

PORTRAIT OF AMERICAN TRAVELERS®

Spring 2023

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Methodology

MMGY Global's *Portrait of American Travelers*® deals exclusively with leisure travel. The travel trend information presented in this report was obtained from interviews with 4,530 U.S. adults in February 2023.

This report primarily focuses on those *Likely to Visit Hawaii*, defined as those who intend to take at least one overnight leisure trip during the next 24 months, have traveled by air in the past 18 months, and likely to visit Hawaii (4 or 5 on a 5-point scale). There were a total of 745 Likely Hawaii Visitors. At the bottom of each slide, the "Base" will detail the audience represented in the data.

Respondents were selected randomly and participated in a 20-minute online survey. The sample has been balanced by statistical weighting to ensure the data is representative of all leisure travelers in America.

The four generations of adults surveyed are defined below. Due to the small the number of Silent/GI respondents, we did not include their individual results in this report.

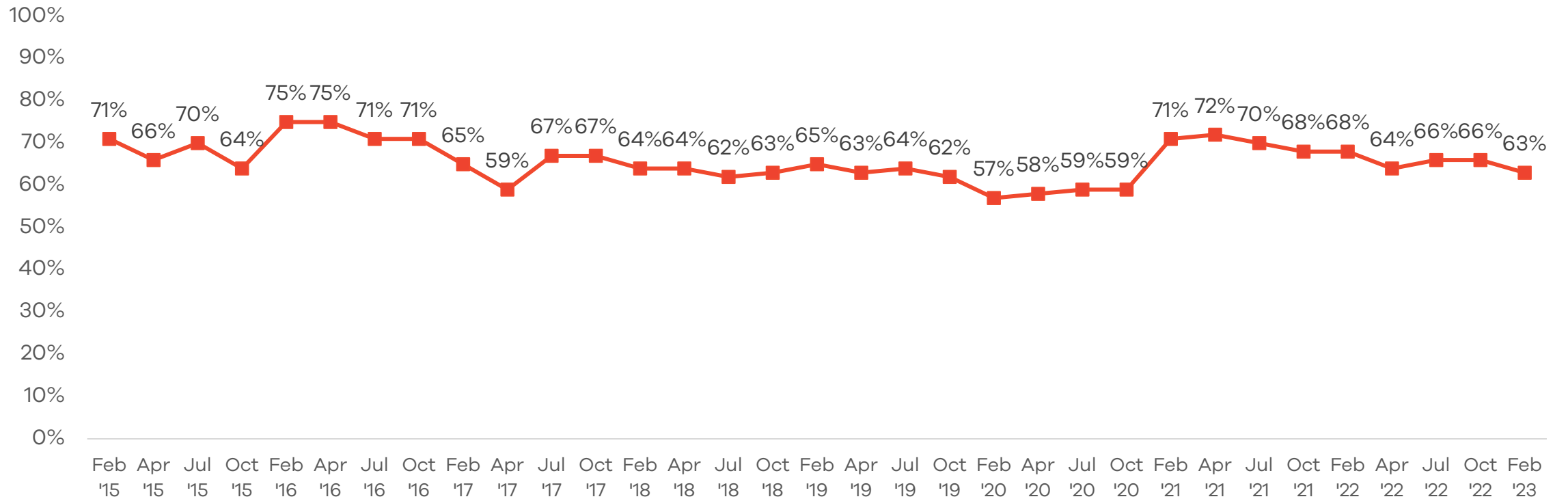
Generation	Age	% of Respondents
Gen Zs	18–24	12%
Millennials	25–40	29%
Gen Xers	41–56	24%
Boomers	57–75	31%
Silent/GI	75+	4%

Hawaii Tourism Proprietary Questions



Interest in Visiting Hawaii is Down Slightly from February '22.

Interest in Visiting Hawaii Next 2 Years
(Top 2 Box)

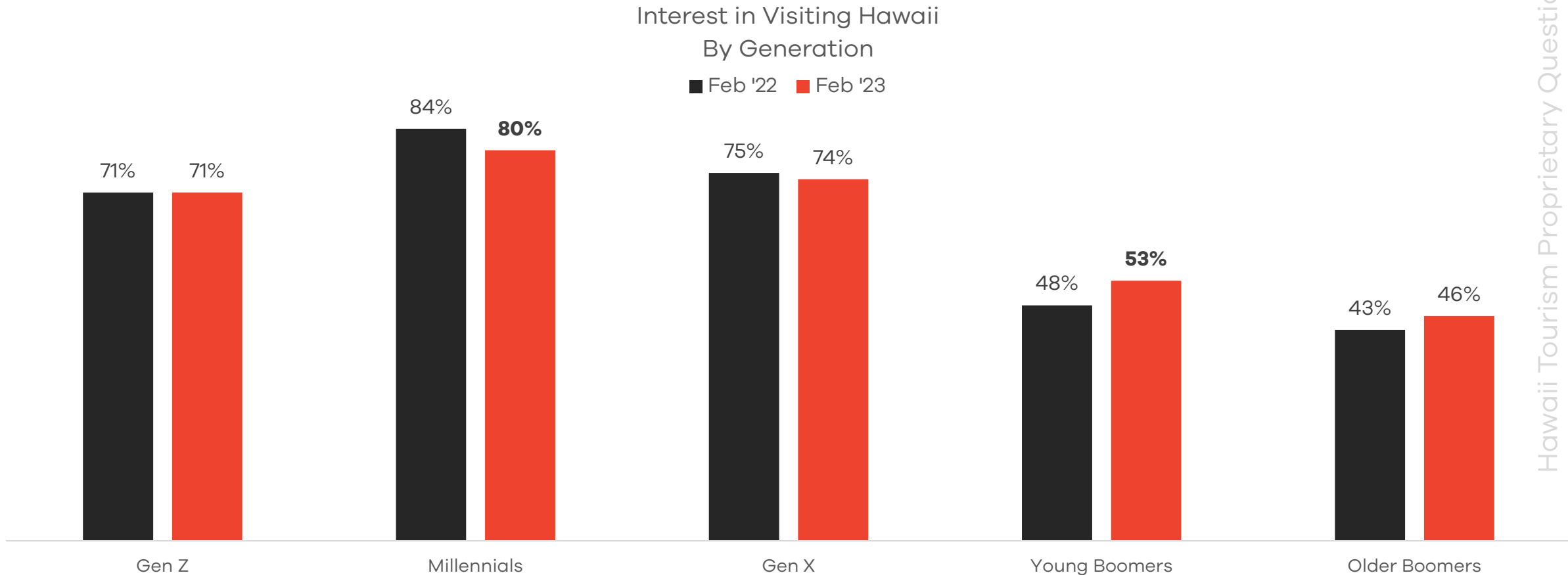


Hawaii Tourism Proprietary Questions

Base: Air Travelers (n=1,703)

Source: MMGY Global's 2023 Portrait of American Travelers® "Spring Edition"

Interest in Visiting Hawaii Remains High For Younger Generations

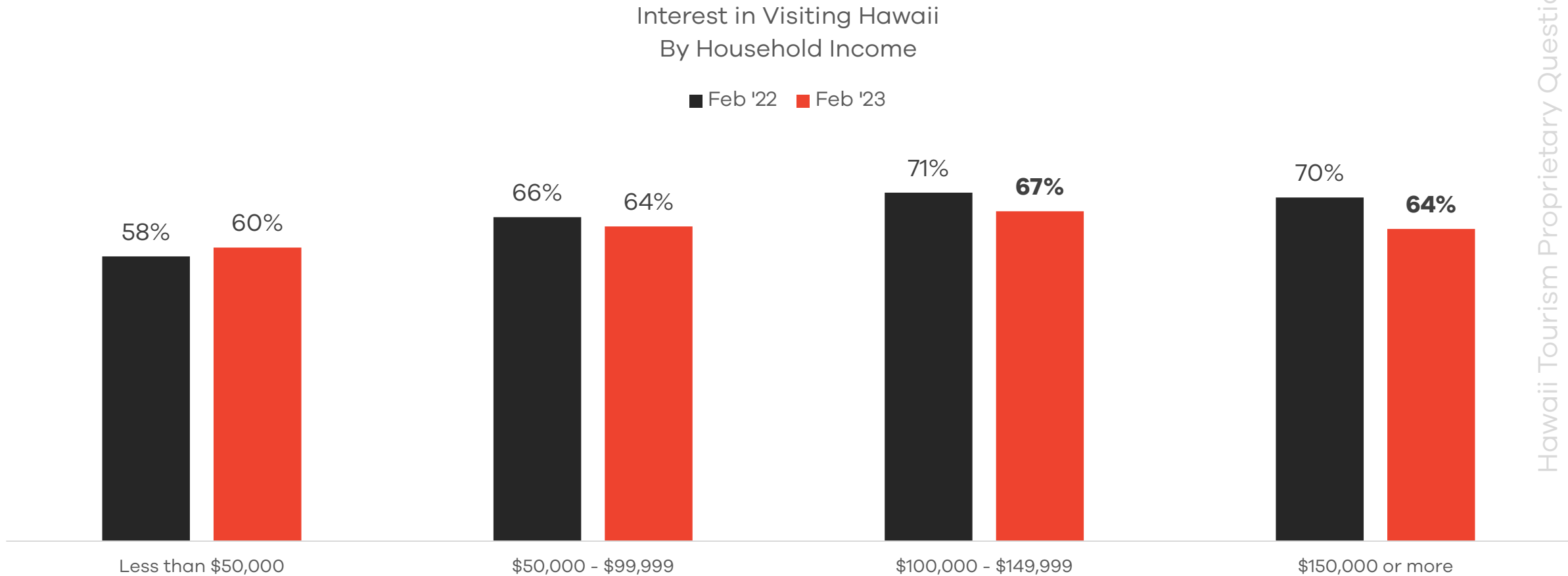


Data in bold indicates a significant difference from February 2022.

Base: Air Travelers (n=1,703)

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Spring Edition"

Despite a Decrease Among Those With Household Incomes of \$100,000 or More, Interest in Visiting Hawaii is Still Highest Among Those with Higher Household Incomes



Hawaii Tourism Proprietary Questions

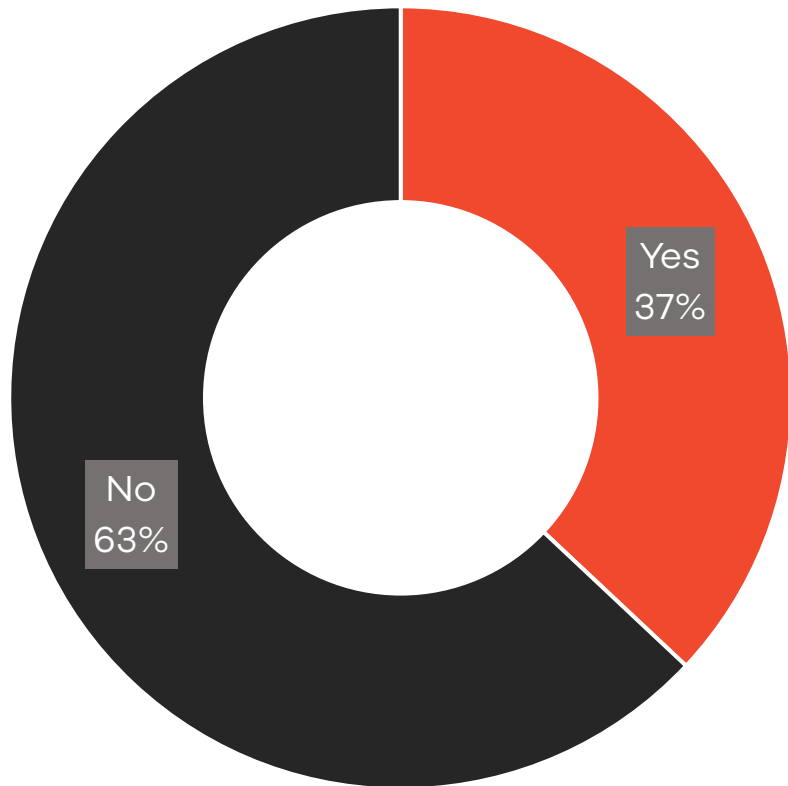
Data in bold indicates a significant difference from February 2022.

Base: Air Travelers (n=1,703)

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Spring Edition"

The Cost to Visit Hawaii Is The Most Cited Deterrent To Visiting

Considered Visiting Hawaii But Changed Mind



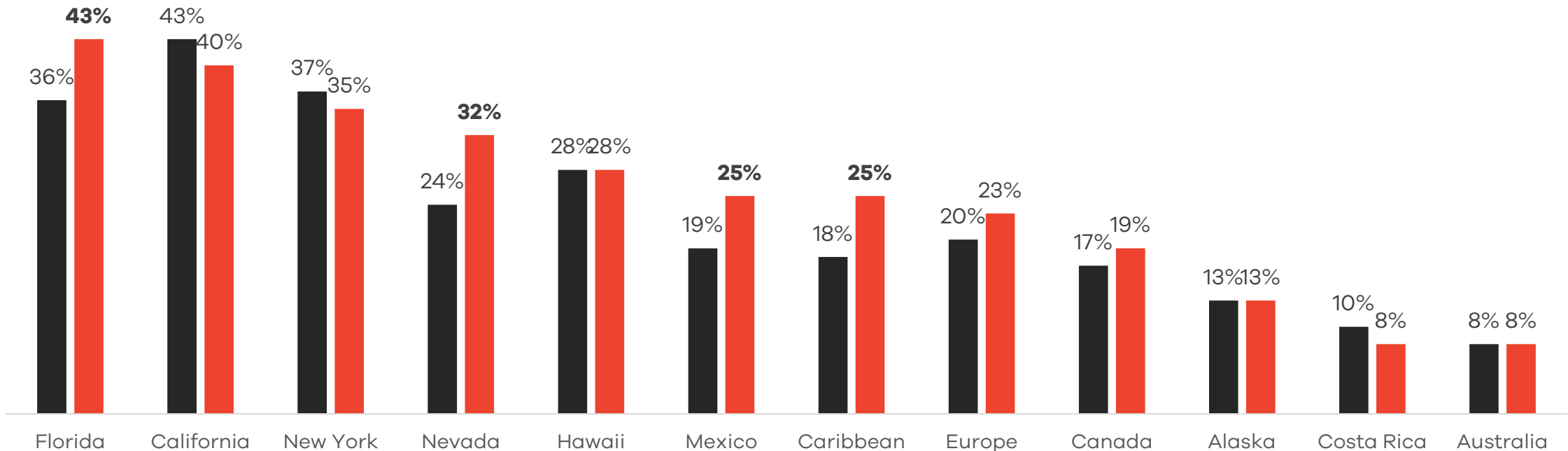
Reasons For Not Visiting Hawaii – Among Those Who Changed Their Mind	Feb '22	Feb '23
Price of airfare	25%	35%
Price of a vacation package	23%	33%
Price of the hotel	21%	29%
The flight to Hawaii is too long	19%	26%
Hawaii's COVID-19 travel restrictions	26%	23%
Better value at another destination	20%	19%
Already been and want to try another destination	16%	17%
Concerns about COVID-19 variants	22%	16%
Not enough time to travel to Hawaii	10%	15%
Hawaii is too crowded	13%	13%
Not sure which island(s) in Hawaii to visit	10%	10%
Hawaii is not unique enough	14%	8%
Accommodations were not available	10%	8%
Local people are not friendly	8%	8%
Hurricanes and tropical storms hitting Hawaii	12%	7%
Not enough activities in Hawaii	9%	5%
Hawaii is not exotic enough	7%	5%

Data in bold indicates a significant difference from February 2022.

Past Visitation To Florida, Nevada, Mexico And The Caribbean Increased From February 2022.

Destinations Visited in Past 3 Years
Among Those Likely to Visit Hawaii

■ Feb '22 ■ Feb '23

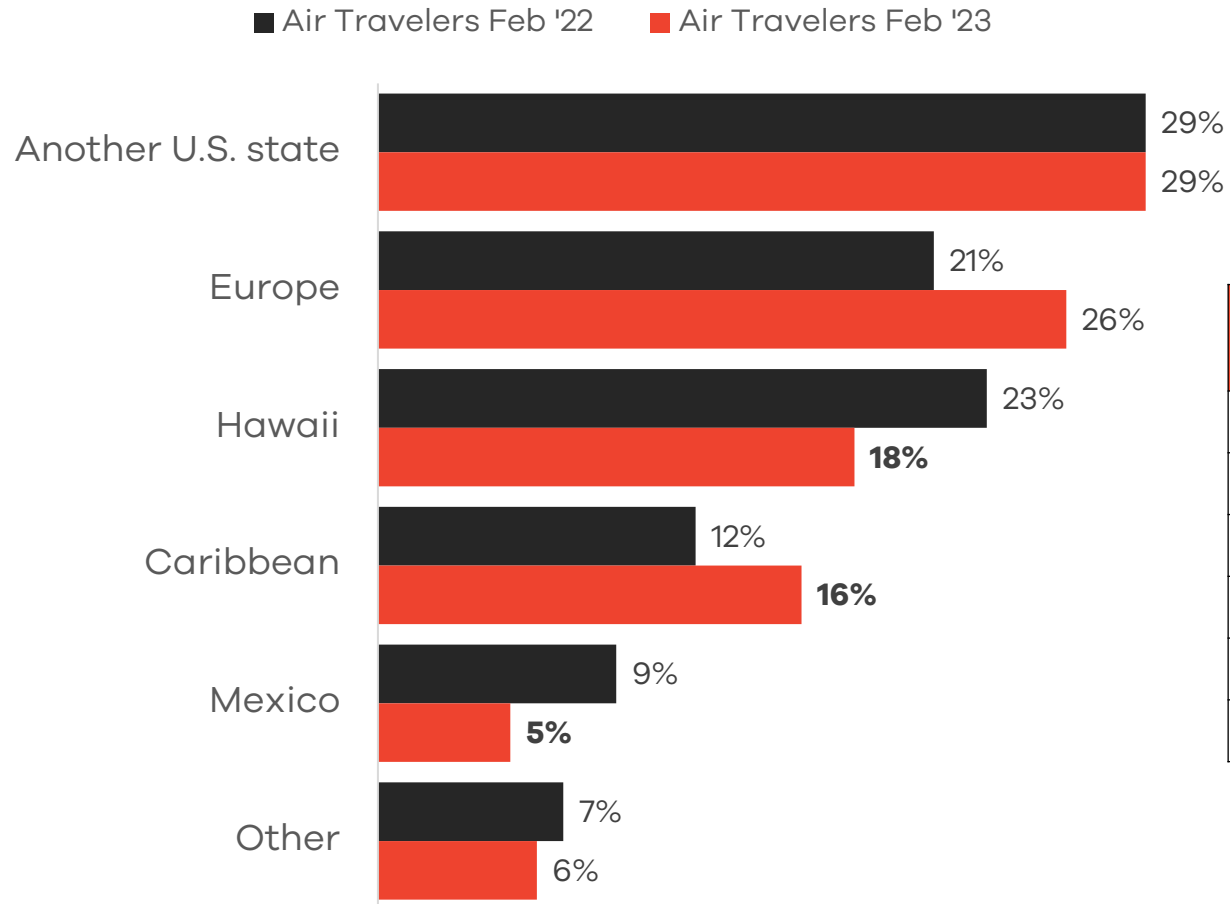


Data in bold indicates a significant difference from February 2022.

Base: Likely to Visit Hawaii (n=745)

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Spring Edition"

Compared to Feb '22, Fewer Air Travelers Are Interested in Visiting Hawaii When They Feel Safe To Take A Long-Haul Flight Again



Top Destinations of Interest Once Perceived Safe to Take a Long-Haul Flight Again

	U.S. Leisure Travelers	Air Travelers	Likely To Visit Hawaii
Hawaii	18%	18%	32%
Another U.S. state	34%	29%	21%
Europe	20%	26%	23%
Mexico	7%	5%	6%
Caribbean	14%	16%	15%
Other	8%	6%	3%

Data in bold indicates a significant difference from February 2022.

Base: U.S. Leisure Travelers (n=4,530), Air Travelers (n=1,703), Likely to Visit Hawaii (n=745)

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Spring Edition"



HAWAII TOURISM PROPRIETARY SUMMARY

KEY TAKEAWAY:

- Interest in visiting Hawaii is down slightly from last year. This decrease is seen among Millennials, and those with household incomes more than \$100,000.
- Among those who planned to visit Hawaii but changed their mind, the most cited reasons for doing so are the costs associated to visit Hawaii.

WHAT IT MEANS:

Despite a small decrease from this time last year, interest in visiting Hawaii is still higher than we've seen in recent years (pre-2021). Although COVID-19 restrictions continue to ease, it will be important to keep an eye on rising travel prices as the cost to visit Hawaii is the most cited deterrent to visit and this could continue to grow.



The Hawaii Prospect

Self-Described Personas

	U.S. Leisure Travelers	Likely Hawaii Visitors
Beach lover	40%	49%
Foodie	38%	45%
Family traveler	35%	36%
Pet lover	36%	35%
Travel bargain hunter	30%	35%
World traveler	23%	34%
Sports fan/enthusiast	28%	34%
Theme park enthusiast	25%	33%
Outdoor adventurer	27%	32%
Cruise lover	21%	29%
Luxury traveler	17%	27%
All-inclusive enthusiast	20%	27%
Environmentally-conscious	21%	26%
Moderate	24%	25%
Concert/festival enthusiast	19%	24%
Wine enthusiast	17%	23%
Liberal	19%	23%
Conservative	23%	17%
Recreational cannabis user	13%	17%
Ski/snowboard enthusiast	7%	14%
Social justice activist	8%	13%
Golf enthusiast	8%	11%
Road warrior	6%	10%

Data in bold indicates a significant difference from U.S. Leisure Travelers

Base: U.S. Leisure Travelers (n=4,530), Likely to Visit Hawaii (n=745)

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Spring Edition"

Demographics

	U.S. Leisure Travelers	Likely Hawaii Visitors
Male	48%	56%
Female	50%	42%
Other	1%	1%
Gen Zs	12%	9%
Millennials	29%	43%
Gen Xers	24%	25%
Young Boomers	18%	13%
Older Boomers	14%	10%
Have children under 18 at home	28%	48%
White	72%	71%
Hispanic	17%	24%
African American/Black	14%	15%
Asian	8%	9%
Native American	3%	6%
Pacific Islander	2%	2%
Other	4%	5%

Data in bold indicates a significant difference from U.S. Leisure Travelers

Base: U.S. Leisure Travelers (n=4,530), Likely to Visit Hawaii (n=745)

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Spring Edition"

Demographics

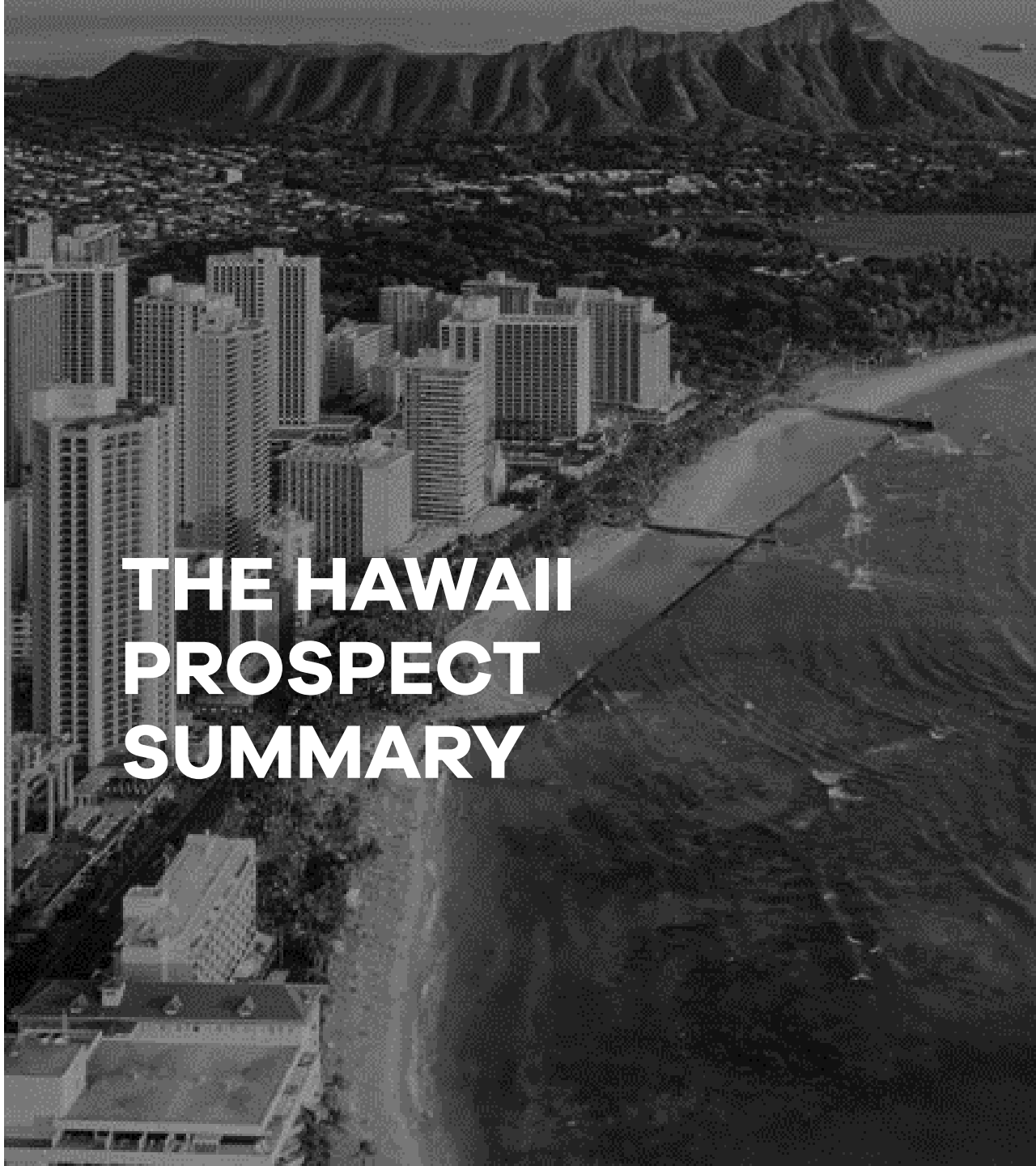
	U.S. Leisure Travelers	Likely Hawaii Visitors
Under \$30,000	15%	3%
\$30,000 - \$49,999	13%	6%
\$50,000 - \$74,999	17%	13%
\$75,000 - \$99,999	11%	14%
\$100,000 - \$124,999	10%	13%
\$125,000 - \$149,999	8%	14%
\$150,000 - \$249,999	19%	29%
\$250,000 - \$499,999	3%	6%
\$500,000 or more	2%	2%
4 years or less of high school	39%	22%
1-3 years of college	26%	24%
4 years of college	22%	34%
Some graduate school	3%	4%
Graduate/professional degree	10%	17%

Data in bold indicates a significant difference from U.S. Leisure Travelers

Demographics

	U.S. Leisure Travelers	Likely Hawaii Visitors
South	38%	36%
West	24%	29%
Midwest	21%	19%
Northeast	17%	19%
Employed (full or part-time)	53%	73%
Retired	25%	16%
Temporarily unemployed	8%	2%
Homemaker full-time	9%	5%
Student	4%	4%
Married/living together	61%	71%
Never married	25%	20%
Divorced/separated/widowed	14%	8%

Data in bold indicates a significant difference from U.S. Leisure Travelers



THE HAWAII PROSPECT SUMMARY

KEY TAKEAWAY:

- Likely Hawaii Visitors describe themselves as a Beach Lover, Foodie and Family Traveler. They are more likely than the average U.S. Leisure Traveler to describe themselves as a Beach Lover, Foodie, Travel Bargain Hunter, World Traveler, Sports Fan Enthusiast, and Theme Park Enthusiast, among others.
- Compared to U.S. Leisure Travelers, Likely Hawaii Visitors are younger, well-educated, and have higher household incomes. They also are more likely to be married and have children.

WHAT IT MEANS:

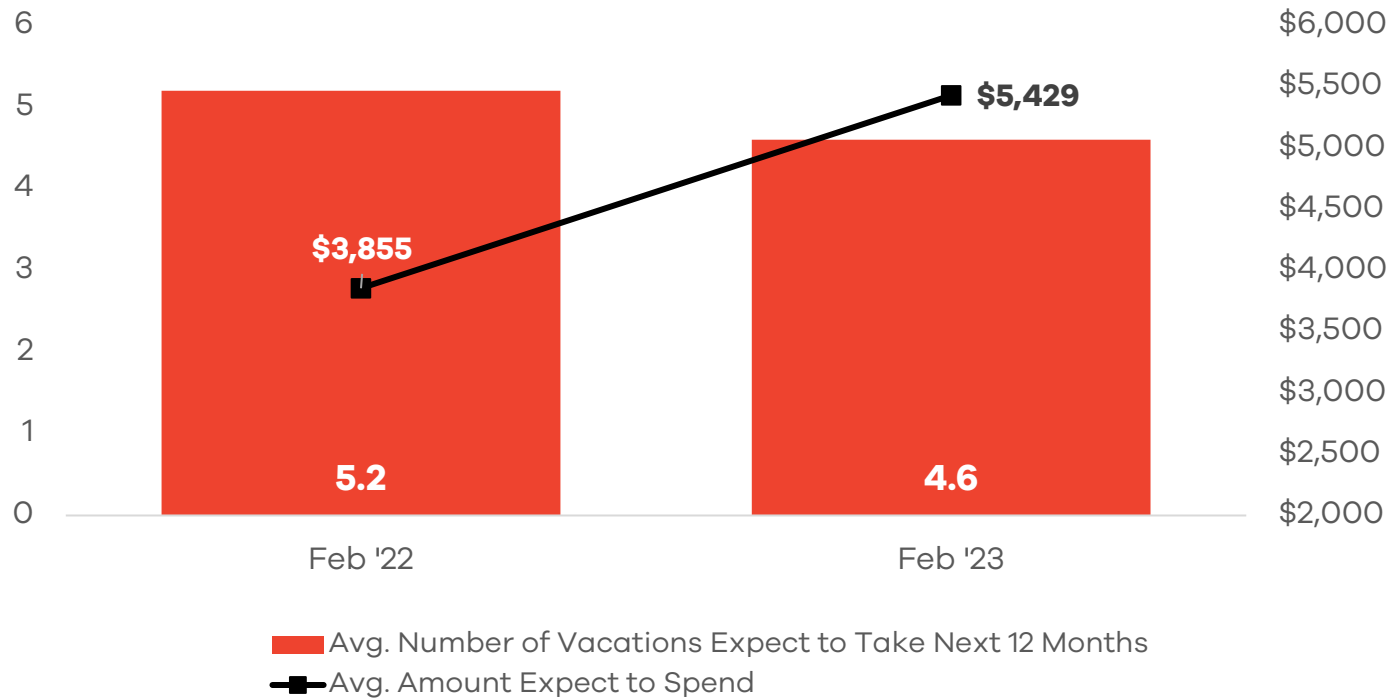
Not only do these travelers have a high level of interest in visiting Hawaii, but they also have the means to do so.



Travel Outlook Snapshot

Spending Intentions Are Up From February '22, While Trip Intentions Are Down.

Leisure Travel and Spending/Next 12 Months



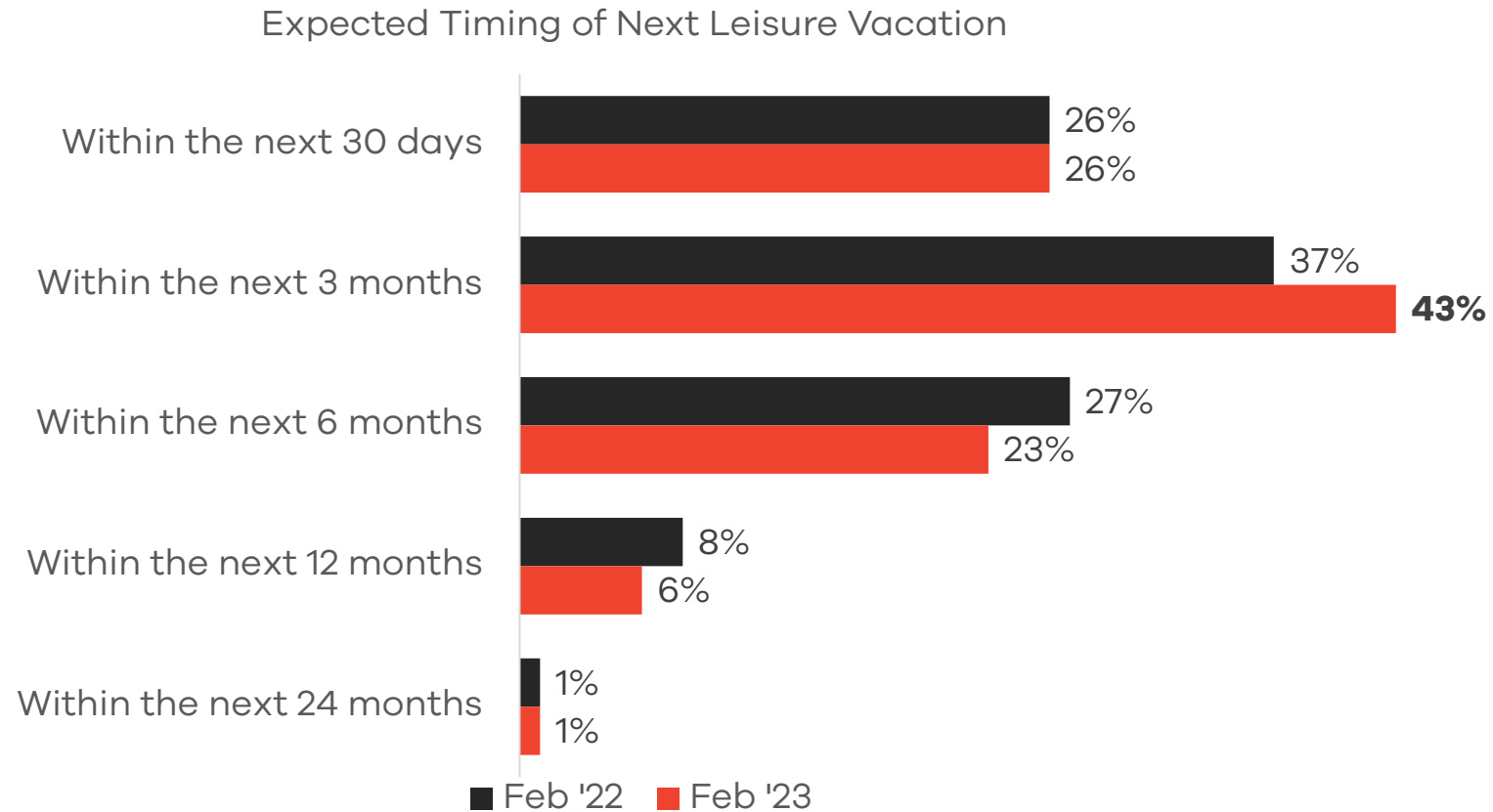
Even though number of vacations is slightly down from this time last year, spending intentions are up by more than \$1,500. Travelers may be influenced by rising inflation, planning to take fewer trips but spending more on the trips they do take.

Traveler Intentions: Over Time

Base: Likely to Visit Hawaii & Planning to Take a Trip in the Next 12 Months (n=736)

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Spring Edition"

Travel Intentions Within The Next 3 Months Are Up From February '22.



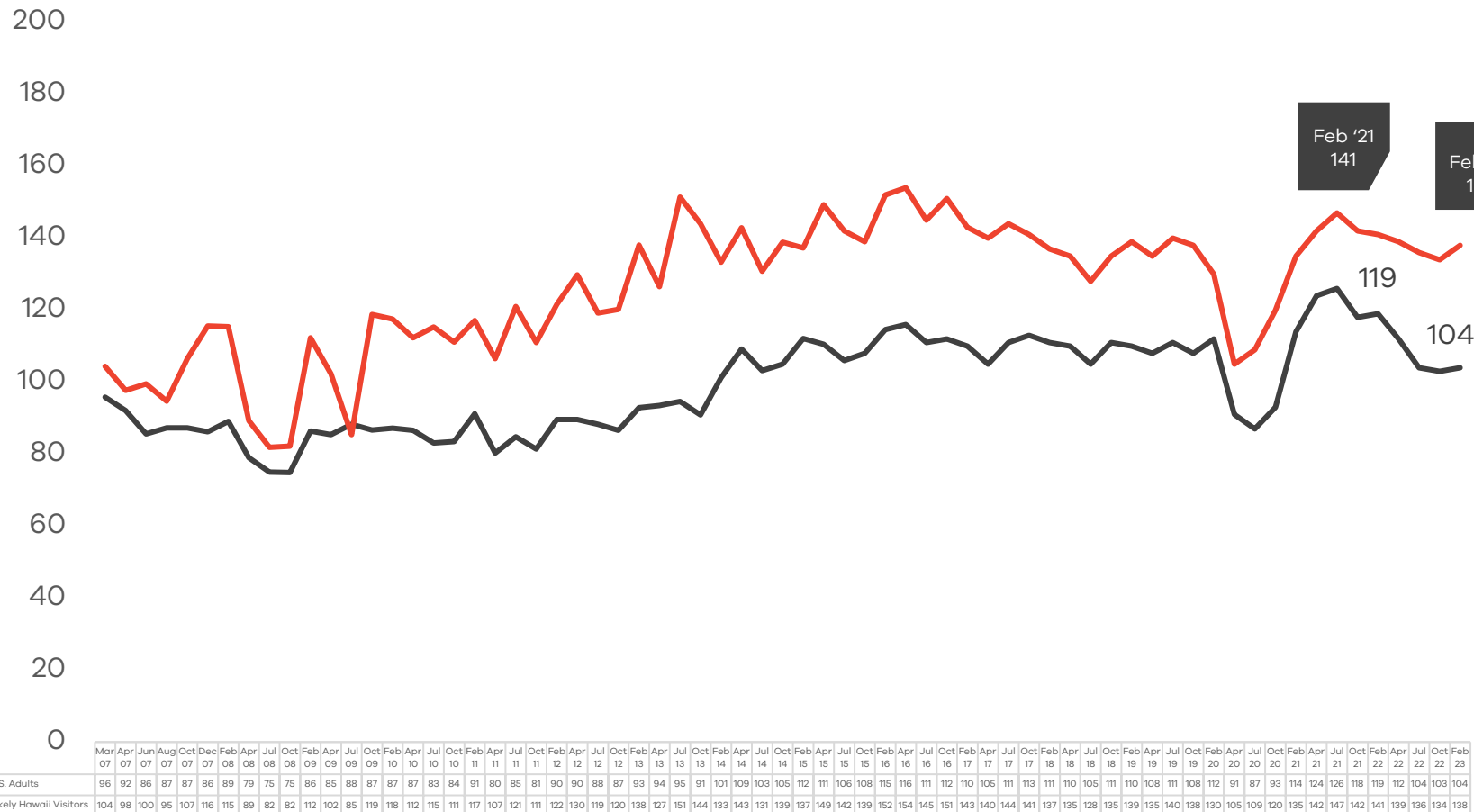
Traveler Intentions: Over Time

Data in bold indicates a significant difference from February 2022.

Base: Likely to Visit Hawaii (n=745)

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Spring Edition"

Overall Traveler Sentiment Score: Down Slightly From Last Year– Up From Last Quarter

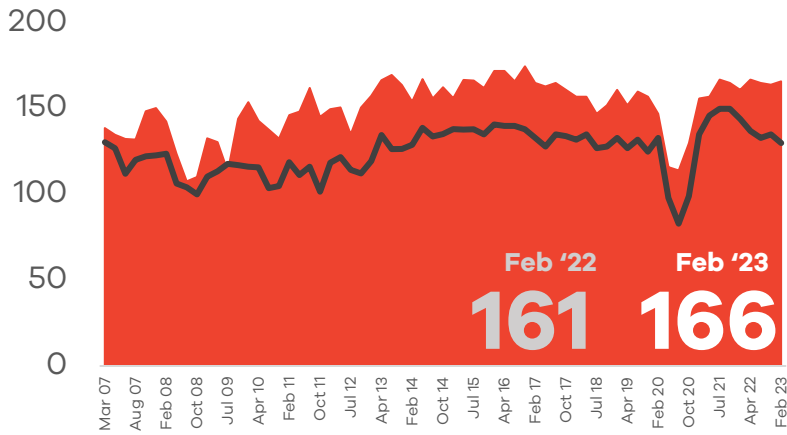


The Traveler Sentiment Score consists of six variables, including: interest in travel, time available for travel, personal finances available for travel, affordability of travel, quality of service and safety of travel. It provides a glimpse into how U.S. adults are feeling about travel this year compared to the same time a year ago. MMGY has calculated and reported the TSI quarterly since March 2007; therefore, we are able to compare the indices to February 2020 (pre-pandemic levels) to track how the traveler mindset has changed throughout the COVID-19 pandemic.

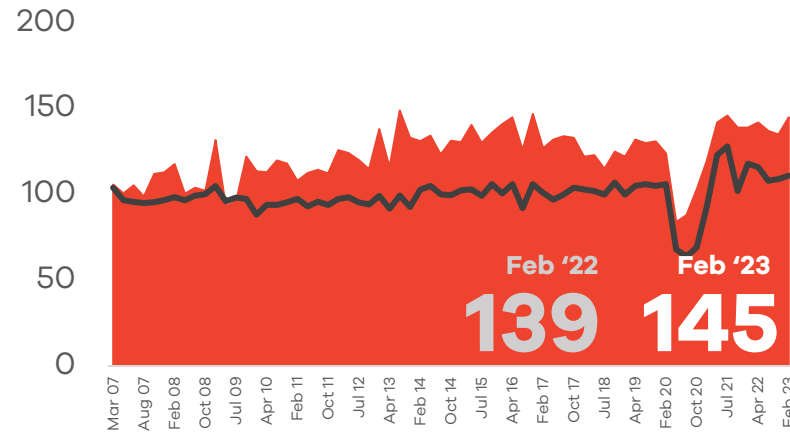
Traveler Sentiment Index™

Affordability of Travel Displayed The Largest Decrease From 2022

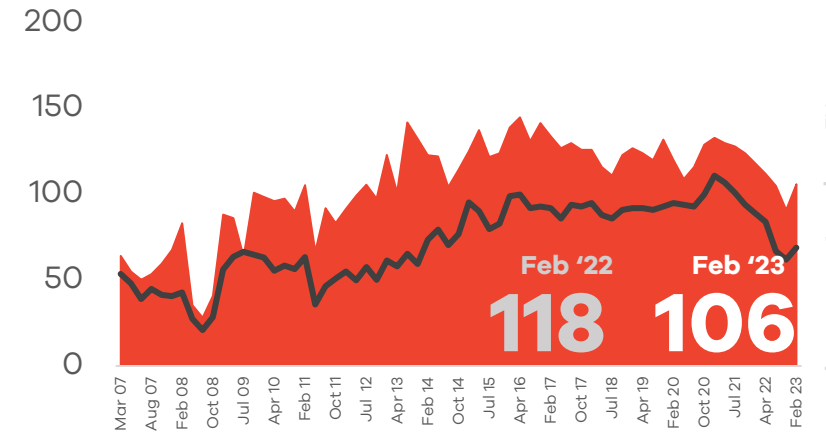
Interest in Travel



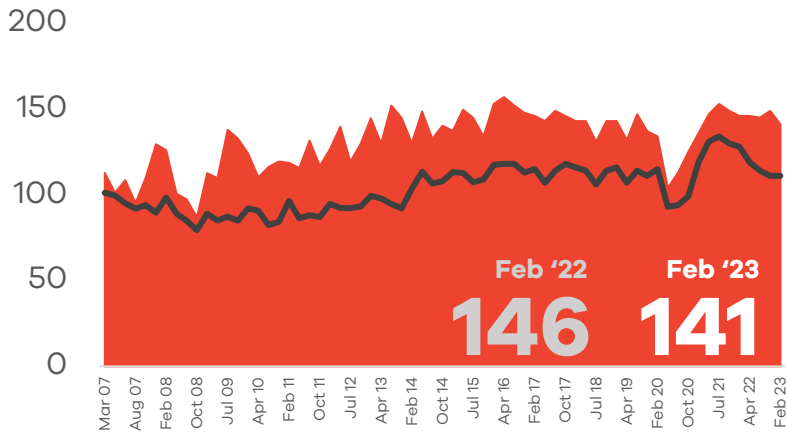
Perceived Safety of Travel



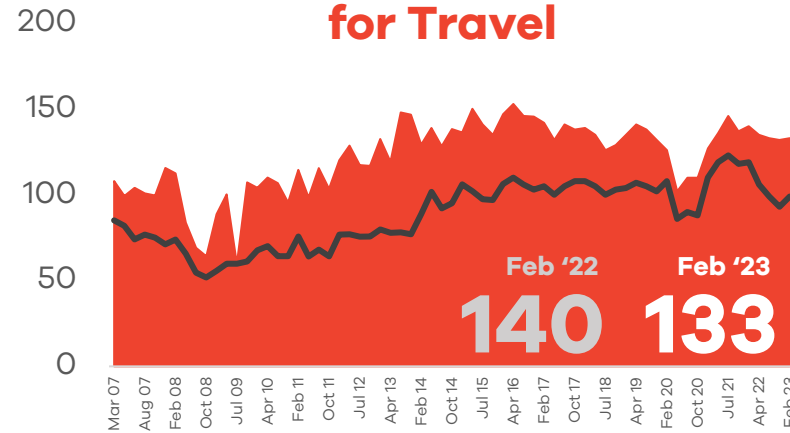
Affordability of Travel



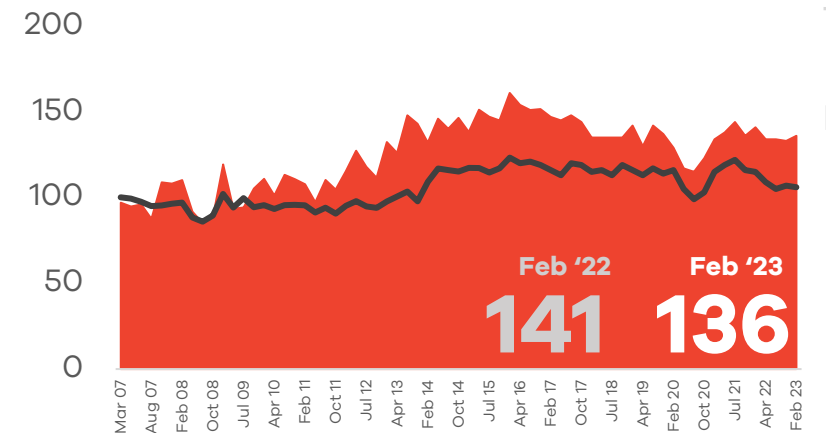
Time Available for Travel



Personal Finances Available for Travel



Quality of Service of Travel



Traveler Sentiment Index™

Base: U.S. Adults (n=4,530) (Black line) & Likely to Visit Hawaii w/o Air Travel (n=1,289) (Red fill)

Source: MMGY Global's travelhorizons™/2023 Portrait of American Travelers® "Spring Edition"



TRAVEL OUTLOOK SNAPSHOT SUMMARY

KEY TAKEAWAY:

- Spending intentions of Likely Hawaii Visitors are up significantly from last year, though travel intentions are down slightly. They plan to take an average of 4.6 trips this year and spend an average of \$5,429 during that time.
- The overall Traveler Sentiment Score of these travelers stands at 138, down 3 points from this time last year but up from last wave. Affordability decreased by 12 points compared to last year, followed by a decrease of 7 points for personal finances available to travel. Interest (up by 5 points) and perceived safety (up by 6 points) increased compared to last year.

WHAT IT MEANS:

Likely Hawaii Visitors are planning to travel this year, and even with some concerns for personal finances and affordability are planning to spend even more so than last year. Affordability continues to be top of mind for these travelers and could be cause for concern given rising costs of travel. We will continue to monitor this closely in future waves.



Where People Want to Visit

California, Florida, New York, Alaska and Nevada Are The Other Top States of Interest Among Likely Hawaii Visitors

Top 20 States of Interest	Feb '22	Feb '23
California	74%	72%
Florida	70%	68%
New York	64%	64%
Alaska	65%	63%
Nevada	60%	63%
Colorado	66%	61%
Texas	61%	60%
Washington	61%	60%
Arizona	65%	58%
Georgia	55%	56%
South Carolina	52%	51%
North Carolina	53%	50%
Maine	47%	49%
Montana	49%	48%
Utah	54%	47%
Louisiana	52%	47%
Tennessee	51%	47%
New Mexico	53%	46%
Pennsylvania	46%	46%
Massachusetts	48%	46%

Destinations of Interest

Base: Likely to Visit Hawaii (n=745)

Data in bold indicates a significant difference from February 2022.

Source: MMGY Global's 2023 Portrait of American Travelers® "Spring Edition"

Other Than Hawaii Destinations, Likely Hawaii Visitors Are Also Interested in Visiting Las Vegas and San Diego

Top 20 Destinations of Interest	Feb '22	Feb '23
Island of Hawai'i	73%	83%
Honolulu, HI	75%	79%
Kaua'i, HI	69%	77%
Maui, HI	72%	72%
Las Vegas, NV	70%	68%
Lanai, HI	NA	68%
San Diego, CA	65%	65%
Florida Keys/Key West, FL	65%	65%
Orlando, FL	64%	63%
New York City, NY	66%	62%
Miami, FL	65%	62%
Los Angeles, CA	64%	62%
Washington, DC	60%	60%
Napa Valley, CA	59%	58%
San Francisco, CA	63%	58%
New Orleans, LA	61%	57%
Phoenix/Scottsdale, AZ	61%	57%
Seattle, WA	61%	57%
Boston, MA	54%	57%
Tampa, FL	61%	56%

Destinations of Interest

Base: Likely to Visit Hawaii (n=745)

Data in bold indicates a significant difference from February 2022.

Source: MMGY Global's 2023 Portrait of American Travelers® "Spring Edition"

Likely Hawaii Visitors are Also Interested in Visiting Europe, The Caribbean and Canada

International Destinations of Interest	Feb '22	Feb '23
Europe	38%	54%
The Caribbean	30%	45%
Canada	34%	41%
Mexico	27%	32%
Central America	20%	23%
Oceania	12%	21%
South America	22%	19%
Asia	16%	19%
Middle East	8%	9%
Africa	8%	8%

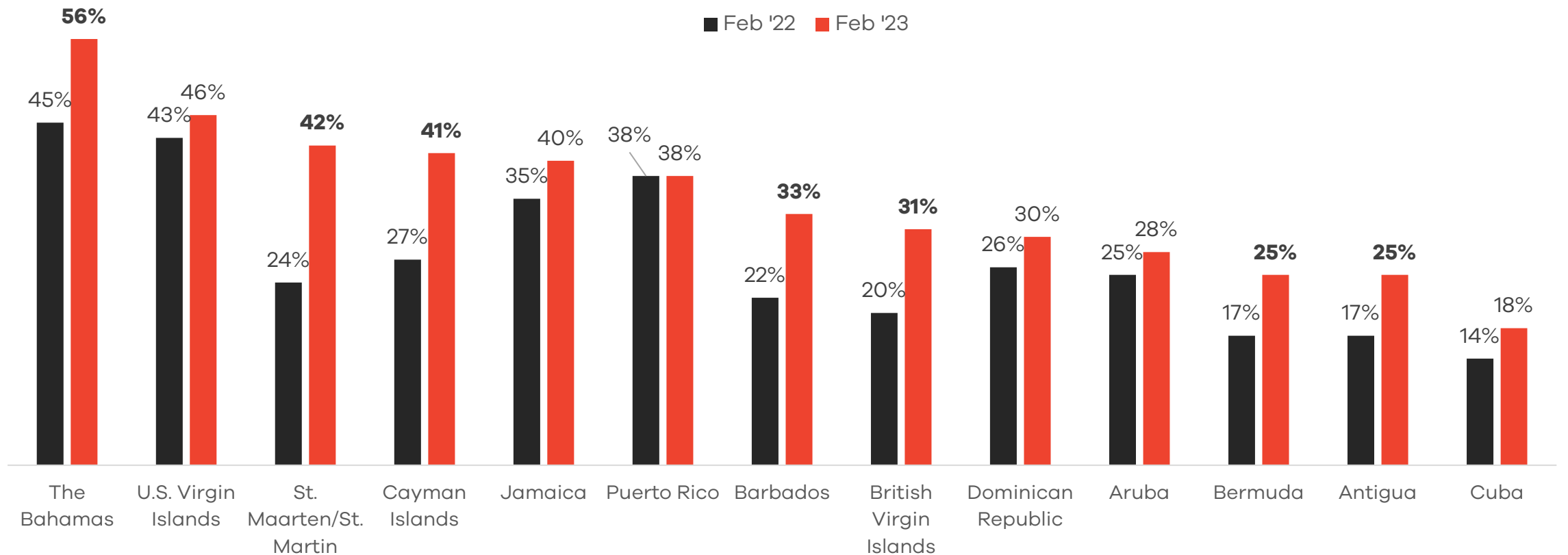
Data in bold indicates a significant difference from February 2022.

Destinations of Interest

Interest In Visiting Many Caribbean Destinations Rose Since This Time Last Year

Caribbean Destinations of Interest

■ Feb '22 ■ Feb '23



Destinations of Interest

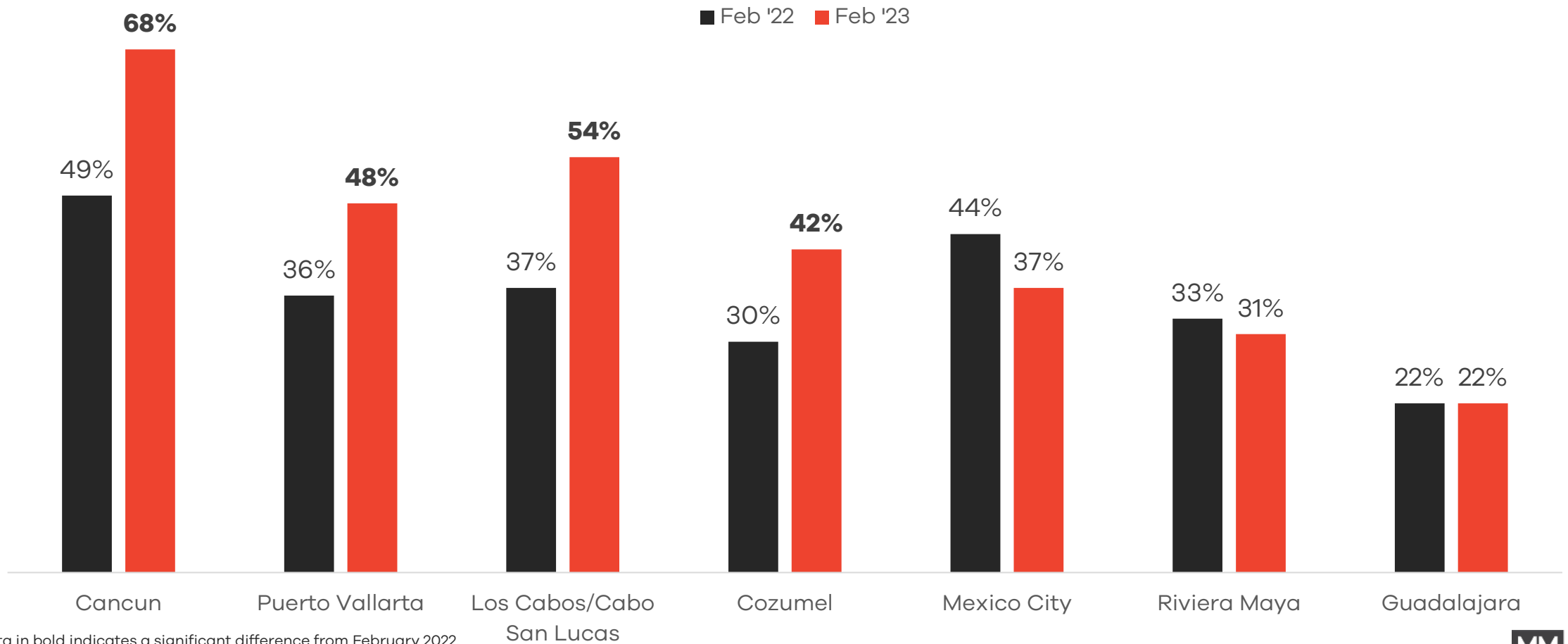
Data in bold indicates a significant difference from February 2022.

Base: Likely to Visit Hawaii & Interested in Visiting The Caribbean (n=332)

Source: MMGY Global's 2023 Portrait of American Travelers® "Spring Edition"

The Top Mexican Destinations of Interest Are Cancun and Puerto Vallarta

Mexican Destinations of Interest



Destinations of Interest

Data in bold indicates a significant difference from February 2022.

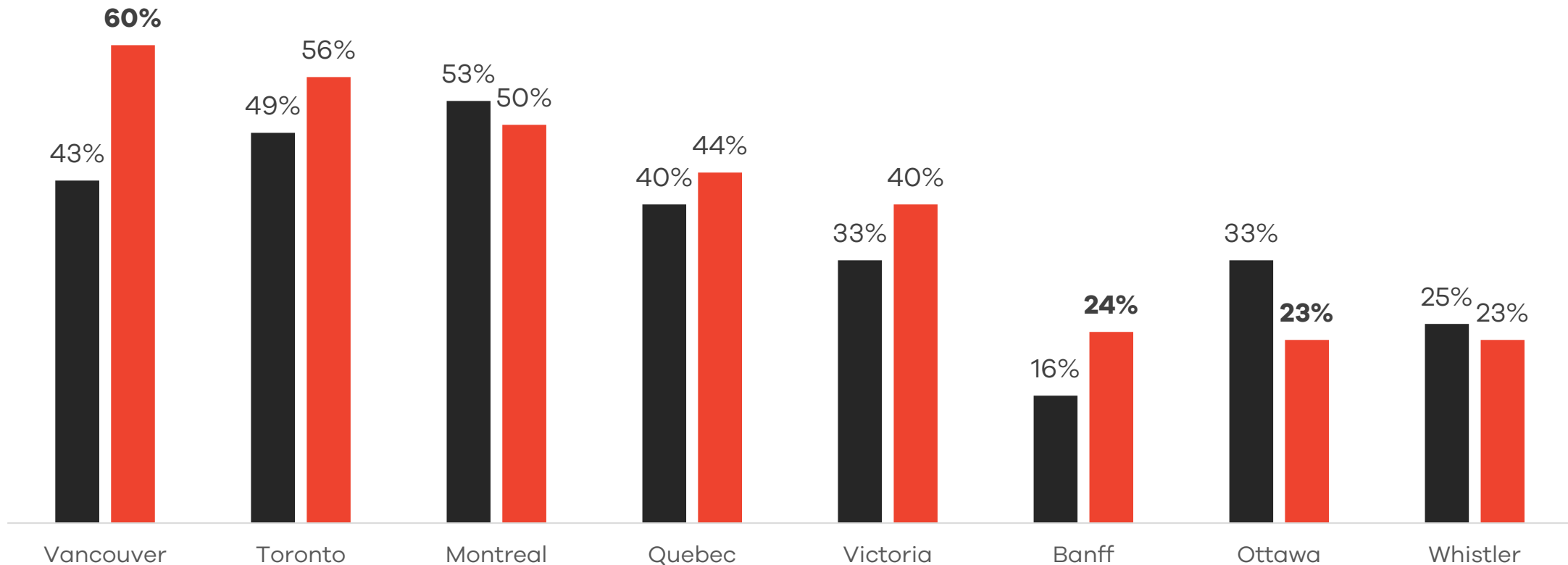
Base: Likely to Visit Hawaii & Interested in Visiting Mexico (n=238)

Source: MMGY Global's 2023 Portrait of American Travelers® "Spring Edition"

Interest In Visiting Vancouver And Banff Is Up Significantly From Last Year

Canadian Destinations of Interest

■ Feb '22 ■ Feb '23



Destinations of Interest

Data in bold indicates a significant difference from February 2022.

Base: Likely to Visit Hawaii & Interested in Visiting Canada (n=307)

Source: MMGY Global's 2023 Portrait of American Travelers® "Spring Edition"



Barriers to Travel

Significantly More of Those Likely to Visit Hawaii Perceive Nearly All Aspects of Travel to Be Safe Than Did So Last Year

% Who Perceive Each Travel Aspect To Be Safe	Feb '22	Feb '23
Going to a beach	79%	87%
Traveling by personal car	85%	86%
Staying in a hotel or resort	81%	86%
Going to a park	79%	86%
Visiting friends and family	77%	86%
Taking an overnight domestic trip	76%	86%
Taking a domestic flight	70%	82%
Staying in a vacation rental	72%	79%
Visitors coming to my city or town from outside the local area	67%	75%
Visiting a theme or amusement park	58%	74%
Attending a sporting event	57%	70%
Participating in snow sports	70%	69%
Taking an overnight international trip	61%	69%
Taking a river cruise	55%	69%
Taking an ocean cruise	56%	67%
Attending a concert/festival	57%	66%
Attending a conference or convention	56%	65%

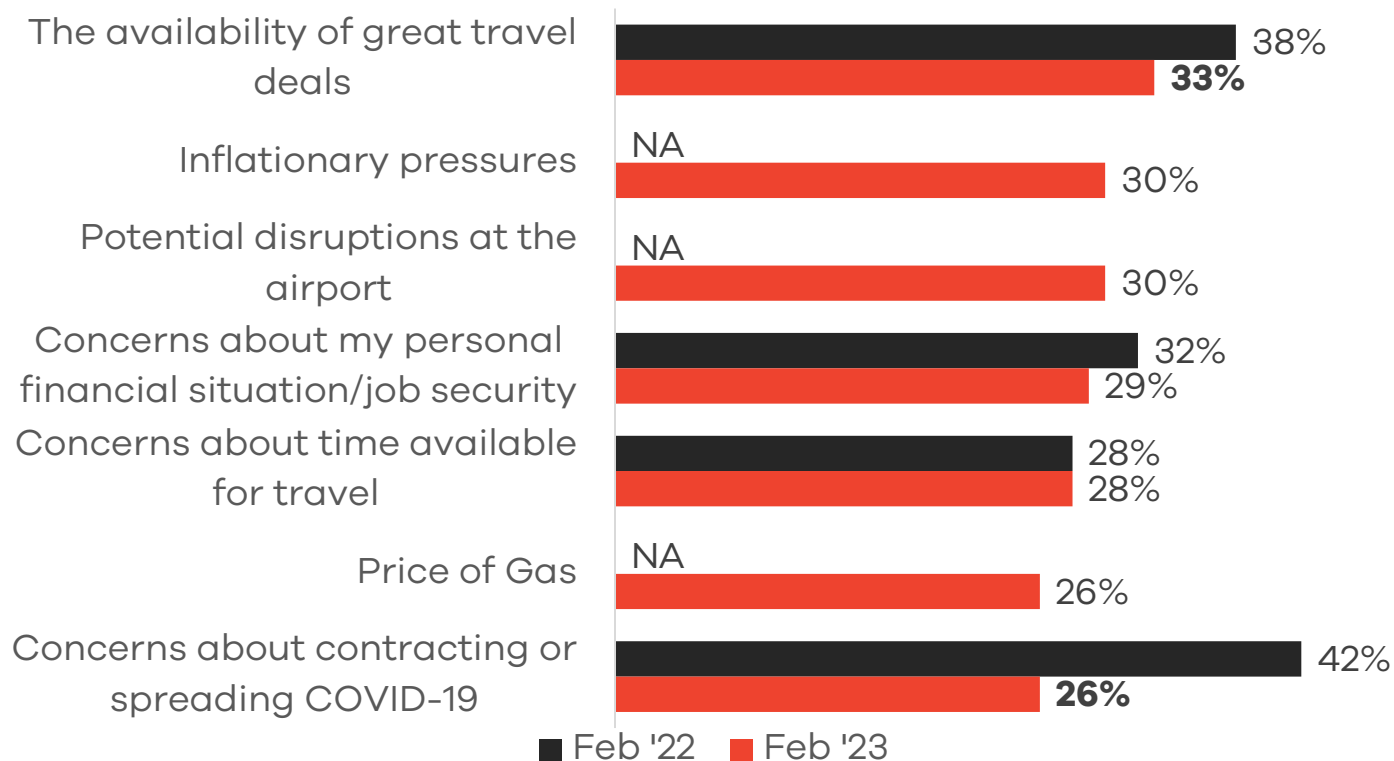
Data in bold indicates a significant difference from February 2022.

Base: Likely to Visit Hawaii (n=745)

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Spring Edition"

Fewer Likely Hawaii Visitors Are Concerned About COVID-19 When Planning Travel.

% Who Are Extremely Impacted By...



/ While concerns around COVID-19 continue to decrease, the availability of great travel deals and inflationary pressures are primary concerns.

Barriers To Travel

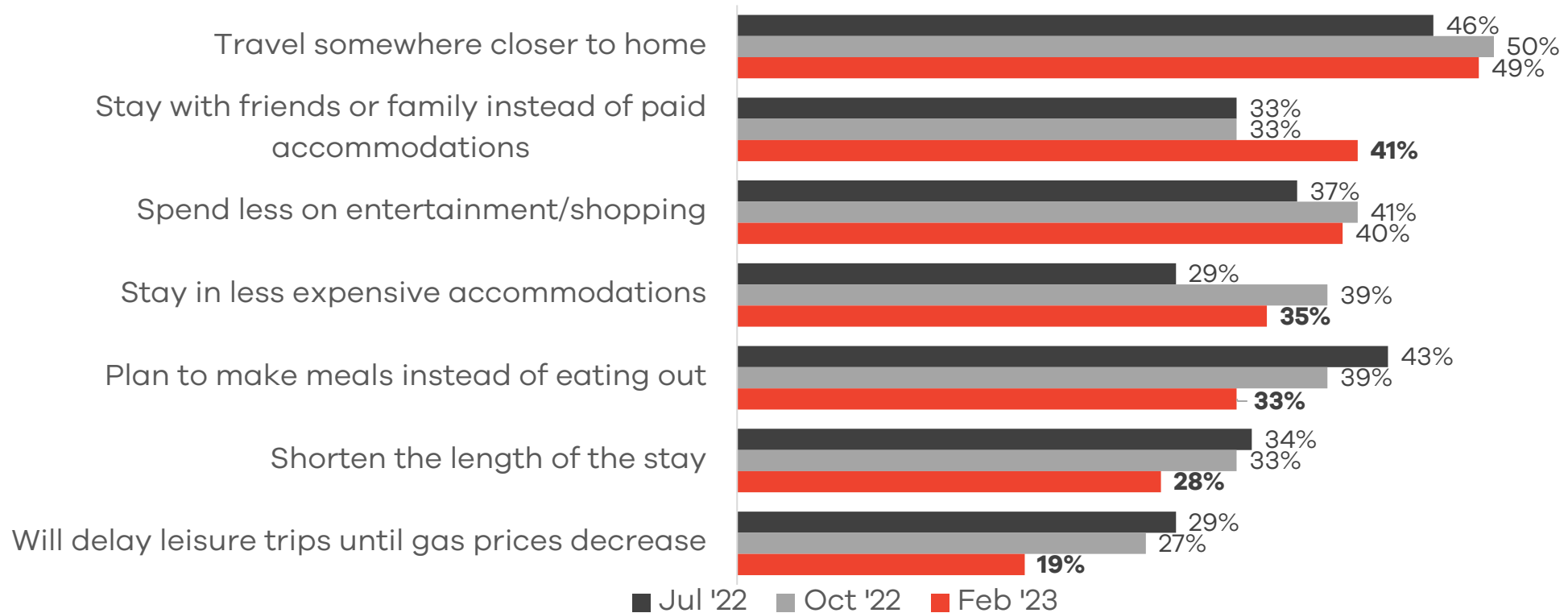
Data in bold indicates a significant difference from February 2022.

Base: Likely to Visit Hawaii (n=745)

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Spring Edition"

Likely Hawaii Visitors Impacted By Gas Prices Say They Will Travel Somewhere Closer To Home, Followed By Staying With Friends And Family And Spending Less On Entertainment/Shopping


How will the price of gas impact your leisure trips during the next six months?



Barriers To Travel

Base: At least somewhat impacted by the price of gas & Likely Hawaii Visitors (n=530)

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Spring Edition"



BARRIERS TO TRAVEL SUMMARY

KEY TAKEAWAY:

- With higher rates of vaccinations, lower case numbers, and fewer extreme illness cases, travel concerns around COVID-19 continue to decrease. Although this is still an extreme concern for a quarter of Likely Hawaii Visitors, this percentage is down from nearly half this time last year, and we expect it to continue to decrease.
- We also see that more Likely Hawaii Visitors perceive many aspects of travel to be safe than did so last year. 9 in 10 consider going to the beach, traveling by personal car, staying in a hotel or resort, going to a park, visiting friends and family and taking an overnight domestic trip to be safe.

WHAT IT MEANS:

While concerns around COVID-19 have not gone away entirely, it has become less of a barrier to travel than it was in recent years. Cost and affordability, meanwhile, appear to be a more primary concern for travelers.



*Spring
Module*

**Sustainability
in Travel**

89%
2022

87%
2023

of likely Hawaii visitors are willing to change travel behavior to reduce impact on the environment.

Base: Likely to Visit Hawaii (n=745)

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Spring Edition"

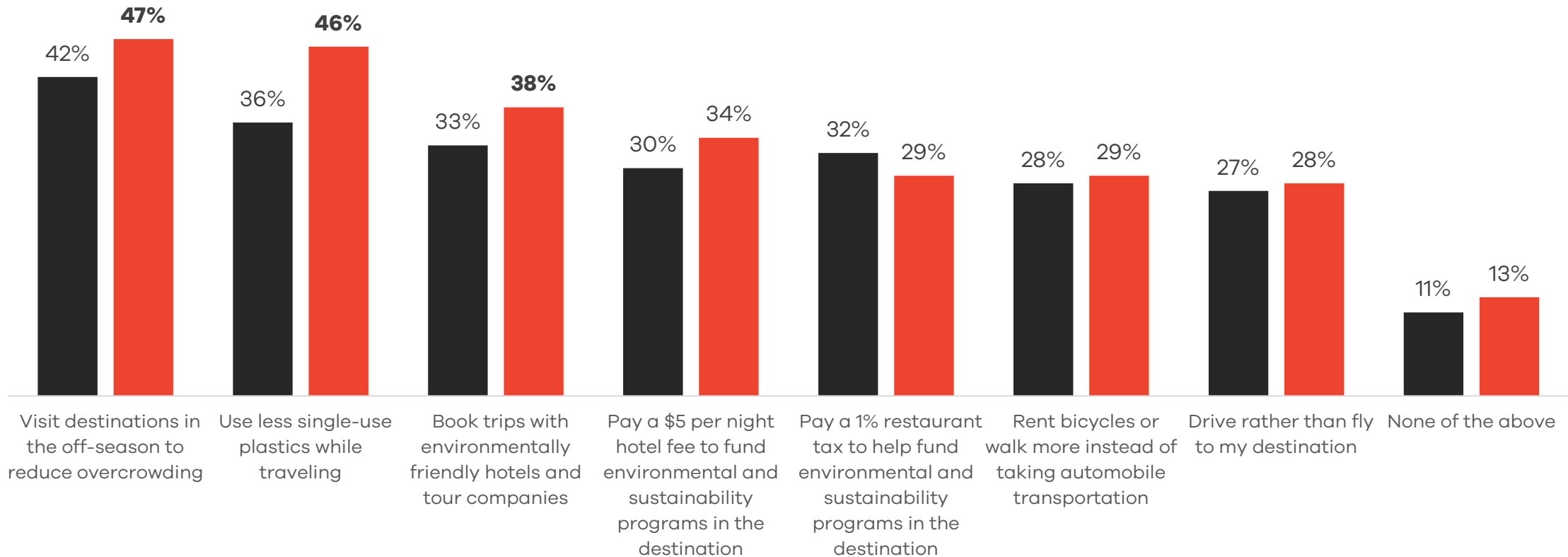


**A Majority of Travelers
Indicate They Are Willing
to Change Travel Behavior
to Reduce Their
Environmental Impact**

Likely Hawaii Visitors Are Most Willing to Travel In The Off-Season, Cut Back on Single-Use Plastics, and Book With Environmentally-Friendly Service Providers

Actions Willing to Take to Reduce Impact on Environment

■ 2022 ■ 2023

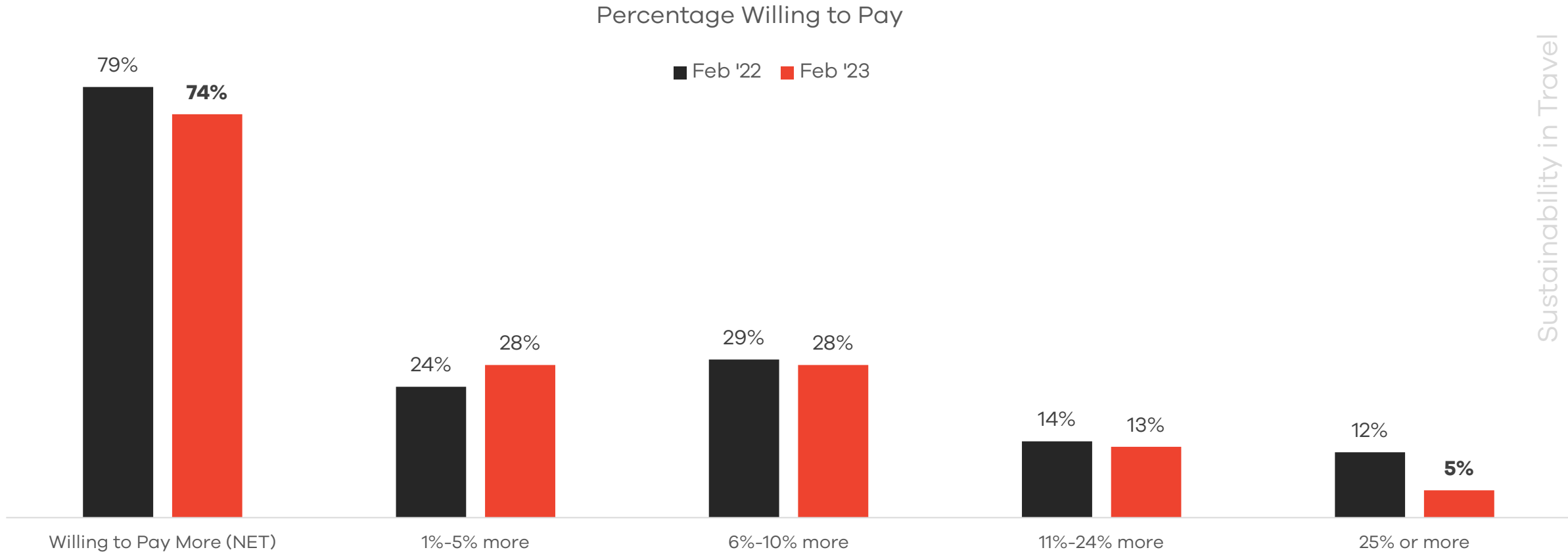


Sustainability in Travel

Base: Likely to Visit Hawaii (n=745)

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Spring Edition"

7 in 10 Likely Hawaii Visitors are Willing to Pay More To Patronize Travel Providers Demonstrating Environmental Responsibility



Data in bold indicates a significant difference from February 2022.

Base: Likely to Visit Hawaii (n=745)

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Spring Edition"

Significantly Fewer Travelers Indicate They Are Impacted By A Provider's Environmental Efforts When Making Travel Decisions

Data in bold indicates a significant difference from February 2022.

Base: Likely to Visit Hawaii (n=745)

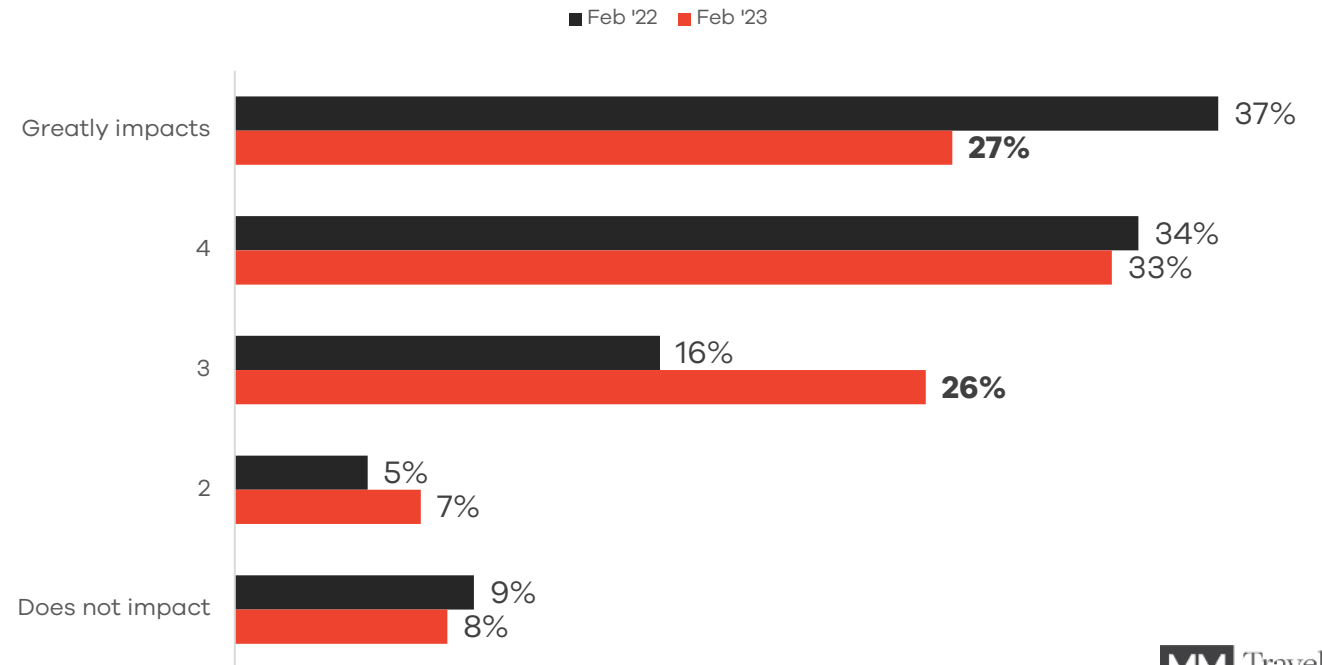
Source: MMGY Global's 2023 *Portrait of American Travelers* "Spring Edition"

37%
2022

27%
2023

of likely Hawaii visitors indicate a travel service provider's focus on sustainability and environmental considerations **greatly** impacts their travel decision-making.

Impact of a Provider's Environmental Efforts When Making Travel Decisions

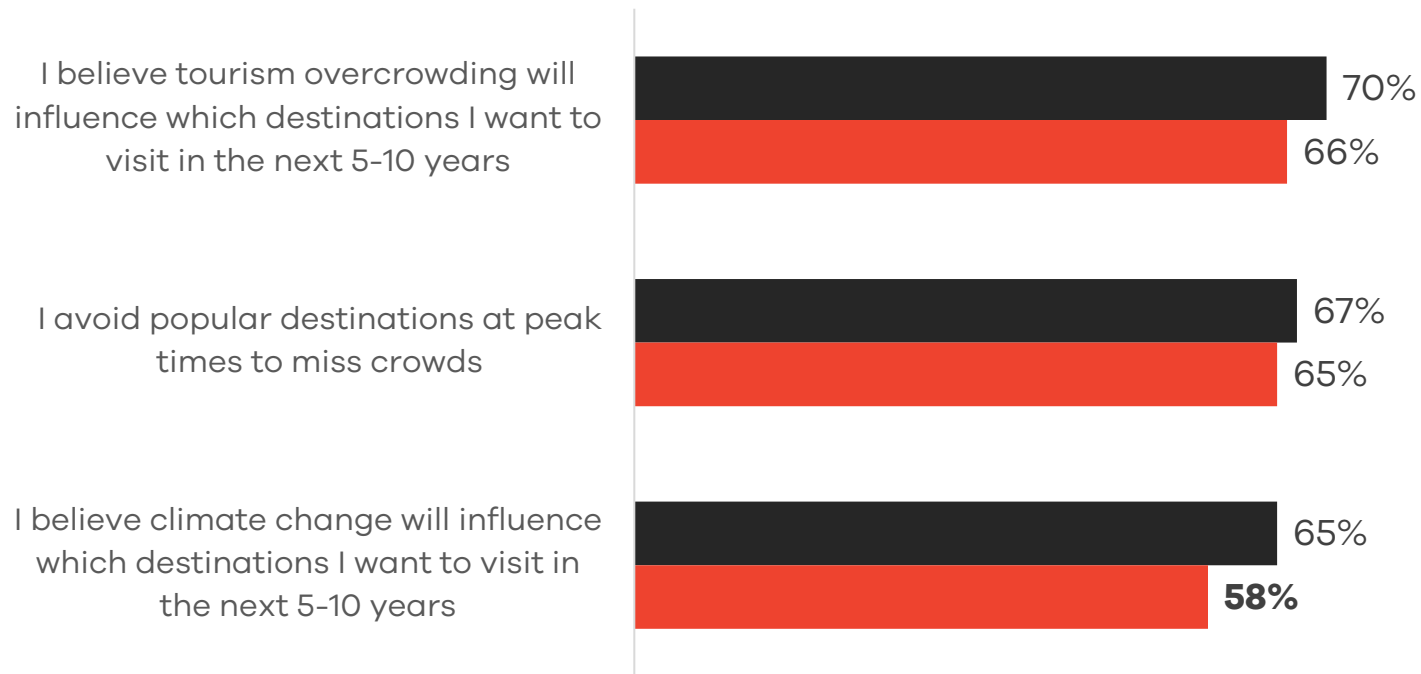


Sustainability in Travel

Likely Hawaii Visitors Are Thinking About Overcrowding When Making Future Travel Plans

% Strongly/Somewhat Agree

■ Feb '22 ■ Feb '23



Base: Likely to Visit Hawaii (n=745)

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Spring Edition"



Half of Likely Hawaii Visitors Want to See How Travel Companies Are Becoming More Sustainable, Significantly Higher Than U.S. Leisure Travelers



of Likely Hawaii Visitors believe it is important for travel companies to provide an inside look at how they are becoming more sustainable.






SUSTAINABILITY IN TRAVEL SUMMARY

KEY TAKEAWAY:

- Traveling sustainably is important to nearly all Likely Hawaii Visitors.
 - 9 in 10 are willing to change their travel behaviors in order to reduce their impact on the environment
 - 7 in 10 are willing to pay more to patronize travel providers that demonstrate environmental responsibility.
 - Likely Hawaii Visitors are willing to visit a destination in the offseason to avoid overcrowding, reduce the use of single use plastics and book trips with environmentally friendly hotels and tour companies.

WHAT IT MEANS:

Sustainability has shown that it is not a fleeting trend and is important to many travelers, especially those likely to visit Hawaii. Continuing to educate and show visitors that this is an important initiative to Hawaii Tourism will both have a positive impact on tourism but also on the destination and its residents.



Spring Module

Sources of Travel Information

Reviews of Fellow Travelers Continue To Be Trustworthy Sources of Information To Likely Hawaii Visitors When Planning Travel

Data in bold indicates a significant difference from February 2022.

Base: Likely to Visit Hawaii (n=745)

Source: MMGY Global's 2023 *Portrait of American Travelers* "Spring Edition"

% Strongly/Somewhat Agree

■ Feb '22 ■ Feb '23

I trust reviews/ratings of fellow travelers on review sites over those of traditional ratings organizations (AAA, Michelin, etc.)



I trust online reviews over the opinions of my friends and family



Sources of Travel Information

The Top Websites Used For Travel Information Among Likely Hawaii Visitors Are Google, Tripadvisor and Expedia

Websites Used Regularly for Travel Information	Feb '22	Feb '23
Google	41%	42%
Tripadvisor	25%	39%
Expedia	29%	34%
Hotels.com	26%	33%
YouTube	31%	29%
Specific hotel brand website	23%	28%
Booking.com	23%	27%
Specific airline brand website	25%	26%
Trivago	21%	23%
AAA Travel	21%	19%
Specific cruise brand website	16%	19%
Priceline	16%	18%
Travelocity	19%	17%
Kayak	15%	17%
Specific vacation destination website	14%	17%
Orbitz	15%	13%
Yelp	13%	13%
Travel blogs	13%	11%

Data in bold indicates a significant difference from February 2022.

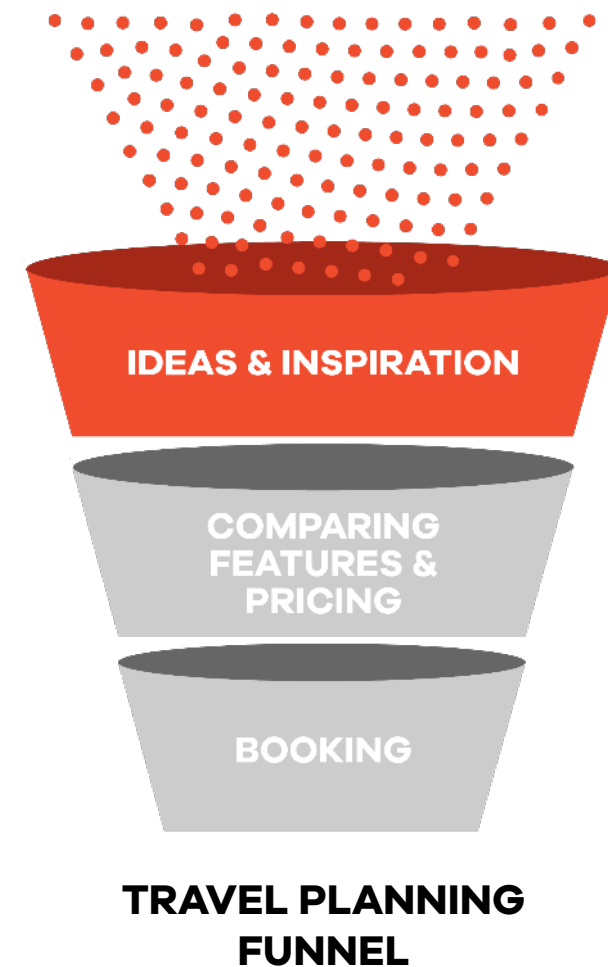
Base: Likely to Visit Hawaii (n=745)

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Spring Edition"

Likely Hawaii Visitors Turn To Friends/Family and Travel Review Sites When Looking For Travel Ideas and Inspiration

Sources Consider for Ideas & Inspiration	Feb '22	Feb '23
Friends and family	39%	49%
Travel review websites	32%	38%
Online visitor guides	25%	33%
Travel service provider websites (Hilton, Delta, etc.)	26%	32%
Television shows	21%	30%
Destination websites (Visit Orlando, Destination DC, etc.)	26%	29%
Streaming TV services (Netflix, Hulu, etc.)	26%	29%
Television advertising	21%	26%
Online travel agencies (Expedia, Orbitz, etc.)	25%	25%
Video sharing websites (YouTube, etc.)	23%	24%
Magazine/newspaper articles	19%	23%
Social media posts from destinations or travel service providers	22%	22%
Printed visitor guides	15%	22%
Online/social media advertising	22%	21%
Social media influencers	17%	18%
Email from the travel service provider	20%	17%
Email from the destination	17%	16%
Digital newspaper/magazine	13%	16%
Magazine/newspaper advertisements	20%	15%
Streaming audio (Pandora, Spotify, etc.)	16%	11%
Content from publishers (Buzzfeed, New York Times, etc.)	15%	15%
Traditional travel agents	13%	15%
Direct mail	12%	14%
Radio shows/advertising	12%	12%
Billboards	12%	12%
Podcasts	13%	10%

Data in bold indicates a significant difference from February 2022.



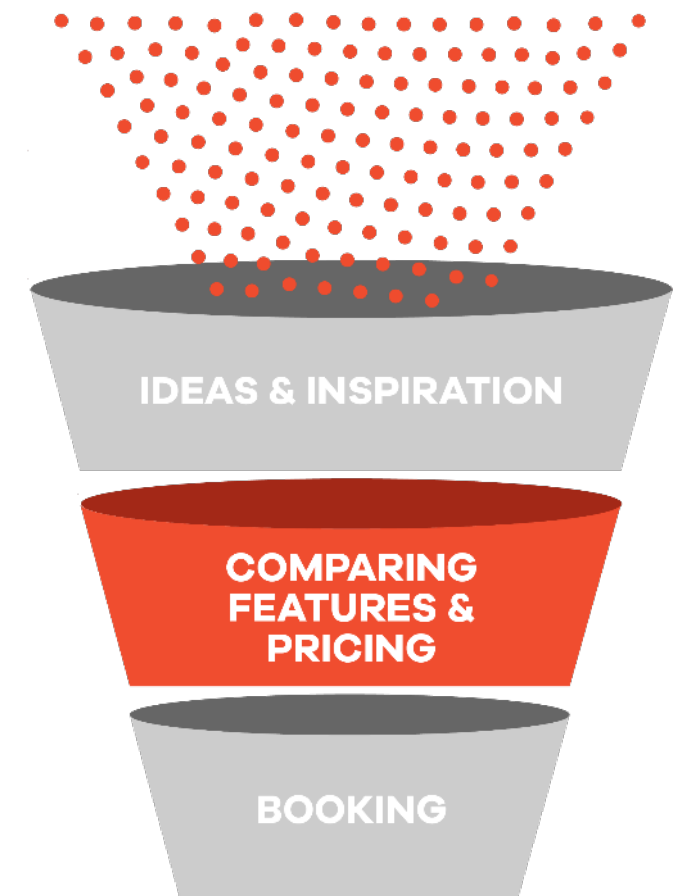
Sources of Travel Information

Base: Likely to Visit Hawaii (n=745)

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Spring Edition"

Travel Review Websites and Friends And Family Are Top Sources for Comparing Features and Pricing For Likely Hawaii Visitors

Sources Consider for Comparing Features and Pricing	Feb '22	Feb '23
Travel review websites	27%	38%
Friends and family	31%	34%
Online travel agencies (Expedia, Orbitz, etc.)	24%	33%
Travel service provider websites (Hilton, Delta, etc.)	26%	28%
Destination websites (Visit Orlando, Destination DC, etc.)	21%	27%
Streaming TV services (Netflix, Hulu, etc.)	17%	24%
Online visitor guides	22%	22%
Video sharing websites (YouTube, etc.)	19%	20%
Email from the destination	18%	20%
Television advertising	16%	17%
Television shows	16%	17%
Online/Social media advertising	15%	17%
Printed visitor guides	20%	16%
Social media influencers	16%	16%
Email from the travel service provider	14%	15%
Traditional travel agents	14%	15%
Social media posts from destinations or travel service providers	16%	14%
Direct mail	13%	14%
Content from publishers (Buzzfeed, New York Times, etc.)	15%	13%
Magazine/Newspaper advertisements	15%	12%
Magazine/Newspaper articles	17%	11%
Streaming audio (Pandora, Spotify, etc.)	10%	11%
Digital newspaper/magazine	10%	10%
Billboards	10%	9%
Radio shows/advertising	8%	9%
Podcasts	10%	8%



Sources of Travel Information

TRAVEL PLANNING FUNNEL

Data in bold indicates a significant difference from February 2022.

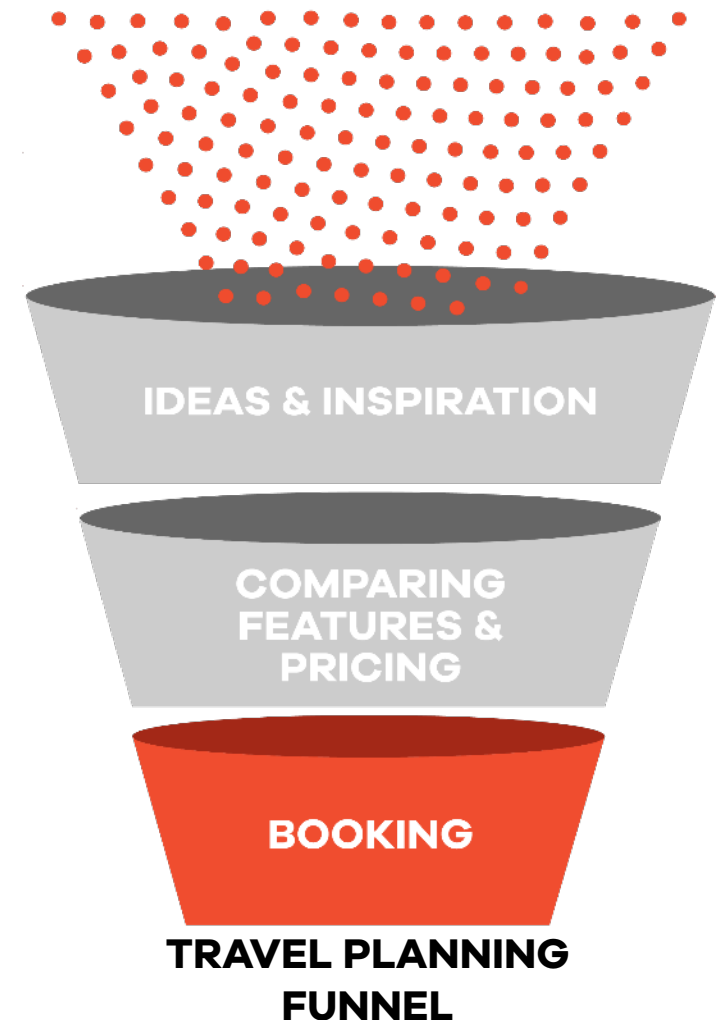
Base: Likely to Visit Hawaii (n=745)

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Spring Edition"

Travel Service Provider Websites Are Now The Top Source Used For Reservations Among Likely Hawaii Visitors, Closely Followed By OTAs

Sources Used When Making Reservations	Feb '22	Feb '23
Travel service provider websites (Hilton, Delta, etc.)	43%	48%
Online travel agencies (Expedia, Orbitz, etc.)	39%	46%
Google Travel (Google flights/hotels)	33%	34%
Calling travel service provider directly	33%	29%
Destination websites (Visit Orlando, Destination DC, etc.)	26%	28%
Travel review websites	27%	27%
Travel service provider app	25%	25%
Traditional travel agents	26%	24%

Data in bold indicates a significant difference from February 2022.

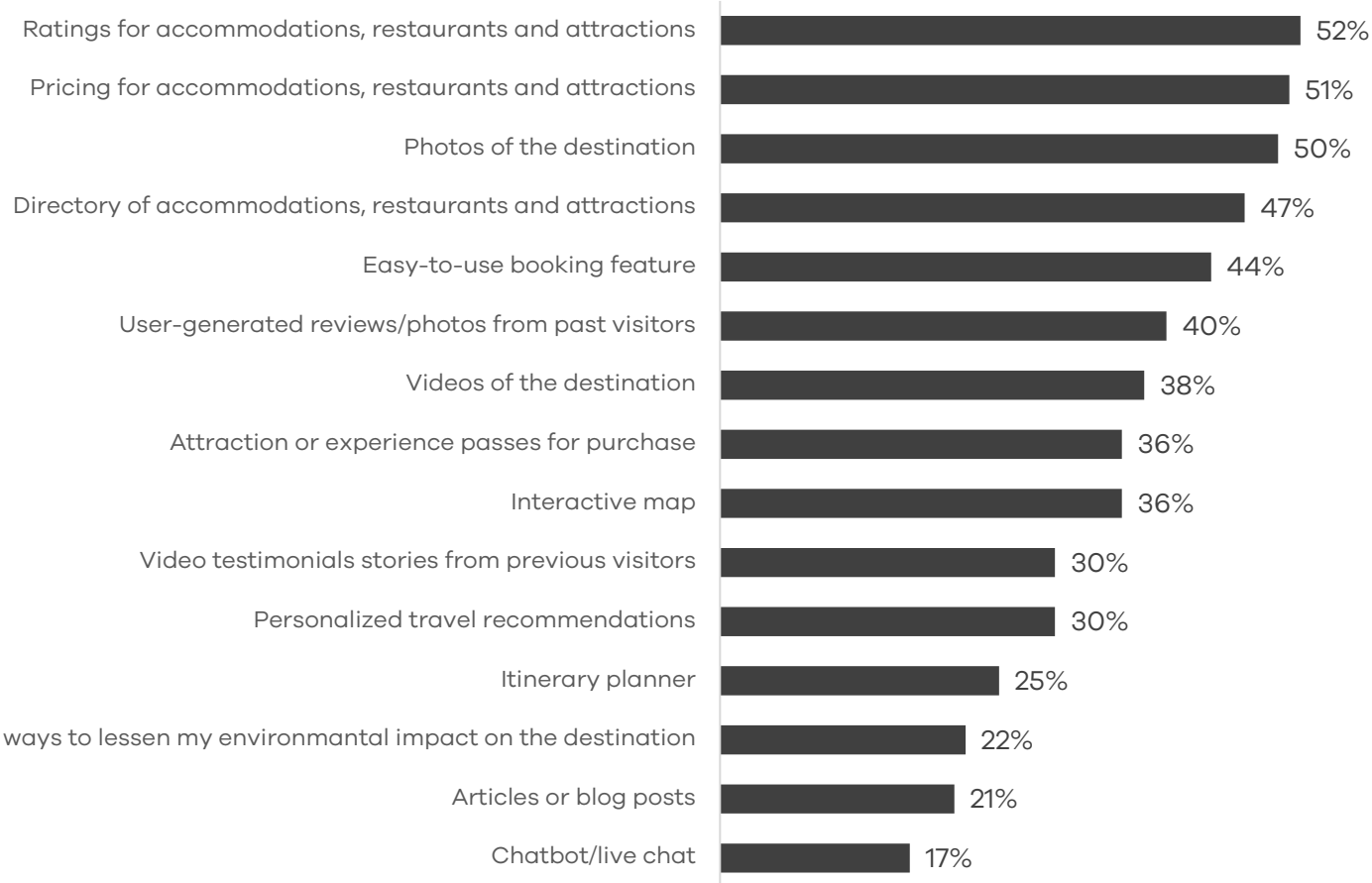


Likely Hawaii Visitors Most Value Accommodation, Restaurant And Attraction Information on a Destination Website

63%
Likely Hawaii Visitors

trust destination websites to provide the most reliable, up-to-date travel information about their destination

Valuable Destination Website Features
Among Those Who Regularly Visit Destination Websites



Sources of Travel Information

Base: Likely to Visit Hawaii (n=745) & Likely to Visit Hawaii who regularly visit destination websites for travel information (n=123)

Source: MMGY Global's 2023 *Portrait of American Travelers*®



SOURCES OF TRAVEL INFORMATION SUMMARY

KEY TAKEAWAY:

- After the use of online travel agencies displayed decreases in all stages of the travel planning process last year, travel service provider websites have surpassed them in usage by Likely Hawaii Visitors becoming the top source for making reservations. However, usage of OTAs seems to be recovering, particularly at the comparing prices and booking stages.
- Online travel reviews continue to be important and trustworthy sources of information for Likely Hawaii Visitors. 7 in 10 agree that they trust online reviews by fellow travelers more than traditional rating organizations or even their own friends and family. Travel Review Websites are also frequently used during the ideas & inspiration stage and when comparing features and pricing.



SOURCES OF TRAVEL INFORMATION SUMMARY

KEY TAKEAWAY:

- While they may not be the most used source throughout the travel planning process, destination websites are considered to provide the most up-to-date and reliable information about a destination by more than 6 in 10 Likely Hawaii Visitors. The features considered most valuable on destination websites are ratings, pricing, and a directory of accommodations, restaurants, and attractions, as well as photos of the destination.

WHAT IT MEANS:

Destination websites continue to be essential in a destination's online presence and are important to travelers as they are considered to offer the most reliable information about a destination.

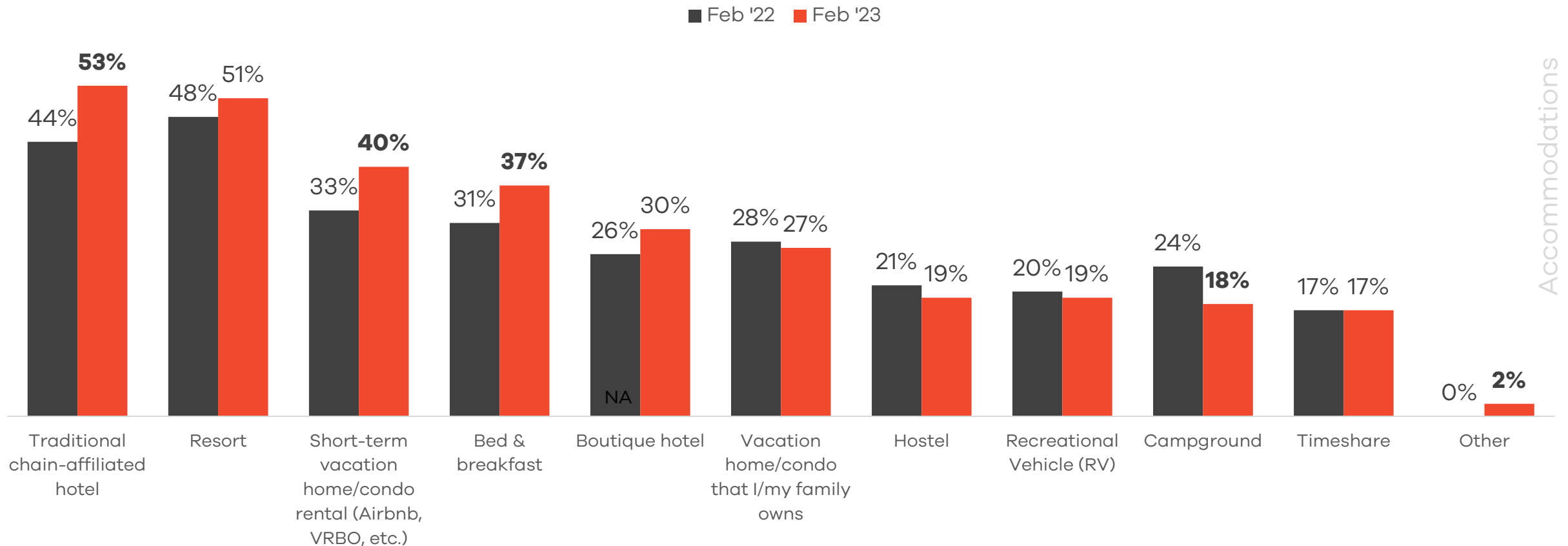
An aerial photograph of a coastal city, likely Honolulu, Hawaii. The foreground shows a wide, sandy beach with some people and umbrellas. The middle ground is filled with a dense urban landscape, including a prominent pinkish-orange building with a central tower and several modern high-rise buildings. In the background, there are lush green mountains under a blue sky with some clouds. The image is split diagonally from the top-left to the bottom-right.

Spring Module

Accommodations

Likely Hawaii Visitors Are Most Interested in Staying at Traditional Chain-Affiliated Hotels or Resorts

Accommodations Interested in Using During Next 12 Months



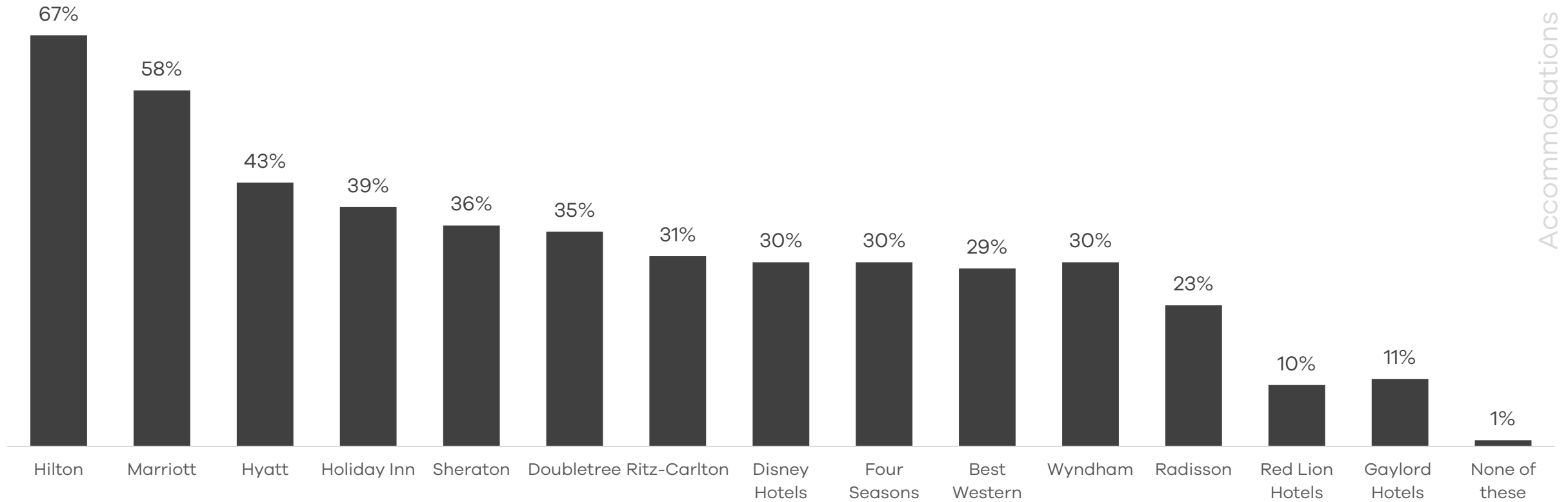
Data in bold indicates a significant difference from February 2022.

Base: Likely to Visit Hawaii (n=745)

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Spring Edition"

Hilton And Marriott Garner The Most Interest From Likely Hawaii Visitors

Hotel Brands Would Consider For Future Vacations

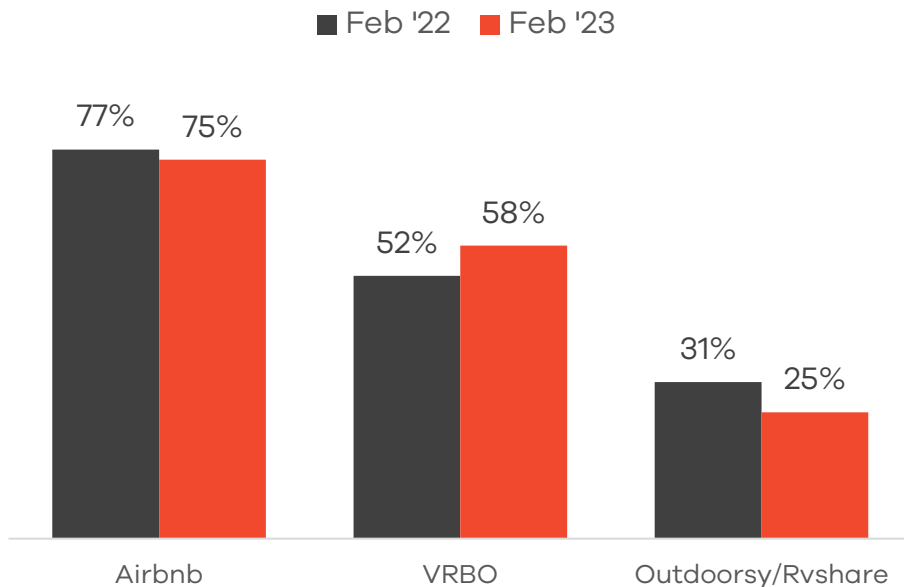


Base: Likely to Visit Hawaii (n=745)

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Spring Edition"

Although Airbnb Continues To Dominate The Short-Term Rental Market, VRBO Continues To Rise Among Likely Hawaii Visitors

Short-Term Vacation Rental Companies Likely to Use During Next 12 Months (Among travelers interested in short-term rentals)



Reasons For Using a Short-Term Rental Instead of a Traditional Hotel (Among those interested in short-term rentals)

I like the idea of vacationing in a home away from home	44%
I want to stay in a unique or unusual place	43%
Short-term rentals are less expensive than hotels	43%
Short-term rentals are better for accommodating a large group	40%
Short-term rentals are typically more interesting in design than traditional hotels or resorts	36%
I want to stay near the people I am visiting	31%
Short-term rentals allow me to vacation with locals in their neighborhood	31%
Due to the COVID-19 pandemic, I feel that short-term rentals are safer than hotels	23%
Other	2%

Accommodations

Data in bold indicates a significant difference from February 2022.

Base: Likely Hawaii visitors interested in short-term rentals (n=295)

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Spring Edition"

Location and Cleanliness Are The Most Important Factors When Choosing Accommodations For Those Likely To Visit Hawaii

Important Factors When Choosing Accommodations	% Find Important
Location	53%
Cleanliness standards/promise	50%
Value for the price	49%
Room rate	49%
Free breakfast	46%
Previous experience/reputation of the accommodation brand	44%
Food/restaurant options available at accommodation	37%
Loyalty/frequent stay program	36%
Free internet access from public areas (pool, lobby, etc.)	34%
Swimming pool	33%
Located within walking distance of restaurants/bars	32%
All-inclusive stay package	32%
Consumer reviews	27%
Recommendation of friends/family	26%
Complimentary local transportation to restaurants/shopping	26%
Complimentary late check-out option	26%
24-hour room service	22%
Wellness focus	18%
On-site fitness center	16%
On-site spa	13%
Kids' club/organized family activities	13%
Pets allowed to stay in room	12%
Communal space to hang out, work or socialize	12%

Base: Likely to Visit Hawaii (n=745)

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Spring Edition"

Free Internet Access And Having A Refrigerator Are The Two Most Important In-Room Features When Selecting A Hotel For Those Likely To Visit Hawaii

Importance of In-Room Features/Attributes	% Find Important
Free-internet access	54%
Refrigerator (for personal use)	45%
Size and/or layout of room	38%
Proper water temperature and pressure	38%
Premium mattress	38%
Balcony	35%
Free bottled water in room	33%
Multiple electrical outlets for charging personal devices	33%
Microwave	32%
Premium soaps, shampoos, conditioners	32%
Premium bed linens	29%
Sound-proof room	27%
Free premium television channels (HBO, Starz, etc.)	26%
Free premium movie streaming channels (Netflix, Disney, etc.)	25%
Selection of pillows	23%
In-room dining service without additional fees or delivery charges	21%
Spa-style bathtub	20%
In-room mini-bar/refrigerator stocked with drinks/snacks	18%
Hardwood/tile flooring	16%
Remote access to guest room from smart phone	16%
Ability to watch in-room entertainment on personal mobile devices	13%
Biometric access to guest room	7%

Base: Likely to Visit Hawaii (n=745)

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Spring Edition"



ACCOMMODATIONS SUMMARY

KEY TAKEAWAY:

- Resorts and traditional chain-affiliated hotels are the most popular accommodations among Likely Hawaii Visitors. Hilton and Marriott garner the most interest followed by Hyatt, Holiday Inn, Sheraton and Doubletree. These travelers find location, cleanliness, value for the price, room rate and free breakfast to be important when choosing accommodations. As for in-room features, they find free-internet access and a refrigerator to be important.

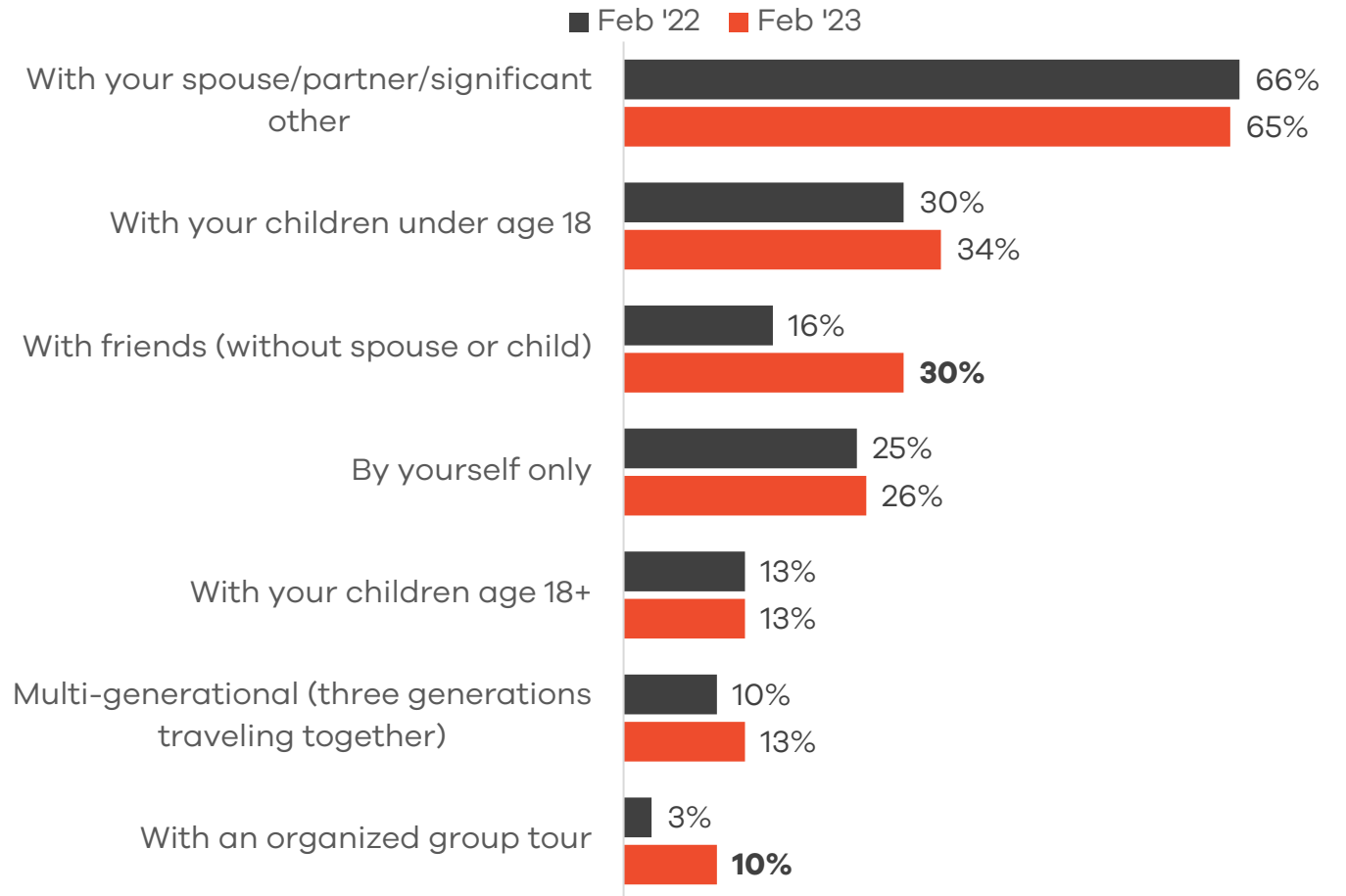


Vacation Motivators and Activities



Traveling With Friends Nearly Doubled Since Last Year For Likely Hawaii Visitors

Travel Party During the Next Six Months



Data in bold indicates a significant difference from February 2022.

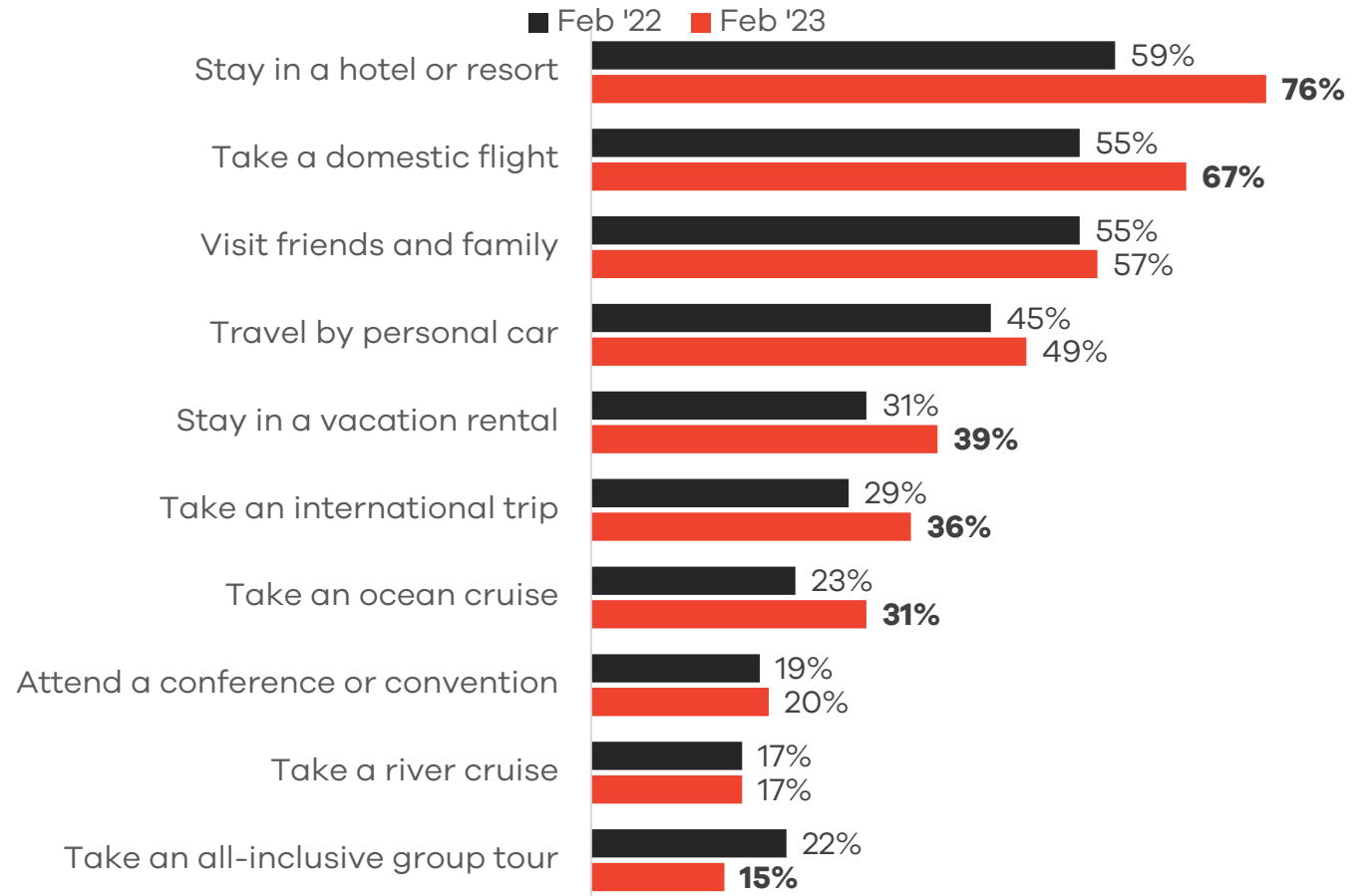
Base: Likely Hawaii Visitors who intend to travel during the next six months (n=688)

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Spring Edition"



More Than Three-Quarters Of Likely Hawaii Visitors Are Planning To Stay In A Hotel In The Next 6 Months

Travel Expectations in the Next 6 Months



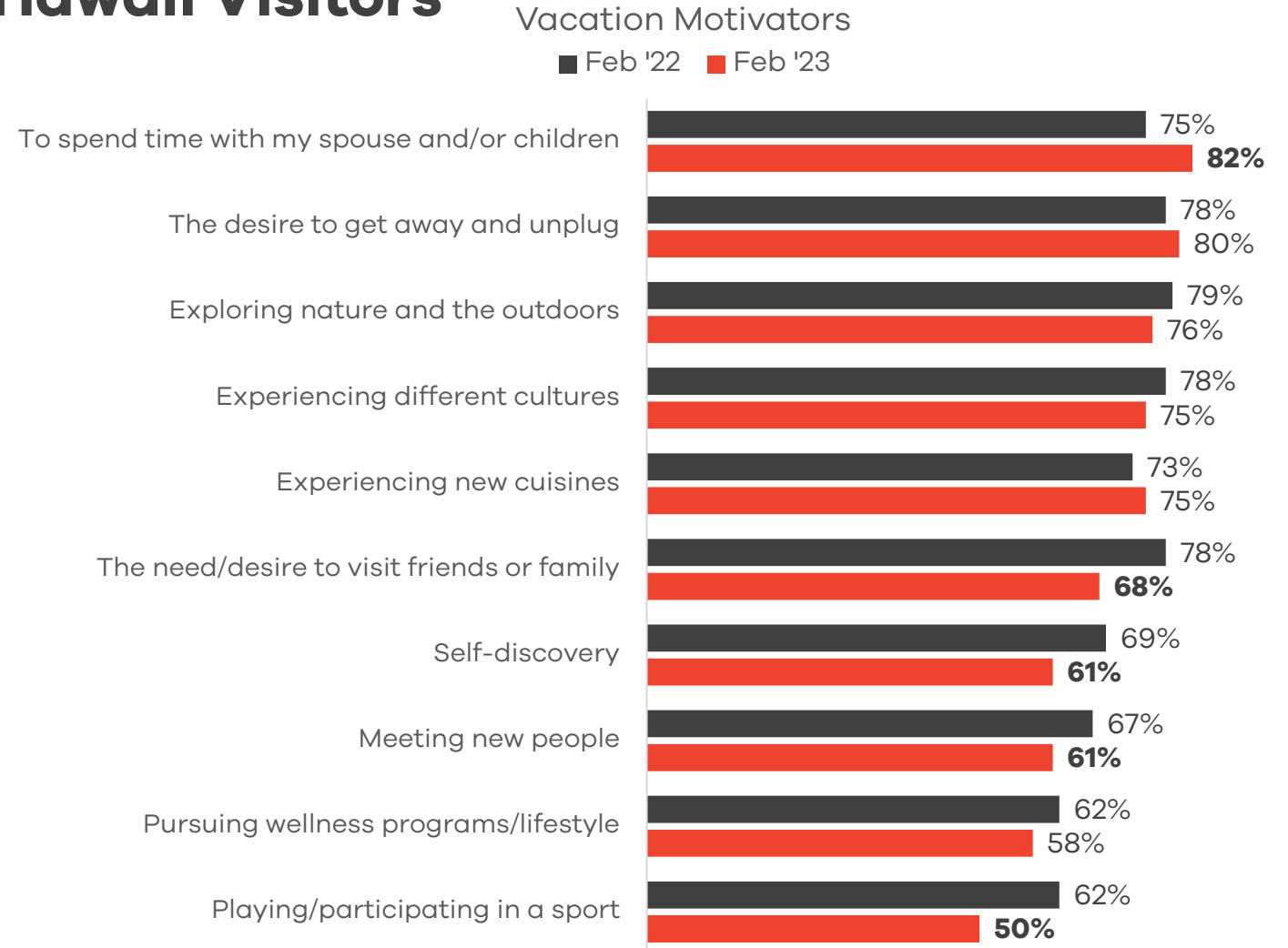
Data in bold indicates a significant difference from February 2022.

Base: Likely Hawaii Visitor who intend to travel during the next six months (n=688)

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Spring Edition"



Spending Time With Family and “Unplugging” Are The Top Motivators to Travel For Likely Hawaii Visitors



Data in bold indicates a significant difference from February 2022.

Base: Likely to Visit Hawaii (n=745)

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Spring Edition"

What Destination Attributes Influence Choice of Destination?

Influential When Selecting a Destination	Feb '22	Feb '23
Beautiful scenery	59%	65%
Safety	50%	58%
Food and drink scene	50%	58%
Historical significance of a destination	40%	48%
Outdoor/nature activities	42%	45%
Focus on family activities	33%	34%
A sense of tradition (place family has traditionally visited)	29%	33%
Music scene	23%	26%
The ethnic diversity and multicultural population of a destination	27%	25%
Nightlife/bars	25%	25%
The destination's reputation for environmental responsibility	27%	24%
The destination's commitment to social justice and equality	18%	18%
LGBTQ+ travel offerings	8%	11%

Data in bold indicates a significant difference from February 2022.

- / Beautiful scenery is the top feature travelers look for when selecting a destination.
- / The food and drink scene is equally as influential as the safety of the destination, and both rose significantly compared to last year.

Activities of Interest on Vacation

	Feb '22	Feb '23
Beach experiences	49%	55%
Shopping	41%	49%
Visiting a state or national park	37%	46%
Historical sites	41%	44%
Visiting a museum	35%	41%
Visiting a theme or amusement park	31%	38%
Hiking/climbing/biking/other outdoor adventures	29%	35%
Visiting notable architectural sites	27%	35%
Guided tours with access to local experiences that are otherwise inaccessible	26%	34%
Adventure travel (safaris, mountain climbing, trekking vacations, etc.)	26%	31%
Attending a concert/music festival	22%	31%
Attending a sporting event	20%	30%
Exploring family's ancestry/past on a heritage vacation	24%	28%
Spa Services (massages, facials, etc.)	21%	28%
Nightlife	23%	27%
Water sports (waterskiing, boating/rafting)	25%	26%
Casino gambling	22%	24%
Attending performing arts events	21%	23%
Film/art festivals	18%	23%
Snow skiing/snowboarding	17%	18%
Surfing	15%	16%
Scuba diving	17%	15%
Playing golf	15%	15%
Playing tennis	18%	11%

- / Beach experiences, shopping, and visiting a state or national park are the top features likely Hawaii visitors look for when selecting a destination.
- / Many activities increased in interest among likely Hawaii visitors compared to February '22.

Data in bold indicates a significant difference from February 2022.

Base: Likely to Visit Hawaii (n=745)

Source: MMGY Global's 2023 *Portrait of American Travelers* "Spring Edition"



VACATION MOTIVATORS & ACTIVITIES SUMMARY

KEY TAKEAWAY:

- The short-term travel plans of those likely to visit Hawaii include staying in a hotel or resort, taking a domestic flight and visiting friends and family. Two-thirds of these travelers are planning to travel with their significant other while 3 in 10 plan to travel with their children. Compared to Feb '22, significantly more of these travelers plan to stay in a hotel or resort, take a domestic flight, stay in a vacation rental, take an international trip or take an ocean cruise.
- Likely Hawaii Visitors are taking vacations to spend time with their spouse/children, to unplug, to explore nature and to experience different cultures. They're influenced by a destination's beautiful scenery, perceived safety and food and drink scene. On vacation they're most interested in beach experiences, shopping, and visiting state and national parks.

THANK YOU

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