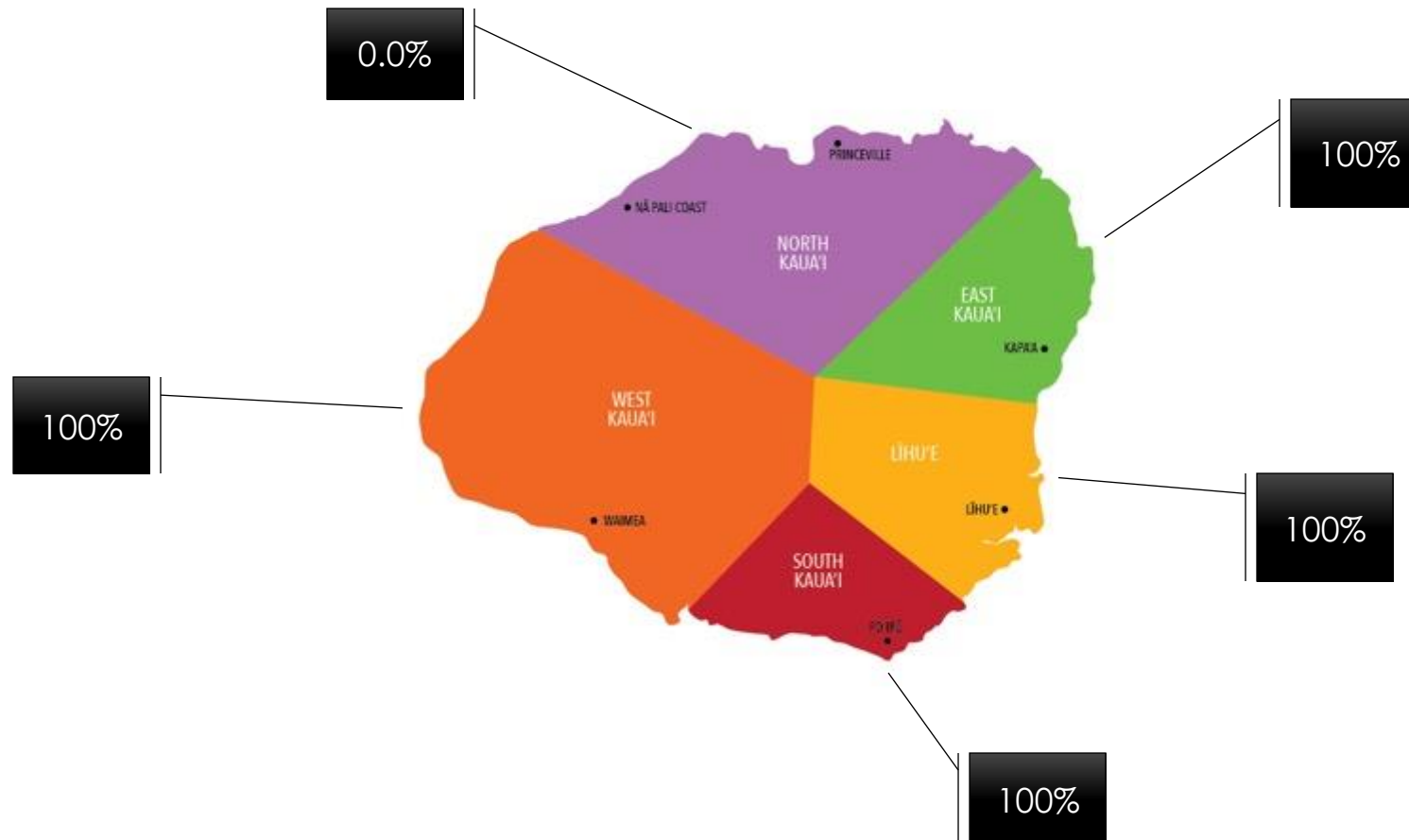
AREAS VISITED - KAUA'I U.S. WEST



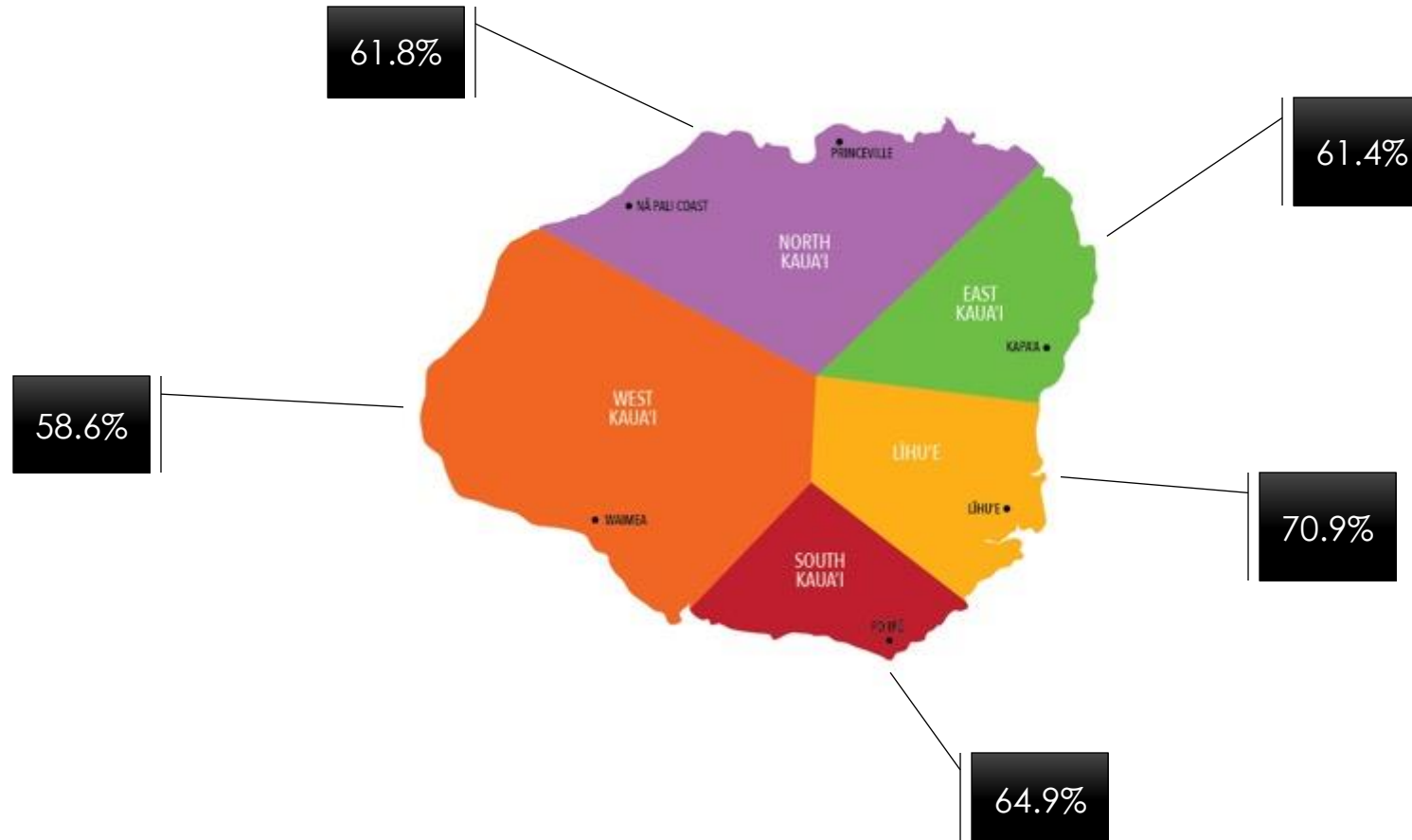
AREAS VISITED - KAUA'I U.S. EAST



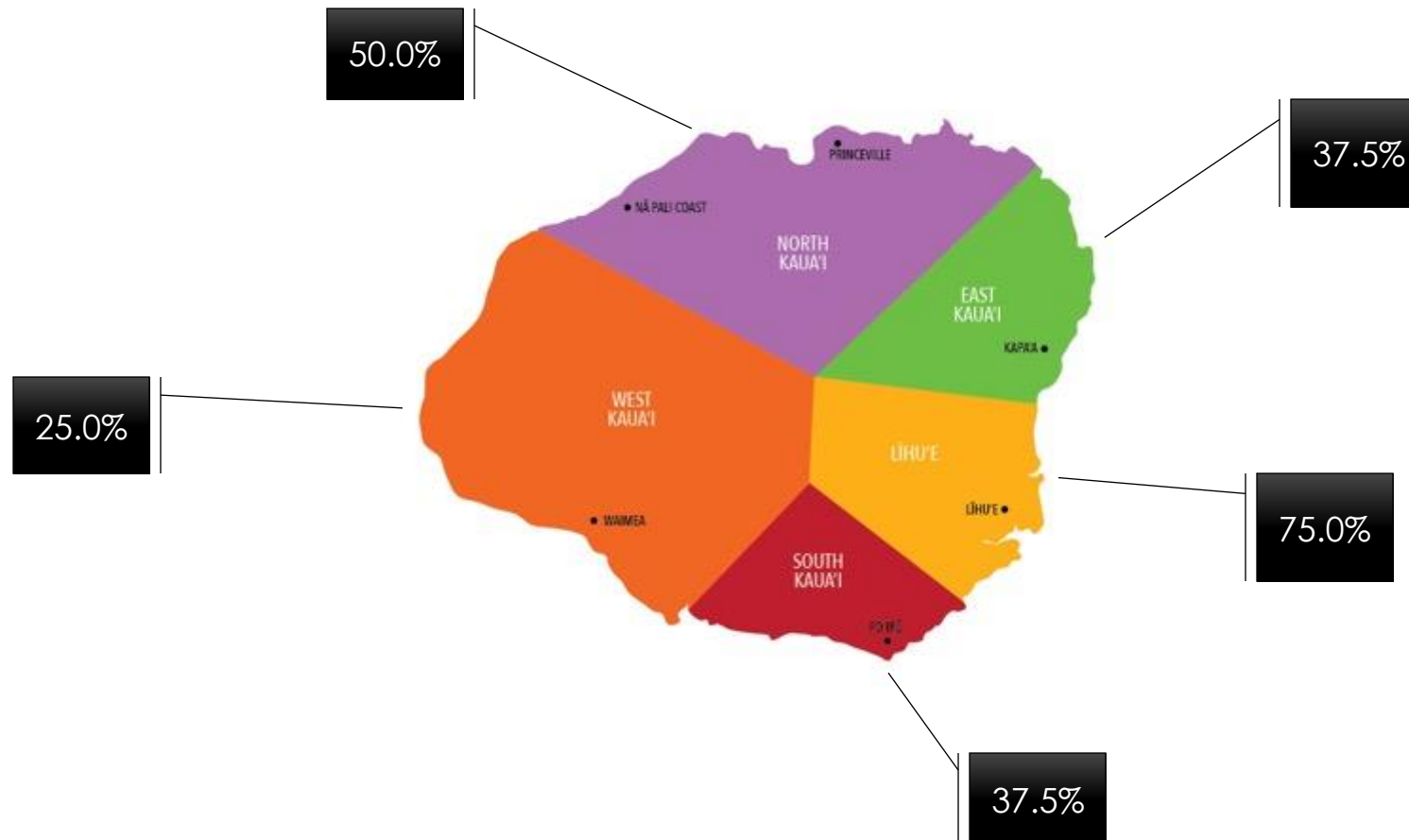
AREAS VISITED - KAUA'I JAPAN



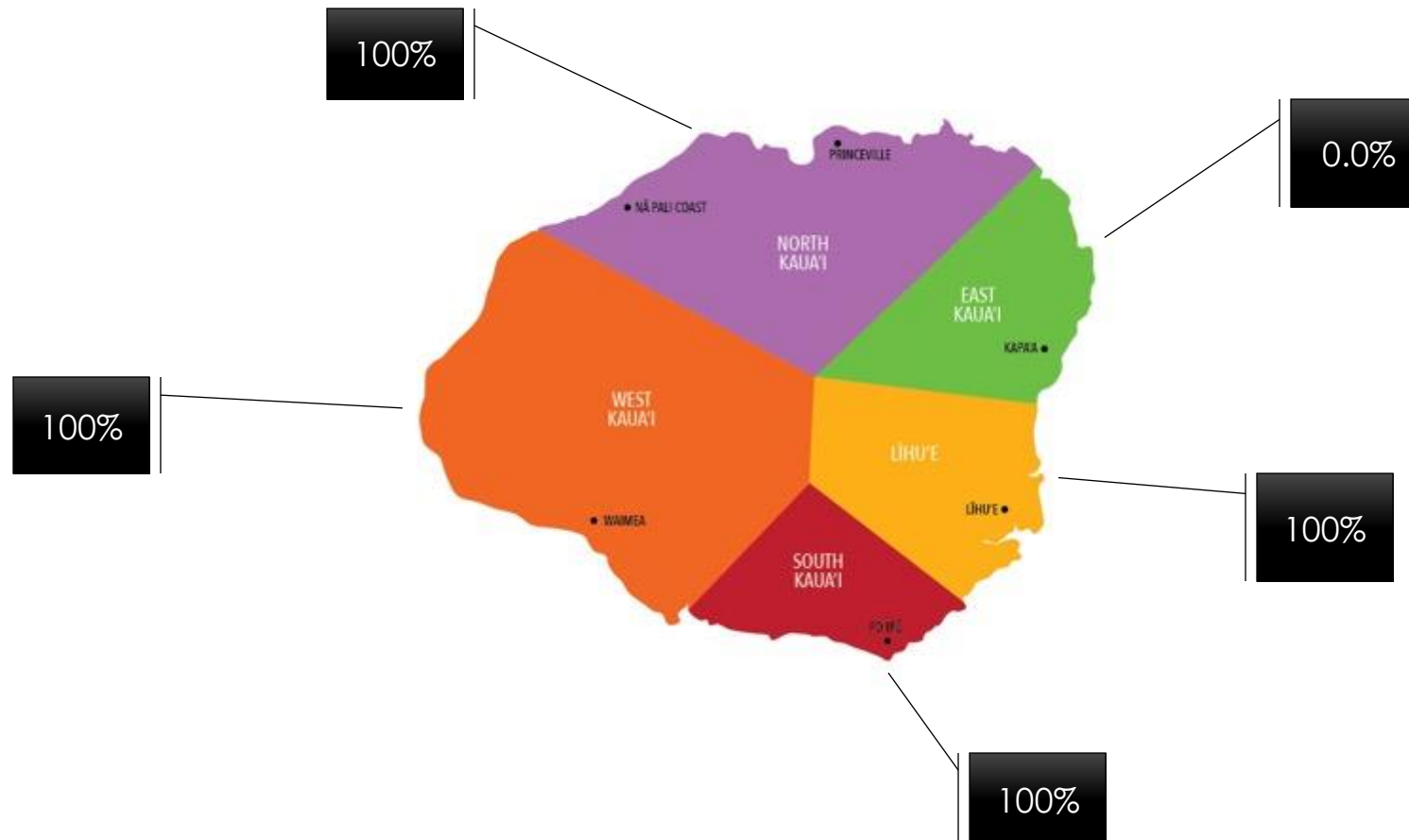
AREAS VISITED - KAUA'I CANADA



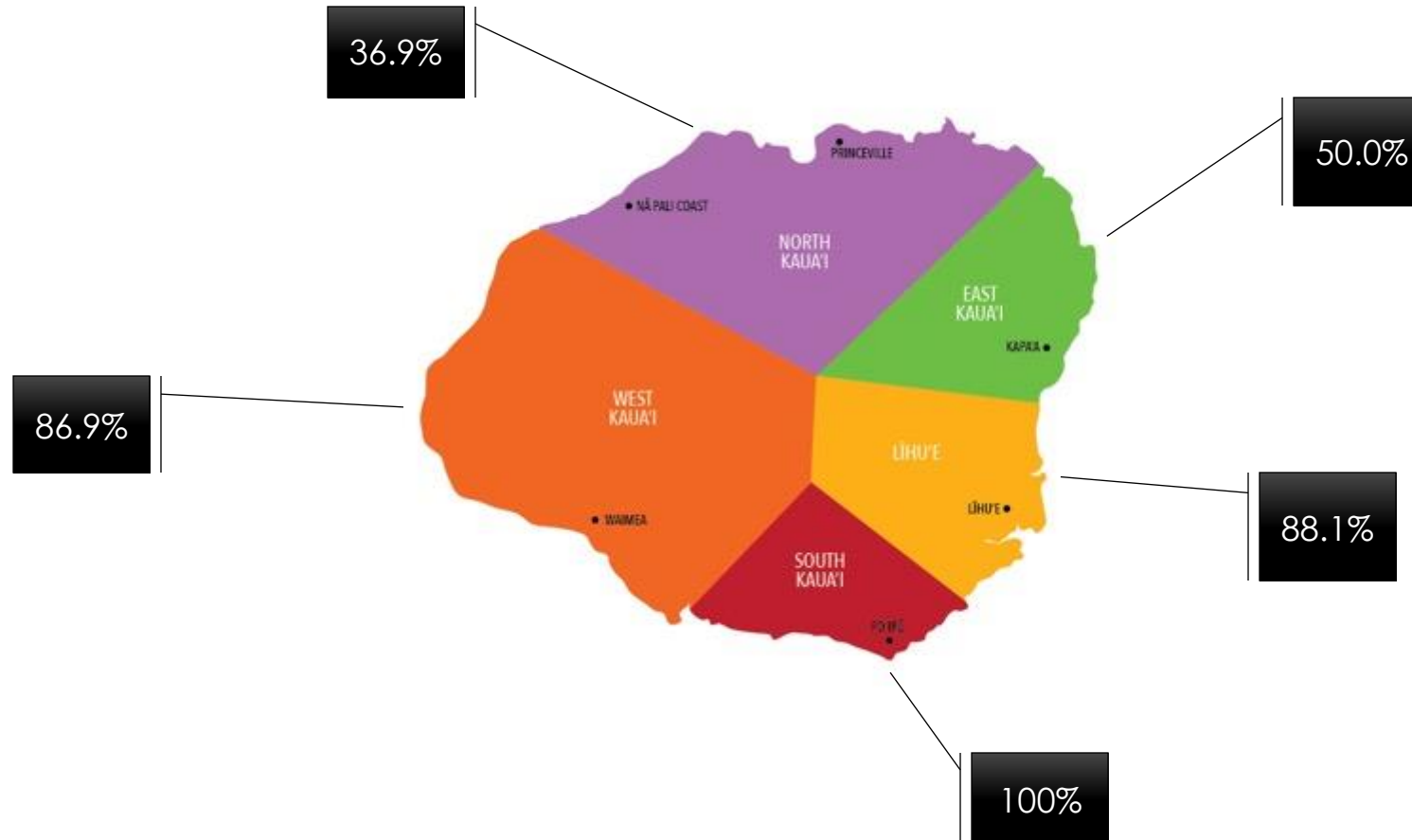
AREAS VISITED - KAUA'I OCEANIA



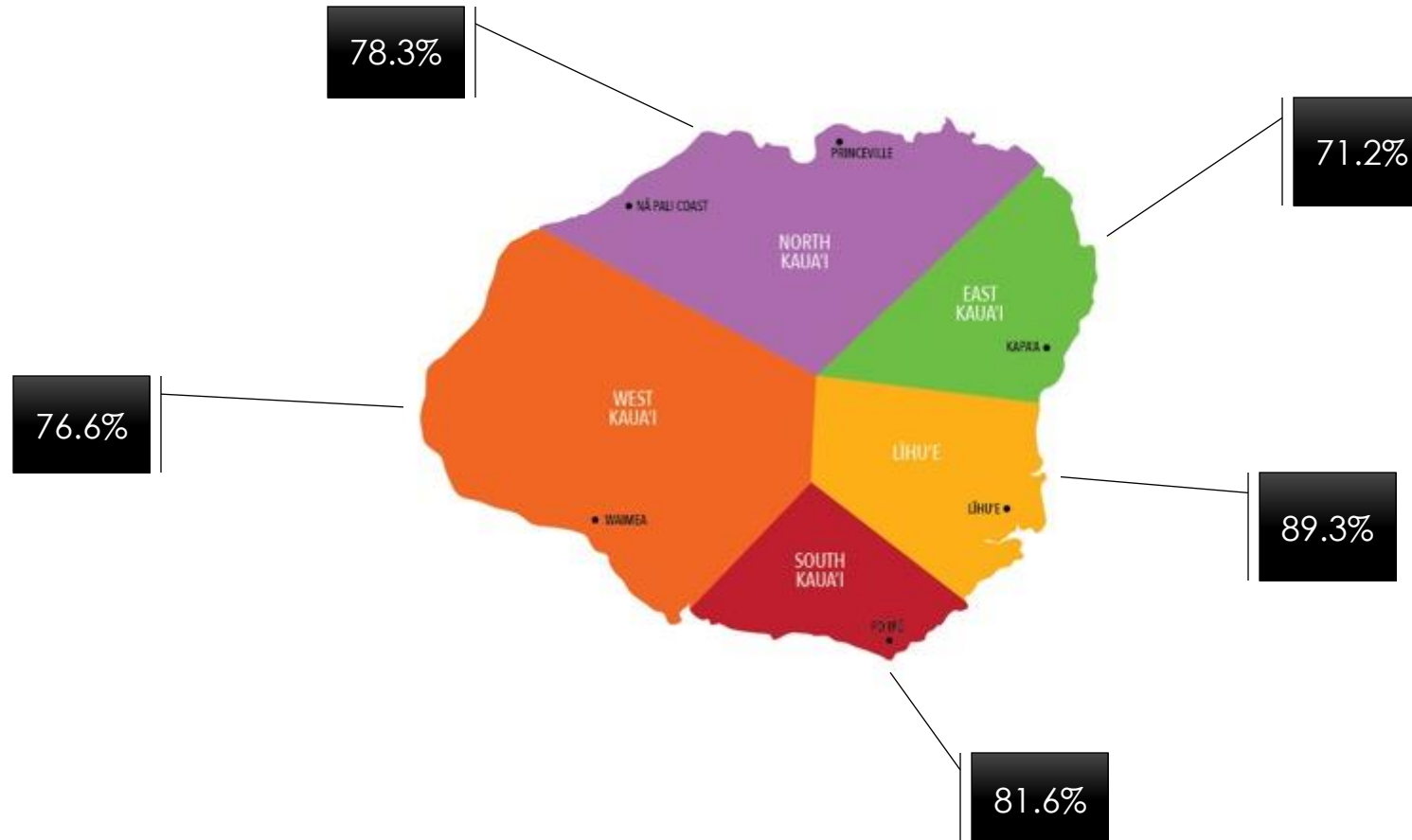
AREAS VISITED - KAUA'I CHINA



AREAS VISITED - KAUA'I KOREA



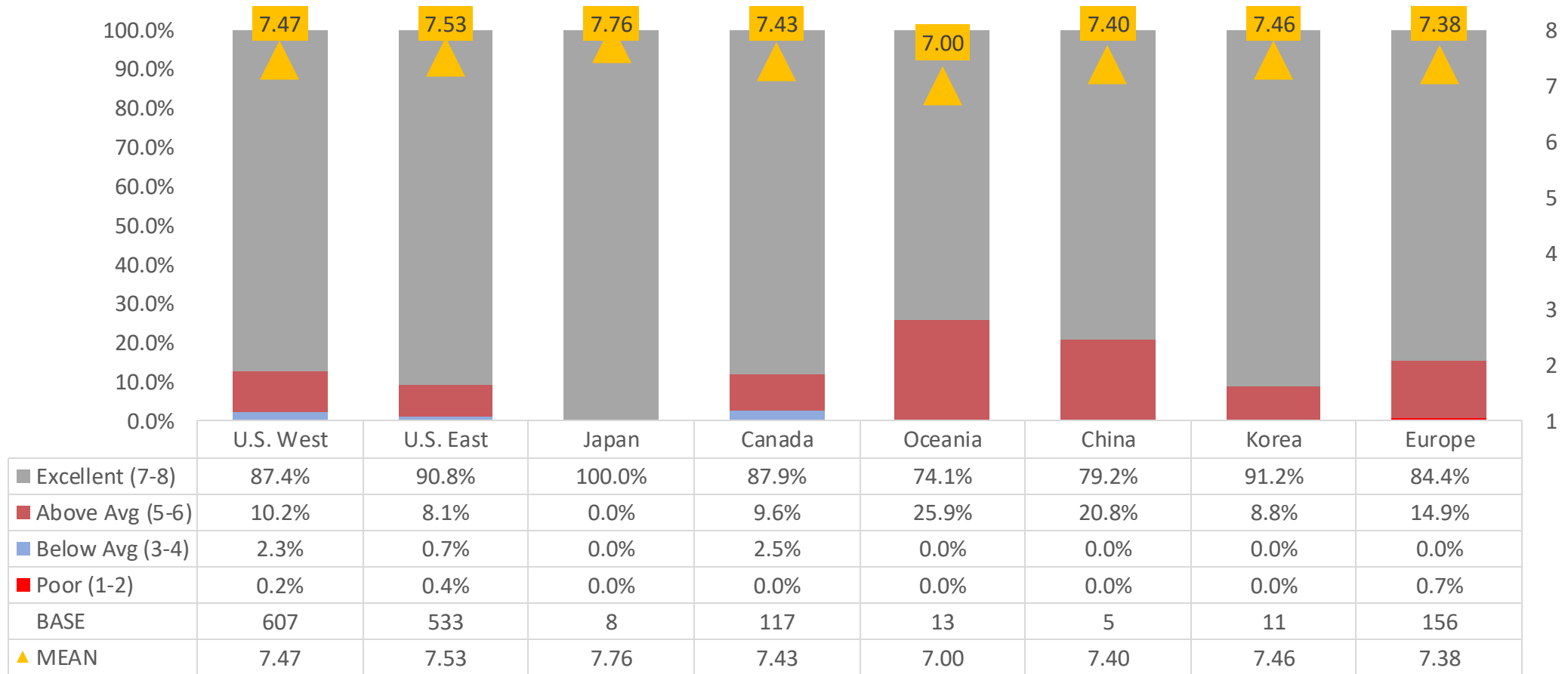
AREAS VISITED - KAUA'I EUROPE



Section 9 – Maui

SATISFACTION - MAUI

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

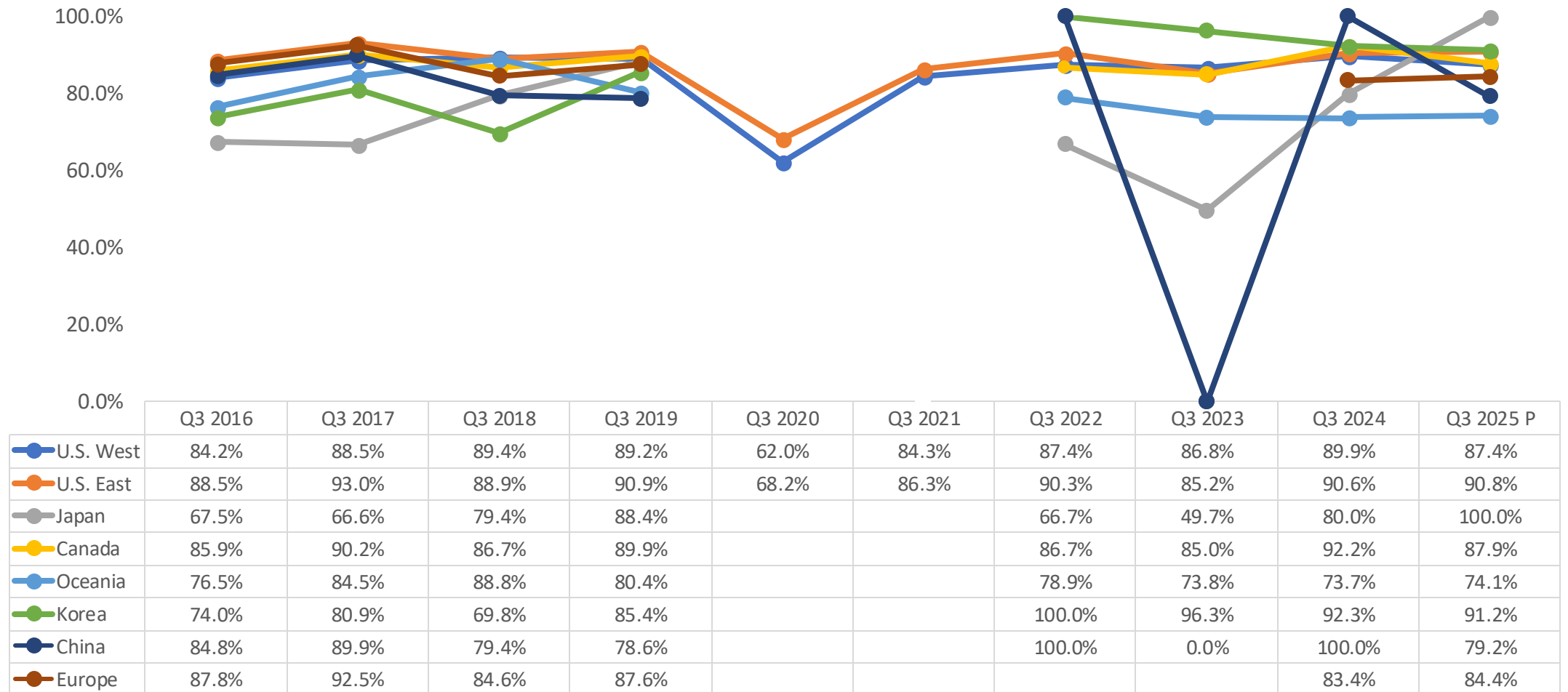


SATISFACTION – MAUI

- **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

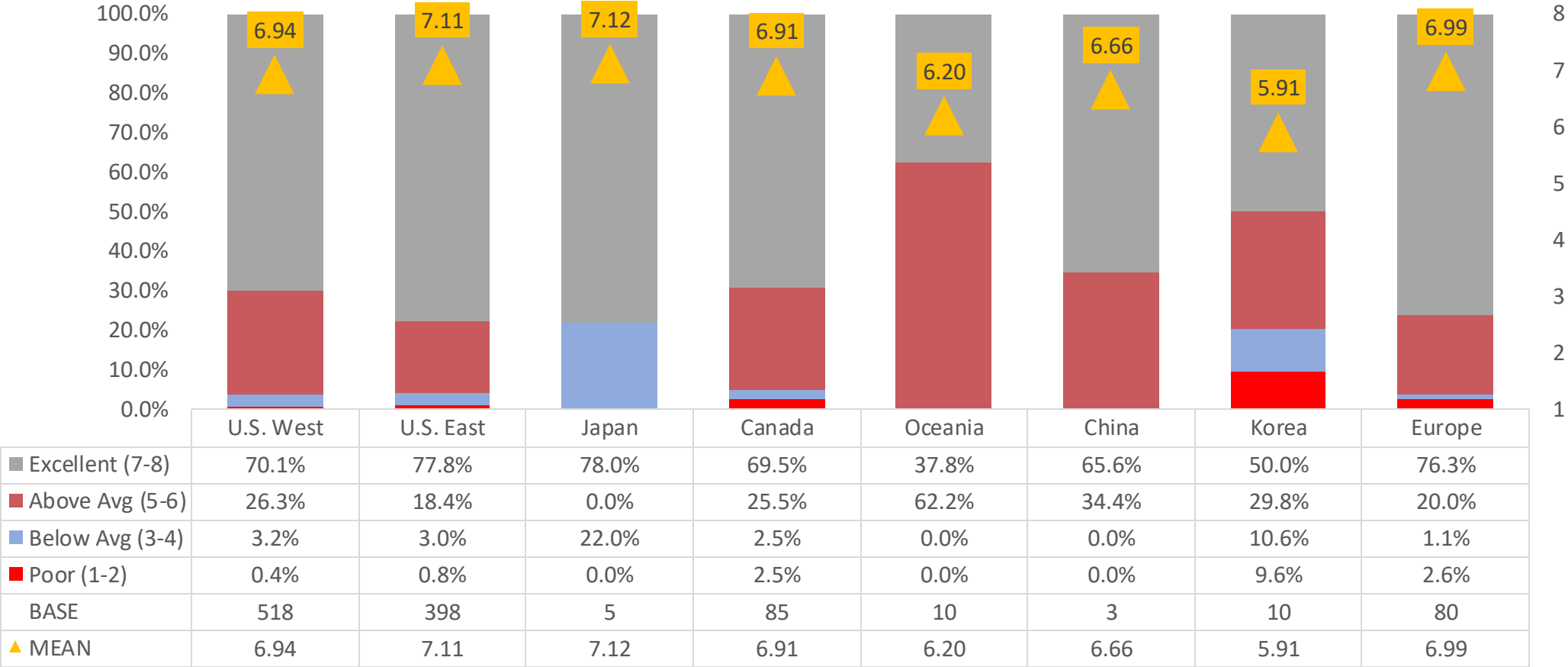
Q. How would you rate your most recent trip to the state of Hawai'i? How would you rate your experience on___?

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.



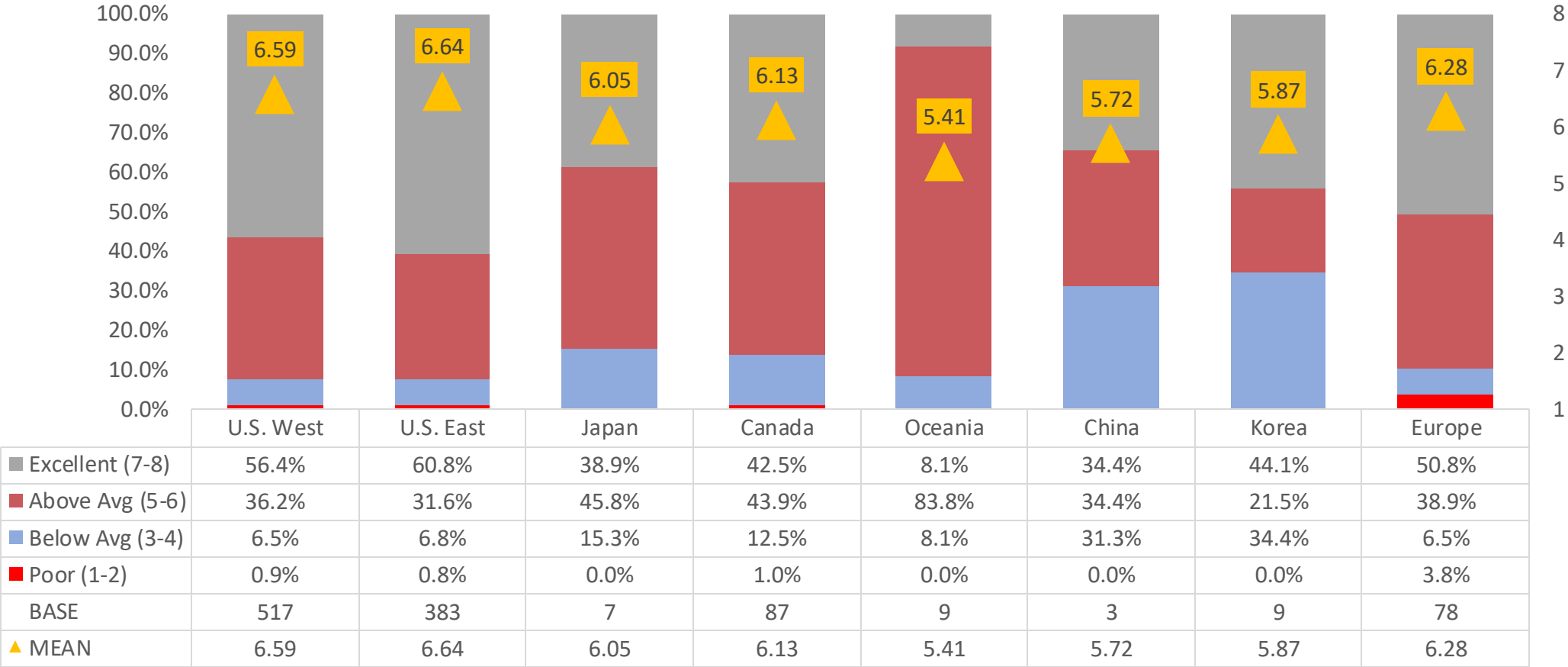
ENTERTAINMENT/ ATTRACTIONS - MAUI

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



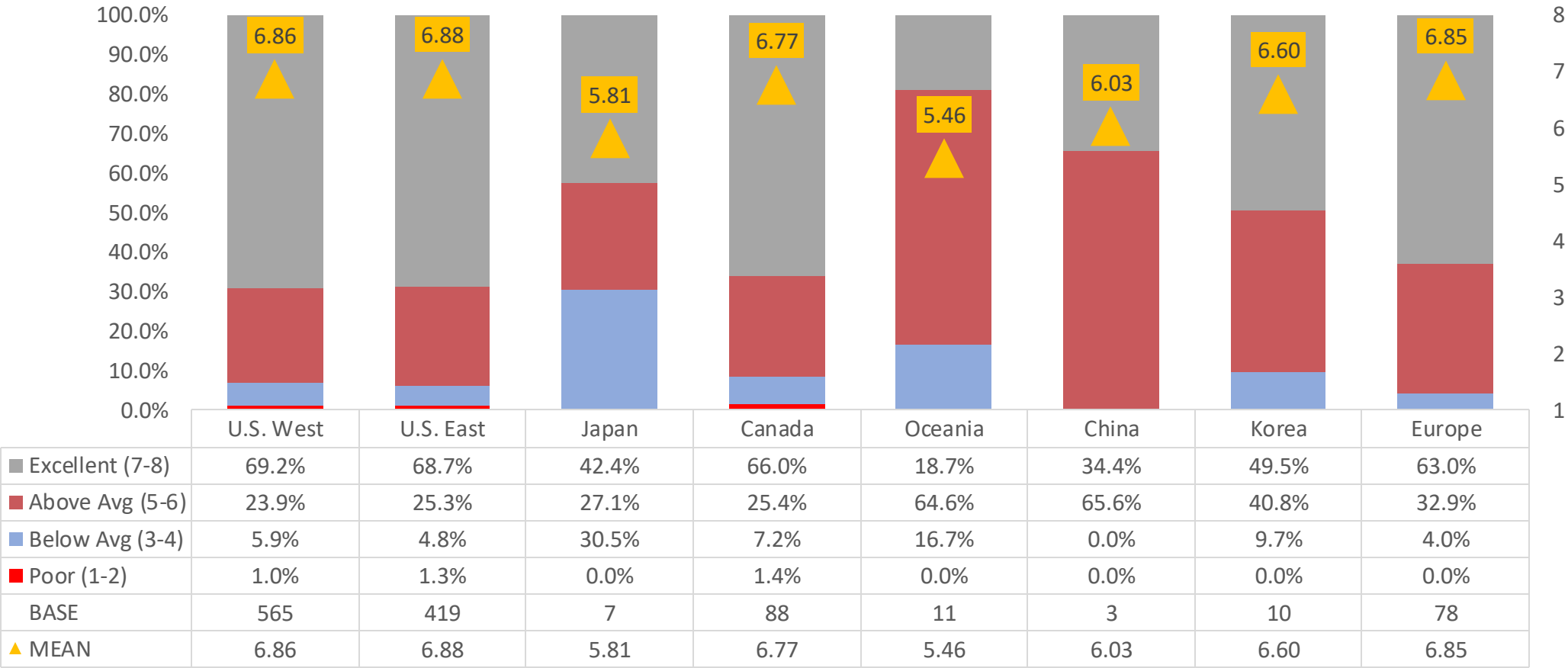
SHOPPING - MAUI

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



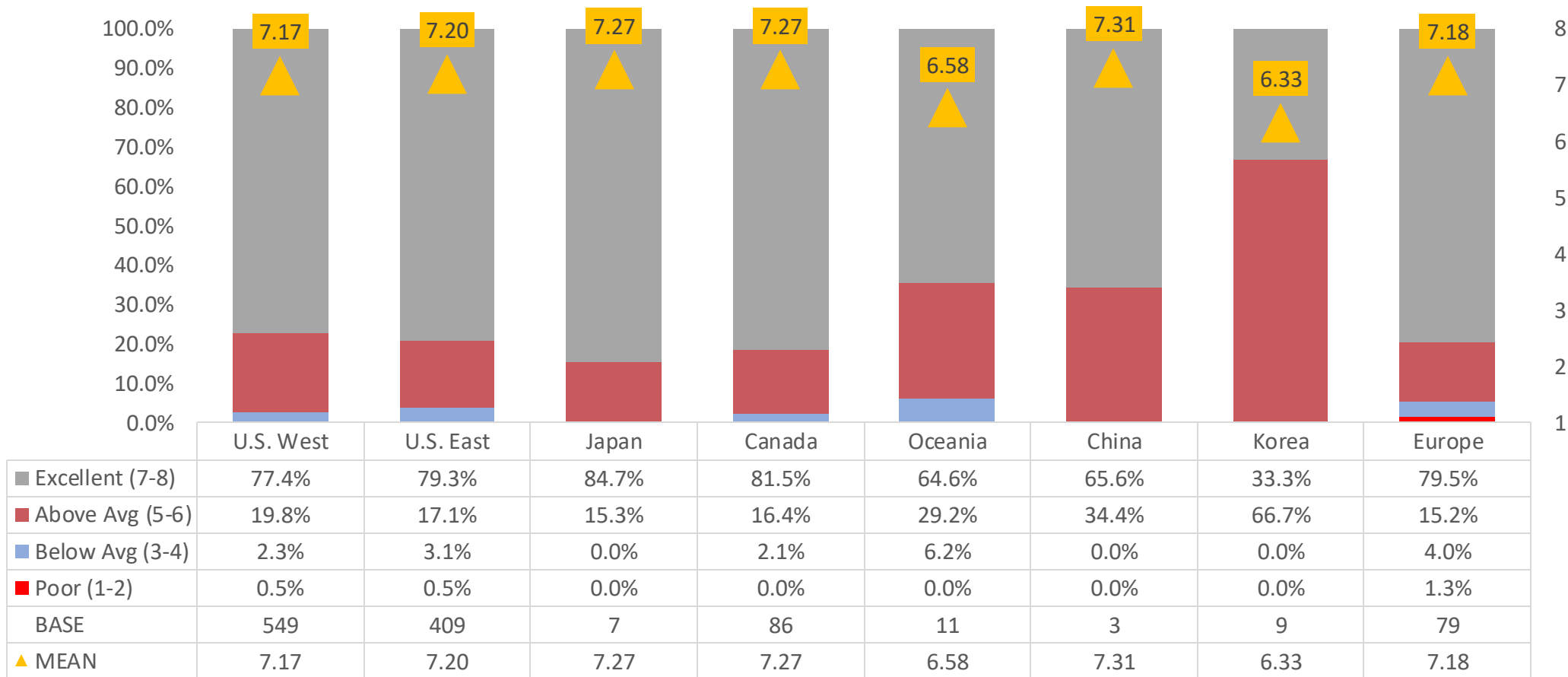
DINING/ FOOD & BEVERAGE - MAUI

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



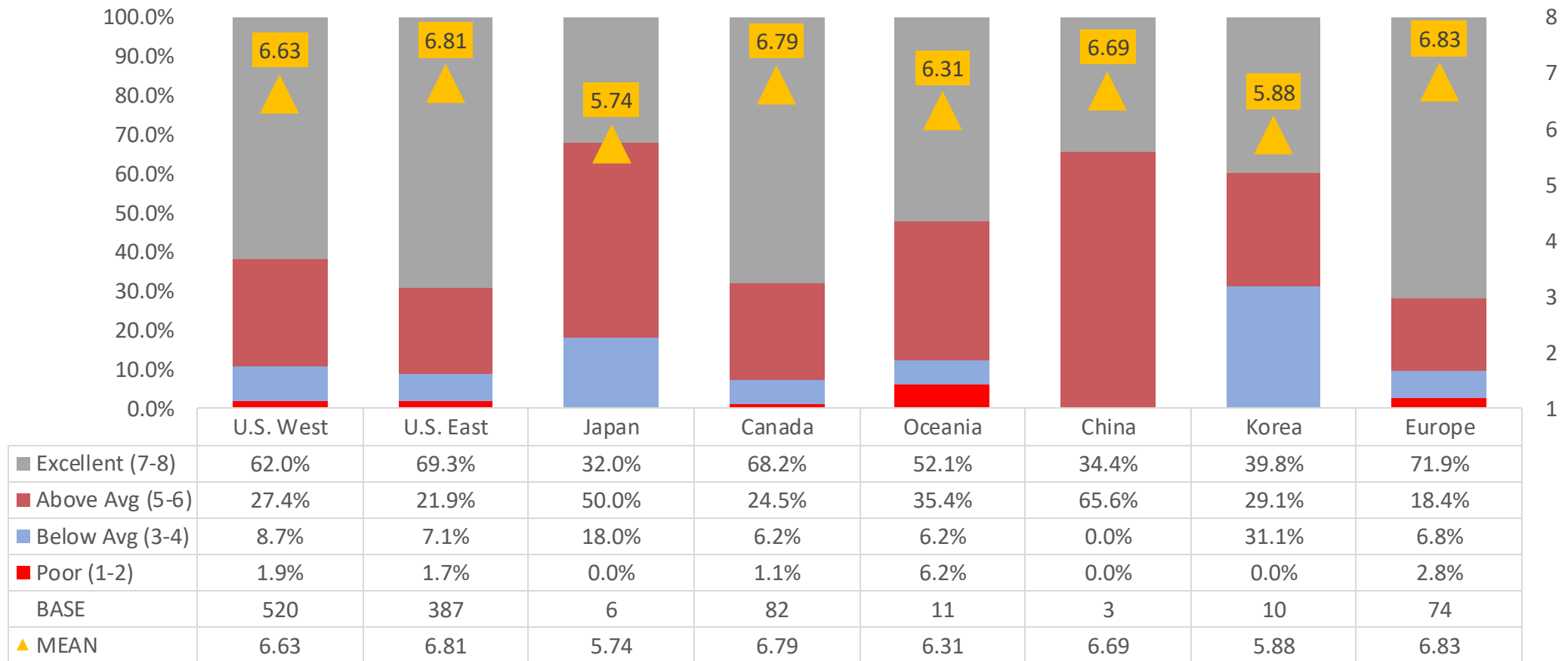
LODGING/ ACCOMMODATIONS - MAUI

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



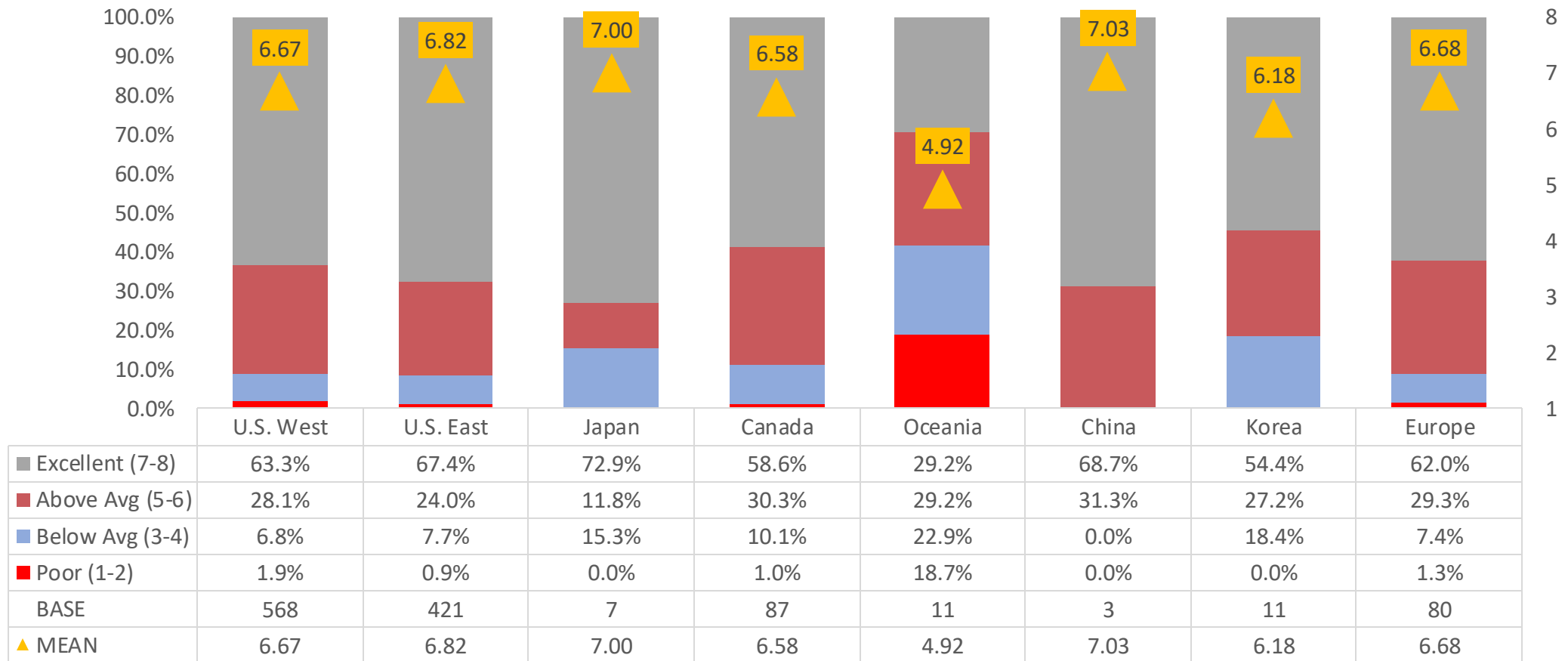
TRANSPORTATION ON ISLAND - MAUI

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



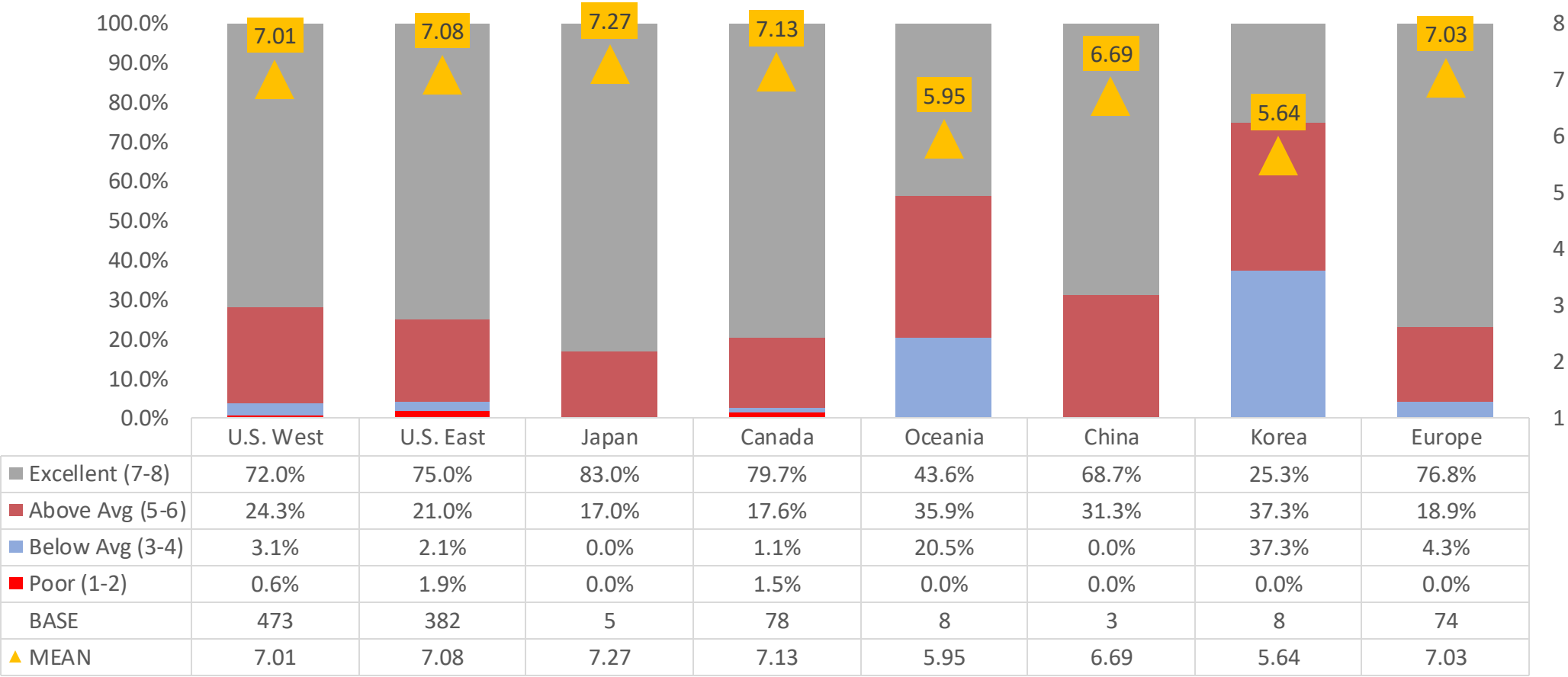
AIRPORT - MAUI

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



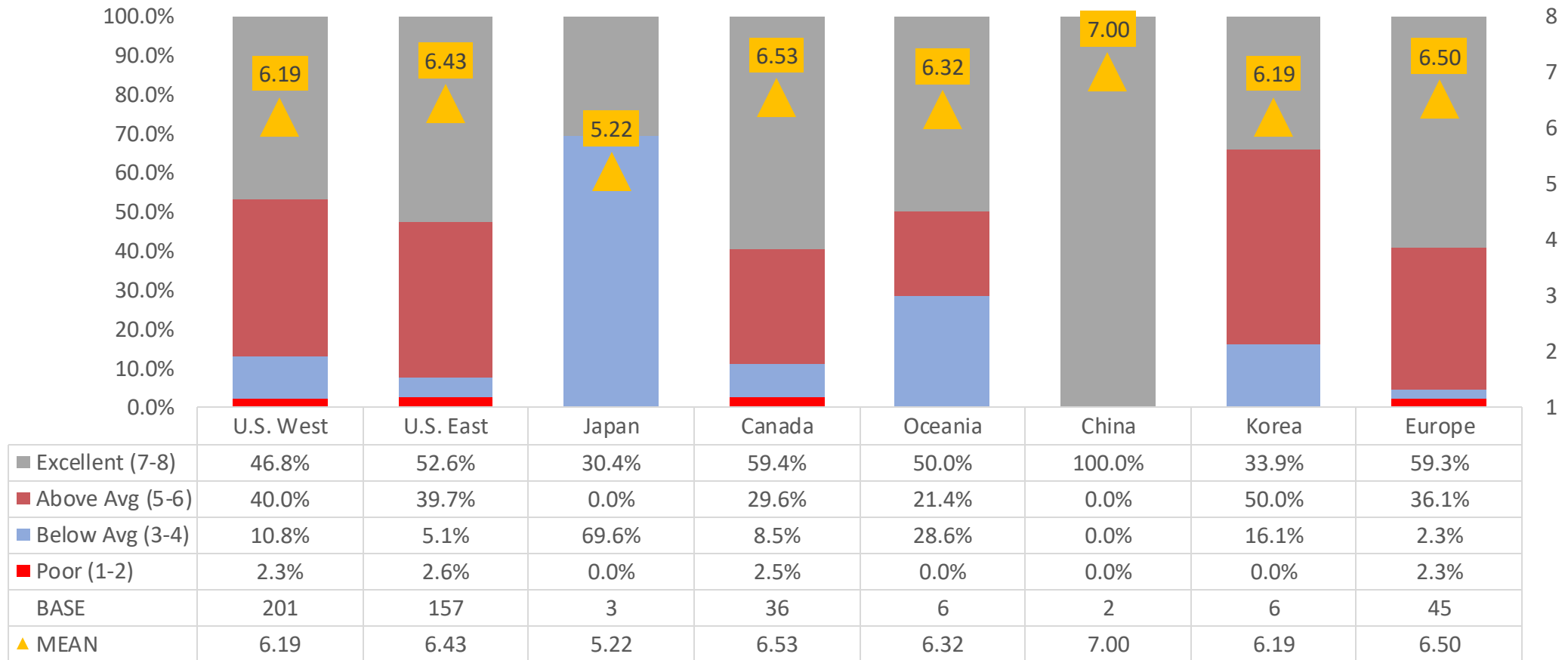
CULTURAL EXPERIENCES - MAUI

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



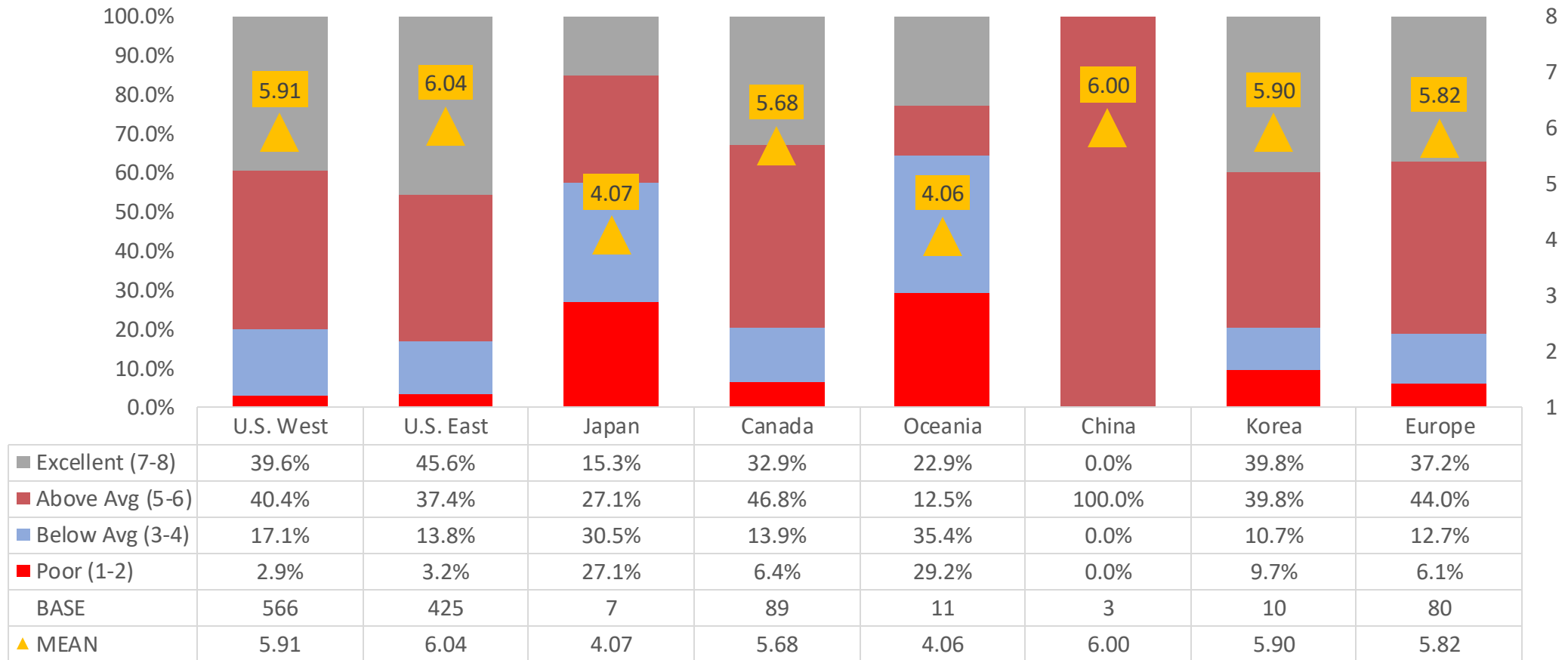
VOLUNTEER EXPERIENCES - MAUI

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



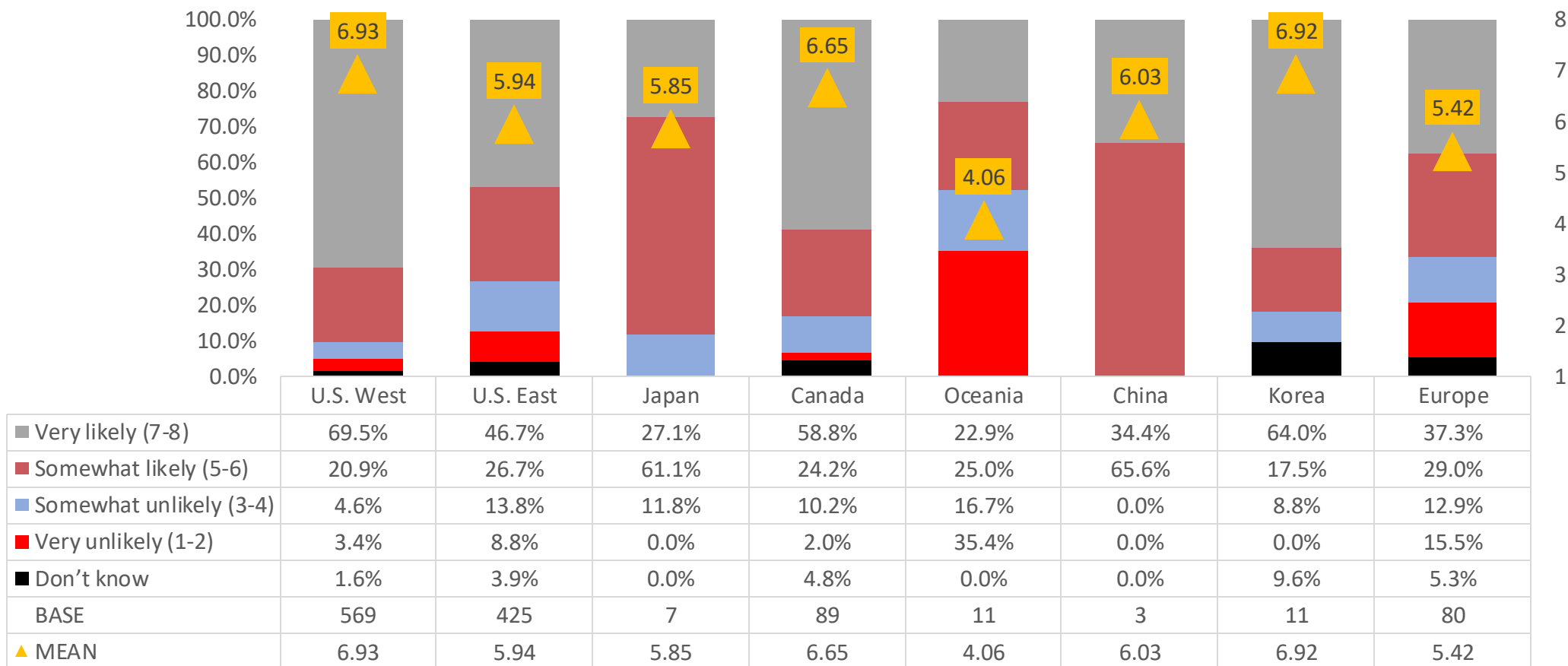
VALUE FOR THE MONEY – MAUI

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



LIKELIHOOD OF RETURN VISIT - MAUI

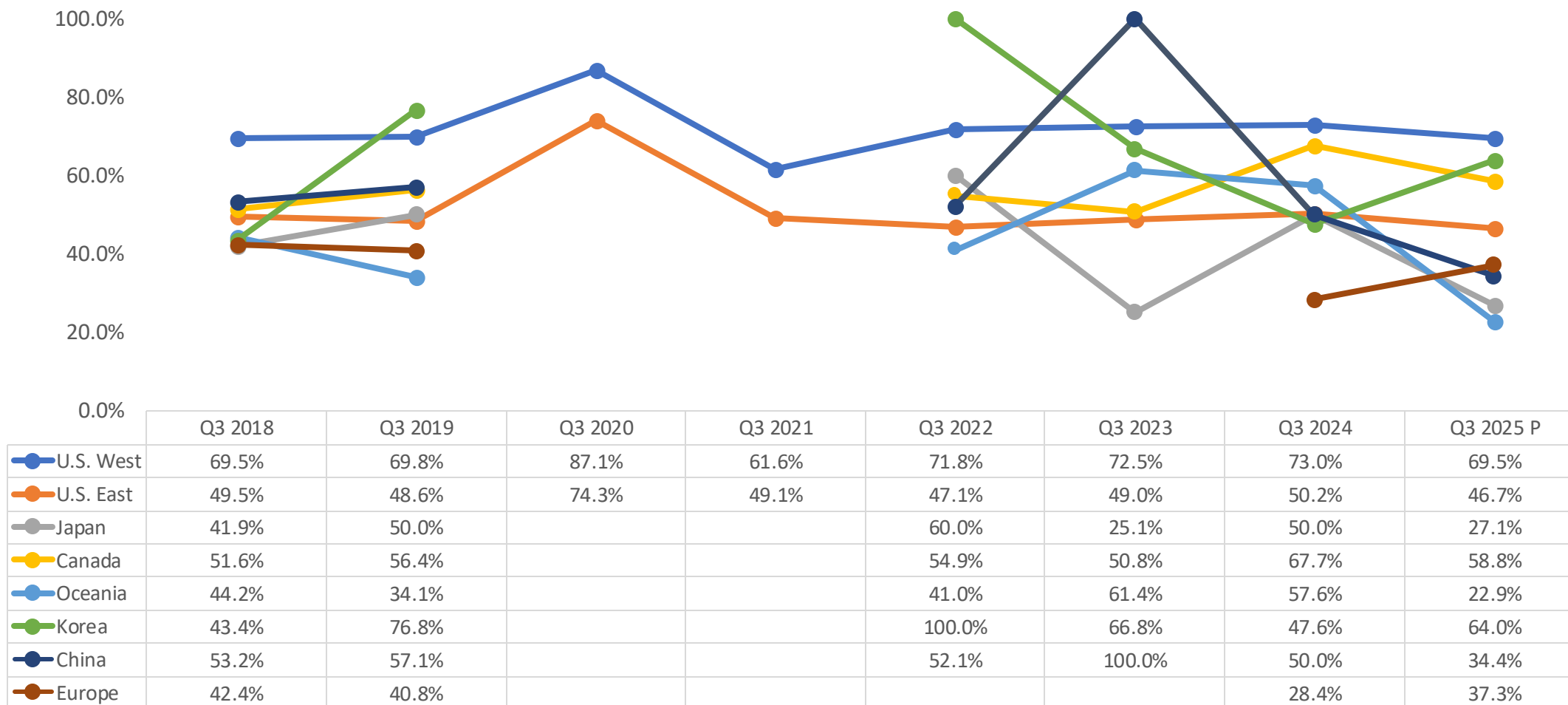
8-pt Rating Scale
8 = Very likely / 1 = Very unlikely



LIKELIHOOD OF RETURN VISIT - MAUI

TOP BOX - VERY LIKELY (7-8)

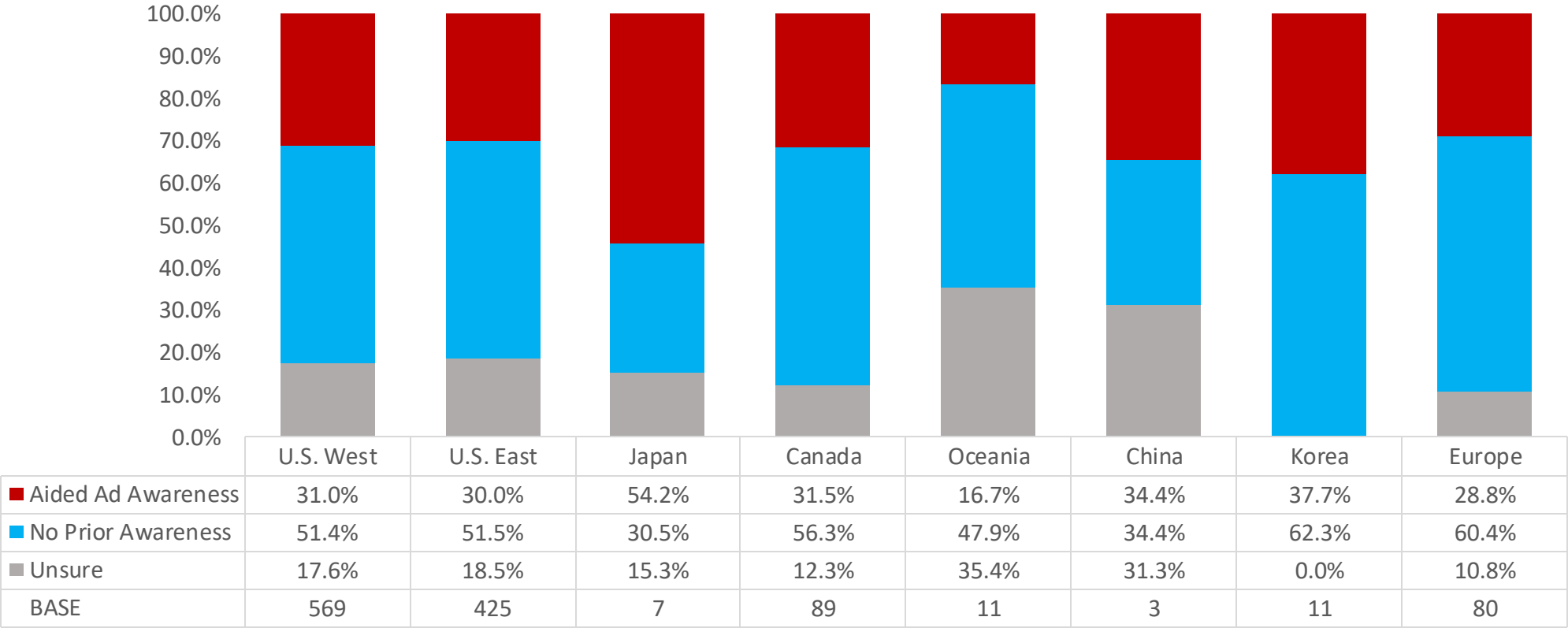
100.0%
80.0%
60.0%
40.0%
20.0%
0.0%



P= Preliminary Data

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

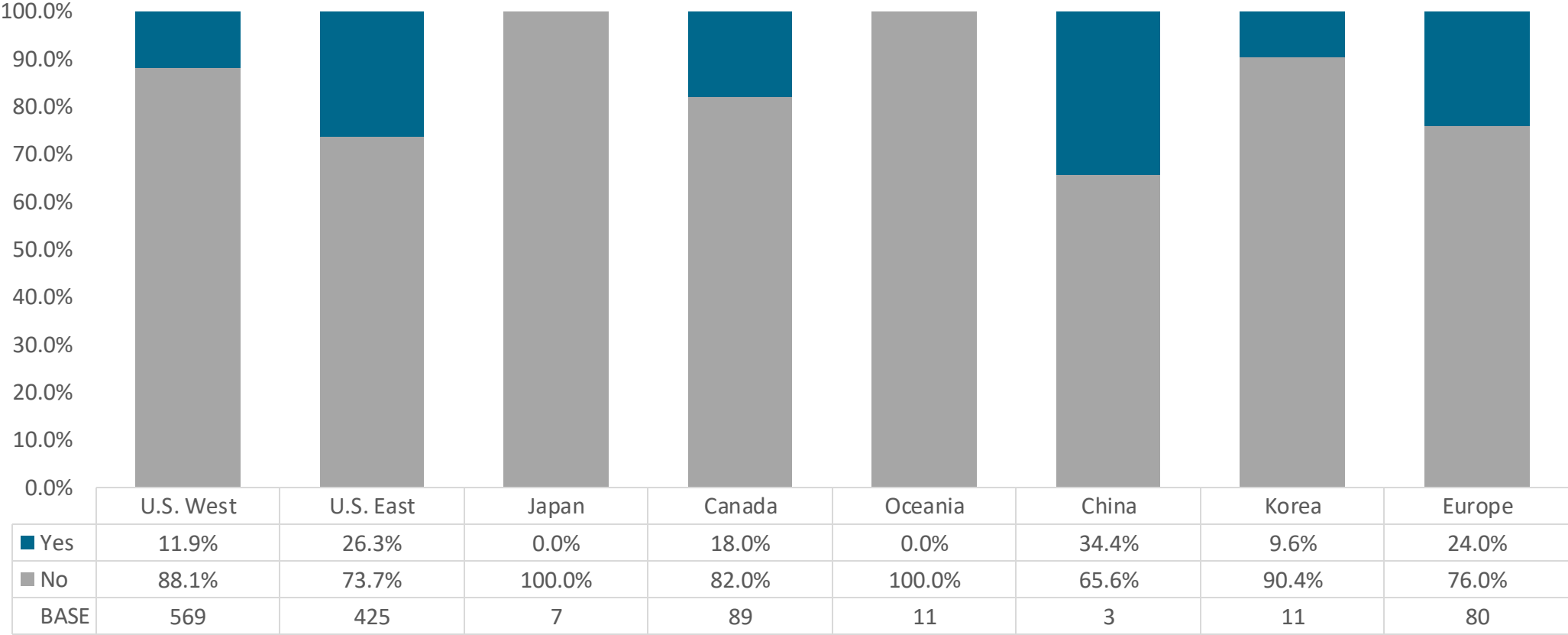
AIDED ADVERTISING AWARENESS - MAUI



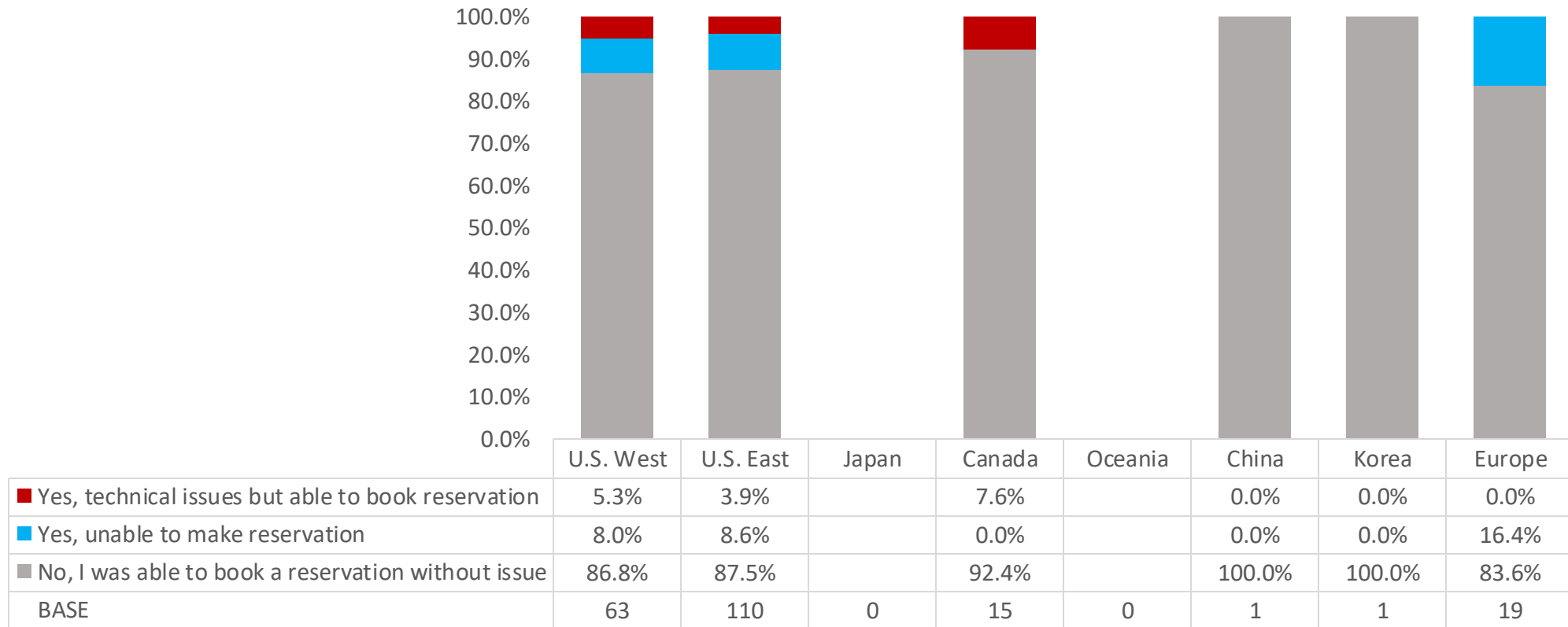
MOTIVATING FACTORS - MAUI

	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/ 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

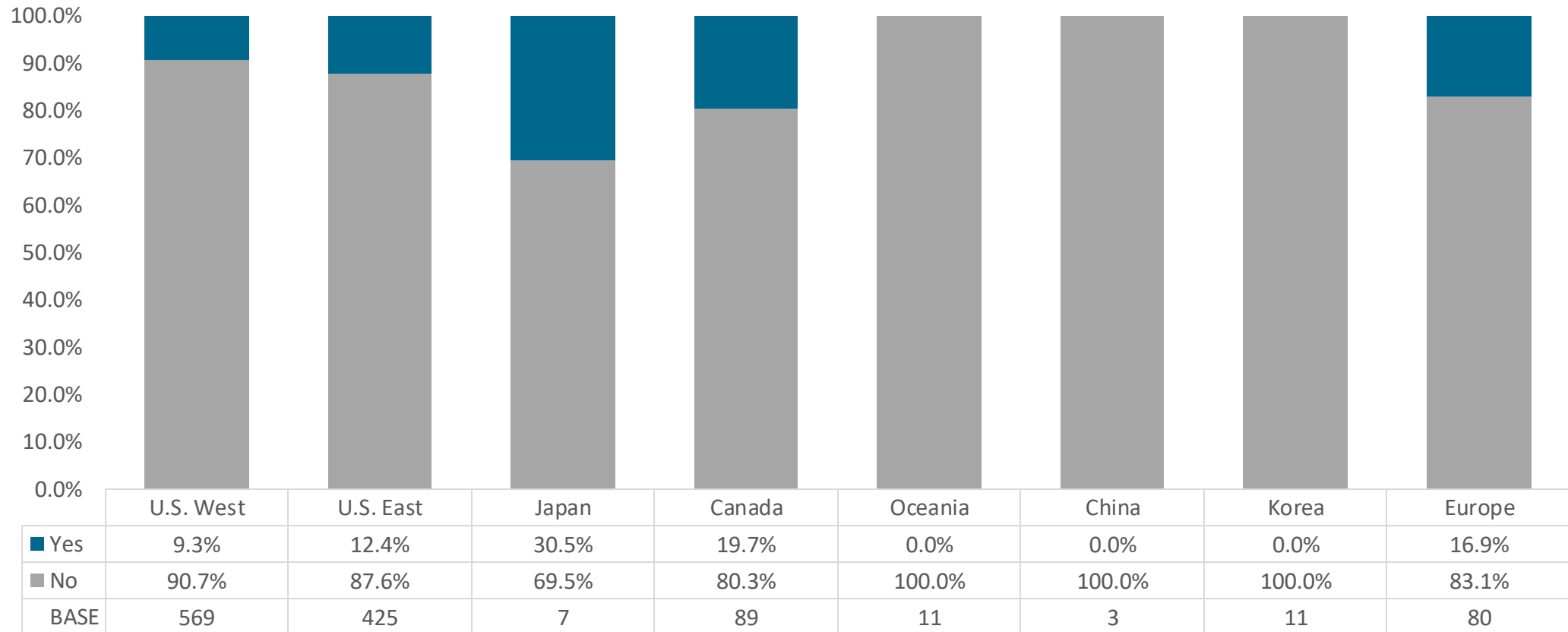
WAI‘ĀNAPANAPA STATE PARK - RESERVATIONS SYSTEM USE



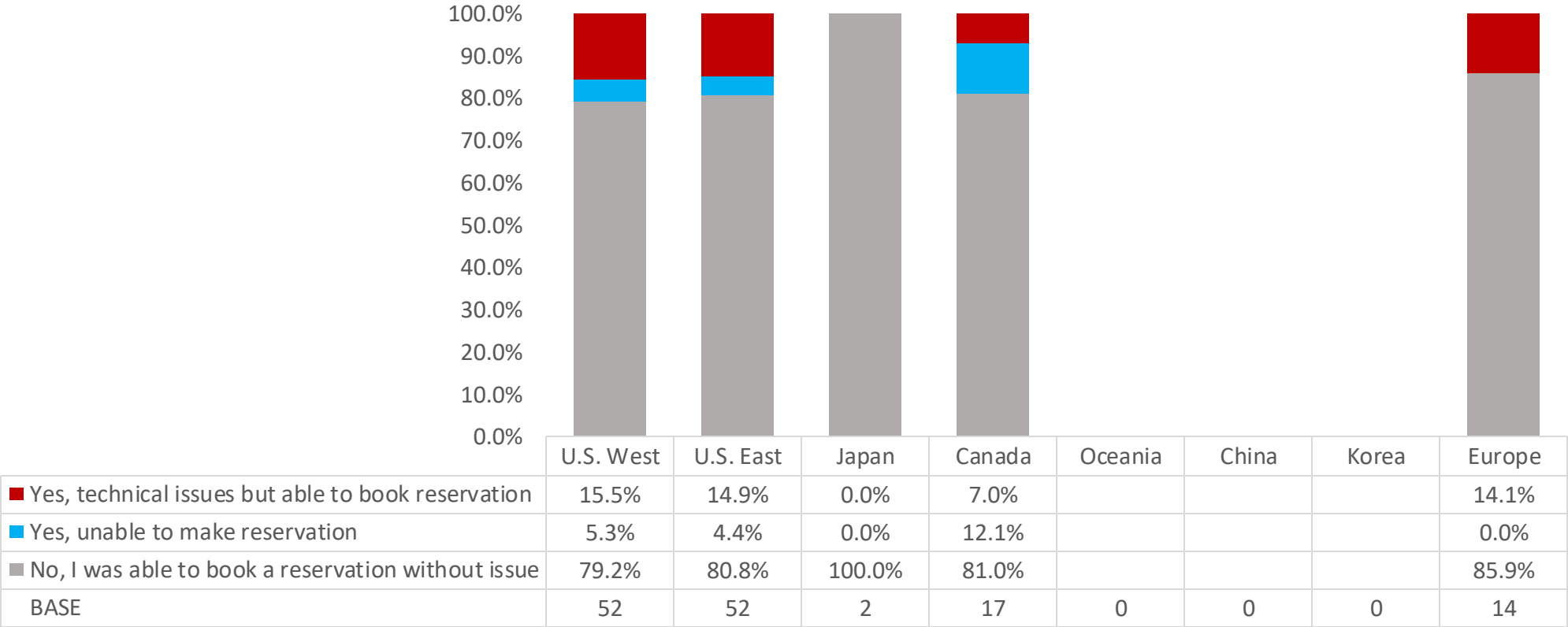
WAI‘ĀNAPANAPA STATE PARK - RESERVATIONS SYSTEM PROBLEMS



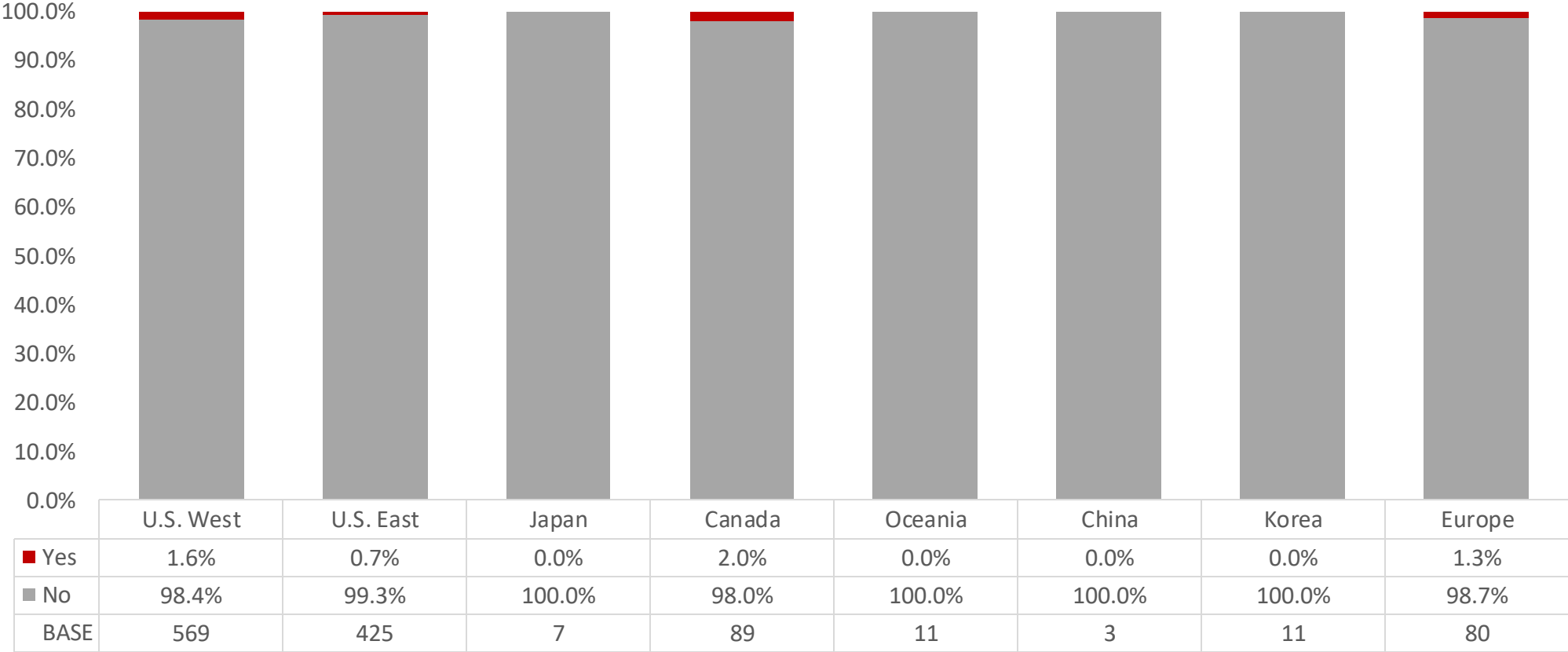
‘ĪAO VALLEY STATE MONUMENT - RESERVATIONS SYSTEM USE



‘ĪAO VALLEY STATE MONUMENT - RESERVATIONS SYSTEM PROBLEMS



VISITED MAUI FOR SPECIFIC EVENT

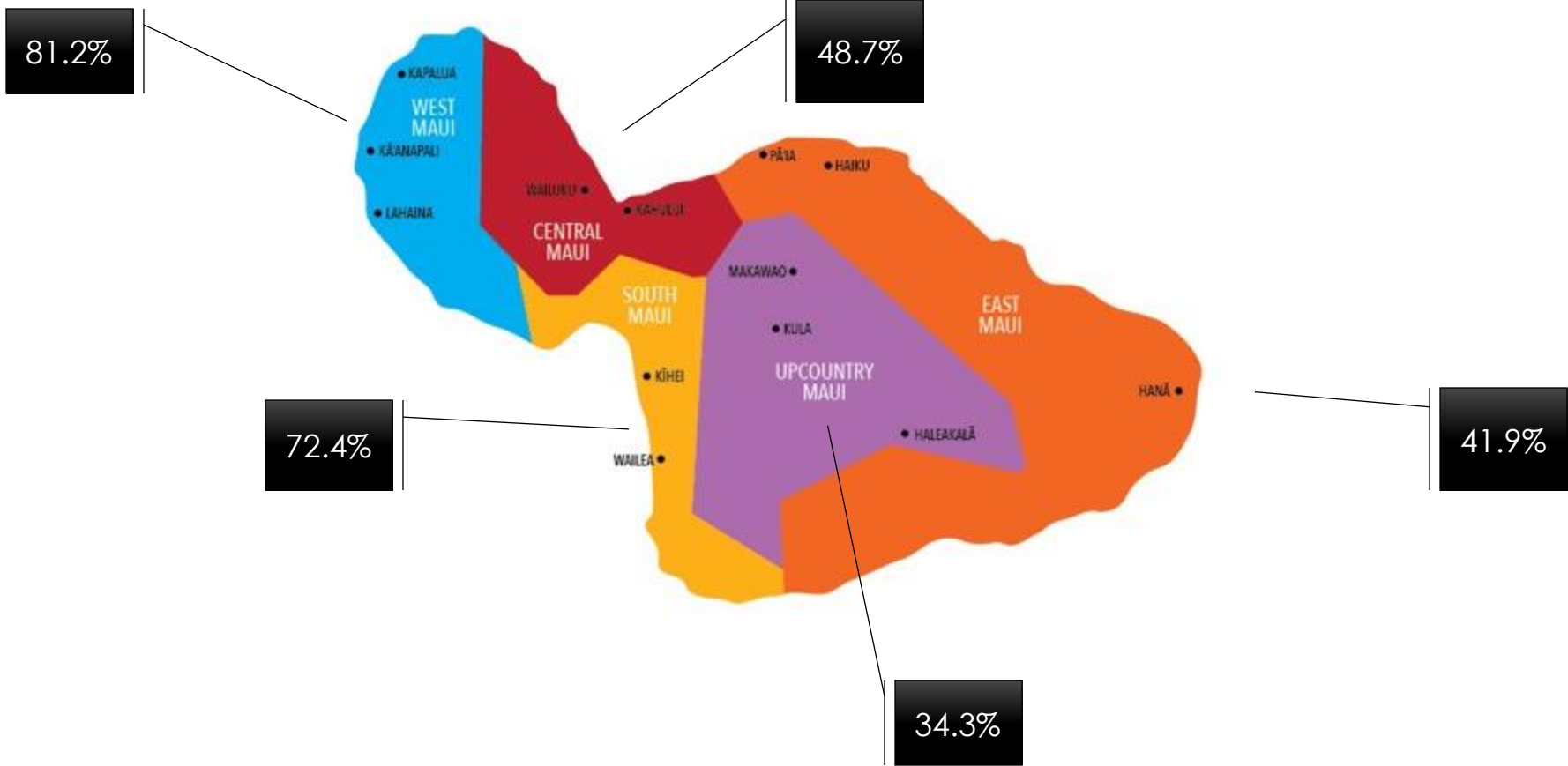


VISITED MAUI FOR SPECIFIC EVENT

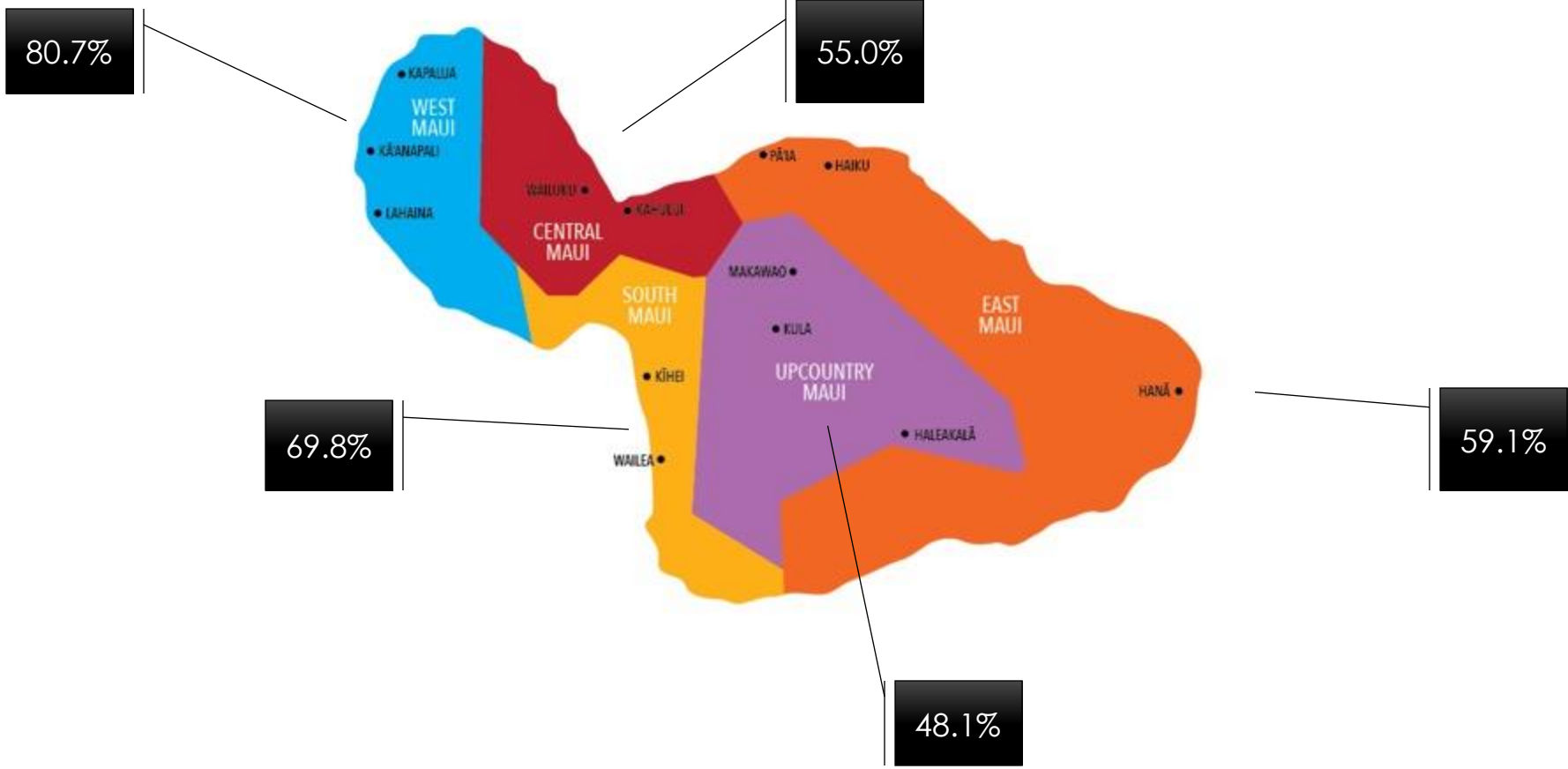
	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
Hawaii Food and Wine Festival	19.0%	0.0%	-	0.0%	-	-	-	100.0%
Kapalua Food & Wine Festival	19.0%	0.0%	-	0.0%	-	-	-	0.0%
Maui Invitational	0.0%	38.4%	-	0.0%	-	-	-	0.0%
Other	61.9%	61.6%	-	100.0%	-	-	-	0.0%
BASE	8	3	0	2	0	0	0	1

AREAS VISITED - MAUI

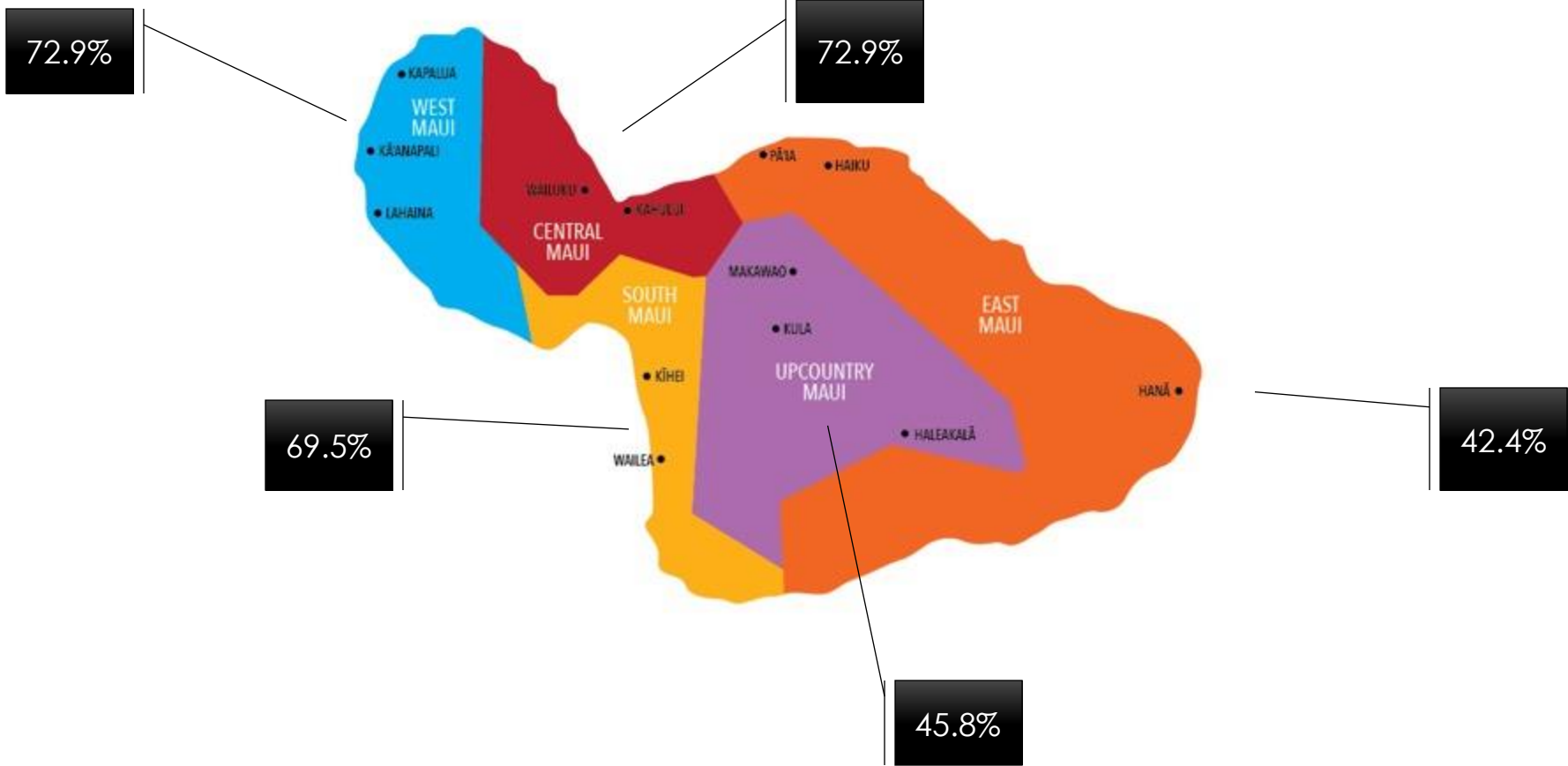
U.S. WEST



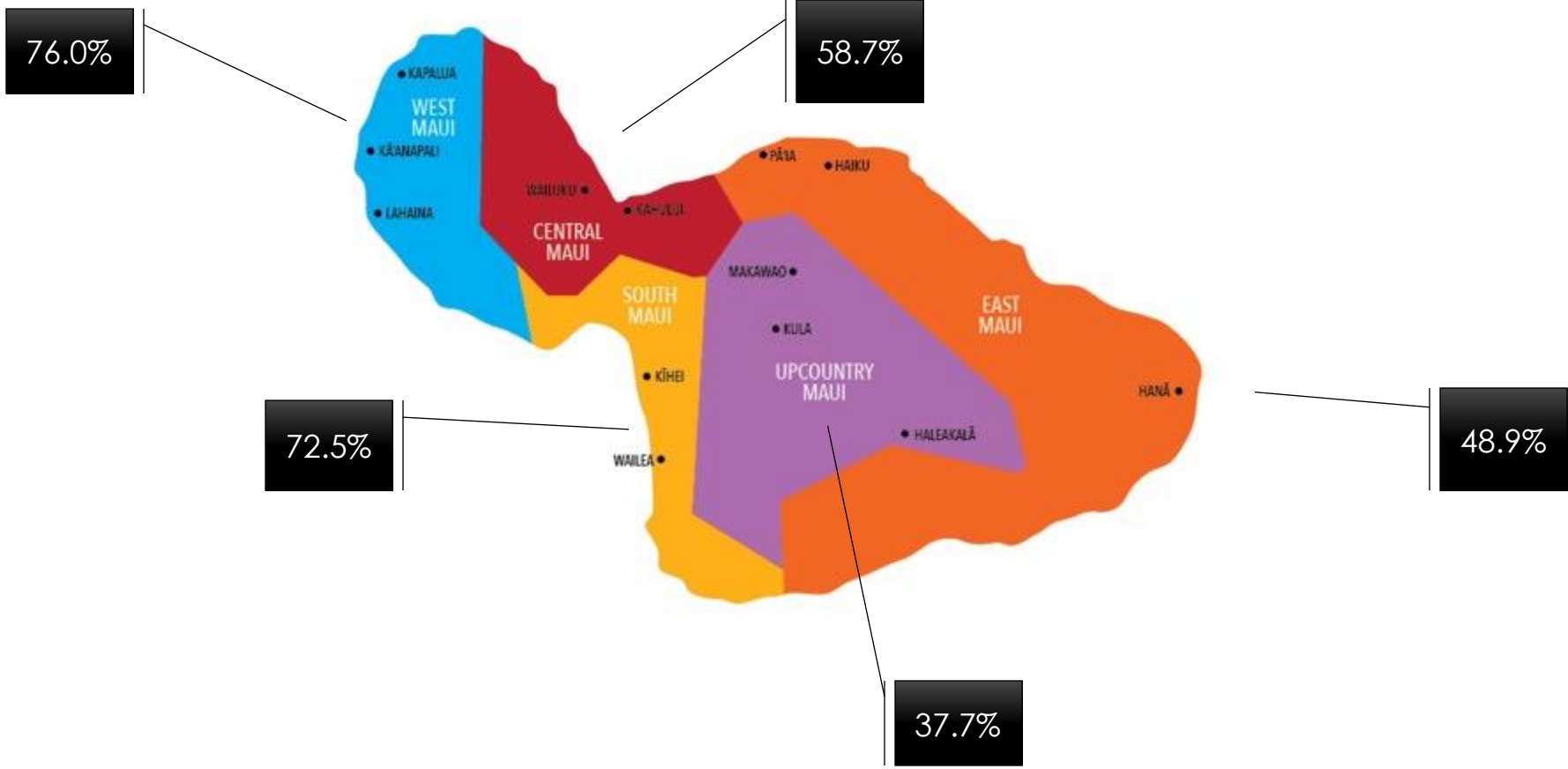
AREAS VISITED - MAUI U.S. EAST



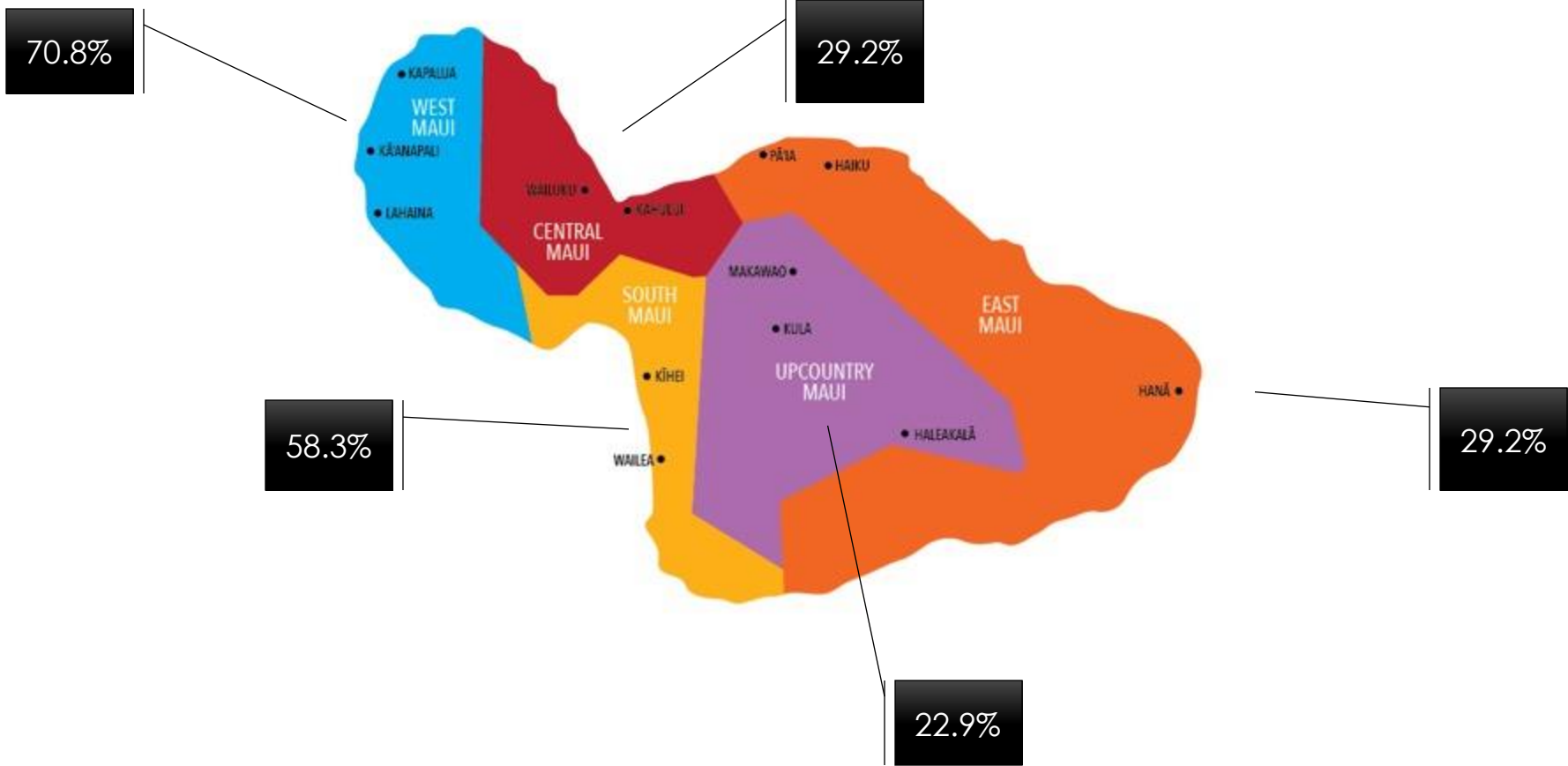
AREAS VISITED - MAUI JAPAN



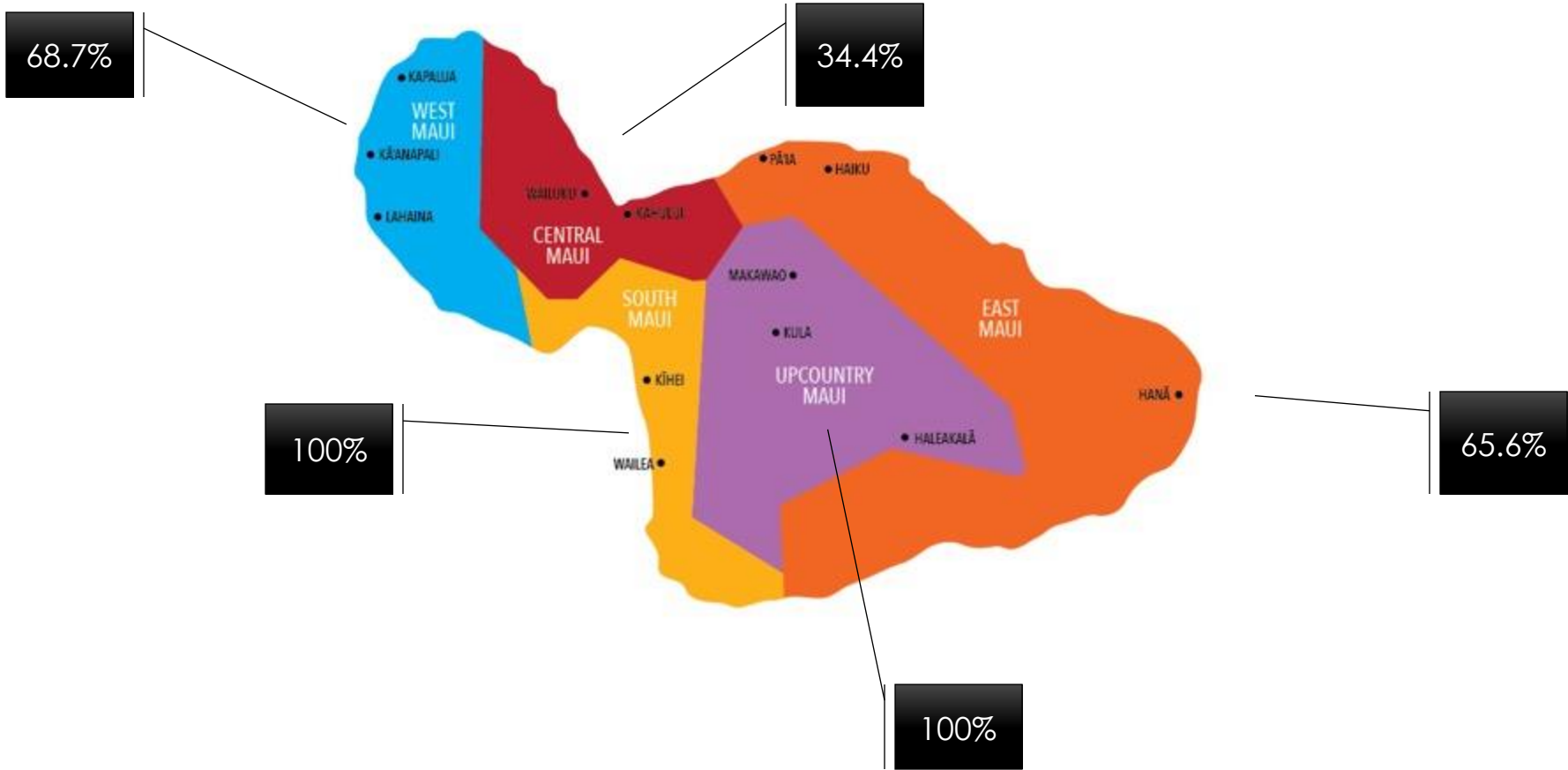
AREAS VISITED - MAUI CANADA



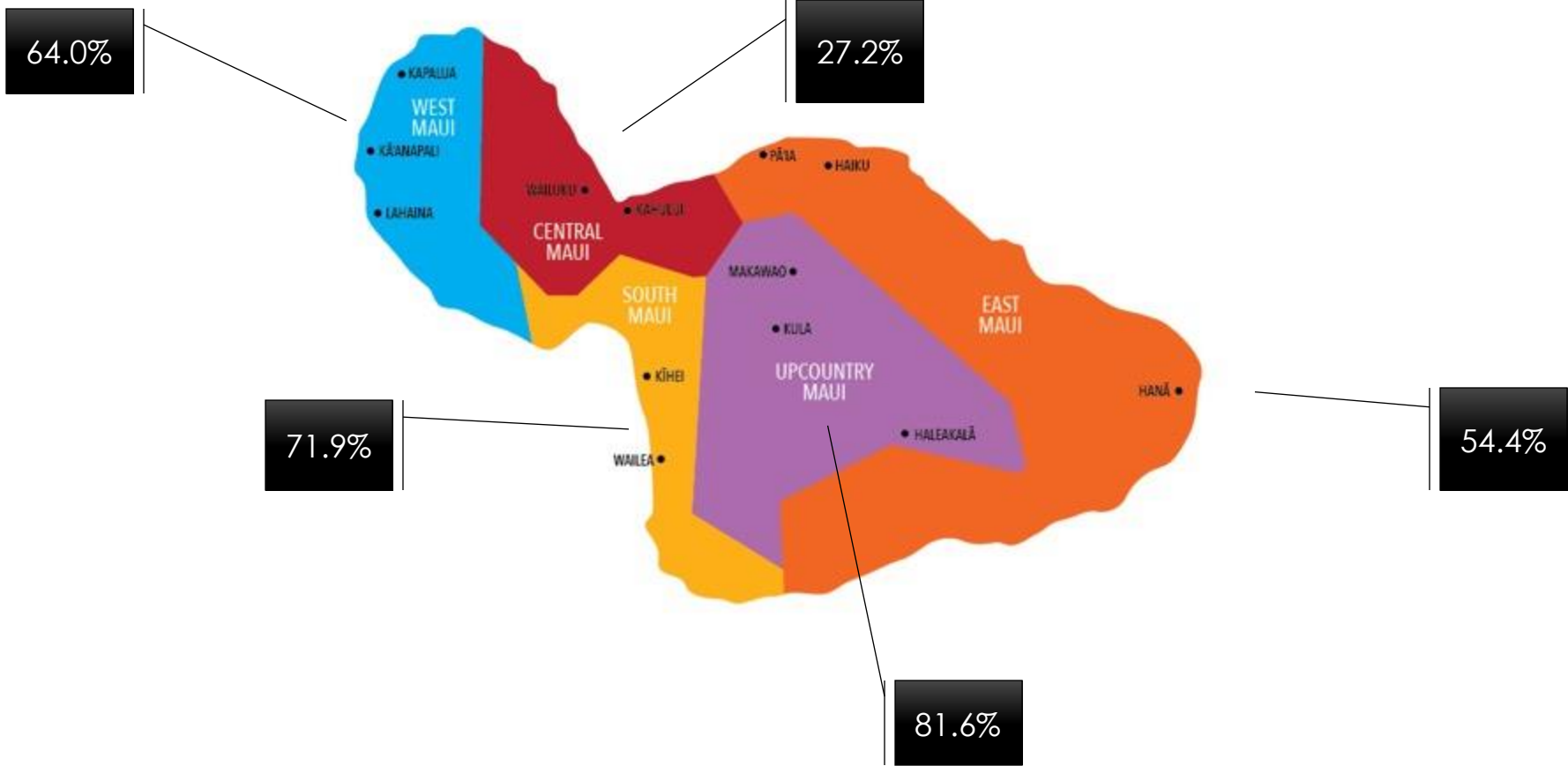
AREAS VISITED - MAUI OCEANIA



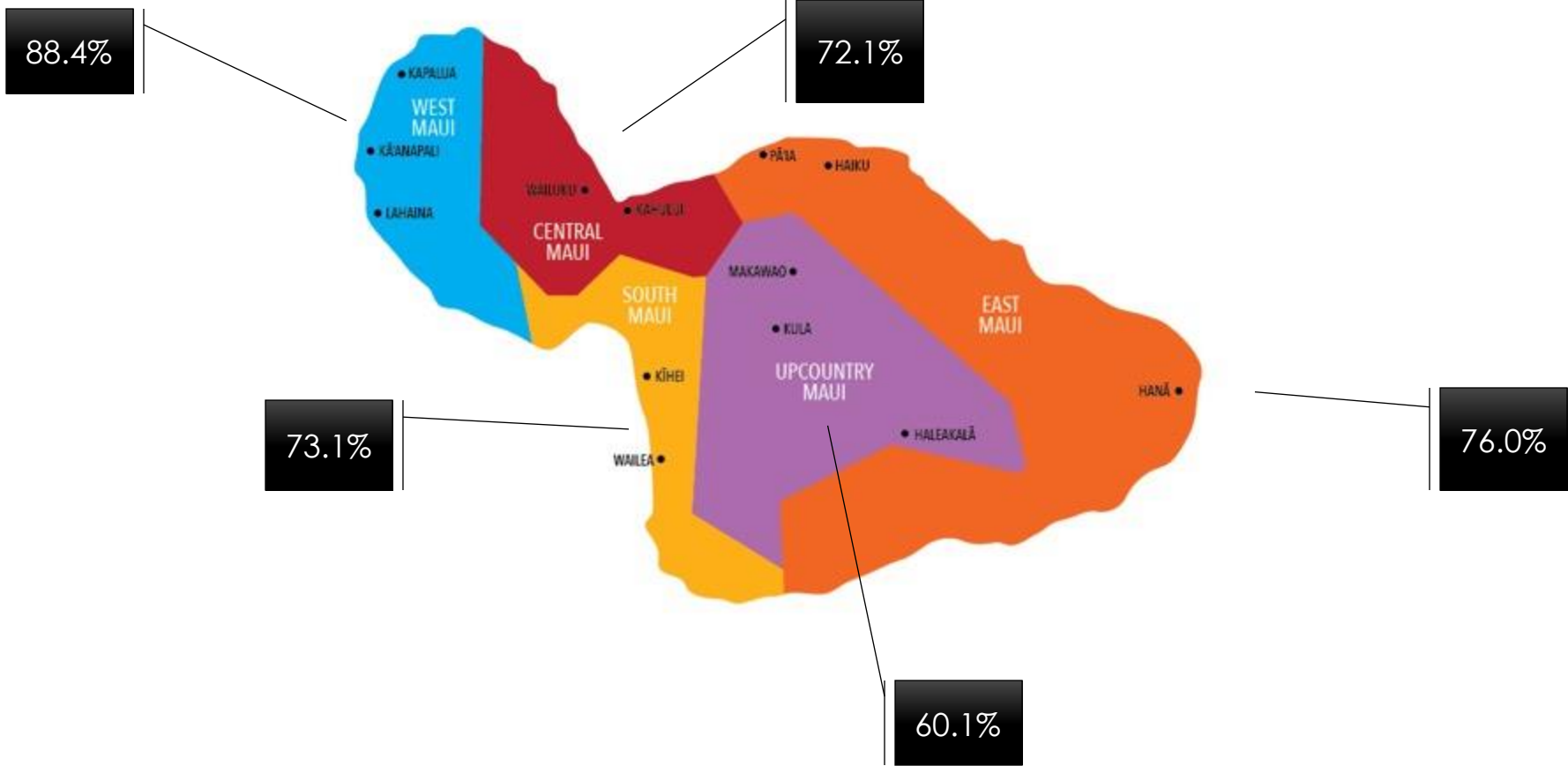
AREAS VISITED - MAUI CHINA



AREAS VISITED - MAUI KOREA



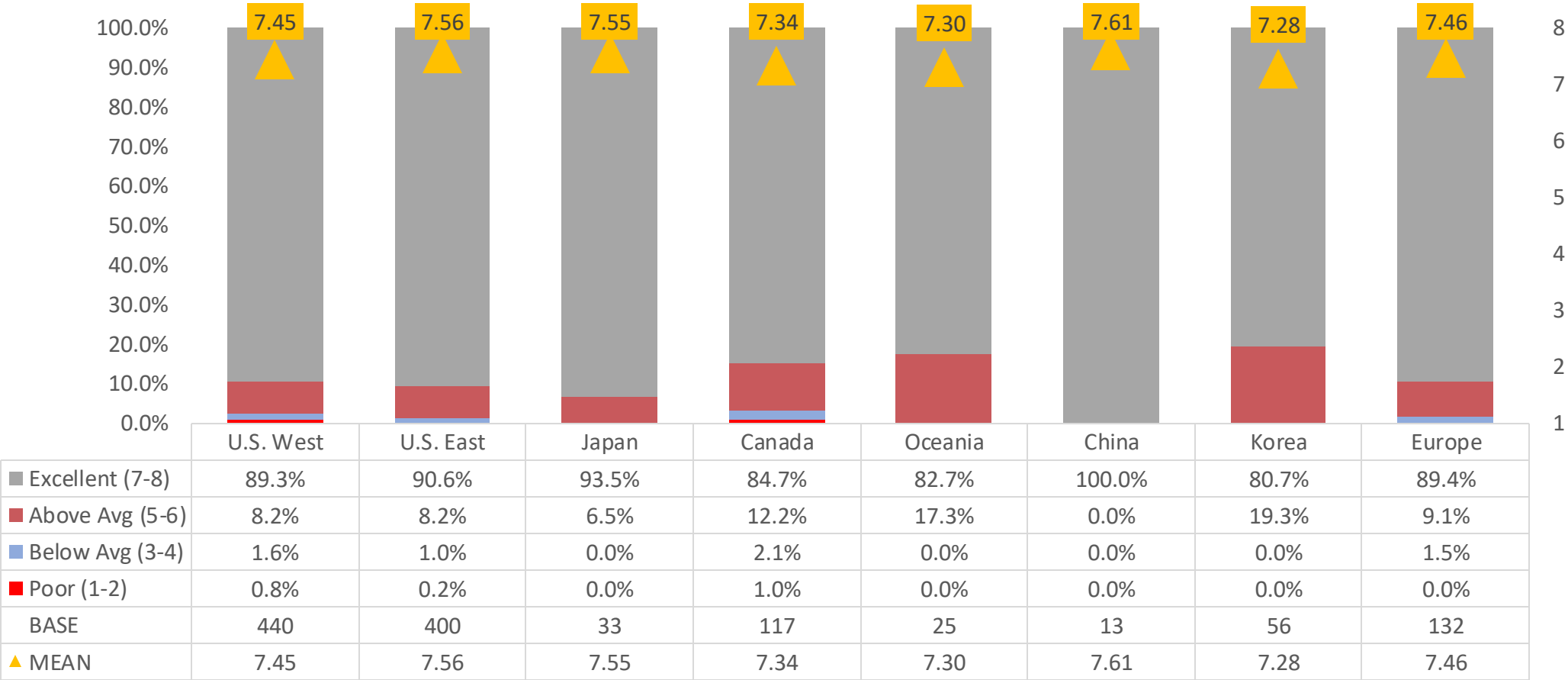
AREAS VISITED - MAUI EUROPE



Section 10 – Island of Hawai‘i

SATISFACTION - ISLAND OF HAWAI‘I

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



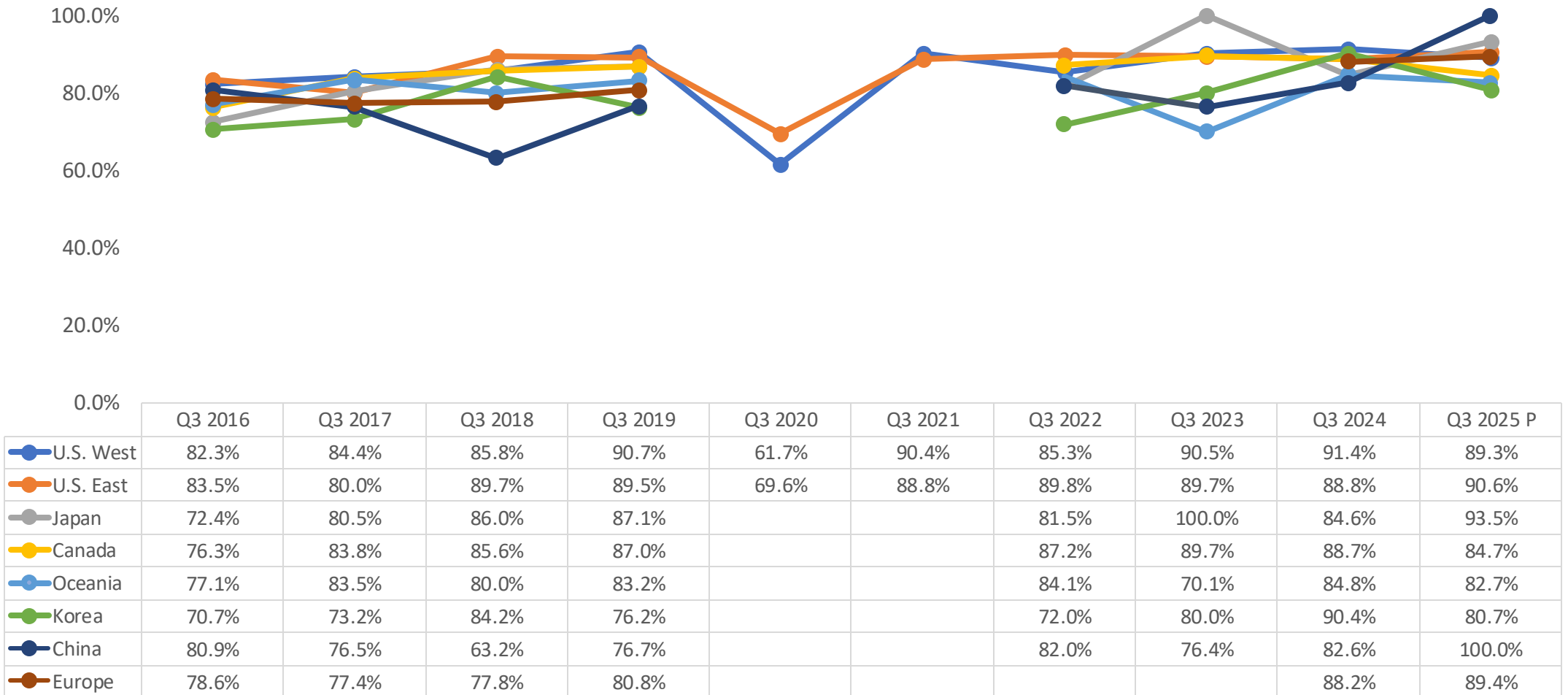
SATISFACTION - ISLAND OF HAWAI'I

- ***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 HAWAII

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

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



P= Preliminary Data

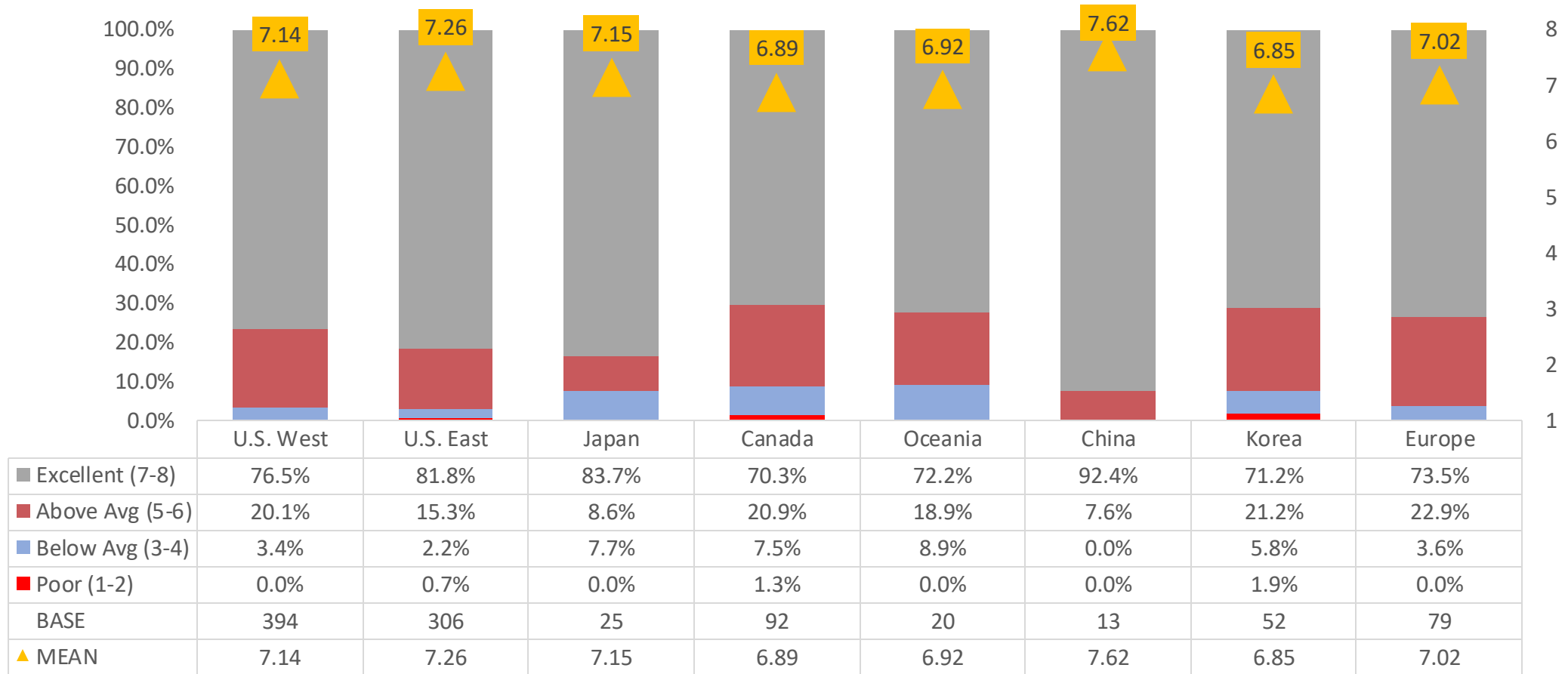
Q. How would you rate your most recent trip to the state of Hawai‘i? How would you rate your experience on___?

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.



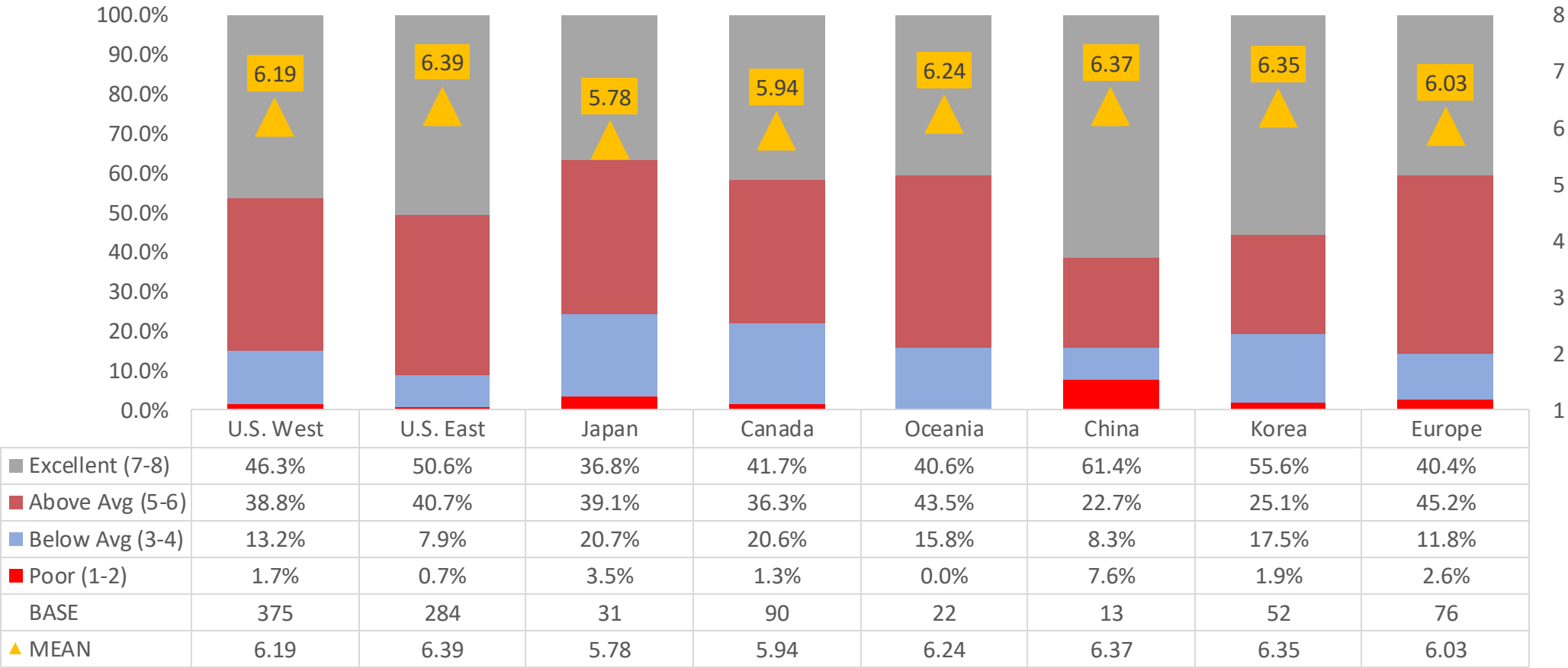
ENTERTAINMENT/ ATTRACTIONS - ISLAND OF HAWAI‘I

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



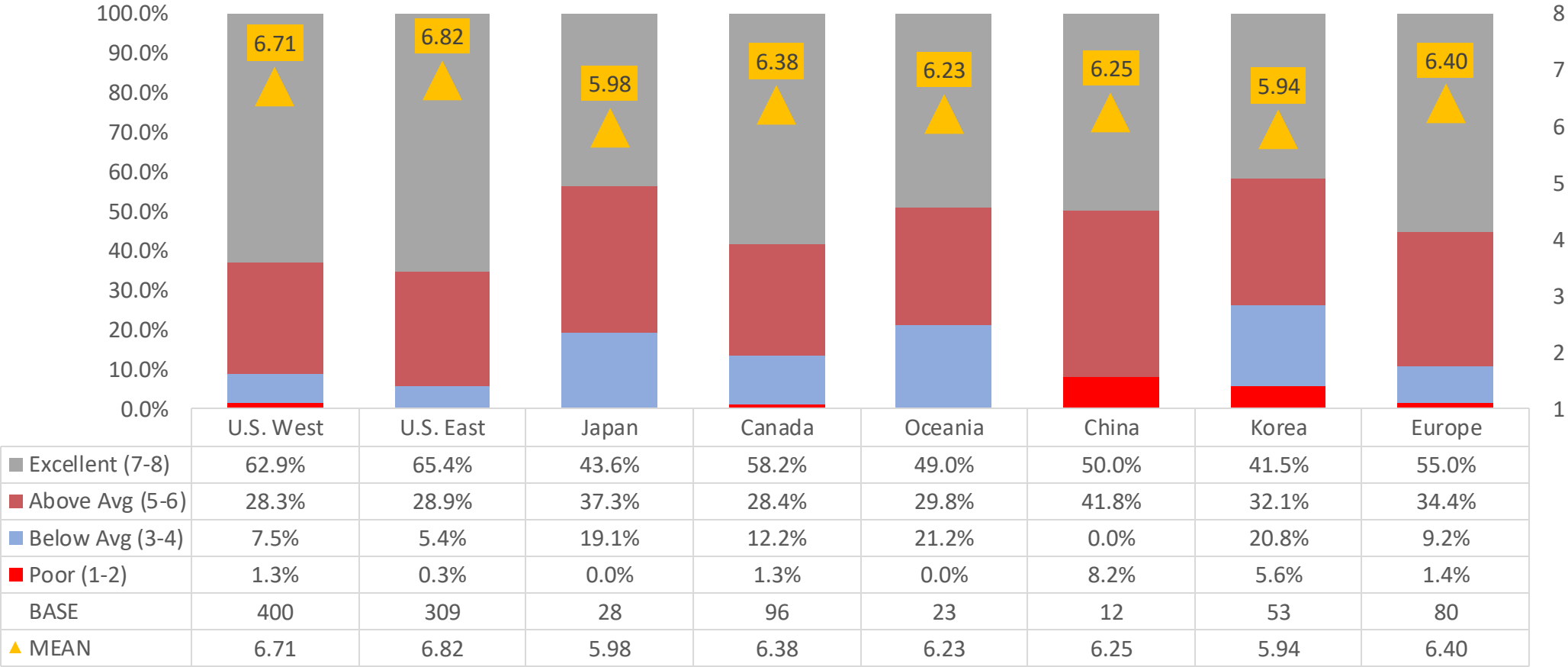
SHOPPING - ISLAND OF HAWAI‘I

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



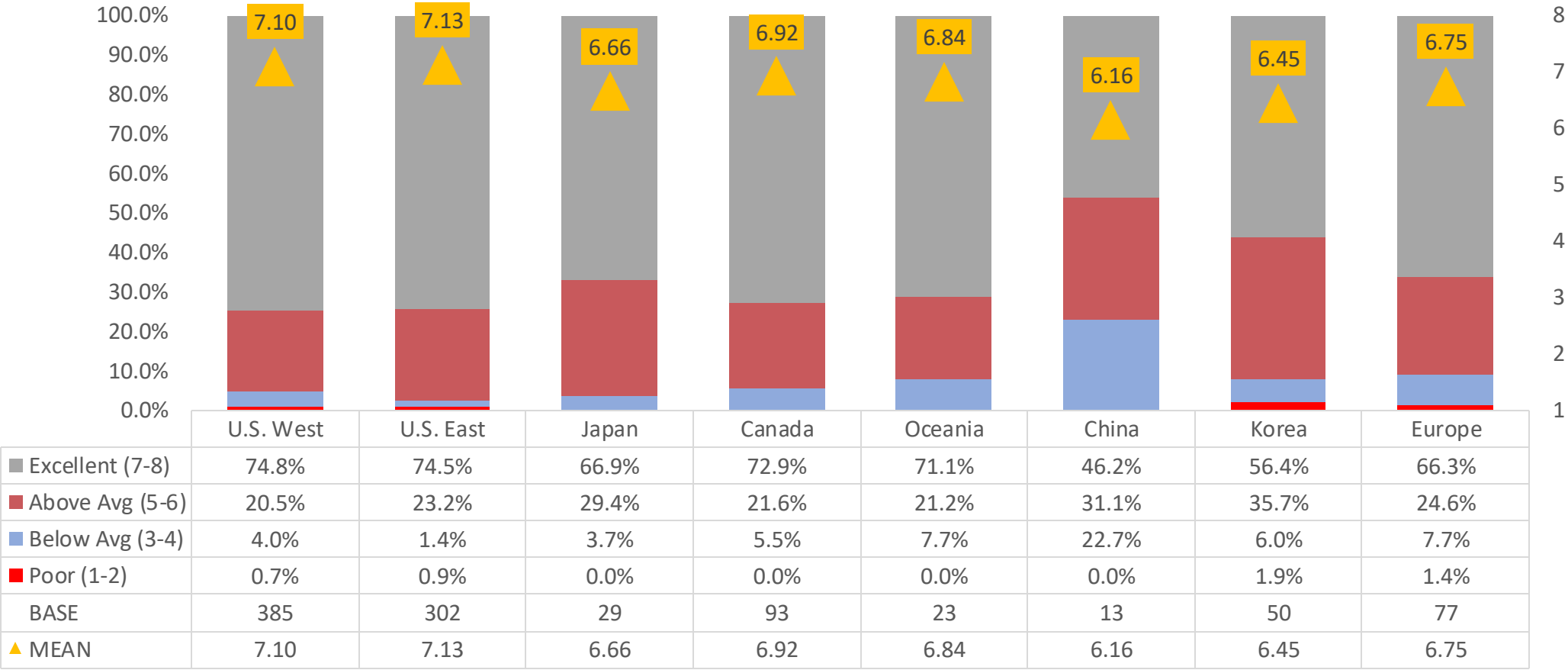
DINING/ FOOD & BEVERAGE - ISLAND OF HAWAI‘I

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



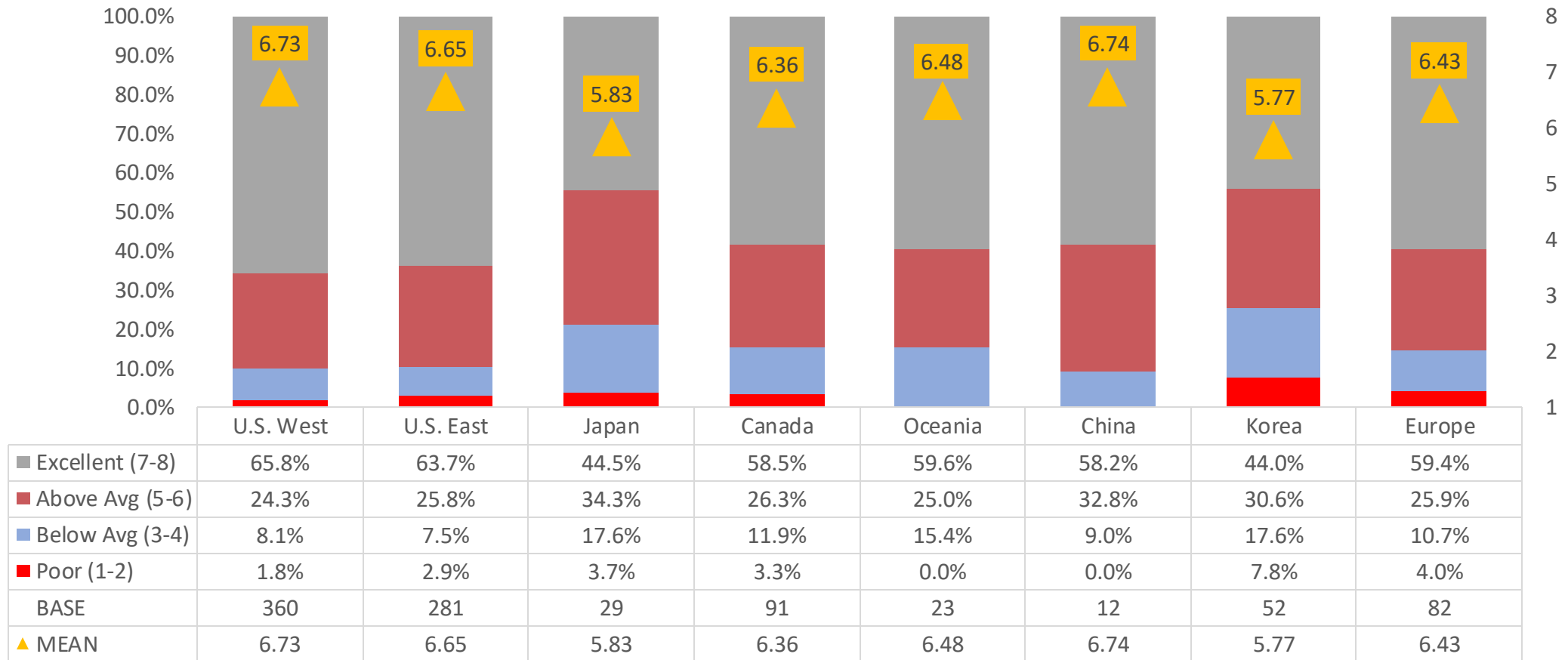
LODGING/ ACCOMMODATIONS - ISLAND OF HAWAI‘I

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



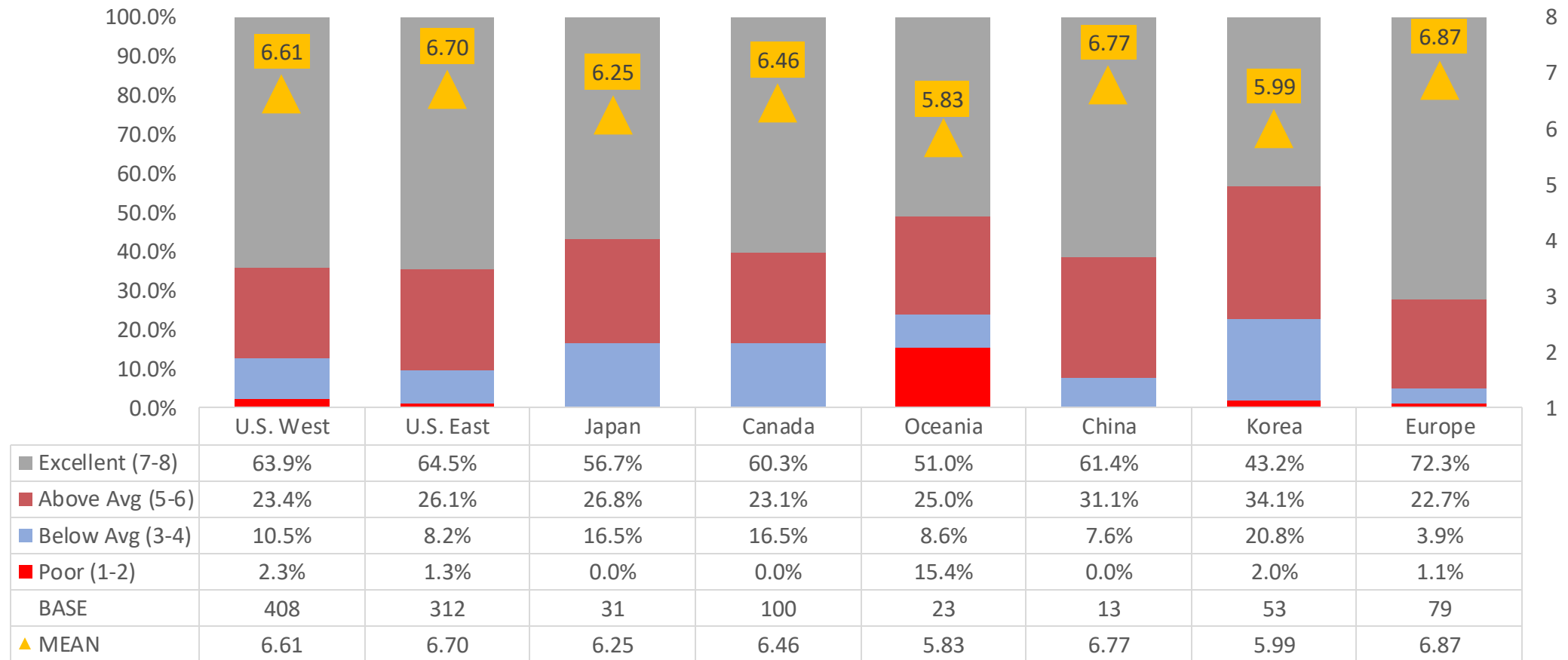
TRANSPORTATION ON ISLAND - ISLAND OF HAWAI'I

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



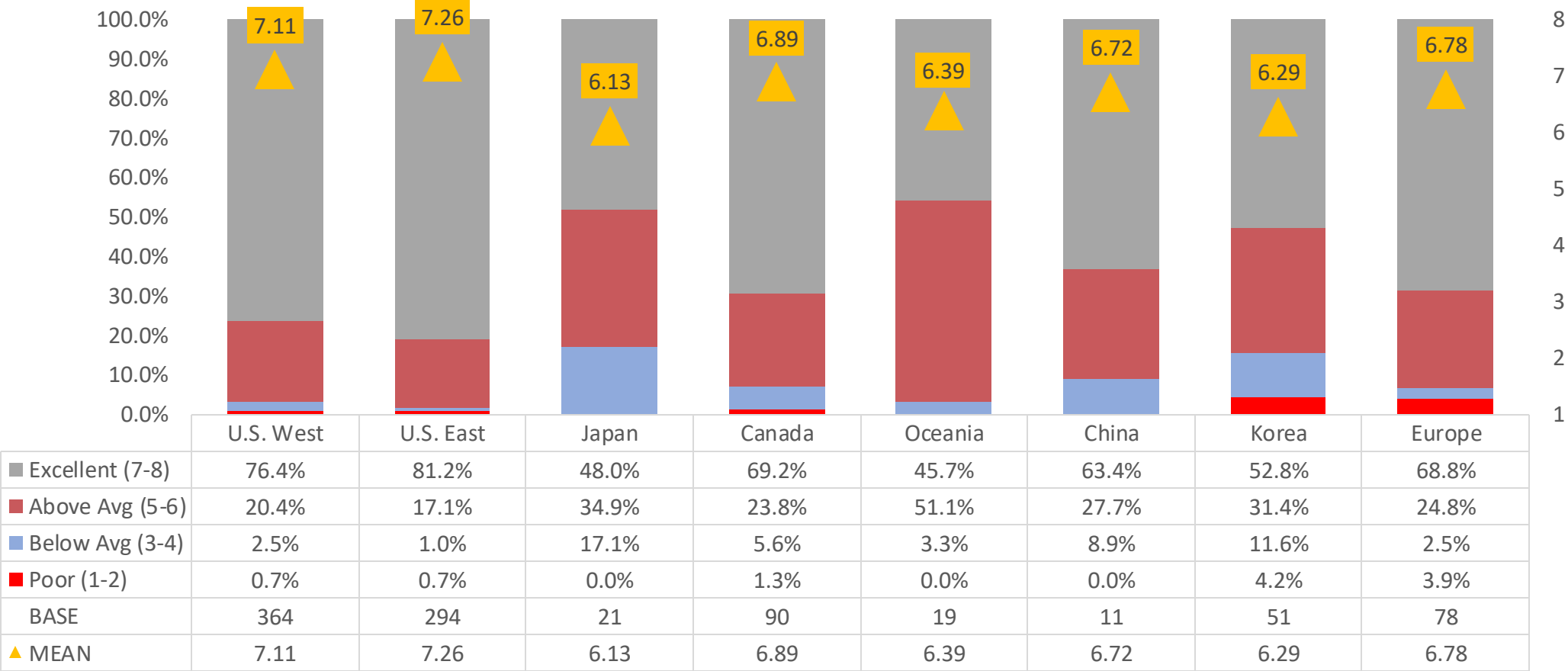
AIRPORT - ISLAND OF HAWAI'I

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



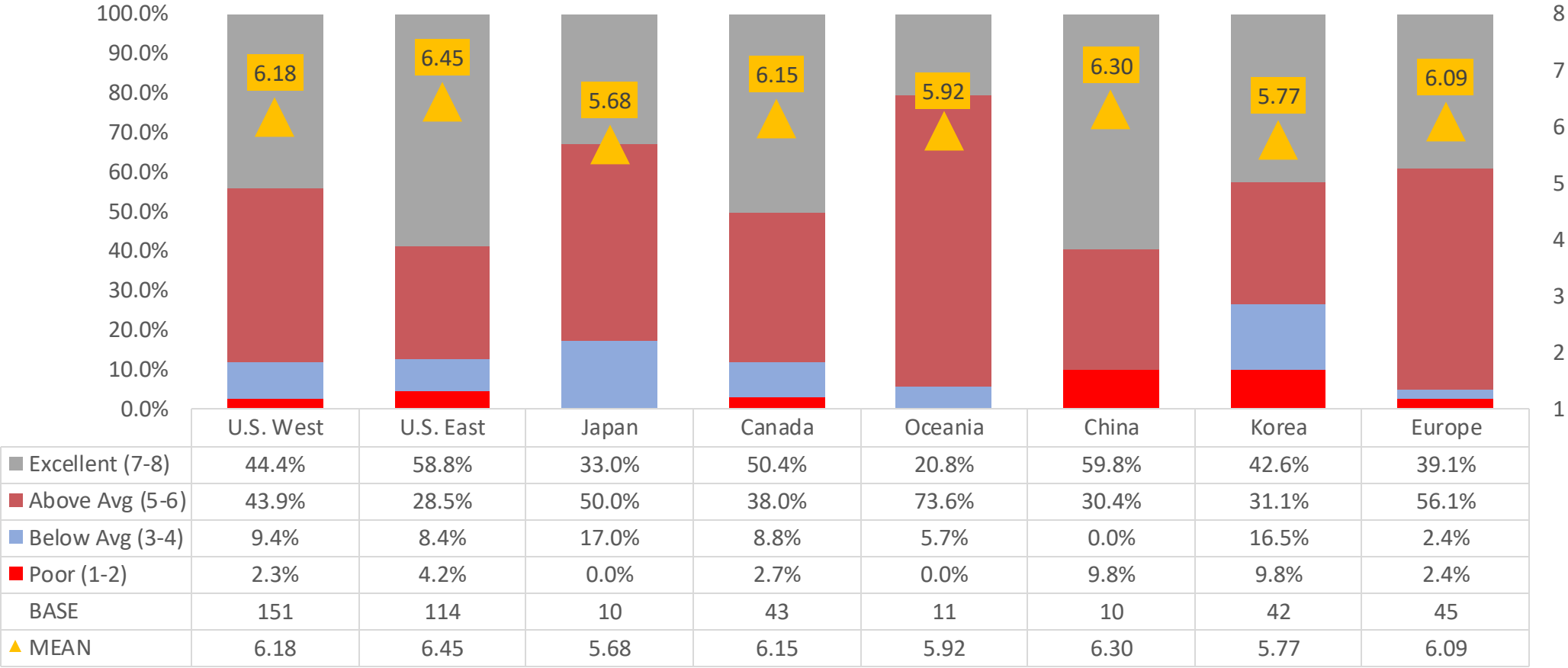
CULTURAL EXPERIENCES ON ISLAND - ISLAND OF HAWAI‘I

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



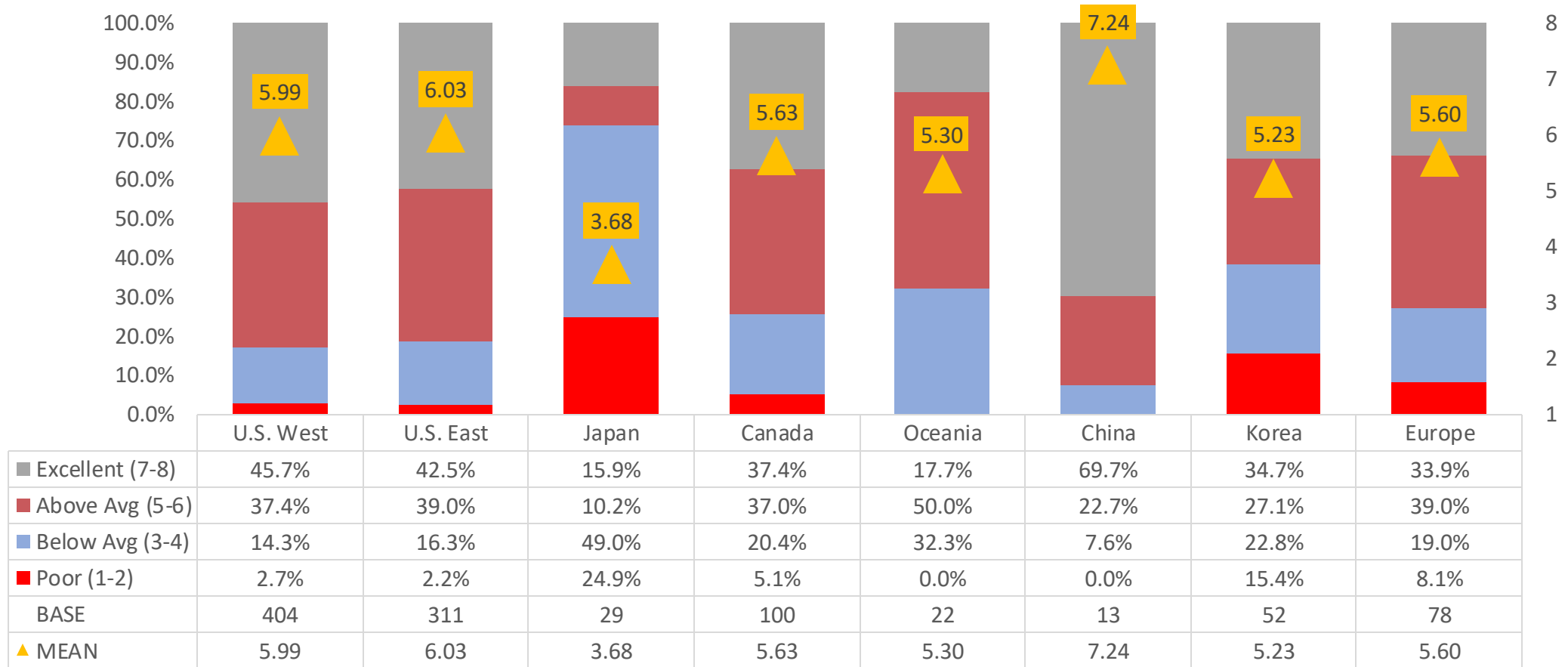
VOLUNTEER EXPERIENCES ON ISLAND - ISLAND OF HAWAI'I

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



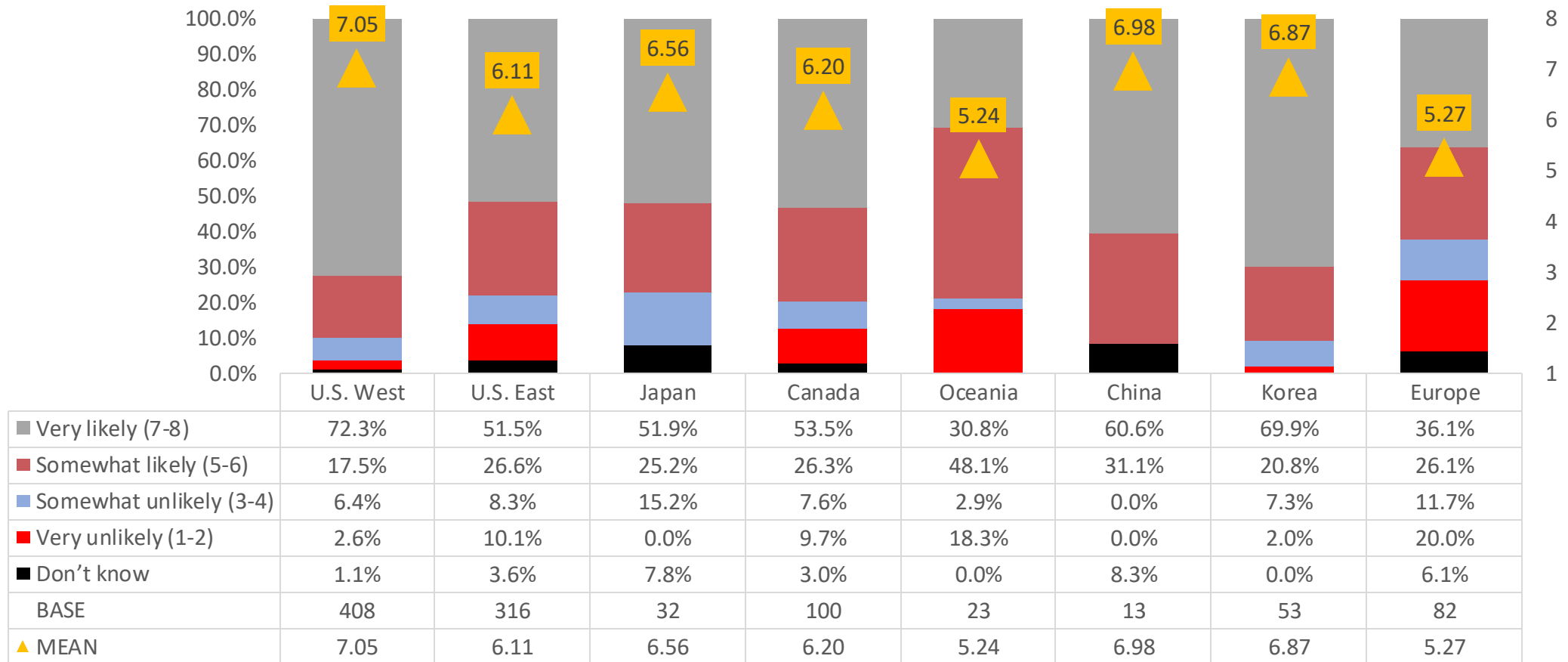
VALUE FOR THE MONEY ON ISLAND - ISLAND OF HAWAI'I

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



LIKELIHOOD OF RETURN VISIT - ISLAND OF HAWAI'I

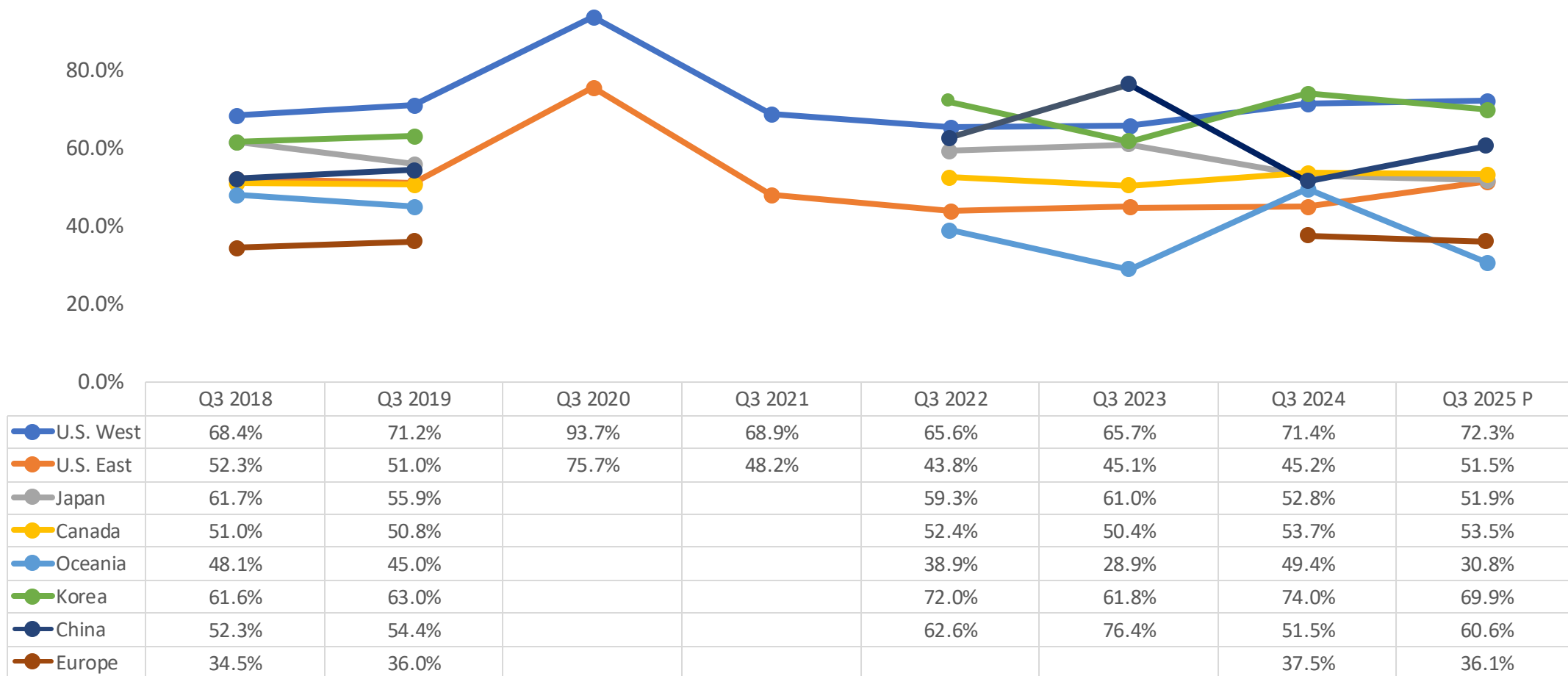
8-pt Rating Scale
8=Very likely/ 1=Very unlikely



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%



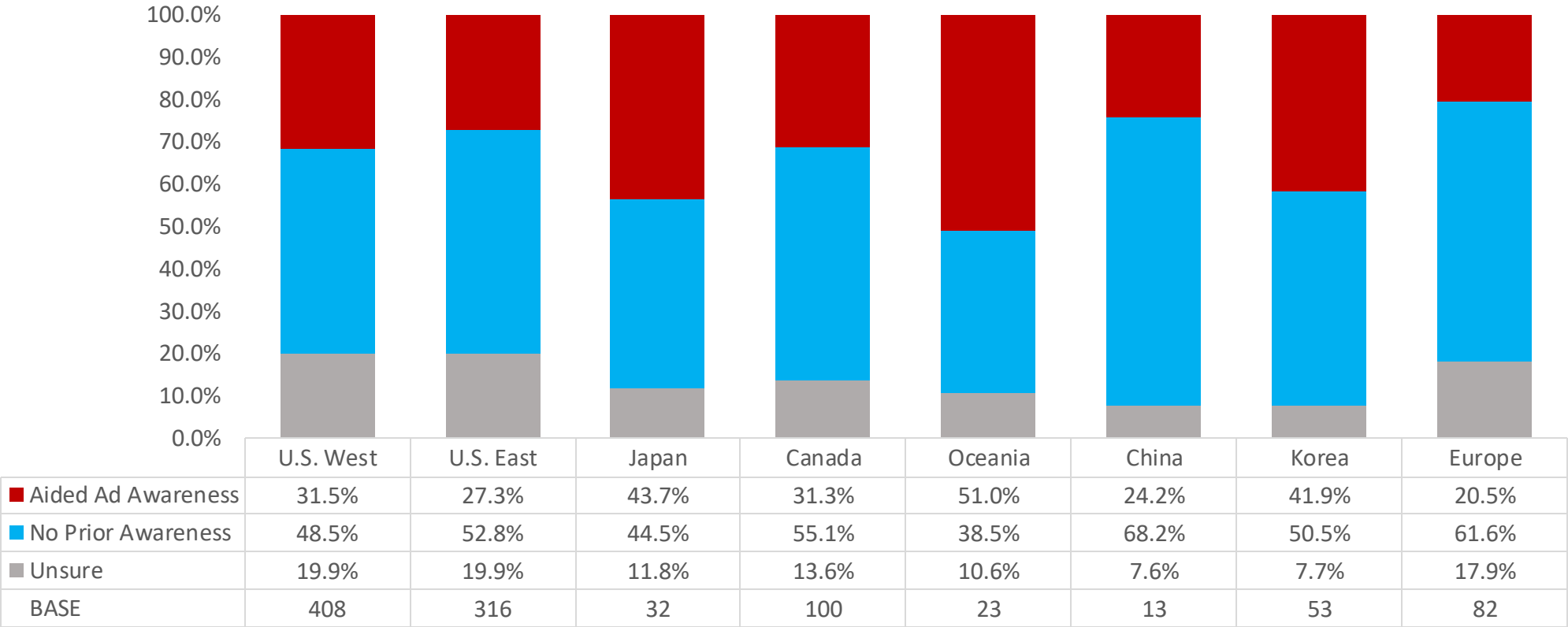
P= Preliminary Data

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.



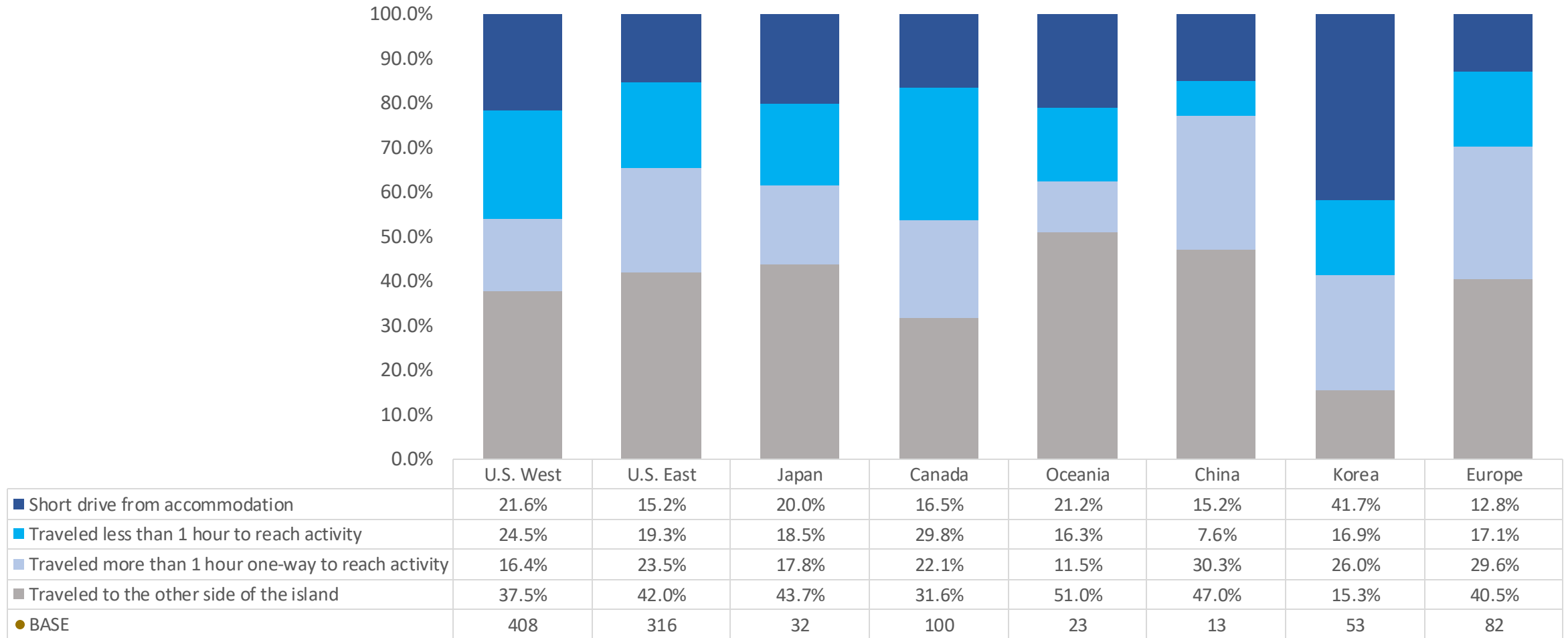
AIDED ADVERTISING AWARENESS - ISLAND OF HAWAI‘I



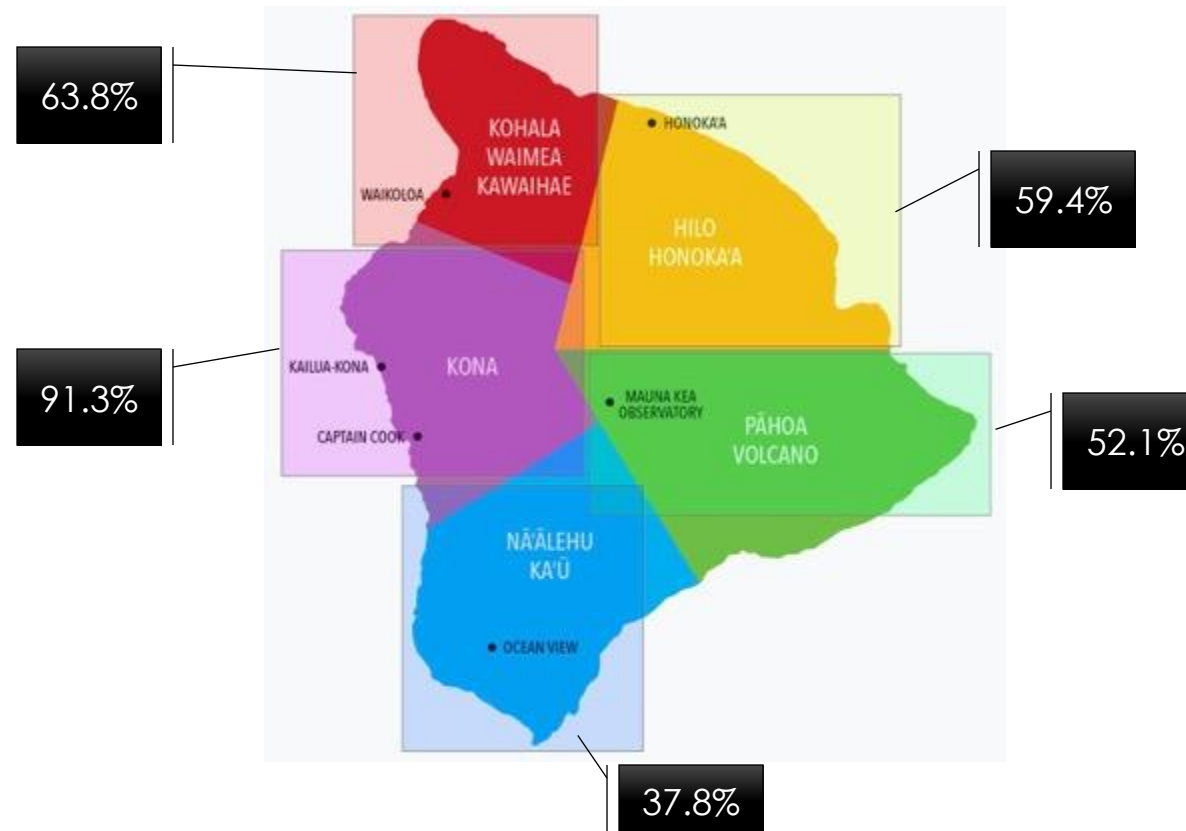
MOTIVATING FACTORS – ISLAND OF HAWAI‘I

	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

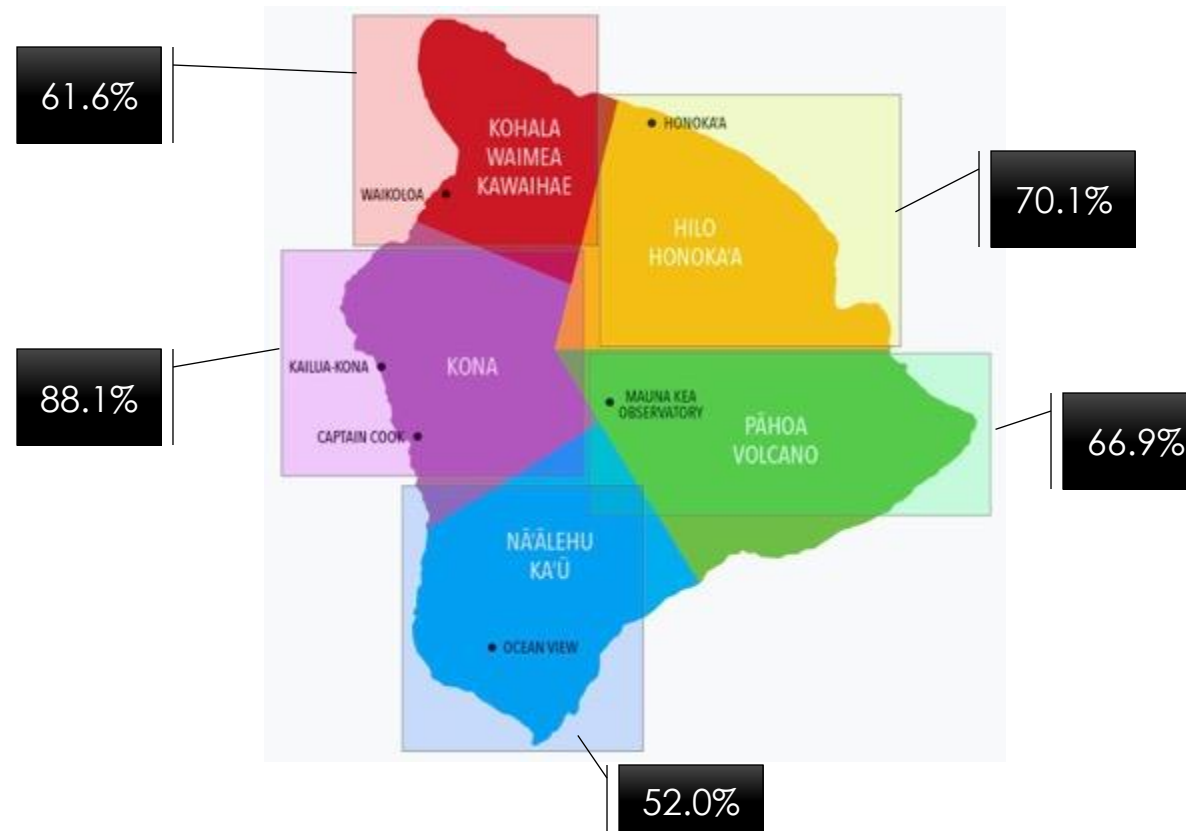
TRAVEL ON ISLAND OF HAWAI'I



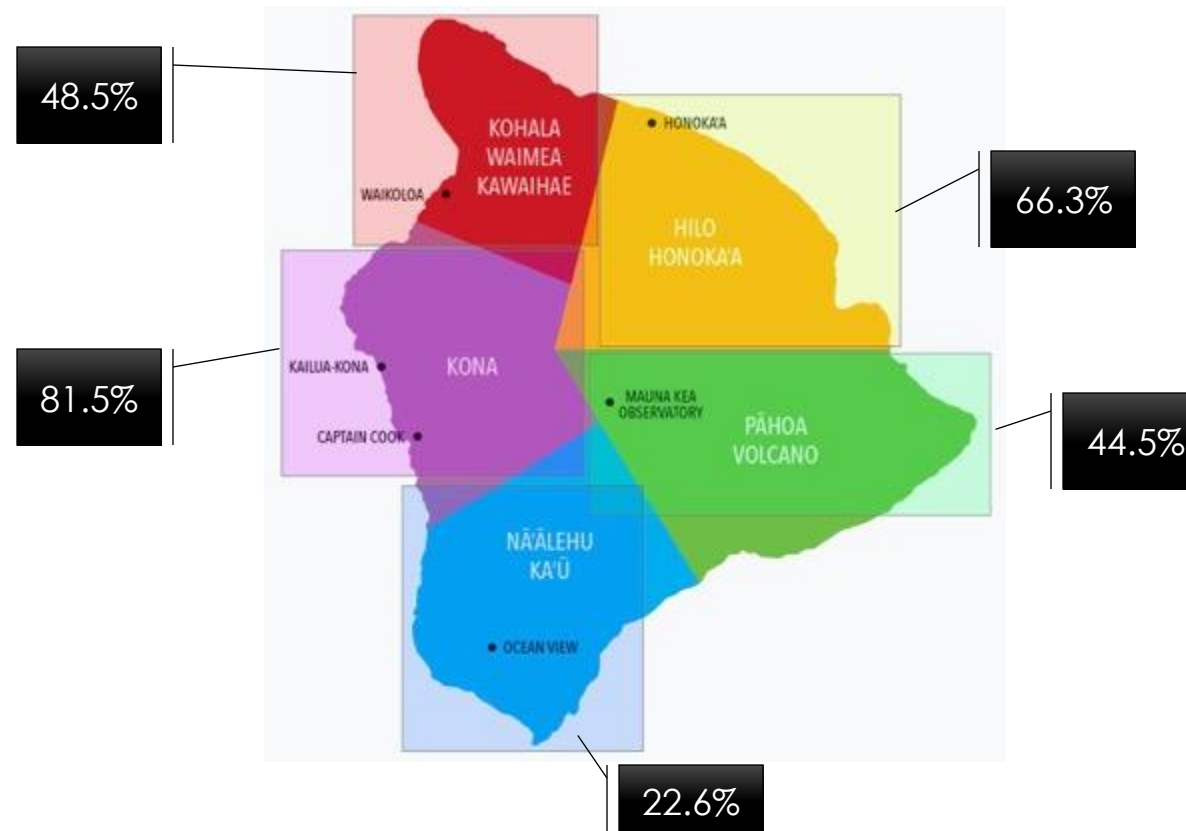
AREAS VISITED - ISLAND OF HAWAI'I U.S. WEST



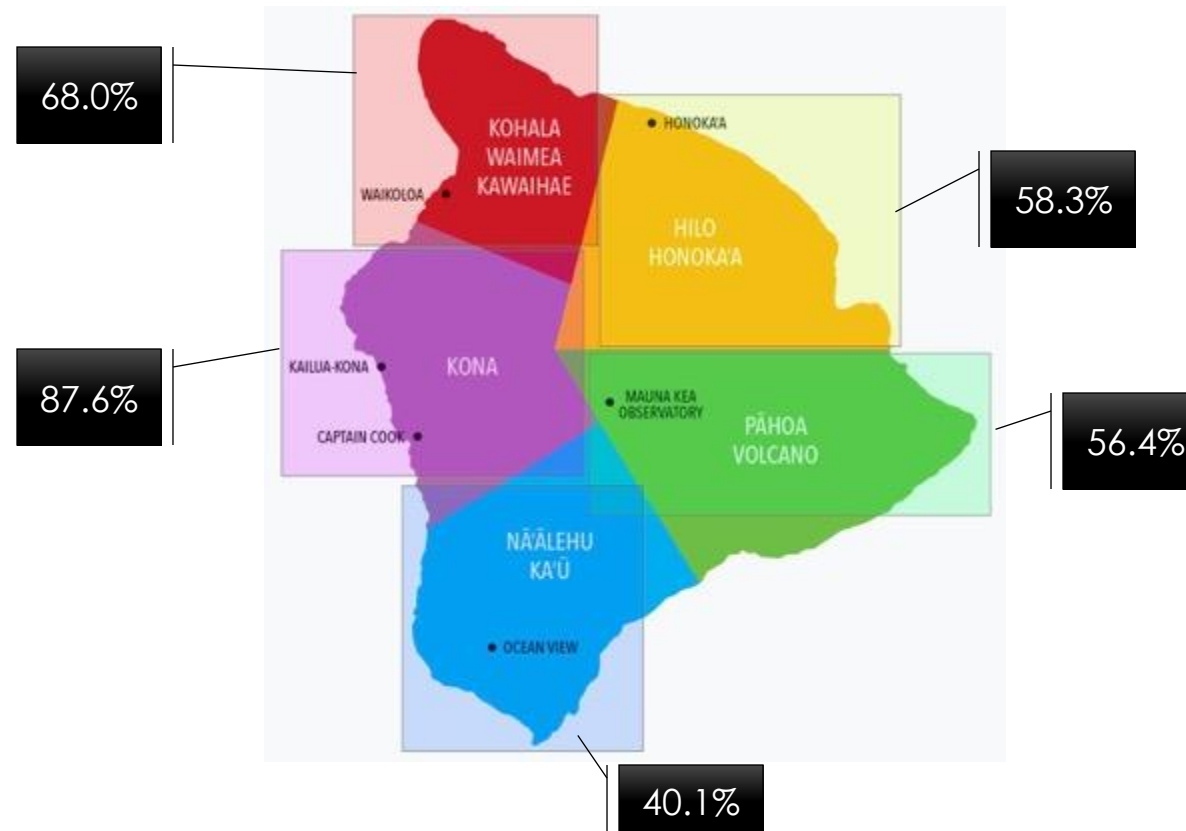
AREAS VISITED - ISLAND OF HAWAI'I U.S. EAST



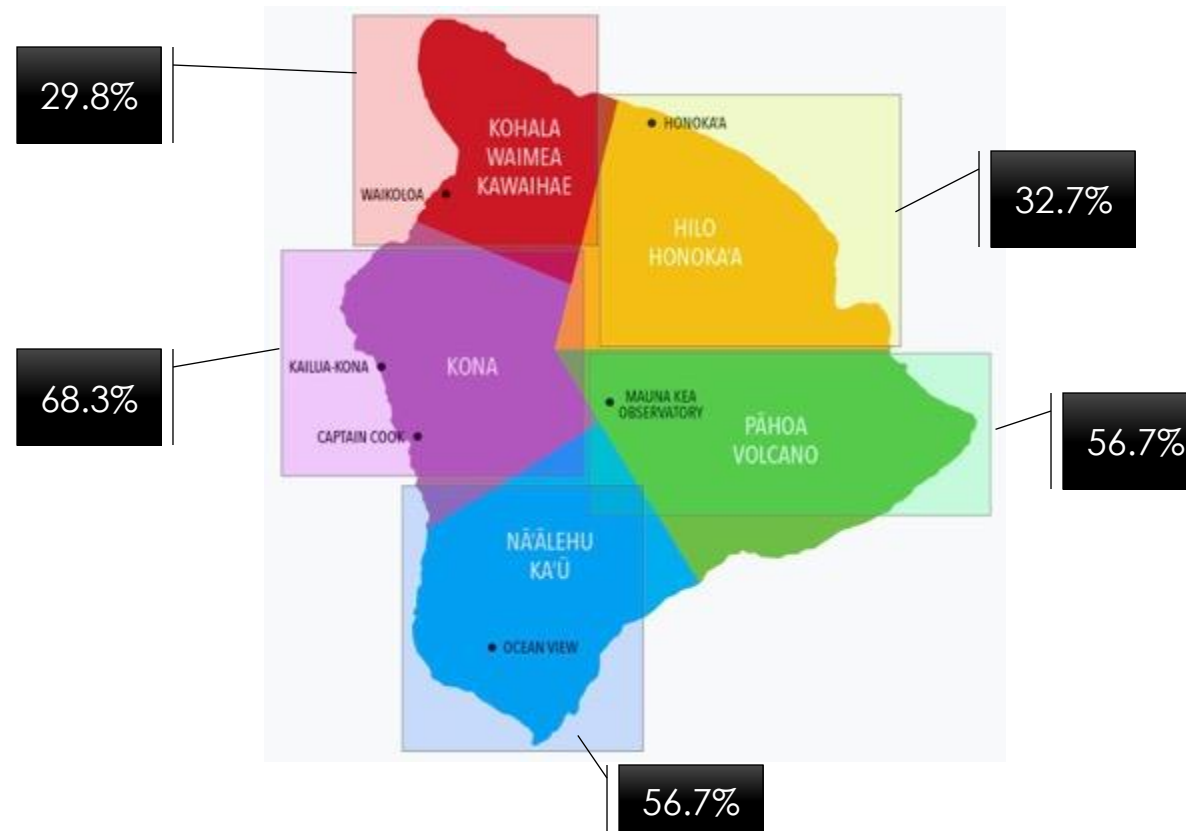
AREAS VISITED - ISLAND OF HAWAI'I JAPAN



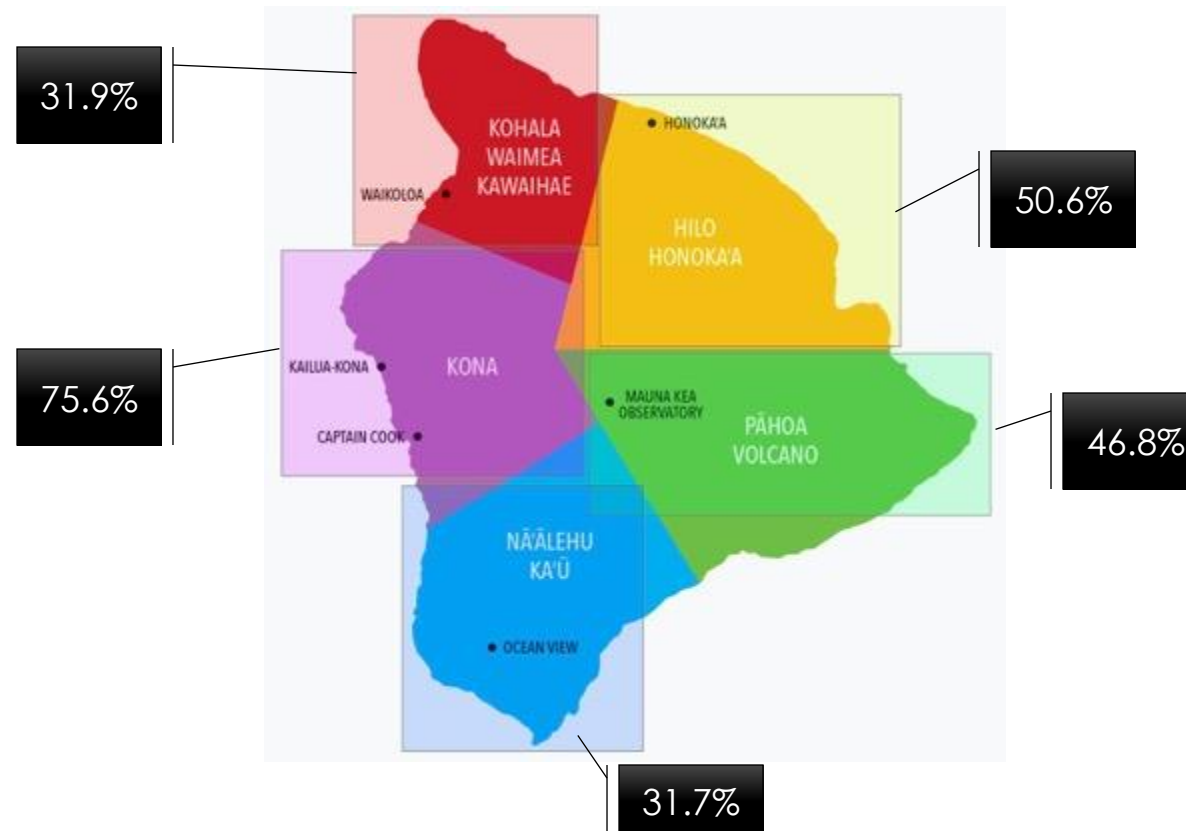
AREAS VISITED - ISLAND OF HAWAI'I CANADA



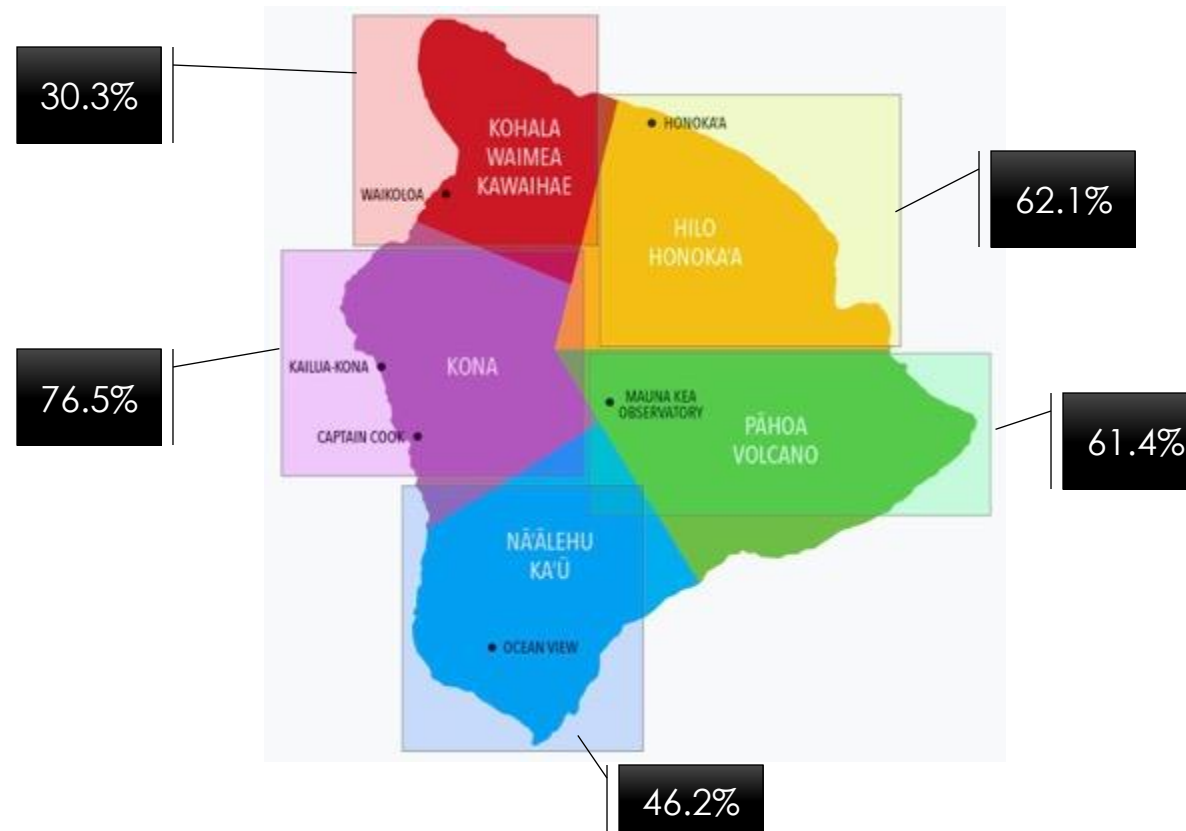
AREAS VISITED - ISLAND OF HAWAI'I OCEANIA



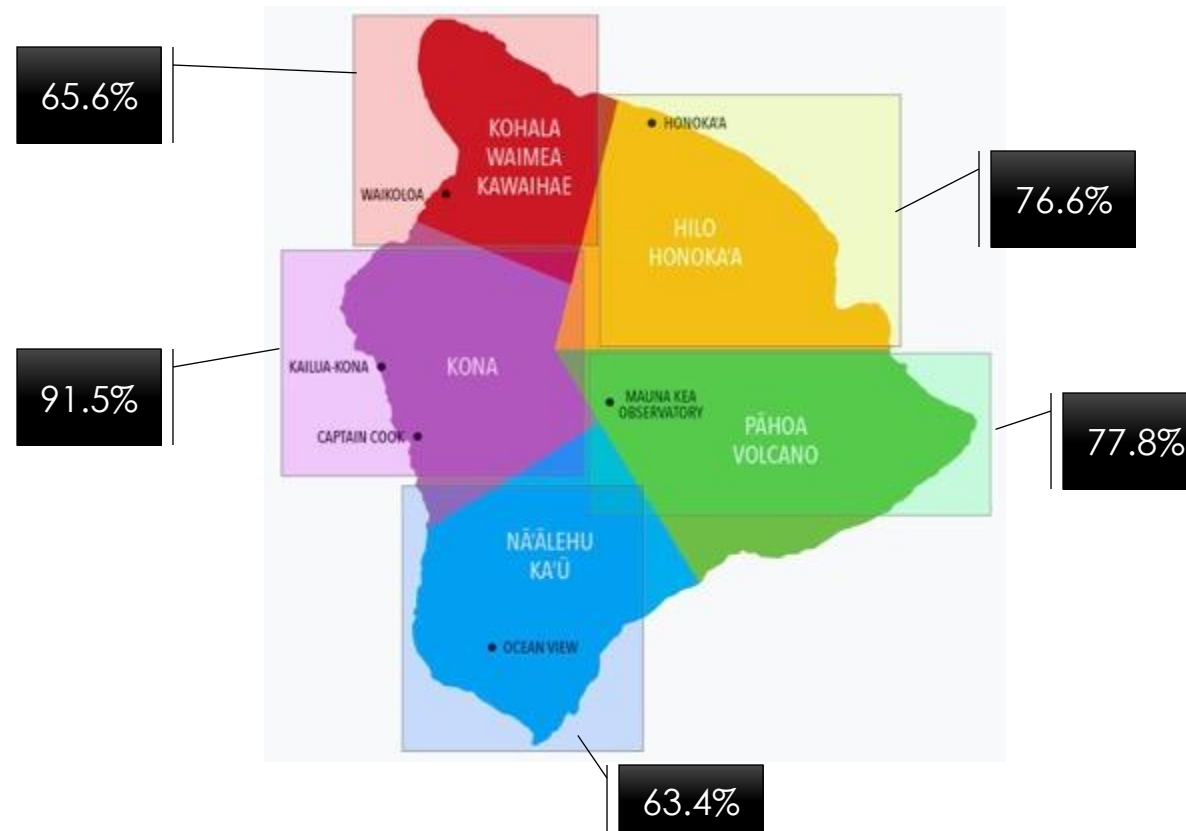
AREAS VISITED - ISLAND OF HAWAI'I KOREA



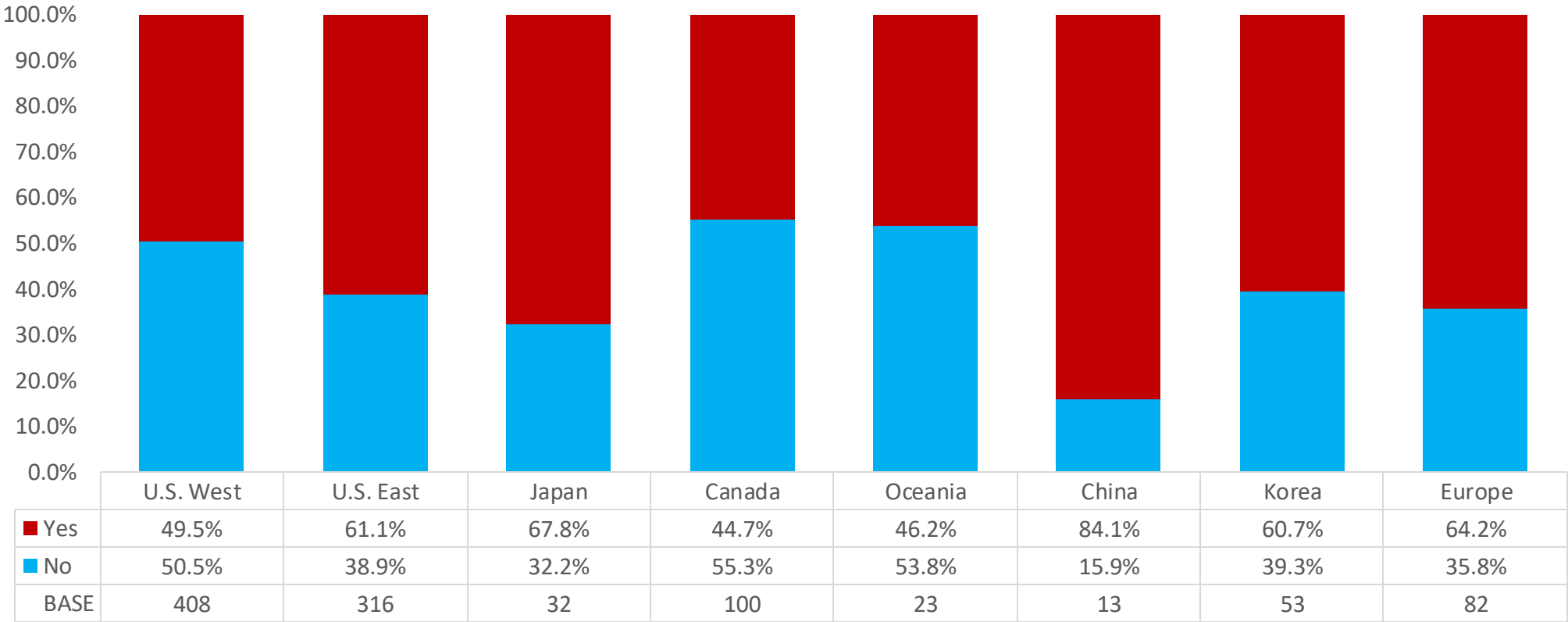
AREAS VISITED - ISLAND OF HAWAI'I CHINA



AREAS VISITED - ISLAND OF HAWAI'I EUROPE

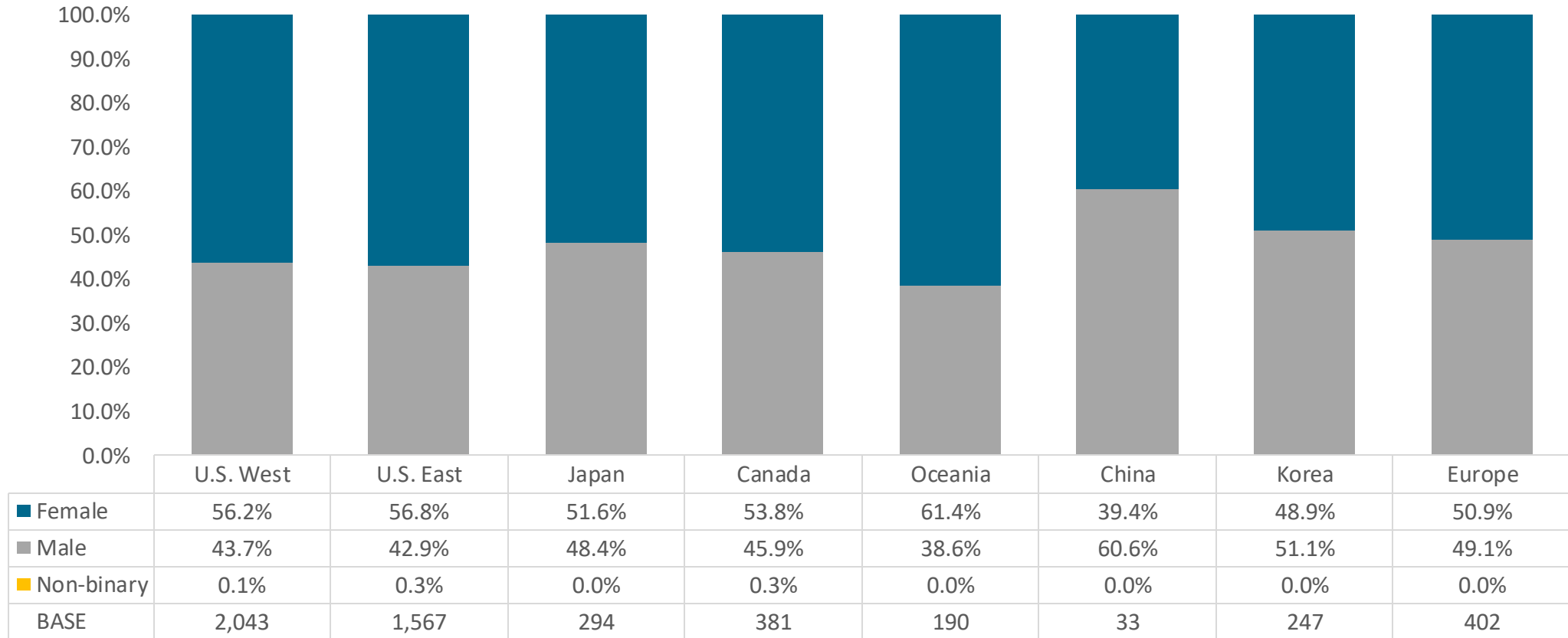


VOLCANIC ERUPTION MOTIVATOR - ISLAND OF HAWAI‘I

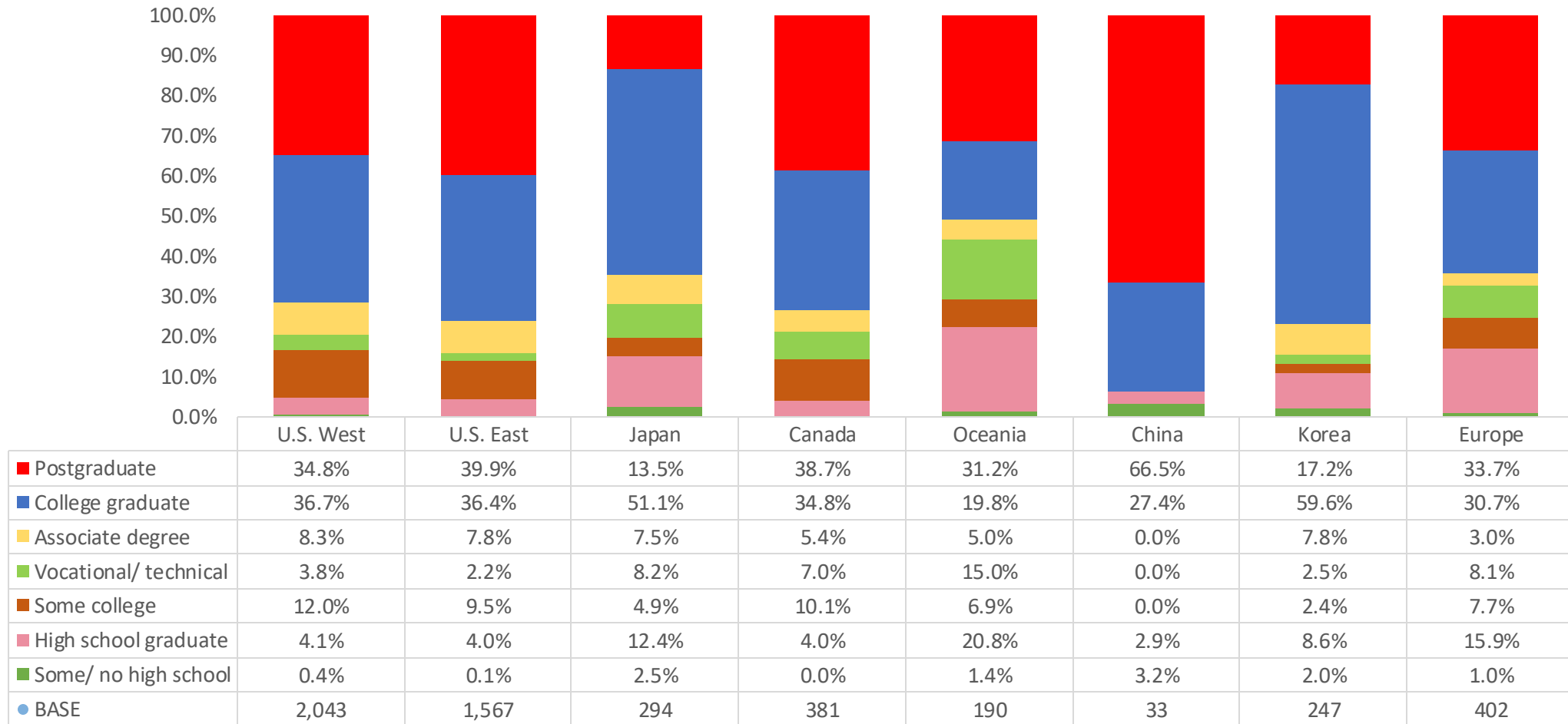


Section 11 – Visitor Profile

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

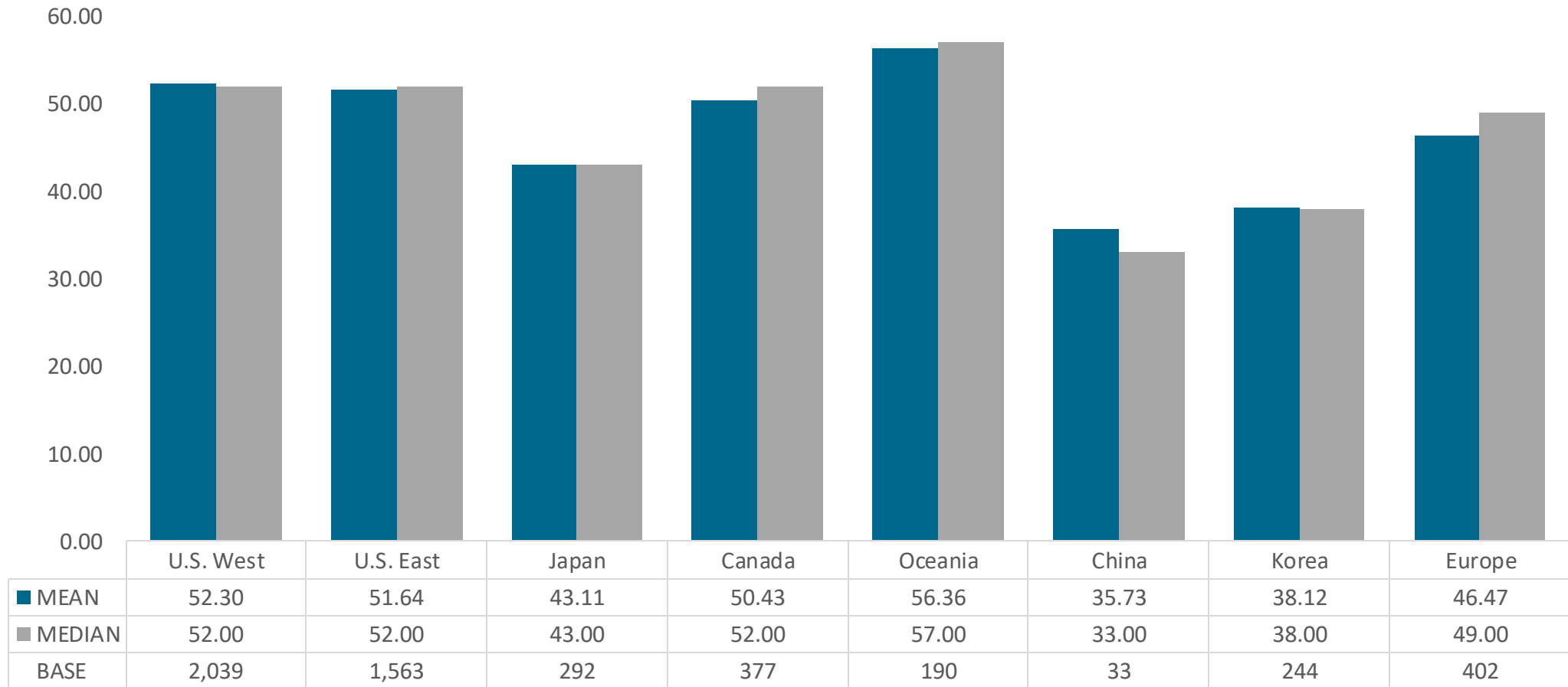
VISITOR PROFILE - HOUSEHOLD INCOME (Korean Won)

	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

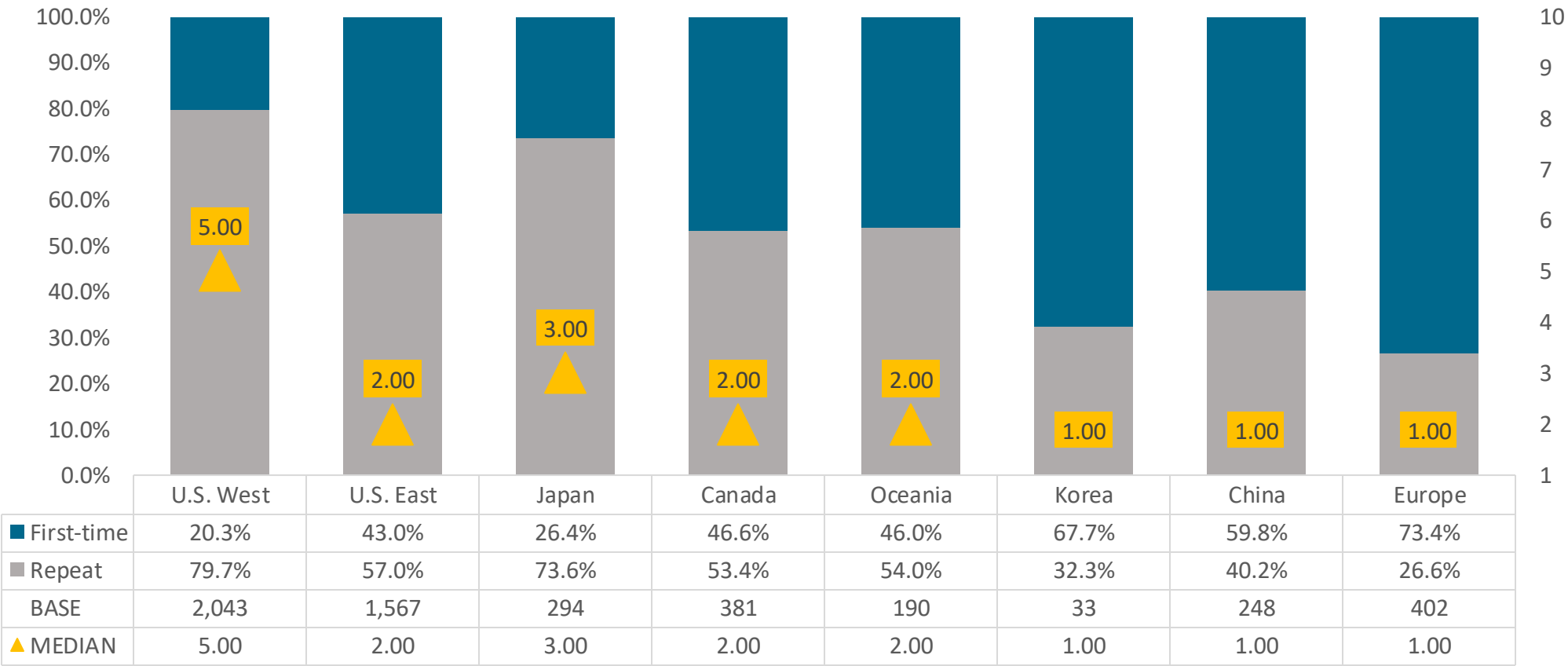
VISITOR PROFILE - HOUSEHOLD INCOME (Chinese Yuan)

	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

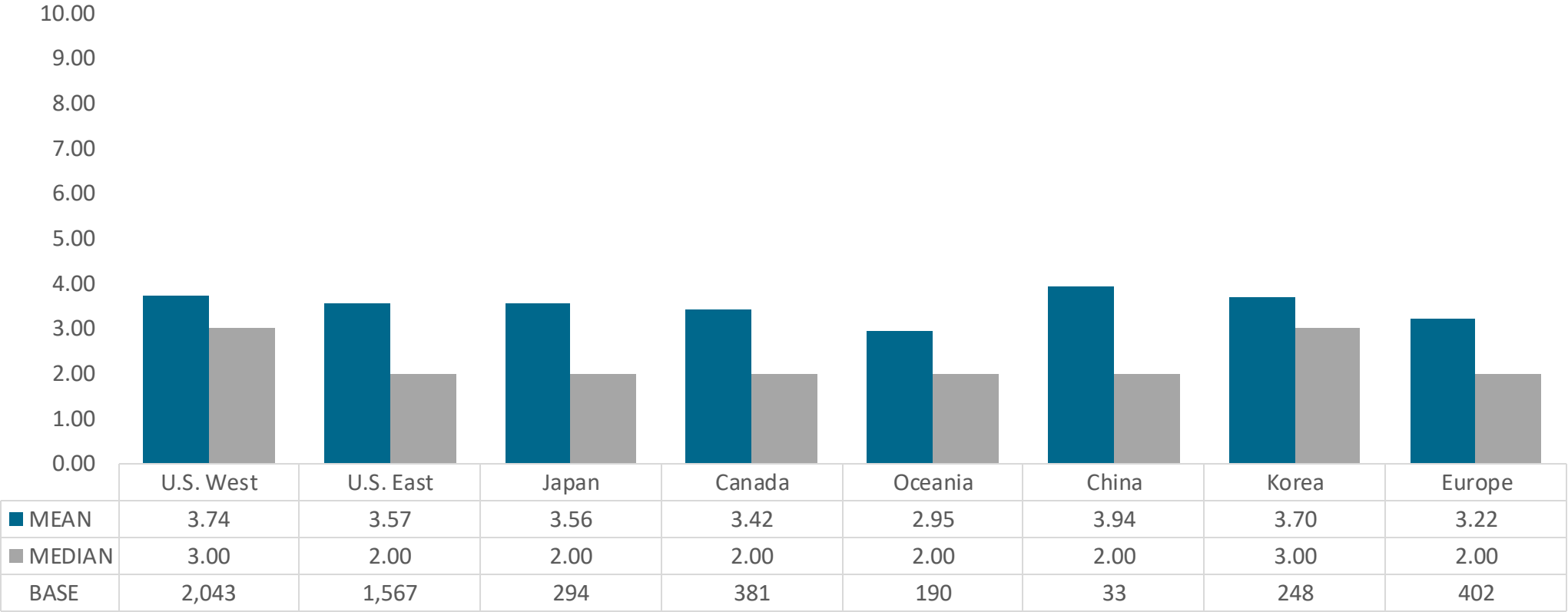
VISITOR PROFILE - AGE



VISITOR PROFILE - TRIPS TO HAWAI'I



VISITOR PROFILE - TRAVEL PARTY SIZE



VISITOR PROFILE - TRAVEL PARTY

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
My spouse	60.7%	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

