

PORTRAIT OF AMERICAN TRAVELERS®

Summer 2023

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Methodology

MMGY Global's *Portrait of American Travelers*® deals exclusively with leisure travel. The travel trend information presented in this report was obtained from interviews with 4,501 U.S. adults in April 2023.

This report primarily focuses on those *Likely to Visit Hawaii*, defined as those who intend to take at least one overnight leisure trip during the next 24 months, have traveled by air in the past 18 months, and likely to visit Hawaii (4 or 5 on a 5-point scale). There were a total of 708 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.

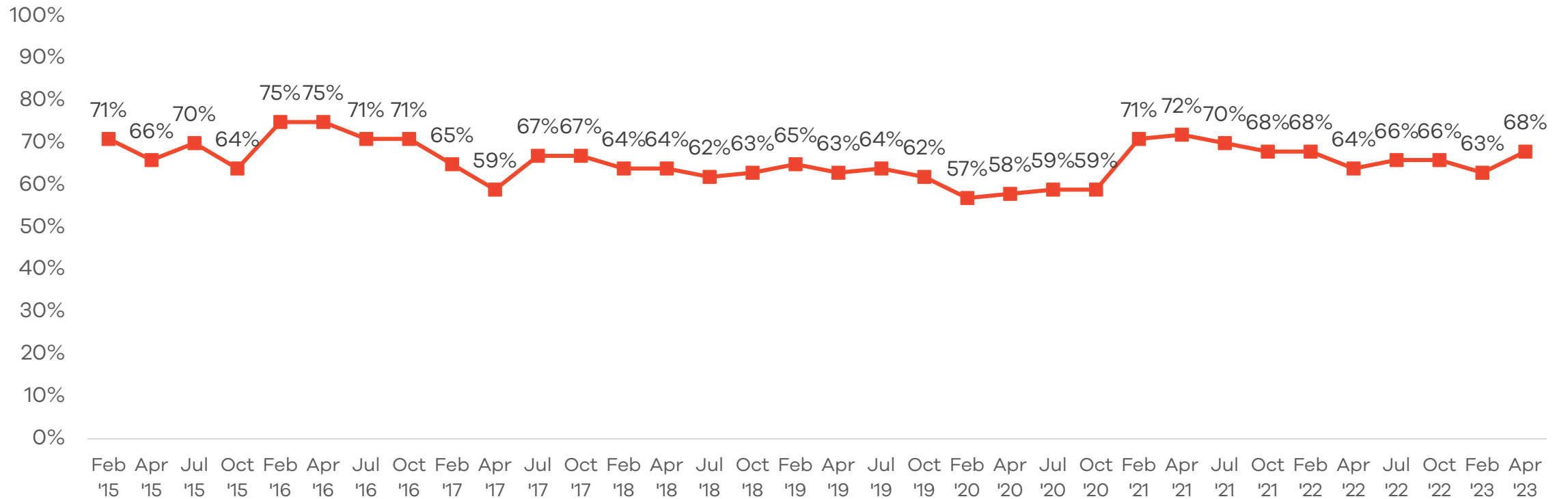
Generation	Age	% of Respondents
Gen Zs	18–24	13%
Millennials	25–40	27%
Gen Xers	41–56	25%
Boomers	57–75	30%
Silent/GI	75+	5%

Hawaii Tourism Proprietary Questions



Interest in Visiting Hawaii is Up Significantly from April '22.

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

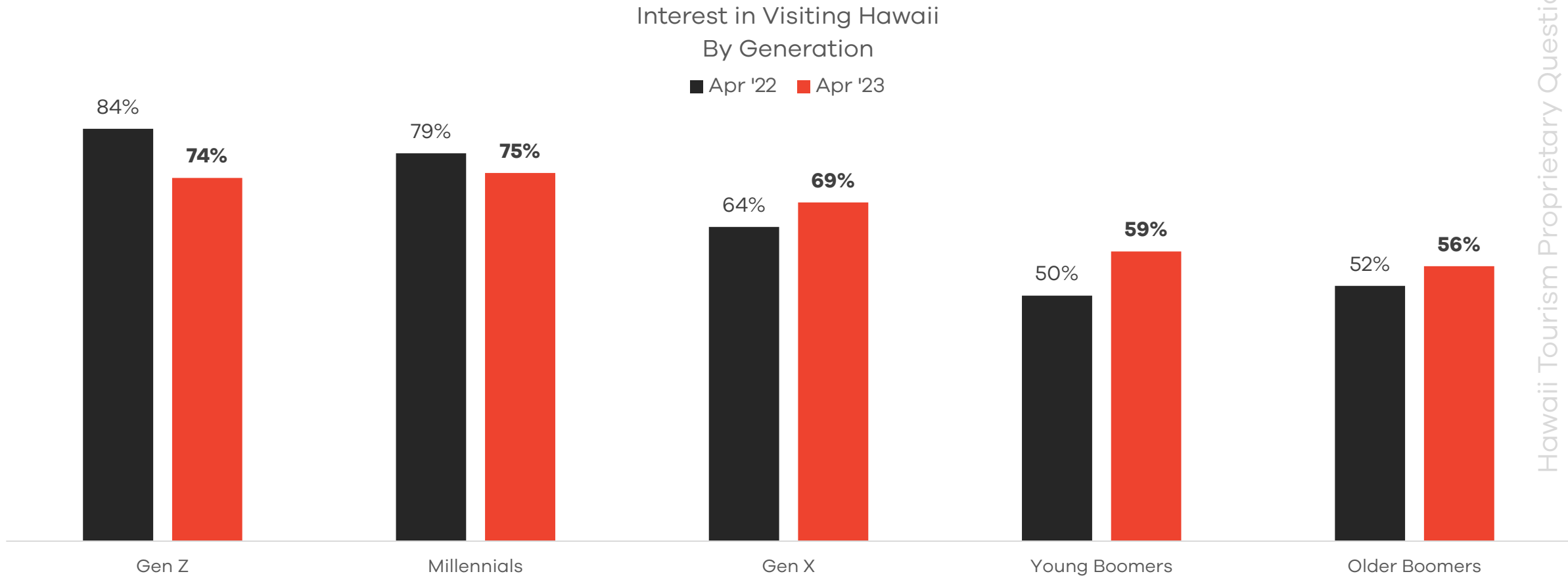


Hawaii Tourism Proprietary Questions

Base: Air Travelers (n=1,750)

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

Interest in Visiting Hawaii Dropped For Younger Generations, But Rose For Older Generations, Particularly With Young Boomers

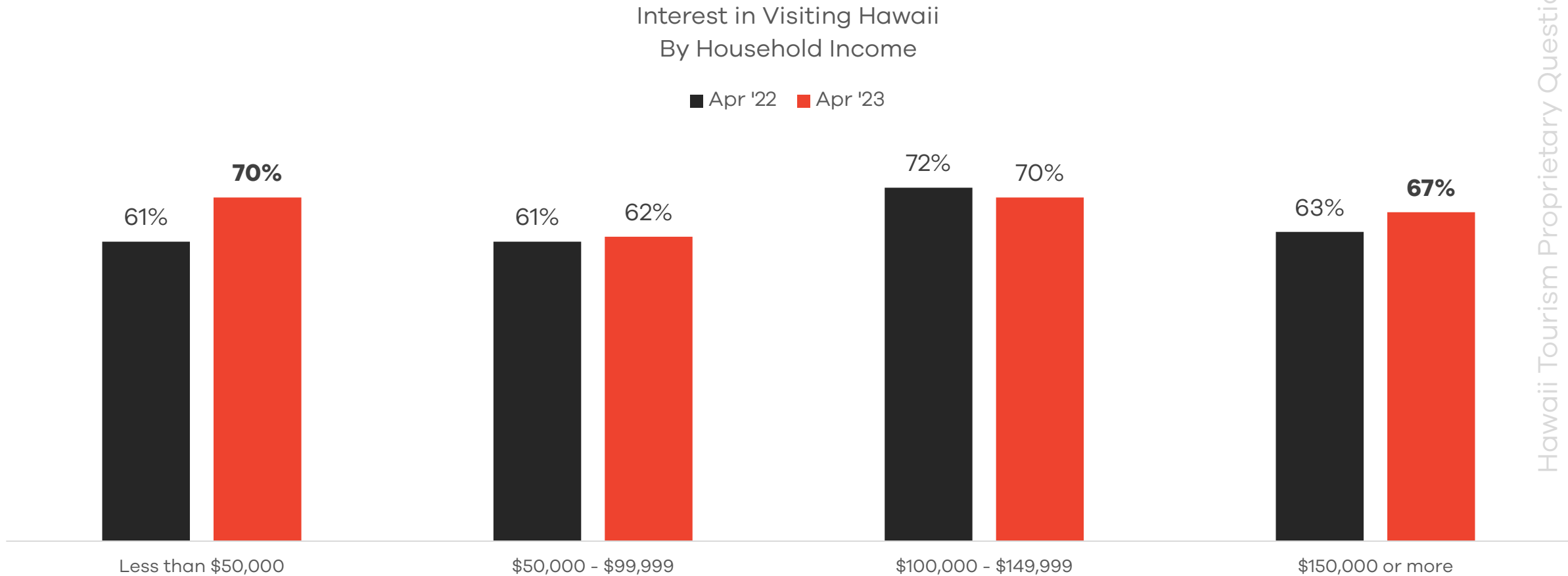


Data in bold indicates a significant difference from April 2022.

Base: Air Travelers (n=1,750)

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

Interest in Visiting Hawaii Rose Significantly For Those Who Make Less Than \$50,000 A Year And Those Who Make More Than \$150,000 A Year



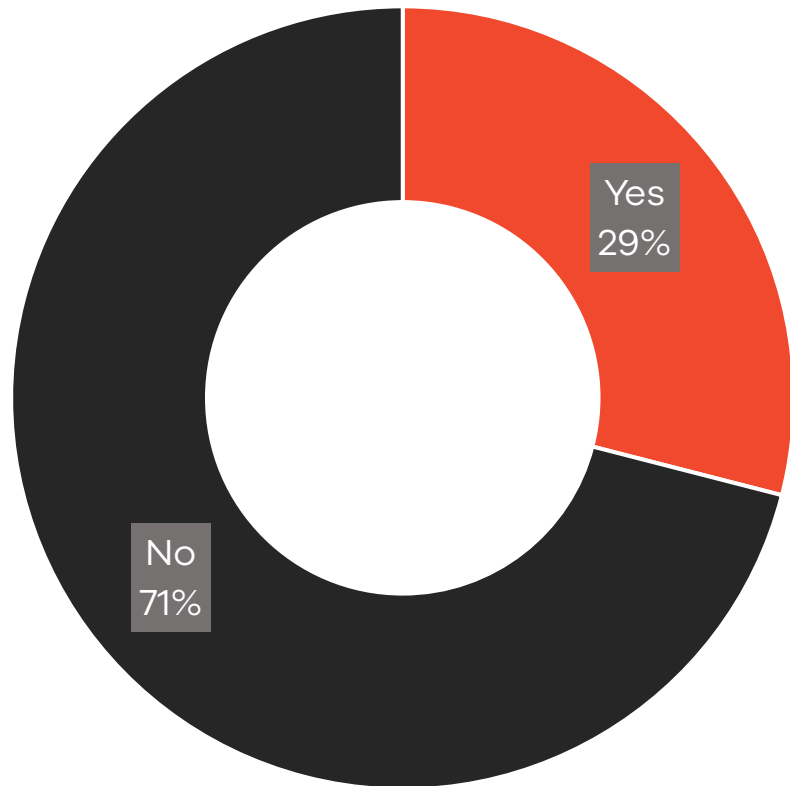
Data in bold indicates a significant difference from April 2022.

Base: Air Travelers (n=1,750)

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

The Cost to Visit Hawaii Continues To Be The Most Cited Deterrent To Visiting

Considered Visiting Hawaii But Changed Mind



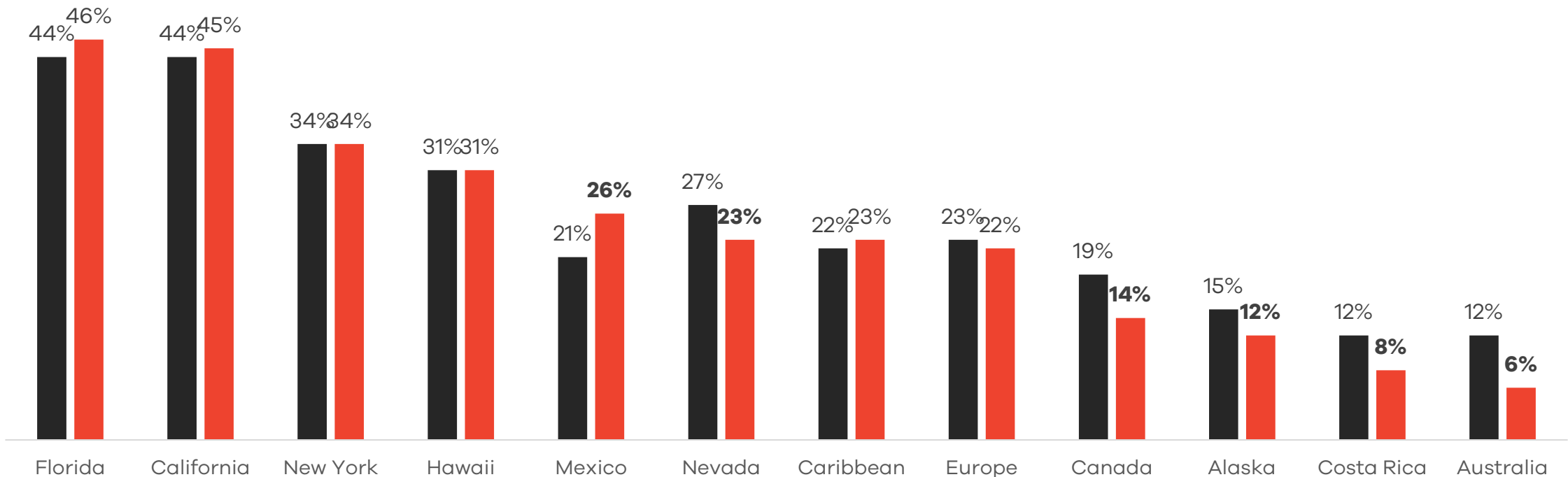
Reasons For Not Visiting Hawaii – Among Those Who Changed Their Mind	Apr '22	Apr '23
Price of airfare	35%	40%
Price of a vacation package	30%	32%
Price of the hotel	25%	32%
The flight to Hawaii is too long	20%	23%
Better value at another destination	23%	22%
Concerns about COVID-19 variants	21%	20%
Not enough time to travel to Hawaii	11%	18%
Hawaii's COVID-19 travel restrictions	27%	17%
Hawaii is too crowded	10%	13%
Already been and want to try another destination	11%	12%
Local people are not friendly	9%	10%
Accommodations were not available	12%	9%
Not sure which island(s) in Hawaii to visit	11%	9%
Hurricanes and tropical storms hitting Hawaii	9%	9%
Hawaii is not unique enough	8%	7%
Not enough activities in Hawaii	8%	6%
Hawaii is not exotic enough	6%	6%

Data in bold indicates a significant difference from April 2022.

Past Visitation To Mexico Increased From April 2023

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

■ Apr '22 ■ Apr '23



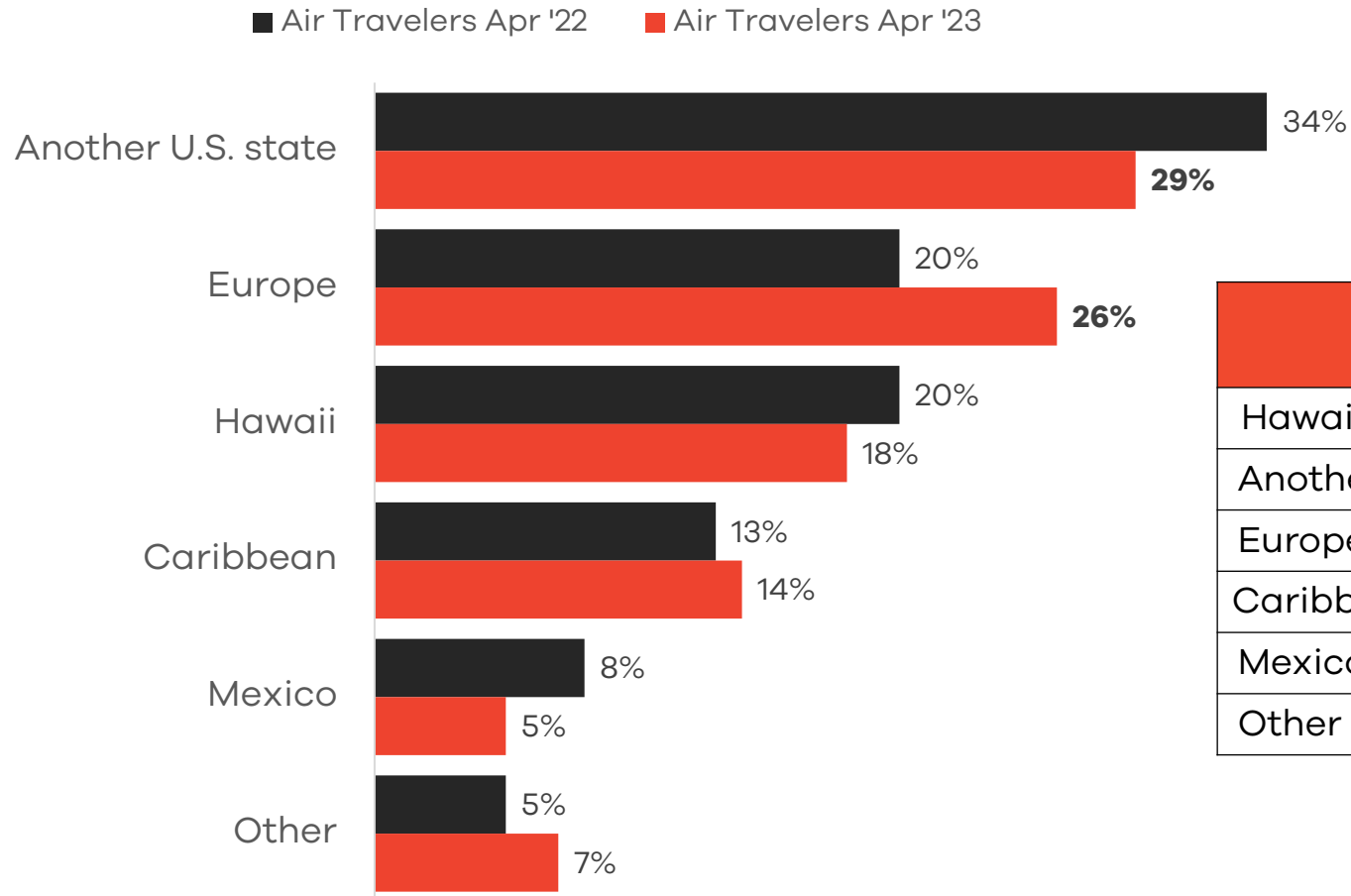
Data in bold indicates a significant difference from April 2022.

Base: Likely to Visit Hawaii (n=708)

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

Hawaii Tourism Proprietary Questions

Compared to Apr '22, More Air Travelers Are Interested in Visiting Europe 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	20%	18%	32%
Another U.S. state	32%	29%	22%
Europe	20%	26%	22%
Caribbean	13%	14%	12%
Mexico	5%	5%	7%
Other	10%	7%	4%

Data in bold indicates a significant difference from April 2022.

Base: U.S. Leisure Travelers (n=4,501), Air Travelers (n=1,750), Likely to Visit Hawaii (n=708)

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



HAWAII TOURISM PROPRIETARY SUMMARY

KEY TAKEAWAY:

- Interest in visiting Hawaii is up significantly from last year. This decrease is seen among older generations, and in those who make either less than \$50,000 a year and those who make more than \$150,000 a year.
- Among those who planned to visit Hawaii but changed their mind, the most cited reasons for doing so are the costs associated to visit Hawaii.

WHAT IT MEANS:

Interest in visiting Hawaii grew significantly this wave, though still is behind the peak of post-pandemic interest in 2021. Although COVID-19 restrictions continue to ease and this continues to decrease in concern for potential travelers, it will be important to keep an eye on rising travel prices as the cost to visit Hawaii is the most cited deterrent to visit and this could continue to grow.



The Hawaii Prospect

Self-Described Personas

	U.S. Leisure Travelers	Likely Hawaii Visitors
Beach lover	46%	58%
Foodie	40%	48%
Pet lover	40%	40%
Family traveler	36%	38%
Sports fan/enthusiast	28%	35%
Travel bargain hunter	31%	34%
Cruise lover	22%	33%
All-inclusive enthusiast	20%	32%
World traveler	20%	31%
Outdoor adventurer	28%	28%
Theme park enthusiast	22%	27%
Environmentally-conscious	23%	27%
Liberal	20%	27%
Luxury traveler	16%	26%
Moderate	24%	24%
Conservative	23%	24%
Concert/festival enthusiast	21%	23%
Wine enthusiast	17%	23%
Video game enthusiast	16%	22%
Recreational cannabis user	12%	16%
Social justice activist	7%	11%
Golf enthusiast	9%	11%
Ski/snowboard enthusiast	6%	10%
Road warrior	4%	5%

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

Base: U.S. Leisure Travelers (n=4,501), Likely to Visit Hawaii (n=708)

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

Demographics

	U.S. Leisure Travelers	Likely Hawaii Visitors
Male	48%	59%
Female	50%	41%
Other	1%	0%
Gen Zs	13%	10%
Millennials	27%	37%
Gen Xers	25%	23%
Young Boomers	18%	16%
Older Boomers	13%	11%
Have children under 18 at home	27%	37%
White	74%	70%
Hispanic	17%	15%
African American/Black	14%	16%
Asian	7%	12%
Native American	3%	1%
Pacific Islander	1%	1%
Other	5%	2%

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

Base: U.S. Leisure Travelers (n=4,501), Likely to Visit Hawaii (n=708)

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

Demographics

	U.S. Leisure Travelers	Likely Hawaii Visitors
Under \$30,000	15%	3%
\$30,000 - \$49,999	13%	7%
\$50,000 - \$74,999	18%	13%
\$75,000 - \$99,999	11%	10%
\$100,000 - \$124,999	11%	16%
\$125,000 - \$149,999	8%	11%
\$150,000 - \$249,999	19%	29%
\$250,000 - \$499,999	5%	10%
\$500,000 or more	1%	1%
4 years or less of high school	39%	21%
1-3 years of college	26%	25%
4 years of college	22%	34%
Some graduate school	2%	3%
Graduate/professional degree	10%	17%

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

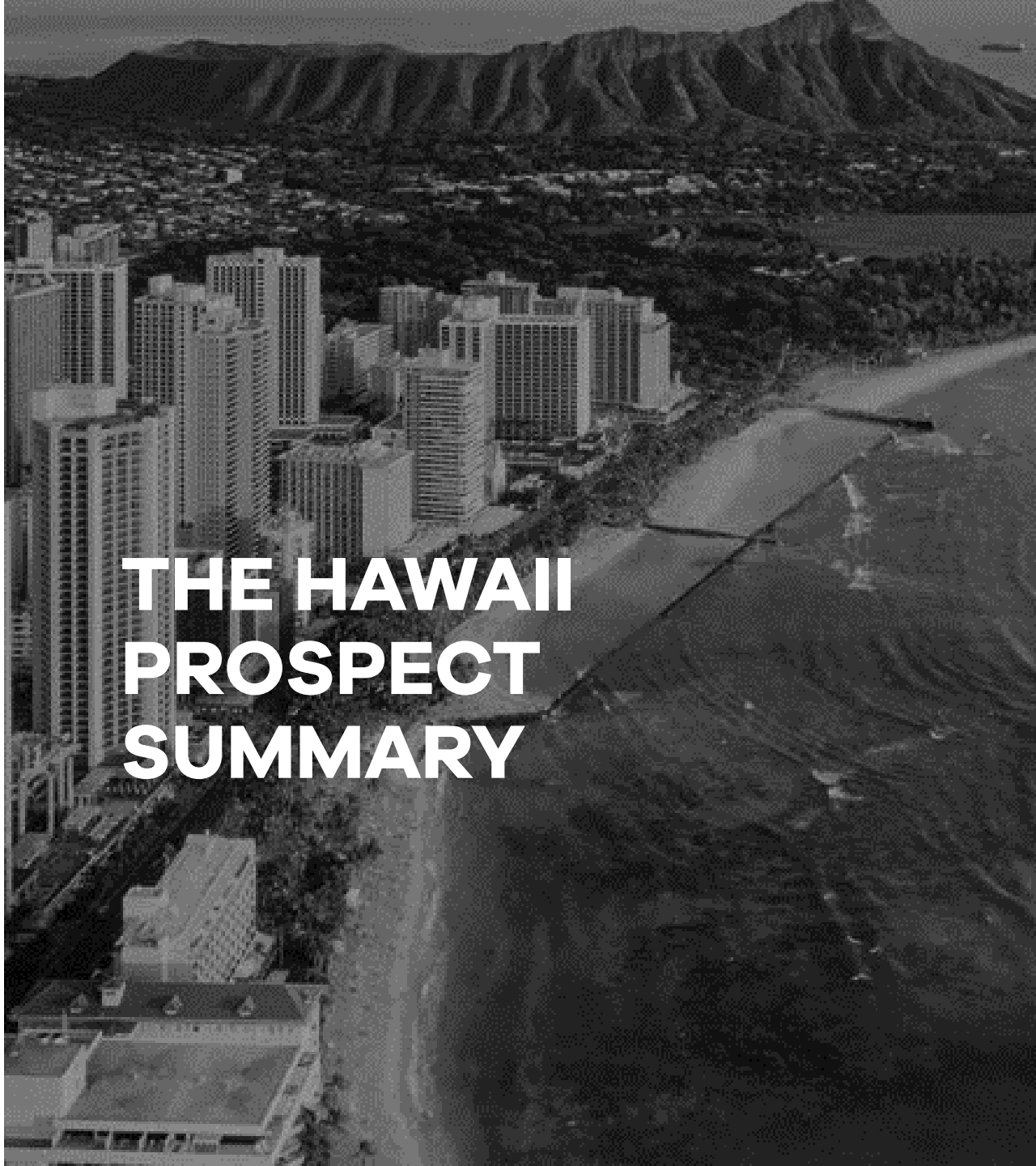
Base: U.S. Leisure Travelers (n=4,501), Likely to Visit Hawaii (n=708)

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

Demographics

	U.S. Leisure Travelers	Likely Hawaii Visitors
South	38%	34%
West	24%	35%
Midwest	21%	16%
Northeast	17%	16%
Employed (full or part-time)	54%	66%
Retired	26%	22%
Temporarily unemployed	9%	4%
Homemaker full-time	8%	5%
Student	3%	3%
Married/living together	62%	73%
Never married	26%	21%
Divorced/separated/widowed	12%	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 Lovers, Foodies and Pet Lovers. They are more likely than the average U.S. Leisure Traveler to describe themselves as a Beach Lovers, Foodies, Sports Fan Enthusiasts, Travel Bargain Hunters, Cruise Lovers, All-Inclusive Enthusiasts and World Travelers, among others.
- Compared to U.S. Leisure Travelers, Likely Hawaii Visitors are younger, well-educated, and have higher household incomes. They also are more likely to be married and have children.

WHAT IT MEANS:

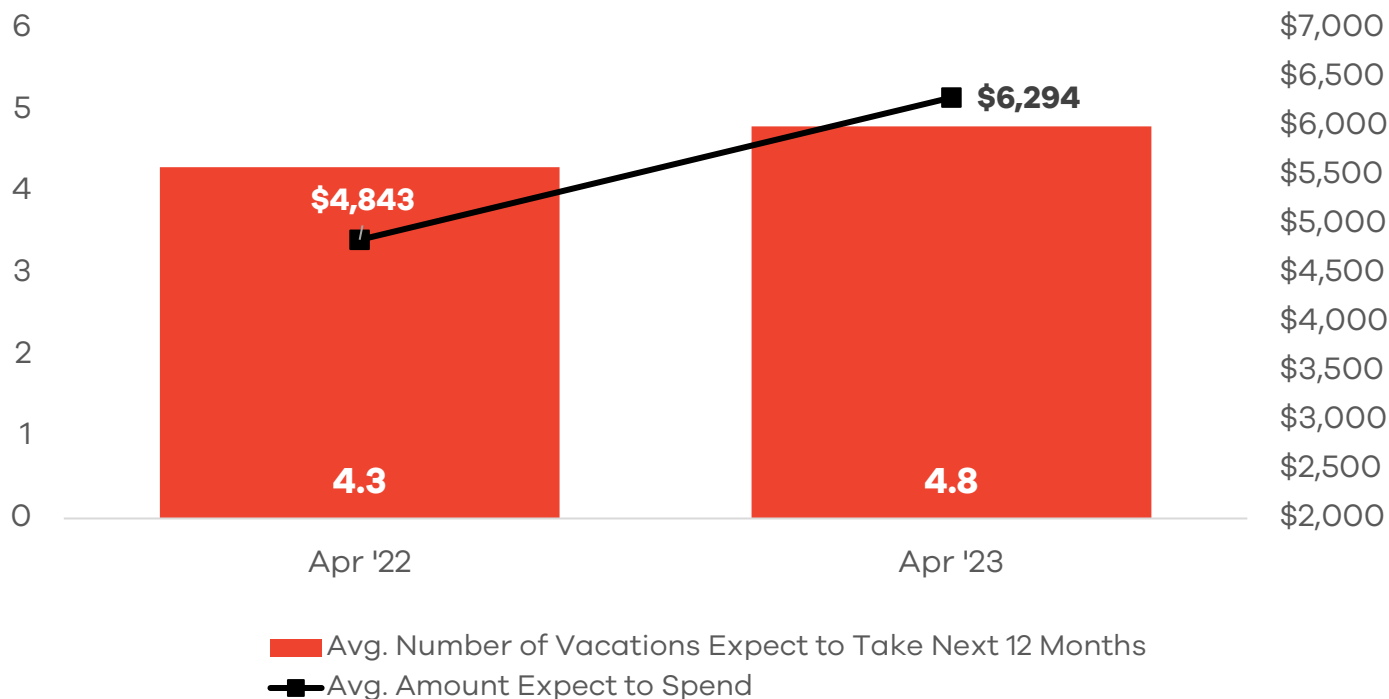
Not only do these travelers have a high level of interest in visiting Hawaii, but they also have the means to do so.



Travel Outlook Snapshot

Spending and Trip Intentions Are Up From April '22.

Leisure Travel and Spending/Next 12 Months



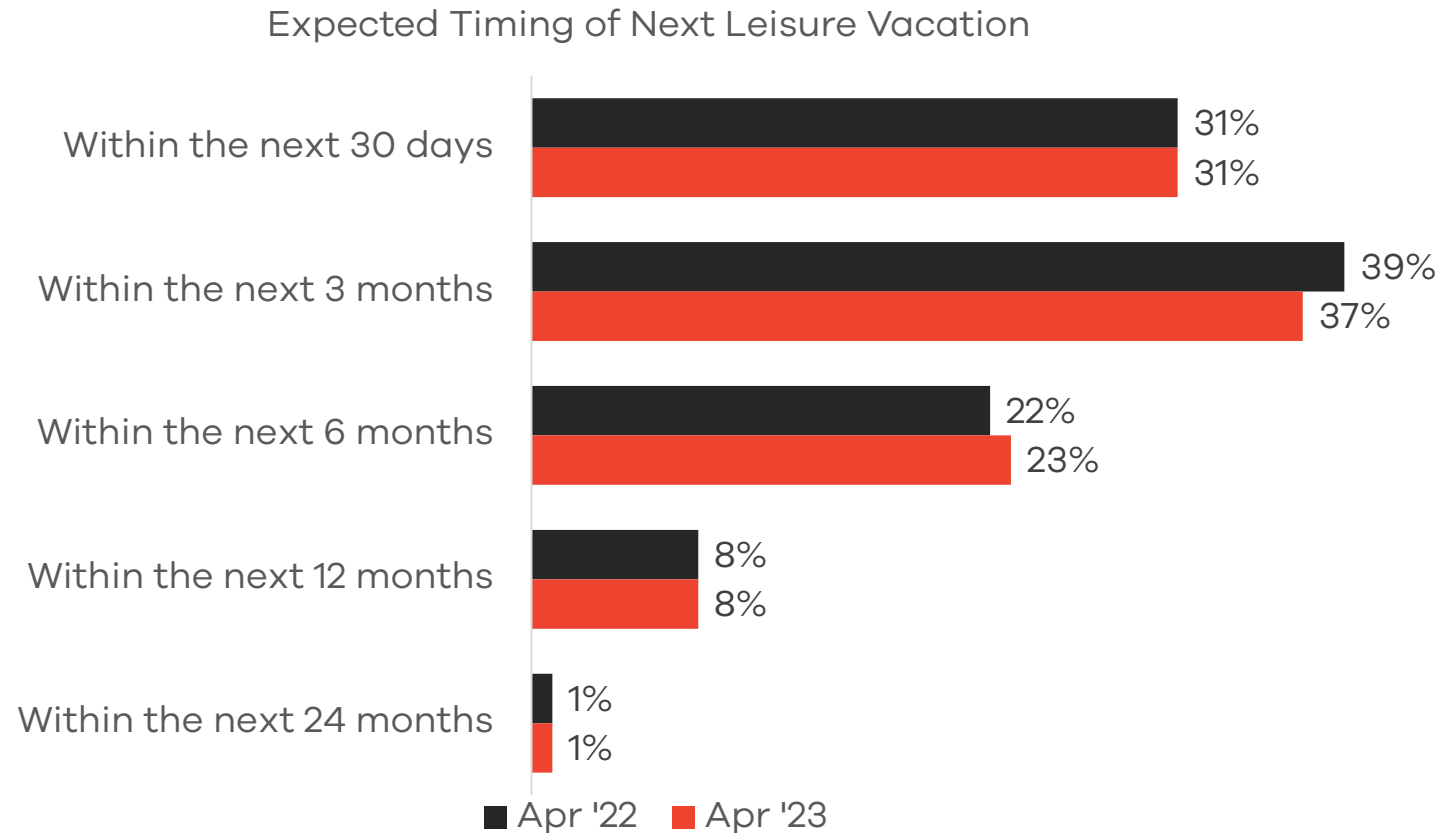
Spending intentions continue to rise, with spending up by nearly \$1,500 compared to this time last year. Travelers may be influenced by a combination of rising inflation and longer trips.

Traveler Intentions: Over Time

Base: Likely to Visit Hawaii & Planning to Take a Trip in the Next 12 Months (n=701)

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

Travel Intentions Are Similar To April '22



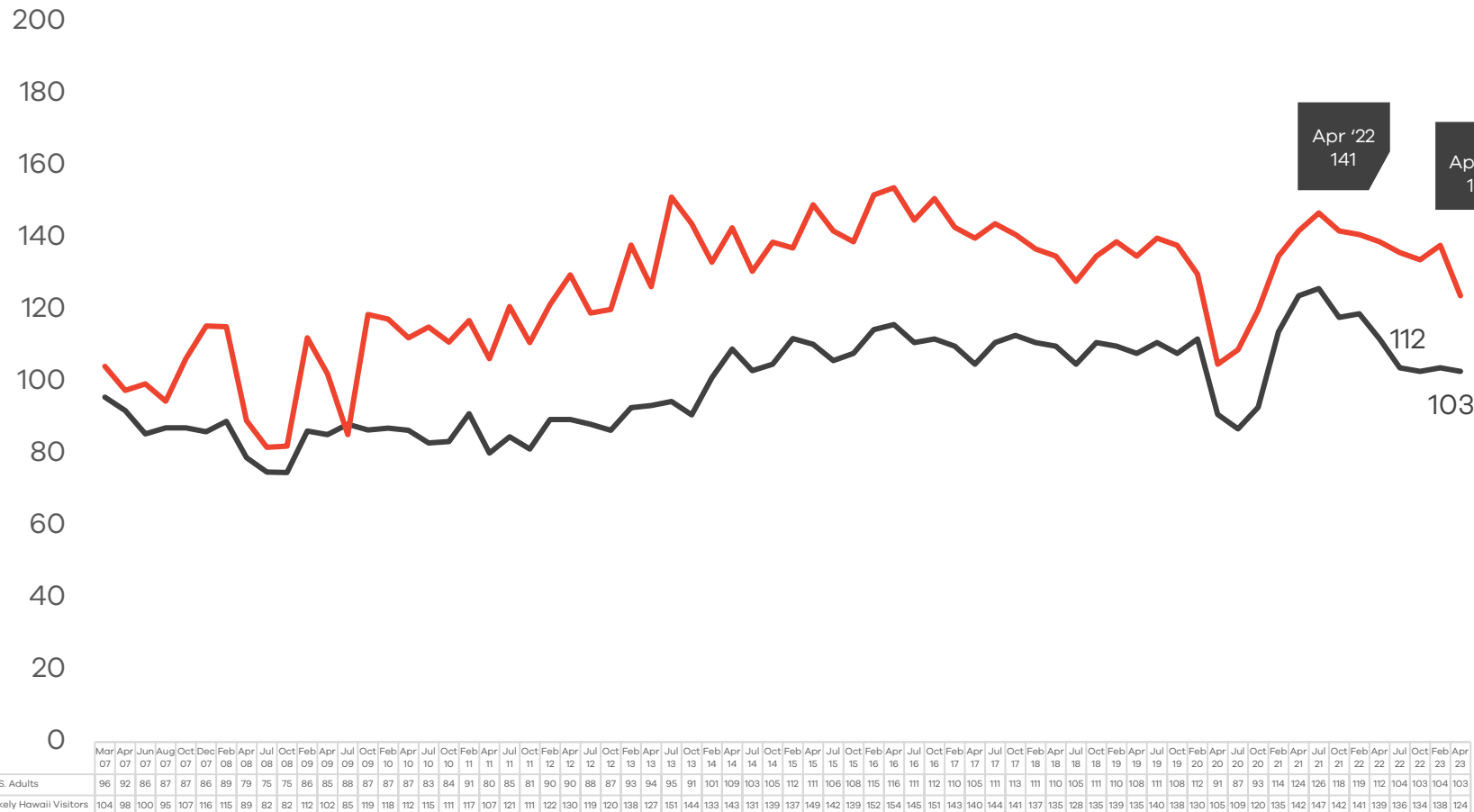
Traveler Intentions: Over Time

Data in bold indicates a significant difference from April 2022.

Base: Likely to Visit Hawaii (n=708)

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

Overall Traveler Sentiment Score: Down Significantly From Last Year



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

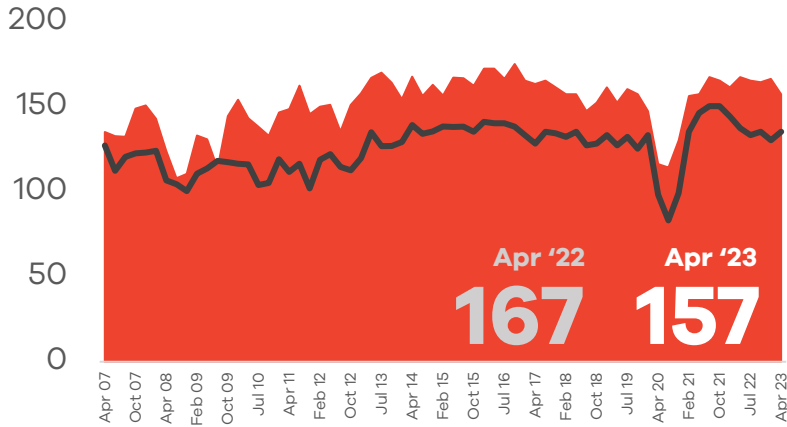
Traveler Sentiment Index™

Base: U.S. Adults (n=4,501) & Likely to Visit Hawaii w/o Air Travel (n=1,252)

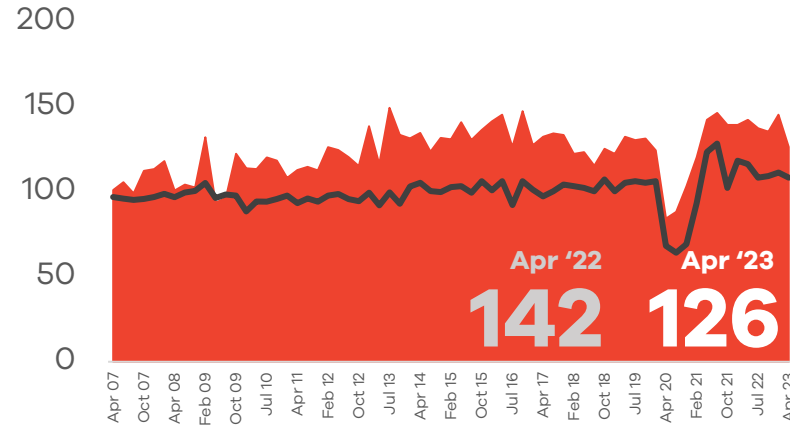
Source: MMGY Global's travelhorizons™/2023 Portrait of American Travelers® "Summer Edition"

Affordability of Travel Displayed The Largest Decrease From 2022

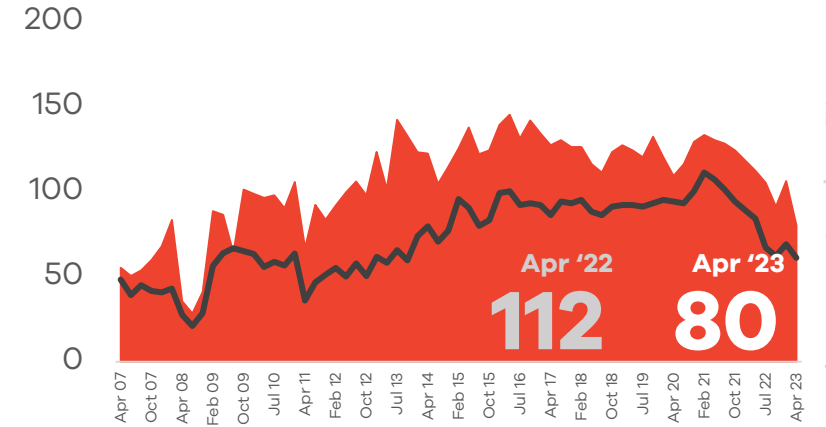
Interest in Travel



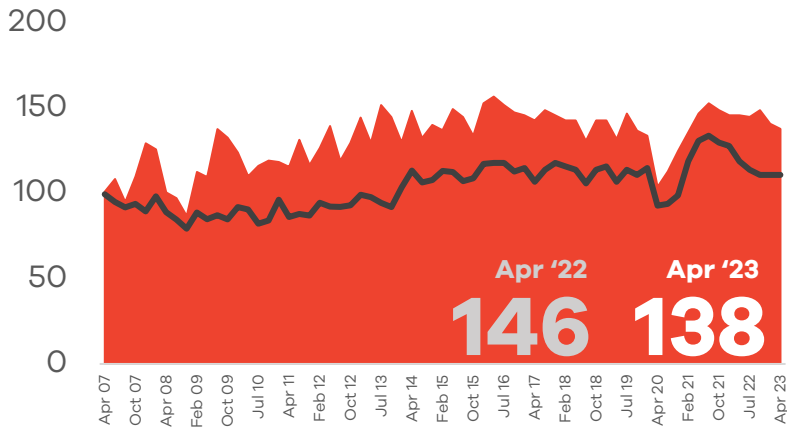
Perceived Safety of Travel



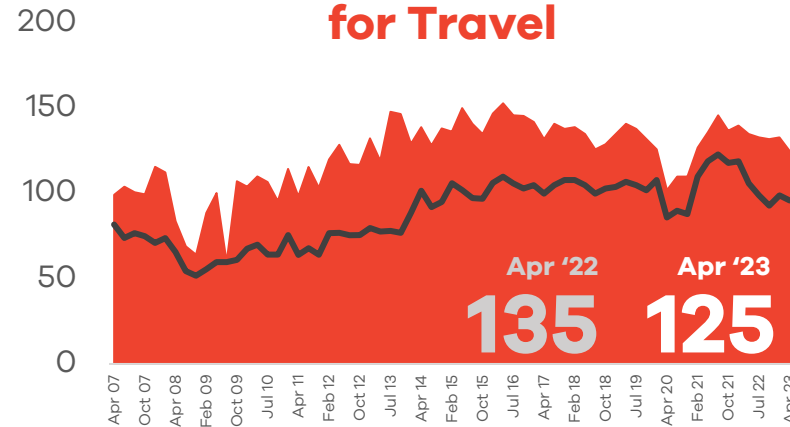
Affordability of Travel



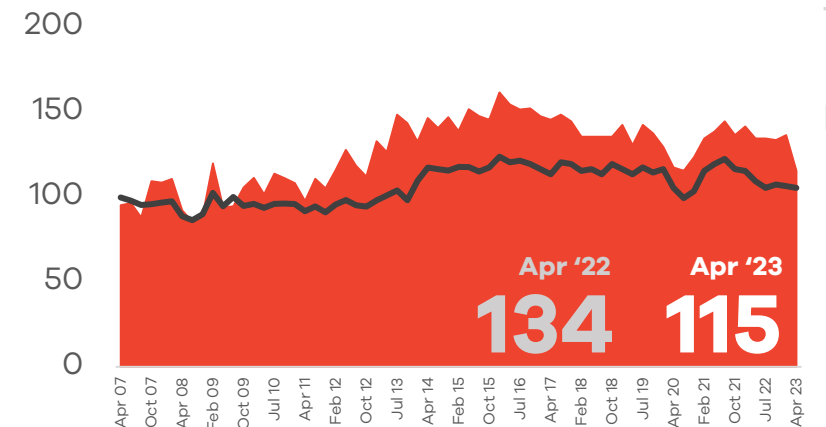
Time Available for Travel



Personal Finances Available for Travel



Quality of Service of Travel



Traveler Sentiment Index™

Base: U.S. Adults (n=4,501) (Black line) & Likely to Visit Hawaii w/o Air Travel (n=1,252) (Red fill)

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



TRAVEL OUTLOOK SNAPSHOT SUMMARY

KEY TAKEAWAY:

- Spending and travel intentions of Likely Hawaii Visitors are up significantly from last year. They plan to take an average of 4.8 trips this year and spend an average of \$6,294 during that time.
- The overall Traveler Sentiment Score of these travelers stands at 124, down 17 points from this time last year. This decrease was seen across all categories, but noticeably affordability decreased by 32 points compared to last year, followed by a decrease of 19 points for quality of service and a decrease of 18 points for perceived safety of travel.

WHAT IT MEANS:

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



Where People Want to Visit

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

Top 20 States of Interest	Apr '22	Apr '23
Florida	73%	67%
California	74%	65%
Alaska	64%	63%
Colorado	60%	61%
New York	63%	59%
Nevada	64%	57%
Arizona	62%	54%
Texas	57%	48%
Washington	55%	48%
North Carolina	46%	43%
Georgia	47%	43%
Tennessee	46%	42%
South Carolina	47%	41%
Oregon	43%	40%
Louisiana	43%	38%
Montana	41%	38%
Maine	44%	36%
New Mexico	44%	36%
Massachusetts	43%	35%
Utah	46%	35%

Destinations of Interest

Base: Likely to Visit Hawaii (n=708)

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

Data in bold indicates a significant difference from April 2022.

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

Top 20 Destinations of Interest	Apr '22	Apr '23
Island of Hawai'i	77%	83%
Honolulu, HI	79%	82%
Maui, HI	73%	80%
Kaua'i, HI	79%	78%
Lanai, HI	NA	69%
Las Vegas, NV	70%	66%
Florida Keys/Key West, FL	68%	64%
New York City, NY	62%	61%
San Diego, CA	63%	59%
Orlando, FL	59%	58%
San Francisco, CA	62%	57%
Miami, FL	57%	55%
Los Angeles, CA	61%	52%
New Orleans, LA	60%	51%
Tampa, FL/St. Peterburg/Clearwater, FL	58%	51%
Fort Lauderdale, FL	55%	51%
Napa Valley, CA	60%	50%
Palm Springs, CA	58%	50%
Niagara Falls, NY	50%	50%
Palm Beach, FL	55%	50%

Destinations of Interest

Base: Likely to Visit Hawaii (n=708)

Data in bold indicates a significant difference from April 2022.

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

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

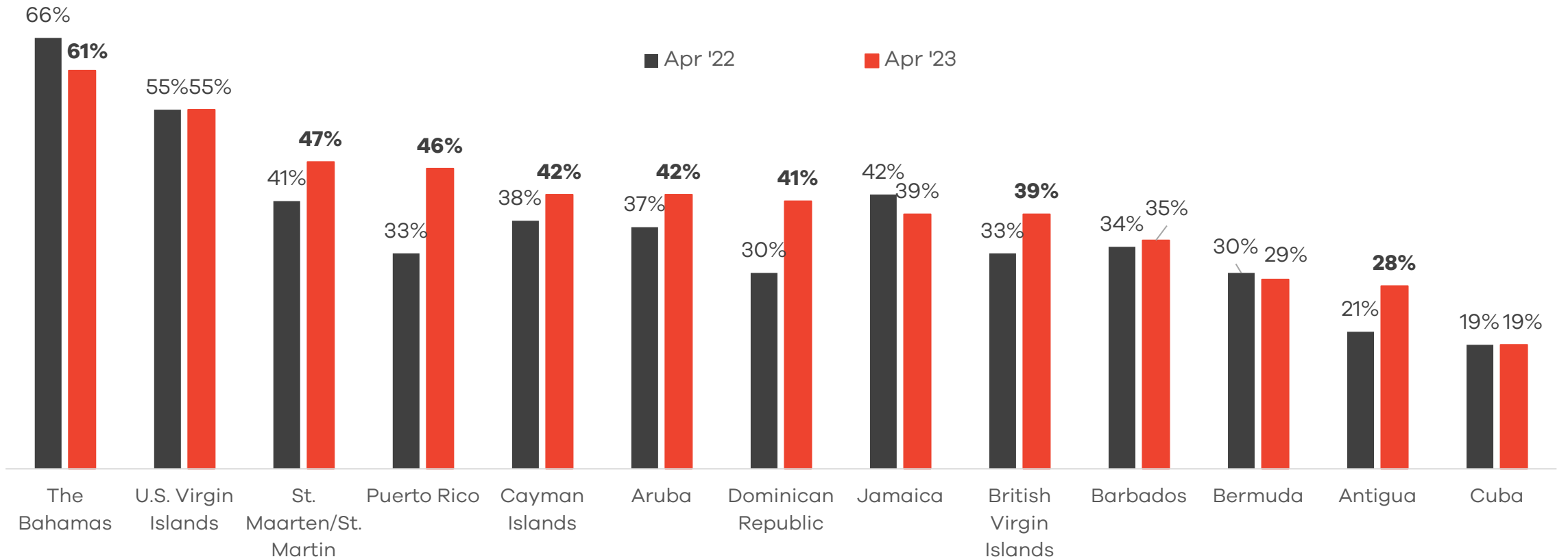
International Destinations of Interest	Apr '22	Apr '23
Europe	51%	53%
The Caribbean	42%	47%
Canada	38%	40%
Mexico	33%	34%
Asia	19%	25%
South America	18%	21%
Central America	15%	19%
Oceania	24%	18%
Africa	7%	11%
Middle East	7%	9%

Data in bold indicates a significant difference from April 2022.

Destinations of Interest

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

Caribbean Destinations of Interest



Destinations of Interest

Data in bold indicates a significant difference from April 2022.

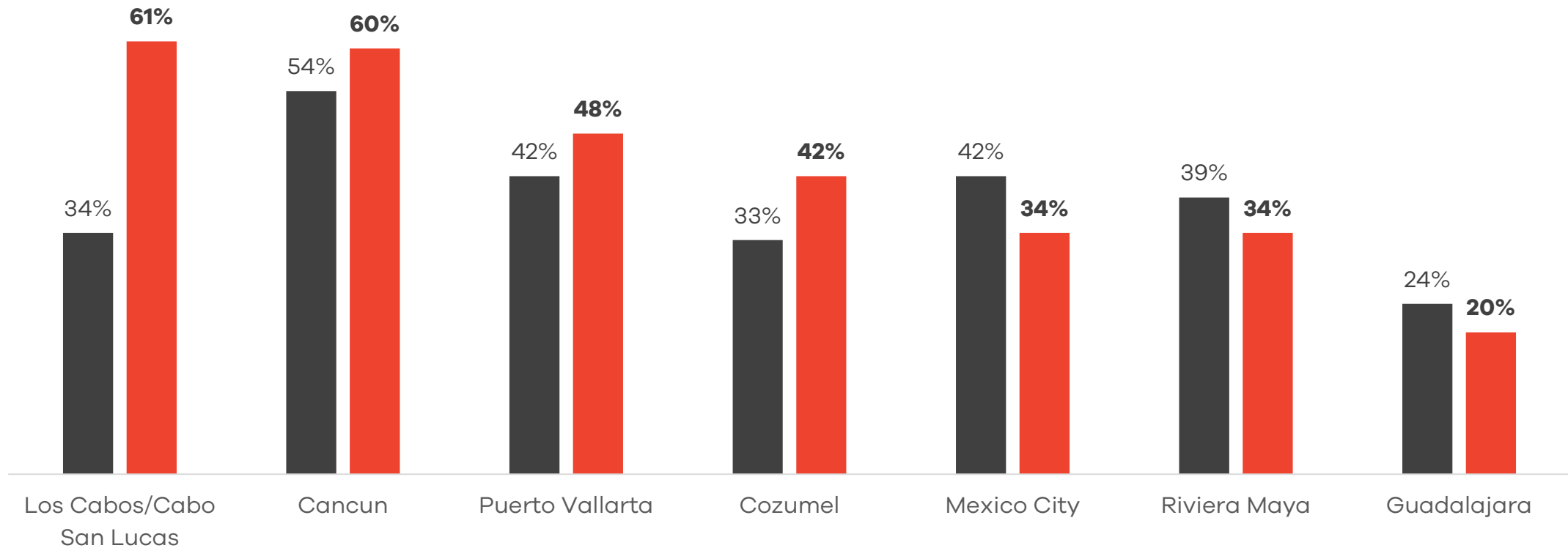
Base: Likely to Visit Hawaii & Interested in Visiting The Caribbean (n=270)

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

Interest in Visiting Los Cabos Nearly Doubled For Those Likely to Visit Hawaii Compared To Last Year

Mexican Destinations of Interest

■ Apr '22 ■ Apr '23



Destinations of Interest

Data in bold indicates a significant difference from April 2022.

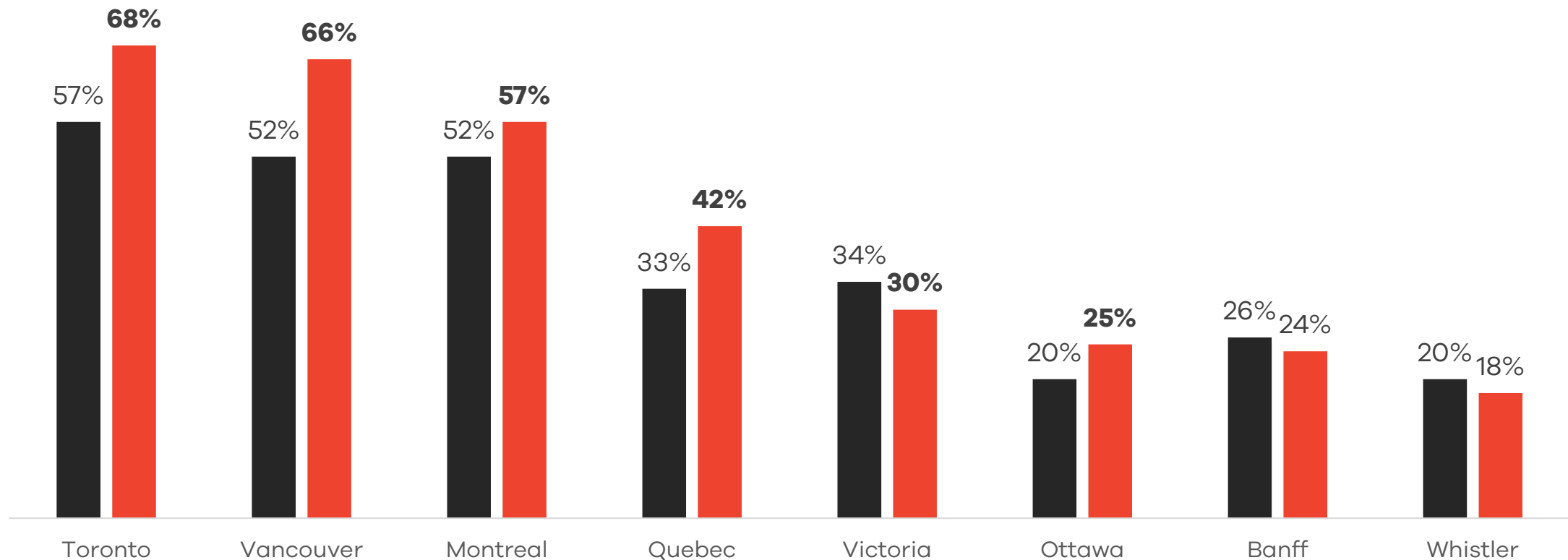
Base: Likely to Visit Hawaii & Interested in Visiting Mexico (n=201)

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

Interest In Visiting Toronto, Vancouver, Montreal and Quebec Rose Significantly From Last Year

Canadian Destinations of Interest

■ Apr '22 ■ Apr '23



Destinations of Interest

Data in bold indicates a significant difference from April 2022.

Base: Likely to Visit Hawaii & Interested in Visiting Canada (n=229)

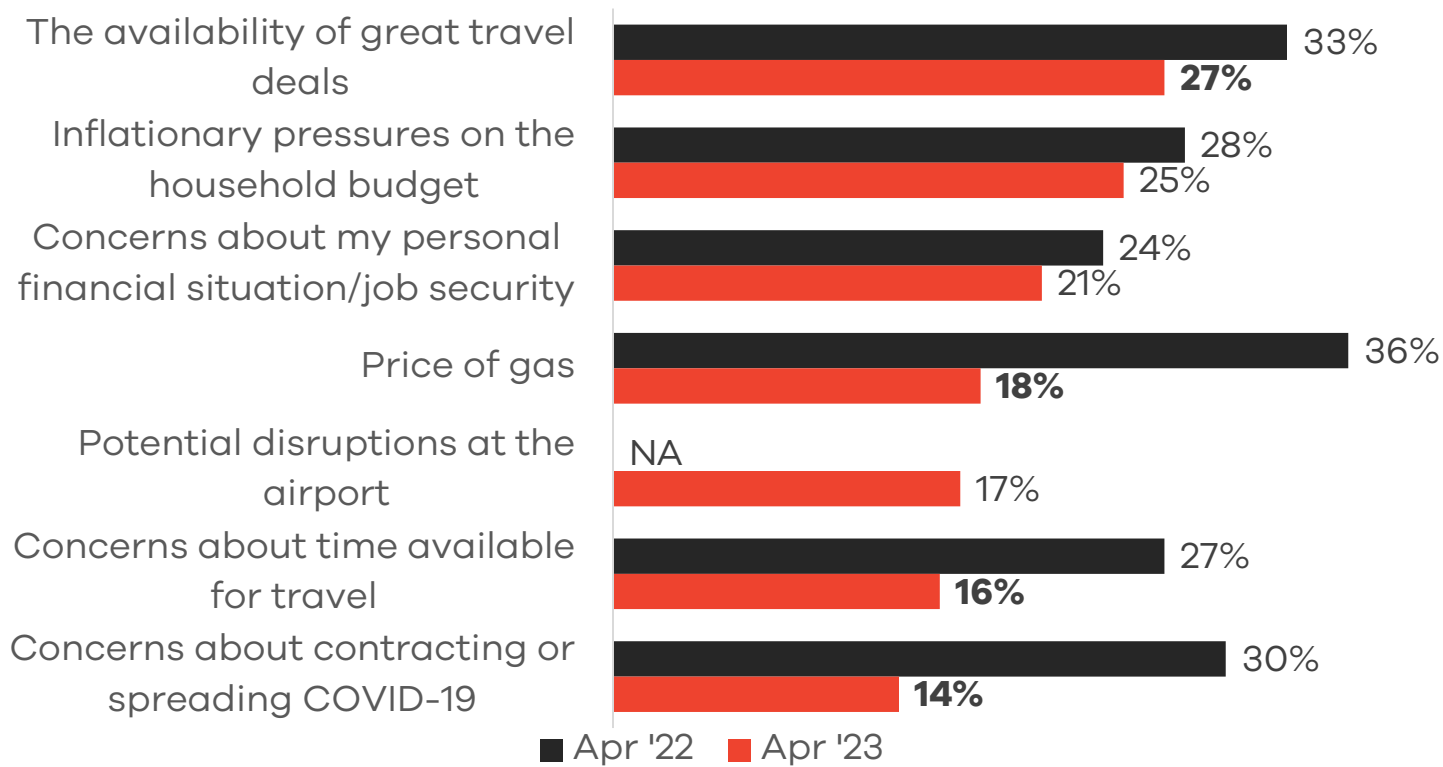
Source: MMGY Global's 2023 Portrait of American Travelers® "Summer Edition"



Barriers to Travel

Significantly Fewer Likely Hawaii Visitors Are Concerned About the Price of Gas

% Who Are Extremely Impacted By...



/ Likely Hawaii visitors are less impacted by the majority of factors compared to last year, with significant decreases in concern for the price of gas, concern about time available to travel and concerns about contracting or spreading COVID-19.

Barriers To Travel

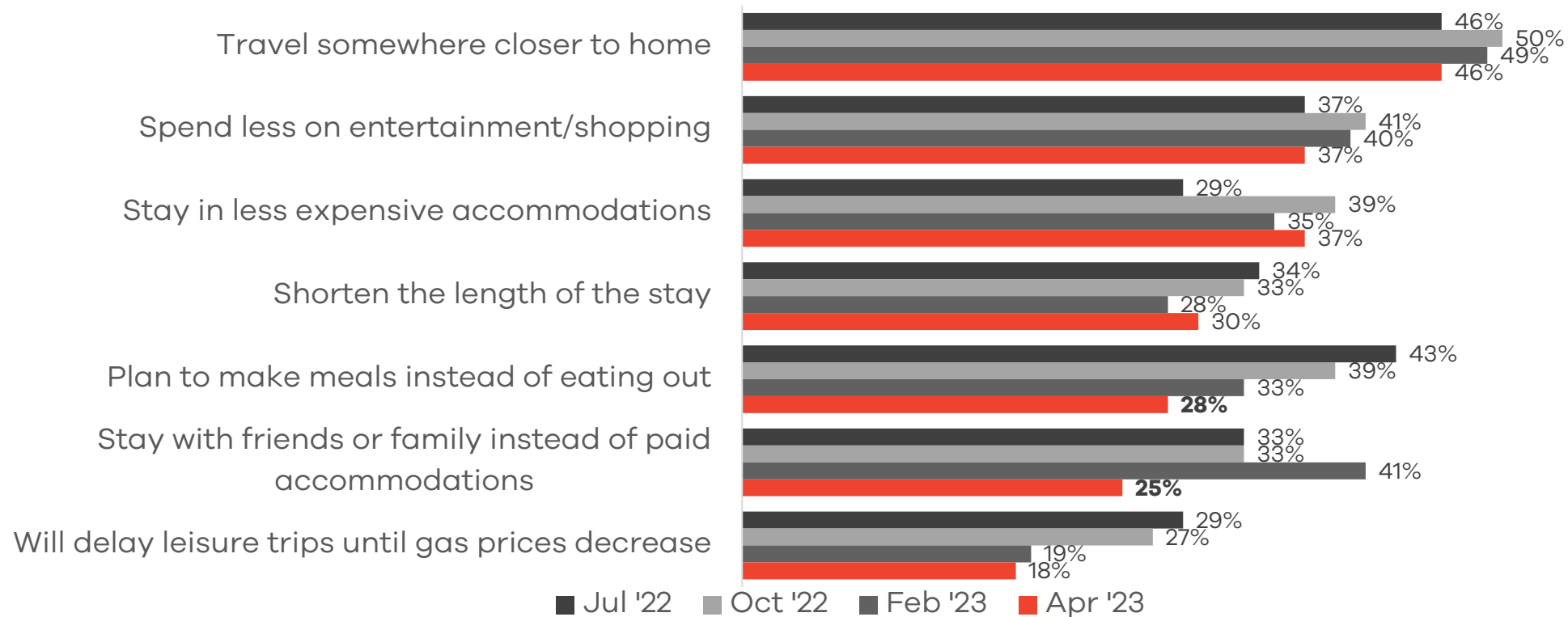
Data in bold indicates a significant difference from April 2022.

Base: Likely to Visit Hawaii (n=708)

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

Likely Hawaii Visitors Impacted By Gas Prices Say They Will Travel Somewhere Closer To Home, Followed By Spending Less On Entertainment/Shopping and Staying in Less Expensive Accommodations


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=404)

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



BARRIERS TO TRAVEL SUMMARY

KEY TAKEAWAY:

- With higher rates of vaccinations, lower case numbers, and fewer extreme illness cases, travel concerns around COVID-19 continue to decrease. Although this is still an extreme concern for 14% of Likely Hawaii Visitors, this percentage is down from nearly half this time last year, and we expect it to continue to decrease.
- Many aspects of travel decreased in concern compared to last year, particularly price of gas and time available to travel. However, concerns surrounding cost lead the way, with one-quarter of Likely Hawaii Visitors concerned about getting great travel deals and for inflationary pressures on their household budget.

WHAT IT MEANS:

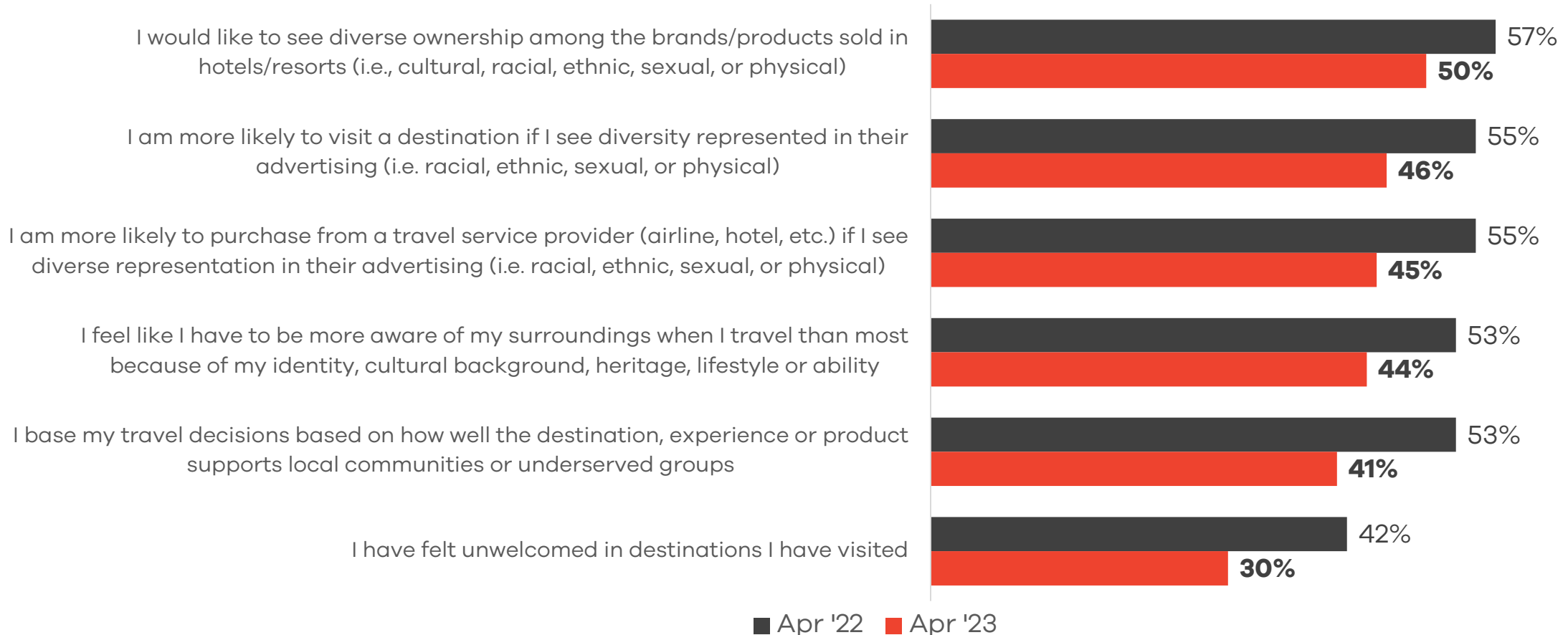
While concerns around COVID-19 have not gone away entirely, it has become less of a barrier to travel than it was in recent years. Meanwhile, cost and affordability appear to be a more primary concern for travelers.

Summer Module

Diversity in Travel

Half of Likely Hawaii Visitors Would Like To See Diverse Ownership Among Brands/Products Sold in Hotels/Resorts

Diversity Statements: % Agree



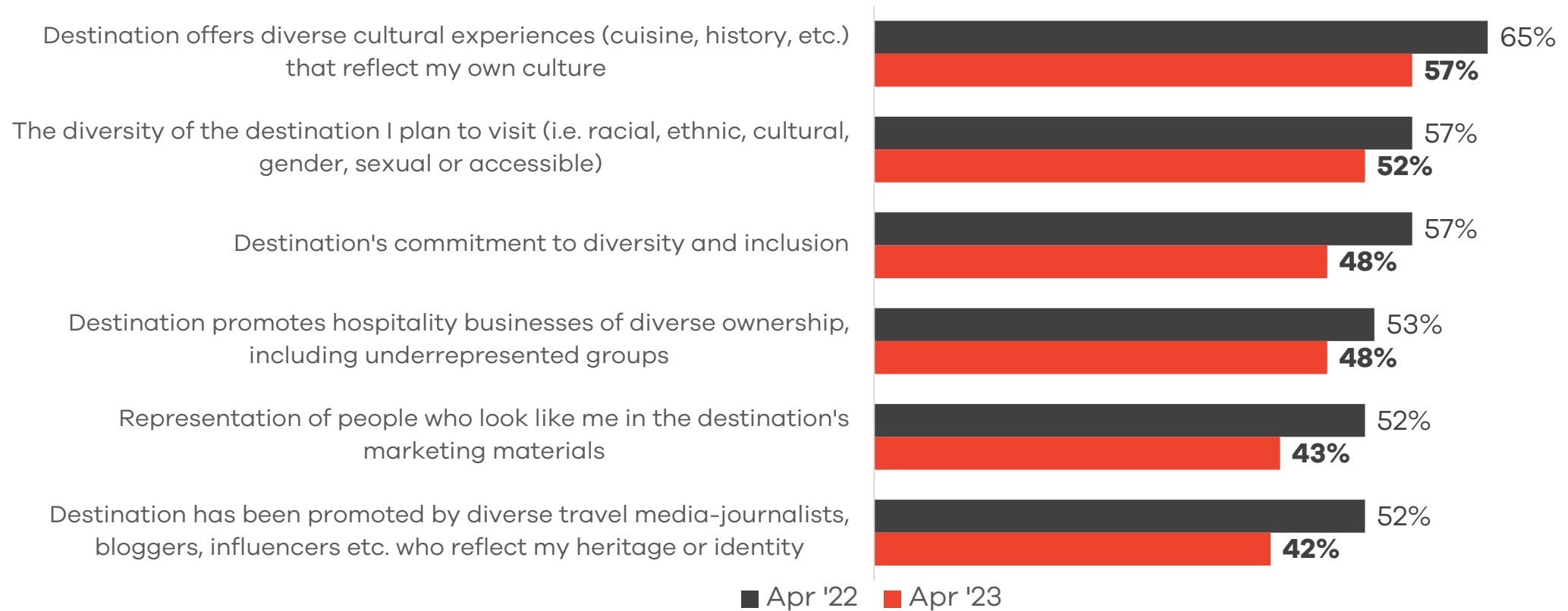
Data in bold indicates a significant difference from April 2022.

Base: Likely to Visit Hawaii (n=708)

Source: MMGY Global's 2023 *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 2022.

Base: Likely to Visit Hawaii (n=708)

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

48% 2022 43% 2023

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

66% 2022 60% 2023

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

While 4 in 10 of likely Hawaii visitors believe there are inequities in the travel industry, 6 in 10 of these respondents believe the industry is making strides to address the inequities.



DIVERSITY IN TRAVEL SUMMARY

KEY TAKEAWAY:

- Nearly half of Likely Hawaii Visitors agree that they are more likely to visit a destination if they see diverse representation in its advertising. Six in 10 are also influenced by a destination that offers diverse cultural experiences, and nearly half by its commitment to diversity and inclusion.
- Although 4 in 10 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.

*Summer
Module*

Family Travel

50%
2022

38%
2023

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

Compared to April '22, significantly fewer likely Hawaii visitors plan to travel with children during the next 12 months

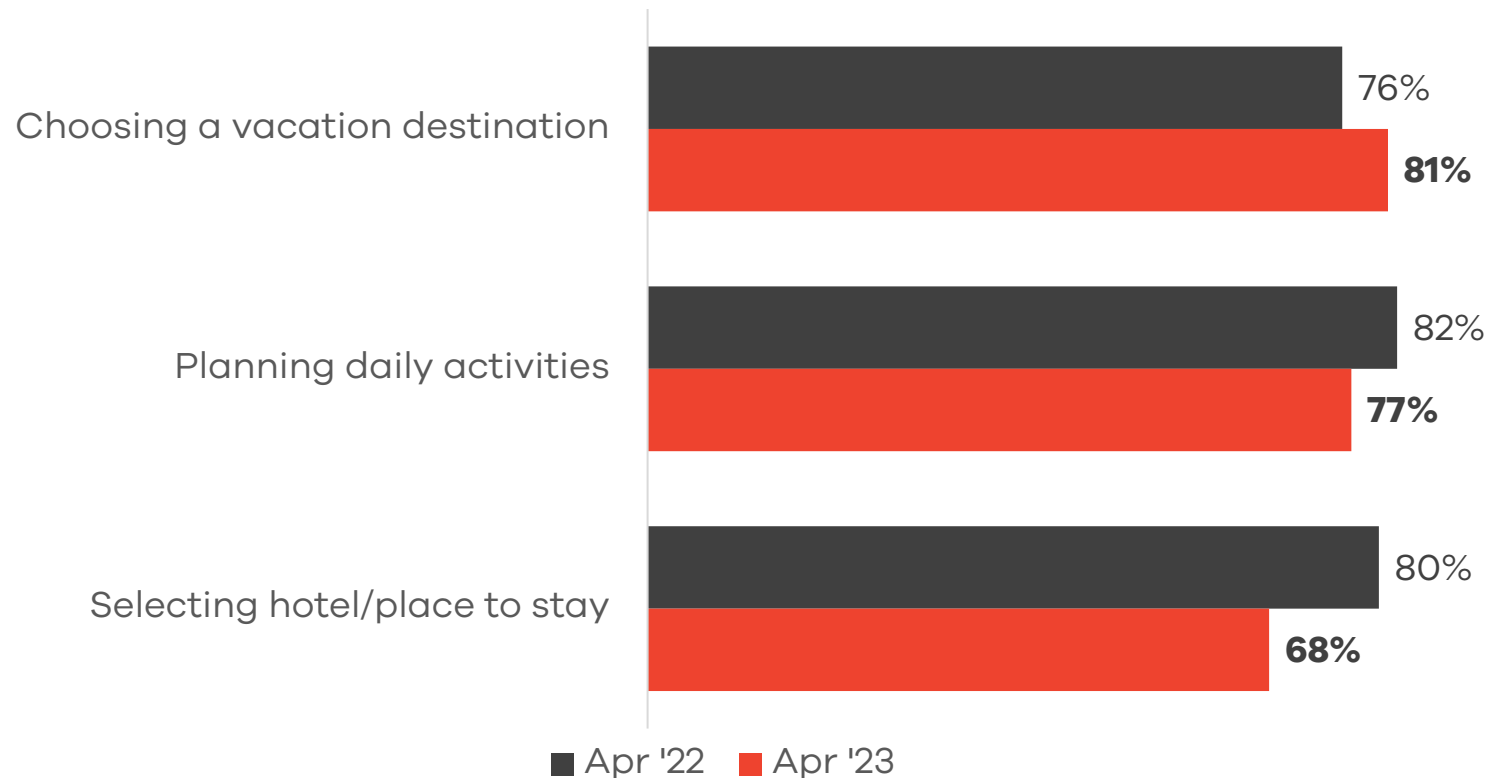
Base: Likely to Visit Hawaii (n=708)

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



Children of Likely Hawaii Visitors Continue To Influence Their Travel Decisions, Though Have Less Of An Impact On Selecting A Hotel/Place To Stay Than Previous Years

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

Base: Likely to Visit Hawaii (n=708)

Source: MMGY Global's 2023 *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



KEY TAKEAWAY:

- Four in 10 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 2022. Their children play a role in their vacation planning, with 8 in 10 indicating their children influence their choice of vacation destination and planning daily activities, and 7 in 10 in selecting accommodations.
- More than one-third 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.

FAMILY TRAVEL SUMMARY

*Summer
Module*

Travel Advisors

44%
2022

31%
2023

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

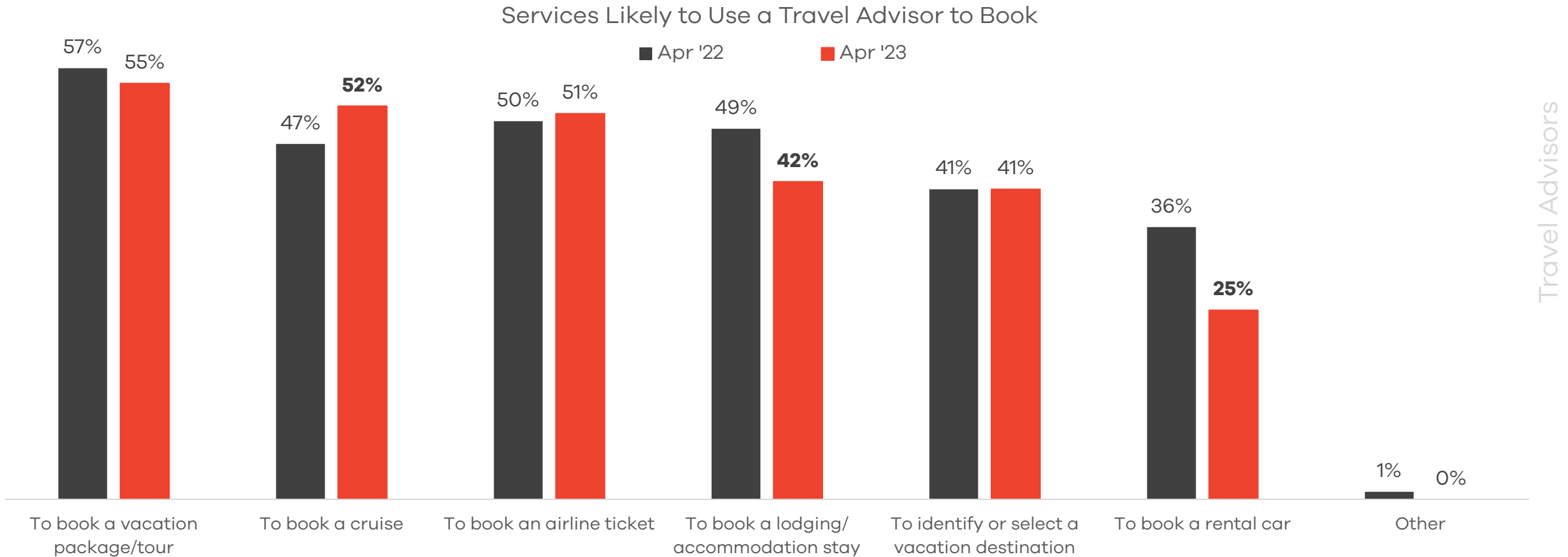
51%
2022

39%
2023

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.

Significantly More Likely Hawaii Visitors Are Using Travel Advisors to Book Cruises Compared To Apr '22



Data in bold indicates a significant difference from April 2022.

Base: Plan to use a Travel Advisor & Likely to Visit Hawaii (n=264)

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

Likely Hawaii Visitors Are Using Travel Advisors To Get The Best Price, To Take The Hassle Out Of Researching And Booking Travel And To Provide Help If Things Go Wrong

Reasons to Use a Travel Advisor	Apr '22	Apr '23
To get the best prices for a vacation	48%	52%
They provide help if things go wrong	46%	50%
To take the time and hassle out of researching and booking travel	39%	50%
To have peace of mind that what I'm booking is the experience I expect it will be	46%	46%
To gain access to experiences I can't get on my own	37%	42%
To get recommendations on the hottest/trending places to visit	51%	39%
Other	1%	1%

Data in bold indicates a significant difference from April 2022.

/ 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 the best prices, provide help if things go wrong, take the hassle out of researching and booking and to gain access to experiences they cannot get on their own.

Travel Advisors



TRAVEL ADVISORS SUMMARY

KEY TAKEAWAY:

- Four in 10 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 2022. They're using travel advisors to book vacation packages, airlines tickets, and cruises (significantly more than did so last year). They choose to use travel advisors because they can provide the best prices, help if things go wrong and offer peace of mind when booking.
- The pandemic still impacts the likelihood of nearly one-third of Likely Hawaii Visitors to book with travel advisors in the future, with 19 percent indicating they're more likely to book with a travel advisor, while only 11 percent said they're less likely to book with a travel advisor.

A man and a woman are shown in profile, facing each other and smiling. The man, on the left, has a backpack and is holding a stick of food. The woman, on the right, has a camera and is holding a black bowl. They are in a city at night, with blurred lights in the background. A diagonal graphic element separates the top right from the rest of the image.

*Summer
Module*

Traveler Perspectives



TRAVELER PERSPECTIVES SUMMARY

KEY TAKEAWAY:

- Eight in 10 Likely Hawaii Visitors feel optimistic about their own future and the future of their children, while only half feel optimistic about the future of the U.S. and about the future of the world.
- More than 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 and taking a vacation is the event they most look forward to each year.

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.

*Summer
Module*

Cannabis Tourism



52%
2022

47%
2023

of likely Hawaii Visitors are interested in participating in at least one cannabis-related activity* while on vacation.

(*Activities are listed on the next page)

- / Compared to the average U.S. Leisure Traveler, significantly more Likely Hawaii Visitors are interested in participating in at least one cannabis-related activity while on vacation.

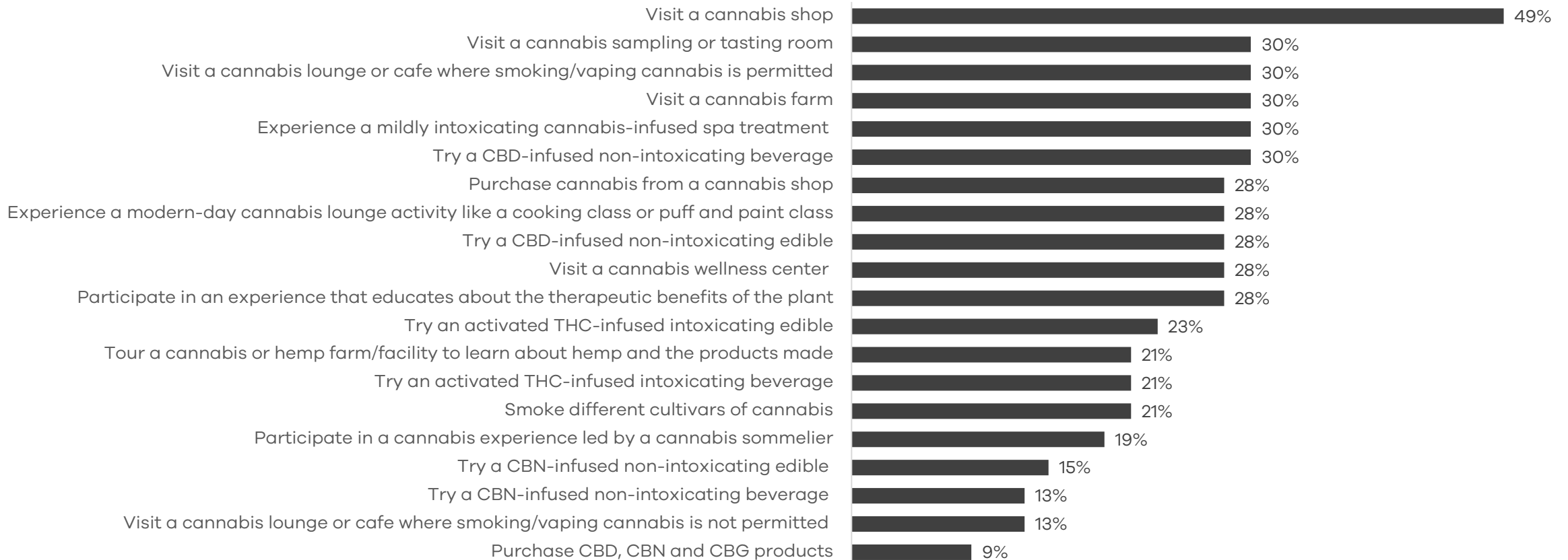
Base: Likely to Visit Hawaii (n=708)

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

Visiting a Cannabis Shop Is the Most Popular Cannabis Vacation Activity of Interest For Likely Hawaii Visitors

Interested in Cannabis Activities

(Among the 37% of travelers who are interested in at least one activity)



Base: Likely Hawaii Visitors who are interested in a cannabis activity (April 2023: n=621)

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

More Than One-Third of Likely Hawaii Visitors Interested in Cannabis Experiences Are Interested in Experiencing Mild to Medium Intoxicating Effects While on Vacation

Interested in Cannabis Experiences
 (Among the 37% of travelers who are interested in at least one activity)

Interest in Effects	Likely Hawaii Visitors
Interest in feeling mild intoxicating cannabis effects while on vacation	38%
Interest in feeling medium intoxicating cannabis effects while on vacation	35%
Interest in experiencing cannabis effects that complement and enhance food experiences like fine dining or sampling local signature dishes	35%
I am only interested in non-intoxicating cannabis and hemp activities and experiences while on vacation	33%
Interest in experiencing cannabis effects that complement and enhance art experiences like mural walks, theater and live music performances	29%
Interest in feeling strong intoxicating cannabis effects while on vacation	27%
Interest in experiencing cannabis effects that complement and enhance nature experiences like a hike in the redwoods or a day at the beach	27%
All of the above	3%

Four in 10 Likely Hawaii Visitors Interested in Cannabis Hotels Are Interested in Hotels That Have Knowledge Staff Capable Of Offering Cannabis Experience Recommendations

Interested in Cannabis-Friendly Hotels

(Among the 37% of travelers who are interested in at least one activity)

Interest in Effects	Active Leisure Travelers
Hotels that have knowledgeable staff who are capable of answering basic questions and offering cannabis experience recommendations in the destination	43%
Hotels that offer cannabis-infused spa treatments	40%
Hotels that have dedicated areas for smoking cannabis	36%
Hotels that permit non-smoking cannabis consumption (e.g., beverages, edibles, topicals)	30%
Hotels that offer cannabis delivery as a curated service amenity	30%
Hotels that have cannabis, hemp and CBD-related experiences on-site (e.g., 420 happy hour, CBD beverage happy hour)	23%
Hotels that offer non-intoxicating hemp-derived products in the lobby shop (CBD, CBN)	19%
Hotels that offer non-intoxicating hemp-derived products in-room (CBD, CBN)	17%
All of the above	13%

Base: Likely Hawaii Visitors who are interested in cannabis-friendly hotels (n=621)

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

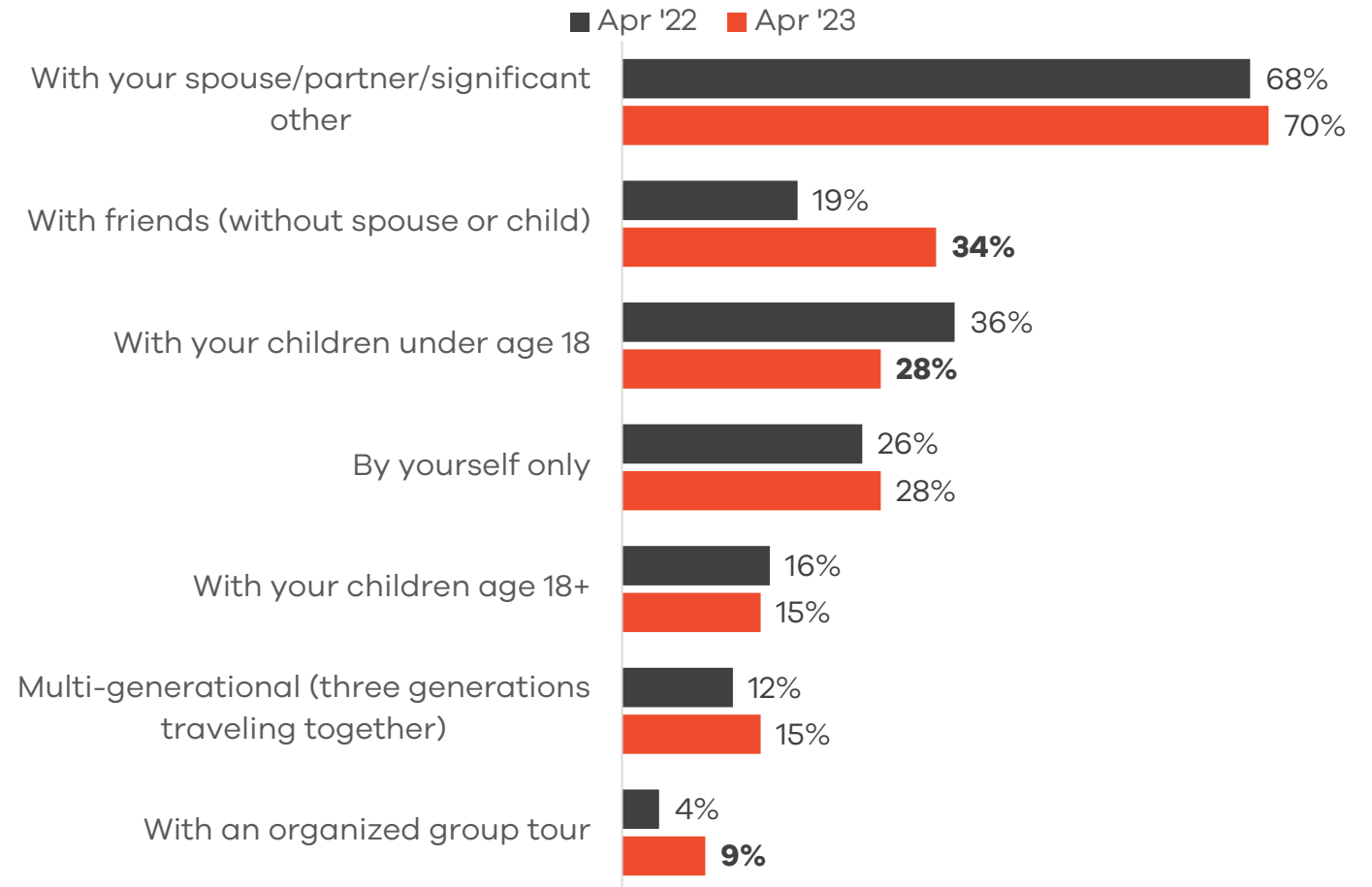


Vacation Motivators and Activities



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

Travel Party During the Next Six Months



Data in bold indicates a significant difference from April 2022.

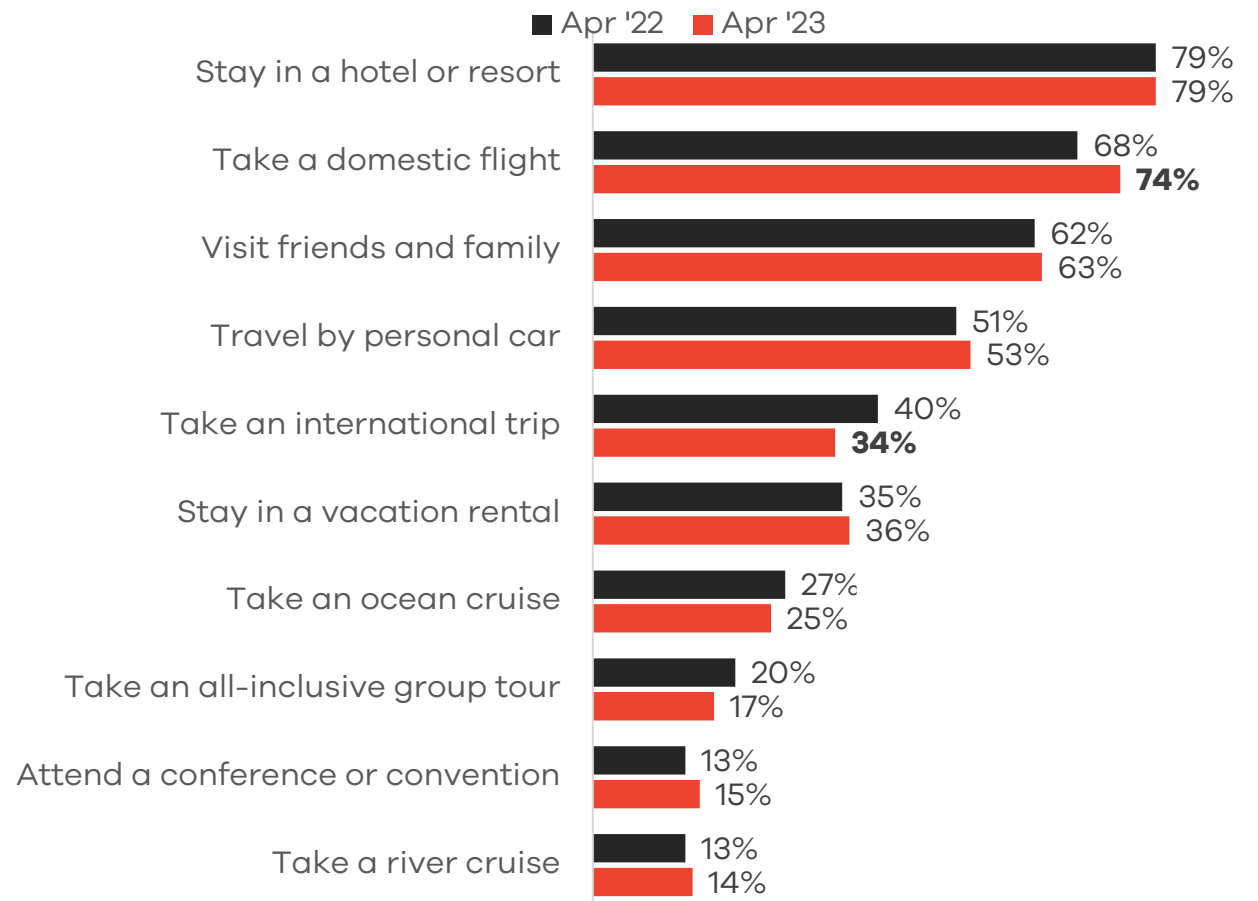
Base: Likely Hawaii Visitors who intend to travel during the next six months (n=569)

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



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

Travel Expectations in the Next 6 Months



Data in bold indicates a significant difference from April 2022.

Base: Likely Hawaii Visitors who intend to travel during the next six months (n=569)

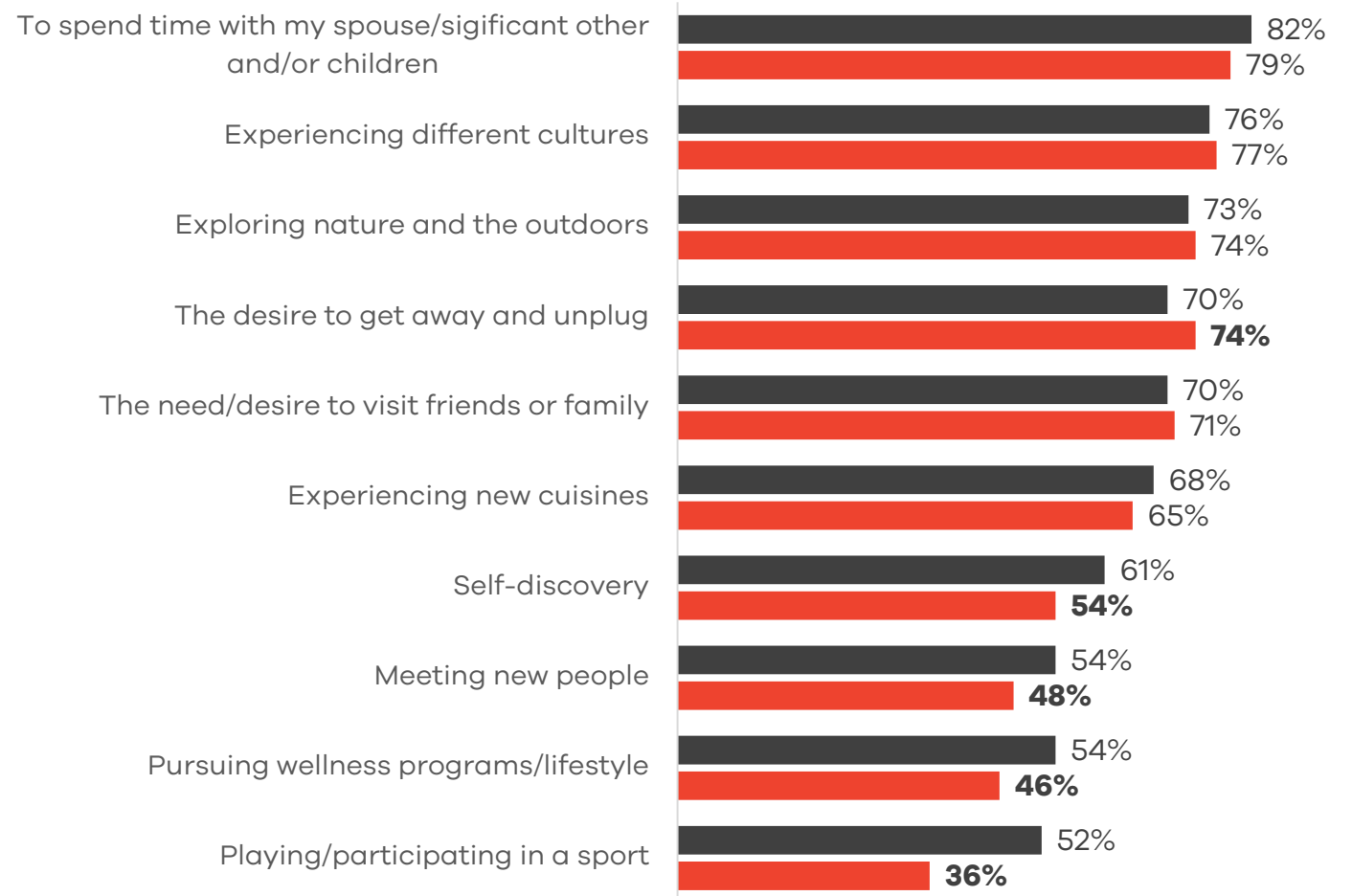
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Summer Edition"



Spending Time With Spouse/Significant Other And/OR Children And Experiencing Different Cultures Are The Top Motivators to Travel For Likely Hawaii Visitors

Vacation Motivators

■ Apr '22 ■ Apr '23



Data in bold indicates a significant difference from April 2022.

Base: Likely to Visit Hawaii (n=708)

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

What Destination Attributes Influence Choice of Destination?

Influential When Selecting a Destination	Apr '22	Apr '23
Beautiful scenery	64%	70%
Safety	54%	65%
Food and drink scene	57%	61%
Outdoor/nature activities	49%	52%
Historical significance of a destination	45%	48%
A sense of tradition (place family has traditionally visited)	29%	33%
Focus on family activities	35%	32%
The ethnic diversity and multicultural population of a destination	29%	30%
Music scene	24%	27%
Nightlife/bars	21%	25%
The destination's reputation for environmental responsibility	25%	20%
The destination's commitment to social justice and equality	18%	19%
LGBTQ+ travel offerings	10%	10%

Data in bold indicates a significant difference from April 2022.

- / Beautiful scenery is the top feature travelers look for when selecting a destination.
- / Beautiful scenery, safety, food and drink scene, a sense of tradition and nightlife/bars all increased significantly compared to April 2022.

Activities of Interest on Vacation

	Apr '22	Apr '23
Beach experiences	54%	66%
Visiting a state or national park	43%	56%
Shopping	42%	50%
Historical sites	47%	48%
Visiting a museum	38%	43%
Hiking/climbing/biking/other outdoor adventures	33%	39%
Visiting a theme or amusement park	35%	36%
Visiting notable architectural sites	31%	34%
Guided tours with access to local experiences that are otherwise inaccessible	32%	32%
Attending a sporting event	30%	32%
Attending a concert/music festival	24%	32%
Spa Services (massages, facials, etc.)	23%	32%
Adventure travel (safaris, mountain climbing, trekking vacations, etc.)	29%	29%
Water sports (waterskiing, boating/rafting)	26%	28%
Nightlife	23%	26%
Casino gambling	30%	25%
Exploring family's ancestry/past on a heritage vacation	23%	24%
Attending performing arts events	18%	20%
Film/art festivals	20%	19%
Playing golf	19%	16%
Snow skiing/snowboarding	16%	13%
Playing tennis	14%	13%
Scuba diving	13%	13%
Surfing	13%	9%

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

Data in bold indicates a significant difference from April 2022.

Base: Likely to Visit Hawaii (n=708)

Source: MMGY Global's 2023 *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. Two-thirds of these travelers are planning to travel with their significant other while 3 in 10 plan to travel with friends. Compared to April '22, significantly more of these travelers plan to take a domestic flight.
- Likely Hawaii Visitors are taking vacations to spend time with their spouse/children, to experience different cultures, to explore nature and the outdoors and to unplug. They're influenced by a destination's beautiful scenery, perceived safety and food and drink scene. On vacation, they are most interested in beach experiences, shopping, and visiting state and national parks.



THANK YOU

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