

Summer Edition 2022

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 4,557 U.S. adults in April 2022.

This report primarily focuses on those *Likely to Visit Hawaii*, defined as those who intend to take at least one overnight leisure trip during the next 24 months, have traveled by air in the past 18 months, and likely to visit Hawaii (4 or 5 on a 5-point scale). There were a total of 646 Likely Hawaii Visitors. At the bottom of each slide, the "Base" will detail the audience represented in the data.

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

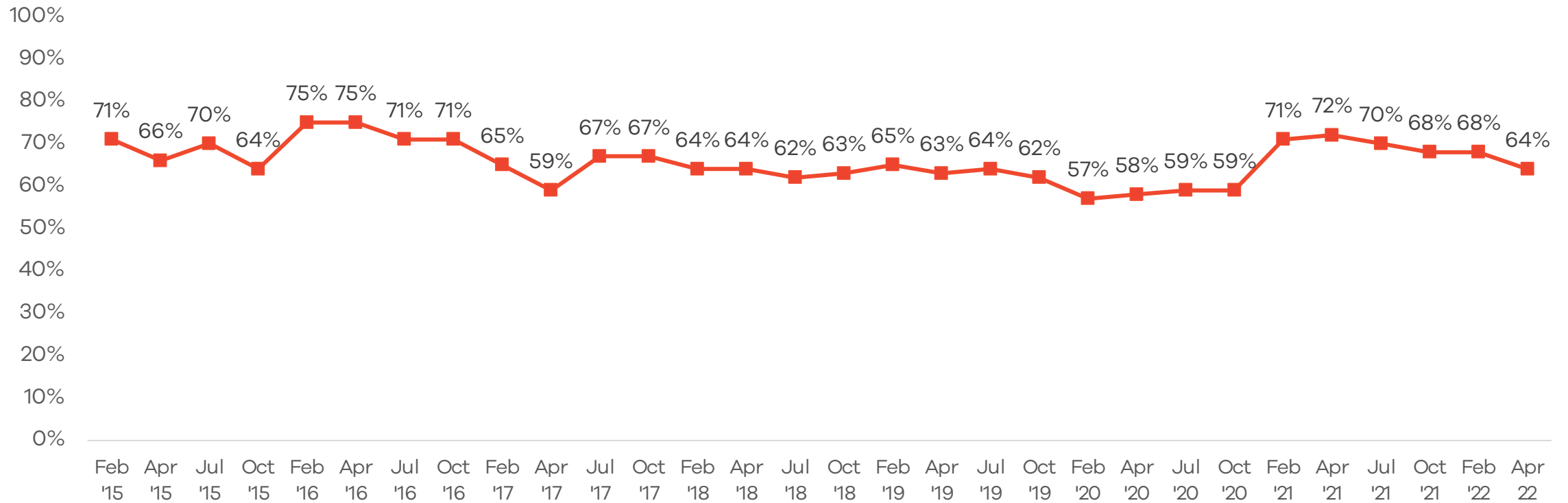
The four generations of adults surveyed are defined below. Due to the small the number of Silent/GI respondents, we did not include their individual results in this report.

Generation	Age	% of Respondents
Gen Zs	18–24	11%
Millennials	25–40	28%
Gen Xers	41–56	25%
Boomers	57–75	31%
Silent/GI	75+	5%

Hawaii Tourism Proprietary Questions

Interest in Visiting Hawaii is Down Significantly from April '21.

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



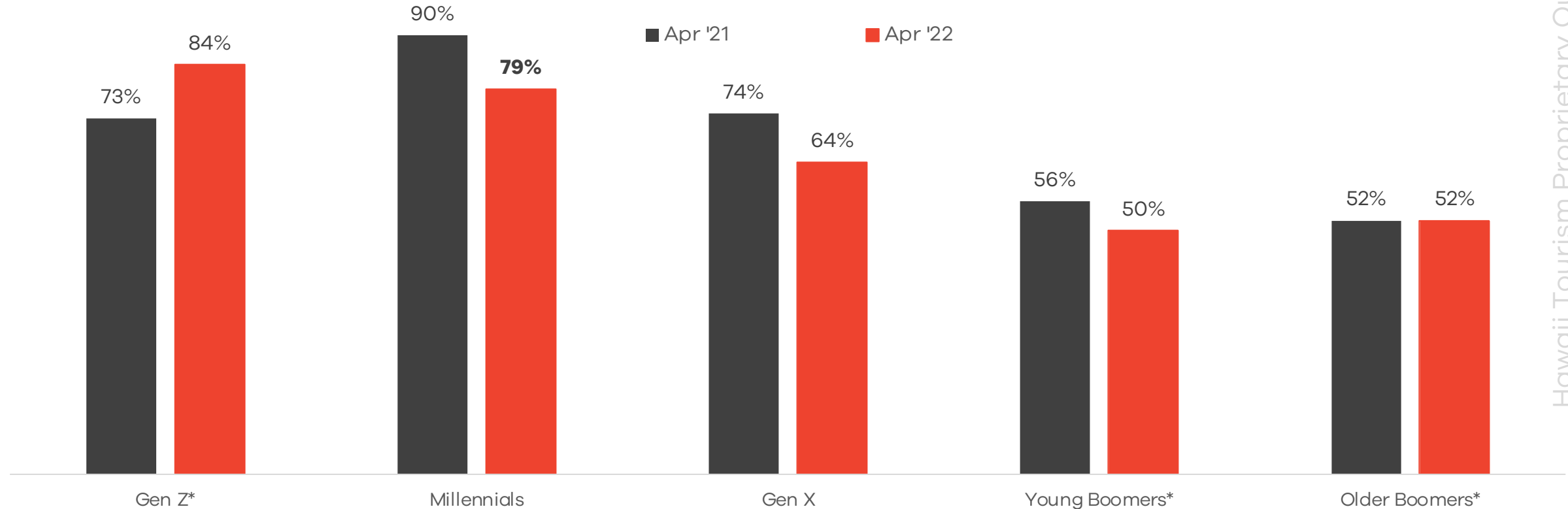
Hawaii Tourism Proprietary Questions

Base: Air Travelers (n=1,432)

Source: MMGY Global's 2022 *Portrait of American Travelers*® "Summer Edition"

Interest in Visiting Hawaii Decreased Among Millennials from April '21.

Interest in Visiting Hawaii
By Generation



* Small sample size – Interpret with caution.

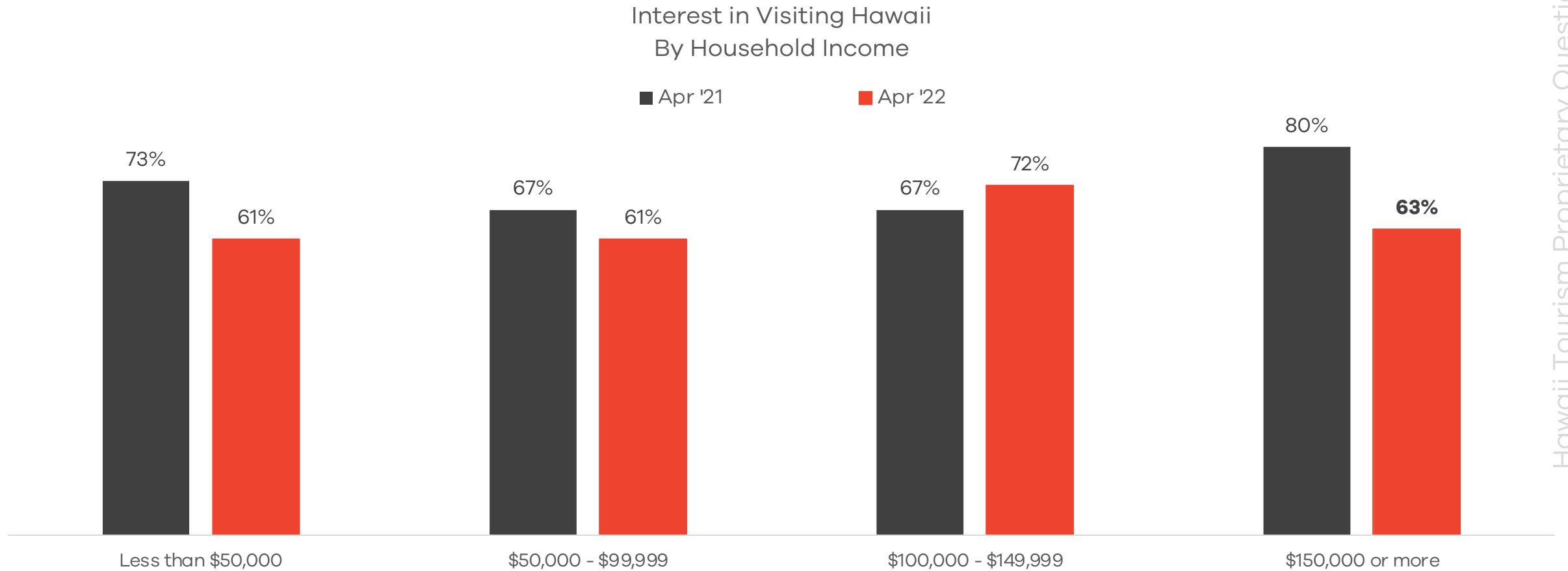
Data in bold indicates a significant difference from April 2021.

Base: Air Travelers (n=1,432)

Source: MMGY Global's 2022 *Portrait of American Travelers*® "Summer Edition"

Hawaii Tourism Proprietary Questions

Despite a Decrease Among Those With Household Incomes of \$150,000 or More, Interest in Visiting Hawaii is Still Highest Among Those with Higher Household Incomes



Hawaii Tourism Proprietary Questions

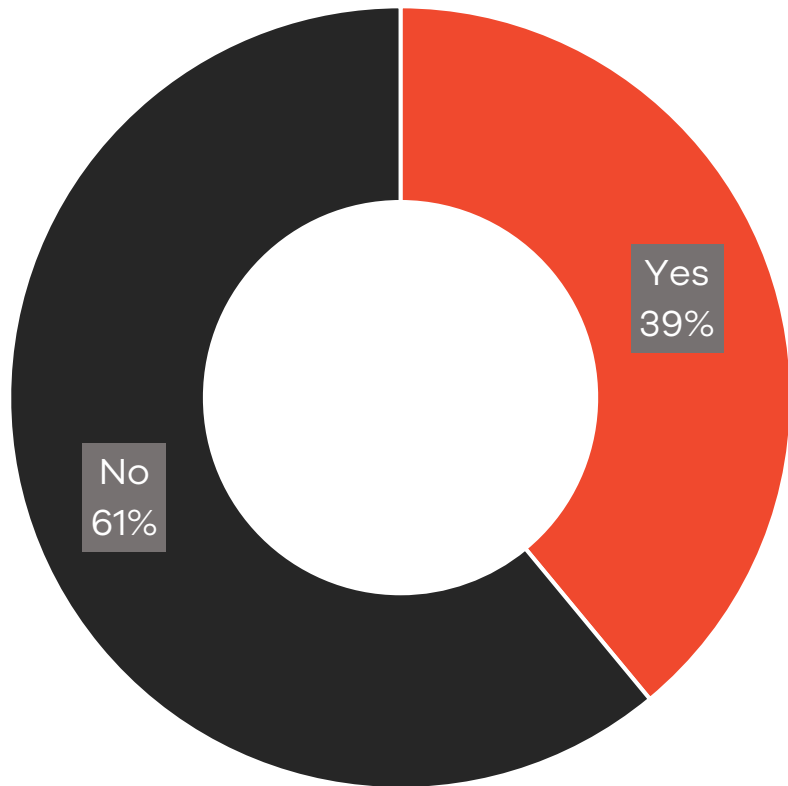
Data in bold indicates a significant difference from February 2021.

Base: Air Travelers (n=1,432)

Source: MMGY Global's 2022 *Portrait of American Travelers*® "Summer Edition"

The Cost to Visit Hawaii is the Top Deterrent to Visit, Increasing Slightly from Last Year and Now Higher Than Concerns of COVID-19.

Considered Visiting Hawaii But Changed Mind



Reasons For Not Visiting Hawaii – Among Those Who Changed Their Mind	Apr '21	Apr '22
Price of airfare	31%	35%
Price of a vacation package	26%	30%
Hawaii's COVID-19 travel restrictions	NA	27%
Price of the hotel	27%	25%
Better value at another destination	23%	23%
Concerns about COVID-19 variants	NA	21%
The flight to Hawaii is too long	22%	20%
Accommodations were not available	11%	12%
Already been and want to try another destination	18%	11%
Not enough time to travel to Hawaii	13%	11%
Not sure which island(s) in Hawaii to visit	13%	11%
Hawaii is too crowded	17%	10%
Hurricanes and tropical storms hitting Hawaii	13%	9%
Local people are not friendly	12%	9%
Hawaii is not unique enough	11%	8%
Not enough activities in Hawaii	7%	8%
Hawaii is not exotic enough	9%	6%

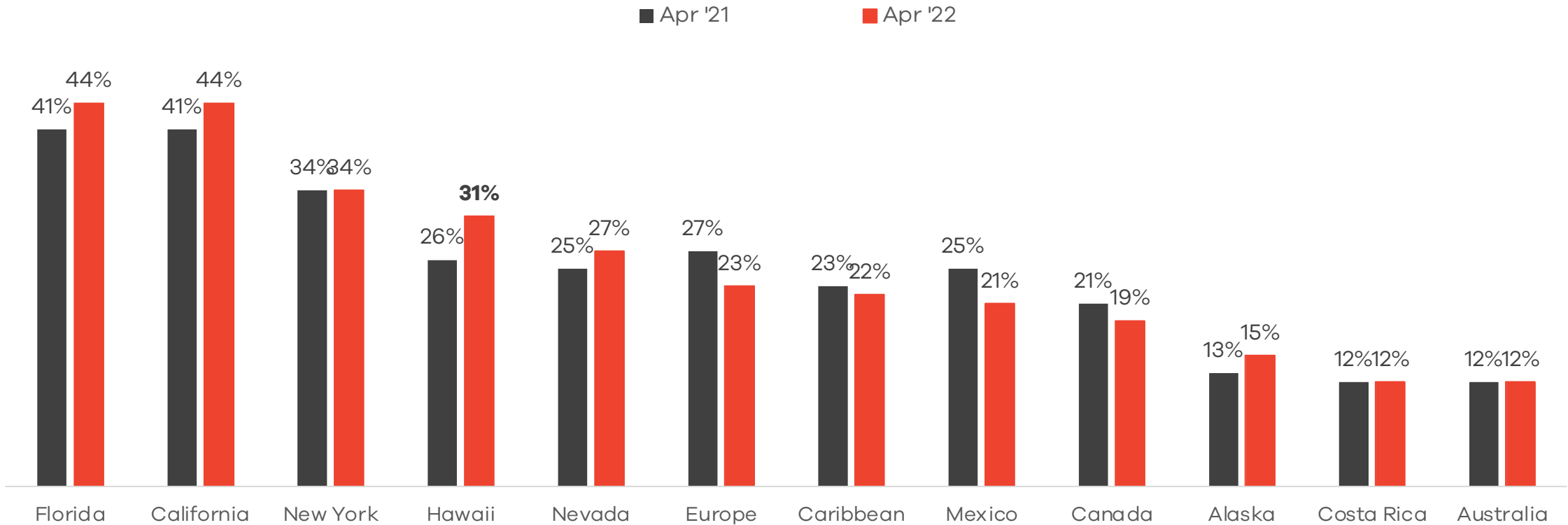
Data in bold indicates a significant difference from April 2021.

Base: Air Travelers (n=1,432) & Travelers Who Changed Their Mind (n=554)

Source: MMGY Global's 2022 *Portrait of American Travelers*® "Summer Edition"

Past Visitation To Hawaii Increased From April '21.

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

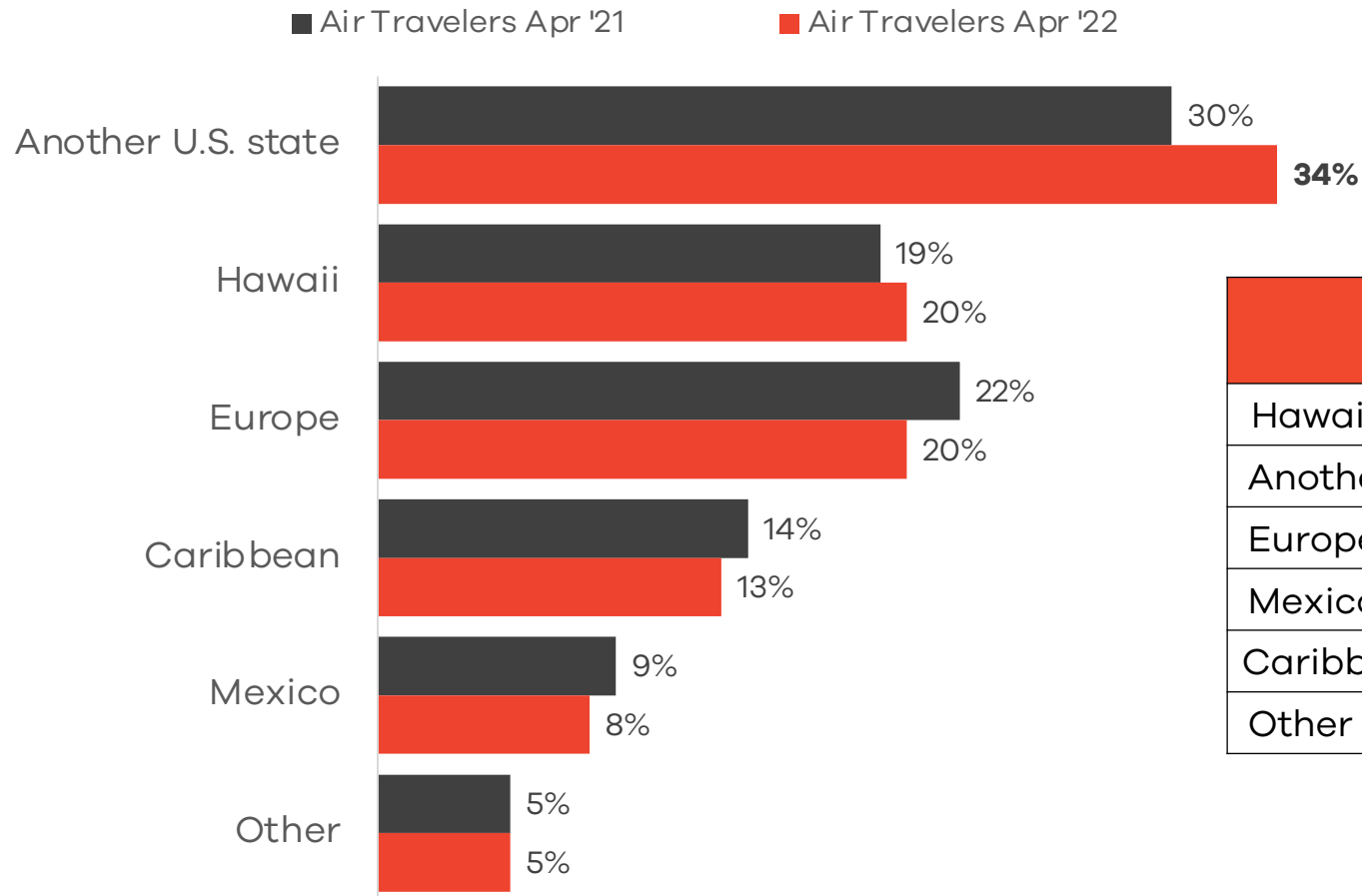


Data in bold indicates a significant difference from April 2021.

Base: Likely to Visit Hawaii (n=646)

Source: MMGY Global's 2022 *Portrait of American Travelers*® "Summer Edition"

Compared to Apr '21, Slightly More Air Travelers Are Interested in Visiting Another U.S. State When They Feel Safe To Take A Long-Haul Flight Again



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

	U.S. Leisure Travelers	Air Travelers	Likely To Visit Hawaii
Hawaii	19%	20%	31%
Another U.S. state	35%	34%	24%
Europe	16%	20%	22%
Mexico	7%	8%	10%
Caribbean	12%	13%	11%
Other	11%	5%	3%

Data in bold indicates a significant difference from April 2021.

Base: U.S. Leisure Travelers (n=3,639), Air Travelers (n=1,432), Likely to Visit Hawaii (n=646)

Source: MMGY Global's 2022 *Portrait of American Travelers*® "Summer Edition"



HAWAII TOURISM PROPRIETARY SUMMARY

KEY TAKEAWAY:

- Interest in visiting Hawaii is down from last year. This decrease is seen among Millennials and those with household incomes more than \$150,000.
- Among those who planned to visit Hawaii but changed their mind, the most cited reasons for doing so are costs associated with visiting Hawaii, specifically for airfare and vacation packages.

WHAT IT MEANS:

The rising costs of travel and inflation will be important to keep an eye on as we're seeing a decrease in interest in visiting Hawaii this wave and the costs associated with traveling to Hawaii becoming a top factor for not visiting Hawaii after planning to do so. Although we saw a decrease in interest, the percentage of U.S. Leisure Travelers interested in visiting is still in line with the percentage of interest we measured pre-COVID.



The Hawaii Prospect

Self-Described Personas

	U.S. Leisure Travelers	Likely Hawaii Visitors
Beach lover	44%	51%
Foodie	35%	43%
Pet lover	35%	38%
Family traveler	35%	37%
Sports fan/enthusiast	26%	35%
Wine enthusiast	18%	33%
World traveler	18%	33%
Cruise lover	18%	30%
Travel bargain hunter	28%	30%
Outdoor adventurer	26%	29%
Moderate	22%	29%
Theme park enthusiast	20%	28%
Environmentally-conscious	21%	26%
Luxury traveler	14%	25%
All-inclusive enthusiast	17%	24%
Concert/festival enthusiast	18%	21%
Liberal	17%	20%
Conservative	22%	20%
Golf enthusiast	9%	17%
Road warrior	6%	15%
Ski/snowboard enthusiast	5%	14%
Recreational cannabis user	8%	12%
Social justice enthusiast	7%	11%

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

Base: U.S. Leisure Travelers (n=3,639), Likely to Visit Hawaii (n=646)

Source: MMGY Global's 2022 *Portrait of American Travelers*® "Summer Edition"

Demographics

	U.S. Leisure Travelers	Likely Hawaii Visitors
Male	48%	57%
Female	51%	43%
Other	1%	0%
Gen Zs	11%	13%
Millennials	28%	36%
Gen Xers	25%	25%
Young Boomers	17%	14%
Older Boomers	14%	9%
Have children under 18 at home	31%	51%
White	73%	74%
Hispanic	17%	21%
African American/Black	14%	12%
Asian	7%	10%
Native American	3%	2%
Pacific Islander	1%	1%
Other	4%	2%

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

Base: U.S. Leisure Travelers (n=3,639), Likely to Visit Hawaii (n=646)

Source: MMGY Global's 2022 *Portrait of American Travelers*® "Summer Edition"

Demographics

	U.S. Leisure Travelers	Likely Hawaii Visitors
Under \$30,000	16%	5%
\$30,000 - \$49,999	14%	9%
\$50,000 - \$74,999	16%	13%
\$75,000 - \$99,999	13%	14%
\$100,000 - \$124,999	9%	9%
\$125,000 - \$149,999	9%	17%
\$150,000 - \$249,999	17%	25%
\$250,000 - \$499,999	4%	6%
\$500,000 or more	2%	2%
4 years or less of high school	38%	18%
1-3 years of college	27%	27%
4 years of college	22%	35%
Some graduate school	3%	4%
Graduate/professional degree	10%	15%

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

Base: U.S. Leisure Travelers (n=3,639), Likely to Visit Hawaii (n=646)

Source: MMGY Global's 2022 *Portrait of American Travelers*® "Summer Edition"

Demographics

	U.S. Leisure Travelers	Likely Hawaii Visitors
South	38%	33%
West	24%	32%
Midwest	21%	20%
North	17%	16%
Employed (full or part-time)	56%	72%
Retired	25%	18%
Temporarily unemployed	8%	1%
Homemaker full-time	9%	6%
Student	3%	3%
Married/living together	66%	76%
Never married	23%	19%
Divorced/separated/widowed	11%	6%

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



THE HAWAII PROSPECT SUMMARY

KEY TAKEAWAY:

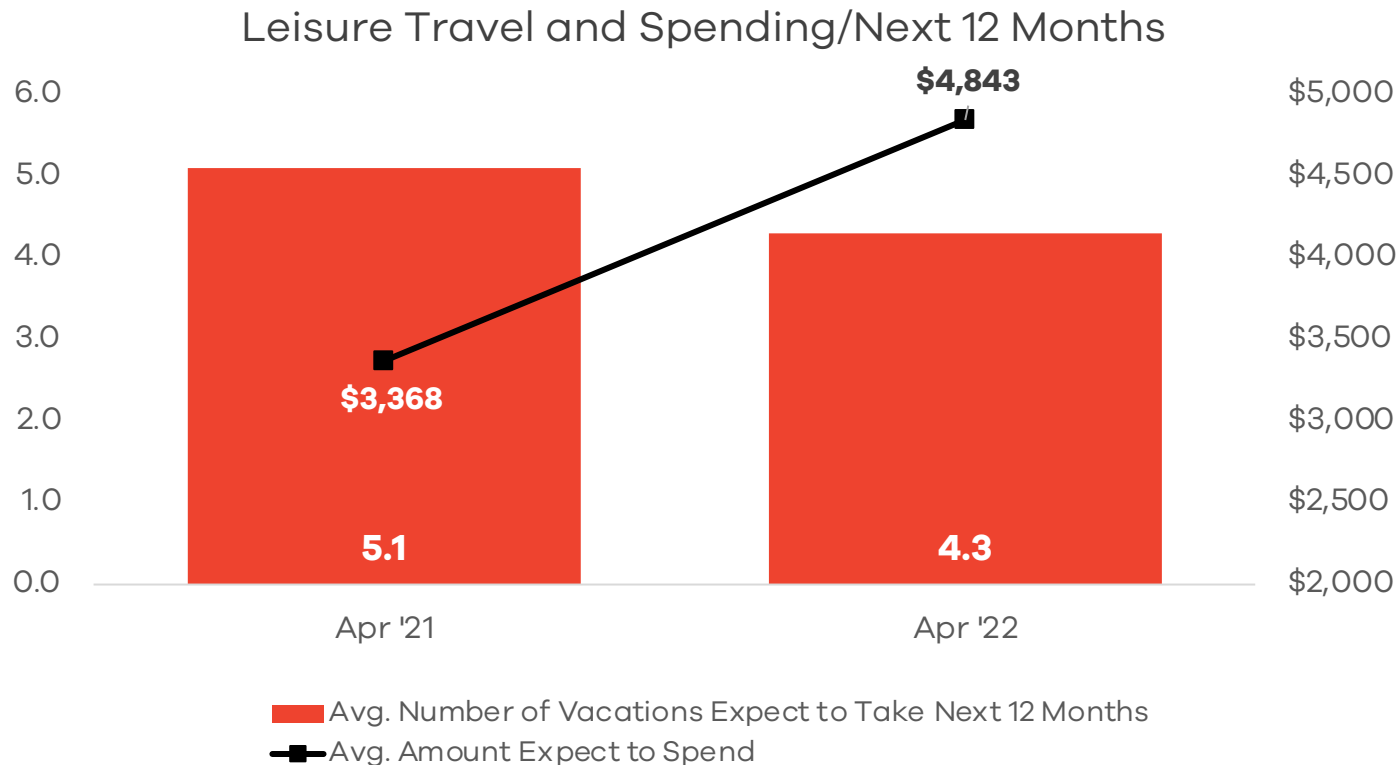
- Likely Hawaii Visitors describe themselves as a Beach Lover, Foodie, Pet Lover, and Family Traveler. They are more likely than the average U.S. Leisure Traveler to describe themselves as a Beach Lover, Foodie, Sports fan, Wine Enthusiast, World Traveler, Cruise Lover, Environmentally-Conscious, Luxury Traveler, and All-Inclusive Enthusiast.
- Compared to U.S. Leisure Travelers, Likely Hawaii Visitors are younger, well-educated, and have higher household incomes. They also are more likely to be married and have children.

WHAT IT MEANS:

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

Travel Outlook Snapshot

Spending Intentions Are Up From April '21 Despite Decrease In Intended Number of Trips.



Although those likely to visit Hawaii are planning to spend more on travel in the next 12 months, they're doing so with fewer trips. This could be because they're planning to take fewer but longer trips or it could be that they've had to cut back on number of trips due to inflation and travel costs increasing.

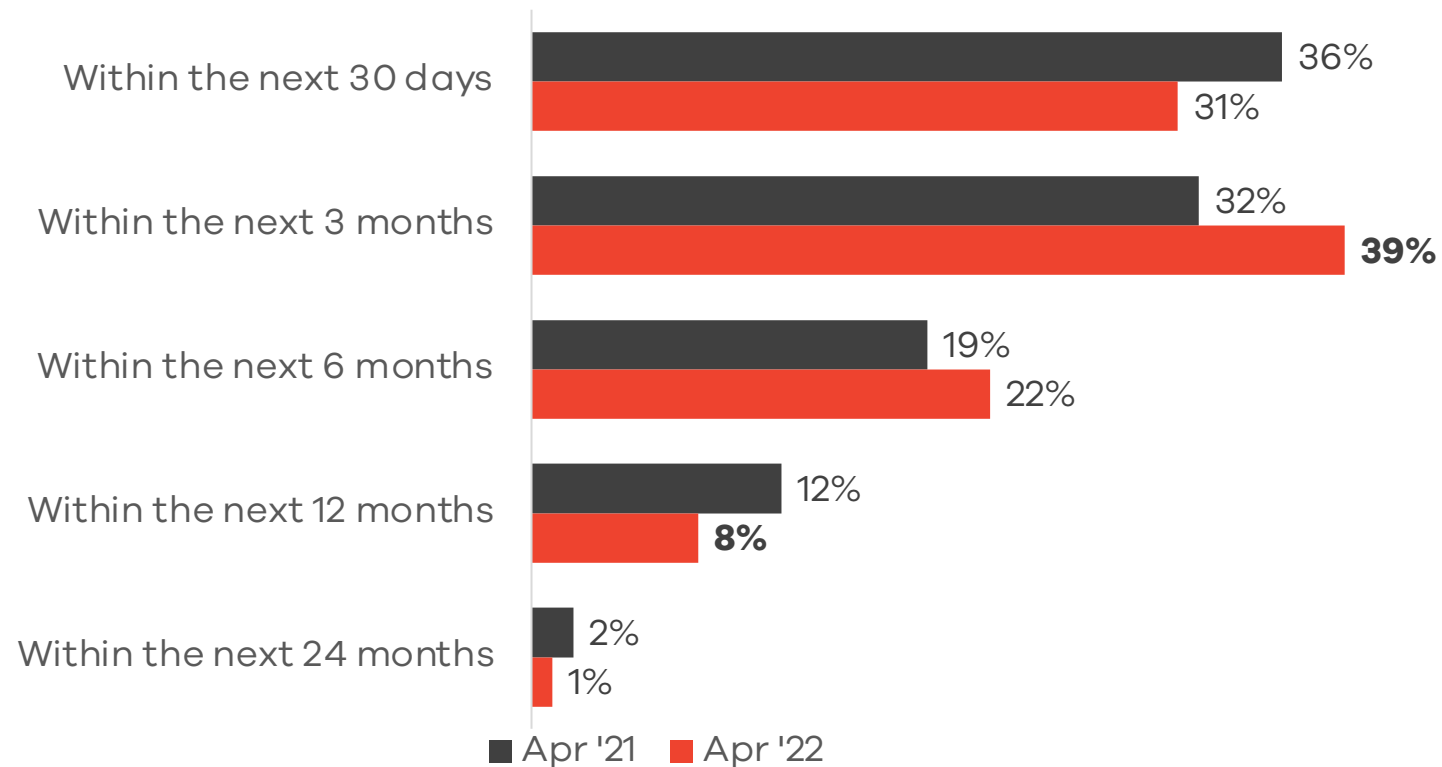
Traveler Intentions: Over Time

Base: Likely to Visit Hawaii & Planning to Take a Trip in the Next 12 Months (n=640)

Source: MMGY Global's 2022 *Portrait of American Travelers*® "Summer Edition"

Travel Intentions in the Next 3 Months Are Up From April '21.

Expected Timing of Next Leisure Vacation



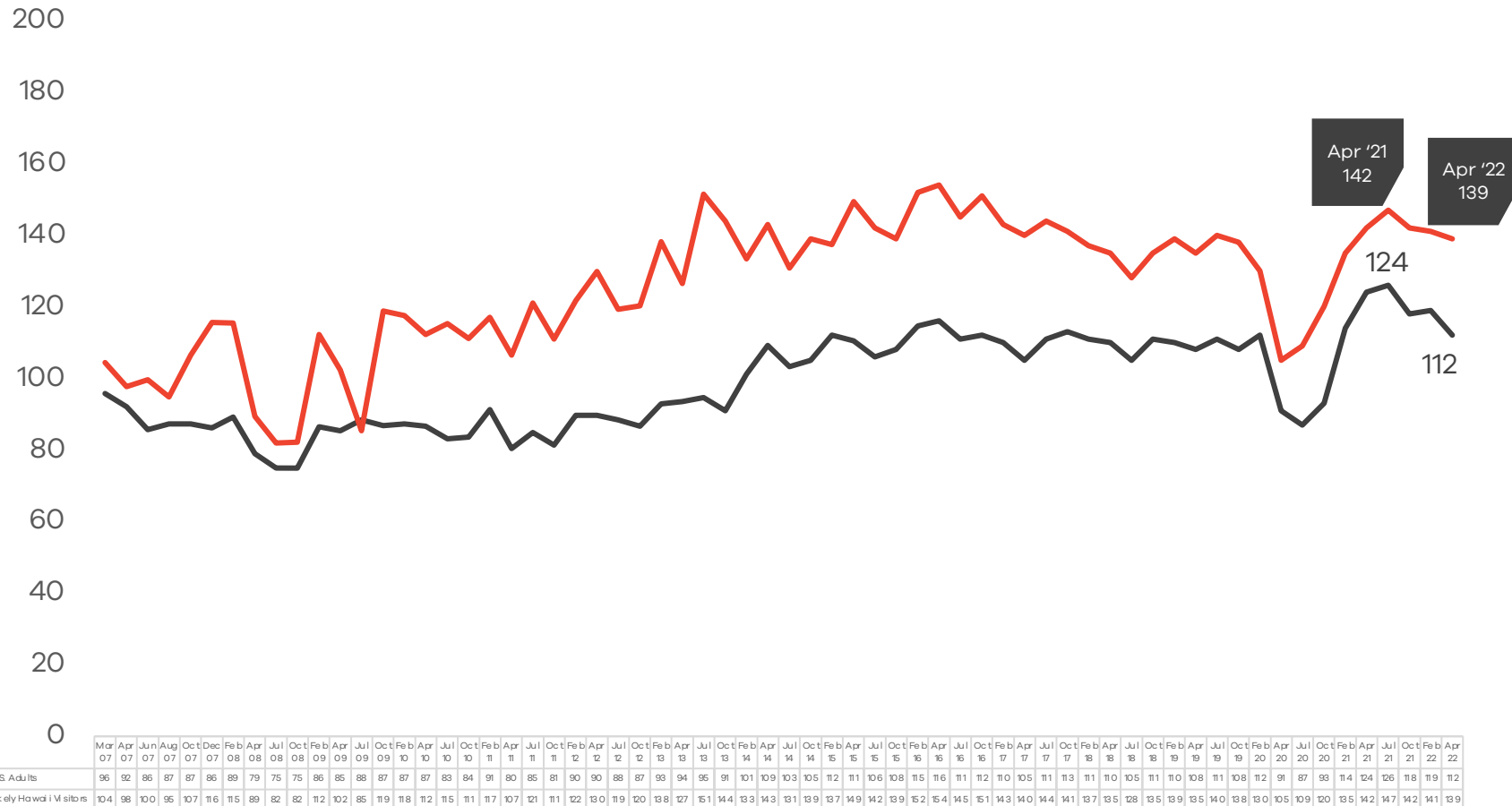
Traveler Intentions: Over Time

Data in bold indicates a significant difference from February 2021.

Base: Likely to Visit Hawaii (n=646)

Source: MMGY Global's 2022 *Portrait of American Travelers*® "Summer Edition"

Overall Traveler Sentiment Score: Down Slightly from One Year Ago



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.

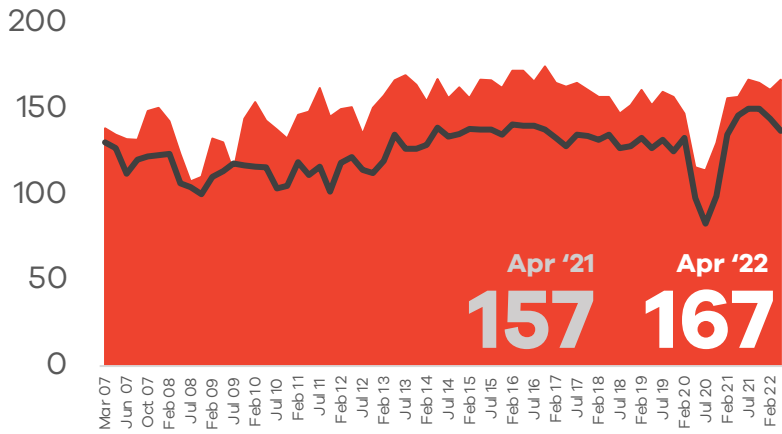
Traveler Sentiment Index™

Base: U.S. Adults (n=4,557) & Likely to Visit Hawaii w/o Air Travel (n=1,457)

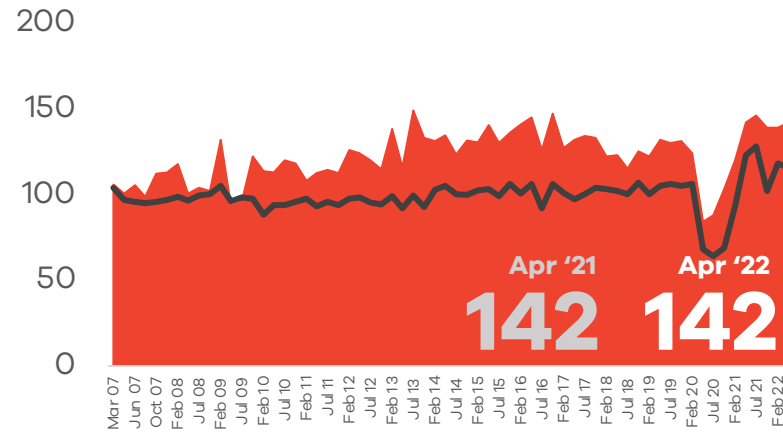
Source: MMGY Global's travelhorizons™/2022 Portrait of American Travelers® "Summer Edition"

Affordability of Travel Displayed The Largest Decrease From 2021

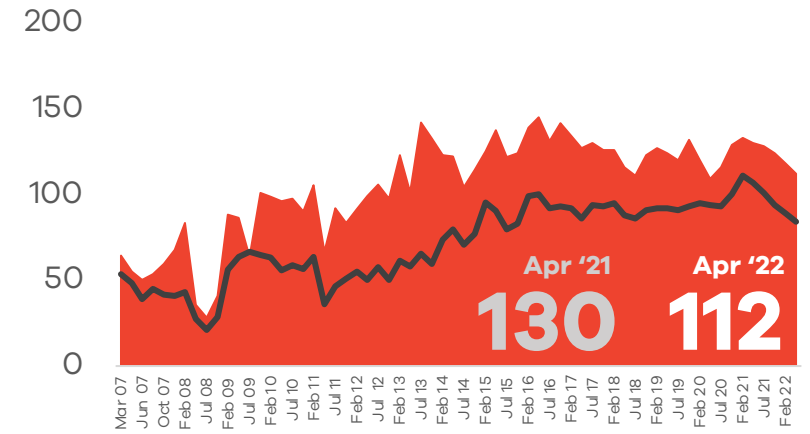
Interest in Travel



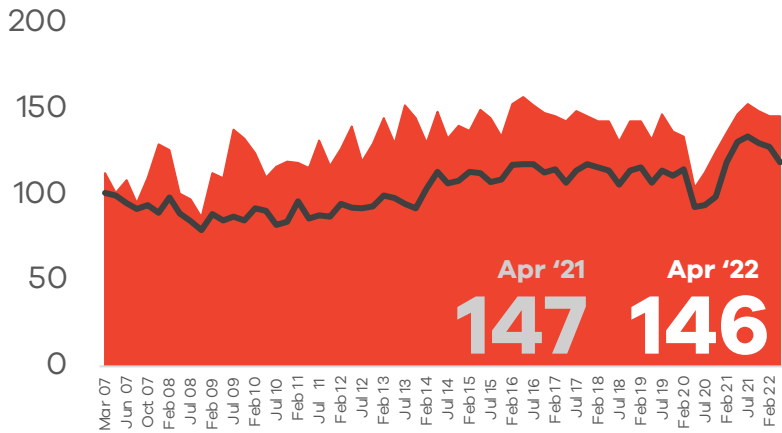
Perceived Safety of Travel



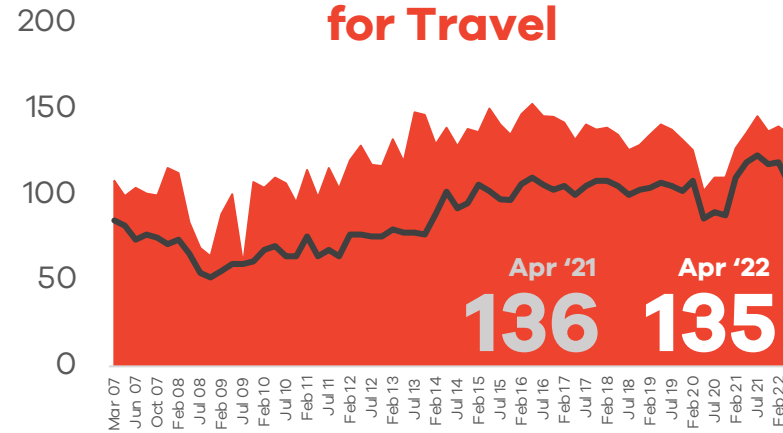
Affordability of Travel



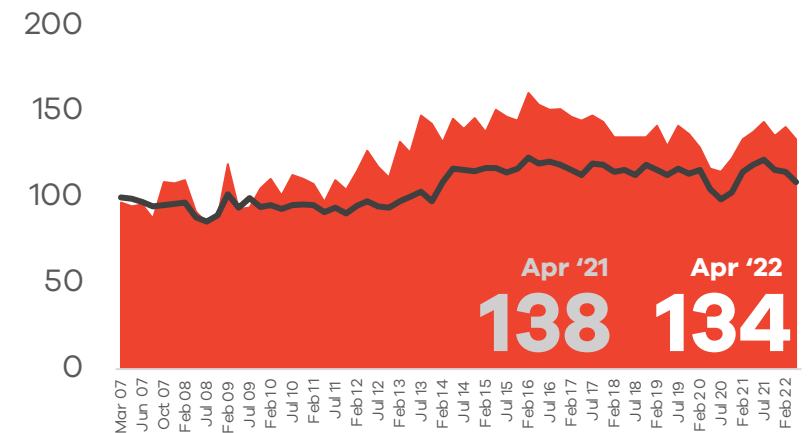
Time Available for Travel



Personal Finances Available for Travel



Quality of Service of Travel



Traveler Sentiment Index™

Base: U.S. Adults (n=4,557) (Black line) & Likely to Visit Hawaii w/o Air Travel (n=1,457)

Source: MMGY Global's travelhorizons™/2022 Portrait of American Travelers® "Summer Edition"



TRAVEL OUTLOOK SNAPSHOT SUMMARY

KEY TAKEAWAY:

- Despite a decrease in intended number of trips, we're seeing spending intentions of Likely Hawaii Visitors up significantly from this time last year. They plan to take an average of 4.3 trips this year and spend an average of \$4,843 during that time.
- The overall Traveler Sentiment Score of these travelers stands at 139, down 3 points from this time last year. The perceived affordability of travel displayed the largest decrease from last year while many other components were relatively unchanged. Interest in travel displayed the only increase.

WHAT IT MEANS:

With perceived affordability of travel decreasing, Likely Hawaii Visitors are showing signs that rising costs of travel and inflation are impacting them to some extent. Despite this, interest in travel is increasing, and they are still planning to travel and spend money on travel, this travel will just look a little different than it has in the past.

Barriers to Travel

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

% Who Perceive Each Travel Aspect To Be Safe	Apr '21	Apr '22
Traveling by personal car	83%	87%
Visiting friends and family	76%	85%
Going to a beach	72%	83%
Staying in a hotel or resort	73%	82%
Taking an overnight domestic trip	73%	81%
Going to a park	71%	79%
Taking a domestic flight	68%	77%
Staying in a vacation rental	74%	75%
Participating in snow sports	61%	69%
Visitors coming to my city or town from outside the local area	61%	68%
Visiting a theme or amusement park	55%	66%
Attending a sporting event	53%	64%
Taking an overnight international trip	58%	63%
Taking a river cruise	55%	61%
Taking an ocean cruise	51%	57%
Attending a conference or convention	54%	56%
Attending a concert/festival	49%	54%

Data in bold indicates a significant difference from April 2021.

Barriers To Travel

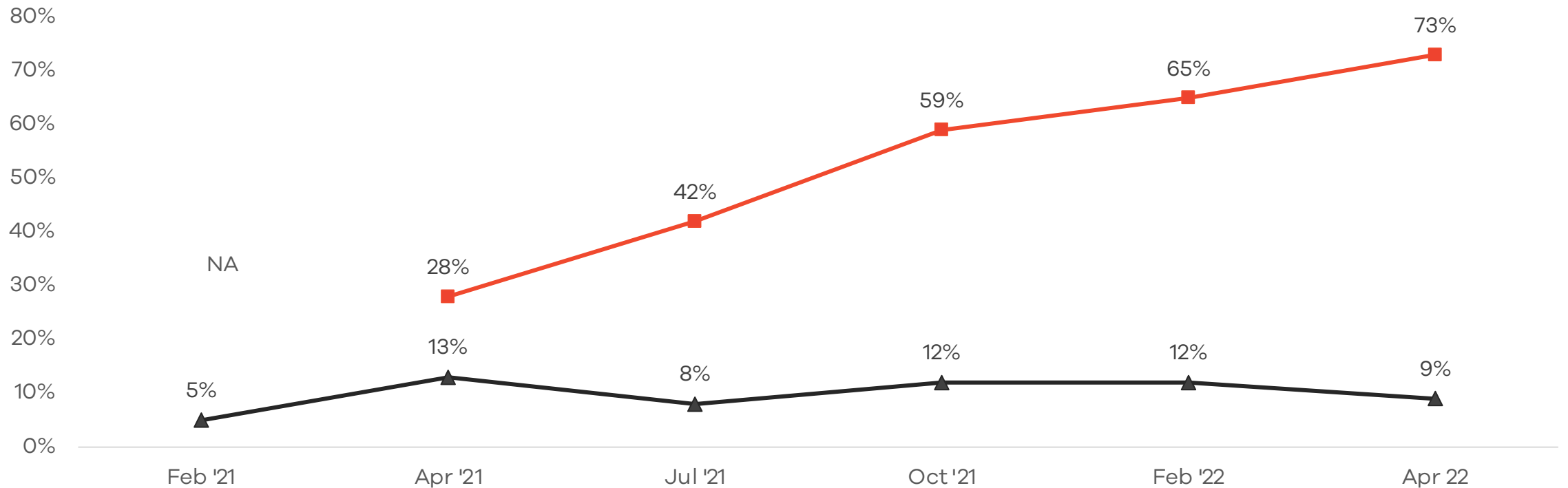
Base: Likely to Visit Hawaii (n=646)

Source: MMGY Global's 2022 *Portrait of American Travelers*® "Summer Edition"

Three-Quarters of Likely Hawaii Visitors Have Already Received The Vaccine, Continuing The Upward Trend From Past Waves

COVID-19 Vaccination Status of Those Likely To Visit Hawaii

■ I have already received the vaccine ▲ I will not get the vaccine



Barriers To Travel

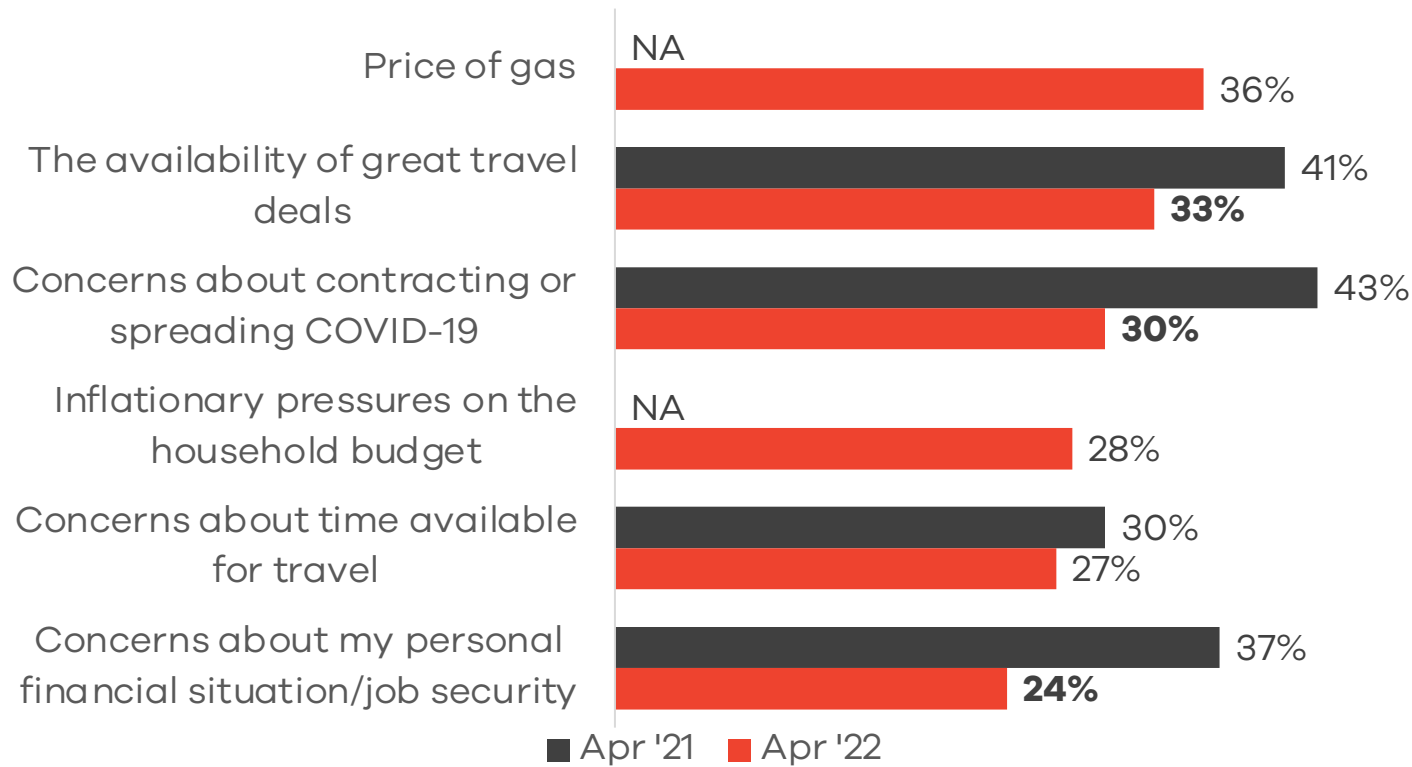
NA: Answer option was not asked in this wave

Base: Likely to Visit Hawaii (n=646)

Source: MMGY Global's 2022 *Portrait of American Travelers*® "Summer Edition"

Likely Hawaii Visitors Are Concerned About The Price of Gas When Planning Travel.

% Who Are Extremely Impacted By...



/ The price of gas is now the top concern among those likely to visit Hawaii after many other concerns displayed decreases in impact from last year.

Barriers To Travel

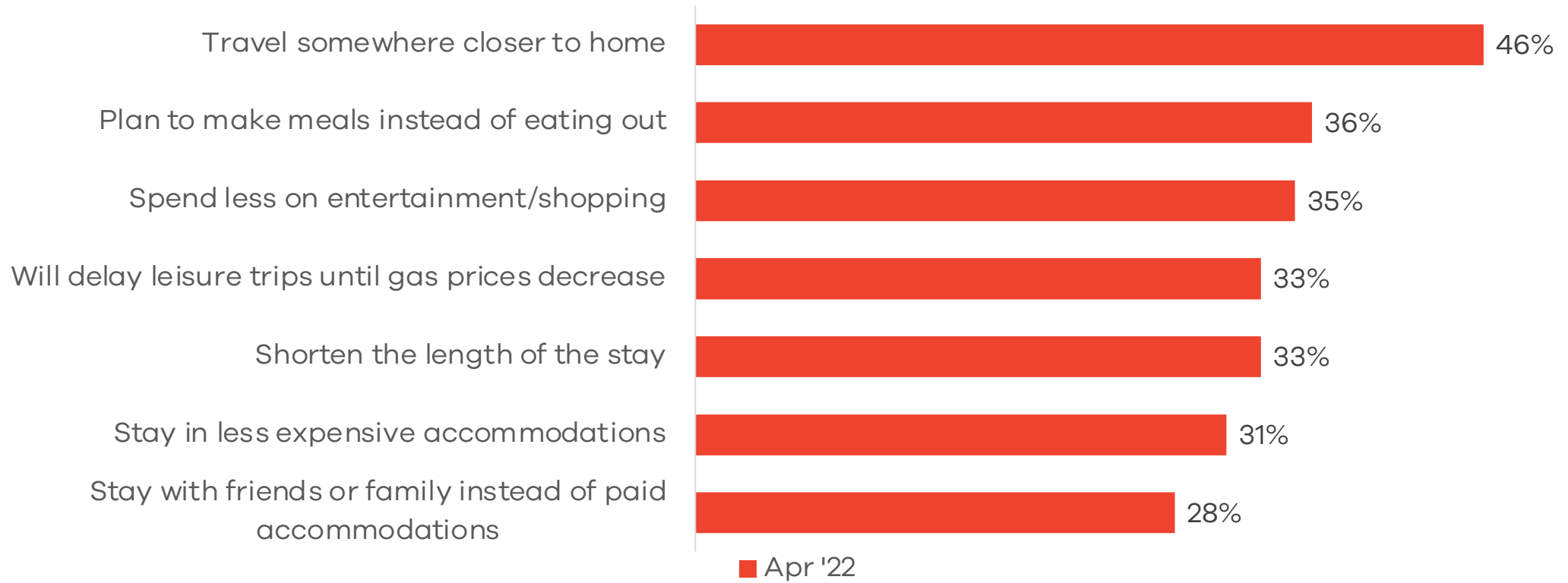
Data in bold indicates a significant difference from April 2021.

Base: Likely to Visit Hawaii (n=646)

Source: MMGY Global's 2022 *Portrait of American Travelers*® "Summer Edition"

Likely Hawaii Visitors impacted by gas prices say they will travel somewhere closer to home, followed by make meals instead of eating out, and will spend less on entertainment and shopping.

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



Barriers To Travel

Base: At least somewhat impacted by the price of gas & Likely Hawaii Visitors (n=482)

Source: MMGY Global's 2022 *Portrait of American Travelers*® "Summer Edition"



BARRIERS TO TRAVEL SUMMARY

KEY TAKEAWAY:

- Perceptions around the safety of travel are continuing to improve and the percentage of Likely Hawaii Visitors who have received the COVID-19 vaccine continues to increase.
- When planning travel, one-third of Likely Hawaii Visitors are impacted by the price of gas, followed by concerns about COVID-19, although down significantly from February.
- The price of gas is impacting some of these Likely Hawaii Visitors' travel plans in the next six months, with nearly half saying they will travel closer to home, one-third planning to make meals instead of eating out and spending less on entertainment and shopping.

WHAT IT MEANS:

While concerns around COVID-19 are slowly decreasing and vaccinations continue to increase, we're starting to see more concern around the price of gas and rising costs of travel in general. This is already starting to impact how Likely Hawaii Visitors are planning to travel and will be important to keep an eye on in the future if these high costs and inflation persist.

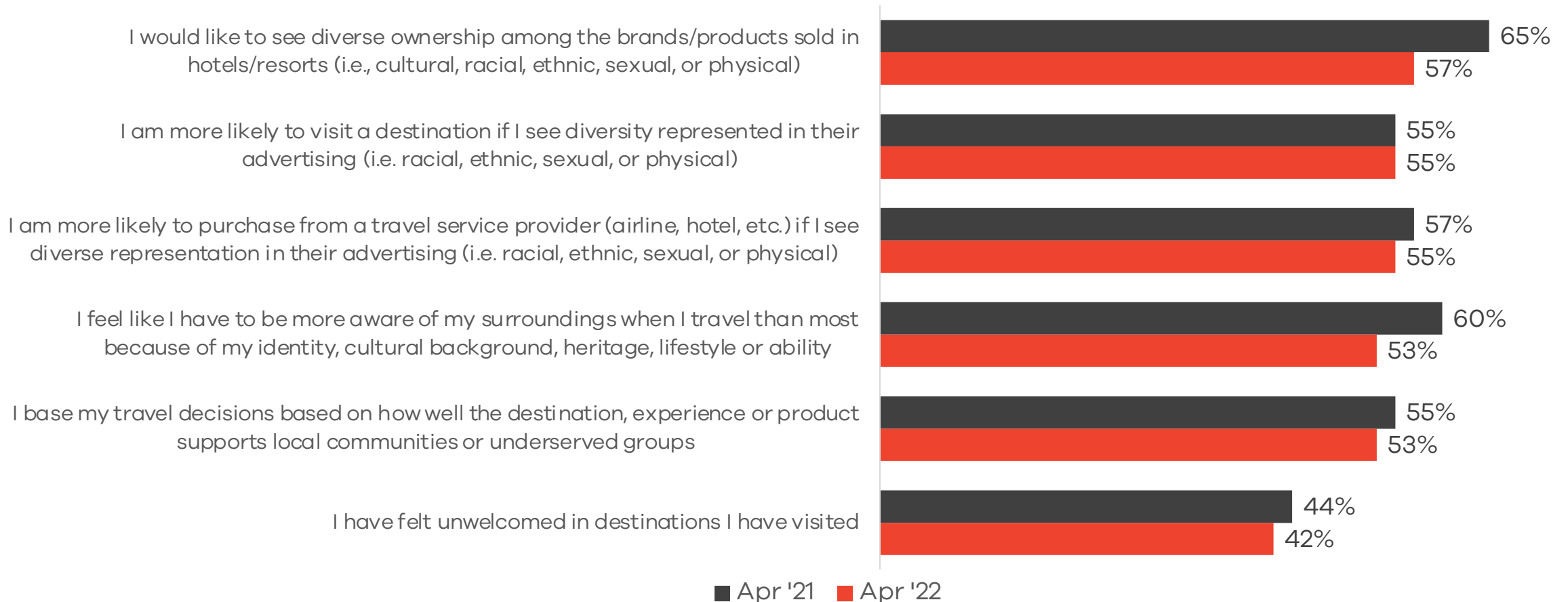


Diversity in Travel

Summer Module

Representation in advertising is important to Likely Hawaii Visitors

Diversity Statements: % Agree



Diversity in Travel

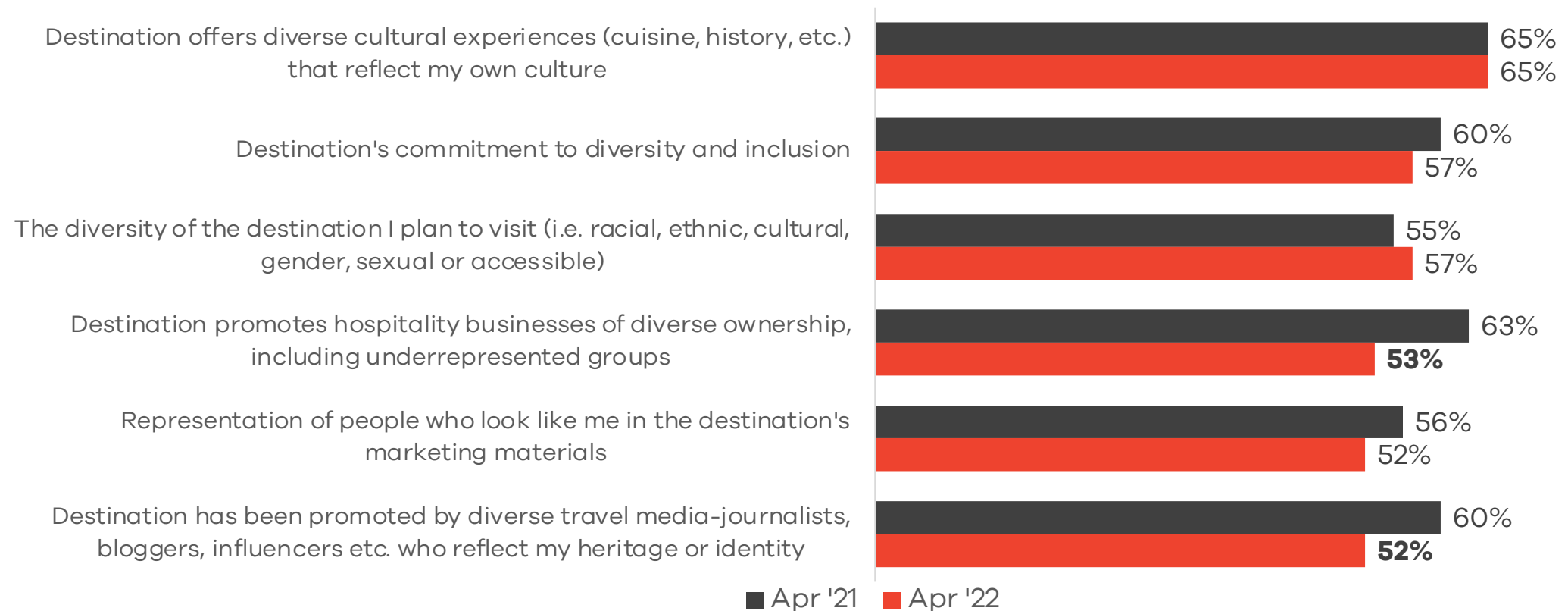
Data in bold indicates a significant difference from April 2021.

Base: Likely to Visit Hawaii (n=646)

Source: MMGY Global's 2022 *Portrait of American Travelers*® "Summer Edition"

Likely Hawaii Visitors Are Choosing Destinations That Offer Diverse Cultural Experiences, Are Committed to Diversity and Inclusion, and Are Diverse Themselves.

Influential Factors When Choosing a Leisure Destination



Diversity in Travel

Data in bold indicates a significant difference from April 2021.

Base: Likely to Visit Hawaii (n=646)

Source: MMGY Global's 2022 *Portrait of American Travelers*® "Summer Edition"

48%
2022

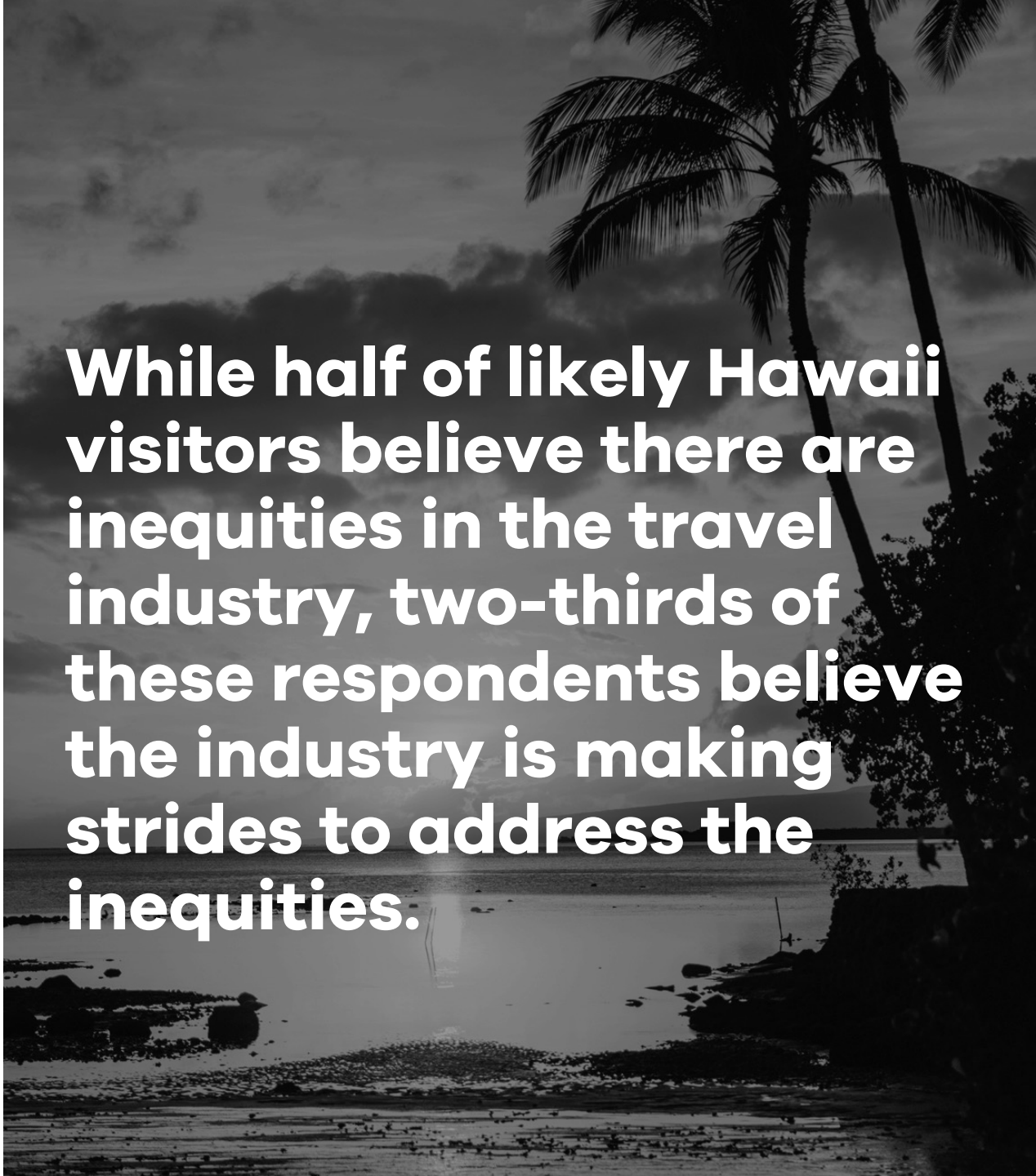
of likely Hawaii visitors believe there are racial, ethnic, sexual and/or physical inequities when it comes to the travel industry

66%
2022

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

Base: Likely to Visit Hawaii (n=646)

Source: MMGY Global's 2022 *Portrait of American Travelers*® "Summer Edition"



While half of likely Hawaii visitors believe there are inequities in the travel industry, two-thirds of these respondents believe the industry is making strides to address the inequities.



DIVERSITY IN TRAVEL SUMMARY

KEY TAKEAWAY:

- More than half of Likely Hawaii Visitors agree that they are more likely to visit a destination if they see diverse representation in its advertising. Two-thirds are also influenced by a destination that offers diverse cultural experiences, and nearly 6 in 10 by its commitment to diversity and inclusion.
- Although half of Likely Hawaii Visitors recognize that there are racial, ethnic, sexual, and physical inequities in the travel industry, two-thirds of these travelers are optimistic that the industry is addressing these inequities.

WHAT IT MEANS:

While representation in advertising is important to Likely Hawaii Visitors, diversity and representation needs to extend further than just advertising. These travelers want to have diverse cultural experiences and they want to see a commitment to diversity and inclusion when traveling. Providing these experiences and this commitment will continue to show travelers that the industry is working to overcome any inequities.

Family Travel

Summer Module

61%
2021

50%
2022

of likely Hawaii visitors plan to travel with children under 18 during the next 12 months

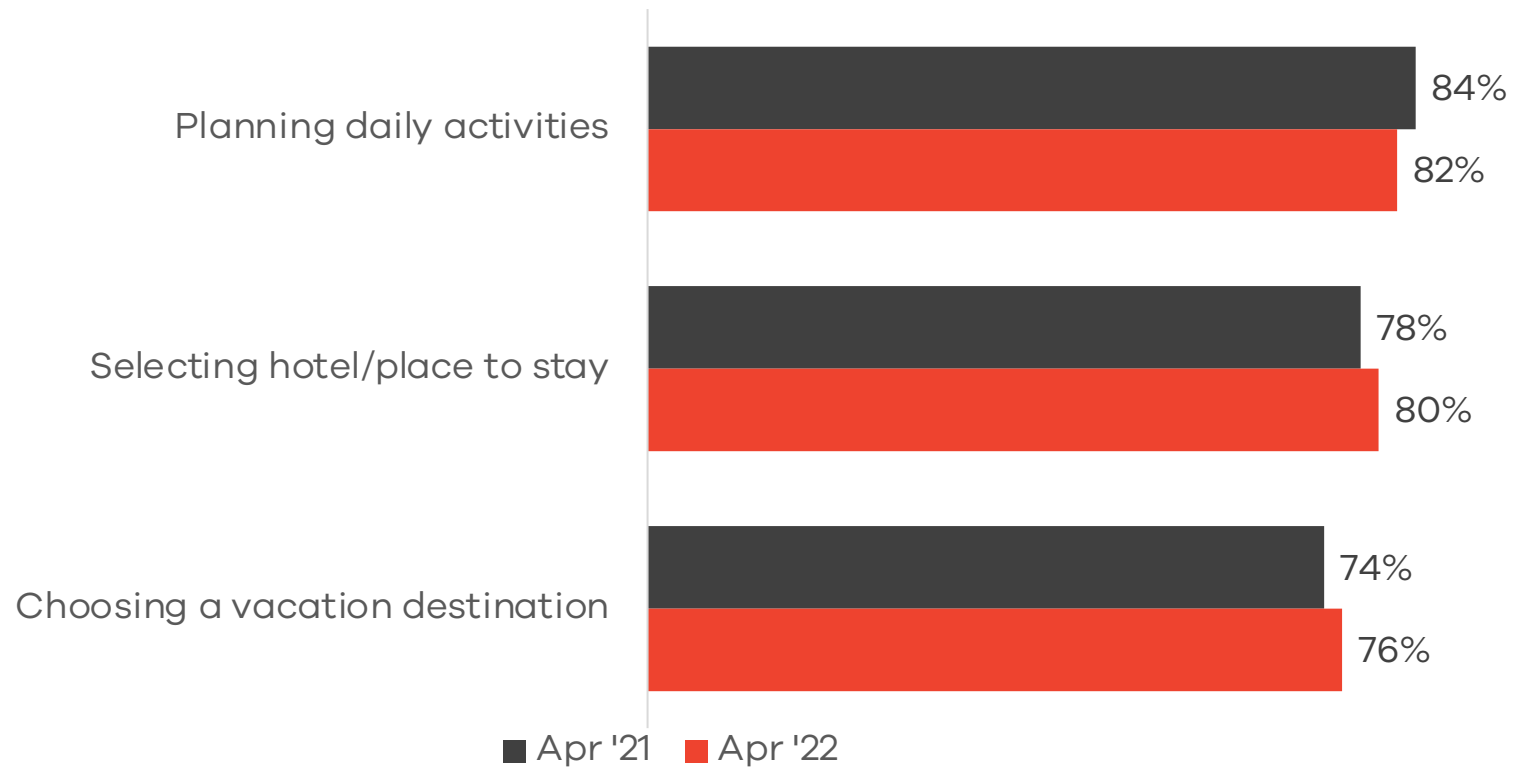
Compared to April '21, significantly fewer likely Hawaii visitors plan to travel with children during the next 12 months

Base: Likely to Visit Hawaii (n=646)

Source: MMGY Global's 2022 *Portrait of American Travelers*® "Summer Edition"

Children of Likely Hawaii Visitors Continue To Influence Their Travel Decisions.

Children's Influence When Taking a Family Vacation



Family Travel

Data in bold indicates a significant difference from February 2021.

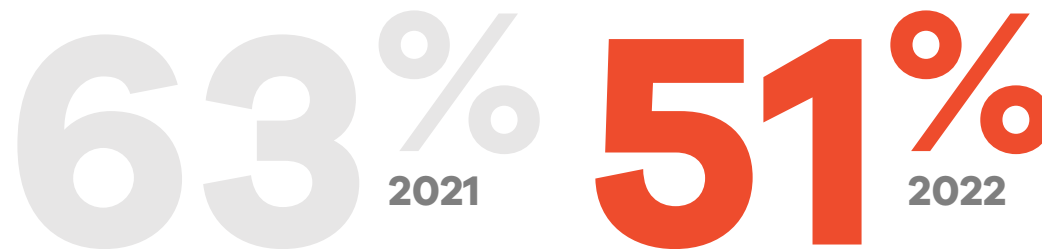
Base: Have children & Likely to Visit Hawaii (n=333)

Source: MMGY Global's 2022 *Portrait of American Travelers*® "Summer Edition"

Compared to April '21,
significantly fewer
likely Hawaii visitors
plan to take a
multigenerational
trip in the next 12
months.

Base: Likely to Visit Hawaii (n=646)

Source: MMGY Global's 2022 *Portrait of American Travelers* "Summer Edition"



of likely Hawaii visitors plan to travel with
three or more generations of your family in
the next 12 months

Family Travel



FAMILY TRAVEL SUMMARY

KEY TAKEAWAY:

- Half of Likely Hawaii Visitors are planning to travel with children in the next 12 months, down from the percentage who planned to do so in April 2021. Their children play a role in their vacation planning, with 8 in 10 indicating their children influence their choice of daily activities and accommodations and three-quarters play a role in choosing the destination.
- Half are also planning to take a multigenerational trip in the next 12 months, again down from the percentage who planned to do so last year.

WHAT IT MEANS:

Although the percentage of Likely Hawaii Visitors who are planning to travel with their children in the next year decreased from last year, those who are still doing so are greatly influenced by their children when planning.

Travel Advisors

Summer Module

54% 2021 44% 2022

of likely Hawaii visitors have used the services of a travel advisor during the past 2 years

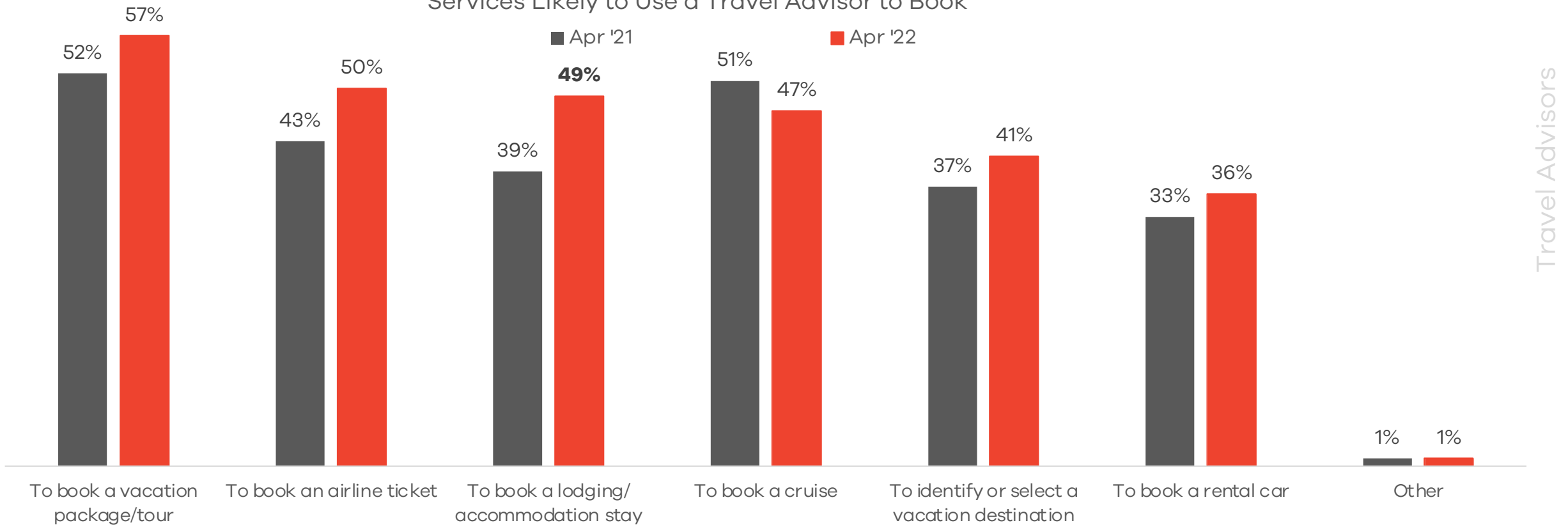
62% 2021 51% 2022

of likely Hawaii visitors plan to use the services of a travel advisor during the next 2 years

Significantly fewer likely Hawaii visitors have used or are planning to use the services of a travel advisor compared to last year.

Likely Hawaii Visitors are Using Travel Advisors to Book Vacation Packages and Tours.

Services Likely to Use a Travel Advisor to Book



Data in bold indicates a significant difference from April 2021.

Base: Plan to use a Travel Advisor & Likely to Visit Hawaii (n=328)

Source: MMGY Global's 2022 *Portrait of American Travelers*® "Summer Edition"

Likely Hawaii Visitors Are Using Travel Advisors for Trendy Recommendations, and To Provide Help and Peace of Mind When Traveling.

Reasons to Use a Travel Advisor	Apr '21	Apr '22
To get recommendations on the hottest/trending places to visit	36%	51%
To get the best prices for a vacation	42%	48%
To have peace of mind that what I'm booking is the experience I expect it will be	31%	46%
They provide help if things go wrong	28%	46%
To take the time and hassle out of researching and booking travel	36%	39%
To gain access to experiences I can't get on my own	23%	37%
Other	22%	1%

Data in bold indicates a significant difference from April 2021.

/ Although fewer of those likely to visit Hawaii have used or plan to use the services of a travel advisor compared to last year, more of those who are using them are doing so to get recommendations on the hottest destinations, to have peace of mind, help when things go wrong, and to gain access to experiences they can't on their own.

Travel Advisors

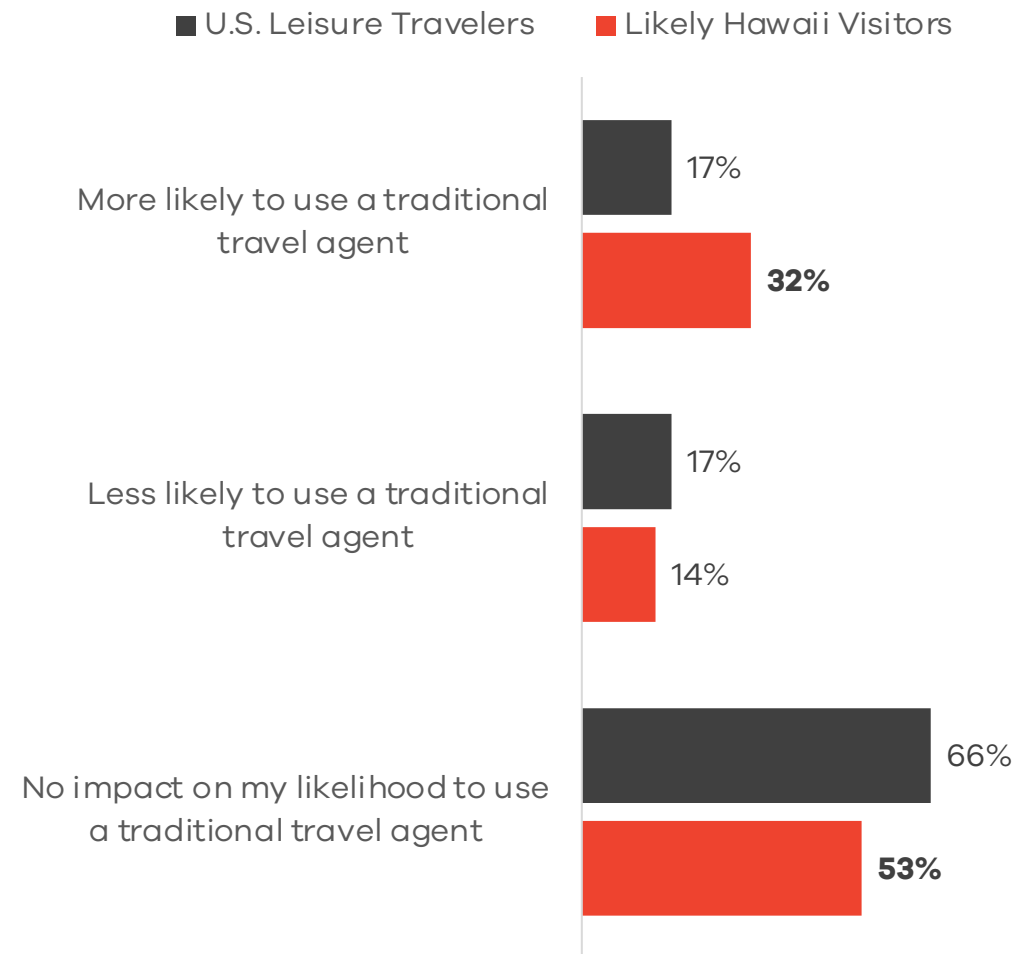
Significantly more likely Hawaii visitors than the average U.S. leisure traveler indicate that the pandemic caused them to be more likely to use a travel advisor in the future.

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

Base: U.S. Leisure Travelers (3,639), Likely to Visit Hawaii (n=646)

Source: MMGY Global's 2022 *Portrait of American Travelers* "Summer Edition"

Impact the COVID-19 Pandemic Has Had on Likelihood to Use a Travel Advisor to Book Travel in the Future





TRAVEL ADVISORS SUMMARY

KEY TAKEAWAY:

- Half of Likely Hawaii Visitors are planning to use a travel advisor in the next 12 months, down from the percentage who was planning to use one in April 2021. They're using travel advisors to book vacation packages, airlines tickets, and accommodations (significantly more than did so last year). They choose to use travel advisors because they can provide recommendations on the trendiest destinations, the best prices, and peace of mind when booking.
- The pandemic has impacted the likelihood of nearly half of Likely Hawaii Visitors to book with travel advisors in the future with one-third indicating they're more likely to book with a travel advisor, while only 14 percent said they're less likely to book with a travel advisor.

Traveler Perspectives

Summer Module

Compared to April '21, Likely Hawaii Visitors are feeling more optimistic about their own future and the future of the company they work for but less optimistic about the future of their children. They also display the least amount of optimism for the future of the U.S. and the world.



Traveler Perspectives

* Among those with children

** Among those who are employed

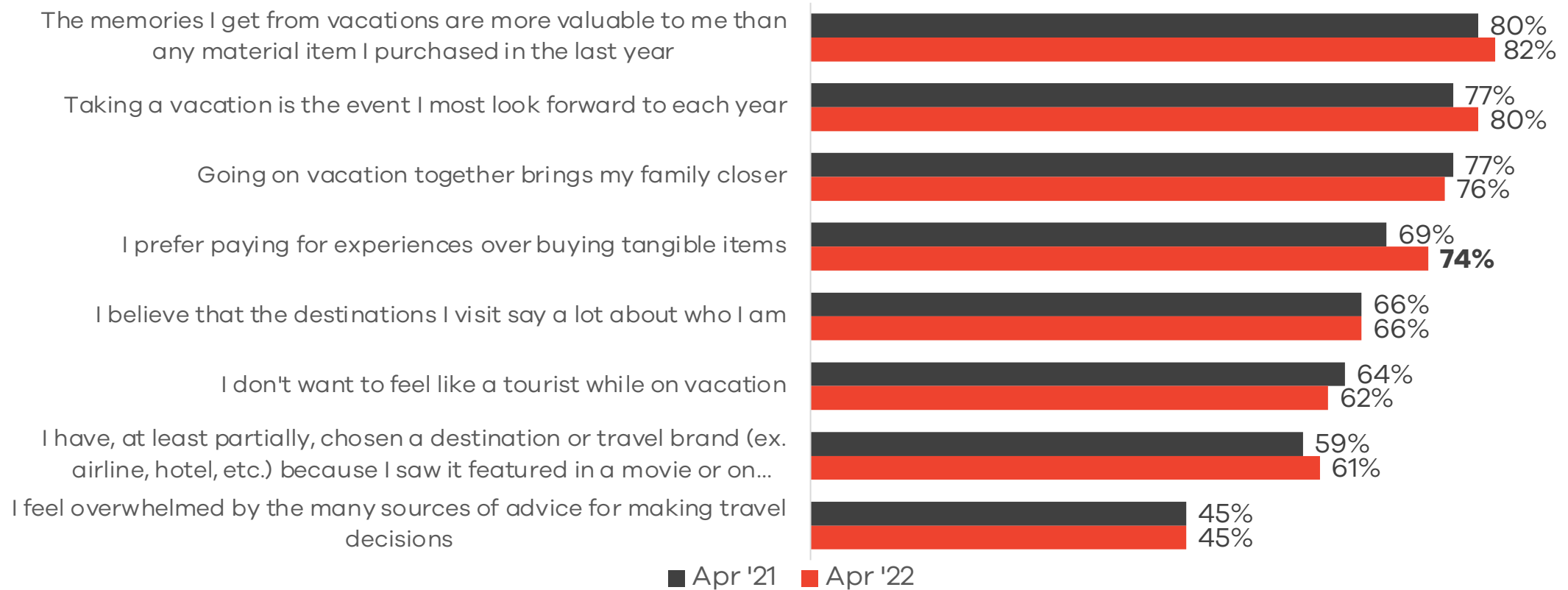
Data in bold indicates a significant difference from April 2021.

Base: Likely to Visit Hawaii (n=646)

Source: MMGY Global's 2022 *Portrait of American Travelers*® "Summer Edition"

Likely Hawaii Visitors Are Looking For Experiences and To Make Memories When on Vacation

% Agree with Statements



Traveler Perspectives

Data in bold indicates a significant difference from April 2021.

Base: Likely to Visit Hawaii (n=646)

Source: MMGY Global's 2022 *Portrait of American Travelers*® "Summer Edition"

Luxury Travel

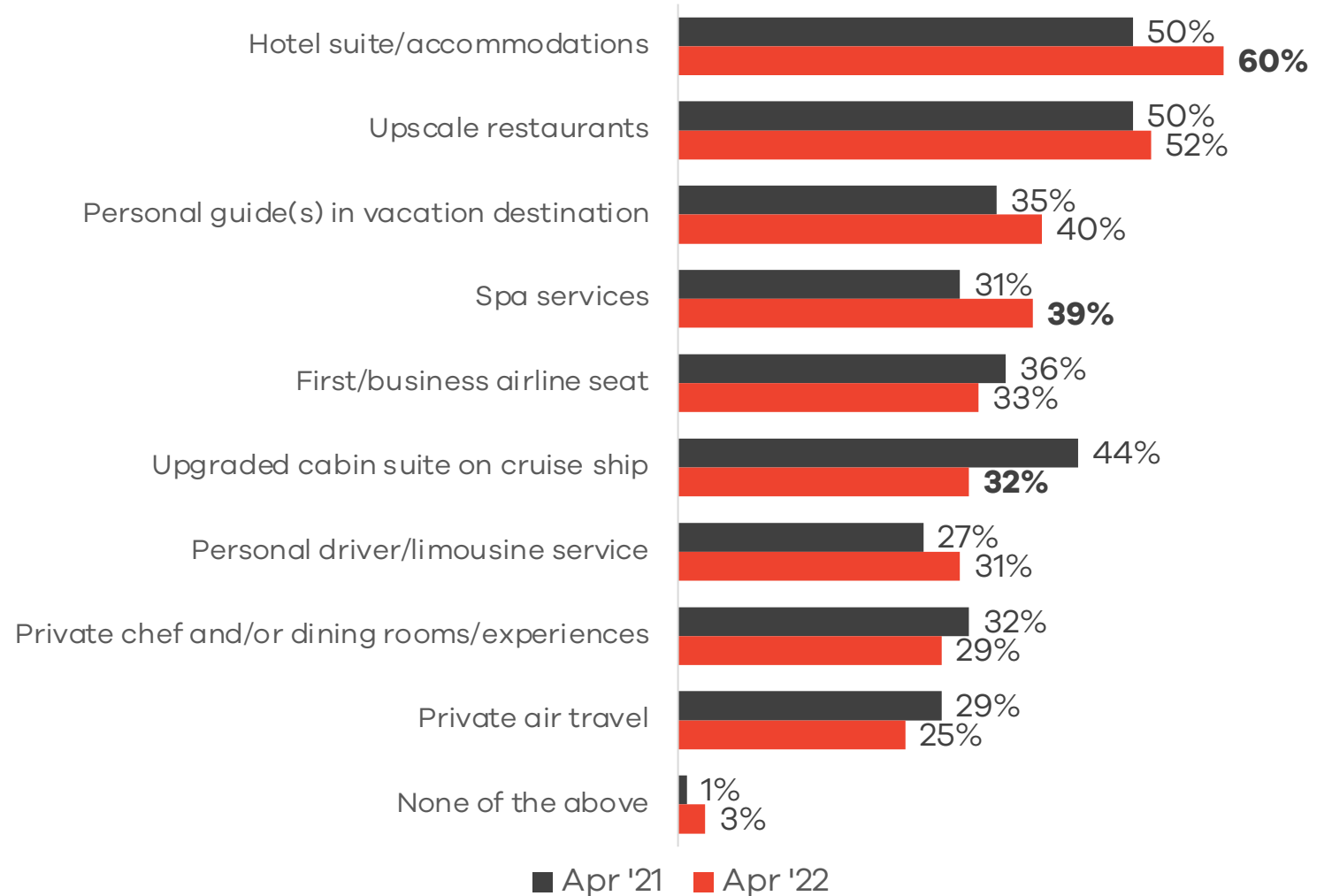
73%
2022

Agree: **I enjoy being treated like a VIP.**
(vs. 72% in 2021)

57%
2022

Agree: **I consider myself to be a luxury traveler.**
(vs. 59% in 2021)

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



Traveler Perspectives



TRAVELER PERSPECTIVES SUMMARY

KEY TAKEAWAY:

- Nearly 9 in 10 Likely Hawaii Visitors feel optimistic about their own future (up from last year) and the future of their children (down from last year), while only two-thirds feel optimistic about the future of the U.S. and nearly 6 in 10 feel so about the future of the world.
- About 8 in 10 Likely Hawaii Visitors indicate that the memories they get from their vacations are more valuable to them than any tangible item they purchased in the last year, taking a vacation is the event they most look forward to each year, and that vacations bring their family closer.

WHAT IT MEANS:

Despite tensions and instability in the world and lower optimism for its future, travel will continue to be a priority for Likely Hawaii Visitors.

Cannabis Tourism

Summer Module

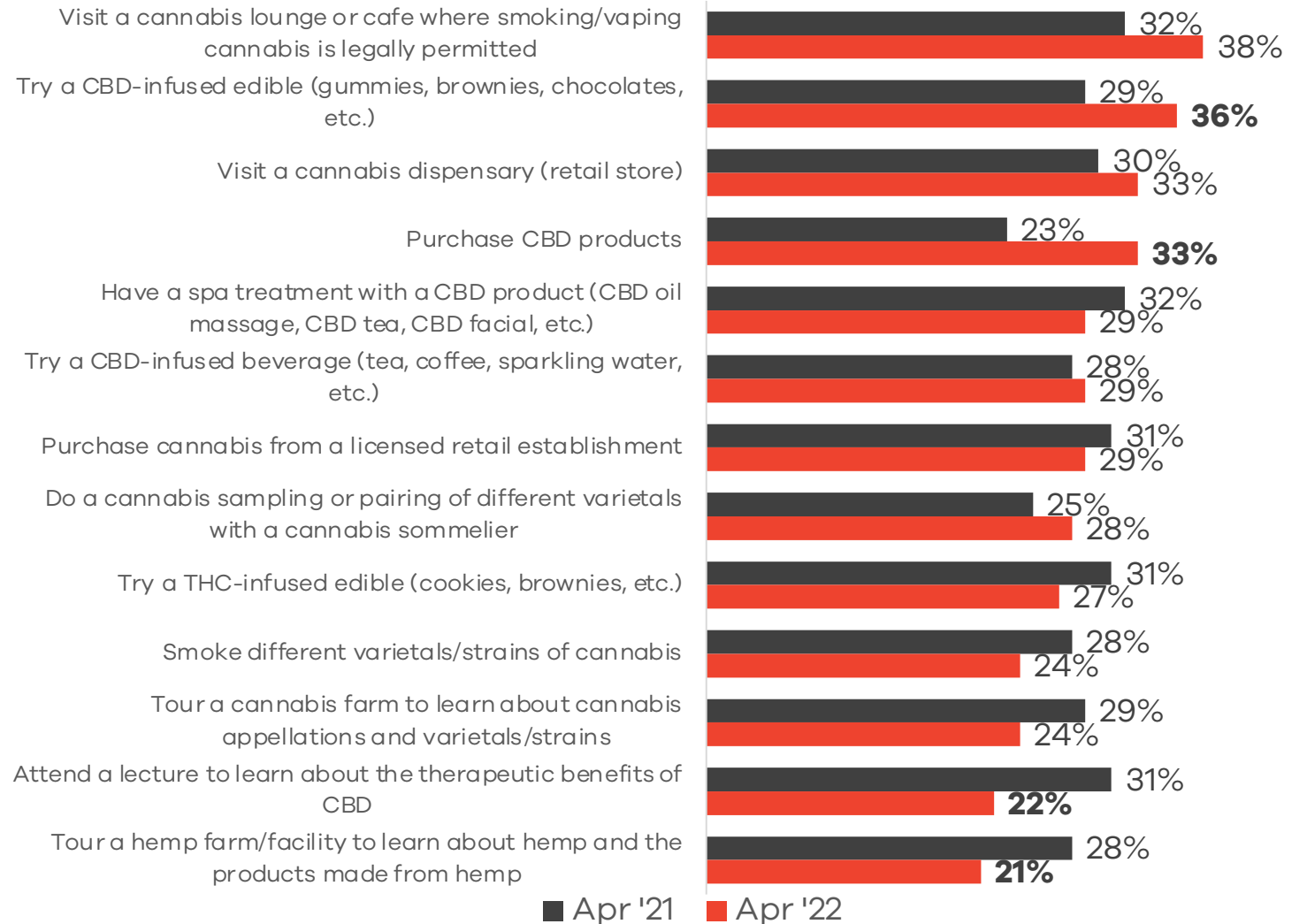
Cannabis Tourism

68%
2021

52%
2022

Of Likely Hawaii Visitors are interested in participating in at least one cannabis activity on a future vacation

Interest in Cannabis Activities
(Among those interested in at least one activity)



Cannabis Tourism

An aerial photograph of a tropical resort. In the foreground, a large, well-manicured golf course with several green fairways and palm trees is visible. To the right of the golf course is a curved, sandy beach that meets the ocean. The water is clear and blue. In the background, a dense city skyline with numerous high-rise buildings is visible along the coast. A prominent mountain, likely Diamond Head, rises in the distance behind the city. The overall scene is bright and sunny, suggesting a vacation destination.

Vacation Motivators & Activities

Traveling With A Significant Other Continues To Be The Most Popular Type of Travel Party Composition For Likely Hawaii Visitors

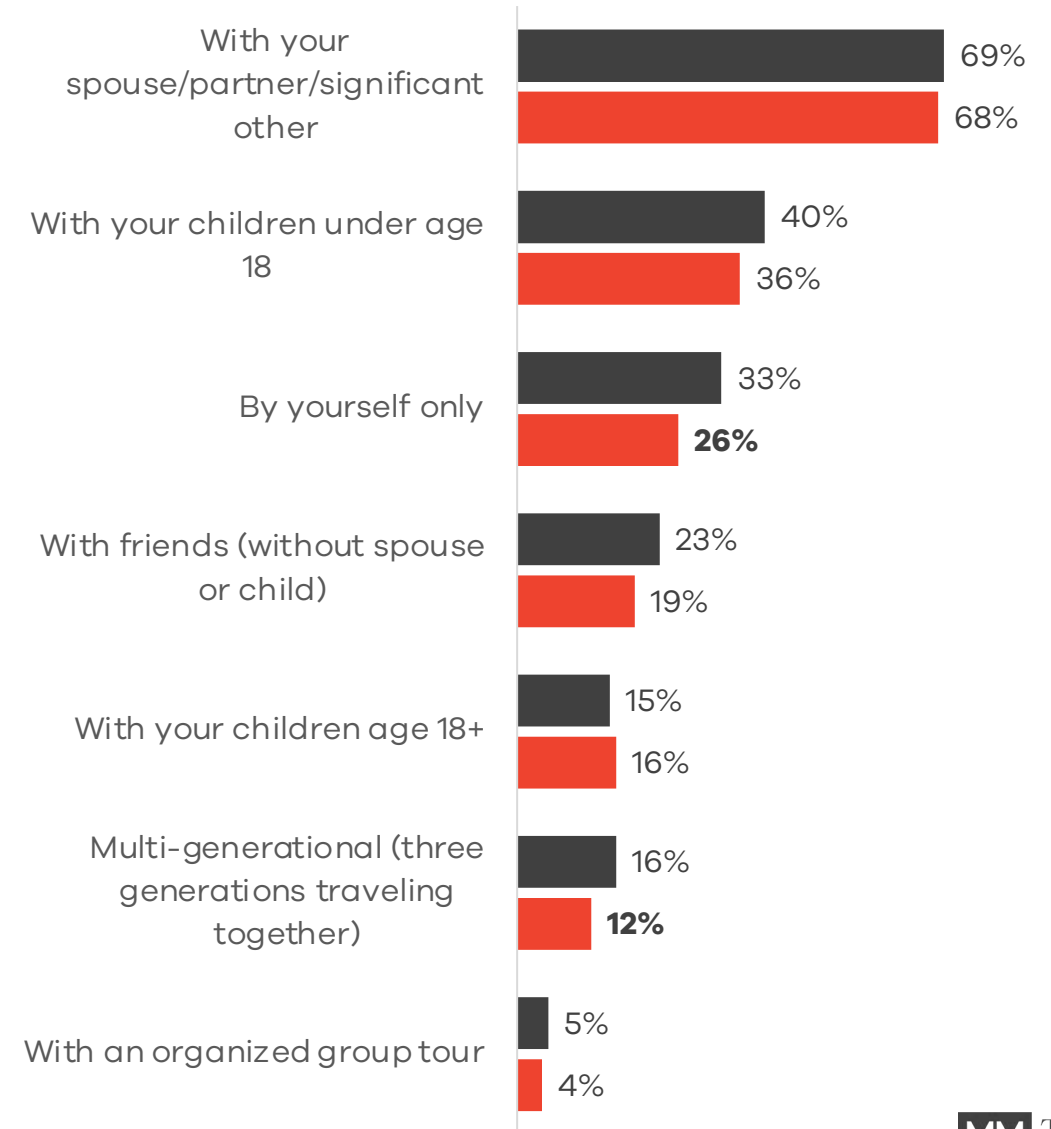
Data in bold indicates a significant difference from February 2021.

Base: Likely Hawaii visitors who intend to travel during the next six months (n=591)

Source: MMGY Global's 2022 *Portrait of American Travelers* "Summer Edition"

Travel Party During Next Six Months

■ Apr '21 ■ Apr '22



Significantly More Likely Hawaii Visitors Are Planning to Stay in a Hotel, Take a Domestic Flight and Take an International Trip in The Next 6 Months Than Planned To Do So in April '21

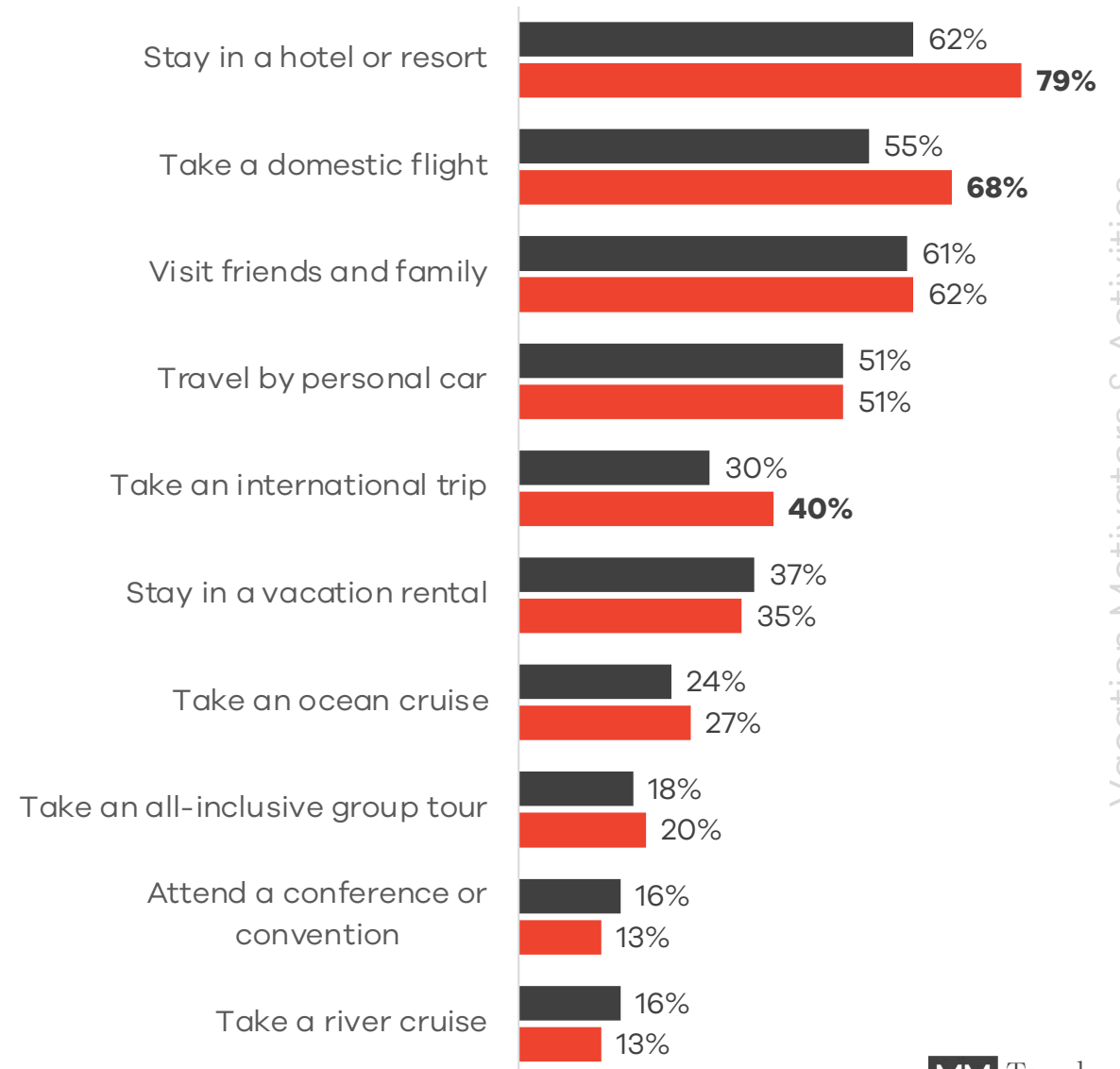
Data in bold indicates a significant difference from April 2021.

Base: Likely Hawaii visitors who intend to travel during the next six months (n=591)

Source: MMGY Global's 2022 *Portrait of American Travelers* "Summer Edition"

Travel Expectations in the Next 6 Months

■ Apr '21 ■ Apr '22



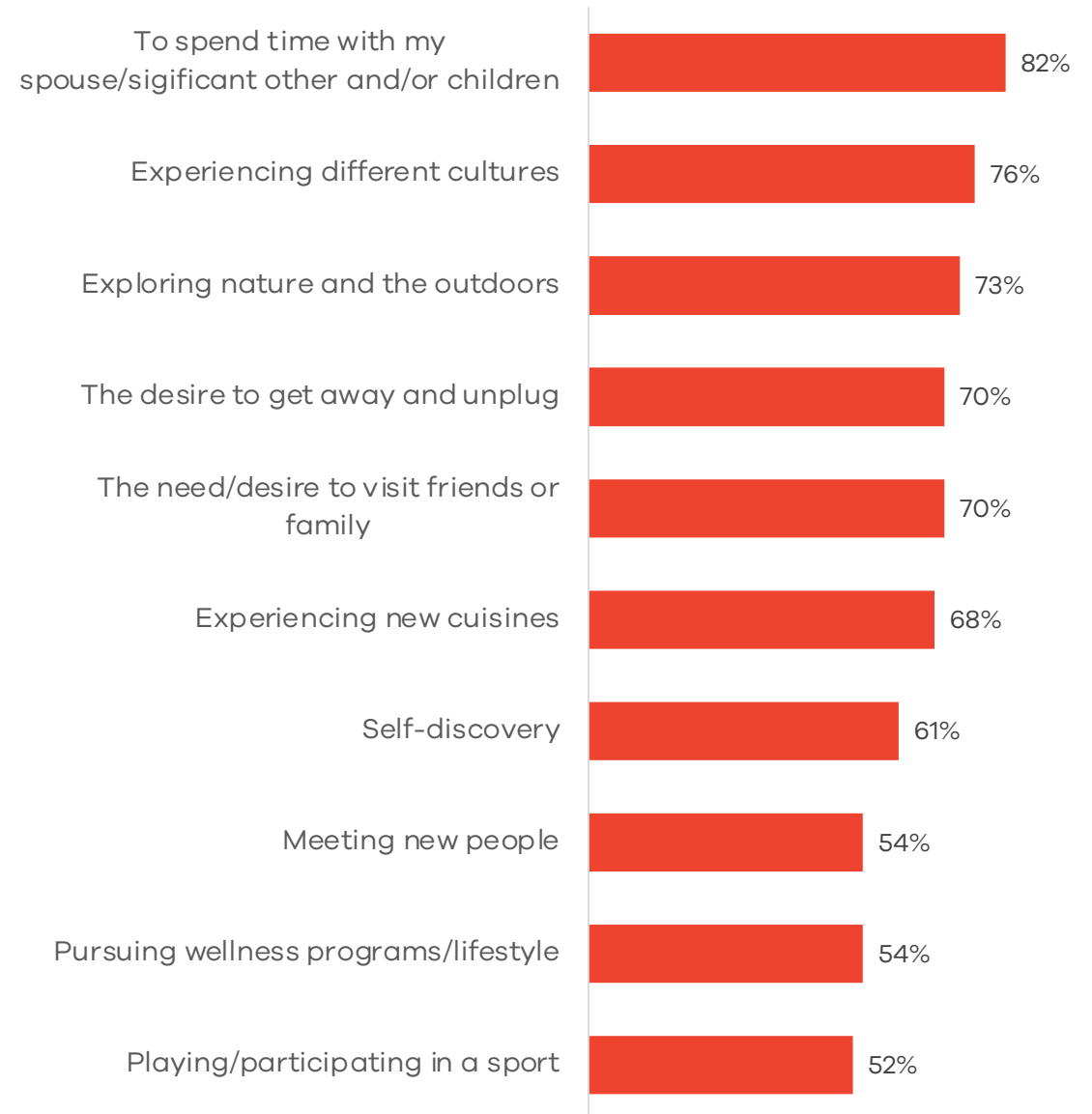
Vacation Motivators & Activities

Spending Time with Family, Experiencing Different Cultures, and Exploring Nature Are The Top Reasons Those Likely to Visit Hawaii Travel

Base: Likely to Visit Hawaii (n=646)

Source: MMGY Global's 2022 *Portrait of American Travelers*® "Summer Edition"

Vacation Motivators



Vacation Motivators & Activities

What Destination Attributes Influence Choice of Destination?

Influential When Selecting a Destination	Apr '21	Apr '22
Beautiful scenery	57%	64%
Food and drink scene	55%	57%
Safety	49%	54%
Outdoor/nature activities	40%	49%
Historical significance of a destination	42%	45%
Focus on family activities	32%	35%
A sense of tradition (place family has traditionally visited)	30%	29%
The ethnic diversity and multicultural population of a destination	30%	29%
The destination's reputation for environmental responsibility	23%	25%
Music scene	27%	24%
Nightlife/bars	29%	21%
The destination's commitment to social justice and equality	19%	18%
LGBTQ+ travel offerings	12%	10%

Data in bold indicates a significant difference from April 2021.

/ Beautiful scenery is the top feature travelers look for when selecting a destination, increasing in influence from last year. Significantly more likely Hawaii visitors are also influenced by outdoor/nature activities when selecting a destination, while fewer are influenced by nightlife/bars.

Activities of Interest on Vacation

	Apr '21	Apr '22
Beach experiences	50%	54%
Historical sites	38%	47%
Visiting a state or national park	37%	43%
Shopping	46%	42%
Visiting a museum	35%	38%
Visiting a theme or amusement park	31%	35%
Hiking/climbing/biking/other outdoor adventures	29%	33%
Guided tours with access to local experiences that are otherwise inaccessible	35%	32%
Visiting notable architectural sites	34%	31%
Casino gambling	27%	30%
Attending a sporting event	19%	30%
Adventure travel (safaris, mountain climbing, trekking vacations, etc.)	29%	29%
Water sports (waterskiing, boating/rafting)	23%	26%
Attending a concert/music festival	27%	24%
Exploring family's ancestry/past on a heritage vacation	28%	23%
Nightlife	36%	23%
Spa Services (massages, facials, etc.)	NA	23%
Film/art festivals	23%	20%
Playing golf	19%	19%
Attending performing arts events	23%	18%
Snow skiing/snowboarding	17%	16%
Playing tennis	14%	14%
Scuba diving	20%	13%
Surfing	16%	13%

- / Beach experiences, historical sites, visiting a state or national park, and shopping are the top activities of interest among likely Hawaii visitors on vacation.
- / Interest in historical sites, visiting a state or national park, and attending a sporting event all increased in interest from April '21.

Vacation Motivators & Activities

Data in bold indicates a significant difference from April 2021.

Base: Likely to Visit Hawaii (n=646)

Source: MMGY Global's 2022 *Portrait of American Travelers*® "Summer Edition"



VACATION MOTIVATORS & ACTIVITIES SUMMARY

KEY TAKEAWAY:

- The short-term travel plans of those likely to visit Hawaii include staying in a hotel or resort, taking a domestic flight, and visiting friends and family. 7 in 10 of these travelers are planning to travel with their significant other while nearly 4 in 10 plan to travel with their children. Compared to April '21, significantly more of these travelers plan to stay in a hotel or resort, take a domestic flight, or take an international trip.
- Likely Hawaii Visitors are taking vacations to spend time with family, experience different cultures, and to explore nature. They're influenced by a destination's beautiful scenery, food and drink scene, and perceived safety. On vacation they're most interested in beach experiences, visiting historical sites or national/state parks, and shopping.

Destinations of Interest

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

Top 20 States of Interest	Apr '21	Apr '22
California	75%	74%
Florida	70%	73%
Alaska	64%	64%
Nevada	61%	64%
New York	68%	63%
Arizona	57%	62%
Colorado	65%	60%
Texas	66%	57%
Washington	54%	55%
Georgia	55%	47%
South Carolina	55%	47%
Maine	49%	44%
Utah	48%	46%
North Carolina	50%	46%
Tennessee	50%	46%
Wyoming	48%	44%
New Mexico	51%	44%
Louisiana	53%	43%
Oregon	52%	43%
Massachusetts	47%	43%

Destinations of Interest

Base: Likely to Visit Hawaii (n=646)

Source: MMGY Global's 2022 Portrait of American Travelers® "Summer Edition"

Data in bold indicates a significant difference from April 2021.

Other Than Hawaii Destinations, Likely Hawaii Visitors Are Also Interested in Visiting Las Vegas and The Florida Keys/Key West.

Top 20 Destinations of Interest	Apr '21	Apr '22
Honolulu, HI	79%	79%
Kaua'i, HI	73%	79%
Island of Hawai'i	78%	77%
Maui, HI	79%	73%
Las Vegas, NV	69%	70%
Florida Keys/Key West, FL	66%	68%
San Diego, CA	65%	63%
New York City, NY	62%	62%
San Francisco, CA	69%	62%
Los Angeles, CA	66%	61%
New Orleans, LA	65%	60%
Napa Valley, CA	65%	60%
Orlando, FL	68%	59%
Tampa, FL	63%	58%
Phoenix/Scottsdale, AZ	62%	58%
Palm Springs, CA	62%	58%
Miami, FL	63%	57%
Panama City Beach, FL	57%	57%
Washington, DC	62%	57%
Fort Lauderdale, FL	59%	55%

Destinations of Interest

Base: Likely to Visit Hawaii (n=646)

Data in bold indicates a significant difference from April 2021.

Source: MMGY Global's 2022 Portrait of American Travelers® "Summer Edition"

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

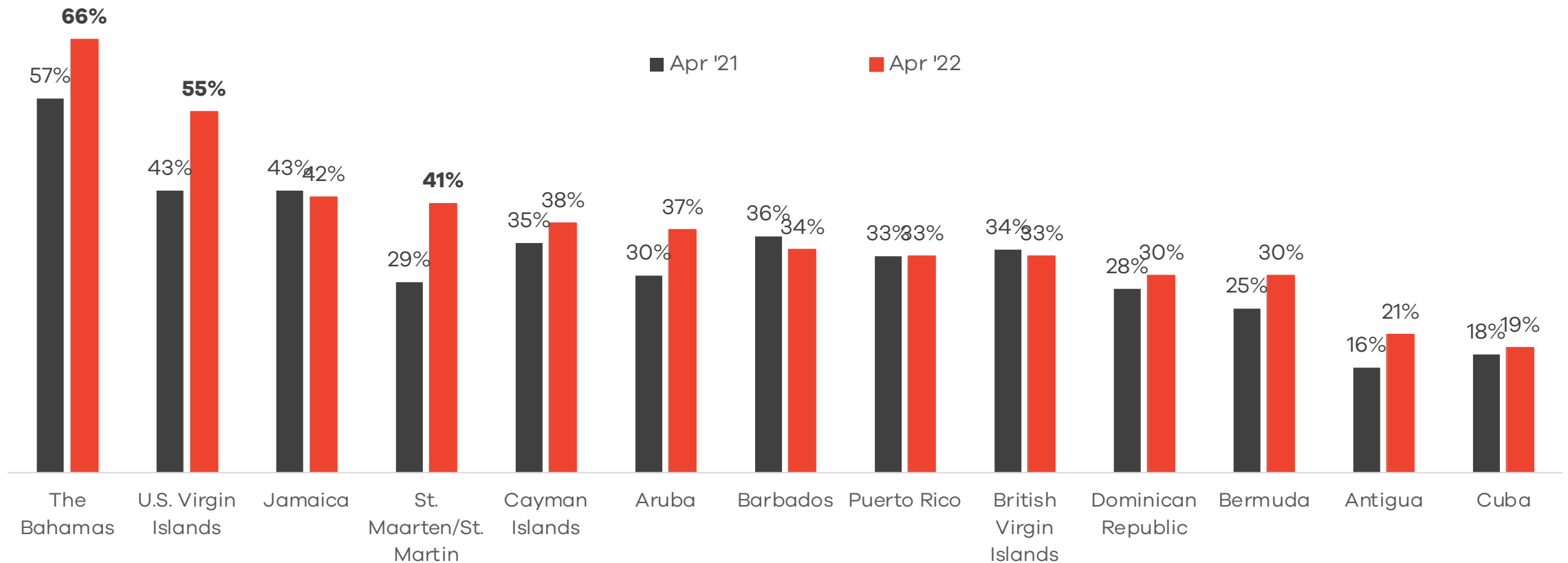
International Destinations of Interest	Apr '21	Apr '22
Europe	45%	51%
The Caribbean	35%	42%
Canada	32%	38%
Mexico	37%	33%
Oceania	20%	24%
Asia	22%	19%
South America	20%	18%
Central America	25%	15%
Middle East	10%	7%
Africa	8%	7%

Data in bold indicates a significant difference from April 2021.

Destinations of Interest

The Top Caribbean Destinations of Interest Are The Bahamas and U.S. Virgin Islands.

Caribbean Destinations of Interest



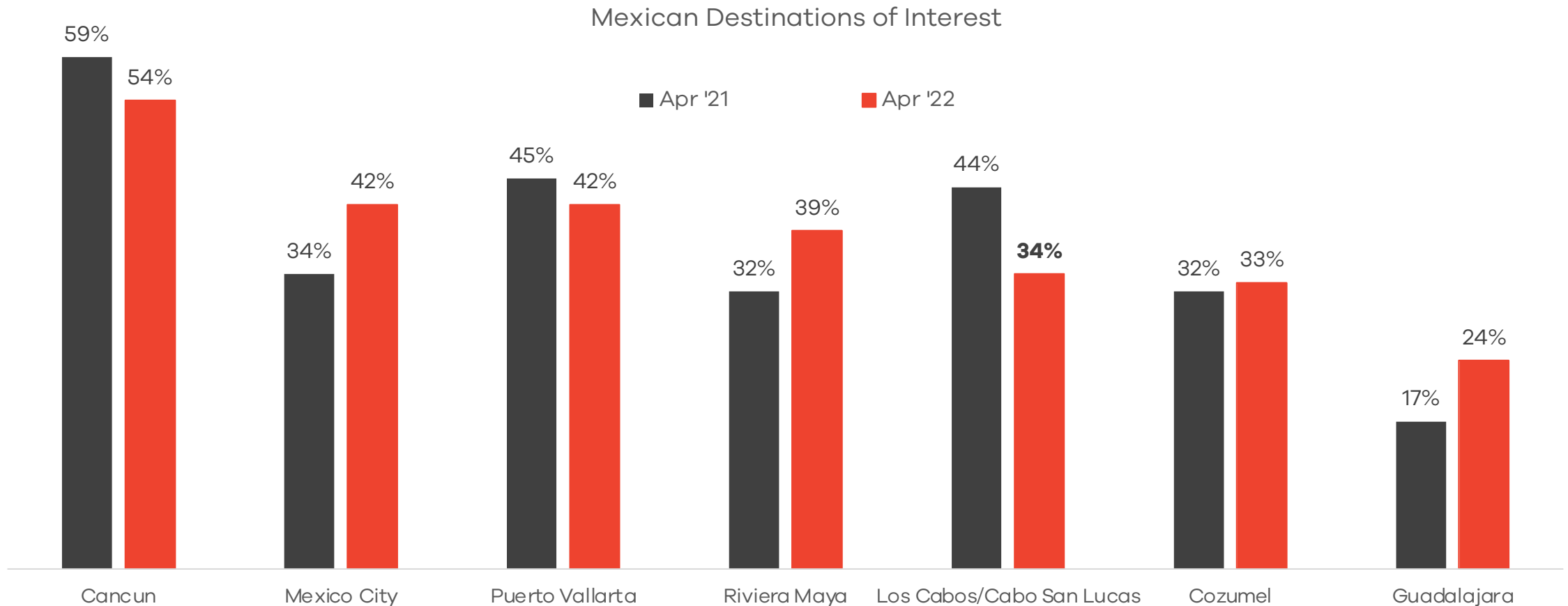
Destinations of Interest

Data in bold indicates a significant difference from April 2021.

Base: Likely to Visit Hawaii & Interested in Visiting The Caribbean (n=273)

Source: MMGY Global's 2022 Portrait of American Travelers® "Summer Edition"

The Top Mexican Destinations of Interest Are Cancun, Mexico City, and Puerto Vallarta.

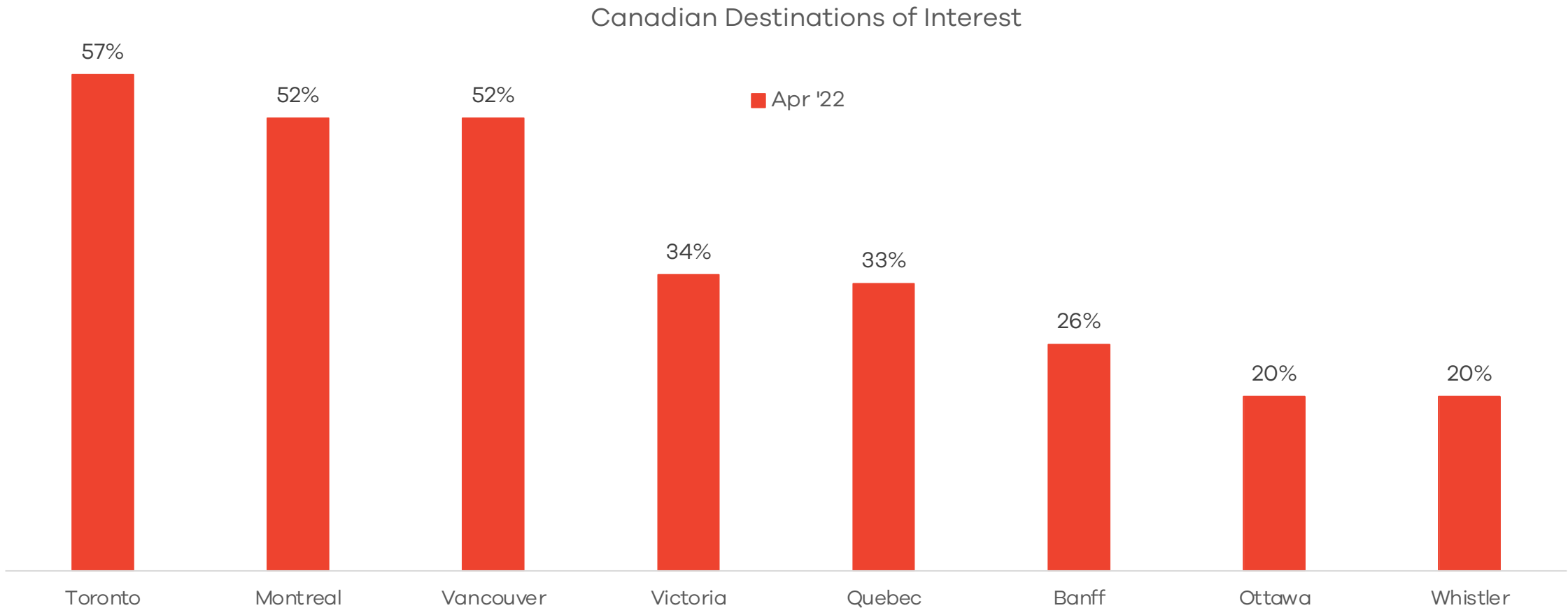


Data in bold indicates a significant difference from April 2021.

Base: Likely to Visit Hawaii & Interested in Visiting Mexico (n=211)

Source: MMGY Global's 2022 Portrait of American Travelers® "Summer Edition"

The Top Canadian Destinations of Interest Are Toronto, Montreal, and Vancouver



Base: Likely to Visit Hawaii & Interested in Visiting Canada (n=244)

Source: MMGY Global's 2022 Portrait of American Travelers® "Summer Edition"



THANKYOU

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