

Spring 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 4,529 U.S. adults in February 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 824 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.

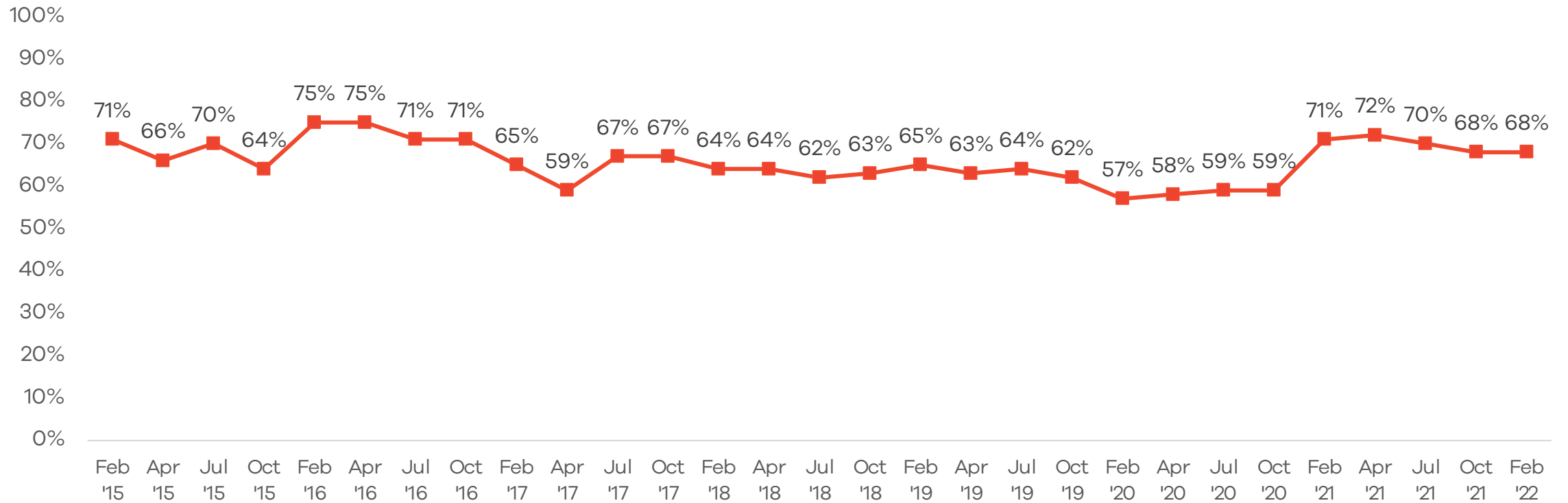
The four generations of adults surveyed are defined below. Due to the small the number of Silent/GI respondents, we did not include their individual results in this report.

Generation	Age	% of Respondents
Gen Zs	18–24	11%
Millennials	25–40	29%
Gen Xers	41–56	24%
Boomers	57–75	30%
Silent/GI	75+	6%

Hawaii Tourism Proprietary Questions

Interest in Visiting Hawaii is Down Slightly from February '21.

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

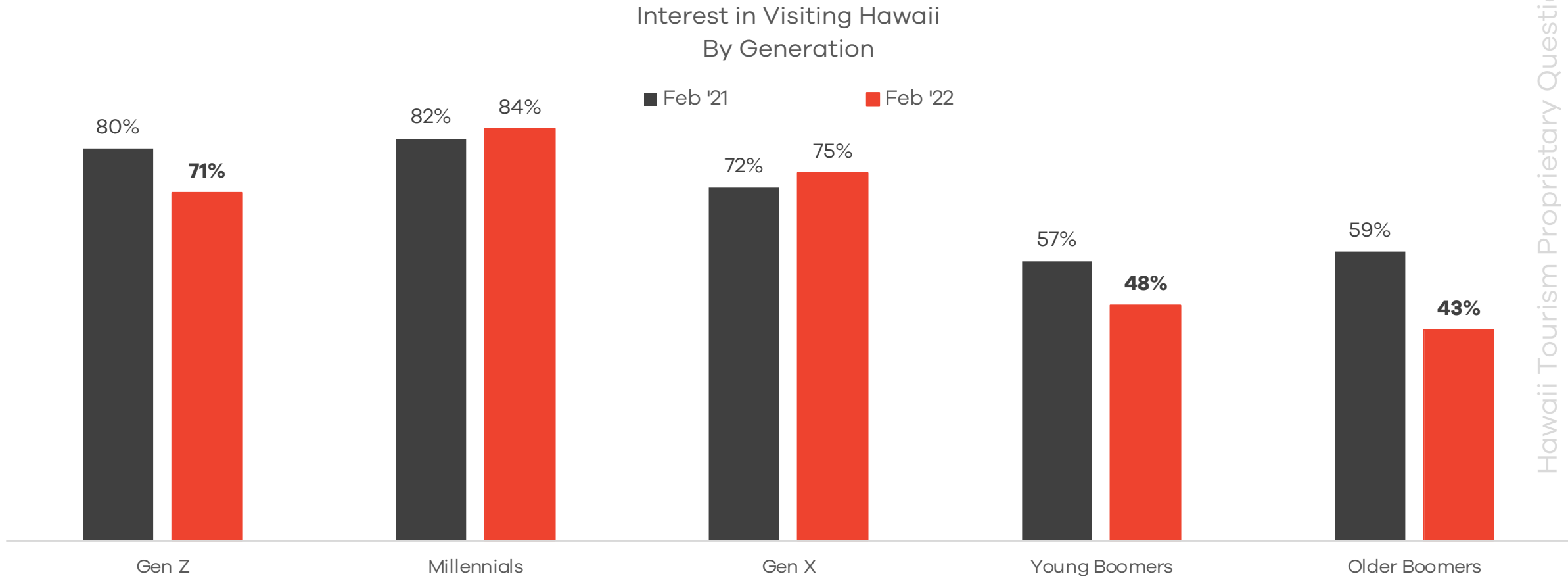


Hawaii Tourism Proprietary Questions

Base: Air Travelers (n=1,550)

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

Interest in Visiting Hawaii Remains Consistent Among Millennials and Gen Xers

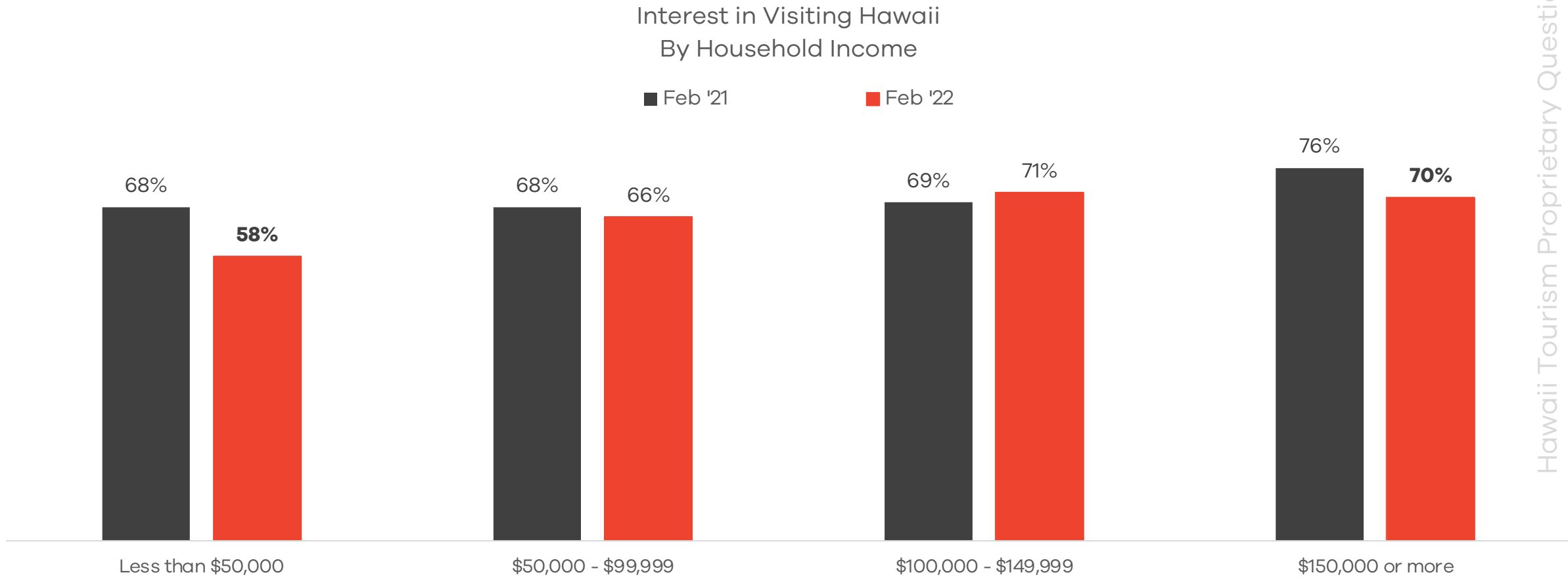


Data in bold indicates a significant difference from February 2021.

Base: Air Travelers (n=1,550)

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

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

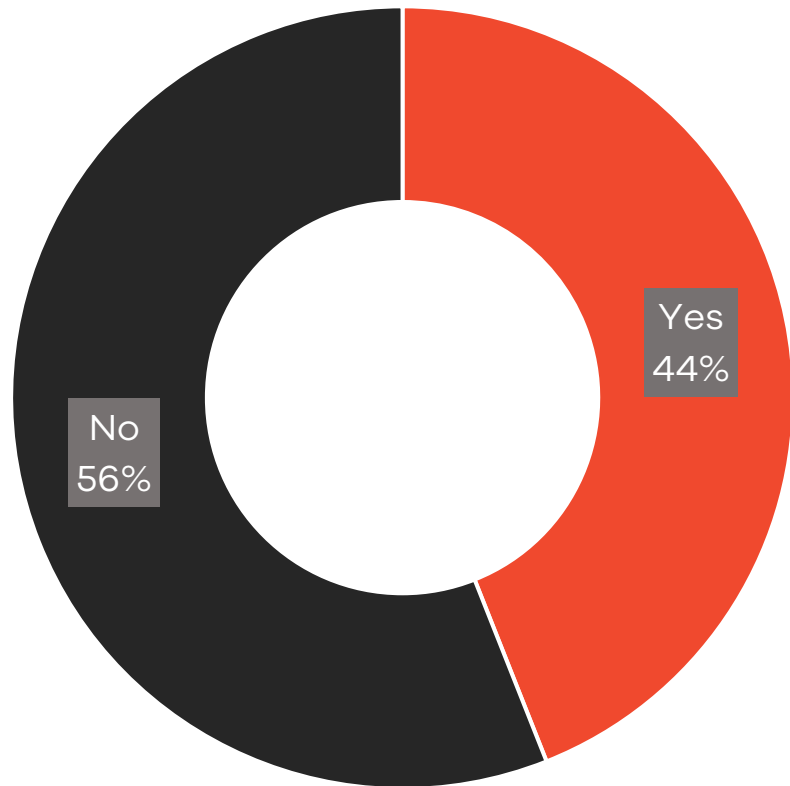
Data in bold indicates a significant difference from February 2021.

Base: Air Travelers (n=1,550)

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

COVID-19 Concerns and the Cost to Visit Hawaii Continue to Be Deterrents To Visiting

Considered Visiting Hawaii But Changed Mind

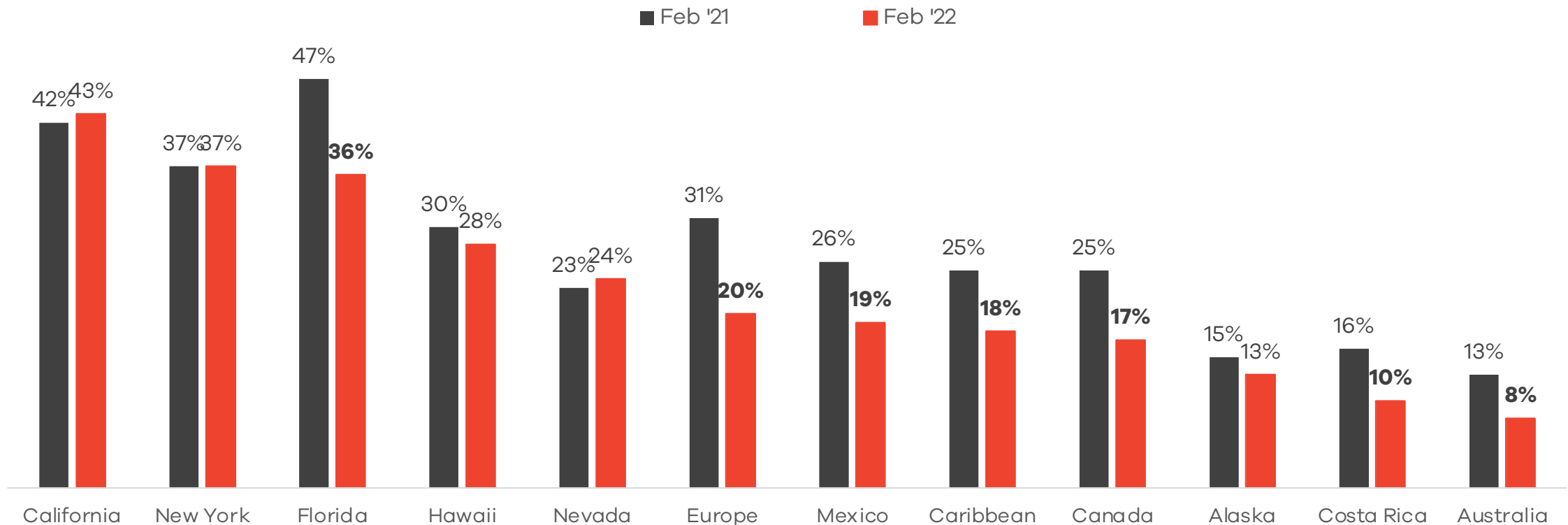


Reasons For Not Visiting Hawaii – Among Those Who Changed Their Mind	Feb '21	Feb '22
Hawaii's COVID-19 travel restrictions	NA	26%
Price of airfare	25%	25%
Price of a vacation package	26%	23%
Concerns about COVID-19 variants	NA	22%
Price of the hotel	21%	21%
Better value at another destination	17%	20%
The flight to Hawaii is too long	22%	19%
Already been and want to try another destination	15%	16%
Hawaii is not unique enough	8%	14%
Hawaii is too crowded	11%	13%
Hurricanes and tropical storms hitting Hawaii	13%	12%
Not enough time to travel to Hawaii	17%	10%
Not sure which island(s) in Hawaii to visit	11%	10%
Accommodations were not available	9%	10%
Not enough activities in Hawaii	7%	9%
Local people are not friendly	9%	8%
Hawaii is not exotic enough	8%	7%

Data in bold indicates a significant difference from February 2021.

Past Visitation To Florida and International Destinations Decreased from February 2021.

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

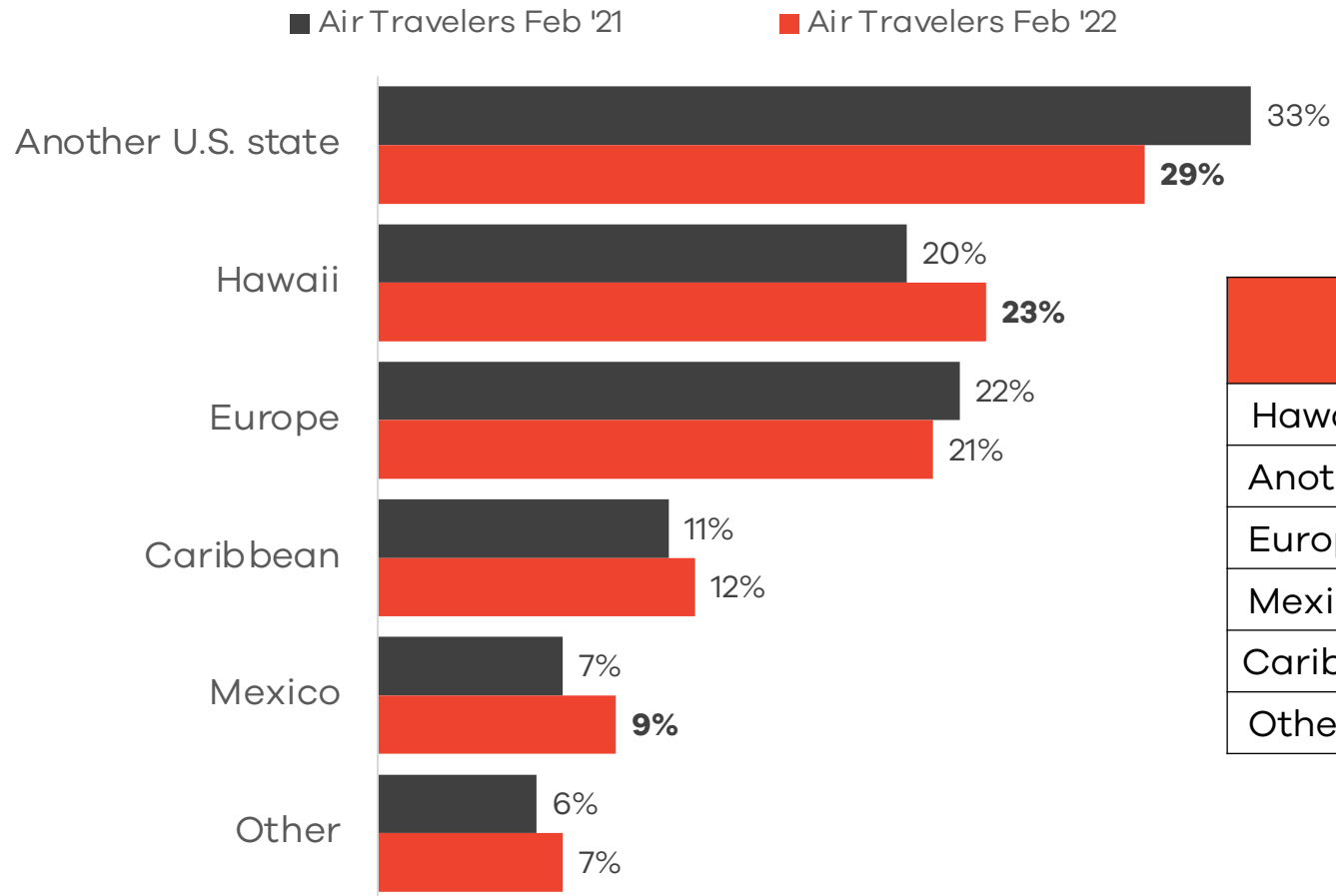


Data in bold indicates a significant difference from February 2021.

Base: Likely to Visit Hawaii (n=824)

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

Compared to Feb '21, Slightly More Air Travelers Are Interested in Visiting Hawaii 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%	23%	34%
Another U.S. state	35%	29%	22%
Europe	17%	21%	17%
Mexico	7%	9%	11%
Caribbean	11%	12%	10%
Other	10%	7%	5%

Data in bold indicates a significant difference from February 2021.

Base: U.S. Leisure Travelers (n=4,202), Air Travelers (n=1,550), Likely to Visit Hawaii (n=824)

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



HAWAII TOURISM PROPRIETARY SUMMARY

KEY TAKEAWAY:

- Interest in visiting Hawaii is down slightly from last year. This decrease is seen among Gen Z, Boomers, and those with household incomes less than \$50,000 and more than \$150,000.
- Among those who planned to visit Hawaii but changed their mind, the most cited reasons for doing so are COVID-19 travel restrictions and the costs associated to visit Hawaii.

WHAT IT MEANS:

Despite a small decrease from this time last year, interest in visiting Hawaii is still higher than we've seen in recent years (pre-2021). Although COVID-19 restrictions continue to ease, it will be important to keep an eye on rising travel prices as the cost to visit Hawaii is already a deterrent to visit and this could continue to grow.



The Hawaii Prospect

Self-Described Personas

	U.S. Leisure Travelers	Likely Hawaii Visitors
Beach lover	38%	39%
Foodie	33%	37%
Family traveler	32%	33%
Pet lover	31%	29%
Wine enthusiast	17%	28%
Theme park enthusiast	22%	27%
Luxury traveler	15%	26%
Outdoor adventurer	24%	25%
World traveler	17%	25%
Sports fan/enthusiast	20%	23%
All-inclusive enthusiast	17%	23%
Environmentally-conscious	20%	22%
Cruise lover	17%	22%
Travel bargain hunter	24%	21%
Moderate	19%	19%
Liberal	18%	19%
Concert/festival enthusiast	16%	16%
Conservative	20%	15%
Social justice enthusiast	7%	14%
Ski/snowboard enthusiast	6%	13%
Recreational cannabis user	10%	12%
Golf enthusiast	8%	12%
Road warrior	5%	10%

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

Base: U.S. Leisure Travelers (n=4,202), Likely to Visit Hawaii (n=824)
Source: MMGY Global's 2022 *Portrait of American Travelers*® "Spring Edition"

Demographics

	U.S. Leisure Travelers	Likely Hawaii Visitors
Male	50%	59%
Female	49%	41%
Other	1%	0%
Gen Zs	11%	10%
Millennials	30%	46%
Gen Xers	23%	25%
Young Boomers	17%	9%
Older Boomers	13%	7%
Have children under 18 at home	39%	60%
White	74%	74%
Hispanic	17%	21%
African American/Black	14%	13%
Asian	7%	8%
Native American	3%	2%
Pacific Islander	1%	1%
Other	2%	2%

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

Base: U.S. Leisure Travelers (n=4,202), Likely to Visit Hawaii (n=824)

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

Demographics

	U.S. Leisure Travelers	Likely Hawaii Visitors
Under \$30,000	13%	4%
\$30,000 - \$49,999	13%	7%
\$50,000 - \$74,999	18%	13%
\$75,000 - \$99,999	13%	15%
\$100,000 - \$124,999	10%	12%
\$125,000 - \$149,999	9%	14%
\$150,000 - \$249,999	17%	23%
\$250,000 - \$499,999	5%	8%
\$500,000 or more	2%	3%
4 years or less of high school	36%	24%
1-3 years of college	27%	21%
4 years of college	23%	31%
Some graduate school	4%	6%
Graduate/professional degree	10%	18%

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

Demographics

	U.S. Leisure Travelers	Likely Hawaii Visitors
South	37%	34%
West	25%	29%
Midwest	21%	20%
North	17%	17%
Employed (full or part-time)	58%	80%
Retired	26%	13%
Temporarily unemployed	6%	3%
Homemaker full-time	7%	2%
Student	2%	1%
Married/living together	70%	78%
Never married	17%	15%
Divorced/separated/widowed	13%	7%

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



THE HAWAII PROSPECT SUMMARY

KEY TAKEAWAY:

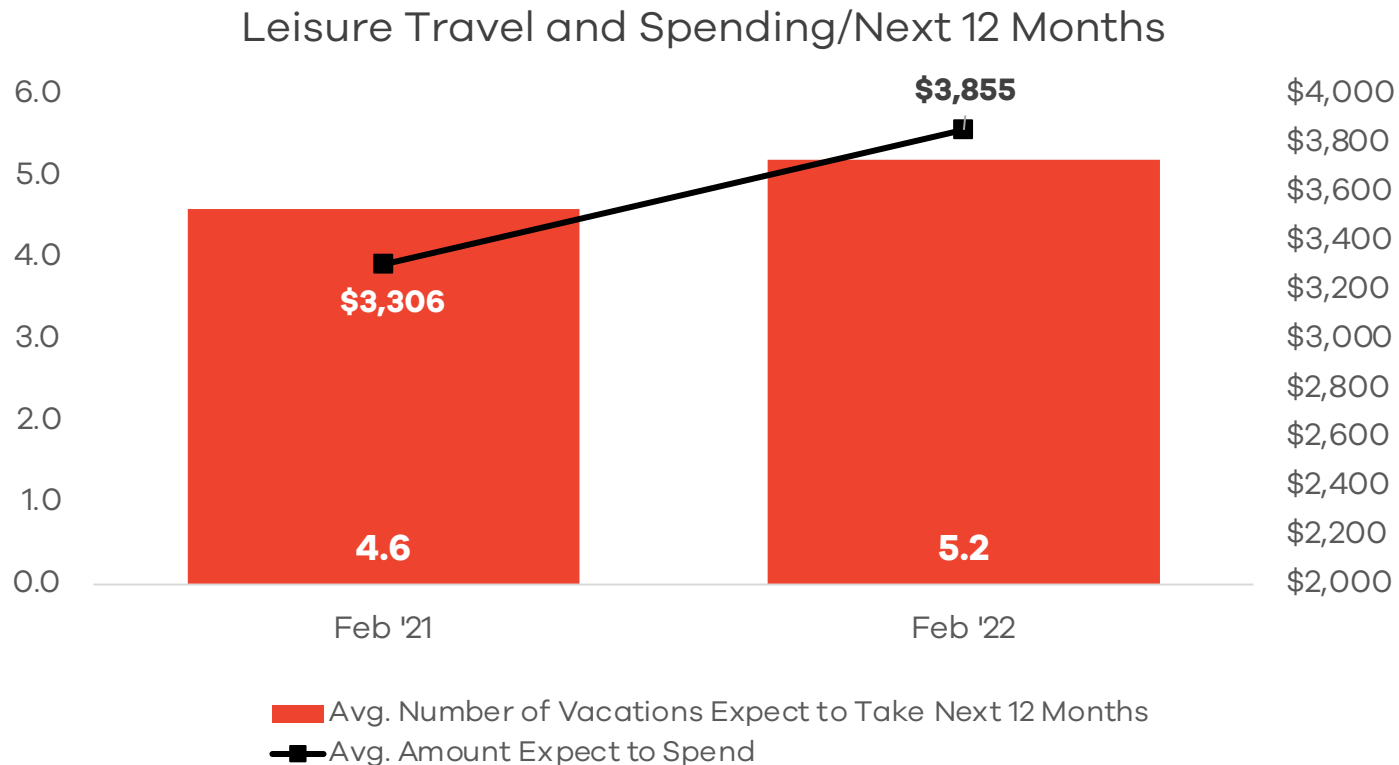
- Likely Hawaii Visitors describe themselves as a Beach Lover, Foodie and Family Traveler. They are more likely than the average U.S. Leisure Traveler to describe themselves as a Foodie, Wine Enthusiast, Theme Park Enthusiast, Luxury Traveler, World Traveler, All-Inclusive Enthusiast, and Cruise Lover.
- 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

Trip and Spending Intentions Are Up From February '21.



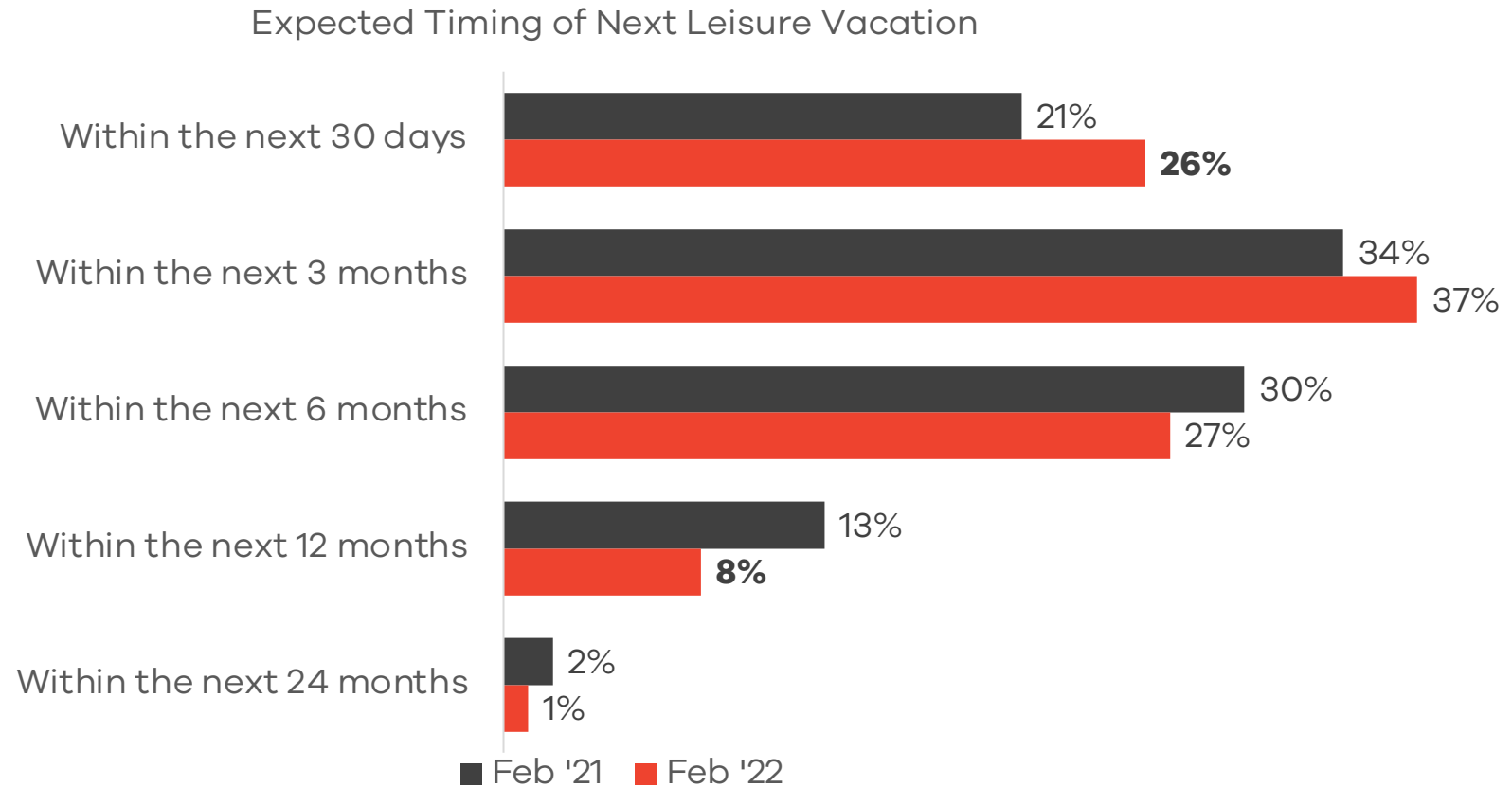
After a year of uncertainty due to COVID-19, travel and spending intentions for travel in the next 12 months of those likely to visit Hawaii have increased from this time last year.

Traveler Intentions: Over Time

Base: Likely to Visit Hawaii & Planning to Take a Trip in the Next 12 Months (n=812)

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

Short-Term Travel Intentions Are Up From February '21.



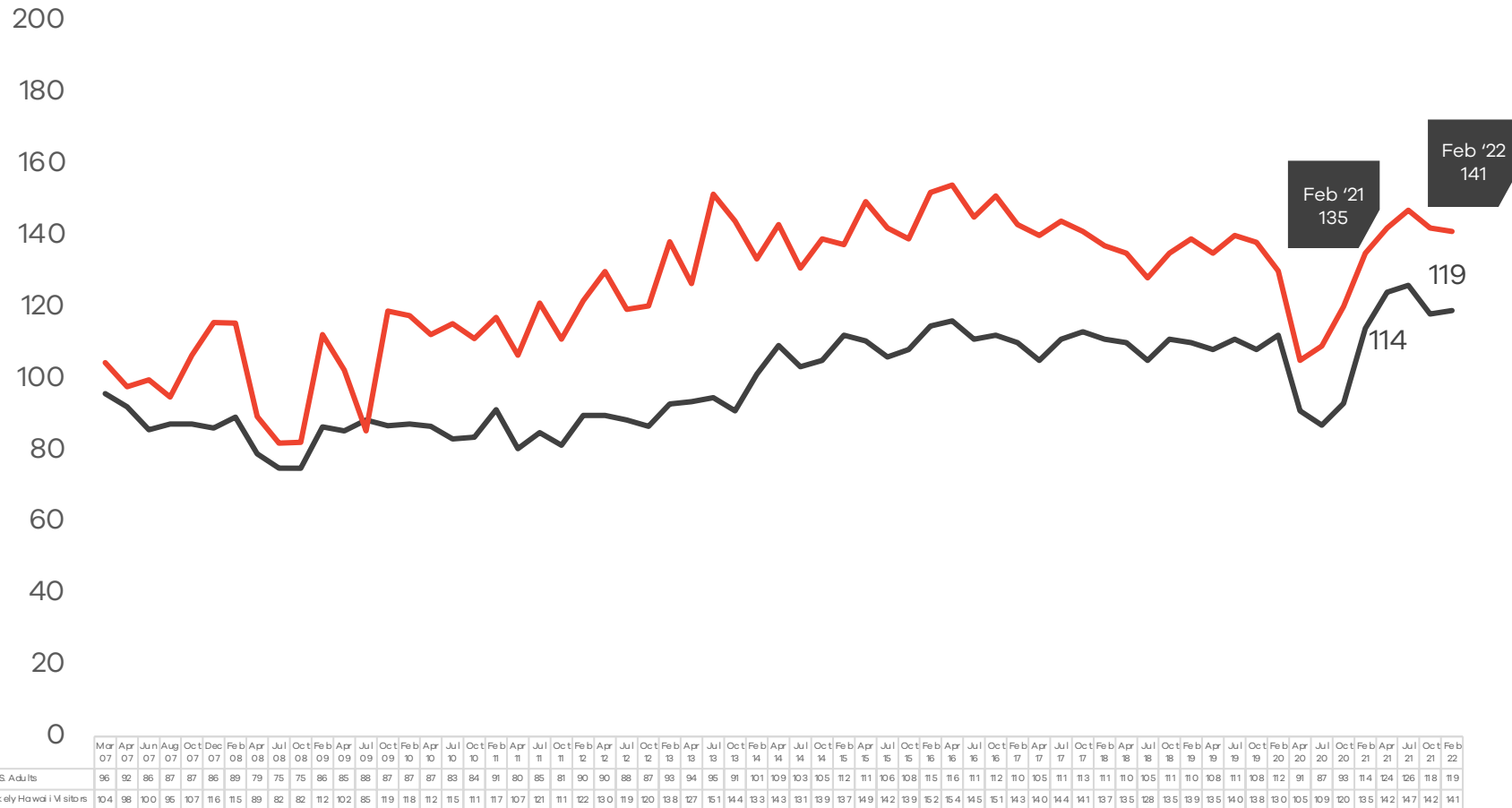
Traveler Intentions: Over Time

Data in bold indicates a significant difference from February 2021.

Base: Likely to Visit Hawaii (n=824)

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

Overall Traveler Sentiment Score: Up From One Year Ago – Similar To Last Quarter



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.

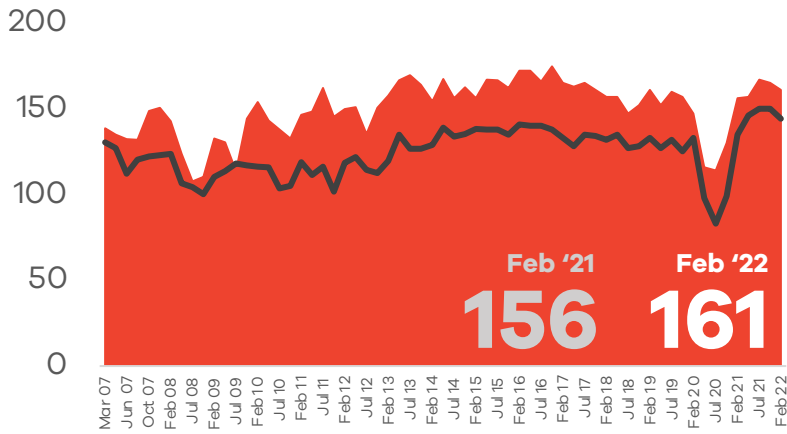
Traveler Sentiment Index™

Base: U.S. Adults (n=4,529) & Likely to Visit Hawaii w/o Air Travel (n=1,838)

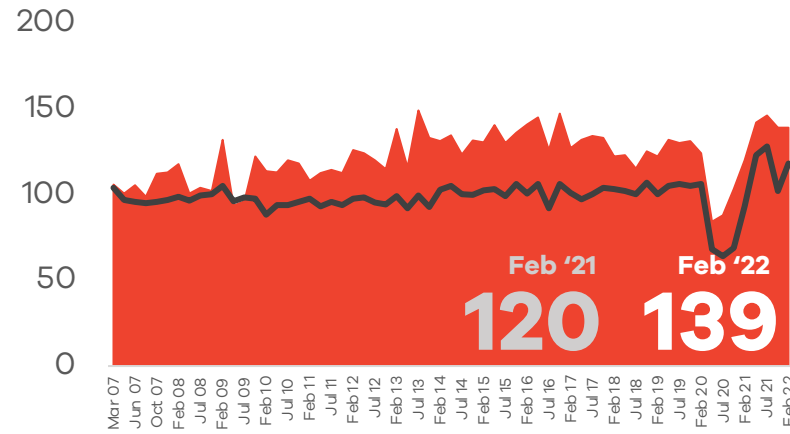
Source: MMGY Global's travelhorizons™/2022 Portrait of American Travelers® "Spring Edition"

Affordability of Travel Displayed The Only Decrease From 2021

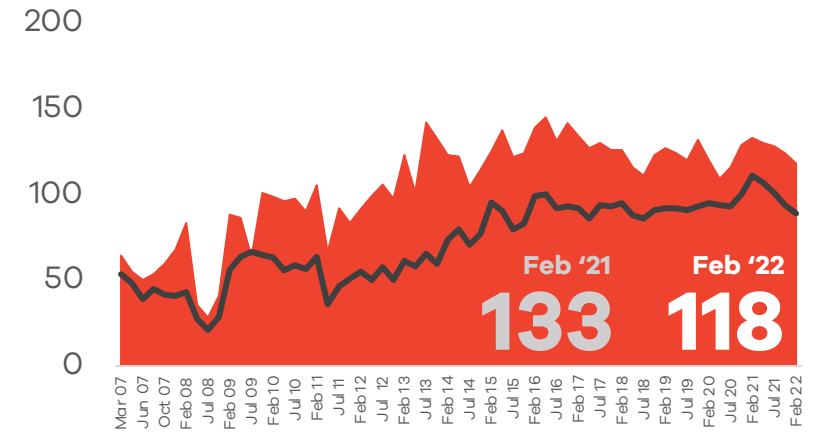
Interest in Travel



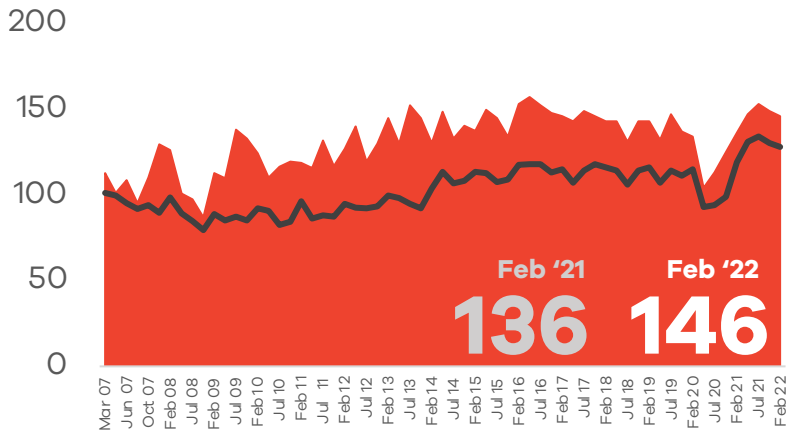
Perceived Safety of Travel



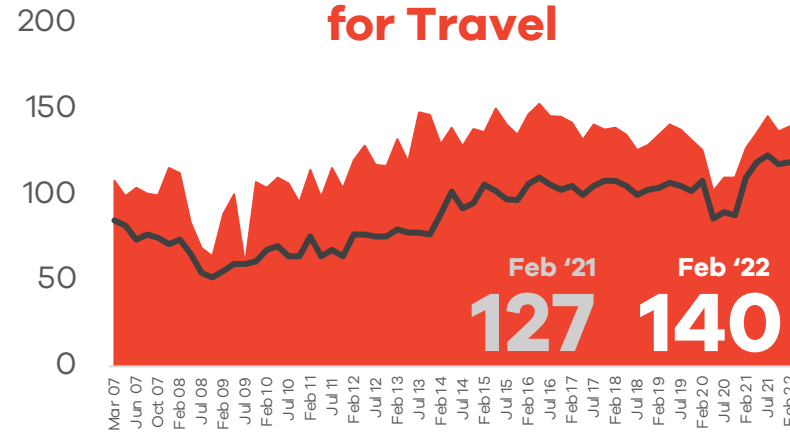
Affordability of Travel



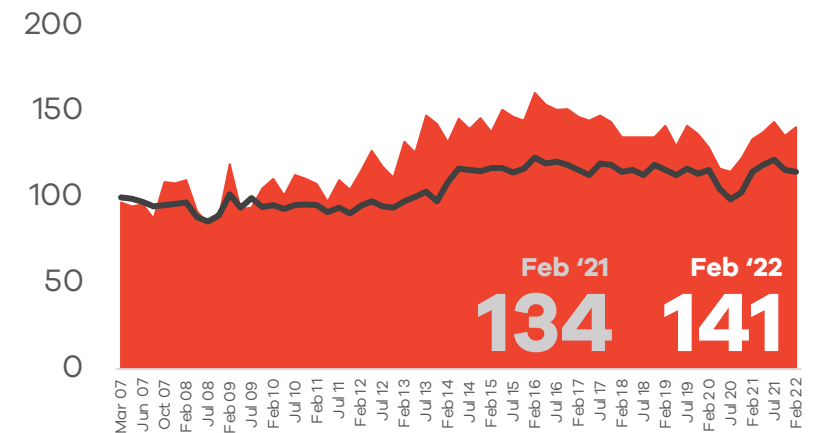
Time Available for Travel



Personal Finances Available for Travel



Quality of Service of Travel



Traveler Sentiment Index™

Base: U.S. Adults (n=4,529) (Black line) & Likely to Visit Hawaii w/o Air Travel (n=1,838) (Red fill)

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



TRAVEL OUTLOOK SNAPSHOT SUMMARY

KEY TAKEAWAY:

- Travel intentions and spending intentions of Likely Hawaii Visitors are up significantly from last year. They plan to take an average of 5.2 trips this year and spend an average of \$3,855 during that time.
- The overall Traveler Sentiment Score of these travelers stands at 141, up 6 points from this time last year. With the exception of affordability of travel which decreased 15 points, all other components increased from Feb '21.

WHAT IT MEANS:

Likely Hawaii Visitors are planning to travel this year, even more so than they did last year and they're feeling positively about many aspects of travel. But 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.

Barriers to Travel

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

% Who Perceive Each Travel Aspect To Be Safe	Feb '21	Feb '22
Traveling by personal car	78%	85%
Staying in a hotel or resort	60%	81%
Going to a beach	71%	79%
Going to a park	67%	79%
Visiting friends and family	63%	77%
Taking an overnight domestic trip	60%	76%
Staying in a vacation rental	63%	72%
Taking a domestic flight	58%	70%
Participating in snow sports	61%	70%
Visitors coming to my city or town from outside the local area	49%	67%
Taking an overnight international trip	52%	61%
Visiting a theme or amusement park	44%	58%
Attending a sporting event	42%	57%
Attending a concert/festival	41%	57%
Taking an ocean cruise	44%	56%
Attending a conference or convention	44%	56%
Taking a river cruise	41%	55%

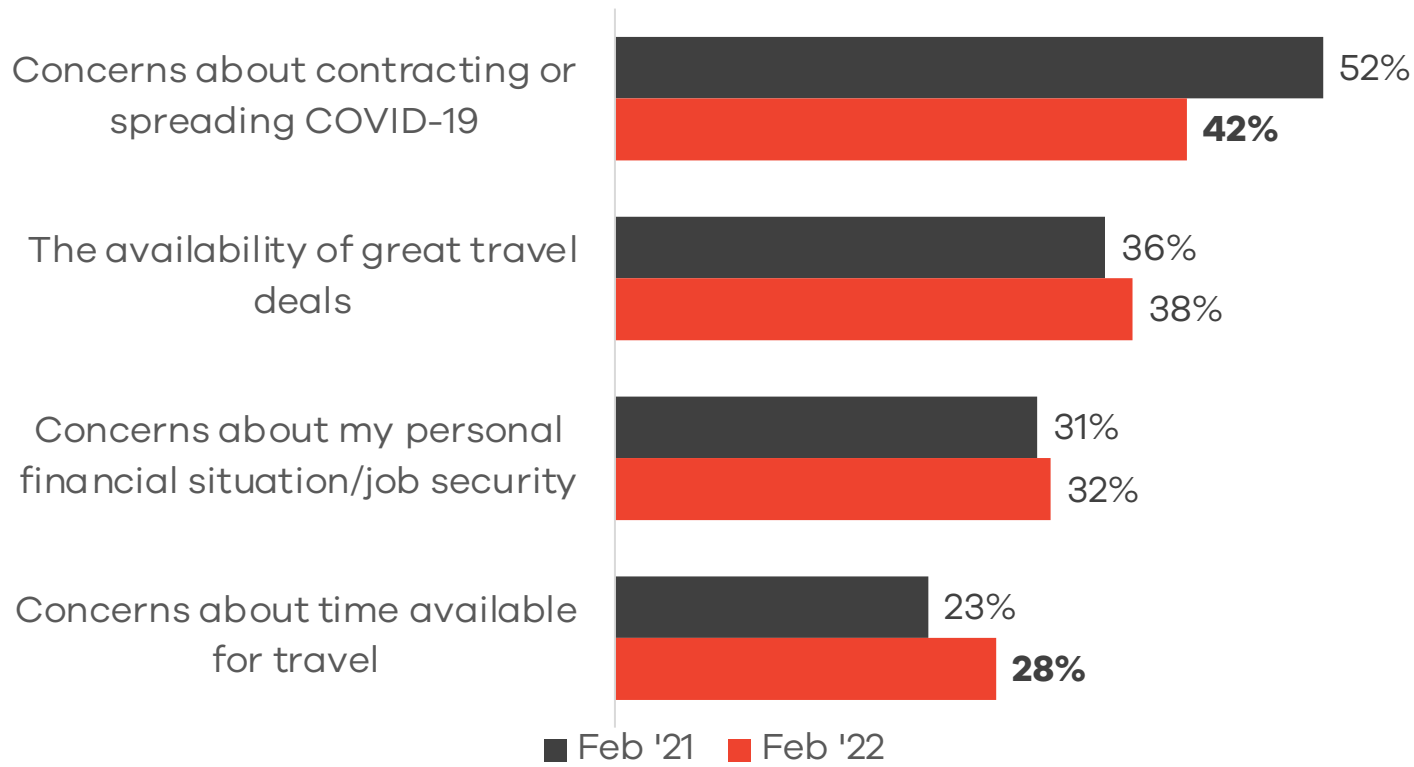
Data in bold indicates a significant difference from February 2021.

Base: Likely to Visit Hawaii (n=824)

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

Fewer Likely Hawaii Visitors Are Concerned About COVID-19 When Planning Travel.

% Who Are Extremely Impacted By...



/ While concerns around COVID-19 decreased from last year, more of these travelers are now concerned about time available for travel.

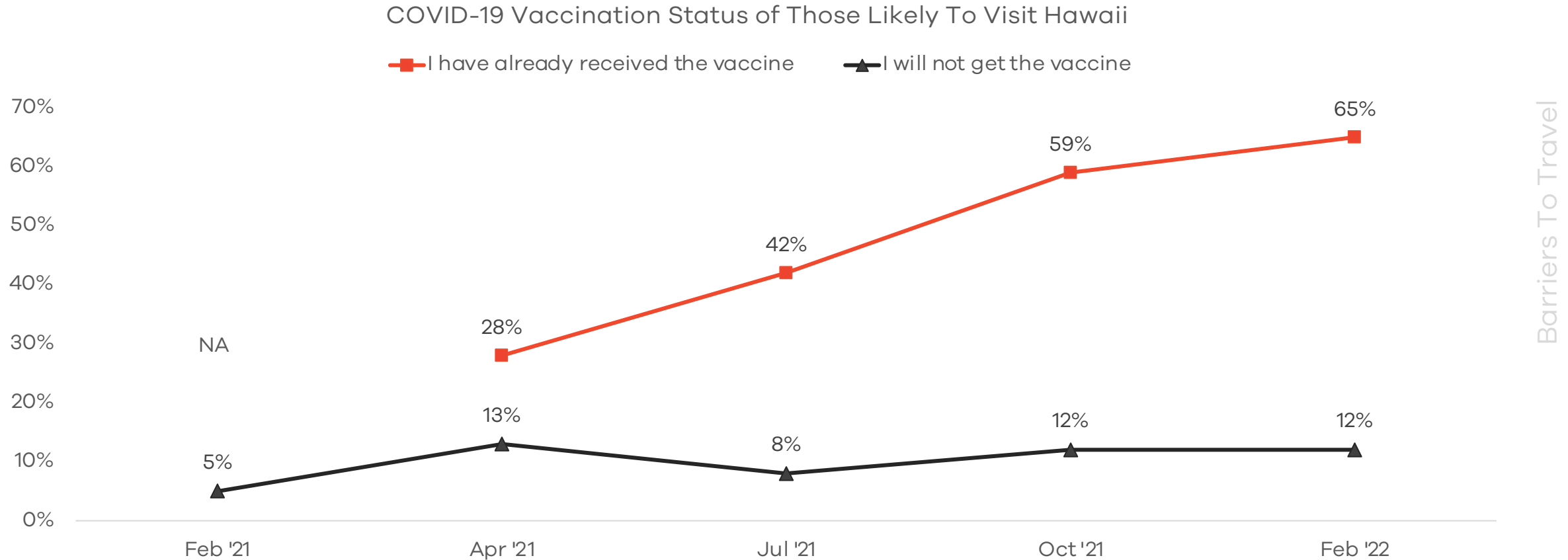
Barriers To Travel

Data in bold indicates a significant difference from February 2021.

Base: Likely to Visit Hawaii (n=824)

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

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



NA: Answer option was not asked in this wave

Base: Likely to Visit Hawaii (n=824)

Source: MMGY Global's 2022 *Portrait of American Travelers*® "Spring 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 4 in 10 Likely Hawaii Visitors, this percentage is down from half this time last year.
- We also see that more Likely Hawaii Visitors perceive many aspects of travel to be safe than did so last year. 8 in 10 consider staying in a hotel/resort or going to the beach to be safe, while 7 in 10 consider taking a domestic flight to be safe, both up significantly from last year.

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. Barring any major changes in COVID-19 and the pandemic, we hope to see this trend continue.

A grayscale photograph of a tropical landscape. In the foreground, there are several palm trees and other tropical vegetation. A body of water, possibly a lake or a wide river, occupies the middle ground, reflecting the sky and the surrounding trees. The background shows more dense foliage and a hazy horizon. The overall scene is peaceful and scenic.

Sustainability in Travel

Spring Module

93% 2021 89% 2022

of likely Hawaii visitors are willing to change travel behavior to reduce impact on the environment.

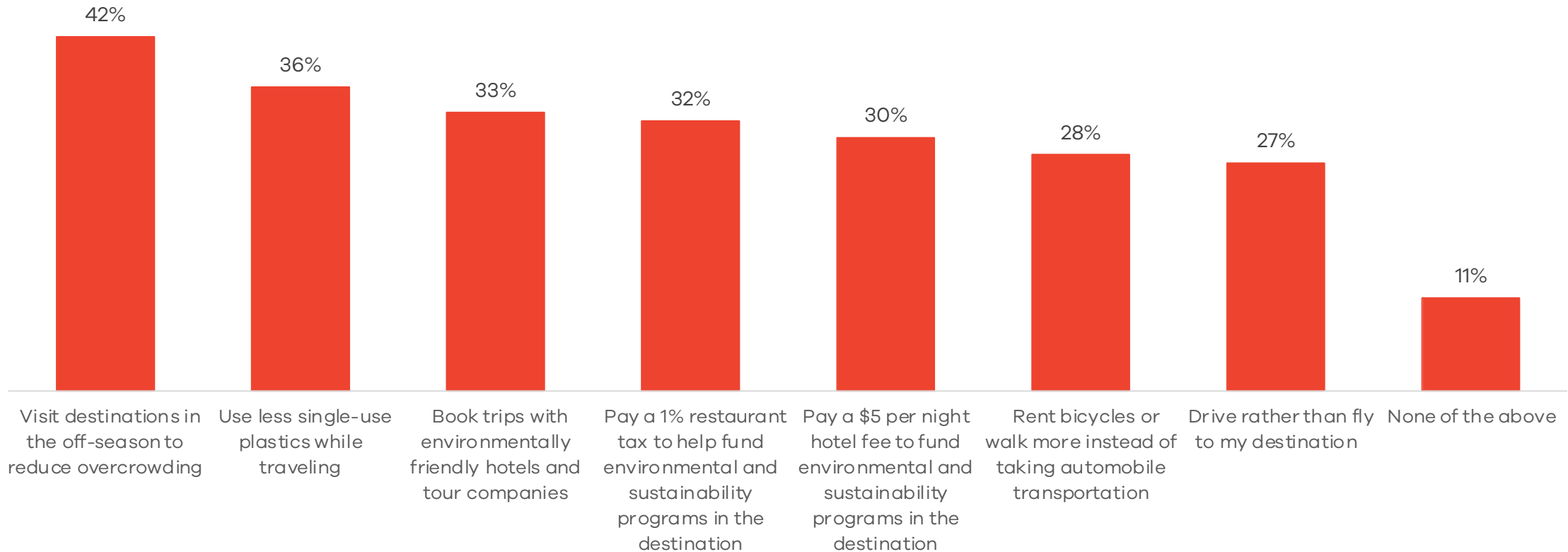
A Majority of Travelers Indicate They Are Willing to Change Travel Behavior to Reduce Their Environmental Impact

Base: Likely to Visit Hawaii (n=824)

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

Likely Hawaii Visitors Are Most Willing to Travel In The Off-Season, Cut Back on Single-Use Plastics, and Book With Environmentally-Friendly Service Providers

Actions Willing to Take to Reduce Impact on Environment

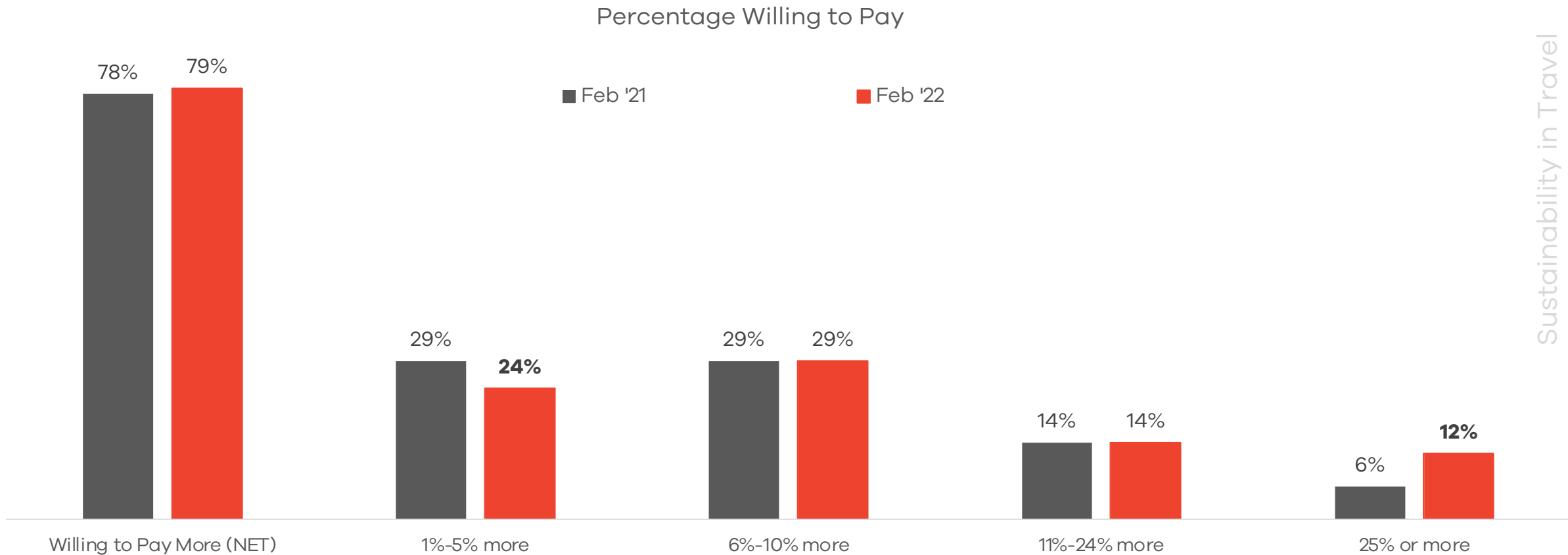


Sustainability in Travel

Base: Likely to Visit Hawaii (n=824)

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

8 in 10 Likely Hawaii Visitors are Willing to Pay More To Patronize Travel Providers Demonstrating Environmental Responsibility



Data in bold indicates a significant difference from February 2021.

Base: Likely to Visit Hawaii (n=824)

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

More Travelers Indicate They Are Impacted By A Provider's Environmental Efforts When Making Travel Decisions

Data in bold indicates a significant difference from February 2021.

Base: Likely to Visit Hawaii (n=824)

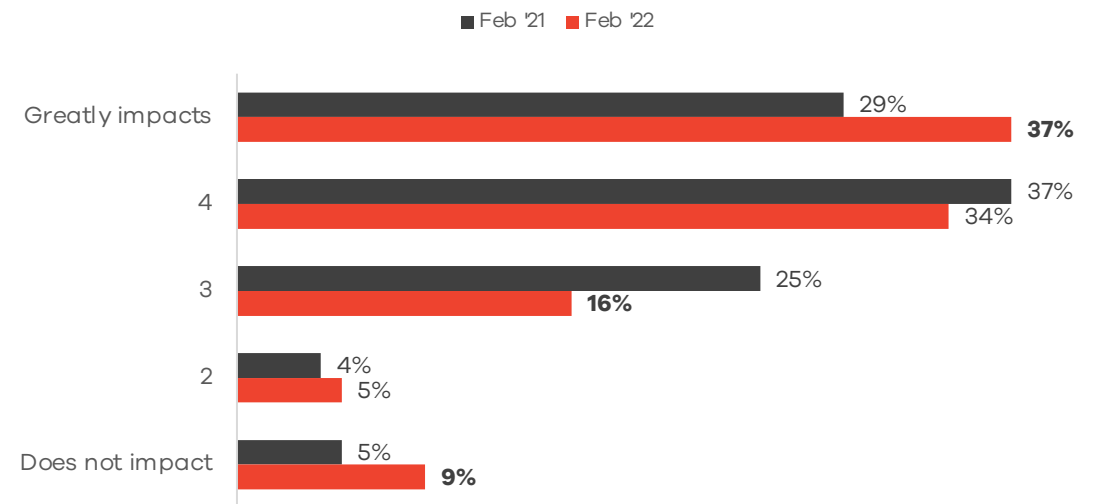
Source: MMGY Global's 2022 *Portrait of American Travelers* "Spring Edition"

29%
2021

37%
2022

of likely Hawaii visitors indicate a travel service provider's focus on sustainability and environmental considerations **greatly** impacts their travel decision-making.

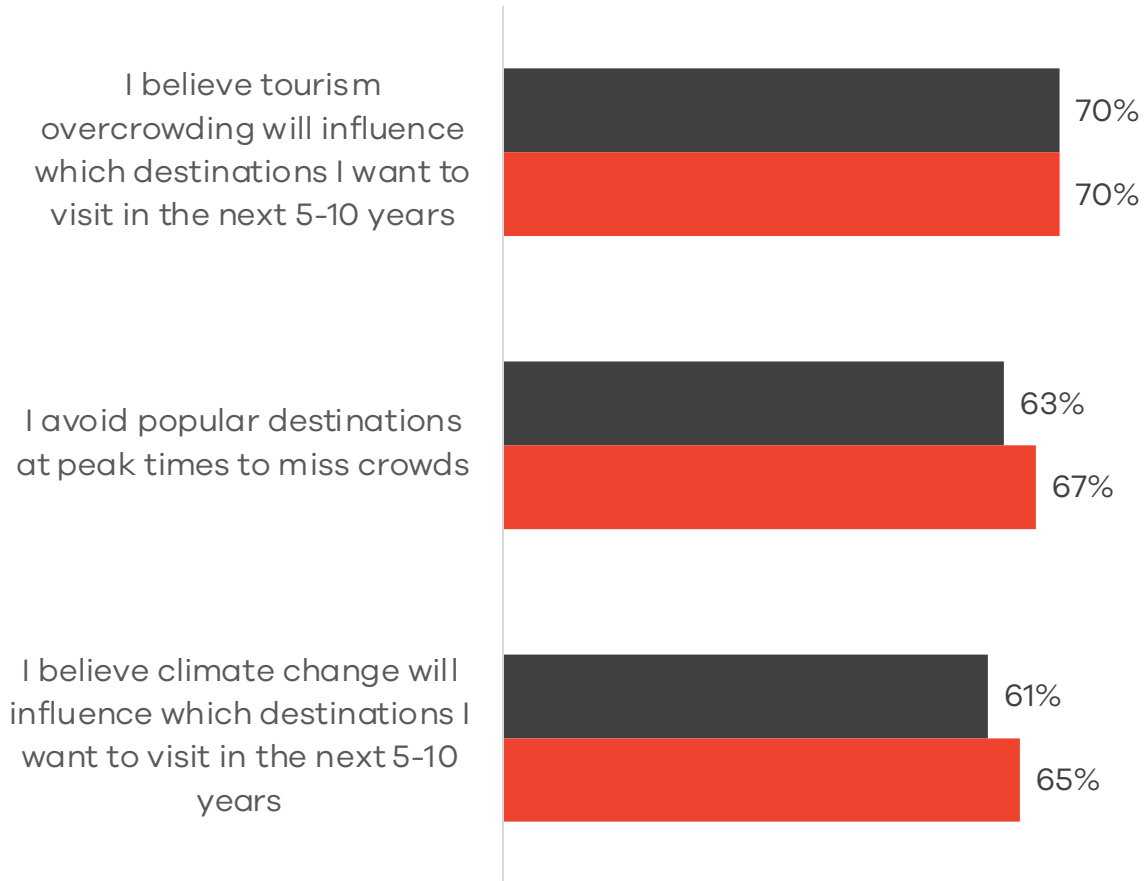
Impact of a Provider's Environmental Efforts When Making Travel Decisions



Sustainability in Travel

% Strongly/Somewhat Agree

■ Feb '21 ■ Feb '22



Likely Hawaii Visitors Are Thinking About Overcrowding and Climate Change When Making Future Travel Plans

Base: Likely to Visit Hawaii (n=824)

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



SUSTAINABILITY IN TRAVEL SUMMARY

KEY TAKEAWAY:

- Traveling sustainably is increasingly important to nearly all Likely Hawaii Visitors.
 - 9 in 10 are willing to change their travel behaviors in order to reduce their impact on the environment
 - 8 in 10 are willing to pay more to patronize travel providers that demonstrate environmental responsibility.
 - 7 in 10 are impacted by a travel service provider's focus on sustainability and environmental considerations when making travel decisions, up from those who indicated so last year.

WHAT IT MEANS:

Sustainability has shown that it is not a fleeting trend and is important to many travelers, especially those likely to visit Hawaii. Continuing to educate and show visitors that this is an important initiative to Hawaii Tourism will both have a positive impact on tourism but also on the destination and its residents.

Sources of Travel Information

Spring Module

Online Reviews Continue To Be Trustworthy Sources of Information To Likely Hawaii Visitors When Planning Travel

Data in bold indicates a significant difference from February 2021.

Base: Likely to Visit Hawaii (n=824)

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

% Strongly/Somewhat Agree

■ Feb '21 ■ Feb '22

I trust reviews/ratings of fellow travelers on review sites over those of traditional ratings organizations (AAA, Michelin, etc.)



I trust online reviews over the opinions of my friends and family



Sources of Travel Information

The Top Websites Used For Travel Information Among Likely Hawaii Visitors Are Google, YouTube, and Expedia

Websites Used Regularly for Travel Information	Feb '21	Feb '22
Google	42%	41%
YouTube	31%	31%
Expedia	36%	29%
Hotels.com	28%	26%
Tripadvisor	36%	25%
Specific airline brand website	23%	25%
Specific hotel brand website	22%	23%
Booking.com	32%	23%
AAA Travel	18%	21%
Trivago	25%	21%
Travelocity	24%	19%
Priceline	25%	16%
Specific cruise brand website	18%	16%
Kayak	20%	15%
Orbitz	16%	15%
Specific vacation destination website	15%	14%
Yelp	14%	13%
Travel blogs	16%	13%

Data in bold indicates a significant difference from February 2021.

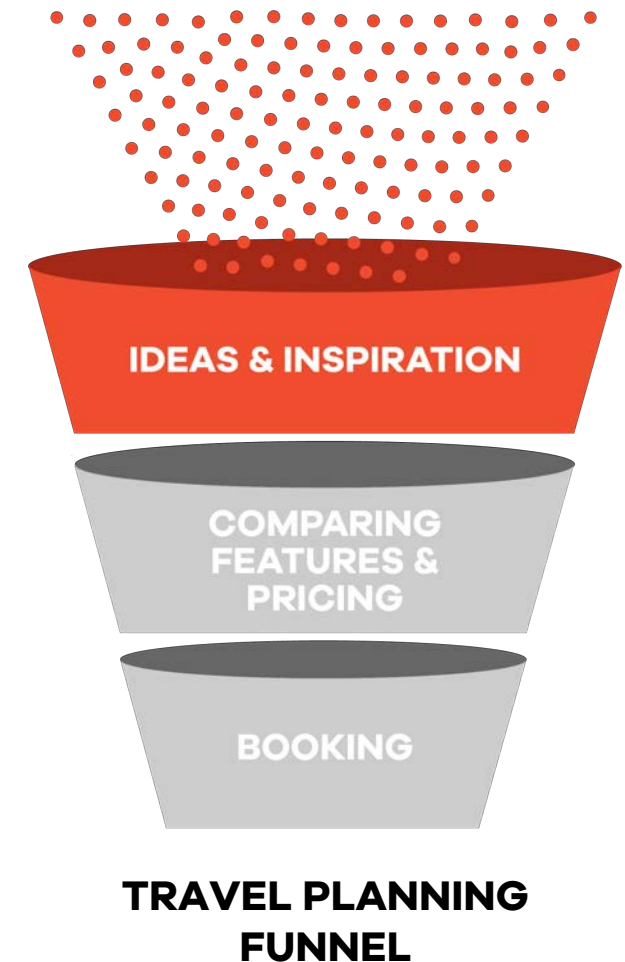
Base: Likely to Visit Hawaii (n=824)

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

Likely Hawaii Visitors Turn To Friends/Family and Travel Review Sites When Looking For Travel Ideas and Inspiration

Sources Consider for Ideas & Inspiration	Feb '21	Feb '22
Friends and family	40%	39%
Travel review websites	40%	32%
Destination websites (Visit Orlando, Destination DC, etc.)	30%	26%
Travel service provider websites (Hilton, Delta, etc.)	21%	26%
Streaming TV services (Netflix, Hulu, etc.)	NA	26%
Online visitor guides	31%	25%
Online travel agencies (Expedia, Orbitz, etc.)	31%	25%
Video sharing websites (YouTube, etc.)	20%	23%
Online/social media advertising	29%	22%
Social media posts from destinations or travel service providers	24%	22%
Television shows	25%	21%
Television advertising	24%	21%
Magazine/newspaper advertisements	21%	20%
Email from the travel service provider	17%	20%
Magazine/newspaper articles	24%	19%
Social media influencers	22%	17%
Email from the destination	17%	17%
Streaming audio (Pandora, Spotify, etc.)	NA	16%
Printed visitor guides	20%	15%
Content from publishers (Buzzfeed, New York Times, etc.)	25%	15%
Traditional travel agents	13%	13%
Digital newspaper/magazine	NA	13%
Podcasts	NA	13%
Direct mail	17%	12%
Radio shows/advertising	12%	12%
Billboards	15%	12%

Data in bold indicates a significant difference from February 2021.



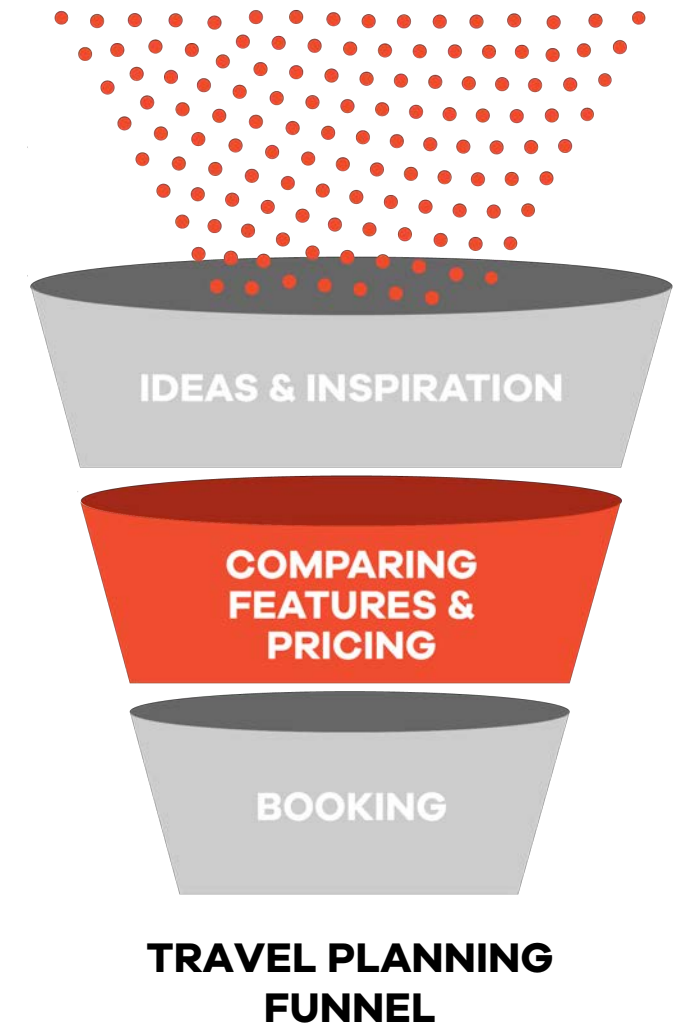
Base: Likely to Visit Hawaii (n=824)

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

Travel Review Websites and Service Provider Websites Are Top Sources for Comparing Features and Pricing For Likely Hawaii Visitors

Sources Consider for Comparing Features and Pricing	Feb '21	Feb '22
Friends and family	35%	31%
Travel review websites	27%	27%
Travel service provider websites (Hilton, Delta, etc.)	24%	26%
Online travel agencies (Expedia, Orbitz, etc.)	32%	24%
Online visitor guides	26%	22%
Destination websites (Visit Orlando, Destination DC, etc.)	28%	21%
Printed visitor guides	20%	20%
Video sharing websites (YouTube, etc.)	19%	19%
Email from the destination	22%	18%
Streaming TV services (Netflix, Hulu, etc.)	NA	17%
Magazine/Newspaper articles	21%	17%
Television advertising	18%	16%
Television shows	16%	16%
Social media posts from destinations or travel service providers	21%	16%
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Magazine/Newspaper advertisements	20%	15%
Content from publishers (Buzzfeed, New York Times, etc.)	17%	15%
Email from the travel service provider	16%	14%
Traditional travel agents	17%	14%
Direct mail	15%	13%
Streaming audio (Pandora, Spotify, etc.)	NA	10%
Digital newspaper/magazine	NA	10%
Podcasts	NA	10%
Billboards	11%	10%
Radio shows/advertising	12%	8%

Data in bold indicates a significant difference from February 2021.



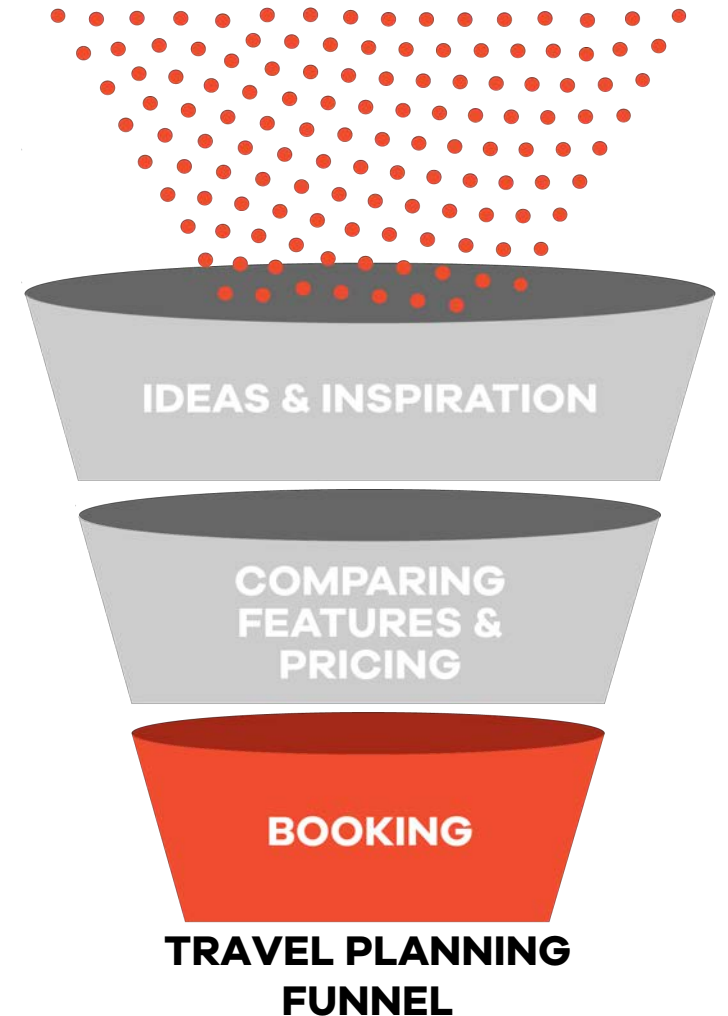
Base: Likely to Visit Hawaii (n=824)

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

Travel Service Provider Websites Are Now The Top Source Used For Reservations Among Likely Hawaii Visitors

Sources Used When Making Reservations	Feb '21	Feb '22
Travel service provider websites (Hilton, Delta, etc.)	39%	43%
Online travel agencies (Expedia, Orbitz, etc.)	49%	39%
Calling travel service provider directly	31%	33%
Google Travel (Google flights/hotels)	35%	33%
Travel review websites	29%	27%
Destination websites (Visit Orlando, Destination DC, etc.)	32%	26%
Traditional travel agents	24%	26%
Travel service provider app	20%	25%

Data in bold indicates a significant difference from February 2021.

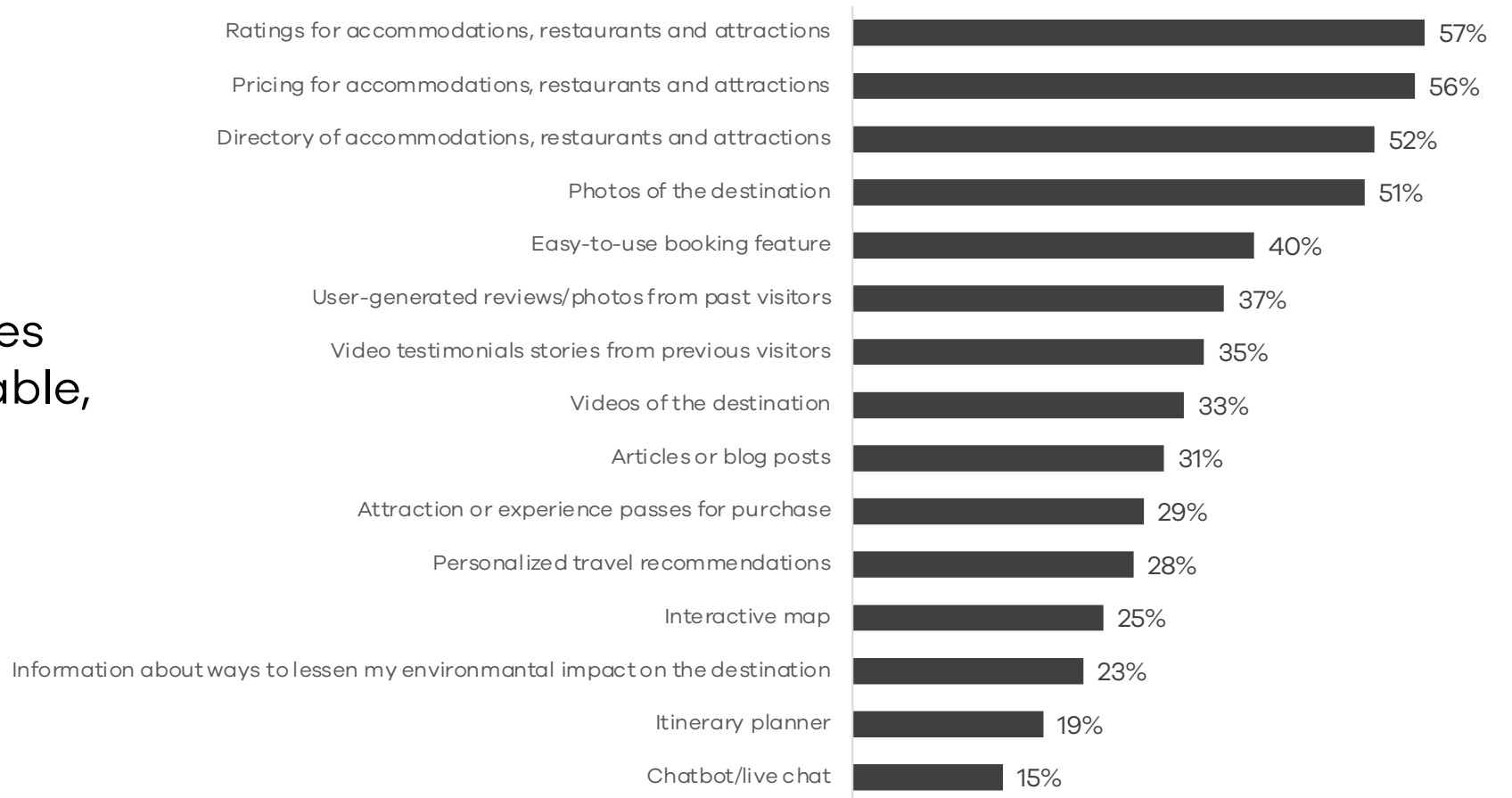


Likely Hawaii Visitors Most Value Accommodation, Restaurant And Attraction Information on a Destination Website

72%
Likely Hawaii
Visitors

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

Valuable Destination Website Features
Among Those Who Regularly Visit Destination Websites



Sources of Travel Information

Base: Likely to Visit Hawaii (n=824) & Likely to Visit Hawaii who regularly visit destination websites for travel information (n=119)

Source: MMGY Global's 2021 *Portrait of American Travelers*®



SOURCES OF TRAVEL INFORMATION SUMMARY

KEY TAKEAWAY:

- After the use of online travel agencies displayed decreases in all stages of the travel planning process, travel service provider websites have surpassed them in usage by Likely Hawaii Visitors becoming the top source for making reservations.

This is likely due to the need for the flexibility to reschedule or cancel travel without penalty and booking directly provides more reassurance than booking with OTAs.

- Online travel reviews continue to be important and trustworthy sources of information for Likely Hawaii Visitors. 7 in 10 agree that they trust online reviews by fellow travelers more than traditional rating organizations or even their own friends and family. Travel Review Websites are also frequently used during the ideas & inspiration stage and when comparing features and pricing.



SOURCES OF TRAVEL INFORMATION SUMMARY

KEY TAKEAWAY:

- While they may not be the most used source throughout the travel planning process, destination websites are considered to provide the most up-to-date and reliable information about a destination by more than 7 in 10 Likely Hawaii Visitors. The features considered most valuable on destination websites are ratings, pricing, and a directory of accommodations, restaurants, and attractions, as well as photos of the destination.

WHAT IT MEANS:

Destination websites continue to be essential in a destination's online presence and are important to travelers as they are considered to offer the most reliable information about a destination.

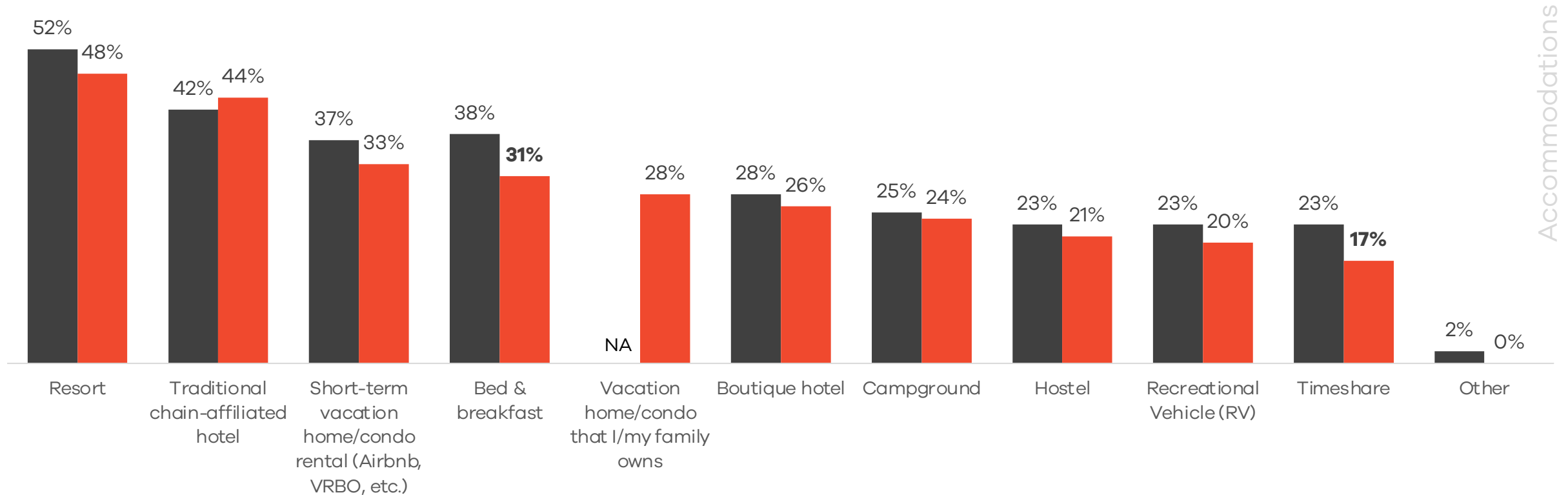
Accommodations

Spring Module

Likely Hawaii Visitors Are Most Interested in Staying at Resorts or Traditional Chain-Affiliated Hotels

Accommodations Interested in Using During Next 12 Months

■ Feb '21 ■ Feb '22



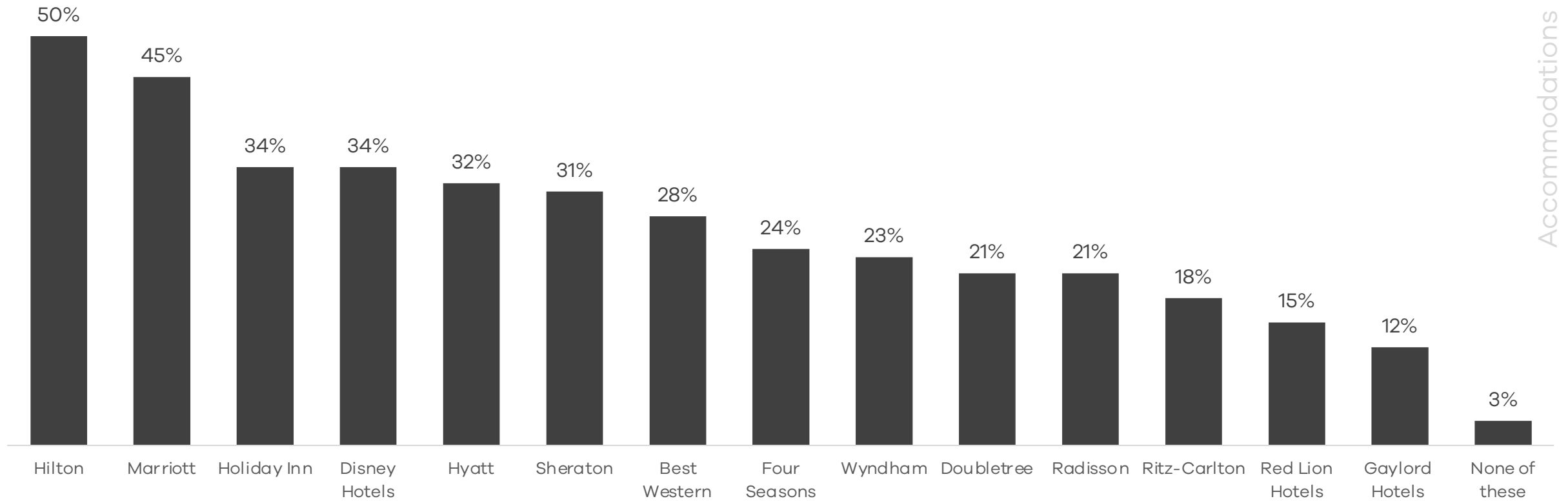
Data in bold indicates a significant difference from February 2021.

Base: Likely to Visit Hawaii (n=824)

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

Hilton And Marriott Garner The Most Interest From Likely Hawaii Visitors

Hotel Brands Would Consider For Future Vacations

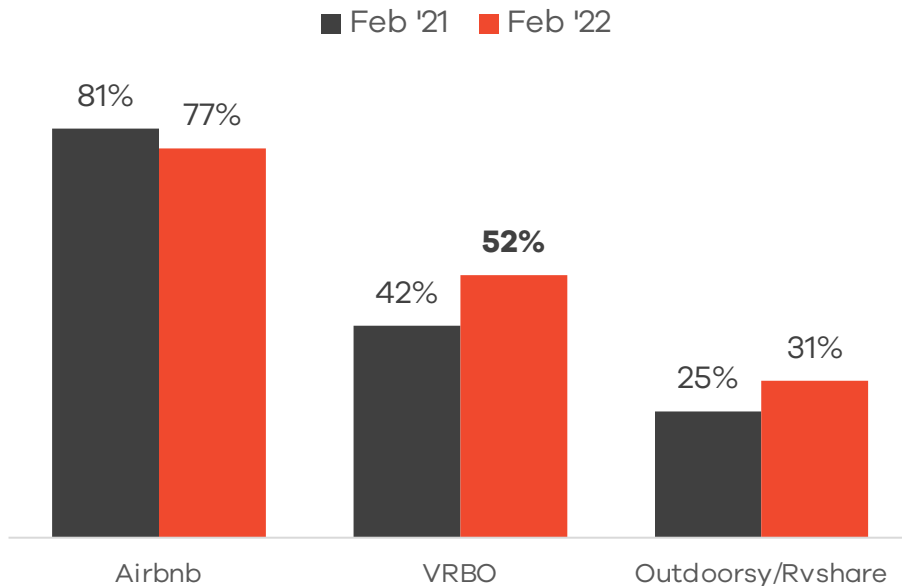


Base: Likely to Visit Hawaii (n=824)

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

Although Airbnb Continues To Dominate The Short-Term Rental Market, VRBO Displays Large Increase Among Likely Hawaii Visitors

Short-Term Vacation Rental Companies Likely to Use During Next 12 Months (Among travelers interested in short-term rentals)



Reasons For Using a Short-Term Rental Instead of a Traditional Hotel (Among those interested in short-term rentals)

I like the idea of vacationing in a home away from home	48%
I want to stay in a unique or unusual place	41%
Short-term rentals are less expensive than hotels	36%
Short-term rentals are typically more interesting in design than traditional hotels or resorts	36%
Short-term rentals are better for accommodating a large group	35%
Due to the COVID-19 pandemic, I feel that short-term rentals are safer than hotels	34%
I want to stay near the people I am visiting	34%
Short-term rentals allow me to vacation with locals in their neighborhood	25%
Other	3%

Accommodations

Data in bold indicates a significant difference from February 2021.

Base: Likely Hawaii visitors interested in short-term rentals (n=268)

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

Location and Value For The Price Are The Most Important Factors When Choosing Accommodations For Those Likely To Visit Hawaii

Important Factors When Choosing Accommodations	% Find Important
Location	40%
Value for the price	38%
Free breakfast	37%
Room rate	36%
Cleanliness standards/promise	35%
Food/restaurant options available at accommodation	34%
Previous experience/reputation of the accommodation brand	31%
Free internet access from public areas (pool, lobby, etc.)	30%
Loyalty/frequent stay program	30%
Swimming pool	29%
Located within walking distance of restaurants/bars	27%
All-inclusive stay package	25%
Recommendation of friends/family	24%
Complimentary local transportation to restaurants/shopping	22%
24-hour room service	21%
Consumer reviews	20%
Complimentary late check-out option	20%
On-site fitness center	18%
On-site spa	16%
Wellness focus	16%
Kids' club/organized family activities	15%
Pets allowed to stay in room	14%
Communal space to hang out, work or socialize	12%

Base: Likely to Visit Hawaii (n=824)

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

Free Internet Access And Having A Refrigerator Are The Two Most Important In-Room Features When Selecting A Hotel For Those Likely To Visit Hawaii

Importance of In-Room Features/Attributes	% Find Important
Free-internet access	40%
Refrigerator (for personal use)	37%
Size and/or layout of room	32%
Microwave	30%
Proper water temperature and pressure	30%
Premium mattress	31%
Free bottled water in room	29%
Multiple electrical outlets for charging personal devices	26%
Sound-proof room	26%
Balcony	26%
Free premium television channels (HBO, Starz, etc.)	26%
Premium bed linens	25%
Premium soaps, shampoos, conditioners	23%
Free premium movie streaming channels (Netflix, Disney, etc.)	26%
Selection of pillows	19%
In-room dining service without additional fees or delivery charges	22%
In-room mini-bar/refrigerator stocked with drinks/snacks	20%
Spa-style bathtub	20%
Ability to watch in-room entertainment on personal mobile devices	17%
Hardwood/tile flooring	14%
Remote access to guest room from smart phone	15%
Biometric access to guest room	11%

Base: Likely to Visit Hawaii (n=824)

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



ACCOMMODATIONS SUMMARY

KEY TAKEAWAY:

- Resorts and traditional chain-affiliated hotels are the most popular accommodations among Likely Hawaii Visitors. Hilton and Marriott garner the most interest followed by Holiday Inn, Disney Hotels, Hyatt, and Sheraton. These travelers find location, value for the price, free breakfast, room rate and cleanliness to be important when choosing accommodations. As for in-room features, they find free-internet access and a refrigerator to be important.

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, a curved beach with a sandy shore meets the ocean. In the background, a dense city skyline with numerous high-rise buildings is situated along the coast. A prominent mountain, likely Diamond Head, is visible in the distance. The entire image is overlaid with a semi-transparent grey filter.

Vacation Motivators & Activities

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

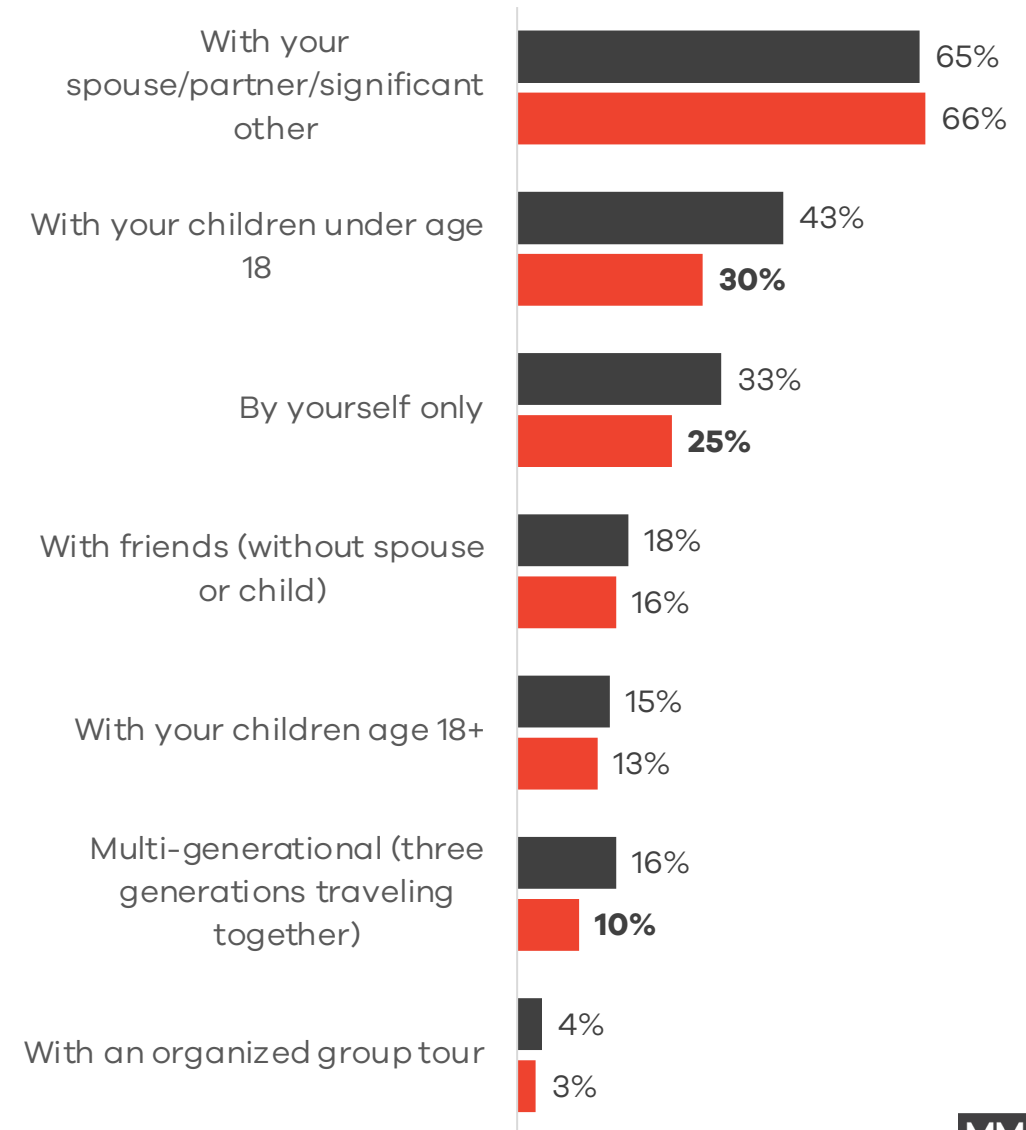
Data in bold indicates a significant difference from February 2021.

Base: Likely Hawaii visitors who intend to travel during the next six months (n=774)

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

Travel Party During Next Six Months

■ Feb '21 ■ Feb '22



Significantly More Likely Hawaii Visitors Are Planning to Take a Domestic Flight and Visit Friends and Family in The Next 6 Months Than Planned To Do So in Feb '21

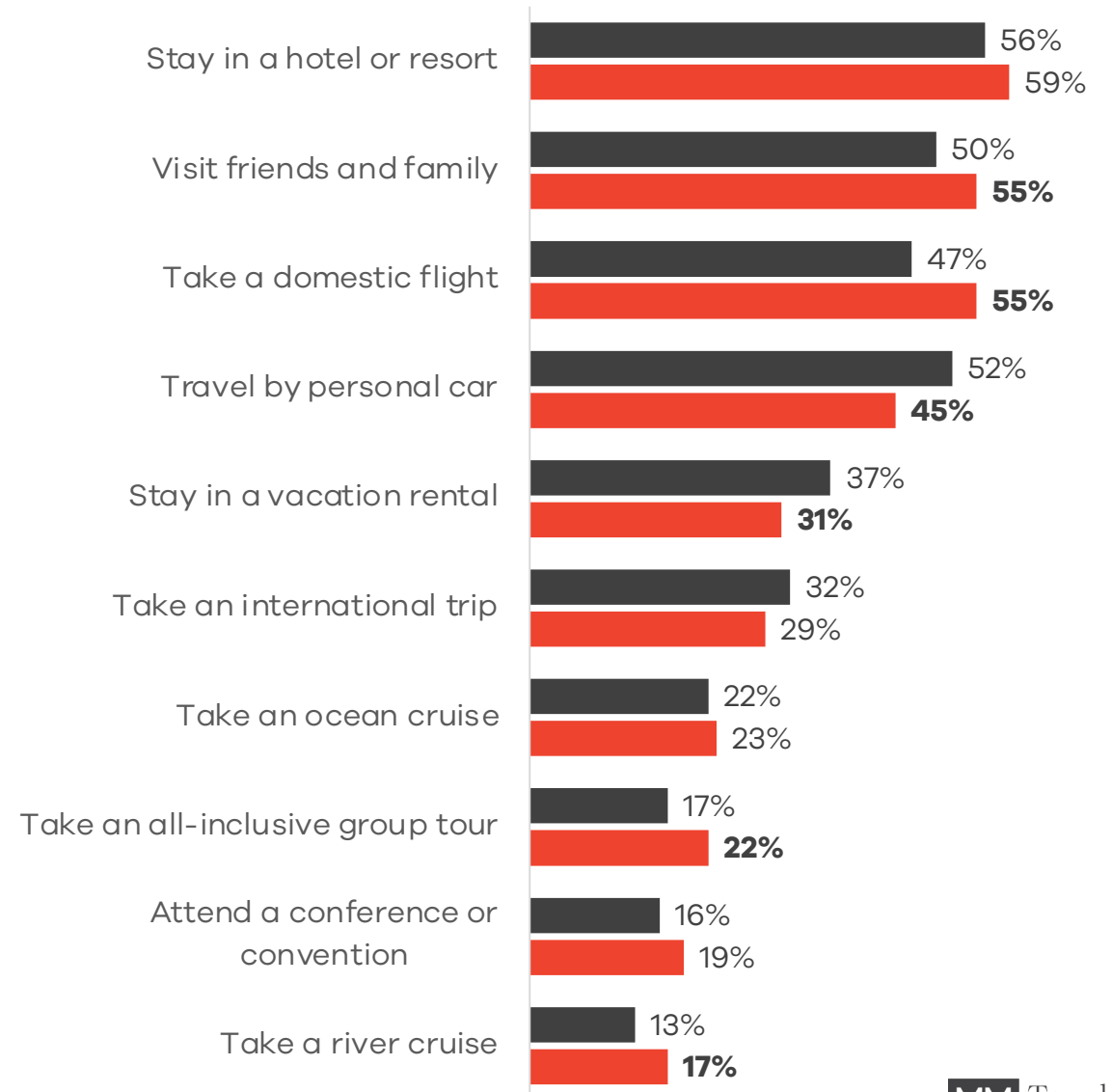
Data in bold indicates a significant difference from February 2021.

Base: Likely Hawaii visitors who intend to travel during the next six months (n=774)

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

Travel Expectations in the Next 6 Months

■ Feb '21 ■ Feb '22



Vacation Motivators & Activities

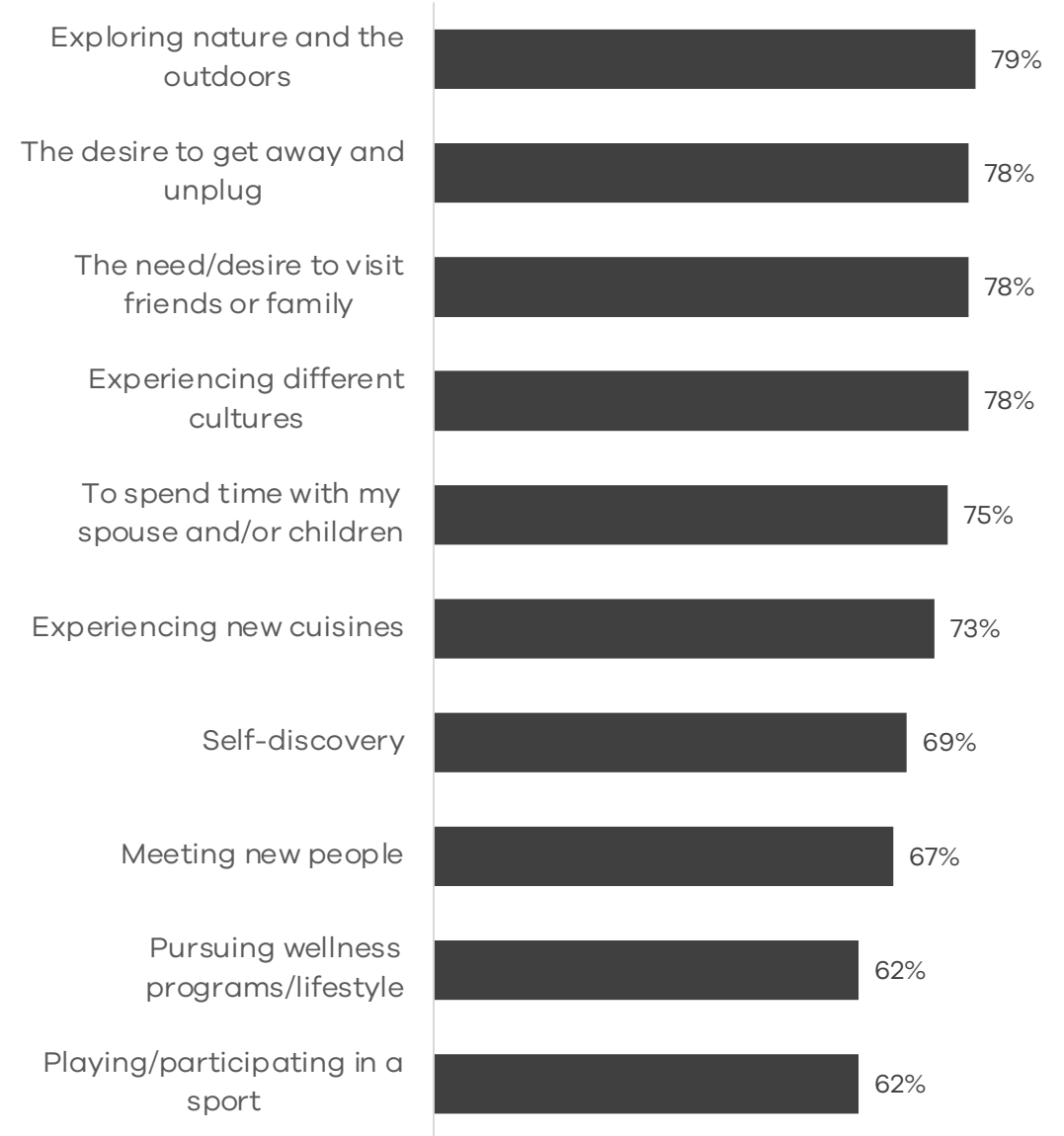
Exploring Nature, Unplugging, Visiting Friends/Family, and Experiencing Different Cultures Are The Top Reasons Those Likely to Visit Hawaii Travel

Data in bold indicates a significant difference from February 2021.

Base: Likely to Visit Hawaii (n=824)

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

Vacation Motivators



Vacation Motivators & Activities

What Destination Attributes Influence Choice of Destination?

Influential When Selecting a Destination	Feb '21	Feb '22
Beautiful scenery	59%	59%
Safety	50%	50%
Food and drink scene	47%	50%
Outdoor/nature activities	48%	42%
Historical significance of a destination	40%	40%
Focus on family activities	30%	33%
A sense of tradition (place family has traditionally visited)	26%	29%
The ethnic diversity and multicultural population of a destination	33%	27%
The destination's reputation for environmental responsibility	26%	27%
Nightlife/bars	30%	25%
Music scene	35%	23%
The destination's commitment to social justice and equality	22%	18%
LGBTQ+ travel offerings	13%	8%

Data in bold indicates a significant difference from February 2021.

- / Beautiful scenery is the top feature travelers look for when selecting a destination.
- / The food and drink scene is equally as influential as the safety of the destination.

Activities of Interest on Vacation

	Feb 21	Feb '22
Beach experiences	49%	49%
Shopping	47%	41%
Historical sites	40%	41%
Visiting a state or national park	44%	37%
Visiting a museum	39%	35%
Visiting a theme or amusement park	33%	31%
Hiking/climbing/biking/other outdoor adventures	31%	29%
Visiting notable architectural sites	35%	27%
Guided tours with access to local experiences that are otherwise inaccessible	36%	26%
Adventure travel (safaris, mountain climbing, trekking vacations, etc.)	30%	26%
Water sports (waterskiing, boating/rafting)	25%	25%
Exploring family's ancestry/past on a heritage vacation	25%	24%
Nightlife	32%	23%
Casino gambling	28%	22%
Attending a concert/music festival	29%	22%
Spa Services (massages, facials, etc.)	NA	21%
Attending performing arts events	21%	21%
Attending a sporting event	20%	20%
Film/art festivals	26%	18%
Playing tennis	18%	18%
Scuba diving	16%	17%
Snow skiing/snowboarding	21%	17%
Playing golf	18%	15%
Surfing	15%	15%

- / Beach experiences, shopping, and historical sites are the top features likely Hawaii visitors look for when selecting a destination.
- / Many activities decreased in interest among likely Hawaii visitors compared to February '21.

Data in bold indicates a significant difference from February 2021.

Base: Likely to Visit Hawaii (n=824)

Source: MMGY Global's 2022 *Portrait of American Travelers*® "Spring 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, visiting friends and family and taking a domestic flight. Two-thirds of these travelers are planning to travel with their significant other while 3 in 10 plan to travel with their children. Compared to Feb '21, significantly more of these travelers plan to take a domestic flight.
- Likely Hawaii Visitors are taking vacations to explore nature, to unplug and to experience different cultures. They're influenced by a destination's beautiful scenery, perceived safety and food and drink scene. On vacation they're most interested in beach experiences, shopping, and visiting historical sites.

Destinations of Interest

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

Top 20 States of Interest	Feb '21	Feb '22
California	68%	74%
Florida	68%	70%
Colorado	65%	66%
Alaska	68%	65%
Arizona	58%	65%
New York	68%	64%
Texas	59%	61%
Washington	58%	61%
Nevada	58%	60%
Georgia	51%	55%
Virginia	42%	54%
Utah	48%	54%
North Carolina	48%	53%
New Mexico	53%	53%
South Carolina	47%	52%
Louisiana	51%	52%
Tennessee	46%	51%
Oregon	51%	50%
New Jersey	48%	49%
Vermont	44%	49%

Destinations of Interest

Base: Likely to Visit Hawaii (n=824)

Data in bold indicates a significant difference from February 2021.

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

Other Than Hawaii Destinations, Likely Hawaii Visitors Are Also Interested in Visiting Las Vegas and New York City

Top 20 Destinations of Interest	Feb '21	Feb '22
Honolulu, HI	73%	75%
Island of Hawai'i	NA	73%
Maui, HI	NA	72%
Las Vegas, NV	67%	70%
Kaua'i, HI	NA	69%
New York City, NY	68%	66%
San Diego, CA	59%	65%
Miami, FL	58%	65%
Florida Keys/Key West, FL	65%	65%
Orlando, FL	57%	64%
Los Angeles, CA	60%	64%
San Francisco, CA	66%	63%
Palm Beach, FL	54%	62%
Tampa, FL	52%	61%
New Orleans, LA	60%	61%
Phoenix/Scottsdale, AZ	56%	61%
Palm Springs, CA	52%	61%
Seattle, WA	63%	61%
Washington, DC	58%	60%
Napa Valley, CA	55%	59%

Destinations of Interest

Base: Likely to Visit Hawaii (n=824)

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

Data in bold indicates a significant difference from February 2021.

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

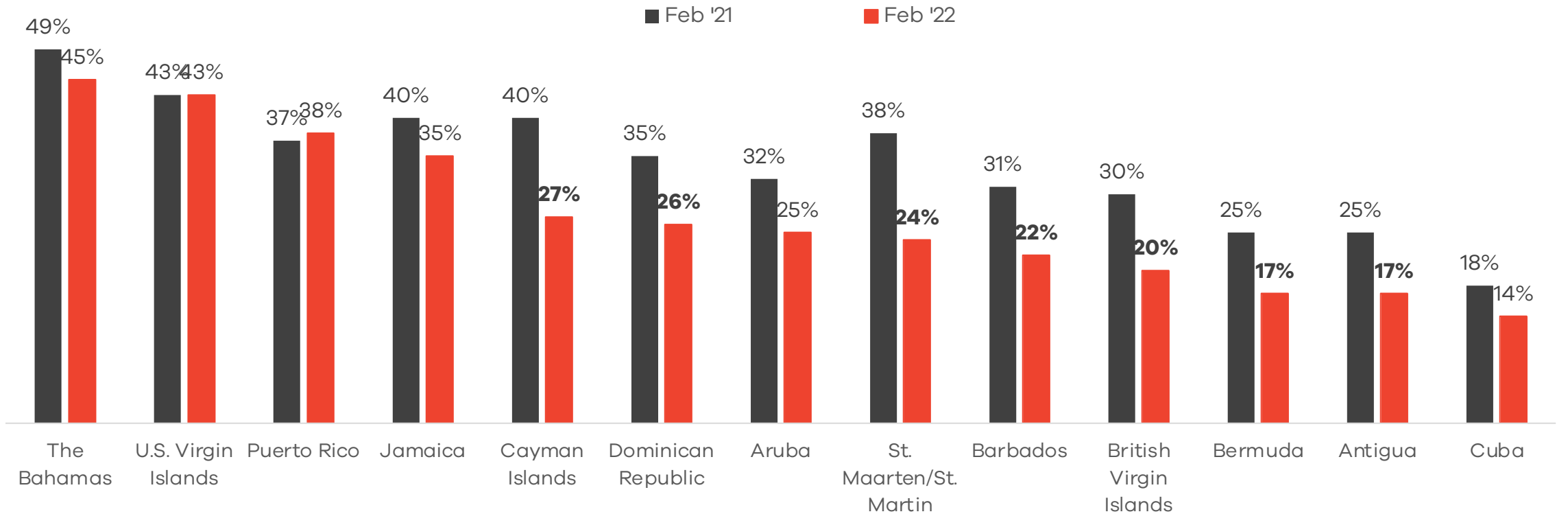
International Destinations of Interest	Feb '21	Feb '22
Europe	45%	38%
Canada	42%	34%
The Caribbean	35%	30%
Mexico	31%	27%
South America	27%	22%
Central America	25%	20%
Asia	25%	16%
Oceania	22%	12%
Middle East	7%	8%
Africa	9%	8%

Data in bold indicates a significant difference from February 2021.

Destinations of Interest

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

Caribbean Destinations of Interest



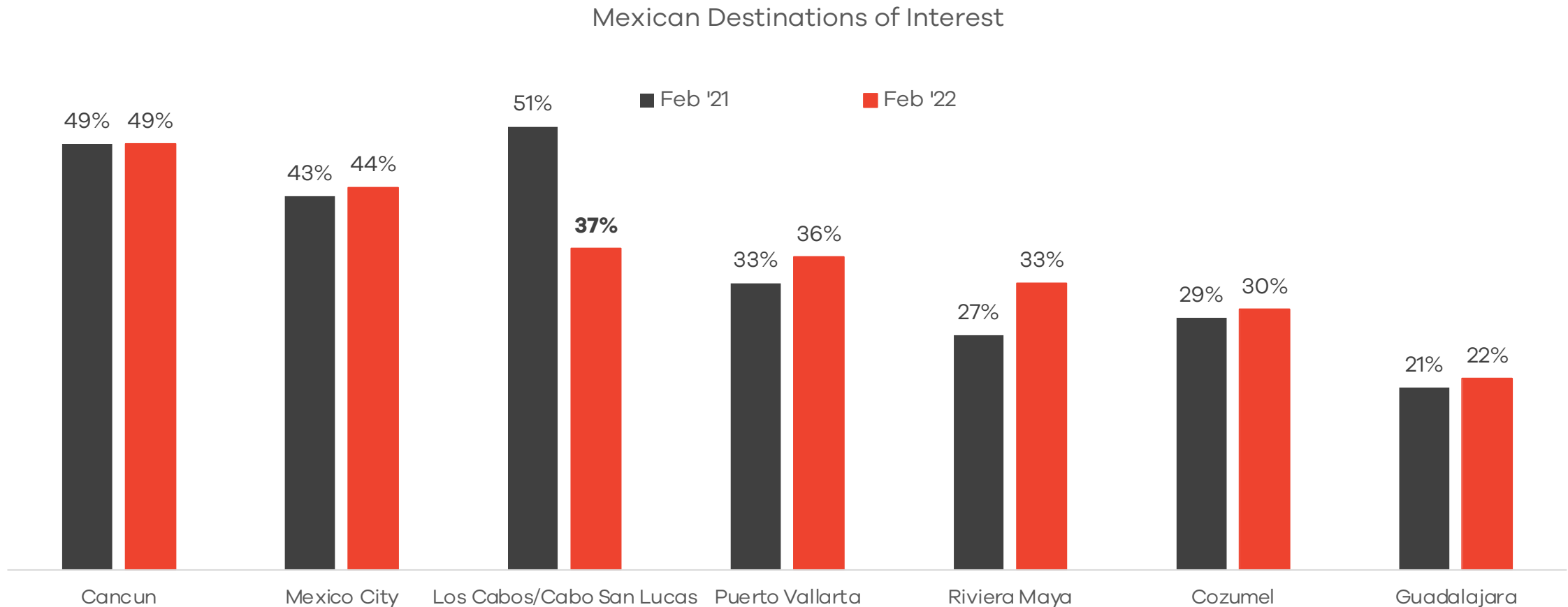
Destinations of Interest

Data in bold indicates a significant difference from February 2021.

Base: Likely to Visit Hawaii & Interested in Visiting The Caribbean (n=245)

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

The Top Mexican Destinations of Interest Are Cancun and Mexico City



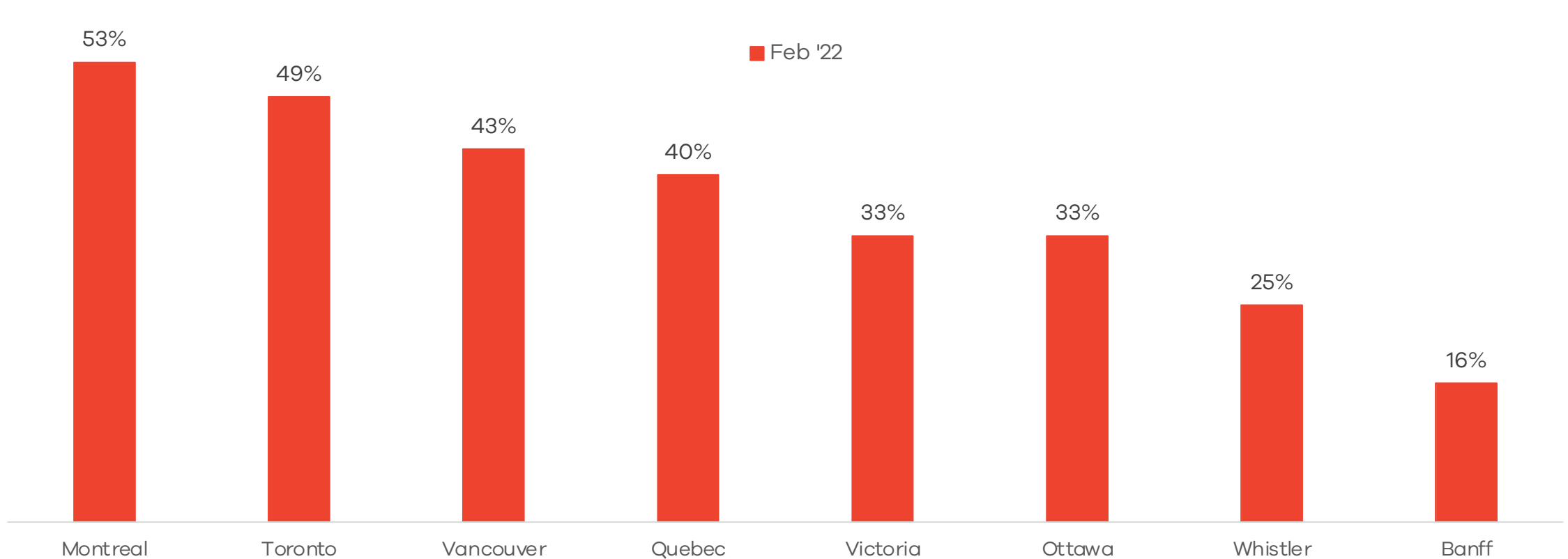
Data in bold indicates a significant difference from February 2021.

Base: Likely to Visit Hawaii & Interested in Visiting Mexico (n=224)

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

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

Canadian Destinations of Interest



Destinations of Interest



THANKYOU

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