



PORTRAIT OF AMERICAN TRAVELERS[®]

Summer 2024

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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 4,500 U.S. adults in May 2024.

This report primarily focuses on those *Likely Hawai'i Visitors*, 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 Hawai'i Visitors (4 or 5 on a 5-point scale). There were a total of 841 Likely Hawai'i 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 Zers	18–24	14%
Millennials	25–40	28%
Gen Xers	41–56	24%
Boomers	57–75	30%
Silent/GI	76+	3%



Key Insights

Key Insights

Hawai'i Tourism Proprietary Questions

- Interest in visiting Hawai'i saw a slight increase from last wave but is on par with reported interest in Summer 2023. Interest remains highest among younger generations.
- Among those who planned to visit Hawai'i but changed their mind, the most cited reasons for doing so are the costs associated to visit Hawai'i. One-quarter of likely Hawai'i visitors are likely to book their trip to Hawai'i within the next two years. This wave saw a significant increase in respondents saying they felt they could get better value at other destinations
- A third of Air travelers indicate the Maui wildfires impact their likelihood of visiting Hawai'i, with 8% saying they were likely to visit but are no longer likely to visit due to the fires, and 26% that they are still interested in visiting, but may not do so within the next two years.

Traveler Outlook

- Travel Intentions in the next 12 months of Likely Hawai'i Visitors were relatively unchanged from last year, reporting an average of 4.8 intended trips in Summer 2023 and 4.7 intended trips this wave. Spending intentions, however, increased significantly from \$6,291 in Summer 2023 to \$6,868 this wave. This is in line with the 71% of likely Hawai'i visitors who reported expectations to spend more on travel in the next 12 months than they have in recent years, with many citing the increased costs of food and lodging.
- Traveler sentiment stands at 129, A slight increase from Summer 2023 (124). Compared to summer 2023, traveler sentiment for travel affordability, time available and quality of service increased while perceived safety, and travel interest decreased.

Key Insights

Where People Want to Visit

- Interest in visiting the island of Hawai'i and Maui remained stable compared to Summer 2023. As did the remaining Hawai'ian destinations. Other than Hawai'ian destinations, Likely Hawai'i Visitors are most interested in visiting Las Vegas, the Florida Keys and New York City.

Diversity in Travel

- More than half (51%) of likely Hawai'i visitors feel they have to be more aware of their surroundings when traveling due to their identity. Significantly more than Summer '23 (50%) said they are more likely to visit a destination if they see diversity represented in their advertising.
- Significantly more likely Hawai'i visitors than Summer '23 said that they are influenced by a destination's commitment to diversity and inclusion when deciding where to vacation.
- The most influential factor is if a destination can offer diverse cultural experiences (Be they, for example, culinary or historic) that reflect visitors own culture.

Family Travel

- Likely Hawai'i visitors have greater intentions to travel with Children in the next month compared to Summer 23', with over half (52%) planning on travelling with kids compared to 38% previously.
- Children of likely Hawai'i visitors continue to influence their travel decisions, with 8 in 10 influencing daily activity planning and choosing a vacation destination.
- Compared to summer 2023, more likely Hawai'i visitors plan to take a multigenerational trip in the next 12 months. With 4 out of 10 considering such a trip compared to just over a third last summer.
- Just over half (51%) of likely Hawai'i visitors plan to travel for children to participate in a sporting event. Football, Basketball and Soccer are the most popular sports to travel for

Key Insights

Travel Advisors

- More likely Hawai'i visitors have used a travel agent compared to last year, and slightly more are planning to use one in the next two years.
- Of likely Hawai'i visitors planning to use a travel agent, two thirds (66%) intend to use them to book a package holiday / tour, whilst more than half (54%) plan to use them to book a cruise.
- The predominant reason likely Hawai'i visitors are using travel agents is to ensure peace of mind that they will receive the experiences that they have paid for. Compared to summer '23, significantly more are using them to discover experiences they wouldn't be able to find on their own.

Cannabis Tourism

- Compared to U.S Leisure Travelers, likely Hawai'i visitors are more open to Cannabis related experiences whilst travelling (23% vs 30%).

Traveler Perspectives

- Likely Hawai'i visitors are experiential travelers with 84% saying their vacation memories are worth more to them than any material item and 74% saying they prefer to pay for experiences over tangible things, a significant increase compared to Summer '23
- They are also increasingly influenced by the content they watch. With over half (53%) saying they have chosen a destination based on what they've seen on film or TV, up from 4 out of 10 in Summer '23

Vacation Motivators

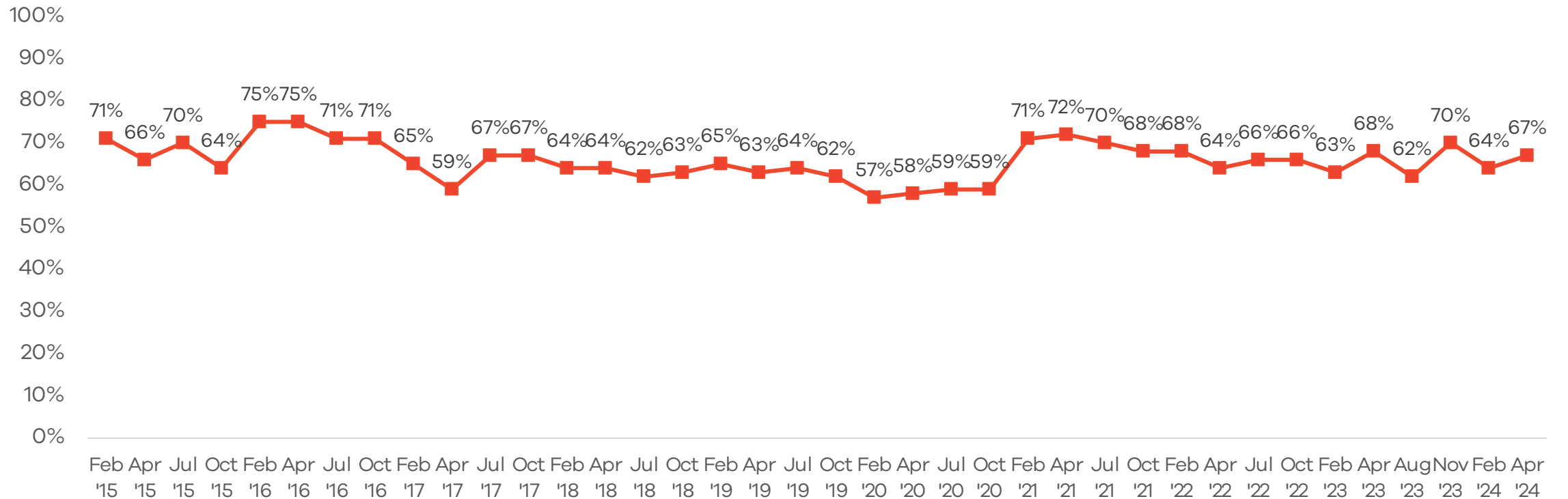
- Likely Hawai'i visitors are more digitally savvy than U.S Leisure travelers generally, with 46% of them having used Chat GPT for travel planning (compared to 28% overall).
- They use it to research flight options, suggest activities and accommodation.

Hawai'i Tourism Proprietary Questions



Interest in Visiting Hawai'i Has Increased From Last Wave But Is Unchanged From This Time Last Year.

Interest in Visiting Hawai'i Next Two Years
(Top 2 Box)



Hawai'i Tourism Proprietary Questions

Base: U.S. Leisure Travelers (n=3,591)

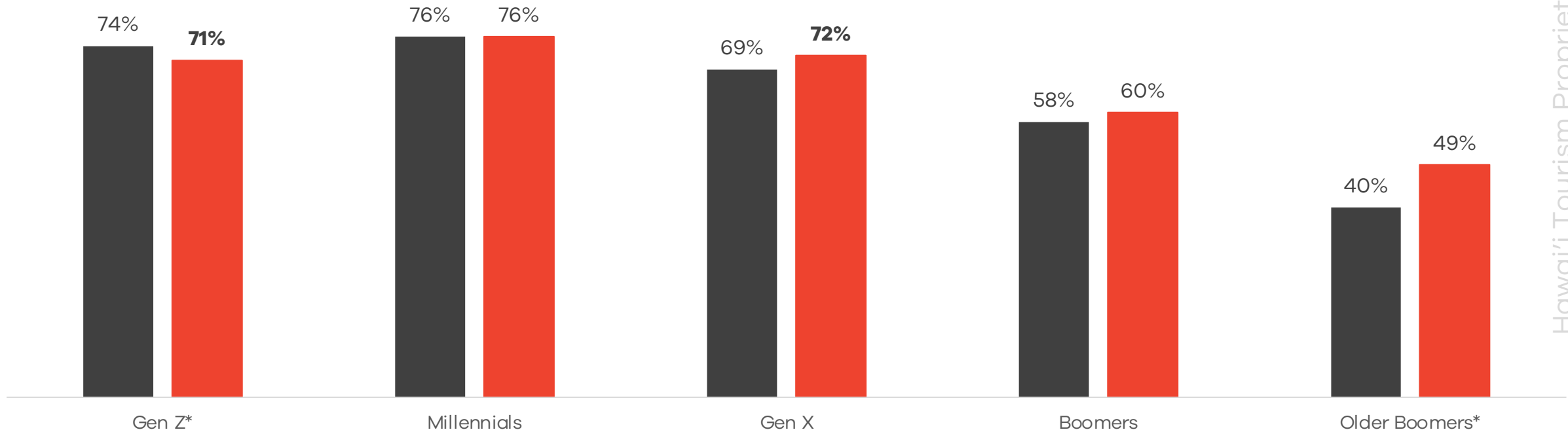
Source: MMGY Global's 2024 *Portrait of American Travelers*® "Summer Edition"



Interest in Visiting Hawai'i Remains High for Younger Generations.

Interest in Visiting Hawai'i
By Generation

■ 2023 ■ 2024



* Small sample size – Interpret with caution.

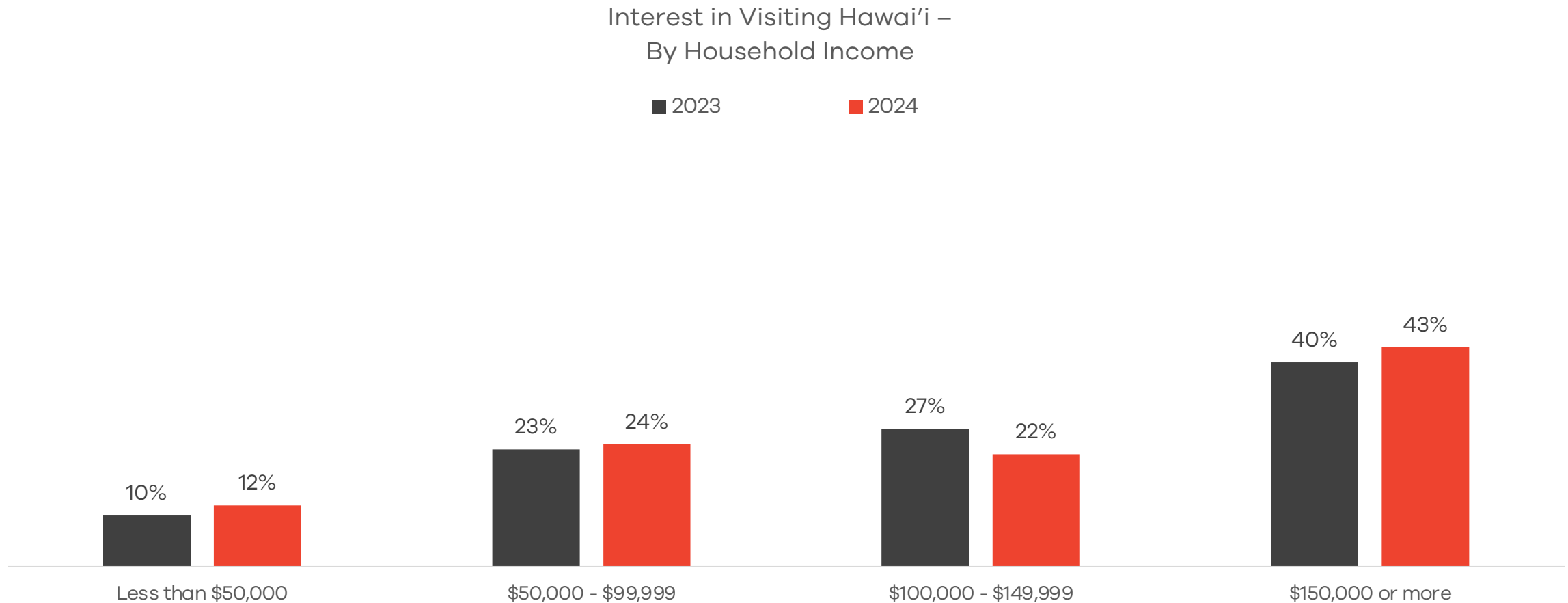
Data in bold indicates a significant difference from Spring 2023.

Base: U.S Leisure Travelers (n=3,591)

Source: MMGY Global's 2024 *Portrait of American Travelers*® "Summer Edition"

Hawai'i Tourism Proprietary Questions

More Than Two Fifths of Likely Hawai'i Visitors Are Drawn From The Highest Income Bracket



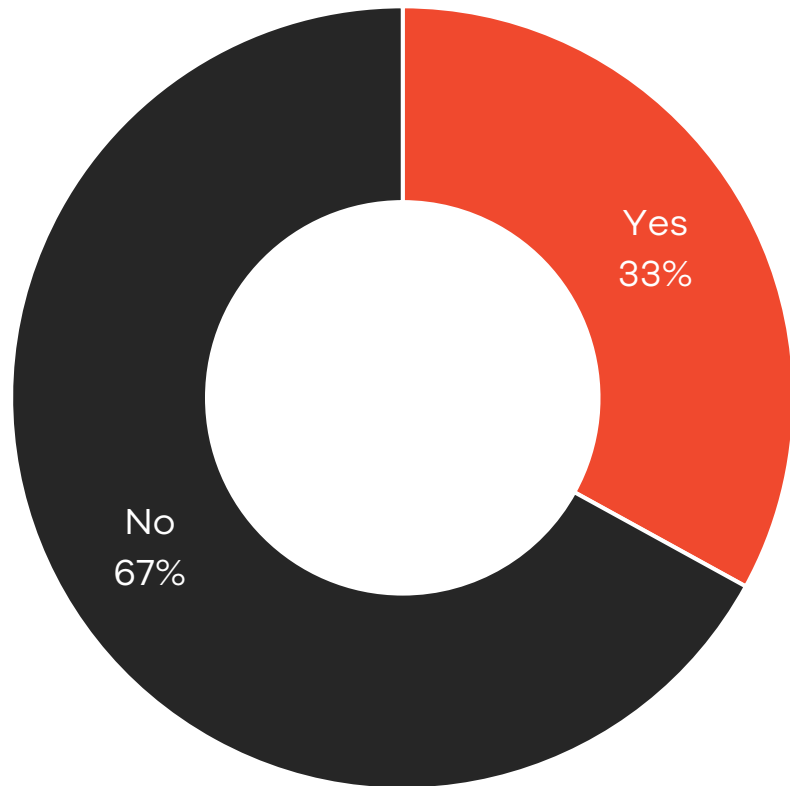
Data in bold indicates a significant difference from Summer 2023.

Base: Likely Hawai'i Visitors (n=841)

Source: MMGY Global's 2024 *Portrait of American Travelers*® "Summer Edition"

The Cost to Visit Hawai'i Continues To Be The Most Cited Deterrent To Visiting.

Considered Visiting Hawai'i But Changed Their Mind



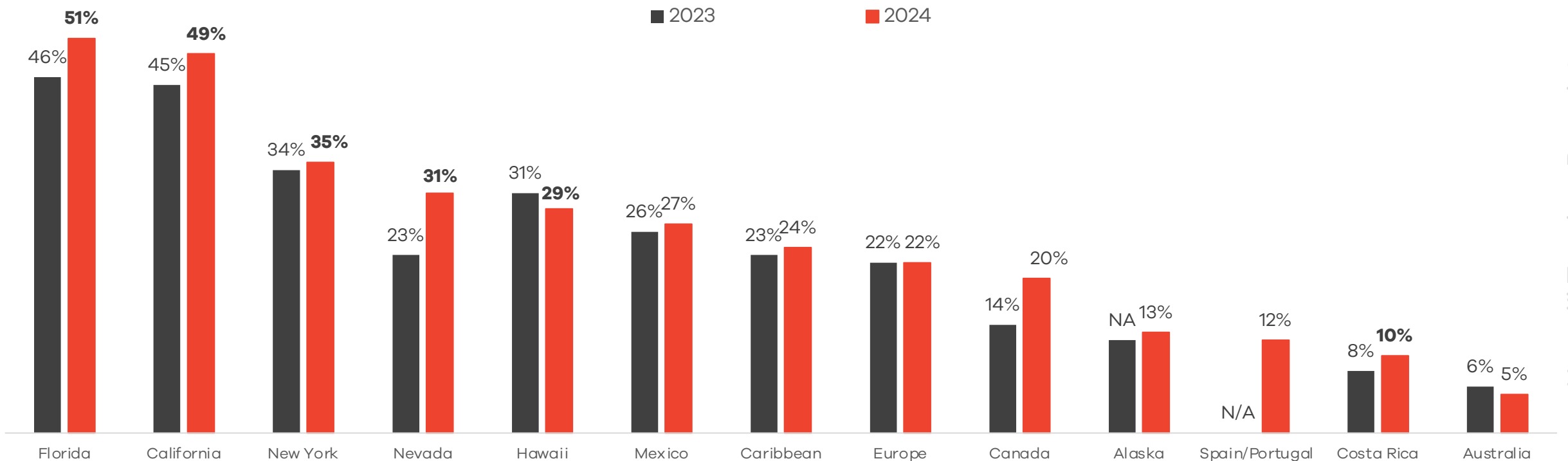
Reasons For Not Visiting Hawai'i – Among Those Who Changed Their Mind	2023	2024
Price of the airfare	40%	37%
Price of the vacation package	32%	30%
Price of the hotel	32%	30%
Better value at another destination	22%	27%
The flight to Hawaii is too long	23%	24%
Been to Hawaii before, I wish to try another destination	12%	13%
Concerns about COVID-19 variants	20%	12%
I have heard/read that Hawaii residents are opposed to visitors coming	NA	11%
I don't have enough time to travel to Hawaii	18%	10%
Not sure which island(s) in Hawaii to visit	9%	9%
Hurricanes and tropical storms hitting Hawaii	9%	8%
Hawaii is too crowded	13%	8%
I can find higher quality entertainment at other destinations	NA	8%
Accommodations were not available	9%	7%
Not enough dining option at a price point I can afford	NA	7%
Have heard rental cars are limited or not available	NA	7%
Hawaii is not unique and different enough from other destinations	7%	6%
Hawaii is not exotic enough	6%	5%
I do not feel comfortable visiting Hawaii at this time due to the fires on Maui	NA	4%
Not enough activities in Hawaii that interest me	NA	4%

Data in bold indicates a significant difference from Summer 2023

Base: Air Travelers (n=1,984) & Air Travelers Who Changed Their Mind (n=649)
Source: MMGY Global's 2024 *Portrait of American Travelers*® "Summer Edition"

Past Visitation To Hawai'i Decreased From Summer 2023, Increases were seen for Florida, California and Nevada.

Destinations Visited in Past Three Years
Among Those Likely Hawai'i Visitors



Data in bold indicates a significant difference from Summer 2023.

Base: Likely Hawai'i Visitors (n=841)

Source: MMGY Global's 2024 *Portrait of American Travelers*® "Summer Edition"

Hawai'i Tourism Proprietary Questions

More Than One Quarter of Likely Hawai'i Visitors are Likely to Book a Trip to Hawai'i Within the Next 2 Years.

Destinations Most Likely to Book in the Next Two Years	U.S. Leisure Travelers	Air Travelers	Likely Hawai'i Visitors
Hawai'i	13%	13%	28%
Another U.S. state	44%	39%	22%
Europe	14%	19%	20%
Caribbean	11%	12%	14%
Mexico	6%	7%	8%
Asia	5%	5%	6%
Oceania	2%	3%	3%
Other	5%	3%	2%

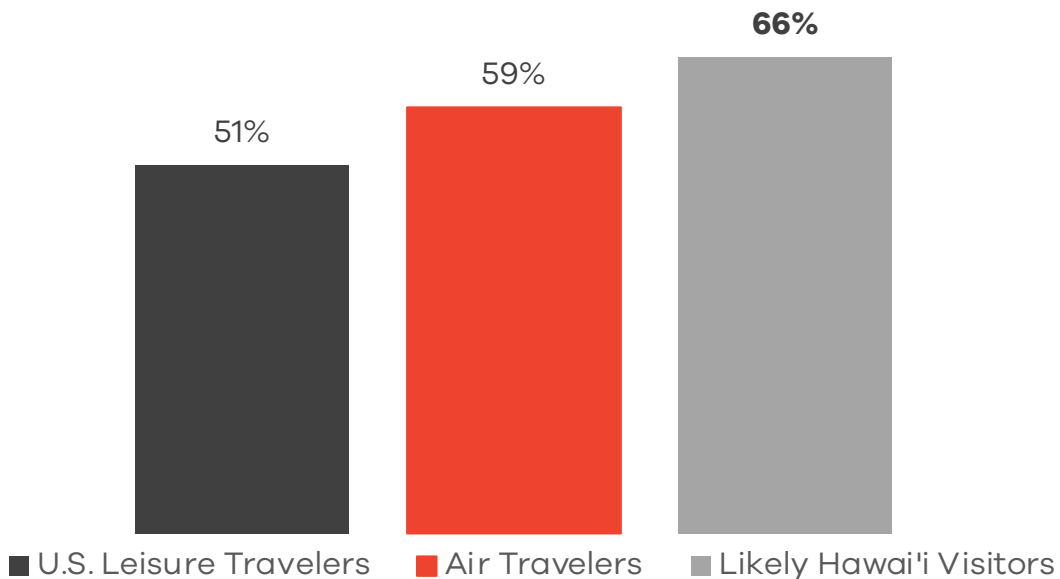
Data in bold indicates a significant difference from U.S. Leisure Travelers

Base: U.S. Leisure Travelers (n=3,591), Air Travelers (n=1,984), Likely Hawai'i Visitors (n=841)

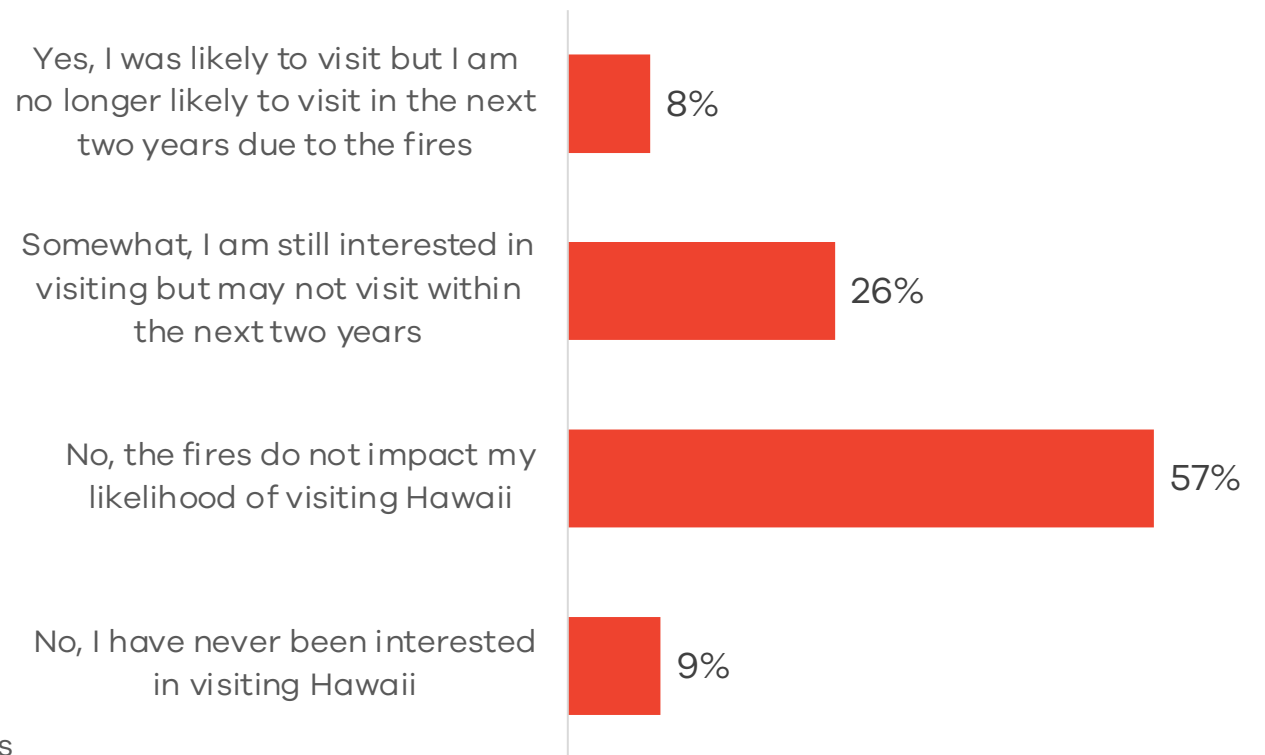
Source: MMGY Global's 2024 *Portrait of American Travelers*® "Summer Edition"

Just Over a Third of Air Travelers Say That the Maui Wildfires Will at Least Somewhat Impact Their Likelihood of Visiting Hawai'i Within the Next Two Years.

Awareness of Maui Fires



Impact of Maui Wildfires on Air Traveler Likelihood to Visit Hawai'i



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

Base: U.S. Leisure Travelers (n=3,591), Air Travelers (n=1,984), Likely Hawai'i Visitors (n=841)

Source: MMGY Global's 2024 *Portrait of American Travelers*® "Summer Edition"



The Hawai'i Prospect

Self-Described Personas

	U.S. Leisure Travelers	Likely Hawai'i Visitors
Beach lover	49%	58%
Foodie	41%	49%
Family traveler	39%	44%
Pet lover	43%	40%
Outdoor adventurer	29%	37%
Sports fan/enthusiast	28%	37%
Travel bargain hunter	30%	33%
Theme park enthusiast	25%	33%
World traveler	21%	32%
Environmentally-conscious	22%	30%
Wine enthusiast	19%	30%
Luxury traveler	16%	30%
Concert/festival enthusiast	24%	29%
Cruise lover	20%	26%
Moderate	25%	25%
All-inclusive resort enthusiast	21%	24%
Liberal	19%	24%
Video game enthusiast	19%	24%
Conservative	23%	22%
Cocktail enthusiast	15%	21%
Recreational cannabis user	13%	14%
Golf enthusiast	8%	13%
Ski/snowboard enthusiast	7%	13%
Social justice activist	8%	12%
Road warrior	5%	11%

Base: U.S. Leisure Travelers (n=3,574), Likely Hawai'i Visitors (n=841)

Source: MMGY Global's 2024 *Portrait of American Travelers*® "Summer Edition"

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

Demographics

	U.S. Leisure Travelers	Likely Hawai'i Visitors
Male	47%	51%
Female	49%	47%
Other	1%	0%
Gen Zers	14%	11%
Millennials	29%	43%
Gen Xers	24%	23%
Young Boomers	17%	15%
Older Boomers	12%	7%
Have children under 18 at home	32%	50%
White	74%	72%
Hispanic	17%	18%
African American/Black	15%	14%
Asian	8%	9%
Native American	2%	2%
Pacific Islander	1%	2%
Other	4%	3%

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

Demographics

	U.S. Leisure Travelers	Likely Hawai'i Visitors
Under \$30,000	14%	4%
\$30,000–\$49,999	12%	8%
\$50,000–\$74,999	18%	14%
\$75,000–\$99,999	10%	10%
\$100,000–\$124,999	11%	12%
\$125,000–\$149,999	8%	10%
\$150,000–\$249,999	20%	30%
\$250,000–\$499,999	5%	11%
\$500,000 or more	1%	2%
4 years or less of high school	38%	21%
1–3 years of college	26%	23%
4 years of college	22%	34%
Some graduate school	3%	2%
Graduate/professional degree	10%	19%

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

Base: U.S. Leisure Travelers (n=3,574), Likely Hawai'i Visitors (n=841)

Source: MMGY Global's 2024 *Portrait of American Travelers*® "Summer Edition"

Demographics

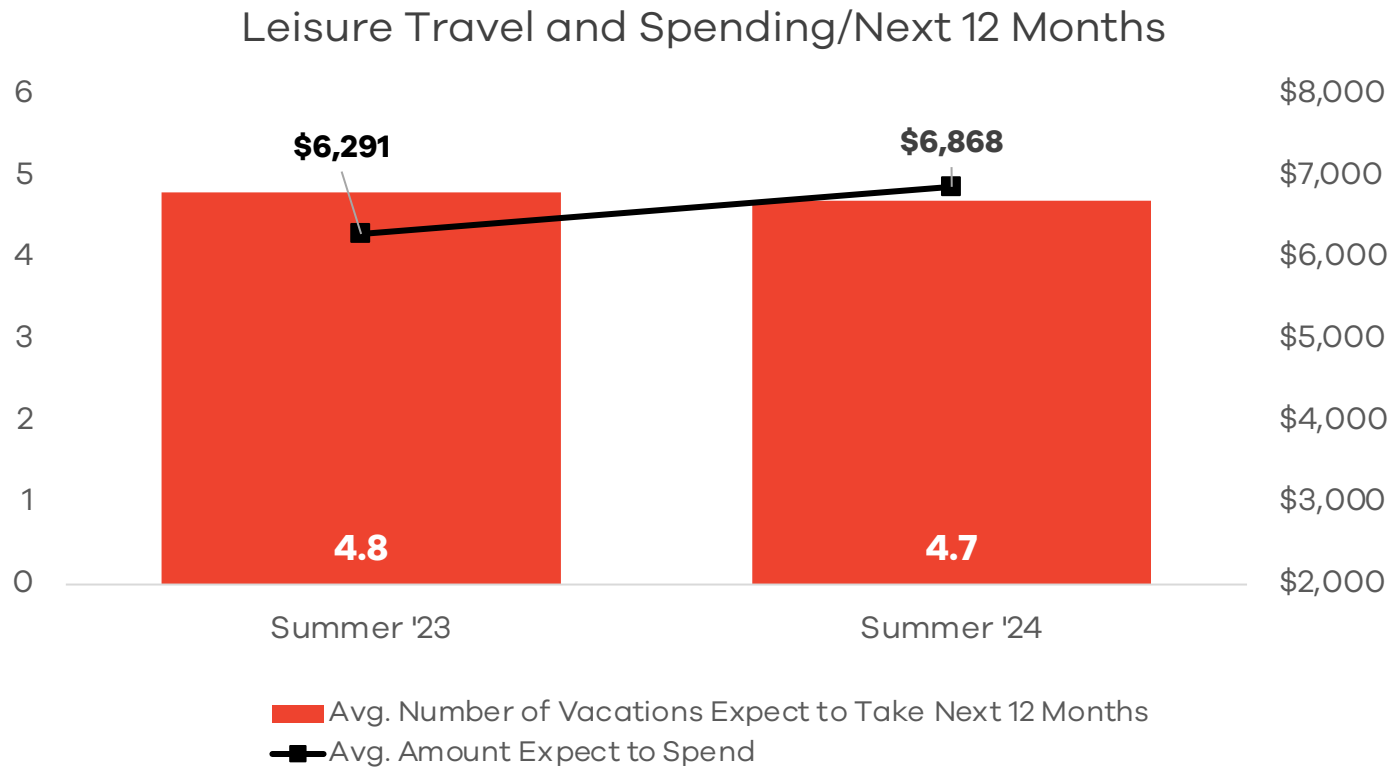
	U.S. Leisure Travelers	Likely Hawai'i Visitors
South	39%	32%
West	24%	35%
Midwest	20%	15%
Northeast	17%	18%
Employed (full or part-time)	56%	76%
Retired	23%	15%
Temporarily unemployed	10%	3%
Homemaker (full-time)	7%	4%
Student	4%	2%
Married/living together	61%	73%
Never married	26%	20%
Divorced/separated/widowed	13%	8%

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



Travel Outlook Snapshot

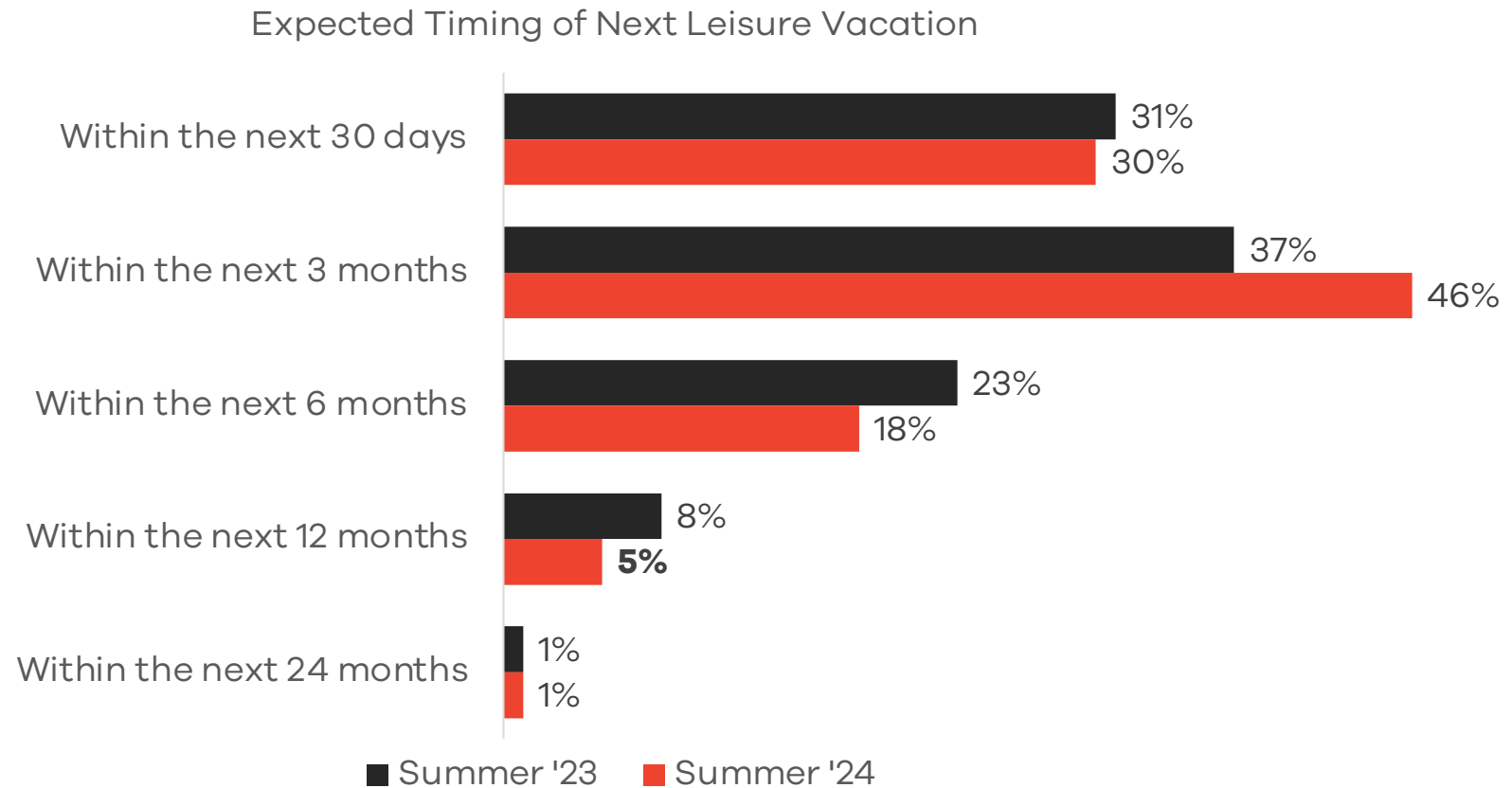
Despite travel intentions remaining similar to last year, expected spend is up Slightly.



While travel intentions are unchanged from Summer 2023, spending intentions are up slightly. This is in line with the 71% of likely Hawai'i visitors who reported expectations to spend more on travel in the next 12 months than they have in recent years, with many citing the increased costs of attractions, food, lodging, and air travel.

Traveler Intentions: Over Time

Travel Intentions Within the Next 3 Months Have Increased From Summer 2023.



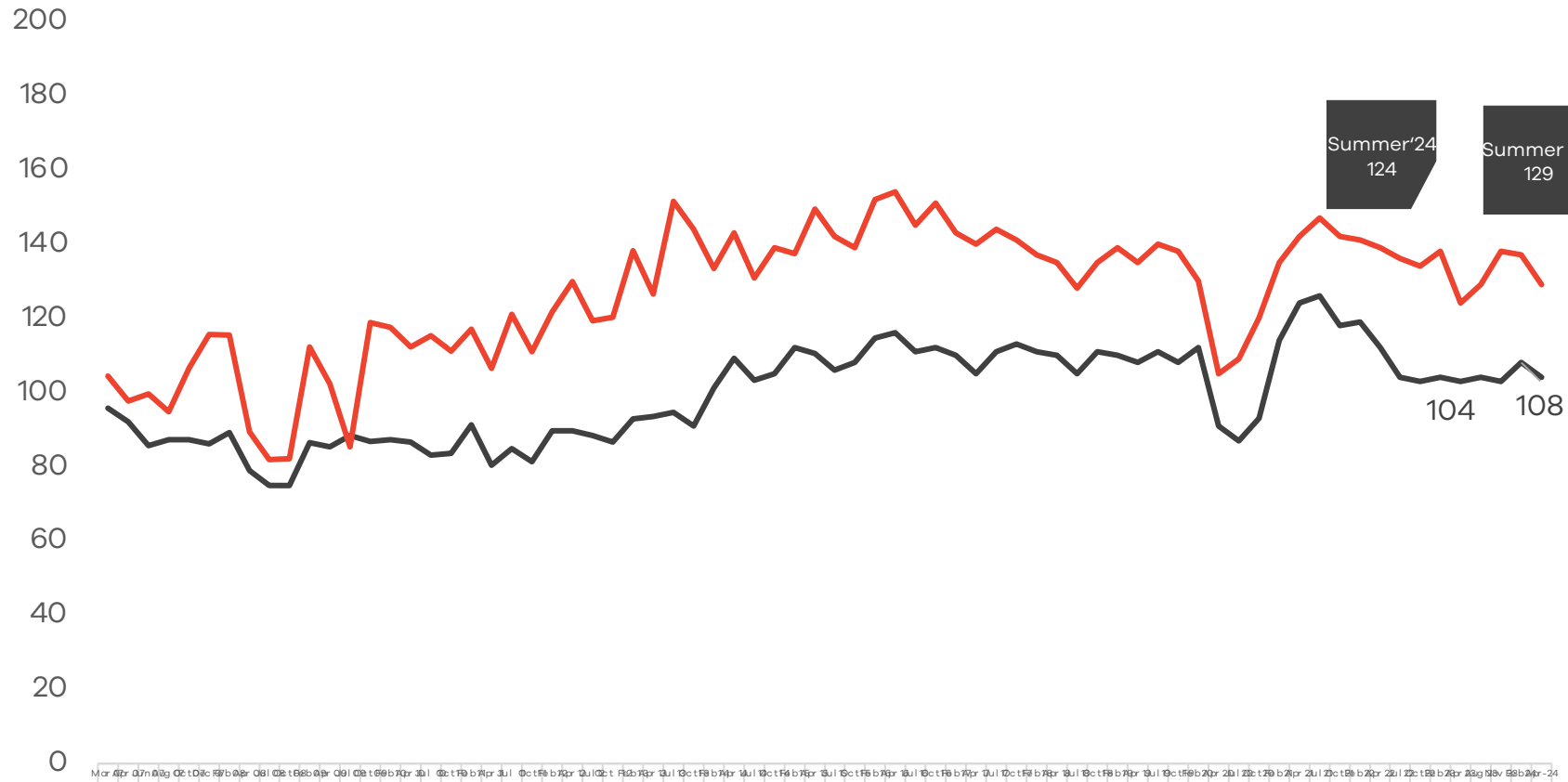
Traveler Intentions: Over Time

Data in bold indicates a significant difference from Spring 2023.

Base: Likely Hawai'i Visitors (n=841)

Source: MMGY Global's 2024 *Portrait of American Travelers*® "Summer Edition"

Overall Traveler Sentiment Score: Slight Increase From This Time Last Year.



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.

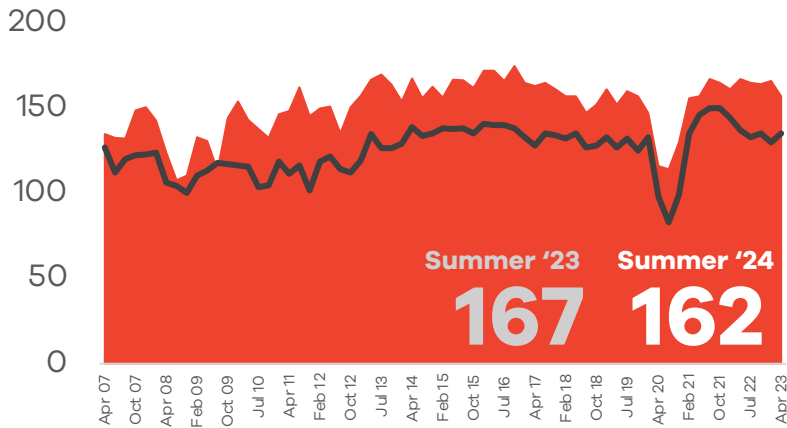
Traveler Sentiment Index™

Base: U.S. Adults (n=4,500) & Likely Hawai'i Visitors (n=841)
Source: MMGY Global's 2024 *Portrait of American Travelers*® "Summer Edition"

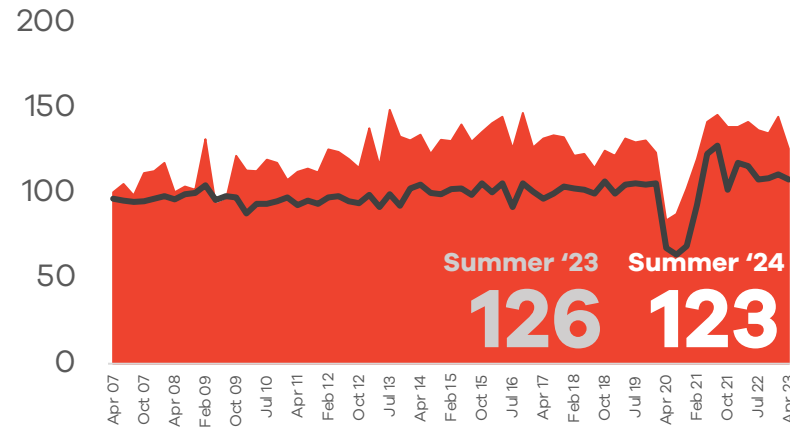


Compared to Summer 2023, Traveler Sentiment for Travel Affordability, Time Available and Quality of Service Increased While Perceived Safety, and Travel Interest Decreased.

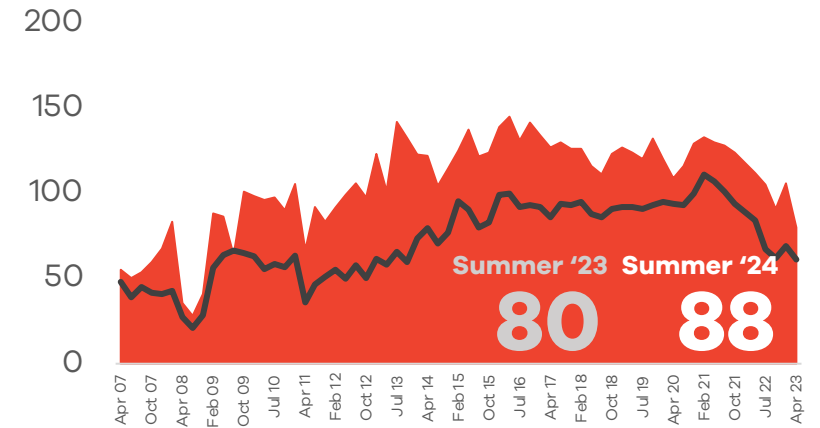
Interest in Travel



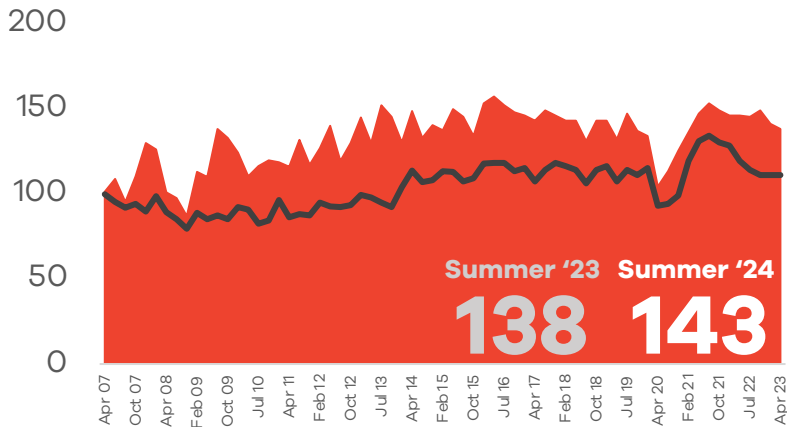
Perceived Safety of Travel



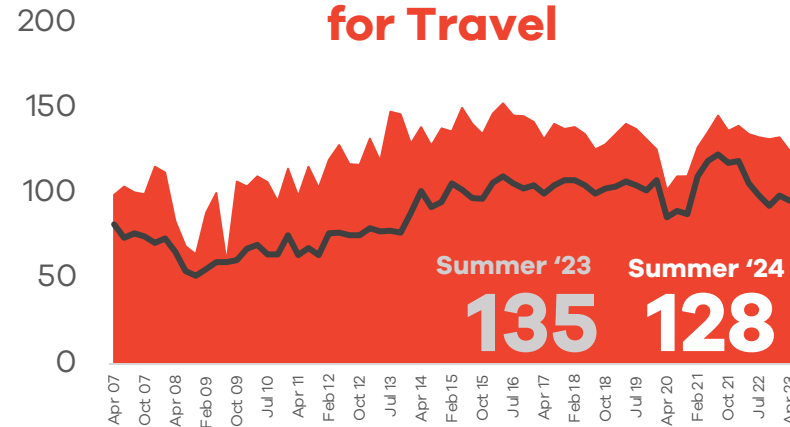
Affordability of Travel



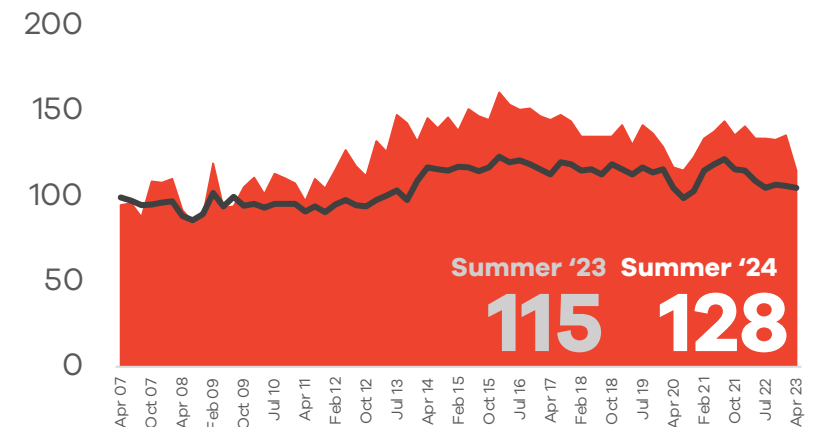
Time Available for Travel



Personal Finances Available for Travel



Quality of Service of Travel



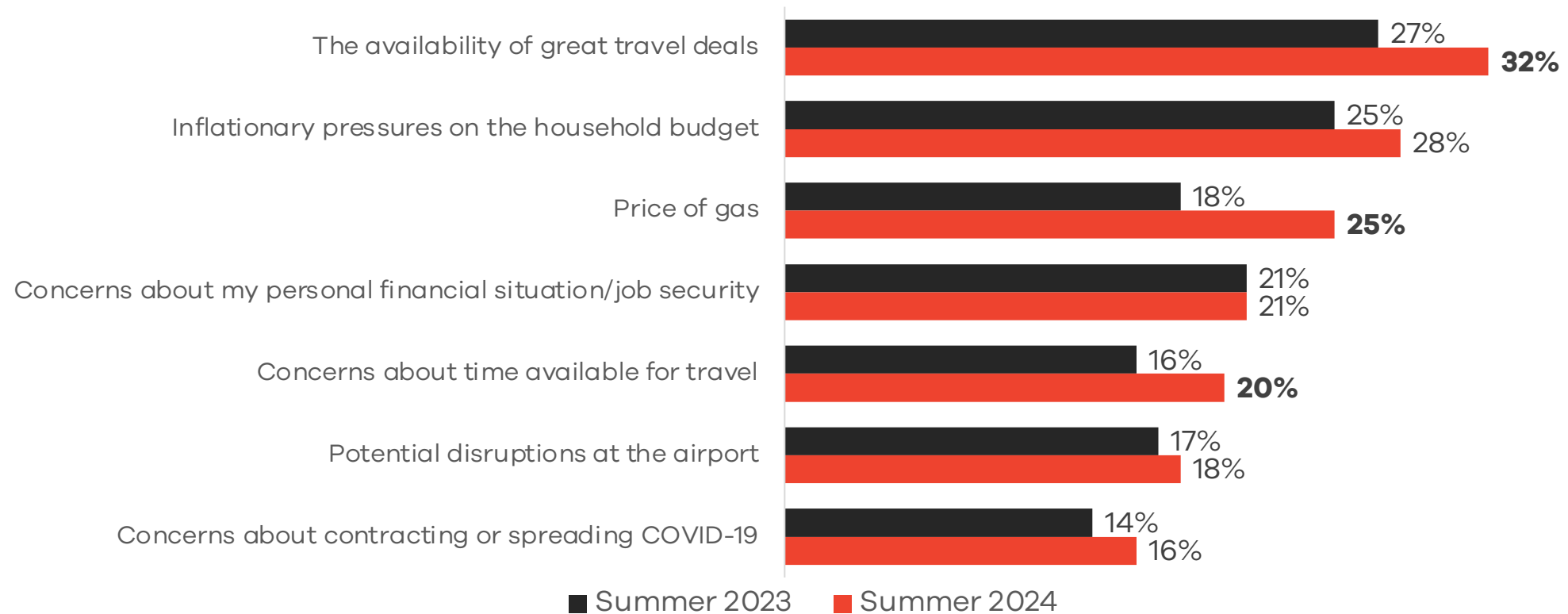
Traveler Sentiment Index™

Base: U.S. Adults (n=4,500) (Black line) & Likely Hawai'i Visitors (n=841) (Red fill)

Source: MMGY Global's 2024 *Portrait of American Travelers*® "Summer Edition"

Significantly More Likely Hawai'i Visitors Are Impacted By Gas Prices and The Availability of travel Deals Compared to Summer 2024.

% Who Are Extremely Impacted By...



Barriers To Travel

Data in bold indicates a significant difference from Spring 2023.

Base: Likely Hawai'i Visitors (n=841)

Source: MMGY Global's 2024 *Portrait of American Travelers*® "Summer Edition"



Where People Want to Visit

California, Florida, Colorado and Alaska Are The Other Top States of Interest Among Likely Hawai'i Visitors.

Top 20 States of Interest	2023	2024
California	65%	74%
Florida	67%	73%
Colorado	61%	70%
Alaska	63%	67%
New York	59%	65%
Arizona	54%	62%
Nevada	57%	60%
Texas	48%	57%
Washington	48%	54%
Maine	36%	49%
North Carolina	43%	48%
Montana	38%	47%
Oregon	40%	47%
Tennessee	42%	46%
Georgia	43%	46%
South Carolina	41%	44%
Massachusetts	35%	44%
Louisiana	38%	43%
New Mexico	36%	43%
Utah	35%	41%

Destinations of Interest

Base: Likely Hawai'i Visitors (n=841)

Data in bold indicates a significant difference from Summer 2023.

Source: MMGY Global's 2024 Portrait of American Travelers® "Summer Edition"

Other Than Hawai'i Destinations, Likely Hawai'i Visitors Are Also Interested in Visiting Las Vegas, The Florida Keys and New York

Top 20 Destinations of Interest	2023	2024
Island of Hawai'i (aka Big Island)	83%	82%
Maui, HI (W2'2021+)	80%	82%
Honolulu, HI (including Waikiki)	82%	81%
Kaua'i, HI (W2'2021+)	78%	80%
Lanai, HI (2023+)	69%	70%
Las Vegas, NV	66%	66%
Florida Keys/Key West, FL	64%	66%
New York City, NY	61%	65%
San Diego, CA	59%	65%
Miami, FL	55%	62%
Orlando, FL	58%	61%
San Francisco, CA	51%	60%
Napa Valley, CA	50%	60%
Denver, CO	44%	58%
Niagara Falls, NY	50%	57%
Los Angeles, CA	52%	57%
New Orleans, LA	51%	56%
Palm Beach, FL	50%	56%
Washington, DC	45%	56%
Tampa/St. Petersburg/Clearwater, FL	57%	55%

Destinations of Interest

Base: Likely Hawai'i Visitors (n=841)

Data in bold indicates a significant difference from Summer 2023.

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

Significantly More Likely Hawai'i Visitors Are Interested in Visiting Europe and Asia Than Did So Last Year.

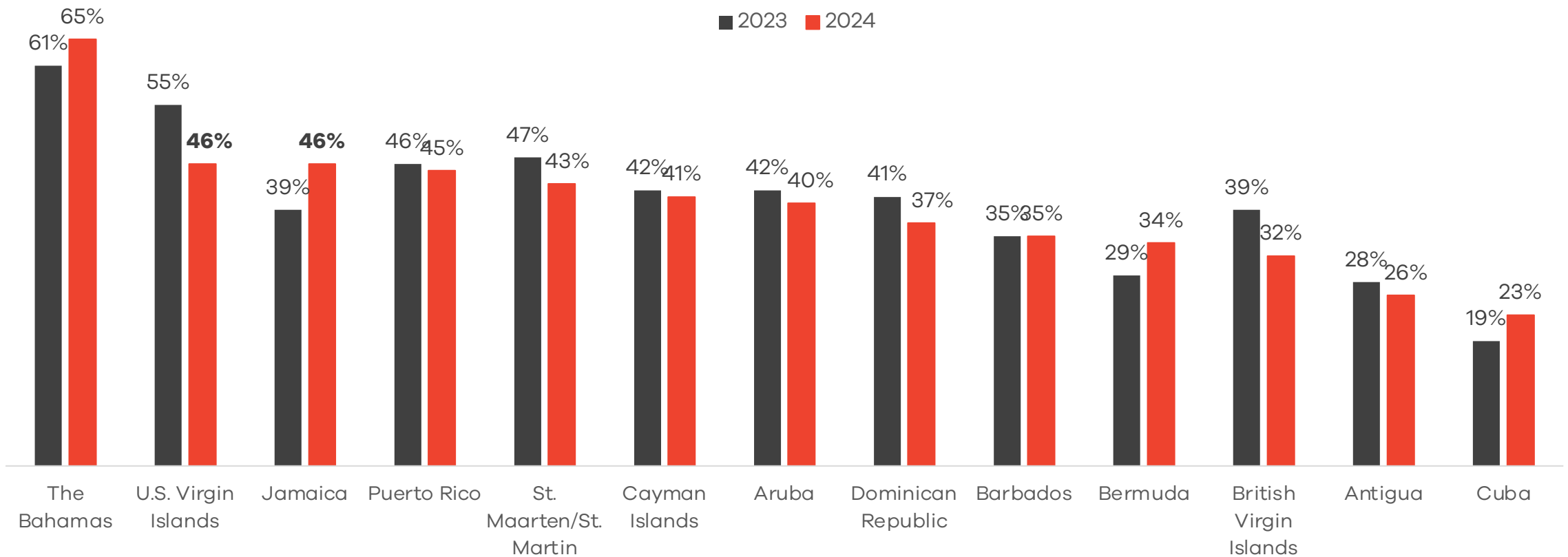
International Destinations of Interest	2023	2024
Europe	53%	61%
The Caribbean	47%	47%
Canada	40%	41%
Mexico	34%	38%
Asia	25%	29%
Oceania	18%	27%
South America	21%	22%
Central America	19%	22%
Africa	11%	12%
Middle East	9%	11%

Data in bold indicates a significant difference from Summer 2023.

Destinations of Interest

Interest in Visiting Jamaica Rose Significantly From Summer 2023.

Caribbean Destinations of Interest



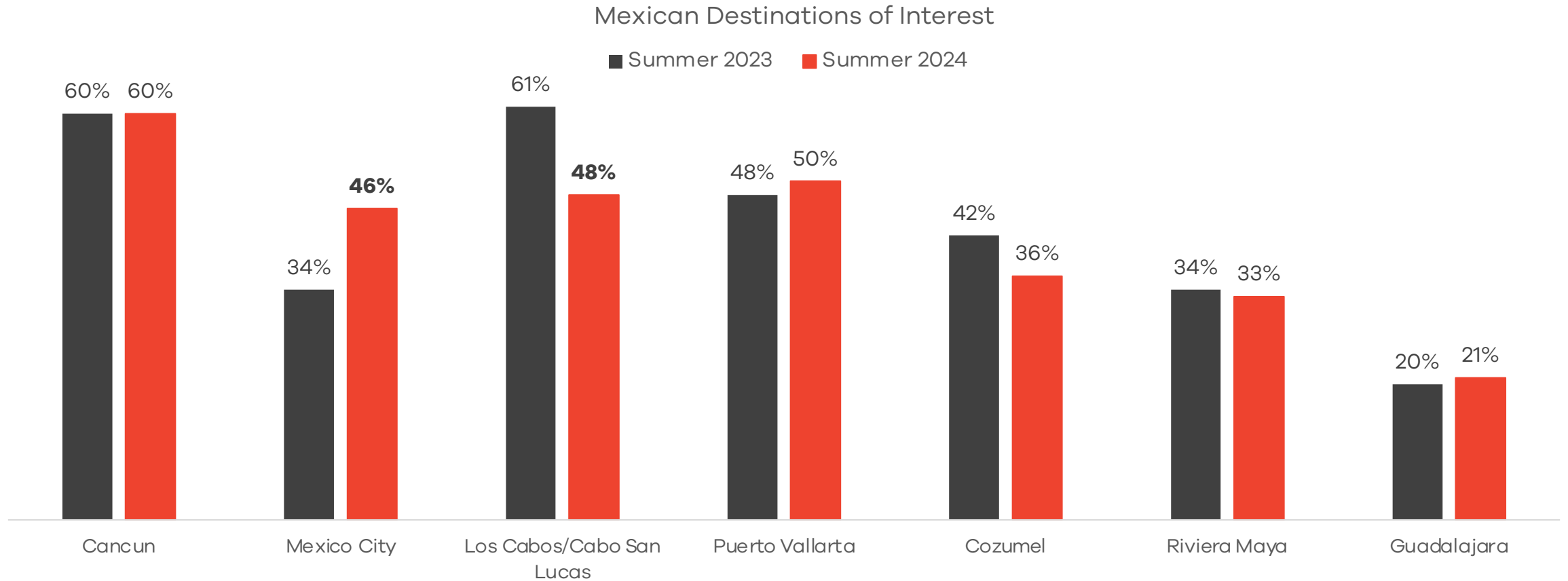
Destinations of Interest

Data in bold indicates a significant difference from Summer 2023.

Base: Likely Hawai'i Visitors & Interested in Visiting The Caribbean (n=383)

Source: MMGY Global's 2024 Portrait of American Travelers® "Summer Edition"

Likely Hawai'i Visitors' Interest in Visiting Mexico City Increased From Summer 2023, While Interest in Visiting Los Cabos Decreased.



Data in bold indicates a significant difference from Spring 2023.

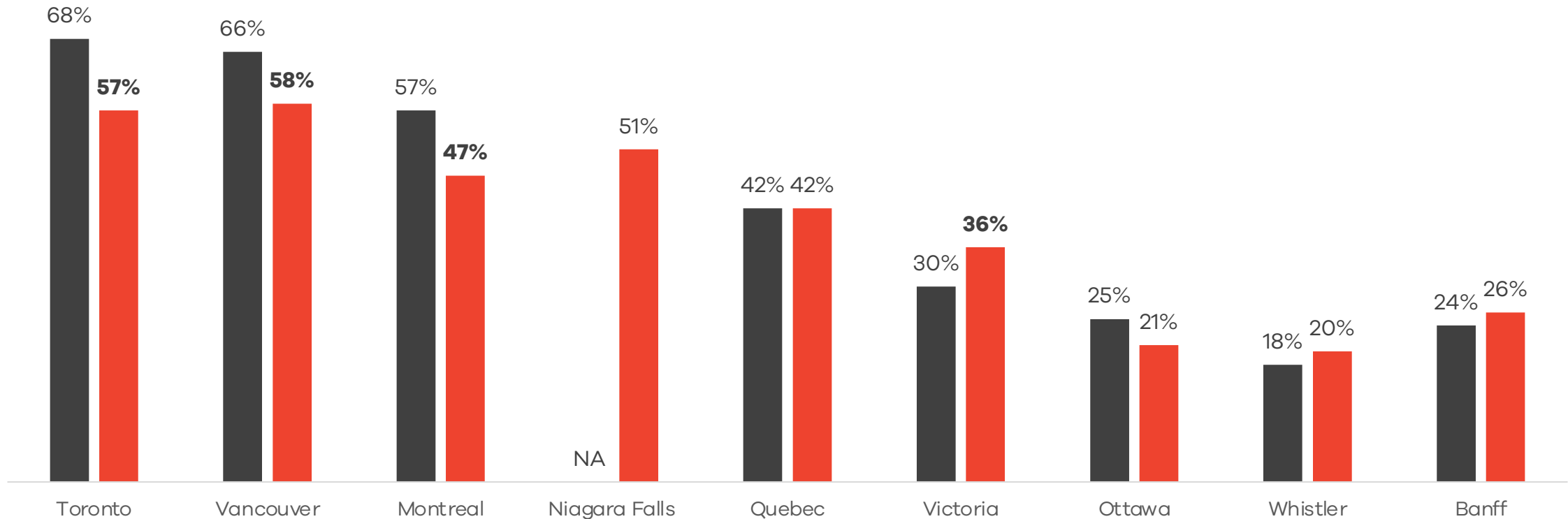
Base: Likely Hawai'i Visitors & Interested in Visiting Mexico (n=304)

Source: MMGY Global's 2024 Portrait of American Travelers® "Summer Edition"

Interest in Visiting Toronto, Vancouver and Montreal Decreased Significantly From Last Year, While Interest in Visiting Victoria Increased.

Canadian Destinations of Interest

■ Summer 2023 ■ Summer 2024



Destinations of Interest

Data in bold indicates a significant difference from Spring 2023.

Base: Likely Hawai'i Visitors & Interested in Visiting Canada (n=371)

Source: MMGY Global's 2024 Portrait of American Travelers® "Summer Edition"

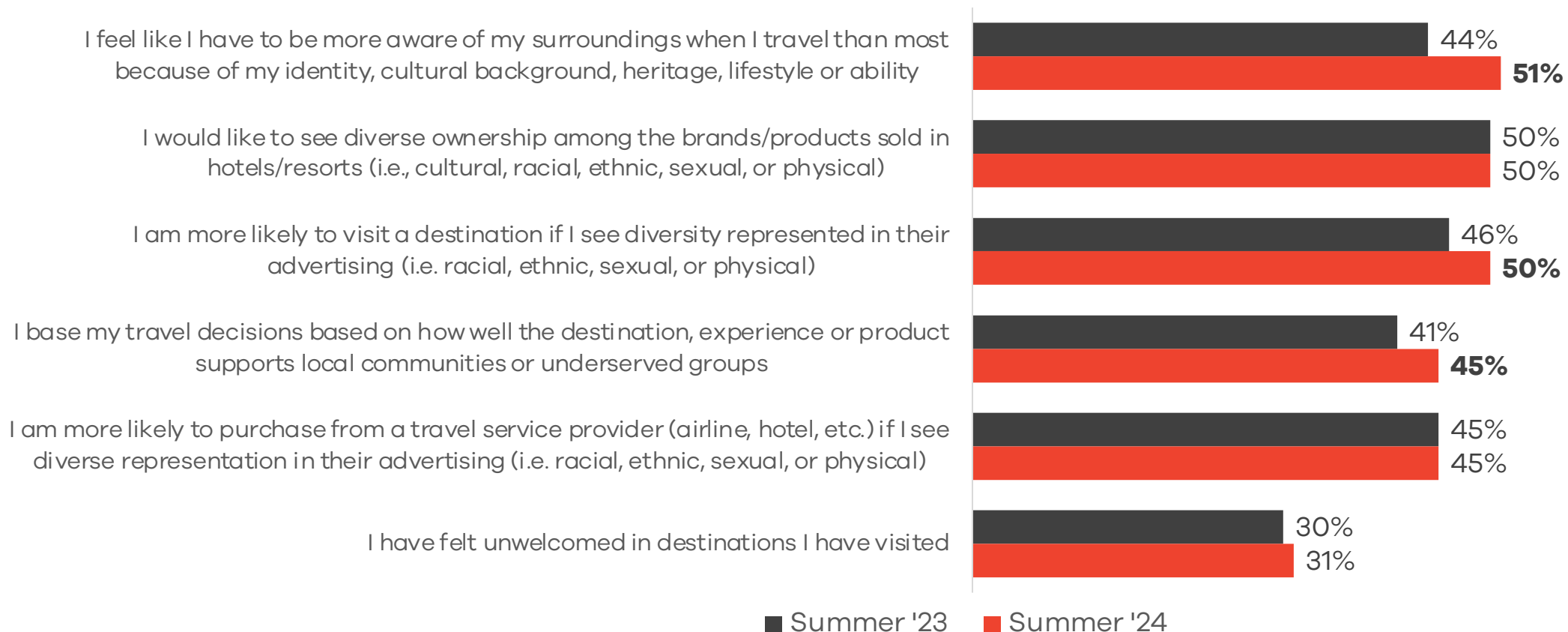
An aerial photograph of a coastal city, likely Honolulu, Hawaii. The foreground shows a sandy beach with some people and palm trees. The middle ground is filled with a dense urban landscape, including a prominent pinkish-orange building with a central tower. The background features a range of green mountains under a blue sky with light clouds. The text 'Summer Module' is overlaid in the top right corner in a white, cursive font.

Summer Module

Diversity in Travel

More Than Half of Likely Hawai'i Visitors Feel They Have To Be More Aware Of Their Surroundings When Traveling Due To Their Identity

Diversity Statements: % Agree



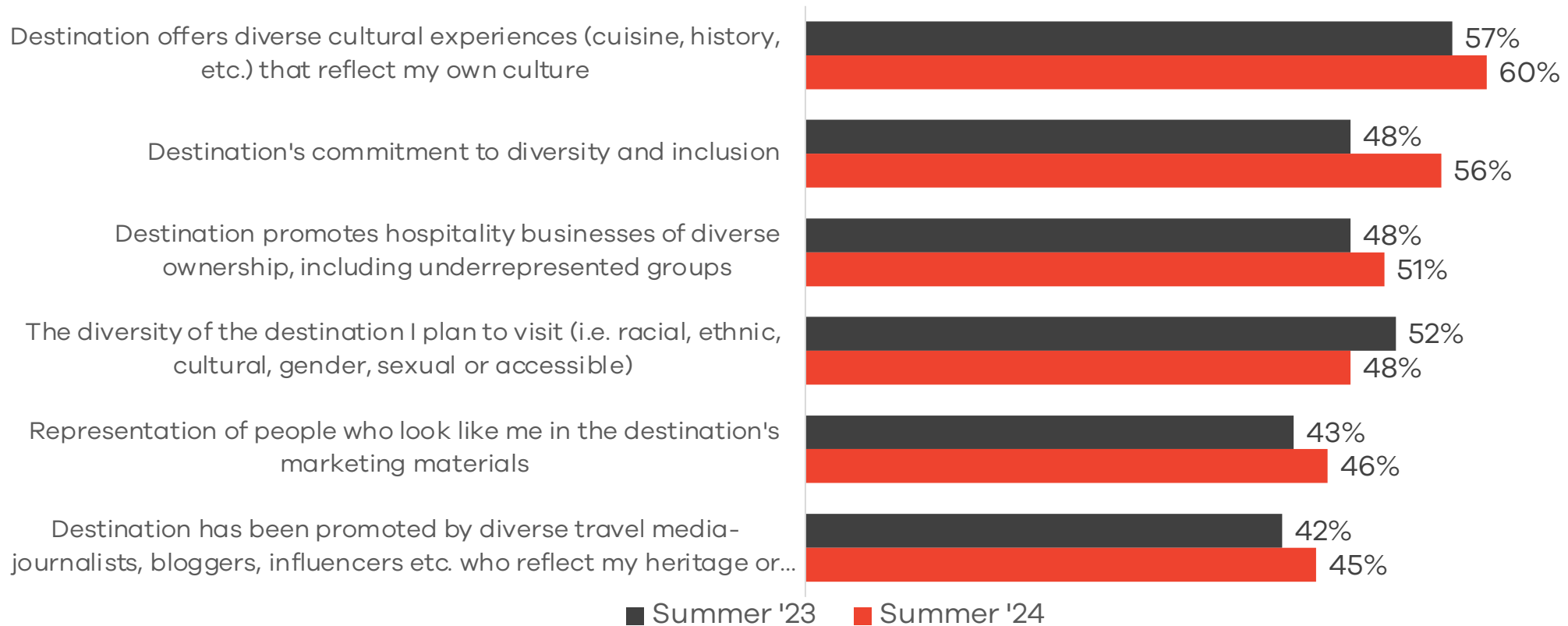
Data in bold indicates a significant difference from Summer '23

Base: Likely Hawai'i Visitors (n=841)

Source: MMGY Global's 2024 *Portrait of American Travelers*® "Summer Edition"

Likely Hawai'i Visitors Are Choosing Destinations That Offer Diverse Cultural Experiences and Have a Commitment to Diversity and Inclusion.

Influential Factors When Choosing a Leisure Destination



Diversity in Travel

Data in bold indicates a significant difference from Summer '23

Base: Likely Hawai'i Visitors (n=841)

Source: MMGY Global's 2024 *Portrait of American Travelers*® "Summer Edition"

43%
2023

42%
2024

of Best Western Prospects believe there are racial, ethnic, sexual and/or physical inequities when it comes to the travel industry

60%
2023

53%
2024

of respondents believe the travel industry is making strides to address the inequities

4 out of 10 Likely Hawai'i Visitors believe there are inequities in the travel industry, Just Over Half of these respondents believe the industry is making strides to address the inequities.

A tropical landscape at sunset. The sun is low on the horizon, casting a warm glow over a body of water. Palm trees and other tropical vegetation are visible in the foreground and background. A large, dark, diagonal shape is overlaid on the left side of the image.

Summer Module

Family Travel

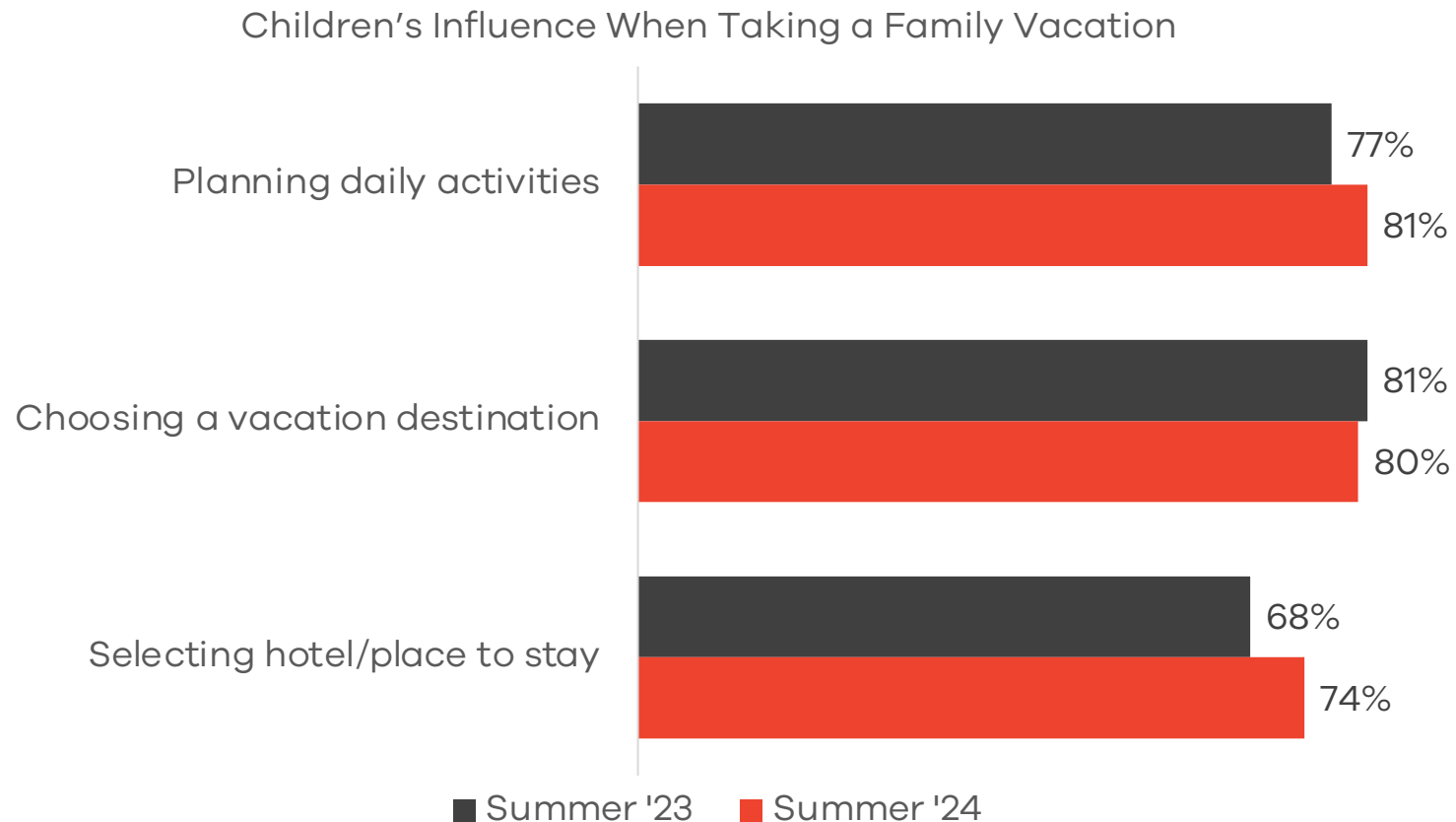
Likely Hawai'i visitors have greater intentions to travel with children during the next 12 months Compared to Summer '23



of likely Hawai'i visitors plan to travel with children under 18 during the next 12 months



Children of Likely Hawai'i Visitors Continue To Influence Their Travel Decisions, With 8 in 10 Influencing Daily Activity Planning And Choosing A Vacation Destination



Family Travel

Data in bold indicates a significant difference from Summer 2023

Base: Have children & Likely Hawai'i Visitors (n=420)

Source: MMGY Global's 2024 *Portrait of American Travelers*® "Summer Edition"



Compared to Summer 2023, More Likely Hawai'i Visitors Plan to Take a Multigenerational Trip in the Next 12 Months.

36%
2023

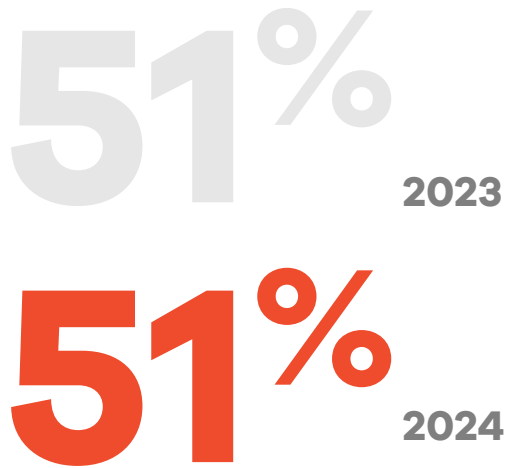
42%
2024

of Likely Hawai'i plan to travel with three or more generations of your family in the next 12 months

Family Travel

Base: Likely Hawai'i Visitors (n=715)
Source: MMGY Global's 2024 *Portrait of American Travelers*
"Summer Edition"

Traveling For Children's Sporting Events



Likely Hawai'i visitors plan to travel for children to participate in a sporting event*

Type of Sport*	2023	2024
Football	39%	53%
Basketball	38%	57%
Soccer	36%	43%
Baseball	49%	35%
Swimming	23%	35%
Volleyball	20%	23%
Tennis	20%	25%
Cheerleading	13%	11%
Field hockey	12%	12%
Lacrosse	10%	5%
Other	5%	5%

Family Travel

* Among those who plan to travel for their children to participate in a sporting event

Base: Have children & Likely Hawai'i Visitors (n=420)

Source: MMGY Global's 2024 *Portrait of American Travelers*® "Summer Edition"

Summer Module

Travel Advisors

Slightly More Likely Visitors Are Planning to Use the Services of a Travel Advisor Compared to Last Year.

31%
2023

39%
2024

of likely Hawai'i visitors have used the services of a travel advisor during the past 2 years

39%
2023

43%
2024

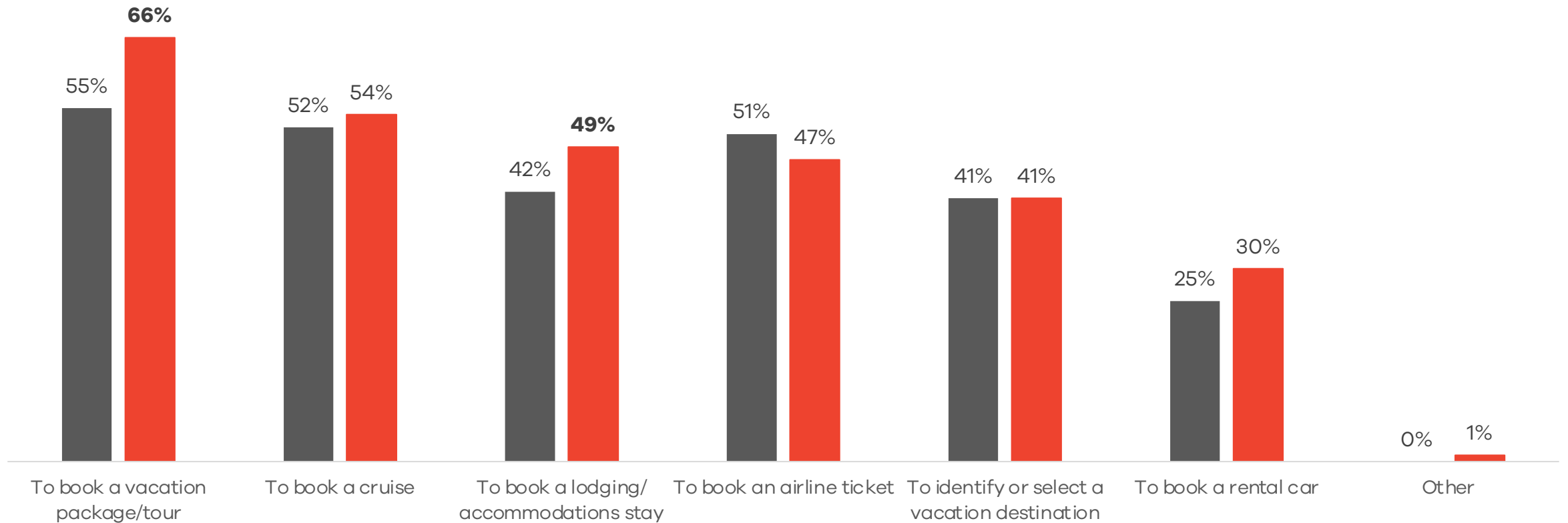
of likely Hawai'i visitors plan to use the services of a travel advisor during the next 2 years



Those Likely To Visit Hawai'i Are Using Travel Advisors to Book Vacation Packages and Tours, Lodging, Cruises, and Accommodation.

Services Likely to Use a Traditional Travel Agent to Book

■ 2023 ■ 2024



Travel Advisors

Data in bold indicates a significant difference from Summer 2023.

Base: Plan to use a traditional travel agent & Likely Hawai'i Visitor (n=411)

Source: MMGY Global's 2024 *Portrait of American Travelers*® "Summer Edition"

Likely Hawai'i Visitors Are Using Travel Advisors To Ensure Peace of Mind That What They're Booking Is The Experience They Get

Reasons to Use a Traditional Travel Agent	2023	2024
To have peace of mind that what I'm booking is the experience I expect it will be	46%	55%
To take the time and hassle out of researching and booking travel	50%	50%
To get the best prices for a vacation	52%	48%
To gain access to experiences I can't get on my own	42%	48%
They provide help if things go wrong	50%	44%
To get recommendations on the hottest/trending places to visit	39%	41%
Other	1%	3%

Data in bold indicates a significant difference from Summer 2023.

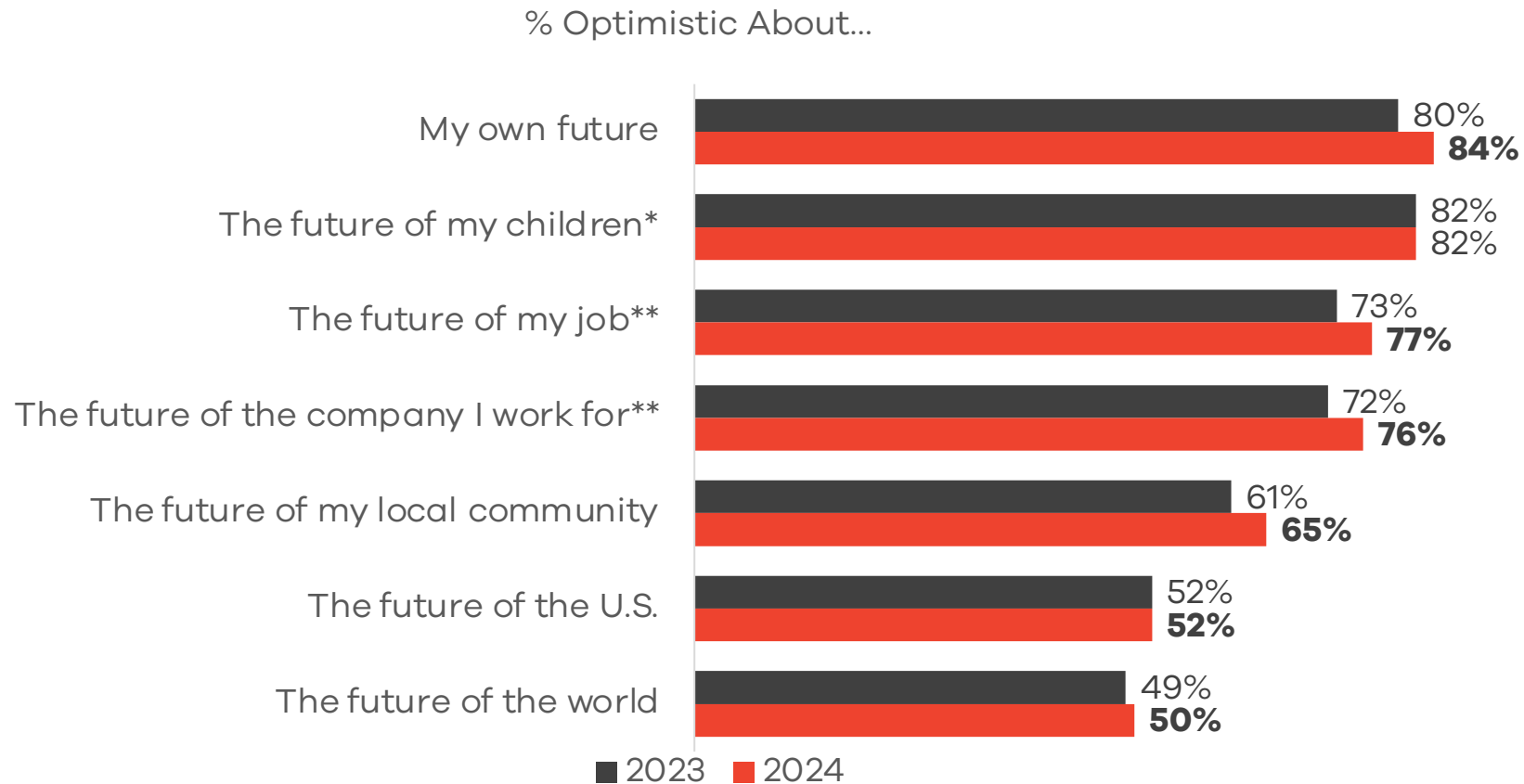
/ Compared to last year, significantly more Likely Hawai'i Visitors plan to use the services of a travel advisor to gain access to experiences they can't get on their own, they are using travel agents to provide help if things go wrong to a significantly lesser extent



Summer Module

Traveler Perspectives

Likely Hawai'i Visitors Are Feeling Optimistic About Their Own Future and the Future of Their Children But Are Less Optimistic About the Future of the Country and the World.



* Among those with children

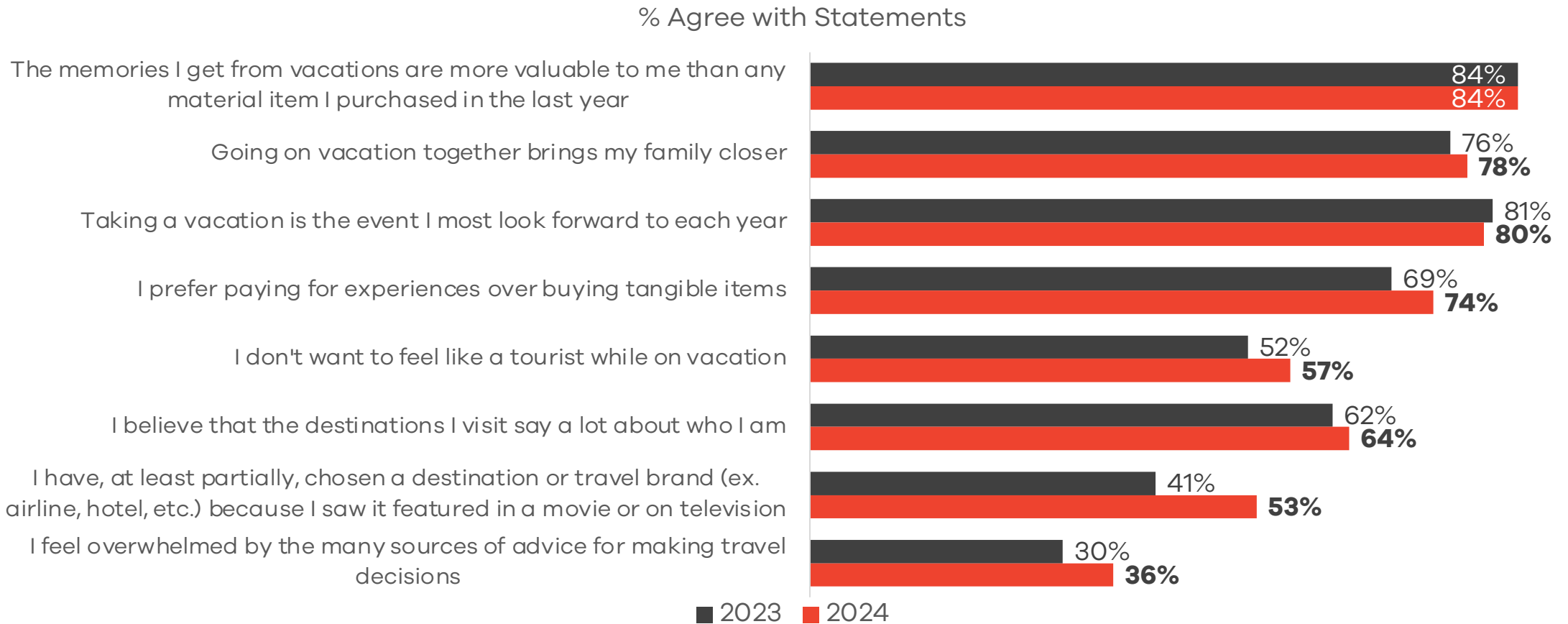
** Among those who are employed

Data in bold indicates a significant difference from Summer 2023.

Base: Likely Hawai'i Visitors (n=841)

Source: MMGY Global's 2024 *Portrait of American Travelers*® "Summer Edition"

Likely Hawai'i Visitors Are Looking For Experiences and To Make Memories When on Vacation.



Traveler Perspectives

Data in bold indicates a significant difference from Summer 2023.

Base: Likely Hawai'i Visitors (n=841)

Source: MMGY Global's 2024 *Portrait of American Travelers*® "Summer Edition"

Luxury Travel

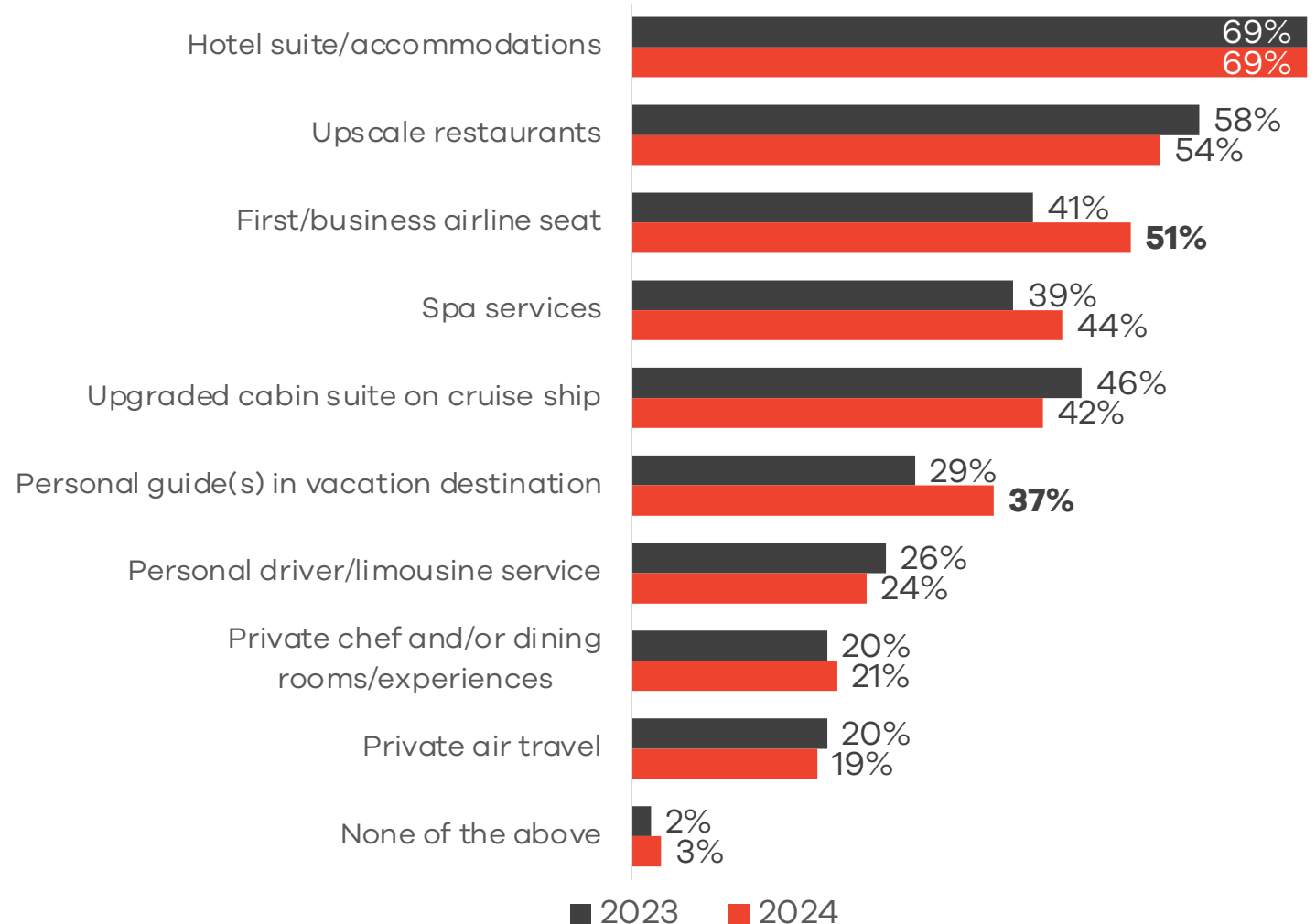
72%
2024

Agree: **I enjoy being treated like a VIP.**
(vs. 68% in 2023)

49%
2024

Agree: **I consider myself to be a luxury traveler.**
(vs. 45% in 2023)

Luxury Travel Features Willing To Pay More For
(Among those who consider themselves luxury travelers)



Traveler Perspectives

Data in bold indicates a significant difference from Summer 2023.

Base: Likely Hawai'i Visitors (n=841)

Source: MMGY Global's 2024 *Portrait of American Travelers*® "Summer Edition"



Summer Module

Cannabis Tourism

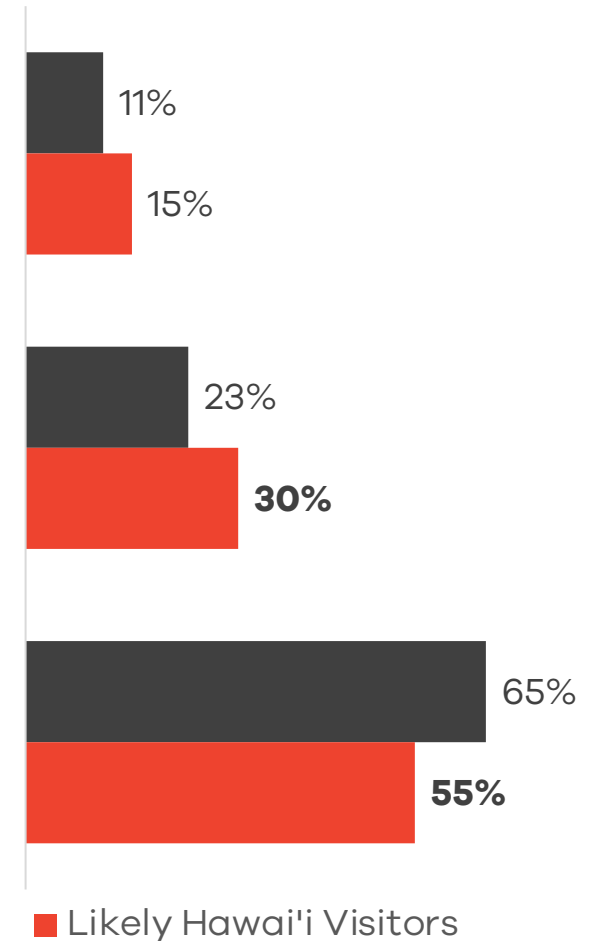


Interest in Cannabis-Related Activities While Traveling

Cannabis is part of my recreational lifestyle. I consume it in some form at least once a month, and I am interested in cannabis experiences while on vacation.

I am not a regular consumer of cannabis, but I am open to cannabis-related experiences while traveling.

I am not interested in cannabis related experiences while traveling.

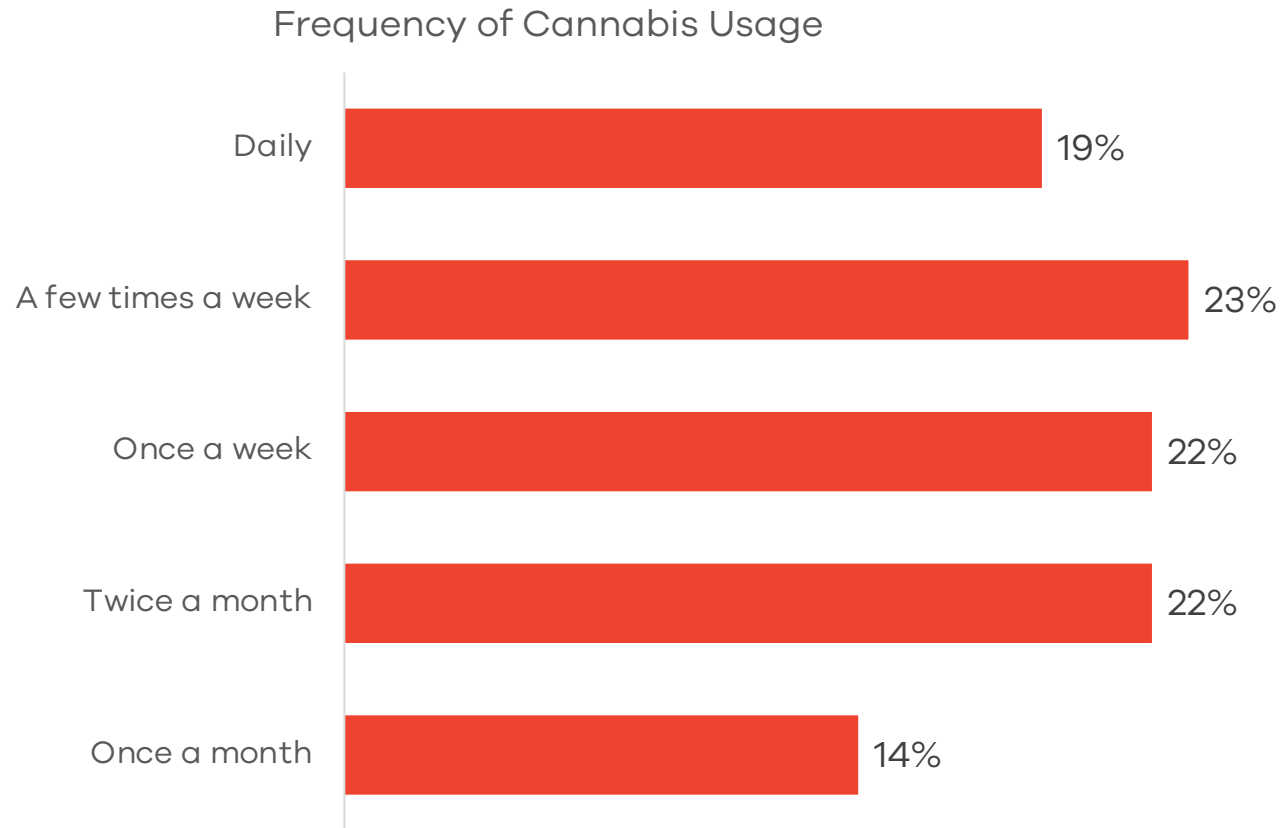


Data in bold indicates a significant difference from U.S. Leisure Travelers.

Base: U.S. Leisure Travelers (n=3,591); Likely Hawai'i Visitors (n=841)

Source: MMGY Global's 2024 *Portrait of American Travelers*® "Summer 52 Edition"

Among Likely Visitors Who Agree Cannabis is a Part of Their Recreational Lifestyle, a Fifth Consume It Daily, Followed By a Quarter Who Consume It Once a Week or Every Other Week.

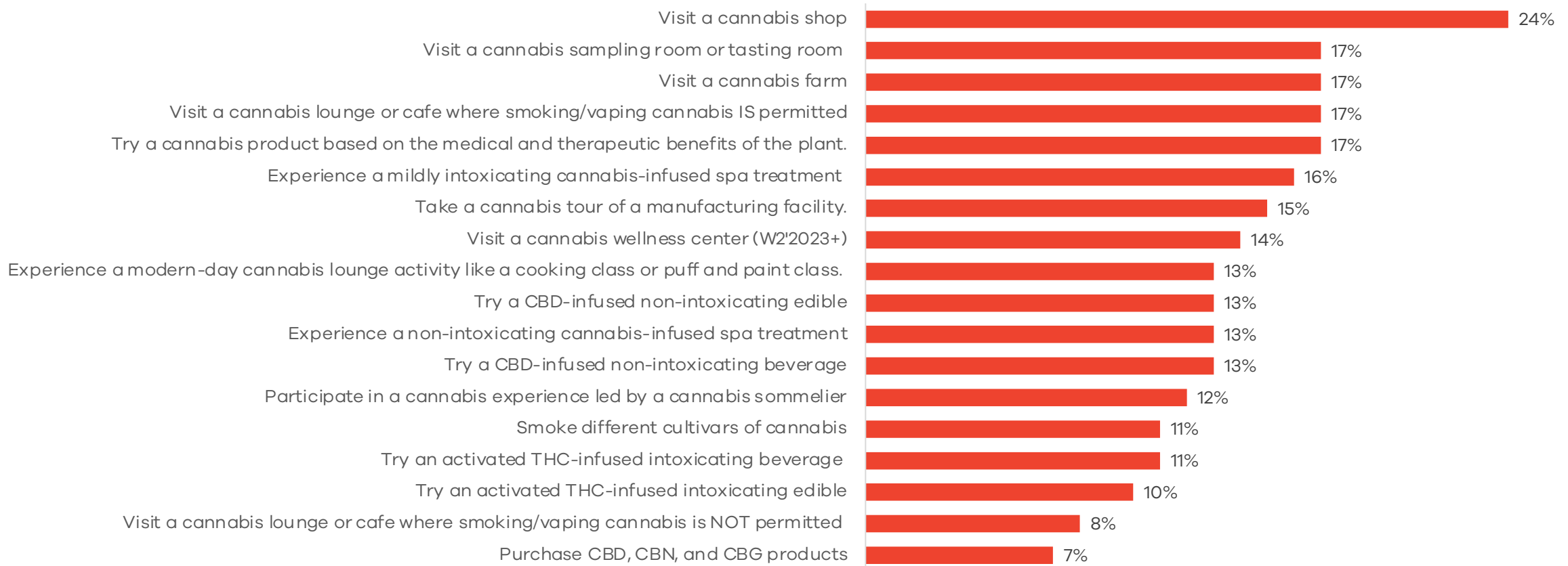


Base: Likely Hawai'i Visitors who agree that cannabis is a part of their recreational lifestyle (n=233)

Source: MMGY Global's 2024 *Portrait of American Travelers*® "Summer Edition"

Visiting a Cannabis Shop Is the Most Popular Cannabis Vacation Activity of Interest For Likely Hawai'i Visitors.

Interest in Cannabis Activities



Cannabis Tourism

A Fifth of Likely Hawai'i Visitors Are Interested in Experiencing Mild Intoxicating Effects While on Vacation.

Interest in Cannabis Effects	Likely Hawai'i Visitors
I am interested in feeling mild intoxicating cannabis effects while on vacation.	19%
I am interested in experiencing cannabis effects that complement and enhance food experiences like fine-dining or sampling local signature dishes.	16%
I am interested in experiencing cannabis effects that complement and enhance art experiences like mural walks, theater, and live music performances.	17%
I am interested in feeling medium intoxicating cannabis effects while on vacation.	16%
I am interested in experiencing cannabis effects that complement and enhance nature experiences like a hike in the redwoods or a day at the beach.	16%
I am interested in feeling strong intoxicating cannabis effects while on vacation.	13%
I am only interested in non-intoxicating cannabis and hemp activities and experiences while on vacation.	13%
All of the above.	3%

2 in 10 Likely Hawai'i Visitors are Interested in Hotels That Have Dedicated Areas for Smoking Cannabis

Interest in Cannabis-Friendly Hotels	Likely Hawai'i Visitors
Hotels that have knowledgeable staff that are capable of answering basic questions and offering cannabis experience recommendations in the destination.	21%
Hotels that have dedicated areas for smoking cannabis.	15%
Hotels that offer cannabis-infused spa treatments.	15%
Hotels that permit non-smoking cannabis consumption. (i.e. beverages, edibles, topicals).	14%
Hotels that have cannabis, hemp, and CBD-related experiences on-site. (i.e. 420 Happy Hour, CBD Beverage Happy Hour).	13%
Hotels that offer cannabis delivery as a curated service amenity.	13%
Hotels that offer non-intoxicating hemp-derived products	12%



Vacation Motivators and Activities

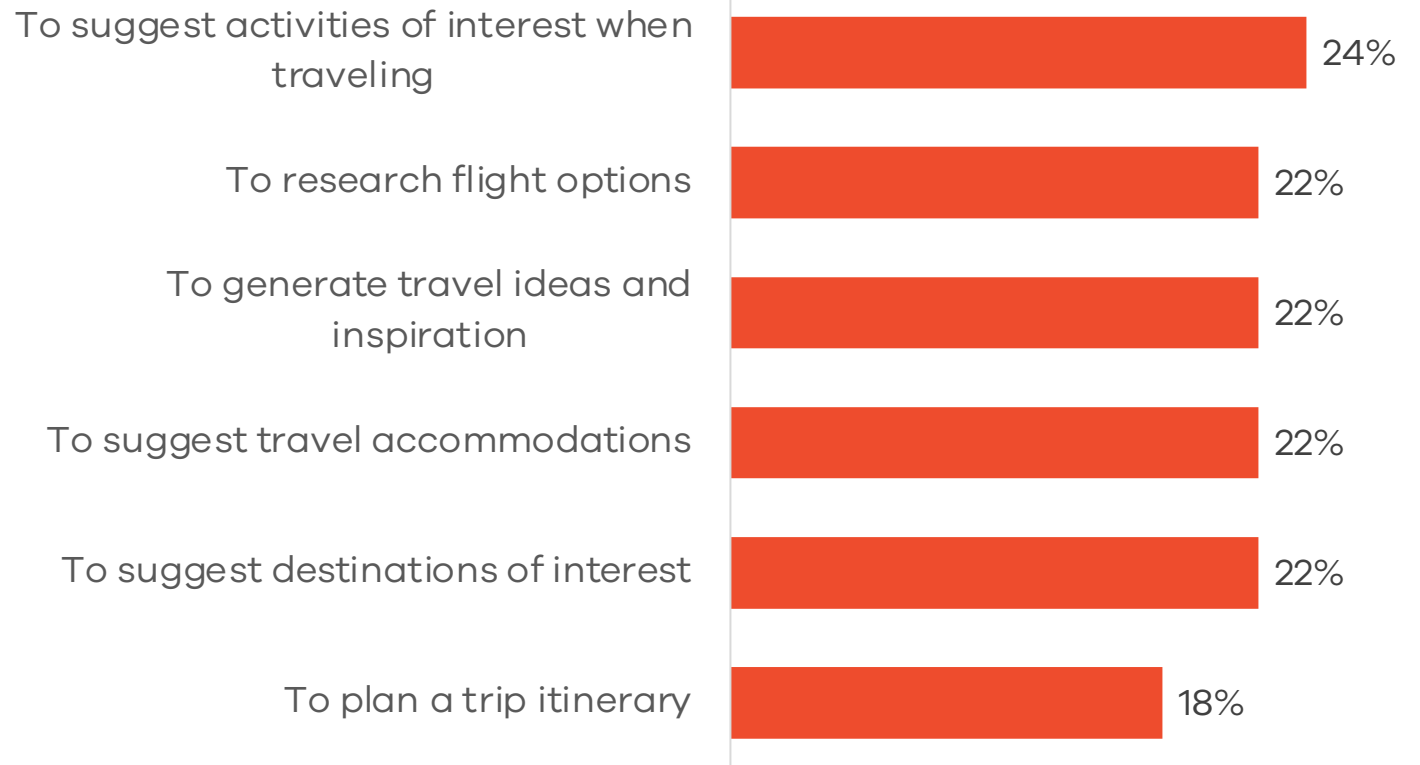
The Most Popular Uses of AI When Travel Planning For Likely Hawai'i Visitors Are To Suggest Activities of Interest and Research Flight Options.

46%

of Likely Hawai'i Visitors have used ChatGPT or another AI tool for travel planning.

(vs. 28% of US Leisure Travelers)

AI Use for Travel Planning
(Among those who have used AI for travel planning)

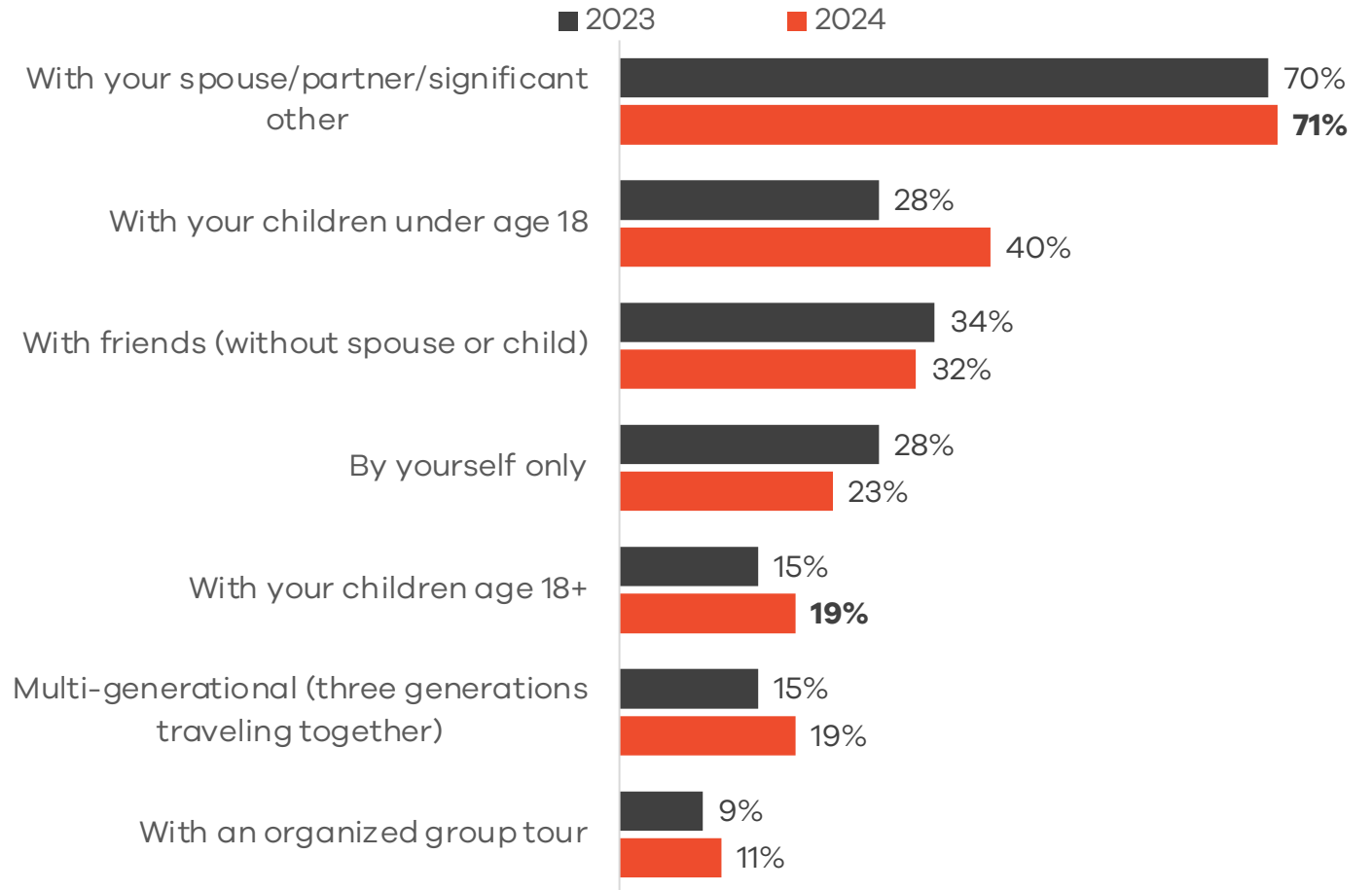


Vacation Motivators & Activities



Traveling With a Children Under 18 is up Significantly From Last Year for Likely Hawai'i Visitors.

Travel Party During the Next Six Months



Vacation Motivators & Activities

Data in bold indicates a significant difference from Summer 2023.

Base: Likely Hawai'i Visitors who intend to travel during the next six months (n=783)

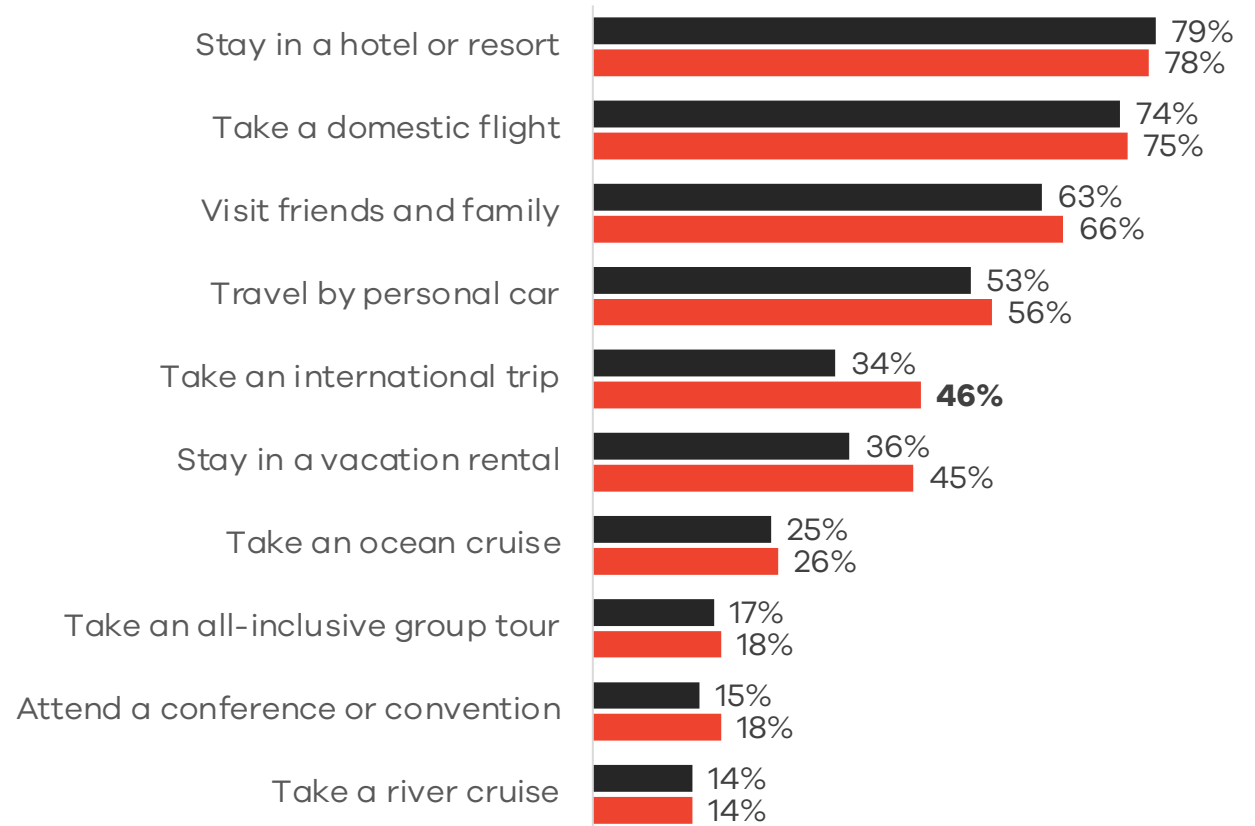
Source: MMGY Global's 2024 *Portrait of American Travelers*® "Summer Edition"



Compared to 2023, Significantly More Likely Hawai'i Visitors Expect to Take an International Trip in the Next 6 Months.

Travel Expectations in the Next 6 Months

■ 2023 ■ 2024



Vacation Motivators & Activities

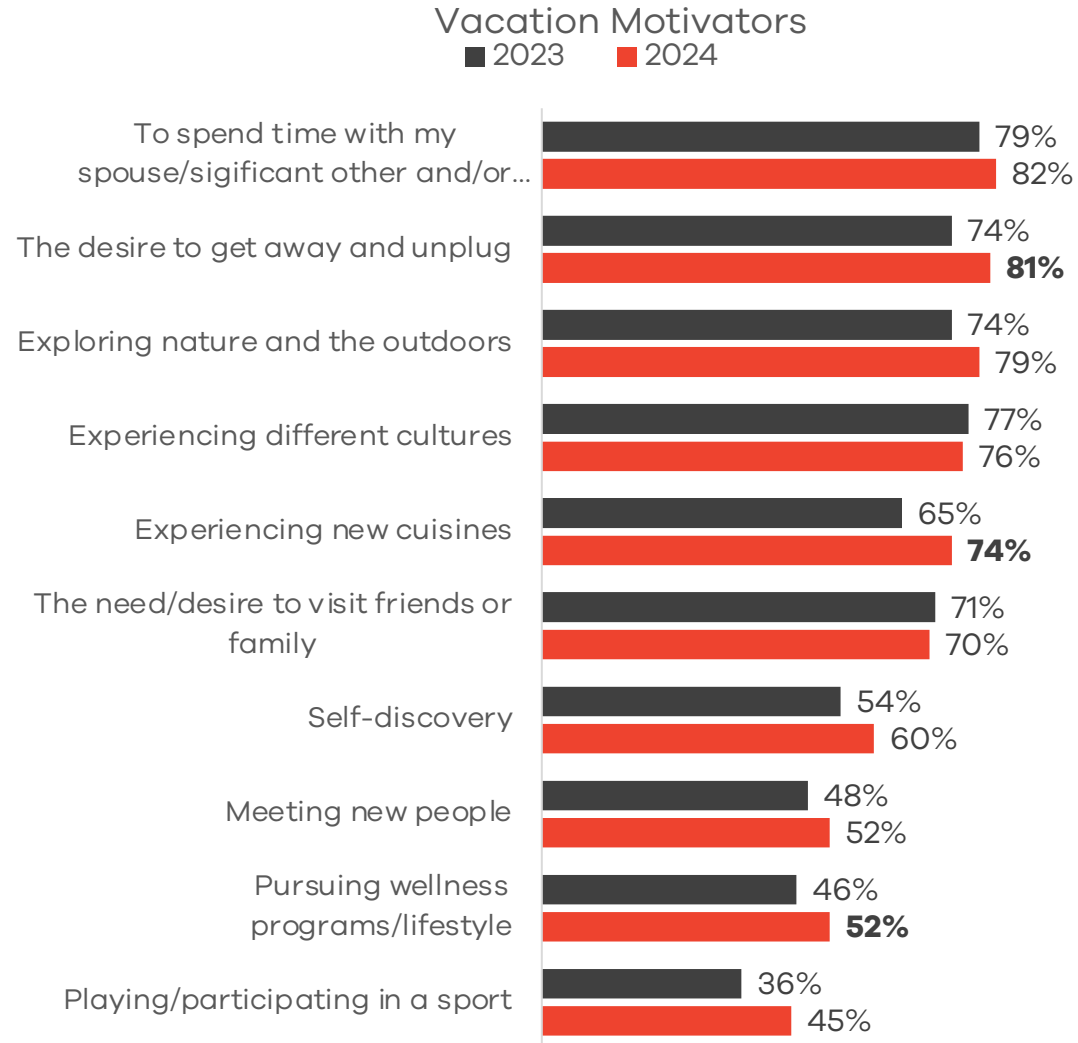
Data in bold indicates a significant difference from Summer 2023.

Base: Likely Hawai'i Visitors who intend to travel during the next six months (n=783)

Source: MMGY Global's 2024 *Portrait of American Travelers*® "Summer Edition"



More Likely Hawai'i Visitors Are Motivated to Travel to Unplug and Experience Different Cuisines Compared to Last Year.



Vacation Motivators & Activities

Data in bold indicates a significant difference from Summer 2023.

Base: Likely Hawai'i Visitors (n=841)

Source: MMGY Global's 2024 *Portrait of American Travelers*® "Summer Edition"

What Destination Attributes Influence Choice of Destination?

Influential When Selecting a Destination	2023	2024
Beautiful scenery	70%	76%
Safety	65%	66%
Food and drink scene	61%	65%
Outdoor/nature activities	52%	61%
Historical significance of a destination	48%	54%
Focus on family activities	32%	41%
A sense of tradition (place family has traditionally visited)	33%	33%
The ethnic diversity and multicultural population of a destination	30%	33%
Music scene	27%	32%
Nightlife/bars	25%	29%
The destination's reputation for environmental responsibility	20%	24%
The destination's commitment to social justice and equality	19%	19%
LGBTQ+ travel offerings	10%	8%

Data in bold indicates a significant difference from Spring 2023.

- / Beautiful scenery is the top attribute Likely Hawai'i Visitors look for when selecting a destination.
- / Beautiful scenery, outdoor/nature activities, Destinations of Historical Significance, Family Activities and the Music Scene of a destination all increased in influence compared to Spring 2023.

Activities of Interest on Vacation

	2023	2024
Beach experiences	66%	62%
Visiting a state or national park	56%	57%
Shopping	50%	54%
Historical sites	48%	53%
Visiting a theme or amusement park	36%	48%
Visiting a museum	43%	46%
Visiting a zoo or aquarium	36%	44%
Visiting notable architectural sites	34%	43%
Food tours	N/A	42%
Hiking/climbing/biking/other outdoor adventures	39%	40%
Attending a concert/music festival	32%	40%
Dining cruise	39%	38%
Adventure travel (safaris, mountain climbing, trekking vacations, etc.)	29%	38%
Spa Services (massages, facials, etc.)	32%	36%
Guided tours with access to local experiences that are otherwise inaccessible	32%	35%
Cooking, wine or cocktail class (W3'2023+)	N/A	35%
Attending a sporting event	32%	34%
Dinner theatre	23%	33%
Nightlife	26%	33%
Water sports (waterskiing, boating/rafting)	28%	32%
Camping	21%	31%
Casino gambling	25%	29%
Attending performing arts events	20%	28%
Exploring family's ancestry/past on a heritage vacation	24%	26%
Film/art festivals	19%	25%
Snow skiing/snowboarding	13%	21%
Scuba diving	13%	19%
Playing golf	16%	17%
Surfing	9%	14%

- / Beach experiences, shopping, visiting a state/national park and historical sites are the top activities of interest for Likely Hawai'i Visitors.
- / Shopping, Historical Sites, Visiting a Theme Park a Zoo and Notable Architectural Sites increased significantly compared to last year.

Data in bold indicates a significant difference from Spring 2023.

Base: Likely Hawai'i Visitors (n=841)

Source: MMGY Global's 2024 *Portrait of American Travelers*® "Summer Edition"



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THANK YOU