

2007 Hawai'i State Parks Survey

Prepared for:



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Primary Objectives

- **To estimate the number of people who use/ visit State Parks.**
- **To identify park user mix by point of origin.**
 - **Hawai'i**
 - **Mainland**
 - **Japan**
 - **Other**
- **To evaluate behavior and attitudes, especially satisfaction**

Sample Plan

- Visits vary by day of week, time of day
- Each park visited at least multiple times

ISLAND	COUNTS
All	Light = 1 – 2 visits/ month
O‘AHU	Heavy = 3 visits/ month
HAWAI‘I ISLAND	Heavy = 3 visits/ month
MAUI	Heavy = 3 visits/ month
KAUA‘I	Heavy = 3 visits/ month

- 7,700 Completed questionnaires

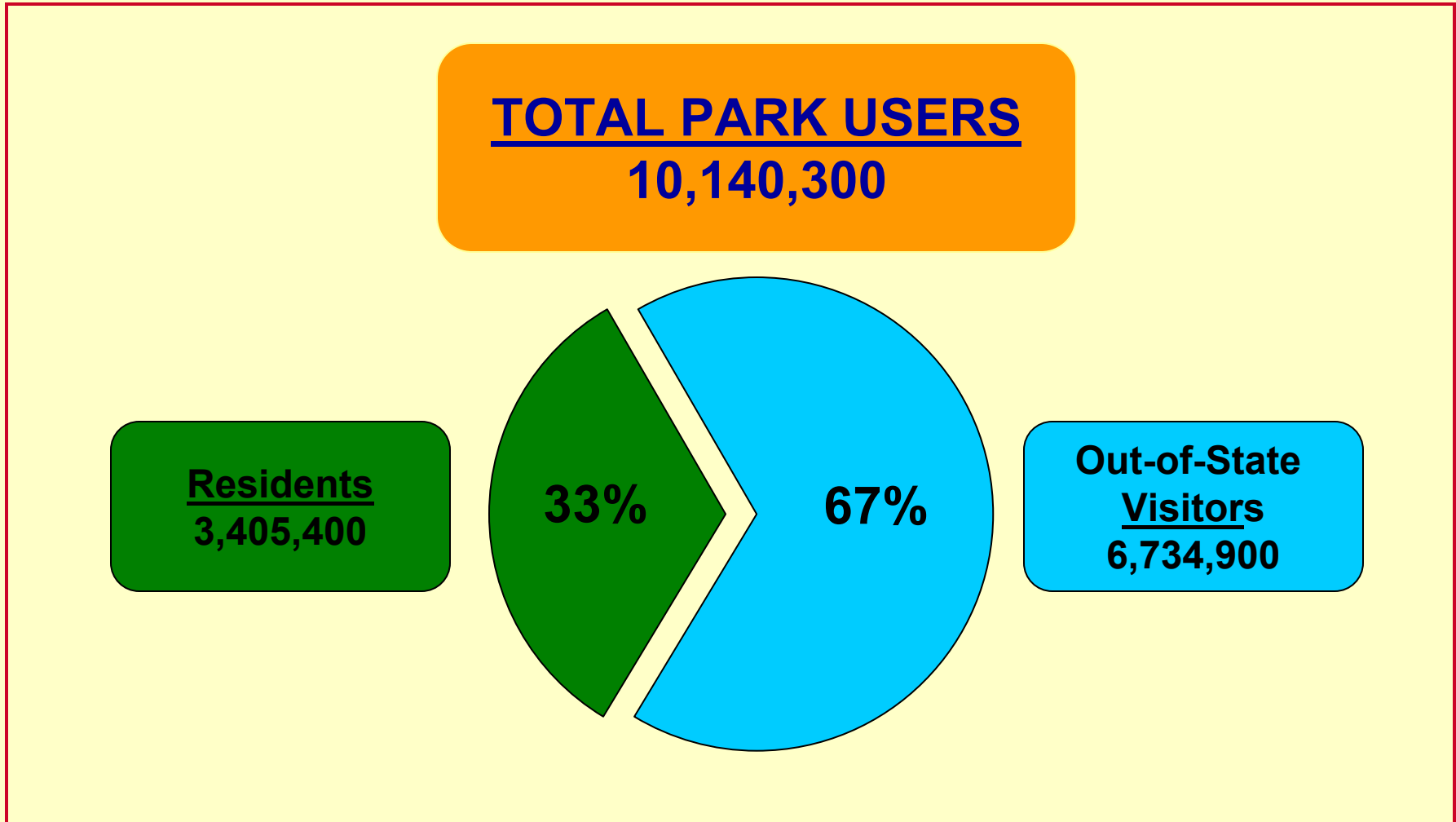
Methodology

- **Field work period reporting: July 7, 2007 to October 31, 2007.**
- **In-person counts of park users.**
- **In-person distribution and collection of self-administered surveys.**
- **In-person audit of facility during first visit.**
- **The 2007 methodology incorporated enhancements to the 2003 benchmark methodology. Specific changes this year included the following:**
 - **Counts were conducted at multiple points in large parks**
 - **Where security was an issue in 2003, car counts rather than individual user counts were implemented.**
- **Because of these methodological enhancements, comparisons of volume in 2007 cannot be made with 2003 for some parks because it would not represent an “apple-to-apple” comparison. These parks hence show only 2007 volume estimates and are marked with an asterisk.**

PARK UTILIZATION

Total Park User Counts (2007)

An estimated 10.1 million people visit Hawai'i State Parks in a year. Of this total, two thirds are out-of-state visitors and one third are residents.

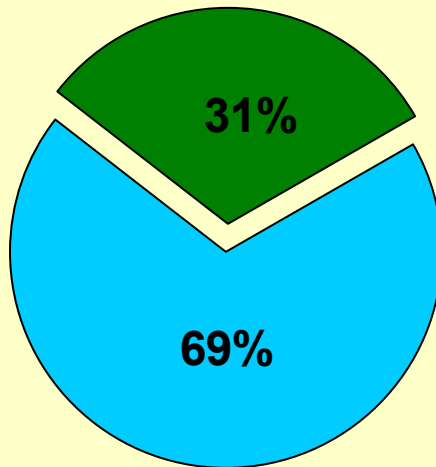


Total Park User Counts (Tracking)

Since 2003, the volume of State Park users has increased 10%. Resident usage has grown faster than visitor usage at 17% vs. 7% respectively. That said, out-of-state visitors continue to represent 2 in 3 users.

2003
TOTAL PARK USERS
9,176,350

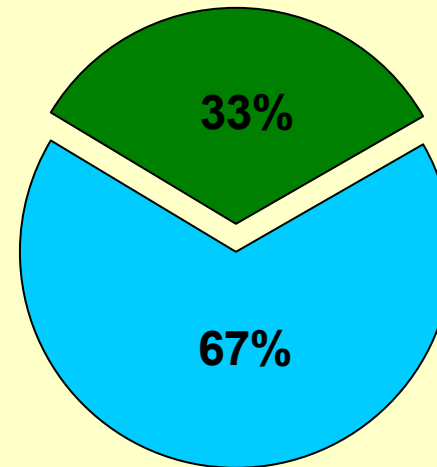
Residents
2,877,050



Out-of-State Visitors
6,299,300

2007
TOTAL PARK USERS
10,140,300

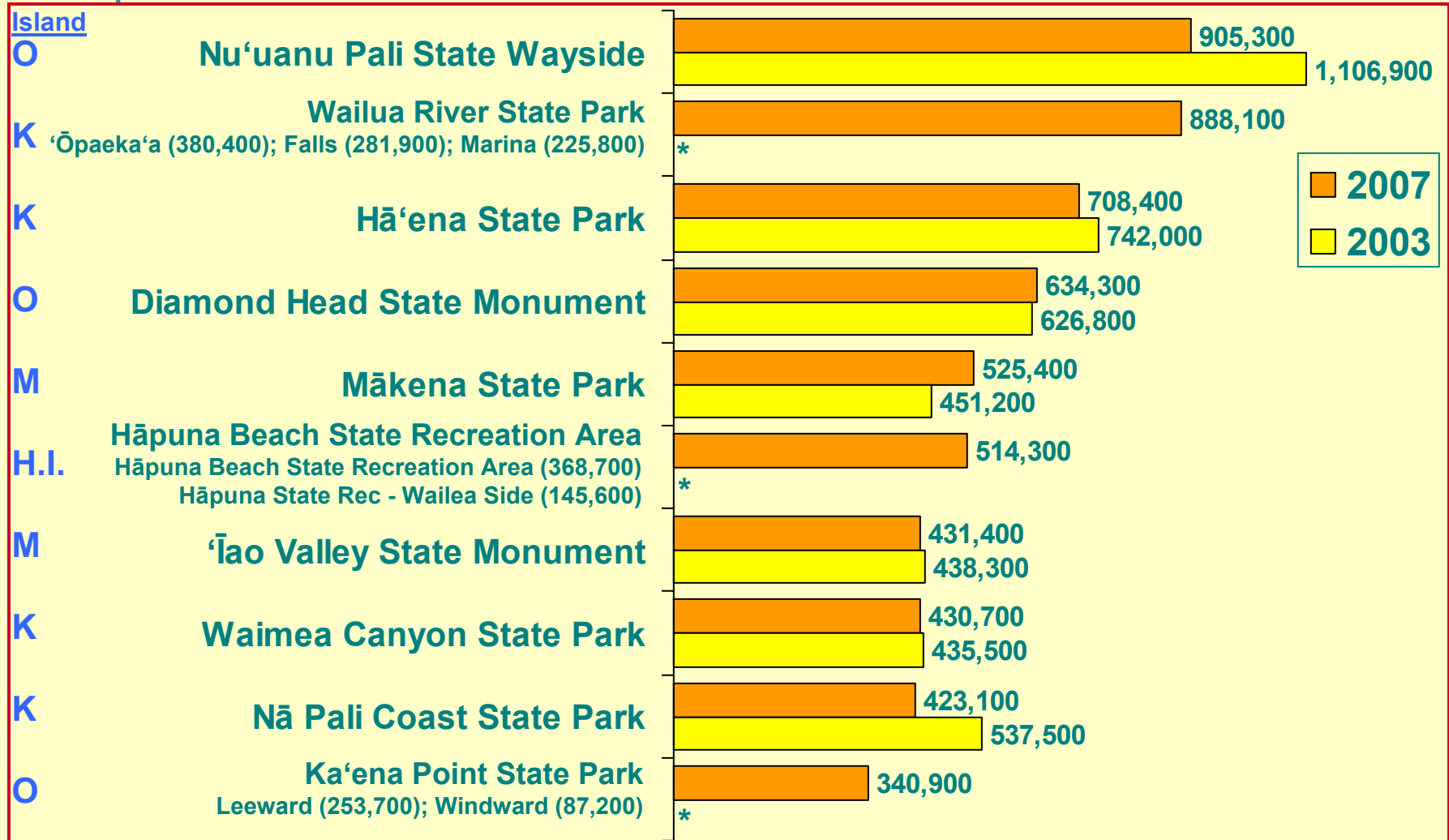
Residents
3,405,400



Out-of-State Visitors
6,734,900

Utilization by Park: Tracking (1 of 6)

Despite an 18% decrease in users, Nu‘uanu Pali continues to rank as the highest volume park with over 900,000 annually. Except for the Nā Pali Coast State Park, the five highest volume parks remain the same as in 2003. Mākena, which ranked 6th, has moved into the Top 5. Three out of 5 of the most utilized parks are on Kaua‘i.

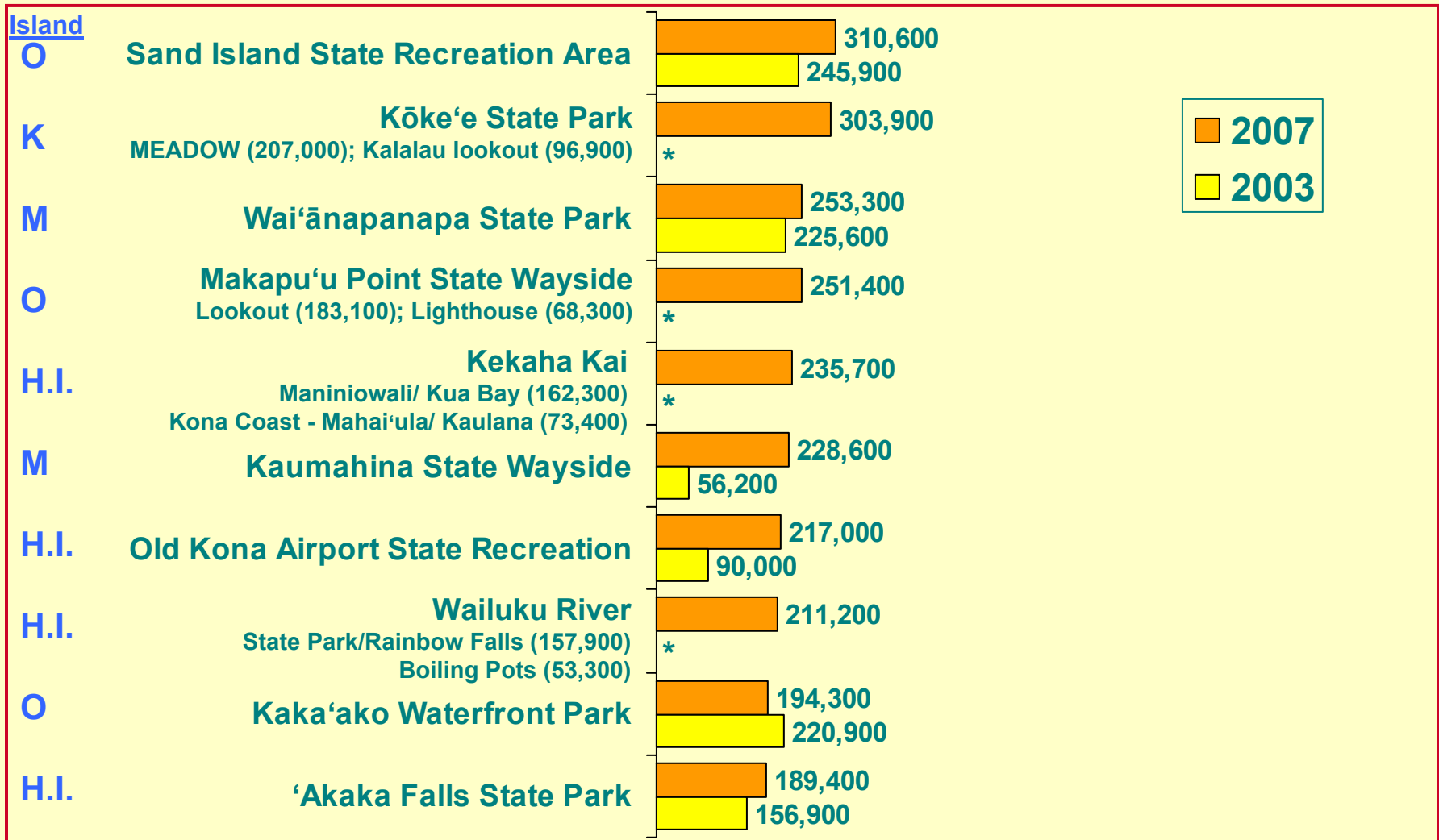


Note: O=O‘ahu, H.I. Hawai‘i Island, M=Maui, K=Kaua‘i

*Because of methodological enhancements, comparisons of volume in 2007 cannot be made with 2003 because it would not represent an “apple-to-apple” comparison.

Utilization by Park: Tracking (2 of 6)

The top 10 parks in volume likewise rank similarly to 2003. Two exceptions are parks where 2007 counts were undertaken at more locations to increase accuracy: Hāpuna, moved from 29th to 6th and Ka'ena Point from 28th to 10th.

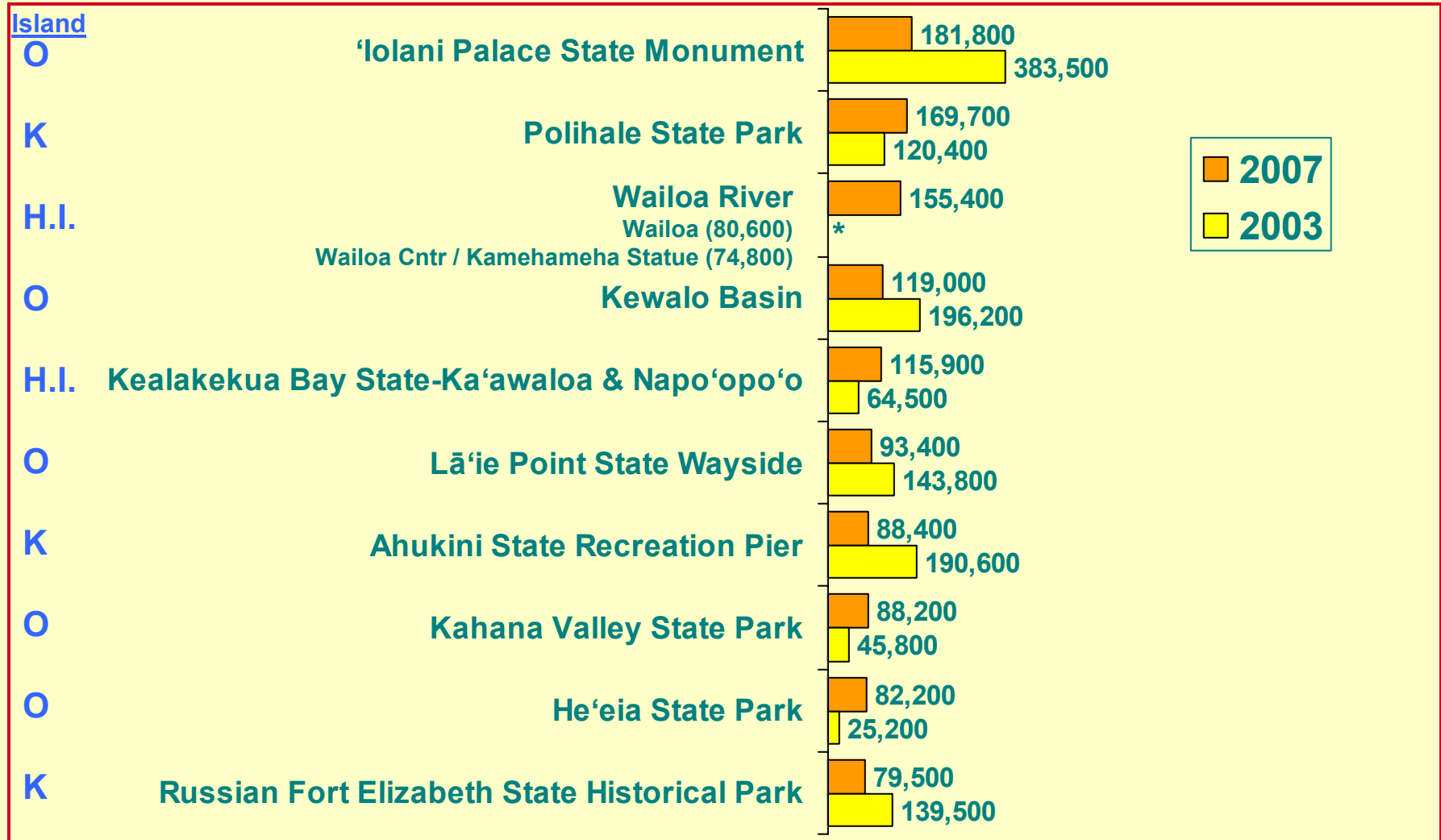


Note: O=O'ahu, H.I. Hawai'i Island, M=Maui, K=Kaua'i

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Utilization by Park: Tracking (3 of 6)

Within the top 20 parks, additional counting locations resulted in higher volume for Makapuu, Kekaha Kai, Wailuku and Old Kona Airport. Kaumahina's new restroom made it a popular stop.



Note: O=O'ahu, H.I. Hawai'i Island, M=Maui, K=Kaua'i

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Utilization by Park: Tracking (4 of 6)

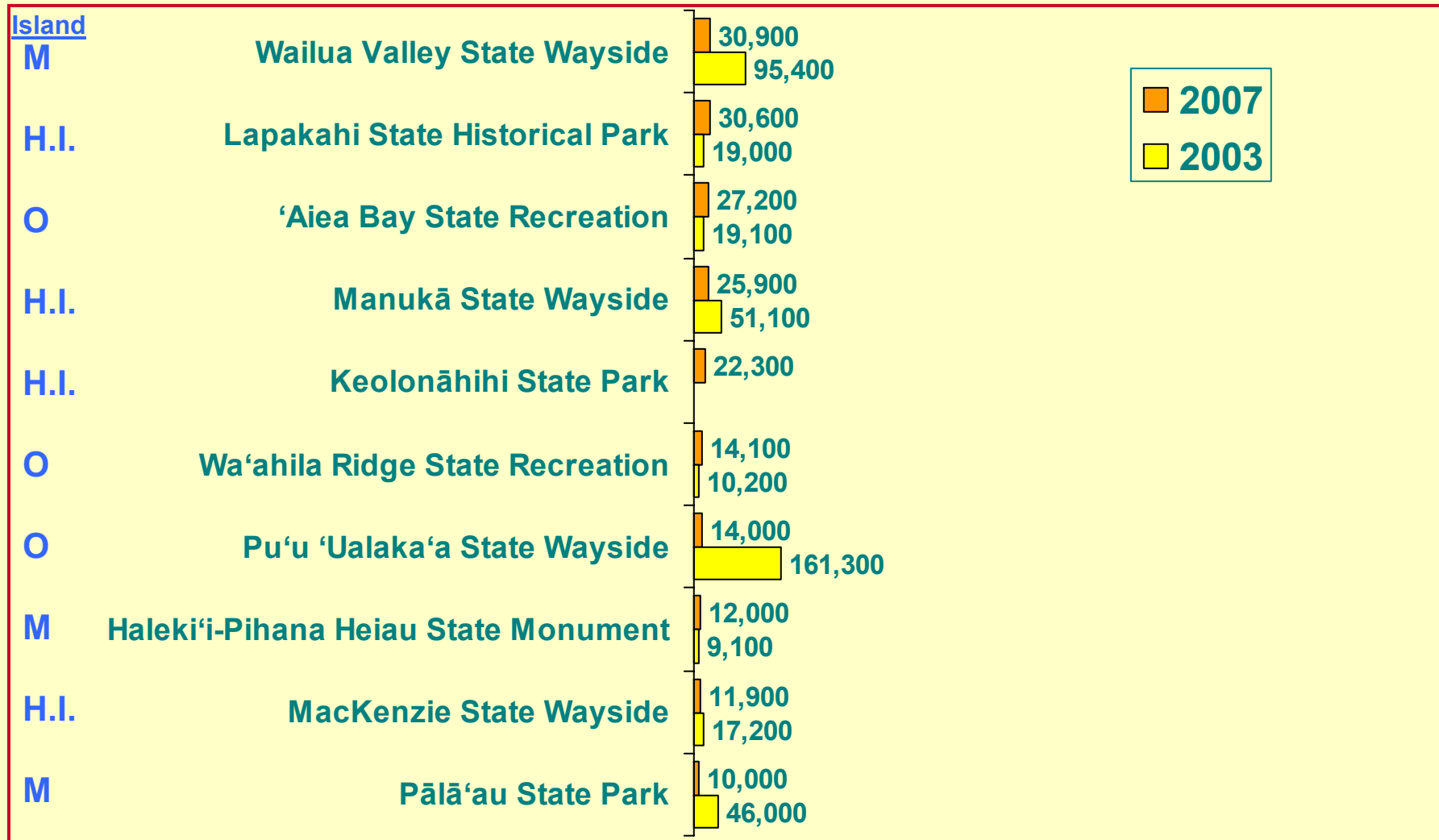
Enhanced counting methods eliminated walk-throughs at 'Iolani Palace and pier users at Kewalo Basin, and included kayakers at Kealakekua. In contrast to 2003, Ahukini did not benefit from large 'oama runs.



Note: O=O'ahu, H.I. Hawai'i Island, M=Maui, K=Kaua'i

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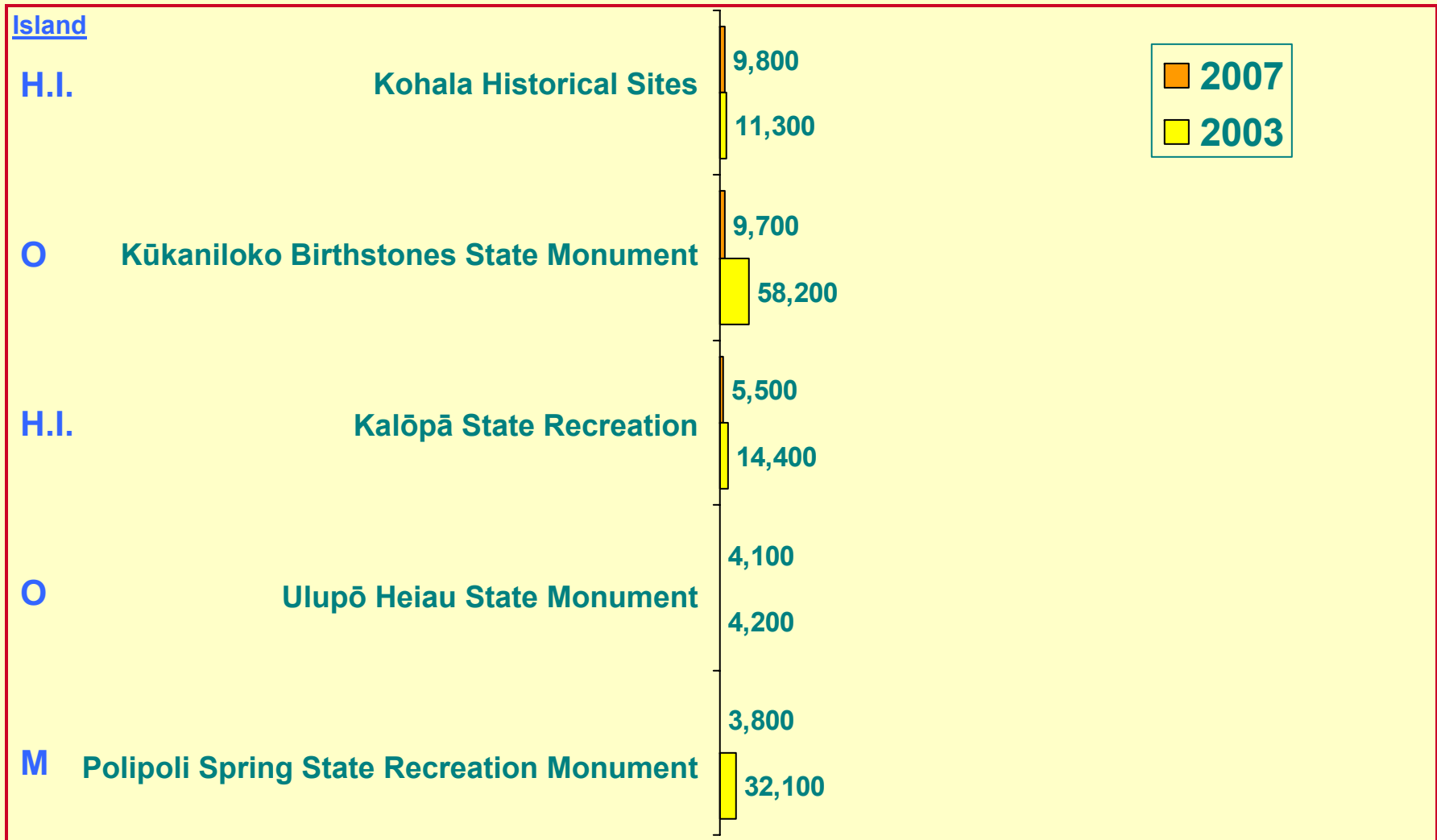
Utilization by Park: Tracking (5 of 6)



Note: O=O'ahu, H.I. Hawai'i Island, M=Maui, K=Kaua'i

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Utilization by Park: Tracking (6 of 6)



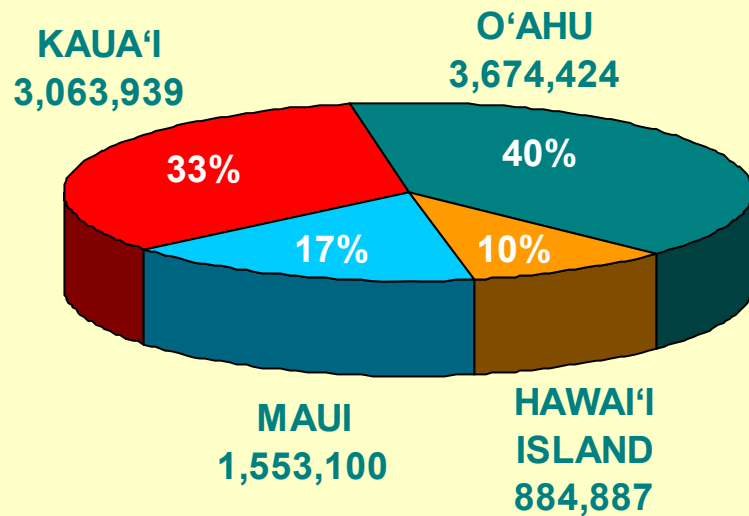
Note: O=O'ahu, H.I. Hawai'i Island, M=Maui, K=Kaua'i

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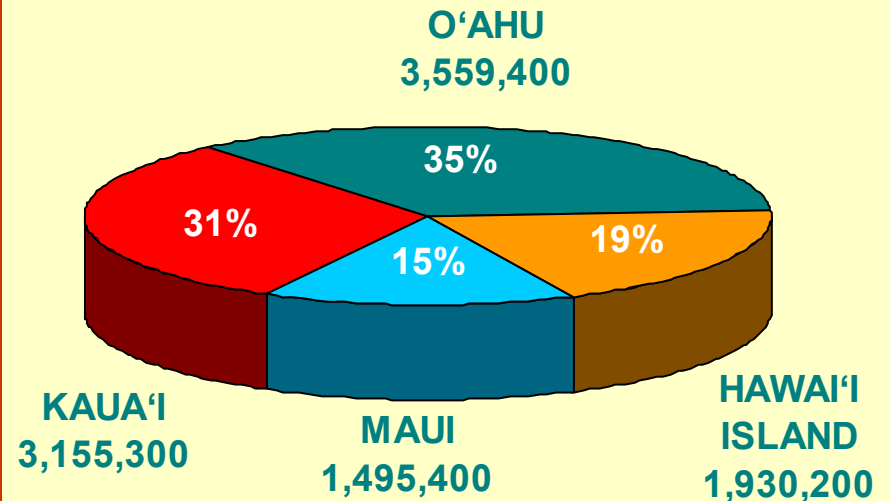
Share of Park Users (By Island): Tracking

In contrast to the other three Islands, Hawai'i Island's share of park users doubled, driven by refinement in methodology with more parks with multiple location counting. Although Kaua'i's volume increased 3%, its share slipped 2 points. O'ahu and Maui each show a 4% decline in park users resulting in a -5 point drop in share for O'ahu and -2 points for Maui.

2003



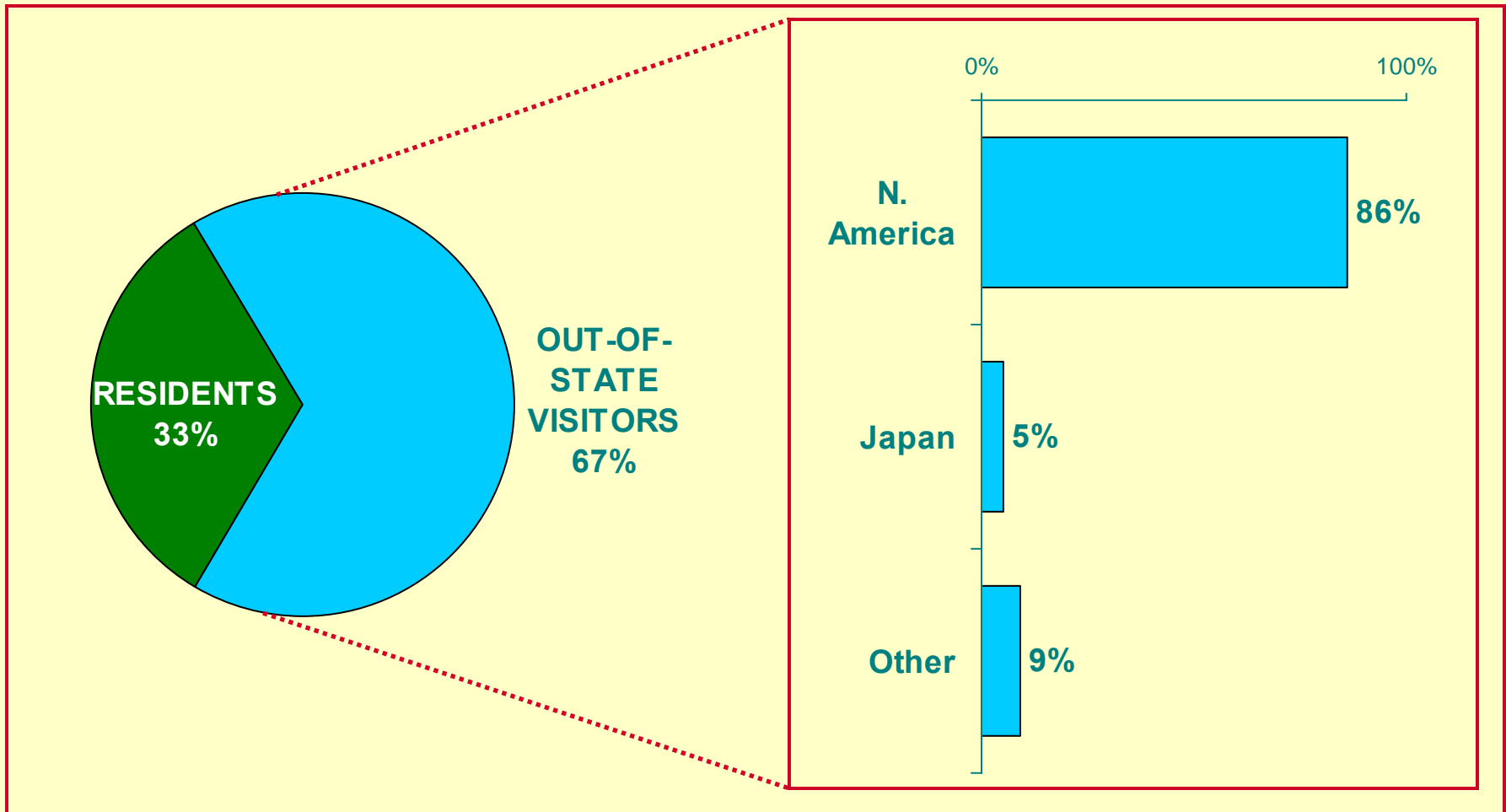
2007



PARK USER MIX

Statewide User Mix (2007)

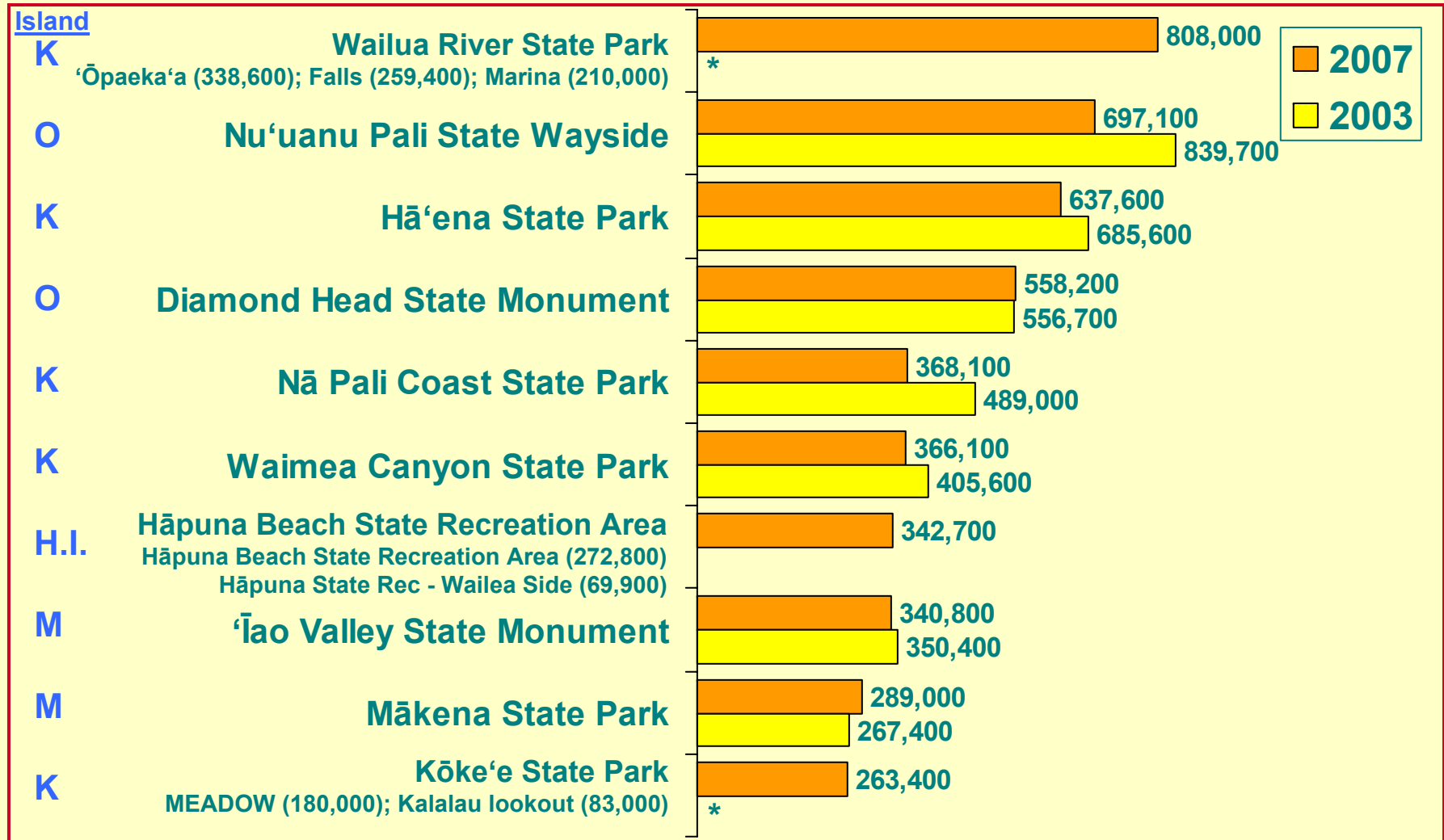
Among out-of-state visitors to Hawaii's park system, almost 9 in 10 are from North America, with only 1 in 7 from other areas. The 2003 mix is virtually identical with 87% from North America and 13% from elsewhere.



Base: Total (7,700)
Q1: What is your country of residence?

Park Utilization By Out-of-State Visitors: Tracking (1 of 6)

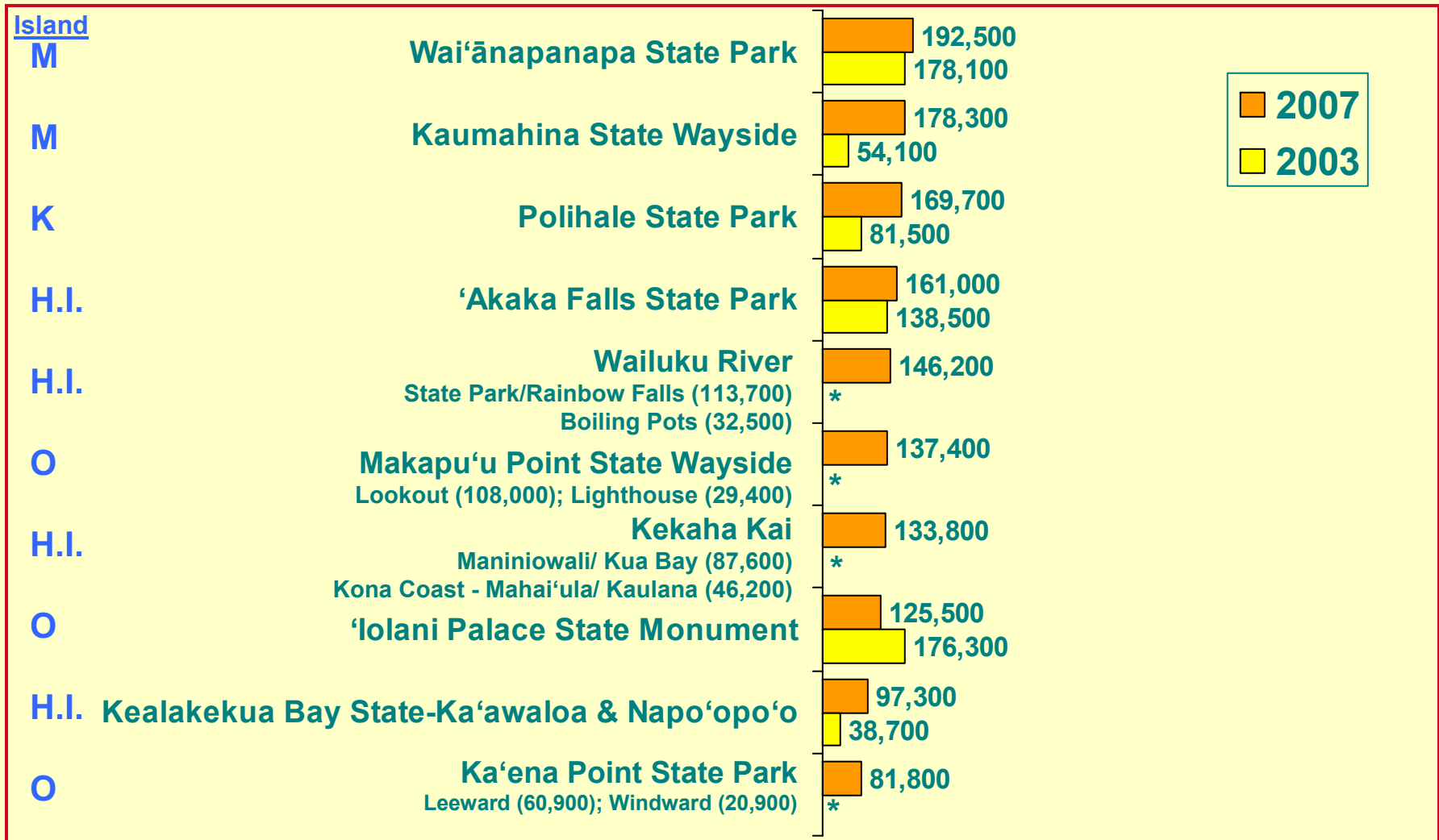
In terms of out-of-state visitors usage, the top six parks are on Kaua'i and O'ahu. The highest usage is Wailua River, with more than 800,000 users, followed by Nu'uuanu Pali and Hā'ena with more than 600,000 users.



Note: O=O'ahu, H.I. Hawai'i Island, M=Maui, K=Kaua'i

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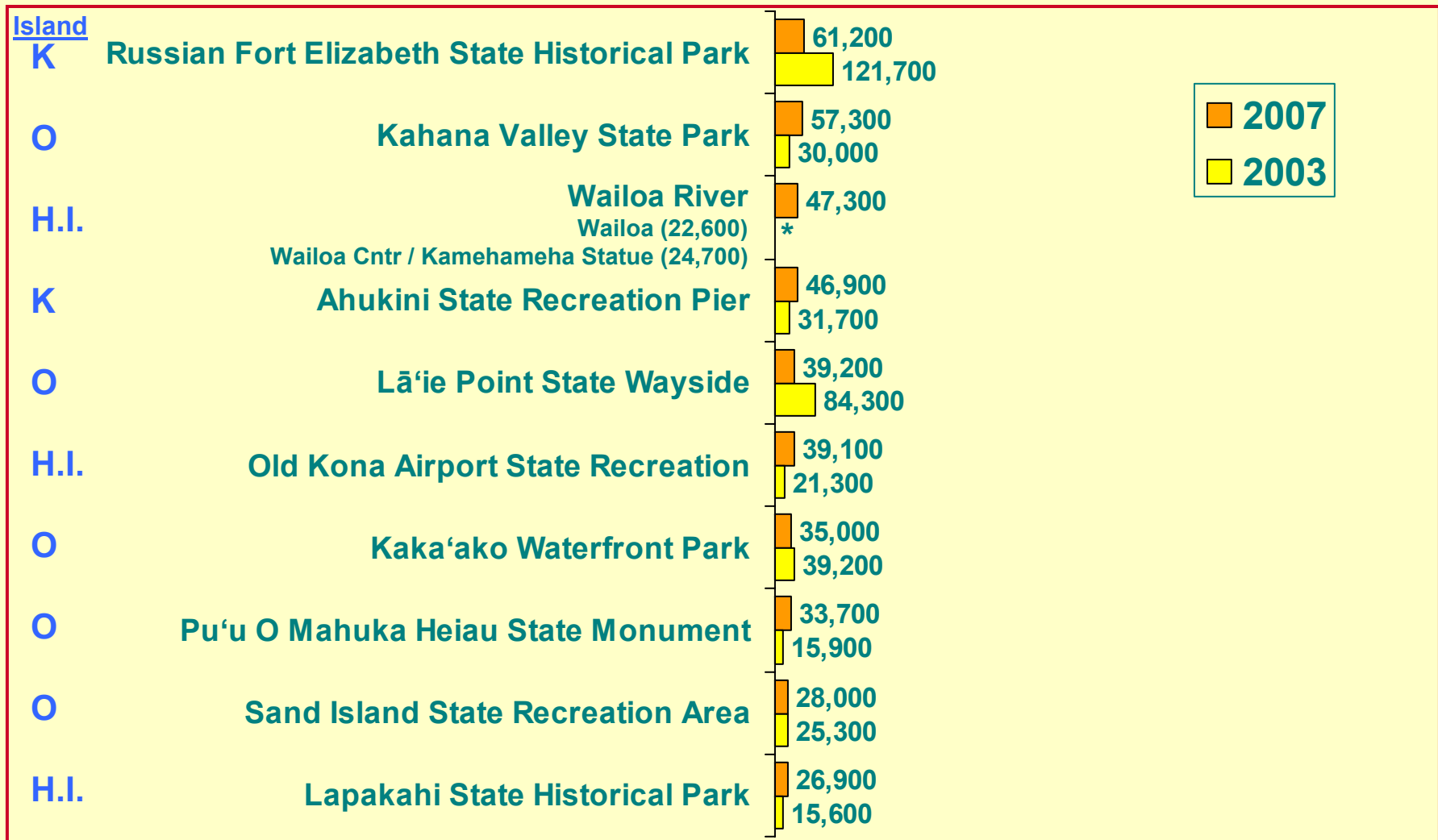
Park Utilization By Out-of-State Visitors: Tracking (2 of 6)



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Park Utilization By Out-of-State Visitors: Tracking (3 of 6)



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Park Utilization By Out-of-State Visitors: Tracking (4 of 6)



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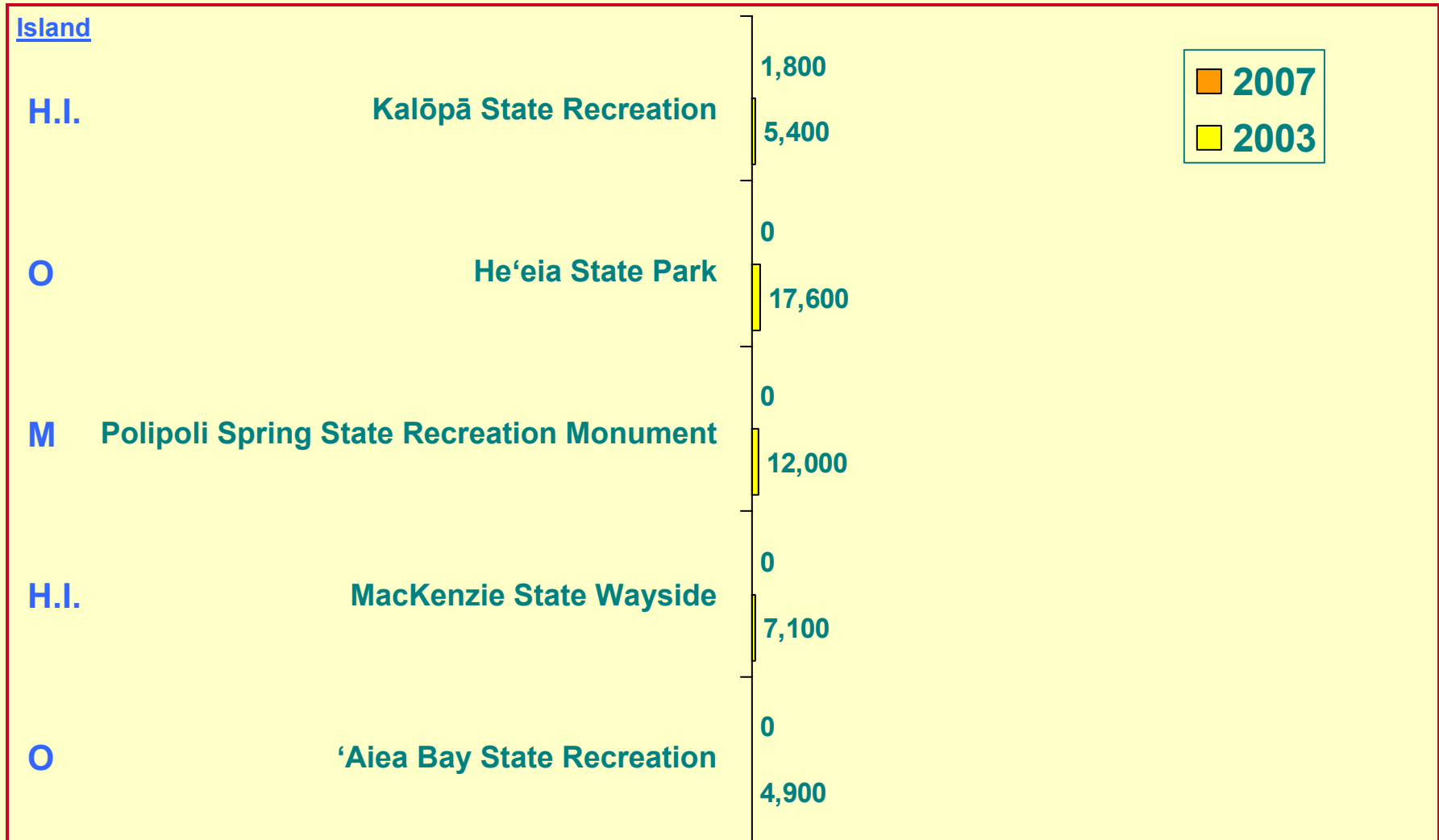
Park Utilization By Out-of-State Visitors: Tracking (5 of 6)



Note: O=O'ahu, H.I. Hawai'i Island, M=Maui, K=Kaua'i

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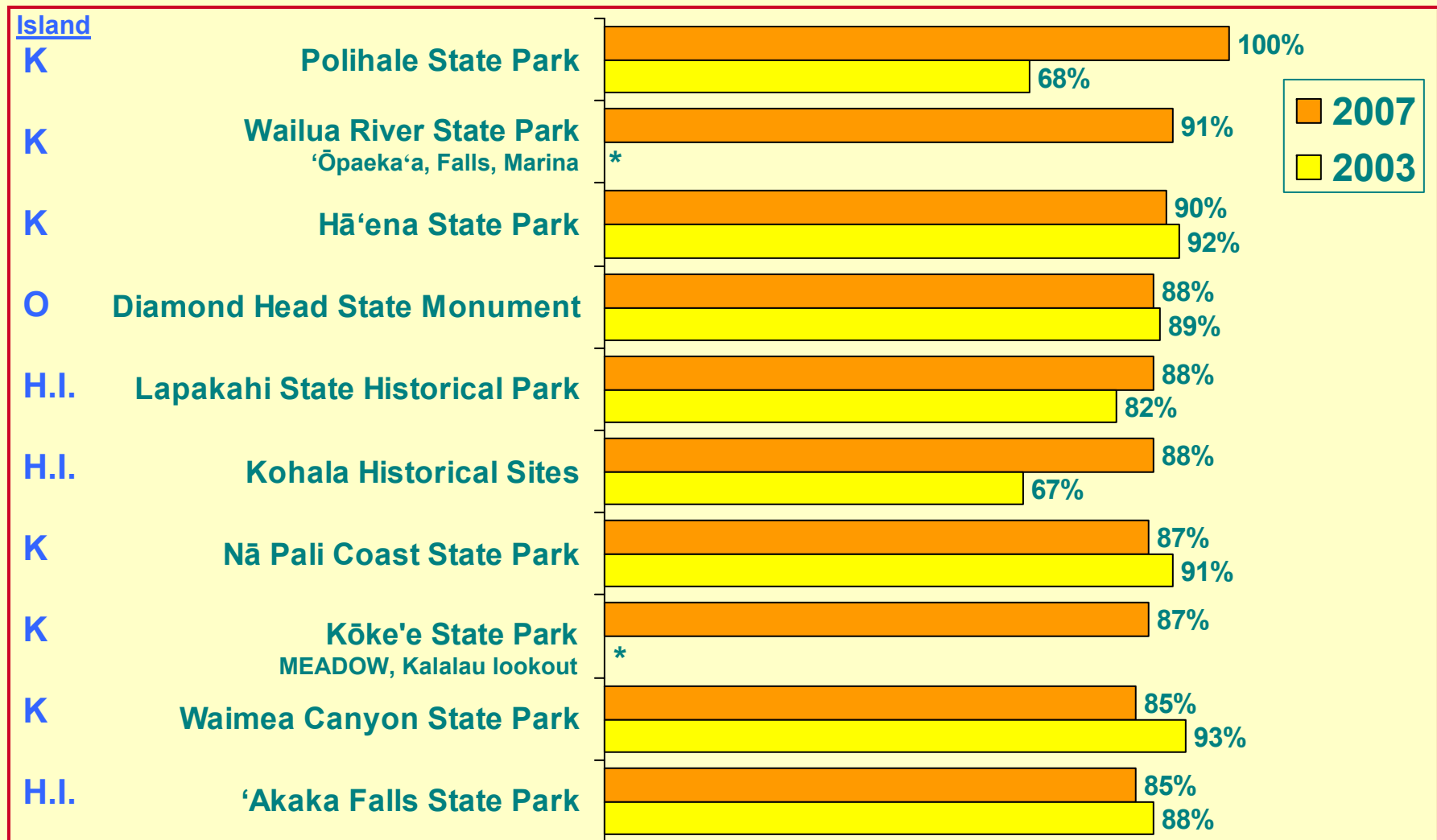
Park Utilization By Out-of-State Visitors: Tracking (6 of 6)



Note: O=O'ahu, H.I. Hawai'i Island, M=Maui, K=Kaua'i

*Because of methodological enhancements, comparisons of volume in 2007 cannot be made with 2003 because it would not represent an "apple-to-apple" comparison.

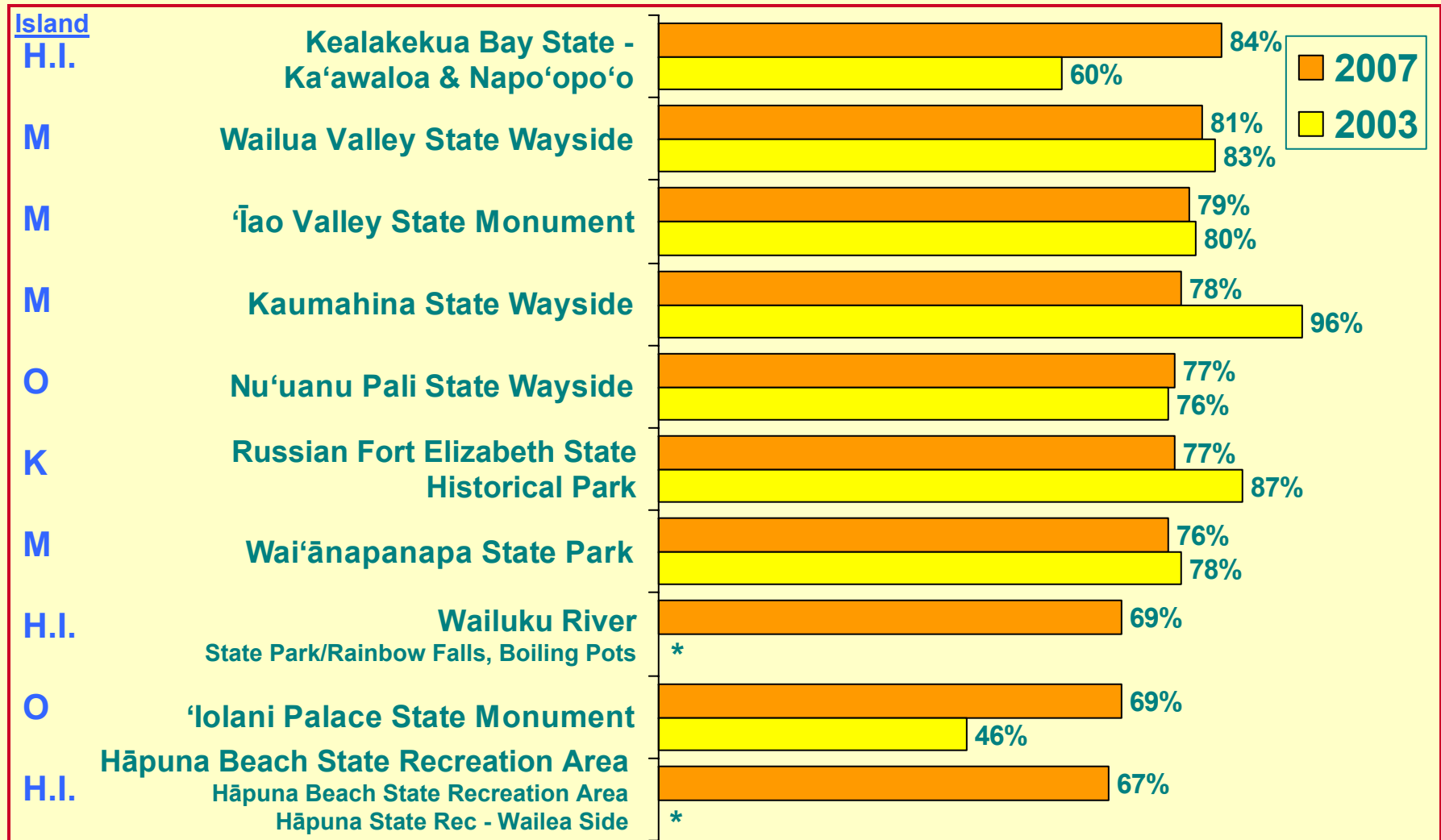
% of Park Utilization By Out-of-State Visitors: Tracking (1 of 6)



Note: O=O'ahu, H.I. Hawai'i Island, M=Maui, K=Kaua'i

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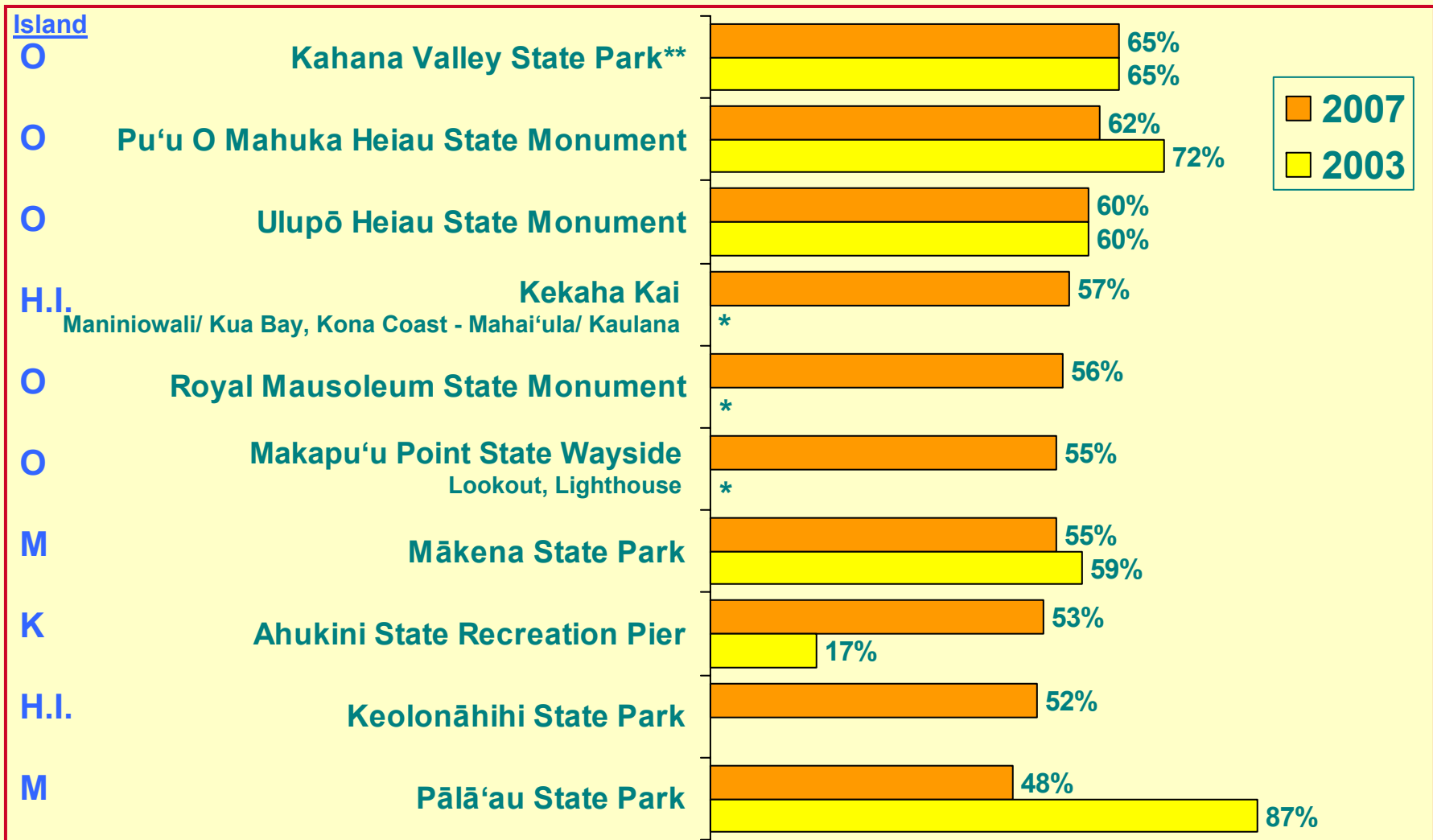
% of Park Utilization By Out-of-State Visitors: Tracking (2 of 6)



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% of Park Utilization By Out-of-State Visitors: Tracking (3 of 6)

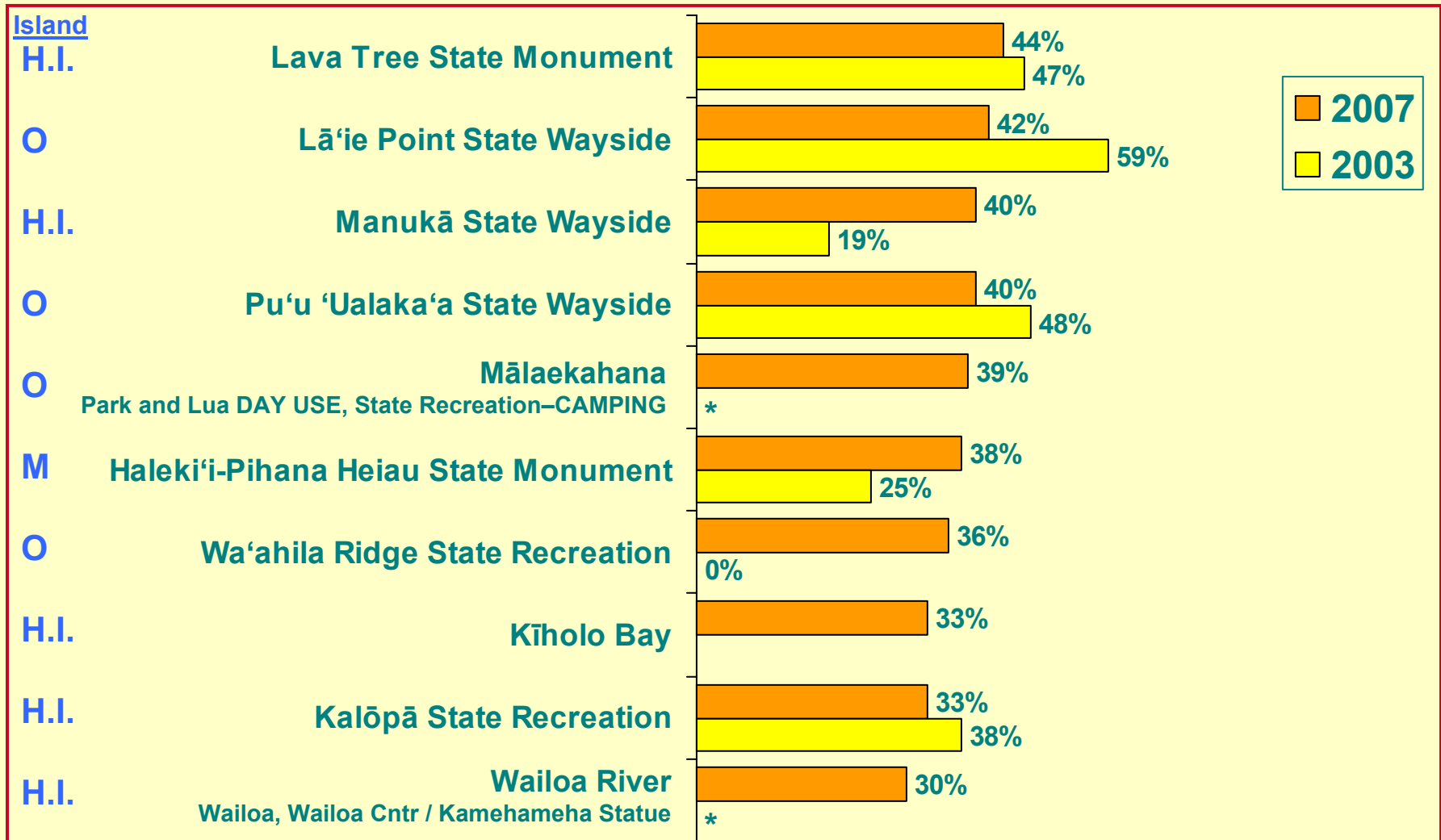


Note: O=O'ahu, H.I. Hawai'i Island, M=Maui, K=Kaua'i

**Car count park, use 2003 percentage of out-of-state visitors

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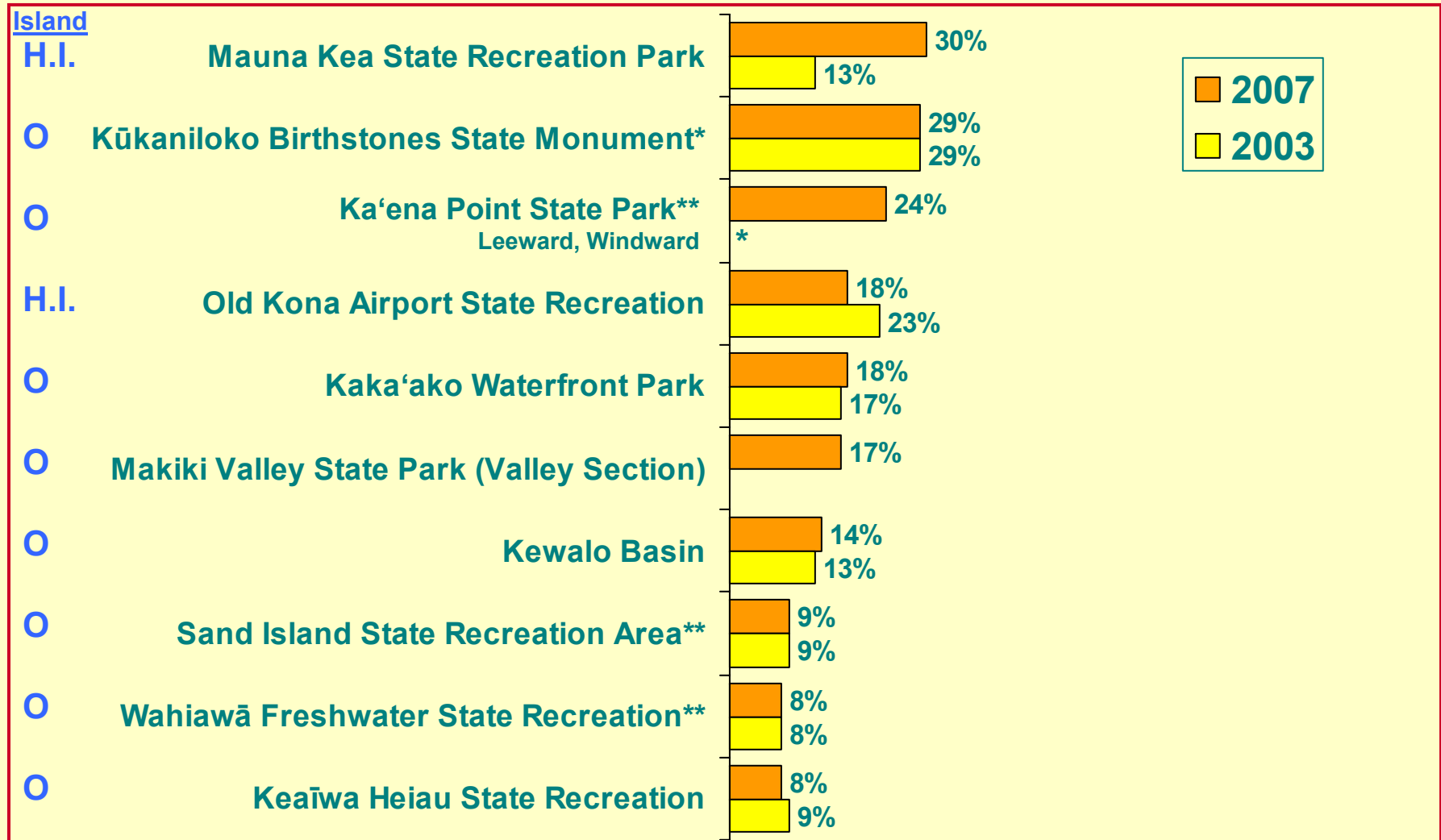
% of Park Utilization By Out-of-State Visitors: Tracking (4 of 6)



Note: O=O'ahu, H.I. Hawai'i Island, M=Maui, K=Kaua'i

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% of Park Utilization By Out-of-State Visitors: Tracking (5 of 6)

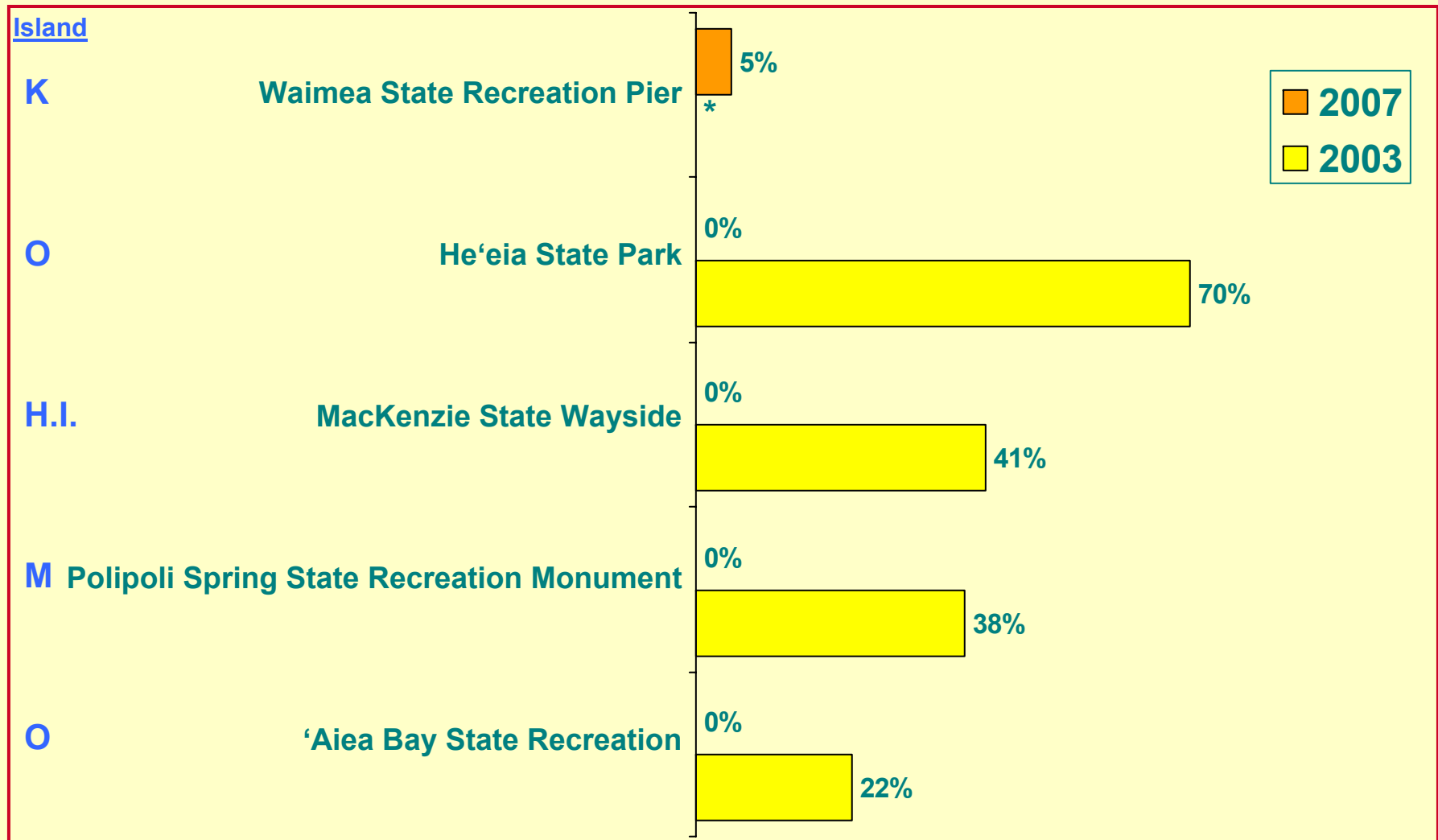


Note: O=O'ahu, H.I. Hawai'i Island, M=Maui, K=Kauai

**Car count park, use 2003 percentage of out-of-state visitors

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% of Park Utilization By Out-of-State Visitors: Tracking (6 of 6)

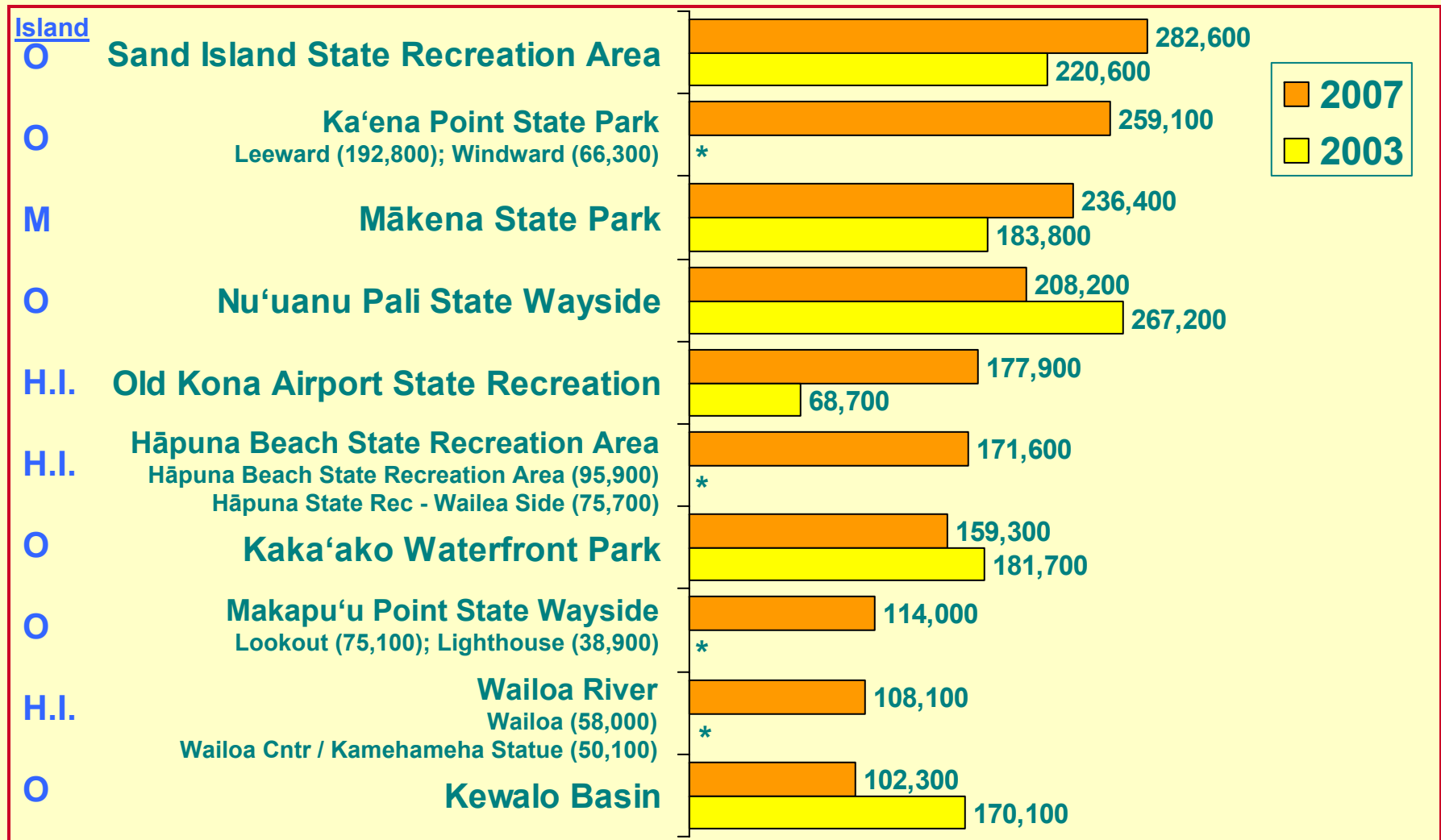


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Park Utilization By Residents: Tracking (1 of 6)

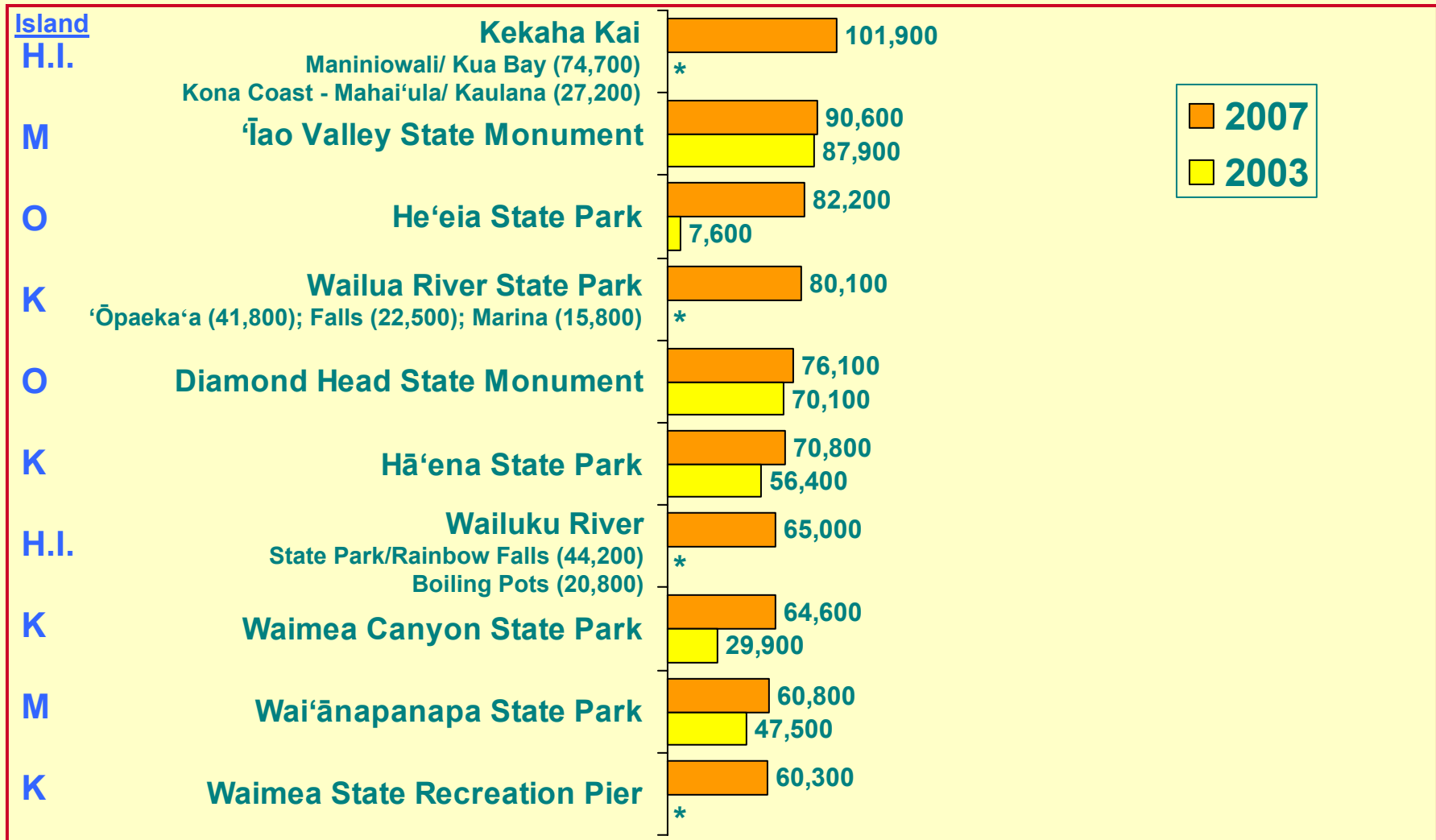
In terms of residential usage, 2 of the 3 top parks are on O‘ahu, with more than a quarter million users per year.



Note: O=O‘ahu, H.I. Hawai‘i Island, M=Maui, K=Kaua‘i

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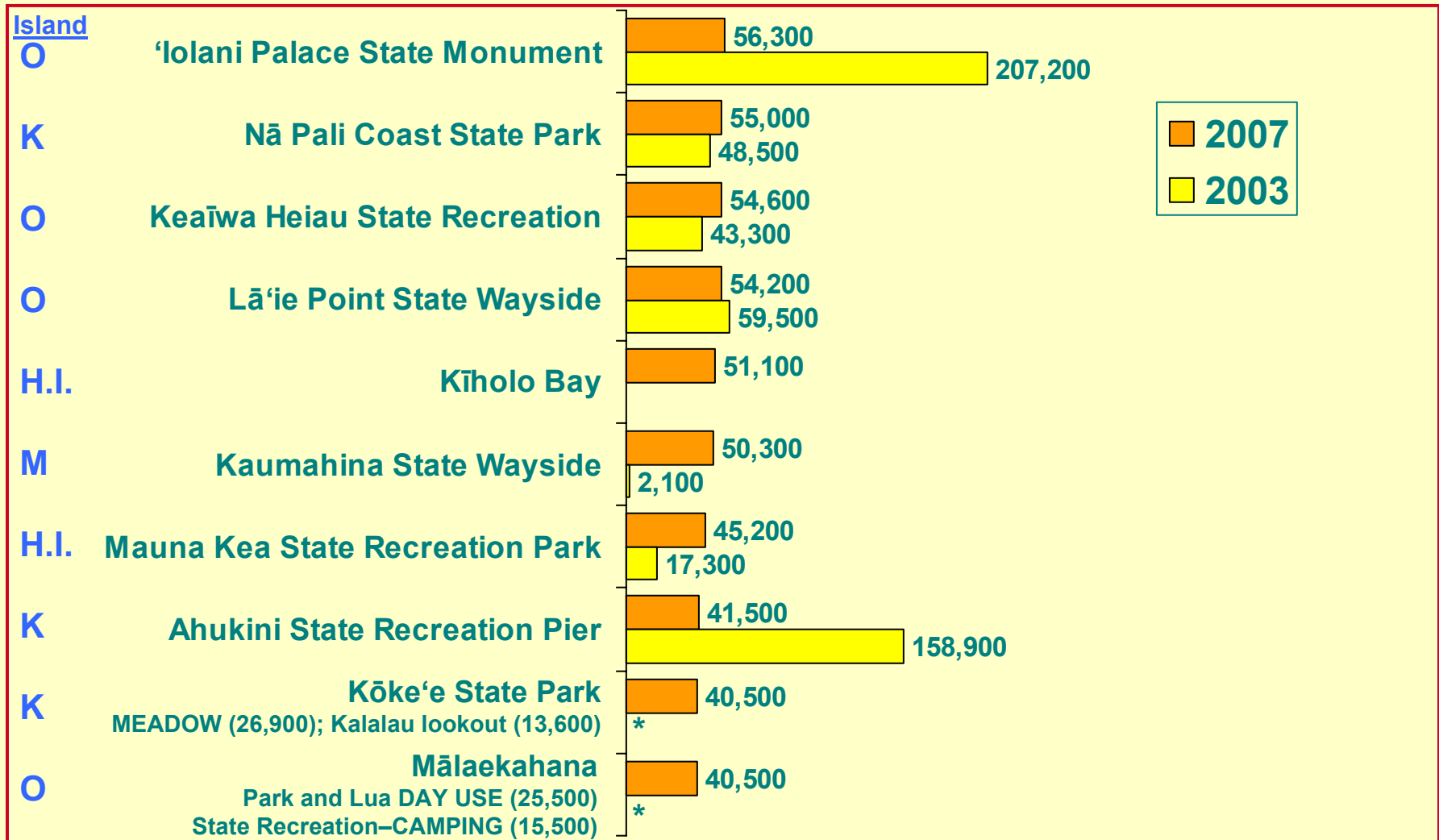
Park Utilization By Residents: Tracking (2 of 6)



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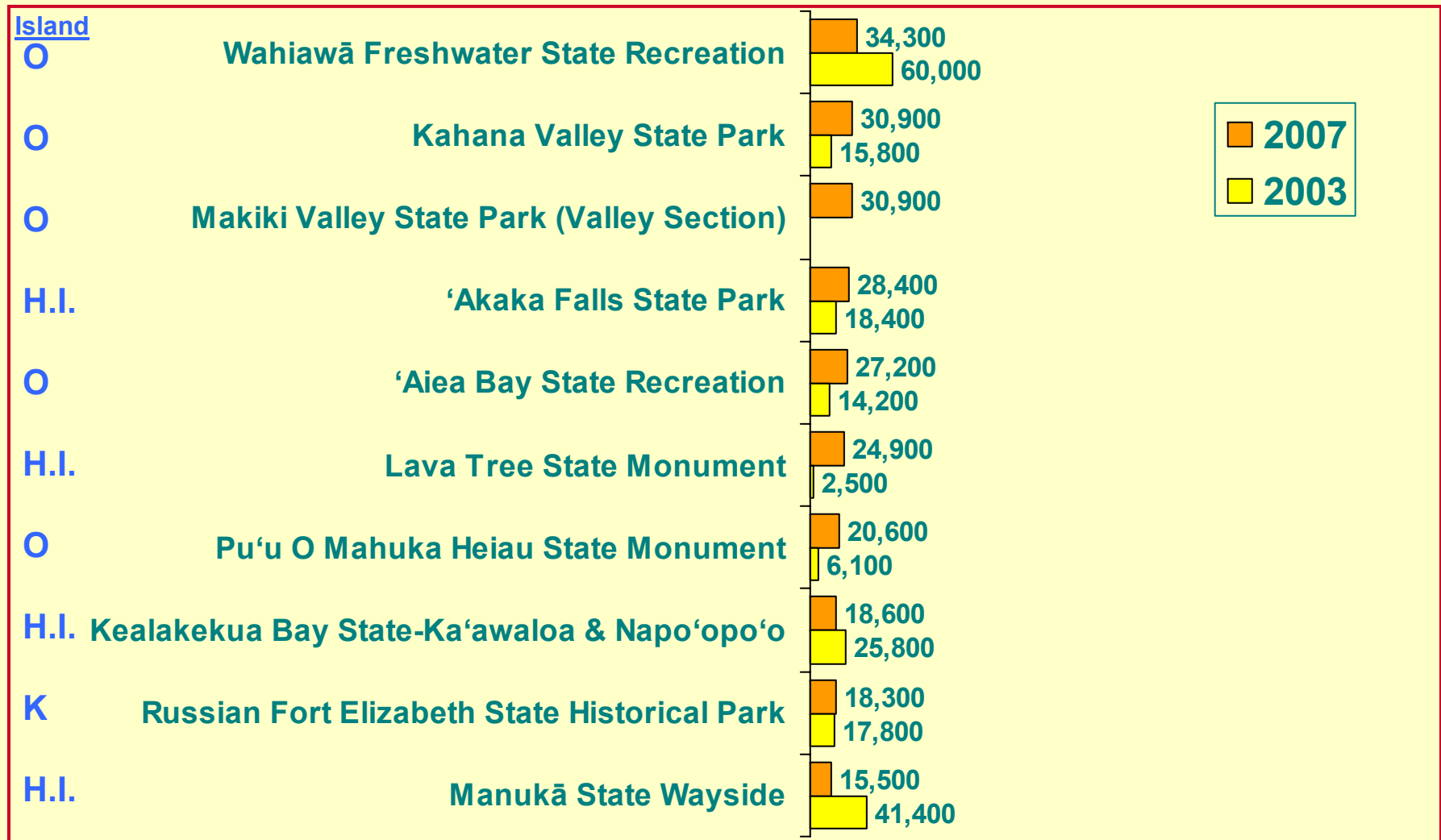
Park Utilization By Residents: Tracking (3 of 6)



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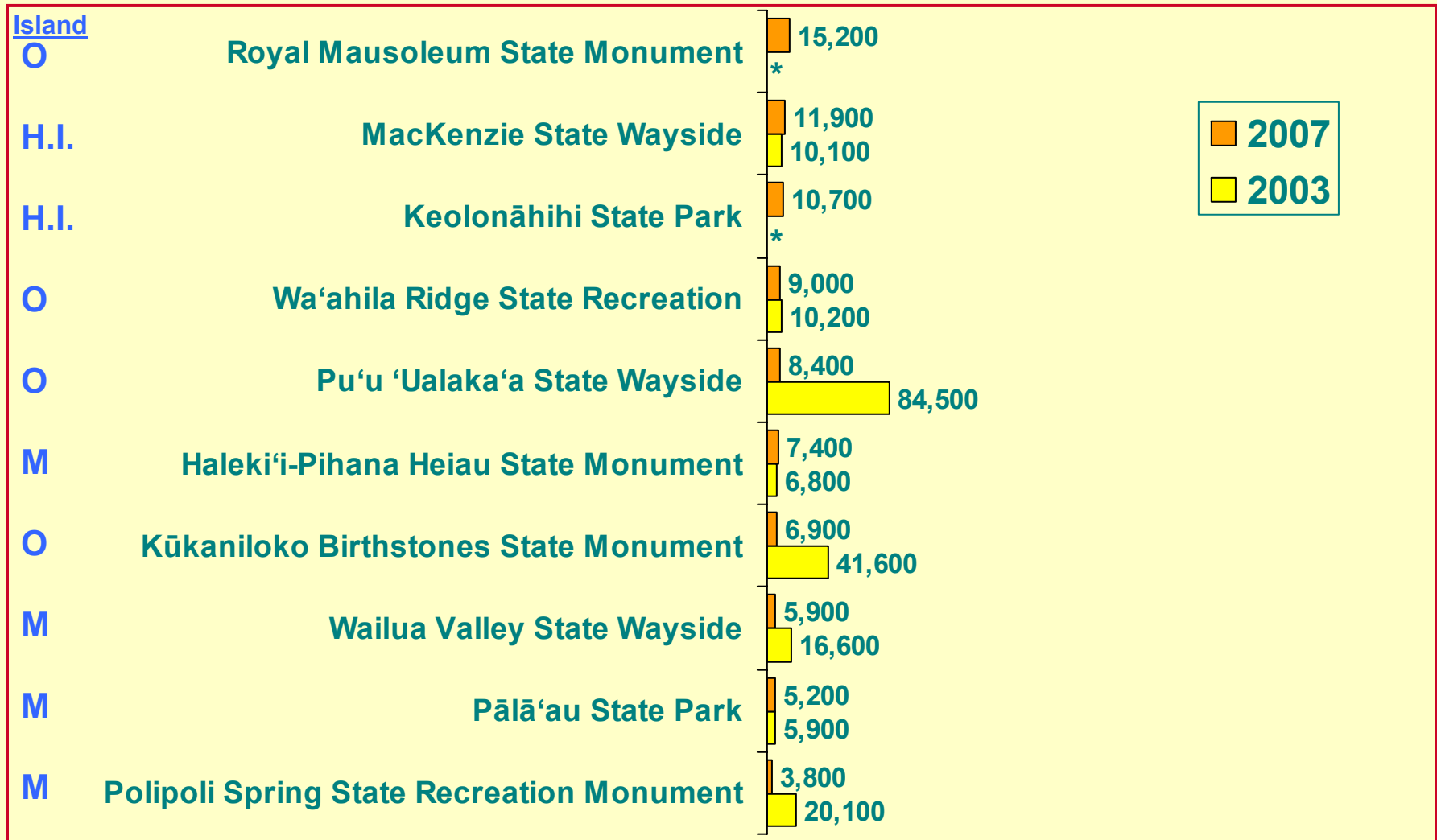
Park Utilization By Residents: Tracking (4 of 6)



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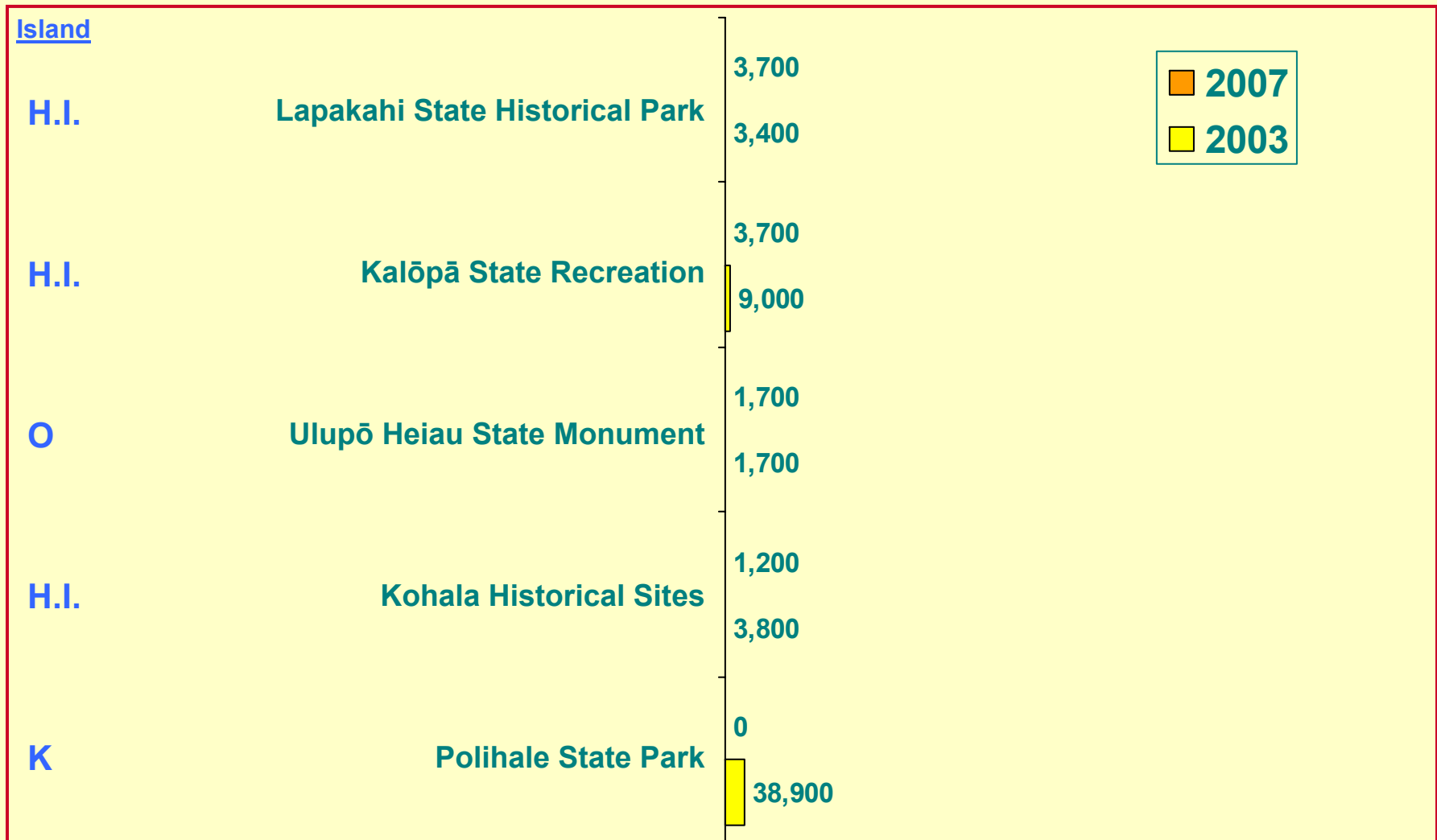
Park Utilization By Residents: Tracking (5 of 6)



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Park Utilization By Residents: Tracking (6 of 6)



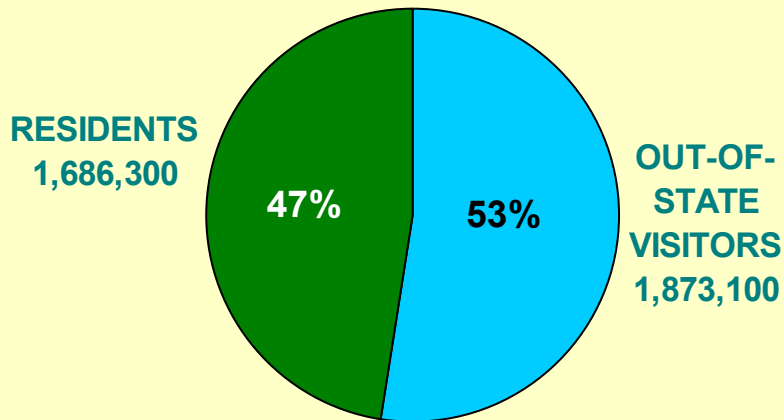
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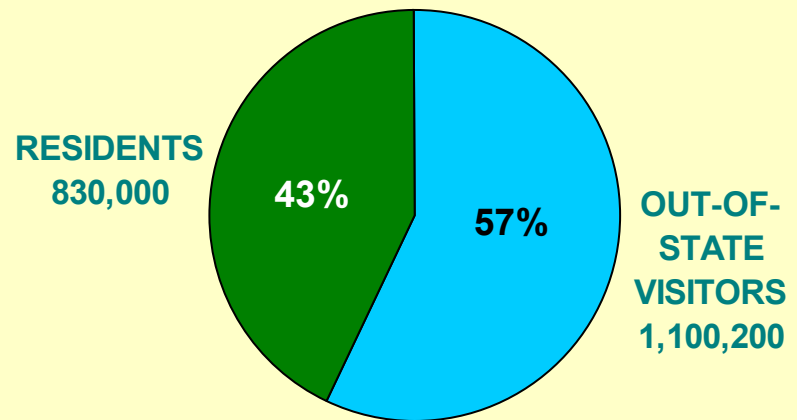
Park User Mix by Island (2007)

Park user mix varies by Island. Although a majority of users on all Islands are non-residents, this percentage is highest on Kaua'i at 86%. Out-of-state visitors comprise 69% of users on Maui, 57% on Hawai'i Island, and 53% on O'ahu.

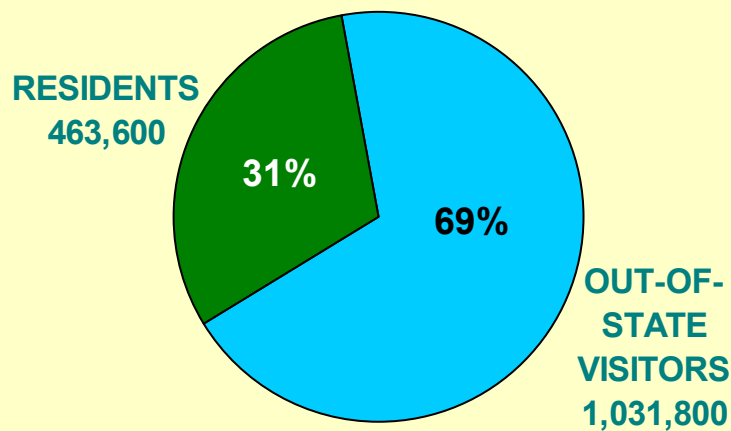
O'AHU



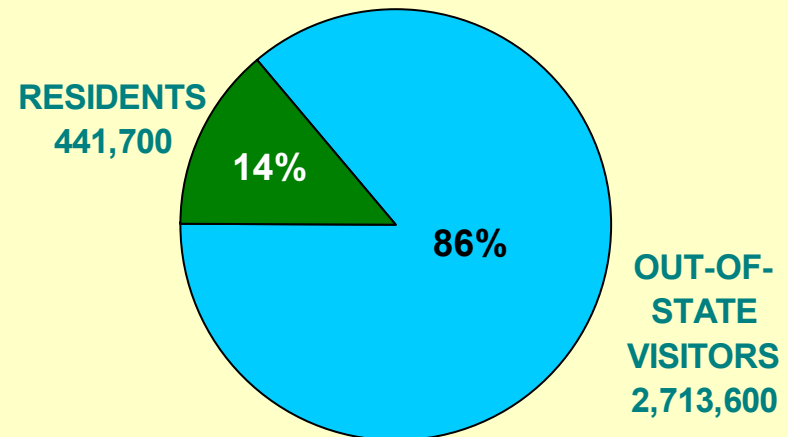
HAWAI'I ISLAND



MAUI

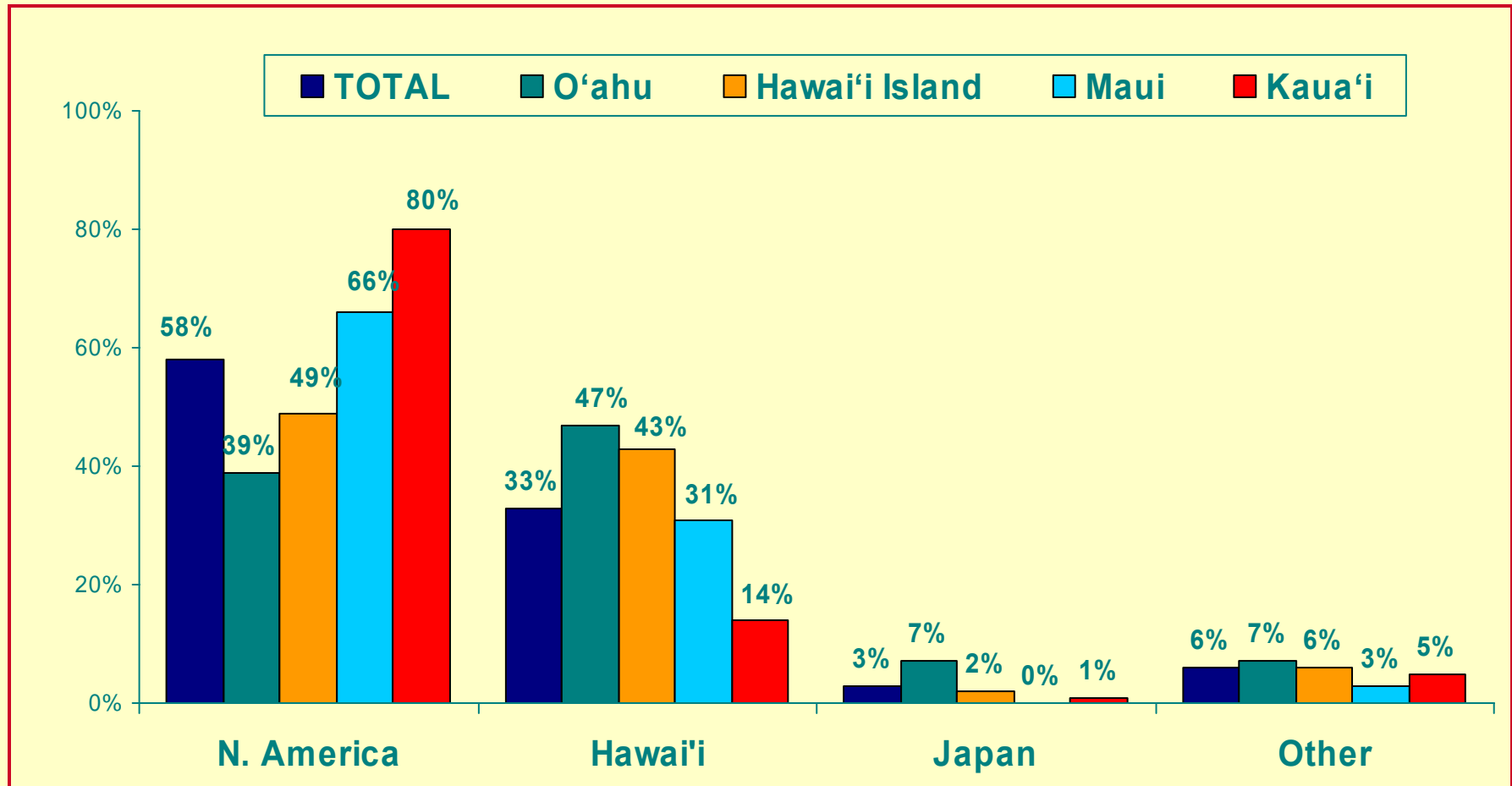


KAUA'I



Park Visitor Composition by Island (2007)

North American visitors again comprise the dominant mix of park users overall as well as on Kaua'i and Maui. Residents represent a plurality on O'ahu.

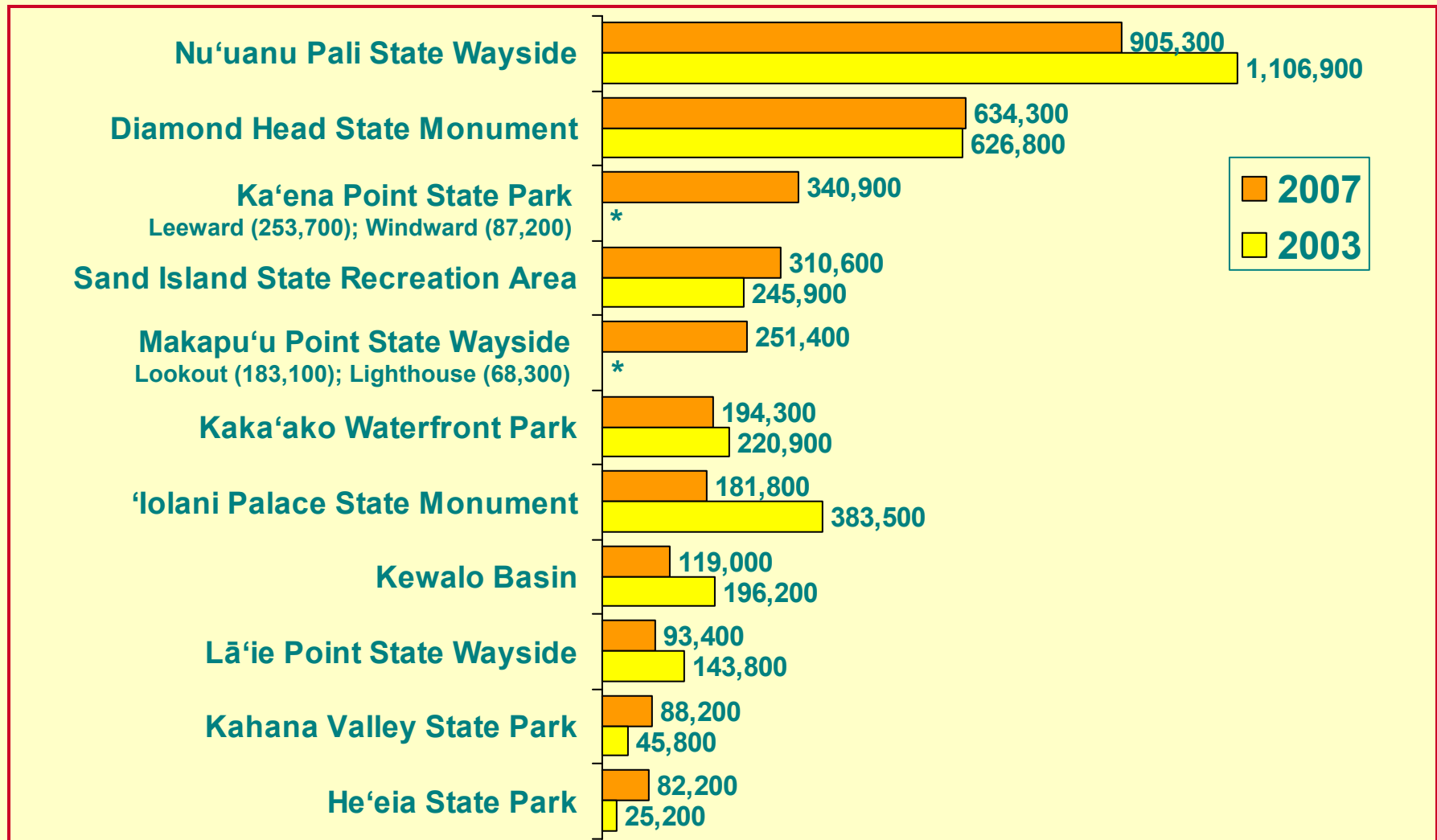


Base: Total (7,700); O'ahu (2,169); Hawai'i Island (1,879); Maui (784); Kaua'i (2,868)

Q1: What is your country of residence?

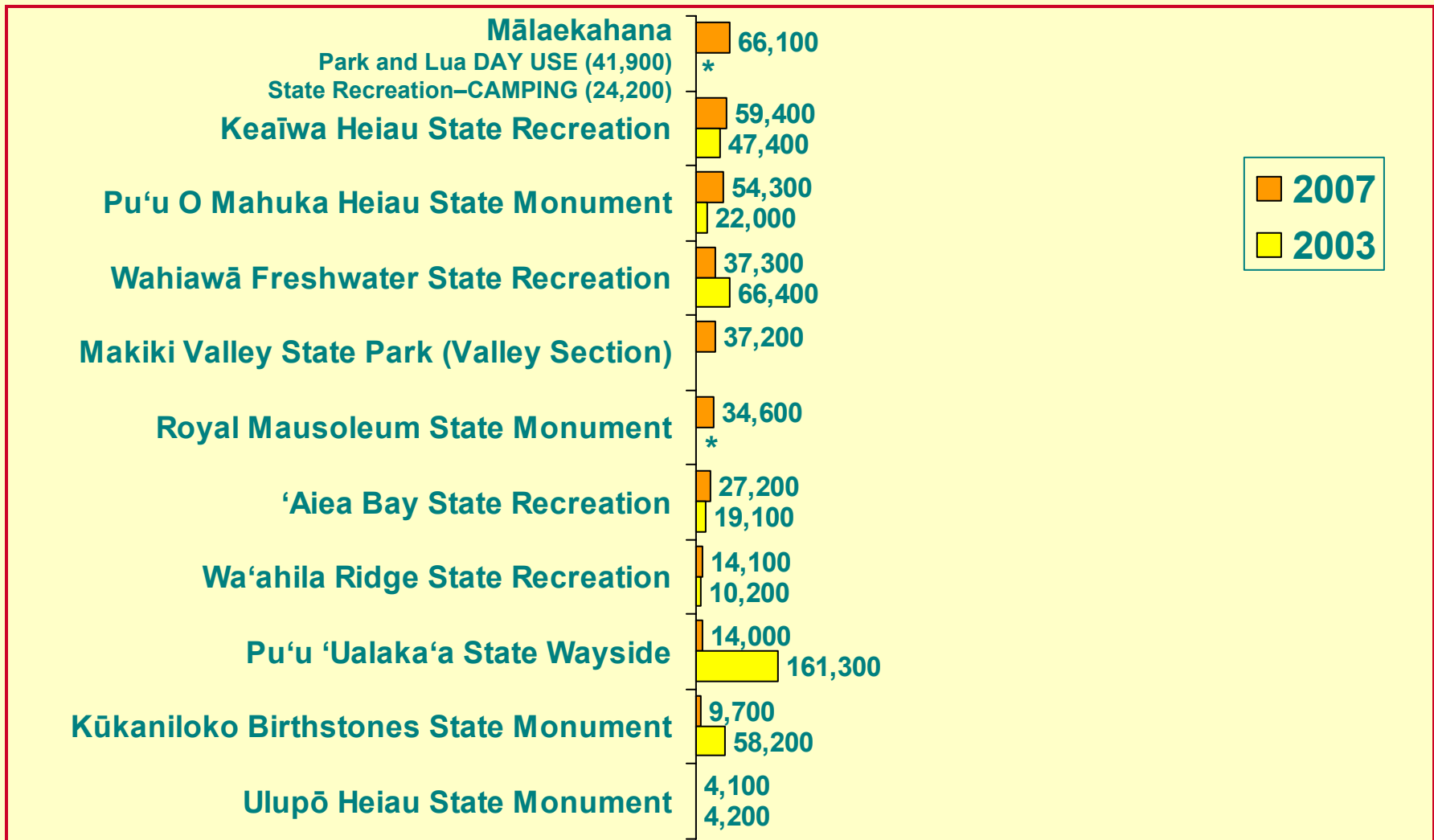
O'ahu Parks Counts: Tracking (1 of 2)

Usage at Nu'uanu Pali down 18% and Diamond Head usage has remained relatively constant as 2003. Due to refinement in counting methodology at Ka'ena Point usage is not comparable with 2003.



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O'ahu Parks Counts: Tracking (2 of 2)

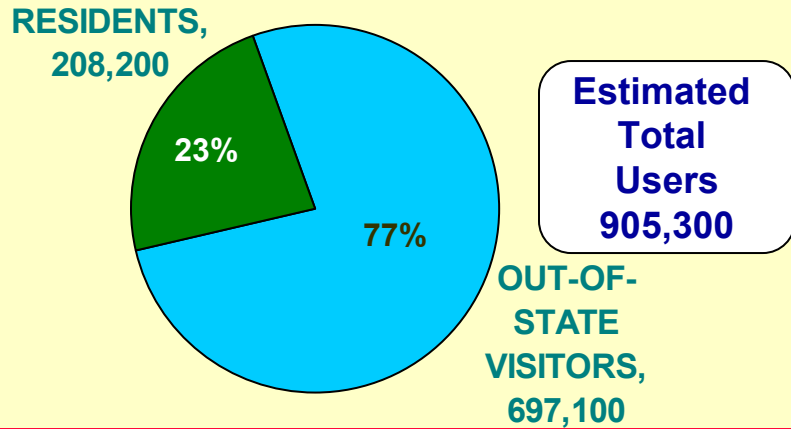


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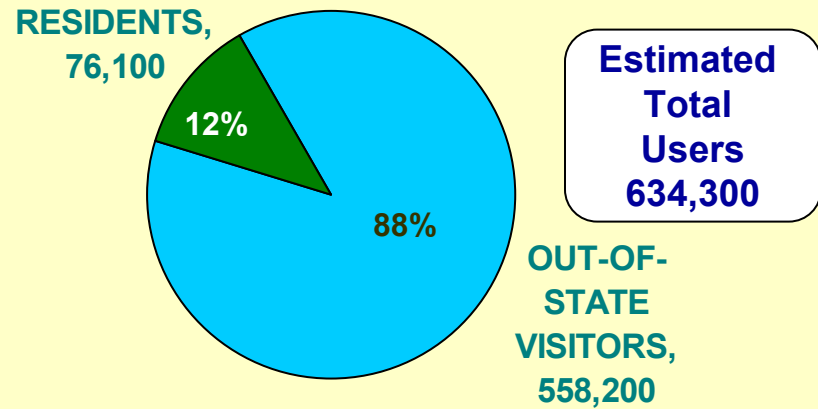
O'ahu Parks With Highest Usage Volume (Top 4)

The percentage of out-of-state visitors to O'ahu's top 4 parks remains very similar to 2003: Nu'uuanu +1 percentage point; Diamond Head -1. Due to security, only car counts were done at Ka'ena Point and Sand Island, and these estimates are based on 2003 composition.

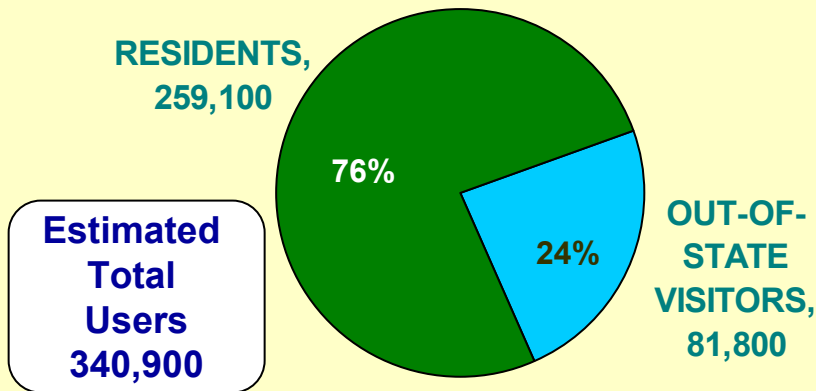
Nu'uuanu Pali State Wayside



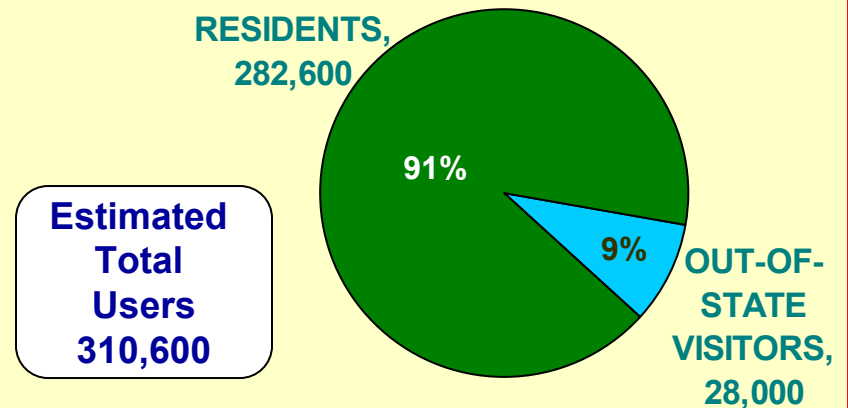
Diamond Head State Monument



Ka'ena Point State Park – Leeward & Windward

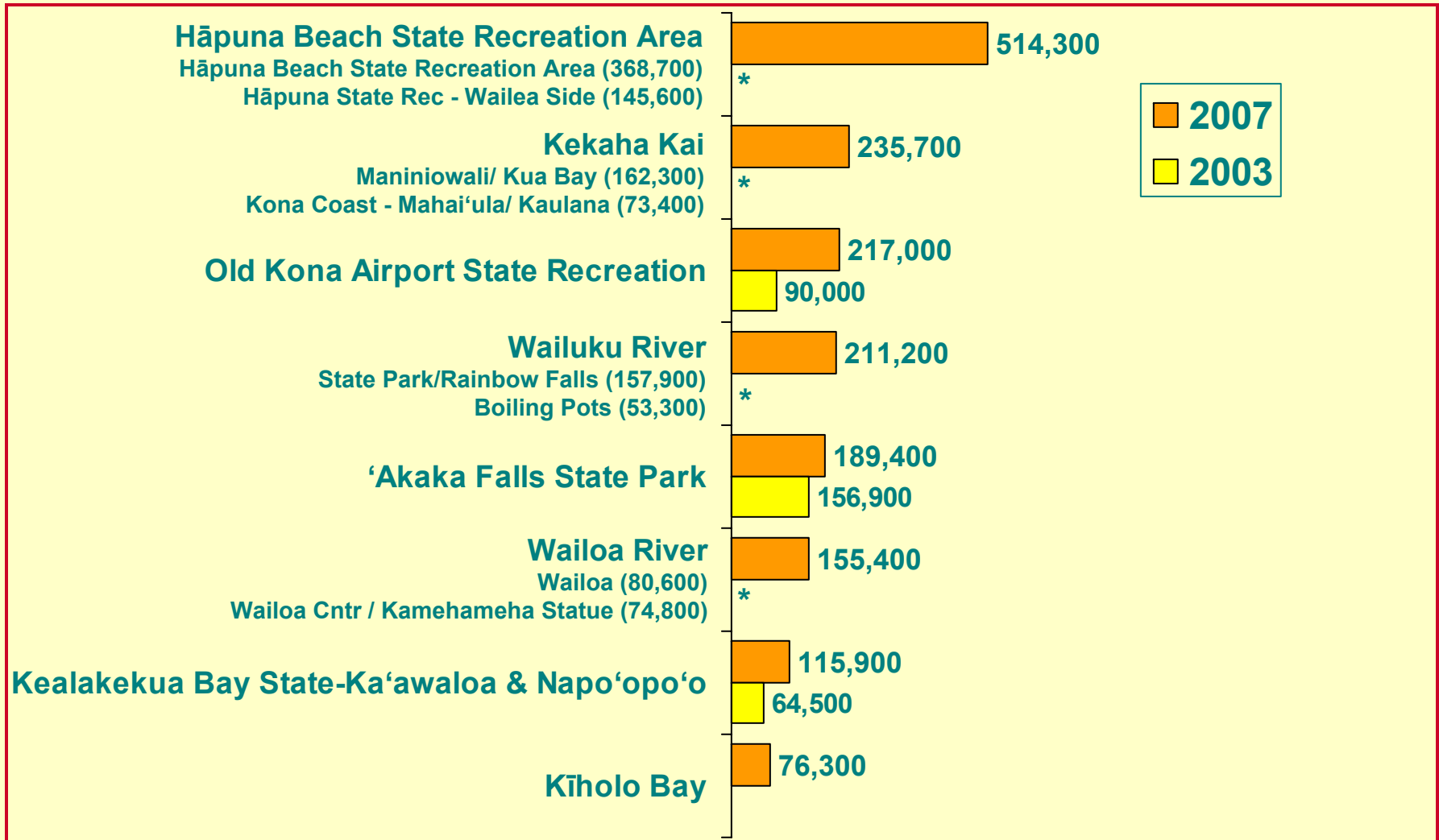


Sand Island State Recreation Area



Hawai'i Island Parks Counts: Tracking (1 of 2)

Expanded locations for counting users on the Hawai'i Island have resulted in more accurate counts. Hāpuna, the Island's largest volume park, serves over half a million, and three other parks have more than 200,000 users.



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Hawai'i Island Parks Counts: Tracking (2 of 2)

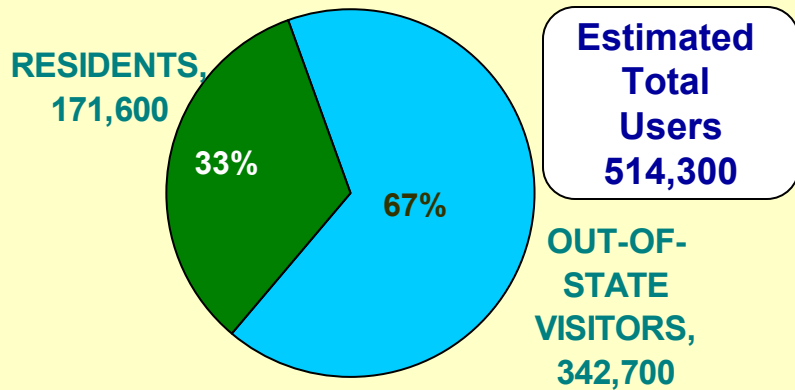


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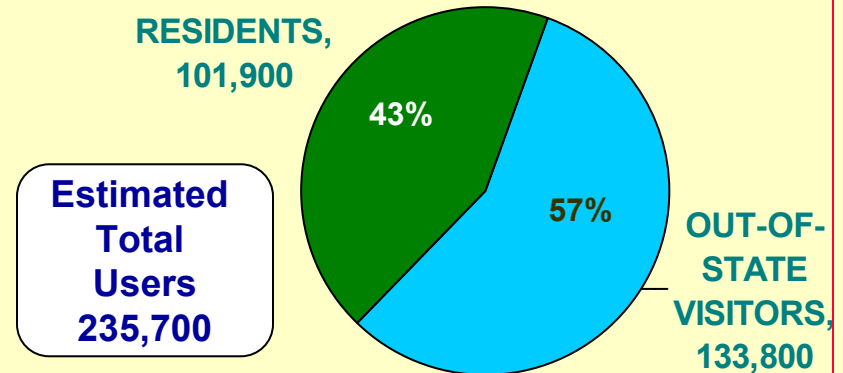
Hawai'i Island Parks With Highest Usage Volume (Top 4)

The Hawai'i Island Parks show more shifts in user composition due to multiple location counts. Compared with 2003, out-of-state visitors have increased +16 points at Hāpuna; +4 at Kekaha Kai; and decreased -5 at Old Kona Airport, and -8 at Wailuku River.

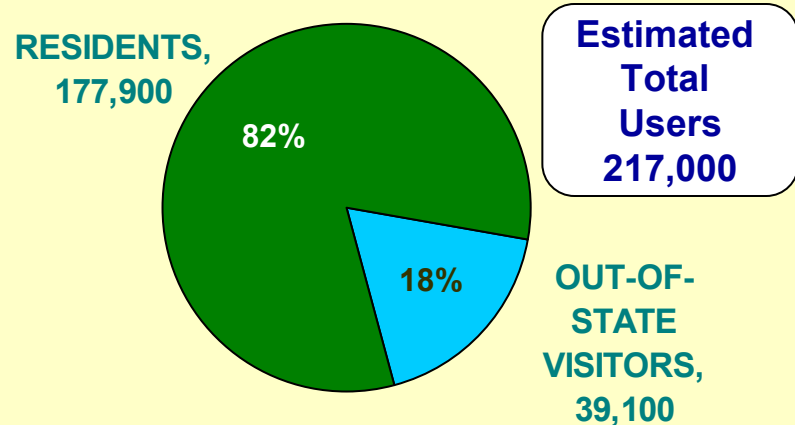
Hāpuna Beach State Recreation Area & Wailea Side



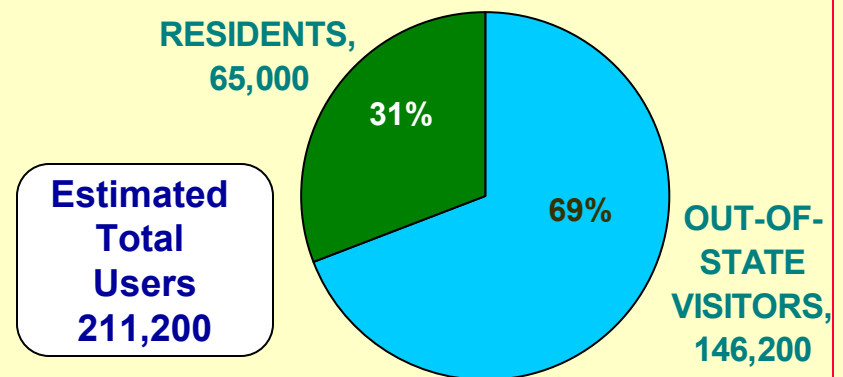
Kekaha Kai - Maniniowali/ Kua Bay & Maha'iula/Kaulana



Old Kona Airport State Recreation

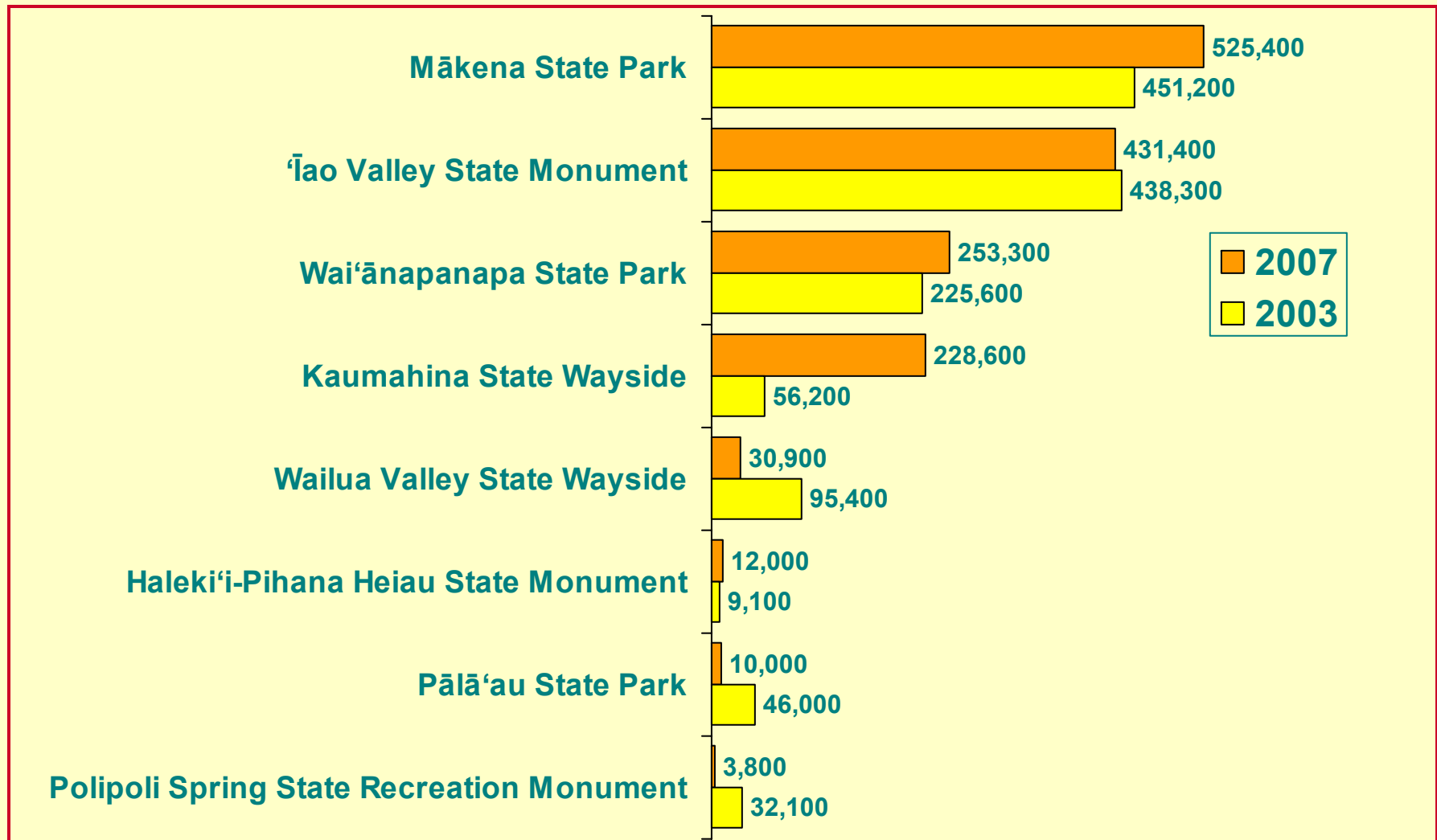


Wailuku River State Park/Rainbow Falls & Wailuku River Boiling Pots



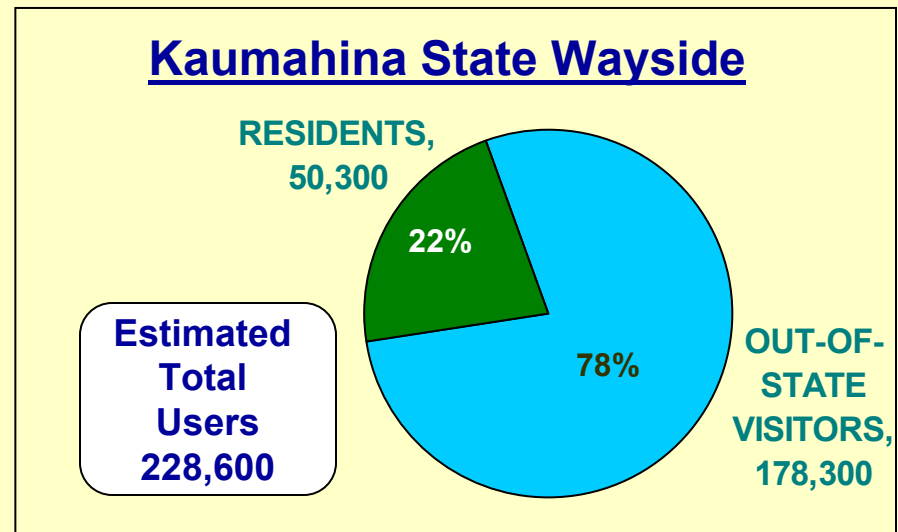
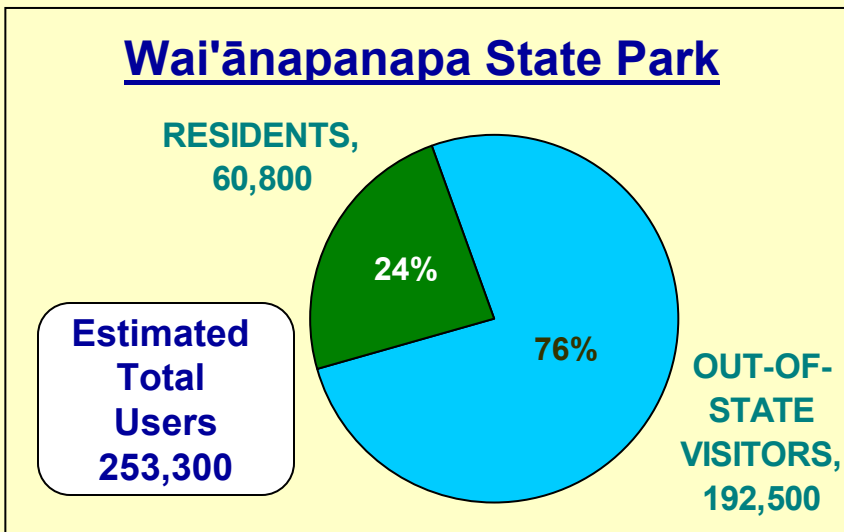
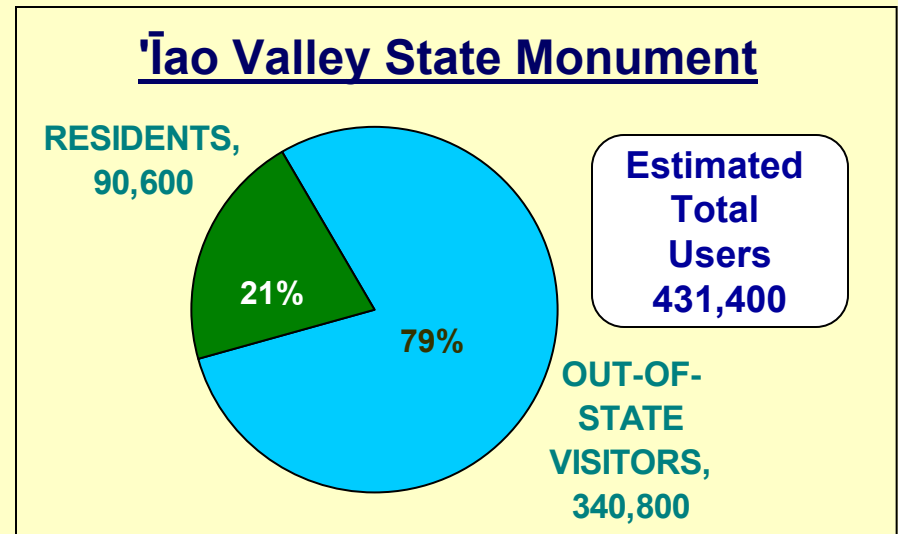
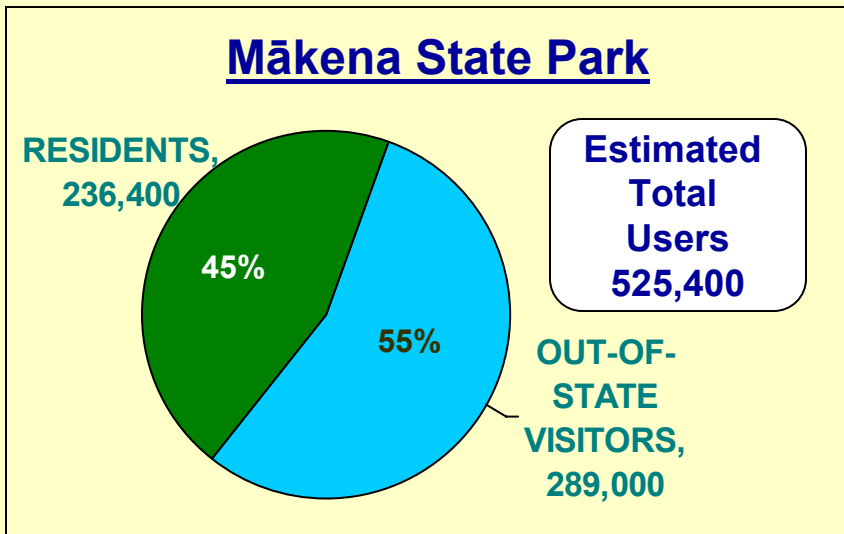
Maui Parks Counts (Tracking)

Usage is up at 2 of the 3 largest volume parks on Maui. While users have remained relatively constant at 'Īao Valley -2%, they have increased 16% at Mākena and 12% at Wai'ānapanapa.



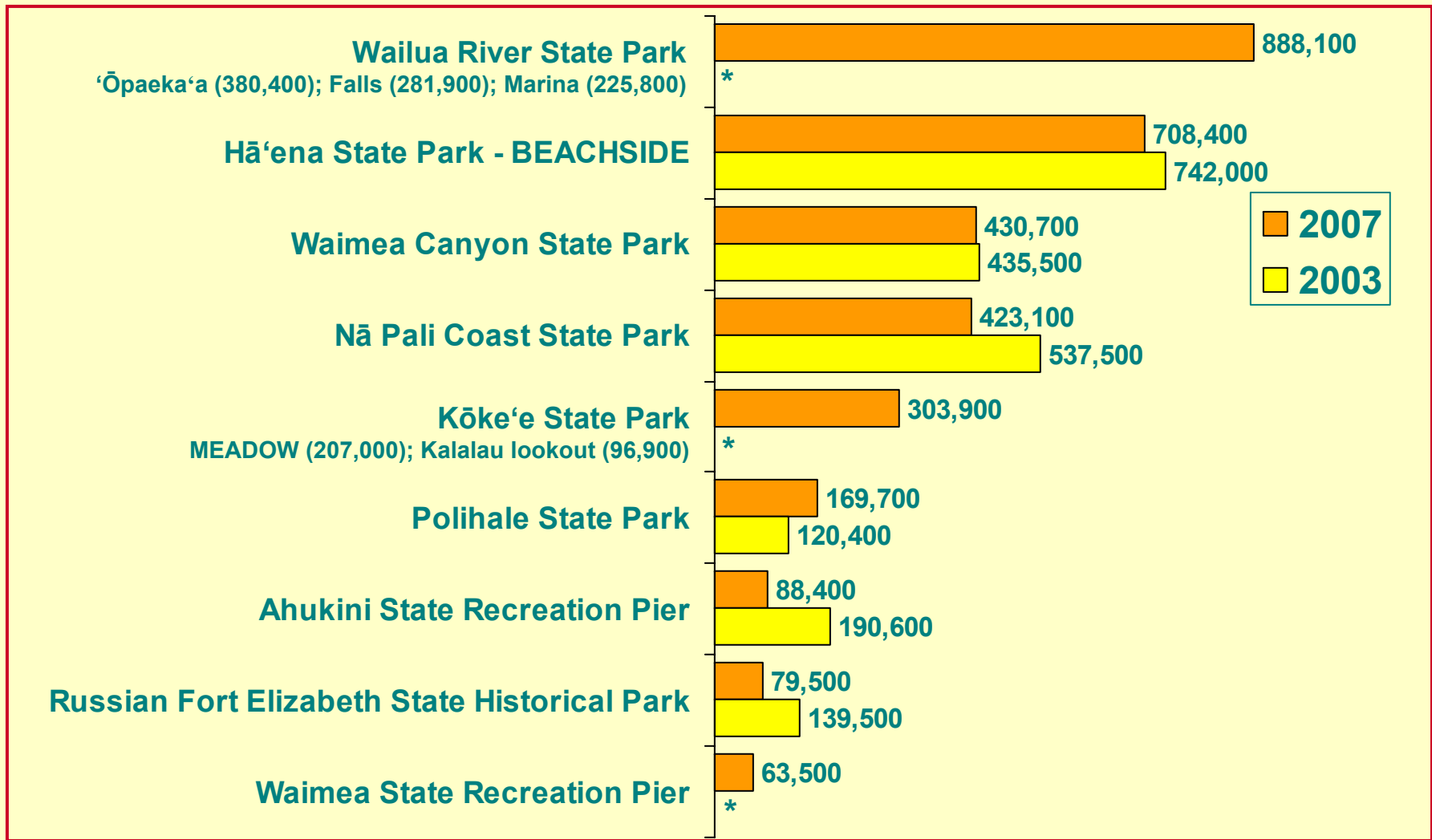
Maui Parks With Highest Usage Volume (Top 4)

The mix of residents and visitors is fairly stable within Maui. In 2007, non-residents in Mākena are -4 percentage points; 'Āo Valley -1; in Wai'ānapanapa -2, and in Kaumahina -18.



Kaua'i Parks Counts (Tracking)

The rank order of parks on Kaua'i has shifted with multiple locations counts at Wailua River State Park and a decline in users at Nā Pali. That said, Kaua'i's parks are heavily utilized with five greeting more than 300,000 users.

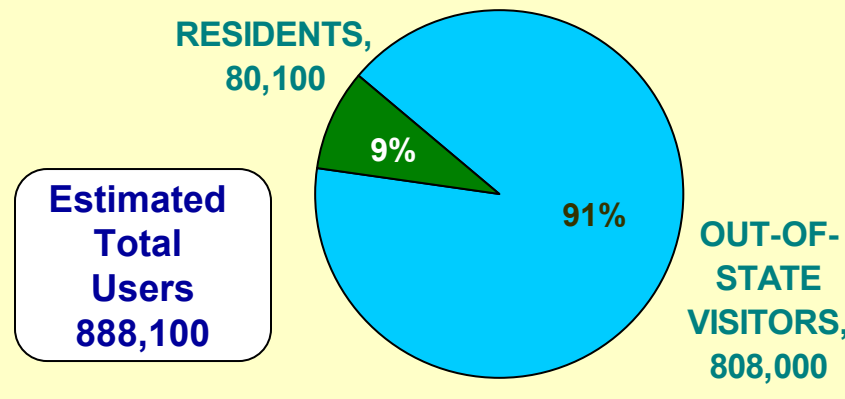


*Because of methodological enhancements, comparisons of volume in 2007 cannot be made with 2003 because it would not represent an "apple-to-apple" comparison.

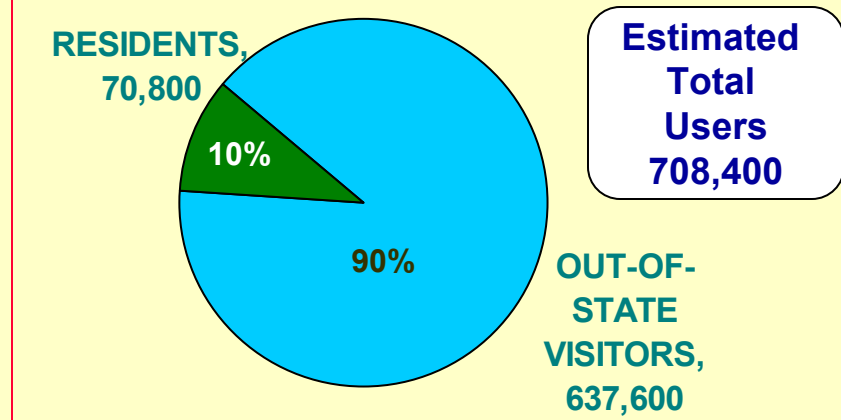
Kaua'i Parks With Highest Usage Volume (Top 4)

In the top 4 Kaua'i parks, out-of-state visitors account for approximately 9 of 10 visitors. Non-resident users are down -5 points at Wailua; -2 at Hā'ena; -8 at Waimea Canyon and -4 at Nā Pali.

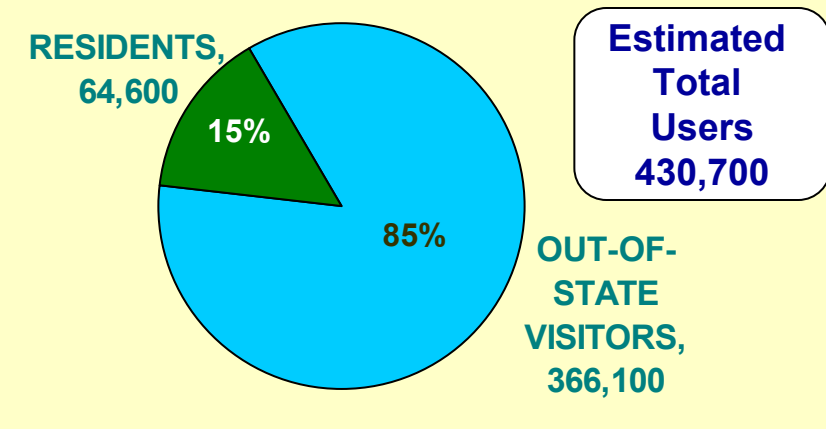
Wailua River State Park – 'Ōpaeka'a, Marina & Falls



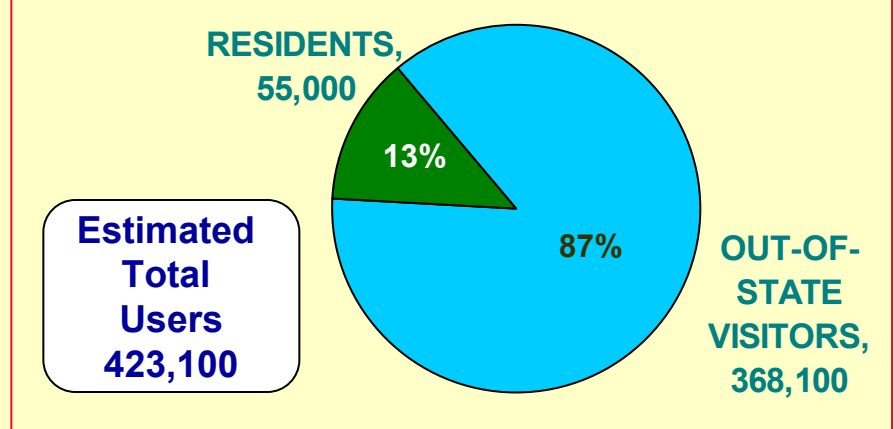
Hā'ena State Park



Waimea Canyon State Park



Nā Pali Coast State Park



Park Visitor by Island (Tracking)

While the resident-non-resident mix of park users overall and on O‘ahu and Kaua‘i has remained statistically comparable to 2003, the Hawai‘i Island shows more out-of-state visitors and Maui more residents.

	TOTAL		O‘AHU		HAWAI‘I ISLAND		MAUI		KAUA‘I	
	2003	2007	2003	2007	2003	2007	2003	2007	2003	2007
North America	60%	58%	42%	39%	44%	49%	70%	66%	80%	80%
Hawai‘i	31%	33%	46%	47%	46%	43%	24%	31%	13%	14%
Japan	3%	3%	5%	7%	2%	2%	1%	0%	1%	1%
Other	6%	6%	7%	7%	8%	6%	5%	3%	6%	5%
Base	11,658	7,700	5,844	2,169	2,027	1,879	717	784	3,069	2,868

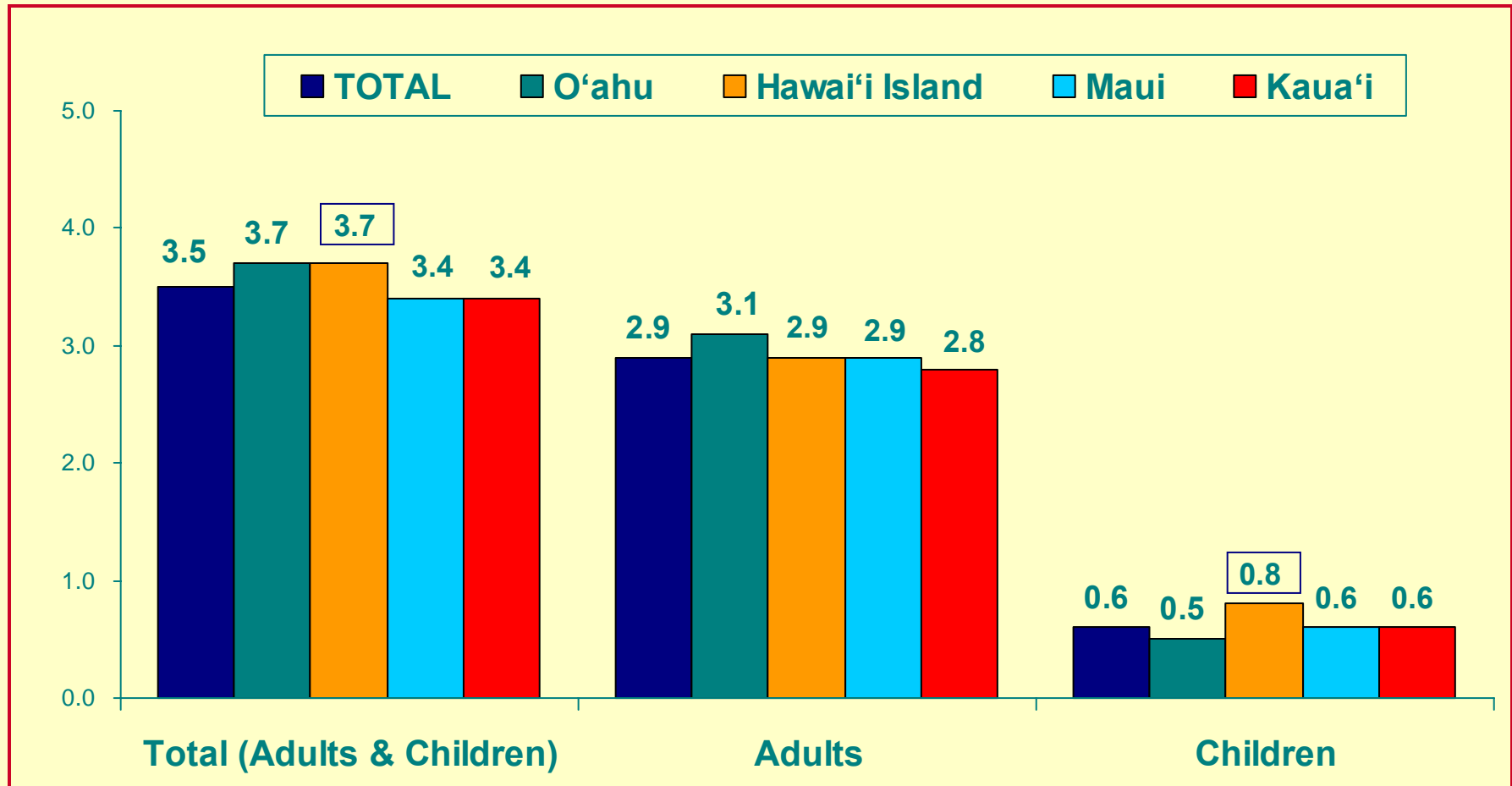
Q1: What is your country of residence?

PROFILE OF PARK USERS



Party Size (2007)

On average, the park visit party size is 3.5 adults and children overall. Party size is significantly larger on Hawai'i Island at 3.7, due to more children in the visiting party.



Base: Total (7,700); O'ahu (2,169); Hawai'i Island (1,879); Maui (784); Kaua'i (2,868)
Q2: How many persons including yourself, are in your party visiting this park today?

Party Size (Tracking)

In contrast with 2003, the average party size visiting the park system has grown by 6%. While adult party sizes are comparable to 2003, the number of children in the party has increased significantly on Hawai'i Island and Maui, contributing to the change.

	TOTAL		O'AHU		HAWAI'I ISLAND		MAUI		KAUA'I	
	2003	2007	2003	2007	2003	2007	2003	2007	2003	2007
Adults	2.8	2.9	3.1	3.1	3.0	2.9	2.6	2.9	2.5	2.8
Children	0.5	0.6	0.7	0.5	0.5	0.8	0.3	0.6	0.3	0.6
Total (Adults and Children)	3.3	3.5	3.8	3.7	3.4	3.7	2.8	3.4	2.8	3.4
Base	11,658	7,700	5,844	2,169	2,027	1,879	717	784	3,069	2,868

Q2: How many persons including yourself, are in your party visiting this park today?

Party Size by Island and Segment (2007)

Except on Kaua'i, where resident party sizes have grown, there are no significant changes in party size for residents or visitors.

	TOTAL		O'AHU		HAWAI'I ISLAND		MAUI		KAUA'I	
	Resi-Dents	Visi-tors	Resi-Dents	Visi-tors	Resi-Dents	Visi-tors	Resi-Dents	Visi-tors	Resi-Dents	Visi-tors
Adults	2.9	2.9	3.0	3.2	2.9	2.9	2.6	3.0	3.0	2.8
Children	0.8	0.5	0.8	0.4	0.9	0.7	0.5	0.6	0.7	0.5
Total (Adults and Children)	3.7	3.5	3.8	3.6	3.9	3.6	3.1	3.6	3.7	3.3
Base	2,033	5,667	737	1,432	650	1,229	238	546	408	2,460

Q2: How many persons including yourself, are in your party visiting this park today?

Demographics for All Park Users

- Generally, there are more park users who are male than female, although a slight majority on Hawai'i Island and Kaua'i are women. They average 43 years of age and have at least some college education.
- On O'ahu, a higher incidence of park users are high school graduates and lower income. Among non-resident visitors, O'ahu users trend male and older (47 years on average).
- Out-of-state visitors on Maui and Kaua'i tend to have higher incomes. Resident park users have generally lower income than out-of-state visitors for all the islands.

Demographics for All Park Users (2007)

	TOTAL	O'AHU	HAWAI'I ISLAND	MAUI	KAUA'I
GENDER					
Male	52%	58%	49%	57%	46%
Female	48%	42%	51%	43%	54%
AGE					
16-24	9%	10%	11%	8%	6%
25-34	22%	22%	22%	20%	23%
35-44	23%	20%	25%	19%	26%
45-54	23%	23%	21%	28%	23%
55-64	17%	18%	14%	19%	17%
65+	7%	7%	7%	6%	6%
Average	43.4	43.4	42.3	44.6	43.6
EDUCATION					
Some high school	3%	2%	3%	2%	3%
High school/Vocational graduate	21%	30%	23%	16%	15%
College-some/Graduate/Post	76%	68%	75%	82%	82%
INCOME					
Under \$35,000	12%	16%	14%	12%	9%
\$35,000 to \$49,000	19%	21%	19%	14%	19%
\$50,000 to \$99,999	38%	37%	41%	37%	39%
\$100,000 or more	31%	26%	27%	37%	34%

Demographics for Residents (2007)

	TOTAL	O'AHU	HAWAI'I ISLAND	MAUI	KAUA'I
GENDER					
Male	58%	62%	50%	64%	53%
Female	42%	38%	50%	36%	47%
AGE					
16-24	16%	16%	20%	11%	12%
25-34	28%	33%	22%	22%	33%
35-44	20%	19%	26%	13%	23%
45-54	19%	20%	13%	30%	16%
55-64	10%	7%	12%	17%	11%
65+	6%	4%	7%	7%	5%
Average	39.4	37.9	39.6	43.3	39.2
EDUCATION					
Some high school	4%	3%	5%	5%	6%
High school/Vocational graduate	37%	47%	34%	24%	25%
College-some/Graduate/Post	59%	50%	60%	71%	69%
INCOME					
Under \$35,000	25%	26%	24%	28%	20%
\$35,000 to \$49,000	33%	36%	31%	23%	40%
\$50,000 to \$99,999	30%	26%	37%	30%	29%
\$100,000 or more	12%	12%	8%	19%	11%

Demographics for Out-of-State Visitors (2007)

	TOTAL	O'AHU	HAWAI'I ISLAND	MAUI	KAUA'I
GENDER					
Male	50%	56%	49%	53%	45%
Female	50%	44%	51%	47%	55%
AGE					
16-24	5%	6%	5%	6%	5%
25-34	19%	15%	21%	19%	21%
35-44	24%	21%	25%	21%	26%
45-54	25%	24%	26%	27%	24%
55-64	20%	25%	15%	21%	17%
65+	7%	9%	7%	6%	6%
Average	45.2	47.0	44.4	45.2	44.2
EDUCATION					
Some high school	2%	2%	1%	1%	2%
High school/Vocational graduate	15%	18%	14%	12%	14%
College-some/Graduate/Post	83%	80%	85%	87%	84%
INCOME					
Under \$35,000	6%	8%	6%	4%	7%
\$35,000 to \$49,000	12%	10%	10%	10%	15%
\$50,000 to \$99,999	42%	45%	43%	40%	41%
\$100,000 or more	39%	37%	41%	46%	38%

Number of Visits (2007)

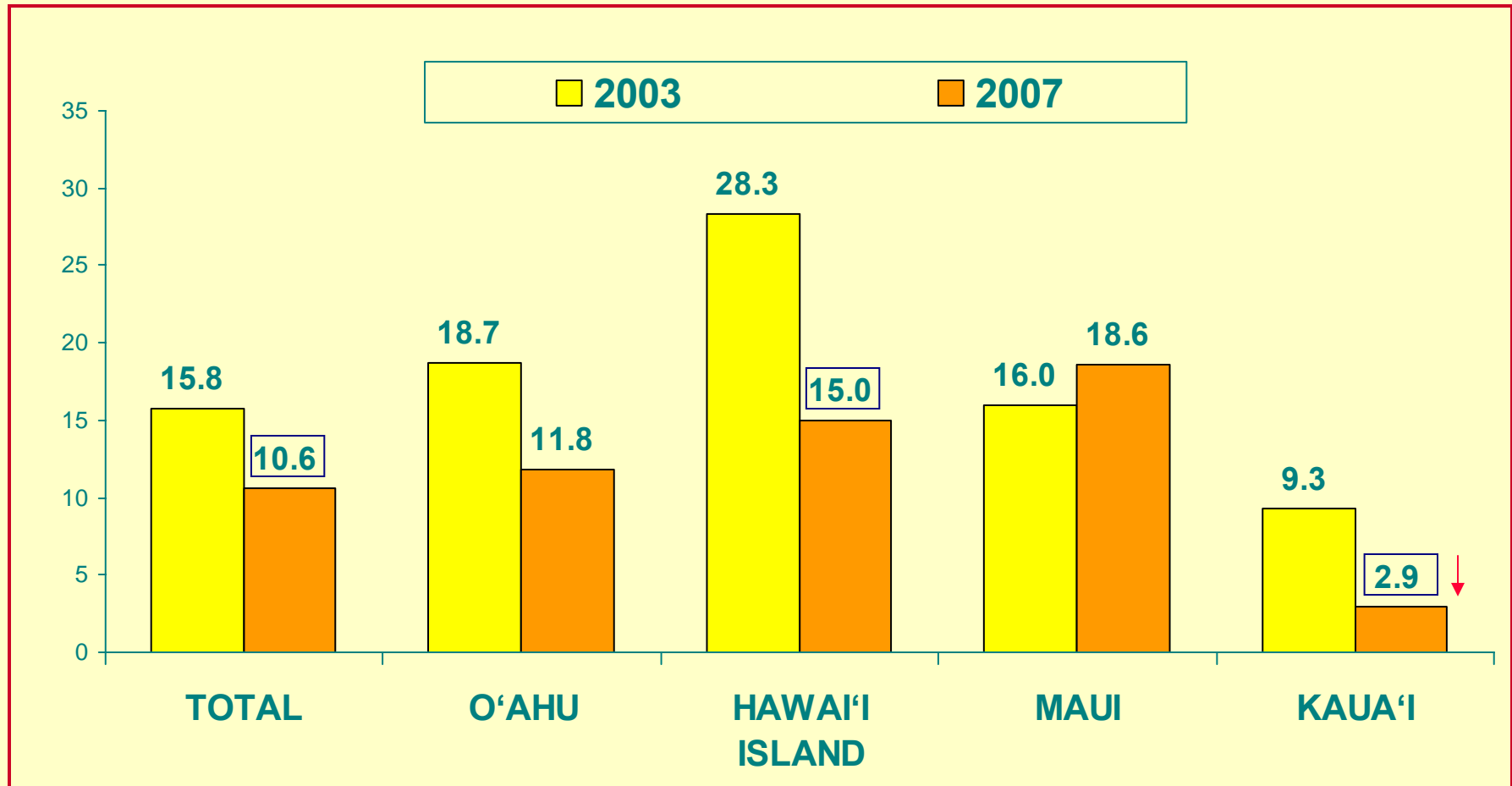
On average, annual park visits exceed 10 times. Frequency is highest for Maui at almost 19 times per year, and lowest on Kaua'i at under 3 times.

	TOTAL	O'AHU	HAWAI'I ISLAND	MAUI	KAUA'I
1	62%	57%	50%	59%	76%
2 to 5	20%	21%	21%	17%	19%
6 to 9	5%	5%	8%	5%	3%
10 to 49	8%	11%	13%	7%	1%
50 to 99	2%	2%	4%	5%	0%
100+	3%	4%	5%	8%	1%
Mean	10.6	11.8	15.0	18.6	2.9
Base	6,895	1,984	1,636	741	2,534

Q3: In the last year, how many visits did you make to this park including this one?

Frequency of Visits by Island (Tracking)

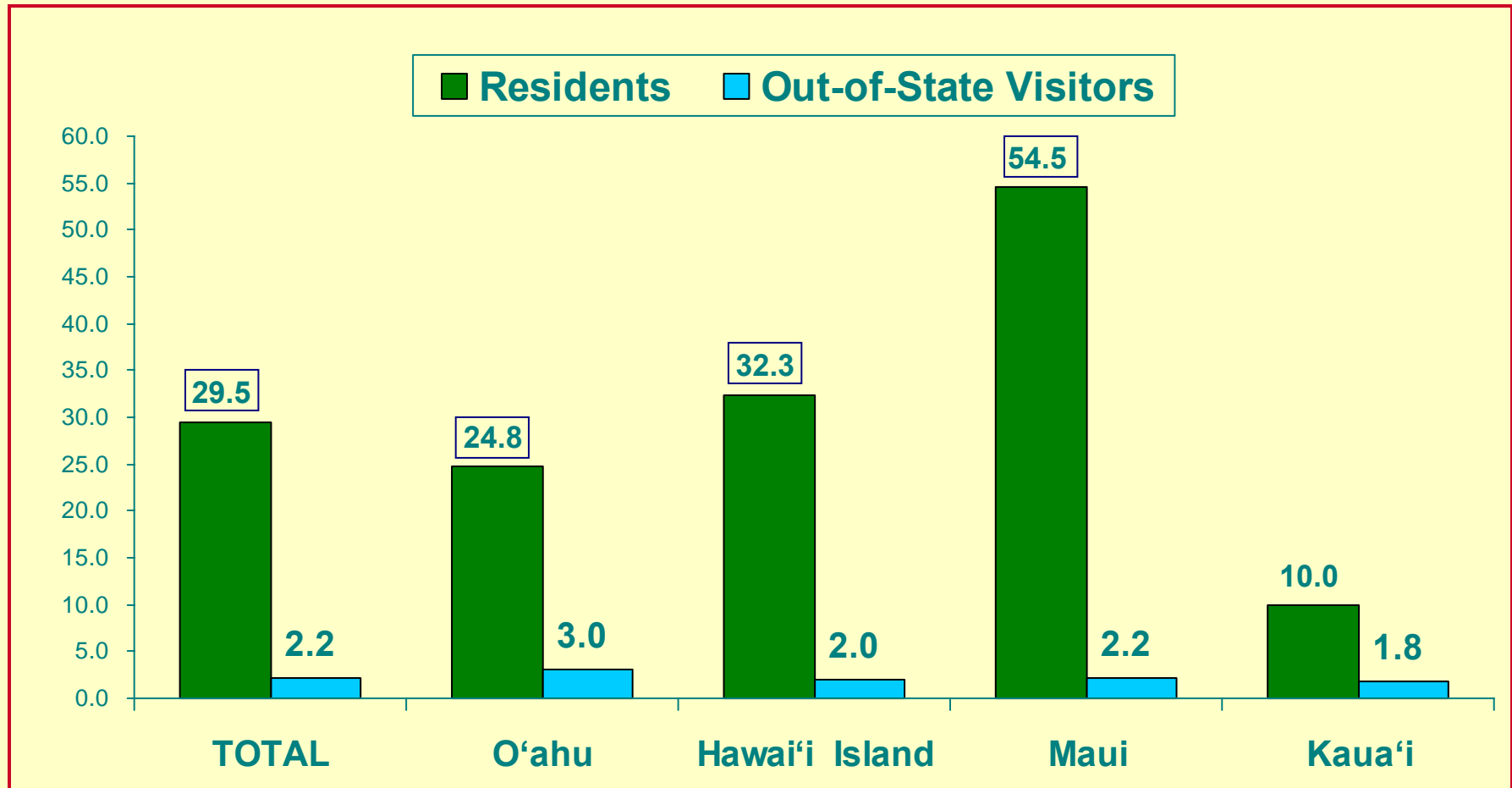
Frequency of visits has declined overall by 49%. Significant decreases have occurred on Hawai'i Island and Kaua'i, down almost half and two thirds, respectively.



Base: 2007: Total (6,895), O'ahu (1,984), Hawai'i Island (1636), Maui (741), Kaua'i (2,534)
2003: Total (11,658); O'ahu (5,844); Hawai'i Island (2,027), Maui (717); Kaua'i (3,069)
Q3: In the last year, how many visits did you make to this park including this one?

Frequency of Visits by Segment and Island (2007)

Although it is not surprising that high frequency is driven by residents, it is surprising that out-of-state visitors go to the same park more than once in a year. On average, in fact, non-residents visit twice a year, and 3 times on O'ahu.



Base: Total (1,873/5,022); O'ahu (702/1,282); Hawai'i Island (566/1,070); Maui (229/512); Kaua'i (376/2,158)

Q3: In the last year, how many visits did you make to this park including this one?

Frequency of Visits by Segment and Island (Tracking)

Hawai'i residents report a 32% decrease in the frequency with which they visit state parks in the past year. Statistically significant declines are evident among residents on the Hawai'i Island (-37%) and Kaua'i (-83%). Out-of-state visitors also report lower frequency of visit to Hawai'i Island parks (-66%).

	RESIDENTS		OUT-OF-STATE VISITORS	
	2003	2007	2003	2007
TOTAL	43.5	29.5	2.9	2.2
O'ahu	35.6	24.8	3.3	3.0
Hawai'i Island	51.5	32.3	6.0	2.0
Maui	55.2	54.5	3.2	2.2
Kaua'i	58.1	10.0	1.9	1.8

Q3: In the last year, how many visits did you make to this park including this one?

Travelgraphics: Out-of-State Visitors Only (2007)

- **Almost three-fifths of out-of-state visitors to parks are repeat visitors. On average, they have been to Hawai'i just over four times, and almost five times on O'ahu and Hawai'i Island.**
- **The main reasons behind their visits are nature and scenery (71%) and relaxation (67%). Kaua'i visitors have a higher incidence of enjoying nature and scenery, activities and socializing, while Maui visitors like the sand and surf.**

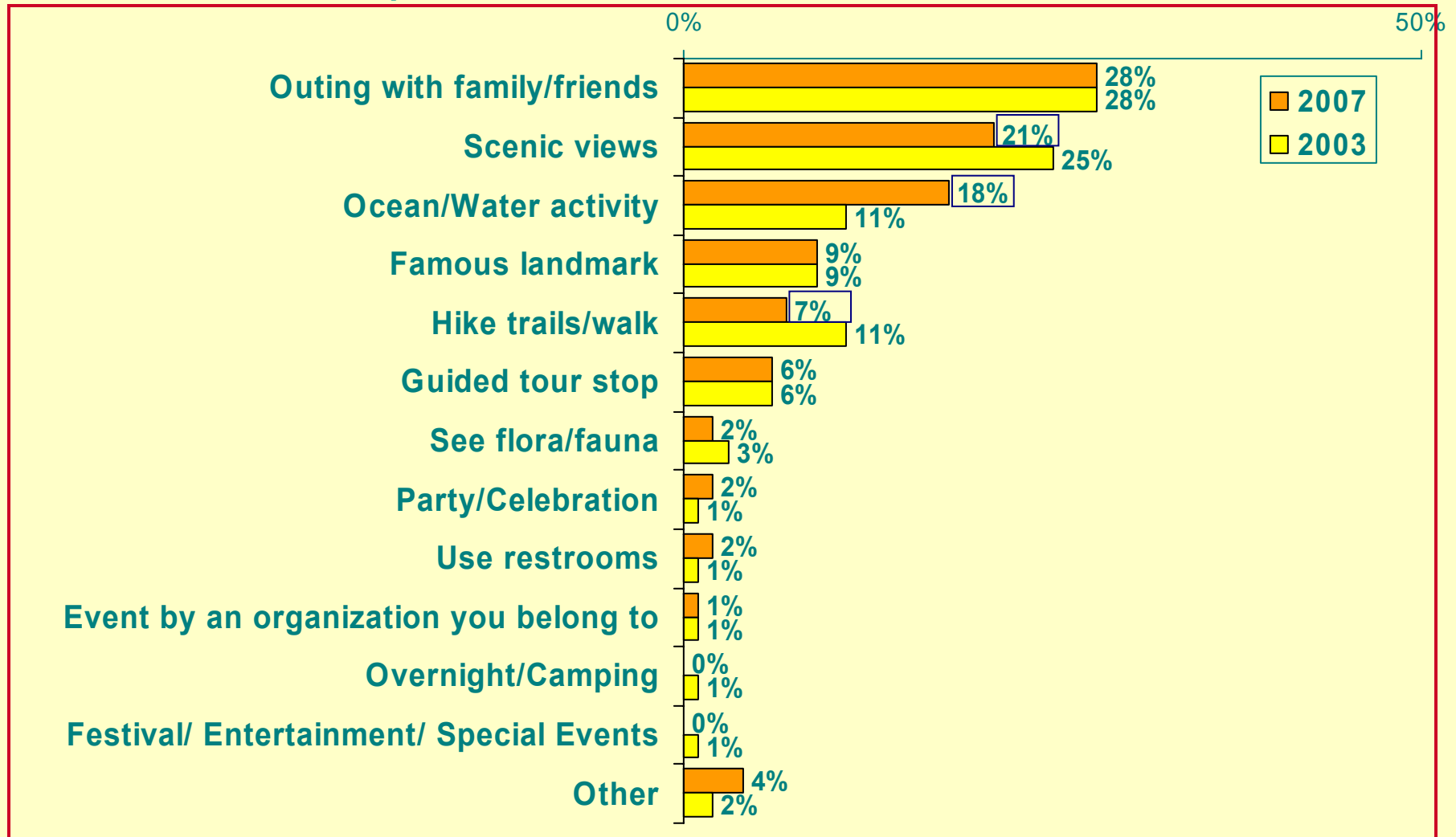
Travelgraphics: Out-of-State Visitors Only (2007)

	TOTAL	O'AHU	HAWAI'I ISLAND	MAUI	KAUA'I
NUMBER OF TRIPS TO HAWAI'I					
First time	42%	44%	42%	42%	40%
Repeat	58%	56%	58%	58%	60%
2	19%	20%	16%	18%	20%
3	9%	8%	9%	8%	10%
4	6%	5%	6%	7%	7%
5-9	14%	9%	16%	17%	15%
10 or more	11%	14%	11%	8%	9%
Average	4.2	4.9	4.5	4.1	3.7
VISITOR TYPE					
Nature/scenery	71%	71%	65%	69%	73%
Relaxation	67%	67%	63%	69%	67%
Sand/surf	52%	48%	55%	58%	52%
Activities	45%	34%	44%	44%	52%
Culture	35%	39%	32%	36%	34%
Family	34%	26%	35%	35%	39%
Socializing	20%	16%	17%	19%	24%

MOTIVATIONAL ANALYSIS

Main Reason for Park Visits: Statewide (Tracking)

As in 2003, social outings and scenic views are most frequently cited as reasons for park visits. Users going for ocean and water activity have increased +7 points, while hikers have declined -4 points.

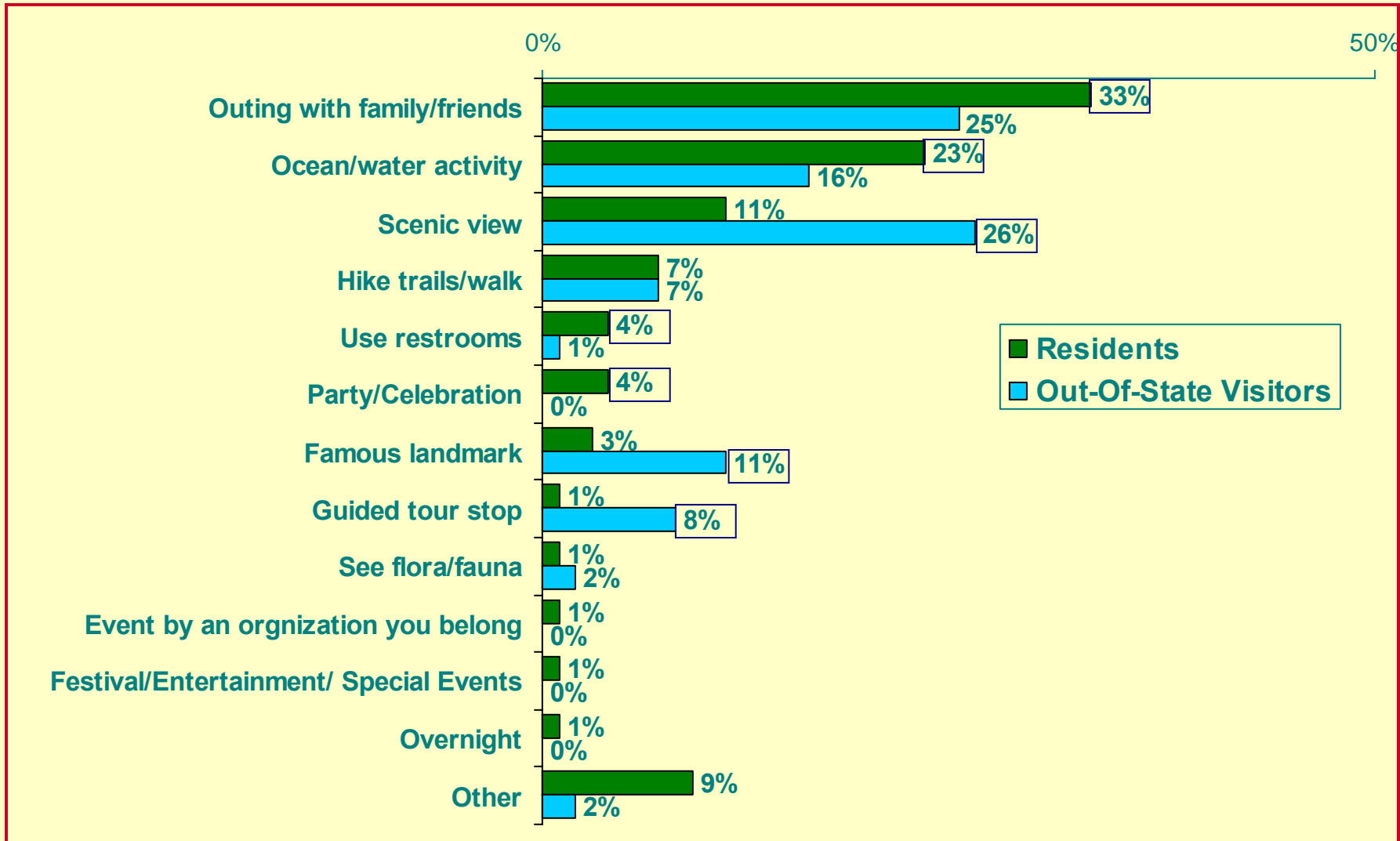


Base: 2007 (7,447); 2003 (11,658)

Q4: What is the main reason for visiting this park?

Main Reason for Park Visit by Segment (2007)

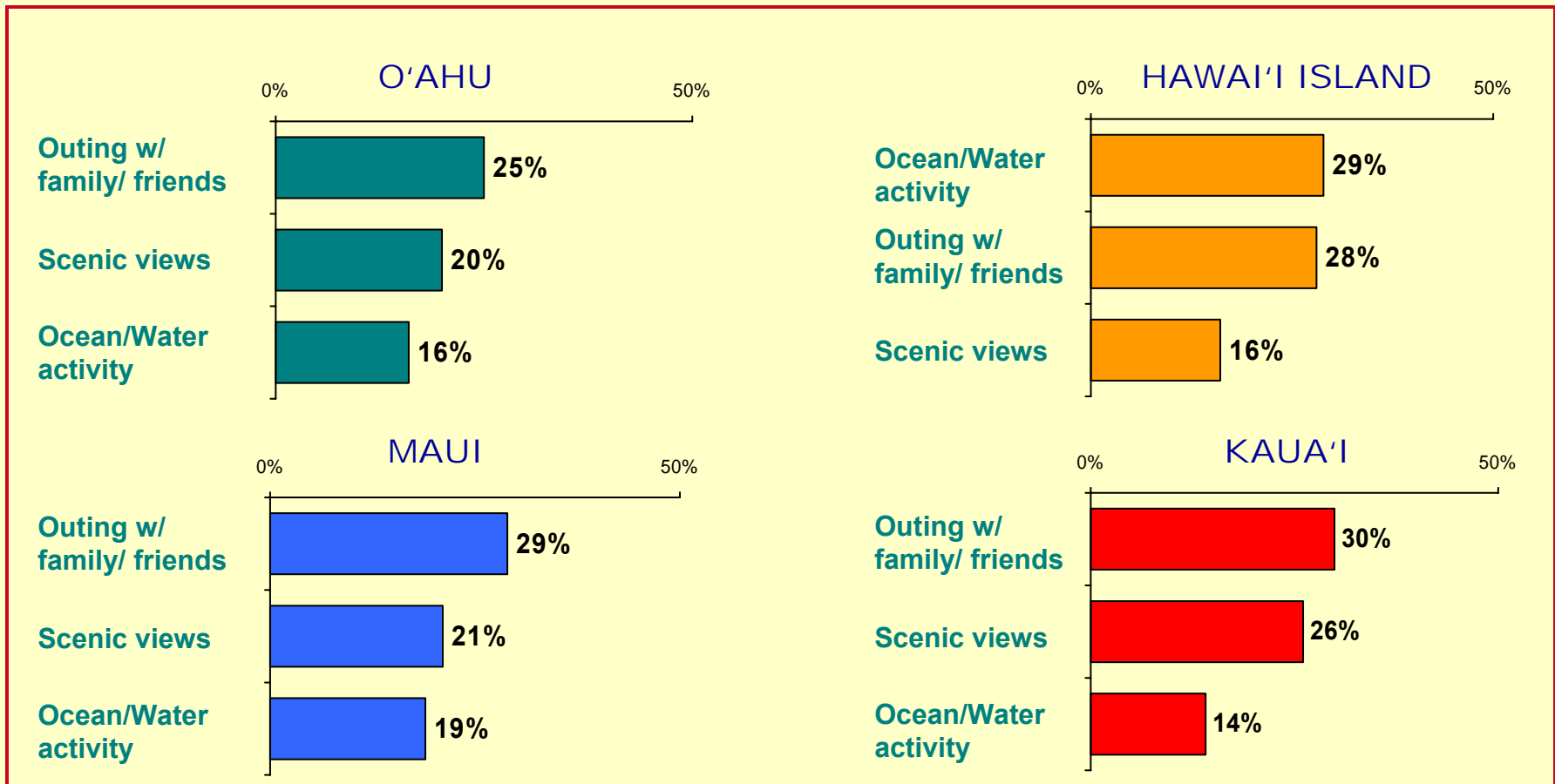
While residents go to parks for outings and ocean activities, non-residents enjoy scenic views, landmarks or a guided tour stop.



Base: Residents (1,965); Visitors (5,482)
 Q4: What is the main reason for visiting this park?

Park User Motivations Top 3 By Island (2007)

User motivations differ only slightly by Island. Except for Hawai'i Island, family or friends outings is the main motivation. On Hawai'i Island, this reason is tied for #1 with ocean and water activities, the third most mentioned reason on other Islands.



Base: O'ahu (2,097); Hawai'i Island (1,797), Maui (776); Kaua'i (2,777)
 Q4: What is the main reason for visiting this park?

Park User Motivations by Island: Detail (Tracking)

Park users motivated to enjoy ocean and water activities are up on O‘ahu and Hawai‘i Island, while family outings have increased on Kaua‘i.

	O‘AHU		HAWAI‘I ISLAND		MAUI		KAUA‘I	
	2003	2007	2003	2007	2003	2007	2003	2007
Outing with family/friends	31%	25%	29%	28%	24%	29%	25%	30%
Scenic views	25%	20%	20%	16%	24%	21%	28%	26%
Ocean/Water activity	8%	16%	13%	29%	15%	19%	12%	14%
Famous landmark	11%	13%	7%	5%	11%	6%	7%	8%
Hike trails/walk	7%	7%	6%	3%	10%	5%	18%	11%
Guided tour stop	7%	10%	9%	2%	6%	6%	4%	4%
See flora/fauna	1%	1%	3%	2%	4%	3%	3%	2%
Party/Celebration	2%	1%	3%	4%	1%	1%	1%	1%
Event by an organization you belong	1%	1%	2%	1%	0%	1%	0%	0%
Use restrooms	1%	1%	5%	5%	1%	5%	0%	1%
Overnight/Camping	1%	0%	0%	0%	1%	1%	1%	0%
Festival/Entertainment/Special Events	1%	0%	0%	0%	0%	1%	0%	0%
Other	4%	6%	4%	5%	3%	2%	1%	3%
Base	5,844	2,097	2,027	1,797	717	776	3,069	2,777

Q4: What is the main reason for visiting this park?

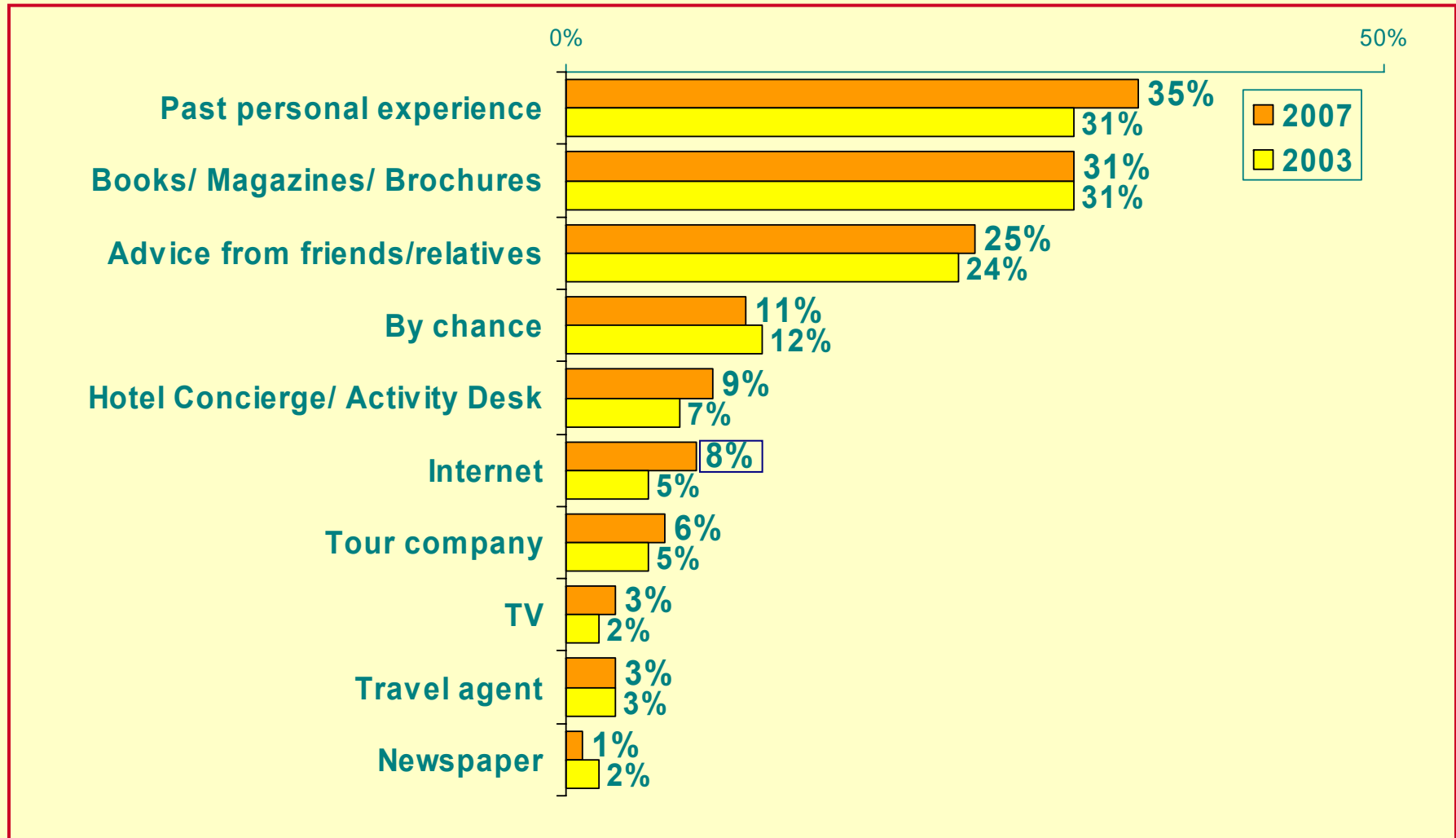
Park User Motivations by Island and Segment (2007)

	O'AHU		HAWAI'I ISLAND		MAUI		KAUA'I	
	Resi- dents	Out- of- State Visi- tors	Resi- dents	Out- of- State Visi- tors	Resi- dents	Out- of- State Visi- tors	Resi- dents	Out- of- State Visi- tors
Outing with family/friends	34%	19%	31%	25%	28%	29%	42%	28%
Ocean/water activity	24%	10%	24%	32%	30%	14%	11%	15%
Scenic view	12%	25%	8%	21%	9%	26%	16%	28%
Hike trails/walk	8%	6%	5%	2%	6%	4%	10%	11%
Use restrooms	1%	0%	8%	3%	6%	4%	3%	1%
Party/Celebration	2%	0%	9%	1%	3%	0%	1%	0%
Famous landmark	3%	20%	2%	8%	2%	8%	7%	8%
Guided tour stop	1%	16%	1%	3%	3%	7%	1%	5%
See flora/fauna	1%	0%	1%	4%	2%	3%	1%	2%
Event by an organization you belong to	1%	0%	2%	0%	1%	1%		0%
Festival/Entertainment/Special Events	0%	0%	1%	0%	4%	0%		0%
Overnight	0%	0%	1%	0%	2%	1%	1%	0%
Other	12%	2%	8%	2%	5%	1%	7%	2%
Base	712	1,385	622	1,175	234	542	397	2,380

Q4: What is the main reason for visiting this park?

Sources of Information: Statewide (Tracking)

The importance of past personal experience ranks first has increased since 2003. It now ranks as the most used source of information on parks, with books, magazines and brochures ranking second. Internet usage has almost doubled.

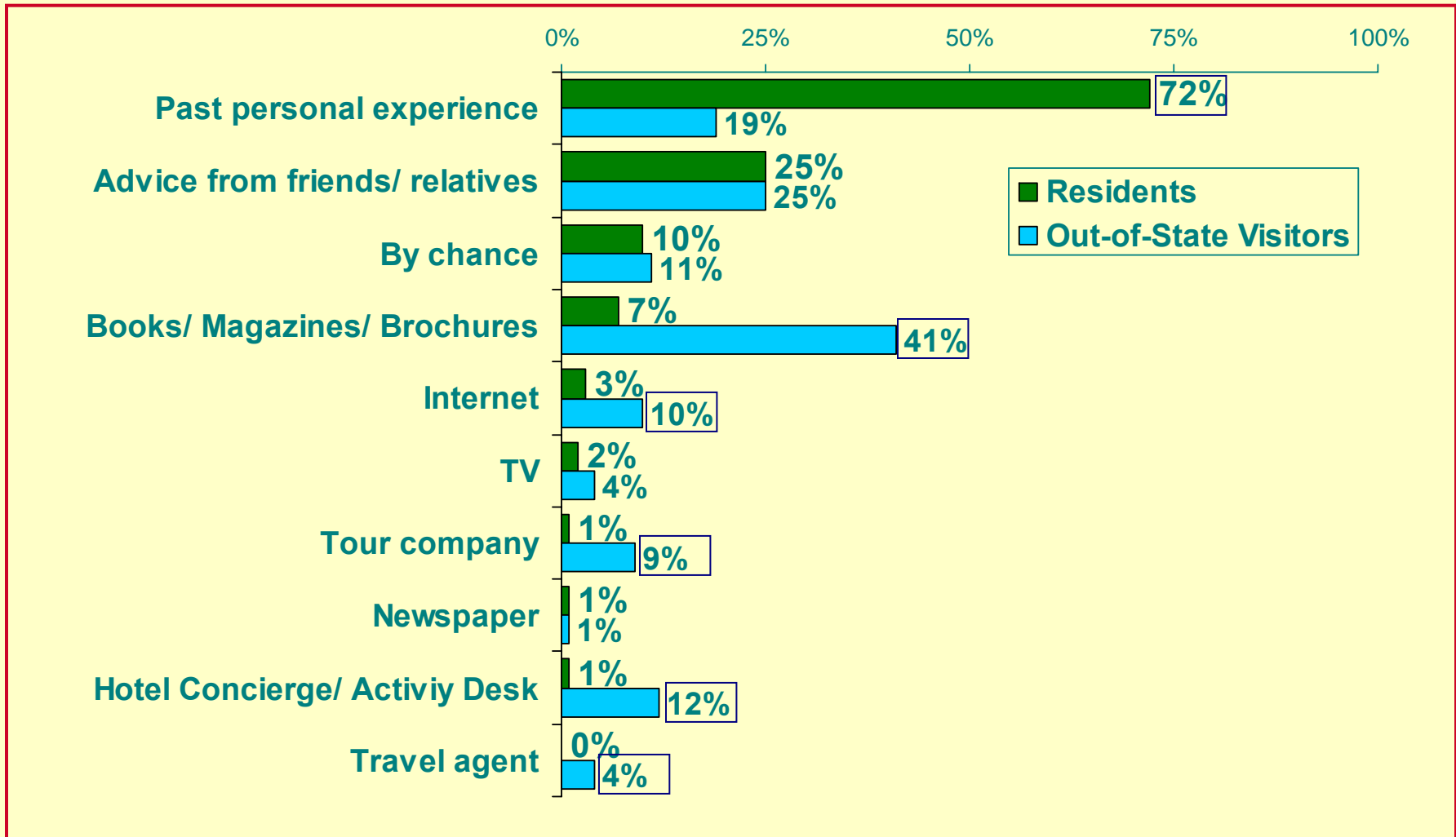


Base: 2007 (7,330); 2003 (11,658)

Q10: Where did you get information about this park?

Sources of Information by Segment (2007)

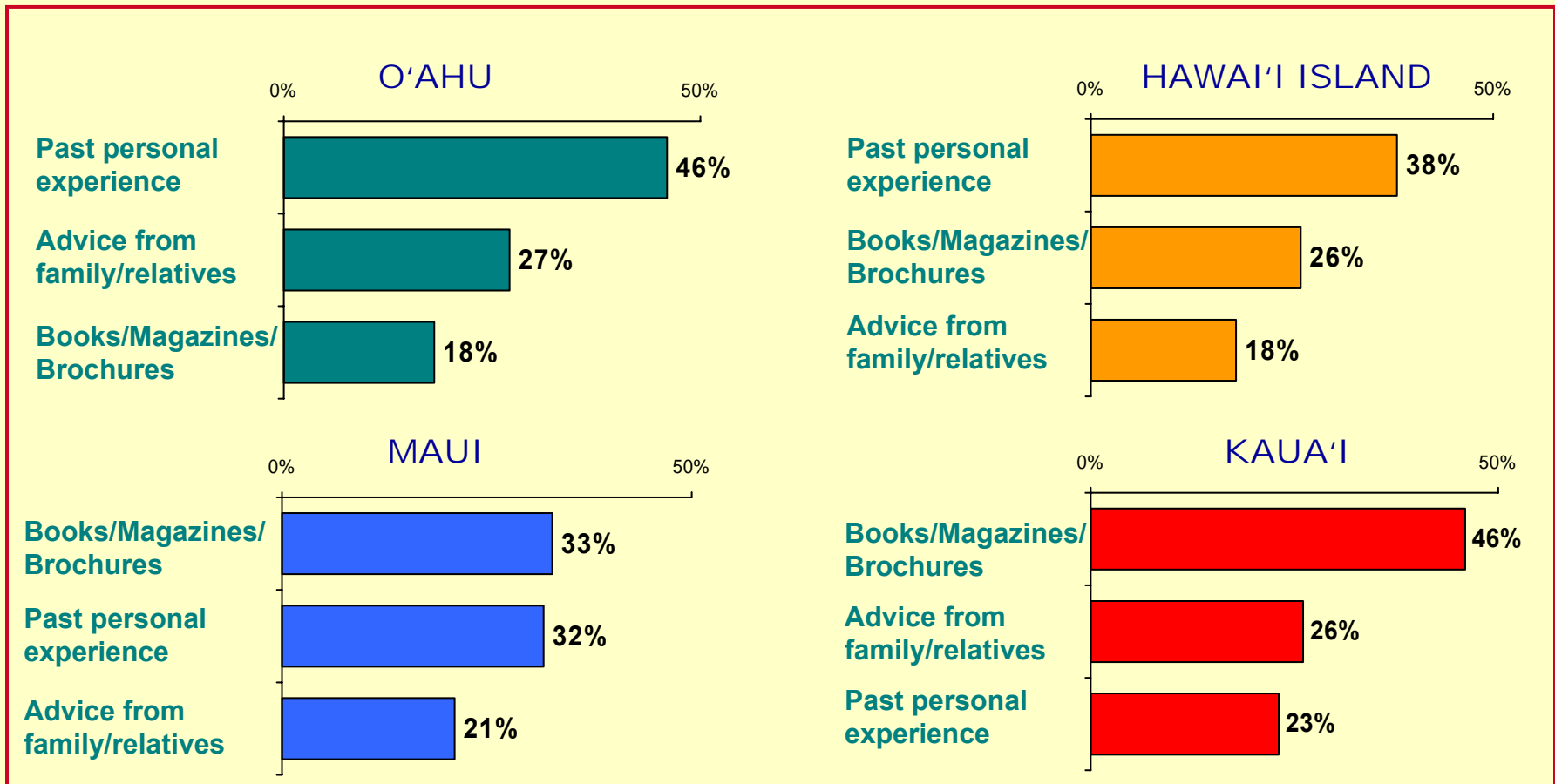
While residents rely on personal experience, out-of-state visitors, not surprisingly rely on printed materials (41%); hotel advice (12%) and the Internet (10%).



Base: Residents (1,914); Visitors (5,416)
 Q10: Where did you get information about this park?

Sources of Information Top 3 by Island (2007)

The sources of information used by Island tends to track with the resident vs. out-of-state visitor mix of park users on that Island.



Base: O'ahu (2,093); Hawai'i Island (1,735); Maui (731); Kaua'i (2,771)
 Q10: Where did you get information about this park?

Sources of Information by Segment (2007)

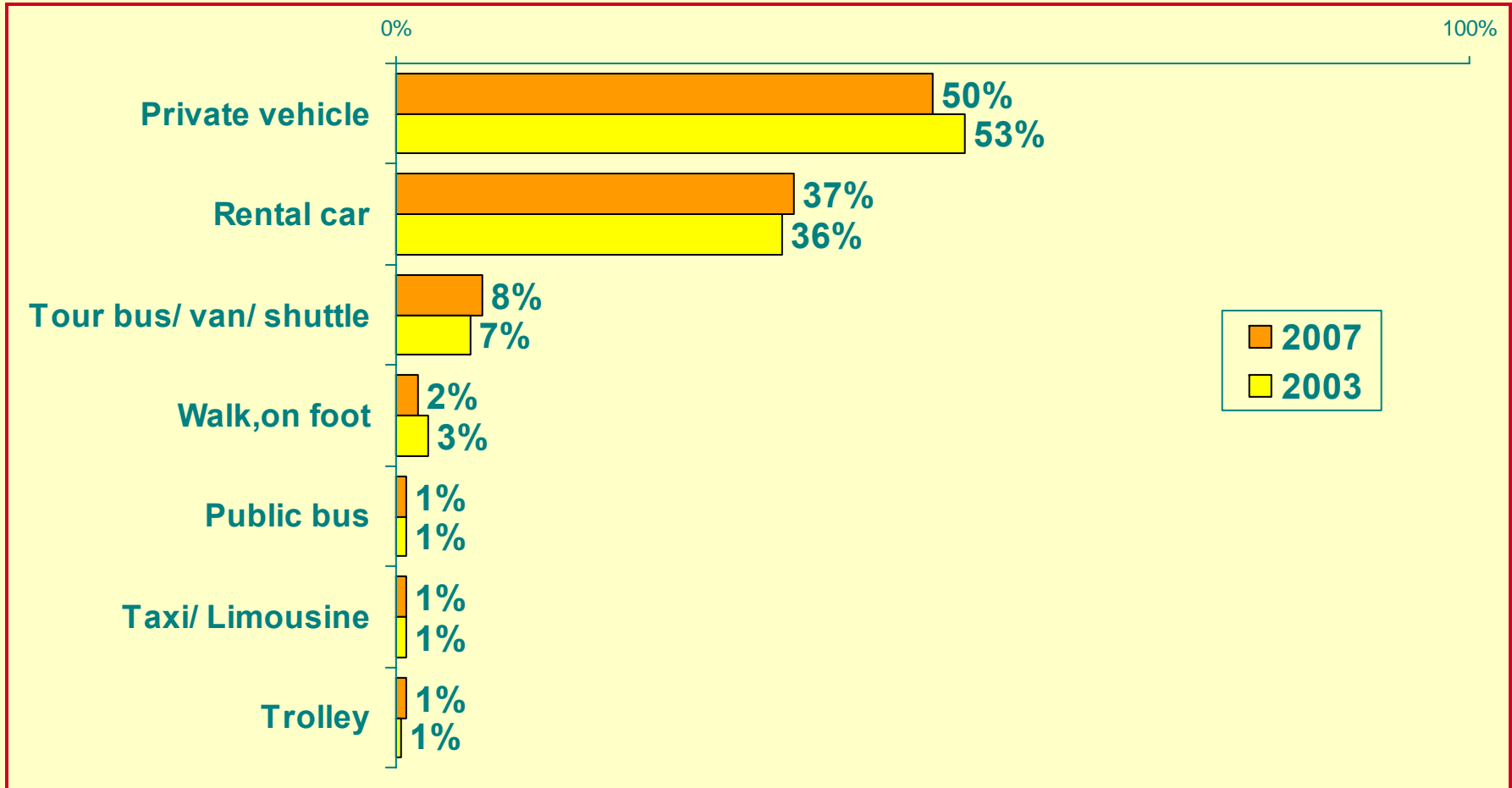
	O'AHU		HAWAI'I ISLAND		MAUI		KAUA'I	
	Resi-Dents	Out-of-State Visitors	Resi-dents	Out-of-State Visitors	Resi-dents	Out-of-State Visitors	Resi-dents	Out-of-State Visitors
Past personal experience	77%	26%	69%	15%	67%	16%	67%	17%
Advice from friends/relatives	24%	28%	26%	21%	27%	18%	23%	26%
By chance	6%	11%	12%	16%	15%	14%	9%	7%
Books/Magazines/Brochures	4%	27%	4%	41%	6%	45%	21%	50%
Internet	3%	9%	2%	10%	3%	8%	7%	12%
TV	1%	1%	1%	1%	1%	4%	5%	6%
Tour company	2%	17%	1%	5%	2%	8%	1%	5%
Newspaper	1%	1%	1%	1%	0%	1%	2%	1%
Hotel Concierge/Activity Desk	0%	6%	2%	13%	1%	9%	3%	17%
Travel agent	0%	4%	0%	3%	0%	3%	1%	6%
Base	707	1,386	597	1,138	220	511	390	2,381

Q10: Where did you get information about this park?

BEHAVIORAL ANALYSIS

Transportation Sources (Tracking)

Means of transportation to parks shows no significant changes over 2003. Private vehicles and rental cars are still the main sources.

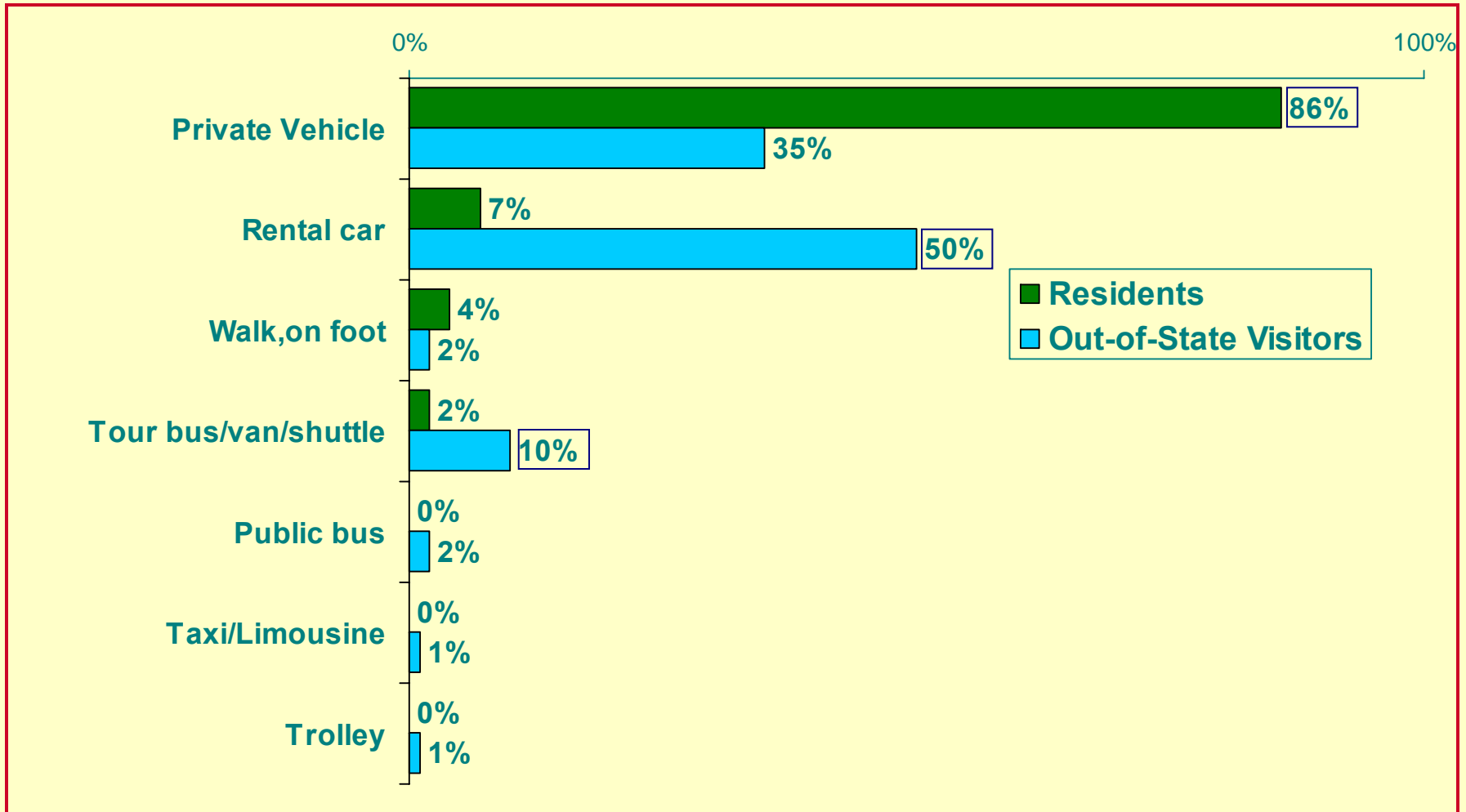


Base: 2007 (7,340); 2003 (11,658)

Q11: To get to this park today, which means of transportation did you see?

Transportation Sources by Segment (2007)

Half of non-resident park visitors get there by rental cars and a third by private vehicles. Only a tenth use tour transportation.



Base: Residents (1,941); Visitors (5,399)

Q11: To get to this park today, which means of transportation did you see?

Transportation Sources by Island and Segment (2007)

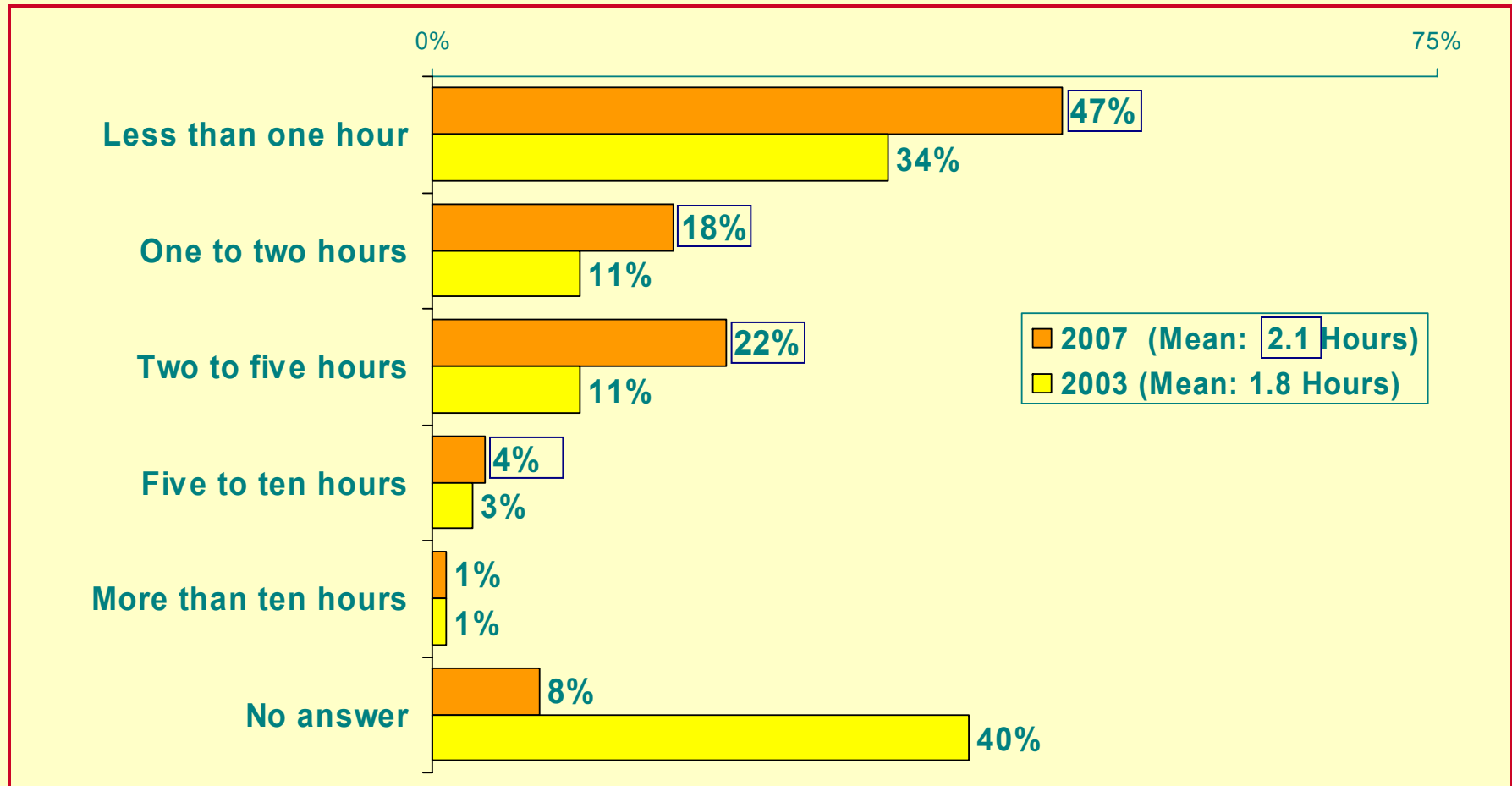
Hawai'i Island residents are more likely to go to parks on foot. Out-of-state visitors on O'ahu are more likely to go by tour bus and public bus.

	O'AHU		HAWAI'I ISLAND		MAUI		KAUA'I	
	Resi-dents	Out-of-State Visi-tors	Resi-dents	Out-of-State Visi-tors	Resi-dents	Out-of-State Visi-tors	Resi-dents	Out-of-State Visi-tors
Private Vehicle	91%	35%	86%	38%	87%	43%	70%	30%
Rental car	2%	28%	5%	57%	9%	47%	24%	63%
Walk, on foot	5%	5%	6%	1%	2%	0%	2%	1%
Tour bus/van/shuttle	2%	22%	2%	4%	2%	8%	2%	6%
Public bus	0%	6%			1%	0%	1%	0%
Taxi/Limousine		2%	1%	0%	0%	0%	1%	0%
Trolley		3%	1%					
Base	709	1,380	606	1,141	231	519	395	2,359

Q11: To get to this park today, which means of transportation did you see?

Length of Stay at Park (Tracking)

Park utilization is not only up in terms of the number of visitors but also in terms of length of stay. Park users are staying 17% longer in 2007 than in 2003, averaging 2.1 hours.

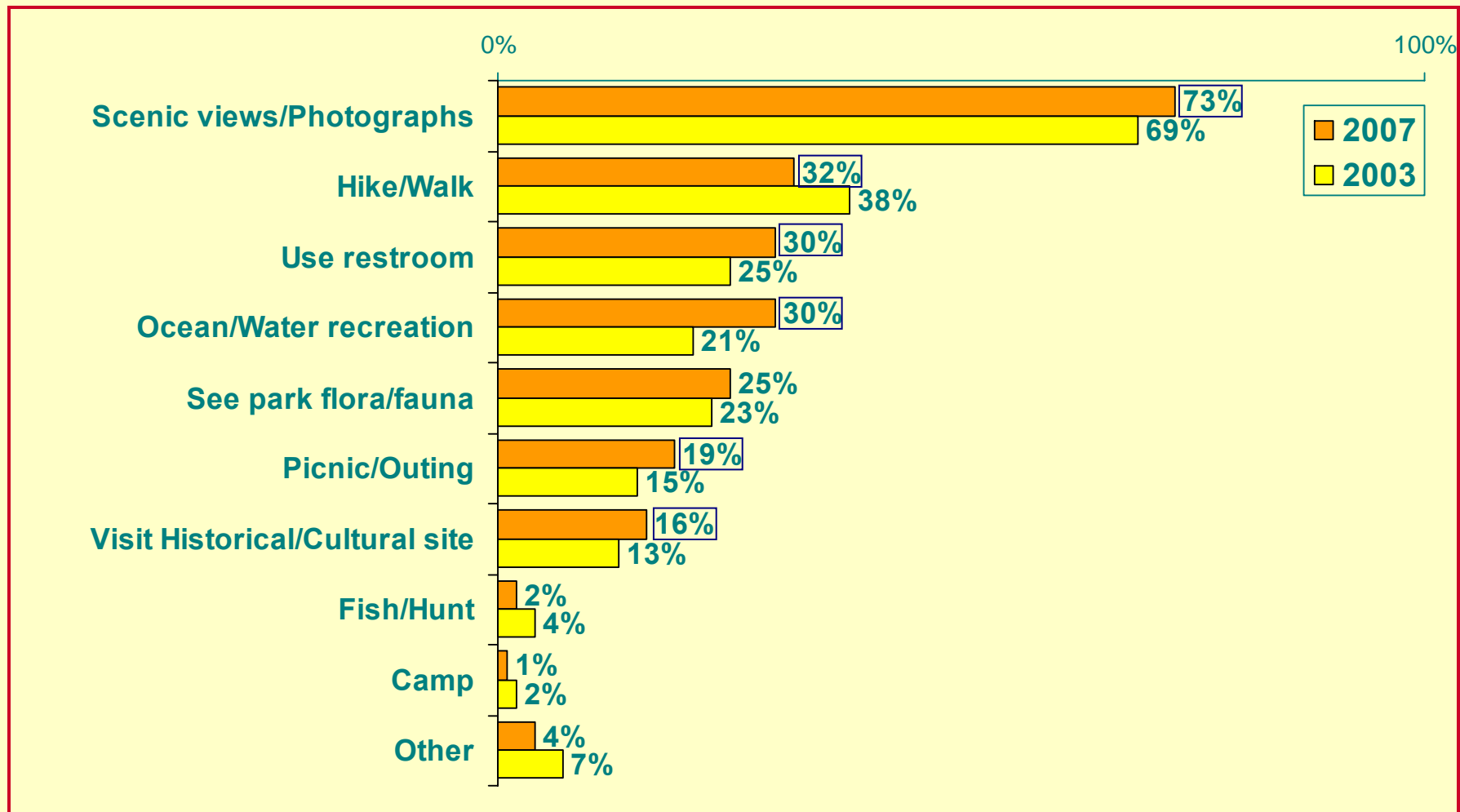


Base: 2007 (7,188); 2003 (11,658)

Q5: Today, how long did you stay at the park?

Park Activities: Statewide (Tracking)

Park activities have changed: More users enjoy the scenery, use restrooms, do ocean or water recreation, picnic or visit historical/cultural sites. Fewer hike parks.

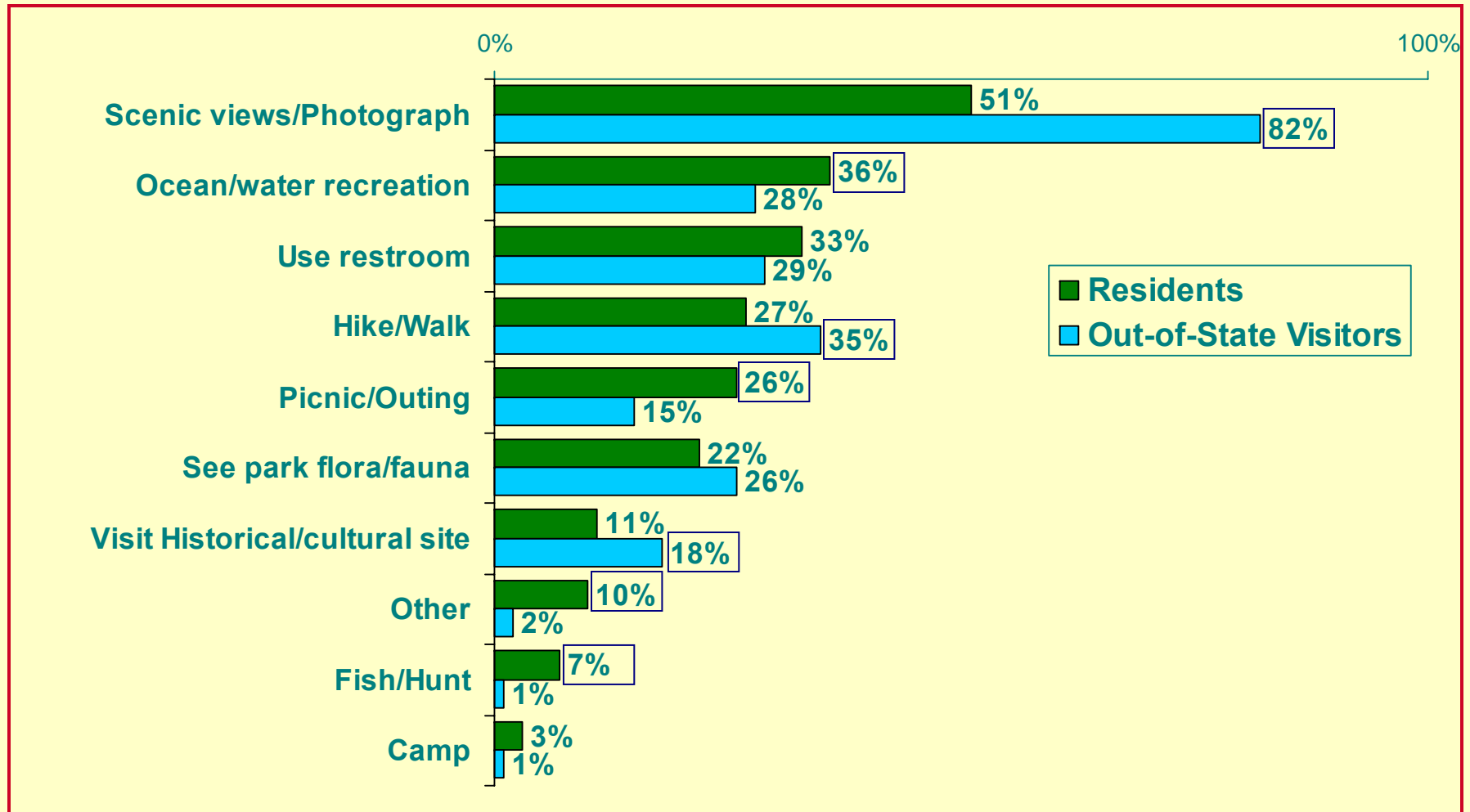


Base: 2007 (7,490), 2003 (11,658)

Q6: What did you actually do during the today's visit?

Park Activities by Segment (2007)

Except for hiking, residents tend to engage in more active or social activities at parks. Most non-residents enjoy the scenery.

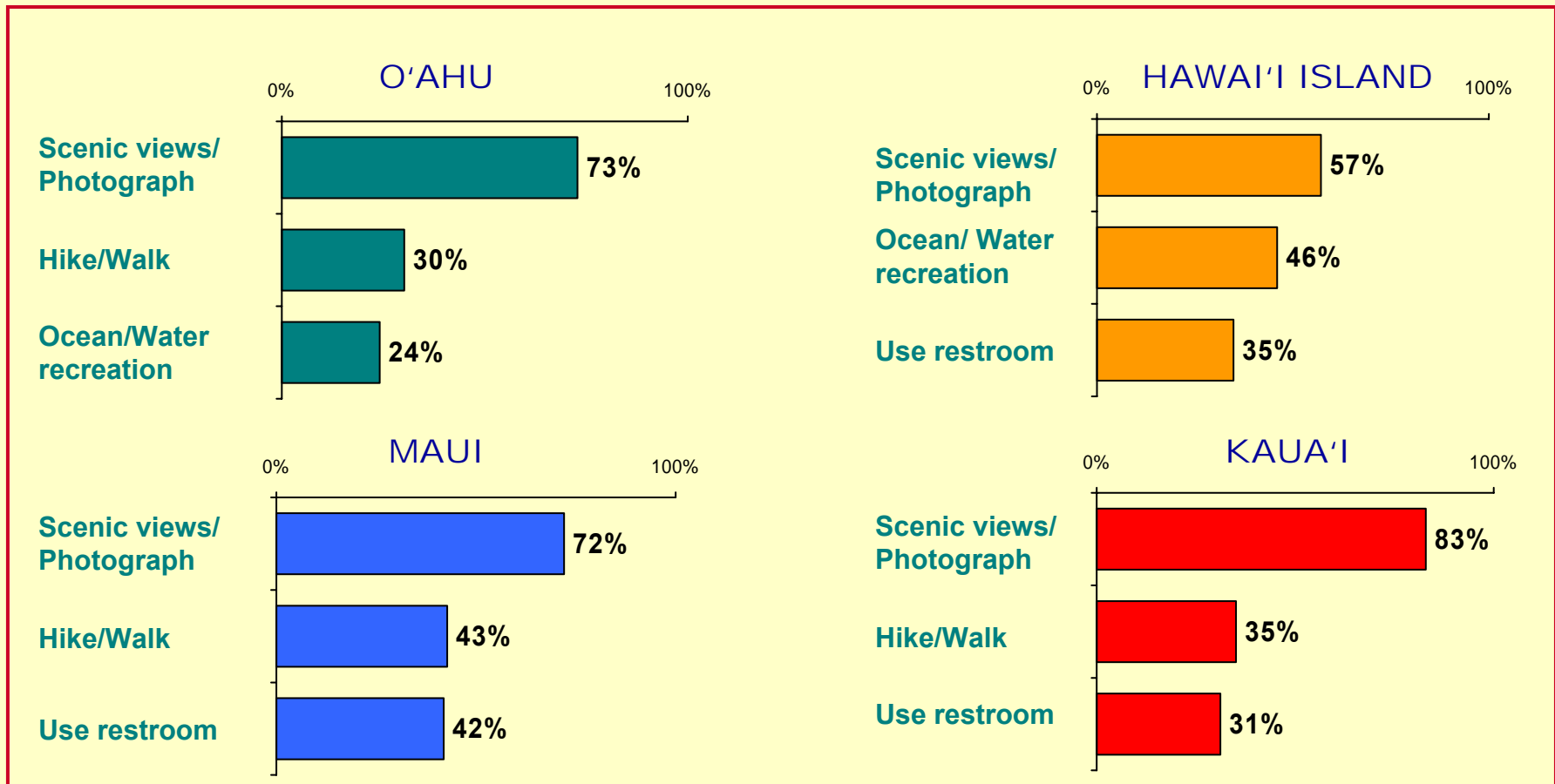


Base: Residents (1,970); Visitors (5520)

Q6: What did you actually do during the today's visit?

Park Activities Top 3 by Island (2007)

Activity patterns are similar across all Islands.



Base: O'ahu (2,130); Hawai'i Island (1,791); Maui (771); Kaua'i (2,798)

Q6: What did you actually do during the today's visit?

Park Activities by Island (Tracking)

	O'AHU		HAWAI'I ISLAND		MAUI		KAUA'I	
	2003	2007	2003	2007	2003	2007	2003	2007
Scenic views/ Photographs	64%	73%	54%	57%	73%	72%	77%	83%
Hike/Walk	27%	30%	32%	24%	47%	43%	48%	35%
Use restroom	18%	21%	31%	35%	30%	42%	29%	31%
See park flora/fauna	12%	24%	22%	20%	40%	27%	27%	28%
Ocean/Water recreation	13%	18%	22%	46%	32%	38%	24%	29%
Visit Historical/ Cultural site	14%	22%	8%	7%	17%	15%	12%	16%
Fish/Hunt	4%	2%	2%	3%	1%	1%	6%	3%
Picnic/Outing	15%	10%	16%	26%	16%	19%	16%	23%
Camp	3%	1%	1%	2%	1%	3%	3%	1%
Other	9%	6%	10%	6%	8%	5%	5%	2%
Base	5,844	2,130	2,027	1,790	717	771	3,069	2,798

Q6: What did you actually do during the today's visit?

Park Activities by Island and Segment (2007)

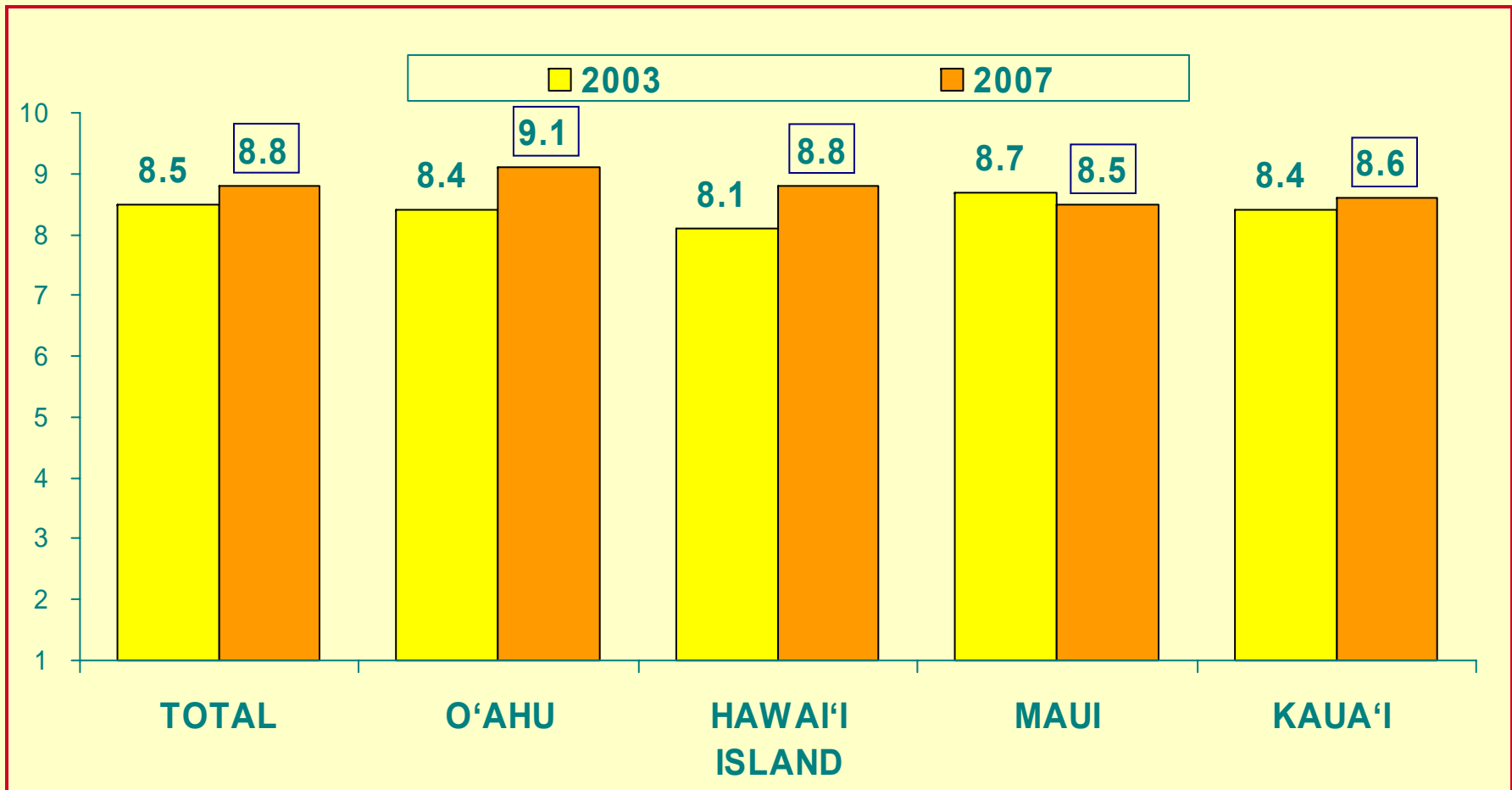
	O'AHU		HAWAI'I ISLAND		MAUI		KAUA'I	
	Resi-dents	Out-of-State Visi-tors	Resi-dents	Out-of-State Visi-tors	Resi-dents	Out-of-State Visi-tors	Resi-dents	Out-of-State Visi-tors
Scenic views/Photograph	58%	82%	38%	72%	50%	81%	58%	87%
Ocean/water recreation	28%	12%	43%	49%	48%	33%	27%	29%
Use restroom	29%	16%	39%	32%	35%	45%	30%	32%
Hike/Walk	25%	32%	21%	26%	43%	43%	28%	37%
Picnic/Outing	20%	4%	38%	16%	23%	17%	26%	22%
See park flora/fauna	25%	23%	19%	22%	22%	29%	21%	29%
Visit Historical/cultural site	14%	27%	3%	10%	19%	14%	14%	16%
Fish/Hunt	5%	0%	6%	1%	3%	0%	19%	1%
Camp	1%	0%	4%	0%	5%	2%	3%	1%
Other	12%	2%	11%	2%	10%	2%	4%	2%
Base	721	1,409	623	1,168	231	540	395	2,403

Q6: What did you actually do during the today's visit?

SATISFACTION WITH PARK EXPERIENCE

Park User Satisfaction: Statewide (Tracking)

Despite more park volume, larger party sizes and users who stay longer, overall satisfaction is up 4% statewide. Further, satisfaction is up on all Islands except Maui. It has increased 8% on O'ahu; 9% on Hawai'i Island, and 2% on Kaua'i. Satisfaction has slipped 2% on Maui.

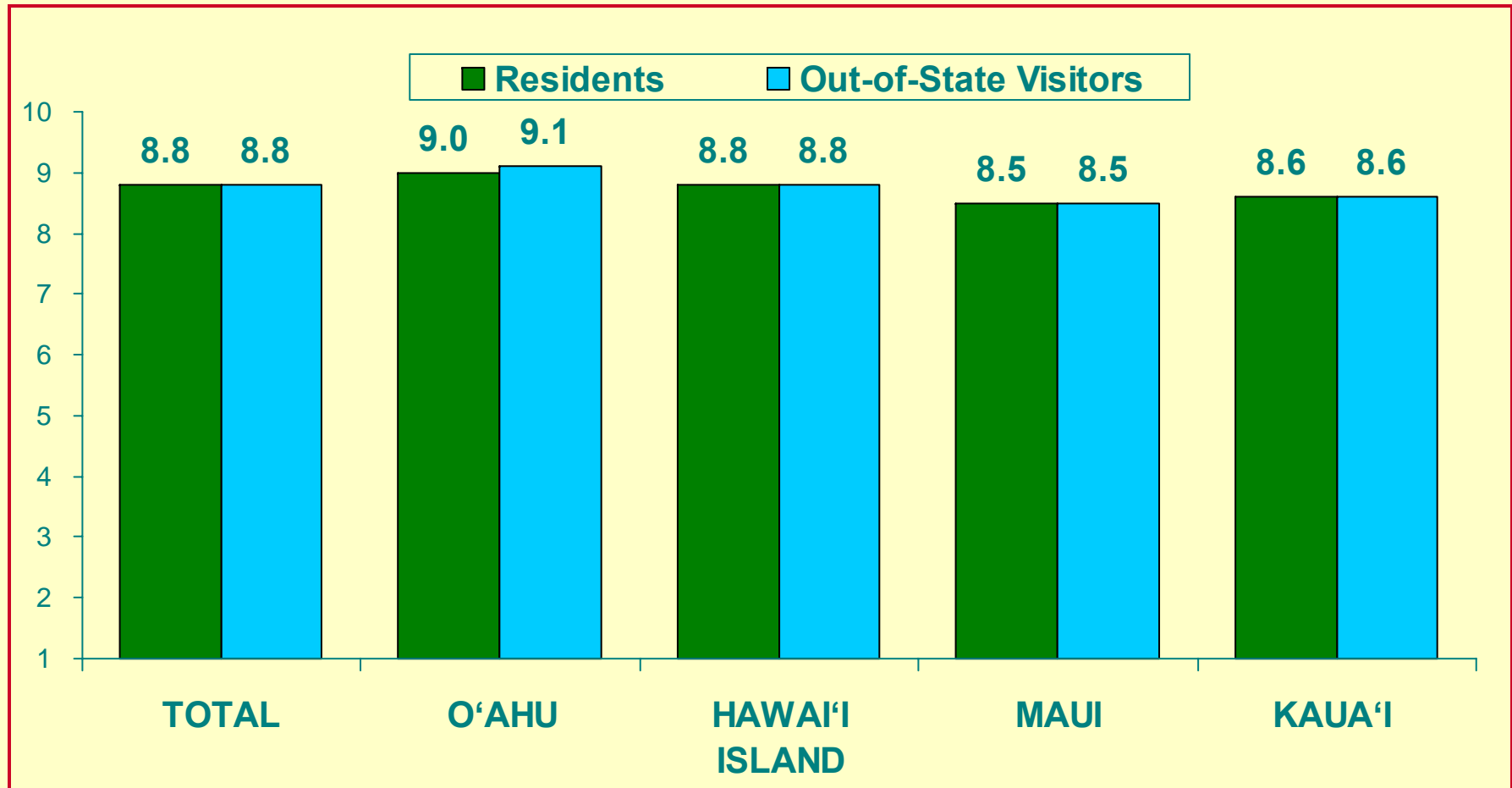


Base: 2007 (7,491); 2003 (11,658)

Q7: Overall, how satisfied were you with your visit to this park today, if 10 is outstanding satisfaction and 1 is not satisfied at all?

Park User Satisfaction by Island and Segment (2007)

Regardless of where park users are residents or out-of-state visitors, they share similar levels of satisfaction with parks overall.

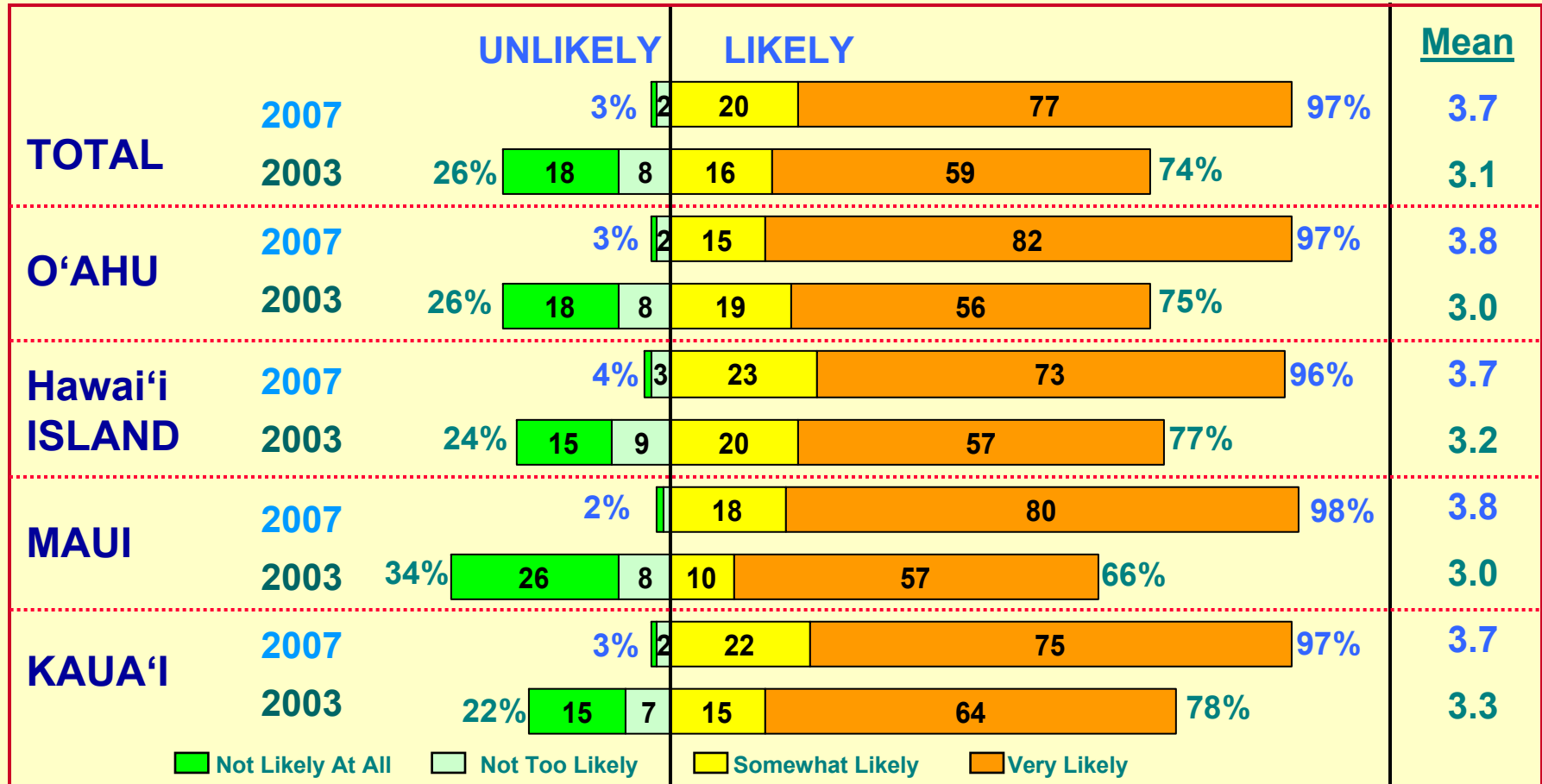


Base: Total (1,977/5,514); O'ahu (723/1,402); Hawai'i Island (632/1,189); Maui (229/533); Kaua'i (393/2,390)

Q7: Overall, how satisfied were you with your visit to this park today, if 10 is outstanding satisfaction and 1 is not satisfied at all?

Likelihood of Recommending: Statewide Tracking

Another indicator of satisfaction is advocacy. Advocacy scores are up across the entire system, and 19% statewide. Likelihood of recommending means have increased 27% on O'ahu and Maui; 16% on Hawai'i Island, and 12% on Kaua'i.



Base: 2007: Total (7,326); O'ahu (2,061); Hawai'i Island (1,788); Maui (763); Kaua'i (2,714)

2003: Total (11,658); O'ahu (5,844); Hawai'i Island (2,027); Maui (717); Kaua'i (3,069)

Q8: How likely are you to recommend a visit to this park to other family or friends? Are you...

Park Activities by Island (Tracking)

Details show that those very likely to recommend are driving strong increases in advocacy.

	O'AHU		HAWAI'I ISLAND		MAUI		KAUA'I	
	2003	2007	2003	2007	2003	2007	2003	2007
LIKELY	75%	97%	77%	96%	66%	98%	78%	97%
Very Likely	56%	82%	57%	73%	57%	80%	64%	75%
Somewhat Likely	19%	16%	20%	23%	10%	18%	15%	22%
UNLIKELY	26%	3%	24%	4%	34%	2%	22%	3%
Not Too Likely	8%	2%	9%	3%	8%	1%	7%	2%
Not Likely At All	18%	1%	15%	1%	26%	1%	15%	1%
Base	5,844	2,061	2,027	17,88	717	763	3,069	2,714

Q8: How likely are you to recommend a visit to this park to other family or friends? Are you...

Park Activities by Island and Segment (2007)

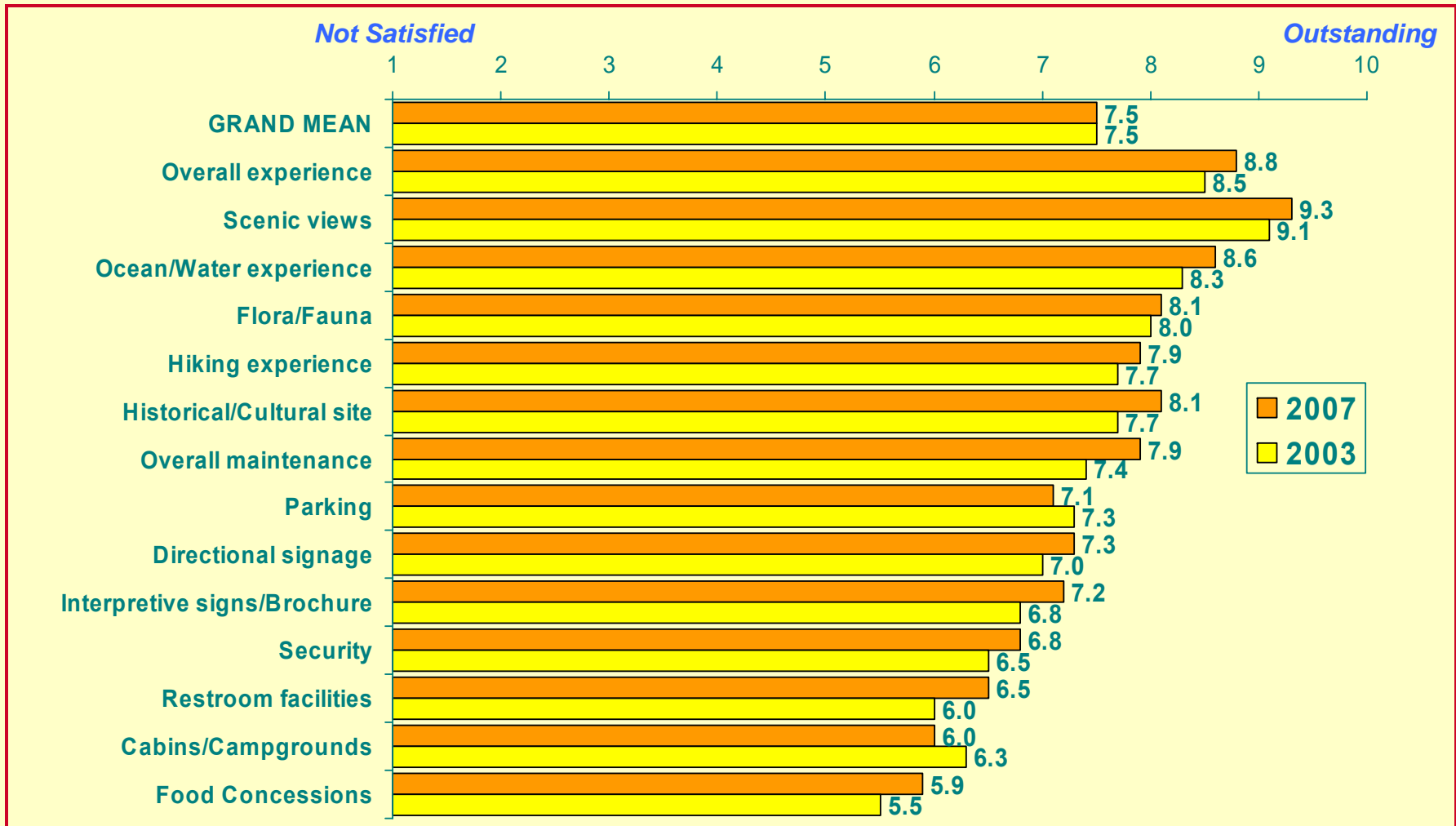
Non-residents tend to be somewhat more likely to recommend on Hawai'i Island and Kaua'i while the reverse is true on Maui.

	O'AHU		HAWAI'I ISLAND		MAUI		KAUA'I	
	Resi- dents	Out-of- State Visi- tors	Resi- dents	Out-of- State Visi- tors	Resi- dents	Out-of- State Visi- tors	Resi- dents	Out-of- State Visi- tors
LIKELY	97%	98%	94%	97%	98%	98%	97%	97%
Very Likely	80%	83%	69%	76%	89%	76%	67%	76%
Somewhat Likely	17%	15%	25%	21%	10%	22%	30%	21%
UNLIKELY	3%	2%	6%	3%	2%	2%	3%	3%
Not Too Likely	2%	2%	3%	3%	1%	1%	3%	2%
Not Likely At All	1%	0%	3%	0%	1%	1%	0%	1%
Base	705	1,356	616	1,172	230	533	387	2,327

Q8: How likely are you to recommend a visit to this park to other family or friends? Are you...

Attribute Satisfaction: Statewide (Tracking)

On 11 of 14 attributes, satisfaction ratings have increased significantly since 2003. Satisfaction ratings have increased 7% on overall maintenance and 5% on historical and cultural sites. Parking and cabins declines are significant while the ratings on security is directional.

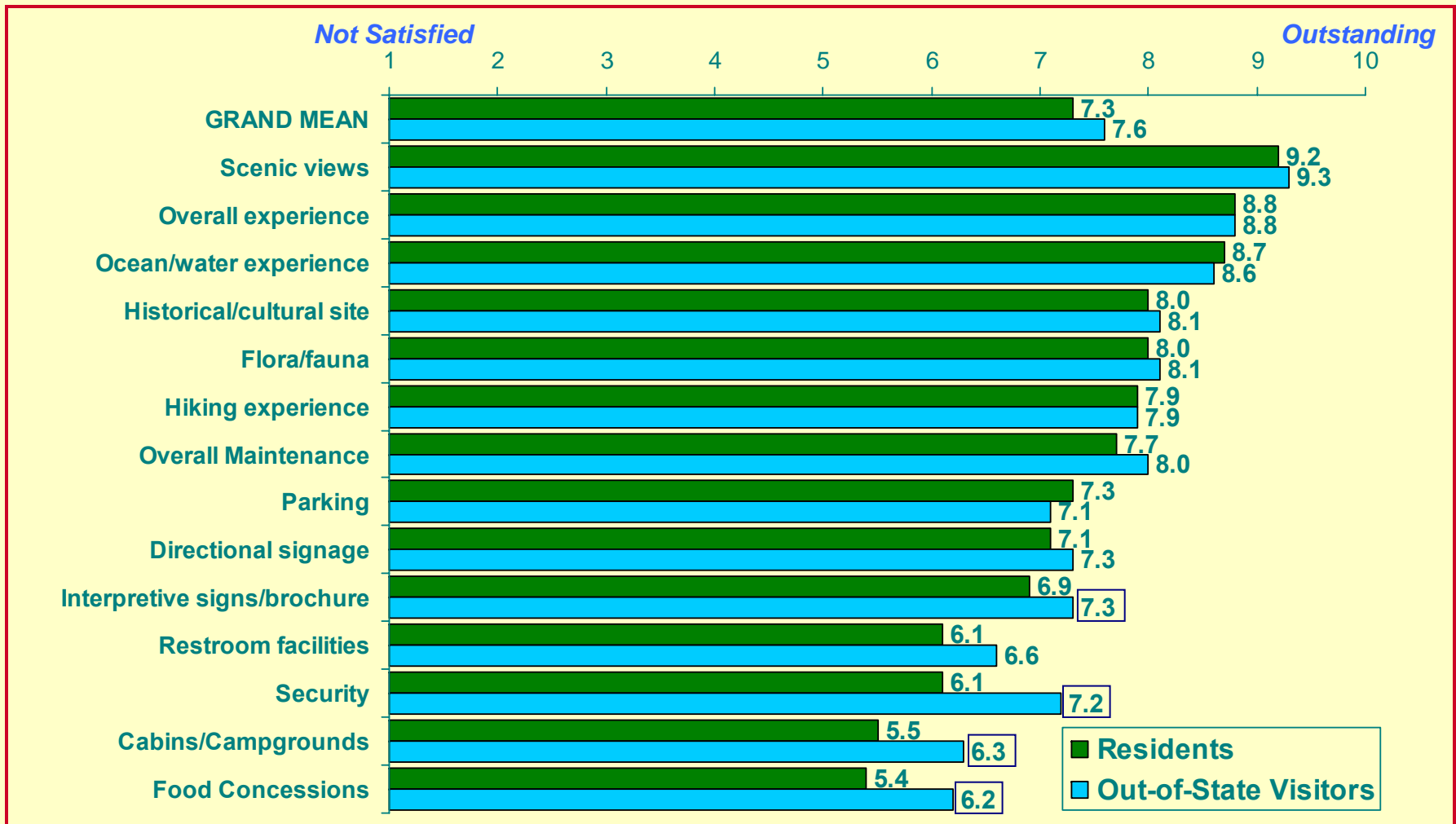


Base: 2007 (7,645); 2003 (11,658)

Q9: Thinking about your park experience today, on a scale of 1 to 10, with 10 being outstanding satisfaction and 1 being not satisfied at all, how satisfied were you with each of the following?

Attribute Satisfaction by Segment (2007)

Residents and visitors share similar perspectives on satisfaction, except for higher visitor satisfaction on interpretive signs, security, cabins and food.



Base: Residents (2,020); Visitors (5,625)

Q9: Thinking about your park experience today, on a scale of 1 to 10, with 10 being outstanding satisfaction and 1 being not satisfied at all, how satisfied were you with each of the following?

Attribute Satisfaction by Island (Tracking)

Detailed comparisons reinforce the longitudinal increases in park satisfaction.

	O'AHU		HAWAI'I ISLAND		MAUI		KAUA'I	
	2003	2007	2003	2007	2003	2007	2003	2007
Overall experience	8.4	9.1	8.1	8.8	8.7	8.5	8.4	8.6
Scenic views	9.0	9.4	8.9	9.3	9.4	9.4	9.2	9.2
Ocean/Water experience	8.0	8.8	8.1	8.6	8.7	8.8	8.4	8.5
Flora/fauna	7.5	8.1	7.7	8.0	8.4	8.4	8.3	8.0
Hiking experience	7.3	7.9	7.3	7.5	7.9	7.9	8.0	8.2
Historical/Cultural site	7.8	8.4	7.2	7.5	8.0	7.7	7.6	8.1
Overall maintenance	7.7	8.4	6.7	7.8	7.9	7.5	7.1	7.6
Parking	7.8	8.0	7.6	7.4	7.7	7.5	6.6	6.0
Directional signage	7.1	7.9	6.8	7.1	7.3	7.1	6.8	7.0
Interpretive signs/ Brochure	7.0	7.8	6.1	6.7	7.0	7.0	6.8	6.9
Security	6.3	6.8	6.1	7.1	6.7	6.3	6.7	6.6
Restroom facilities	6.3	7.0	5.6	6.8	5.7	5.7	5.9	6.2
Cabins/Campgrounds	6.4	6.1	5.7	5.7	7.0	5.3	6.2	6.6
Food Concessions	5.3	6.3	5.2	5.8	6.0	5.5	5.5	6.0

Q9: Thinking about your park experience today, on a scale of 1 to 10, with 10 being outstanding satisfaction and 1 being not satisfied at all, how satisfied were you with each of the following?

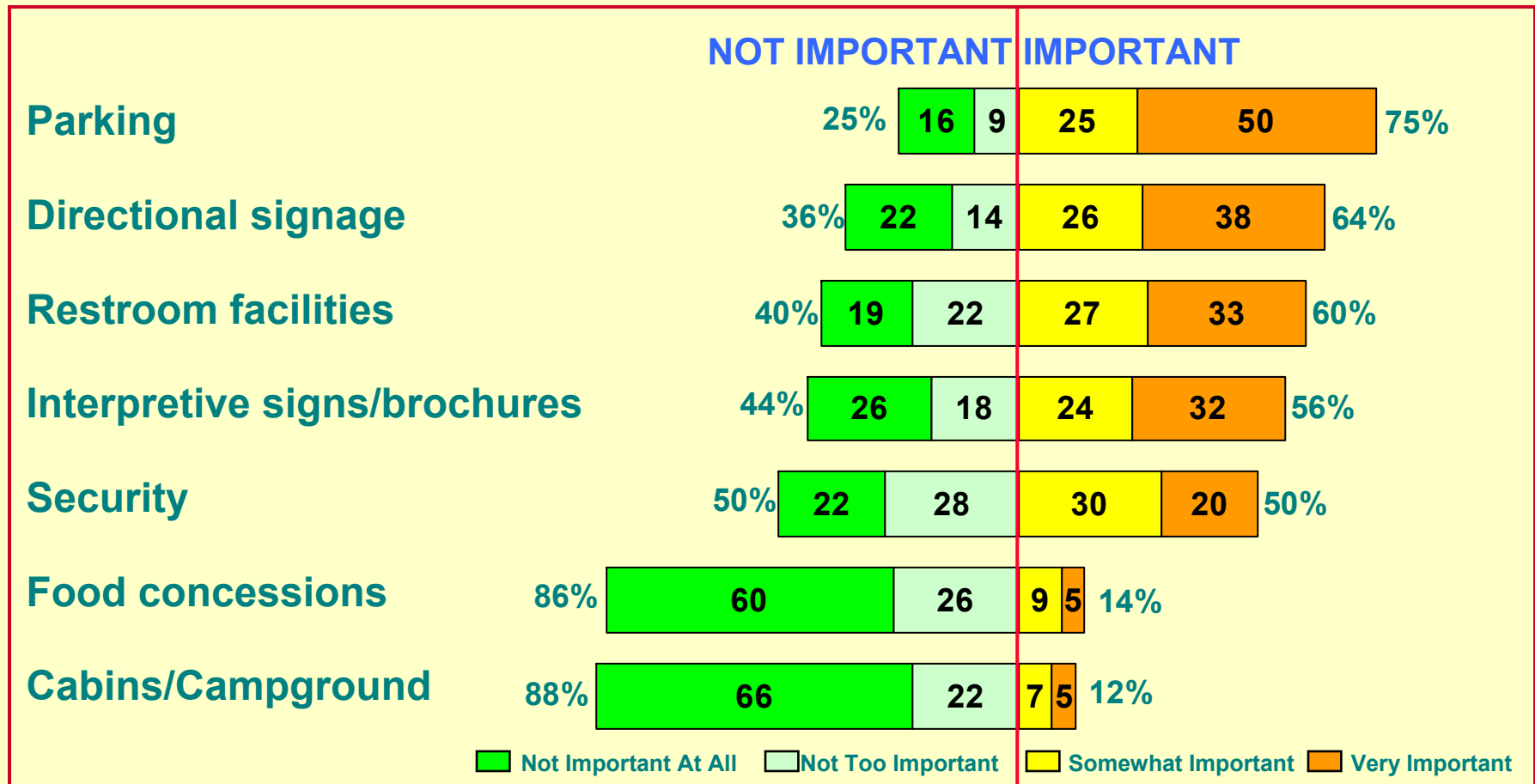
Attribute Satisfaction by Island and Segment (2007)

	O'AHU		HAWAI'I ISLAND		MAUI		KAUA'I	
	Resi- dents	Out-of- State Visi- tors	Resi- dents	Out-of- State Visi- tors	Resi- dents	Out-of- State Visi- tors	Resi- dents	Out-of- State Visi- tors
Scenic views	9.1	9.6	9.4	9.1	9.7	9.3	8.9	9.2
Overall experience	9.0	9.1	8.8	8.8	8.5	8.5	8.6	8.6
Ocean/water experience	8.7	8.8	8.5	8.7	9.3	8.5	8.5	8.5
Historical/cultural site	8.3	8.5	7.4	7.6	8.0	7.4	8.3	8.0
Flora/fauna	8.0	8.2	8.1	8.0	8.5	8.3	7.4	8.1
Hiking experience	7.7	8.0	7.8	7.2	8.4	7.6	8.2	8.2
Overall Maintenance	8.2	8.6	7.5	8.0	7.4	7.6	7.4	7.7
Parking	7.7	8.1	7.3	7.5	7.3	7.6	5.9	6.1
Directional signage	7.5	8.1	6.7	7.3	7.3	7.1	6.8	7.0
Interpretive signs/brochure	7.0	8.2	6.5	6.9	6.9	7.1	7.3	6.8
Restroom facilities	6.2	7.7	6.5	7.0	5.5	5.8	6.1	6.3
Security	6.2	7.8	5.6	6.8	6.3	6.7	6.2	7.1
Cabins/Campgrounds	5.5	6.7	5.7	5.7	5.0	5.6	6.2	6.8
Food Concessions	5.1	6.9	5.3	6.2	5.7	5.3	5.6	6.1

Q9: Thinking about your park experience today, on a scale of 1 to 10, with 10 being outstanding satisfaction and 1 being not satisfied at all, how satisfied were you with each of the following?

If not available, how important is the following...

For seven amenities that are not available at all parks, parking is clearly the most important. Half say this is “very important” compared with a third for signage, restrooms and interpretive materials.



Base: Varies
 Q9a. If not available, how important is ___ to make is available?

If not available, how important is the following...

Two thirds of visitors to Maui and Kaua'i parks say restrooms are very important, more than those rating parking as very important.

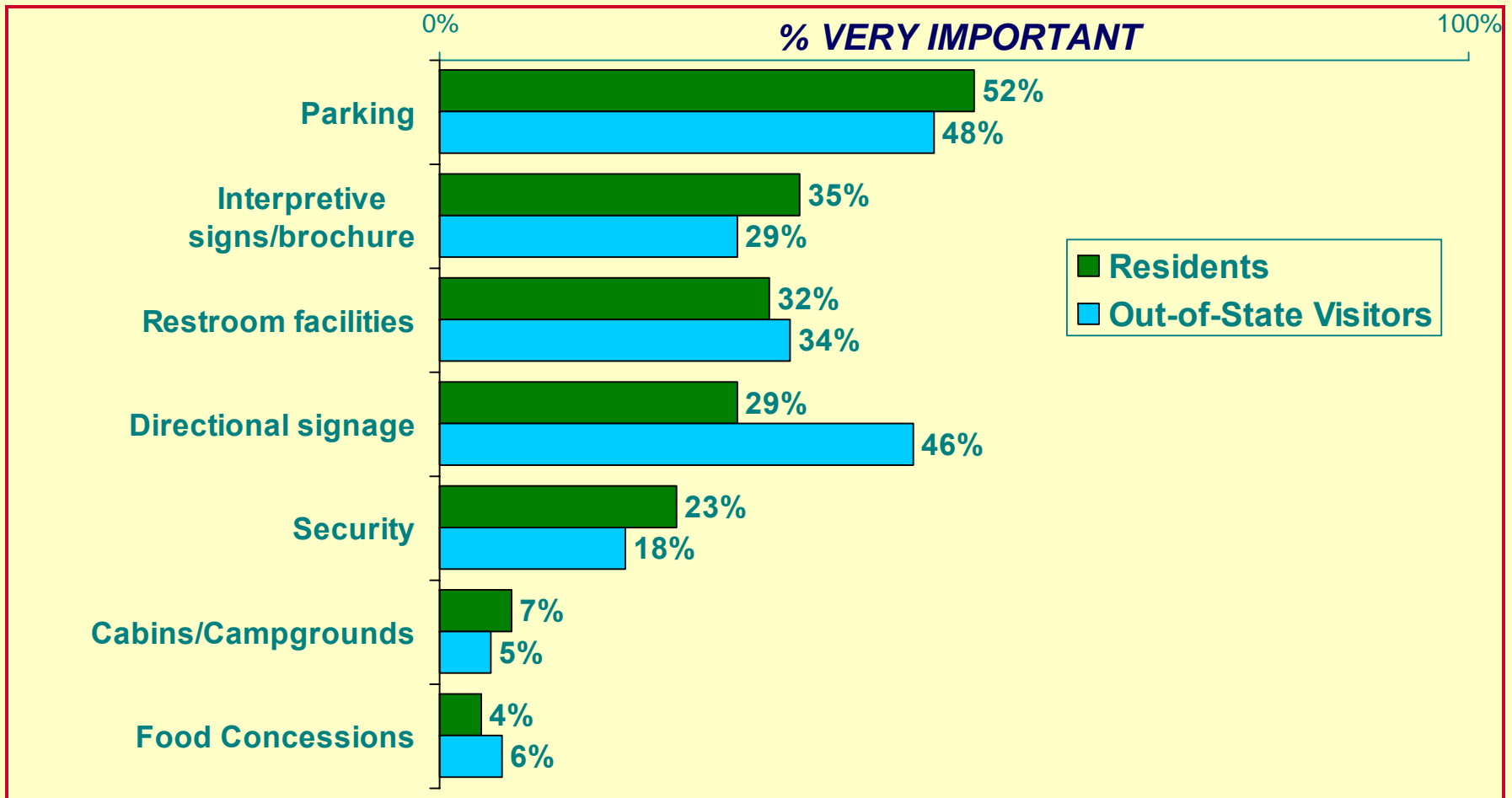
	% VERY IMPORTANT				
	TOTAL	O'AHU	HAWAII ISLAND	MAUI	KAUA'I
Parking	50%	50%		50%	51%
Directional signage	38%	44%			35%
Restroom facilities	33%	27%	44%	61%	67%
Interpretive signs/brochure	32%	45%	13%		13%
Security	20%	19%	28%	31%	16%
Cabins/Campgrounds	5%	5%	12%	11%	1%
Food Concessions	5%	4%	10%	6%	6%

Base: Varies

Q9a. If not available, how important is ___ to make is available?

If not available, how important is the following...

If certain amenities were not available at a park, the survey asked how important it is to make it available. Both residents and visitors feel parking is very important. While residents' second most important amenity is interpretive information, visitors feel directional signage is more important.



Base: Varies

Q9a. If not available, how important is ___ to make is available?

If not available, how important is the following...

	% VERY IMPORTANT							
	O'AHU		HAWAI'I ISLAND		MAUI		KAUA'I	
	Resi- dents	Out-of- State Visi- tors	Resi- dents	Out-of- State Visi- tors	Resi- dents	Out-of- State Visi- tors	Resi- dents	Out- of- State Visi- tors
Parking	59%	33%				100%		59%
Interpretive signs/ brochure	43%	47%	15%	11%			13%	13%
Restroom facilities	27%	27%		47%	55%	63%	71%	66%
Directional signage	34%	52%					77%	26%
Security	26%	14%	24%	36%	21%	41%		21%
Cabins/Campgrounds	4%	6%	22%	3%	23%		1%	1%
Food Concessions	2%	6%	9%	10%	12%			7%

Base: Varies

Q9a. If not available, how important is ___ to make is available?

ADVANCED ANALYSIS

Dimensions of Park Usage

Scenic, Experience, and Facilities are the three factors that drive park users' satisfaction. Scenic is more important for driving out-of-state visitors' satisfaction (61%), followed by Experience (27%), and facilities (11%). While not as important as out-of-state visitors, Scenic has more than half of total effect on residents' satisfaction on park. Facilities fall in second with 25% while Experience has smaller impact of 19%.

