



Portrait of
**AMERICAN
TRAVELERS™**

DREDT

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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 4,502 U.S. adults in February 2026.

This report primarily focuses on those *Hawaii Prospects*, defined as those who intend to take at least one overnight leisure trip during the next 24 months, likely to take a domestic flight in the next six months, and interested in visiting Hawaii (4 or 5 on a 5-point scale). There were a total of 1,096 Hawaii Prospects. At the bottom of each slide, the "Base" will detail the audience represented in the data.

Please note: The audience for this report differs from previous Hawaii reports due to sponsor question changes.

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 | 18–25 | 17% |
| Millennials | 26–41 | 29% |
| Gen Xers | 42–57 | 24% |
| Boomers | 58–76 | 28% |
| Silent/GI | 77+ | 2% |



Key Insights

Key Insights

Hawaii Tourism Proprietary Questions

- **Momentum is durable and well distributed across demographics.**
Interest in visiting Hawaii remains high at 66%, while likely domestic flyers in Gen X (78%) and Gen Z/Millennials (76%) lead near-term intent, illustrating the popularity of Hawaii as a domestic destination.
- **Appeal is broad; pricing friction is specific.**
Intent remains high across income tiers (70%–75%), yet airfare (44%), package price (29%) and hotel price (28%) are the clearest reasons prospects reconsider visiting Hawaii. Transparent cost breakdowns and “free” add-ons will help travelers make the most of their spending.
- **Wildfire headwinds continue to be significant.**
Despite over half of travelers saying the Maui fires do not impact their likelihood of visiting (56%), 14% responded that the fires are a reason they are no longer planning to visit. Maintaining respectful updates on recovery, the island’s safety and responsible visitation is key.
- **What prospects want to know is practical and decision-driving.**
Cost breakdowns and best-time-to-visit guidance rank as the most useful information. Lead with fare + hotel + activity cost clarity, seasonal pricing/crowding cues, and island-matching advice to reduce comparison churn.

Traveler Outlook

- **Hawaii prospects outpace the U.S. leisure traveler**
Prospects plan 4.7 trips vs. 3.9 nationally and expect to spend \$7,980 vs. \$5,704 in the next 12 months. Premium positioning with bundled value (activities, dining credits, transfers) would appeal to these affluent prospects.
- **Shorter runway raises the stakes for timely nudges.**
Fifty-five percent expect their next trip within 3 months (vs. 43% U.S.), so time fare sales, availability alerts, and “book-by” messaging inside this 90-day window to convert peak intent.
- **Safety cues still shape conversion.**
Health concerns and perceived international air-travel safety remain elevated – keep safety FAQs, airline/destination updates, and clear disruption policies close to the booking path.
- **Per-trip spend is already higher.**
Average spend per trip skews higher for prospects (~\$1,697 vs. \$1,462), indicating that these travelers likely prefer premium accommodations, activities and in-destination experiences when they go abroad.

Key Insights

Where People Want to Visit

- **Hawaii's islands sit above all mainland options.**
Island of Hawai'i, Maui, Honolulu, and Kaua'i each draw 78–84% interest among prospects; use guided "which island?" tools to match motivations and distribute demand across islands.
- **A tight competitor set defines the real trade-offs.**
California (71%), Colorado (68%) and Florida (67%) lead as alternatives. Contrast Hawaii to these other sunny getaways by marketing "only-in-Hawaii" natural and cultural depth, not just sun and scenery.
- **Top non-Hawaii cities reveal the decision frame.**
Las Vegas (68%), Florida Keys (65%) and San Diego (64%) attract visitors with their sun/entertainment/coastal ease. Highlighting unique experiences like sacred sites, endemic nature, and ocean culture would further set Hawaii apart for all travelers.

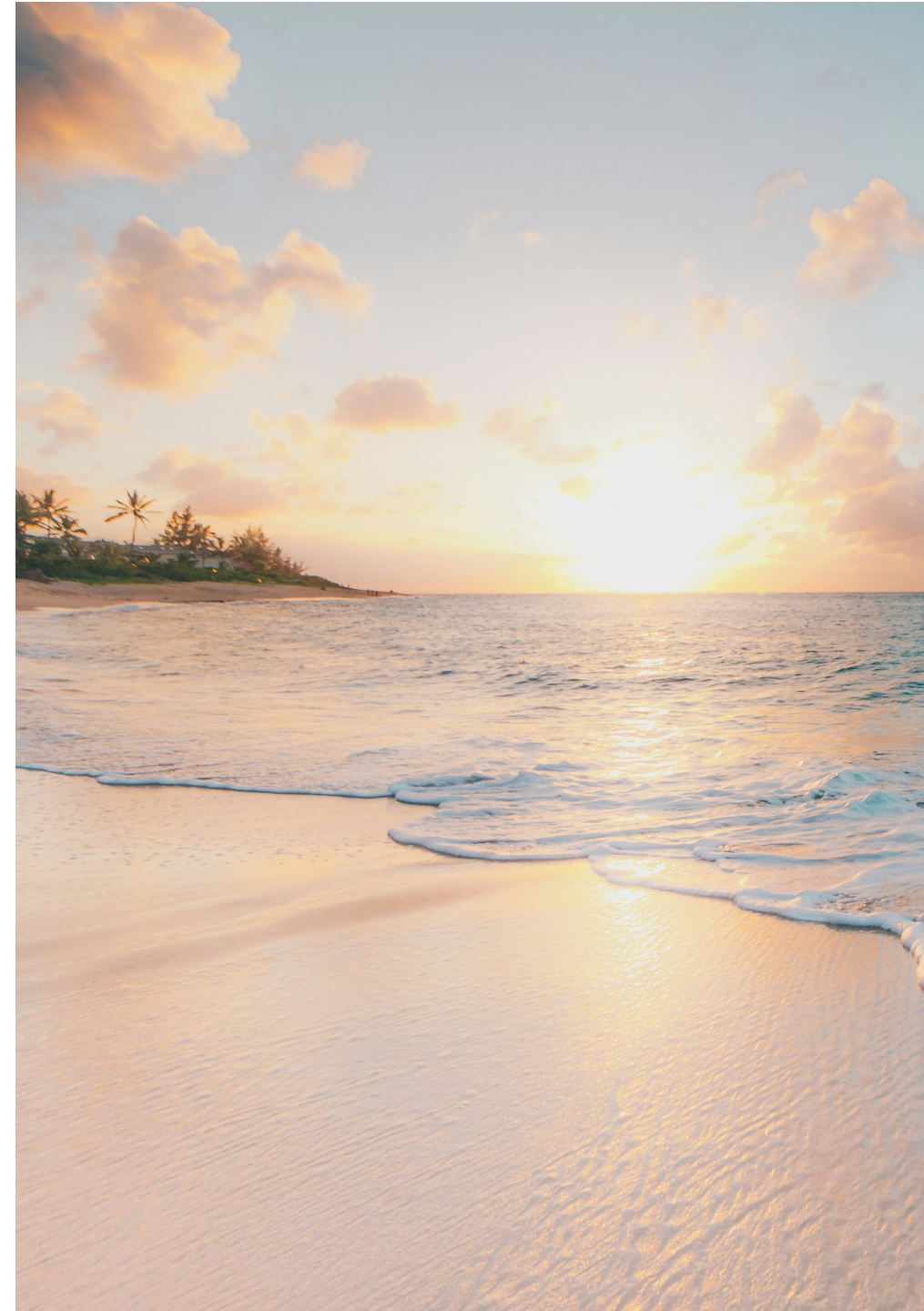
Vacation Motivators & Activities

- **The core promise is "recharge and reconnect."**
Unplugging (81%) and family time (78%) lead motivators—package effortless relaxation with family-friendly planning to lower friction.
- **Nature + culture clinch the choice—feature both in every itinerary.**
Exploring nature and the outdoors (70%) and experiencing different cultures (69%) are also decisive motivators; blend authentic cultural experiences with Hawaii's extensive natural assets to build on promises of family time and relaxation.
- **Broader activity appetite = bigger pre-book revenue.**
Prospects over-index on beaches (63%), state or national parks (61%), museums (54%), food tours (42%), concerts (42%) and adventure (36%) relative to all U.S. leisure travelers—highlighting these activities in advertising would increase overall appeal.
- **Meet them where they research: practical + personalized.**
Cost breakdowns and best-time-to-visit are the most useful information, while 59% have used AI tools for planning—pair transparent pricing with information easily processed by AI tools to speed decisions.

Key Insights

Trip Planning

- **Dreaming is often triggered by timing and travel deals, with social content amplifying it.**
Seasonal planning, compelling offers, and friend/partner cues start the journey, while articles and social posts nudge intent. Life events are also important so marketing marriage ceremonies or other key occasions could draw additional interest from prospects.
- **Destination are chosen before all else in the planning and booking process.** Almost seven in 10 (68%) prospects select a destination as one of their first three planning steps, with 40% comparing prices and features in these first steps. Ensuring visibility of price information where the destination information is provided will be appreciated by these travelers.
- **1–3 months is the booking sweet spot—front-load scarcity cues.**
Flights, accommodations and activities are most commonly booked in the 1-3-month window; dining decisions are made later. Use limited-time offers and real-time availability to encourage earlier booking.
- **Risk and reputation are the tie-breakers—win them proactively.**
Natural disasters, health risks, overcrowding, overbooked activities, negative word-of-mouth and negative reviews weigh more heavily on prospects—keep safety updates and credible user reviews highly visible.

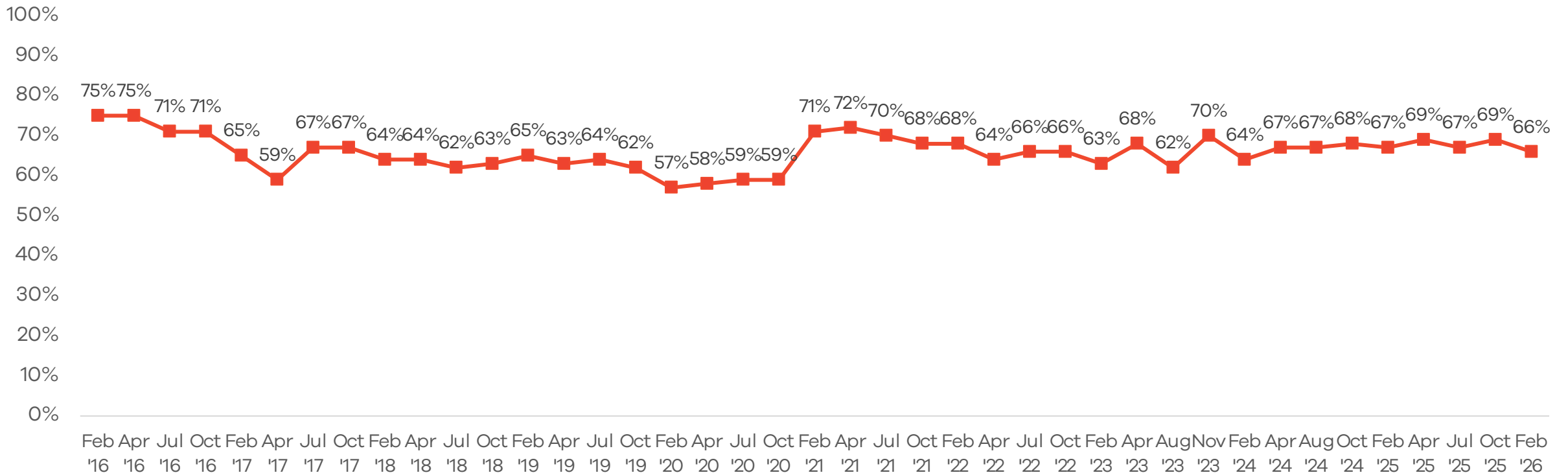


Hawaii Tourism Proprietary Questions



Two in three (66%) U.S. leisure travelers are interested in visiting Hawaii in the next two years.

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



Hawaii Tourism Proprietary Questions

Base: U.S. Leisure Travelers (n=3,766)

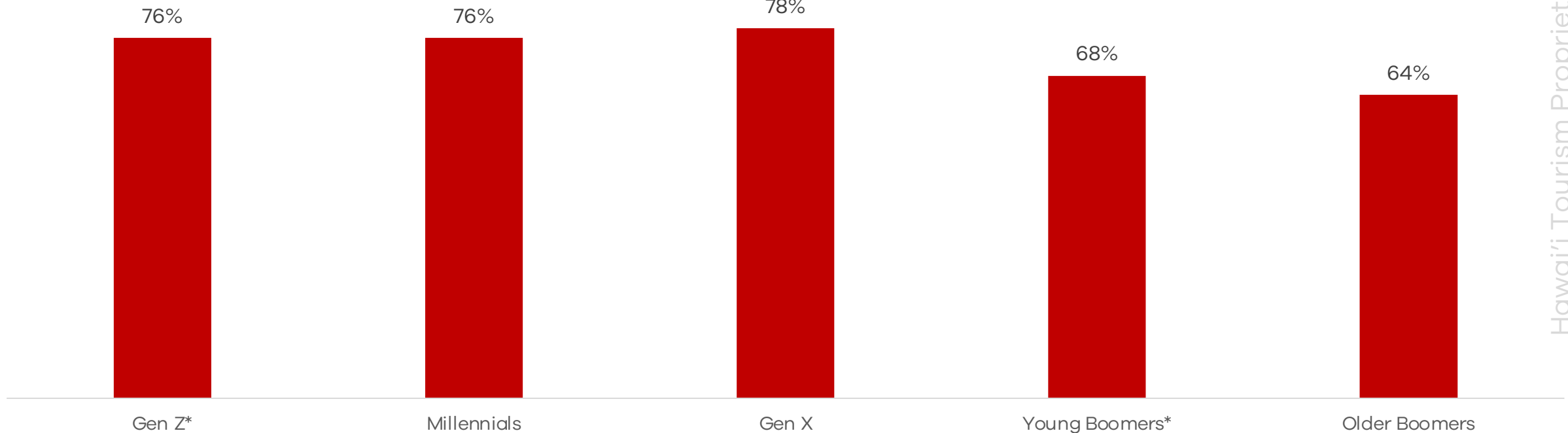
Source: MMGY's 2026 *Portrait of American Travelers*™ "Spring Edition"



Gen Zers, Millennials and Gen Xers are the most interested in visiting Hawaii in Q1 '26.

Interest in Visiting Hawai'i
By Generation

■ Q1 '26

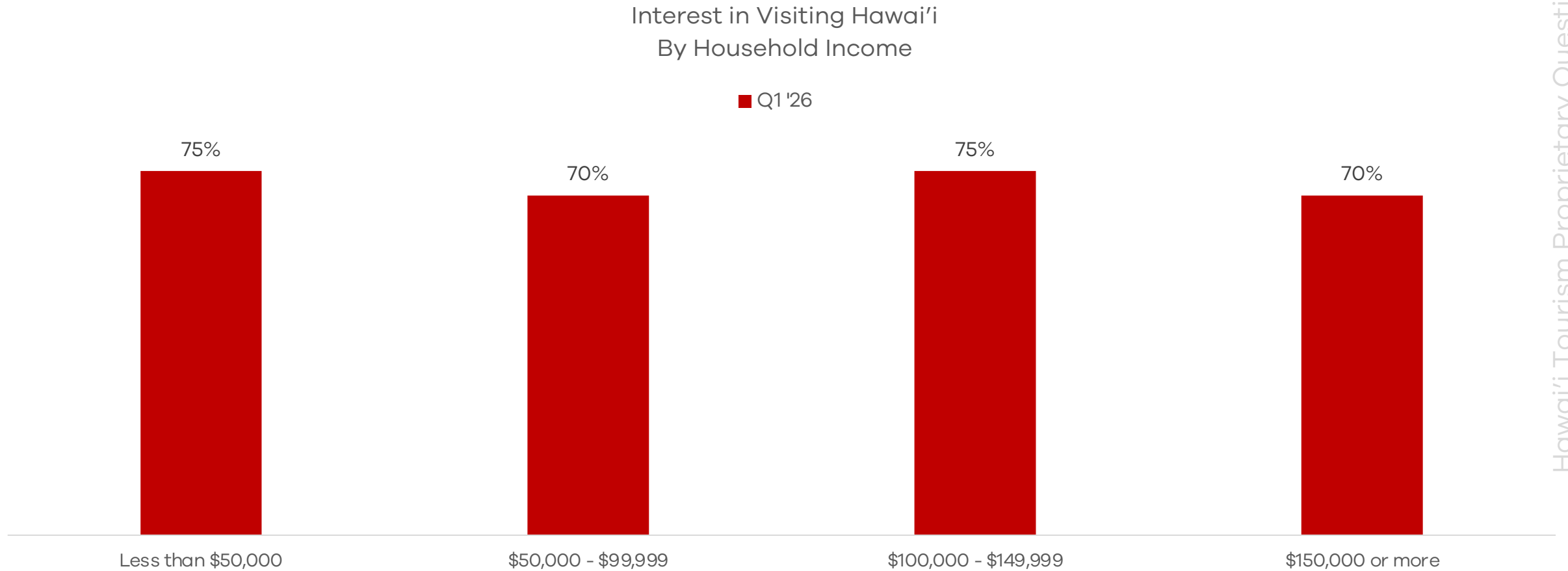


* Small sample size – Interpret with caution.

Base: Likely to take a domestic flight in the next six months (n=1,568)

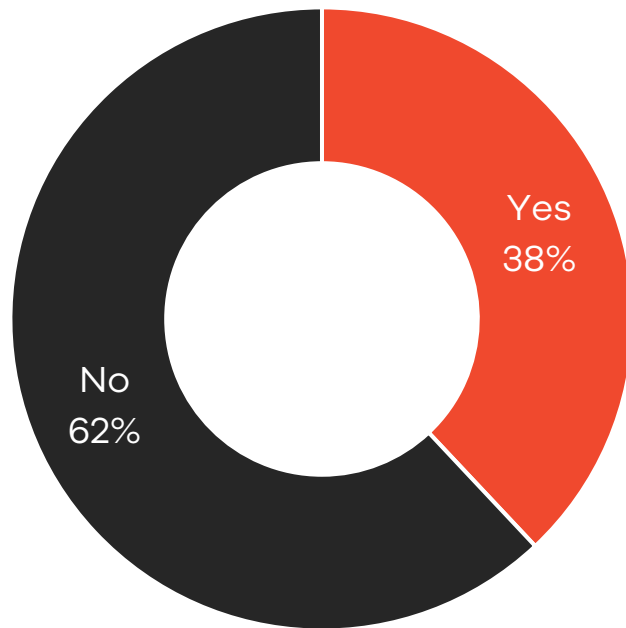
Source: MMGY's 2026 *Portrait of American Travelers*® "Spring Edition"

Hawaii is a popular destination across travelers of all household incomes.



The price of airfare is a significantly bigger reason stopping Hawaii prospects compared to the previous two years.

Considered Visiting Hawaii But Changed Their Mind
All U.S. leisure travelers



| Reasons For Not Visiting Hawaii – Among U.S. Leisure Travelers Who Changed Their Mind | Spring '24 | Spring '25 | Spring '26 |
|---|------------|------------|------------|
| Price of airfare | 40% | 37% | 44% |
| Price of a vacation package | 34% | 33% | 29% |
| Price of the hotel | 29% | 32% | 28% |
| The flight to Hawai'i is too long | 23% | 20% | 20% |
| Better value at another destination | 21% | 20% | 18% |
| Not enough time to travel to Hawai'i | 14% | 13% | 15% |
| Potential of Hurricanes and tropical storms hitting Hawaii | 9% | 10% | 12% |
| Already been and want to try another destination | 12% | 11% | 11% |
| Not sure which island(s) in Hawai'i to visit | 10% | 9% | 11% |
| Hawai'i is too crowded | 10% | 9% | 10% |
| Heard/read that Hawai'i residents don't want visitors | 8% | 11% | 10% |
| Higher quality entertainment at other destinations | 8% | 8% | 9% |
| Accommodations were not available | 7% | 8% | 8% |
| Hawai'i is not unique enough | 6% | 7% | 8% |
| Not enough dining options at price point | 5% | 4% | 8% |
| Availability of rental car inventory | 8% | 7% | 6% |
| Hawai'i is not exotic enough | 4% | 4% | 6% |
| I still do not feel comfortable visiting Hawai'i since the Mau'I wildfires | 5% | 4% | 2% |

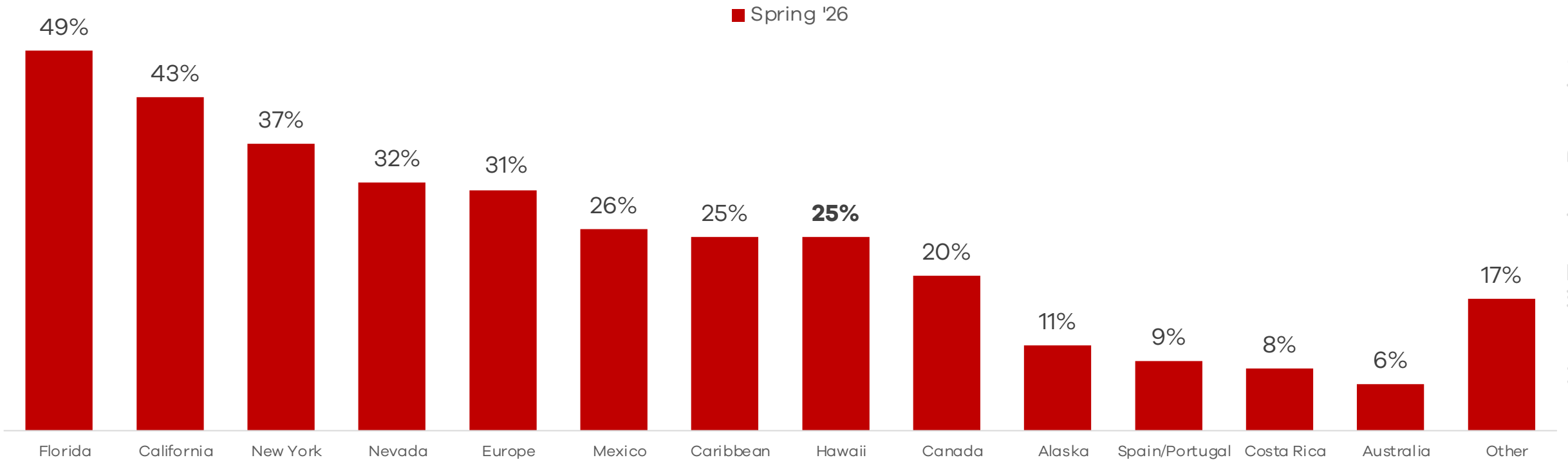
Data in bold indicates a significant difference from Spring '25

Base: U.S. leisure travelers (n=3,688) & U.S. Leisure Travelers Who Changed Their Mind (n=1,417)

Source: MMGY's 2026 *Portrait of American Travelers*® "Spring Edition"

A quarter (25%) of Hawaii prospects have visited the state in the past three years, indicating a strong appetite for repeat visitation.

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



Hawai'i Tourism Proprietary Questions

Base: Hawaii prospects (n=1,096)

Source: MMGY's 2026 *Portrait of American Travelers*® "Spring Edition"



One in five Hawaii prospects (20%) are likely to choose Hawaii as their next vacation destination.

| Destinations Most Likely to Book First in the Next Two Years | U.S. Leisure Travelers | Hawaii Prospects |
|--|------------------------|------------------|
| Hawaii | 14% | 20% |
| Another U.S. state | 40% | 33% |
| Caribbean | 11% | 11% |
| Europe | 14% | 18% |
| Mexico | 7% | 8% |
| Asia | 6% | 7% |
| Oceania | 2% | 3% |
| Other | 6% | 2% |

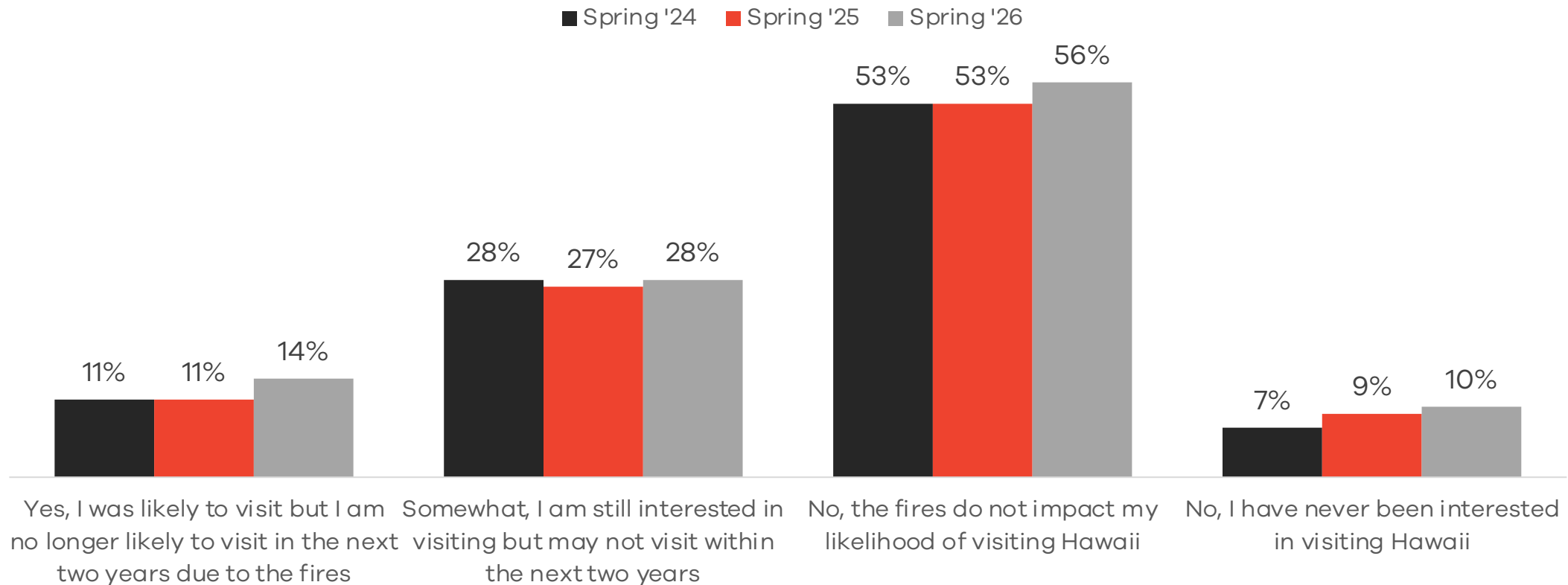
Data in bold indicates a significant difference from U.S. Leisure Travelers

Base: U.S. Leisure Travelers (n=3,688), Hawaii prospects (n=1,096)

Source: MMGY's 2026 *Portrait of American Travelers*® "Spring Edition"

Over half (56%) of U.S. leisure travelers said Maui fires are not impacting their likelihood to visit Hawaii, an increase of 3% from Spring '25.

Does the knowledge of the Maui fires impact your likelihood of visiting Hawaii within the next two years?



When describing Hawaii, the most common perceptions focused on its beaches, natural beauty and the Hawaiian culture and history.

Which of the Following Best Describes What Comes to Mind When You Think of Hawaii as a Vacation Destination?

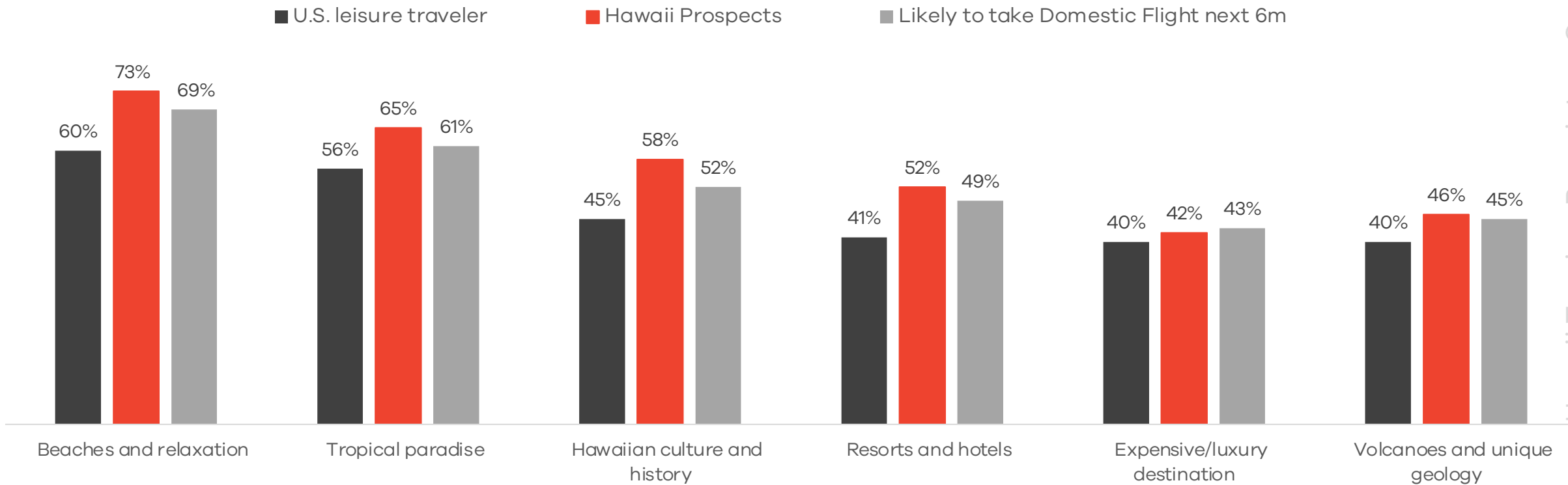


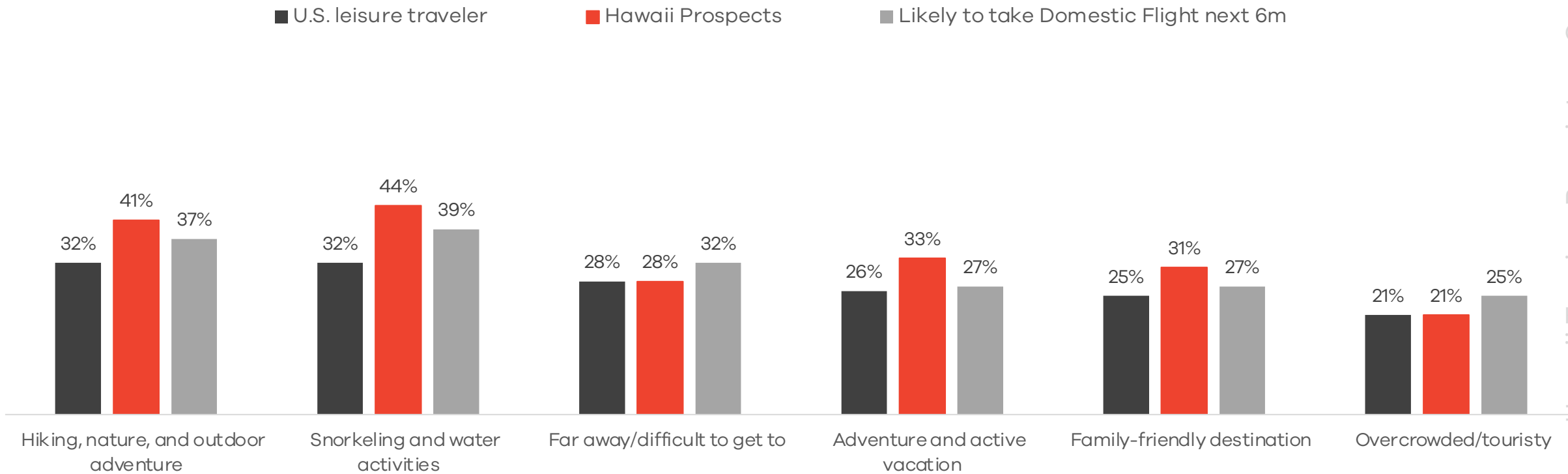
Chart continues on the next slide

Base: U.S. Leisure Travelers (n=3,688), Hawaii prospects (n=1,096), Likely to take a domestic flight next 6 months (n=1,677)

Source: MMGY's 2026 *Portrait of American Travelers*™ "Spring Edition"

Hawaii prospects were more likely to cite the destination's hiking, nature and outdoor adventure, snorkeling and water activities when thinking about the destination compared to U.S. leisure travelers overall.

Which of the Following Best Describes What Comes to Mind When You Think of Hawaii as a Vacation Destination?



Hawaii Tourism Proprietary Questions

Chart continued from previous slide

Base: U.S. Leisure Travelers (n=3,688), Hawaii prospects (n=1,096), Likely to take a domestic flight next 6 months (n=1,677)

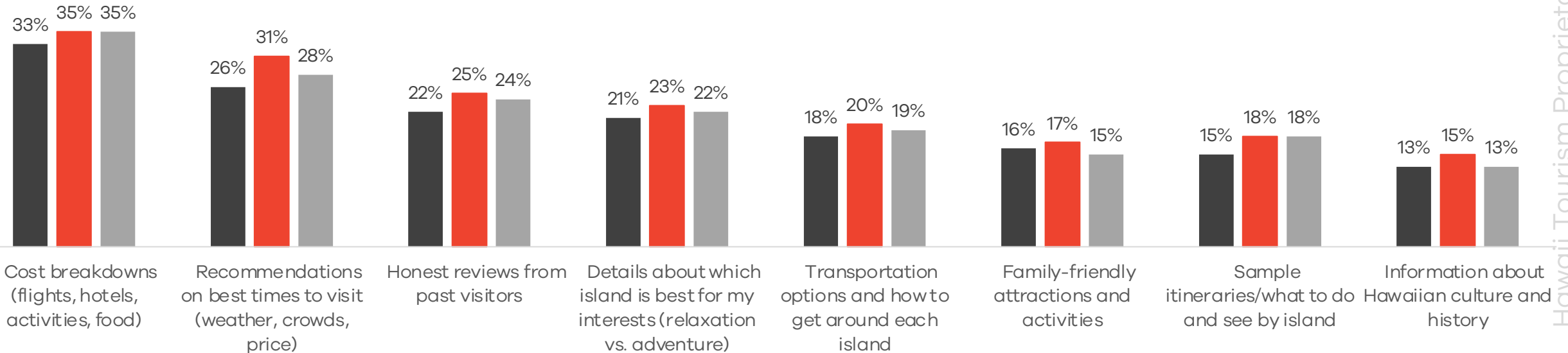
Source: MMGY's 2026 *Portrait of American Travelers*™ "Spring Edition"



Cost breakdowns are the most useful information for all travelers, prospects and domestic air travelers, followed by recommendations on best times to visit.

If You Were to Research Hawaii Before Deciding to Visit, Which of the Following Would be Most Helpful to You?

■ U.S. leisure traveler ■ Hawaii Prospects ■ Likely to take Domestic Flight next 6m



Hawaii Tourism Proprietary Questions

Base: U.S. Leisure Travelers (n=3,688), Hawaii prospects (n=1,096), Likely to take a domestic flight next 6 months (n=1,677)

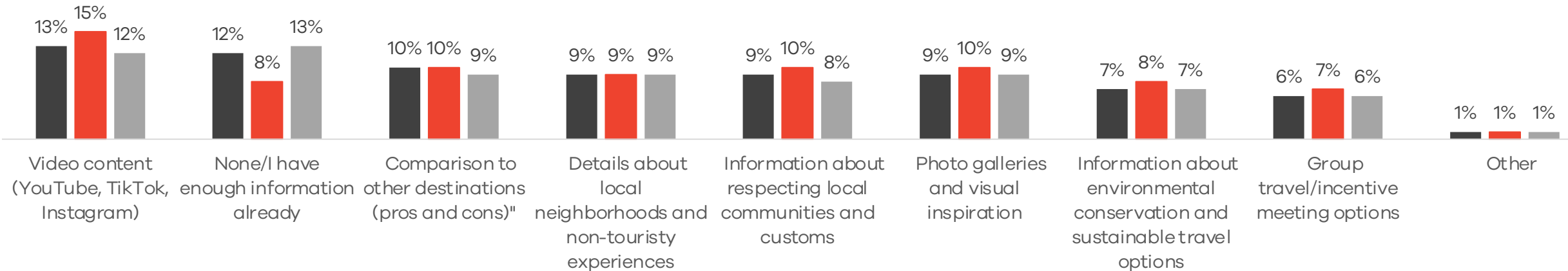
Source: MMGY's 2026 *Portrait of American Travelers*™ "Spring Edition"



Group travel options and information about environmental conservation is the least useful for all U.S. travelers when researching Hawaii.

If You Were to Research Hawaii Before Deciding to Visit, Which of the Following Would be Most Helpful to You?

■ U.S. leisure traveler ■ Hawaii Prospects ■ Likely to take Domestic Flight next 6m



Hawaii Tourism Proprietary Questions

Base: U.S. Leisure Travelers (n=3,688), Hawaii prospects (n=1,096), Likely to take a domestic flight next 6 months (n=1,677)

Source: MMGY's 2026 *Portrait of American Travelers*™ "Spring Edition"



The Hawaii Prospect



Self-Described Personas

| | U.S. Leisure Travelers | Hawaii Prospect |
|---------------------------------|------------------------|-----------------|
| Beach lover | 42% | 53% |
| Foodie | 38% | 44% |
| Family traveler | 34% | 42% |
| Pet lover | 34% | 39% |
| World traveler | 25% | 35% |
| Sports fan/enthusiast | 28% | 33% |
| Outdoor adventurer | 27% | 32% |
| Travel bargain hunter | 27% | 32% |
| Cruise lover | 22% | 30% |
| Luxury traveler | 19% | 30% |
| Theme park enthusiast | 21% | 29% |
| All-inclusive resort enthusiast | 21% | 28% |
| Concert/festival enthusiast | 22% | 27% |
| Moderate (politically) | 23% | 26% |
| Liberal (politically) | 19% | 25% |
| Conservative (politically) | 23% | 23% |
| Environmentally-conscious | 18% | 23% |
| Wine enthusiast | 17% | 23% |
| Cocktail enthusiast | 14% | 20% |
| Video game enthusiast | 17% | 18% |
| Recreational cannabis user | 11% | 11% |
| Golf enthusiast | 10% | 11% |
| Ski/snowboard enthusiast | 7% | 10% |
| Social justice activist | 8% | 9% |
| Road warrior (business travel) | 5% | 7% |

Hawaii prospects define themselves as Beach lovers, foodies and family travelers to a significantly greater extent than overall U.S. leisure travelers.

Prospects are also significantly more likely to describe themselves as world travelers, luxury travelers and cruise lovers, indicating an affluent audience with a taste for high-end travel experiences.

The Hawaii Prospect

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

Base: U.S. Leisure Travelers (n=4,502), Likely to Visit Hawaii (n=1,096)
Source: MMGY's 2026 *Portrait of American Travelers™* "Spring Edition"



Demographics

| | U.S. Leisure Travelers | Likely Hawaii Visitors |
|------------------------|------------------------|------------------------|
| Male | 48% | 53% |
| Female | 51% | 47% |
| Other | 1% | 0% |
| Gen Zers | 18% | 13% |
| Millennials | 28% | 31% |
| Gen Xers | 24% | 26% |
| Young Boomers | 16% | 20% |
| Older Boomers | 11% | 10% |
| Have children under 18 | 29% | 32% |
| White | 73% | 74% |
| Hispanic | 18% | 18% |
| African American/Black | 15% | 13% |
| Asian | 8% | 10% |
| Native American | 3% | 2% |
| Other | 4% | 4% |

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

Base: U.S. Leisure Travelers (n=4,502), Likely to Visit Hawaii (n=1,096)

Source: MMGY's 2026 *Portrait of American Travelers™* "Spring Edition"

Demographics

| | U.S. Leisure Travelers | Likely Hawaii Visitors |
|--------------------------------|------------------------|------------------------|
| Under \$30,000 | 12% | 3%* |
| \$30,000–\$49,999 | 11% | 6% |
| \$50,000–\$74,999 | 16% | 11% |
| \$75,000–\$99,999 | 10% | 9% |
| \$100,000–\$124,999 | 10% | 11% |
| \$125,000–\$149,999 | 8% | 10% |
| \$150,000–\$249,999 | 23% | 34% |
| \$250,000–\$499,999 | 7% | 13% |
| \$500,000 or more | 2% | 2% |
| | | |
| 4 years or less of high school | 37% | 24% |
| 1–3 years of college | 26% | 24% |
| 4 years of college | 23% | 33% |
| Some graduate school | 3% | 3% |
| Graduate/professional degree | 10% | 15% |

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

*Low sample size

Base: U.S. Leisure Travelers (n=4,502), Likely to Visit Hawaii (n=1,096)

Source: MMGY's 2026 *Portrait of American Travelers™* "Spring Edition"

Demographics

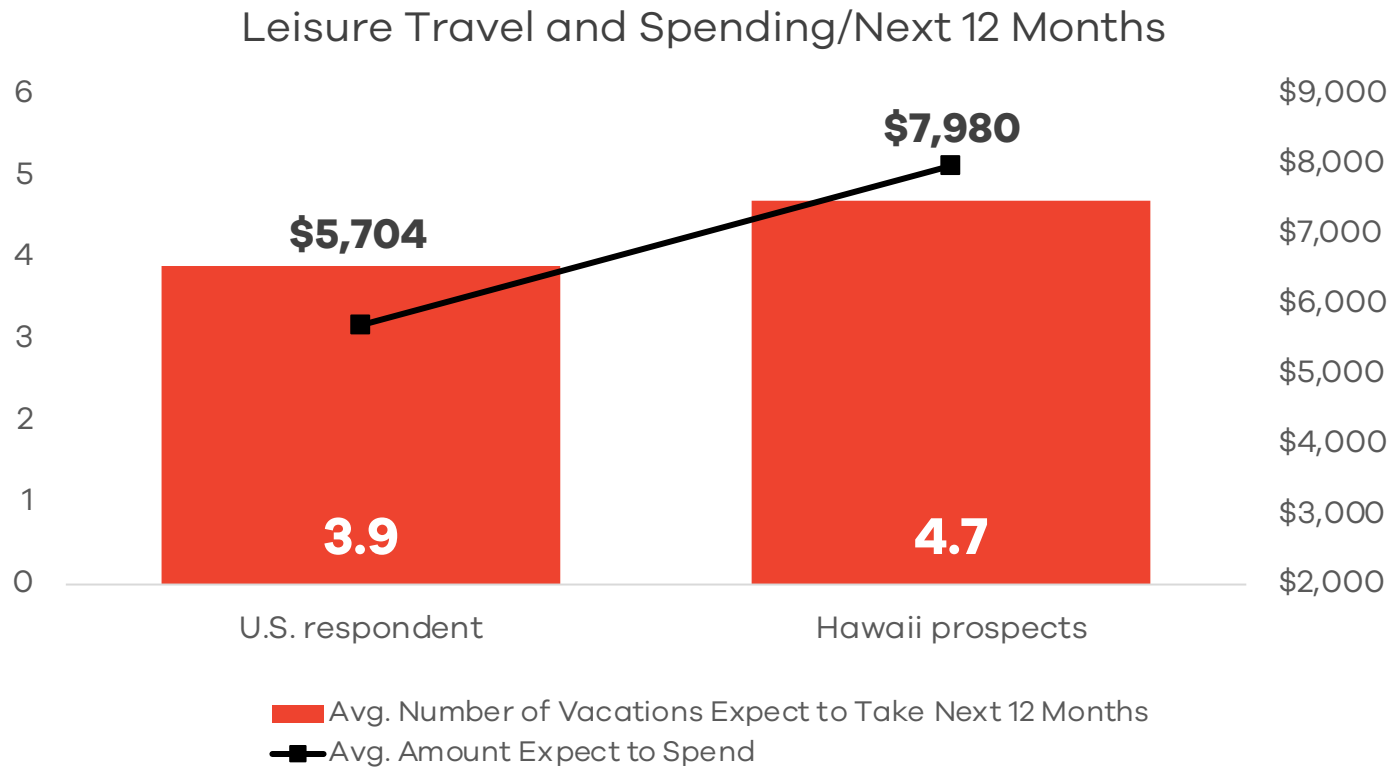
| | U.S. Leisure Travelers | Likely Hawaii Visitors |
|------------------------------|------------------------|------------------------|
| South | 33% | 41% |
| West | 32% | 20% |
| Midwest | 20% | 18% |
| Northeast | 15% | 21% |
| Employed (full or part-time) | 60% | 71% |
| Retired | 24% | 21% |
| Temporarily unemployed | 7% | 3% |
| Homemaker (full-time) | 6% | 3% |
| Student | 3% | 2% |
| Married/living together | 61% | 69% |
| Never married | 27% | 22% |
| Divorced/separated/widowed | 12% | 8% |

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



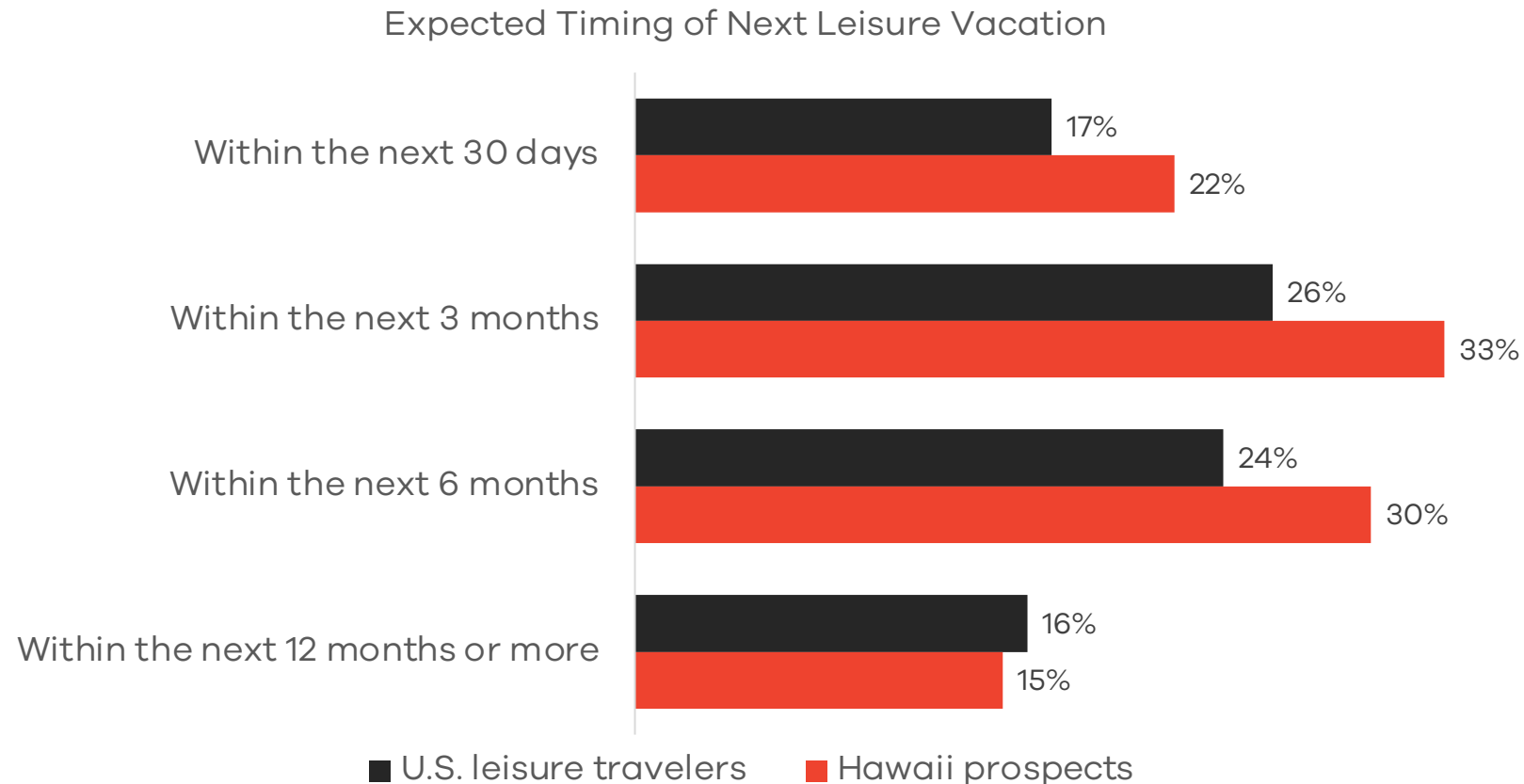
Travel Outlook Snapshot

Hawaii prospects expect to take 0.8 more trips and spend \$2,276 more on leisure travel over the next 12 months compared to U.S. leisure travelers.



- / The high-spend of Hawaii prospects reflects their preference for cruise vacations, definition as luxury travelers and higher average household income (\$177K vs. \$137K for U.S. leisure travelers).
- / Spend per trip averages to \$1,697 for prospects, significantly higher than the \$1,462 for U.S. leisure travelers.

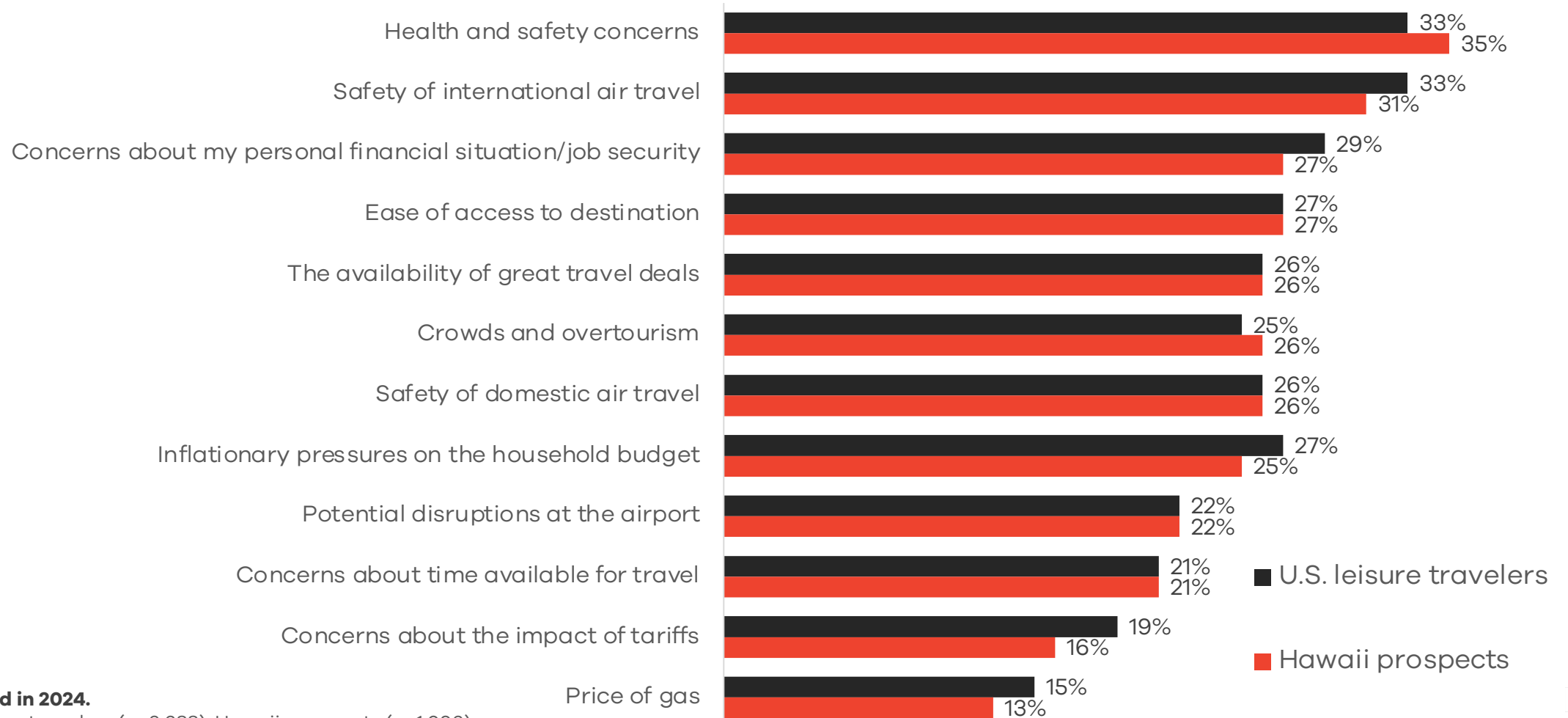
Hawaii prospects expect to take their next vacation sooner than U.S. leisure travelers, with 55% expecting to travel within the next three months.



Base: U.S. leisure travelers (n=3,688); Hawaii prospects (n=1,096)
Source: MMGY's 2026 *Portrait of American Travelers*® "Spring Edition"

Health and safety concerns and the safety of international air travel are the top two concerns for Hawaii prospects.

% Who Are Extremely Impacted By...



NA = Not asked in 2024.

Base: U.S. leisure travelers (n=3,688); Hawaii prospects (n=1,096)

Source: MMGY's 2026 *Portrait of American Travelers*® "Spring Edition"

Where People Want to Visit



California, Colorado and Florida are the top competitor destinations for Hawaii prospects.

| Top 20 States of Interest (excluding Hawaii) | U.S. leisure travelers | Hawaii prospects |
|--|------------------------|------------------|
| California | 57% | 71% |
| Colorado | 56% | 68% |
| Florida | 62% | 67% |
| New York | 52% | 64% |
| Alaska | 50% | 59% |
| Nevada | 48% | 59% |
| Arizona | 48% | 59% |
| Texas | 46% | 52% |
| Maine | 39% | 48% |
| Washington | 38% | 46% |
| Massachusetts | 36% | 46% |
| Tennessee | 41% | 45% |
| North Carolina | 41% | 43% |
| Oregon | 34% | 43% |
| Georgia | 39% | 42% |
| Louisiana | 37% | 42% |
| Montana | 36% | 42% |
| South Carolina | 40% | 41% |
| New Mexico | 34% | 41% |
| Utah | 33% | 40% |

Destinations of Interest

Base: U.S. leisure travelers (n=3,688); Hawaii prospects (n=1,096)

Source: MMGY's 2026 Portrait of American Travelers® "Spring Edition"



Outside of Hawaiian destinations, Las Vegas, Florida Keys and San Diego attract the most interest from prospects.

| Top 20 destinations of interest | U.S. leisure travelers | Hawaii prospects |
|-------------------------------------|------------------------|------------------|
| Island of Hawaii (aka Big Island) | 60% | 84% |
| Maui, HI | 60% | 84% |
| Honolulu, HI | 59% | 79% |
| Kauai, HI | 57% | 78% |
| Las Vegas, NV | 55% | 68% |
| Florida Keys/Key West, FL | 57% | 65% |
| San Diego, CA | 49% | 64% |
| New York City, NY | 49% | 61% |
| Miami, FL | 49% | 56% |
| Orlando, FL | 50% | 55% |
| New Orleans, LA | 47% | 55% |
| San Francisco, CA | 44% | 55% |
| Los Angeles, CA | 44% | 54% |
| Denver, CO | 44% | 54% |
| Phoenix/Scottsdale, AZ | 42% | 54% |
| Tampa, FL | 48% | 52% |
| Tampa/St. Petersburg/Clearwater, FL | 47% | 52% |
| Nashville, TN | 46% | 52% |
| Boston, MA | 41% | 52% |
| Palm Beach, FL | 46% | 51% |

Destinations of Interest

Base: U.S. leisure travelers (n=3,688); Hawaii prospects (n=1,096)

Source: MMGY's 2026 Portrait of American Travelers® "Spring Edition"





Vacation Motivators and Activities



AI usage continues to rise among all U.S. leisure travelers, with Hawaii prospects primarily using these tools to suggest activities of interest or generate travel ideas.

59%

of Hawaii prospects have used ChatGPT or another AI tool for travel planning (compared to 50% of total U.S. leisure travelers).

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



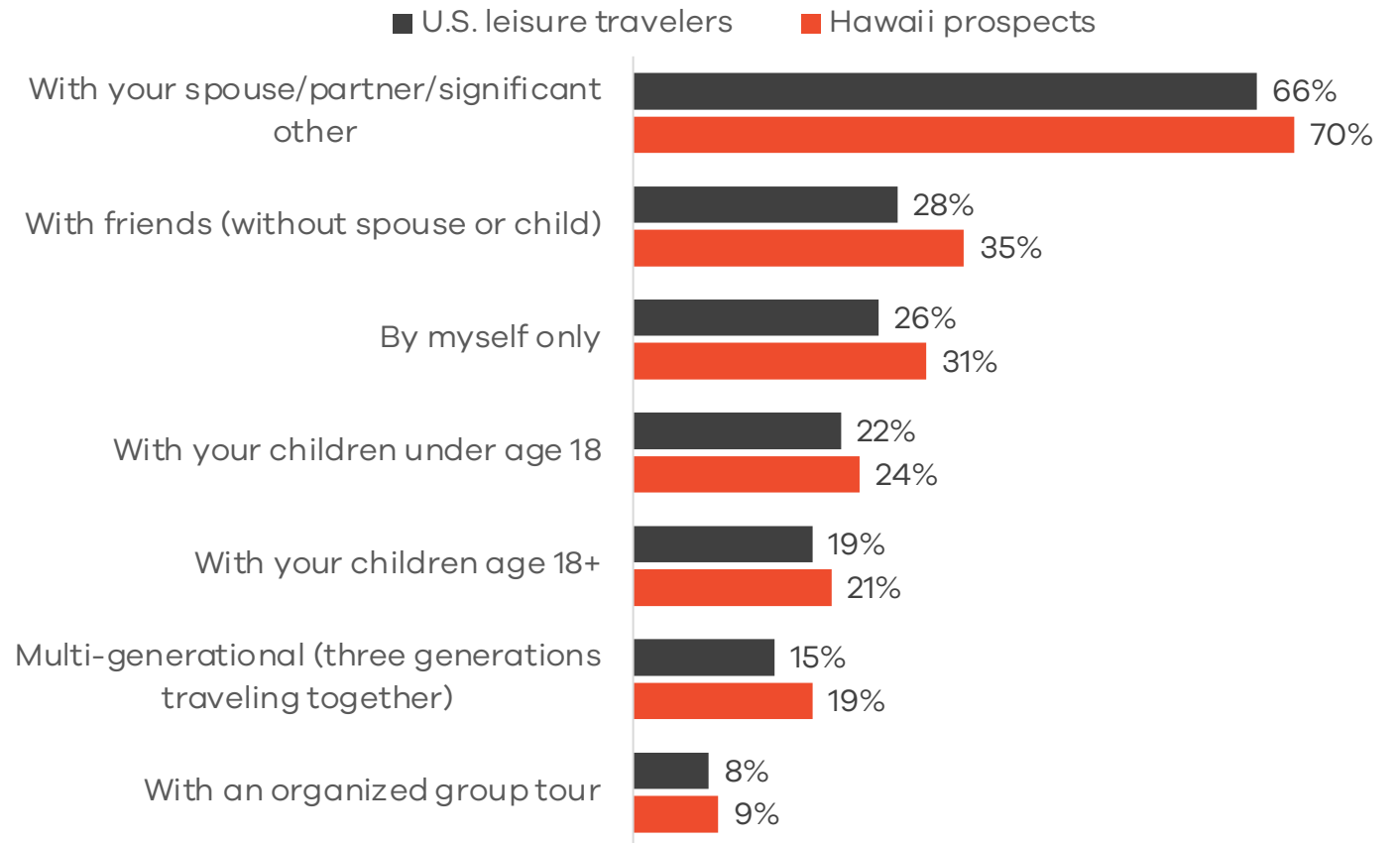
Base: Hawaii prospects (n=1,096); those who have used ChatGPT or another AI tool for travel planning (n=646)

Source: MMGY's 2026 *Portrait of American Travelers*® "Spring Edition"



Hawaii prospects are significantly more likely to travel with friends or travel solo compared to U.S. leisure travelers.

Travel Party During the Next Six Months

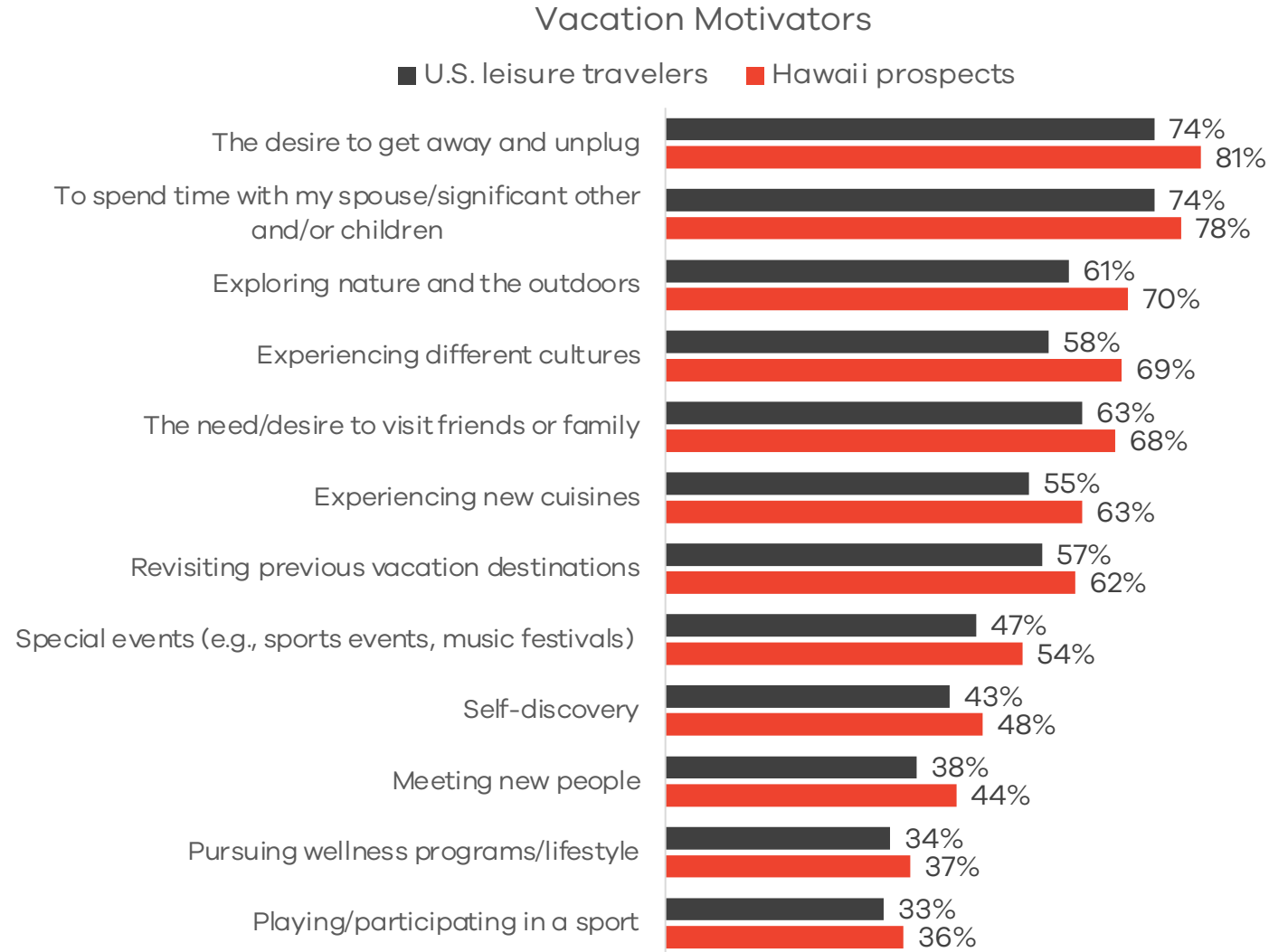


Base: U.S. leisure travelers (n=3,688); Hawaii prospects (n=1,096)
Source: MMGY's 2026 *Portrait of American Travelers*® "Spring Edition"





The desire to get away and unplug, along with spending time with family are primary vacation motivators for prospects.



Base: U.S. leisure travelers (n=3,688); Hawaii prospects (n=1,096)

Source: MMGY's 2026 *Portrait of American Travelers*® "Spring Edition"



What Destination Attributes Influence Choice of Destination?

| Influential When Selecting a Destination | U.S. leisure travelers | Hawaii prospects |
|--|------------------------|------------------|
| Beautiful scenery | 69% | 80% |
| Safety | 56% | 63% |
| Food and drink scene | 52% | 60% |
| Outdoor/nature activities | 49% | 56% |
| Historical significance of a destination | 46% | 53% |
| A sense of tradition (place family has traditionally visited) | 32% | 39% |
| Focus on family activities | 32% | 34% |
| The ethnic diversity and multicultural population of a destination | 22% | 29% |
| Music scene | 24% | 25% |
| Nightlife/bars | 21% | 25% |
| The destination's reputation for environmental responsibility | 15% | 20% |
| Pet-friendly accommodations/activities | 15% | 15% |
| The destination's commitment to social justice and equality | 12% | 15% |
| LGBTQ+ travel offerings | 6% | 6% |

- / Beautiful scenery is significantly more influential for Hawaii prospects than U.S. leisure travelers, with a preference for outdoor adventures and natural getaways seen throughout this report.
- / Safety and the food and drink scene are the second and third biggest influences on prospects, indicating that highlighting Hawaii's unique culinary offerings and reputation for safety would work well when marketing the destination.

Activities of Interest on Vacation

| Activities of interest | U.S. leisure travelers | Hawaii prospects |
|---|------------------------|------------------|
| Beach experiences | 52% | 63% |
| Visiting a state or national park | 50% | 61% |
| Historical sites | 48% | 56% |
| Visiting a museum | 44% | 54% |
| Shopping | 44% | 53% |
| Visiting a zoo or aquarium | 38% | 47% |
| Food tours | 34% | 42% |
| Visiting a theme or amusement park | 33% | 42% |
| Visiting notable architectural sites | 33% | 42% |
| Attending a concert/music festival | 32% | 42% |
| Dining cruise | 32% | 41% |
| Guided tours with access to local experiences that are otherwise inaccessible | 30% | 40% |
| Hiking/climbing/biking/other outdoor adventures | 31% | 36% |
| Attending a sporting event | 27% | 36% |
| Cooking, wine or cocktail class | 26% | 36% |
| Spa Services (massages, facials, etc.) | 25% | 35% |
| Casino gambling | 28% | 31% |
| Adventure travel (safaris, mountain climbing, trekking vacations, etc.) | 24% | 31% |
| Nightlife | 24% | 30% |
| Dinner theatre | 25% | 29% |
| Attending performing arts events | 20% | 28% |
| Camping | 22% | 23% |
| Exploring family's ancestry/past on a heritage vacation | 22% | 23% |
| Water sports (waterskiing, boating/rafting) | 18% | 22% |
| Film/art festivals | 17% | 22% |
| Playing golf | 14% | 16% |
| Snow skiing/snowboarding | 11% | 15% |
| Scuba diving | 10% | 13% |
| Surfing | 8% | 9% |
| Playing tennis | 6% | 6% |

/ Beach experiences, visiting a state/national park and historical sites are the top activities of interest for Likely Hawaii visitors.

/ Higher interest in a wide-range of activities suggests that Hawaii prospects would find vacation itineraries that feature a wide range of activities more appealing compared to the average U.S. leisure traveler.



Strategy and Planning

What Makes Me Start **Dreaming** about the Vacation

| | U.S. Leisure Travelers | Hawaii Prospects |
|--|------------------------|------------------|
| I read an interesting article about a destination | 44% | 53% |
| I'm longing for change or adventure | 38% | 42% |
| I saw an interesting post on social media featuring a destination | 36% | 45% |
| I saw others' vacation photos | 36% | 46% |
| I want to experience a destination after consuming media that refers to it | 36% | 44% |

Top 5 drivers of what makes me start dreaming about a vacation.

Base: U.S. leisure travelers (n=3,688); Hawaii prospects (n=1,096)

Source: MMGY's 2026 *Portrait of American Travelers*™ "Spring Edition"

What Makes Me Start **Planning** the Vacation

I traditionally start planning a trip for a specific time of year

U.S. Leisure Travelers

59%

Hawaii Prospects

64%

There's a good travel deal

53%

62%

A friend or my partner/spouse suggests it

48%

51%

I have a life event I want to celebrate

47%

55%

I have vacation time I need to use

44%

50%

Top 5 drivers of what makes me start planning a vacation.

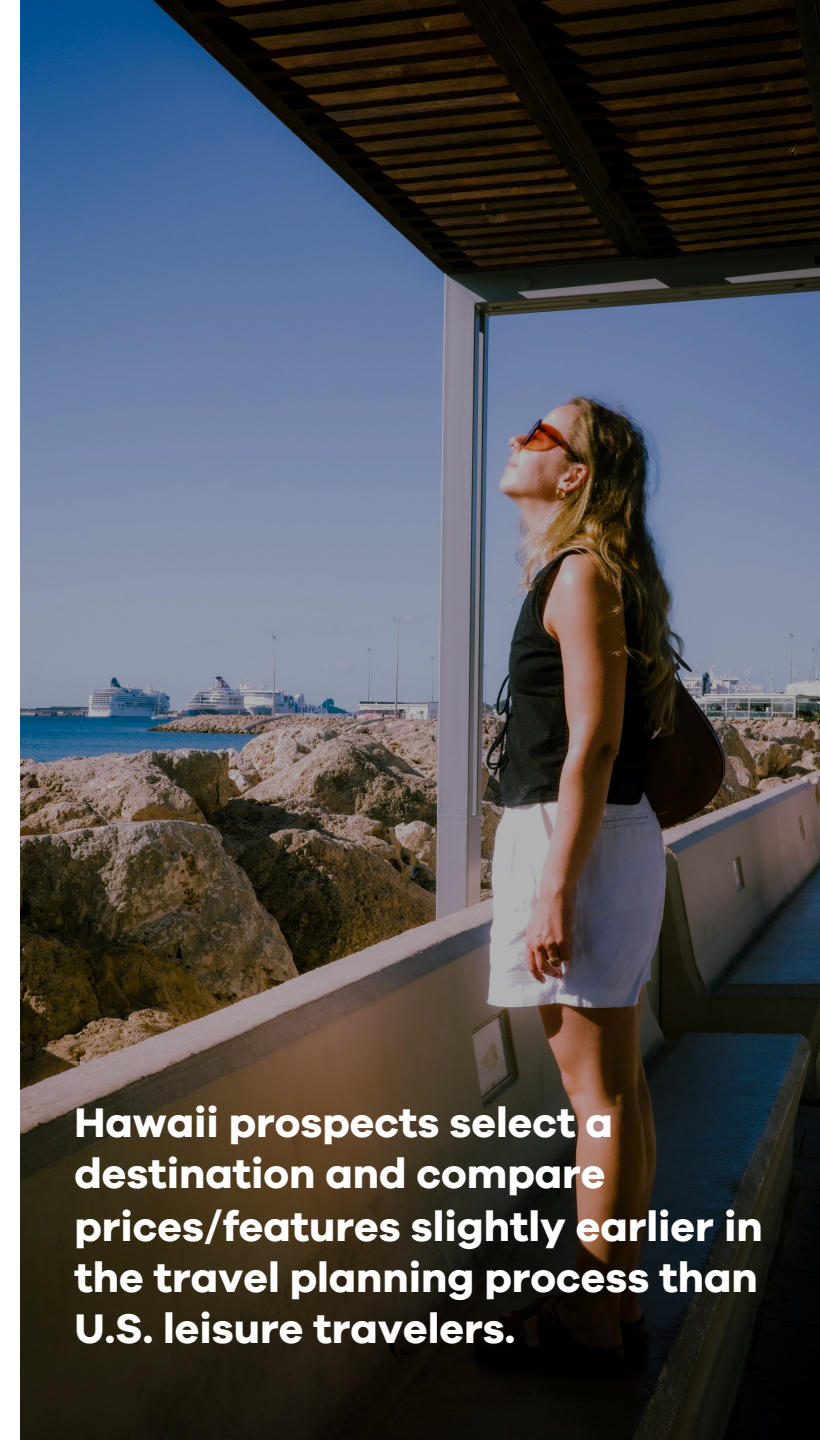
Base: U.S. leisure travelers (n=3,688); Hawaii prospects (n=1,096)

Source: MMGY's 2026 *Portrait of American Travelers*™ "Spring Edition"



Typical Steps in the Trip Planning and Booking Process

| | Summary Table of Steps <i>% Ranked 1-3</i> | USLT | Hawaii Prospects |
|----|---|------|------------------|
| 1 | Select a destination | 66% | 68% |
| 2 | Compare prices/features for possible travel service providers | 36% | 40% |
| 3 | Book accommodations/transport | 34% | 34% |
| 4 | Research online travel reviews and ratings | 31% | 32% |
| 5 | Talk to friends and family about possible vacation/trip plans | 33% | 28% |
| 6 | Set a vacation/trip budget | 31% | 28% |
| 7 | Pick a vacation type (e.g., cruise, beach, city break, etc.) | 24% | 26% |
| 8 | Decide on vacation/trip activities (e.g., restaurants, theme parks, etc.) | 17% | 15% |
| 9 | Consult with travel companions about possible vacation/trip plans | 15% | 15% |
| 10 | Talk to a traditional travel advisor | 4% | 4% |
| 11 | Use AI tools for recommendations/itinerary, etc. | 3% | 4% |
| 12 | Apply for necessary visas or travel documents | 3% | 3% |
| 13 | Arrange travel insurance | 3% | 2% |



Hawaii prospects select a destination and compare prices/features slightly earlier in the travel planning process than U.S. leisure travelers.

Booking Habits for International Trips

| Typical Booking Time Frame | Flight/Transportation | | Accommodations | | Activities at the Destination | | Restaurant/Dining Experiences | |
|-----------------------------------|-----------------------|------------------|----------------|------------------|-------------------------------|------------------|-------------------------------|------------------|
| | USLT | Hawaii Prospects | USLT | Hawaii Prospects | USLT | Hawaii Prospects | USLT | Hawaii Prospects |
| During the trip | 11% | 7% | 6% | 4% | 19% | 17% | 42% | 43% |
| Less than 1 month before the trip | 12% | 12% | 19% | 16% | 26% | 27% | 24% | 25% |
| 1-3 months before | 41% | 42% | 40% | 39% | 37% | 42% | 23% | 24% |
| 4-6 months before | 26% | 30% | 25% | 30% | 14% | 11% | 8% | 6% |
| 7-12 months before | 8% | 9% | 8% | 10% | 3% | 3% | 2% | 1% |
| 12+ months before | 3% | 1% | 3% | 1% | 2% | 1% | 2% | 1% |

The highlighted percentages represent the top two booking periods reported for each type of reservation booking.

Base: U.S. leisure travelers (n=3,688); Hawaii prospects (n=1,096)

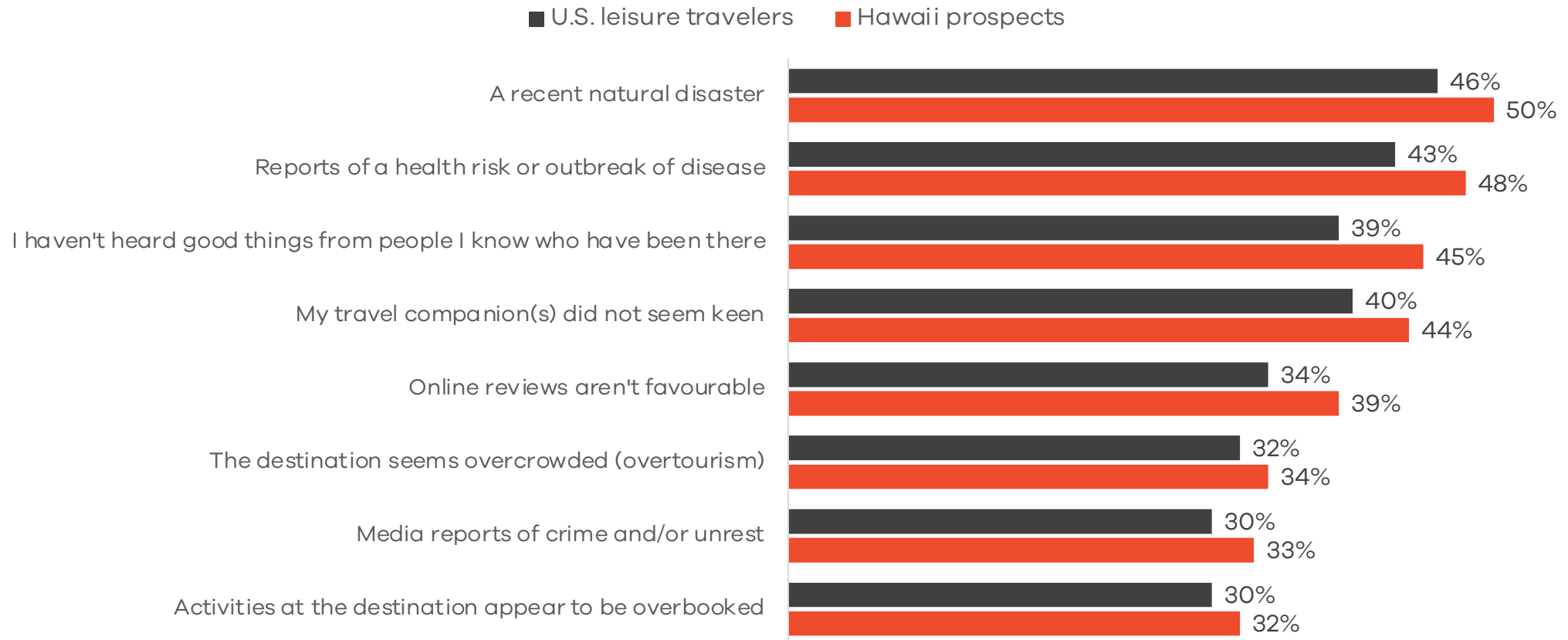
Source: MMGY's 2026 *Portrait of American Travelers*™ "Spring Edition"



Hawaii prospects are more affected by various factors, especially recent natural disasters, compared to U.S. leisure travelers.

To what extent do each of the following typically influence your decision when planning a leisure trip to a specific destination?

Summary Table of Affects on Planning (4/5 on a 5-Point Scale)



Base: U.S. leisure travelers (n=3,688); Hawaii prospects (n=1,096)

Source: MMGY's 2026 *Portrait of American Travelers*™ "Spring Edition"





THANK YOU

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