

# PORTRAIT OF AMERICAN TRAVELERS®

Winter 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 November 2023.

This report primarily focuses on those *Likely Hawai'i Visitors*, defined as those who intend to take at least one overnight leisure trip during the next 24 months, have traveled by air in the past 18 months, and Likely Hawai'i Visitors (4 or 5 on a 5-point scale). There were a total of 770 Likely Hawai'i Visitors. At the bottom of each slide, the "Base" will detail the audience represented in the data.

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

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

Generation	Age	% of Respondents
Gen Zers	18–24	14%
Millennials	25–40	29%
Gen Xers	41–56	24%
Boomers	57–75	29%
Silent/GI	76+	3%





# Key Insights



# Key Insights

## Hawai'i Tourism Proprietary Questions

- Interest in visiting Hawai'i rose to its highest point in over two years after a sharp decline last wave. Interest remains highest among younger generations, with Gen Z air travelers showing a significant increase in interest from Winter 2022.
- Among those who planned to visit Hawai'i but changed their mind, the most cited reasons for doing so are the costs associated to visit Hawai'i. A quarter of likely Hawai'i visitors are likely to book their trip to Hawai'i within the next two years.
- Four in 10 Air travelers indicate the Maui wildfires impact their likelihood of visiting Hawai'i, with 13% saying they were likely to visit but are no longer likely to visit due to the fires, and 26% that they are still interested in visiting, but may not do so within the next two years.

## Traveler Outlook

- Travel Intentions increased for Likely Hawai'i Visitors from 4.8 to 5.4 average number of vacations expected within the next twelve months. Spending intentions, however, fell from \$6,163 in Winter 2022 to \$5,452 this wave. Travelers could be taking overall less expensive trips, or traveling closer to home.
- Traveler sentiment stands at 138, slightly higher than Winter 2022 (134). Traveler sentiment for interest, affordability and quality of service increased. Concerns surrounding the price of gas, inflationary pressures, , potential disruptions at the airport and COVID-19 decreased significantly, though one-third of Likely Hawai'i Visitors are still extremely impacted by inflationary pressures and the price of gas. We will monitor to see if these concerns continue to decrease over the coming waves.

# Key Insights

## Where People Want to Visit

- Unlike in Wave 3, interest in Hawaiian destinations remained similar to Winter 2022. With some time since the Maui wildfires in August, many travelers seem to have regained their interest in traveling to destinations within the state. Other than Hawaiian destinations, Likely Hawai'i Visitors are most interested in visiting the Florida Keys and Las Vegas.

## Online Travel Agencies

- Ninety-two percent of Likely Hawai'i Visitors use at least one online travel agency (OTA) on a regular basis when researching or booking travel, nearly the same percentage as those who reported doing so in 2022 (88%). Expedia (43%), Hotels.com (38%) and Booking.com (38%) are the most popular sites among Likely Hawai'i Visitors.
- These travelers are most likely to use an OTA to book domestic flights (60%) and accommodations (59%), and they are doing so for the convenience of comparing multiple options (65%) and because they believe these sites offer the best prices (54%).
- Three-quarters of Likely Hawai'i Visitors have concerns about booking with an OTA (75%), including concerns that canceling or re-booking may be more difficult than if they had booked directly with the travel service provider (48%) or that they aren't getting the best available price (39%).

## Brand Loyalty

- Six in 10 Likely Hawai'i Visitors (60%) indicate they consider themselves to be loyal to a hotel brand, similar to last year (61%). Likely Hawai'i Visitors are most likely to consider booking Hilton (55%), Marriott (54%) or Hyatt (44%) within the next two years. Sixty-two percent are active members of at least one hotel loyalty program, with Hilton Honors (62%) and Marriott Bonvoy (50%) displaying the highest popularity. The top influential factors that lead to hotel brand loyalty include consistent level of service as well as overall satisfaction with the brand previously.
- Nearly two-thirds of Likely Hawai'i Visitors (64%) indicate they consider themselves to be loyal to an airline, similar to last year (63%). American Airlines (61%), Delta (55%) and United (48%) garner the most interest among these travelers over the next two years. Two-thirds (65%) are active members of at least one airline frequent flyer program, with Delta SkyMiles (53%) and American Airlines AAdvantage (51%) displaying the highest popularity. The top influential factors that lead to airline loyalty include consistency in level of service, as well as overall satisfaction with previous flight experiences.

# Key Insights

## Social Media

- Social media continues to be an important source of information and inspiration when planning travel. Nine in 10 Likely Hawai'i Visitors have a personal page or profile on social media (93%), with Facebook (67%), Instagram (65%) and YouTube (63%) being the most popular. YouTube and TikTok saw the greatest increase in usage over the past year for Likely Hawai'i Visitors. Among Likely Hawai'i Visitors who are active on social media, 68% have selected a vacation destination or travel service provider based at least partially on information viewed on social media.
- Compared to last year, more Likely Hawai'i Visitors follow a vacation destination on social media (57% in 2023 compared to 51% in 2022). Six in 10 (61%) of Likely Hawai'i Visitors say they follow a celebrity on social media, and 65% say they follow an influencer or content creator. Eight in 10 (84%) of Likely Hawai'i Visitors who follow a content creator perceive the content these influencers share to be authentic representations of the travel destinations.

## Vacation Motivators and Activities

- More than half of Likely Hawai'i Visitors have used ChatGPT or another AI tool for travel planning (56%), primarily to research flight options (52%).
- Beautiful scenery (68%) continues to be the most influential feature when selecting a destination, followed by the food and drink scene (63%) and safety (61%).
- Beach experiences (54%), shopping (50%), visiting a museum (48%), historical sites (47%) and food tours (46%) are the top activities of interest for Likely Hawai'i Visitors.

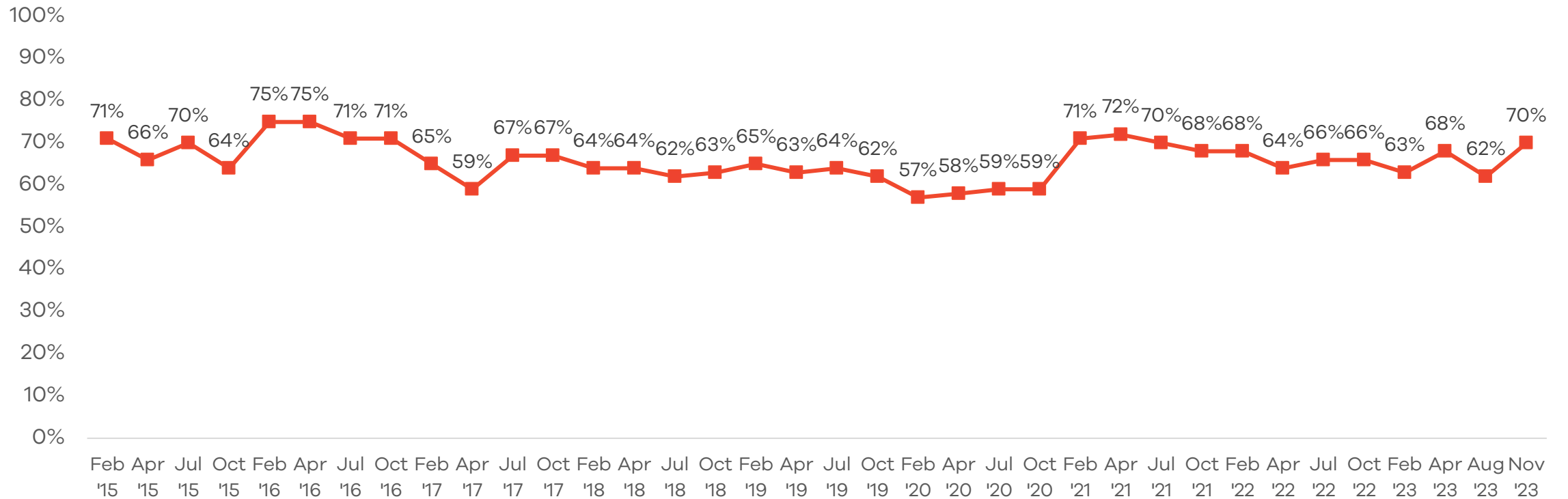


# Hawai'i Tourism Proprietary Questions



# Interest in Visiting Hawai'i Rose Significantly this Wave After a Significant Decrease in Fall.

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



Hawai'i Tourism Proprietary Questions

Base: Air Travelers (n=1,710)

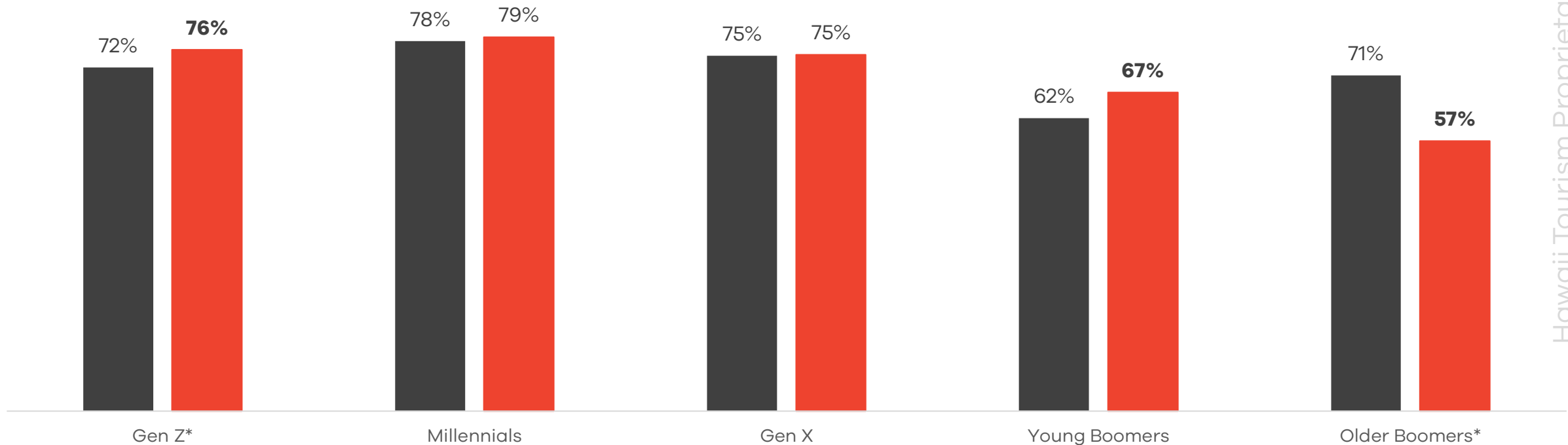
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Winter Edition"



# Interest in Visiting Hawaii Remains High for Younger Generations.

Interest in Visiting Hawaii  
By Generation

■ 2022 ■ 2023



\* Small sample size – Interpret with caution.

Data in bold indicates a significant difference from Winter 2022.

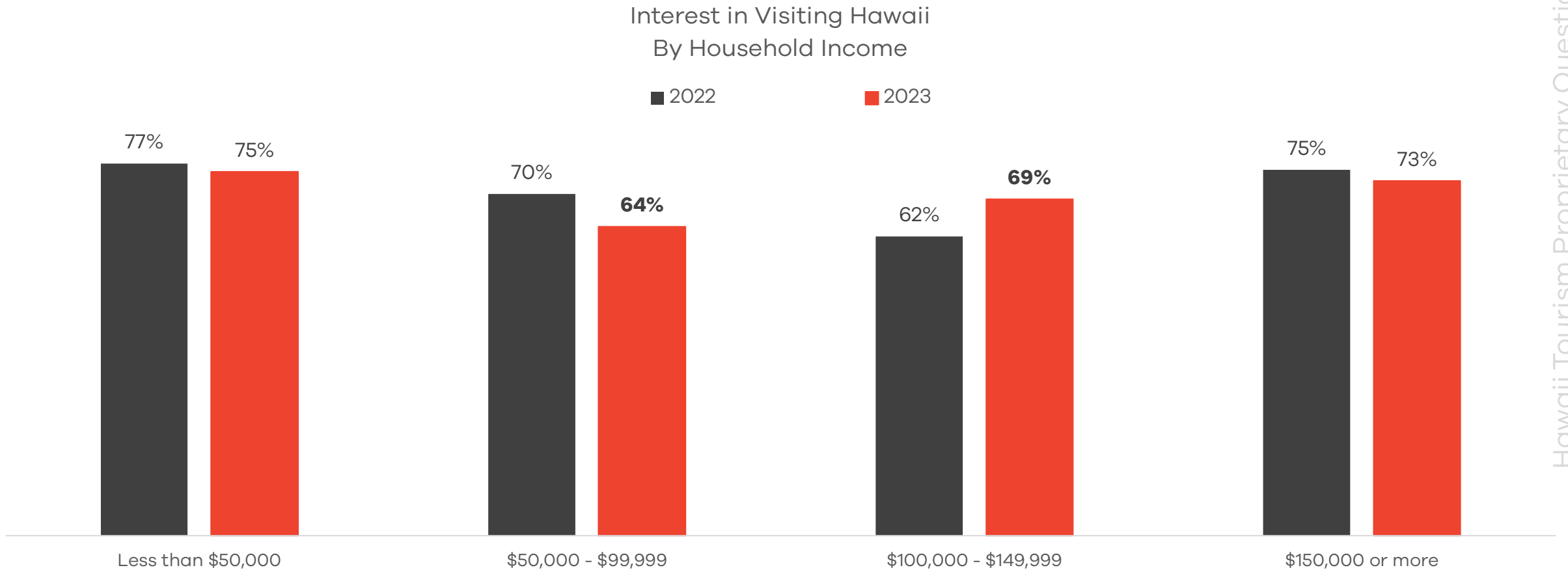
Base: Air Travelers (n=1,710)

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

Hawaii Tourism Proprietary Questions



# Interest in Visiting Hawaii Has Decreased Among Air Travelers With Incomes Between \$50,000-\$99,999.



Data in bold indicates a significant difference from Winter 2022.

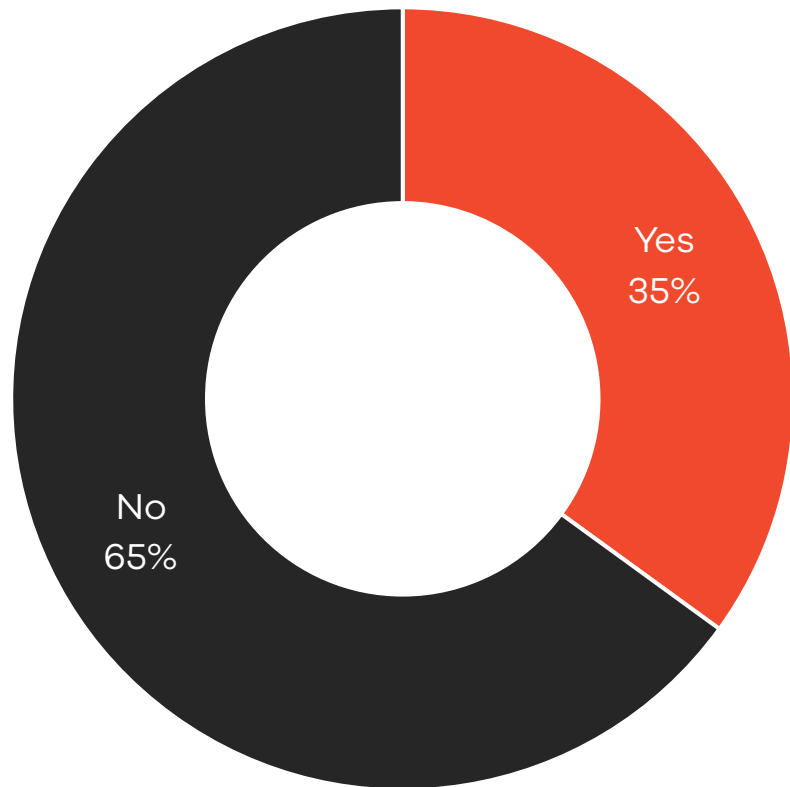
Base: Air Travelers (n=1,710)

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

Hawaii Tourism Proprietary Questions

# The Cost to Visit Hawai'i Continues To Be The Most Cited Deterrent To Visiting.

Considered Visiting Hawai'i But Changed Their Mind



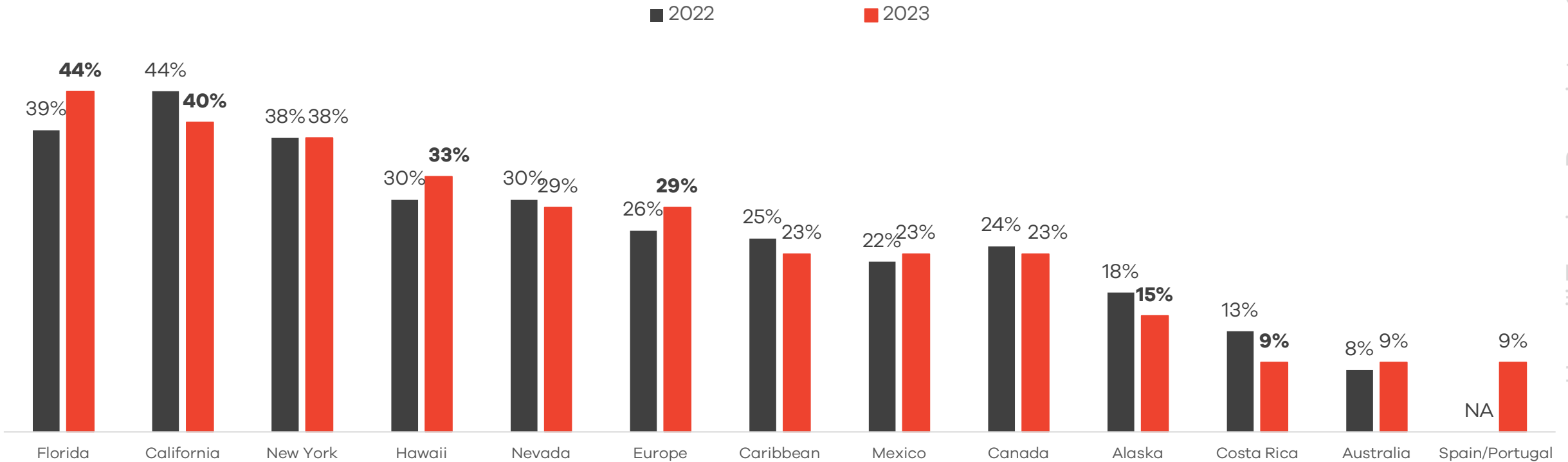
Reasons For Not Visiting Hawai'i – Among Those Who Changed Their Mind	2022	2023
Price of airfare	34%	<b>35%</b>
Price of the hotel	28%	<b>35%</b>
Price of a vacation package	33%	32%
The flight to Hawai'i is too long	20%	22%
Better value at another destination	22%	22%
Concerns about COVID-19 variants	19%	14%
Heard/read that Hawai'i residents don't want visitors	9%	13%
Hurricanes and tropical storms hitting Hawai'i	11%	12%
Not sure which island(s) in Hawai'i to visit	12%	12%
Already been and want to try another destination	10%	11%
Accommodations were not available	10%	11%
Hawai'i is too crowded	9%	10%
Hawai'i is not exotic enough	9%	10%
Not enough time to travel to Hawai'i	13%	9%
Higher quality entertainment at other destinations	NA	9%
Heard rental cars limited/not available	NA	8%
Not enough activities in Hawai'i	8%	9%
Hawai'i is not unique enough	10%	9%
Not enough dining options at price point	NA	7%

Data in bold indicates a significant difference from Winter 2022.

**Base:** Air Travelers (n=1,710) & Travelers Who Changed Their Mind (n=606)  
**Source:** MMGY Global's 2023 *Portrait of American Travelers*® "Winter Edition"

# Past Visitation To Hawai'i Rose Slightly Compared to Winter 2022.

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



Data in bold indicates a significant difference from Winter 2022.

Base: Likely Hawai'i Visitors (n=770)

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

Hawai'i Tourism Proprietary Questions



# A Quarter of Likely Hawai'i Travelers are Likely to Book a Trip to Hawai'i Within the Next 2 Years.

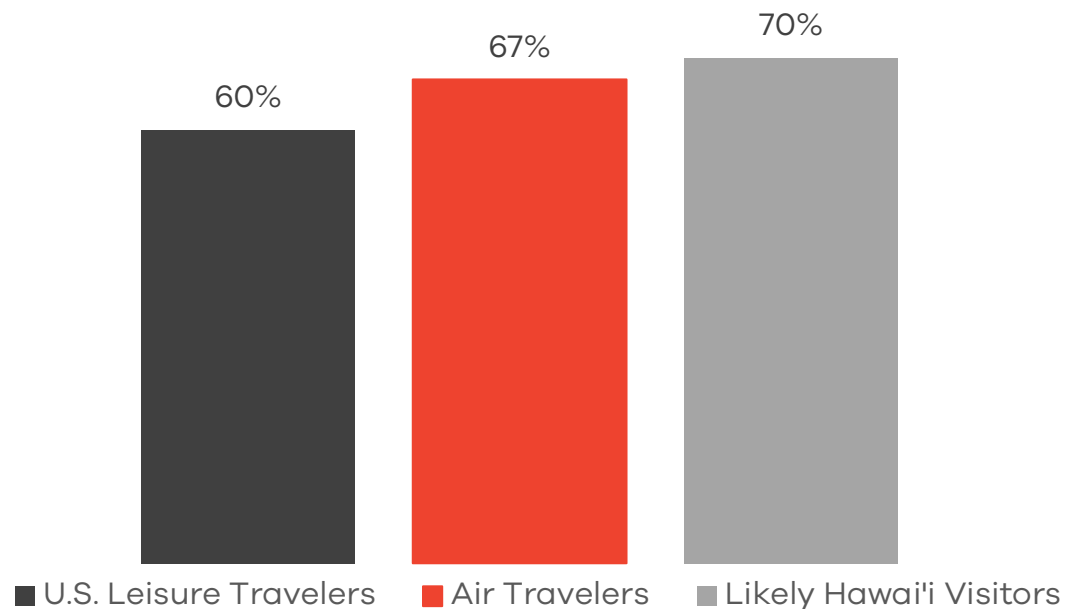
Destinations Most Likely to Book in the Next Two Years	U.S. Leisure Travelers	Air Travelers	Likely Hawai'i Visitors
Hawai'i	13%	13%	25%
Another U.S. state	41%	36%	23%
Caribbean	13%	14%	14%
Europe	12%	16%	17%
Mexico	7%	6%	6%
Asia	5%	7%	9%
Oceania	2%	3%	3%
Other	6%	4%	2%

Hawai'i Tourism Proprietary Questions

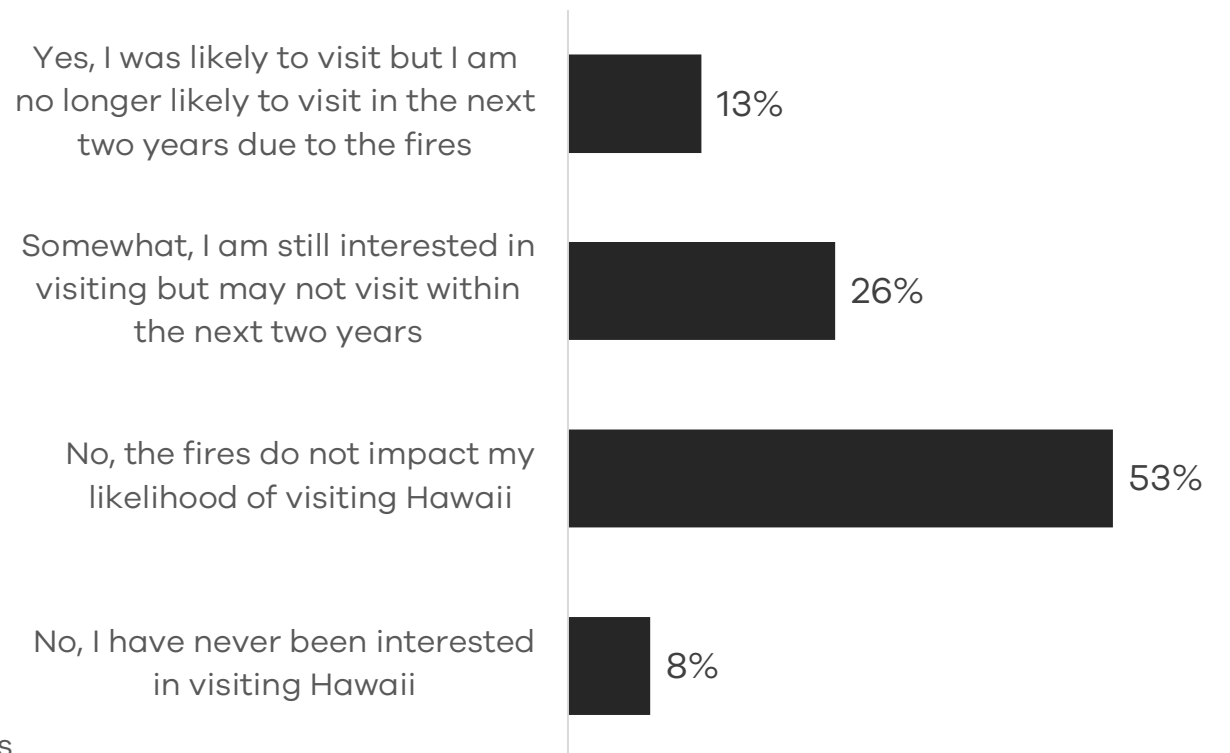
Data in bold indicates a significant difference from U.S. Leisure Travelers  
**Base:** U.S. Leisure Travelers (n=4,501), Air Travelers (n=1,710), Likely Hawai'i Visitors (n=770)  
**Source:** MMGY Global's 2023 *Portrait of American Travelers*® "Winter Edition"

# Four in 10 Air Travelers Say That the Maui Wildfires Will at Least Somewhat Impact Their Likelihood of Visiting Hawai'i Within the Next Two Years.

Awareness of Maui Fires



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



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

**Base:** U.S. Leisure Travelers (n=4,501), Air Travelers (n=1,710), Likely Hawai'i Visitors (n=770)

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



# The Hawai'i Prospect

# Self-Described Personas

	U.S. Leisure Travelers	Likely Hawai'i Visitors
Beach lover	48%	<b>55%</b>
Foodie	41%	<b>46%</b>
Pet lover	42%	42%
Family traveler	37%	<b>41%</b>
Sports fan/enthusiast	29%	<b>36%</b>
Outdoor adventurer	28%	<b>34%</b>
Theme park enthusiast	23%	<b>33%</b>
World traveler	19%	<b>33%</b>
Travel bargain hunter	28%	29%
Cruise lover	21%	<b>29%</b>
Concert/festival enthusiast	23%	<b>28%</b>
Wine enthusiast	18%	<b>27%</b>
Conservative	25%	26%
Moderate	21%	<b>26%</b>
All-inclusive resort enthusiast	20%	<b>26%</b>
Cocktail enthusiast	16%	<b>26%</b>
Video game enthusiast	16%	<b>26%</b>
Luxury traveler	18%	<b>25%</b>
Environmentally-conscious	18%	<b>21%</b>
Liberal	18%	<b>23%</b>
Golf enthusiast	10%	<b>17%</b>
Social justice activist	7%	<b>14%</b>
Ski/snowboard enthusiast	6%	<b>13%</b>
Recreational cannabis user	13%	12%

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

**Base:** U.S. Leisure Travelers (n=4,501), Likely Hawai'i Visitors (n=770)  
**Source:** MMGY Global's 2023 *Portrait of American Travelers*® "Winter Edition"

# Demographics

	U.S. Leisure Travelers	Likely Hawai'i Visitors
Male	48%	<b>59%</b>
Female	51%	<b>40%</b>
Other	1%	1%
Gen Zers	14%	15%
Millennials	29%	<b>38%</b>
Gen Xers	24%	25%
Young Boomers	17%	<b>11%</b>
Older Boomers	12%	<b>8%</b>
Have children under 18 at home	31%	<b>44%</b>
White	73%	<b>68%</b>
Hispanic	17%	<b>20%</b>
African American/Black	13%	14%
Asian	7%	<b>11%</b>
Native American	2%	2%
Pacific Islander	1%	2%
Other	5%	6%

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

**Base:** U.S. Leisure Travelers (n=4,501), Likely Hawai'i Visitors (n=770)  
**Source:** MMGY Global's 2023 *Portrait of American Travelers*® "Winter Edition"



# Demographics

	U.S. Leisure Travelers	Likely Hawai'i Visitors
Under \$30,000	15%	<b>3%</b>
\$30,000–\$49,999	13%	<b>9%</b>
\$50,000–\$74,999	18%	<b>12%</b>
\$75,000–\$99,999	10%	11%
\$100,000–\$124,999	11%	<b>16%</b>
\$125,000–\$149,999	7%	<b>11%</b>
\$150,000–\$249,999	19%	<b>27%</b>
\$250,000–\$499,999	4%	<b>7%</b>
\$500,000 or more	2%	<b>4%</b>
4 years or less of high school	39%	<b>26%</b>
1–3 years of college	26%	<b>22%</b>
4 years of college	22%	<b>30%</b>
Some graduate school	3%	3%
Graduate/professional degree	10%	<b>18%</b>

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

# Demographics

	U.S. Leisure Travelers	Likely Hawai'i Visitors
South	38%	<b>30%</b>
West	24%	<b>37%</b>
Midwest	21%	<b>15%</b>
Northeast	17%	17%
Employed (full or part-time)	55%	<b>72%</b>
Retired	26%	<b>18%</b>
Temporarily unemployed	8%	<b>4%</b>
Homemaker (full-time)	7%	<b>4%</b>
Student	3%	3%
Married/living together	49%	<b>58%</b>
Never married	25%	24%
Divorced/separated/widowed	17%	<b>10%</b>

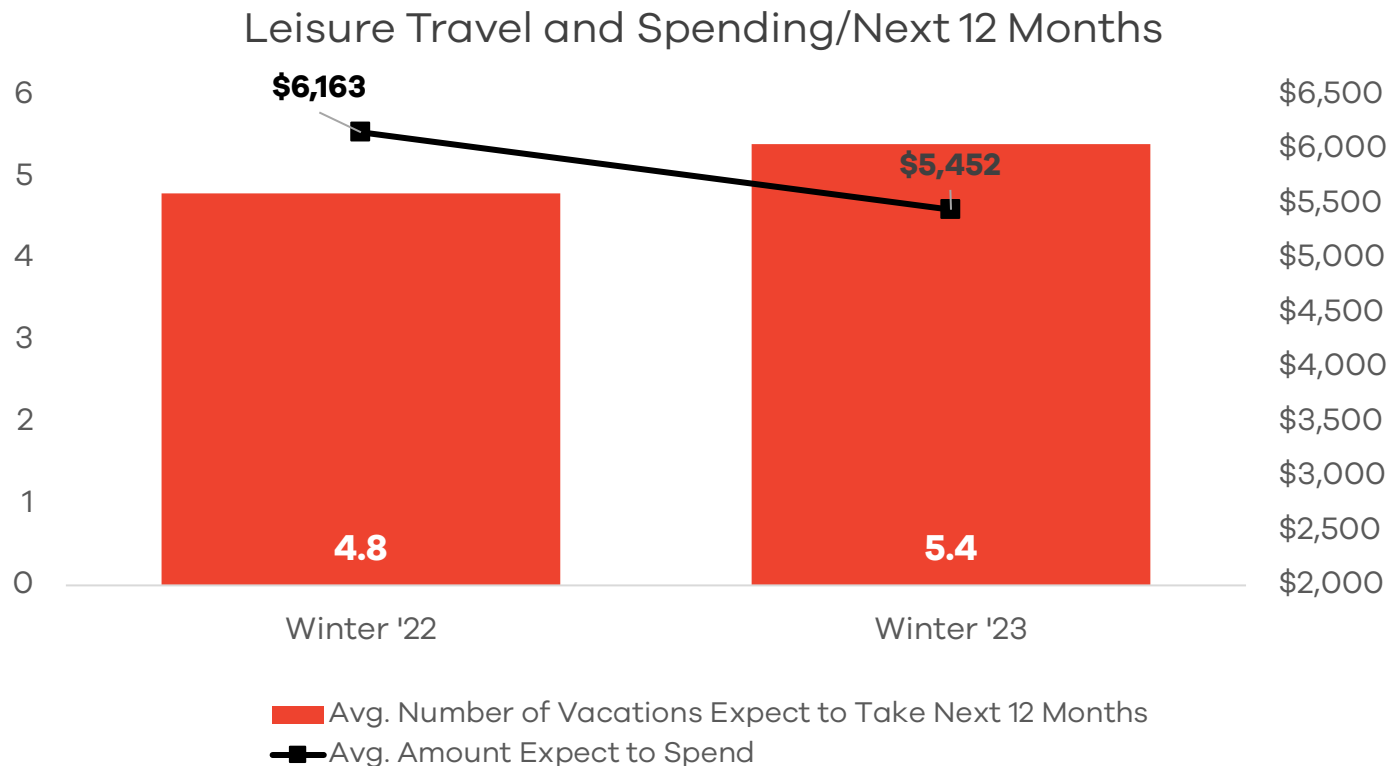
Data in bold indicates a significant difference from U.S. Leisure Travelers





# Travel Outlook Snapshot

# Travel Intentions are up but Spending Decreased.



While travel intentions are up significantly from Winter 2022, spending intentions are down. This could be due to travelers taking less expensive trips or traveling closer to home.

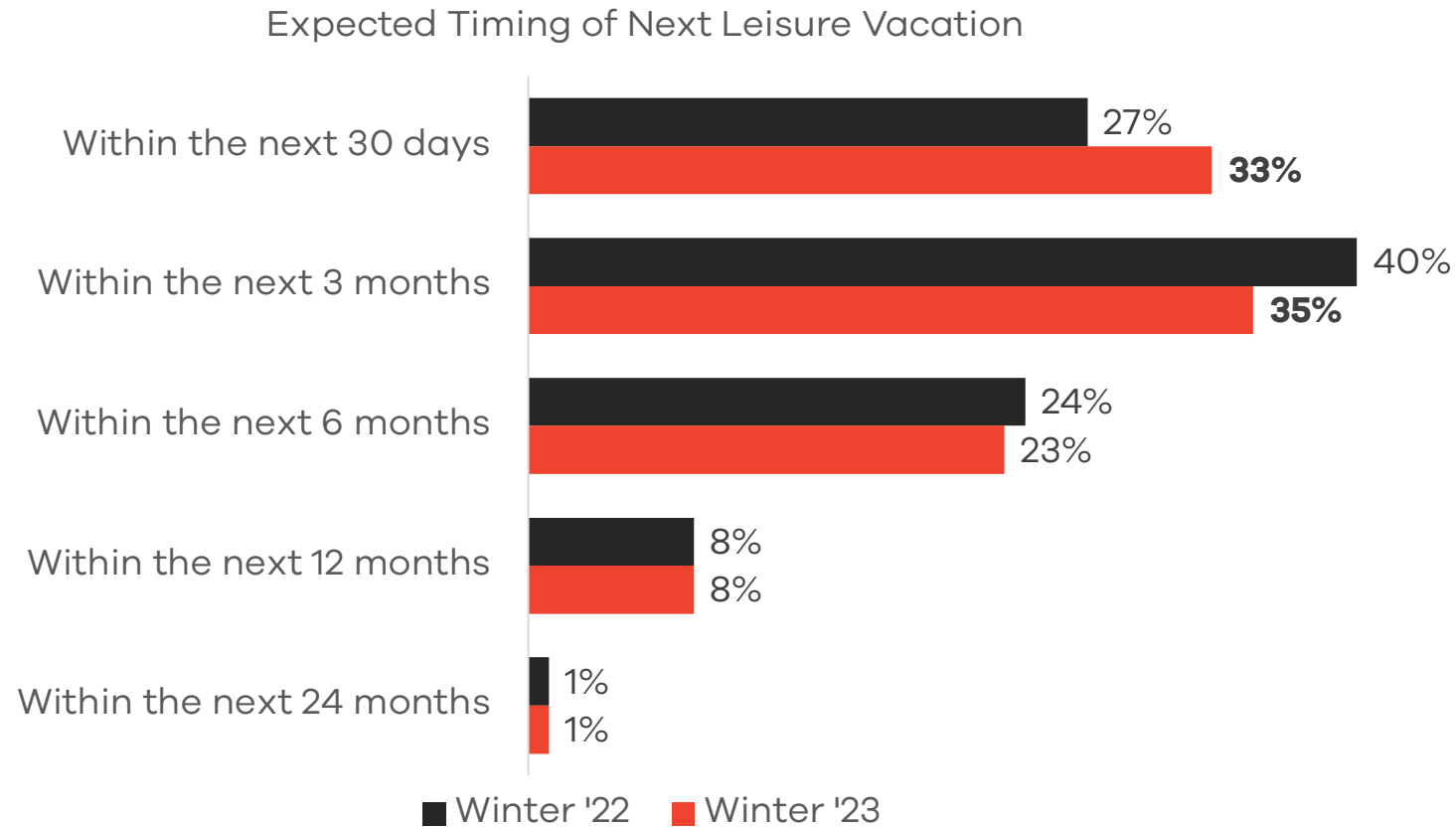
Traveler Intentions: Over Time

Base: Likely Hawai'i Visitors & Planning to Take a Trip in the Next 12 Months (n=760)

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



# Travel Intentions Are Similar To Winter 2022.



Traveler Intentions: Over Time

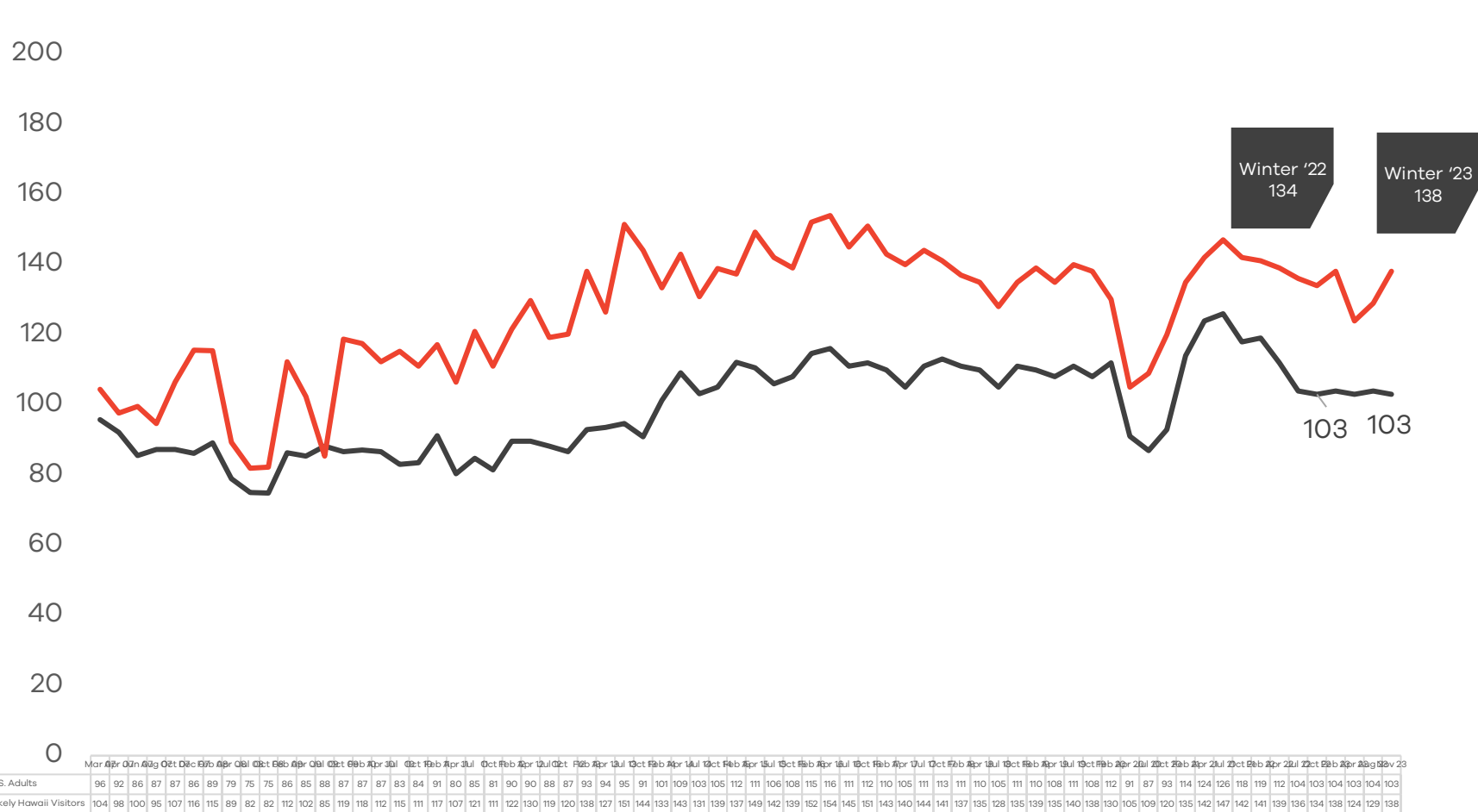
Data in bold indicates a significant difference from Winter 2022.

Base: Likely Hawai'i Visitors (n=770)

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



# Overall Traveler Sentiment Score: Up Significantly from Fall 2022.



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.

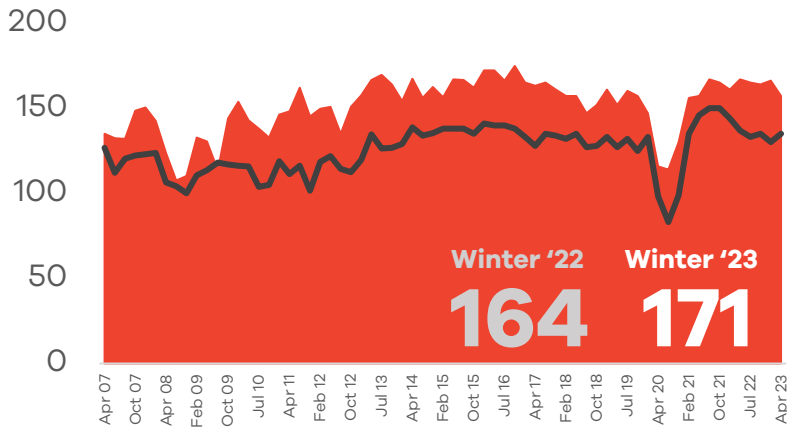
Traveler Sentiment Index™

**Base:** U.S. Adults (n=4,501) & Likely Hawai'i Visitors (n=770)  
**Source:** MMGY Global's 2023 *Portrait of American Travelers* "Winter Edition"

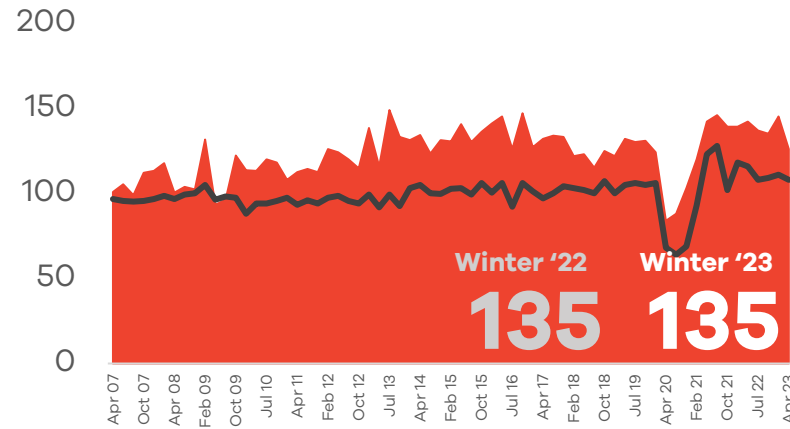


# Compared to Winter 2022, Traveler Sentiment for Quality of Service, Affordability and Interest Increased Significantly.

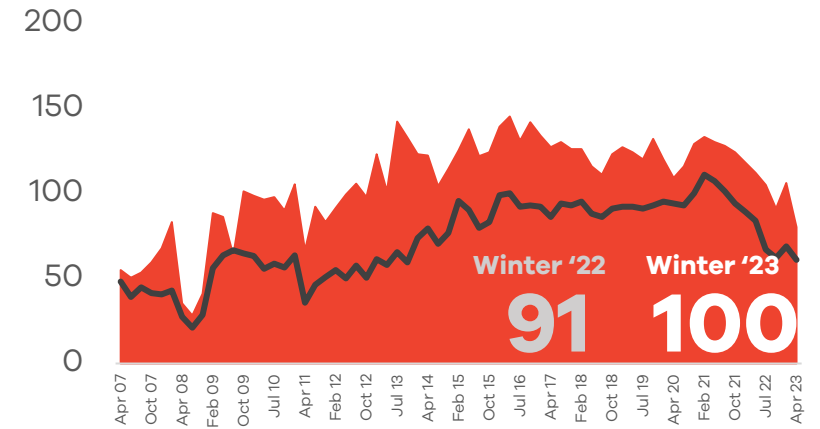
## Interest in Travel



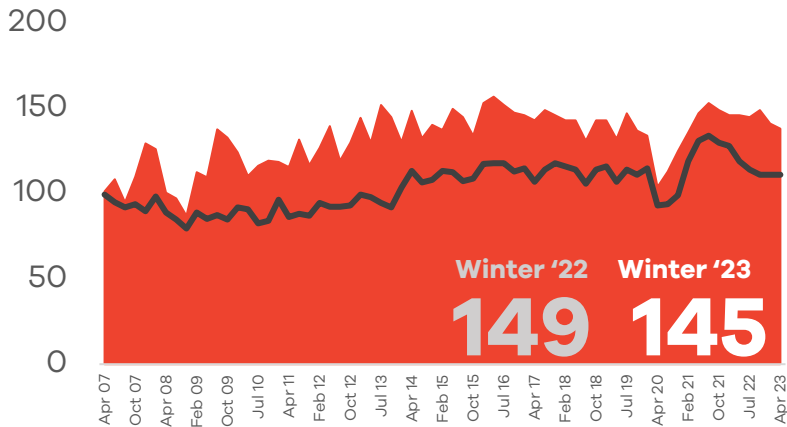
## Perceived Safety of Travel



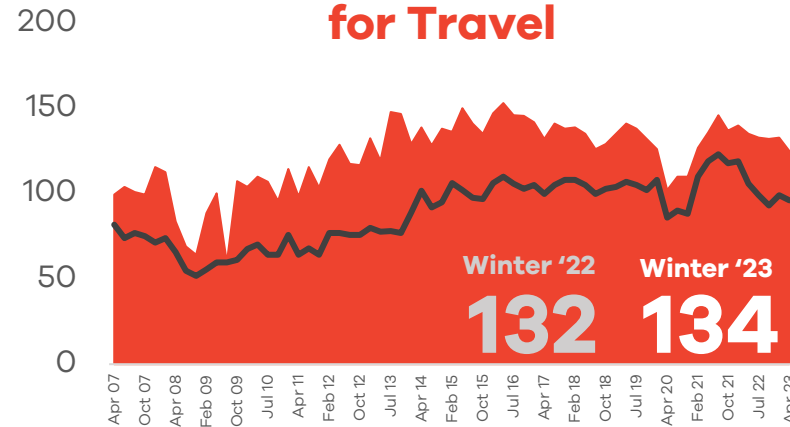
## Affordability of Travel



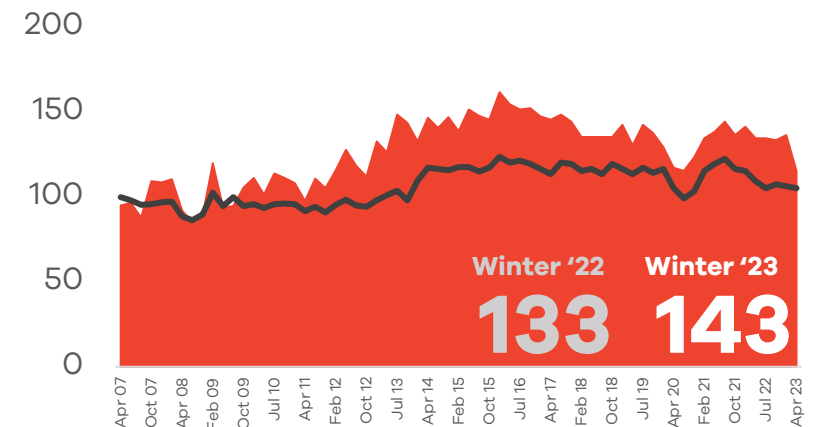
## Time Available for Travel



## Personal Finances Available for Travel



## Quality of Service of Travel



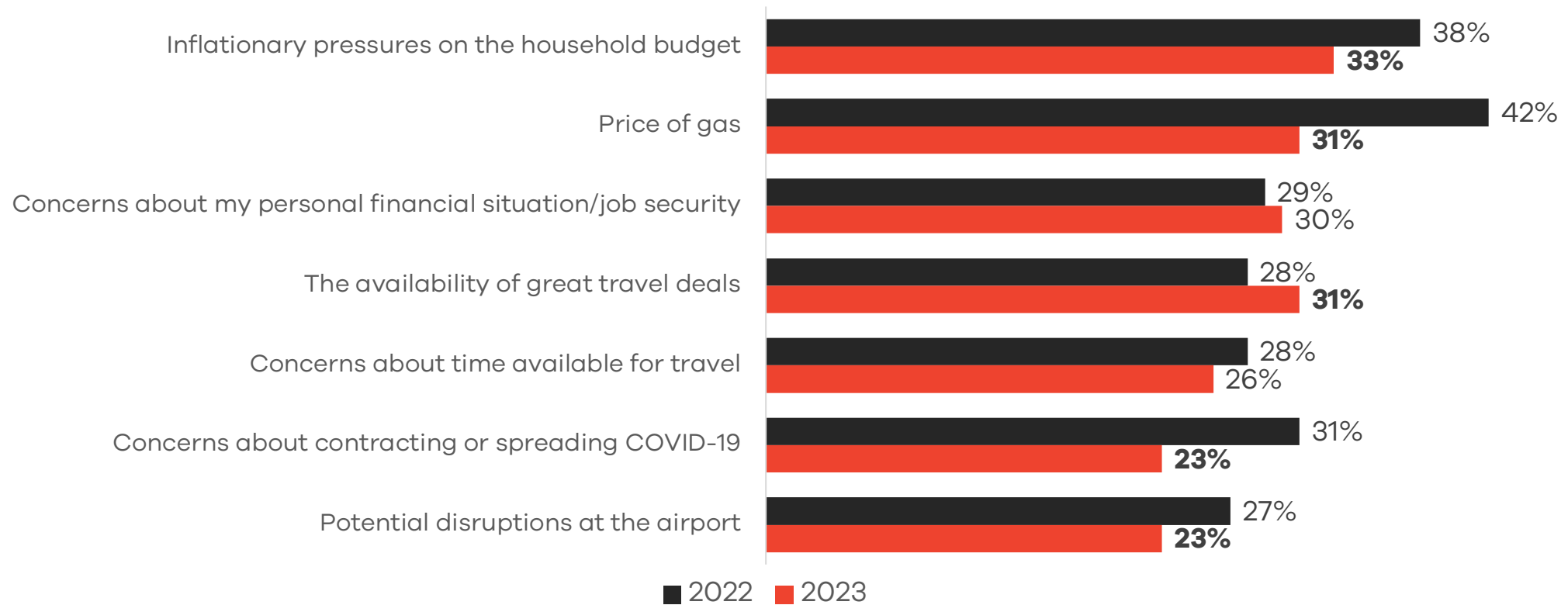
Traveler Sentiment Index™

Base: U.S. Adults (n=4,501) (Black line) & Likely Hawai'i Visitors (n=770) (Red fill)

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

# Significantly Fewer Likely Hawai'i Visitors Are Concerned About the Price of Gas Compared to Winter 2022.

% Who Are Extremely Impacted By...



Barriers To Travel

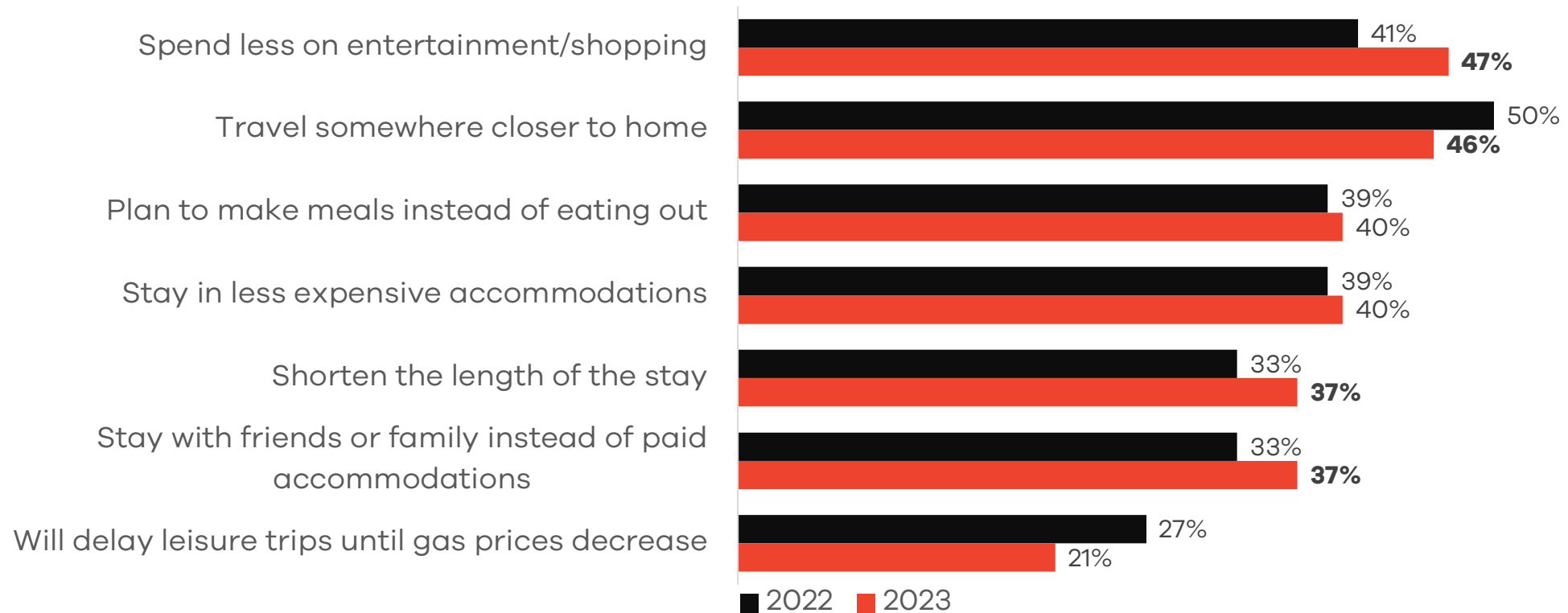
Data in bold indicates a significant difference from Winter 2022.

Base: Likely Hawai'i Visitors (n=770)

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

# Likely Hawai'i Visitors Impacted By Gas Prices Say They Will Spend Less On Entertainment/Shopping and Plan to Travel Somewhere Closer to Home.

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



Barriers To Travel

Data in bold indicates a significant difference from Winter 2022.

**Base:** At least somewhat impacted by the price of gas & Likely Hawai'i Visitors (n=564)

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





# Where People Want to Visit

# Florida, Colorado, Alaska and California Are The Other Top States of Interest Among Likely Hawai'i Visitors.

Top 20 States of Interest	2022	2023
Florida	70%	73%
Colorado	68%	71%
Alaska	67%	70%
California	71%	69%
New York	66%	<b>61%</b>
Nevada	56%	<b>61%</b>
Texas	57%	58%
Arizona	57%	57%
Georgia	48%	50%
Washington	60%	<b>50%</b>
Maine	47%	47%
North Carolina	47%	45%
Montana	48%	<b>45%</b>
South Carolina	45%	44%
Massachusetts	48%	<b>44%</b>
Oregon	48%	<b>44%</b>
Tennessee	49%	<b>43%</b>
Louisiana	45%	<b>42%</b>
Connecticut	42%	42%
Wyoming	45%	<b>41%</b>

Destinations of Interest

Base: Likely Hawai'i Visitors (n=770)

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

Data in bold indicates a significant difference from Winter 2022.



# Other Than Hawai'i Destinations, Likely Hawai'i Visitors Are Also Interested in Visiting the Florida Keys and Las Vegas.

Top 20 Destinations of Interest	2022	2023
Maui, HI	77%	<b>81%</b>
Island of Hawai'i	79%	78%
Honolulu, HI	77%	77%
Kaua'i, HI	76%	75%
Florida Keys/Key West, FL	64%	<b>70%</b>
Las Vegas, NV	64%	<b>70%</b>
Lanai, HI	NA	69%
Miami, FL	59%	<b>63%</b>
Palm Beach, FL	56%	<b>63%</b>
New York City, NY	67%	<b>62%</b>
Orlando, FL	60%	62%
San Diego, CA	66%	<b>62%</b>
Palm Springs, CA	56%	<b>60%</b>
Fort Lauderdale, FL	51%	<b>59%</b>
Niagara Falls, NY	61%	59%
San Francisco, CA	65%	<b>59%</b>
Tampa/St. Petersburg/Clearwater, FL	47%	<b>59%</b>
Los Angeles, CA	61%	<b>58%</b>
Napa Valley, CA	59%	58%
Denver, CO	57%	57%

Destinations of Interest

Base: Likely Hawai'i Visitors (n=770)

Data in bold indicates a significant difference from Winter 2022.

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

# Significantly More Likely Hawai'i Visitors are Also Interested in Visiting Canada, Asia, Southern America, Oceania and Africa Than Did so Last Year.

International Destinations of Interest	2022	2023
Europe	51%	53%
Canada	37%	<b>41%</b>
The Caribbean	40%	38%
Mexico	36%	36%
Asia	21%	<b>26%</b>
South America	22%	<b>26%</b>
Central America	21%	22%
Oceania	18%	<b>22%</b>
Africa	11%	<b>14%</b>
Middle East	10%	11%

Data in bold indicates a significant difference from Winter 2022.

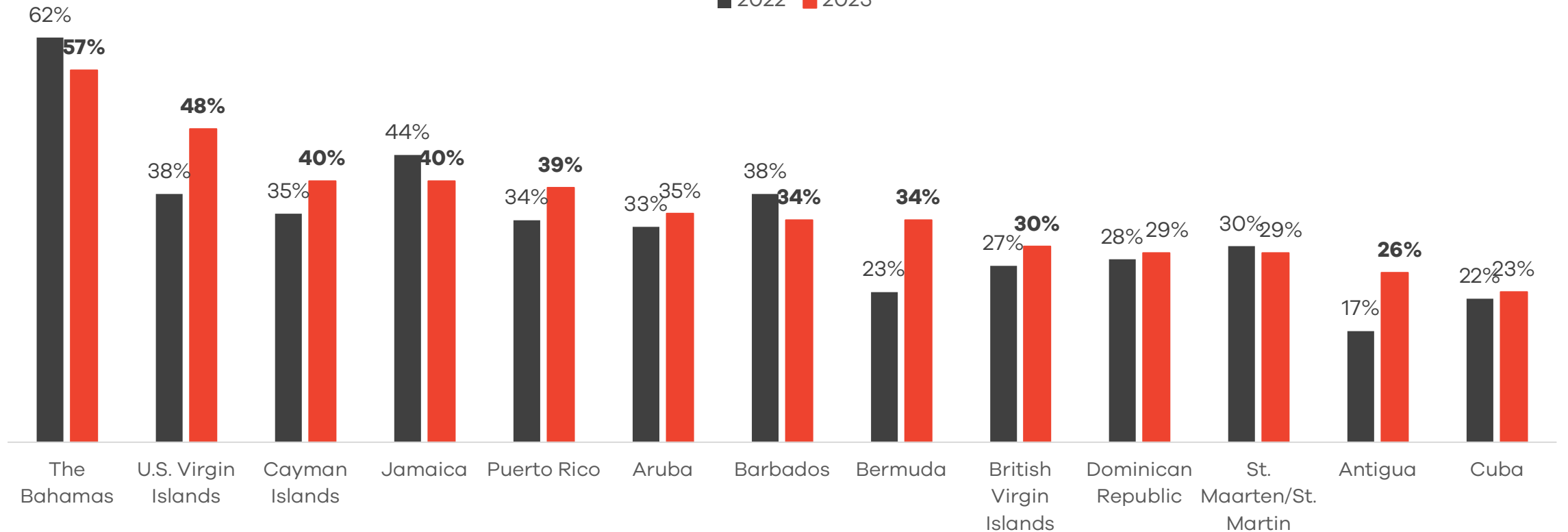
Destinations of Interest



# Interest in Visiting the U.S. Virgin Islands, the Cayman Islands, Puerto Rico and Bermuda Rose Significantly From Winter 2022.

Caribbean Destinations of Interest

■ 2022 ■ 2023



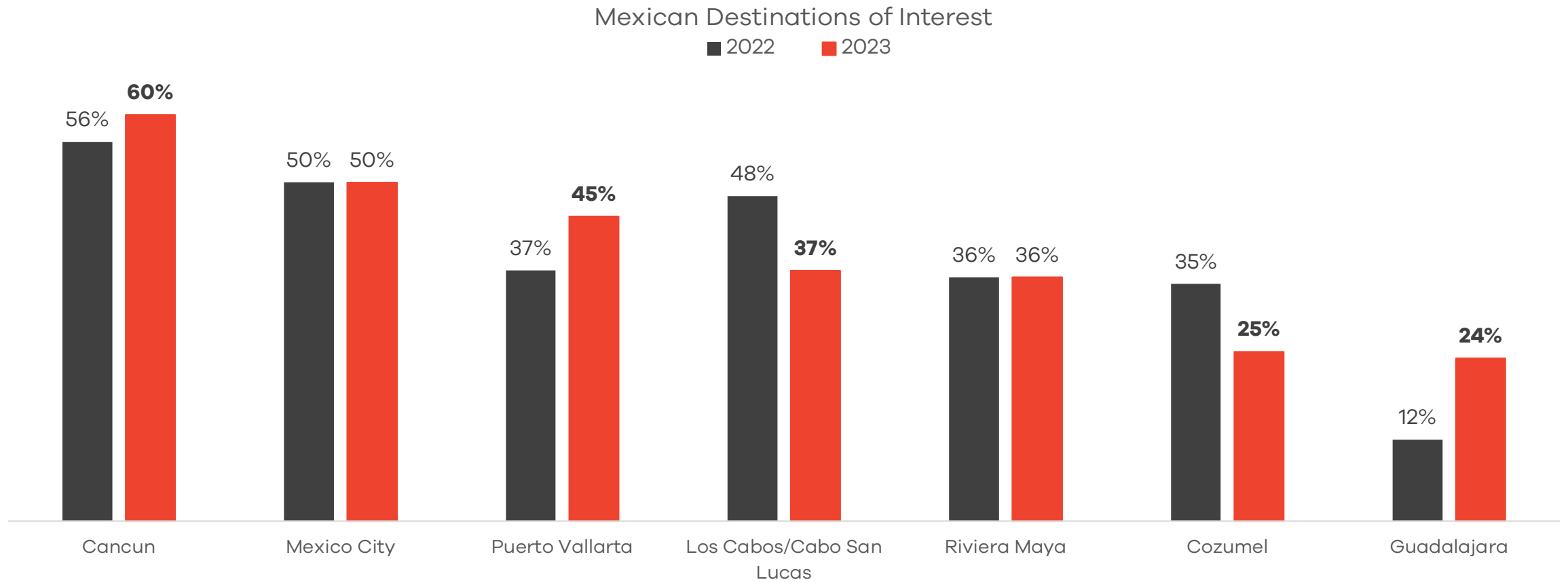
Destinations of Interest

Data in bold indicates a significant difference from Winter 2022.

Base: Likely Hawai'i Visitors & Interested in Visiting The Caribbean (n=291)

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

# Interest in Visiting Cancun, Puerto Vallarta and Guadalajara Increased for Likely Hawai'i Visitors Compared to Winter 202.

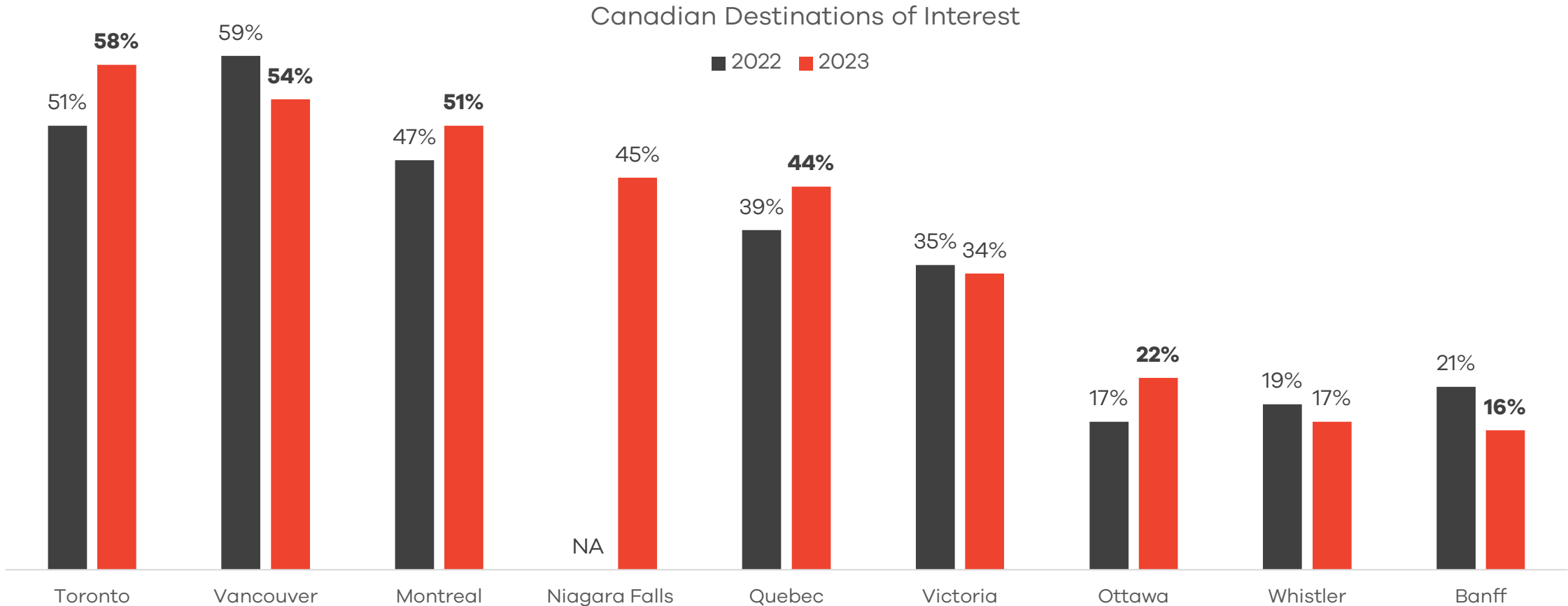


Data in bold indicates a significant difference from Winter 2022.

**Base:** Likely Hawai'i Visitors & Interested in Visiting Mexico (n=274)

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

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



Data in bold indicates a significant difference from Winter 2022.

**Base:** Likely Hawai'i Visitors & Interested in Visiting Canada (n=315)

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

*Winter Module*

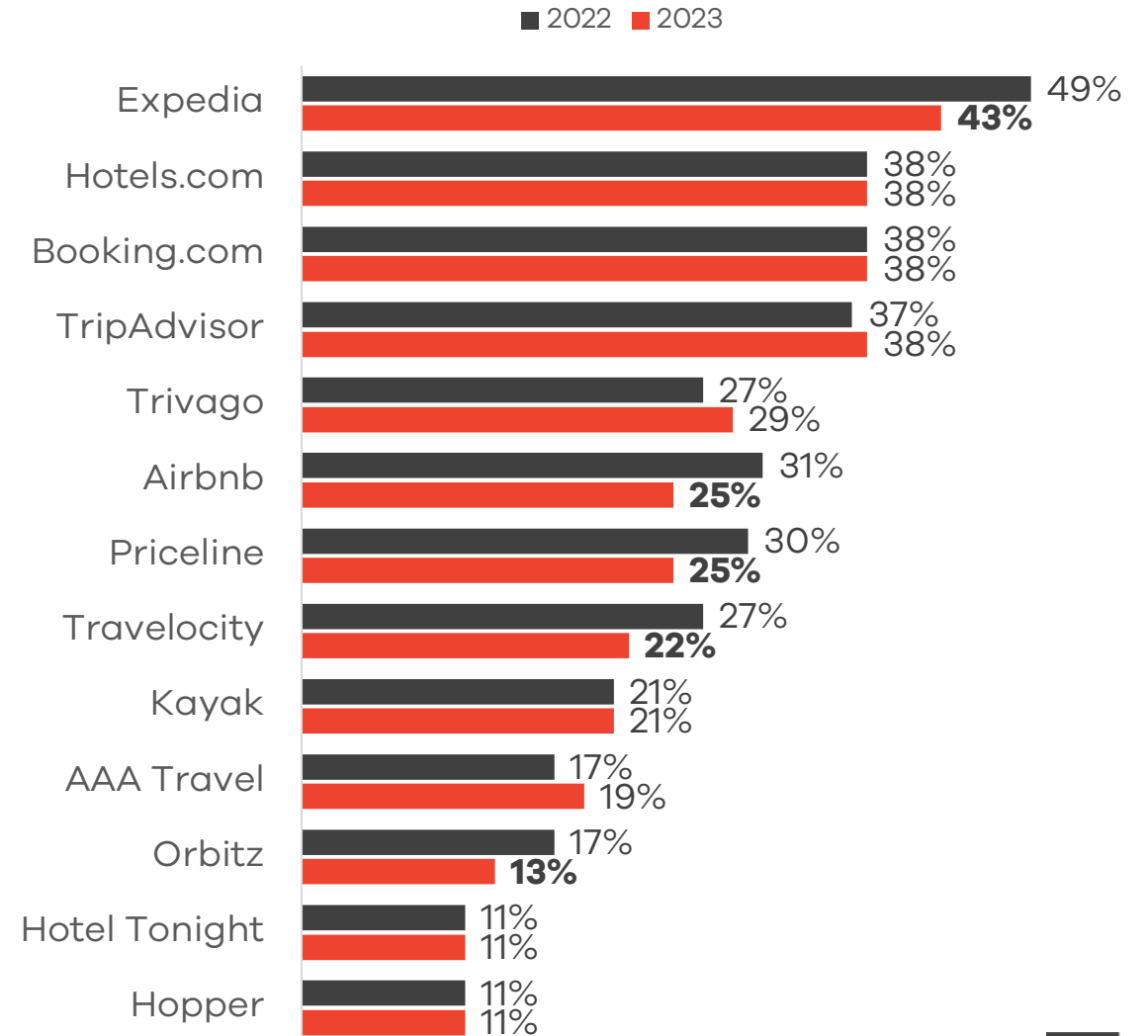
# Online Travel Agencies

# Online Travel Agency Usage

88% 2022      92% 2023

of Likely Hawai'i Visitors visit at least one OTA website or app on a regular basis when researching or booking travel.

OTAs Visited When Researching or Booking Travel



Data in bold indicates a statistically significant difference from 2022.

Base: Likely Hawai'i Visitors (n=770)

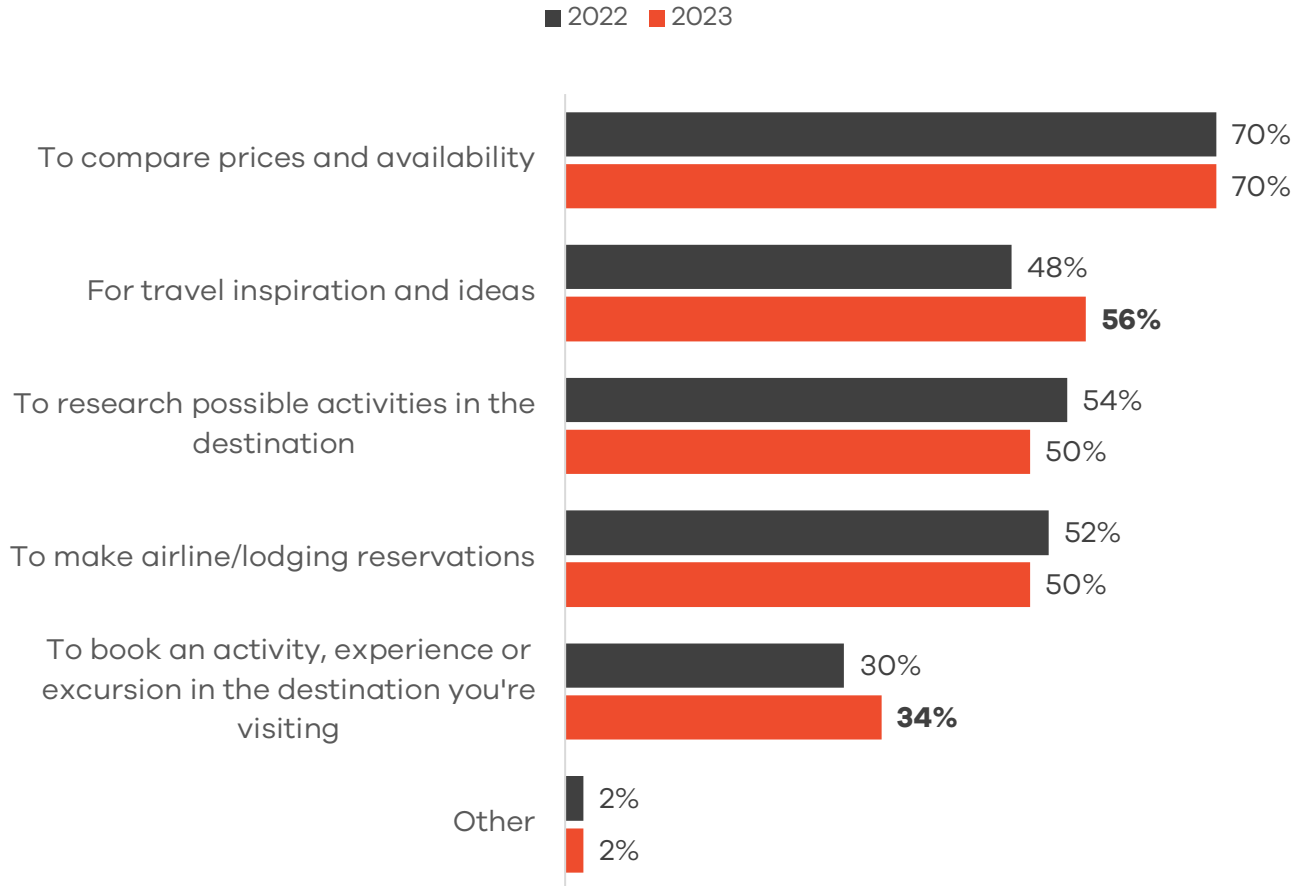
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Winter Edition"





# Likely Hawai'i Visitors Are Predominantly Using OTAs to Compare Prices and Availability.

Reasons to Visit an Online Travel Agency Website/App

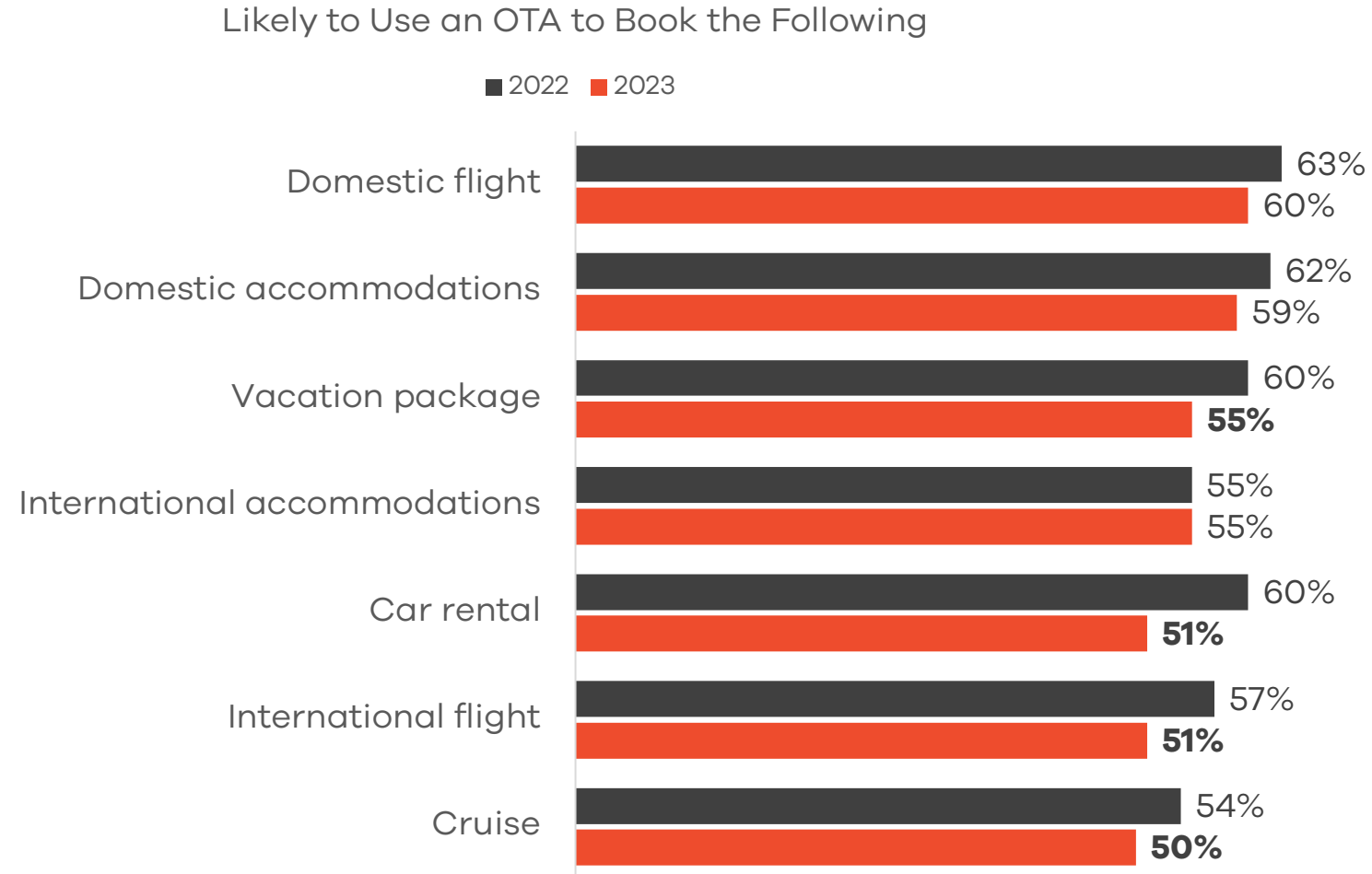


Data in bold indicates a statistically significant difference from 2022.

**Base:** Likely Hawai'i Visitors who use OTAs (n=709)

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

# OTA Users Are Most Likely to Use OTAs to Book Domestic Accommodations, Domestic Flights and Vacation Packages.



Data in bold indicates a statistically significant difference from 2022.

Base: Likely Hawai'i Visitors who use OTAs (n=709)

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

# Reasons for Booking Using an OTA

	2022	2023
Convenience of being able to compare multiple options	62%	65%
These sites/apps are where I can get the best price	50%	<b>54%</b>
These sites/apps are just the first place I think to go when planning travel	38%	<b>45%</b>
These sites/apps are most familiar to me because of their advertising campaigns	32%	<b>41%</b>
I prefer the user experience of these sites/apps over other planning or booking sites	34%	<b>37%</b>
I get loyalty member perks for booking through these sites/apps	33%	35%
Other	2%	1%

**Base:** Likely Hawai'i Visitors who are likely to book using an OTA (n=709)

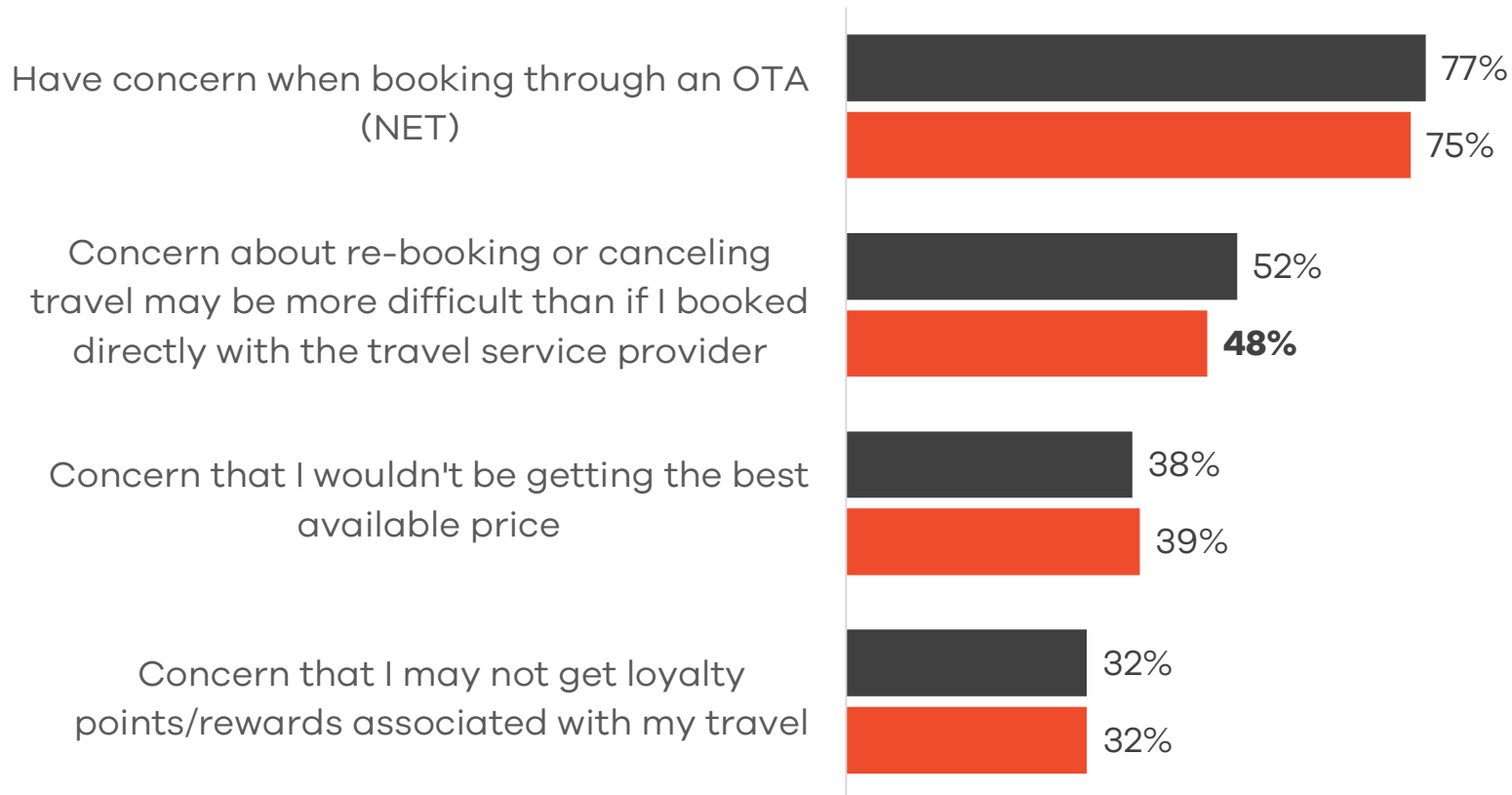
**Source:** MMGY Global's 2023 *Portrait of American Travelers*® "Winter Edition"



# Three-quarters of Likely Hawai'i Visitors Have At Least One of the Following Concerns When Booking With an OTA.

Concerns When Booking With an OTA

■ 2022 ■ 2023



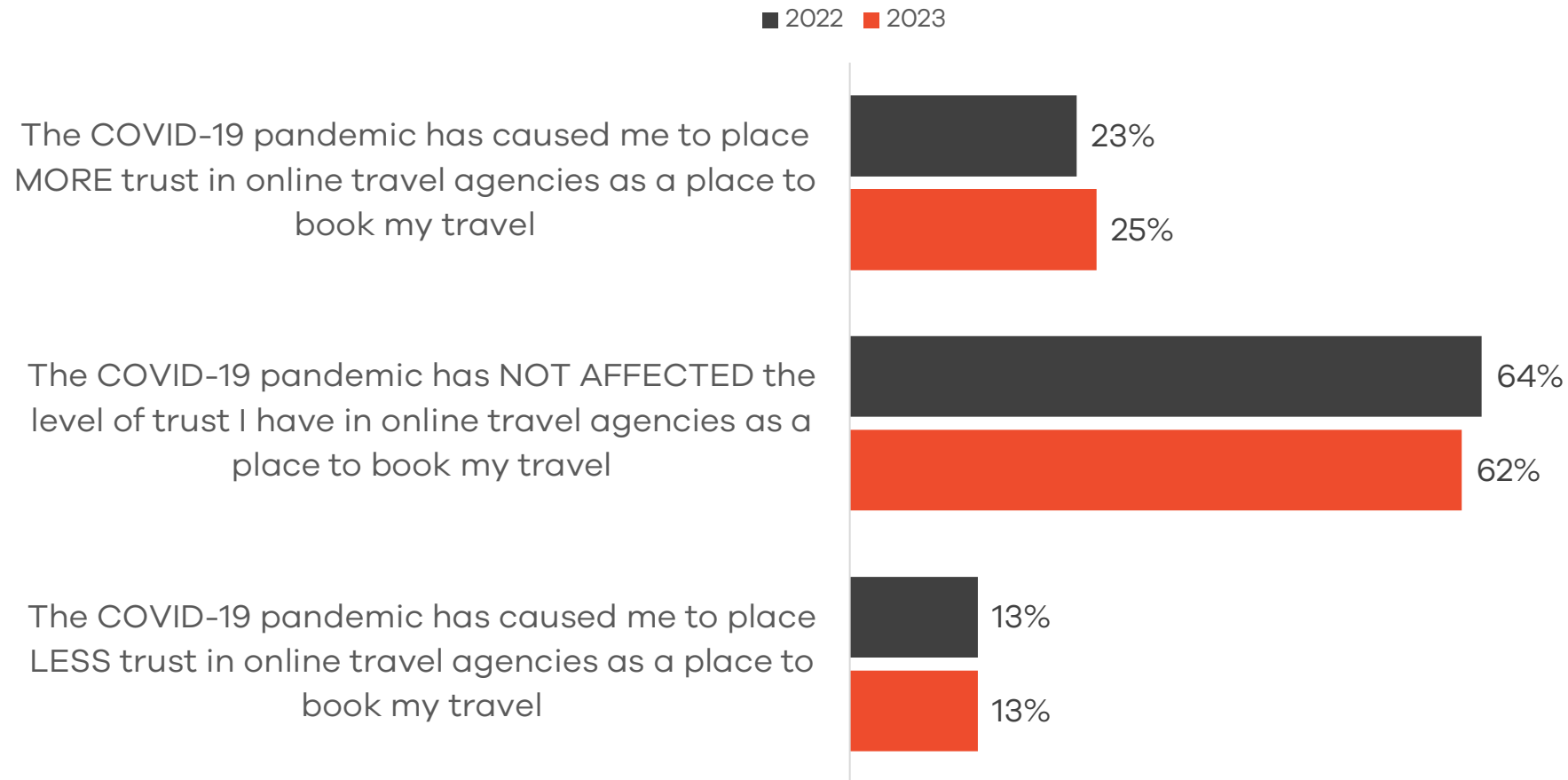
/ Compared to last year, a similar percentage of Likely Hawai'i Visitors have concerns when booking through an OTA.

Base: Likely Hawai'i Visitors (n=770)

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

# The Majority of Travelers Indicate Their Level of Trust in OTAs Has Not Been Affected by the Pandemic.

Impact of COVID-19 on Trusting OTAs



Data in bold indicates a statistically significant difference from 2022.

Base: Likely Hawai'i Visitors (n=770)

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



An aerial photograph of a coastal city, likely Honolulu, Hawaii. The foreground shows a dark sand beach with some people and umbrellas. In the middle ground, there are several large, multi-story buildings, including a prominent pinkish-orange building with a central tower. The background is dominated by lush green mountains under a cloudy sky. The text 'Winter Module' is overlaid in the top right corner in a white, italicized serif font.

*Winter Module*

**Brand Loyalty**

# Hilton, Marriott and Hyatt Are the Most Popular Hotel Brands Among Likely Hawai'i Visitors.

Hotels Would Consider Booking Within Next Two Years	2023
Hilton	55%
Marriott	54%
Hyatt	44%
Holiday Inn	42%
Hilton Garden Inn	39%
Hampton	30%
Sheraton	28%
Wyndham	27%
Disney Hotels and Resorts	27%
Doubletree	25%
Best Western	25%
Radisson	24%
Comfort Inn	23%
Ritz Carlton	22%
Fairfield Inn	21%
Four Seasons	21%
Red Lion Hotels	13%
Gaylord Hotels	8%

Question was changed to ask about consideration in next two years so comparisons to 2022 cannot be made.

**Base:** Likely Hawai'i Visitors (n=770)

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

# American Airlines, Delta and United Are the Most Popular Airline Brands Among Likely Hawai'i Visitors.

Airlines Would Consider Booking Within Next Two Years	2023
American Airlines	61%
Delta	55%
United	48%
Southwest	44%
JetBlue	30%
Alaska Airlines	26%
British Airways	22%
Air Canada	18%
Frontier Airlines	16%
Spirit Airlines	16%
Virgin Atlantic	15%
Lufthansa	12%

Question was changed to ask about consideration in next two years so comparisons to 2022 cannot be made.

**Base:** Likely Hawai'i Visitors (n=770)

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



**% Agree: I Consider Myself to Be Loyal to ...**

**60%**

**A Hotel Brand  
(Compared to 61% in 2022)**

**64%**

**An Airline  
(Compared to 63% in 2022)**

**48%**

**A Cruise Line  
(Compared to 50% in 2022)**

**48%**

**A Car Rental Brand  
(Compared to 46% in 2022)**

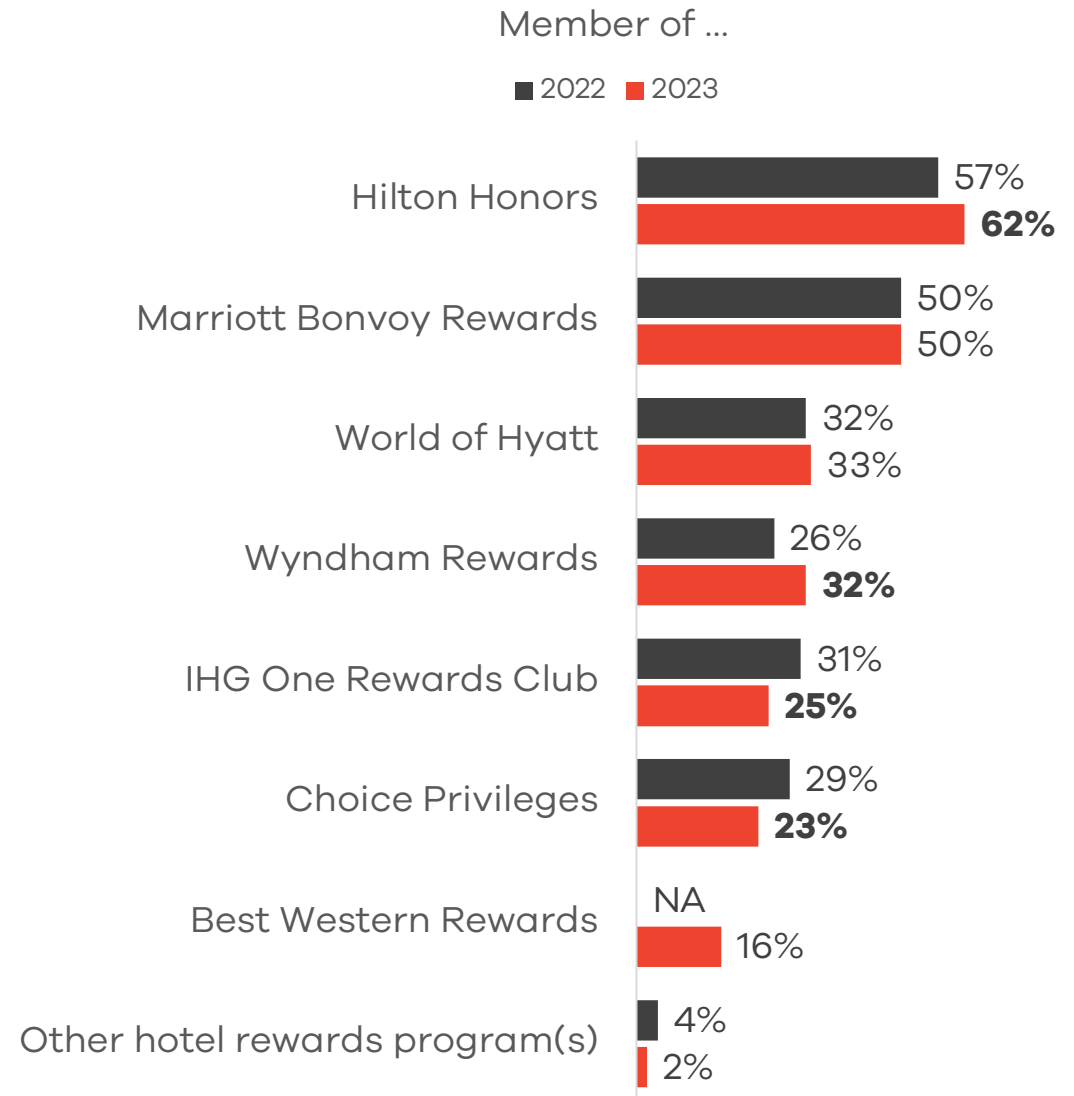
**Base:** Likely Hawai'i Visitors (n=770)

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

# Hotel Loyalty Programs

66% 2022      **62%** 2023

of Likely Hawai'i Visitors are active members of a hotel loyalty program.



Data in bold indicates a statistically significant difference from 2022.

**Base:** Likely Hawai'i Visitors (n=770); member of a hotel loyalty program (n=479)

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



# Overall Likely Hawai'i Visitors Are Less Influenced by These Factors for Hotel Brand Loyalty Than Previous Years, Though Consistent Level of Service and Overall Satisfaction Still Lead the Way.

Influential to Hotel Brand Loyalty

■ 2022 ■ 2023



Data in bold indicates a statistically significant difference from 2022.

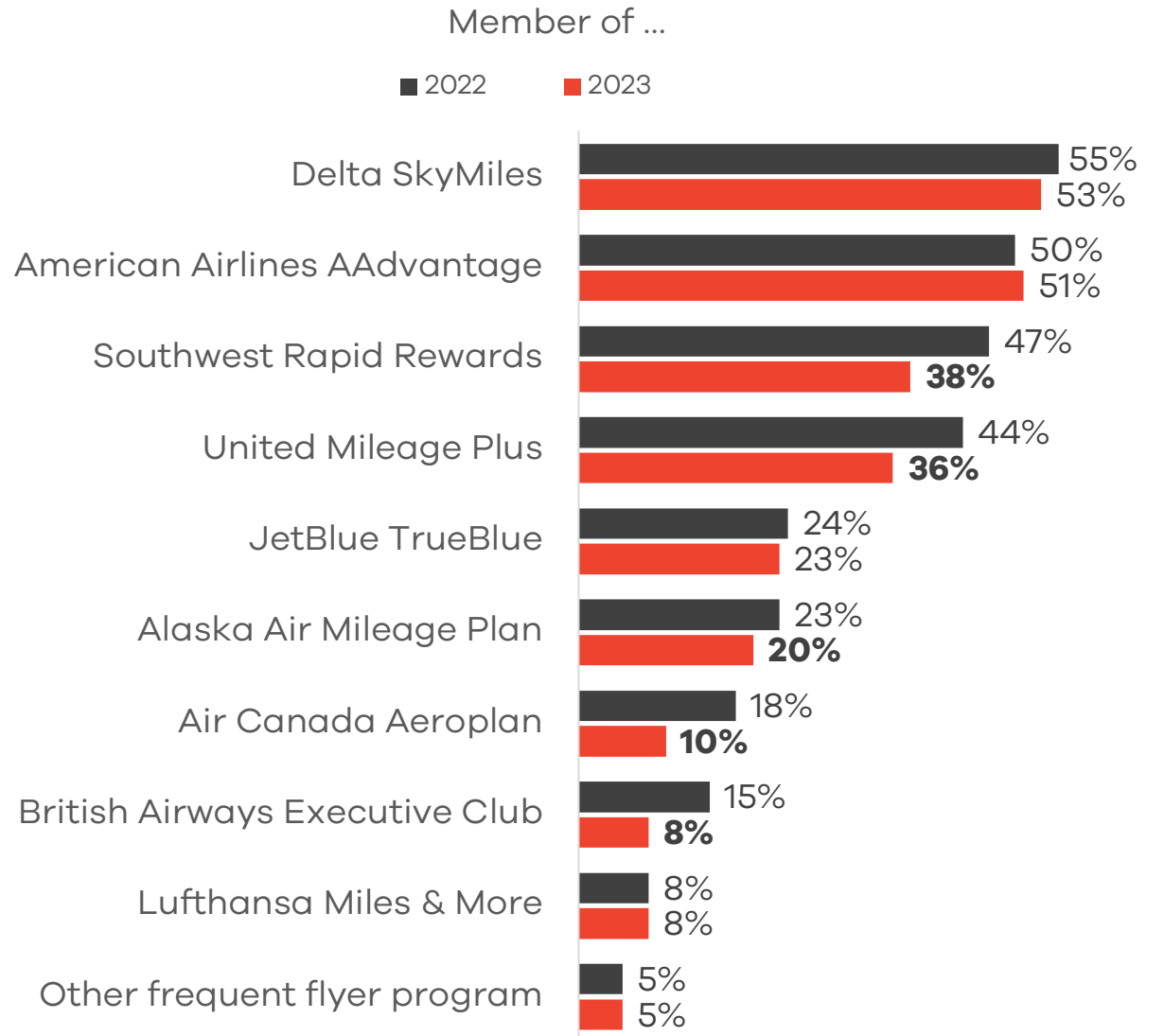
Base: Member of a hotel loyalty program (n=479)

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

# Airline Frequent Flyer Programs

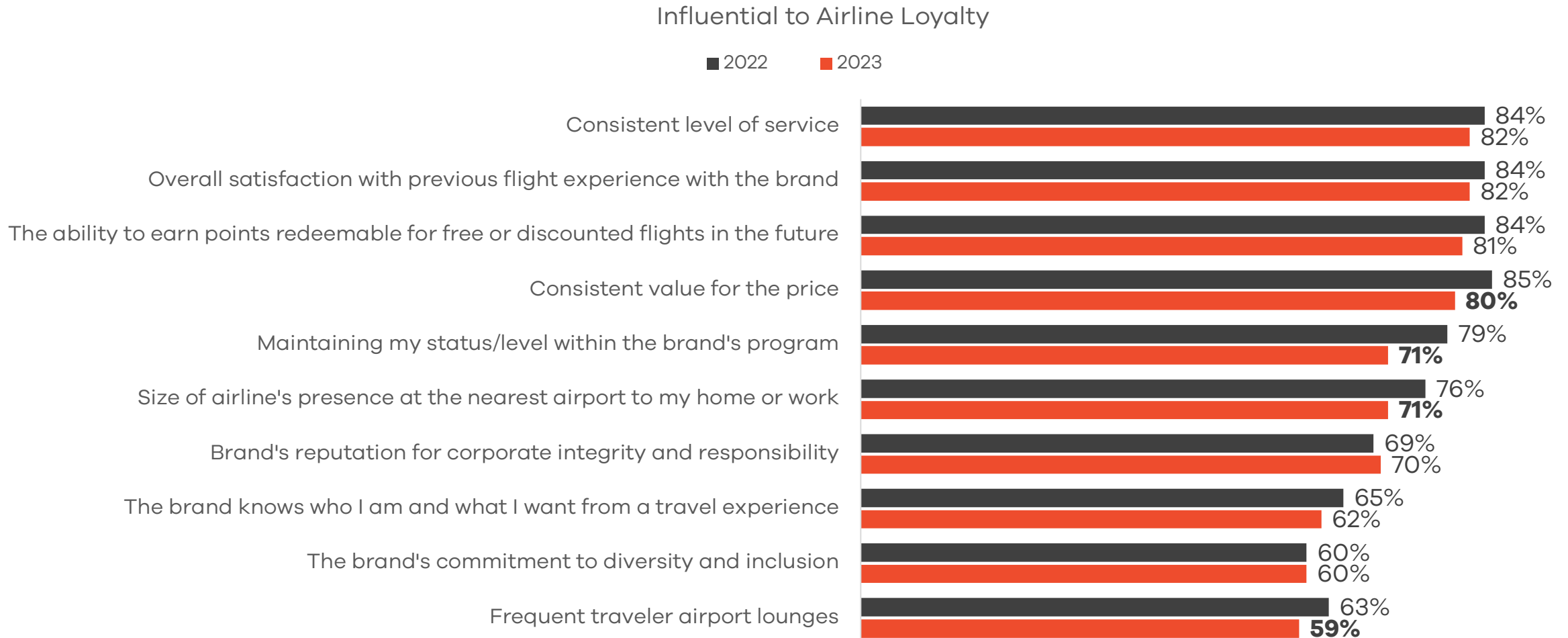
67% 2022      65% 2023

of Likely Hawai'i Visitors are an active member of an airline's frequent flyer program.



Data in bold indicates a statistically significant difference from 2022.  
**Base:** Likely Hawai'i Visitors (n=770); member of a frequent flyer program (n=501)  
**Source:** MMGY Global's 2023 *Portrait of American Travelers*® "Winter Edition"

# Consistency in Level of Service, Previous Satisfaction With the Brand and the Ability to Earn Points Are the Top Influential Factors of Airline Loyalty.



Data in bold indicates a statistically significant difference from 2022.

Base: Likely Hawai'i Visitors and member of a frequent flyer program (n=501)

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

*Winter  
Module*

# Social Media Habits





# The Majority of Likely Hawai'i Visitors Have a Page or Profile on Social Media.

91%  
2022

93%  
2023

of Likely Hawai'i Visitors have a personal page or profile on social media.

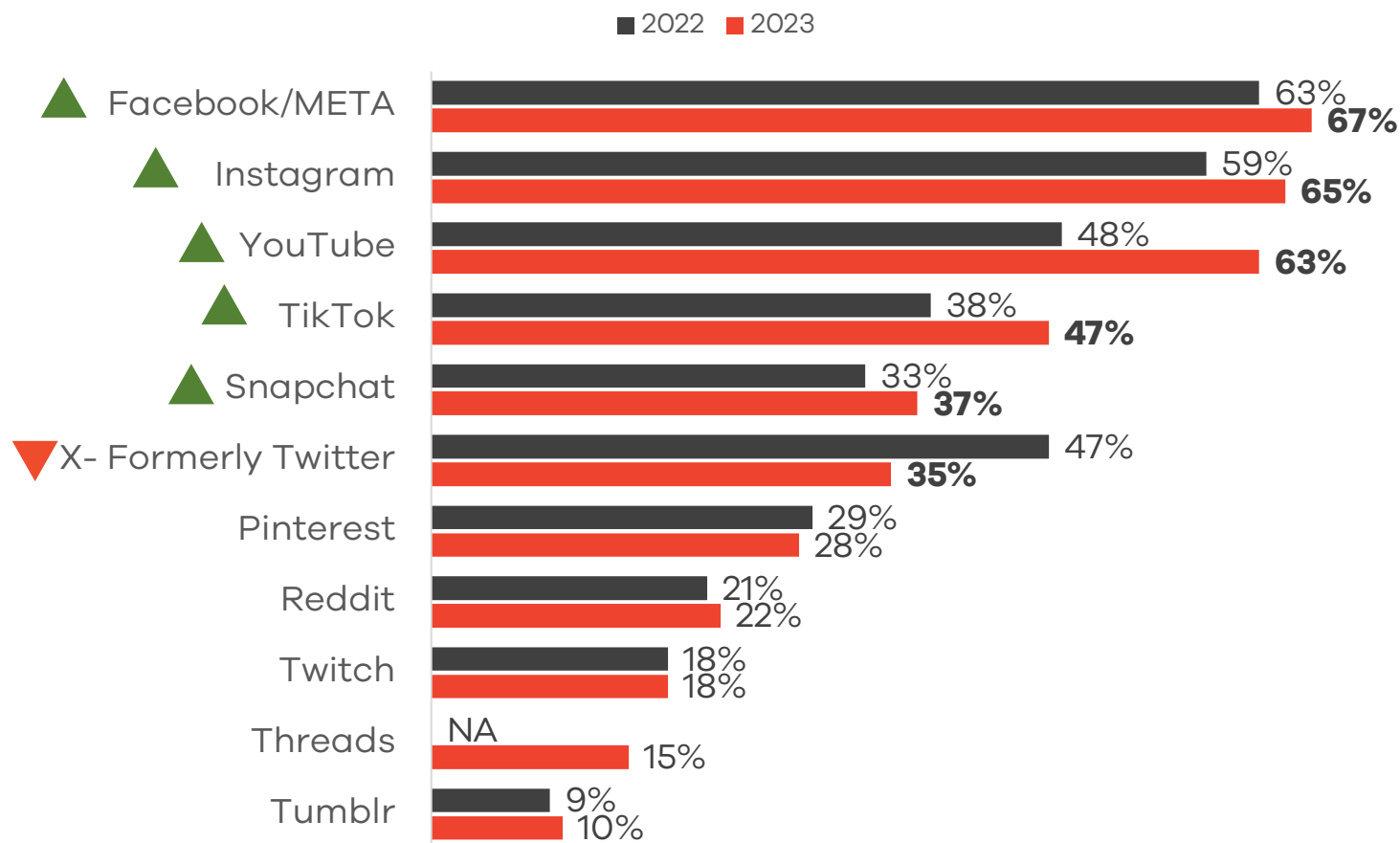
**Base:** Likely Hawai'i Visitors (n=770)

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



# Many of the Most Popular Social Media Sites Saw Increases in Usage From Last Year, With the Most Notable Increase for YouTube.

Personal Page/Profile on Social Media Network



% Spend Most Time On...	
Facebook/META	34%
YouTube	24%
Instagram	20%
TikTok	10%
X (formerly Twitter)	5%
Snapchat	2%
Reddit	2%
Twitch	2%
Pinterest	1%
Tumblr	0%
Threads	0%

Base: Likely Hawai'i Visitors who have a page/profile on social media (n=718)

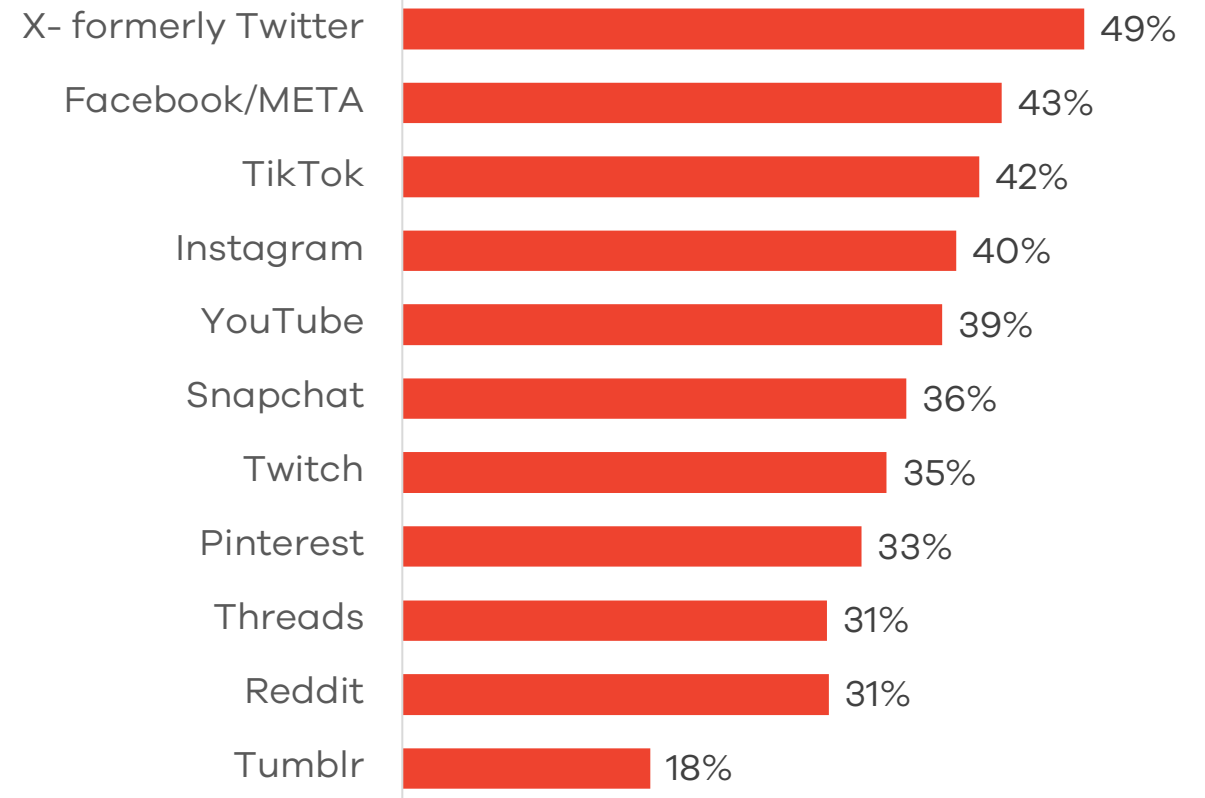
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Winter Edition"

# Nearly Two-Thirds of Likely Hawai'i Visitors Plan to Use At Least One Social Media Platform Less in the Upcoming Year.

**72%**  
2023

of Likely Hawai'i Visitors plan to use at least one of the social media sites they are currently using less in the upcoming year.

Social Media Platform Using Less Over Next Year  
(Among Those Currently Using Each)

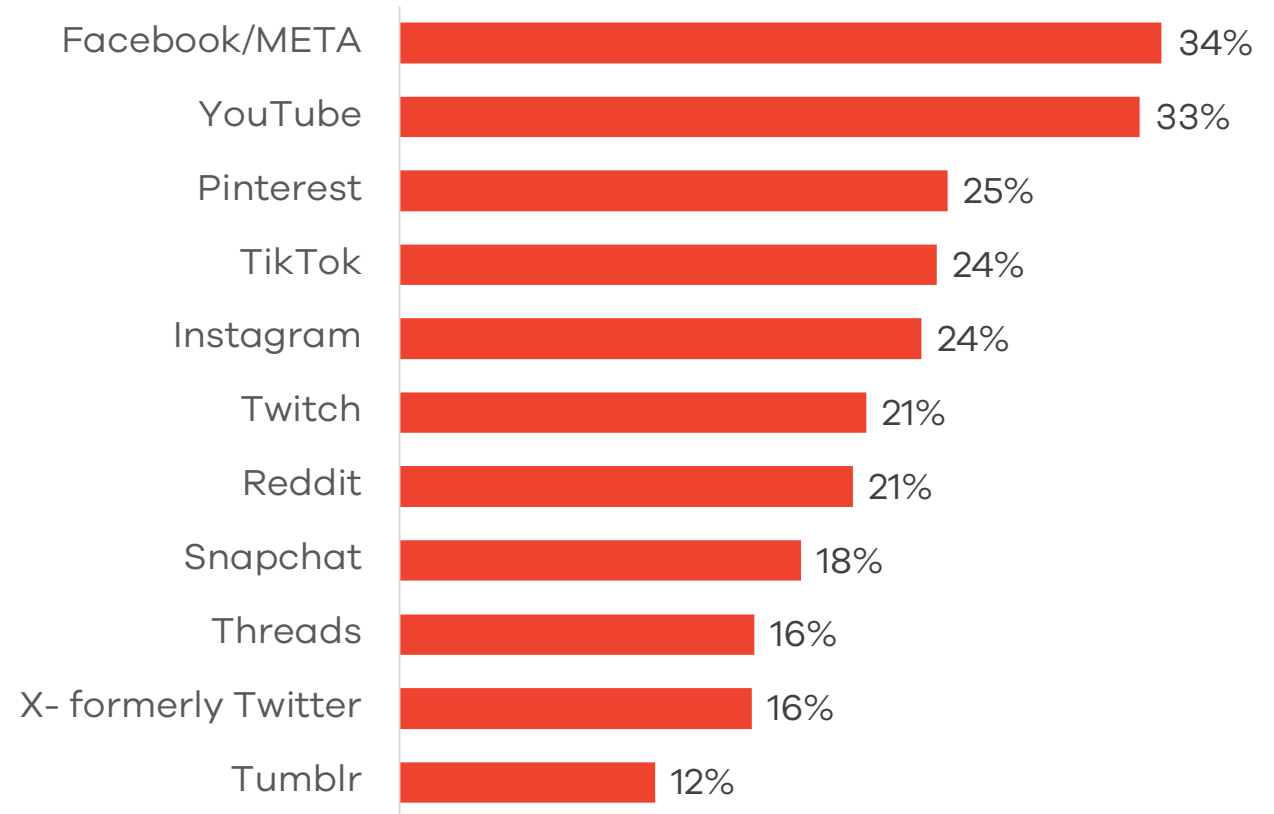


# One Third of Likely Hawai'i Visitors Who Do Not Currently Use Facebook or YouTube Plan to Do So In the Next Year.

**66%**  
2023

of Likely Hawai'i Visitors plan to use a social media platform over the next year that they are not currently using.

% Planning to Use Social Media Platform Over The Next Year  
(Among Those Not Currently Using Each)



Base: Likely Hawai'i Visitors who have a page/profile on social media (n=718)

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

# A Similar Proportion of Likely Hawai'i Visitors Have Selected a Vacation Destination or Travel Service Provider Based on Information on Social Media as Did so in Winter 2022.



of Likely Hawai'i Visitors have selected a vacation destination or travel service provider based at least partially on information, photos or videos viewed on social media.

**Base:** Likely Hawai'i Visitors who have a page/profile on social media (n=718)

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



# Vacation Destinations on Social Media



of Likely Hawai'i Visitors follow a vacation destination on social media.

/ The majority of categories saw significant increases in value compared to last year, with the most drastic increases within insider information and influencer experiences.

Valued Content on Social Media From Travel Destinations

■ 2022 ■ 2023



**Base:** Likely Hawai'i Visitors who have a page/profile on social media (n=718); those who follow a vacation destination on social media (n=411)

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



# Travel Service Providers on Social Media

50%  
2022

53%  
2023

of Likely Hawai'i Visitors follow a travel service provider on social media.

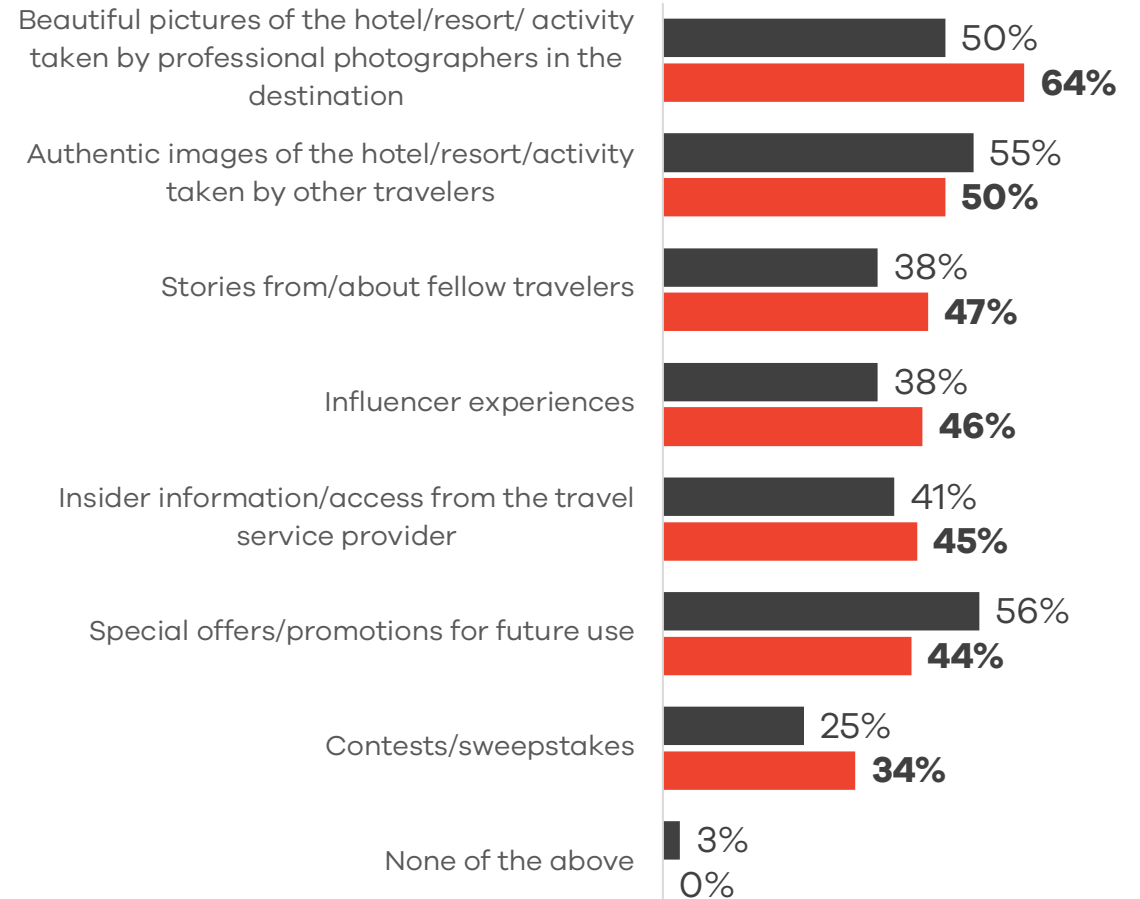
/ Likely Hawai'i Visitors are more influenced by the experience of a destination than by deals or sweepstakes, with more than half looking for pictures and images that capture the beauty of a destination from professionals and travelers alike.

**Base:** Likely Hawai'i Visitors who have a page/profile on social media (n=718); those who follow a travel service provider on social media (n=381)

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

Valued Content on Social Media From Travel Service Brands

■ 2022 ■ 2023



# Eight in 10 of Likely Hawai'i Visitors Who Follow a Social Media Influencer or Content Creator are at Least Somewhat Influenced by Them When Making Travel Decisions.

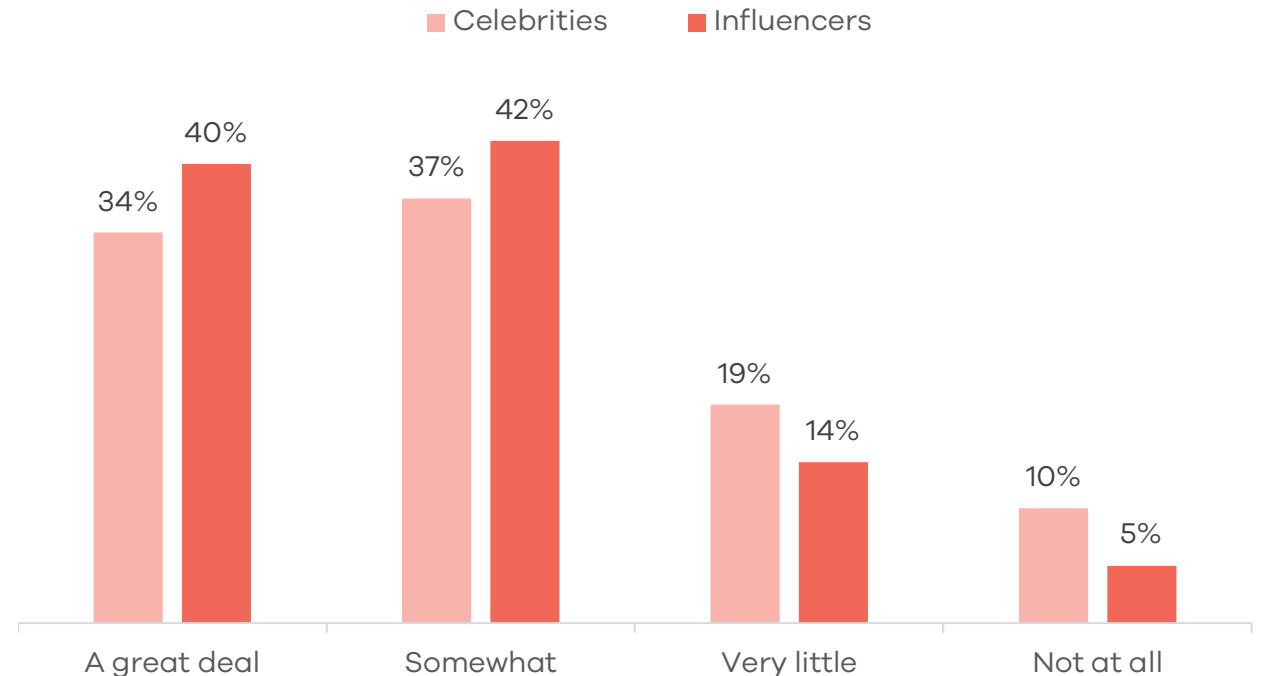
**61%**  
2023

of Likely Hawai'i Visitors follow a celebrity on social media (compared to 47% of U.S. Leisure Travelers.)

**65%**  
2023

of Likely Hawai'i Visitors follow an influencer or content creator on social media (compared to 46% of U.S. Leisure Travelers.)

Influence Social Media Celebrities and Influencers Have on Travel Decisions



**Base:** Likely Hawai'i Visitors who have a page/profile on social media (n=718); those who follow a celebrity on social media (n=437); Those who follow an influencer on social media (n=465)

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



# Eight in 10 Likely Hawai'i Visitors Perceive the Travel Content Influencers Share to Be Authentic Representations.

**84%**  
2023

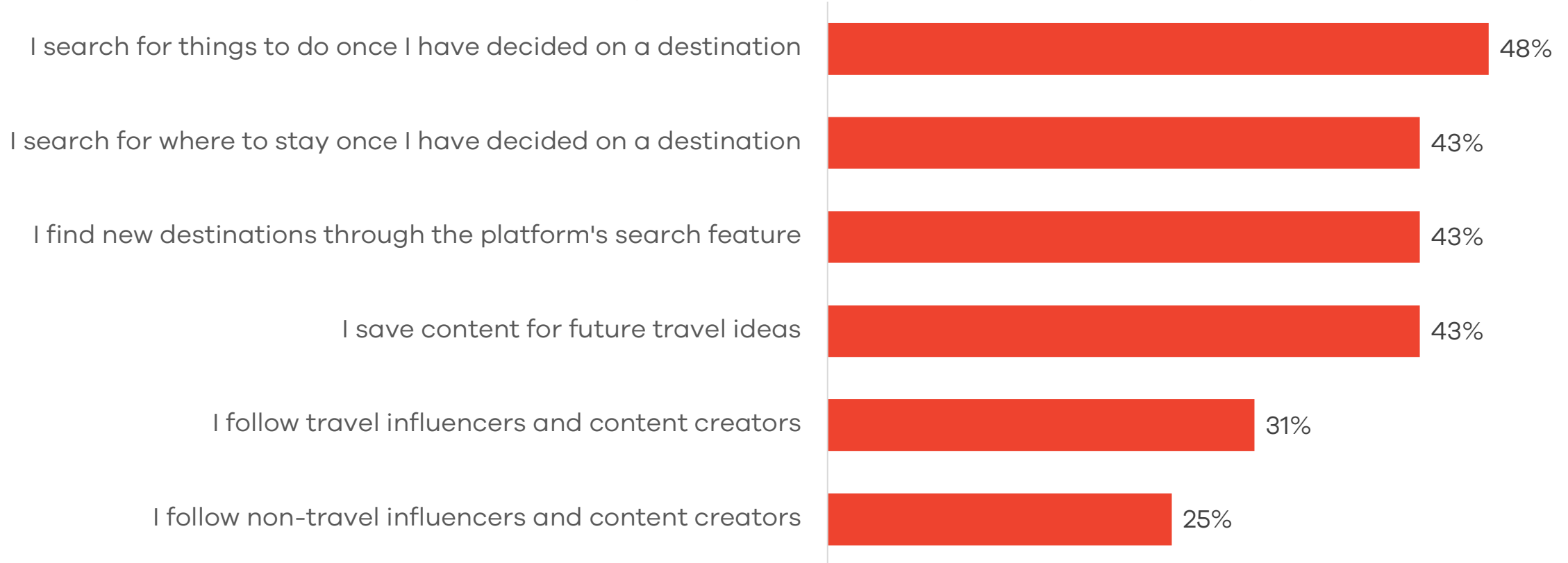
of Likely Hawai'i Visitors perceive the content influencers share to be authentic representations of the travel destinations they visit (compared to 71% of U.S. Leisure Travelers).

**Base:** Likely Hawai'i Visitors who have a page/profile on social media and who follow an influencer or content creators on social media (n=516)

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

# Nearly Half of Likely Hawai'i Visitors Who Use Social Media for Travel Planning Do So to Search For Things to Do Once They Have Decided on a Destination.

How Social Media is Used for Travel Planning  
(Among Those Who Use Social Media for Travel Planning)



Base: Likely Hawai'i Visitors who use social media for planning travel (n=598)

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

# Significantly More Likely Hawai'i Visitors Have Made a Travel Purchase Based At Least Partially on a Post by a Celebrity or Influencer.



of Likely Hawai'i Visitors who follow a celebrity or influencer on social media have made a travel purchase based at least partially on a post by a celebrity or influencer.

**Base:** Likely Hawai'i Visitors who have a page/profile on social media and follow a celebrity or influencer on social media (n=465)

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







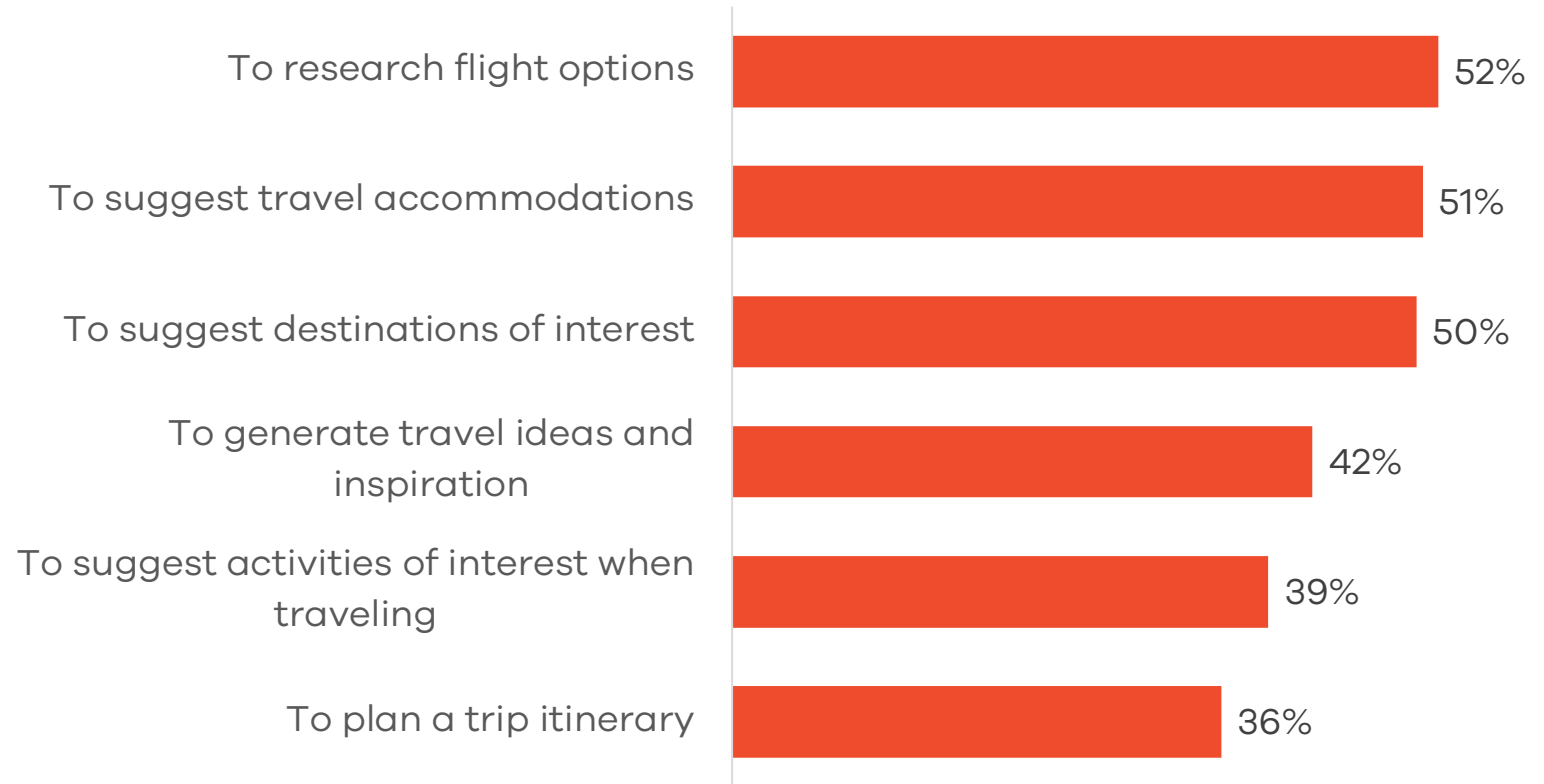
# Vacation Motivators and Activities

# The Most Popular Uses of AI When Travel Planning For Likely Hawai'i Visitors Are to Research Flight Options and Suggest Travel Accommodations.

56%

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

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



Base: Likely Hawai'i Visitors (n=770); those who have used ChatGPT or another AI tool for travel planning (n=403)

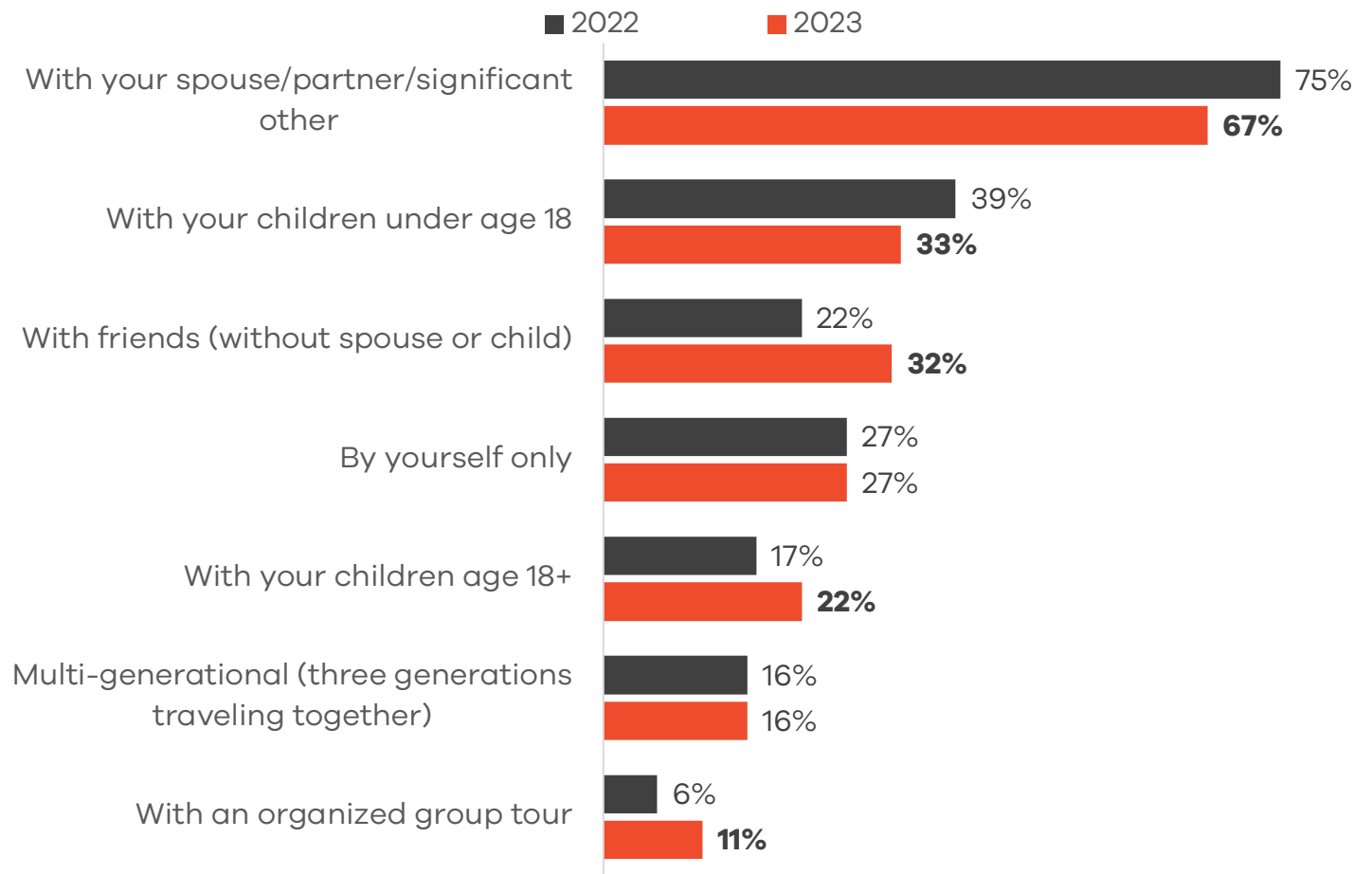
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Winter Edition"





# Traveling With Friends is up Significantly From Last Year for Likely Hawai'i Visitors.

Travel Party During the Next Six Months



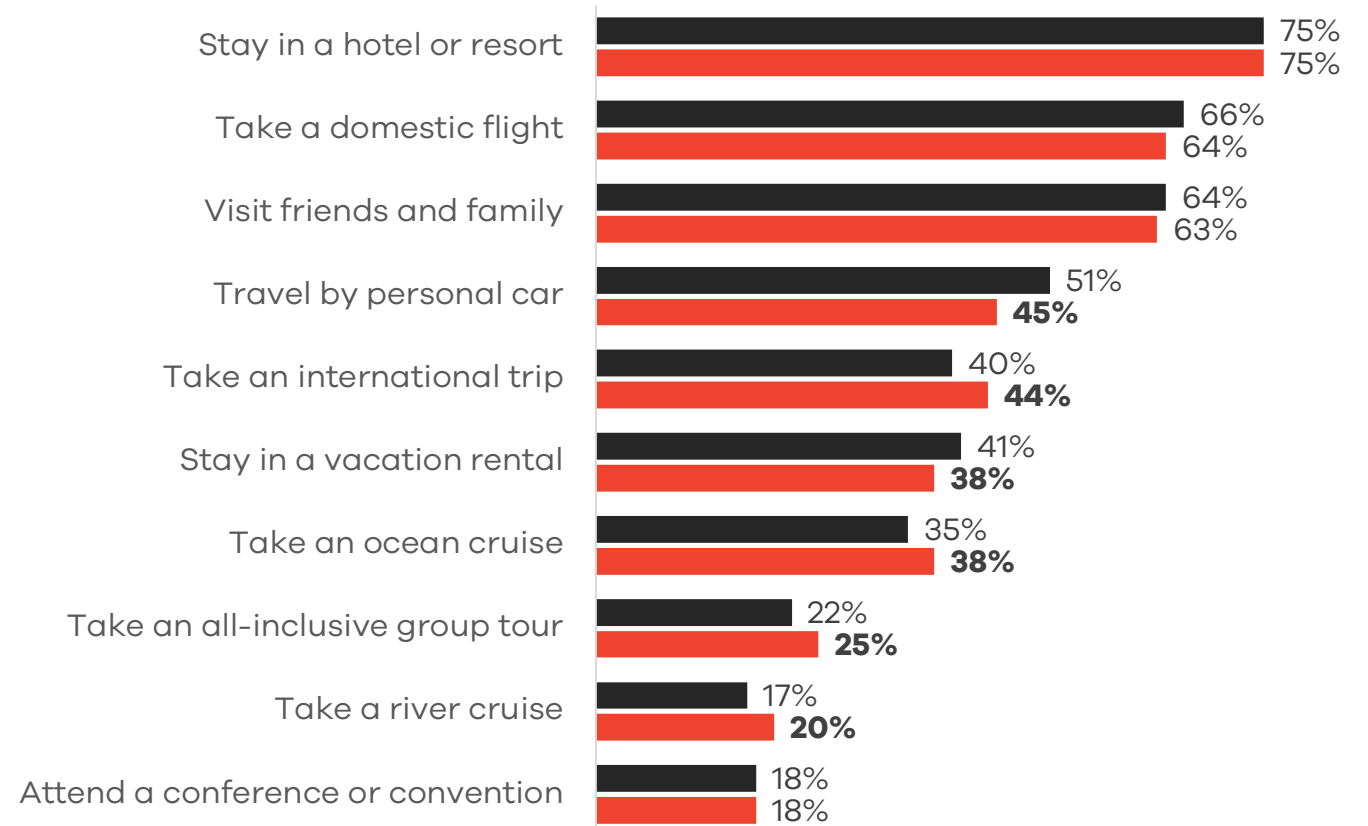
Data in bold indicates a significant difference from Winter 2022.  
**Base:** Likely Hawai'i Visitors who intend to travel during the next six months (n=719)  
**Source:** MMGY Global's 2023 *Portrait of American Travelers*® "Winter Edition"



# Three-Quarters Of Likely Hawai'i Visitors Are Planning To Stay In A Hotel In The Next Six Months.

Travel Expectations in the Next 6 Months

■ 2022 ■ 2023



Data in bold indicates a significant difference from Winter 2022.

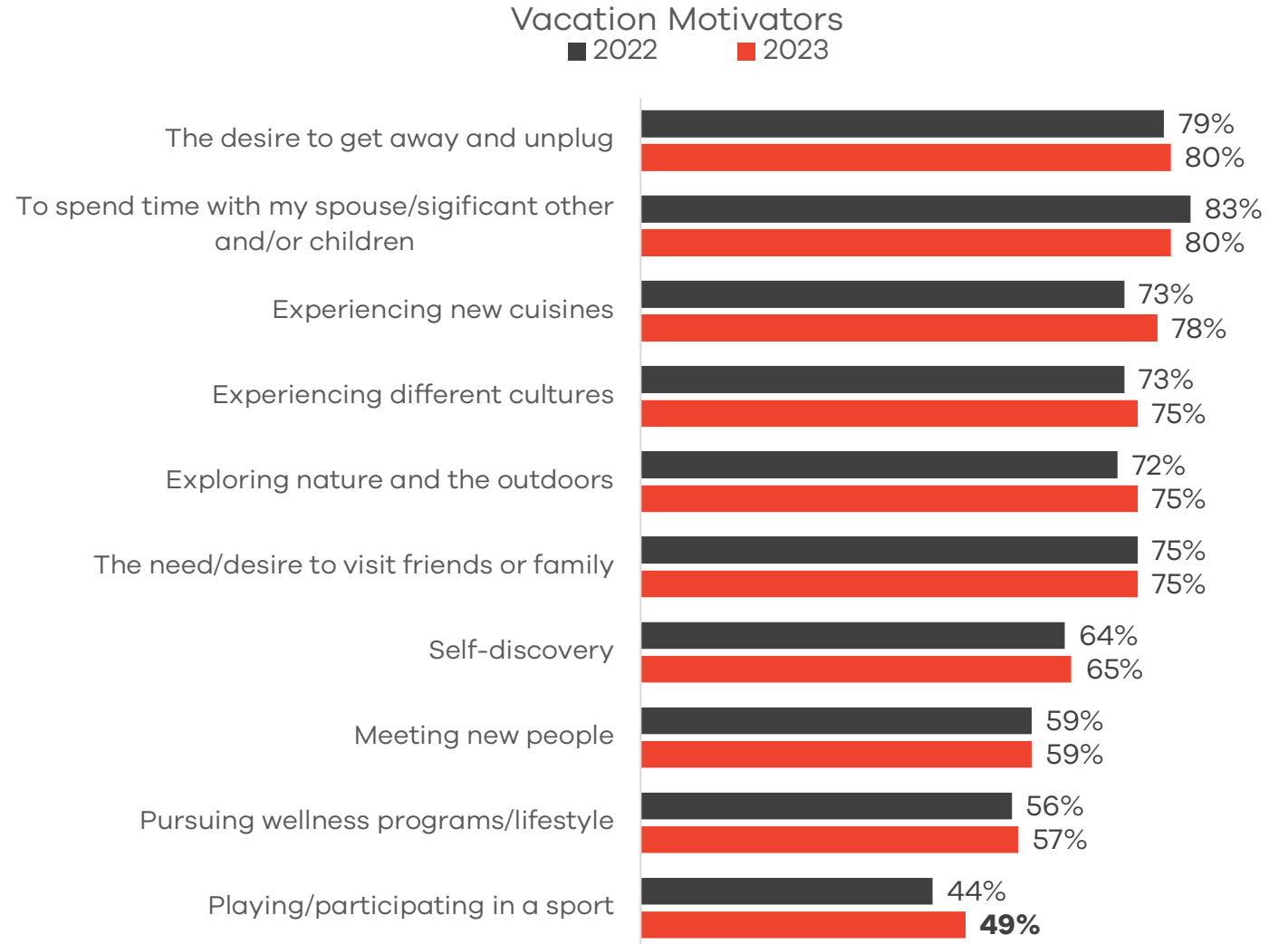
**Base:** Likely Hawai'i Visitors who intend to travel during the next six months (n=719)

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





# Spending Time With Their Spouse/Significant Other And/Or Children And Unplugging Are The Top Motivators to Travel For Likely Hawai'i Visitors.



Data in bold indicates a significant difference from Winter 2022.

**Base:** Likely Hawai'i Visitors (n=770)

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

# What Destination Attributes Influence Choice of Destination?

Influential When Selecting a Destination	2022	2023
Beautiful scenery	72%	<b>68%</b>
Food and drink scene	61%	63%
Safety	53%	<b>61%</b>
Outdoor/nature activities	49%	<b>52%</b>
Historical significance of a destination	52%	<b>49%</b>
Focus on family activities	33%	<b>36%</b>
Music scene	30%	<b>35%</b>
Nightlife/bars	26%	<b>35%</b>
A sense of tradition (place family has traditionally visited)	39%	<b>34%</b>
The ethnic diversity and multicultural population of a destination	31%	30%
The destination's reputation for environmental responsibility	26%	24%
The destination's commitment to social justice and equality	23%	22%
LGBTQ+ travel offerings	9%	8%

Data in bold indicates a significant difference from Winter 2022.

- / Beautiful scenery is the top attribute travelers look for when selecting a destination.
- / Safety, outdoor/nature activities, focus on family activities, music scene and nightlife all increased significantly compared to Winter 2022.

# Activities of Interest on Vacation

	2022	2023
Beach experiences	53%	54%
Shopping	48%	50%
Visiting a museum	48%	48%
Historical sites	49%	47%
Food tours	NA	46%
Visiting a state or national park	47%	<b>44%</b>
Dining cruise	37%	<b>43%</b>
Visiting a zoo or aquarium	39%	<b>42%</b>
Hiking/climbing/biking/other outdoor adventures	39%	39%
Visiting a theme or amusement park	38%	39%
Adventure travel (safaris, mountain climbing, trekking vacations, etc.)	35%	36%
Attending a concert/music festival	33%	35%
Nightlife	32%	<b>35%</b>
Guided tours with access to local experiences that are otherwise inaccessible	35%	33%
Visiting notable architectural sites	40%	<b>32%</b>
Cooking, wine or cocktail class	NA	31%
Attending a sporting event	27%	29%
Exploring family's ancestry/past on a heritage vacation	30%	29%
Film/art festivals	21%	<b>29%</b>
Camping	26%	28%
Casino gambling	26%	28%
Dinner theatre	30%	28%
Spa Services (massages, facials, etc.)	29%	28%
Attending performing arts events	24%	25%
Water sports (waterskiing, boating/rafting)	24%	25%
Playing tennis	13%	<b>18%</b>
Playing golf	17%	17%
Snow skiing/snowboarding	19%	16%
Scuba diving	17%	15%

/ Beach experiences, shopping, visiting a museum and historical sites are the top activities Likely Hawai'i Visitors look for when selecting a destination.

/ Interest in dining cruises, visiting a zoo or aquarium nightlife, film/art festivals and playing tennis increased significantly compared to last year.

Data in bold indicates a significant difference from Winter 2022.

Base: Likely Hawai'i Visitors (n=770)

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





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THANK YOU