



PORTRAIT

of American Travelers™

2025
SUMMER

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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 4,509 U.S. adults in May 2025.

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 976 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	18–28	14%
Millennials	29–44	40%
Gen Xers	45–60	25%
Boomers	61–79	20%
Silent/GI	80+	1%



Key Insights

Key Insights

Hawai'i Tourism Proprietary Questions

- Interest in visiting Hawai'i is at the highest level since November 2023, with 69% of U.S. leisure travelers interested in visiting the state in the next two years.
- Older travelers and those with a household income above \$100,000 have a stronger interest in visiting Hawai'i to younger and less wealthy travelers, as well as desire to visit among these groups increasing steadily since Summer 2023.
- Florida and California are the top competitor destinations to Hawai'i, with almost half of likely Hawai'i travelers visiting these two states during the past three years. Additionally, significantly more prospects have visited Europe and Hawai'i in the past three years, indicating that there is a stronger demand for repeat visits to Hawai'i compared to previous years.
- Air travel is significantly more popular among Hawai'i prospects compared to the U.S. leisure traveler, with almost 9 in 10 (88%) prospects traveling with a scheduled airline in the past 18 months. This highlights prospects strong desire to travel further away from home, whether it is internationally or domestically, these travelers seek to experience new destinations far removed from their homes.

Traveler Outlook

- Overall travel outlook is slightly diminished compared to previous years, with economic and political uncertainty denting traveler confidence and spending for the coming 12 months.
- Despite this, likely Hawai'i visitors still intend to spend \$6,500 in the next 12 months, as well as take 4.6 leisure vacations in the same period. This represents a slight decrease in spending from Summer 2024 (\$6,868), although prospects plan to spend almost \$2,000 more than the average U.S. leisure traveler (\$4,699 vs. \$6,500) in 2025.
- Likely Hawai'i visitors cite the impact of tariffs and the impact of the U.S. presidential election as the biggest factors affecting their vacation plans, with concerns about their personal financial situation also increasing significantly from Summer 2024.
- These concerns are leading to travelers booking their vacations further in advance, with 1 in 4 (24%) prospects booking their vacation within the next 6 months compared to just 18% in Summer 2024.

Key Insights

Where People Want to Visit

- California, Florida and Colorado are the top competitor states to Hawai'i among likely visitors, with sunshine and fantastic beaches clearly a significant travel motivator among prospective Hawai'ian visitors.
- Outside of Hawai'ian destinations, San Diego, New York City and Las Vegas are the top spots likely Hawai'i visitors are looking to travel to in 2025.
- Europe and the Caribbean are the top international destinations for these travelers, mirroring the top two destinations seen in the previous two years.

Road Trips

- Road trips are an extremely popular vacation type among Likely Hawai'i visitors, as well as American travelers in general, with 78% of prospects planning to take a road trip during the next 12 months.
- Being able to explore multiple places and be spontaneous are primary motivators for these trips, highlighting the appeal of not having a fixed itinerary and the freedom to make changes at short notice.
- The Pacific Coast Highway is the most popular road trip route by a significant margin, with 1 in 3 (32%) Hawai'i prospects planning to travel along this route.

Diversity in Travel

- More likely Hawai'i visitors have felt unwelcomed in destinations compared to the previous two years, with half (49%) of these travelers believing there are inequities in the travel industry.
- Offering diverse cultural experiences as well as showcasing the diversity of the destination are the most important features which prospects look for. Engaging with local communities and underrepresented groups has significant appeal among likely Hawai'i visitors.

Family Travel

- The role of children in travel continues to grow for the 48% of prospective Hawai'i visitors who are planning to travel with their children under 18 in the next 12 months.
- In particular, the percentage of children who have a role in planning daily activities has increased 6% since Summer 2023 to 83% overall. It is essential for destinations to appeal to young travelers, with attractions and activities that bring in children will drive parents and larger family groups to the destination.

Key Insights

Travel Advisors

- Despite the growing role of technology in travel, traditional travel agents continue to be indispensable, with 45% of likely Hawai'i visitors planning to use the services of travel advisors during the next two years.
- Tighter economic conditions are the primary driver behind increasing use of travel advisors, with half (48%) of prospects planning to use a travel advisor citing getting lower vacation prices as the top reason to use a traditional travel agent.

Cannabis Tourism

- Compared to the average U.S. leisure traveler, more Hawai'i prospects are interested in recreational cannabis experiences while on vacation (43% vs. 36%).
- Prospects are attracted to a wider assortment of cannabis-related activities while traveling, with modern cannabis lounge activities and sampling cannabis for the medicinal and therapeutic benefits cited by more prospects than the U.S. leisure traveler.
- Furthermore, prospects are more interested in experiencing the intoxicating effects of cannabis compared to U.S. leisure travelers (46% vs. 39%).

Traveler Perspectives

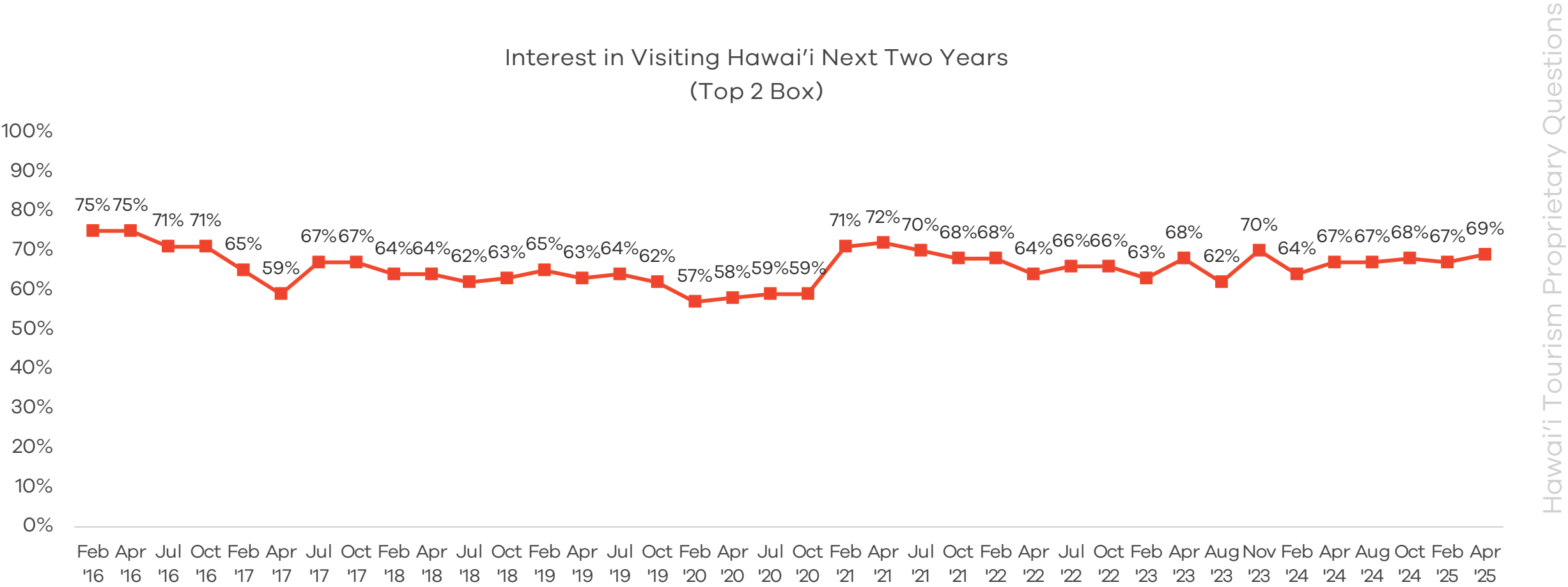
- Optimism among Hawai'i prospects is high for the majority of categories, especially optimism in their own future and the future of their children. Additionally, optimism in the future of the U.S. has risen significantly from the previous two years, despite recent economic and political turmoil in the country.
- Luxury is very important to the 53% of prospects who consider themselves to be luxury travelers, with these travelers most willing to pay for luxurious hotel suites/accommodations, upscale restaurants and first/business class airline seats.

Vacation Motivators

- AI usage has seen a significant increase in Summer 2025, with more likely Hawai'i visitors than ever, 64%, using AI tools for travel planning. AI is used in combination with human experts, with 51% of prospects using a combination of AI and human sources to find and review sources when planning travel.
- Beautiful scenery and the food and drink scene are the top two destination attributes which Hawai'i prospects look for when traveling.

Hawai'i Tourism Proprietary Questions

Interest in visiting Hawai'i is at its highest point since November 2023.

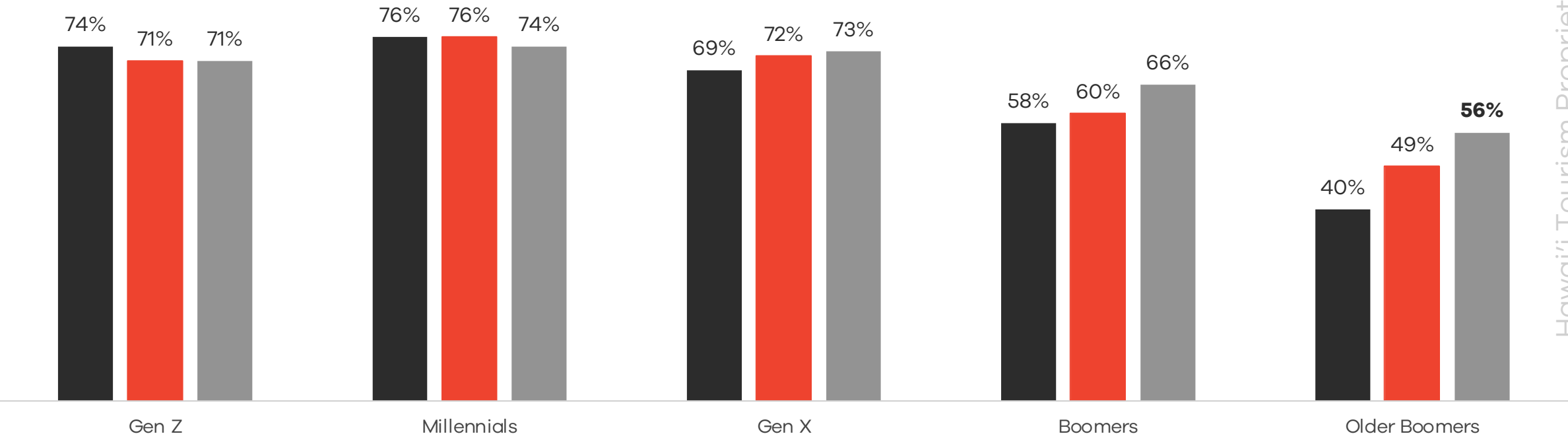


Base: U.S. Leisure Travelers (n=3,546)
Source: MMGY's 2025 *Portrait of American Travelers*® "Summer Edition"

Hawai'i is becoming more popular with older U.S. leisure travelers, especially Boomers.

Interest in Visiting Hawai'i
By Generation

■ Summer '23 ■ Summer '24 ■ Summer '25



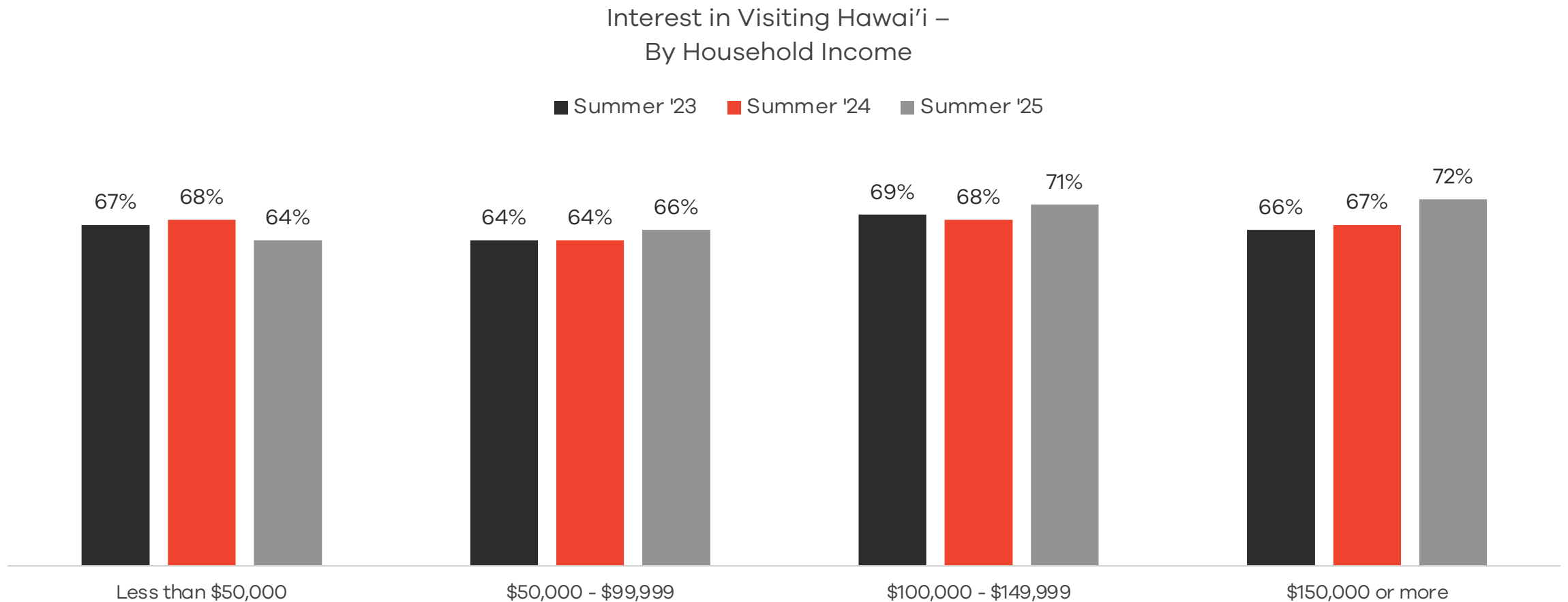
Data in bold indicates a significant difference from Spring 2024.

Base: U.S. Leisure Travelers (n=3,546)

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

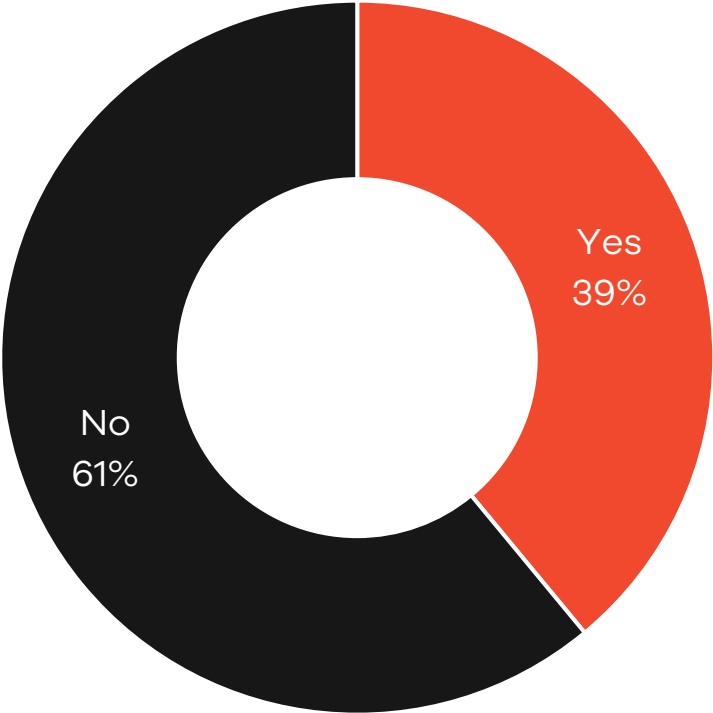
Hawai'i Tourism Proprietary Questions

Interest in Hawai'i is strong for all income levels, although higher-income travelers are both more likely and more interested in visiting the state overall.



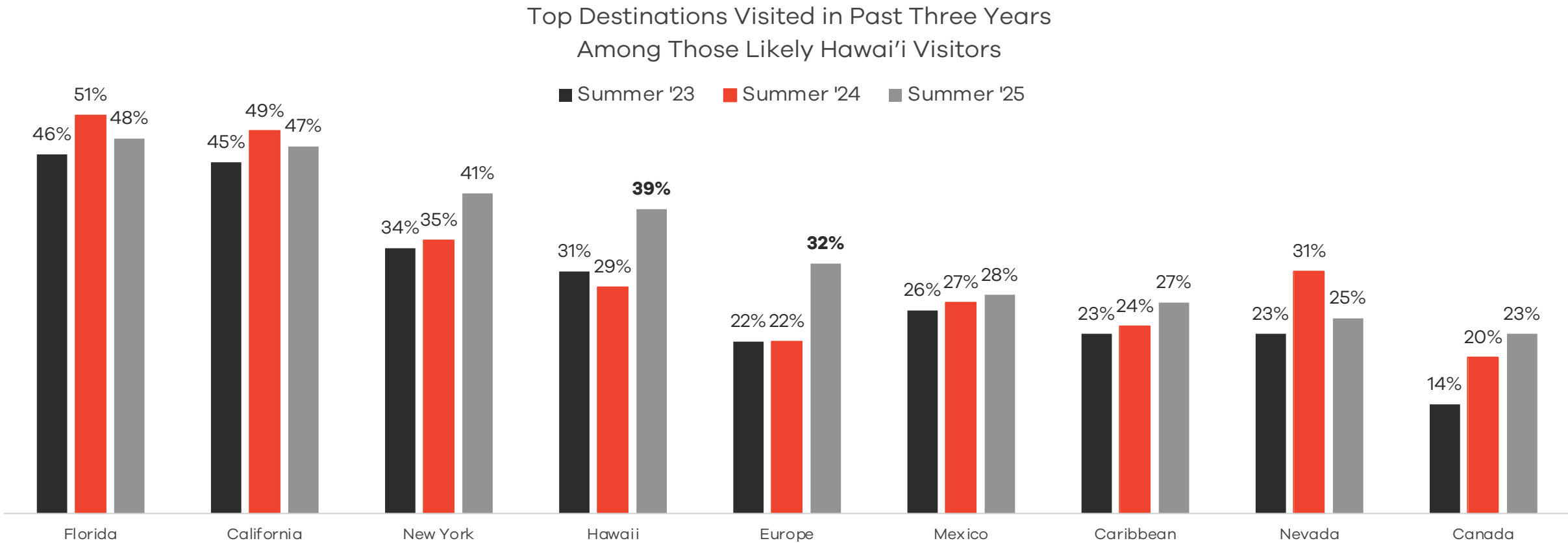
The cost to visit Hawai'i continues to be the most cited deterrent to visiting.

Considered Visiting Hawai'i But Changed Their Mind



Reasons For Not Visiting Hawai'i – Among Air Travelers Who Changed Their Mind	2023	2024	2025
Price of the airfare	40%	37%	39%
Price of the vacation package	32%	30%	32%
Price of the hotel	32%	30%	31%
Better value at another destination	22%	27%	26%
The flight to Hawai'i is too long	23%	24%	23%
Been to Hawai'i before, I wish to try another destination	12%	13%	17%
I don't have enough time to travel to Hawai'i	18%	10%	14%
Hawai'i is too crowded	13%	8%	14%
I have heard/read that Hawai'i residents are opposed to visitors coming	NA	11%	13%
Hurricanes and tropical storms hitting Hawai'i	9%	8%	11%
Not sure which island(s) in Hawai'i to visit	9%	9%	10%
I can find higher quality entertainment at other destinations	NA	8%	10%
Accommodations were not available	9%	7%	10%
Have heard rental cars are limited or not available	NA	7%	10%
Hawai'i is not unique and different enough from other destinations	7%	6%	9%
Not enough activities in Hawai'i that interest me	NA	4%	7%
Hawai'i is not exotic enough	6%	5%	5%
Not enough dining option at a price point I can afford	NA	7%	4%
I do not feel comfortable visiting Hawai'i at this time due to the fires on Maui	NA	4%	3%

Hawai'i and Europe saw a significant increase in visitation from prospects in the past three years compared to other competitors.



Hawai'i Tourism Proprietary Questions

Data in bold indicates a significant difference from Summer 2024

Base: Likely Hawai'i Visitors (n=976)

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

Fourteen percent of all U.S. leisure travelers are likely to book a trip to Hawai'i in the next two years.

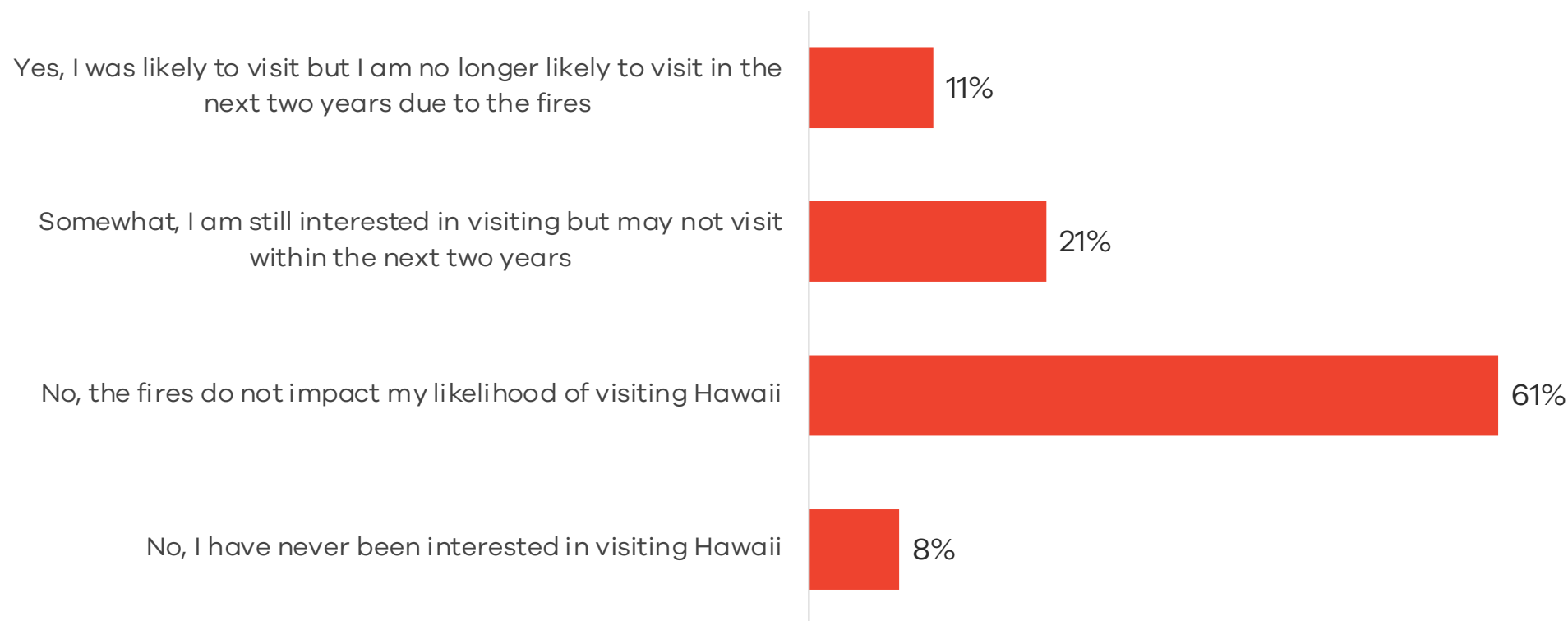
Destinations Most Likely to Book in the Next Two Years	U.S. Leisure Travelers	Air Travelers	Likely Hawai'i Visitors
Hawai'i	14%	13%	27%
Another U.S. state	38%	34%	23%
Europe	16%	20%	18%
Caribbean	11%	12%	9%
Asia	6%	7%	9%
Mexico	7%	7%	8%
Oceania	2%	3%	4%
Other	6%	4%	2%

Hawai'i Tourism Proprietary Questions

Data in bold indicates a significant difference from U.S. Leisure Travelers
Base: U.S. Leisure Travelers (n=3,546), Air Travelers (n=2,111), Likely Hawai'i Visitors (n=976)
Source: MMGY's 2025 *Portrait of American Travelers*® "Summer Edition"

Six in 10 (61%) air travelers stated that the Maui wildfires will not impact their likelihood to visit Hawai'i, with only 11% stating the wildfires as a primary reason for not visiting.

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

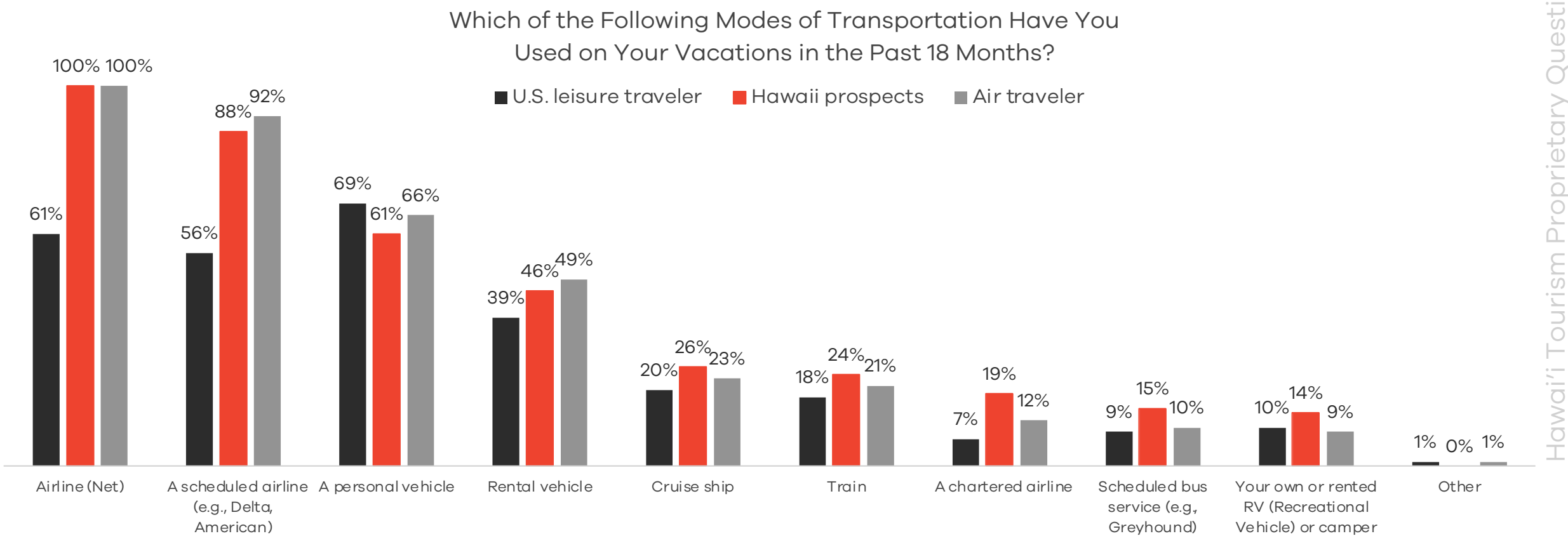


Data in bold indicates a significant difference from U.S. Leisure Travelers

Base: U.S. Leisure Travelers (n=3,546), Air Travelers (n=2,111), Likely Hawai'i Visitors (n=976)

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

Hawai'i prospects are most likely to have used a scheduled airline for their air travel in the past 18 months.



Data in bold indicates a significant difference from U.S. Leisure Travelers
Base: U.S. Leisure Travelers (n=3,546), Air Travelers (n=2,111), Likely Hawai'i Visitors (n=976)
Source: MMGY's 2025 *Portrait of American Travelers*® "Summer Edition"



The Hawai'i Prospect



Travel
Intelligence

Self-Described Personas

	U.S. Leisure Travelers	Likely Hawai'i Visitors
Beach lover	46%	54%
Foodie	39%	45%
Family traveler	35%	37%
Pet lover	36%	35%
Sports fan/enthusiast	28%	35%
World traveler	23%	34%
Travel bargain hunter	31%	32%
Outdoor adventurer	28%	31%
Wine enthusiast	20%	31%
Theme park enthusiast	22%	28%
Luxury traveler	18%	28%
Cruise lover	22%	27%
All-inclusive resort enthusiast	22%	25%
Conservative (politically)	24%	24%
Environmentally-conscious	20%	24%
Moderate (politically)	23%	23%
Concert/festival enthusiast	22%	23%
Liberal (politically)	18%	23%
Video game enthusiast	16%	23%
Cocktail enthusiast	17%	22%
Social justice activist	9%	15%
Golf enthusiast	9%	13%
Recreational cannabis user	11%	11%
Road warrior (business travel)	6%	11%
Ski/snowboard enthusiast	6%	10%

Base: U.S. Leisure Travelers (n=3,652), Likely Hawai'i Visitors (n=976)
Source: MMGY's 2025 *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	48%	53%
Female	50%	47%
Other	1%	0%
Gen Zers	17%	14%
Millennials	27%	40%
Gen Xers	25%	25%
Young Boomers	17%	16%
Older Boomers	11%	3%
Have children under 18 at home	31%	47%
White	75%	71%
Hispanic	17%	16%
African American/Black	14%	12%
Asian	7%	14%
Native American	1%	2%
Pacific Islander	1%	1%
Other	3%	2%

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%	3%
\$30,000–\$49,999	12%	5%
\$50,000–\$74,999	16%	11%
\$75,000–\$99,999	12%	11%
\$100,000–\$124,999	9%	11%
\$125,000–\$149,999	10%	15%
\$150,000–\$249,999	19%	32%
\$250,000–\$499,999	5%	9%
\$500,000 or more	2%	3%
4 years or less of high school	38%	20%
1–3 years of college	26%	23%
4 years of college	22%	34%
Some graduate school	3%	4%
Graduate/professional degree	10%	20%

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

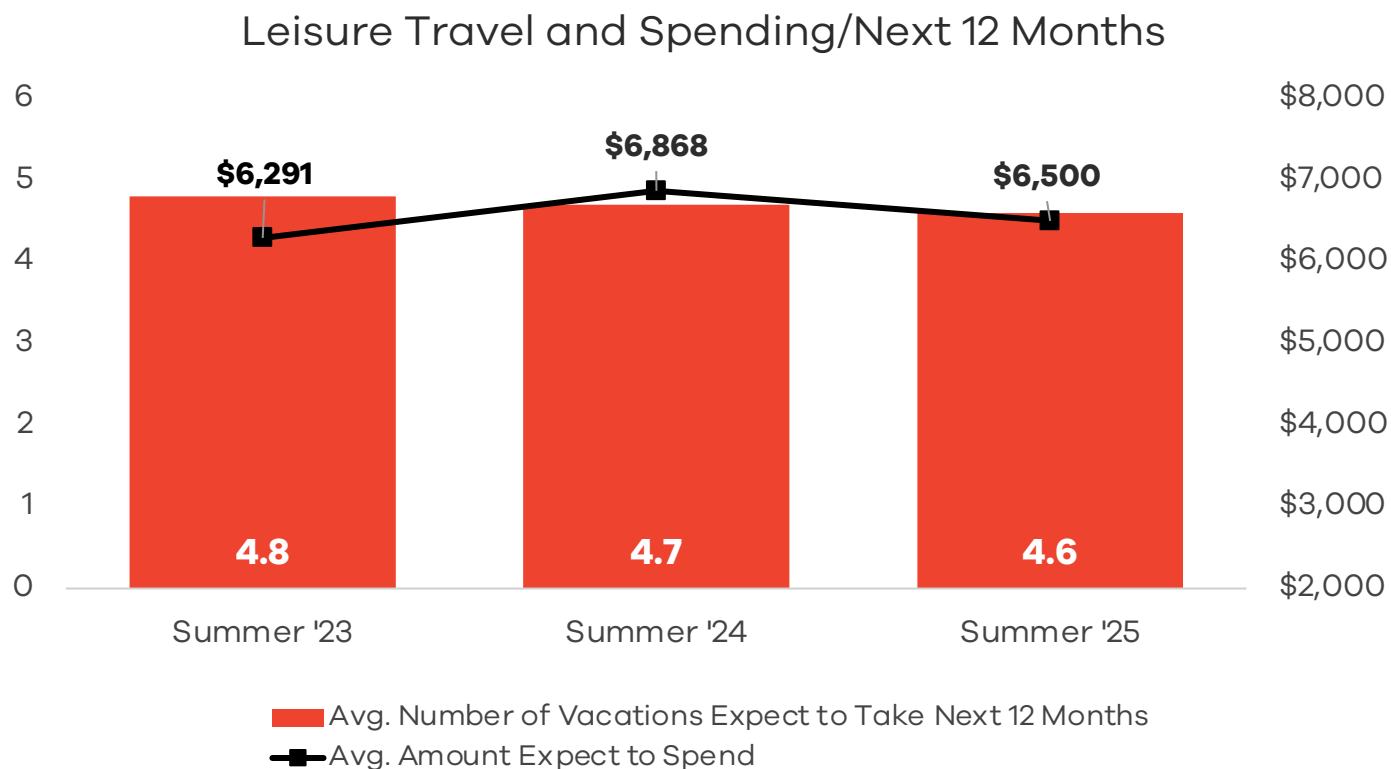
Demographics

	U.S. Leisure Travelers	Likely Hawai'i Visitors
South	39%	31%
West	24%	35%
Midwest	20%	18%
Northeast	17%	16%
Employed (full or part-time)	59%	80%
Retired	24%	14%
Temporarily unemployed	7%	2%
Homemaker (full-time)	6%	3%
Student	4%	2%
Married/living together	61%	74%
Never married	26%	18%
Divorced/separated/widowed	14%	8%

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

Travel Outlook Snapshot

Travel intentions have dipped slightly from Summer 2024.



/ Hawai'i prospects are planning to spend and take slightly less vacations over the next 12 months, compared to Summer 2024.

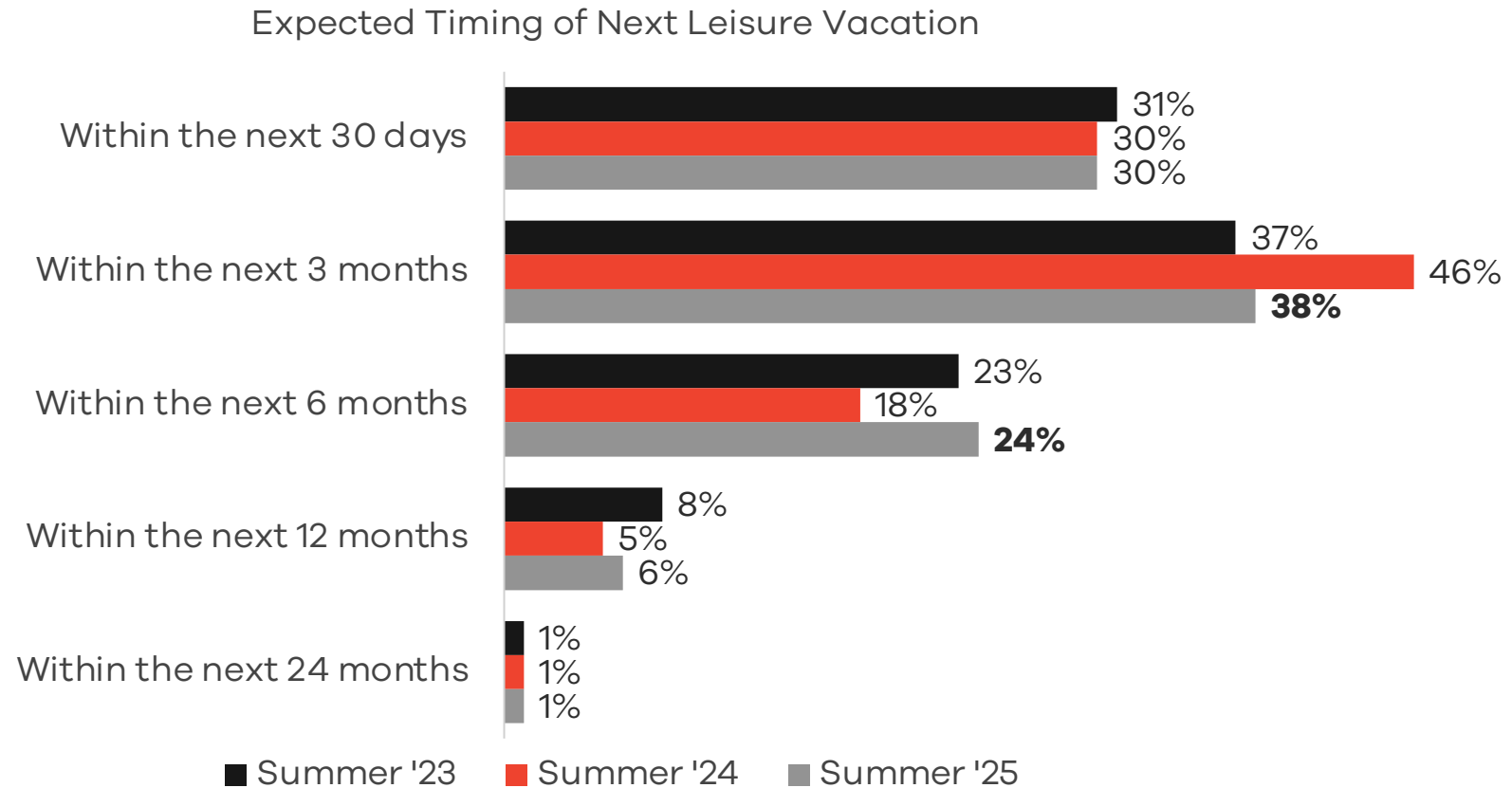
/ Despite this, overall spending remains significantly higher than the average U.S. leisure traveler (\$4,699 vs. \$6,500), who have also seen a dip in travel intentions.

Traveler Intentions: Over Time

Base: Likely Hawai'i Visitors & Planning to Take a Trip in the Next 12 Months (n=965)

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

Prospects are looking further ahead when planning their next leisure vacation compared to 2024.



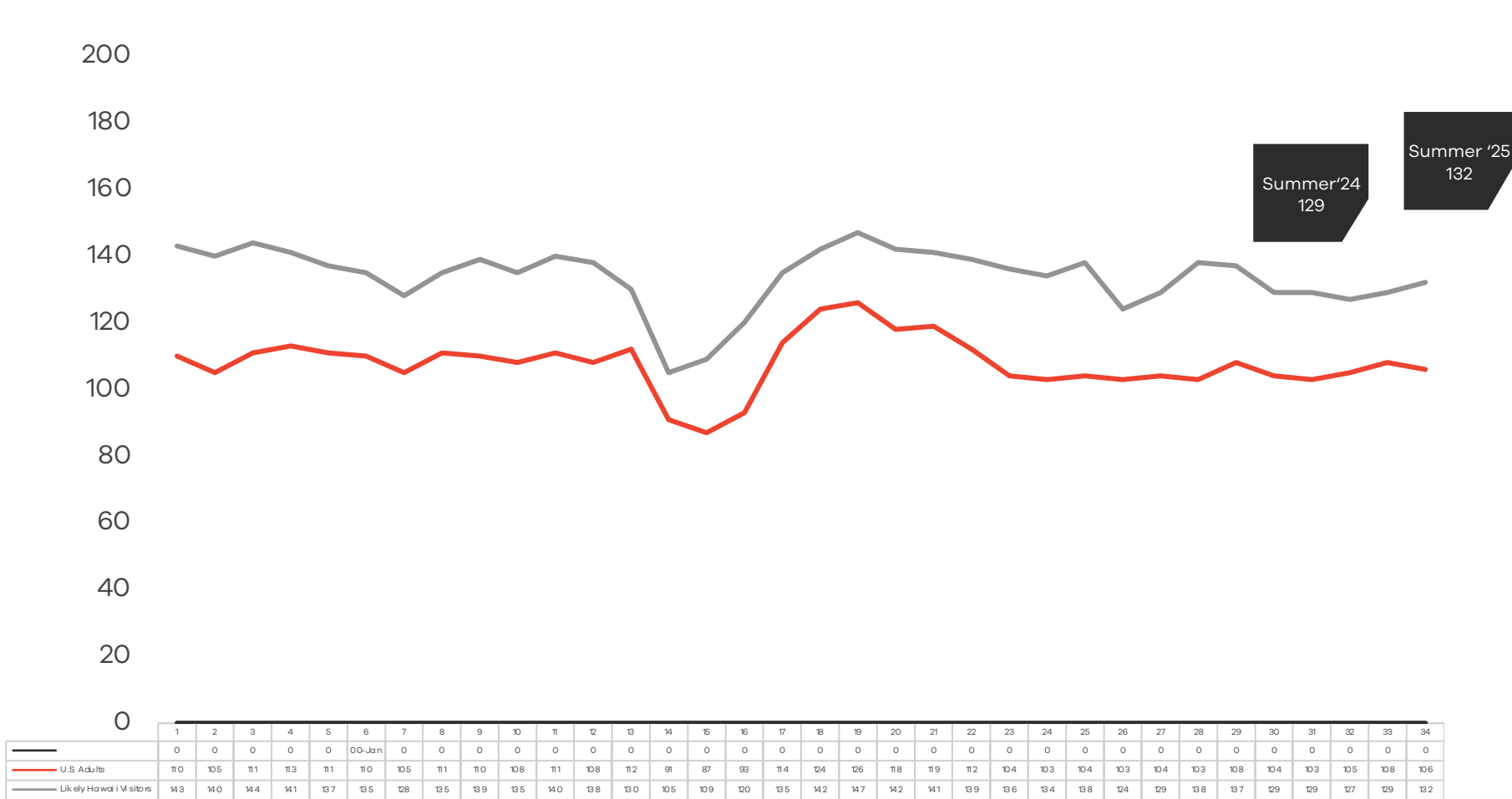
Traveler Intentions: Over Time

Data in bold indicates a significant difference from Summer 2024.

Base: Likely Hawai'i Visitors (n=976)

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

Overall Traveler Sentiment Score: Slight increase from this time last year.

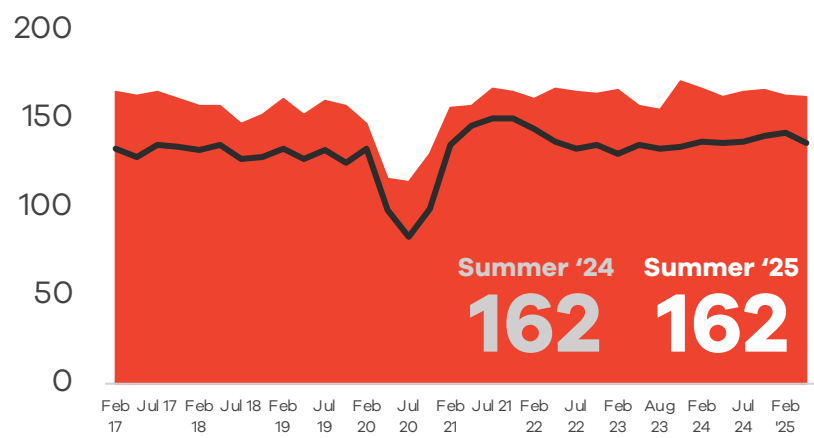


The Traveler Sentiment Score consists of six variables, including: interest in travel, time available for travel, personal finances available for travel, affordability of travel, quality of service and safety of travel. It provides a glimpse into how U.S. adults are feeling about travel this year compared to the same time a year ago. MMGY has calculated and reported the TSI quarterly since March 2007.

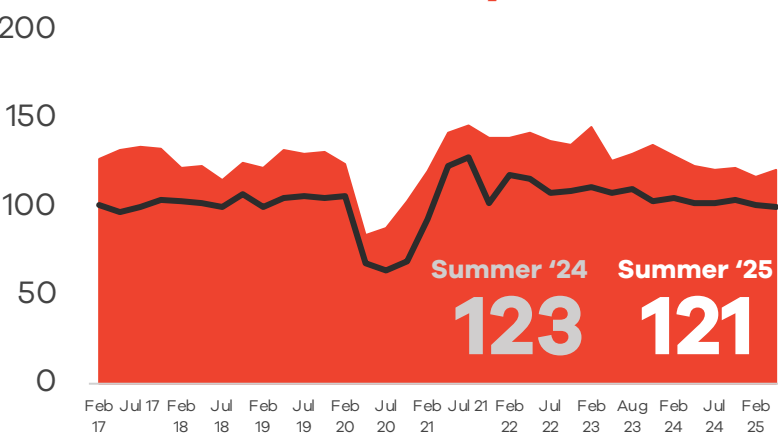
Traveler Sentiment Index™

Compared to Summer 2024, travel sentiment among Hawaii prospects has risen in many categories, especially perceptions of travel's quality of service.

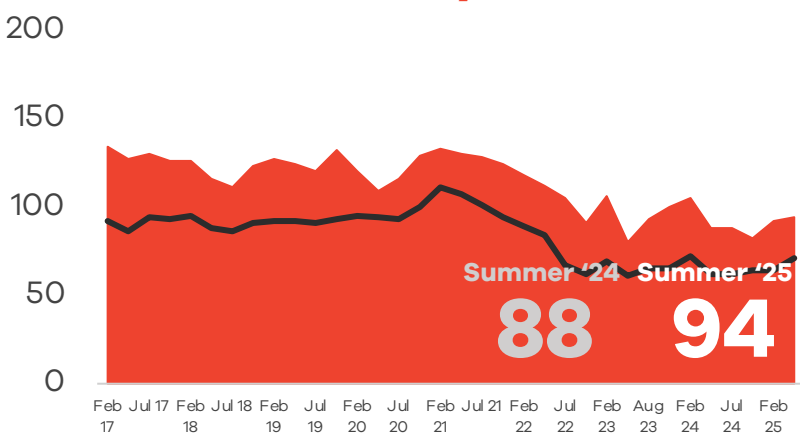
Interest in Travel



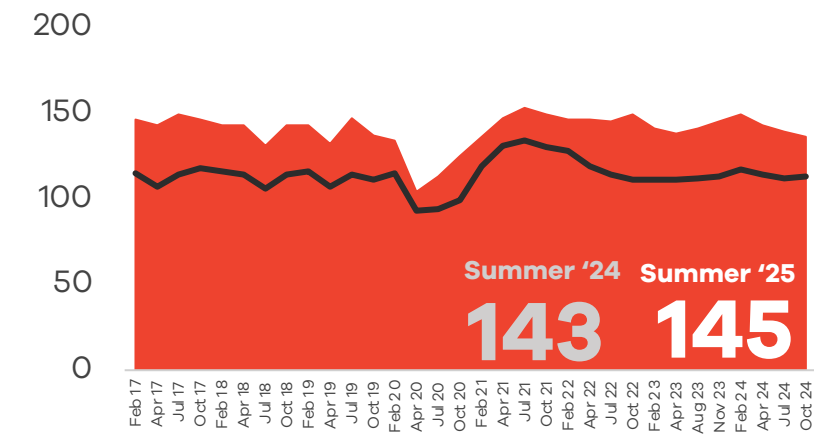
Perceived Safety of Travel



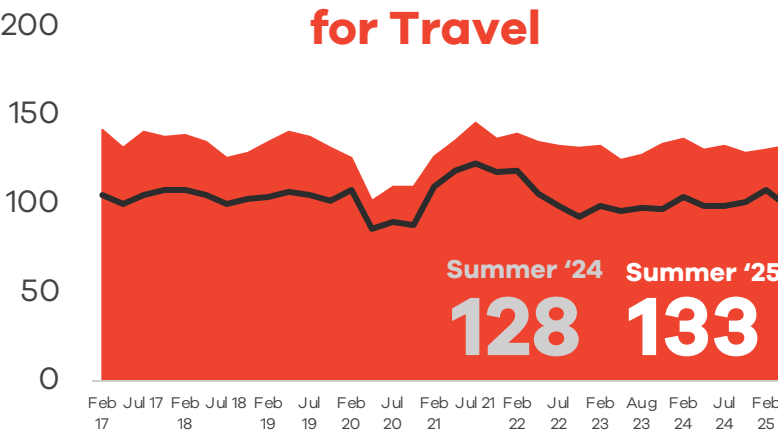
Affordability of Travel



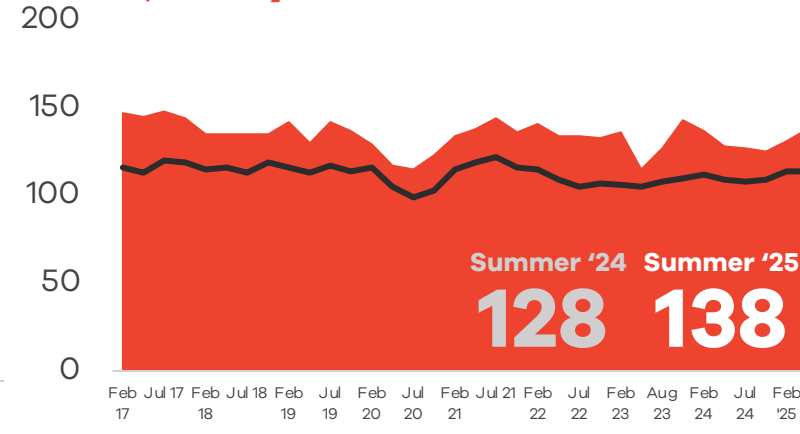
Time Available for Travel



Personal Finances Available for Travel



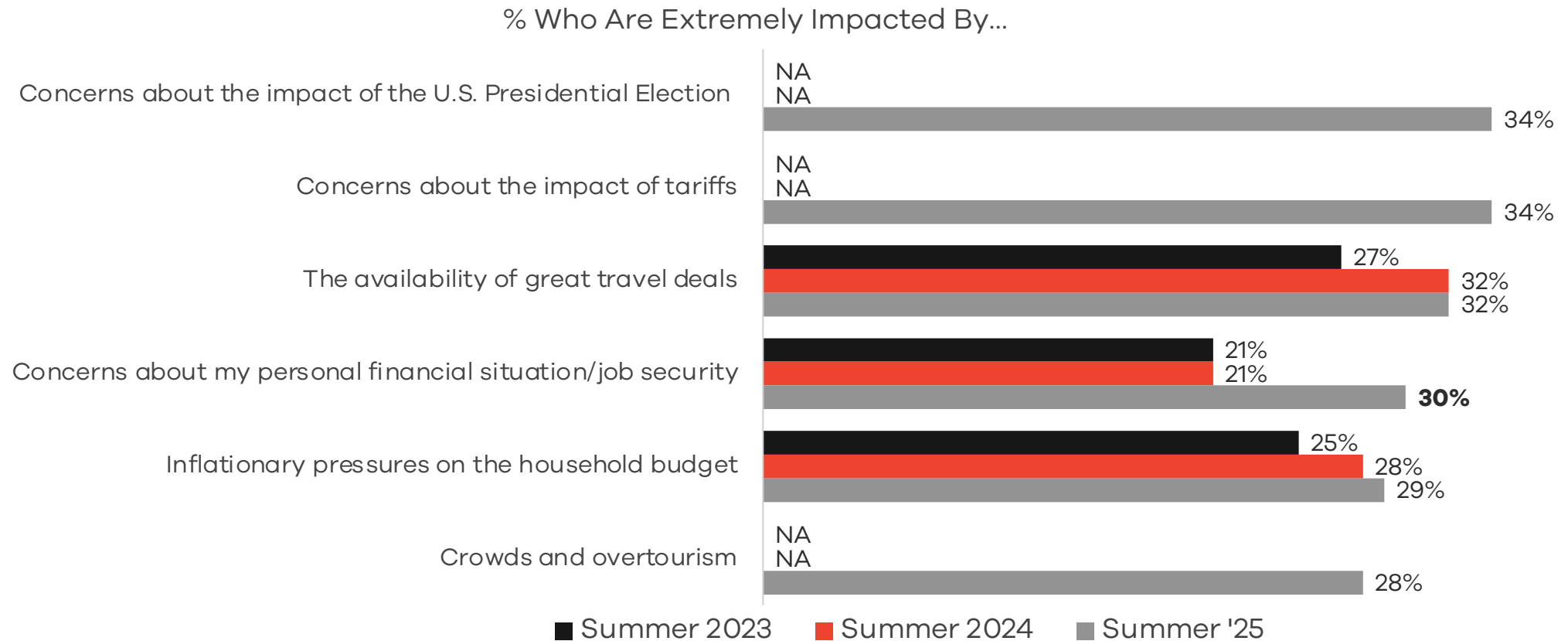
Quality of Service of Travel



Traveler Sentiment Index™

Base: U.S. Adults (n=4,509) (Black line) & Likely Hawai'i Visitors (n=976) (Red fill)
Source: MMGY's 2025 *Portrait of American Travelers*® "Summer Edition"

Tariffs, the impact of the president and the availability of great travel deals are impacting prospects more than anything else in Summer 2025.



Barriers To Travel

Data in bold indicates a significant difference from Summer 2024.

Base: Likely Hawai'i Visitors (n=976)

Source: MMGY's 2025 *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	Summer '23	Summer '24	Summer '25
California	65%	74%	75%
Florida	67%	73%	70%
Colorado	61%	70%	68%
Alaska	63%	67%	67%
New York	59%	65%	66%
Nevada	57%	60%	61%
Arizona	54%	62%	60%
Texas	48%	57%	58%
Georgia	43%	46%	51%
Washington	48%	54%	51%
North Carolina	43%	48%	49%
South Carolina	41%	44%	47%
Montana	38%	47%	46%
Oregon	40%	47%	46%
Utah	35%	41%	46%
Maine	36%	49%	45%
New Mexico	36%	43%	44%
Tennessee	42%	46%	44%
Louisiana	38%	43%	42%
Massachusetts	35%	44%	42%

San Diego and New York City are the top destinations, outside of Hawai'i, for prospective visitors.

Top 20 Destinations of Interest	Summer '23	Summer '24	Summer '25
Island of Hawai'i (aka Big Island)	83%	82%	81%
Maui, HI	80%	82%	79%
Kaua'i, HI	78%	80%	77%
Honolulu, HI (including Waikiki)	82%	81%	77%
San Diego, CA	59%	65%	68%
New York City, NY	61%	65%	67%
Las Vegas, NV	66%	66%	67%
Lanai, HI (2023+)	69%	70%	66%
Florida Keys/Key West, FL	64%	66%	65%
Napa Valley, CA	50%	60%	60%
Orlando, FL	58%	61%	59%
Los Angeles, CA	52%	57%	59%
San Francisco, CA	51%	60%	58%
Miami, FL	55%	62%	58%
Washington, DC	45%	56%	56%
New Orleans, LA	51%	56%	55%
Palm Beach, FL	50%	56%	54%
Niagara Falls, NY	50%	57%	53%
Denver, CO	44%	58%	53%
Tampa/St. Petersburg/Clearwater, FL	57%	55%	52%

Destinations of Interest

Base: Likely Hawai'i Visitors (n=976)

Source: MMGY's 2025 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	Summer '23	Summer '24	Summer '25
Europe	53%	61%	59%
The Caribbean	47%	47%	42%
Canada	40%	41%	38%
Mexico	34%	38%	35%
Asia	25%	29%	32%
Oceania	18%	27%	25%
South America	21%	22%	28%
Central America	19%	22%	21%
Africa	11%	12%	13%
Middle East	9%	11%	10%

Destinations of Interest

Base: Likely Hawai'i Visitors (n=976)

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

Summer Module

Road Trips



Road trips are popular among Hawai'i prospects, with more of these travelers taking a road trip in the past year compared to 2024.



of Hawai'i Prospects have taken a road trip during the past 12 months



of Hawai'i Prospects intend to take a road trip during the next 12 months

Motivation For Past or Future Road Trips

	USLT 2025	HP 2024	HP 2025
Ability to explore multiple places on a single trip	46%	53%	48%
Ability to be spontaneous while traveling	44%	49%	49%
Thrill of making discoveries on the road	36%	42%	39%
Ability to pack everything needed for vacation in the car	39%	50%	40%
Lower vacation costs	33%	35%	32%
Ability to take vacation at the last minute	29%	34%	35%
Nostalgia for past road trip vacations	26%	27%	27%
Ease in taking pets along	14%	25%	17%
None of the above	6%	3%	3%

- / The ability to be spontaneous is the most appealing aspect of road trips for almost half (49%) of Hawai'i prospects.
- / Being able to pack everything needed for the vacation is less important to prospects compared to 2024, indicating that these travelers are planning to travel with less physical items in pursuit of a more spontaneous vacation.

Prospects are planning to drive slightly further, visit more cities and believe they will be impacted by tariffs more so than U.S. leisure travelers.

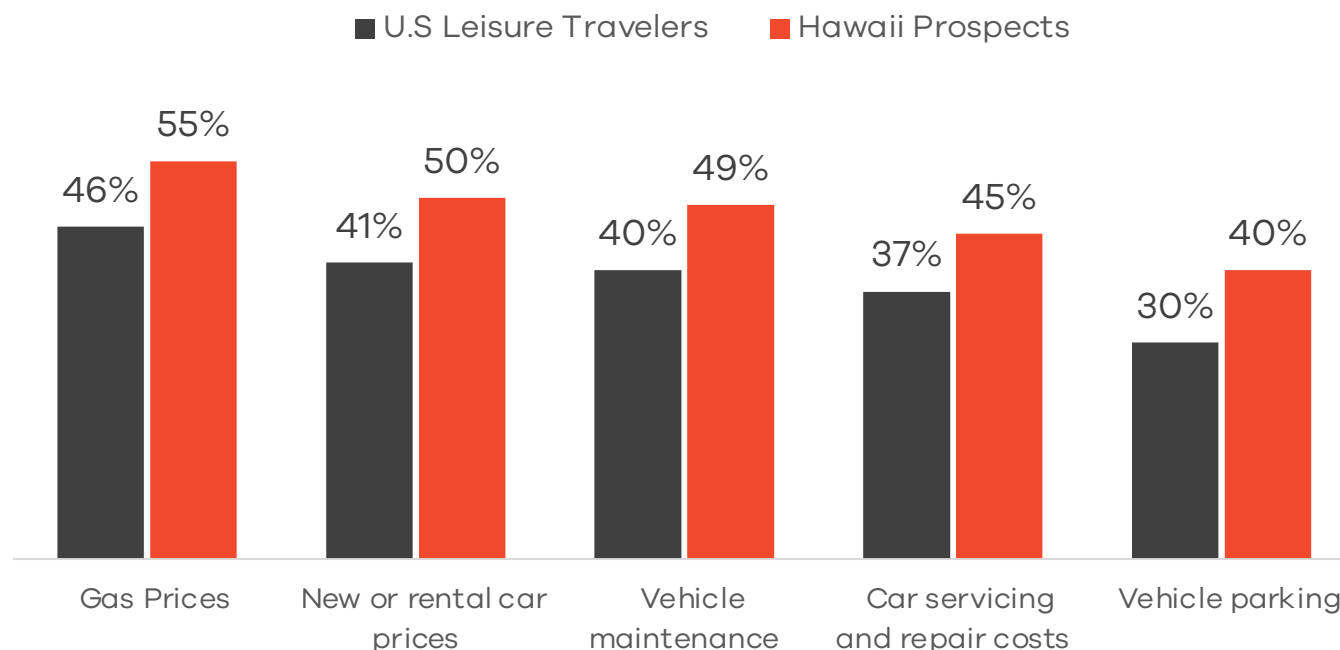
3.5

Average number of cities/places Hawai'i Prospects intend to visit on their next road trip
(vs. 3.2 among U.S. Leisure Travelers)

990

Average number of miles Hawai'i Prospects are willing to drive on their next road trip
(vs. 980 among U.S. Leisure Travelers)

What road trip costs will be impacted by tariffs?



Road Trips

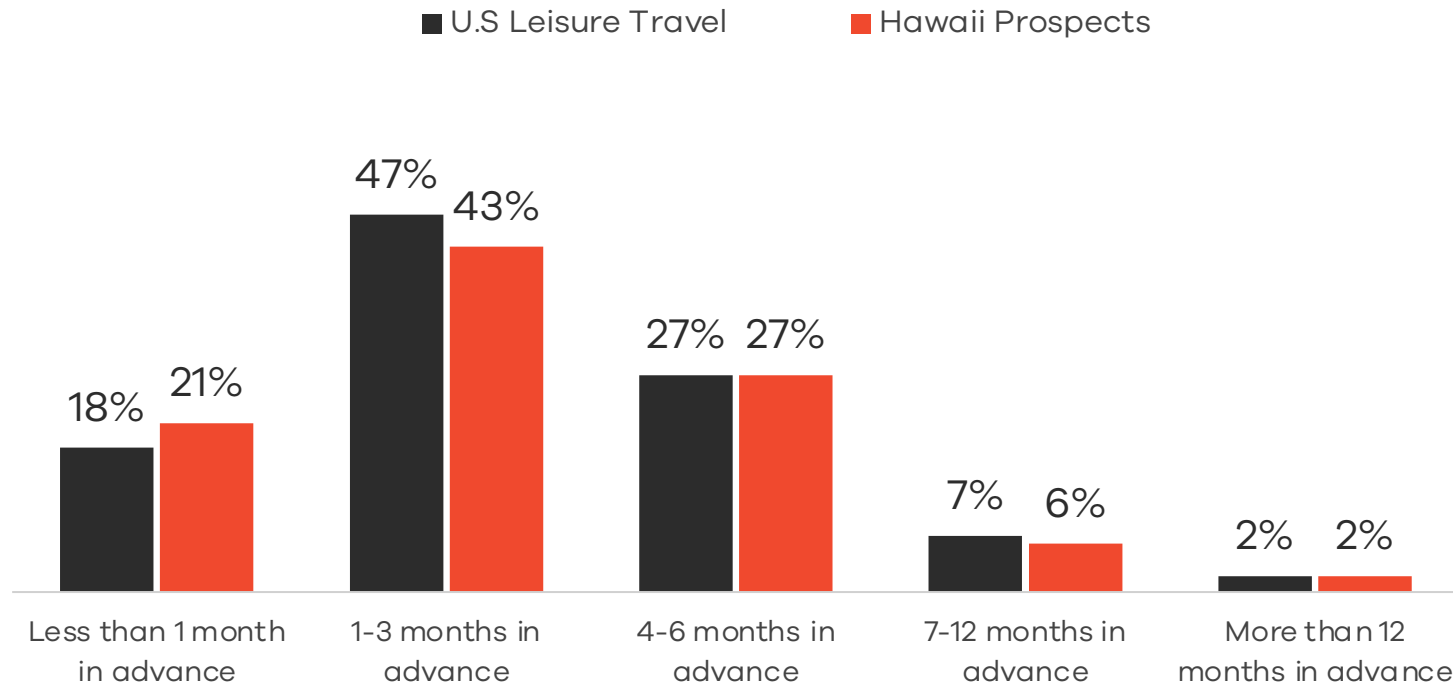
Data in bold indicates a significant difference from U.S. Leisure Travelers.

Base: Plan to take a road trip (n=2,825) & Likely Hawai'i Visitors (n=813)

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

The Pacific Coast Highway, with 1 in 3 (32%) prospects planning to travel it, is the most popular road trip route.

Number of Months in Advance Road Trip Is Planned



Most popular road trip routes:

1. Pacific Coast Highway (32%)
2. Route 66 (23%)
3. Overseas highway (22%)
4. Texas Hill Country (21%)
5. Blue Ridge Parkway (19%)

Road Trips

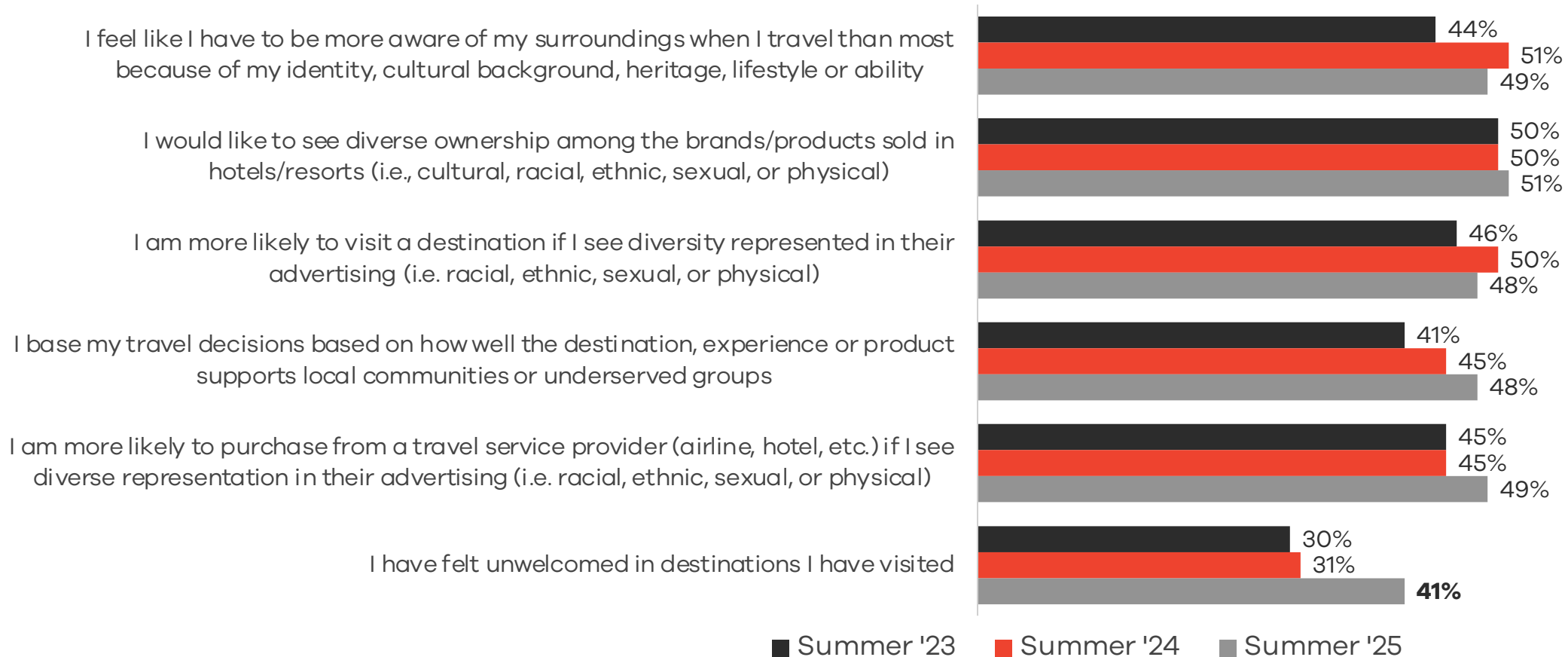
Summer Module

Diversity in Travel



Significantly more Hawai'i prospects have felt unwelcomed in destinations compared to the previous two years.

Diversity Statements: % Agree



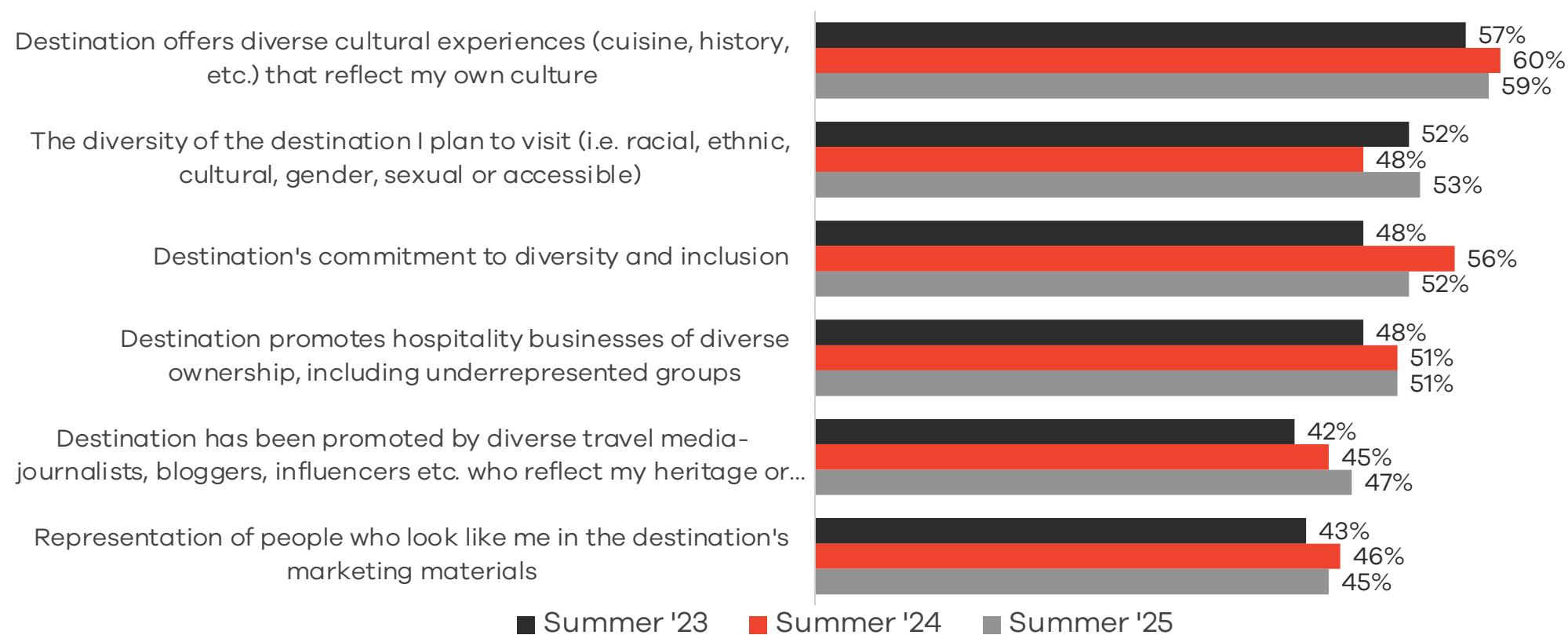
Data in bold indicates a significant difference from Summer '23

Base: Likely Hawai'i Visitors (n=976)

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

Diversity within destinations has become more important to prospects than a destinations commitment to diversity and inclusion, although both factors remain significant.

Influential Factors When Choosing a Leisure Destination



Diversity in Travel

42% 2024 49% 2025

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

53% 2024 62% 2025

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

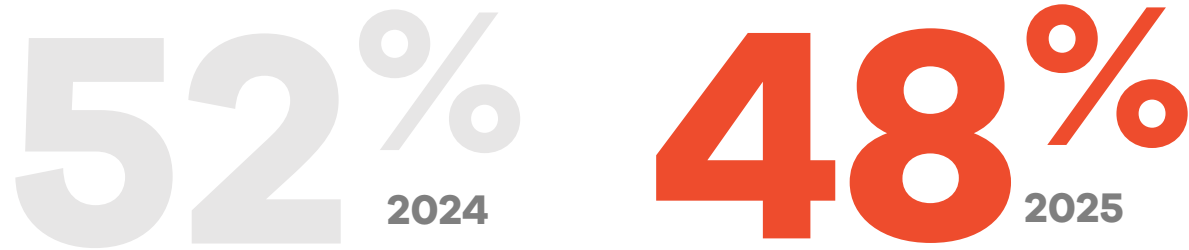
Hawai'i prospects believe there are more inequities in the travel industry compared to Summer 2024. They also believe the industry is making positive strides to address these inequities.



Summer Module

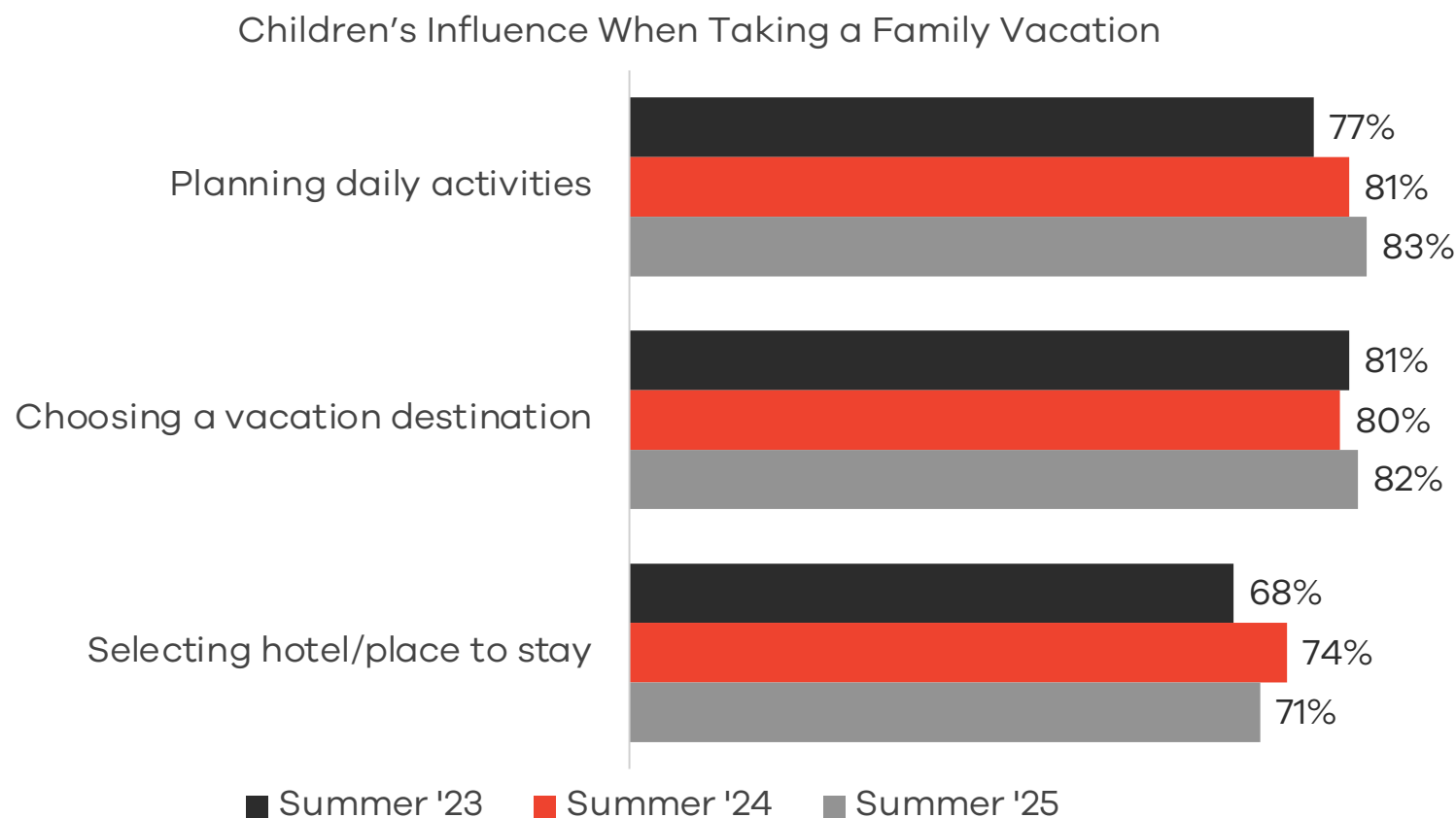
Family Travel

Family travel is essential to prospects, with around half (48%) of likely Hawai'i visitors planning to travel with their children in the next 12 months.



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

Children's impact in travel planning decisions continues to grow, with a higher proportion now involved in planning daily activities and the vacation destination itself than previous years.



Family Travel

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

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

Multigenerational family travel is a significant driver for prospects, with over 4 in 10 planning to take a multigenerational trip in the next 12 months.

42%
2024

42%
2025

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

Family Travel

Traveling For Children's Sporting/Academic Events

51%
2024

47%
2025

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

Type of Activity*	U.S. leisure traveler	Likely Hawai'i visitor
Sporting events	33%	42%
Performing arts and music events	24%	34%
Cultural and heritage events	22%	32%
Summer Camp	23%	30%
Talent shows	20%	30%
Academic competition/camp	16%	24%
College preparatory events	15%	22%

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)

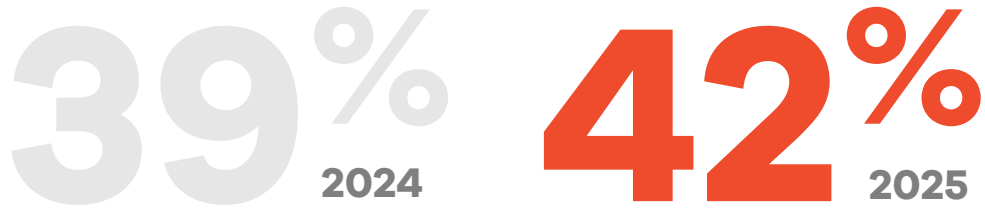
Source: MMGY's 2025 *Portrait of American Travelers*® "Summer Edition"



Summer Module

Travel Advisors

Traditional travel agents have seen a solid increase in popularity in Summer 2025.



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

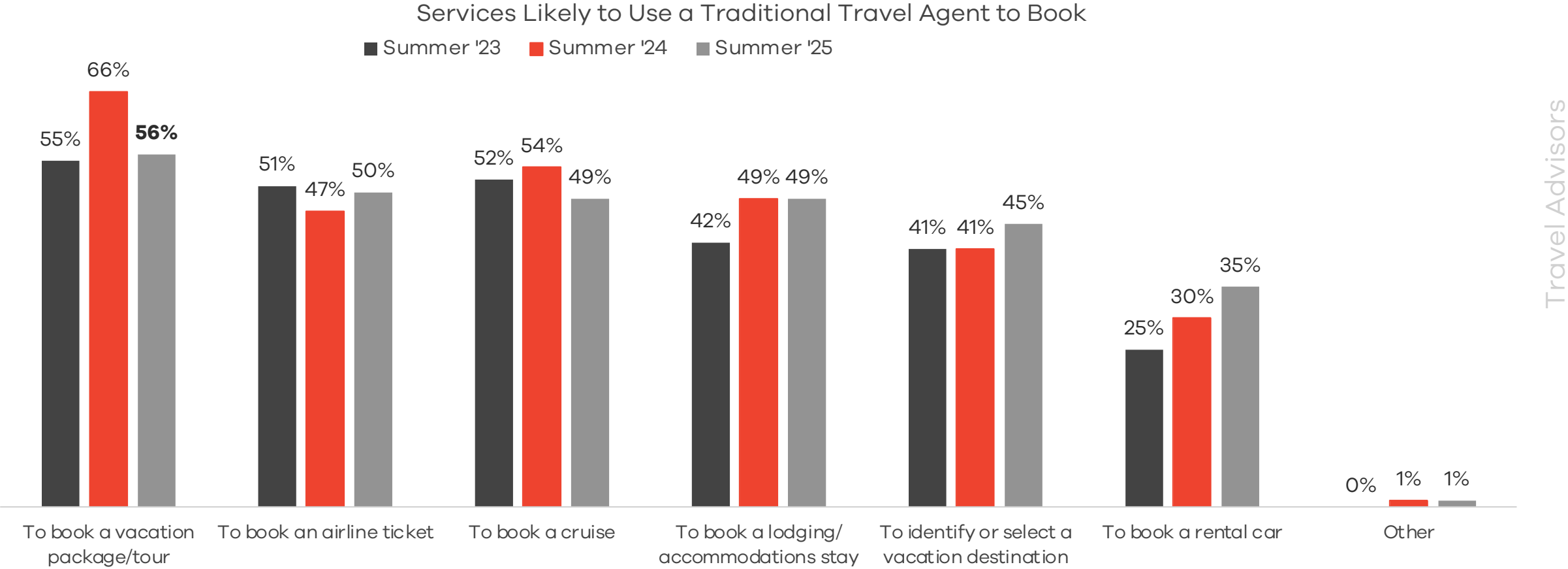


of likely Hawai'i visitors plan to use the services of a travel advisor during the next 2 years

Base: Likely Hawai'i Visitors (n=976)

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

More prospects are using a travel agent to book rental cars, and significantly less are using them to book a vacation package/tour compared to Summer 2025.




Data in bold indicates a significant difference from Summer 2024.
Base: Plan to use a traditional travel agent & Likely Hawai'i Visitor (n=555)
Source: MMGY's 2025 *Portrait of American Travelers*® "Summer Edition"

Likely Hawai'i visitors are most likely to use traditional travel agents to get the best prices for vacation.

Reasons to Use a Traditional Travel Agent	Summer '23	Summer '24	Summer '25
To get the best prices for a vacation	52%	48%	48%
To have peace of mind that what I'm booking is the experience I expect it will be	46%	55%	44%
To take the time and hassle out of researching and booking travel	50%	50%	42%
To gain access to experiences I can't get on my own	42%	48%	40%
They provide help if things go wrong	50%	44%	35%
To get recommendations on the hottest/trending places to visit	39%	41%	34%
Other	1%	3%	3%

Data in bold indicates a significant difference from Summer 2024.

- / Peace of mind and less time and hassle have become less important than cost savings as reasons to use a traditional travel agent among Hawai'i prospects.
- / Tighter economic conditions and a desire to get more for their money has driven more of these travelers to travel agents in the hope of lower prices, bundled deals or overall better value for their money.

A close-up photograph of a person's hand using metal tongs with black rubberized grips to place a pile of dried cannabis buds onto a small, round, stainless steel scale. To the left of the scale is a clear glass jar filled with more cannabis buds. The background is slightly blurred, showing a person wearing a dark long-sleeved shirt. The overall lighting is bright and clinical.

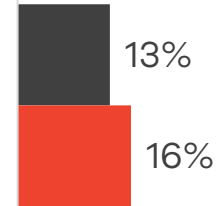
Summer Module

Cannabis Tourism

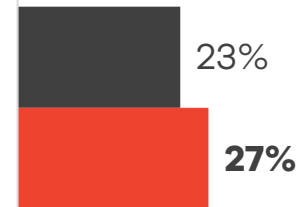


Interest in Cannabis-Related Activities While Traveling

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.



■ U.S. Leisure Travelers ■ Likely Hawai'i Visitors

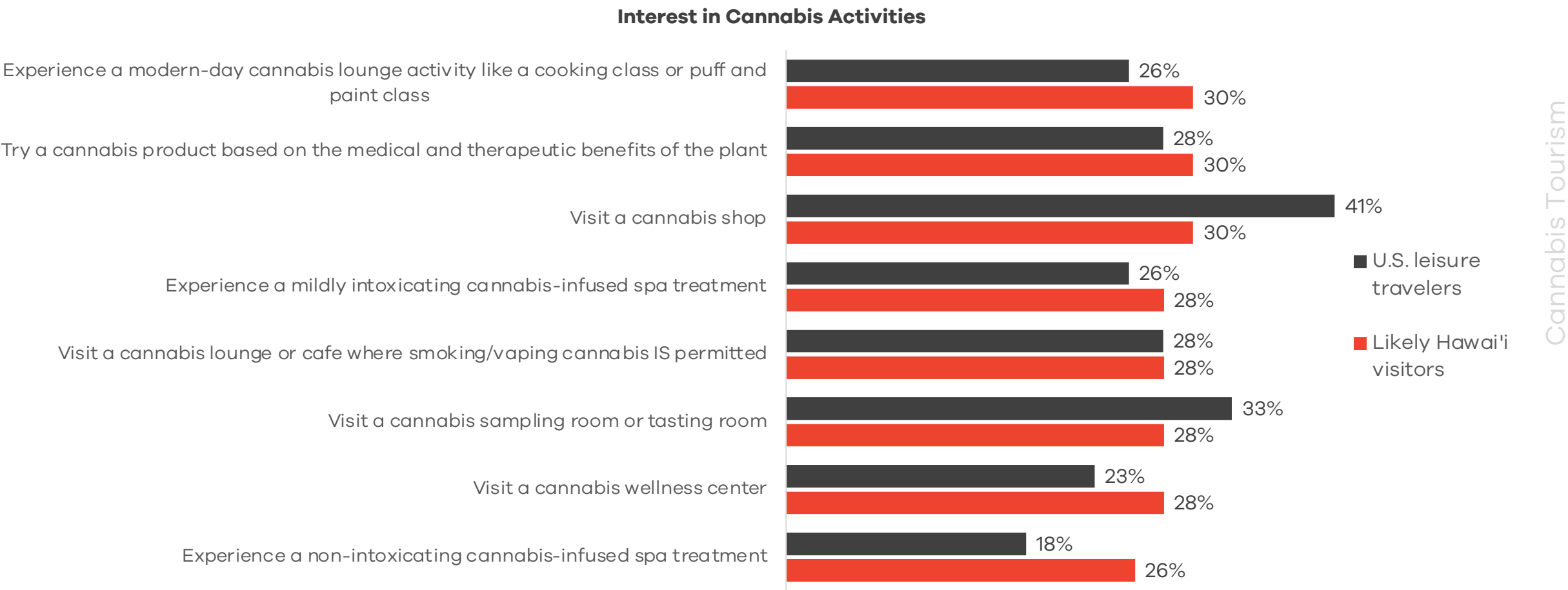
Cannabis Tourism

Base: U.S. Leisure Travelers (n=3,546); Likely Hawai'i Visitors (n=976)

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

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

Visiting a cannabis shop is a significantly more popular activity for U.S. leisure travelers compared to likely Hawai'i visitors.



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

46%

Of Hawai'i prospects are interested in experiencing intoxicating cannabis effects (vs. **39%** of U.S. leisure travelers)

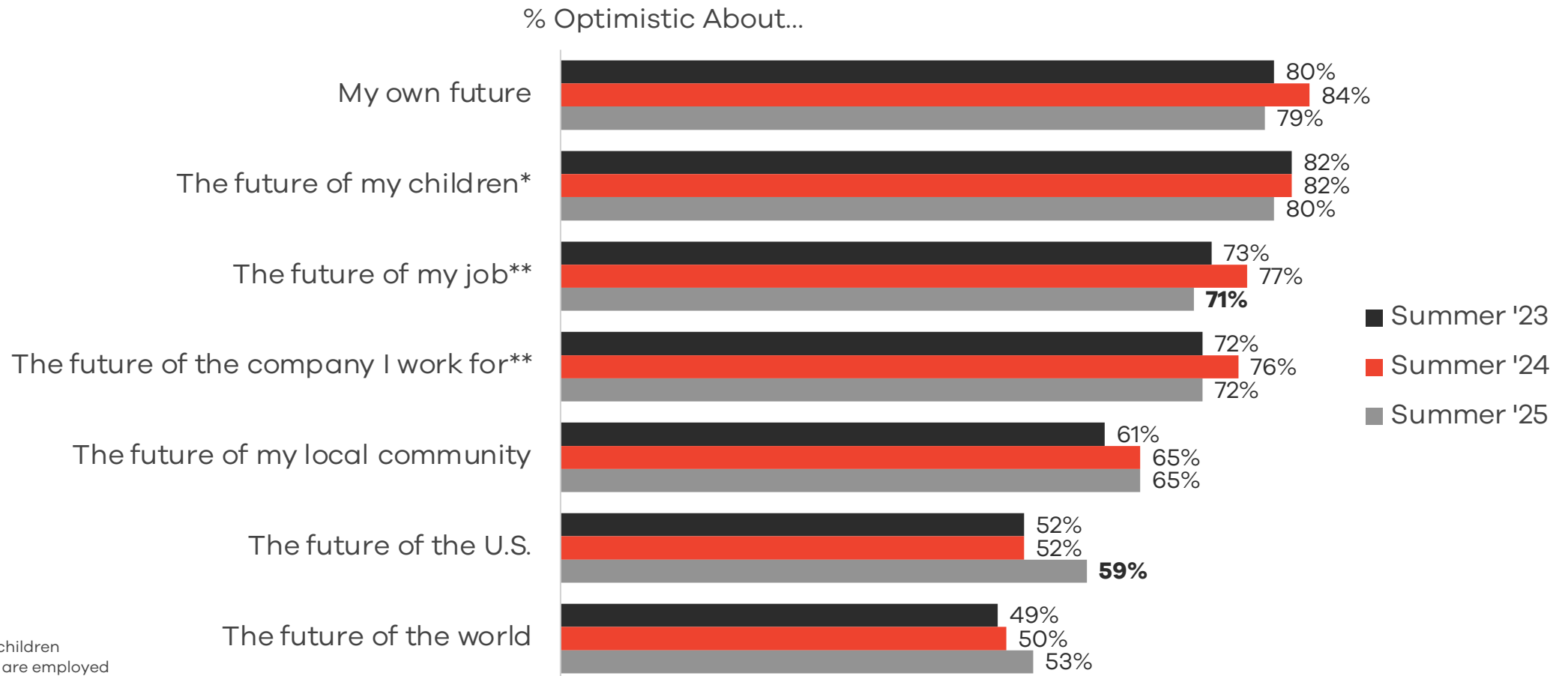
Interest in Cannabis Effects (among those who are interested in experiencing intoxicating cannabis effects)	U.S. Leisure Travelers	Likely Hawai'i Visitors
Experiencing cannabis effects that complement and enhance art experiences like mural walks, theater, and live music performances.	33%	41%
Experiencing cannabis effects that complement and enhance food experiences like fine-dining or sampling local signature dishes.	31%	39%
Feeling mild intoxicating cannabis effects while on vacation.	36%	37%
Feeling medium intoxicating cannabis effects while on vacation.	31%	35%
Only interested in non-intoxicating cannabis and hemp activities and experiences while on vacation.	23%	33%
Interested in feeling strong intoxicating cannabis effects while on vacation.	28%	30%
Interested in experiencing cannabis effects that complement and enhance nature experiences like a hike in the redwoods or a day at the beach.	26%	26%
All of the above.	8%	7%

A person wearing a red hat and dark clothing stands in a desert canyon at night, positioned between two illuminated geodesic dome tents. The tents are glowing from within, casting a warm light on the surrounding sand. The canyon walls are high and rugged, with a starry night sky visible above. The overall scene is serene and adventurous.

*Summer
Module*

**Traveler
Perspectives**

More likely Hawai'i visitors are feeling optimistic about the future of the U.S. and the world compared to the previous two years.



* Among those with children

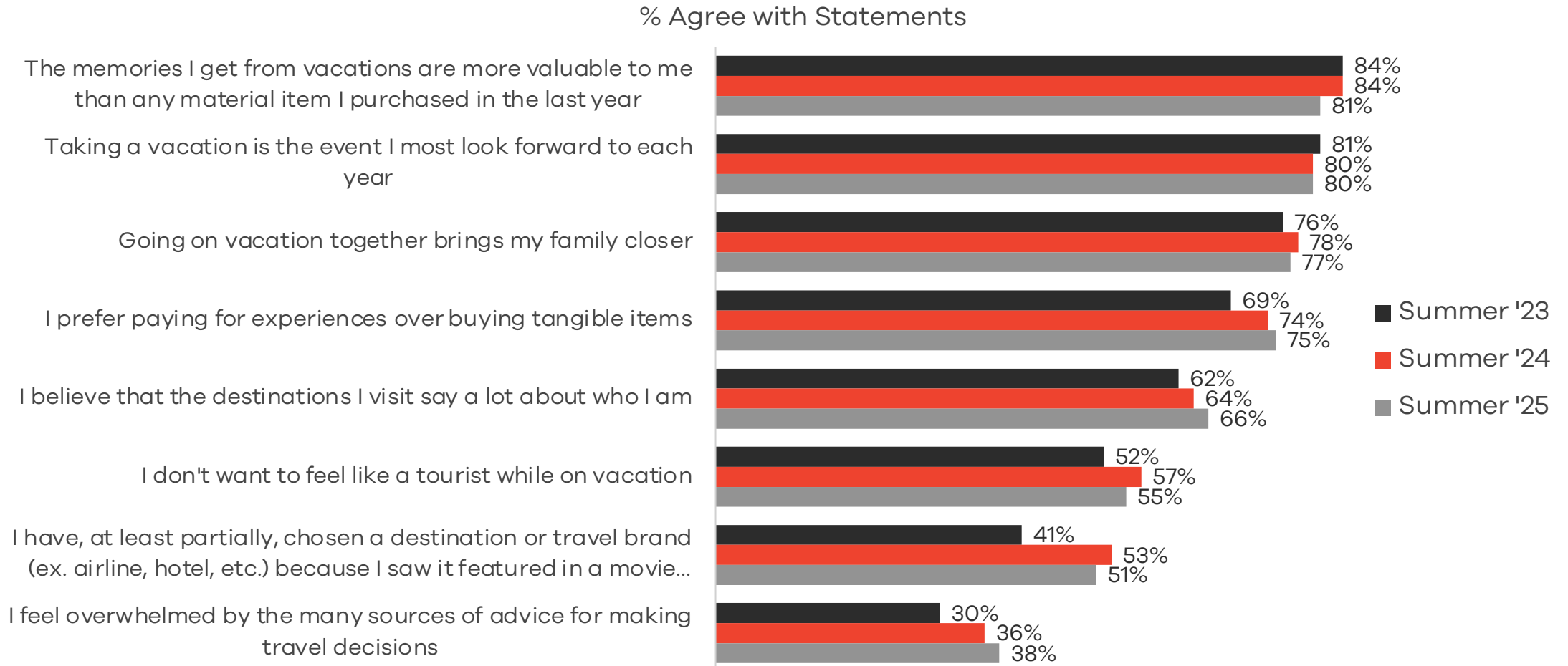
** Among those who are employed

Data in bold indicates a significant difference from Summer 2024.

Base: Likely Hawai'i Visitors (n=976)

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

Making memories is the most important aspect of vacations for likely Hawai'i visitors.



Luxury Travel

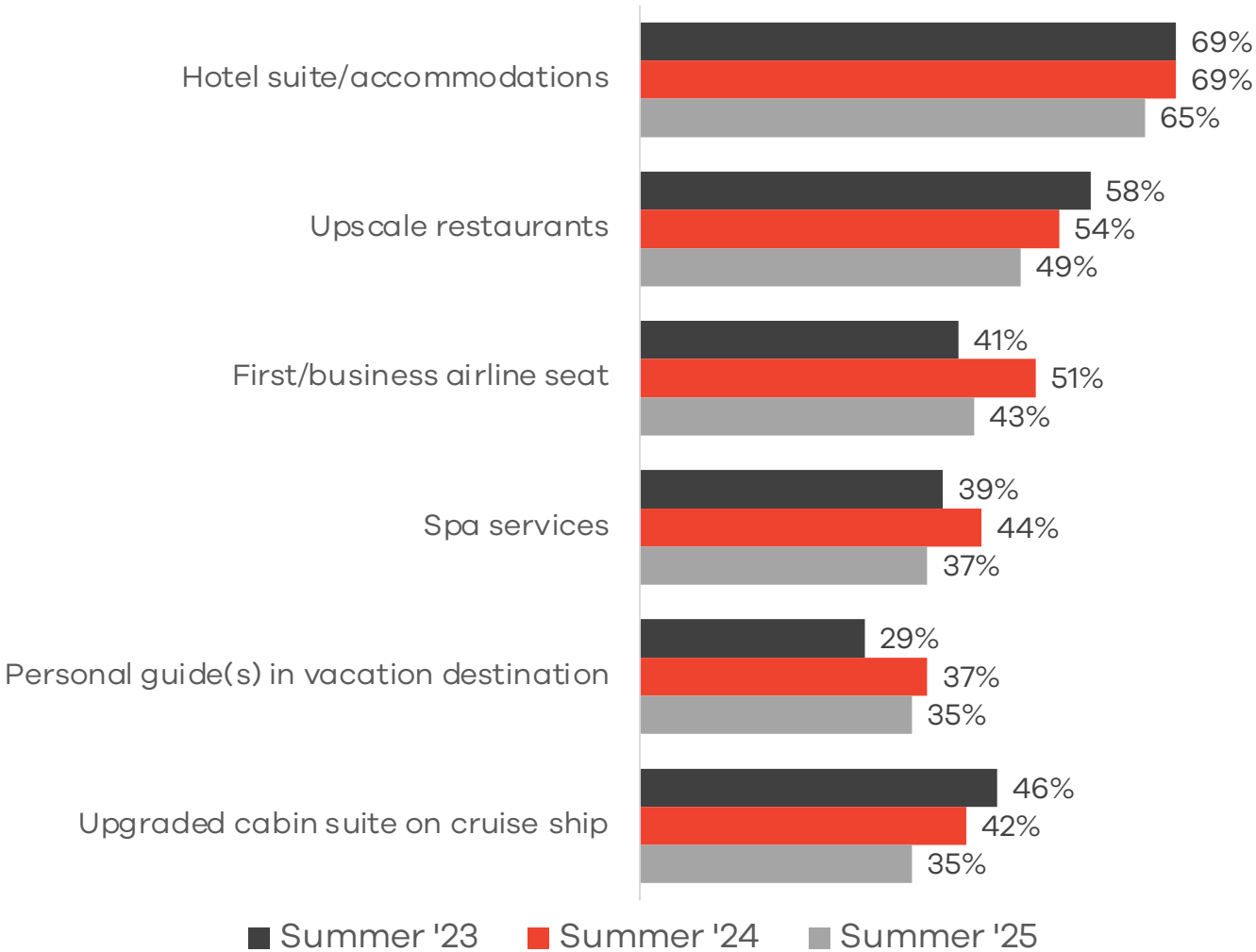
68%
2025

Agree: **I enjoy being treated like a VIP.**
(vs. 72% in 2024)

53%
2025

Agree: **I consider myself to be a luxury traveler.**
(vs. 49% in 2024)

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



Traveler Perspectives

A vintage photograph of a lake with mountains in the background and people in a canoe. The scene is set on a calm body of water, likely a reservoir or a large lake, with a range of rugged, snow-capped mountains in the distance. The sky is filled with soft, white clouds. In the foreground, a small wooden canoe with two people inside is visible. One person is leaning over the side of the canoe, and the other is sitting. A small, light-colored object, possibly a surfboard or a small boat, is floating in the water to the left of the canoe. The overall tone of the image is nostalgic and serene.

Vacation Motivators and Activities

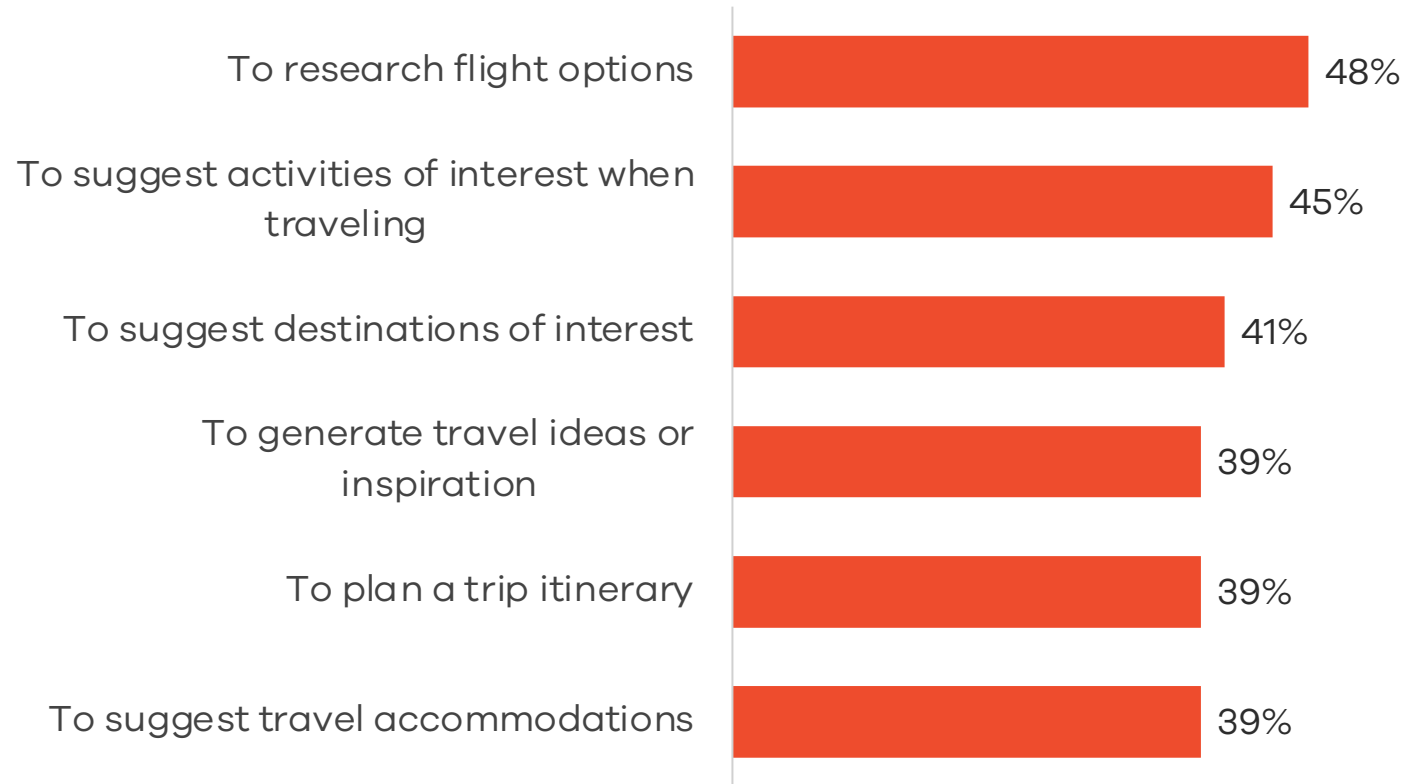
Almost 2 in 3 (64%) Hawai'i prospects have used AI tools for travel planning, a significant increase on previous years and U.S. leisure travelers.

64%

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

(vs. 42% of US Leisure Travelers)

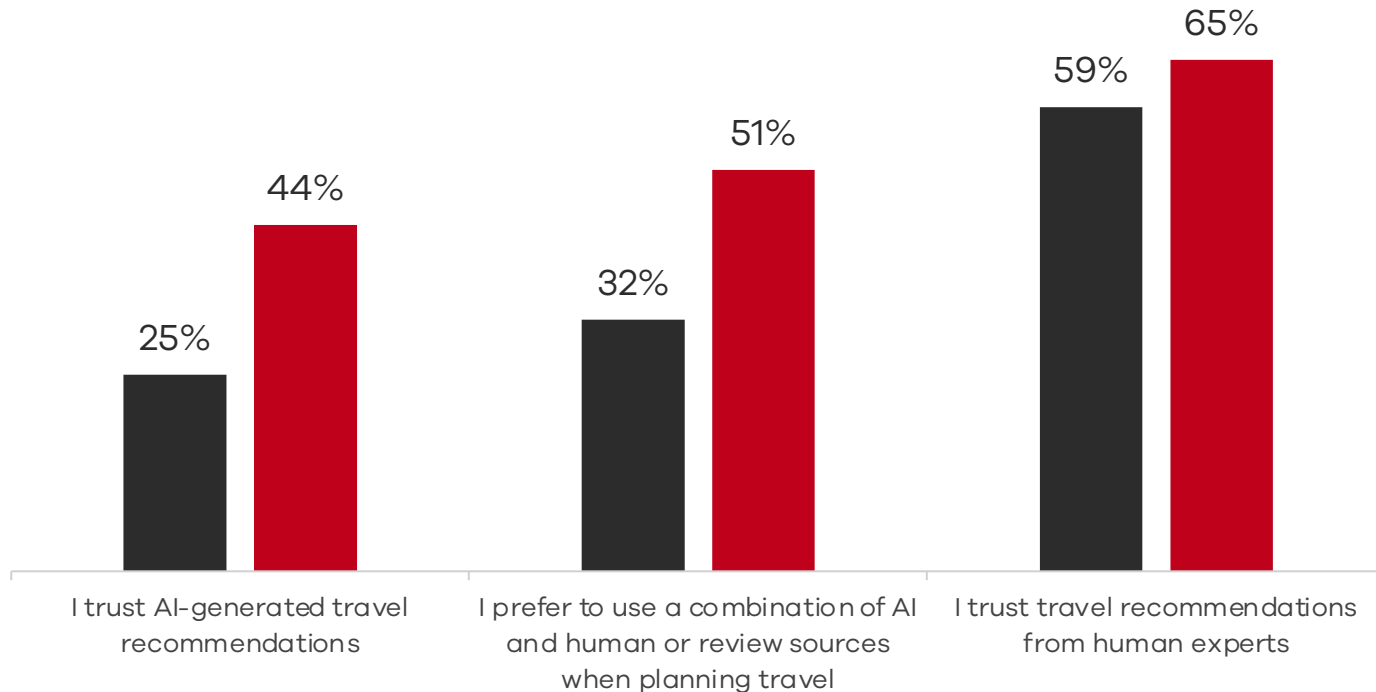
AI Use for Travel Planning
(Among those who have used AI for travel planning)



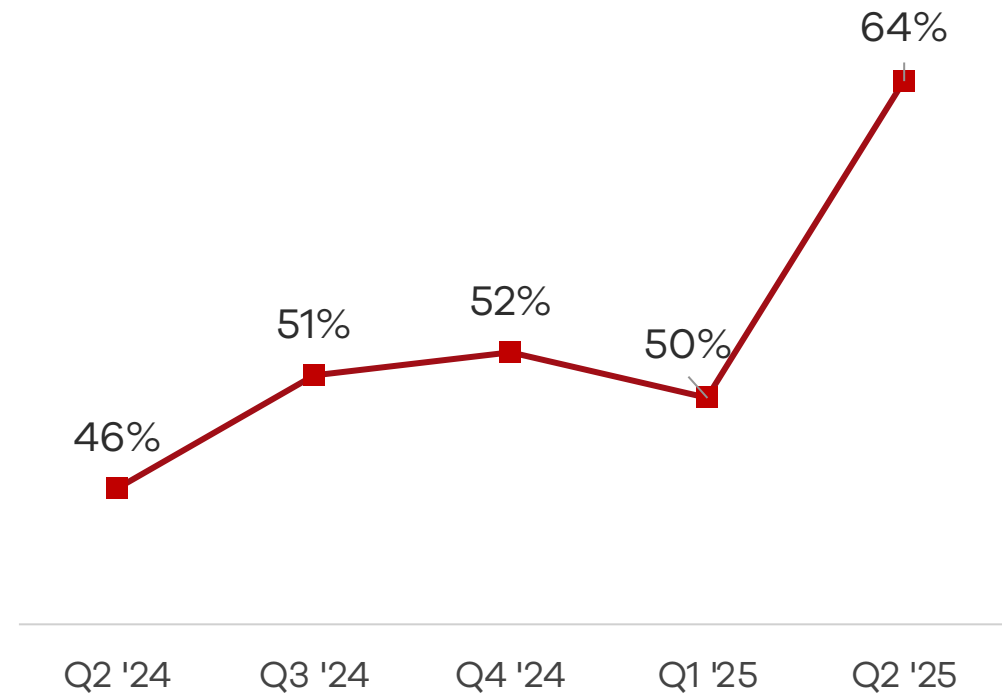
Significantly more Hawai'i prospects are using AI tools for travel planning compared to the previous four quarters.

Agreement with the following AI-related statements

■ U.S. leisure travelers ■ Likely Hawaii visitors



AI Usage for Travel Planning Over Time
(Among Hawai'i prospects)

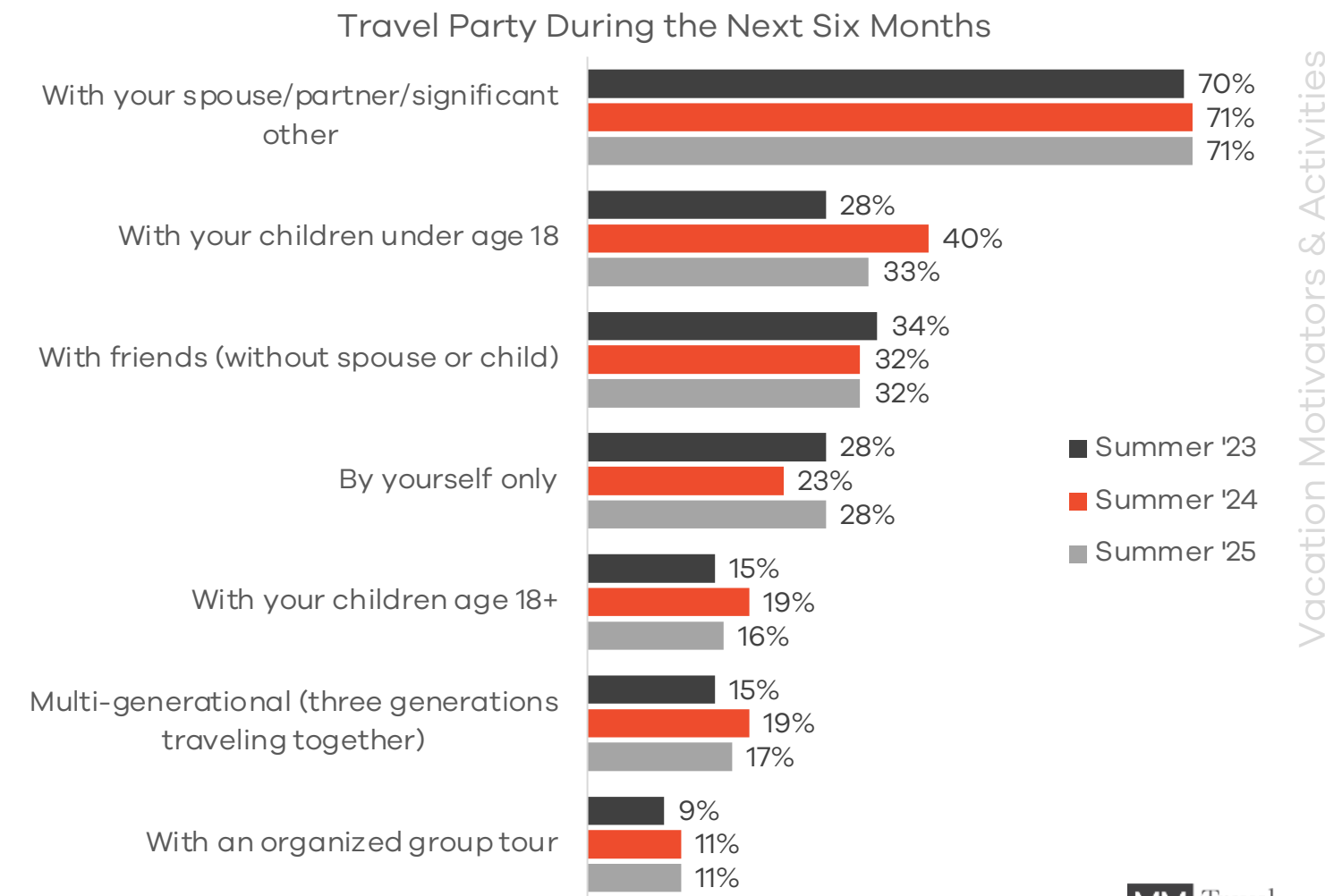


Vacation Motivators & Activities

Base: Likely Hawai'i Visitors (n=976); those who have used ChatGPT or another AI tool for travel planning (n=346)

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

More likely Hawai'i visitors are traveling solo compared to Summer 2024.

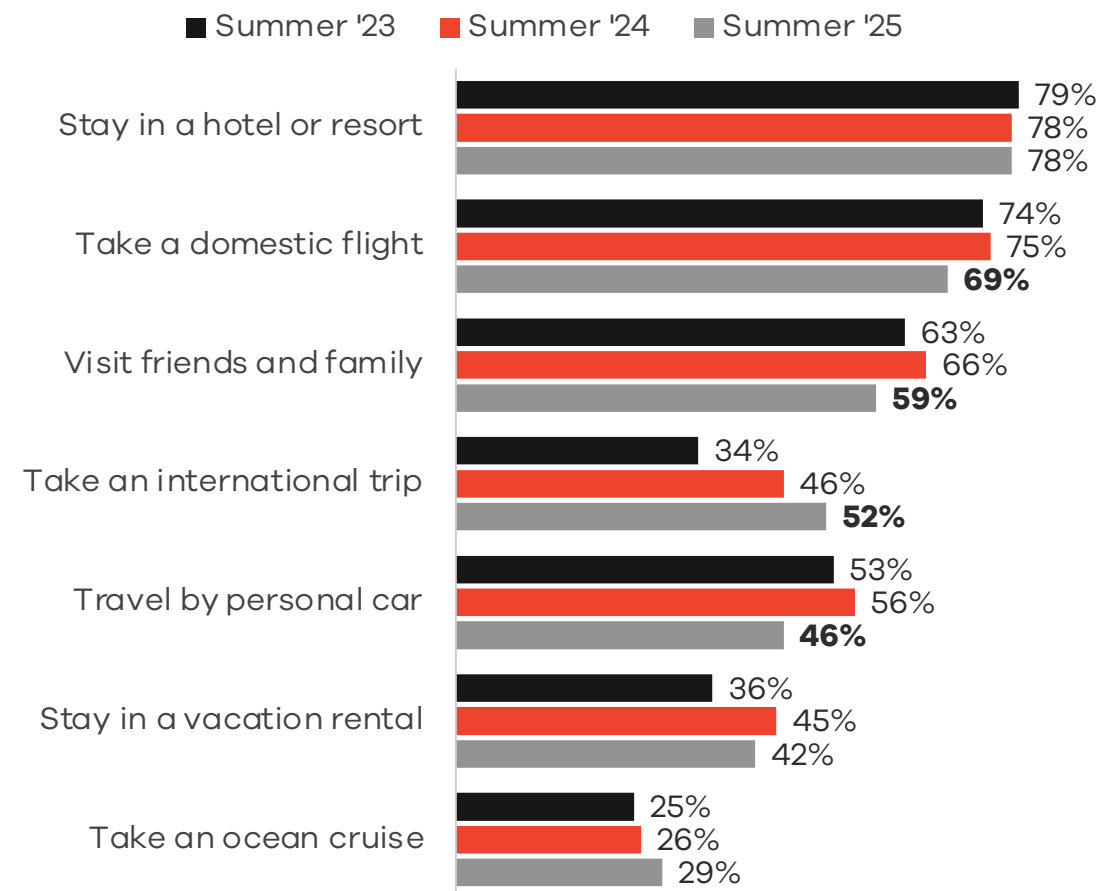


Base: Likely Hawai'i Visitors who intend to travel during the next six months (n=910)
Source: MMGY's 2025 *Portrait of American Travelers*® "Summer Edition"



Staying in a hotel or resort and taking a domestic flight top the list of travel expectations for Hawai'i prospects.

Top Travel Expectations in the Next 6 Months

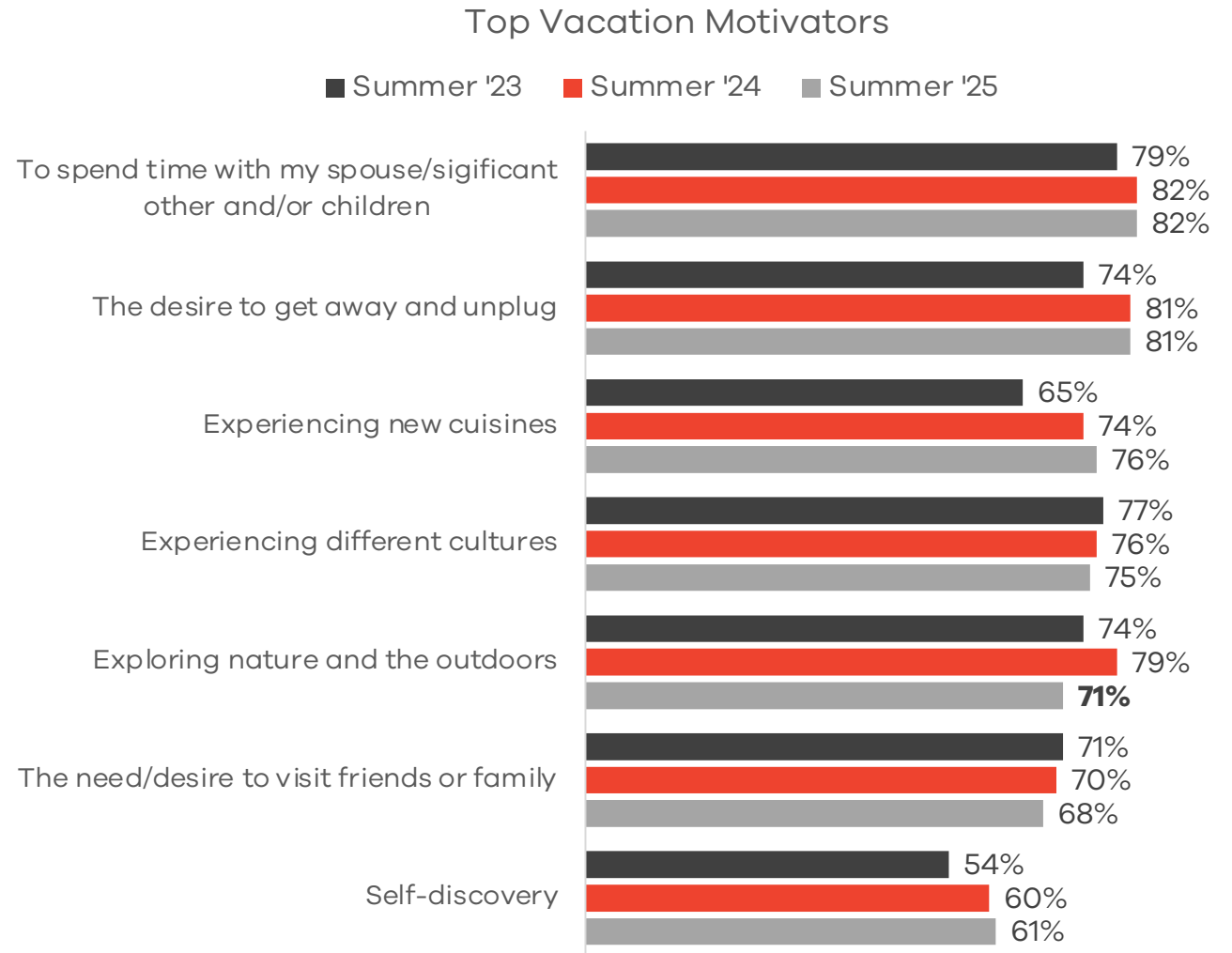


Data in bold indicates a significant difference from Summer 2024.

Base: Likely Hawai'i Visitors who intend to travel during the next six months (n=910)

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

Exploring nature and the outdoors is less motivating for likely Hawai'i visitors than in Summer 2024.



Vacation Motivators & Activities

Data in bold indicates a significant difference from Summer 2024.

Base: Likely Hawai'i Visitors (n=976)

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

What Destination Attributes Influence Choice of Destination?

Influential When Selecting a Destination	Summer '23	Summer '24	Summer '25
Beautiful scenery	70%	76%	68%
Food and drink scene	61%	65%	62%
Safety	65%	66%	62%
Historical significance of a destination	48%	54%	48%
Outdoor/nature activities	52%	61%	46%
A sense of tradition (place family has traditionally visited)	33%	33%	32%
Focus on family activities	32%	41%	31%
The ethnic diversity and multicultural population of a destination	30%	33%	29%
Music scene	27%	32%	28%
The destination's reputation for environmental responsibility	20%	24%	26%
Nightlife/bars	25%	29%	23%
The destination's commitment to social justice and equality	19%	19%	22%
LGBTQ+ travel offerings	10%	8%	7%

Data in bold indicates a significant difference from Spring 2024.

- / Beautiful scenery, safety and the food and drink scene remain the top three destination attributes for likely Hawai'i visitors. However, the influence of beautiful scenery has become significantly less important compared to Summer 2024, indicating that other destination attributes are beginning to hold more sway over potential visitors.
- / Destinations must continue to ensure they are offering a wide variety of attributes to attract new visitors as well as entice repeat travelers with new experiences.



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THANK YOU