



Resident Sentiment and Visitor Satisfaction

September 22, 2025

Jennifer Chun

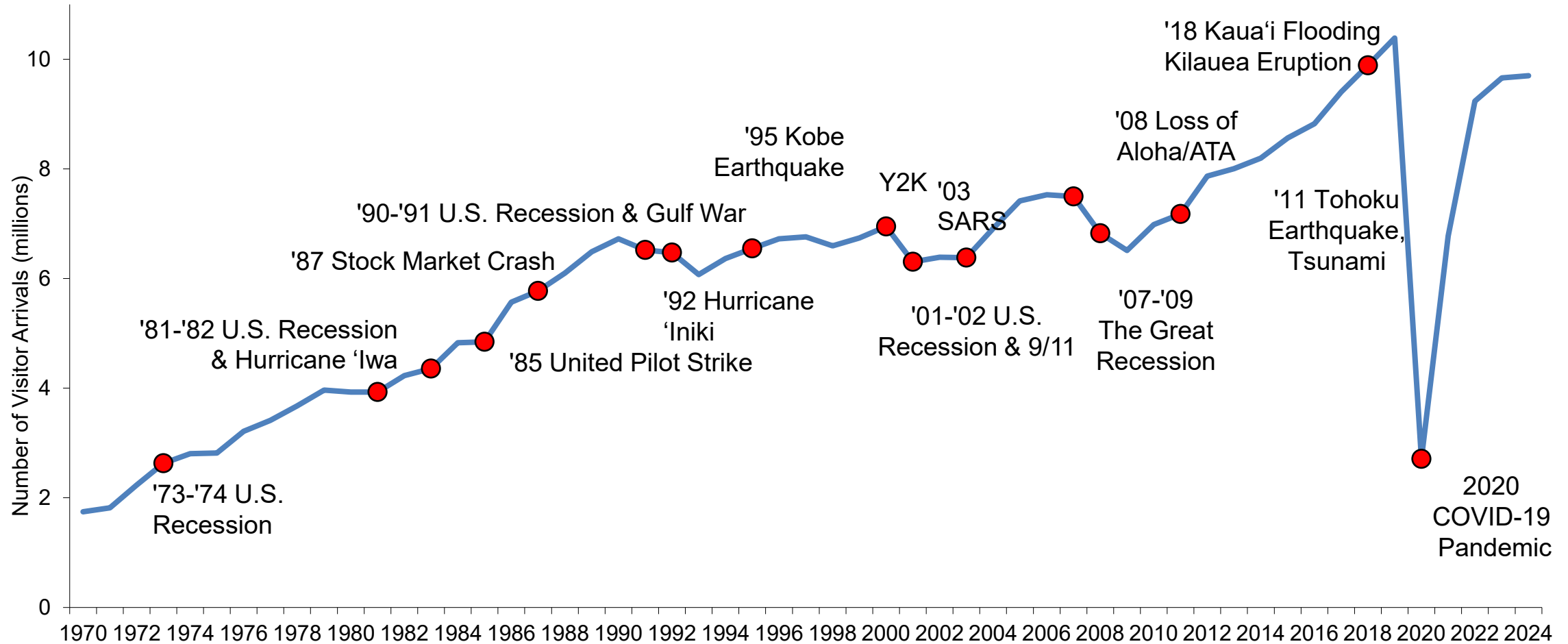
Director of Tourism Research



STATE OF HAWAII • DEPARTMENT OF BUSINESS,
ECONOMIC DEVELOPMENT & TOURISM

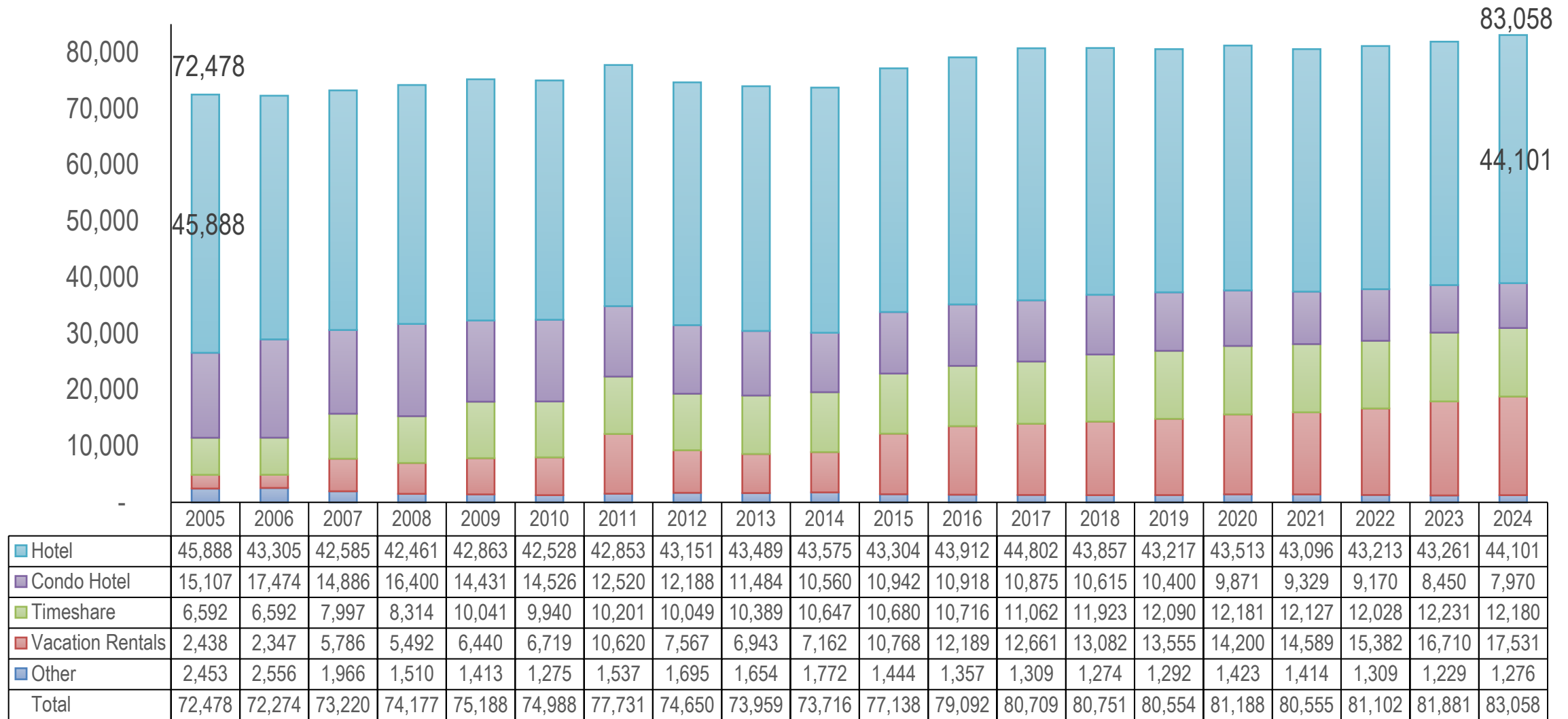
Historical Visitor Arrivals

Visitor Arrivals to the State of Hawai'i 1970 - 2024



Source: State of Hawai'i DBEDT

Visitor Unit Counts by Type of Accommodations



Source: State of Hawai'i DBEDT, Visitor Plant Inventory

Other “Game Changers”

- 2004 – Facebook
- 2005 – YouTube
- 2006 – Twitter, VRBO acquired by HomeAway
- 2007 – Airbnb
- 2008 – Aloha Airlines and ATA
- 2010 – Instagram
- 2015 – HomeAway acquired by Expedia
- 2016 – TikTok
- 2019 – Southwest Airlines

Source: the Interwebs



Resident Sentiment Survey – Spring 2025



State of Hawai'i Department of Business, Economic Development & Tourism
July 2025 (Fielded: March 3 through June 1, 2025)



Methodology

Sample Plan

Omnitrak used a region-based stratified sampling for the study, the same approach used in earlier Resident Sentiment Survey efforts conducted by Omnitrak. The sampling plan divided the State into 12 sub-regions with consideration to population proportion, and allocated sufficient sample for each area to achieve an acceptable sampling error. Within each region, data was collected randomly. The resulting sample of residents was weighted proportionately to population distribution per the latest State Census from the State Department of Business, Economic Development & Tourism.

Statewide sampling produced a total of n = 1918 respondents as follows:

- O'ahu: 810
- Hawai'i Island: 453
- Maui Island: 324, Moloka'i: 36, Lāna'i: 15
- Kaua'i: 280

Methodology

- A mixed methodology was used for this survey, including a combination of Computer Assisted Telephone Interview (CATI, 25%) and online surveys (75%).
- All calls were placed from Omnitrak's continuously quality-controlled calling center in the Pioneer Plaza building in Downtown Honolulu.
- Field Dates: March 3 through June 1, 2025

In Summary

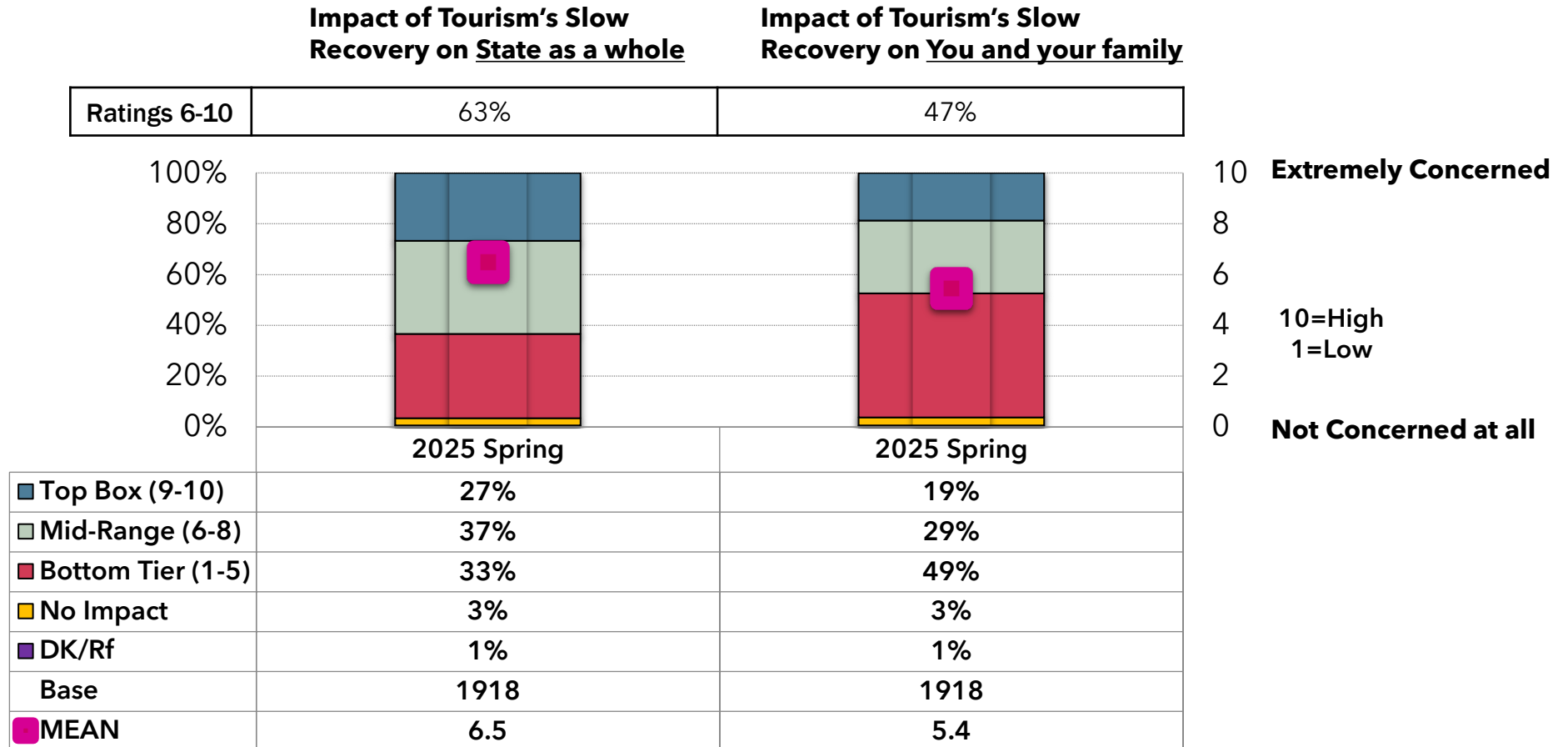
*H*awai'i's slow pace of tourism recovery is a concern, and residents see efforts to manage tourism gaining ground.

*K*ey measures of resident sentiment have improved.

*W*hile key indicators have improved, resident sentiment recovery remains fragile.

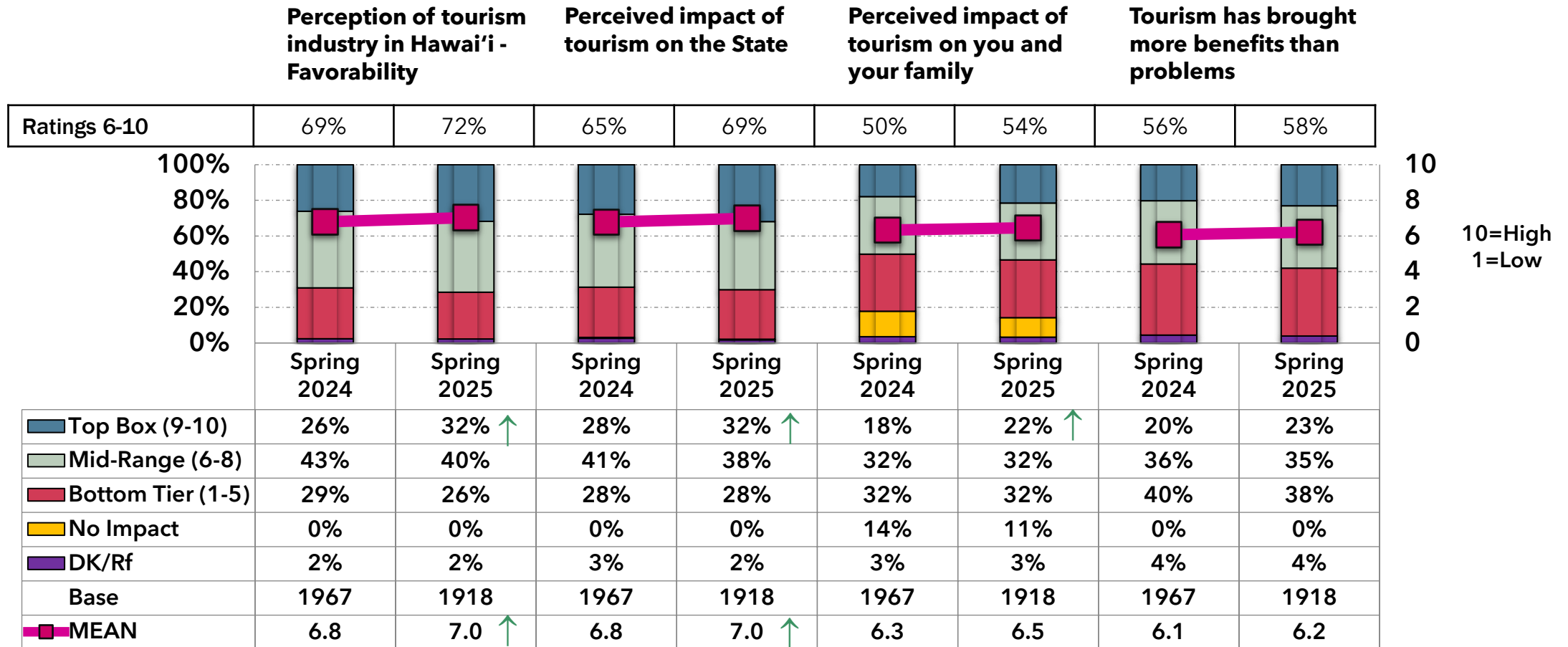


Impact of Tourism' Slow Recovery



Q13. Hawai'i's tourism industry continues to be challenged by the impacts of the Lahaina Wildfires, a slow recovery in visitors from Japan, South Korea, Australia and New Zealand, and by worldwide economic and political problems. For the year ahead, how concerned are you with the impact of tourism's slow recovery on?

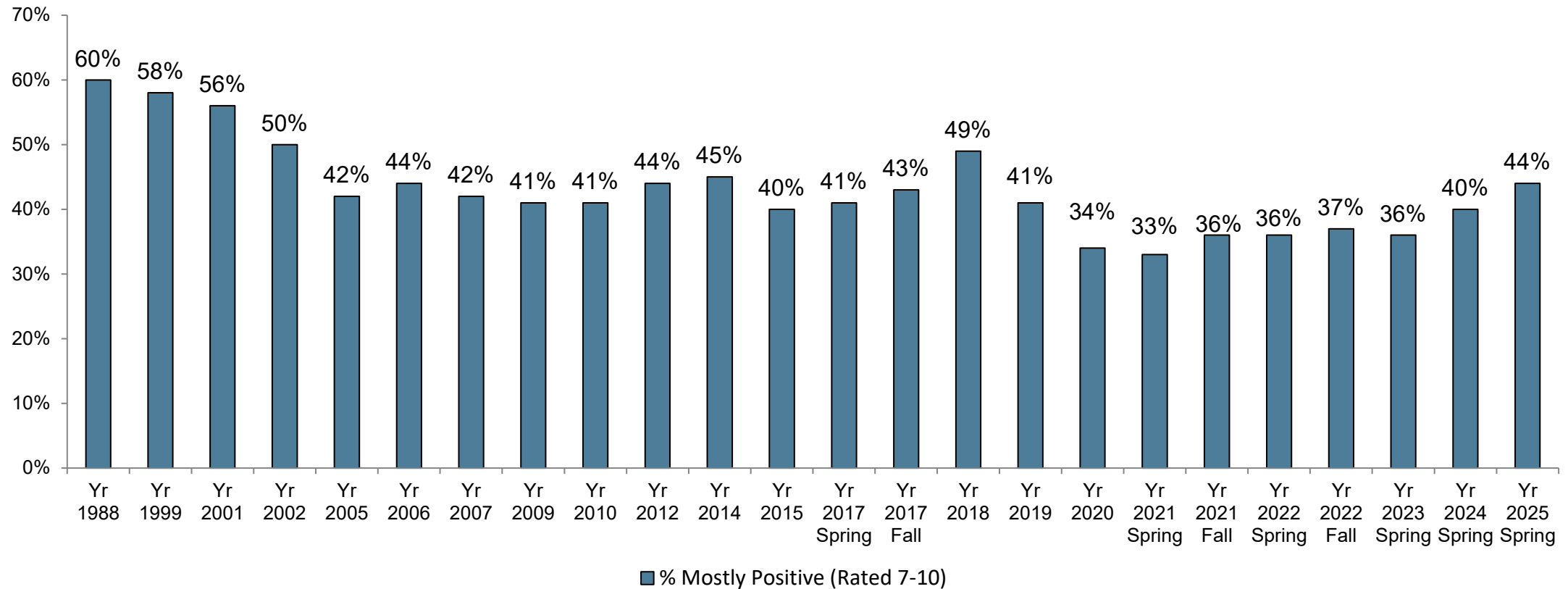
Key Resident Sentiment Indicators



Q1. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable at All, please give me your opinion of tourism as an industry in Hawai'i.

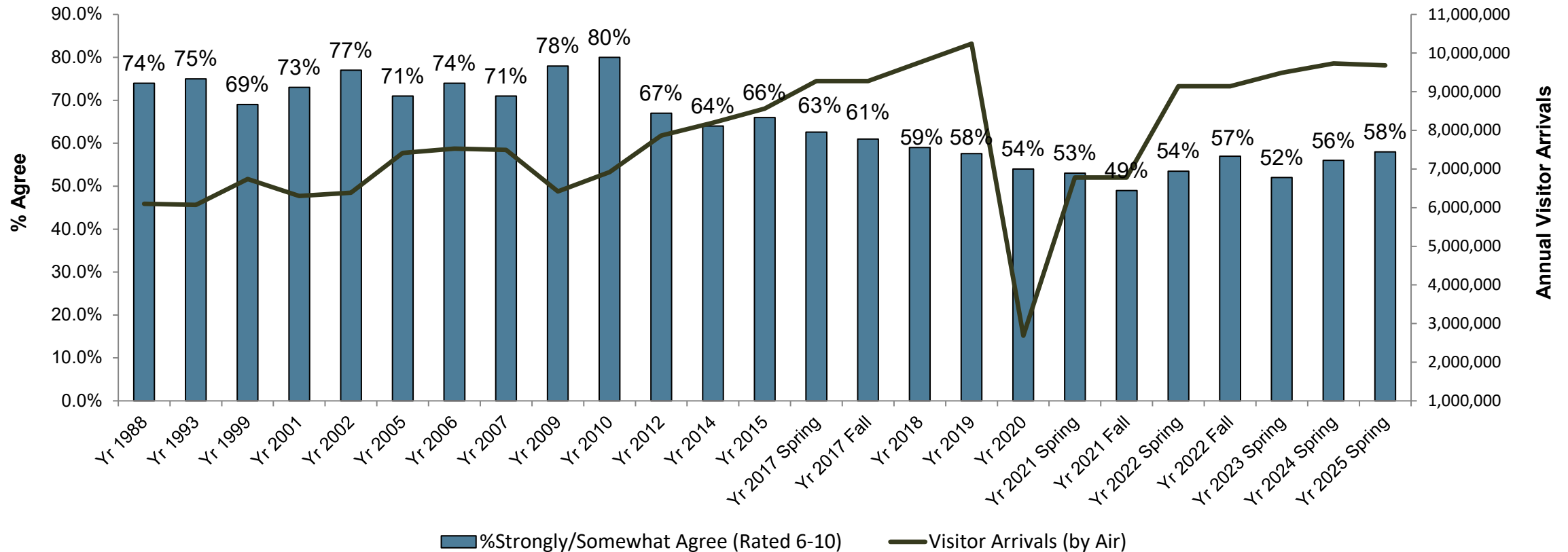
Q2a/b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...The State as a whole/You and Your Family?

Impact of Tourism on You and Your Family



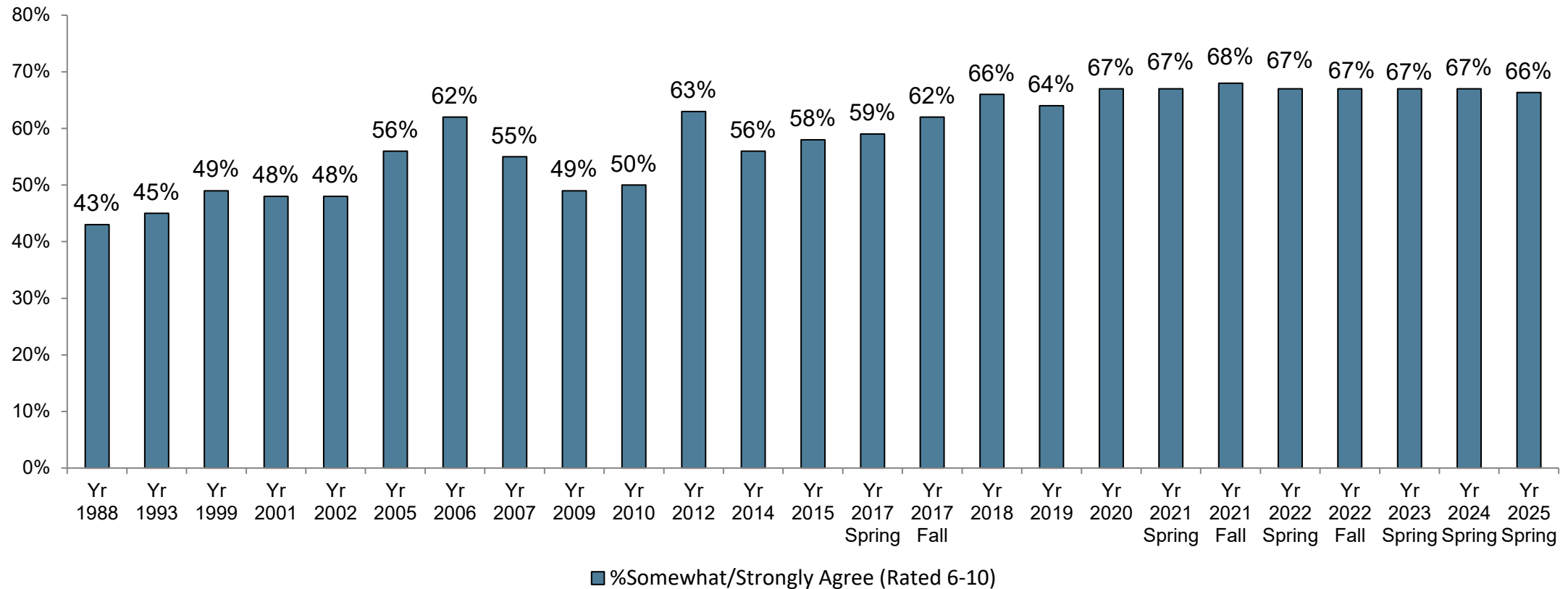
Q2b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...you and your family?

"Tourism has brought more benefits than problems"



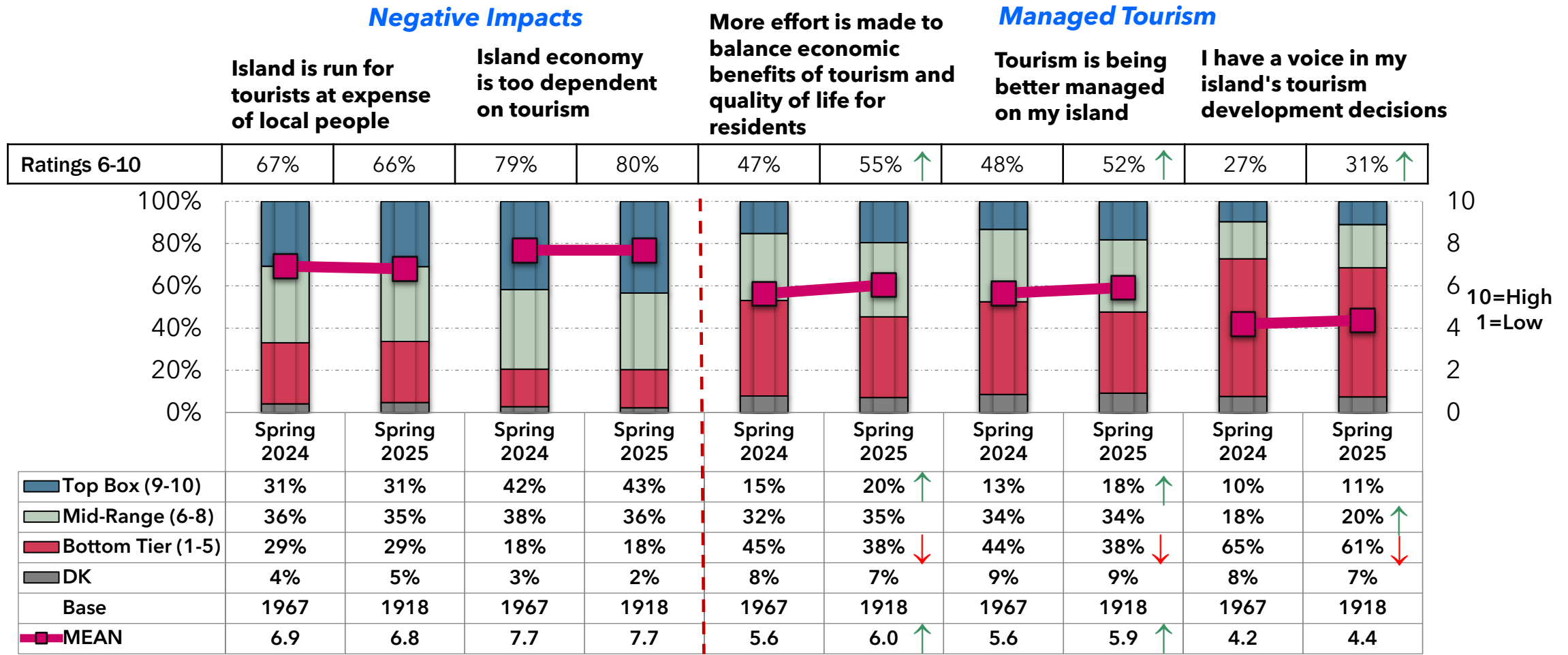
Q.4. How much do you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All.

"This island is being run for tourists at the expense of local people"



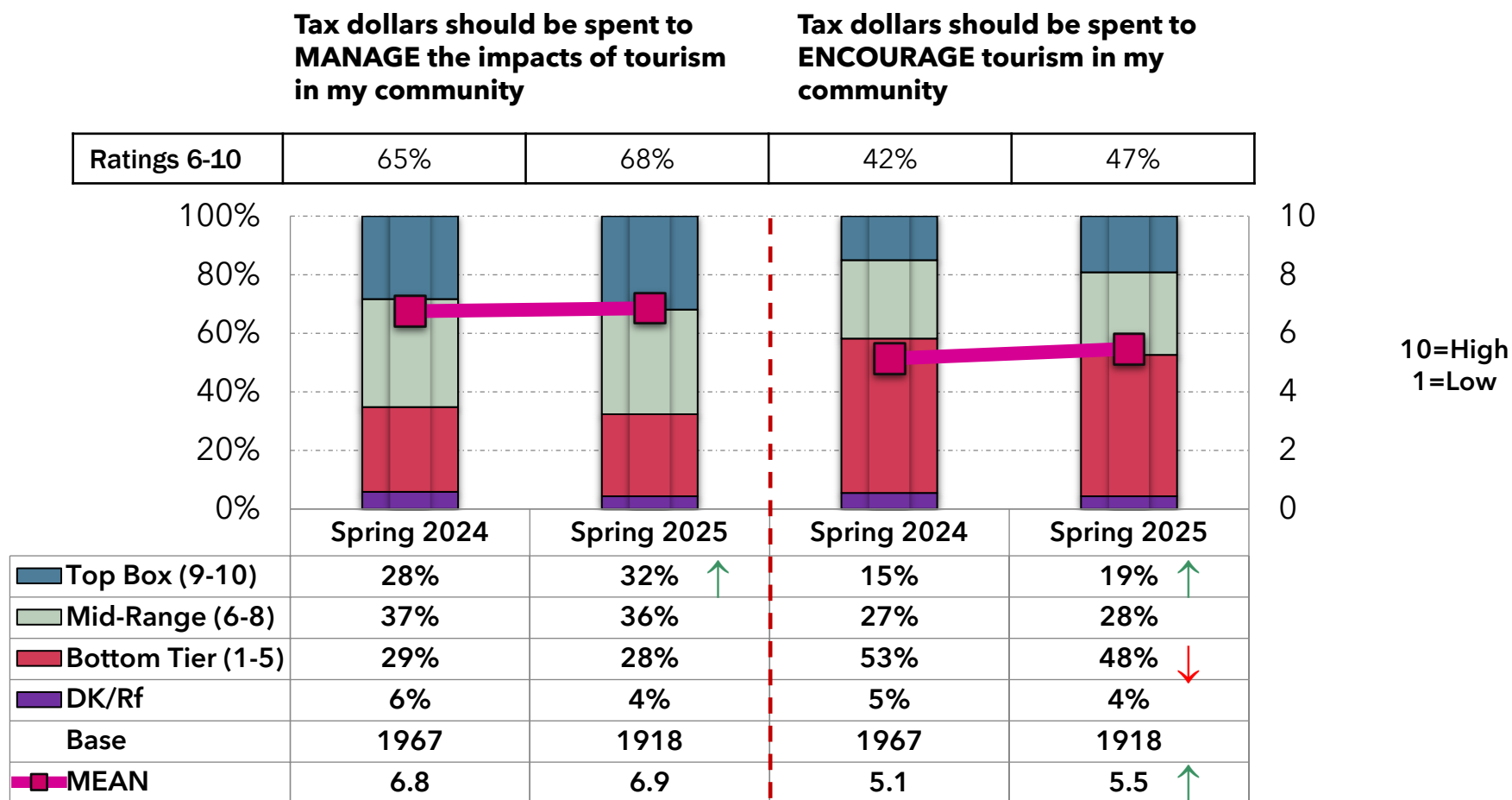
Q4.2. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

Balance: Negative Impacts/Managed Tourism



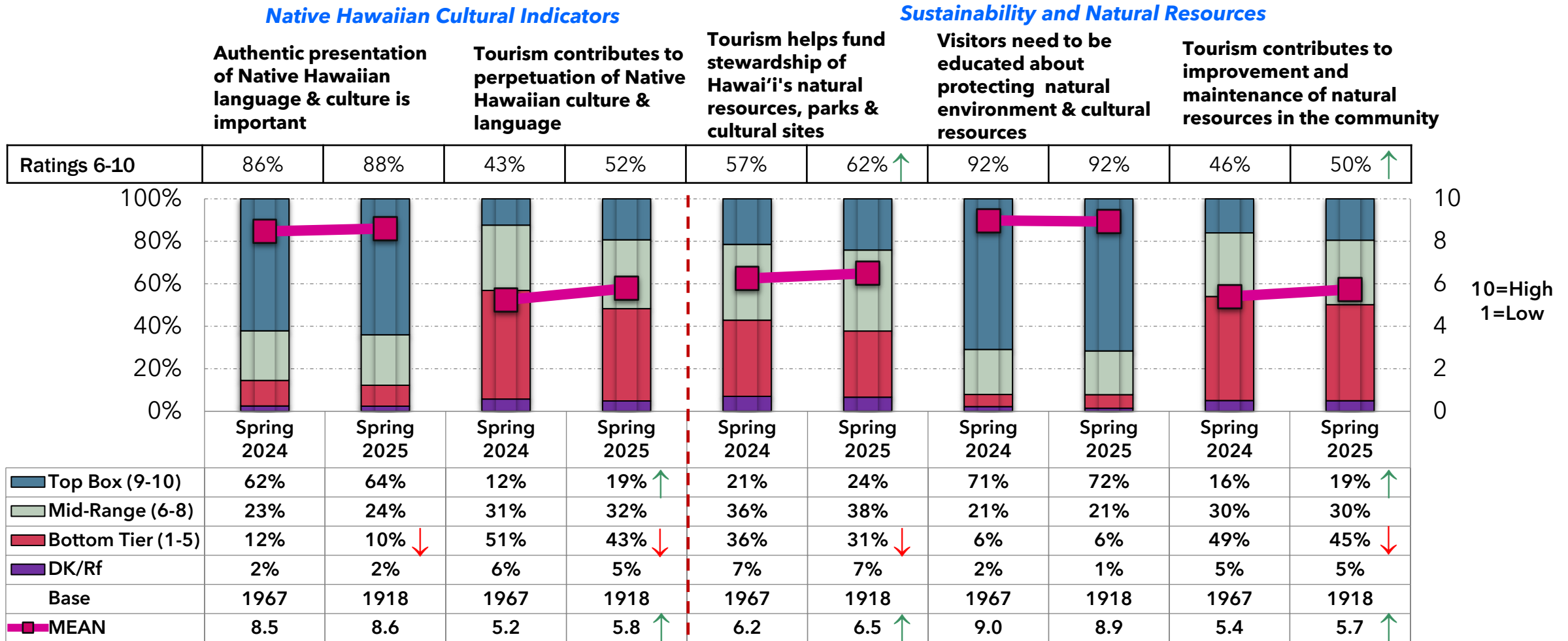
Q.4. I'm going to read you some statements about tourism, and ask you to please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

Tax Dollars Should Be Spent to Manage/Encourage Tourism



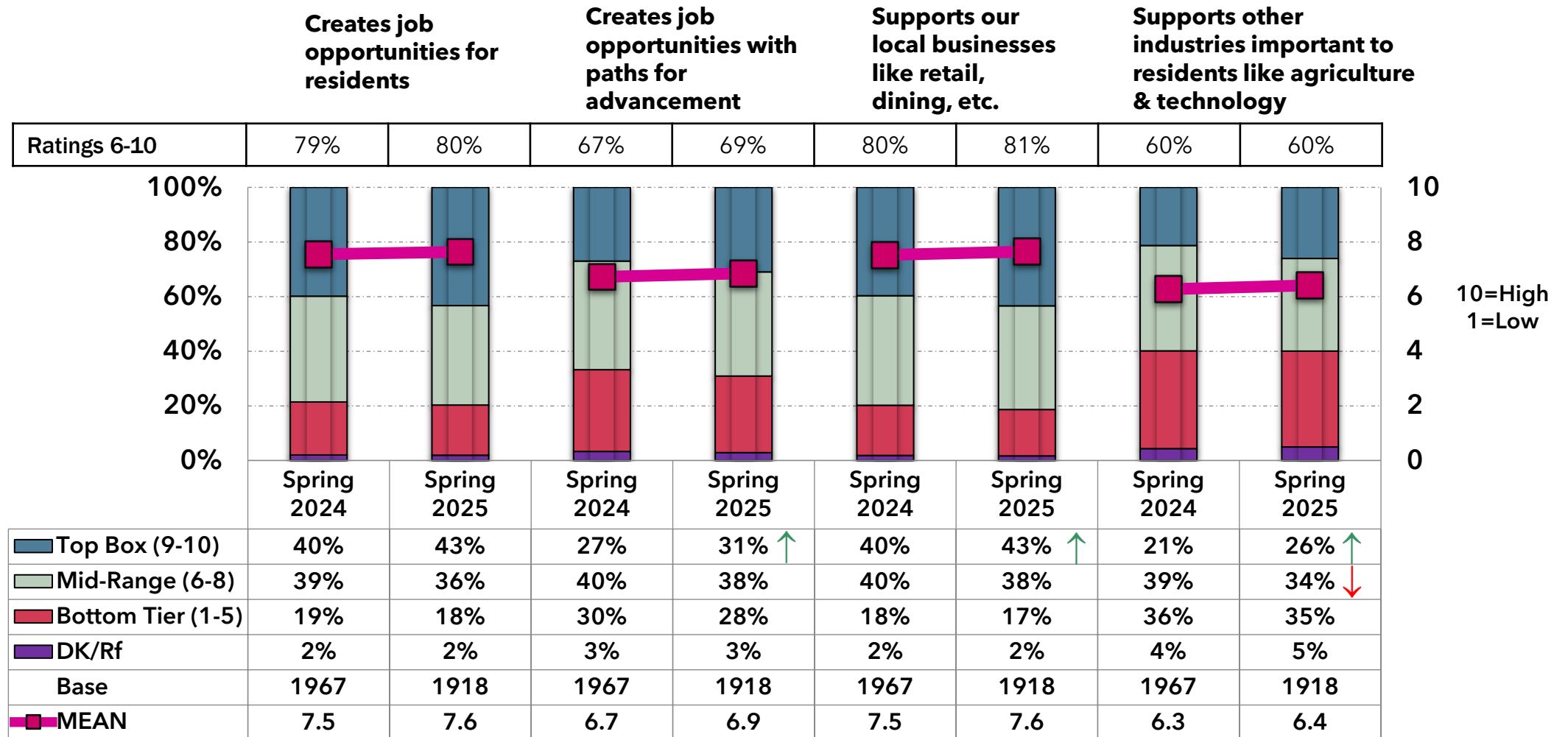
Q13.1 Using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All, how much do you agree or disagree that....[INSERT]

Native Hawaiian & Sustainability Indicators



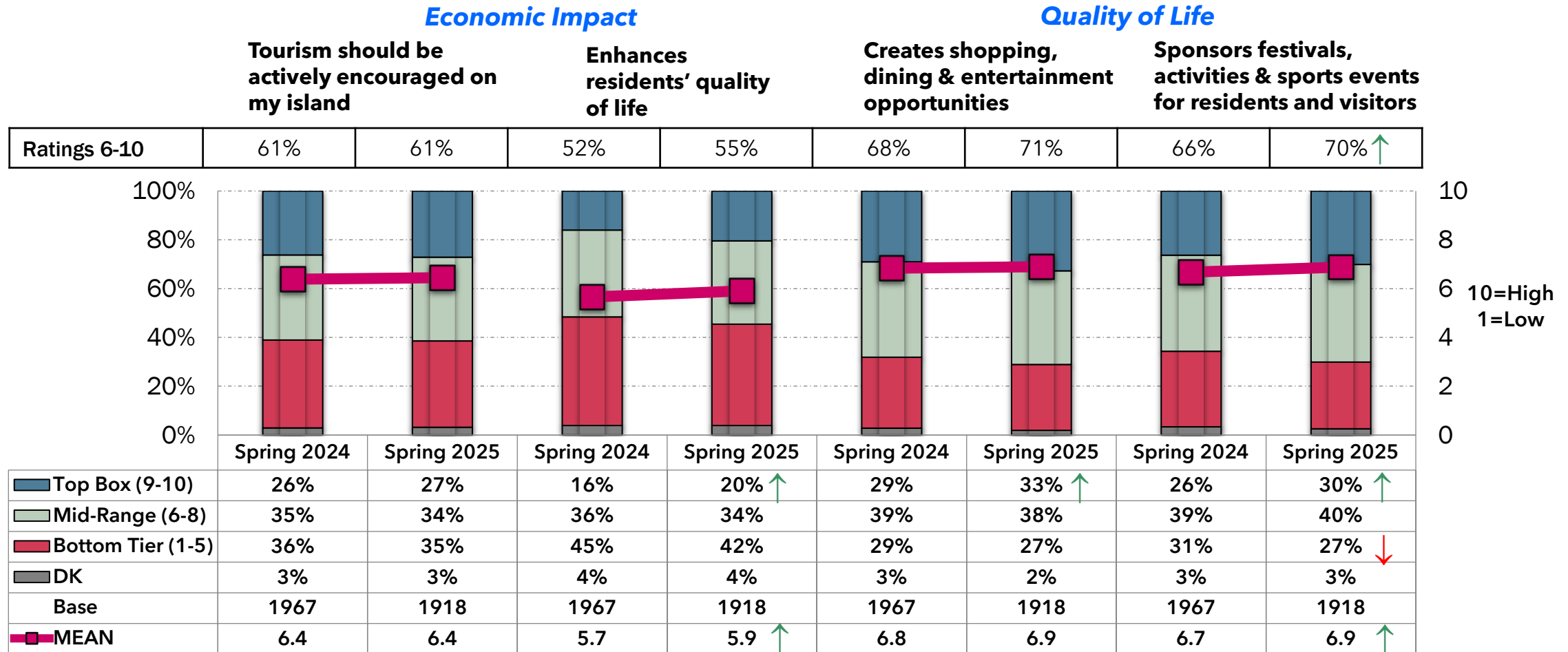
Q.4. I'm going to read you some statements about tourism, and ask you to please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

Economic Impact Indicators



Q.4. I'm going to read you some statements about tourism, and ask you to please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

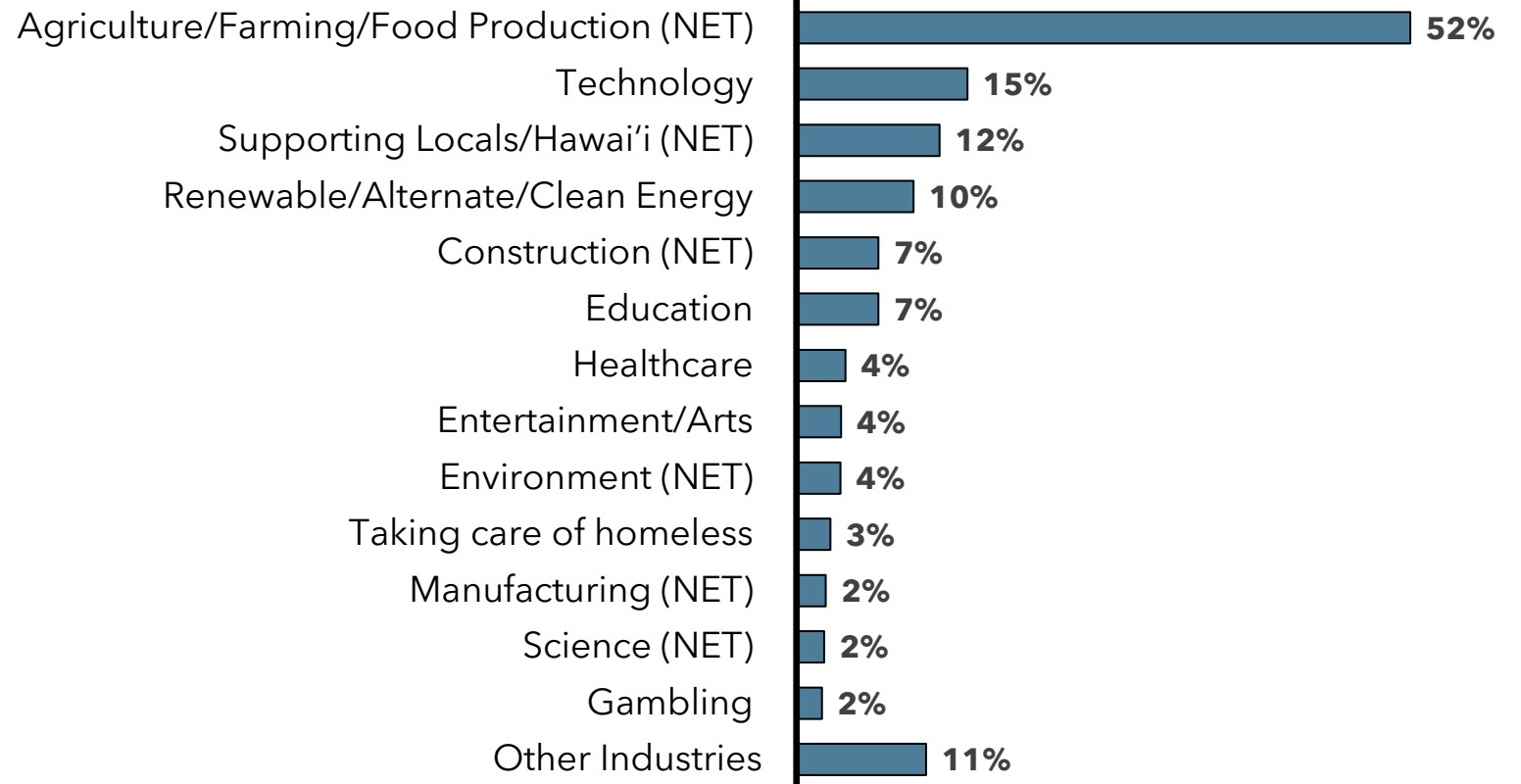
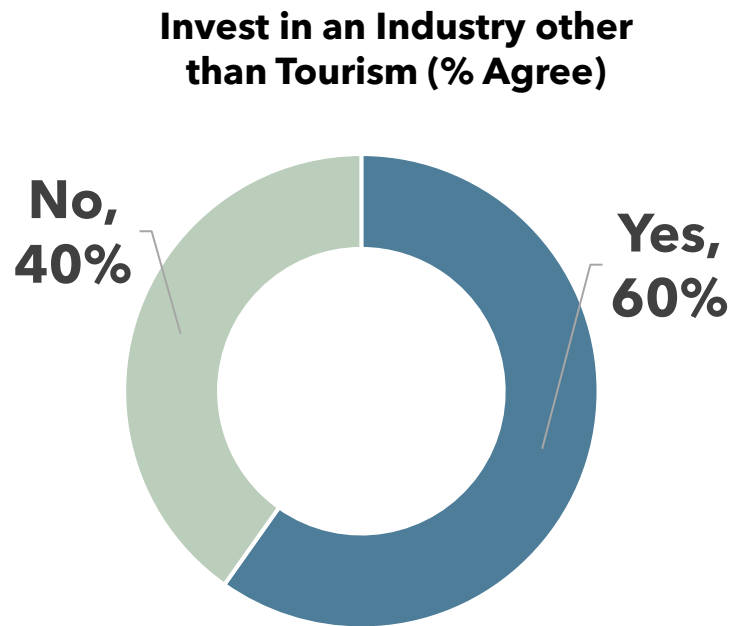
Economic Impact (continued)/Quality of Life



Q.4. I'm going to read you some statements about tourism, and ask you to please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

Investing in Other Industries in Hawai'i

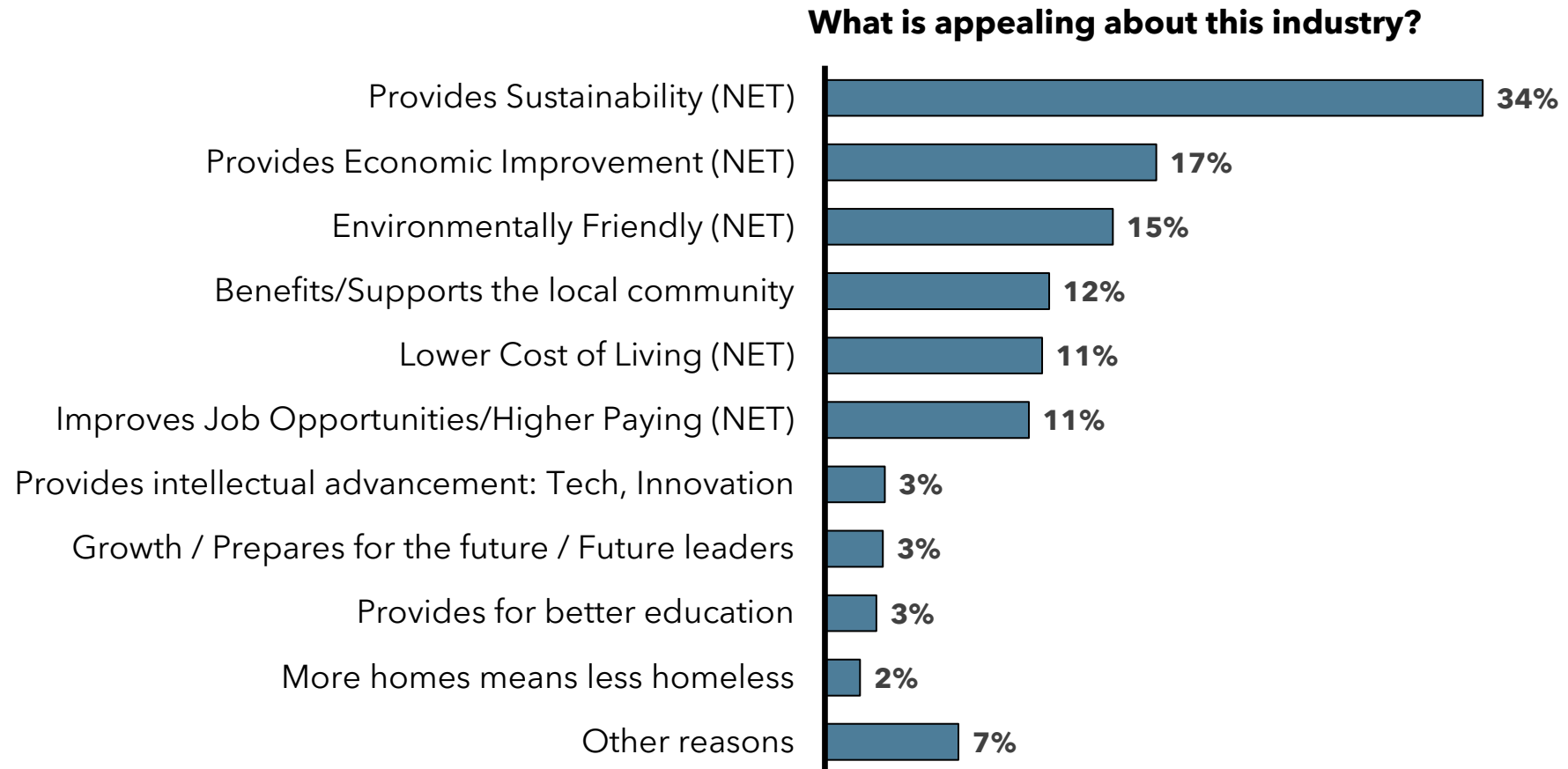
What other Industries should Hawai'i Invest in?



Q12. Hawai'i's Department of Business, Economic Development and Tourism works to make the state's economy more diverse and sustainable. In your opinion, is there another industry other than tourism which Hawai'i should be investing resources in? Base: 1,913

Q12A. In your opinion, you feel that there is another industry which Hawai'i should be investing resources in. What would that other industry be? Any others? Base: 1,194

Appeal of Investing in Other Industries



Q12B. What do you find most appealing about this industry? Base: 1,191

Mahalo from the Omnitrak Group





DBEDT **VISITOR** **SATISFACTION** **STUDY Q2 2025**

Prepared for the Hawaii Tourism Conference

September 2025



QUESTIONS WE'LL ANSWER



How satisfied are visitors with their recent trip to Hawai'i?



How likely are recent visitors to come back again?



How and where might visitors and residents cross paths?



How does Hawai'i's tourism product affect the visitor experience?

SURVEY METHODOLOGY

- Survey of visitors from eight visitor markets who recently completed a trip to Hawai‘i.
- Email and intercept survey among visitors who stayed for at least two days.
- Data were statistically adjusted to be representative of the population of visitor parties entering Hawai‘i during the quarter.

Visitor market	Completed	Margin of Error $\pm$	Response Rate
U.S. West	2,786	1.86	6.36%
U.S. East	1,954	2.22	6.68%
Japan	338	5.33	14.76%
Canada	300	5.66	11.75%
Oceania	184	7.22	11.17%
China	52	13.59	6.75%
Korea	281	5.85	47.87%
Europe	307	5.59	9.83%
All visitor markets	6,202	1.24	7.38%

A family of five is walking away from the camera on a sandy beach towards the ocean. The scene is backlit by a bright sunset, creating a warm orange and red glow. The silhouettes of the family members are clearly visible against the bright sky. The text is overlaid on the left side of the image.

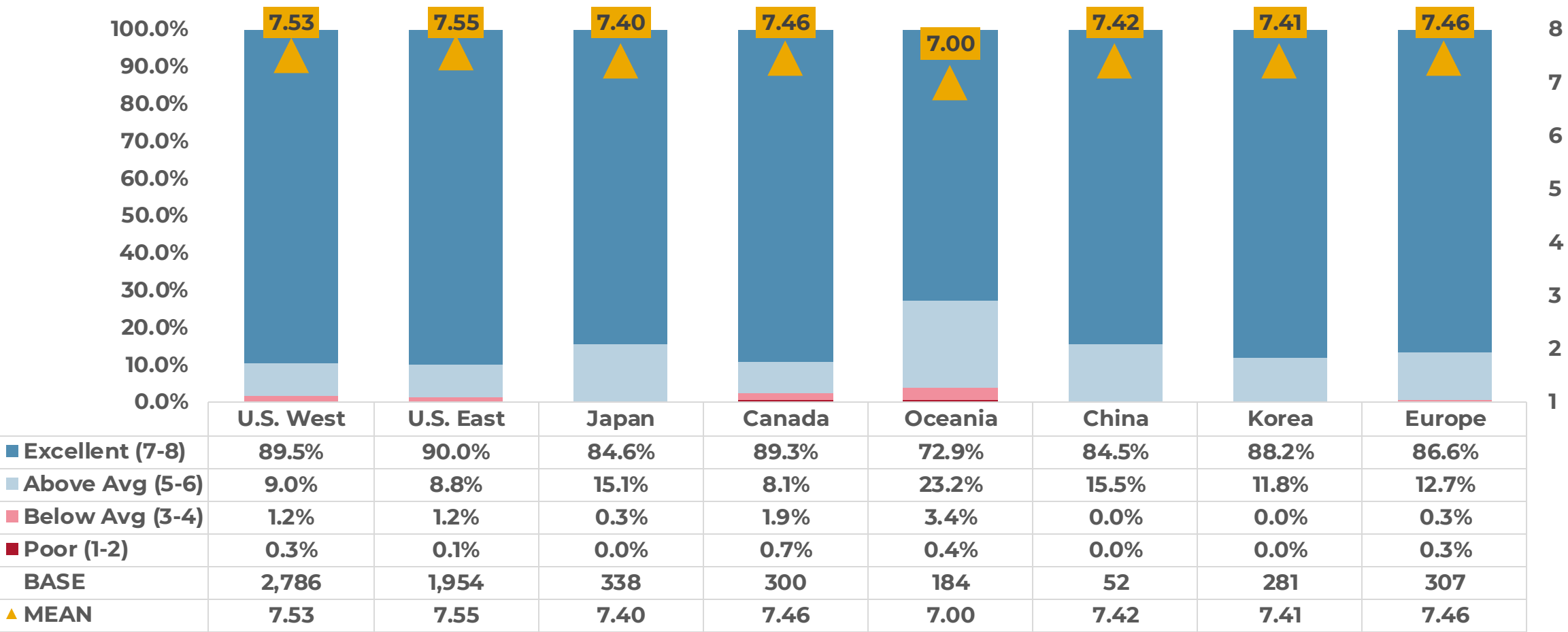
HOW SATISFIED ARE VISITORS WITH THEIR RECENT TRIP TO HAWAI'I?

DBEDT

[ANTHOLOGY]
FINN
PARTNERS

SATISFACTION | STATE OF HAWAI'I BY VISITOR MARKET

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

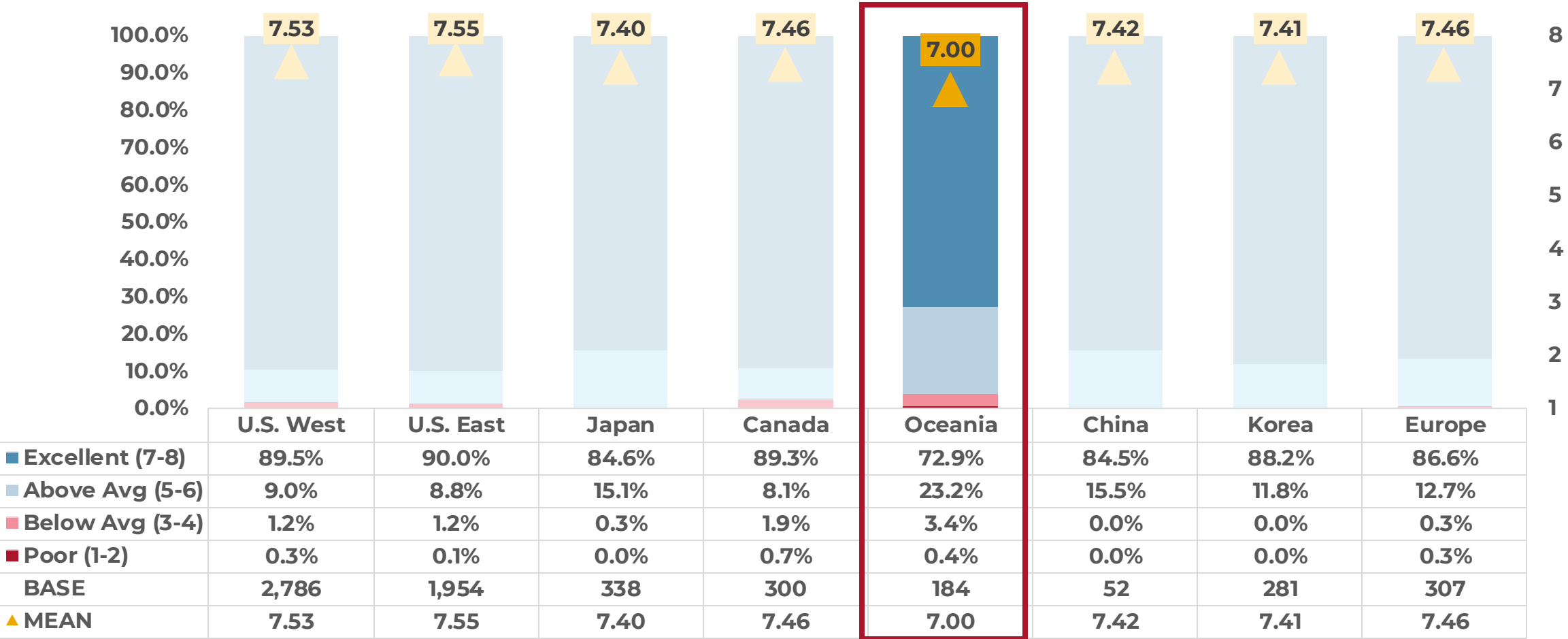


Q. How would you rate your most recent trip to the state of Hawai'i? How would you rate your experience on___?



SATISFACTION | STATE OF HAWAI'I BY VISITOR MARKET

8-pt Rating Scale
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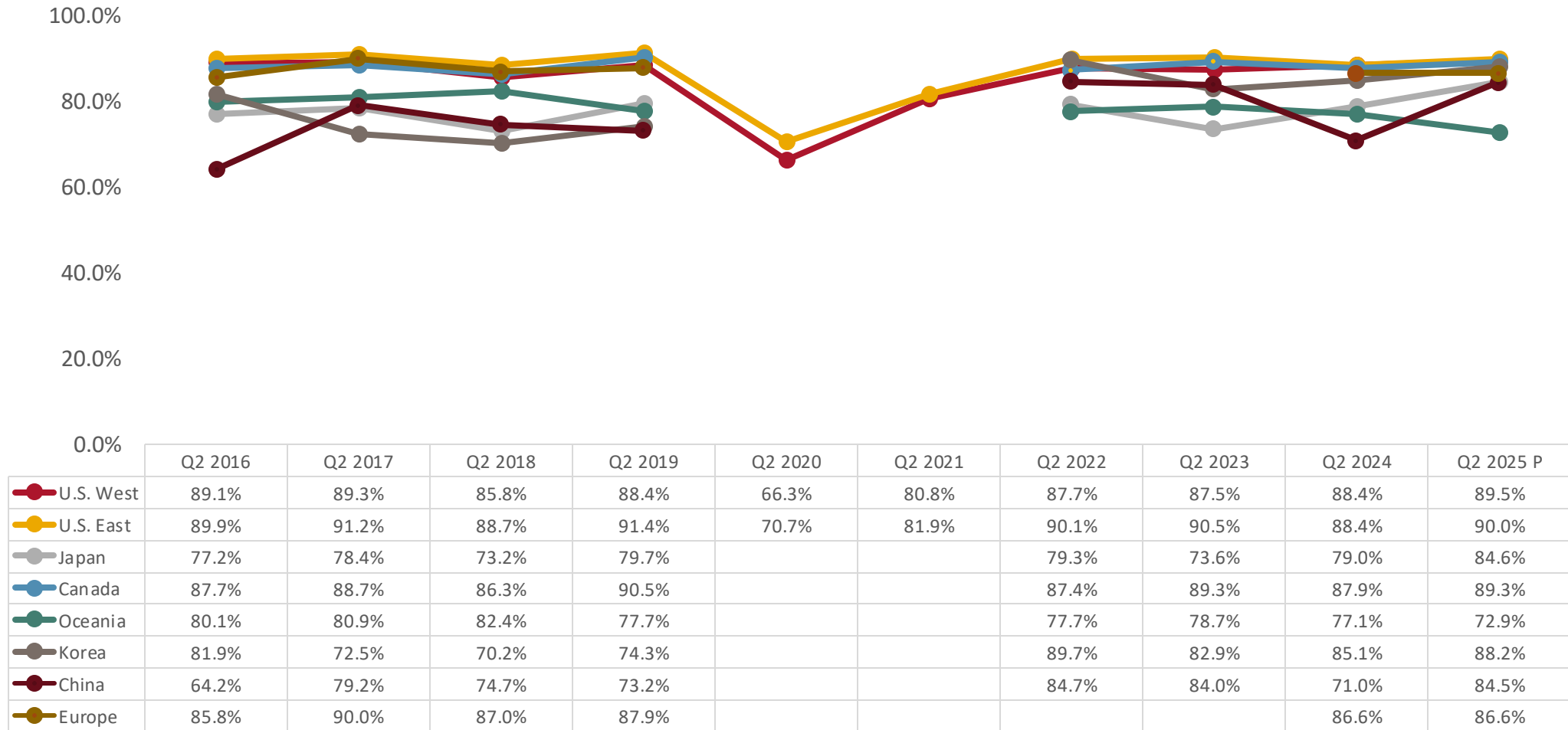


Q. How would you rate your most recent trip to the state of Hawai'i? How would you rate your experience on___?



SATISFACTION | STATE OF HAWAI'I BY VISITOR MARKET

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



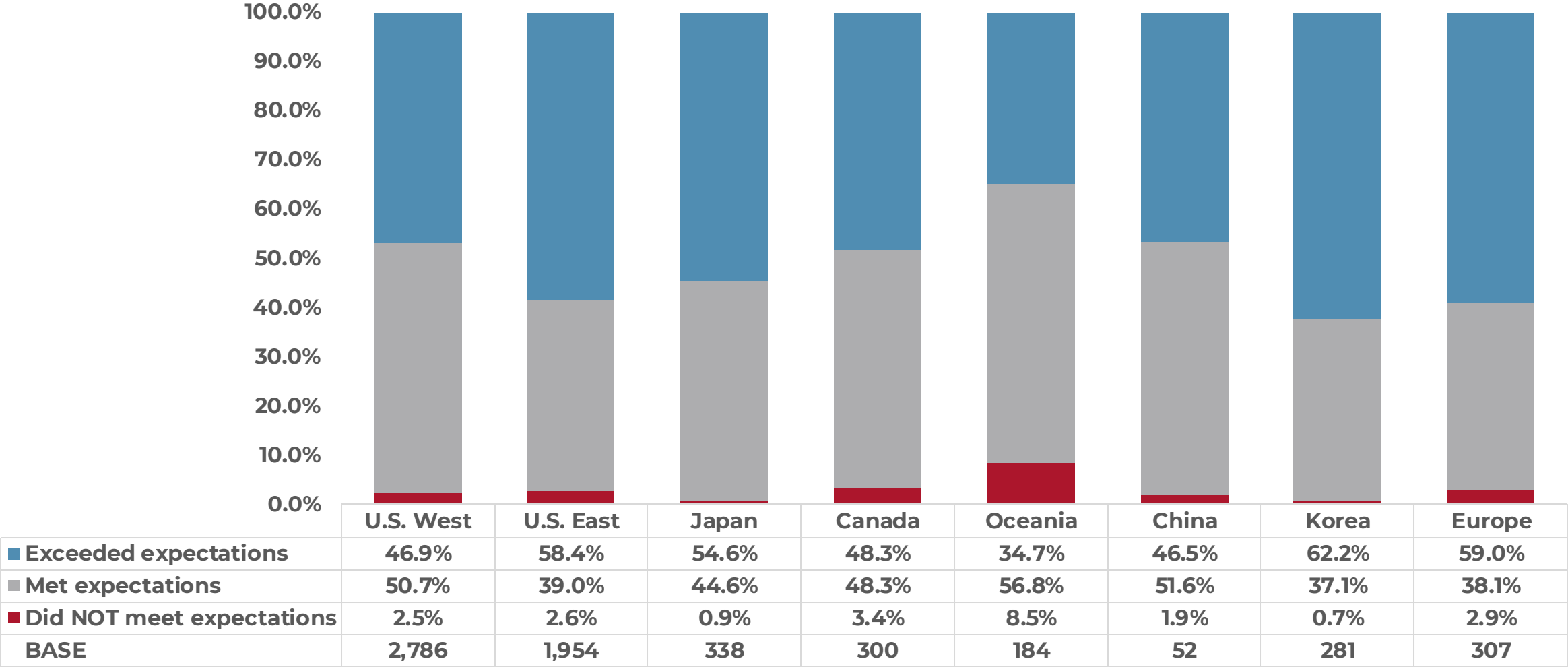
P= Preliminary Data

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

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

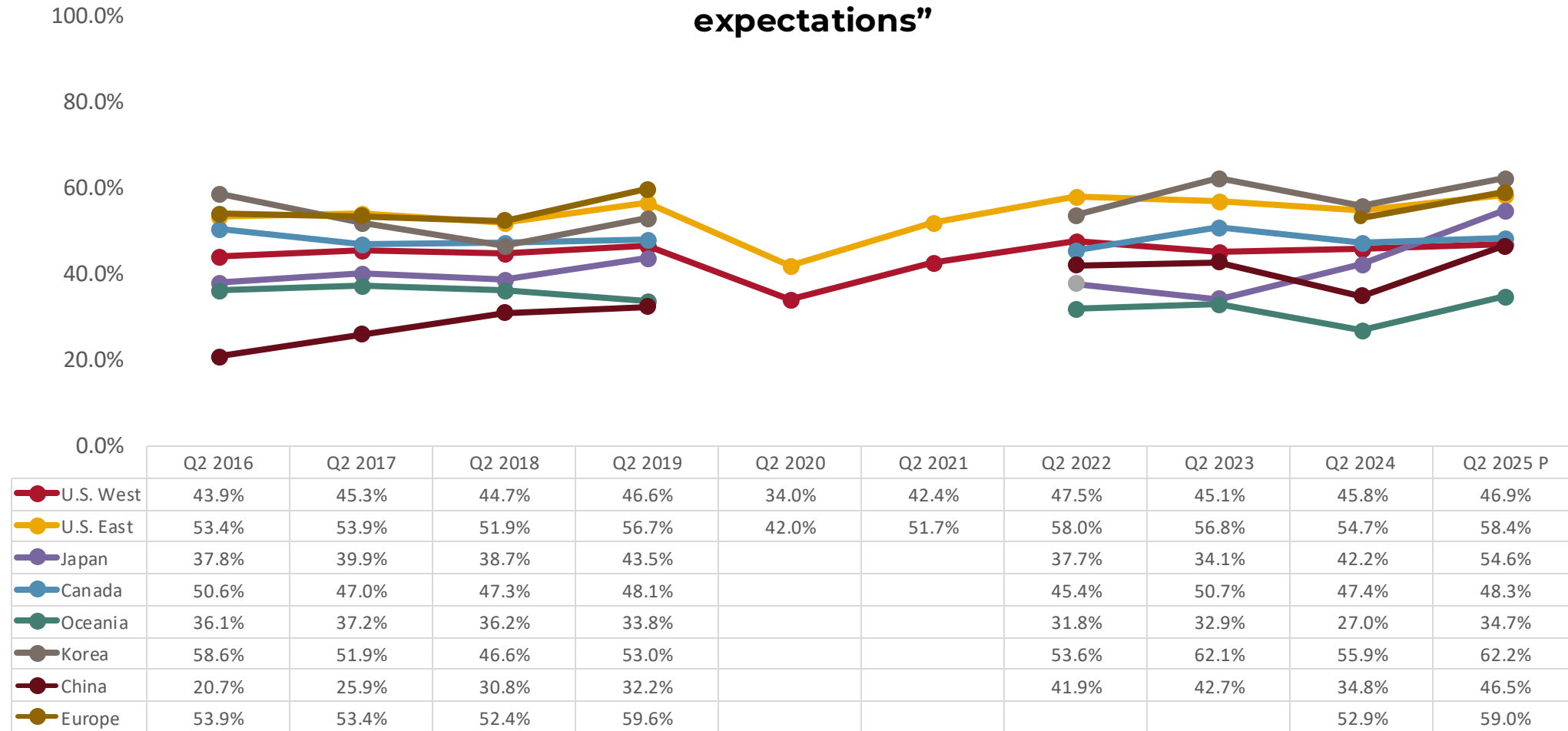


Q. Would you say this trip to Hawai'i ___?



SATISFACTION | HAWAI'I TRIP EXPECTATIONS

Tracking Data – Rating of “Exceeded expectations”



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.

A family of five is walking away from the camera on a sandy beach towards the ocean. The scene is backlit by a bright sunset, creating a warm orange and red glow. The silhouettes of the family members are clearly visible against the bright sky. The text 'HOW LIKELY ARE RECENT VISITORS TO COME BACK AGAIN?' is overlaid in large, white, bold, sans-serif capital letters on the left side of the image.

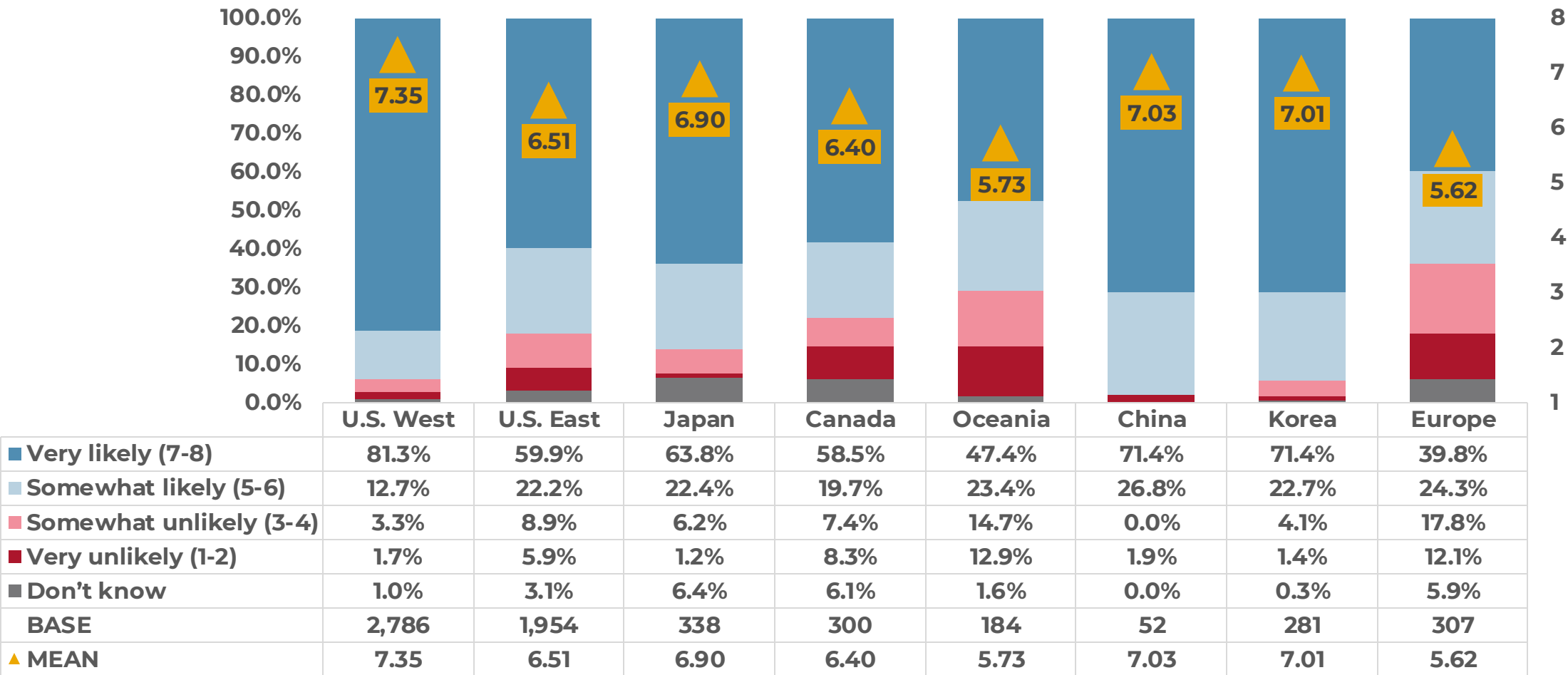
**HOW LIKELY ARE
RECENT VISITORS
TO COME BACK
AGAIN?**

DBEDT

[ANTHOLOGY]
FINN
PARTNERS

LIKELIHOOD OF RETURN VISIT

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

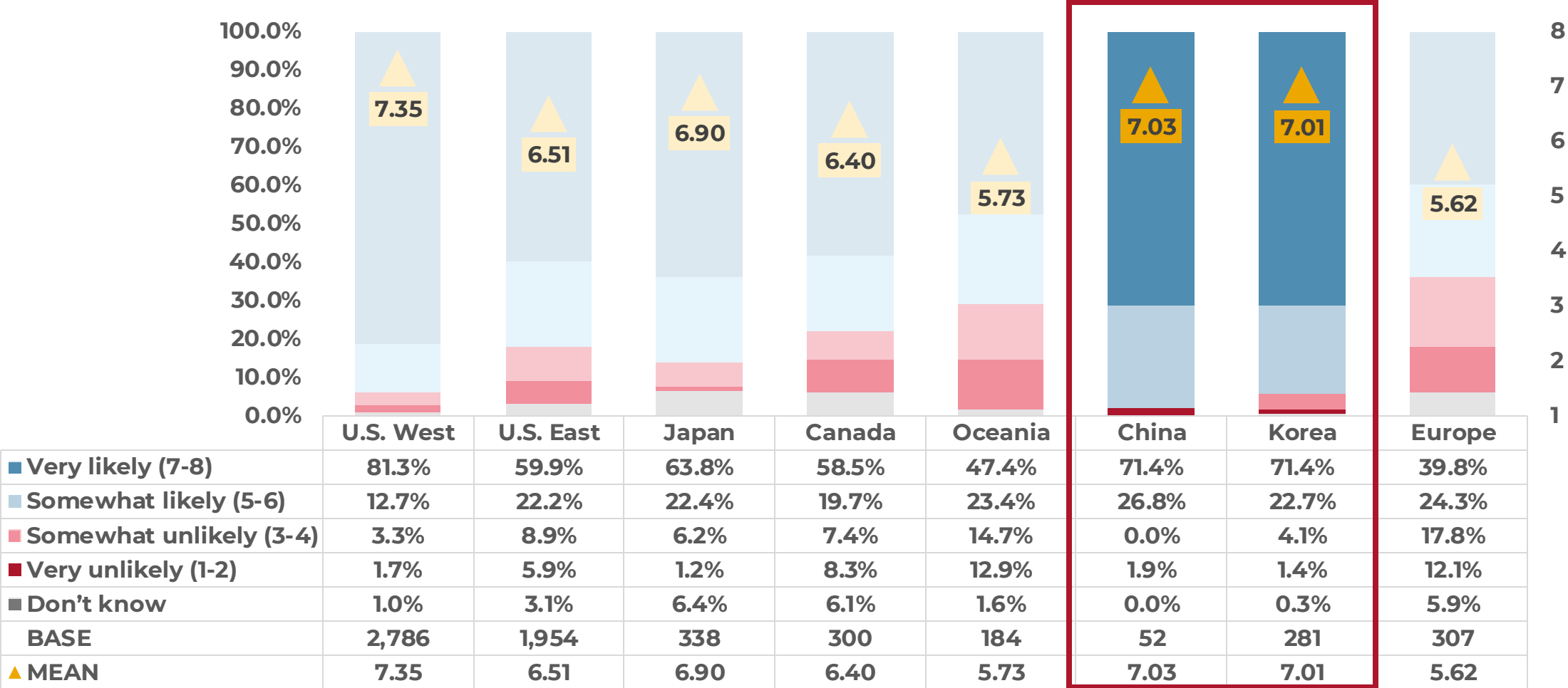


Q. How likely are you to return to the state of Hawai'i in the next five years?



LIKELIHOOD OF RETURN VISIT

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



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

LIKELIHOOD OF RETURN VISIT

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

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

	Q2 2016	Q2 2017	Q2 2018	Q2 2019	Q2 2020	Q2 2021	Q2 2022	Q2 2023	Q2 2024	Q2 2025 P
U.S. West	81.6%	72.1%	73.8%	83.1%	85.9%	79.0%	80.4%	79.8%	81.9%	81.3%
U.S. East	54.6%	54.3%	59.0%	61.2%	75.4%	63.3%	62.3%	59.8%	60.8%	59.9%
Japan	55.8%	55.1%	59.3%	62.9%			82.0%	59.5%	66.0%	63.8%
Canada	65.0%	61.0%	66.0%	70.0%			69.4%	64.7%	63.2%	58.5%
Oceania	58.0%	50.9%	60.6%	54.0%			67.9%	58.9%	50.5%	47.4%
Korea	78.4%	72.4%	58.4%	65.6%			87.9%	71.1%	68.9%	71.4%
China	53.8%	60.3%	54.1%	61.8%			65.0%	78.0%	60.7%	71.4%
Europe	39.3%	43.2%	43.1%	48.3%					45.3%	39.8%

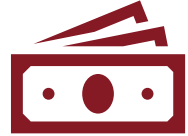
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Q. How likely are you to return to the state of Hawai‘i in the next five years?

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.

LIKELIHOOD OF RETURN VISIT



1. High cost of travel



2. Preference for other destinations



3. Long travel distance

After cost, “Political climate concerns” are a top reason not to return among visitors from Canada.

A group of people, including adults and children, are walking away from the camera on a sandy beach towards the ocean. The scene is backlit by a bright sunset, creating a warm orange and red glow. The silhouettes of the people are dark against the bright sky. The text 'HOW AND WHERE MIGHT VISITORS AND RESIDENTS CROSS PATHS?' is overlaid in large, bold, white capital letters on the left side of the image.

HOW AND WHERE MIGHT VISITORS AND RESIDENTS CROSS PATHS?

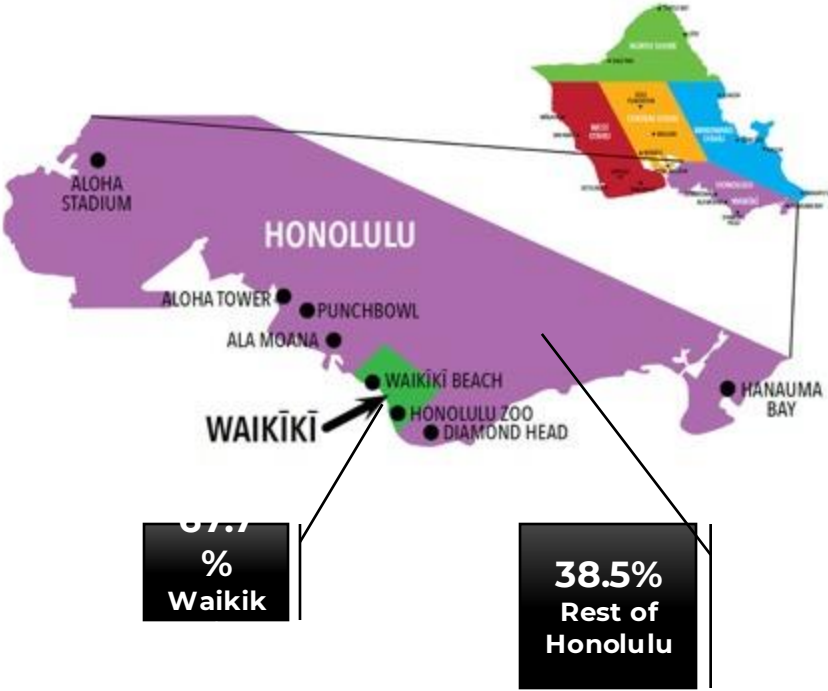
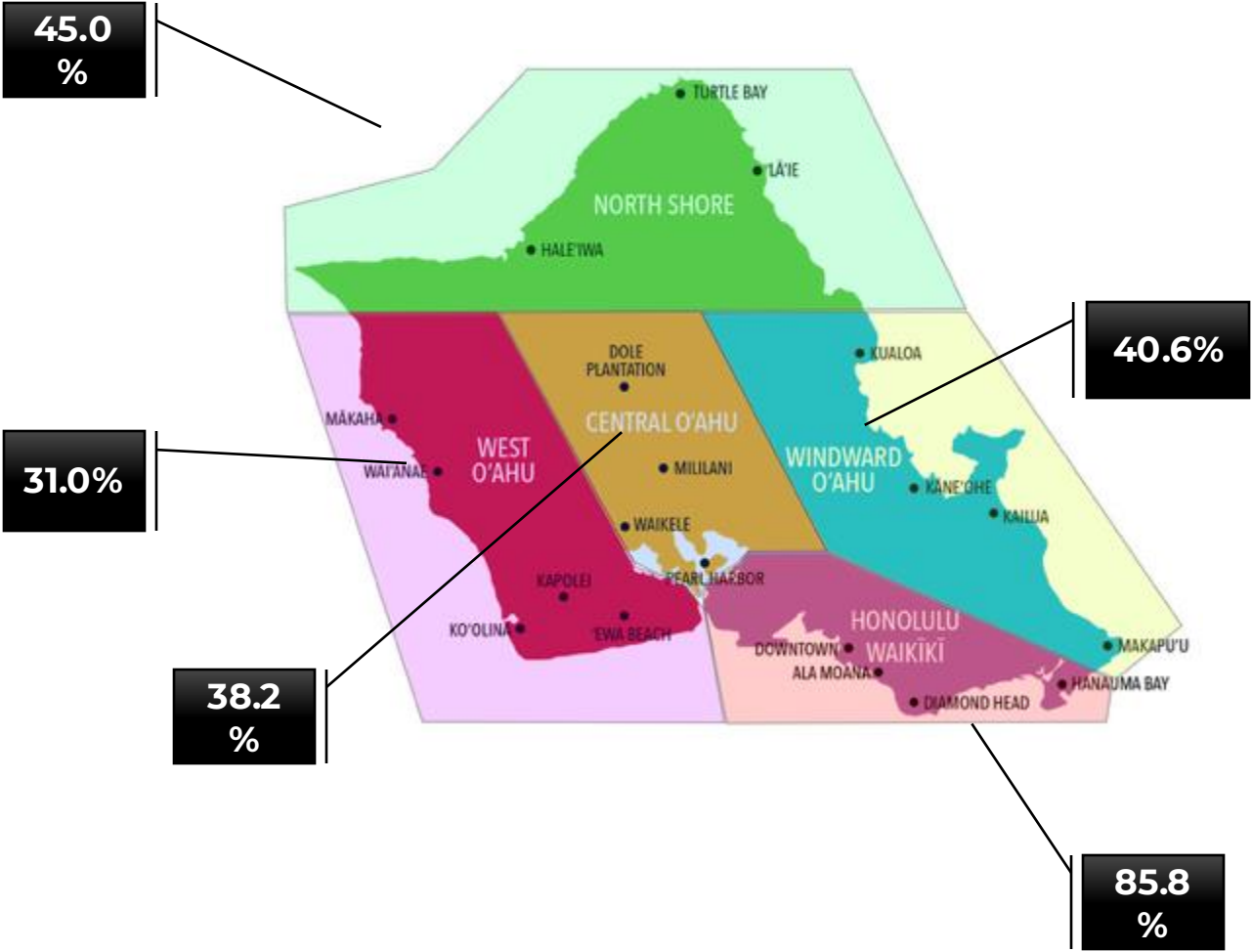
TRANSPORTATION METHODS

Is on-island transportation contributing to the perception of crowding?

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

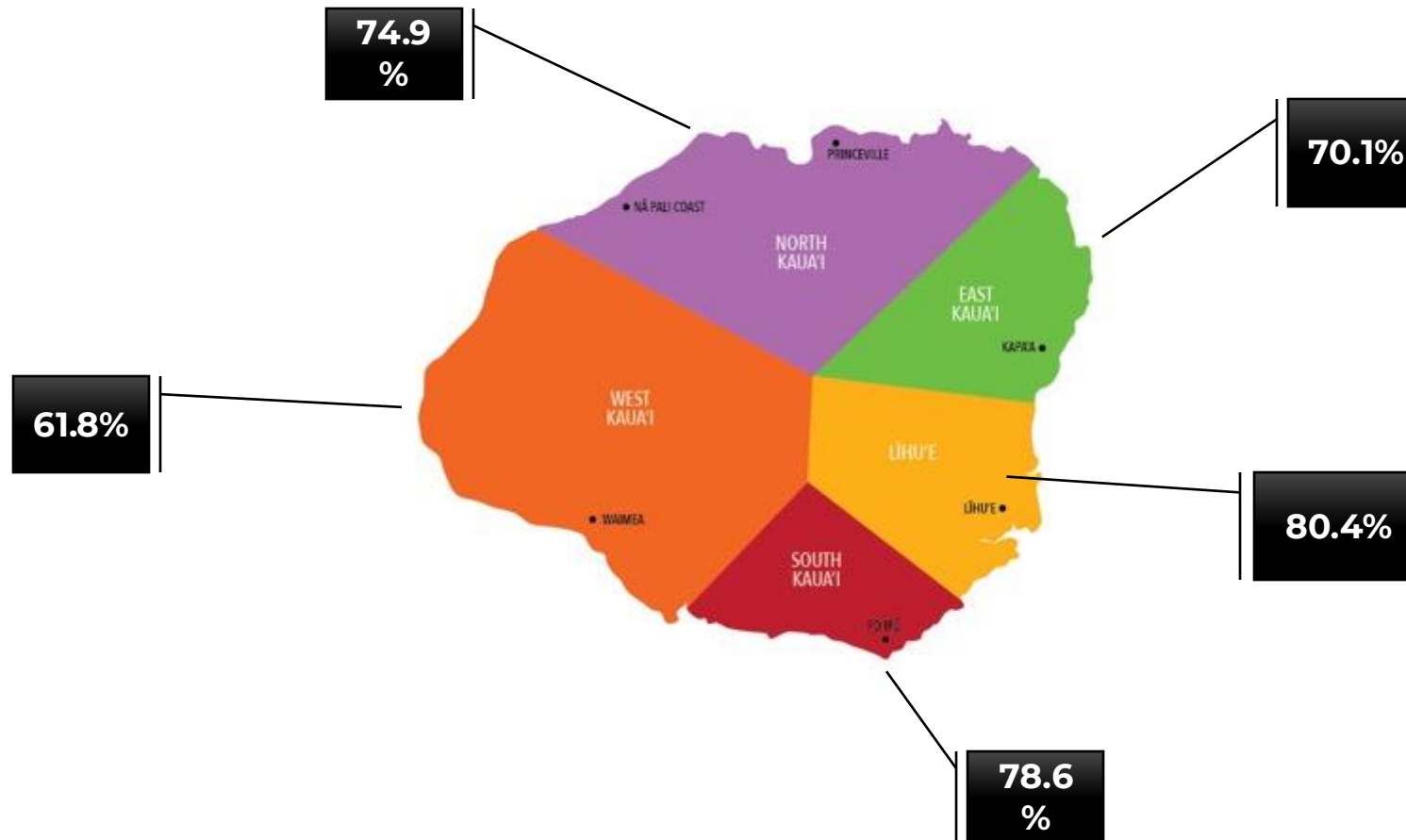
Q. During this trip, which of the following activities did you participate in?

AREAS VISITED | O'AHU - U.S. WEST



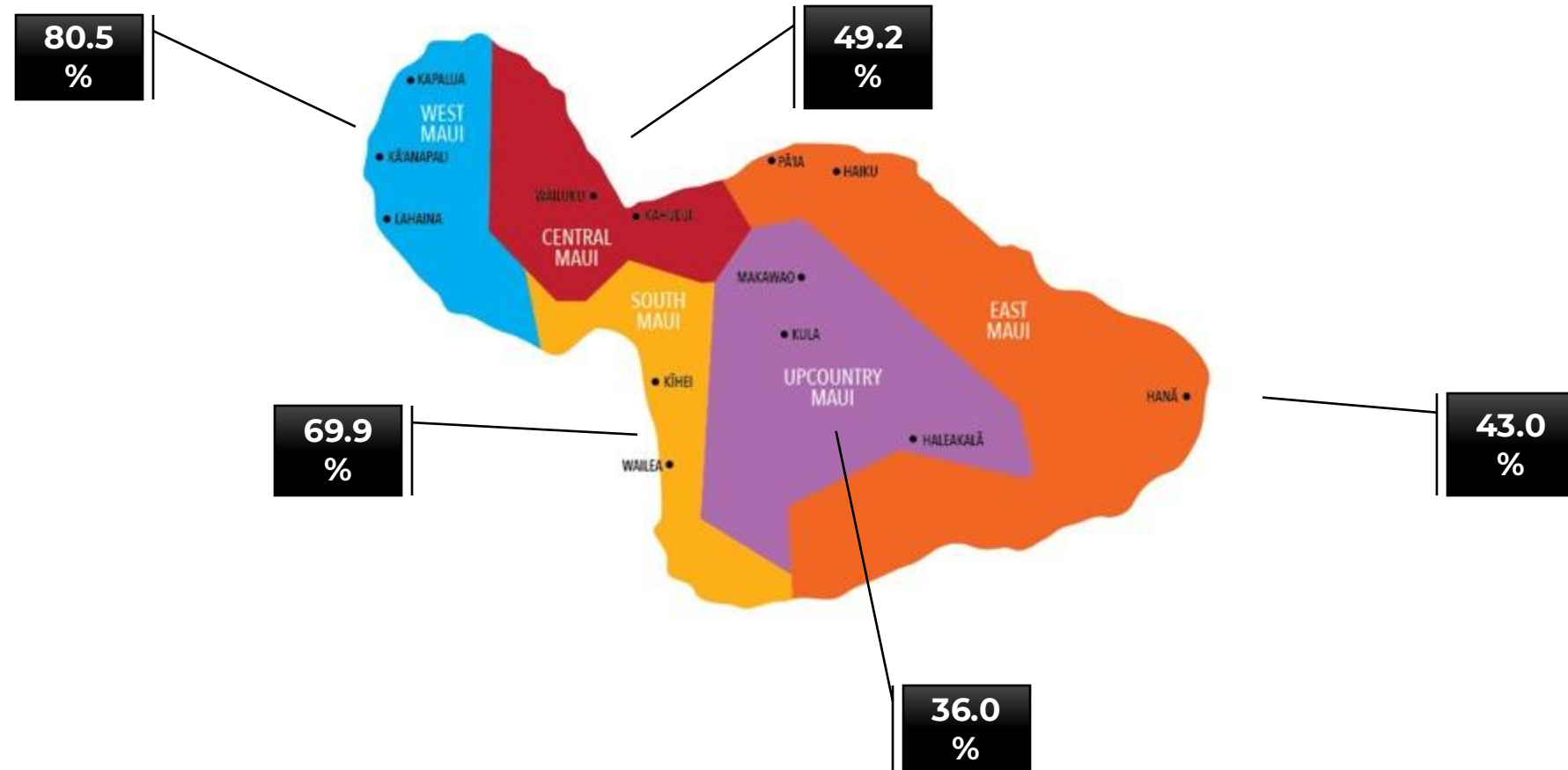
Q. Which of the following areas did you visit during your stay on O'ahu?

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



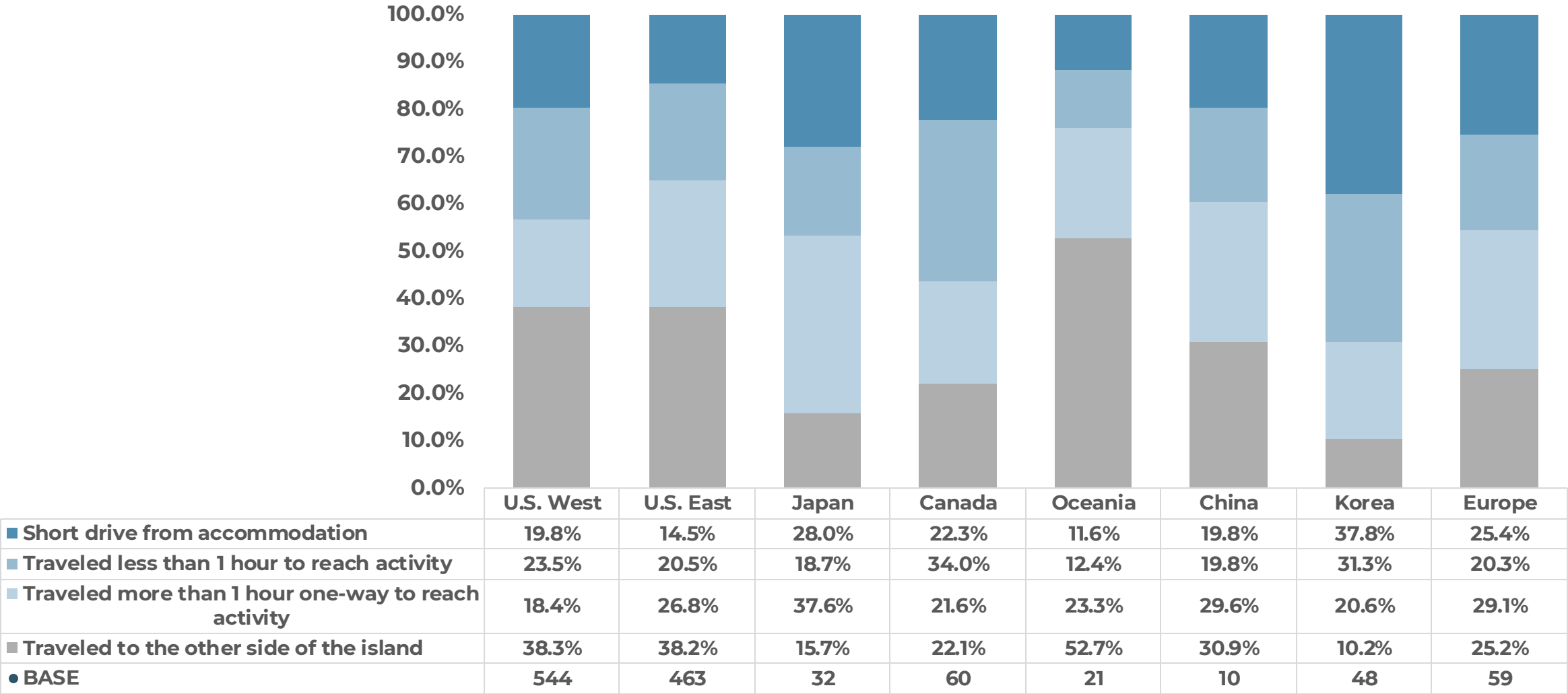
Q. Which of the following areas did you visit during your stay on Kaua'i?

AREAS VISITED | MAUI - U.S. WEST



Q. Which of the following areas did you visit during your stay on Maui?

TRAVEL ON ISLAND OF HAWAI'I



Q. Which of the following best describes your travel while on the island of Hawai'i?



ACTIVITIES

Where are visitors and residents likely to cross paths?

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
Sightseeing on own (self-guided)/ driving around island	87.2%	85.7%	81.1%	81.7%	56.5%	63.8%	80.7%	77.7%
Beach/ sunbathing	85.5%	84.4%	74.5%	88.4%	65.3%	75.0%	83.0%	85.8%
Scenic views/ natural landmarks	66.9%	75.9%	23.7%	69.9%	50.0%	89.5%	63.7%	70.4%
Supermarkets	64.9%	58.1%	69.5%	62.9%	59.3%	52.7%	59.1%	74.4%
Local shops and artisans	62.7%	66.1%	14.1%	60.7%	45.3%	31.0%	20.1%	59.1%
Visit towns/ communities	57.0%	62.1%	40.5%	51.4%	30.4%	43.0%	46.0%	53.0%
Malls/ department stores	49.1%	46.4%	86.5%	58.6%	71.5%	63.2%	82.6%	64.5%
Hiking	41.0%	49.0%	20.0%	45.3%	18.4%	45.0%	24.4%	49.6%
Parks/ botanical gardens	36.1%	44.0%	25.8%	38.0%	31.3%	34.5%	29.4%	39.7%
Historic Hawaiian sites and museums	34.9%	42.7%	21.3%	36.7%	39.7%	32.8%	11.3%	38.9%
Historic military sites and museums	18.7%	31.0%	11.4%	22.5%	44.7%	44.7%	24.2%	37.9%

Q. During this trip, which of the following activities did you participate in?

The background of the slide is a photograph of a group of people walking away from the camera on a beach at sunset. The sky is a gradient of orange and yellow, and the ocean is visible in the distance. The people are silhouetted against the bright light of the setting sun.

HOW DOES HAWAI'I'S TOURISM PRODUCT AFFECT THE VISITOR EXPERIENCE?

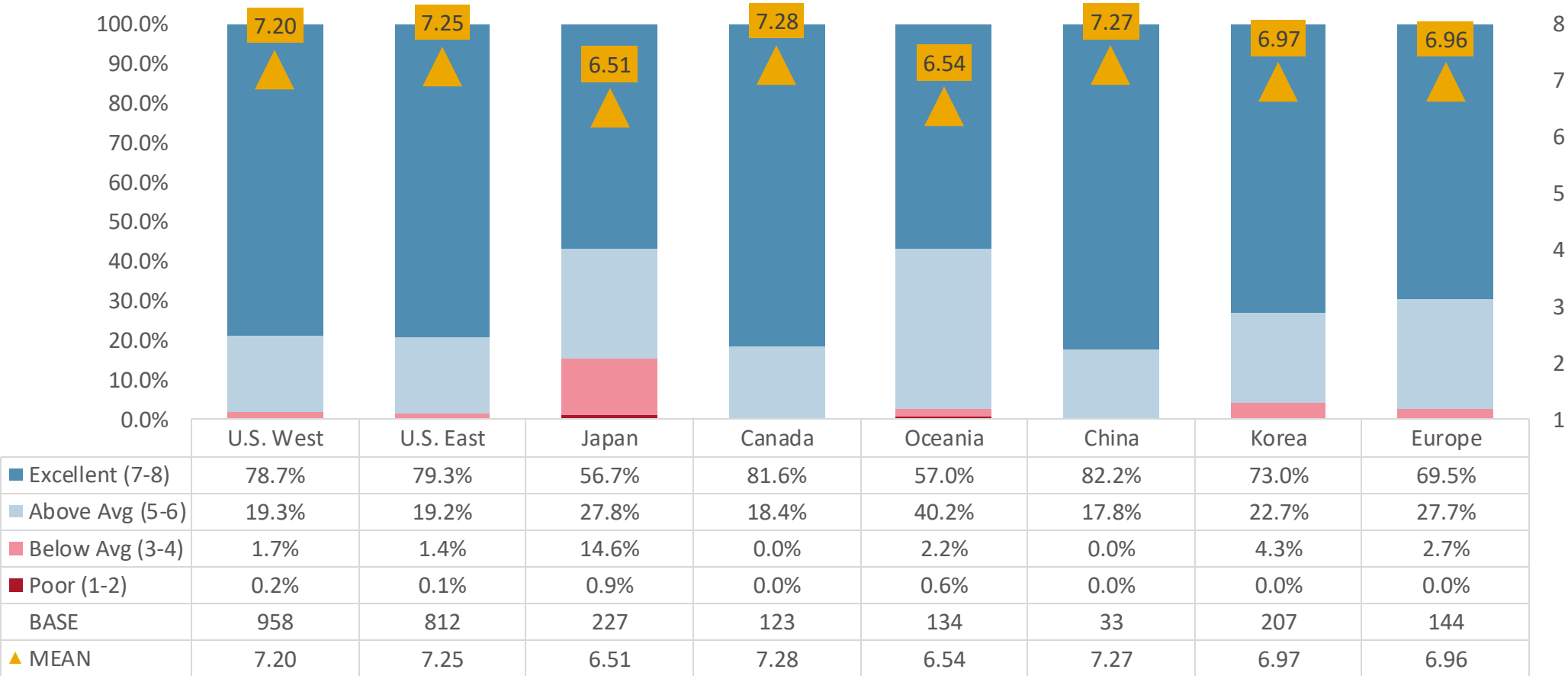
O'AHU EXAMPLE

DBEDT

[ANTHOLOGY]
FINN
PARTNERS

ENTERTAINMENT/ ATTRACTIONS – O’AHU

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

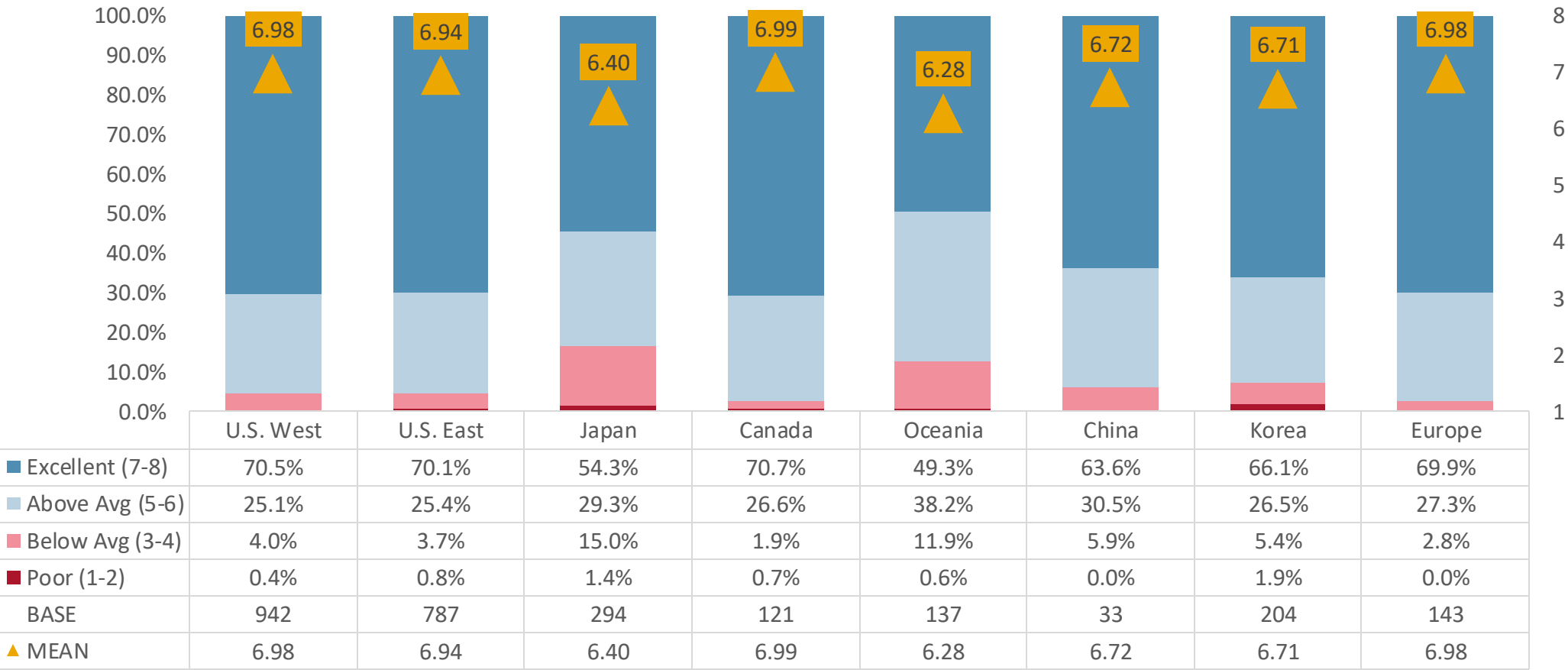


Q. How would you rate the following aspects of your most recent visit to O’ahu?



SHOPPING – O’AHU

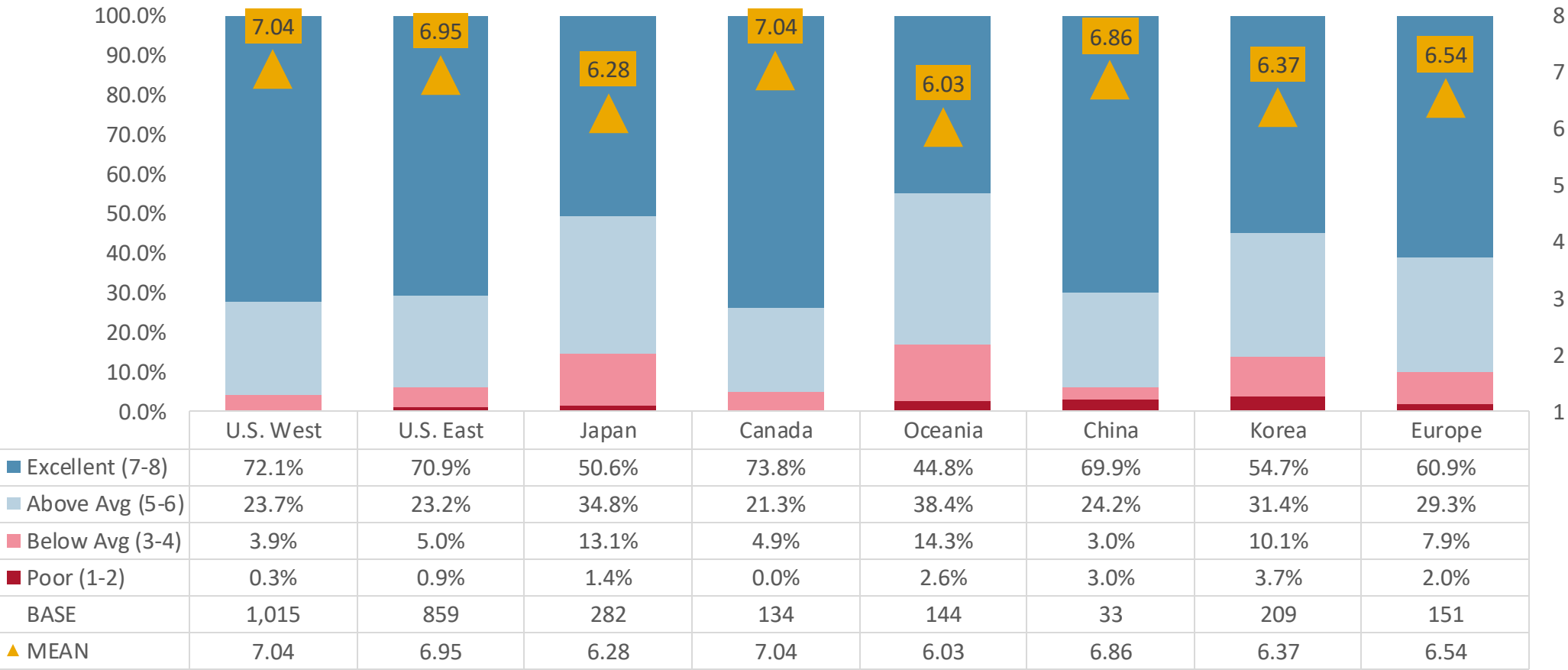
8-pt Rating Scale
8 = Excellent / 1 = Poor



Q. How would you rate the following aspects of your most recent visit to O’ahu?

DINING/ FOOD & BEVERAGES – O’AHU

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

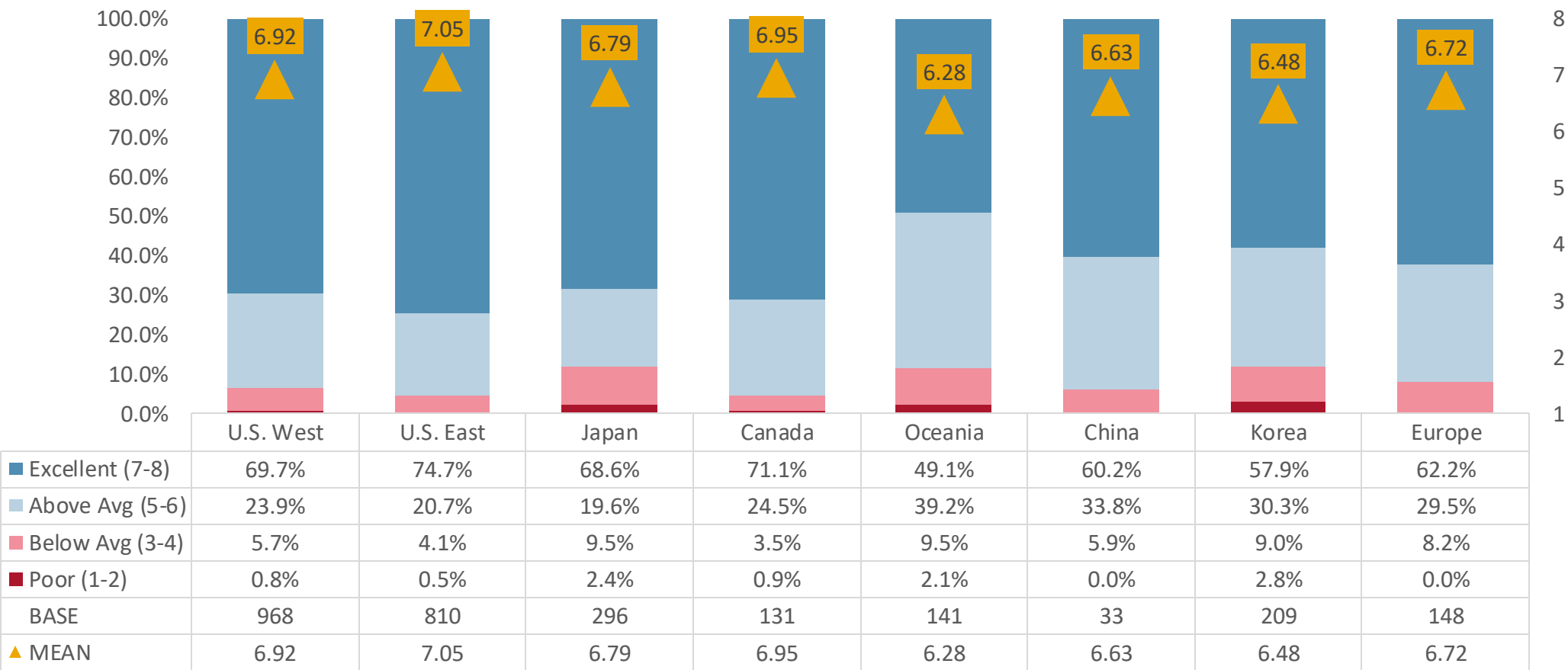


Q. How would you rate the following aspects of your most recent visit to O’ahu?



LODGING/ ACOMMODATIONS – O’AHU

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

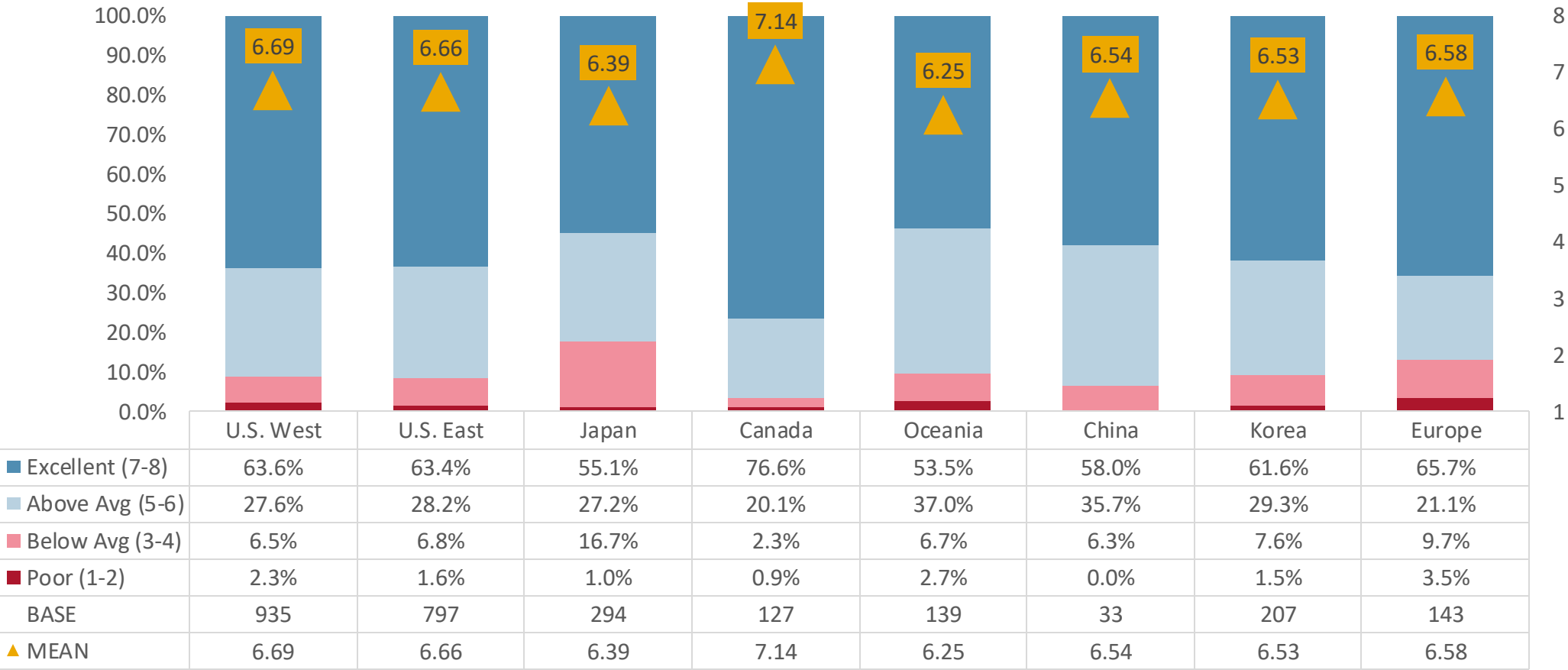


Q. How would you rate the following aspects of your most recent visit to O’ahu?



TRANSPORTATION ON ISLAND – O’AHU

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

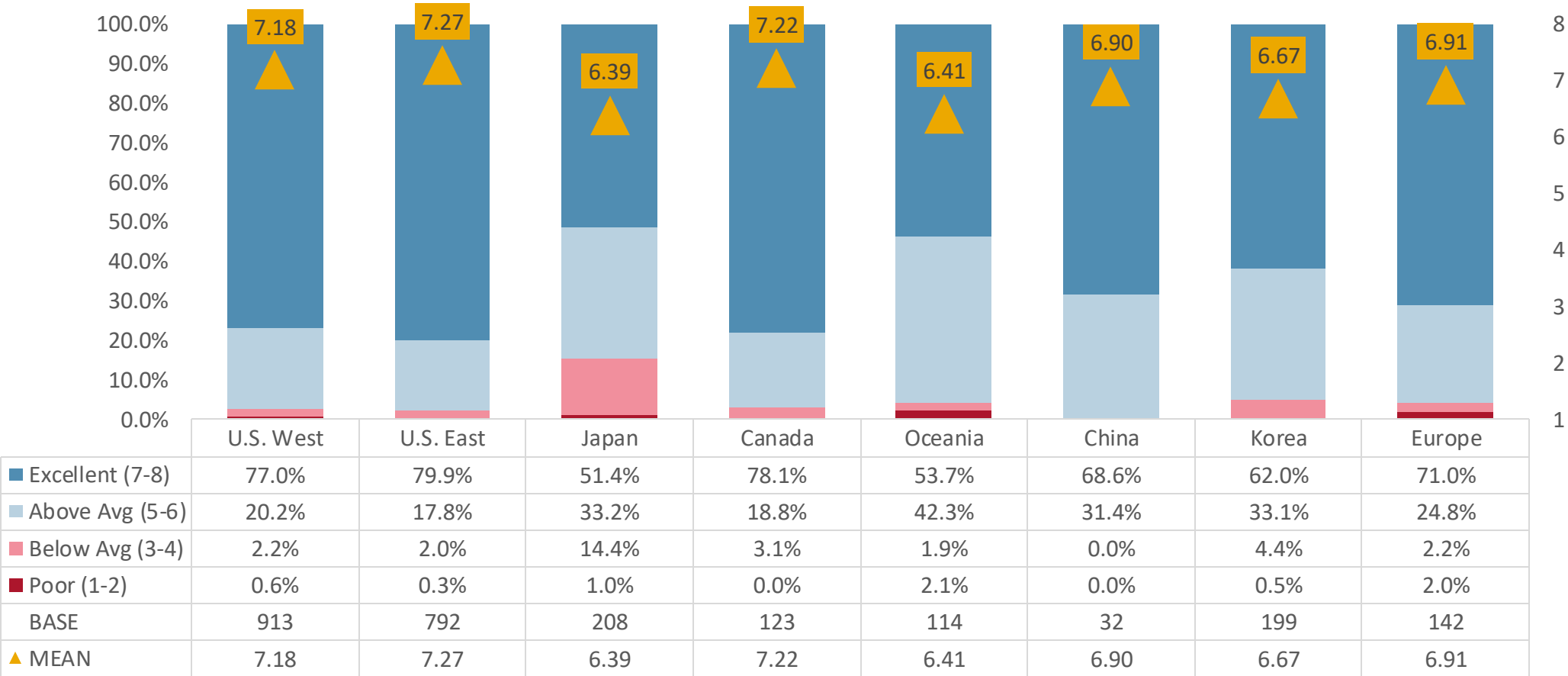


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CULTURAL EXPERIENCES – O’AHU

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

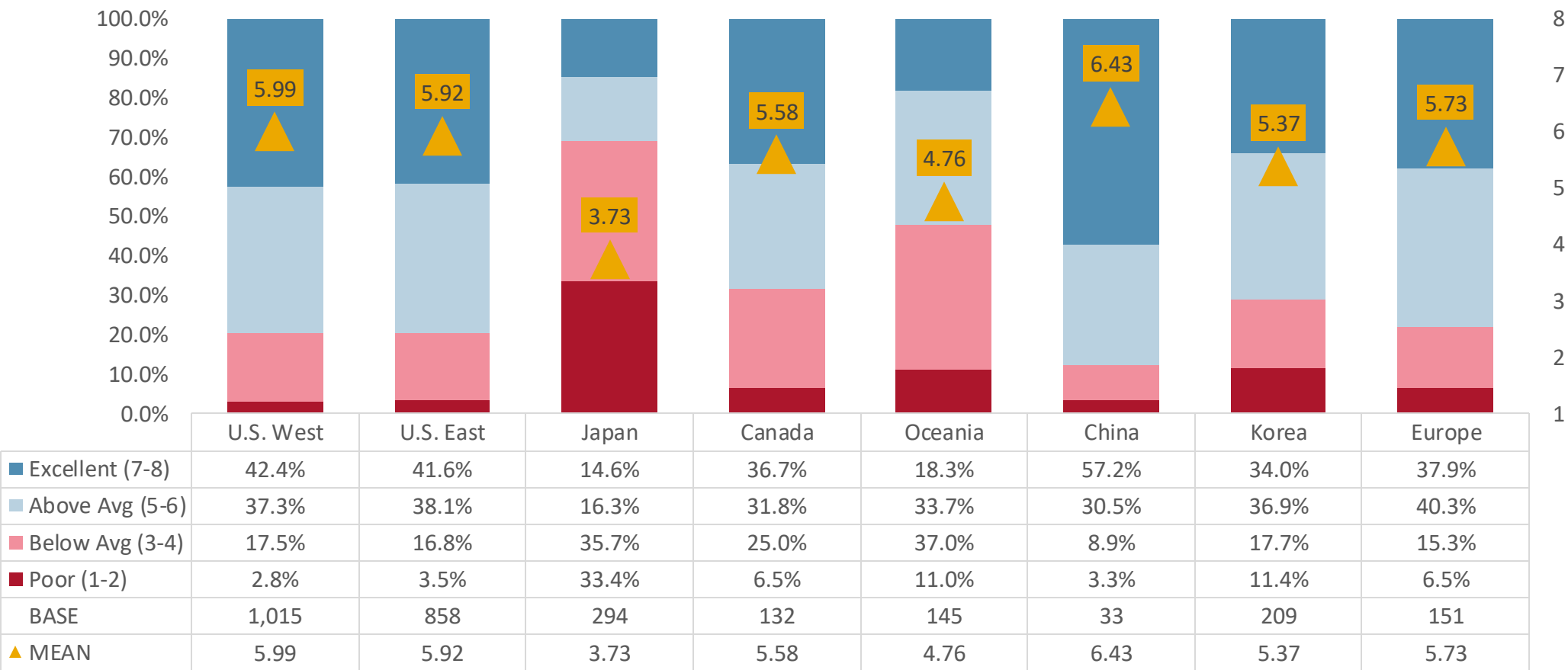


Q. How would you rate the following aspects of your most recent visit to O’ahu?



OVERALL VALUE FOR THE MONEY – O’AHU

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



Q. How would you rate the following aspects of your most recent visit to O’ahu?



MAHALO NUI LOA

From Anthology FINN Partners