

Winter 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 October 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 7786 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.

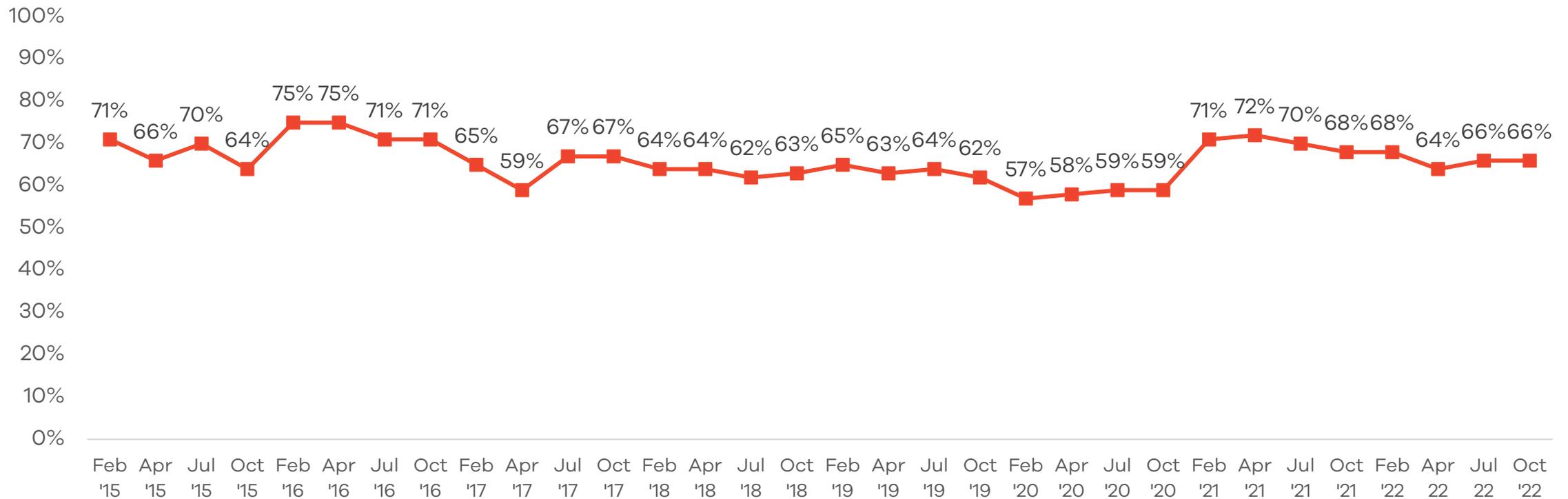
The four generations of adults surveyed are defined below. Due to the small the number of Silent/GI respondents, we did not include their individual results in this report.

Generation	Age	% of Respondents
Gen Zs	18–24	12%
Millennials	25–40	42%
Gen Xers	41–56	22%
Boomers	57–75	22%
Silent/GI	75+	1%

# Hawaii Tourism Proprietary Questions

# Interest in Visiting Hawaii is Down Slightly from October '21.

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



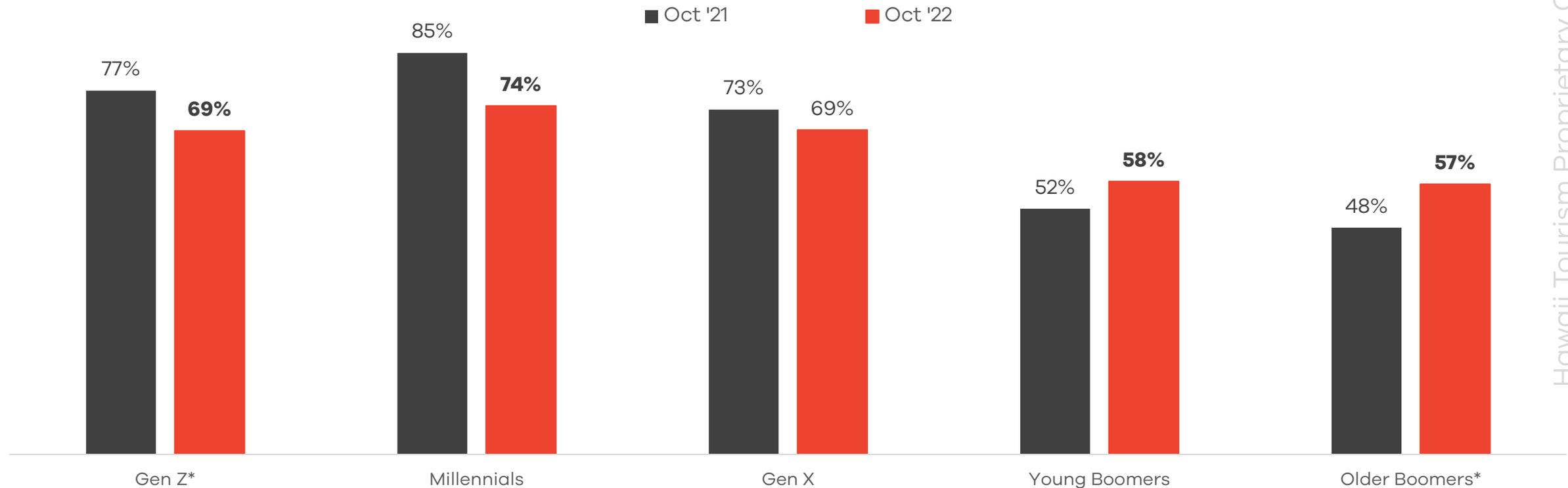
Hawaii Tourism Proprietary Questions

Base: Air Travelers (n=1,616)

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

# Interest in Visiting Hawaii Declined in Younger Generations But Increased Significantly in Older Generations.

Interest in Visiting Hawaii  
By Generation



\* Small sample size – Interpret with caution.

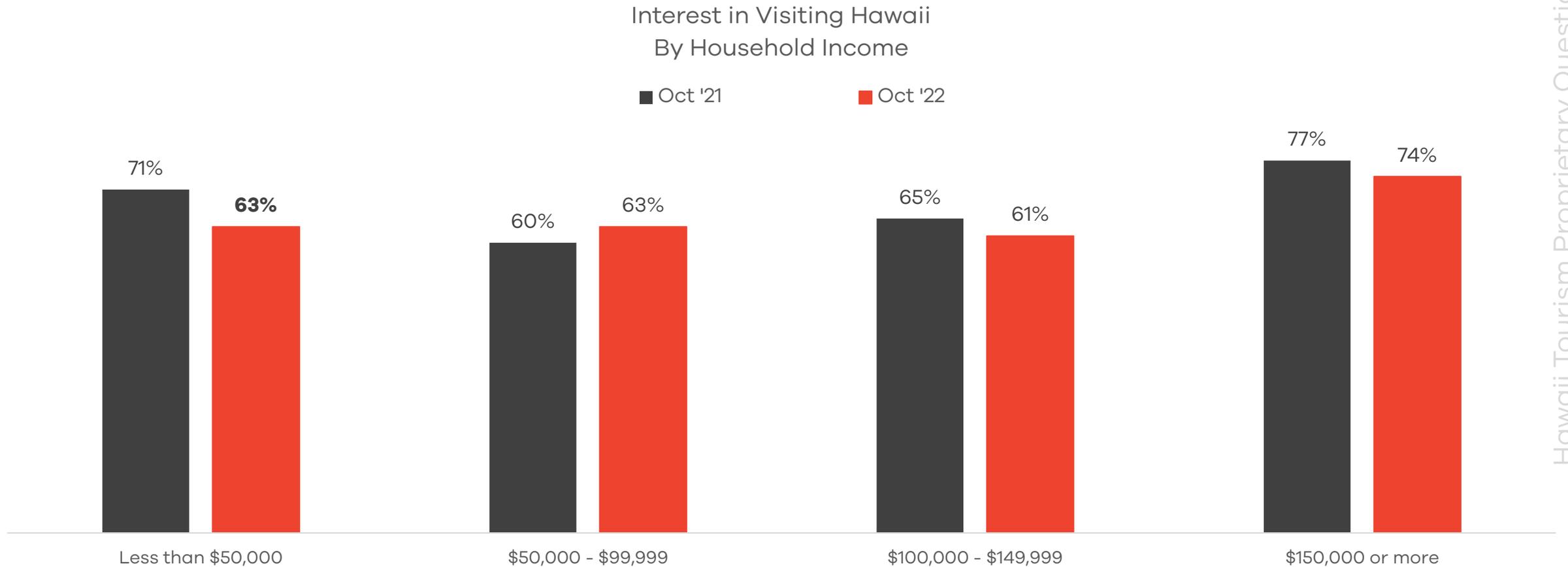
Data in bold indicates a significant difference from October 2021.

Base: Air Travelers (n=1,616)

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

Hawaii Tourism Proprietary Questions

# Interest in Visiting Hawaii Has Decreased Among Those With Incomes of Less Than \$50,000.



Hawaii Tourism Proprietary Questions

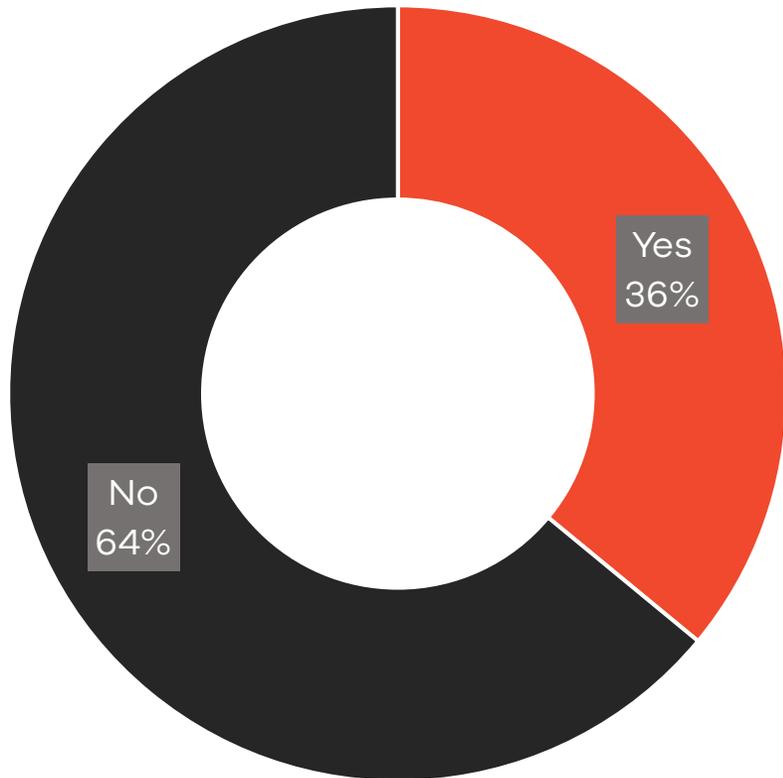
Data in bold indicates a significant difference from October 2021.

**Base:** Air Travelers (n=1,616)

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

# The Cost to Visit Hawaii is the Top Deterrent to Visit, All Increasing Significantly From Last Year.

Considered Visiting Hawaii But Changed Mind



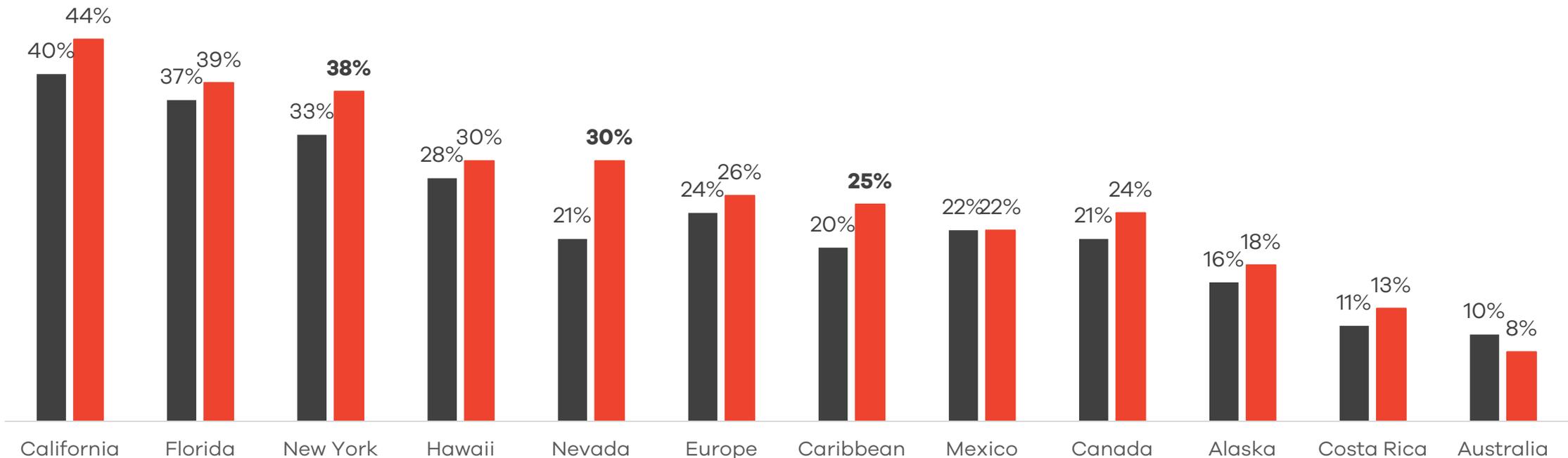
Reasons For Not Visiting Hawaii – Among Those Who Changed Their Mind	Oct '21	Oct '22
Price of airfare	21%	<b>34%</b>
Price of a vacation package	22%	<b>33%</b>
Price of the hotel	23%	<b>28%</b>
Hawaii's COVID-19 travel restrictions	27%	25%
Better value at another destination	16%	<b>22%</b>
The flight to Hawaii is too long	17%	20%
Concerns about COVID-19 variants	21%	19%
Not enough time to travel to Hawaii	11%	13%
Not sure which island(s) in Hawaii to visit	11%	12%
Hurricanes and tropical storms hitting Hawaii	9%	11%
Already been and want to try another destination	13%	10%
Hawaii is not unique enough	12%	10%
Accommodations were not available	10%	10%
Local people are not friendly	8%	9%
Hawaii is too crowded	13%	<b>9%</b>
Hawaii is not exotic enough	10%	9%
Not enough activities in Hawaii	10%	8%

Data in bold indicates a significant difference from October 2021.

# Past Visitation To Hawaii Rose Slightly From Oct '21.

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

■ Oct '21      ■ Oct '22

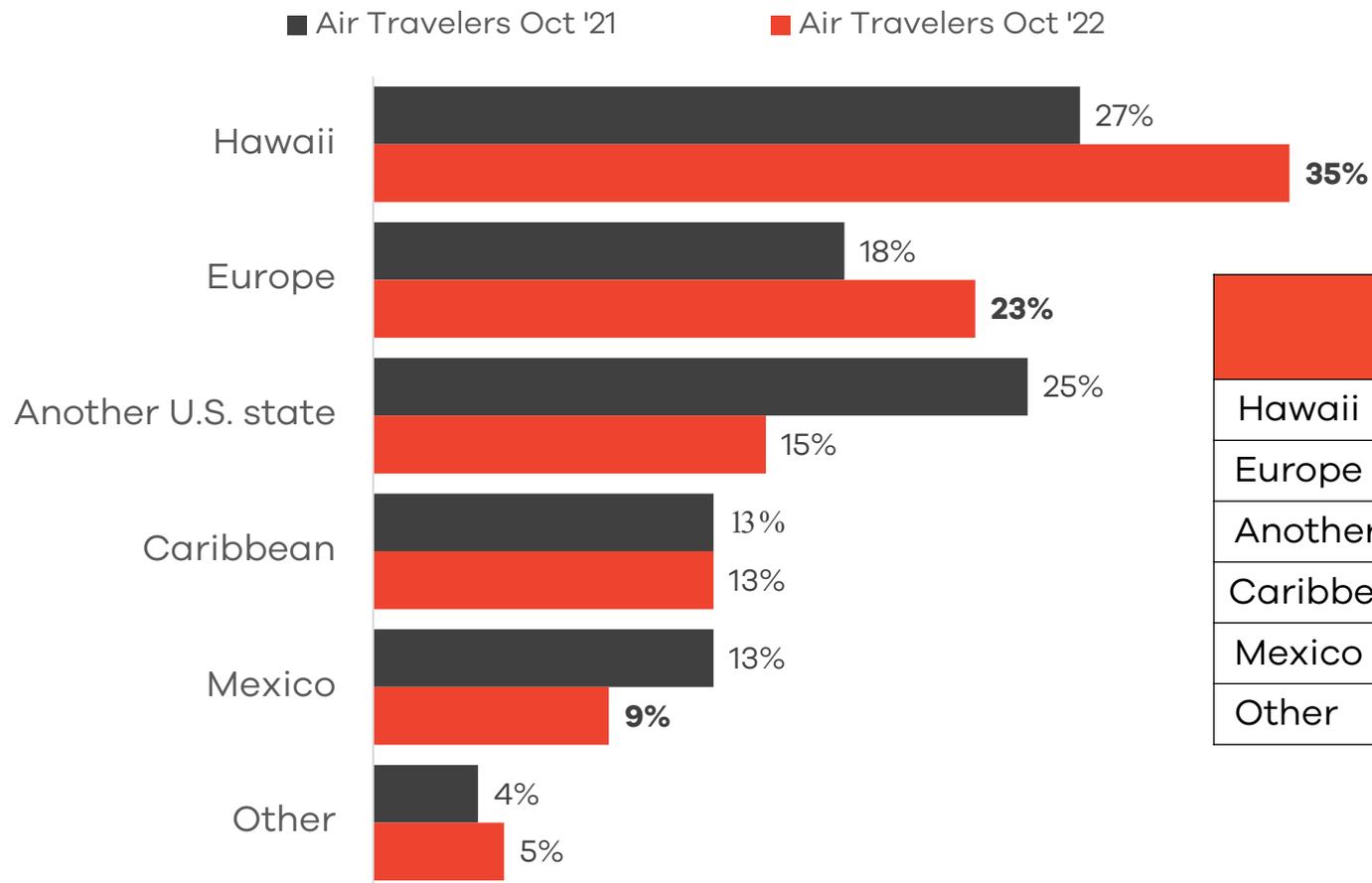


Data in bold indicates a significant difference from October 2021.

**Base:** Likely to Visit Hawaii (n=786)

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

# Compared to Oct '21, Significantly More Air Travelers Are Interested in Visiting Hawaii and 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	19%	19%	<b>35%</b>
Europe	15%	19%	23%
Another U.S. state	38%	33%	<b>15%</b>
Caribbean	12%	13%	13%
Mexico	8%	10%	9%
Other	9%	6%	5%

Data in bold indicates a significant difference from October 2021.

Base: U.S. Leisure Travelers (n=3,494), Air Travelers (n=1,616), Likely to Visit Hawaii (n=786)

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



# HAWAII TOURISM PROPRIETARY SUMMARY

## KEY TAKEAWAY:

- Interest in visiting Hawaii is down slightly from last year. This decrease is seen among GenZ/Millennials and those with household incomes of \$50,000 or less.
- Among those who planned to visit Hawaii but changed their mind, the most cited reasons for doing so are costs associated with visiting Hawaii, specifically for airfare, vacation packages, and hotel. Compared to last year, significantly more respondents cited that the cost was too high, and that they could find a better value elsewhere.

## WHAT IT MEANS:

The costs of traveling to Hawaii continue to play a role in air travelers plans to visit. As we mentioned in Summer and Fall, with rising costs of travel and inflation, this could ultimately impact traveler's interest in traveling to Hawaii. Although we saw a slight decrease in interest from last year, the percentage interested continue to be in line with interest measured pre-COVID. While we're not seeing a significant impact on interest yet, it will be important to keep an eye on how the affordability of travel and inflation will affect travel in the future.



# The Hawaii Prospect

# Self-Described Personas

	U.S. Leisure Travelers	Likely Hawaii Visitors
Beach lover	47%	<b>52%</b>
Foodie	42%	43%
Pet lover	41%	39%
Family traveler (2022+)	37%	38%
Outdoor adventurer	30%	<b>36%</b>
Travel bargain hunter (2022+)	28%	29%
Sports fan/enthusiast	25%	<b>29%</b>
Theme park enthusiast (2022+)	23%	<b>29%</b>
Moderate (politically)	23%	24%
Conservative (politically)	22%	<b>17%</b>
Environmentally-conscious	21%	<b>28%</b>
All-inclusive resort enthusiast (2022+)	21%	<b>28%</b>
World traveler	21%	<b>34%</b>
Concert/festival enthusiast	21%	<b>26%</b>
Cruise lover (2022+)	20%	<b>29%</b>
Wine enthusiast	20%	<b>27%</b>
Liberal (politically)	19%	20%
Luxury traveler	18%	<b>31%</b>
Recreational cannabis user	11%	12%
Golf enthusiast	9%	<b>13%</b>
Social justice activist	9%	<b>15%</b>
Ski/snowboard enthusiast	7%	<b>12%</b>
Road warrior (business travel) (2022+)	5%	<b>12%</b>

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

**Base:** U.S. Leisure Travelers (n=3,494), Likely to Visit Hawaii (n=786)

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

# Demographics

	U.S. Leisure Travelers	Likely Hawaii Visitors
Male	48%	<b>55%</b>
Female	51%	<b>45%</b>
Other	1%	1%
Gen Zs	13%	12%
Millennials	28%	<b>42%</b>
Gen Xers	24%	22%
Young Boomers	18%	<b>12%</b>
Older Boomers	12%	10%
Have children under 18 at home	33%	<b>52%</b>
White	71%	71%
Hispanic	17%	<b>23%</b>
African American/Black	15%	13%
Asian	7%	<b>13%</b>
Native American	3%	<b>1%</b>
Pacific Islander	1%	0%
Other	7%	<b>5%</b>

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

**Base:** U.S. Leisure Travelers (n=3,494), Likely to Visit Hawaii (n=786)  
**Source:** MMGY Global's 2022 *Portrait of American Travelers*® "Winter Edition"

# Demographics

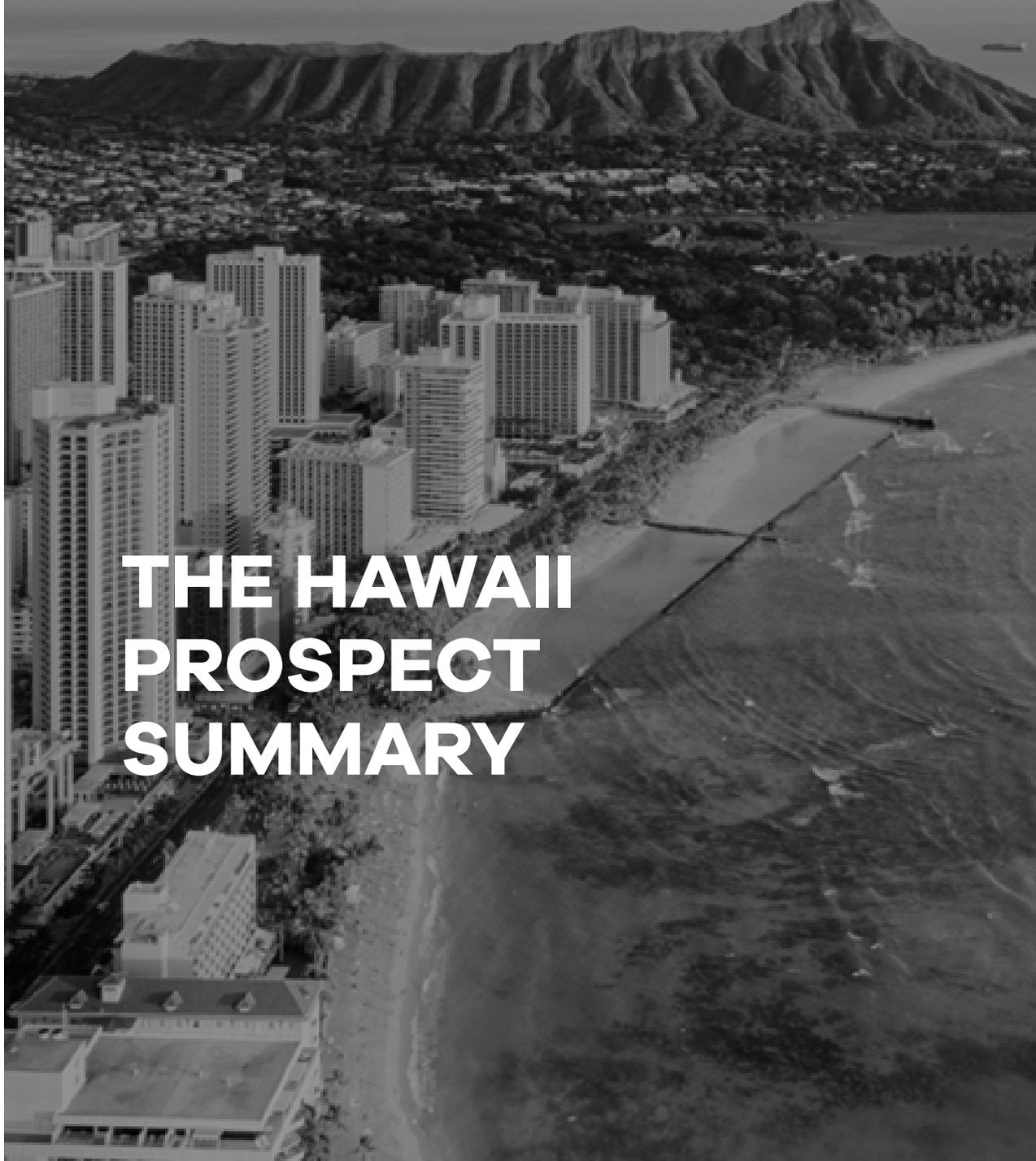
	U.S. Leisure Travelers	Likely Hawaii Visitors
Under \$30,000	16%	<b>5%</b>
\$30,000 - \$49,999	14%	<b>8%</b>
\$50,000 - \$74,999	18%	16%
\$75,000 - \$99,999	11%	10%
\$100,000 - \$124,999	10%	11%
\$125,000 - \$149,999	8%	<b>11%</b>
\$150,000 - \$249,999	17%	<b>25%</b>
\$250,000 - \$499,999	4%	<b>10%</b>
\$500,000 or more	2%	2%
4 years or less of high school	38%	<b>20%</b>
1-3 years of college	27%	27%
4 years of college	22%	<b>31%</b>
Some graduate school	2%	2%
Graduate/professional degree	10%	<b>19%</b>

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

# Demographics

	U.S. Leisure Travelers	Likely Hawaii Visitors
South	38%	<b>33%</b>
West	24%	<b>34%</b>
Midwest	21%	18%
Northeast	17%	15%
Employed (full or part-time)	52%	<b>67%</b>
Retired	27%	<b>16%</b>
Temporarily unemployed	9%	<b>5%</b>
Homemaker full-time	9%	8%
Student	4%	4%
Married/living together	62%	<b>73%</b>
Never married	24%	<b>18%</b>
Divorced/separated/widowed	14%	<b>8%</b>

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



# THE HAWAII PROSPECT SUMMARY

## KEY TAKEAWAY:

- Likely Hawaii Visitors describe themselves as a beach lover, foodie, pet lover, and family traveler. They are more likely than the average U.S. Leisure Traveler to describe themselves as a beach lover, outdoor adventurer, sports fan enthusiast, theme park enthusiast, environmentally-conscious, all-inclusive resort enthusiast, world traveler, concert/festival enthusiast, cruise lover, wine enthusiast, and luxury traveler.
- Compared to U.S. Leisure Travelers, Likely Hawaii Visitors are younger, more diverse, well-educated, and have higher household incomes. They also are more likely to be married and have children.

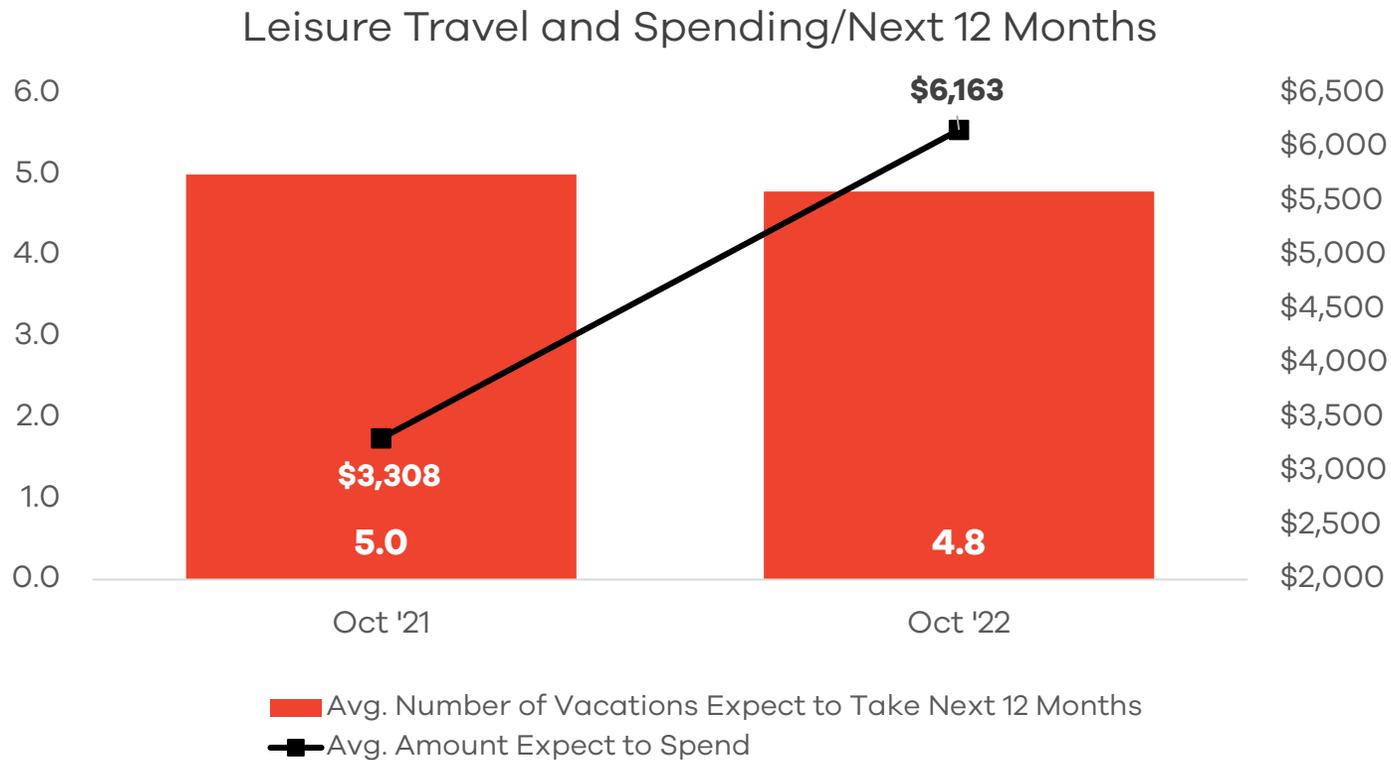
## WHAT IT MEANS:

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

An aerial photograph of a tropical beach. The scene is dominated by numerous palm trees, their long shadows cast across the sandy shore. In the lower right, a boat is visible on the water's edge. The overall image has a semi-transparent grey overlay, and the title text is placed on a darker grey rectangular background on the left side.

# Travel Outlook Snapshot

# Travel Intentions Display Slight Decrease From October '21 While Spending Intentions Are Up Significantly.



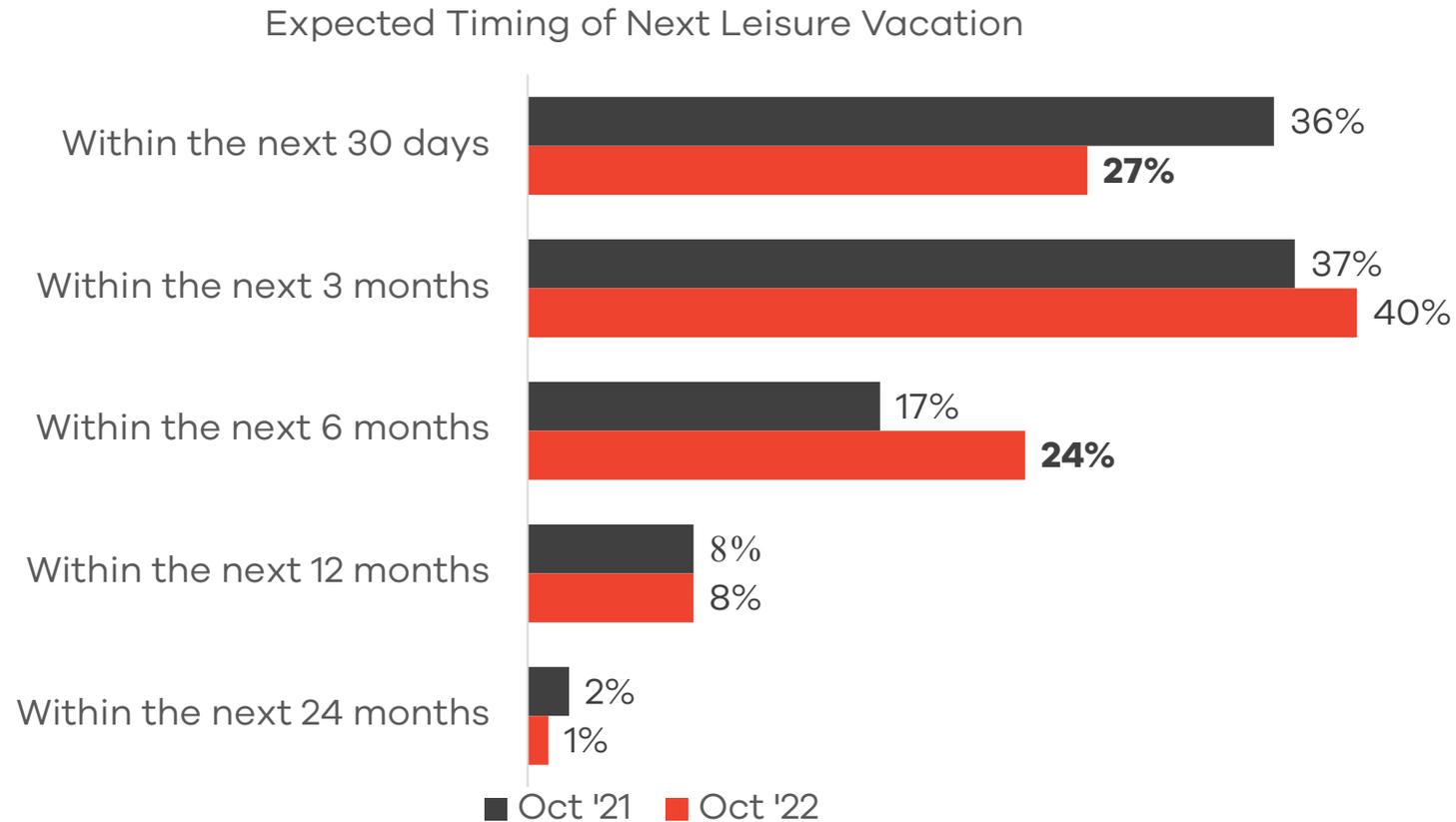
/ This increase in travel spending could be because they're planning to take more expensive trips, or it could be due to inflation and travel costs increasing.

Traveler Intentions: Over Time

Base: Likely to Visit Hawaii & Planning to Take a Trip in the Next 12 Months (n=661)

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

# Short Term Travel Declined Compared to October '21.



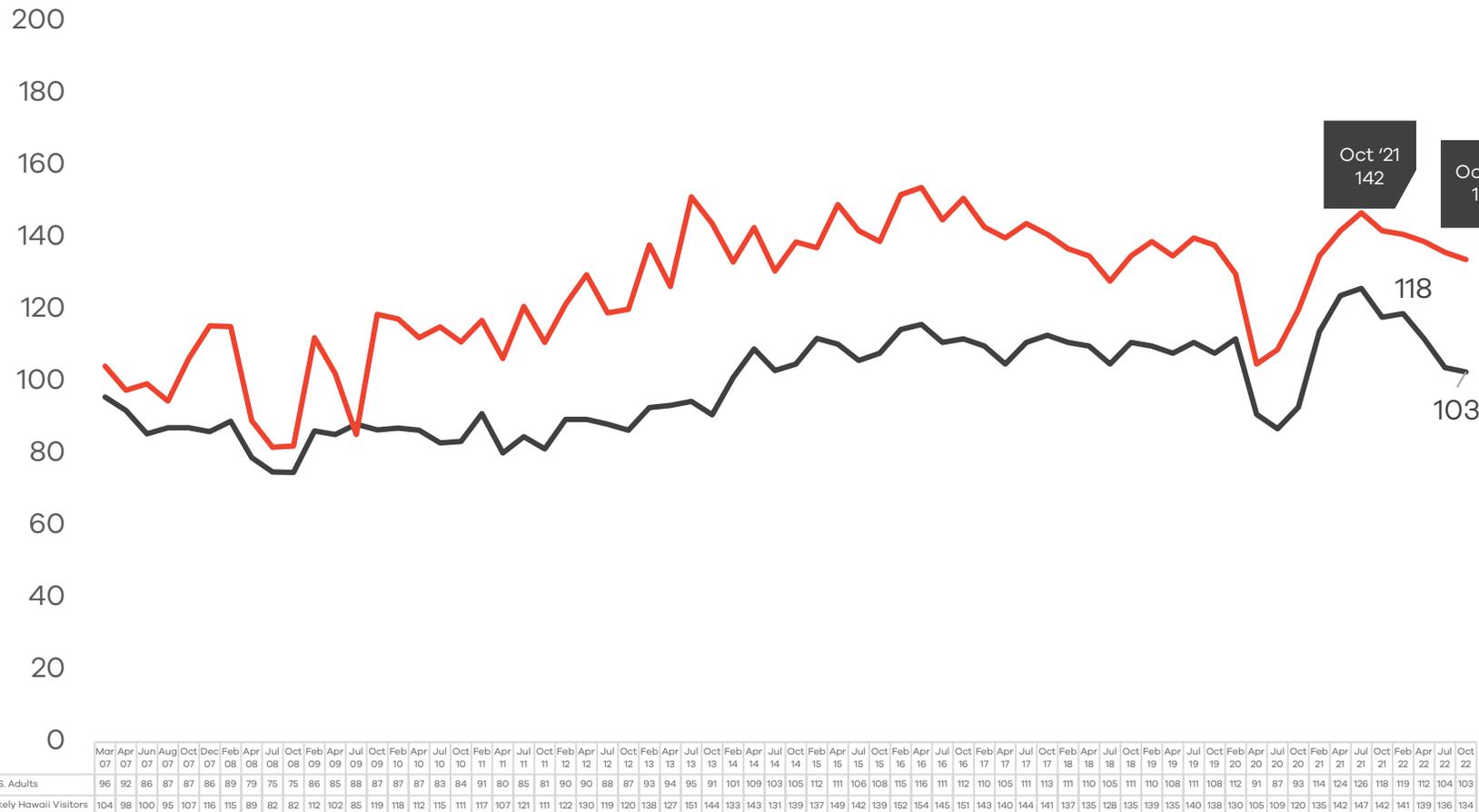
Traveler Intentions: Over Time

Data in bold indicates a significant difference from October 2021.

Base: Likely to Visit Hawaii (n=786)

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

# Overall Traveler Sentiment Score: Down from One Year Ago

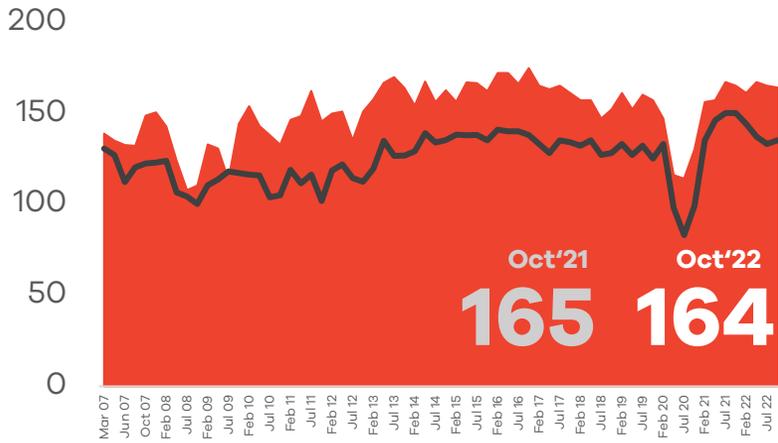


The Traveler Sentiment Score consists of six variables, including: interest in travel, time available for travel, personal finances available for travel, affordability of travel, quality of service and safety of travel. It provides a glimpse into how U.S. adults are feeling about travel this year compared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

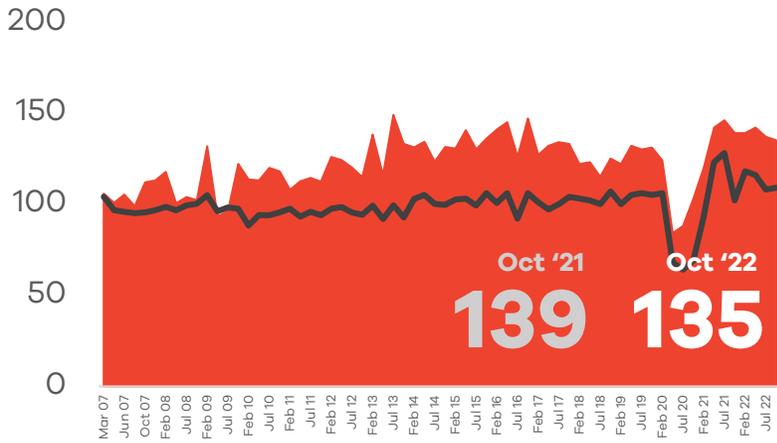
Traveler Sentiment Index™

# Affordability of Travel Displayed The Largest Decrease From 2021

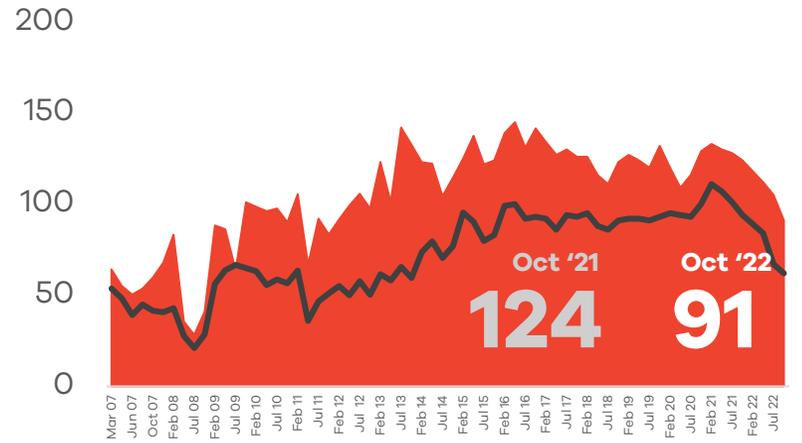
## Interest in Travel



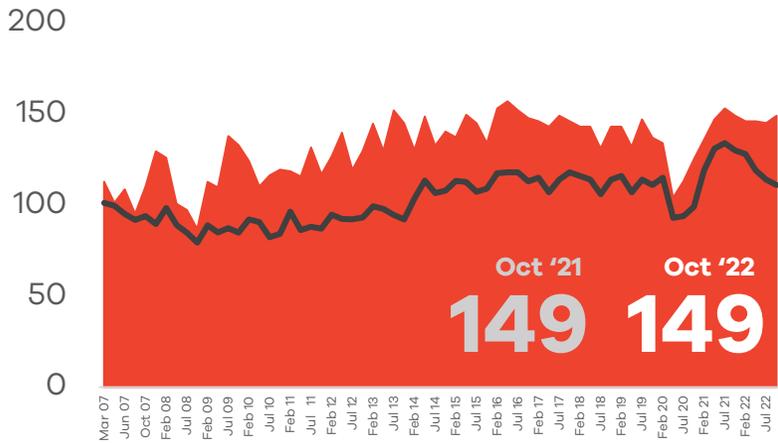
## Perceived Safety of Travel



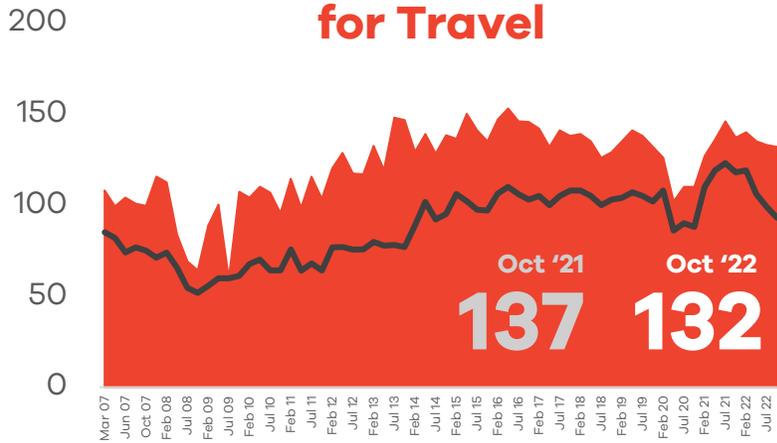
## Affordability of Travel



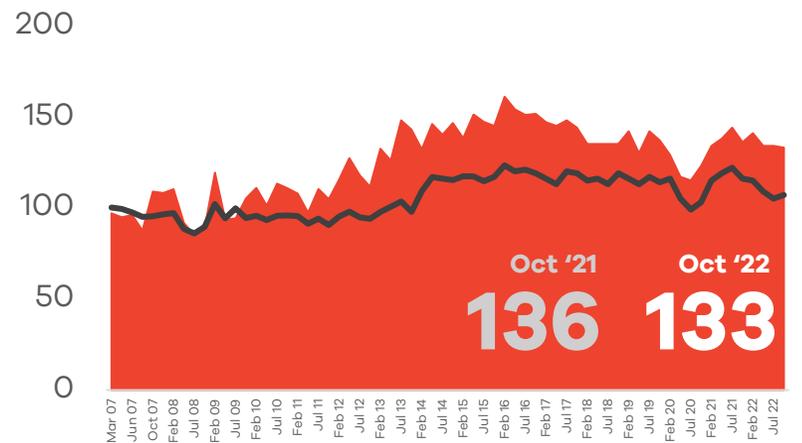
## Time Available for Travel



## Personal Finances Available for Travel



## Quality of Service of Travel



Traveler Sentiment Index™

**Base:** U.S. Adults (n=4,529) (Black line) & Likely to Visit Hawaii w/o Air Travel (n=1,449) (Red fill)  
**Source:** MMGY Global's travelhorizons™/2022 Portrait of American Travelers® "Winter Edition"



# TRAVEL OUTLOOK SNAPSHOT SUMMARY

## KEY TAKEAWAY:

- Travel intentions are down slightly and we're seeing spending intentions of Likely Hawaii Visitors up significantly from this time last year. They plan to take an average of 4.8 trips this year and spend an average of \$6,163 during that time.
- The overall Traveler Sentiment Score of these travelers stands at 134, down 8 points from this time last year. Although all components displayed decreases or remained the same from last year, the perceived affordability of travel displayed the largest decrease, down 33 points, followed by personal finances available for travel, down 5 points.

## WHAT IT MEANS:

With perceived affordability of travel decreasing significantly, Likely Hawaii Visitors continue to show signs that rising costs of travel and inflation are impacting them. Despite this, many of these travelers are still planning to travel and spend money on travel.

# Barriers to Travel

# Significantly More of Those Likely to Visit Hawaii Perceive Traveling by Personal Car, Visiting Friends and Family, and Staying in a Hotel, Resort, or Vacation Rental to be Safer Compared to Last Year.

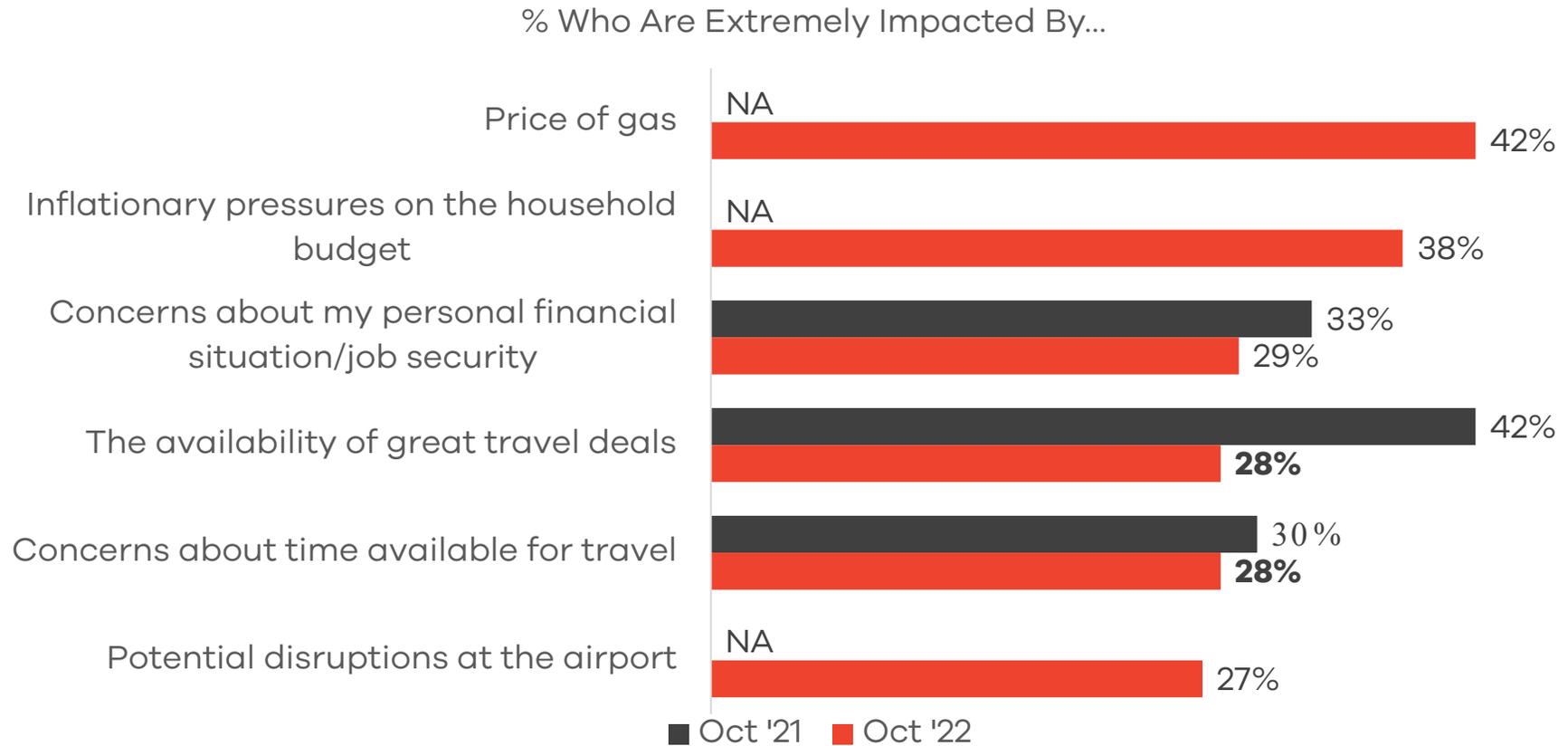
% Who Perceive Each Travel Aspect To Be Safe	Oct '21	Oct '22
Traveling by personal car	81%	<b>87%</b>
Visiting friends and family	80%	<b>87%</b>
Staying in a hotel or resort	76%	<b>84%</b>
Staying in a vacation rental	73%	<b>82%</b>
Going to a beach	78%	80%
Going to a park	76%	80%
Taking a domestic flight	71%	<b>80%</b>
Taking an overnight domestic trip	74%	78%
Visitors coming to my city or town from outside the local area	63%	<b>73%</b>
Taking an overnight international trip	63%	66%
Participating in snow sports	65%	65%
Visiting a theme or amusement park	62%	65%
Attending a sporting event	60%	64%
Taking a river cruise	62%	62%
Attending a conference or convention	58%	62%
Attending a concert/festival	57%	60%
Taking an ocean cruise	60%	56%

Data in bold indicates a significant difference from October 2021.

Base: Likely to Visit Hawaii (n=786)

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

# Likely Hawaii Visitors Are Concerned About The Price of Gas And Inflationary Pressures When Planning Travel.



Barriers To Travel

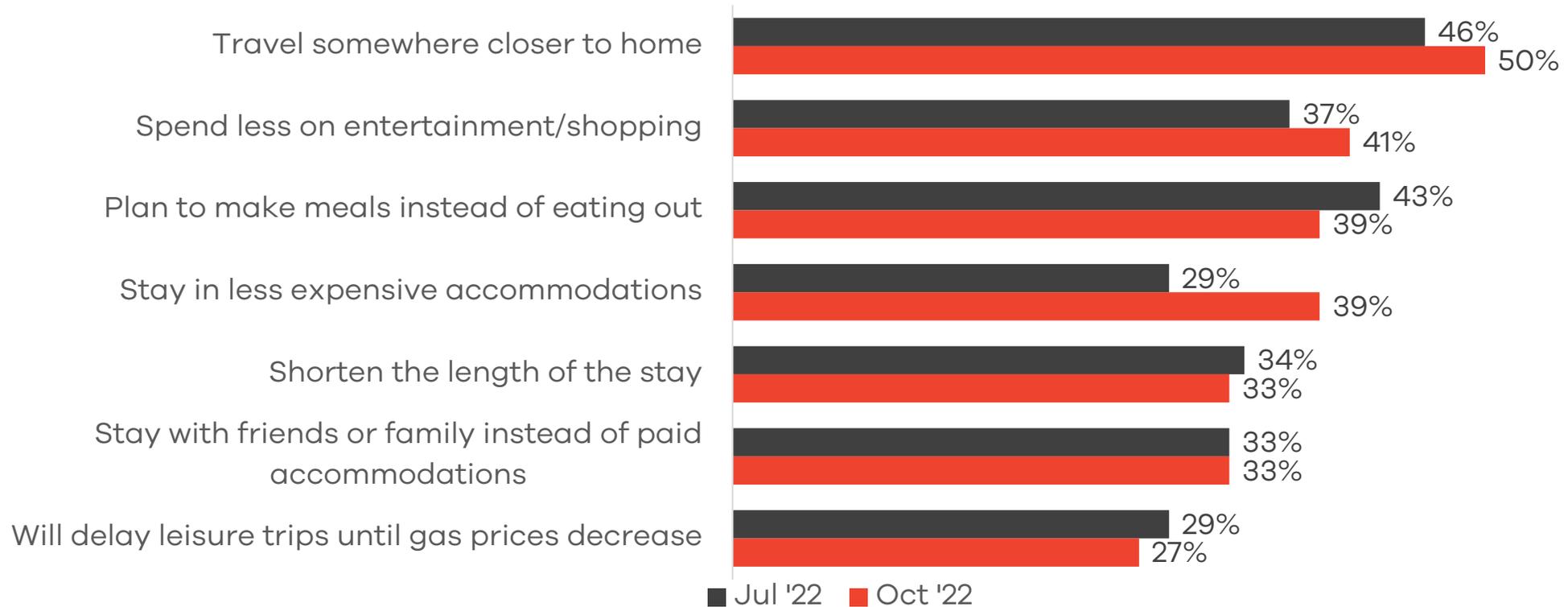
Data in bold indicates a significant difference from October 2021.

Base: Likely to Visit Hawaii (n=786)

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

# Likely Hawaii Visitors Impacted By Gas Prices Say They Will Travel Somewhere Closer To Home, Followed By Spending Less On Entertainment And Shopping And Plan To Make Meals Instead Of Eating Out.

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=631)

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



# BARRIERS TO TRAVEL SUMMARY

## KEY TAKEAWAY:

- Perceptions around the safety of travel are continuing to improve with significantly more of those Likely to Visit Hawaii perceiving traveling by personal vehicle, visiting friends and family, and staying in hotels or vacation rentals to be safer than last year.
- When planning travel, more than a third of Likely Hawaii Visitors are impacted by the price of gas and inflationary pressures on the household budget, while fewer are concerned about COVID-19.

## WHAT IT MEANS:

While concerns around COVID-19 continue to decrease, we're seeing more concerns around rising costs of travel and personal finances. This is already starting to impact how Likely Hawaii Visitors are planning to travel but doesn't appear to be stopping them from traveling currently. It will be important to keep an eye on in the future if these high costs and inflation persist.

# Online Travel Agencies

*Winter Module*

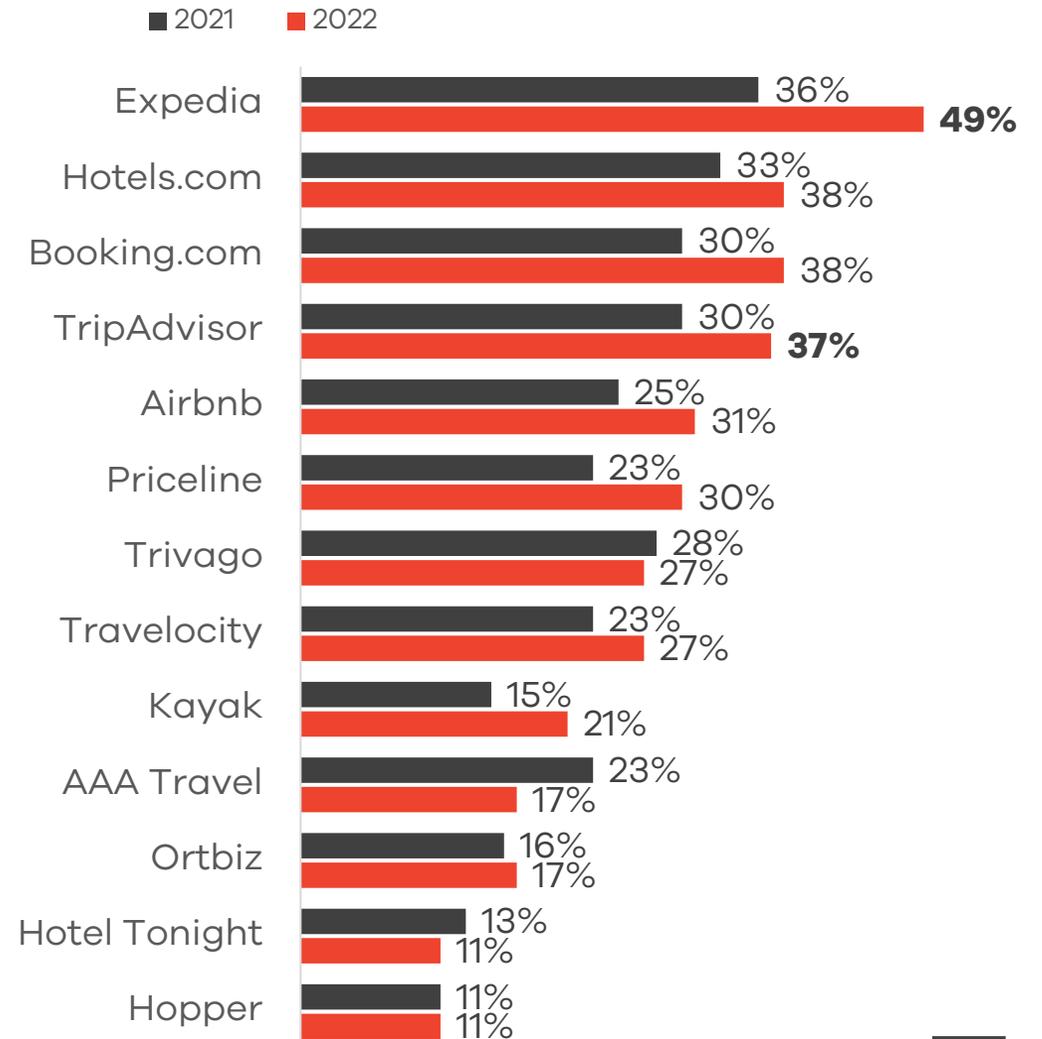


# Online Travel Agency Usage



of those likely to visit Hawaii 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 2021.

Base: Likely to Visit Hawaii (n=786)

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



# Likely Hawaii Visitors Are Predominantly Using OTAs to Compare Prices and Availability.

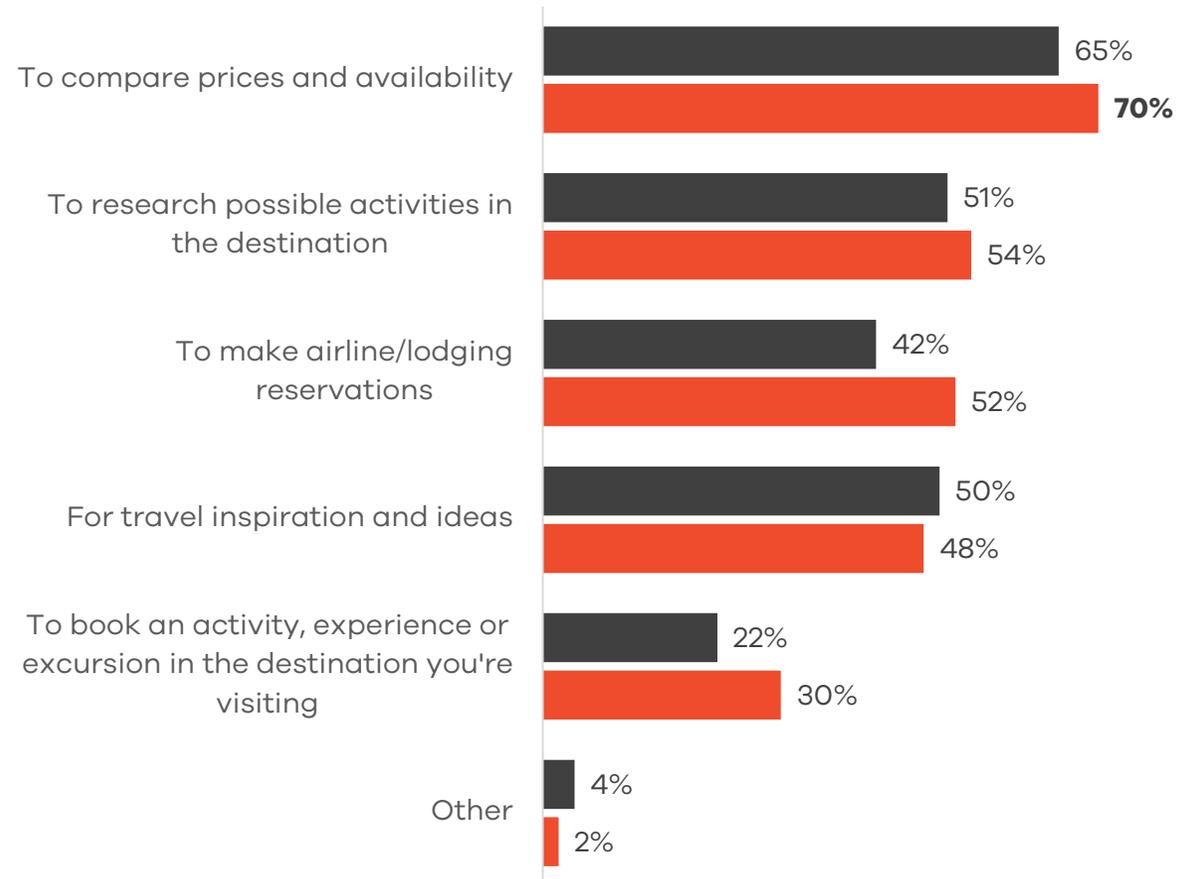
Data in bold indicates a statistically significant difference from 2021.

Base: Used an OTA and Likely to Visit Hawaii (n=689)

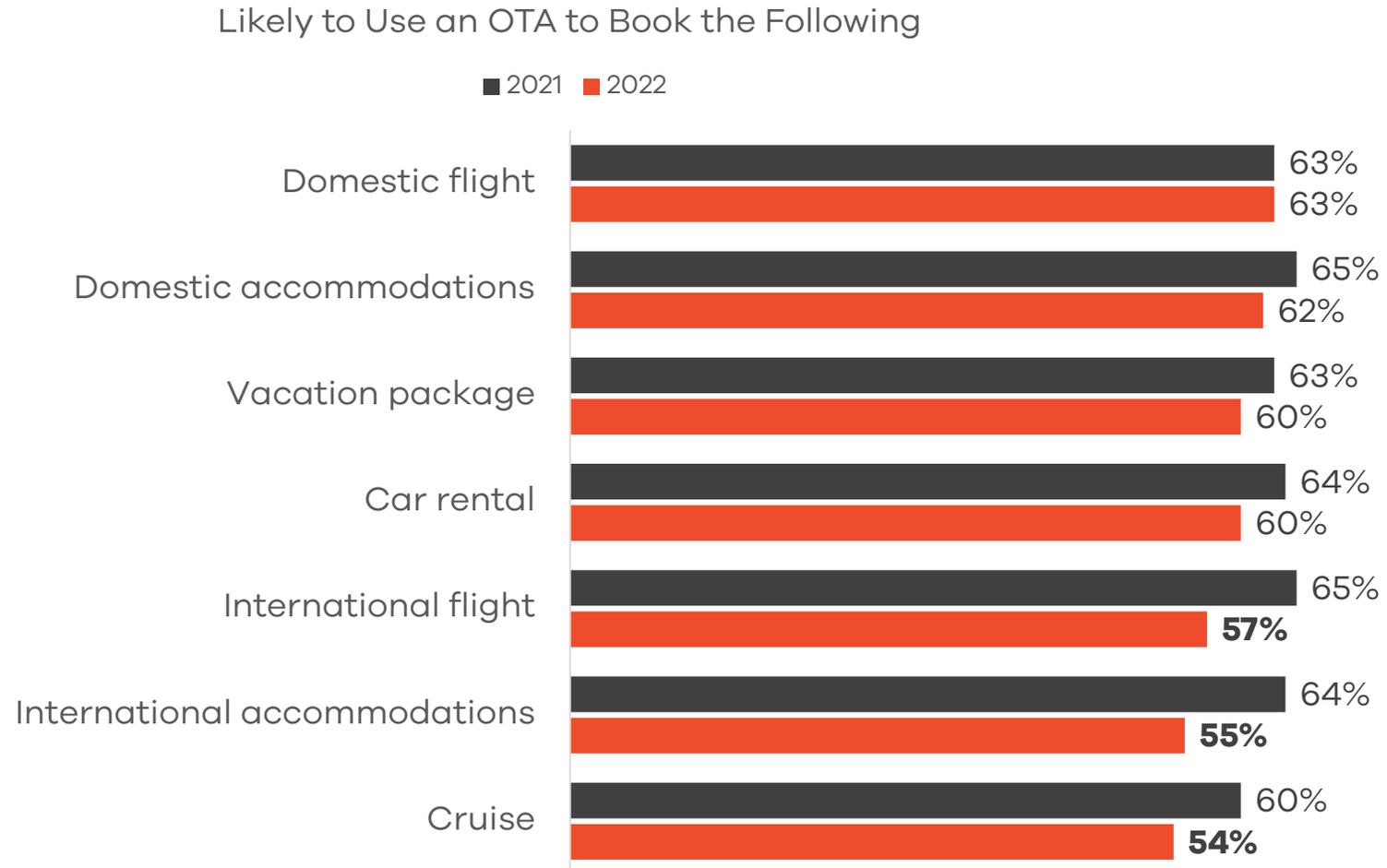
Source: MMGY Global's 2022 *Portrait of American Travelers* "Winter Edition"

## Reasons to Visit an Online Travel Agency Website/App

■ 2021 ■ 2022



# Those Likely to Visit Hawaii Are Most Likely to Use OTAs to Book Domestic Accommodations, Domestic Flights and Vacation Packages.



Data in bold indicates a statistically significant difference from 2021.

Base: Likely to Visit Hawaii (n=786)

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

# Reasons for Booking Using an OTA

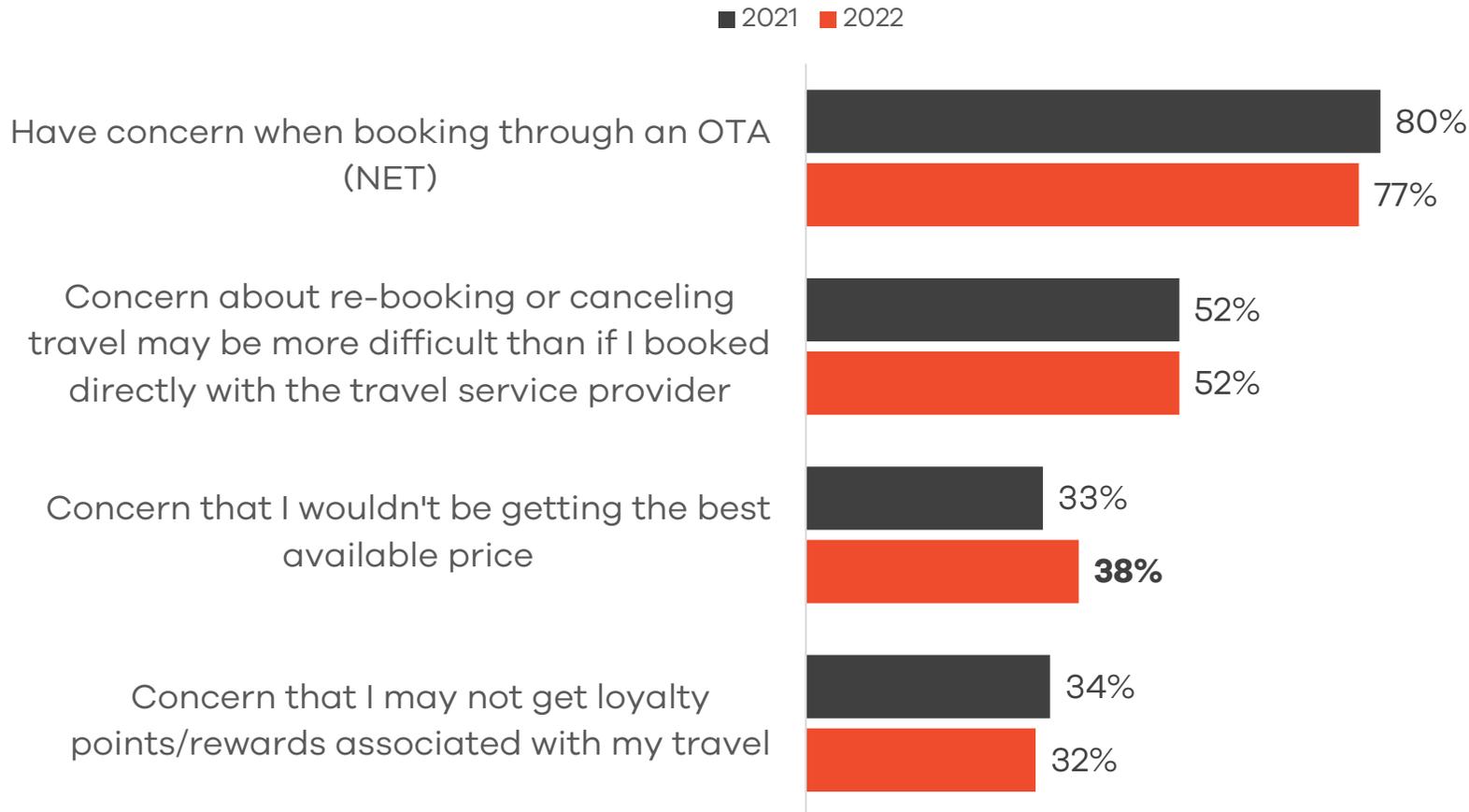
	Oct '21	Oct '22
Convenience of being able to compare multiple options	49%	<b>62%</b>
These sites/apps are where I can get the best price	45%	50%
These sites/apps are just the first place I think to go when planning travel	39%	38%
I prefer the user experience of these sites/apps over other planning or booking sites	35%	34%
I get loyalty member perks for booking through these sites/apps	34%	33%
These sites/apps are most familiar to me because of their advertising campaigns	35%	32%
Other	2%	2%

**Base:** Likely Hawaii Travelers who are likely to book using an OTA (n=640)  
**Source:** MMGY Global's 2022 *Portrait of American Travelers*® "Winter Edition"



# Eight in 10 Travelers Likely to Visit Hawaii Have at Least One of the Following Concerns When Booking with an OTA.

Concerns When Booking With an OTA



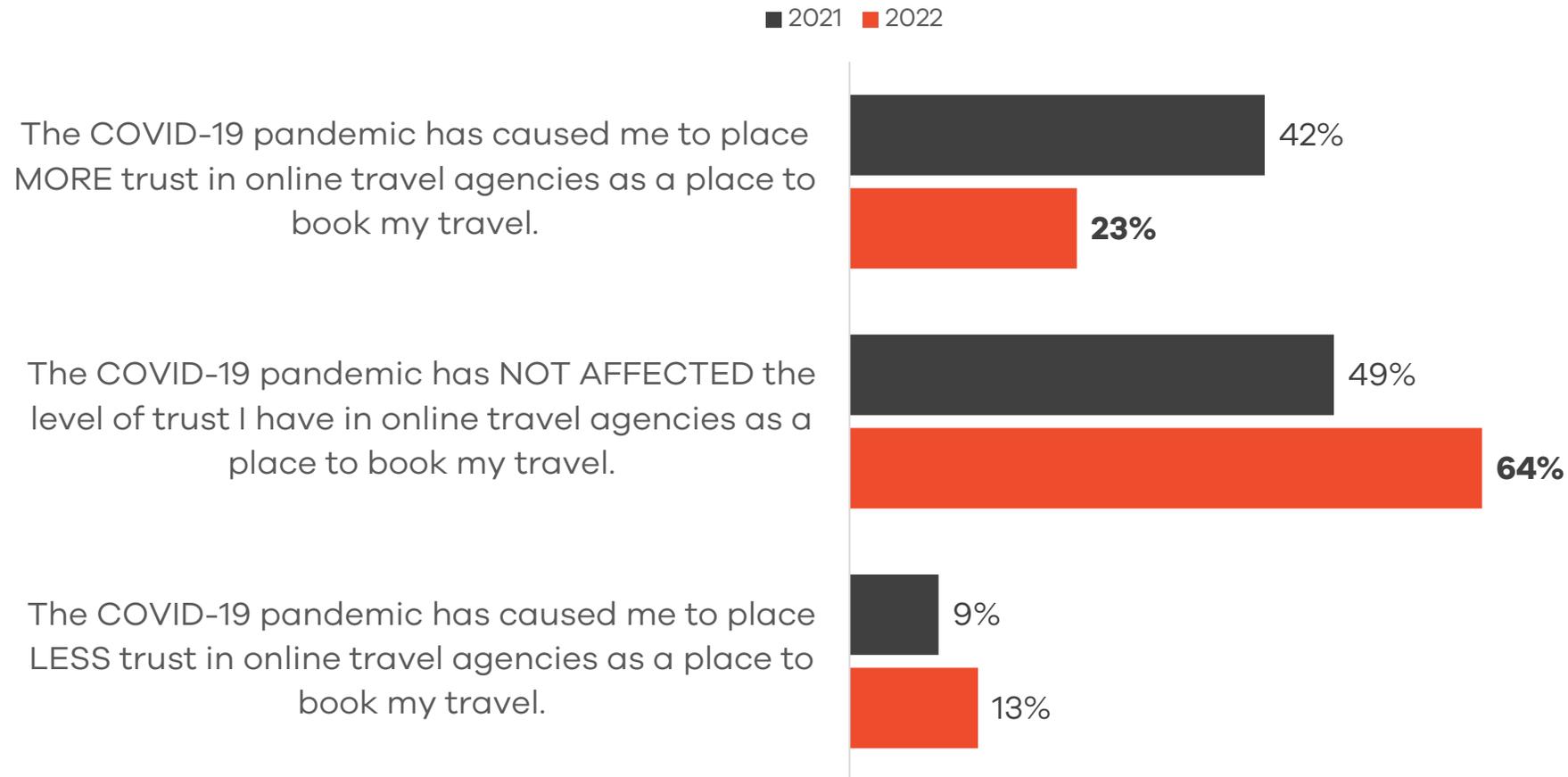
- / Compared to last year, a similar percentage of travelers have concerns when booking through an OTA.
- / Significantly more of those Likely to Visit Hawaii are concerned about finding the best available price compared to this time last year.

Base: Likely to Visit Hawaii (n=786)

Source: MMGY Global's 2022 *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 2021.

**Base:** Likely to Visit Hawaii (n=786)

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

# ONLINE TRAVEL AGENCIES SUMMARY

## KEY TAKEAWAY:

- Eighty-eight percent of those Likely to Visit Hawaii use at least one online travel agency (OTA) on a regular basis when researching or booking travel, a similar percentage as those who reported doing so in 2021 (91%). Expedia (49%), Hotels.com (38%), Booking.com (38%) and TripAdvisor (37%) are the most popular sites among those Likely to Visit Hawaii, with significantly more using Expedia and TripAdvisor compared to last year.
- These travelers are most likely to use an OTA to book domestic flights (63%) and accommodations (62%), and they are doing so for the convenience of comparing multiple options (62%) and because they believe these sites offer the best prices (50%).
- Eight in 10 of those Likely to Visit Hawaii have concerns about booking with an OTA (77%), including concerns that canceling or re-booking may be more difficult than if they had booked directly with the travel service provider (52%) or concerns that they aren't getting the best available price (38%).

## WHAT IT MEANS:

- Despite having some concerns when booking travel through an OTA, those Likely to Visit Hawaii are still using OTAs to research and book travel and are doing so at a similar rate as last year.

# Brand Loyalty

*Winter Module*

# Marriott, Hilton and Hyatt are the Most Popular Hotel Brands Among Those Likely to Visit Hawaii.

Hotels Would Consider for Future Leisure Trip	Oct '21	Oct '22
Marriott	46%	<b>61%</b>
Hilton	48%	<b>60%</b>
Hyatt	35%	<b>52%</b>
Holiday Inn	34%	<b>44%</b>
Hilton Garden Inn	36%	<b>43%</b>
Ritz Carlton	30%	<b>38%</b>
Hampton	33%	37%
Wyndham	25%	<b>36%</b>
Sheraton	34%	35%
Doubletree	26%	<b>32%</b>
Best Western	27%	31%
Comfort Inn	28%	28%
Radisson	21%	<b>27%</b>
Fairfield Inn	23%	25%
Choice Hotels	19%	18%

/ Compared to last year, consideration for Marriott, Hilton, Hyatt, Holiday Inn, Hilton Garden Inn, Ritz Carlton, Wyndham, Doubletree and Radisson have increased.

Base: Likely to Visit Hawaii (n=786)

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

# American Airlines, Delta and United are the Most Popular Airline Brands Among Those Likely to Visit Hawaii.

Airlines Would Consider for Future Leisure Trip	Oct '21	Oct '22
American Airlines	47%	<b>61%</b>
Delta	44%	<b>56%</b>
United	45%	<b>55%</b>
Southwest	40%	<b>50%</b>
JetBlue	34%	34%
Alaska Airlines	28%	<b>36%</b>
British Airways	23%	<b>27%</b>
Virgin Atlantic	23%	23%
Air Canada	23%	22%
Lufthansa	18%	<b>22%</b>

/ Compared to last year, consideration for American Airlines, Delta, United, Southwest, Alaska Airlines, British Airways and Lufthansa have increased.

Base: Likely to Visit Hawaii (n=786)

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

**% Agree: I consider myself to be loyal to ...**

**61%**

**A Hotel Brand  
(Compared to 71% in 2021)**

**63%**

**An Airline  
(Compared to 73% in 2021)**

**50%**

**A Cruise Line  
(Compared to 65% in 2021)**

**46%**

**A Car Rental Brand  
(Compared to 60% in 2021)**

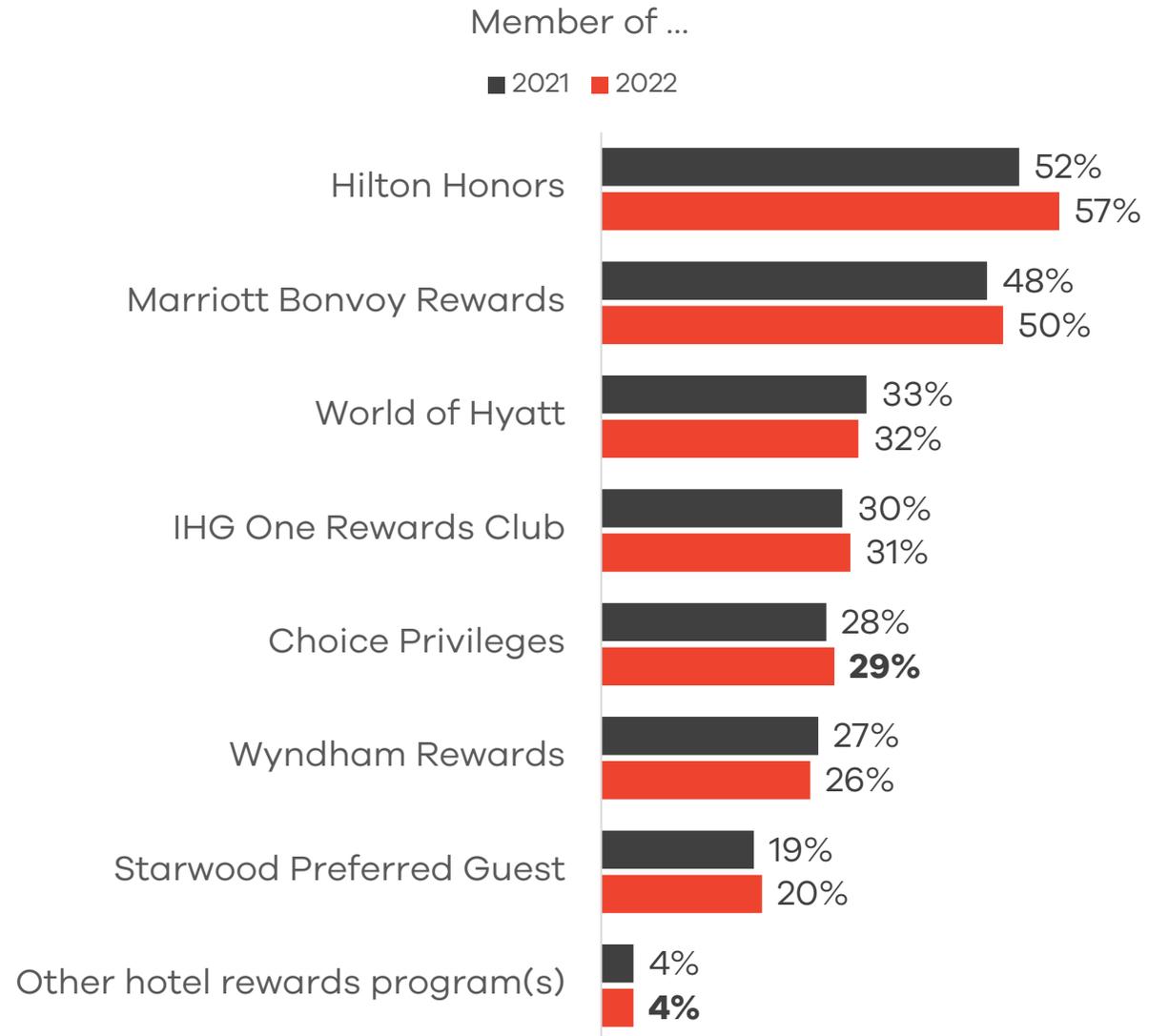
**Base:** Likely to Visit Hawaii (n=786)

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

# Hotel Loyalty Programs

69% 2021      66% 2022

of those Likely to Visit Hawaii are an active member of a hotel brand's loyalty program.



Data in bold indicates a statistically significant difference from 2021.  
**Base:** Likely to Visit Hawaii (n=786); and member of a hotel loyalty program (n=515)  
**Source:** MMGY Global's 2022 *Portrait of American Travelers*® "Winter Edition"

# Consistency in Value, Level of Service and Previous Satisfaction With the Brand Are the Top Influential Factors of Hotel Brand Loyalty.

Influential to Hotel Brand Loyalty

■ 2021 ■ 2022



Data in bold indicates a statistically significant difference from 2021.

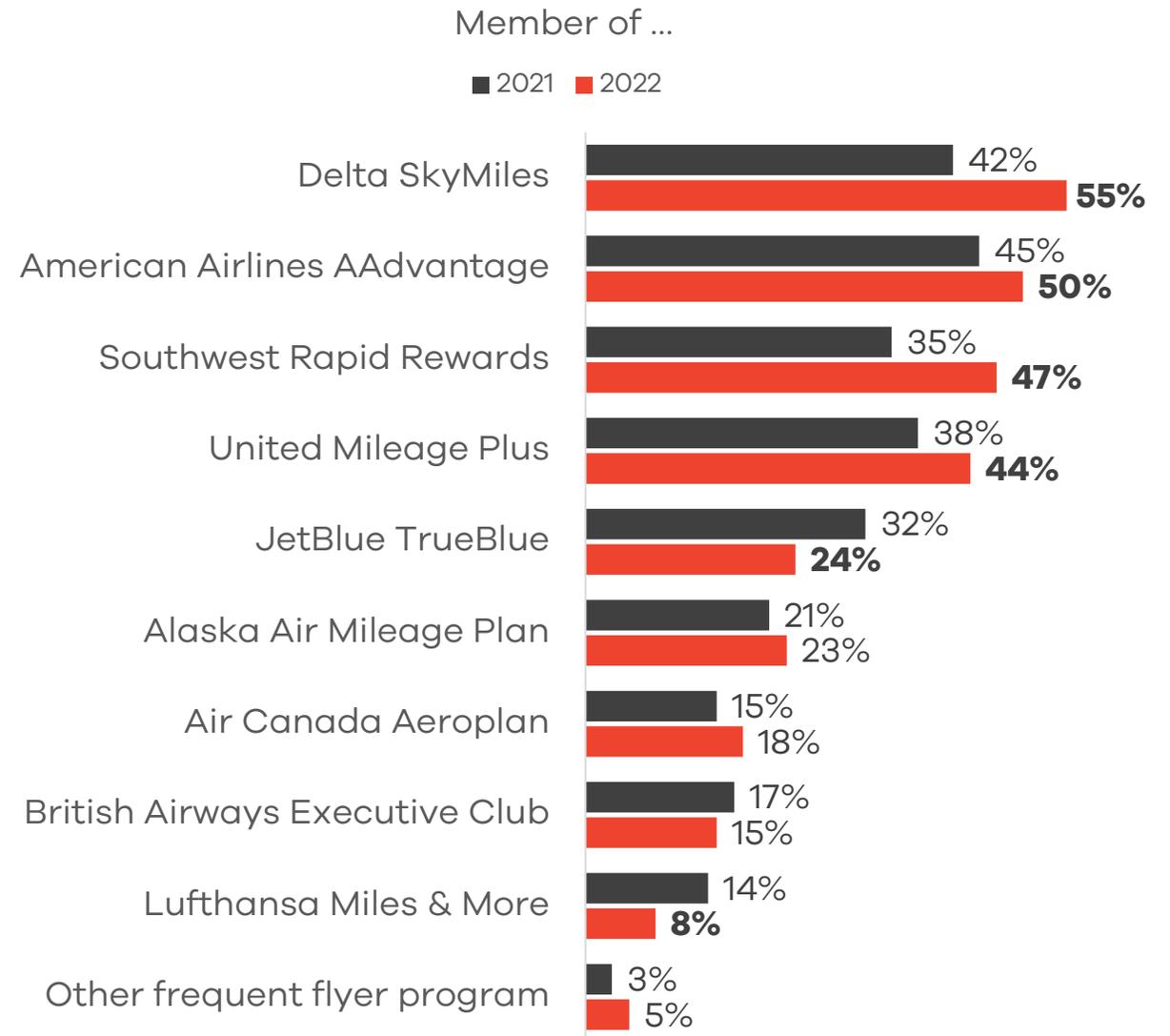
Base: Likely to Visit Hawaii and member of a hotel loyalty program (n=515)

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

# Airline Frequent Flyer Programs

70% 2021      67% 2022

of those Likely to Visit Hawaii are an active member of an airline's frequent flyer program.

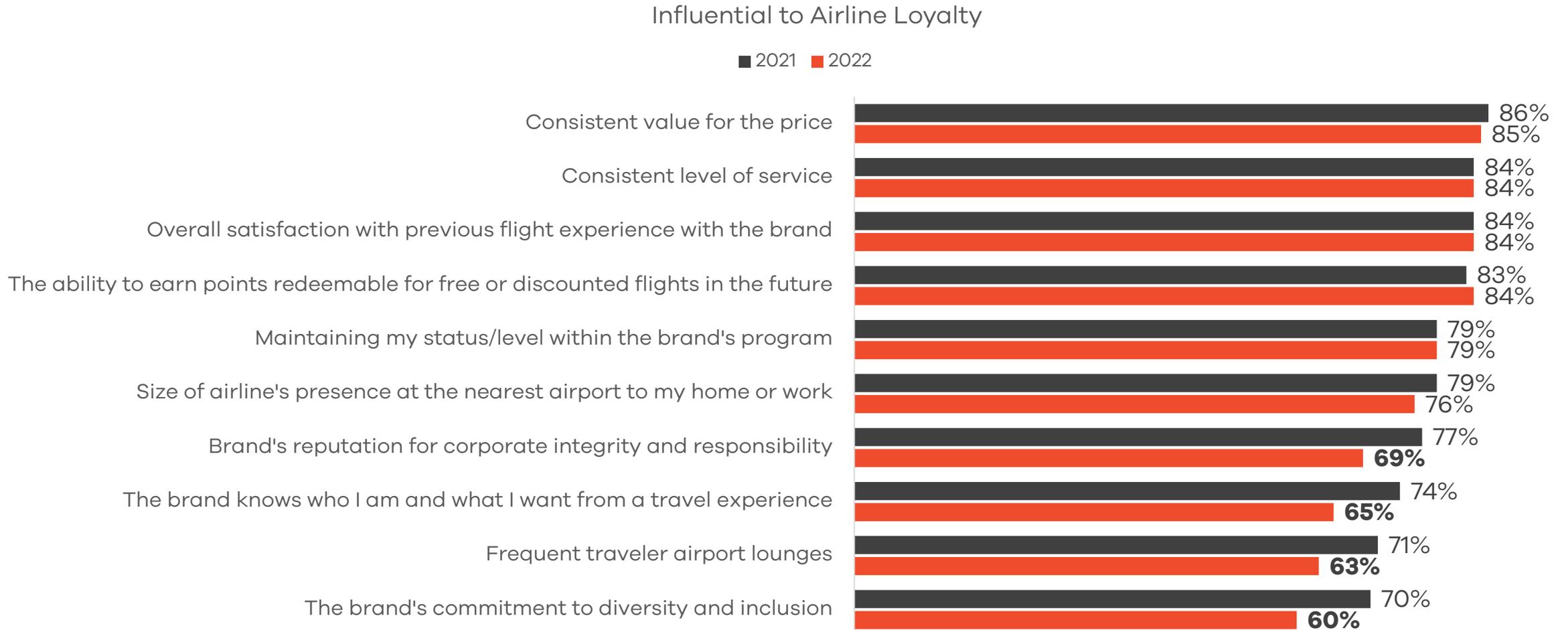


Data in bold indicates a statistically significant difference from 2021.

**Base:** Likely to Visit Hawaii and member of a frequent flyer program (n=526)

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

# Consistency in Value, Level of Service, and Previous Satisfaction With the Brand Are Also the Top Influential Factors of Airline Loyalty.



Data in bold indicates a statistically significant difference from 2021.

**Base:** Likely to Visit Hawaii and member of a frequent flyer program (n=446)

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



# BRAND LOYALTY SUMMARY

## KEY TAKEAWAY:

- More than 6 in 10 of those Likely to Visit Hawaii (61%) indicate they consider themselves to be loyal to a hotel brand, down significantly from last year (71%). Marriott (61%), Hilton (60%) and Hyatt (52%) garner the most interest among these travelers. Seven in 10 (66%) are active members of at least one hotel loyalty program, with Hilton Honors (57%) and Marriott Bonvoy (50%) displaying the highest popularity. The top influential factors that lead to hotel brand loyalty include consistency in value for the price and level of service as well as overall satisfaction with the brand previously.
- More than 6 in 10 active leisure travelers (63%) indicate they consider themselves to be loyal to an airline, down significantly from last year (73%). American Airlines (61%), Delta (56%), United (55%) and Southwest (50%) garner the most interest among these travelers. Seven in 10 (67%) are active members of at least one airline frequent flyer program, with Delta SkyMiles (55%) and American Airlines AAdvantage (50%) displaying the highest popularity. The top influential factors that lead to airline loyalty include consistency in value for the price and level of service as well as overall satisfaction with previous flight experiences.

A grayscale photograph of a woman on a cruise ship deck. She is wearing a wide-brimmed hat, a striped dress, and sandals, and is leaning against the railing, looking out at the ocean. The deck has a wooden floor and a lifebuoy is visible on the railing. The background shows a vast expanse of water and a distant shoreline under a cloudy sky.

# Cruising

*Winter Module*



77% 2021      74% 2022

of those Likely To Visit Hawaii are interested in taking a cruise vacation during the next two years

**Compared to last year, a similar percentage of travelers likely to visit Hawaii are interested in taking a cruise during the next two years.**

Base: Likely to Visit Hawaii (n=786)

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



**Royal Caribbean, Disney, Carnival, and Celebrity garner the most interest among those likely to visit Hawaii interested in cruising.**

**Base:** Interested in Cruising & Likely to Visit Hawaii (n=581)

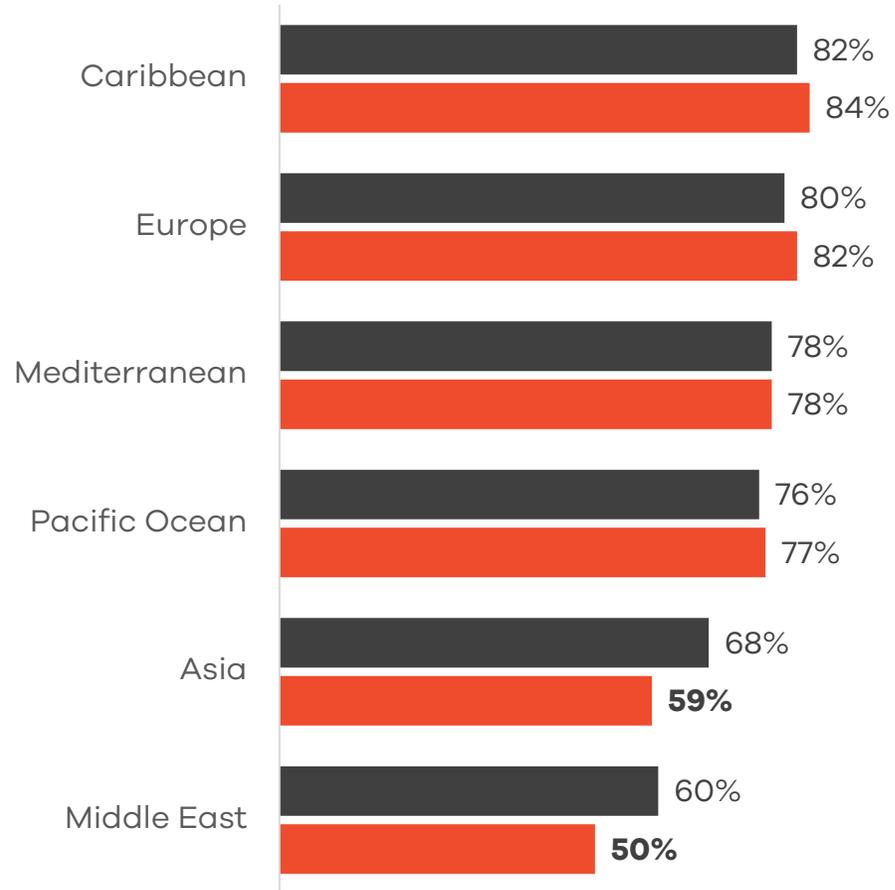
**Source:** MMGY Global's 2021 *Portrait of American Travelers*® Winter Edition

## Interest in Cruise Lines

% Very/Extremely Interested	Oct '21	Oct '22
Royal Caribbean	44%	<b>53%</b>
Disney	36%	<b>44%</b>
Carnival	27%	<b>36%</b>
Princess	25%	<b>36%</b>
Norwegian	25%	<b>33%</b>
Viking	20%	<b>30%</b>
Holland America	22%	<b>27%</b>
Celebrity	26%	23%
SilverSea	13%	<b>18%</b>
Virgin Voyages	17%	17%
Crystal	15%	17%
Seabourn	11%	<b>15%</b>
Windstar	15%	15%
Cunard	10%	10%
Other	1%	2%

Cruising Regions of Interest  
(Somewhat/Extremely Interested)

■ 2021 ■ 2022



49 **Base:** Interested in Cruising & Likely to Visit Hawaii (n=581)

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

**The Caribbean continues to garner the most interest as a cruising destination for those likely to visit Hawaii, followed by Europe and the Mediterranean.**

# Safety/Cleanliness Standards, Cabin Size/Quality, and Quality of Food were the Most Cited Influential Attributes.

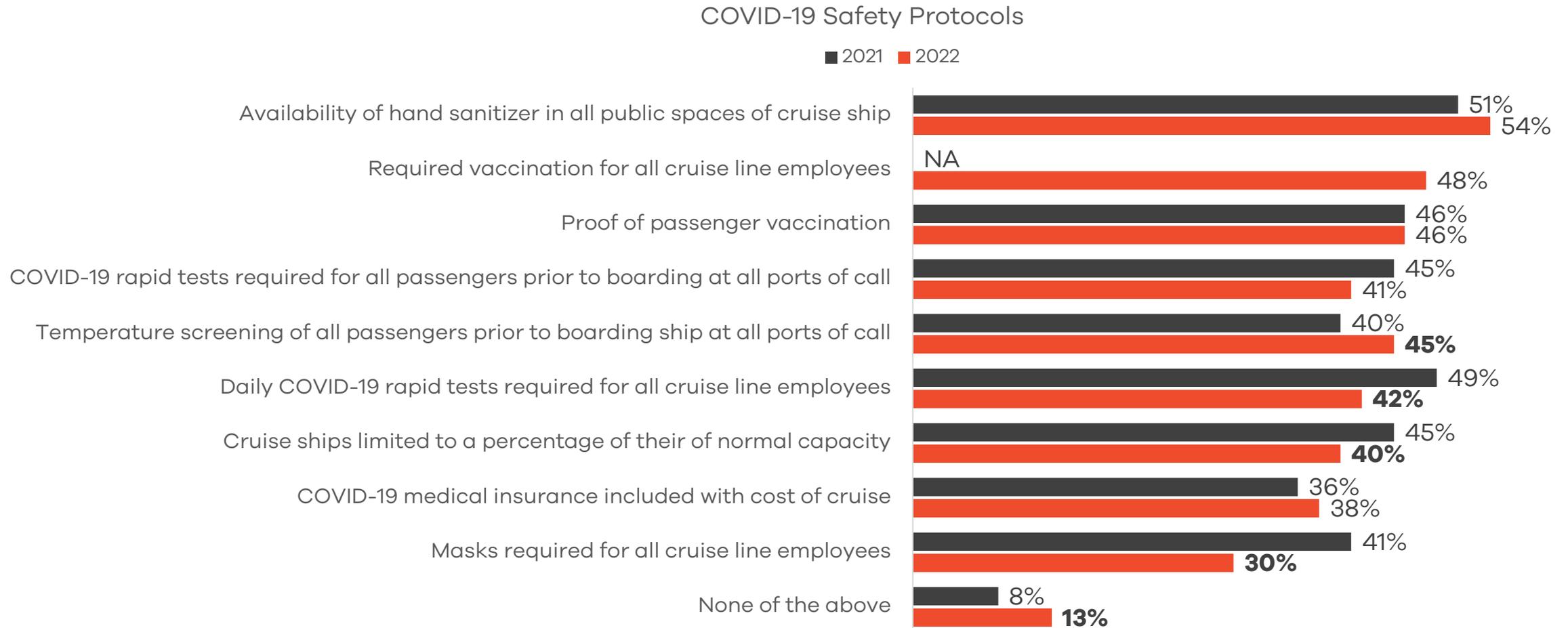
Influential When Selecting a Cruise Line	Oct '21	Oct '22
Safety/Cleanliness standards of cruise ship/brand	80%	83%
Cabin size/quality	78%	82%
Quality of the food available onboard	82%	80%
Price of the cruise	79%	80%
Cruise brand name/reputation	80%	79%
Ports of call/available itineraries	79%	78%
Quality and diversity of excursions available	74%	78%
Previous positive experience with the cruise line	78%	75%
Cost/convenience of traveling to/from port of departure	76%	73%
Nightlife/entertainment options	73%	71%
Luxury accommodations	72%	71%
Proof of vaccination required	74%	67%
Membership in cruise line loyalty program	68%	<b>59%</b>
Availability of onboard gambling	61%	<b>52%</b>
Children's activities	60%	<b>53%</b>

/ Compared to last year, significantly more of those interested in cruising are influenced by membership in a cruise line loyalty program, the availability of onboard gambling, and the presence of children's activities.

**Base:** Interested in Cruising & Likely to Visit Hawaii (n=581)

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

# Compared to Last Year, More Travelers Request Temperature Screenings of Passengers in Order to Reassure it is Safe to Take a Cruise.



NA- Option was not asked in 2021

Base: Likely to Visit Hawaii (n=786)

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



# CRUISING SUMMARY

## KEY TAKEAWAY:

- More than 7 in 10 of those Likely to Visit Hawaii (74%) are interested in taking a cruise in the next two years, which is slightly down last year (77%). Royal Caribbean (53%), Disney (44%), Carnival (36%) and Princess (36%) garner the most interest among those interested in cruising. The Caribbean (84%), Europe (82%) and the Mediterranean (78%) continue to be the most popular cruising regions of interest. Cruisers are influenced by the safety and cleanliness of the ship/brand (83%), the cabin size/quality (82%) and the quality of food available onboard (80%), .
- Compared to last year, safety protocols required by passengers to reassure them that cruise ships are safe remained about the same. More than half (54%) would like to see the availability of hand sanitizer in all public spaces of the cruise ship, followed by more than 5 in 10 who would like required vaccinations for all cruise line employees (48%) and proof of passenger vaccination (46%).

## WHAT IT MEANS:

- The cruising industry took a large hit during the pandemic and has taken a bit longer to come back compared to other industries because of negative perceptions of safety. Perceptions remain approximately the same as last year, though certain protocols such as mask mandates continue to decrease. This indicates cruising is continuing to bounce back, but the rate has slowed.

An aerial photograph of a tropical resort. In the foreground, a large, well-manicured golf course with several holes is visible. To the right, a curved beach borders a calm lagoon. The background features a dense city skyline with numerous high-rise buildings and a prominent mountain peak in the distance. The text 'Vacation Motivators & Activities' is overlaid in large, bold, orange letters on the left side of the image.

# Vacation Motivators & Activities

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

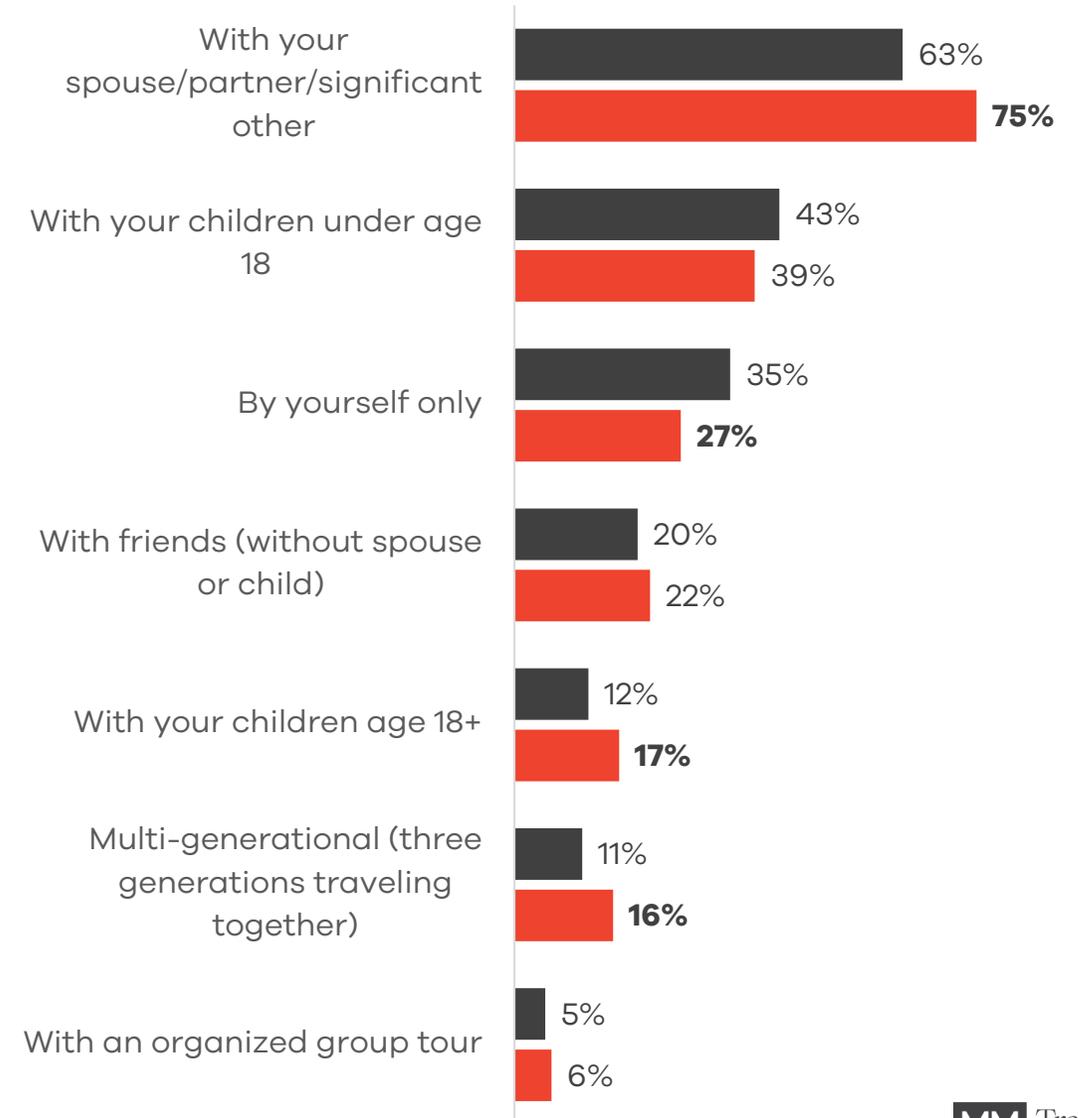
Data in bold indicates a significant difference from October 2021.

**Base:** Likely Hawaii visitors who intend to travel during the next six months (n=715)

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

## Travel Party During Next Six Months

■ Oct '21 ■ Oct '22



# Significantly More Likely Hawaii Visitors Are Planning to Take a Domestic Flight, Visit Friends and Family, Stay in a Hotel/Resort or Vacation Rental, or Travel by Personal Car in The Next 6 Months Than Planned To Do So in October '21.

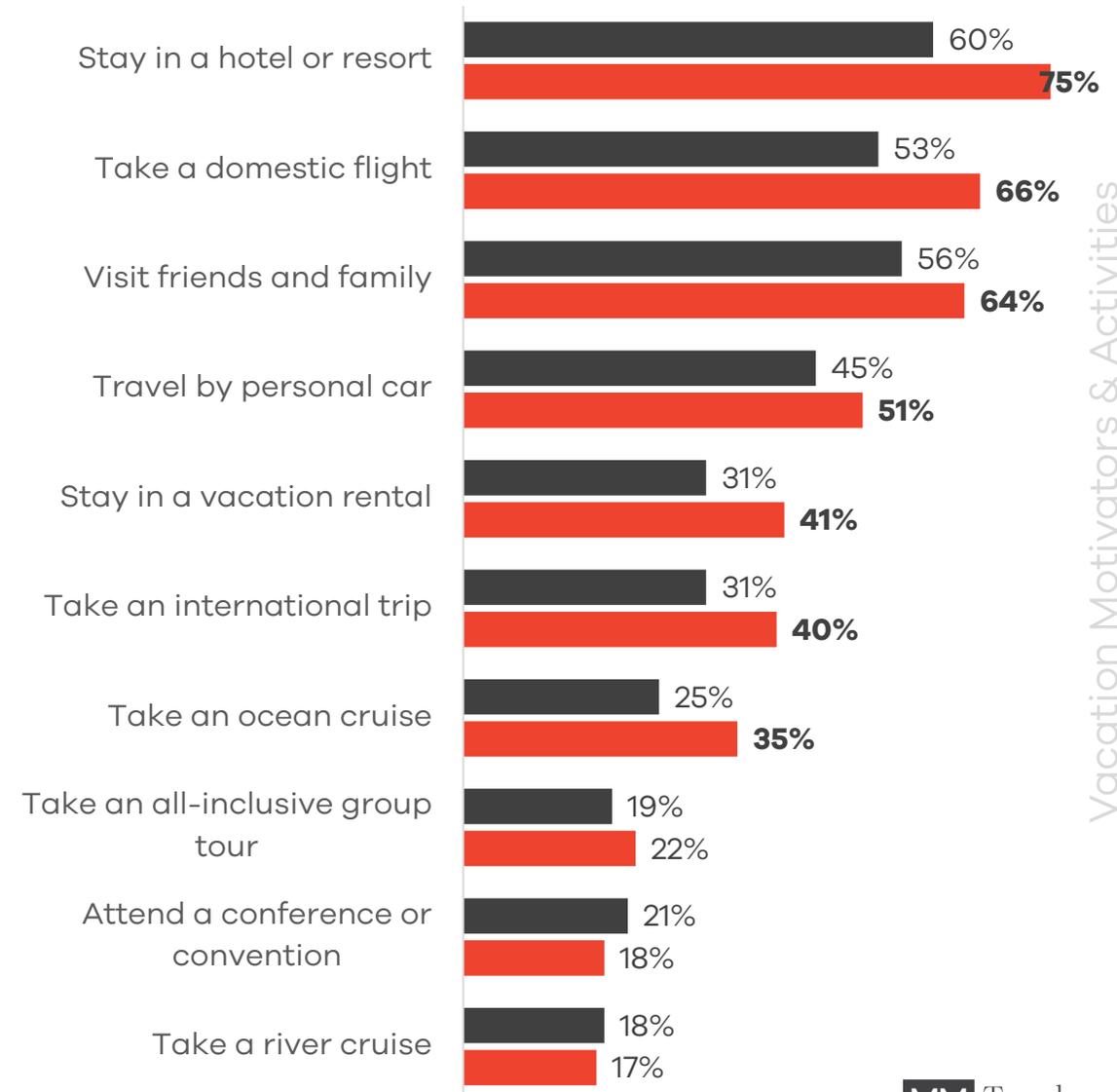
Data in bold indicates a significant difference from October 2021

**Base:** Likely Hawaii visitors who intend to travel during the next six months (n=715)

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

## Travel Expectations in the Next 6 Months

■ Oct '21 ■ Oct '22



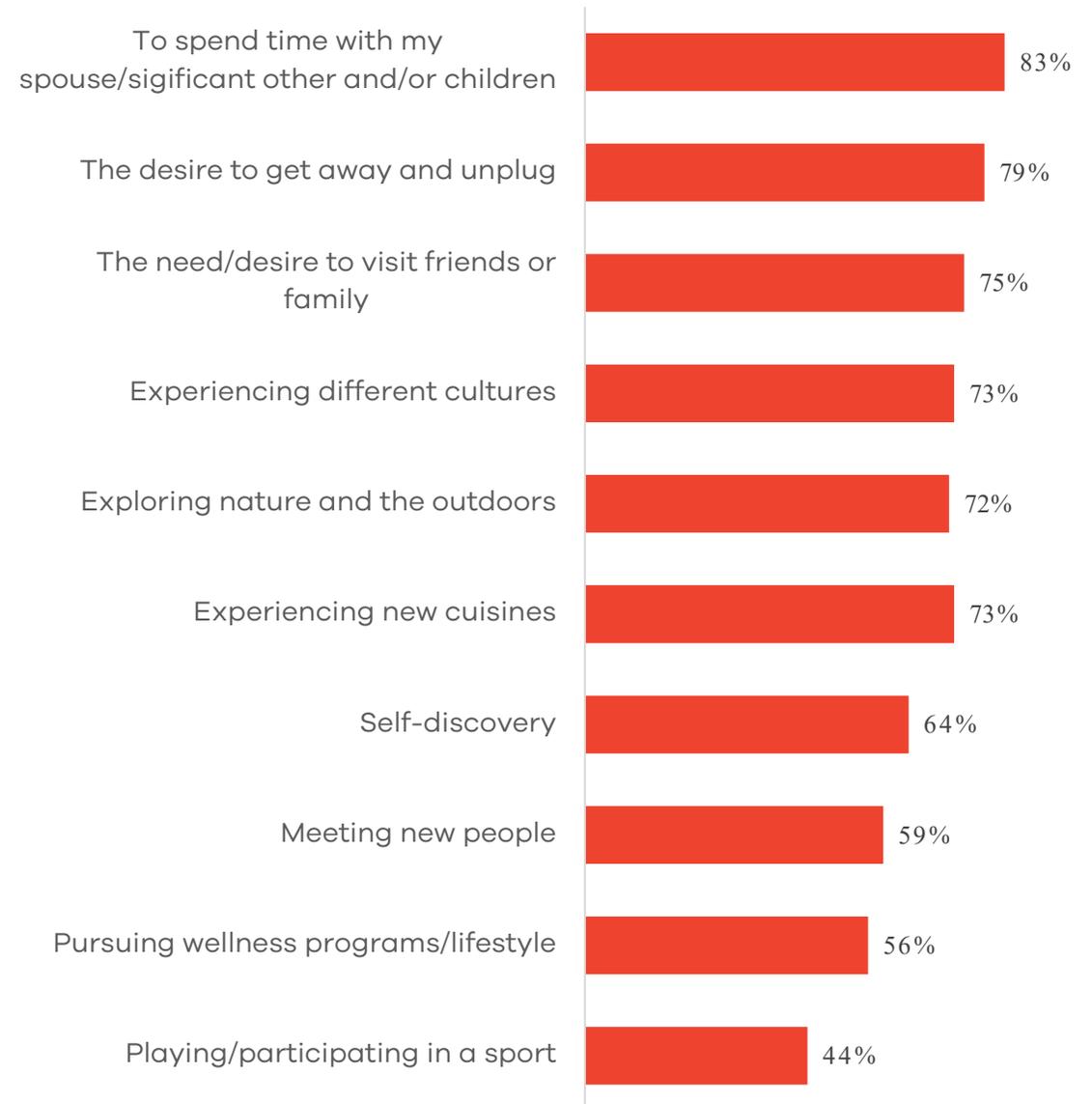
Vacation Motivators & Activities

Spending Time With Significant Other and/or Children, the Desire to Get Away and Unplug, and the Desire to Visit Friends/Family Are The Top Reasons Those Likely to Visit Hawaii Travel.

Base: Likely to Visit Hawaii (n=786)

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

## Vacation Motivators



Vacation Motivators & Activities

# What Destination Attributes Influence Choice of Destination?

Influential When Selecting a Destination	Oct '21	Oct '22
Beautiful scenery	55%	<b>72%</b>
Food and drink scene	49%	<b>61%</b>
Safety	50%	53%
Historical significance of the destination	37%	<b>52%</b>
Outdoor/nature activities	37%	<b>49%</b>
A sense of tradition (place family has traditionally visited)	25%	<b>39%</b>
Focus on family activities	29%	33%
The ethnic diversity and multicultural population of a destination	25%	<b>31%</b>
Music scene	25%	<b>30%</b>
The destination's reputation for environmental responsibility	24%	26%
Nightlife/bars	23%	26%
The destination's commitment to social justice and equality	20%	23%
LGBTQ+ travel offerings	11%	9%

Data in bold indicates a significant difference from October 2021.

/ Beautiful scenery is the top feature travelers look for when selecting a destination. Compared to last year, significantly more likely Hawaii visitors are also influenced by the food and drink scene, the historical significance when selecting a destination, outdoor/nature activities, a sense of tradition, the ethnic diversity of a destination, and the music scene.

# Activities of Interest on Vacation

	Oct '21	Oct '22
Beach experiences	43%	<b>53%</b>
Historical sites	37%	<b>49%</b>
Shopping	38%	<b>48%</b>
Visiting a museum	32%	<b>48%</b>
Visiting a state or national park	35%	<b>47%</b>
Visiting notable architectural sites	30%	<b>40%</b>
Visiting a zoo or aquarium	NA	39%
Hiking/climbing/biking/other outdoor adventures	27%	<b>39%</b>
Visiting a theme or amusement park	28%	<b>38%</b>
Dining Cruise (2022+)	NA	37%
Guided tours with access to local experiences that are otherwise inaccessible	26%	<b>35%</b>
Adventure travel	25%	<b>35%</b>
Attending a concert/music festival	23%	<b>33%</b>
Nightlife	27%	<b>32%</b>
Exploring family's ancestry/past on a heritage vacation	24%	<b>30%</b>
Dinner Theatre (2022+)	NA	30%
Spa services	23%	<b>29%</b>
Attending a sporting event	19%	<b>27%</b>
Casino gambling	23%	26%
Camping (2022+)	NA	26%
Water sports	22%	24%
Attending performing arts events	17%	<b>24%</b>
Film/art festivals	22%	21%
Snow skiing/snowboarding	14%	<b>19%</b>
Playing golf	19%	17%
Scuba diving	15%	17%
Playing tennis	13%	13%
Surfing	11%	13%

/ Beach experiences, historical sites, shopping, and visiting a museum are the top activities of interest among likely Hawaii visitors on vacation.

/ Many activities are of significantly greater interest compared to last year, including interest in beach experiences, historical sites, shopping, visiting a museum, visiting a state or national park, and visiting notable architectural sites.

Data in bold indicates a significant difference from October 2021.

Base: Likely to Visit Hawaii (n=786)

Source: MMGY Global's 2022 *Portrait of American Travelers* "Winter 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. 8 in 10 of these travelers are planning to travel with their significant other while 4 in 10 plan to travel with their children. Compared to October '21, significantly more of these travelers plan to travel within the next 6 months across a variety of categories, most notably to stay in a hotel or resort, take a domestic flight, and/or visit friends and family.
- Likely Hawaii Visitors are taking vacations to spend time with their significant others and/or children, spend time with family, and to unplug. They're influenced by a destination's beautiful scenery, food and drink scene, and perceived safety. On vacation they're most interested in beach experiences, visiting historical, shopping, and visiting museums.

# Destinations of Interest

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

Top 20 States of Interest	Oct '21	Oct '22
California	76%	<b>71%</b>
Florida	75%	<b>70%</b>
Colorado	67%	68%
Alaska	67%	67%
New York	66%	66%
Washington	59%	60%
Arizona	64%	<b>57%</b>
Texas	62%	<b>57%</b>
Nevada	60%	56%
Tennessee	55%	<b>49%</b>
Massachusetts	54%	<b>48%</b>
Oregon	53%	<b>48%</b>
Georgia	52%	48%
Montana	51%	48%
North Carolina	60%	<b>47%</b>
Maine	57%	<b>47%</b>
South Carolina	55%	<b>45%</b>
Wyoming	53%	<b>45%</b>
Louisiana	53%	<b>45%</b>
Michigan	49%	45%

Destinations of Interest

Base: Likely to Visit Hawaii (n=786)

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

Data in bold indicates a significant difference from October 2021.

# Other Than Hawaii Destinations, Likely Hawaii Visitors Are Also Interested in Visiting New York City and San Diego.

	Oct '21	Jul '22
Island of Hawai'i (Big Island)	77%	79%
Honolulu, HI (including Waikiki)	76%	77%
Maui, HI	73%	77%
Kaua'i HI	70%	<b>76%</b>
New York City, NY	65%	67%
San Diego, CA	66%	66%
San Francisco, CA	67%	65%
Las Vegas, NV	73%	<b>64%</b>
Florida Keys/Key West, FL	66%	64%
Niagara Falls, NY	59%	61%
Los Angeles, CA	64%	61%
Orlando, FL	67%	<b>60%</b>
Miami, FL	67%	<b>59%</b>
Napa Valley, CA	62%	59%
Washington, DC	61%	59%
New Orleans, LA	65%	<b>58%</b>
Seattle, WA	58%	58%
Tampa, FL	61%	58%
Denver, CO	58%	57%
Palm Springs, CA	61%	57%

Destinations of Interest

Base: Likely to Visit Hawaii (n=786)

Data in bold indicates a significant difference from October 2021.

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

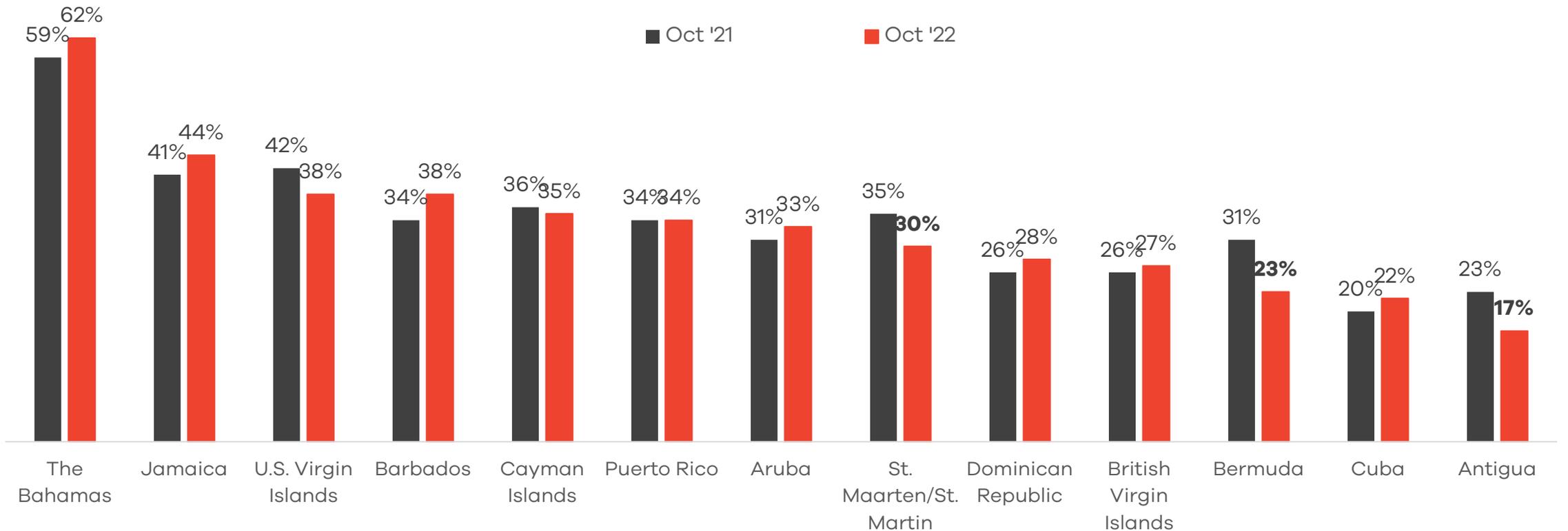
International Destinations of Interest	Oct '21	Oct '22
Europe	40%	<b>51%</b>
The Caribbean	33%	<b>40%</b>
Canada	39%	37%
Mexico	30%	<b>36%</b>
South America	19%	22%
Central America	18%	21%
Asia	18%	21%
Oceania	17%	18%
Middle East	8%	10%
Africa	7%	<b>11%</b>

Data in bold indicates a significant difference from October 2021.

Destinations of Interest

# The Top Caribbean Destinations of Interest Are The Bahamas and Jamaica.

Caribbean Destinations of Interest



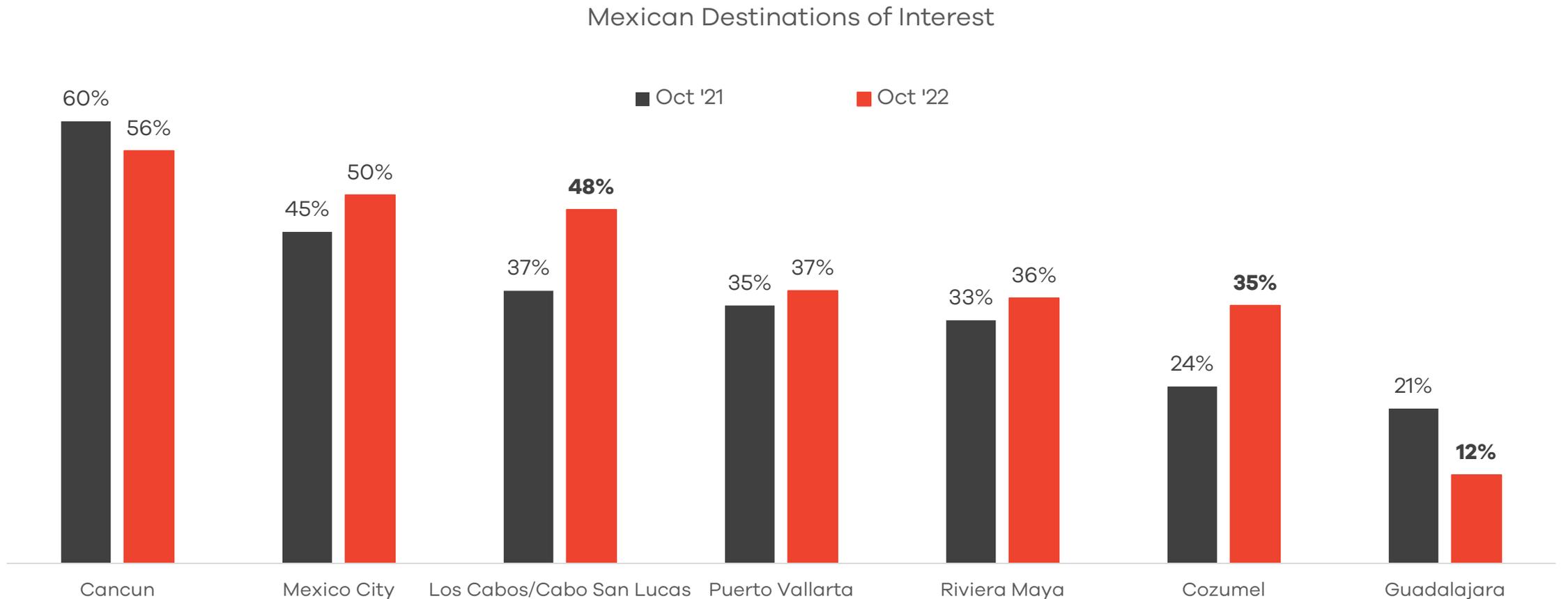
Destinations of Interest

Data in bold indicates a significant difference from October 2021.

**Base:** Likely to Visit Hawaii & Interested in Visiting The Caribbean (n=311)

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

# The Top Mexican Destinations of Interest Are Cancun, Mexico City, and Los Cabos/Cabo San Lucas.

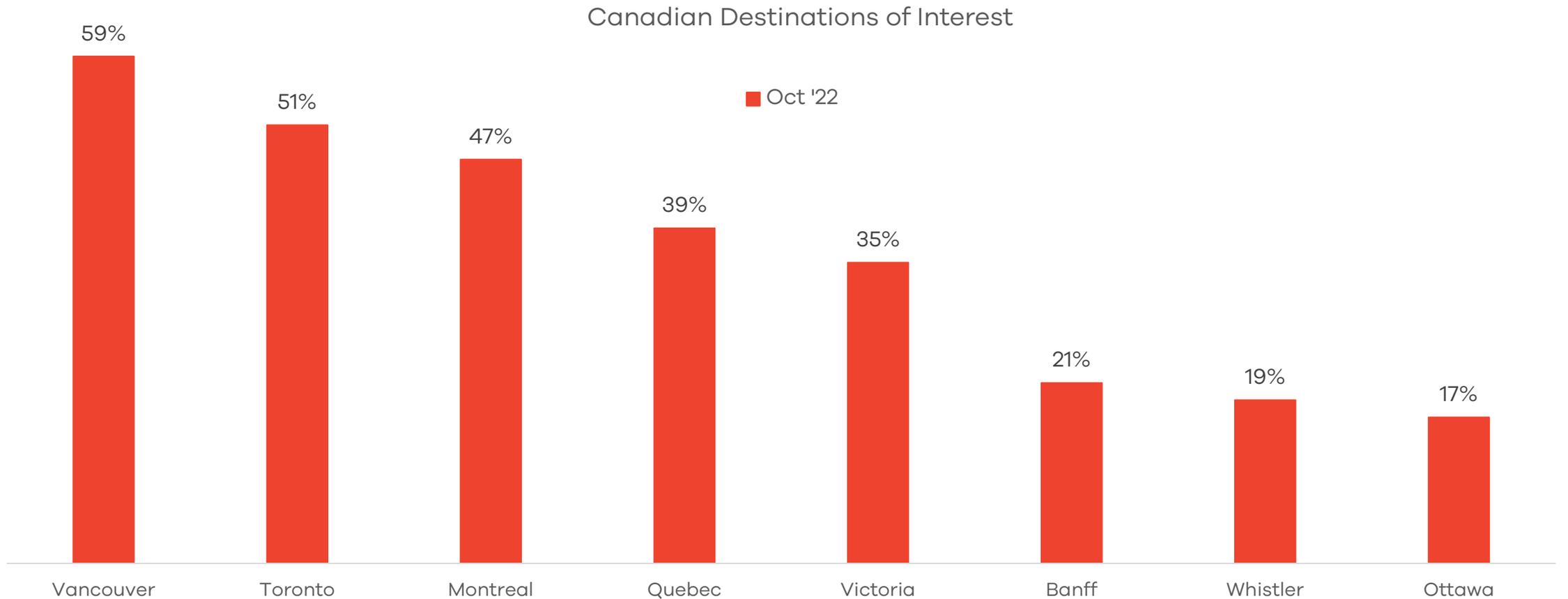


Data in bold indicates a significant difference from October 2021.

**Base:** Likely to Visit Hawaii & Interested in Visiting Mexico (n=283)

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

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



Base: Likely to Visit Hawaii & Interested in Visiting Canada (n=293)

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



THANKYOU

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