



2025

SPRING EDITION



**MM
GY** **PORTRAIT**
of American Travelers™



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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 4,502 U.S. adults in February 2025.

This report primarily focuses on active leisure travelers, defined as those who intend to take at least one overnight leisure trip during the next 12 months. There were a total of 4,038 active leisure travelers. 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 five generations of adults surveyed are defined below. Due to the small number of Silent/Gen I respondents, we did not include their individual results in this report.

The error interval of the statistical estimates appearing in this report (for n=4,038) is +/- 1.54% at the 95% level of confidence.

Generation	Age	% of Respondents
Gen Zers	18–28	17%
Millennials	29–44	27%
Gen Xers	45–60	25%
Boomers	61–79	28%
Silent/Gen I	80+	3%

Introduction

The 2025 *Portrait of American Travelers – Spring Edition* study explores the key trends influencing American travel decisions, with dedicated modules investigating the impact of sustainability in travel, to key sources of travel information and what accommodations are most popular. This report also provides an overall travel outlook, finding that American travelers are spending more and taking more trips than anytime in the past 5 years, before going on to investigate vacation motivators and top activities of interest and international travel intentions.

By analyzing these insights, this study provides a detailed snapshot of the current state of American travel and offers valuable takeaways for destinations, travel providers and industry stakeholders seeking to navigate this evolving landscape. Understanding and anticipating these emerging trends is key to meeting the needs of today's travelers and anticipating the future of the industry.





Key Insights

Key Insights

Hawai'i Tourism Proprietary Questions

- Prices of airfare, vacation packages and hotels are the top 3 reasons preventing Hawaii prospects from visiting. The long flight to Hawaii is the top non-financial reason for not visiting, although this has decreased in importance significantly since 2023, indicating that more travelers are prepared to embark on longer flights to visit Hawaii.
- Hawaii remains the 4th most popular destination visited in the past 3 years among prospects, with only Florida, California and New York more popular over this period. Interest in Europe and Nevada also increased significantly over this period. Additionally, Hawaii prospects are twice as likely to visit the state before any other destination compared to the average American leisure traveler.
- The Maui fires are not having a significant impact on visitors to Hawaii, with only 11% of U.S. leisure travelers now unlikely to visit in the coming two years due to the fires.

Traveler Outlook

- Hawaii prospects are planning to take 0.5 more trips and spend \$900 more over the coming 12 months compared to Spring 2024. These prospects are typically wealthy, younger than the average US traveler and prepared to spend almost \$2,000 more on their leisure travel in the next 12 months.
- Despite this high-spending, Hawaii prospects place significant priority on the availability of great travel deals, which greatly impact these prospects more than any other factor. Travel deals are closely followed by inflationary pressures in their impact, with ease of access to a destination also an important consideration.

Key Insights

Where People Want to Visit

- California, Florida and New York were the top destination states for Hawaii prospects, with Florida, Maine, Montana and Maryland all seeing significant drops in interest from Spring 2024.
- Europe, Canada and The Caribbean maintained their position as the most popular states to visit in 2025, with Europe and Asia both seeing significant increases in interest compared to Spring 2024.

Sustainability in Travel

- Hawaii prospects are more environmentally conscious than the average U.S. leisure traveler, with 9 in 10 (88%) prospects willing to change their travel behaviour to reduce environmental impact compared to just 81% of U.S. travelers.
- This environmental consciousness is particularly prevalent in prospect's willingness to pay additional fees or taxes to reduce their impact on the environment, something which the average U.S. leisure traveler is strongly averse to.

- Furthermore, this willingness to pay more is encapsulated by 1 in 3 (34%) prospects willing to pay 6-24% more to patronize environmentally responsible travel service providers, compared to just 1 in 4 (25%) of U.S. leisure travelers who are willing to pay the same.

Sources of Travel Information

- Reviews, tips and recommendations from friends and family are increasingly important to Hawaii prospects, particularly when it comes to finding vacation ideas and inspiration.
- Travel review websites are also essential resources in the ideas and inspiration phase, as well as for comparing features and booking. Once prospects have figured out where they want to go, and how much they are willing to pay, they turn to travel service provider websites and online travel agencies for booking their vacations.
- Increasing traffic to websites along this purchase path can be achieved by incorporating more pricing for accommodations, restaurants and attractions, as well as photos of the destination, both of which are highly valued by Hawaii prospects.

Key Insights

Accommodations

- Resorts, short-term rentals and boutique hotels are significantly more popular among Hawaii prospects compared to U.S. leisure travelers, aligning with prospect's higher vacation spend and desire for luxurious vacations.
- The popularity of short-term rentals is also driven by their ability to cater to larger groups, a factor very important to Hawaii prospects, who also like the idea of vacationing in a home away from home.
- Furthermore, traditional hotels are less popular than resorts among Hawaii prospects, marking a significant difference from U.S. leisure travelers. This indicates that prospects enjoy the comprehensive experience of resorts, with extensive on-site amenities and better catering for larger groups, something which we have seen is of significant importance to prospects.

Vacation Motivators and Activities

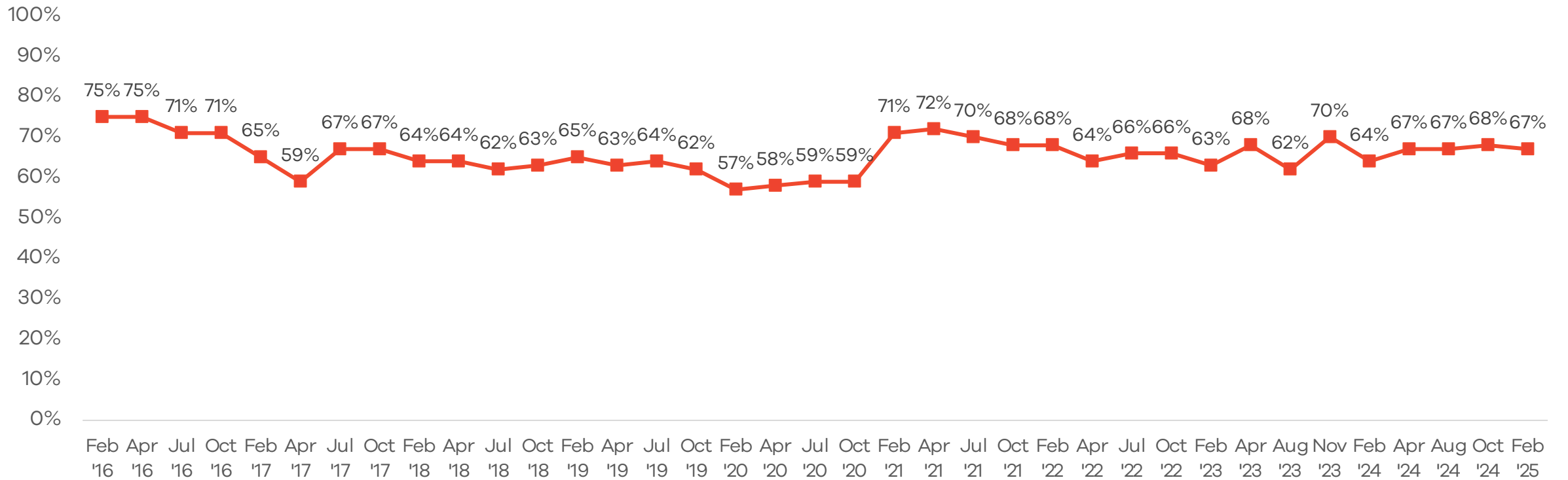
- Hawaii prospects are tech-savvy, with 50% of these prospects quickly taking up ChatGPT or other AI tools, compared to just 34% of U.S. leisure travelers. They most commonly use these tools to generate travel ideas and inspiration, suggest activities of interest and plan a trip itinerary.
- Prospects are most inspired to select a destination based on beautiful scenery, outdoor/nature activities and the food and drink scene. Outdoor/nature activities have seen the most significant increase in importance across all destination attributes from 2023, highlighting the growing importance that Hawaii prospects place on immersing themselves in nature and going to show that Hawaii's fantastic nature has a huge appeal among these travelers.
- Wildfires, particularly affecting prospects traveling to California, are a more significant issue for Hawaii prospects compared to the average U.S. leisure traveler, with over 1 in 5 prospects altering travel plans due to these natural disasters.

Hawaii Tourism Proprietary Questions



Interest in visiting Hawaii among U.S. leisure travelers has increased 3% from Spring 2024.

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



Hawai'i Tourism Proprietary Questions

Base: U.S. Leisure Travelers (n=4,038)

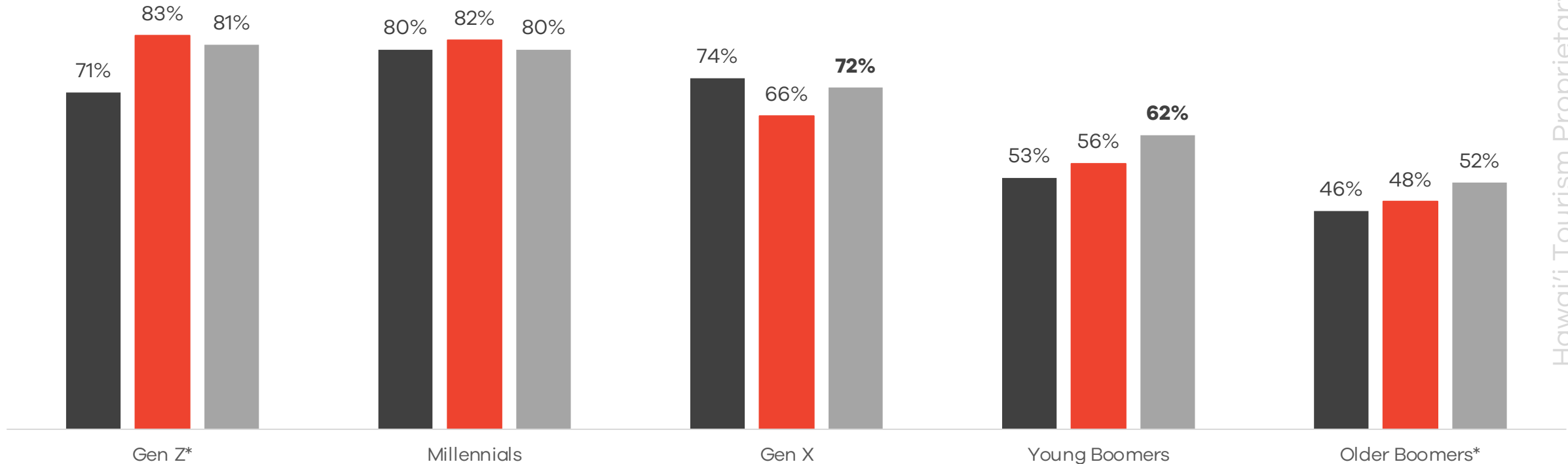
Source: MMGY's 2025 *Portrait of American Travelers*® "Spring Edition"



Gen Xers and Young Boomers are significantly more interested in visiting Hawaii compared to Spring 2024.

Interest in Visiting Hawai'i
By Generation

■ Q1 '23 ■ Q1 '24 ■ Q1 '25



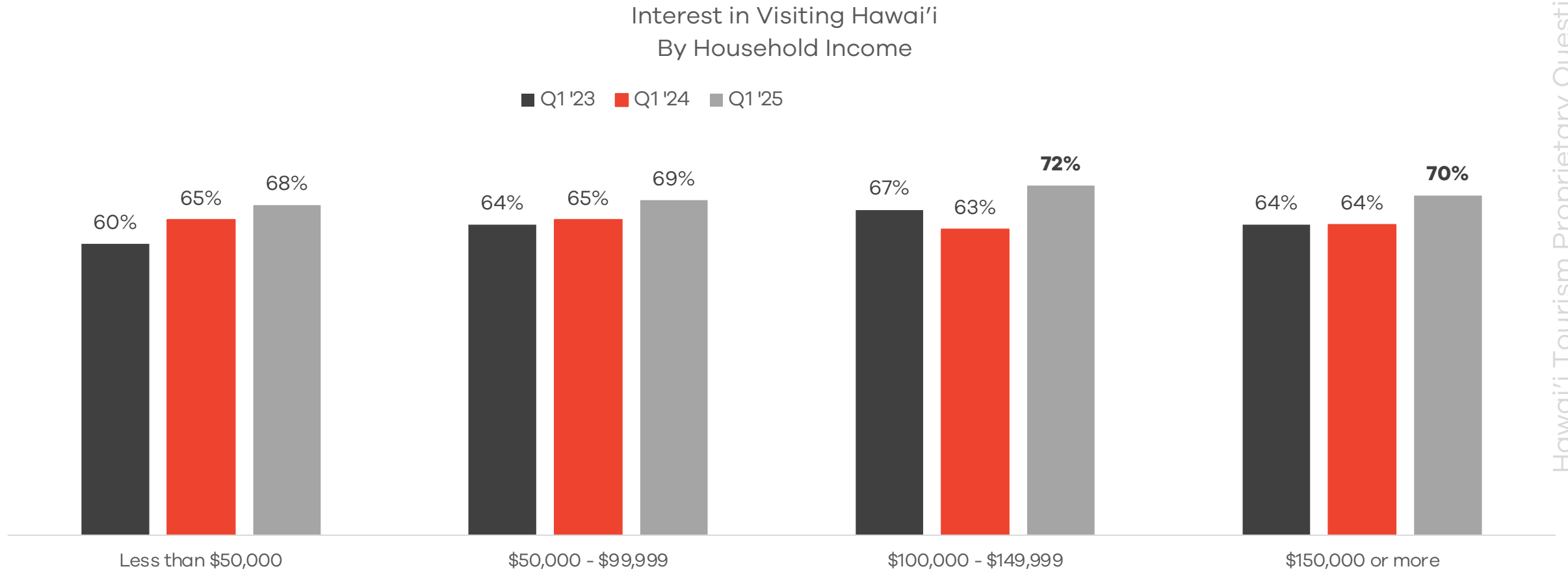
* Small sample size – Interpret with caution.

Data in bold indicates a significant difference from Spring 2023.

Base: Air Travelers (n=2,575)

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

Hawaii has increased its appeal among wealthy air travelers from Spring 2024.



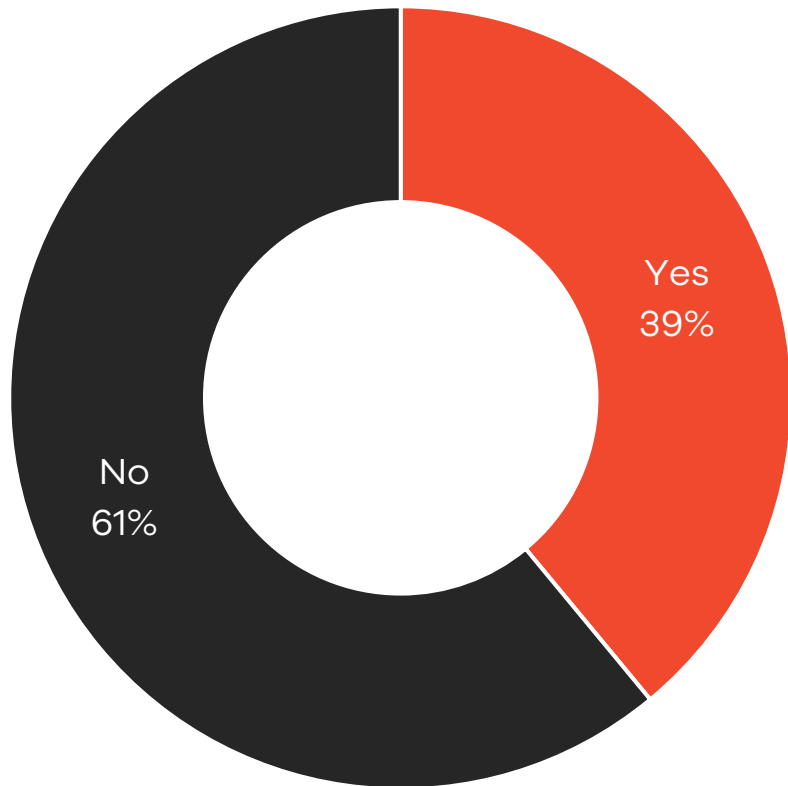
Data in bold indicates a significant difference from Spring 2023.

Base: Air Travelers (n=2,575)

Source: MMGY's 2025 *Portrait of American Travelers*® "Spring Edition"

High prices are the primary reasons for not visiting Hawaii, with leisure travelers also concerned about the time it takes to reach the destination.

Considered Visiting Hawaii But Changed Their Mind



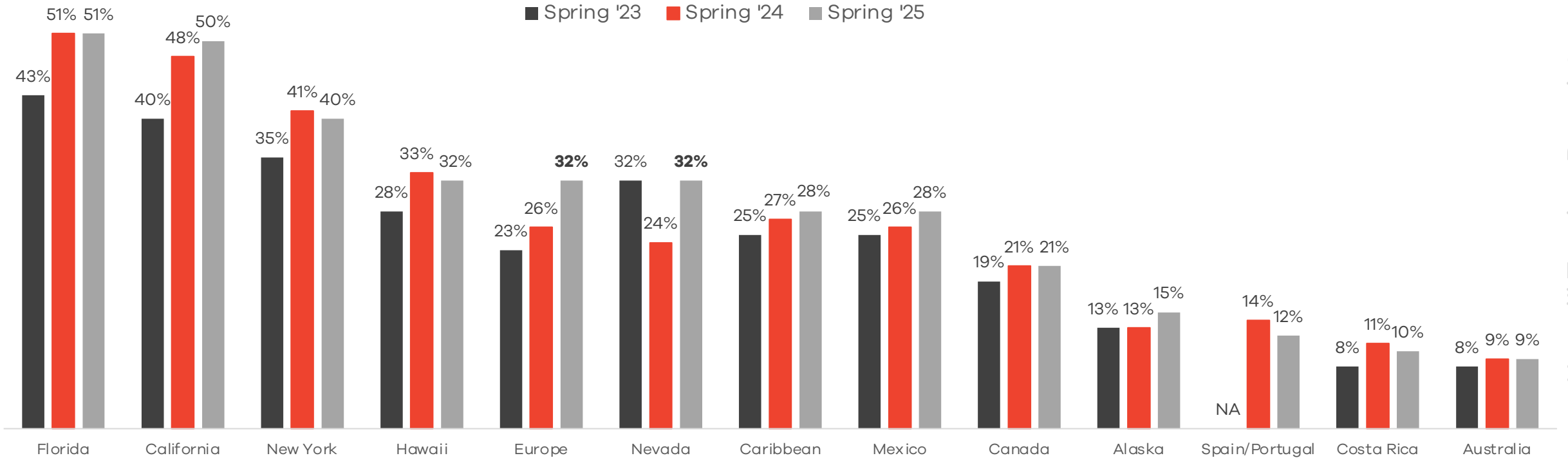
Reasons For Not Visiting Hawaii – Among U.S. Leisure Travelers Who Changed Their Mind	Spring '23	Spring '24	Spring '25
Price of airfare	35%	40%	37%
Price of a vacation package	33%	34%	33%
Price of the hotel	29%	29%	32%
The flight to Hawai'i is too long	26%	23%	20%
Better value at another destination	19%	21%	20%
Not enough time to travel to Hawai'i	15%	14%	13%
Already been and want to try another destination	17%	12%	11%
Not sure which island(s) in Hawai'i to visit	10%	10%	9%
Hawai'i is too crowded	13%	10%	9%
Potential of Hurricanes and tropical storms hitting Hawai'i	7%	9%	10%
Heard/read that Hawai'i residents don't want visitors	NA	8%	11%
Higher quality entertainment at other destinations	NA	8%	8%
Availability of rental car inventory	NA	8%	7%
Accommodations were not available	8%	7%	8%
Hawai'i is not unique enough	8%	6%	7%
I still do not feel comfortable visiting Hawai'i since the Maui wildfires	NA	5%	4%
Not enough dining options at price point	NA	5%	4%
Hawai'i is not exotic enough	5%	4%	4%

Base: Air Travelers who didn't visit Hawaii (n=619) & U.S. Leisure Travelers Who Changed Their Mind (n=1,495)

Source: MMGY's 2025 *Portrait of American Travelers*® "Spring Edition"

Past Visitation To Hawai'i Increased From Spring 2023, As Did Past Visitation to Several Other Destinations.

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



Hawai'i Tourism Proprietary Questions

Data in bold indicates a significant difference from Spring 2024.

Base: Air travelers who are likely to visit Hawaii in the next 2 years (n=1,097)

Source: MMGY's 2025 *Portrait of American Travelers*® "Spring Edition"



Air travelers likely to visit Hawaii are two times as likely to book their next trip to Hawaii compared to the average U.S. leisure traveler.

Destinations Most Likely to Book First in the Next Two Years	U.S. Leisure Travelers	Air Travelers likely to visit Hawaii
Hawaii	12%	24%
Another U.S. state	41%	22%
Caribbean	13%	12%
Europe	15%	19%
Mexico	7%	7%
Asia	6%	11%
Oceania	2%	2%
Other	4%	2%

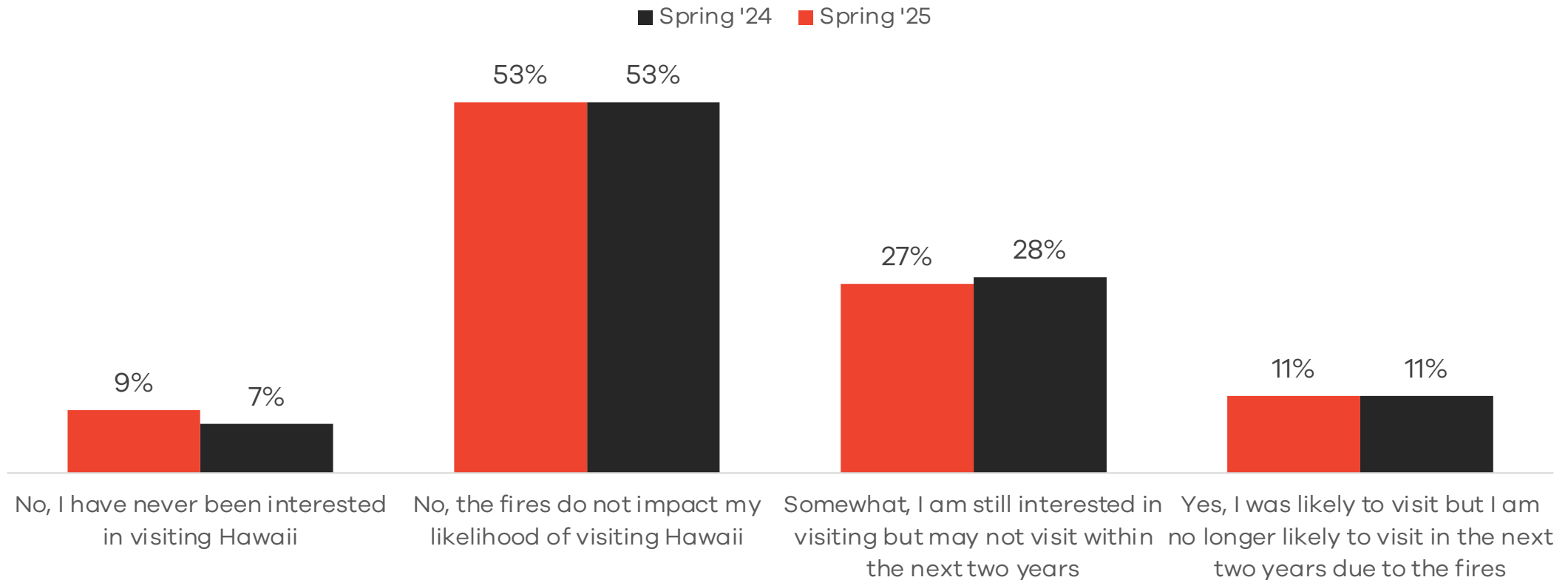
Data in bold indicates a significant difference from U.S. Leisure Travelers

Base: U.S. Leisure Travelers (n=4,162), Air travelers who are likely to visit Hawaii in the next 2 years (n=1,097)

Source: MMGY's 2025 *Portrait of American Travelers*® "Spring Edition"

Despite recent wildfires across the USA, knowledge of the Maui fires has not had a more significant impact compared to Spring 2024, with over half (53%) of American leisure travelers unaffected.

Does the knowledge of the Maui fires impact your likelihood of visiting Hawaii within the next two years?





The Hawaii Prospect

Self-Described Personas

	U.S. Leisure Travelers	Likely Hawaii Visitors
Beach lover	48%	55%
Foodie	44%	48%
Family traveler	38%	41%
World traveler	25%	38%
Pet lover	37%	36%
Travel bargain hunter	33%	36%
Outdoor adventurer	29%	35%
Sports fan/enthusiast	29%	34%
All-inclusive resort enthusiast	23%	33%
Luxury traveler	19%	32%
Theme park enthusiast	24%	31%
Cruise lover	24%	30%
Concert/festival enthusiast	25%	29%
Environmentally-conscious	20%	27%
Moderate (politically)	25%	26%
Wine enthusiast	19%	26%
Cocktail enthusiast	16%	23%
Liberal (politically)	19%	22%
Video game enthusiast	15%	20%
Conservative (politically)	21%	17%
Recreational cannabis user	12%	13%
Golf enthusiast	9%	13%
Social justice activist	8%	12%
Ski/snowboard enthusiast	6%	11%
Road warrior (business travel)	6%	8%

There are many more beach lovers, world travelers, outdoor adventurers and luxury travelers among likely Hawaii visitors.

This indicates that those looking to visit Hawaii have higher-incomes and prioritize natural, outdoor experiences when on vacation.

The Hawaii Prospect

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

Base: U.S. Leisure Travelers (n=4,162), Air travelers likely to visit Hawaii (n=1,097)

Source: MMGY's 2025 *Portrait of American Travelers*® "Spring Edition"



Demographics

	U.S. Leisure Travelers	Likely Hawaii Visitors
Male	48%	51%
Female	51%	48%
Other	1%	1%
Gen Zers	17%	18%
Millennials	27%	33%
Gen Xers	25%	27%
Young Boomers	16%	13%
Older Boomers	11%	8%
Have children under 18	29%	38%
White	75%	70%
Hispanic	17%	19%
African American/Black	14%	14%
Asian	8%	13%
Native American	2%	1%
Other	3%	4%

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

Base: U.S. respondents (n=4,502), Air travelers likely to visit Hawaii (n=1,097)

Source: MMGY's 2025 *Portrait of American Travelers*® "Spring Edition"

Demographics

	U.S. Leisure Travelers	Likely Hawaii Visitors
Under \$30,000	14%	5%*
\$30,000–\$49,999	12%	9%
\$50,000–\$74,999	18%	14%
\$75,000–\$99,999	11%	10%
\$100,000–\$124,999	11%	15%
\$125,000–\$149,999	8%	10%
\$150,000–\$249,999	19%	27%
\$250,000–\$499,999	6%	9%
\$500,000 or more	1%	2%
4 years or less of high school	38%	27%
1–3 years of college	26%	24%
4 years of college	22%	30%
Some graduate school	3%	3%
Graduate/professional degree	11%	16%

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

*Low sample size

Base: U.S. respondents (n=4,502), Air travelers likely to visit Hawaii (n=1,097)

Source: MMGY's 2025 *Portrait of American Travelers*® "Spring Edition"

Demographics

	U.S. Leisure Travelers	Likely Hawaii Visitors
South	39%	35%
West	24%	32%
Midwest	20%	16%
Northeast	17%	16%
Employed (full or part-time)	60%	78%
Retired	24%	11%
Temporarily unemployed	8%	4%
Homemaker (full-time)	6%	4%
Student	3%	2%
Married/living together	62%	67%
Never married	25%	23%
Divorced/separated/widowed	12%	9%

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

Base: U.S. respondents (n=4,502), Air travelers likely to visit Hawaii (n=1,097)

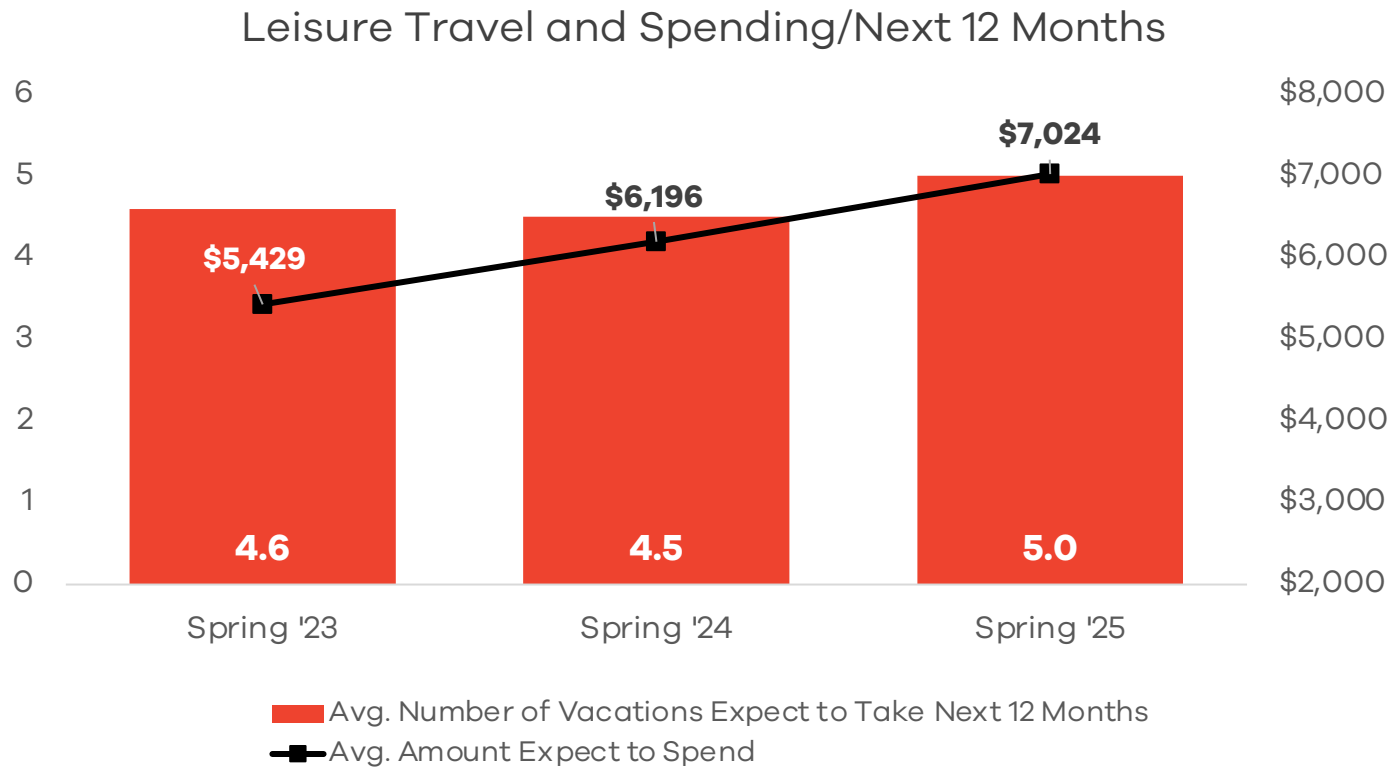
Source: MMGY's 2025 *Portrait of American Travelers*® "Spring Edition"



Travel Outlook Snapshot



Prospective Hawaii visitors are planning to take 0.5 more trips and spend \$900 more compared to Spring 2024.

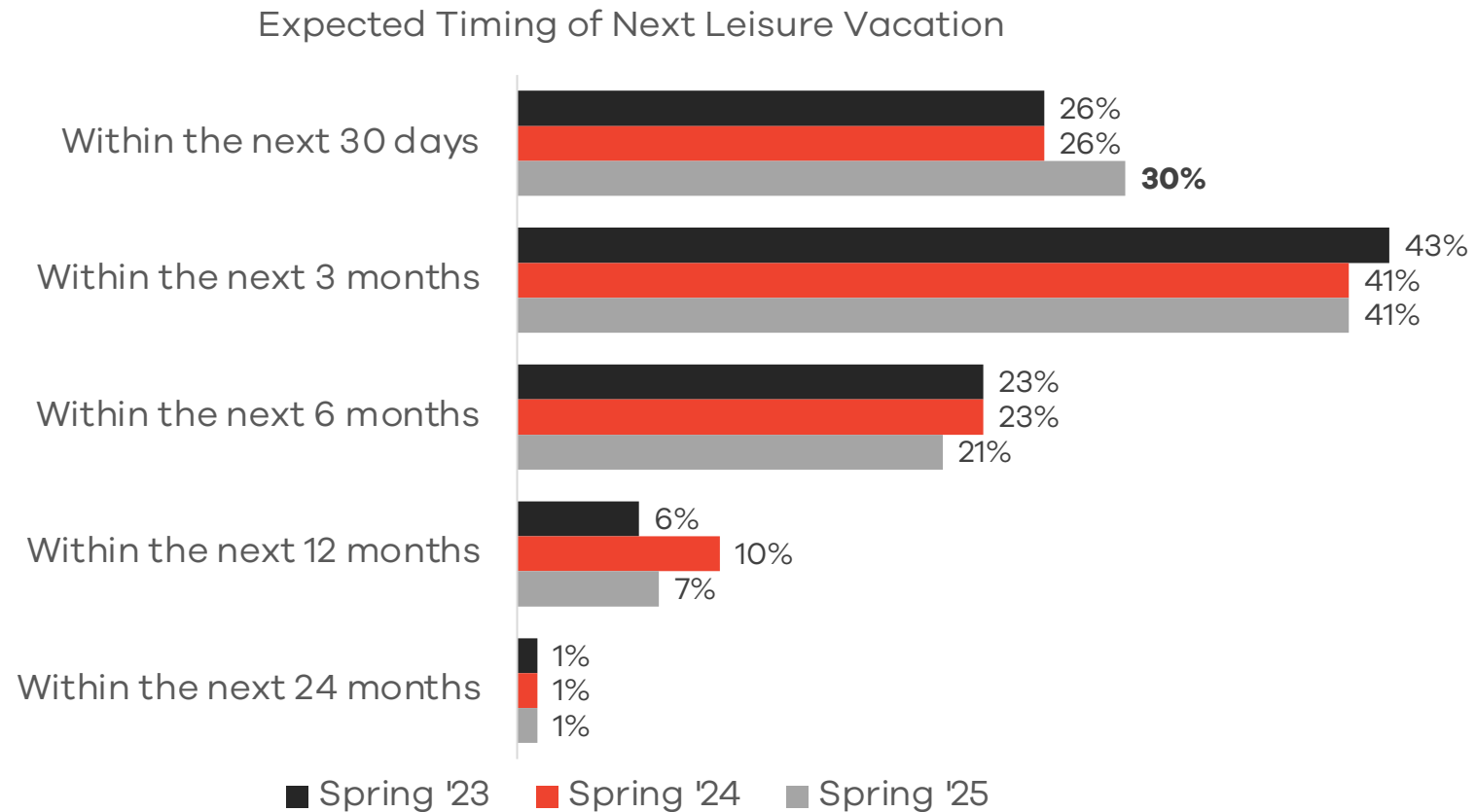


- / Recent air travelers who are likely to visit Hawaii are displaying very strong intentions to travel, planning to spend almost \$2,000 more and take 0.8 more leisure trips compared to the average U.S. leisure traveler.
- / Hawaii prospects tend to be younger and have higher-incomes than average, leading to frequent, luxurious vacations.

Base: Air travelers likely to visit Hawaii & planning to take a trip in the next 12 months (n=1,085)

Source: MMGY's 2025 *Portrait of American Travelers*® "Spring Edition"

More travelers are planning leisure vacations within the next 30 days compared to the previous two years.

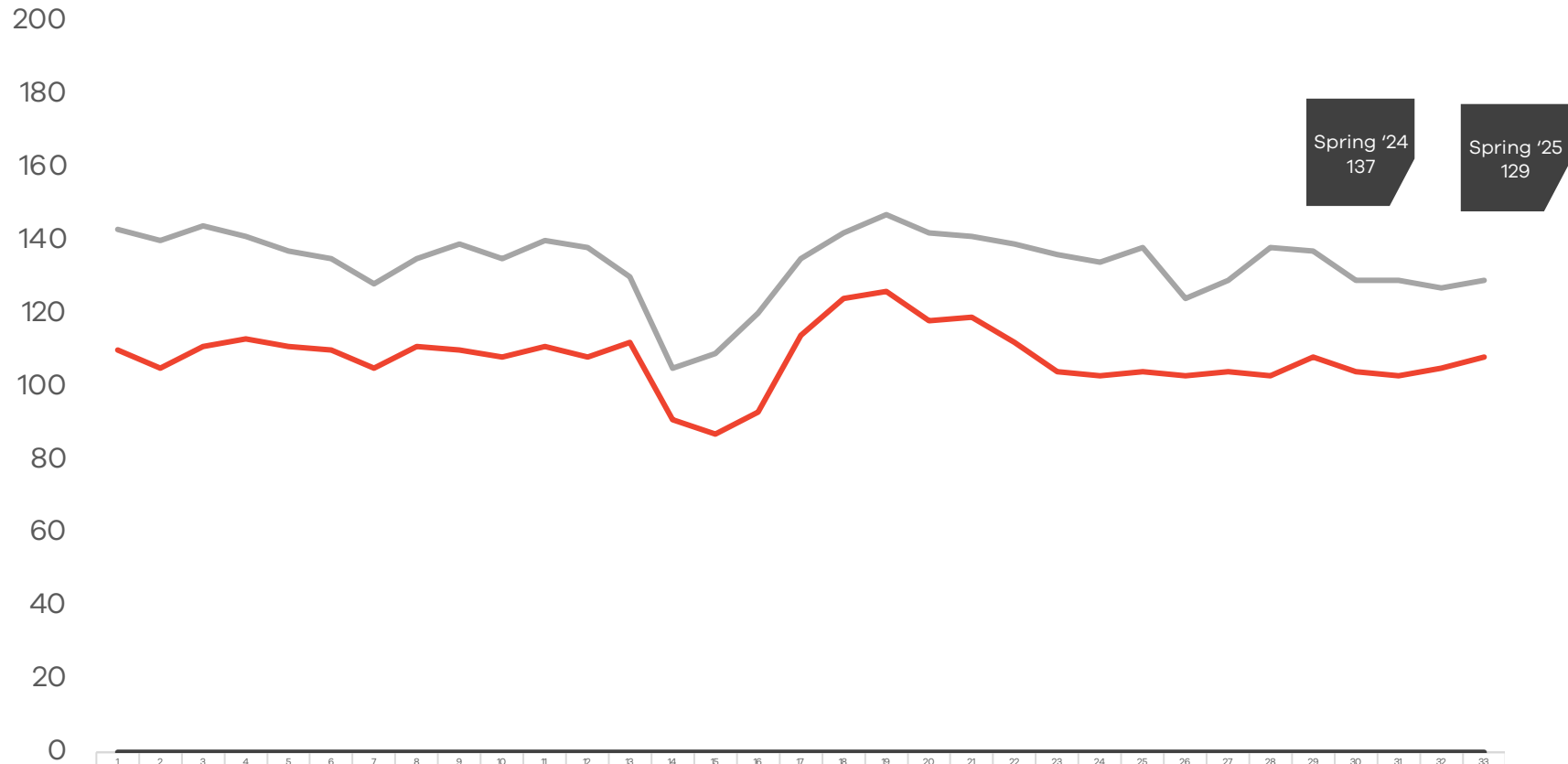


Data in bold indicates a significant difference from Spring 2024.

Base: Air travelers likely to visit Hawaii (n=1,097)

Source: MMGY's 2025 *Portrait of American Travelers*® "Spring Edition"

Overall Traveler Sentiment Score: Significant decrease from the high rate of Spring 2024.



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. Data has been shortened to 2017 onwards for clarity.

Traveler Sentiment Index™

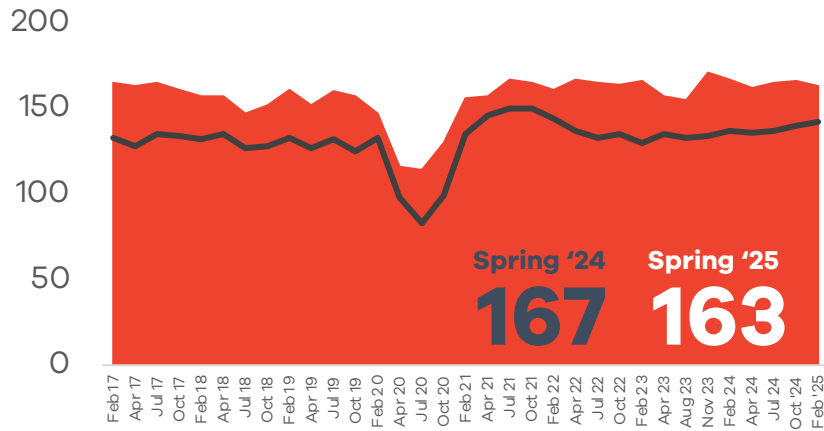
Base: U.S. Adults (n=4,501) & Air travelers likely to visit Hawaii (n=1,386)

Source: MMGY's 2025 *Portrait of American Travelers*® "Spring Edition"

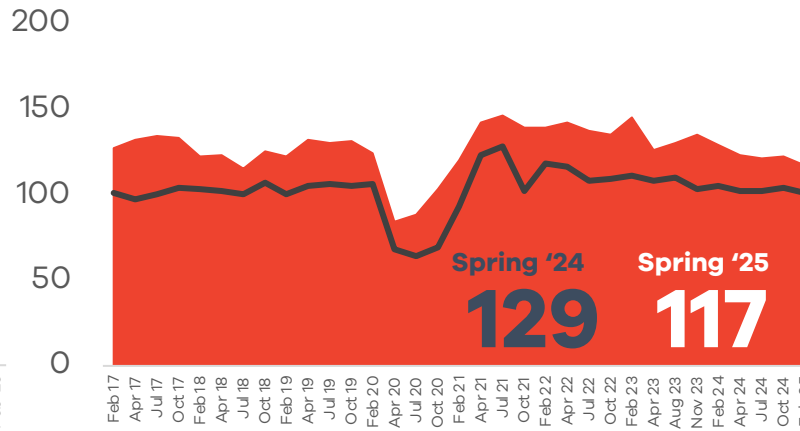


Traveler Sentiment for all categories decreased in comparison to Spring 2024, when sentiment was at an extremely high level.

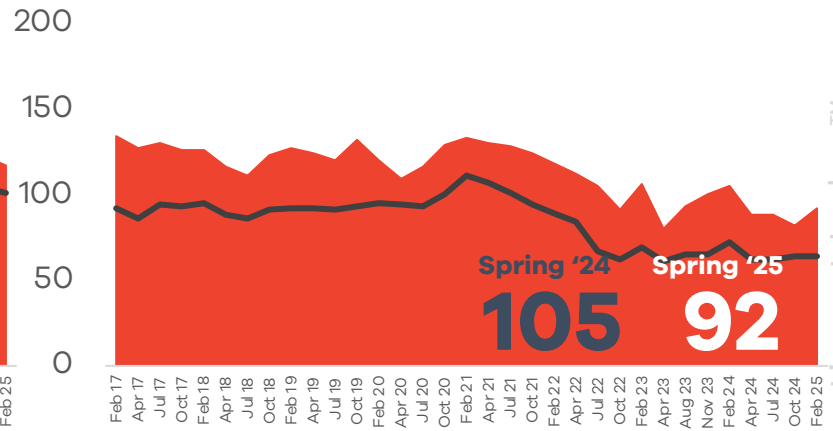
Interest in Travel



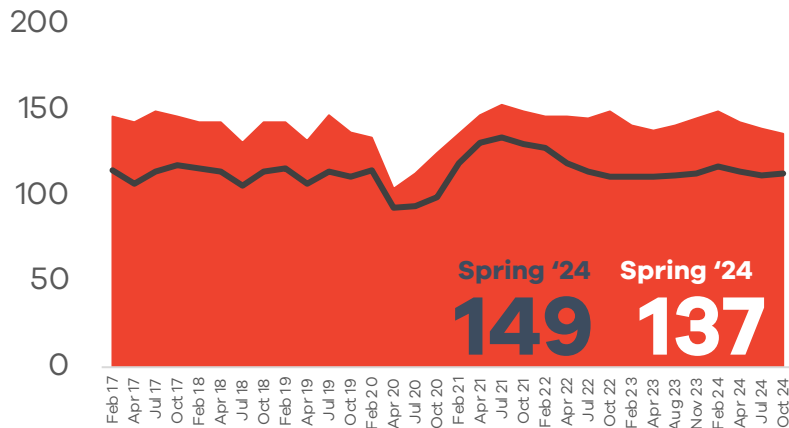
Perceived Safety of Travel



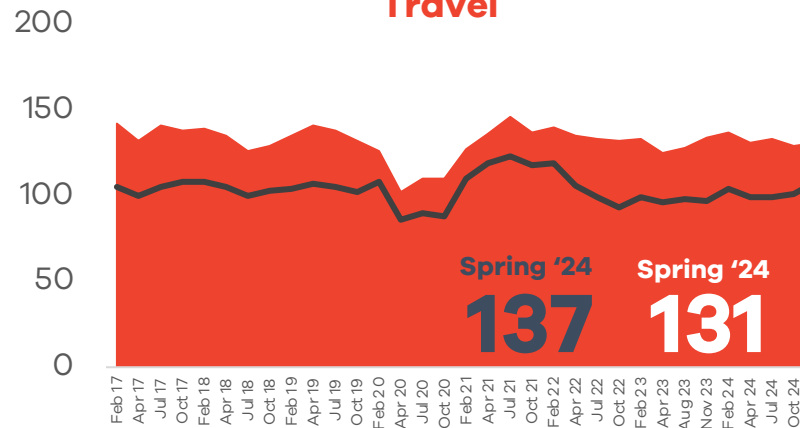
Affordability of Travel



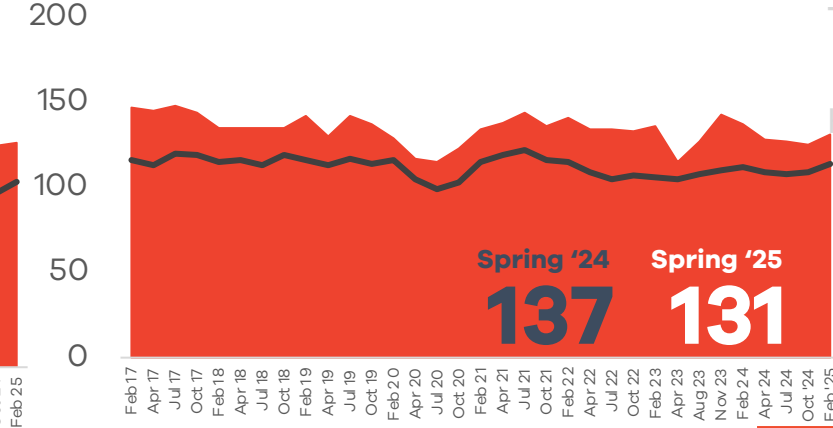
Time Available for Travel



Personal Finances Available for Travel



Quality of Service of Travel



Base: U.S. Adults (n=4,500) (Black line) & Air travelers likely to visit Hawaii (n=1,386) (Red fill)

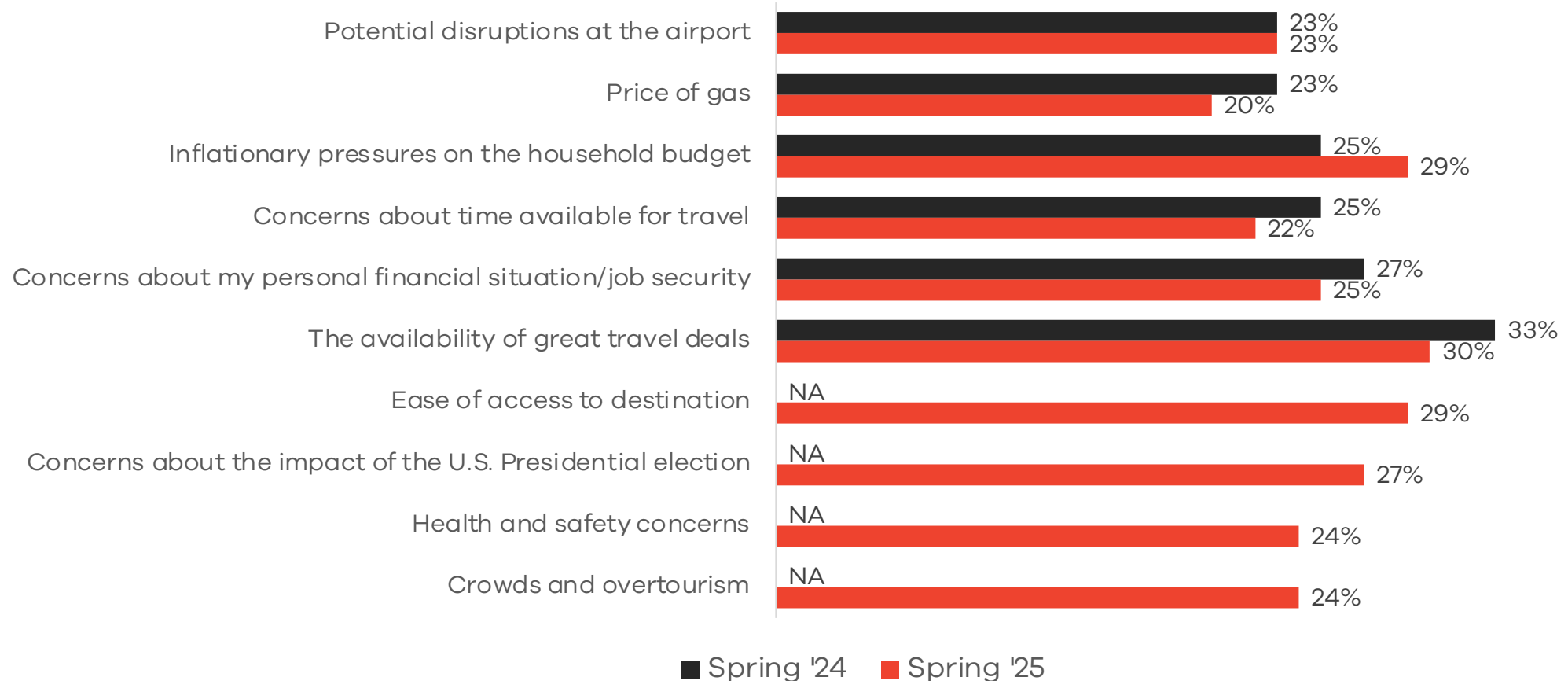
Source: MMGY's 2025 Portrait of American Travelers® "Spring Edition"



Traveler Sentiment Index™

The availability of great travel deals, ease of access to a destination and inflationary pressures have the most impact on Hawaii prospects.

% Who Are Extremely Impacted By...



NA = Not asked in 2024.

Base: Air travelers likely to visit Hawaii (n=1,097)

Source: MMGY's 2025 *Portrait of American Travelers*® "Spring Edition"



Where People Want to Visit



Florida, Maine, Montana and Maryland all saw significant drops in interest from Spring 2024.

Top 20 States of Interest (excluding Hawaii)	Spring '24	Spring '25
California	74%	73%
Florida	75%	69%
New York	69%	68%
Colorado	65%	66%
Alaska	67%	62%
Nevada	61%	59%
Arizona	62%	57%
Texas	60%	57%
Washington	55%	57%
North Carolina	49%	48%
Tennessee	47%	48%
Georgia	51%	47%
South Carolina	48%	47%
Oregon	43%	46%
Massachusetts	47%	45%
Maine	51%	44%
Louisiana	49%	43%
Montana	50%	43%
Pennsylvania	41%	41%
Maryland	48%	41%

Destinations of Interest

Base: Air travelers likely to visit Hawaii (n=1,097)

Source: MMGY's 2025 Portrait of American Travelers® "Spring Edition"

Data in bold indicates a significant difference from Spring 2024.



Destinations in Florida and California saw significant decreases in interest following recent natural disasters.

Top 20 destinations of interest	Spring '24	Spring '25
Island of Hawaii	75%	81%
Honolulu, HI	80%	81%
Maui, HI	78%	78%
Kaua'i, HI	75%	76%
Lanai, HI	70%	72%
Las Vegas, NV	69%	67%
New York City, NY	67%	66%
San Diego, CA	64%	65%
Florida Keys/Key West, FL	65%	63%
Orlando, FL	66%	61%
Miami, FL	64%	58%
Los Angeles, CA	61%	57%
New Orleans, LA	63%	56%
Niagara Falls, NY	57%	56%
San Francisco, CA	61%	55%
Washington, DC	57%	54%
Tampa/St. Petersburg/Clearwater, FL	56%	53%
Palm Beach, FL	58%	53%
Denver, CO	58%	51%
Nashville, TN	52%	48%

Base: Air travelers likely to visit Hawaii (n=1,097)

Data in bold indicates a significant difference from Spring 2024.

Source: MMGY's 2025 Portrait of American Travelers® "Spring Edition"

Destinations of Interest



Asia and Europe both saw significant increases in interest from air travelers likely to visit Hawaii.

International destinations of interest next two years	Spring '24	Spring '25
Europe	56%	62%
Canada	41%	39%
The Caribbean	44%	48%
Mexico	36%	38%
Asia	27%	36%
South America	24%	24%
Central America	22%	22%
Oceania	24%	25%
Africa	13%	16%
Middle East	10%	9%

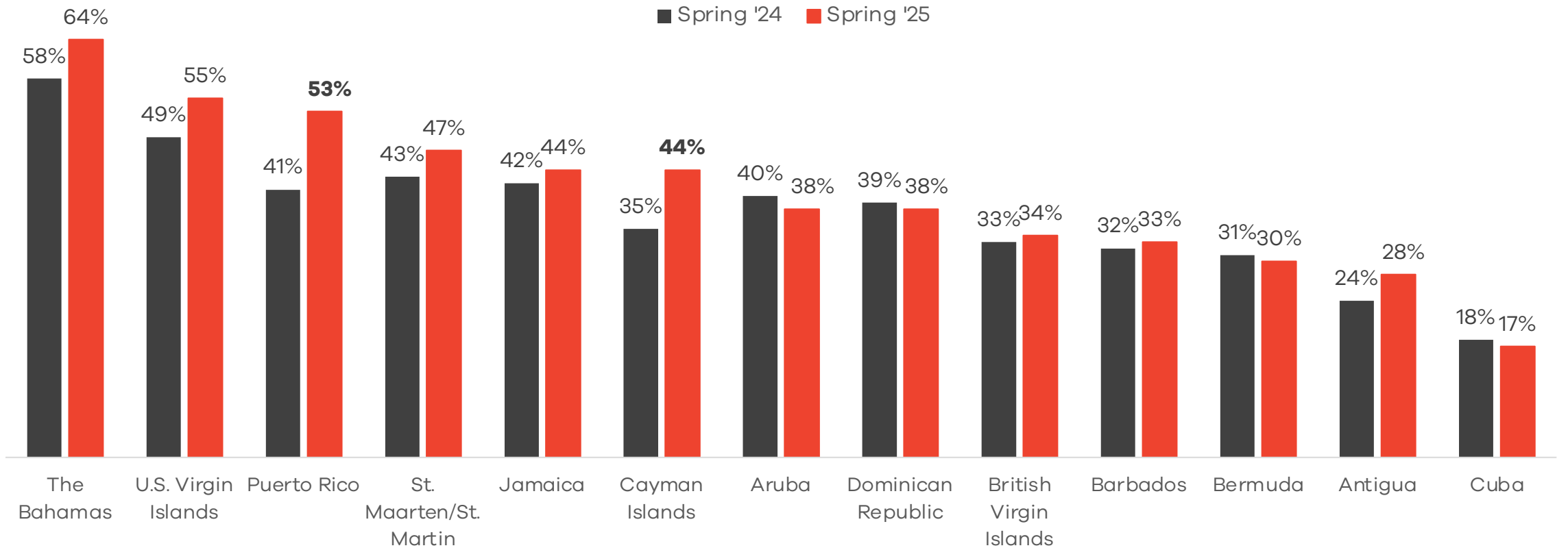
Data in bold indicates a significant difference from Spring 2024.

Destinations of Interest

Puerto Rico and the Cayman Islands both saw significant increases in interest from Hawaii prospects compared to Spring 2024.

Caribbean Destinations of Interest

■ Spring '24 ■ Spring '25



Destinations of Interest

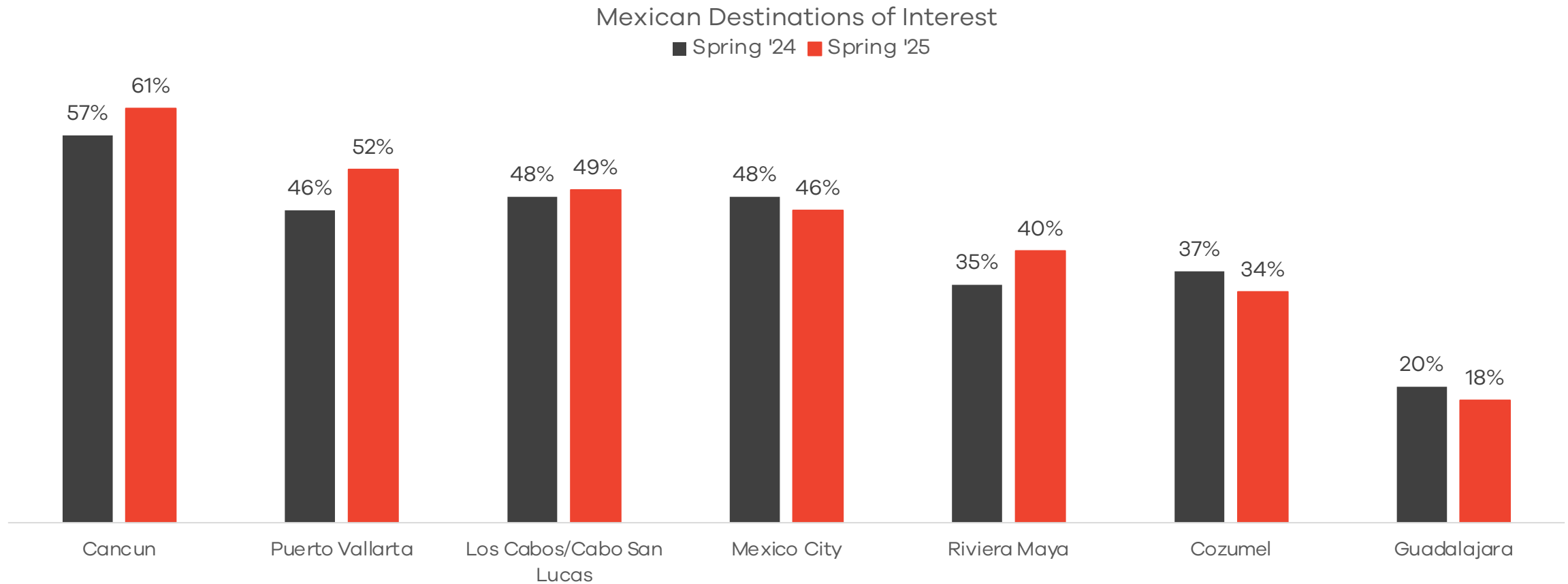
Data in bold indicates a significant difference from Spring 2024.

Base: Air travelers likely to visit Hawaii & Interested in Visiting The Caribbean (n=518)

Source: MMGY's 2025 Portrait of American Travelers® "Spring Edition"



Cancun and Puerto Vallarta were the top two Mexican destinations for Hawaii prospects, with both destinations seeing small increases in interest from Spring 2024.

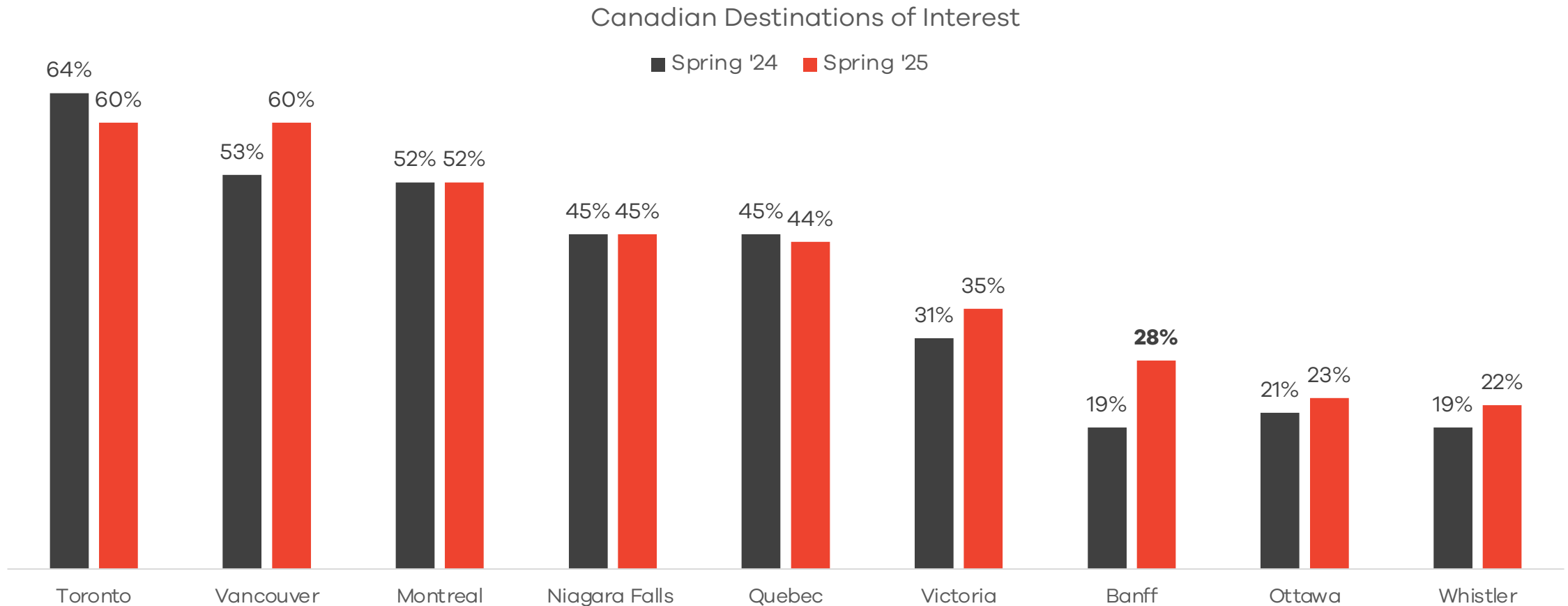


Data in bold indicates a significant difference from Spring 2024.

Base: Air travelers likely to visit Hawaii & Interested in Visiting Mexico (n=422)

Source: MMGY's 2025 Portrait of American Travelers® "Spring Edition"

Banff was the only destination to see a significant increase in interest, while Toronto, Vancouver and Montreal remained the top destinations from Spring 2024.



Destinations of Interest

Data in bold indicates a significant difference from Spring 2024.

Base: Air travelers likely to visit Hawaii & Interested in Visiting Canada (n=480)

Source: MMGY's 2025 Portrait of American Travelers® "Spring Edition"





Spring Module

**Sustainability
in Travel**

89%
2024

88%
2025

of Air travelers likely to visit Hawaii are willing to change travel behavior to reduce impact on the environment. (Compared to 81% of U.S. leisure travelers).

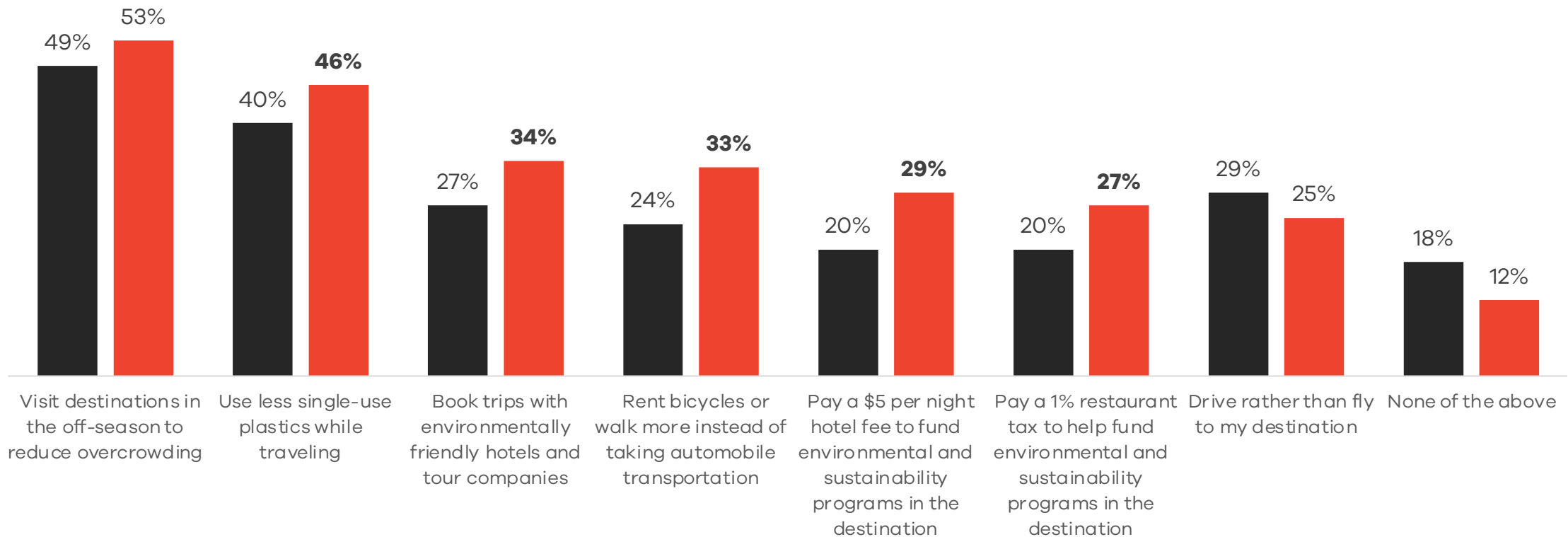
A Similar Percentage of Air travelers likely to visit Hawaii Indicate They Are Willing to Change Travel Behavior to Reduce Their Environmental Impact

Base: Air travelers likely to visit Hawaii (n=1,097)

Source: MMGY's 2025 Portrait of American Travelers® "Spring Edition"

Hawaii prospects are significantly more willing to pay for sustainability initiatives, including paying a \$5 per night fee, compared to the average U.S. leisure traveler.

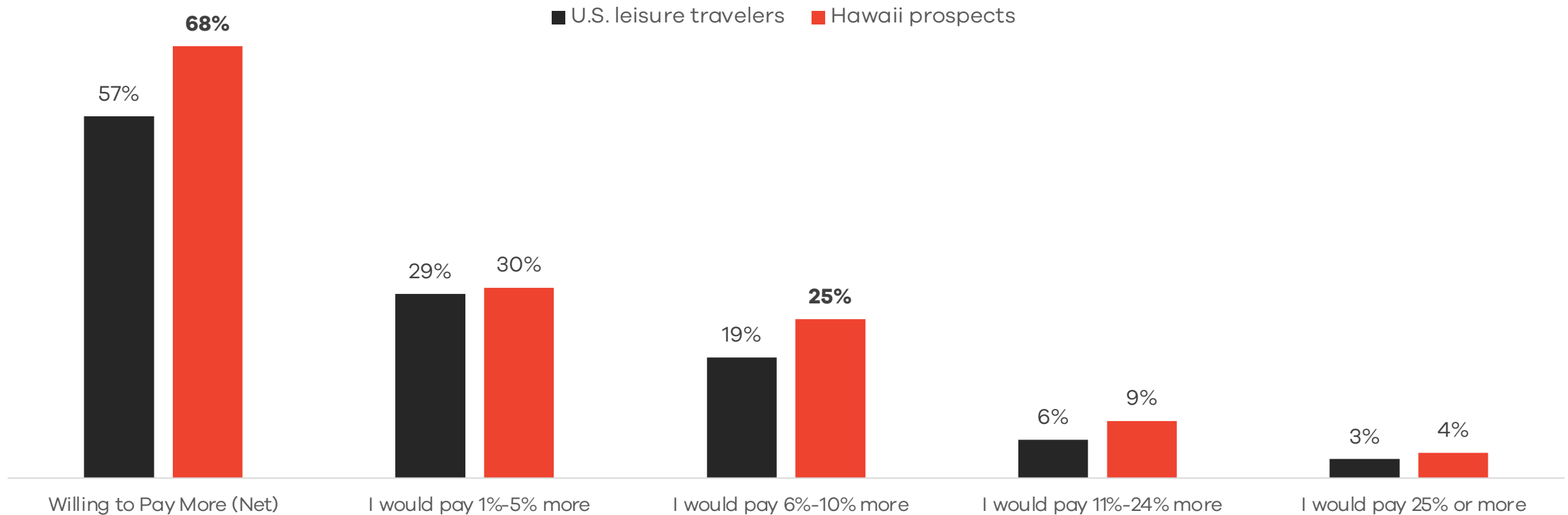
Actions Willing to Take to Reduce Impact on Environment
 ■ U.S. Leisure Travelers ■ Hawaii Prospects



Sustainability in Travel

Hawaii prospects are more likely to pay more to patronize environmentally conscious travel service providers, with significantly more willing to pay 6%-10% more compared to U.S. leisure travelers.

Percentage willing to pay more to patronize travel service providers who demonstrate environmental responsibility



Data in bold indicates a significant difference from Spring 2023.

Base: Air travelers likely to visit Hawaii (n=1,097)

Source: MMGY's 2025 Portrait of American Travelers® "Spring Edition"

Significantly less Hawaii prospects are “greatly impacted” by a travel service providers environmental efforts compared to the previous year.

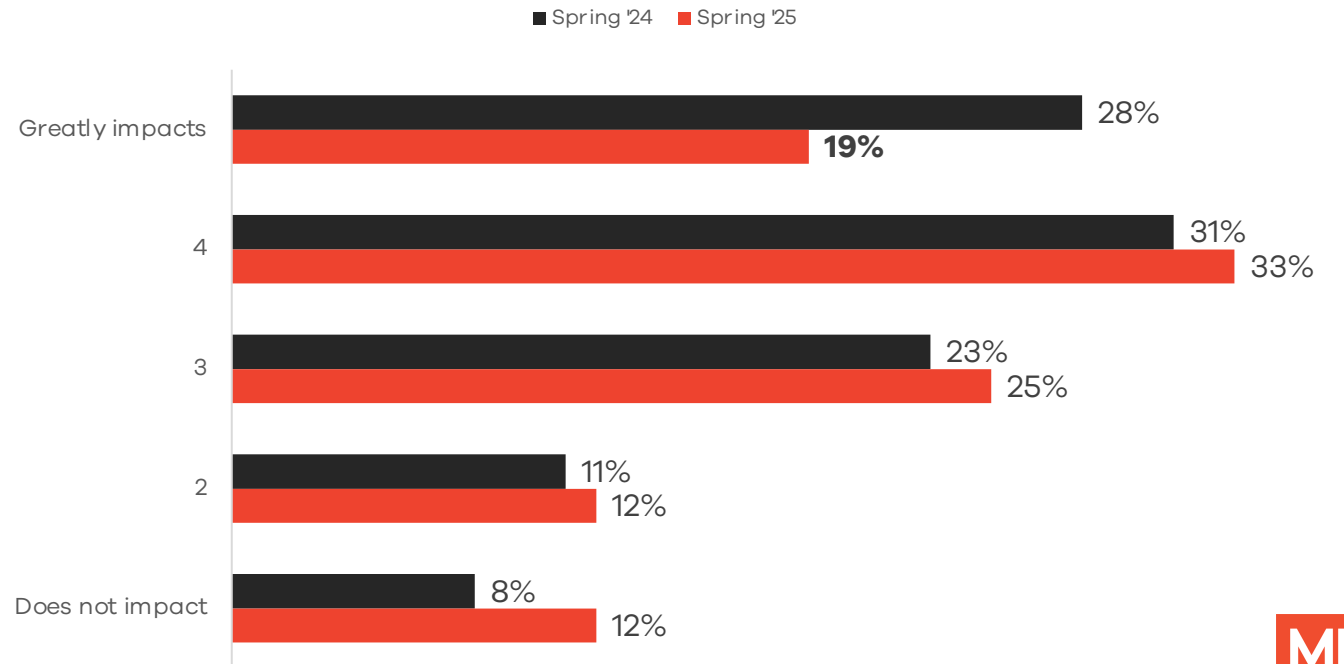
Data in bold indicates a significant difference from Spring 2024.
Base: Air travelers likely to visit Hawaii (n=1,097)
Source: MMGY’s 2025 Portrait of American Travelers® “Spring Edition”

28%
2024

19%
2025

of Air travelers likely to visit Hawaii 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



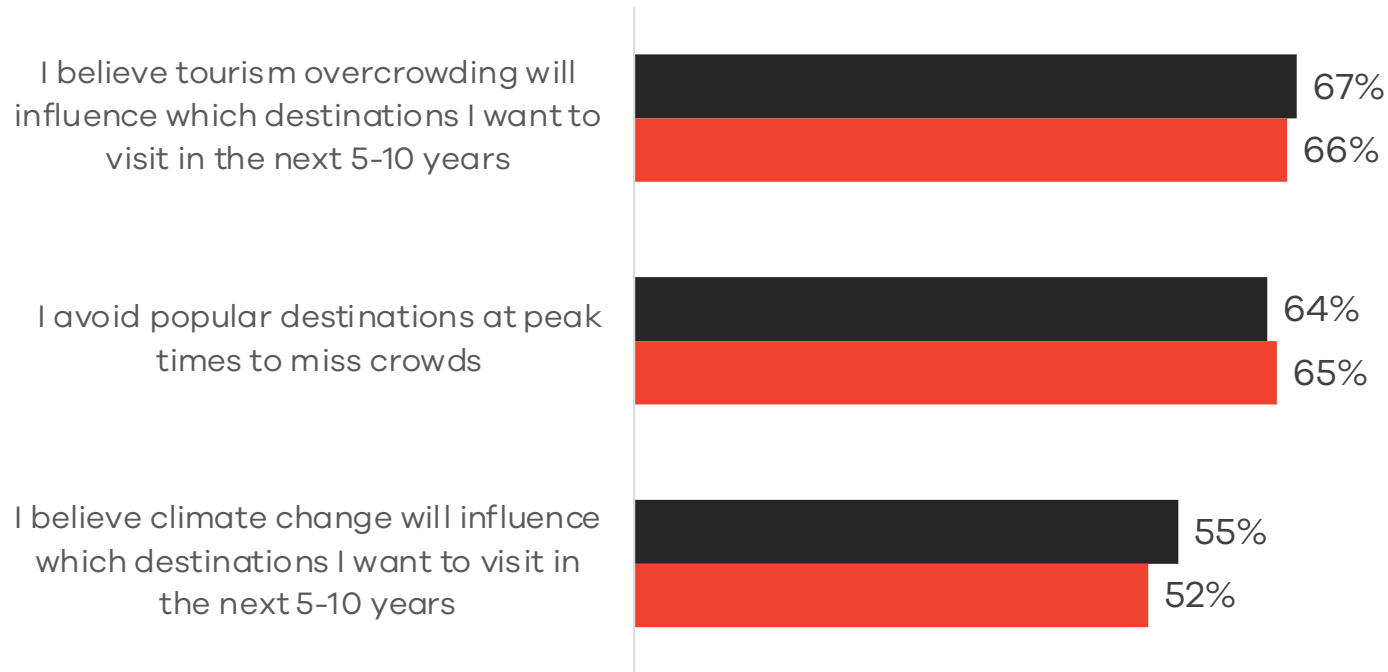
Sustainability in Travel



Compared to Last Year, a Similar Percentage of Air travelers likely to visit Hawaii Are Influenced By Overcrowding and Climate Change When Deciding Which Destinations To Visit.

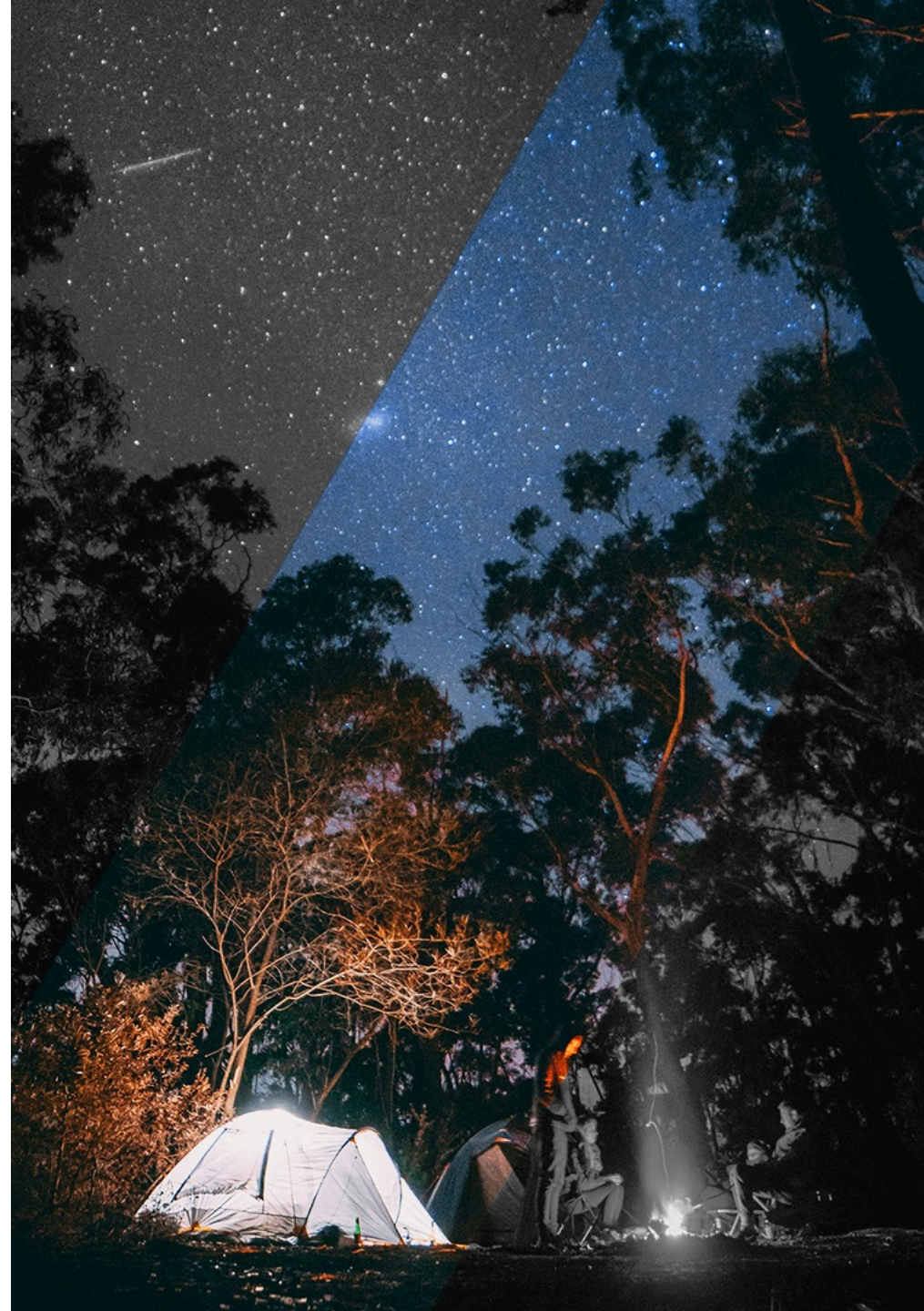
% Strongly/Somewhat Agree

■ Spring '24 ■ Spring '25



Base: Air travelers likely to visit Hawaii (n=1,097)

Source: MMGY's 2025 Portrait of American Travelers® "Spring Edition"



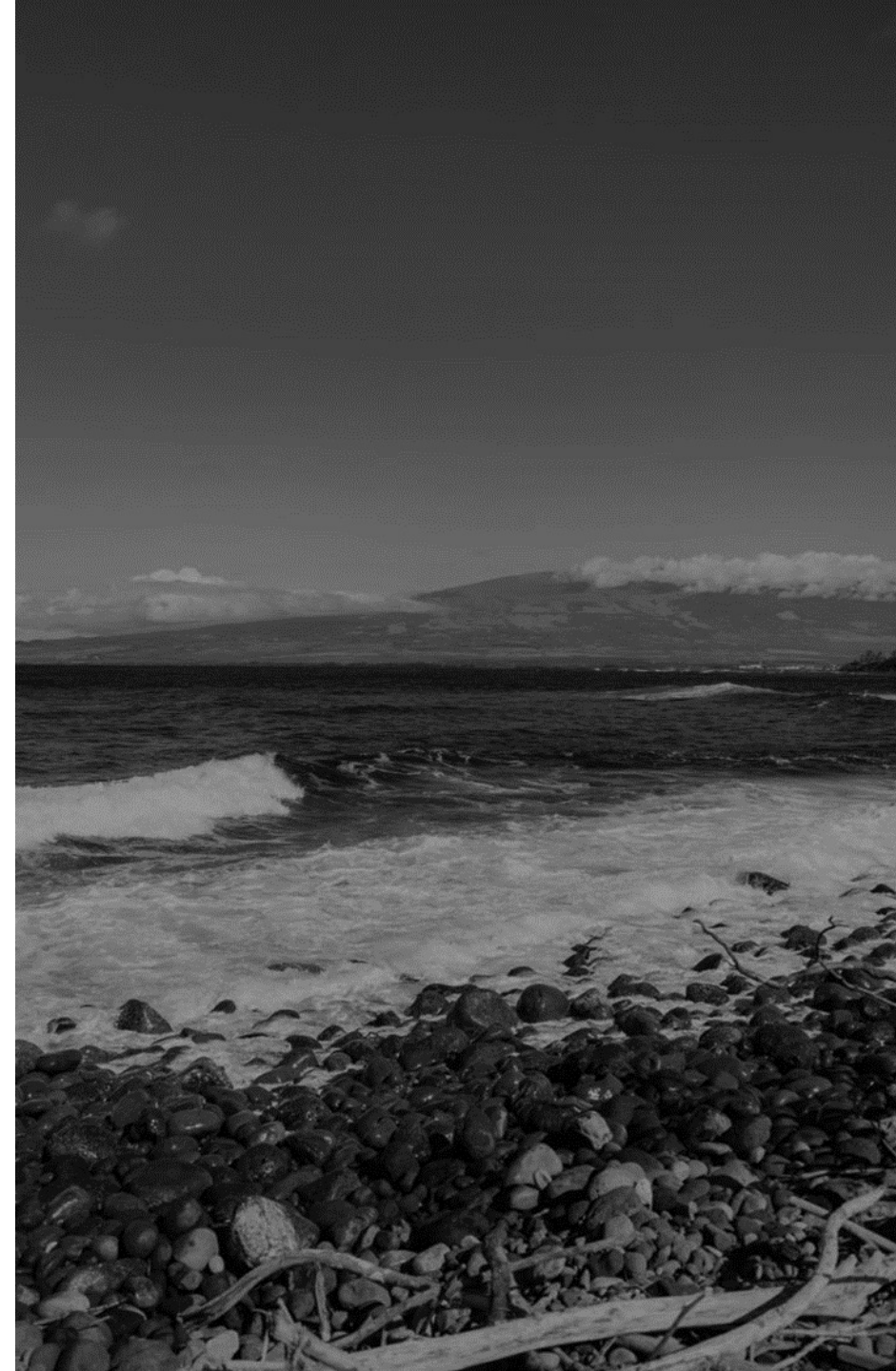
Less air travelers believe that it is important for travel companies to provide an inside look at their sustainable practices compared to 2024.



of Air travelers likely to visit Hawaii believe it is important for travel companies to provide an inside look at how they are becoming more sustainable.

Base: Air travelers likely to visit Hawaii (n=1,097)

Source: MMGY's 2025 Portrait of American Travelers® "Spring Edition"



Spring Module

**Sources of
Travel
Information**



Hawaii prospects are significantly less likely to trust online reviews over the opinions of friends and family compared to 2024.

Data in bold indicates a significant difference from Spring 2024.

Base: Air travelers likely to visit Hawaii (n=1,097)

Source: MMGY's 2025 Portrait of American Travelers® "Spring Edition"

% Strongly/Somewhat Agree

■ Spring '23 ■ Spring '24 ■ Spring '25

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



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



Sources of Travel Information



Specific airline brand websites are used significantly more for travel information compared to Spring 2024 and 2023.

Websites Used Regularly for Travel Information	Spring '23	Spring '24	Spring '25
Google	42%	42%	46%
Expedia	34%	42%	40%
Specific airline brand website	26%	28%	37%
Tripadvisor	39%	36%	36%
Booking.com	27%	36%	35%
Specific hotel brand website	28%	28%	34%
Hotels.com	33%	33%	32%
YouTube	29%	31%	32%
Travelocity	17%	26%	22%
AAA Travel	19%	18%	22%
Priceline	18%	26%	21%
Trivago	23%	26%	20%
Specific cruise brand website	19%	20%	20%
Kayak	17%	18%	19%
Specific vacation destination website	17%	16%	15%
Yelp	13%	14%	13%
Orbitz	13%	16%	12%
Travel blogs	11%	10%	12%

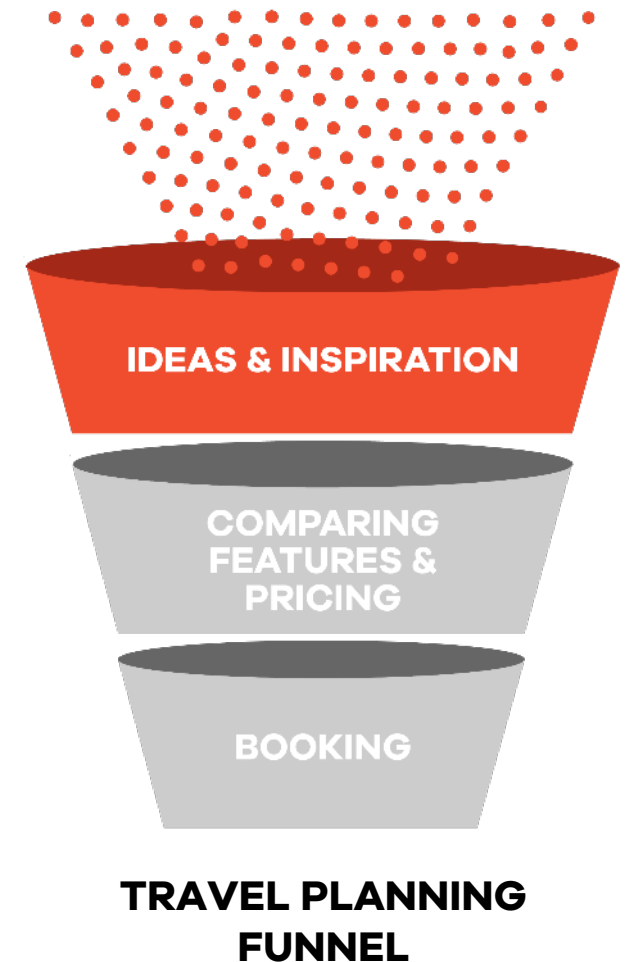
Data in bold indicates a significant difference from Spring 2024.

Base: Air travelers likely to visit Hawaii (n=1,097)

Source: MMGY's 2025 Portrait of American Travelers® "Spring Edition"

Friends and family and travel review websites remain the top sources for ideas and inspiration among Hawaii prospects.

Sources Consider for Ideas & Inspiration	Spring '23	Spring '24	Spring '25
Friends and family	49%	54%	52%
Travel review websites	38%	39%	36%
Destination websites (Visit Orlando, Destination DC, etc.)	29%	34%	30%
Social media posts from destinations or travel service providers	22%	29%	29%
Travel service provider websites (Hilton, Delta, etc.)	32%	32%	27%
Video sharing websites (YouTube, etc.)	24%	26%	26%
Online travel agencies (Expedia, Orbitz, etc.)	25%	34%	25%
Streaming TV services (Netflix, Hulu, etc)	29%	32%	24%
Social media influencers	18%	24%	22%
Television shows	30%	30%	21%
Online visitor guides	33%	28%	21%
Online/social media advertising	21%	25%	21%
Magazine/newspaper articles	23%	25%	19%
Television advertising	26%	22%	19%
Printed visitor guides	22%	19%	15%
Magazine/newspaper advertisements	15%	19%	15%
Traditional travel agents	15%	16%	15%
Email from the destination	16%	14%	15%
Streaming audio (Pandora, Spotify, etc.)	11%	14%	13%
Direct mail	14%	14%	13%
Email from the travel service provider	17%	16%	12%
Podcasts	10%	16%	12%
Content from publishers (Buzzfeed, New York Times, etc.)	15%	13%	12%
Digital newspaper/magazine	16%	14%	10%
Billboards	12%	12%	10%
Radio shows/advertising	12%	11%	8%



Sources of Travel Information

Data in bold indicates a significant difference from Spring 2024.

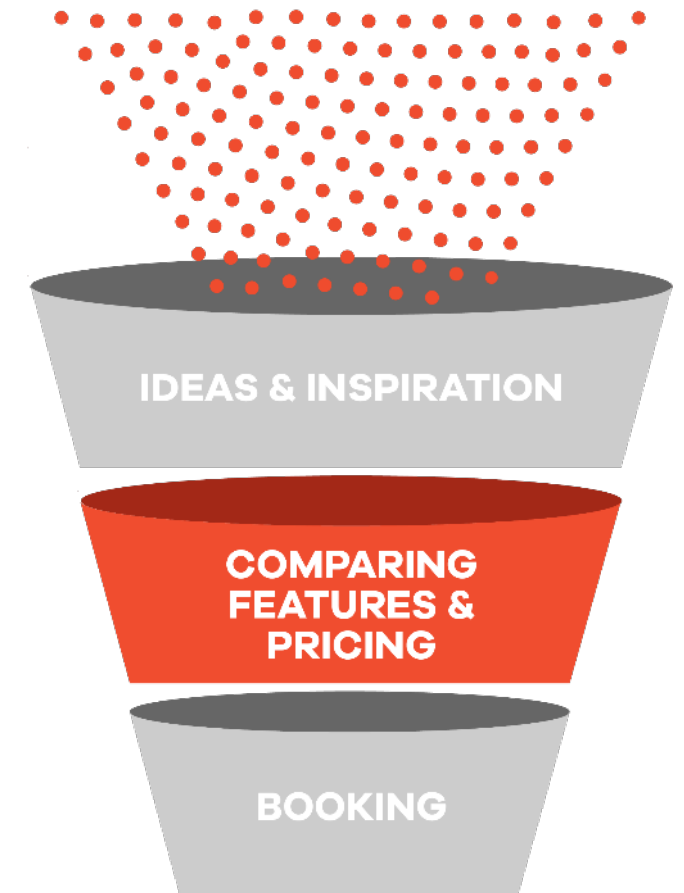
Base: Air travelers likely to visit Hawaii (n=1,097)

Source: MMGY's 2025 *Portrait of American Travelers*® "Spring Edition"



Travel review websites are as important as friend and family recommendations for the first time among Hawaii prospects when comparing features and pricing.

Top 20 Sources for Comparing Features and Pricing	Spring '23	Spring '24	Spring '25
Friends and family	34%	40%	36%
Travel review websites	38%	37%	36%
Travel service provider websites (Hilton, Delta, etc.)	28%	38%	33%
Online travel agencies (Expedia, Orbitz, etc.)	33%	35%	33%
Travel forums (Lonely Planet, Tripadvisor, etc.)	NA	NA	26%
Destination websites (Visit Orlando, Destination DC, etc.)	27%	32%	25%
Online visitor guides	22%	24%	24%
Travel blogs (The Points Guy, The Nomadic Matt, etc.)	NA	NA	20%
Social media posts from destinations or travel service providers	14%	22%	19%
Video sharing websites (YouTube, etc.)	20%	22%	17%
Online/social media advertising	17%	20%	17%
Reddit	NA	NA	17%
Traditional travel agents	15%	20%	16%
Email from the destination	20%	16%	16%
Streaming TV services (Netflix, Hulu, etc.)	24%	20%	15%
Social media influencers	16%	20%	15%
ChatGPT or other AI tools	NA	NA	15%
Printed visitor guides	16%	18%	14%
Television advertising	17%	19%	12%
Magazine/Newspaper articles	11%	18%	12%



TRAVEL PLANNING FUNNEL

NA = Not asked in previous years

Base: Air travelers likely to visit Hawaii (n=1,097)

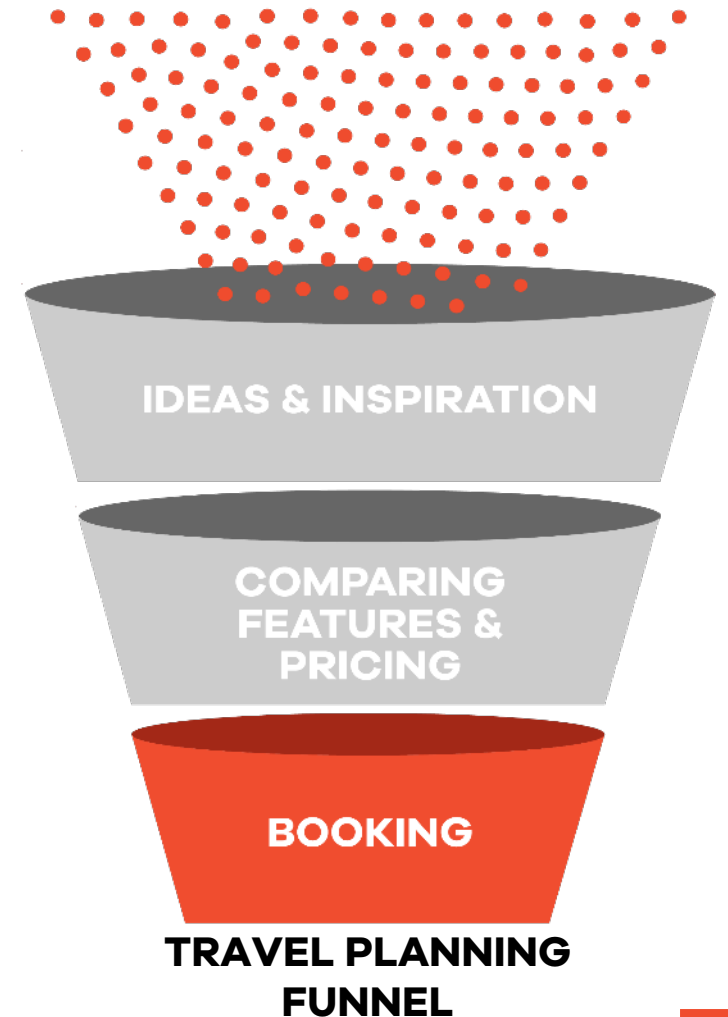
Source: MMGY's 2025 *Portrait of American Travelers*® "Spring Edition"



Sources of Travel Information

Travel service provider websites have surpassed online travel agencies as the preferred platform for reservations in 2025.

Sources Used When Making Reservations	Spring '23	Spring '24	Spring '25
Travel service provider websites (Hilton, Delta, etc.)	48%	50%	56%
Online travel agencies (Expedia, Orbitz, etc.)	46%	53%	51%
Google Travel (Google flights/hotels)	34%	35%	34%
Travel service provider app	25%	27%	29%
Destination websites (Visit Orlando, Destination DC, etc.)	28%	29%	25%
Travel review websites	27%	28%	24%
Calling travel service provider directly	29%	27%	24%



Sources of Travel Information

Base: Air travelers likely to visit Hawaii (n=1,097)

Source: MMGY's 2025 *Portrait of American Travelers*® "Spring Edition"

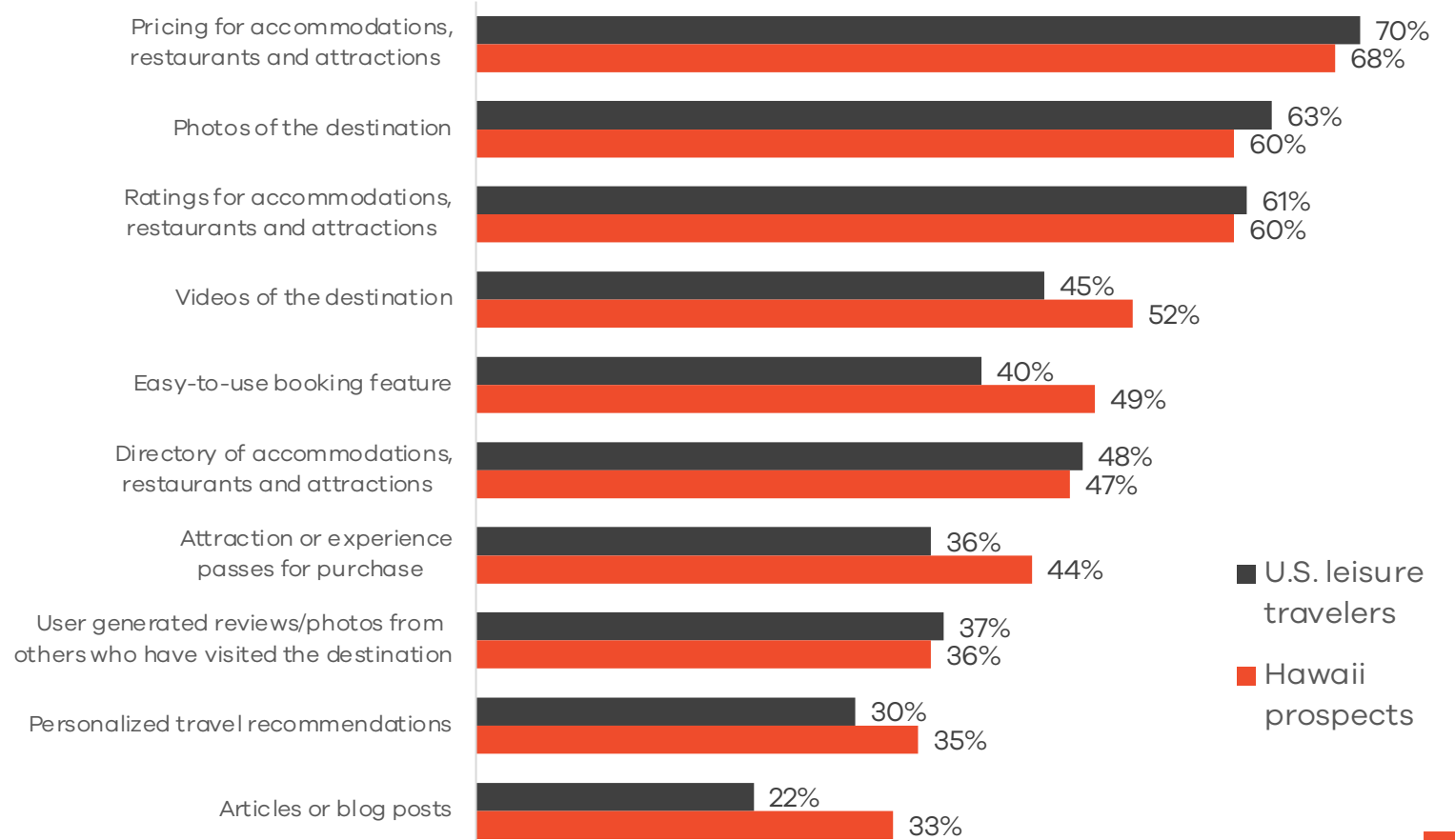


Hawaii prospects value videos of the destination, easy-to-use booking features and attraction or experience passes for purchase more than U.S. leisure travelers.

59%
Likely Hawai'i Visitors

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

Top 10 Valuable Destination Website Features
Among Those Who Regularly Visit Destination Websites



Base: Air travelers likely to visit Hawaii (n=1,097), U.S. leisure travelers who regularly visit destination websites (n=562) and air travelers likely to visit Hawaii who regularly visit destination websites for travel information (n=162)

Source: MMGY's 2025 *Portrait of American Travelers*®

Spring Module

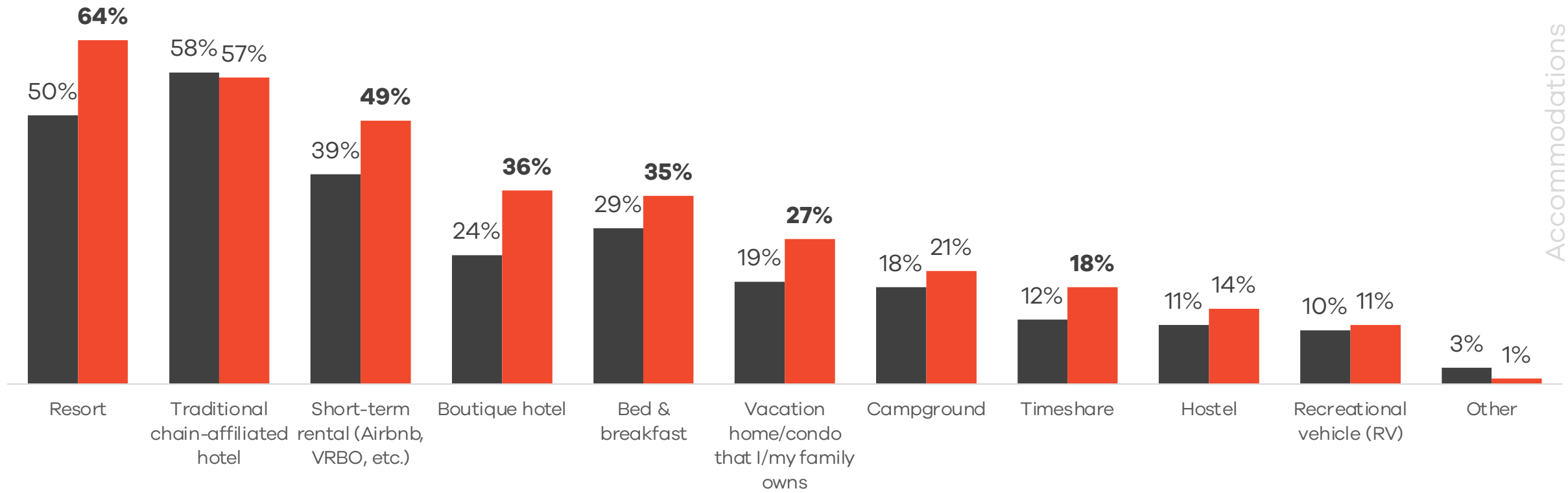
Accommodations



Compared to U.S. leisure travelers, resorts, short-term rentals, boutique hotels and more have significantly higher popularity among Hawaii prospects.

Accommodations Interested in Using During Next 12 Months

■ U.S. leisure travelers ■ Hawaii prospects



Data in bold indicates a significant difference.

Base: U.S. leisure travelers (n=4,162); Air travelers likely to visit Hawaii (n=1,097)

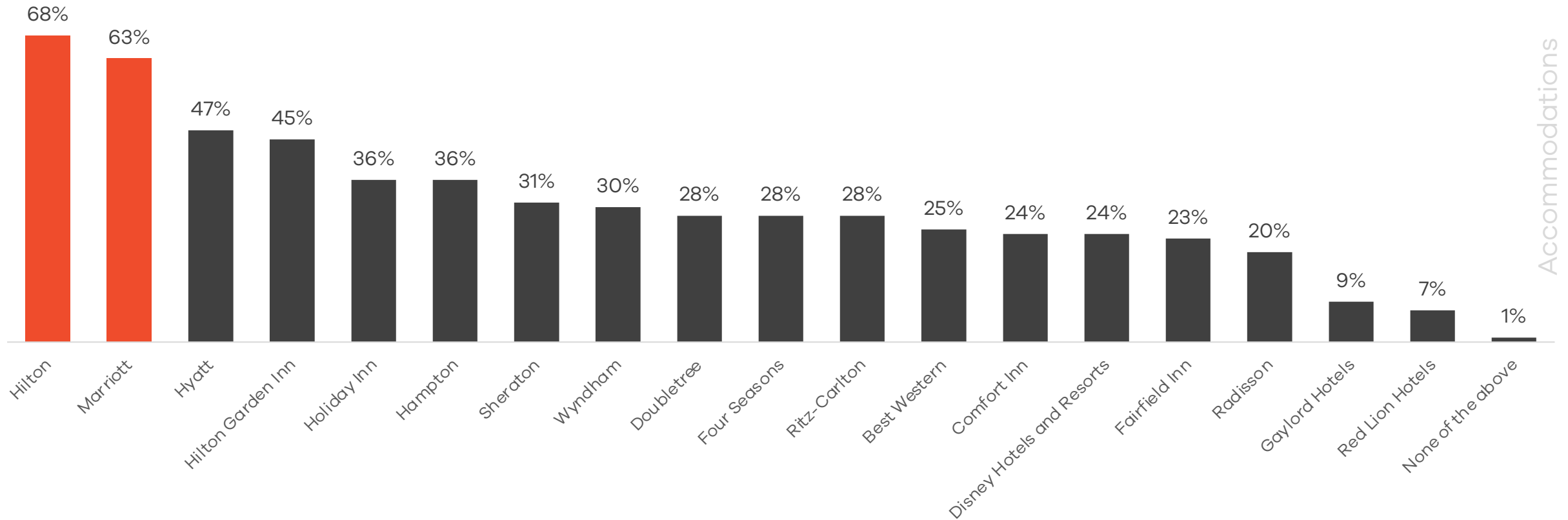
Source: MMGY's 2025 *Portrait of American Travelers*® "Spring Edition"



Accommodations

Hilton and Marriott continue to garner the most interest from likely Hawaii visitors

Hotel Brands Would Consider For Future Vacations



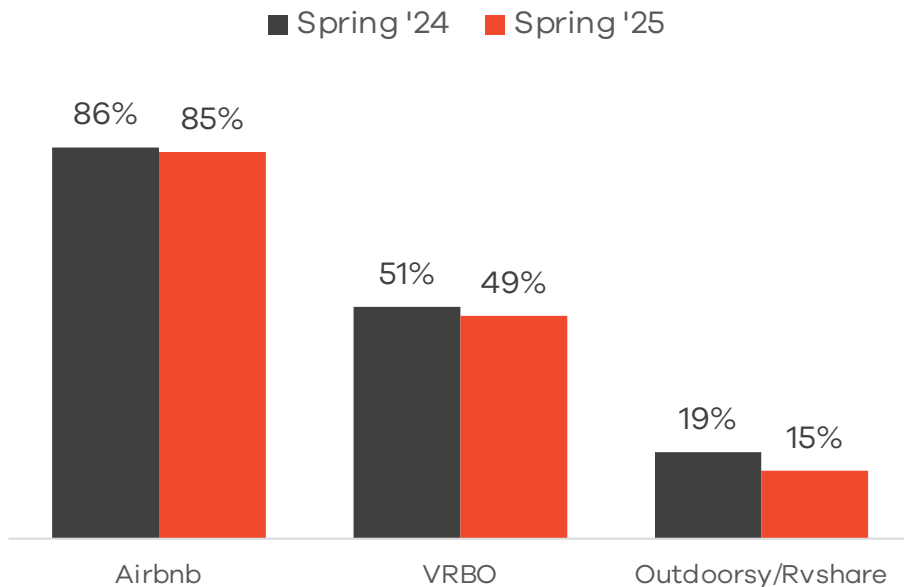
Base: Air travelers likely to visit Hawaii (n=1,097)

Source: MMGY's 2025 *Portrait of American Travelers*® "Spring Edition"



Short-term rental's increasing popularity is driven by their better ability to accommodate large groups, with Airbnb being the go-to company to book through for Hawaii prospects.

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)

Short-term rentals are better for accommodating a large group	48%
I like the idea of vacationing in a home away from home	46%
I want to stay in a unique or unusual place	41%
Short-term rentals are less expensive than hotels	38%
Short-term rentals are typically more interesting in design than traditional hotels or resorts	37%
I want to stay near the people I am visiting	31%
Short-term rentals allow me to vacation with locals in their neighborhood	29%
Other	3%

Accommodations

Base: Air travelers likely to visit Hawaii interested in short-term rentals (n=523)

Source: MMGY's 2025 *Portrait of American Travelers*® "Spring Edition"



Loyalty programs, swimming pools, all-inclusive packages and more are significantly more important to Hawaii prospects than U.S. leisure travelers when choosing accommodations.

Important Factors When Choosing Accommodations	U.S. leisure travelers	Hawaii prospects
Value for the price	65%	65%
Location	64%	63%
Room rate	55%	54%
Cleanliness standards/promise	55%	53%
Free breakfast	51%	51%
Loyalty/frequent stay program	35%	43%
Food/restaurant options available at accommodation	39%	42%
Previous experience/reputation of the accommodation brand	39%	41%
Free internet access from public areas (pool, lobby, etc.)	38%	41%
Swimming pool	34%	40%
Located within walking distance of restaurants/bars	36%	38%
Recommendation of friends/family	33%	38%
Complimentary late check-out option	25%	36%
Consumer reviews (i.e. Tripadvisor)	30%	34%
All-inclusive stay package	26%	34%
Complimentary local transportation to restaurants/shopping	19%	22%
On-site fitness center	15%	21%
24-hour room service	15%	19%
On-site spa	11%	17%
Pets allowed to stay in room	14%	15%
Wellness focus	8%	14%
Communal space to hang out, work or socialize	8%	13%
Kids' club/organized family activities	8%	12%

Accommodations

Data in bold indicates a significant difference.

Base: U.S. leisure travelers (n=4,162); Air travelers likely to visit Hawaii (n=1,097)

Source: MMGY's 2025 *Portrait of American Travelers*® "Spring Edition"



Free internet access and a refrigerator are the top room features Hawaii prospects look for, both of which have increased in importance significantly from 2023.

Importance of In-Room Features/Attributes	Spring '23	Spring '24	Spring '25
Free internet access	54%	59%	62%
Refrigerator (for personal use)	45%	49%	54%
Size and/or layout of room	38%	46%	47%
Free bottled water in room	33%	38%	41%
Proper water temperature and pressure	38%	42%	40%
Premium mattress	38%	40%	40%
Microwave	32%	37%	38%
Multiple electrical outlets for charging personal devices	33%	36%	37%
Balcony	35%	39%	36%
Premium bed linens	29%	34%	34%
Sound-proof room	27%	32%	32%
Premium soaps, shampoos, conditioners	32%	33%	29%
Free premium movie streaming channels (Netflix, Disney, etc.)	25%	30%	26%
Free premium television channels (HBO, Starz, etc.)	26%	28%	24%
Selection of pillows	23%	27%	24%
In-room mini-bar/refrigerator stocked with drinks/snacks	18%	23%	24%
Ability to watch in-room entertainment on personal mobile devices	13%	22%	21%
Spa-style bathtub	20%	21%	20%
In-room dining service without additional fees or delivery charges	21%	23%	18%
Remote access to guest room from smart phone	16%	15%	12%
Hardwood/tile flooring	16%	14%	11%
Biometric access to guest room	7%	10%	8%

Base: Air travelers likely to visit Hawaii (n=1,097)

Source: MMGY's 2025 *Portrait of American Travelers*® "Spring Edition"



An aerial photograph showing two boats on a body of water. The water is a vibrant turquoise color, and the surrounding area is a dark, textured grey. One boat is white with blue accents and has several people on board. The other boat is a grey motorboat. The text 'Vacation Motivators and Activities' is overlaid in large white font on the right side of the image.

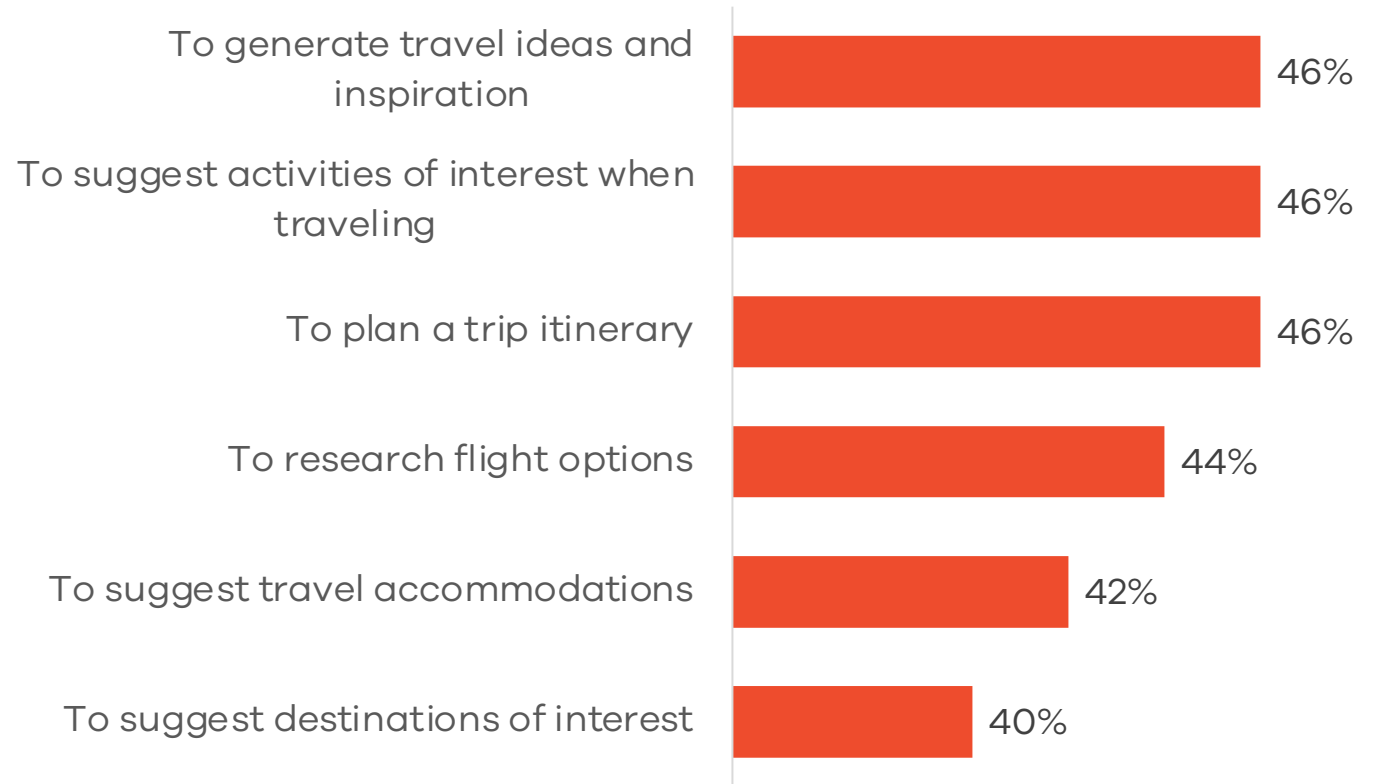
Vacation Motivators and Activities

Compared to U.S. leisure travelers, 16% more Hawaii prospects use ChatGPT or other AI tools when planning travel.

50%

of Air travelers likely to visit Hawaii have used ChatGPT or another AI tool for travel planning (compared to 33% of total U.S. leisure travelers).

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



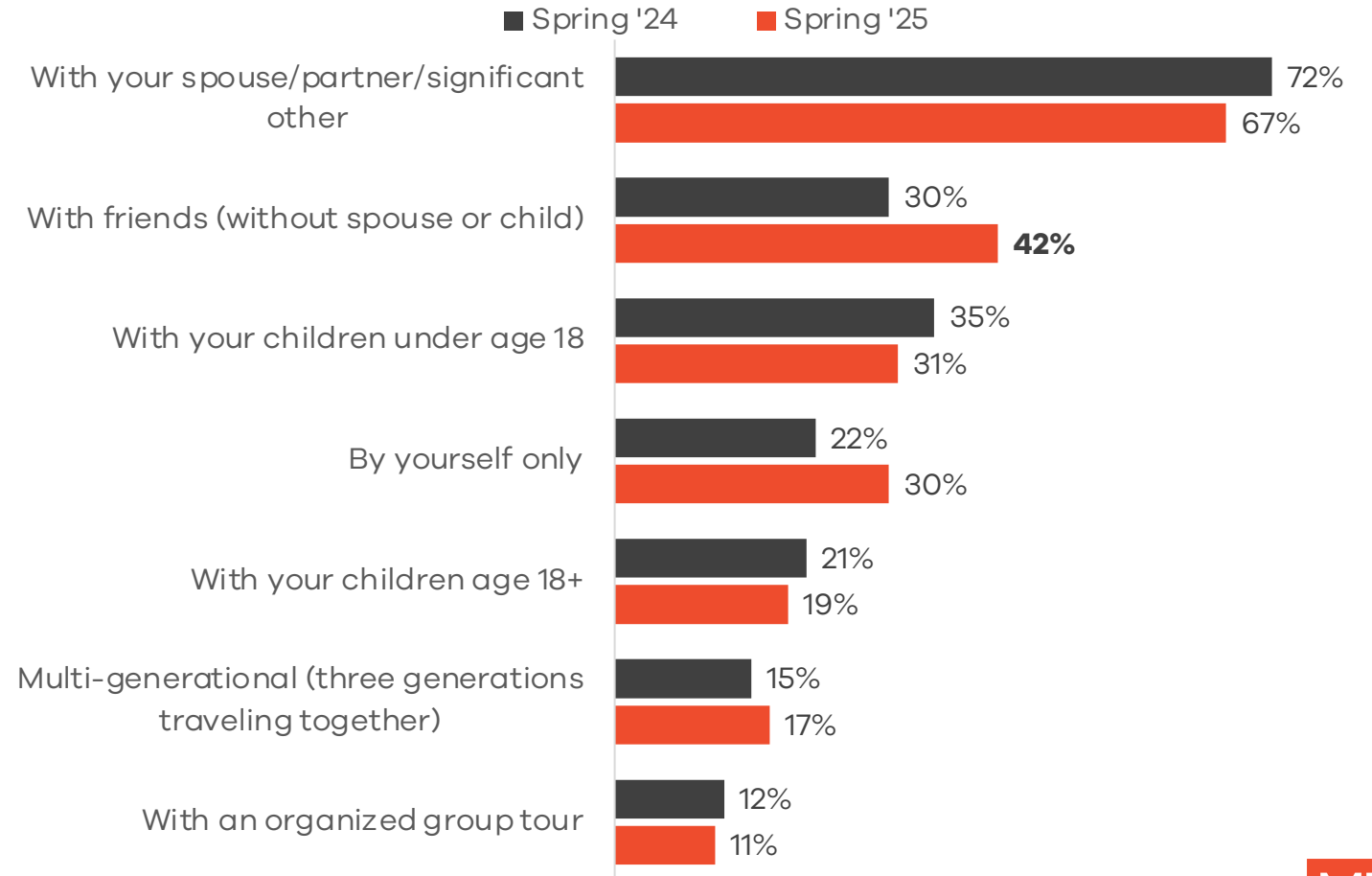
Base: Air travelers likely to visit Hawaii (n=1,097); those who have used ChatGPT or another AI tool for travel planning (n=514)

Source: MMGY's 2025 *Portrait of American Travelers*® "Spring Edition"



Hawaii prospects are significantly more likely to travel with friends in the next six months compared to Spring 2024.

Travel Party During the Next Six Months



Data in bold indicates a significant difference from Spring 2024.

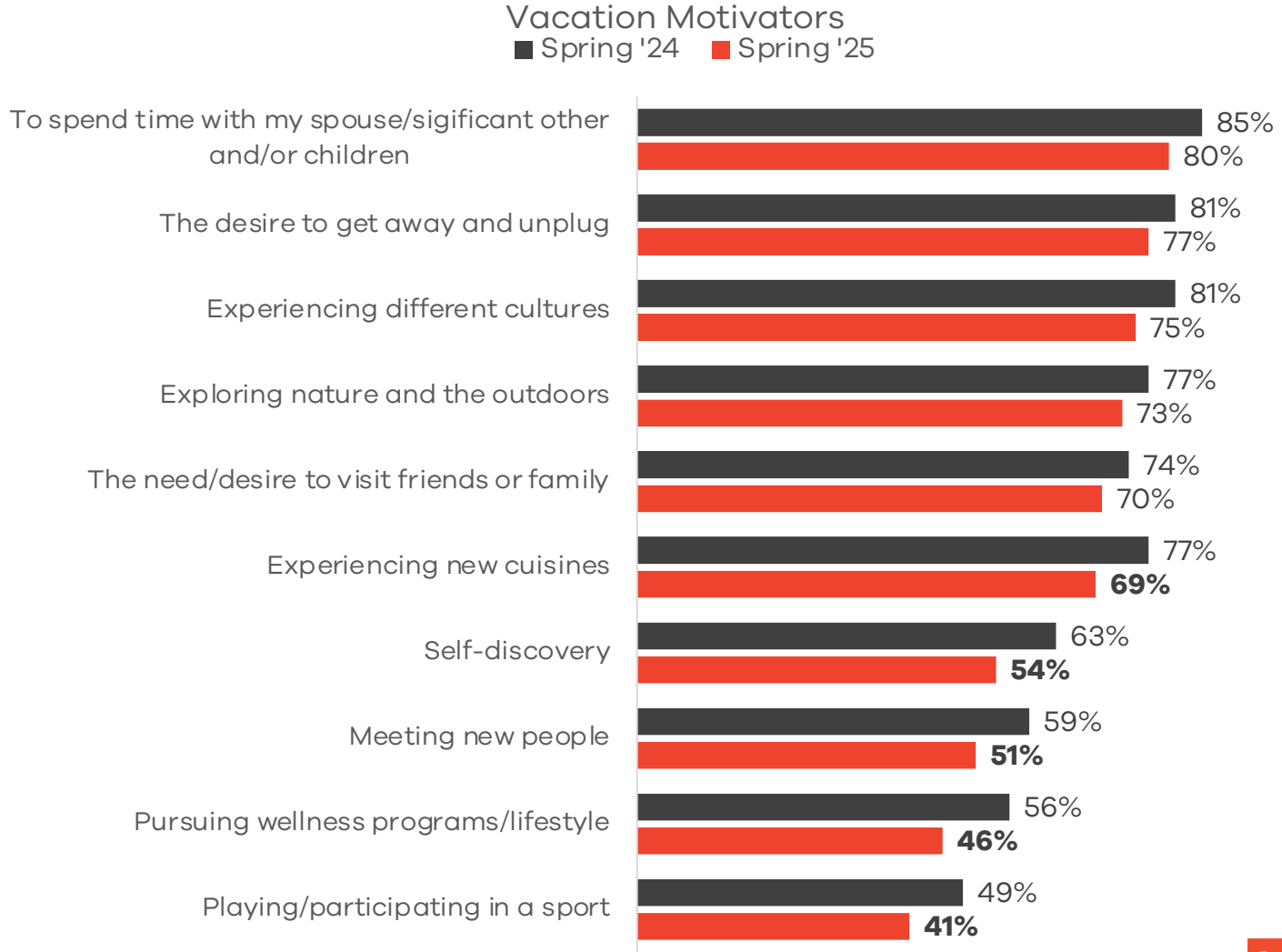
Base: Air travelers likely to visit Hawaii who intend to travel during the next six months (n=625)

Source: MMGY's 2025 *Portrait of American Travelers*® "Spring Edition"





Primary vacation motivators are spending time with a significant other and the desire to get away and unplug.



Data in bold indicates a significant difference from Spring 2024.
Base: Air travelers likely to visit Hawaii (n=1,097)
Source: MMGY's 2025 *Portrait of American Travelers*® "Spring Edition"



What Destination Attributes Influence Choice of Destination?

Influential When Selecting a Destination	Spring '23	Spring '24	Spring '25
Beautiful scenery	65%	74%	76%
Food and drink scene	58%	63%	65%
Outdoor/nature activities	45%	54%	60%
Safety	58%	63%	59%
Historical significance of a destination	48%	50%	51%
Focus on family activities	34%	36%	36%
A sense of tradition (place family has traditionally visited)	33%	32%	36%
The ethnic diversity and multicultural population of a destination	25%	34%	32%
Music scene	26%	25%	31%
Nightlife/bars	25%	29%	28%
The destination's reputation for environmental responsibility	24%	24%	22%
The destination's commitment to social justice and equality	18%	16%	19%
LGBTQ+ travel offerings	11%	8%	9%

Data in bold indicates a significant difference from Spring 2024.

- / Outdoor/nature activities and the music scene are the two destination attributes which are significantly more important in Spring 2025 compared to the previous year.
- / Beautiful scenery, the food and drink scene, outdoor/nature activities and safety are the top destination attributes overall, mirroring trends seen from all U.S. leisure travelers, who also place a significant emphasis on feeling secure and beautiful surroundings when on holiday.

Activities of Interest on Vacation

Top 20 activities of interest	Spring '24	Spring '25
Beach experiences	59%	64%
Historical sites	47%	55%
Visiting a state or national park	48%	53%
Shopping	49%	52%
Visiting a museum	44%	51%
Visiting a theme or amusement park	43%	41%
Food tours	41%	41%
Dining cruise	41%	41%
Visiting a zoo or aquarium	41%	41%
Hiking/climbing/biking/other outdoor adventures	35%	41%
Guided tours with access to local experiences that are otherwise inaccessible	33%	39%
Adventure travel (safaris, mountain climbing, trekking vacations, etc.)	36%	38%
Visiting notable architectural sites	34%	37%
Attending a concert/music festival	31%	37%
Cooking, wine or cocktail class	34%	33%
Nightlife	33%	33%
Attending a sporting event	27%	33%
Spa Services (massages, facials, etc.)	32%	32%
Water sports (waterskiing, boating/rafting)	26%	29%
Dinner theatre	31%	28%
Casino gambling	27%	27%
Exploring family's ancestry/past on a heritage vacation	24%	27%
Attending performing arts events	25%	26%
Camping	21%	26%
Film/art festivals	22%	23%
Snow skiing/snowboarding	20%	20%
Playing golf	18%	18%
Scuba diving	18%	18%
Playing tennis	13%	15%

- / Beach experiences, shopping, visiting a state/national park and historical sites are the top activities of interest for Likely Hawaii visitors.
- / Significant increases in interest for historical sites and museums indicates that Hawaii prospects are seeking culture-packed vacations.

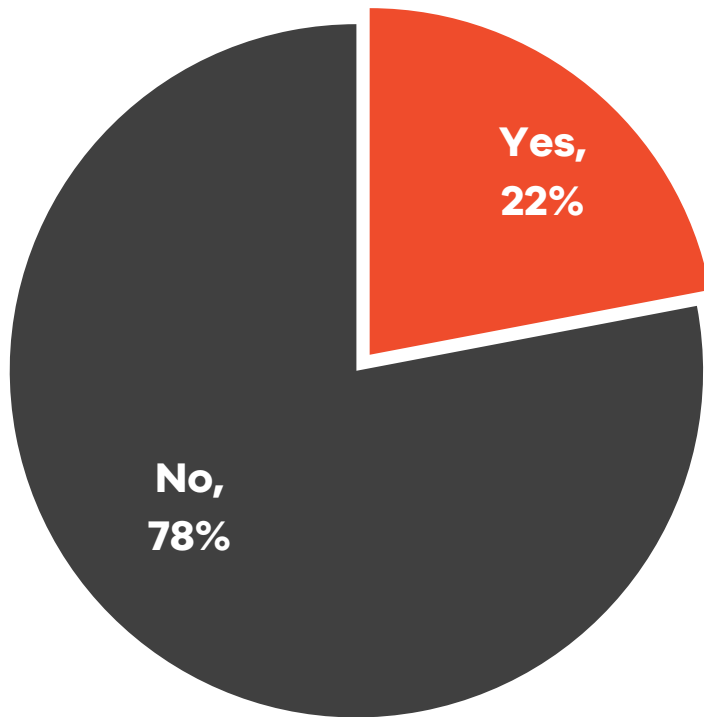
Data in bold indicates a significant difference from Spring 2024.

Base: Air travelers likely to visit Hawaii (n=1,097)

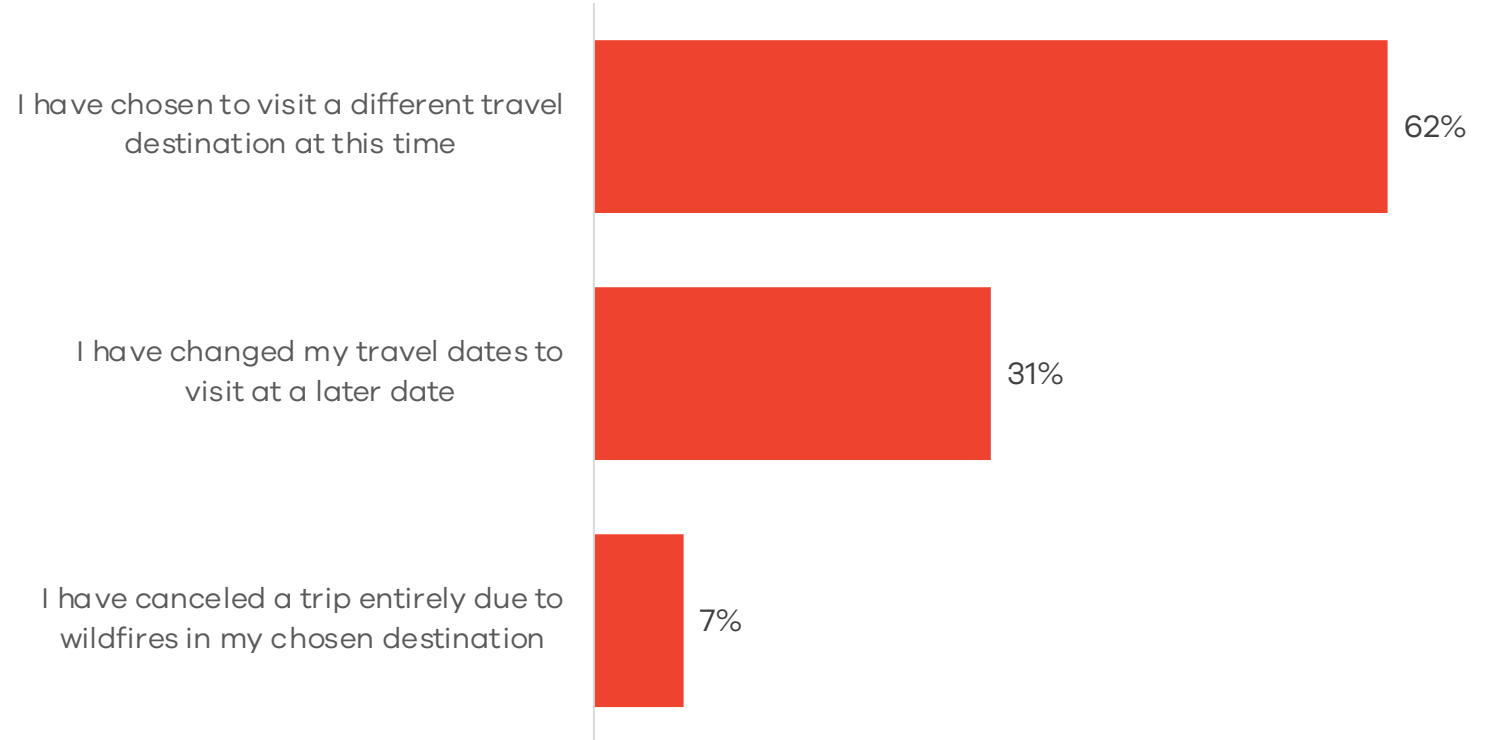
Source: MMGY's 2025 *Portrait of American Travelers*® "Spring Edition"

More Hawaii prospects (22%) have canceled or altered travel plans recently due to wildfires compared to U.S. leisure travelers (15%).

Thinking about your recent past or future travel plans, have you had to alter plans due to wildfires in or near your chosen destination?



How have you altered your travel plans due to wildfires in or near your chosen destination?

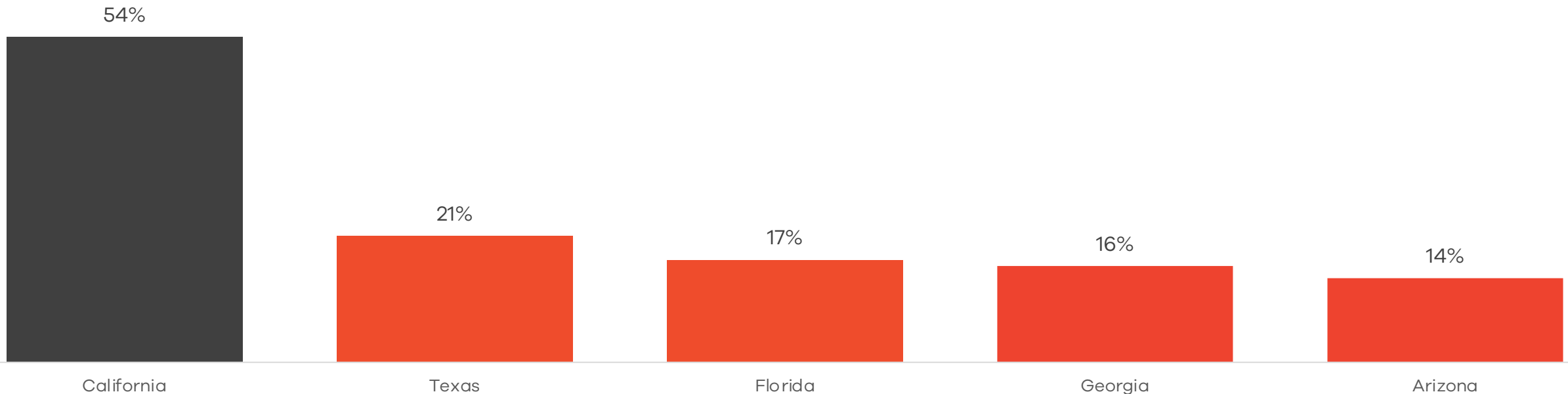


Base: Air travelers likely to visit Hawaii who have altered/canceled travel plans due to wildfires (n=287)

Source: MMGY's 2025 *Portrait of American Travelers*® "Spring Edition"

The destination most affected by wildfires has been California by a significant margin.

For which of the following destinations have you recently cancelled or altered travel plans due to wildfires? (Top 5 destinations)



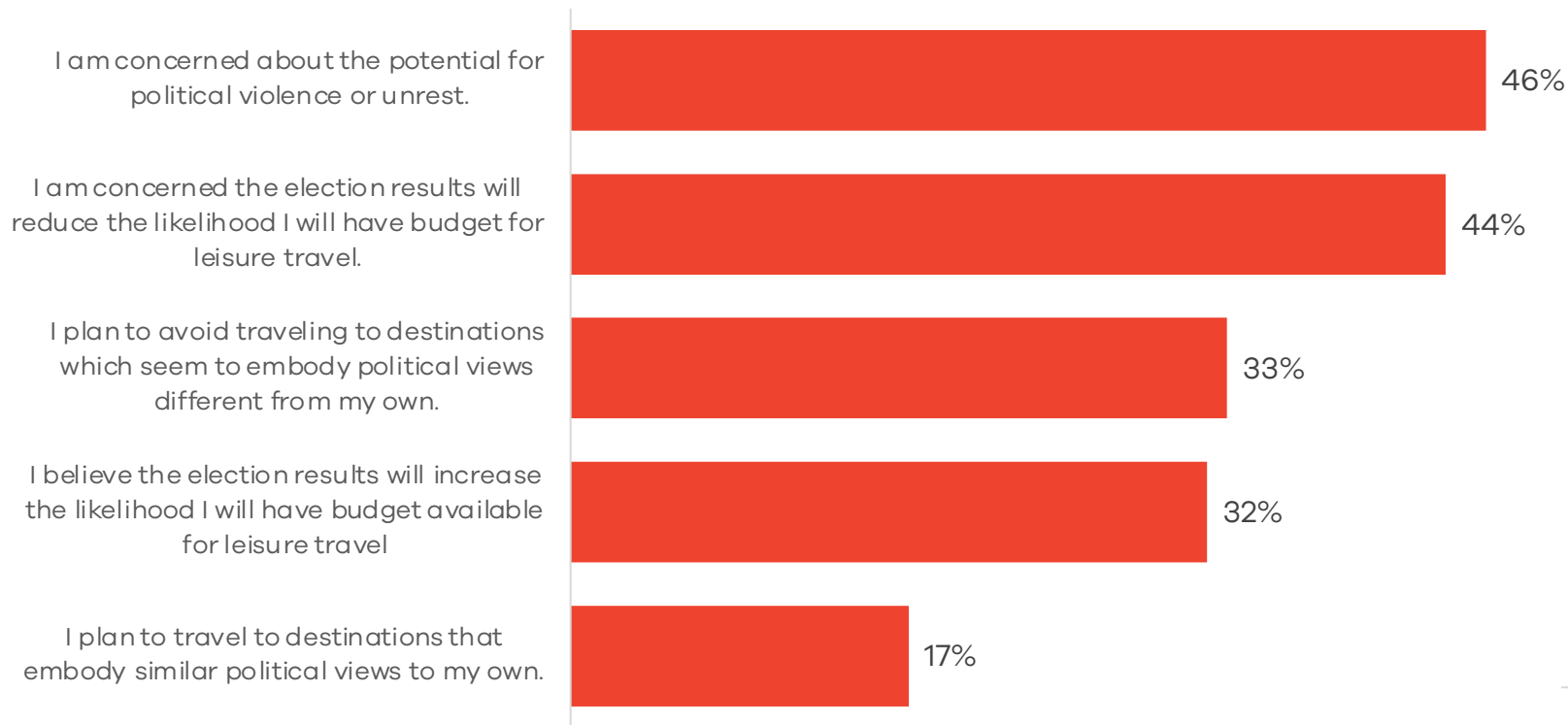
The most affected destination is shaded in black.

Base: Air travelers likely to visit Hawaii who have altered/canceled travel plans due to wildfires (n=287)

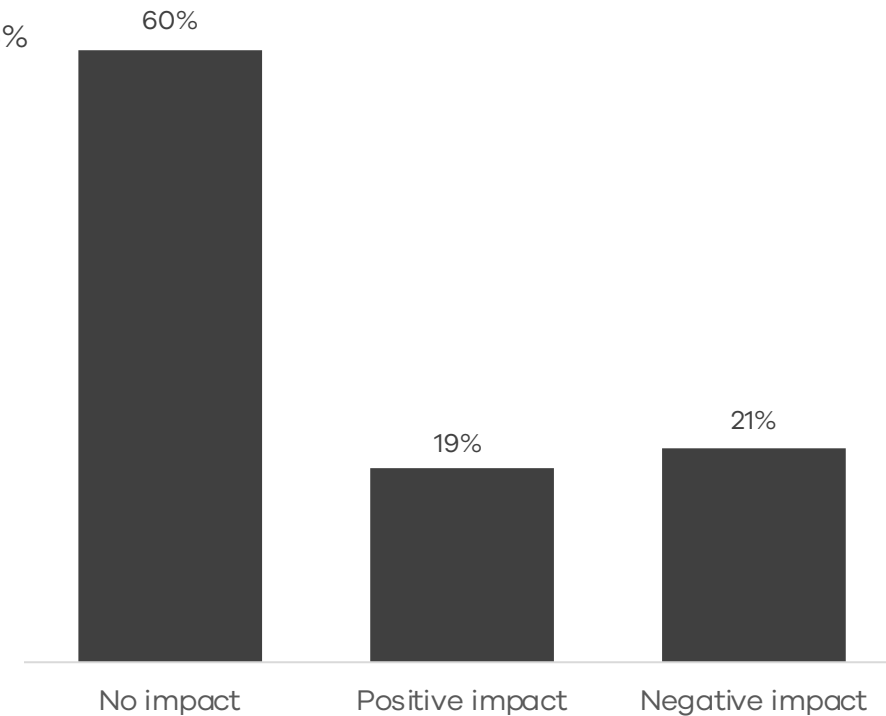
Source: MMGY's 2025 *Portrait of American Travelers*® "Spring Edition"

Around 1 in 5 Hawaii prospects believe the election will have a positive impact on their likelihood to travel internationally, with a similar proportion affected negatively.

Which of the following reasons explain why you feel your international travel may be impacted by 2024's presidential election?



What impact will 2024's presidential election have on your likelihood to travel internationally through the end of 2025?



Base: Air travelers likely to visit Hawaii (n=1,097), Travelers who expect the presidential election to impact international travel (n=473)

Source: MMGY's 2025 *Portrait of American Travelers*® "Spring Edition"





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THANK YOU.