



Vision Insights U.S. Traveler Profiles June 2024

August 07, 2024



STATE OF HAWAII • DEPARTMENT OF BUSINESS,
ECONOMIC DEVELOPMENT & TOURISM



AUTHORITY

Vision Insights Syndicated Survey

- DBEDT subscribes to Vision Insight's Brand Health and Profiles databases for the U.S., Japan, Canada, Australia, and Korea
- Consumers are surveyed each day
- DBEDT receives access to new data each week for selected traveler profile segments for the U.S., Japan, Canada, Australia, and Korea

Segment Definitions

Avid Traveler \$100k+

- Gross household income is \$100k+
- Age is 25-54
- Either
 - Took an international vacation by air in the last 12 months
 - Likely/very likely to book an air trip in the next 12 months
 - Most recent leisure destination was Hawai'i or Alaska
 - Next leisure destination is Hawai'i or Alaska

Long-Distance Air Traveler under 55

- Took an international vacation by air in the last 12 months
- State of residence is not Hawai'i
- Under the age of 55

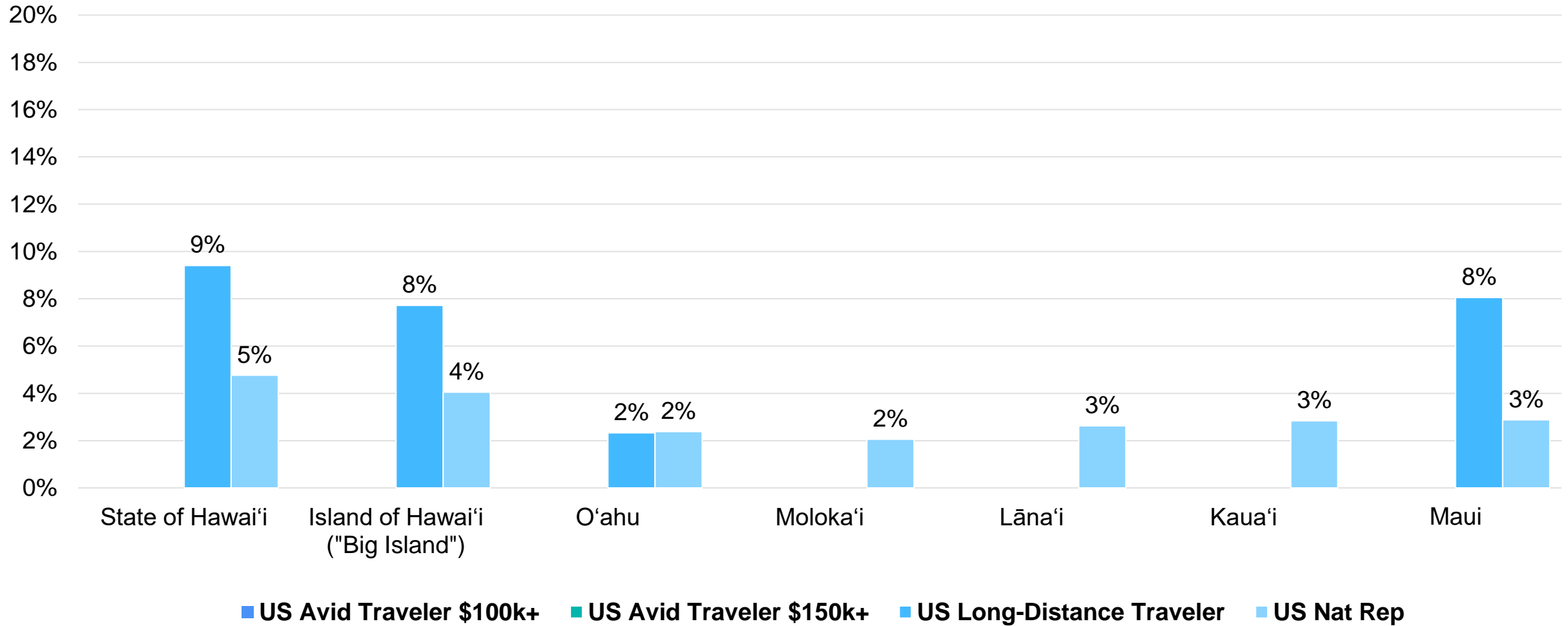
Avid Traveler \$150k+

- Gross household income is \$150k+
- 2+ persons per household
- Age is 25-54
- Either
 - Took an international vacation by air in the last 12 months
 - Likely/very likely to book an air trip in the next 12 months
 - Most recent leisure destination was Hawai'i or Alaska
 - Next leisure destination is Hawai'i or Alaska

Nationally Representative Sample (Nat Rep)

- Representative of U.S. adults in terms of age, gender, social class and education

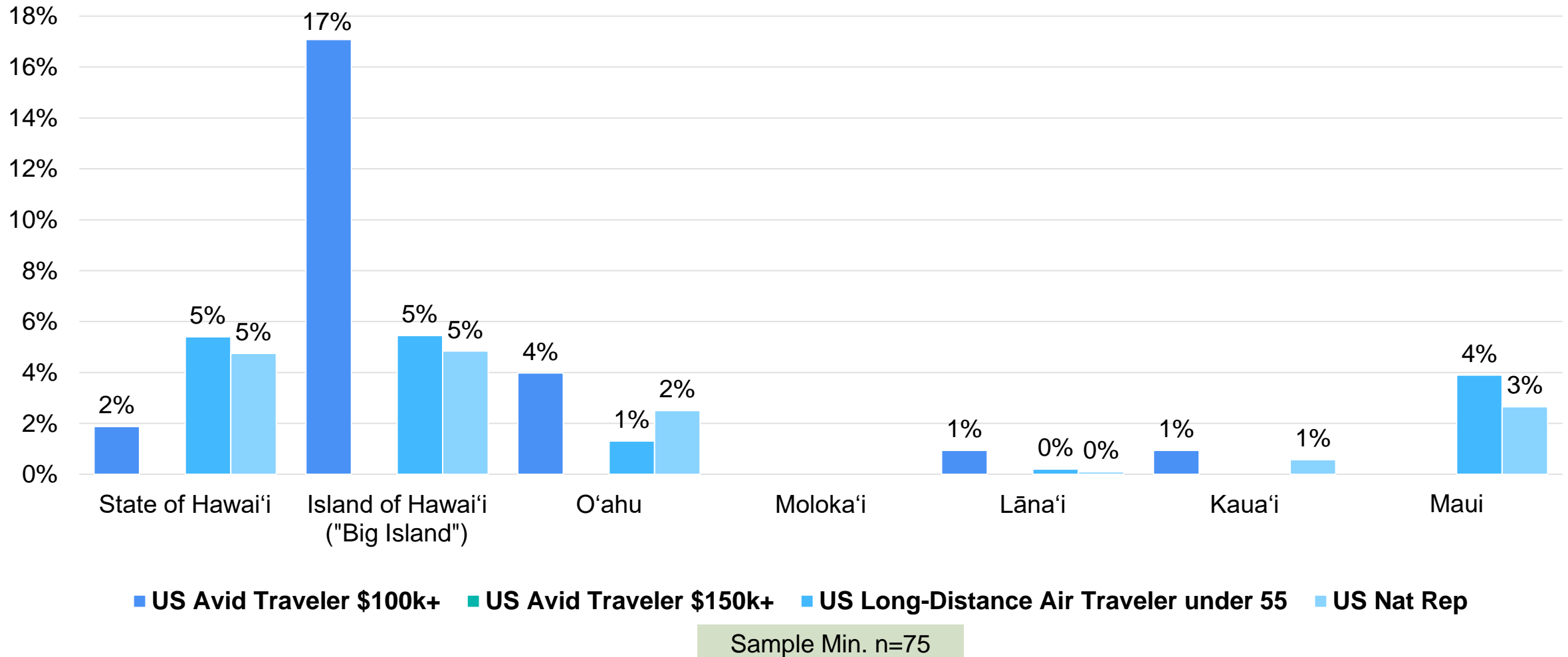
U.S. - Leisure Trip In Past 12 Months



Sample Min. n=50

Note: US Avid Traveler \$100k+, US Avid Traveler \$150k+, and US Long-Distance Traveler sample size is too small for select islands

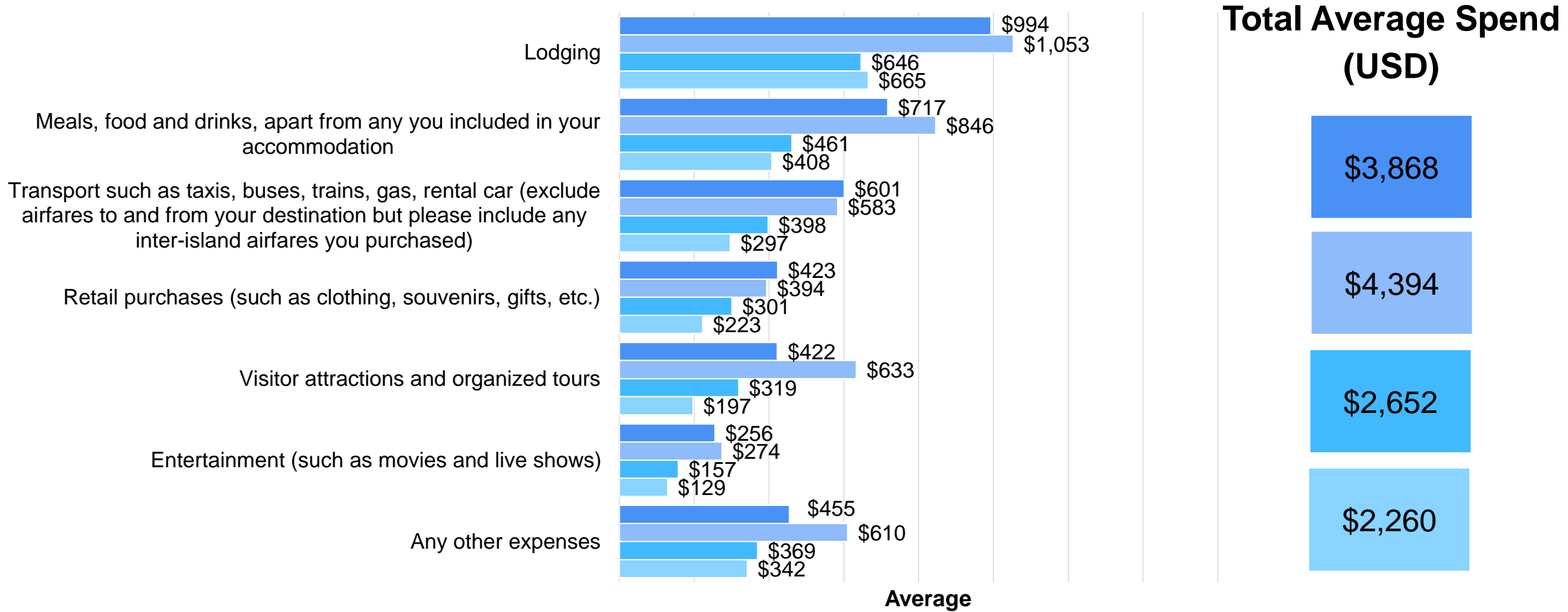
U.S. – Next Destination for Leisure Trip



Top 10 States of Residence by Segment

US Avid Traveler \$100K 25-54		US Avid Traveler \$150K 25-54, 2+ household		US Long-Distance Air Traveler Under 55		US Nat Rep	
	%		%		%		%
Florida	11.6%	Florida	8.5%	New York	9.9%	Florida	8.5%
Texas	8.2%	Texas	7.4%	Florida	9.8%	Texas	7.4%
New York	7.9%	New York	6.4%	Texas	7.1%	New York	6.4%
California	7.2%	Pennsylvania	5.8%	Pennsylvania	6.2%	Pennsylvania	5.8%
Illinois	6.5%	California	5.0%	Illinois	5.4%	California	5.0%
Virginia	2.8%	Illinois	4.0%	California	4.9%	Ohio	4.5%
Georgia	1.7%	Virginia	2.5%	Georgia	2.6%	Illinois	4.0%
Washington	0.9%	New Jersey	2.3%	Washington	1.9%	North Carolina	3.6%
Minnesota	0.9%	Washington	1.5%	Virginia	1.9%	Georgia	3.3%
Pennsylvania	0.0%	Colorado	1.0%	Minnesota	0.2%	Virginia	2.5%
Sample Size:	n=58	Sample Size:	n=20	Sample Size:	n=267	Sample Size:	n=1,771

U.S. - Total Annual Holiday Spend



■ US Avid Traveler \$100k+
 ■ US Avid Traveler \$150k+
 ■ US Long-Distance Air Traveler under 55
 ■ US Nat Rep

Sample Size:

n=58

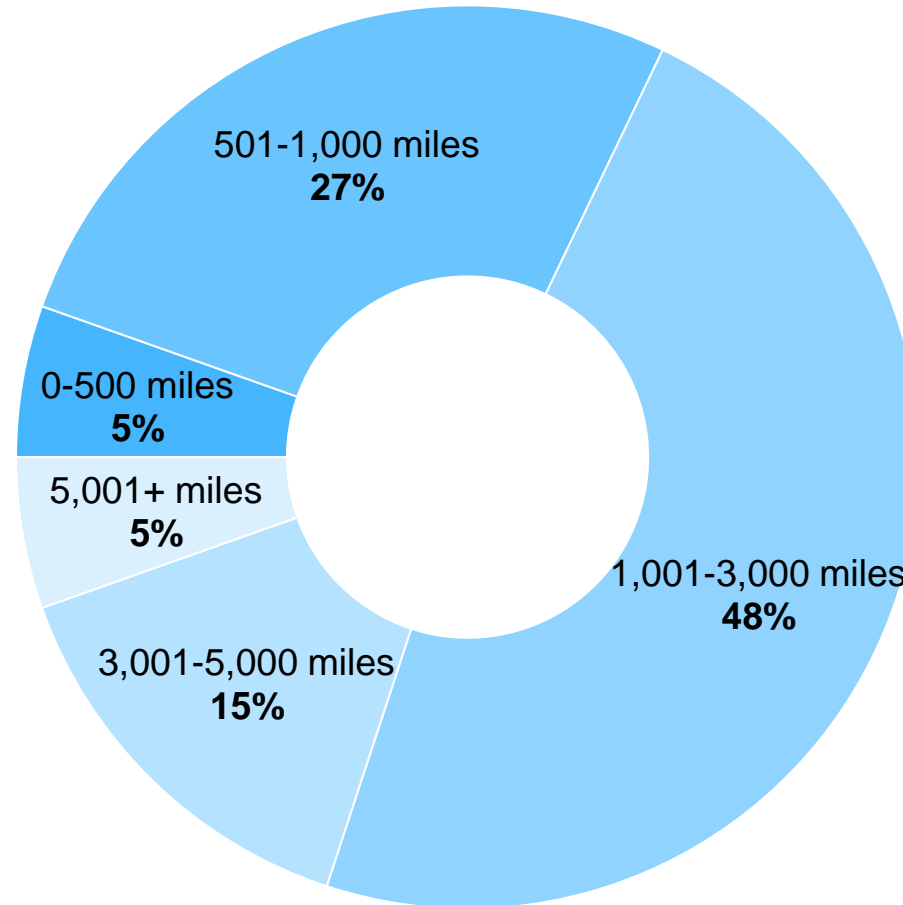
n=20

n=267

n=1,771

U.S. Avid Travelers \$100k+: Annual Vacation

Distance Travelled on Annual Vacation



Sample Size: n=58

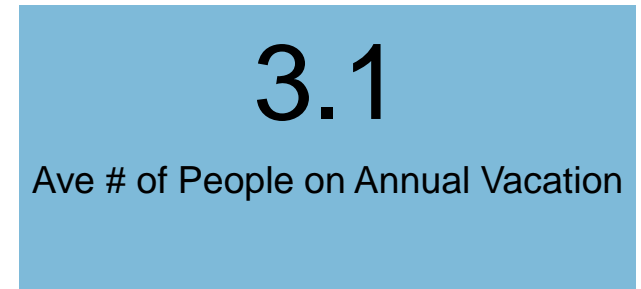
U.S. Avid Travelers \$100k+: Annual Vacation

Average Spend



Sample Size: n=58

Spend Per Person Per Day

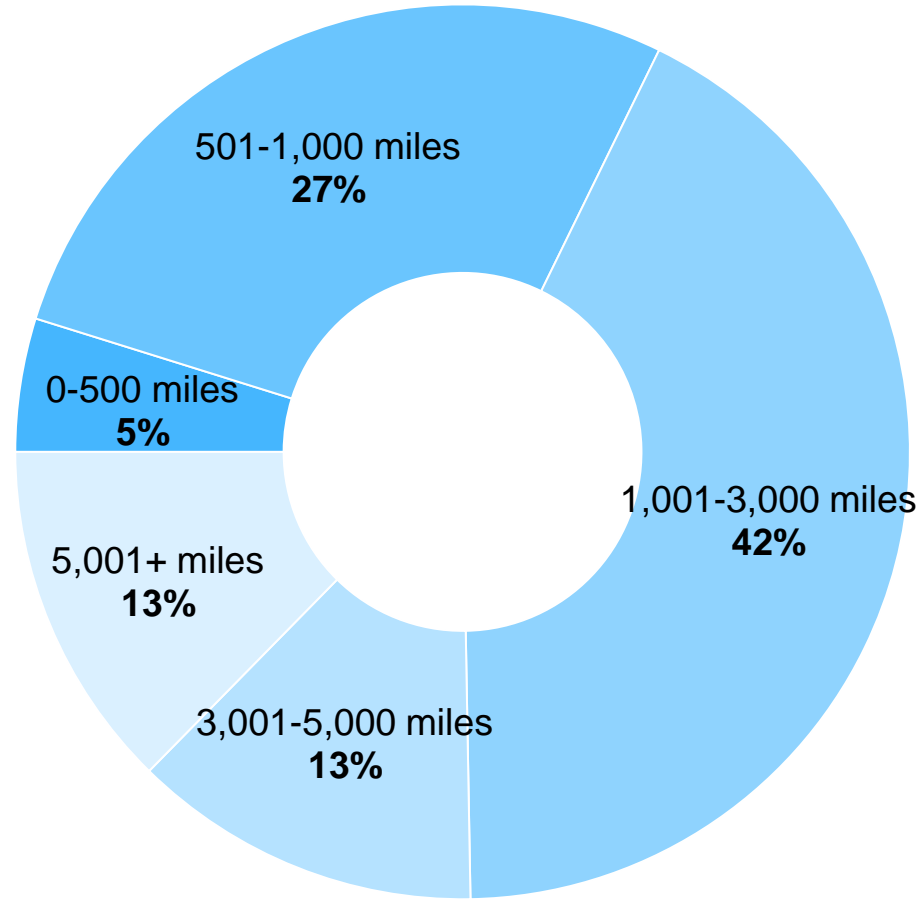


\$198.82

Ave. Per Person Per Day Spend

U.S. Avid Travelers \$150k+: Annual Vacation

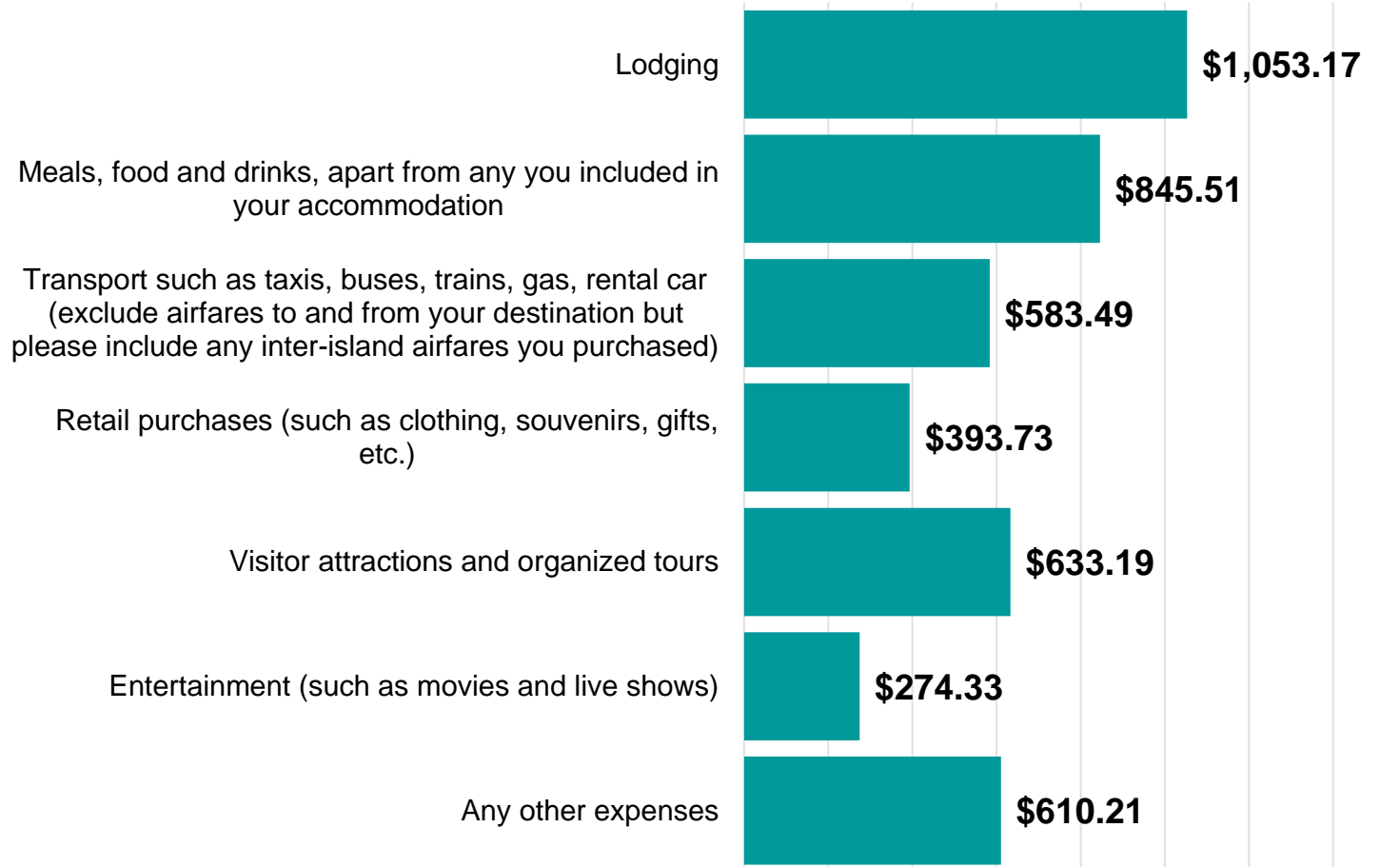
Distance Travelled on Annual Vacation



Sample Size: n=20

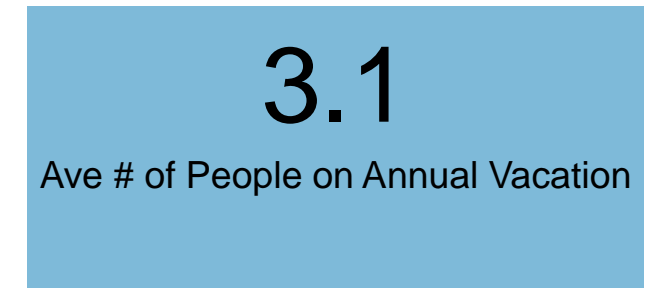
U.S. Avid Travelers \$150k+: Annual Vacation

Average Spend



Sample Size: n=20

Spend Per Person Per Day

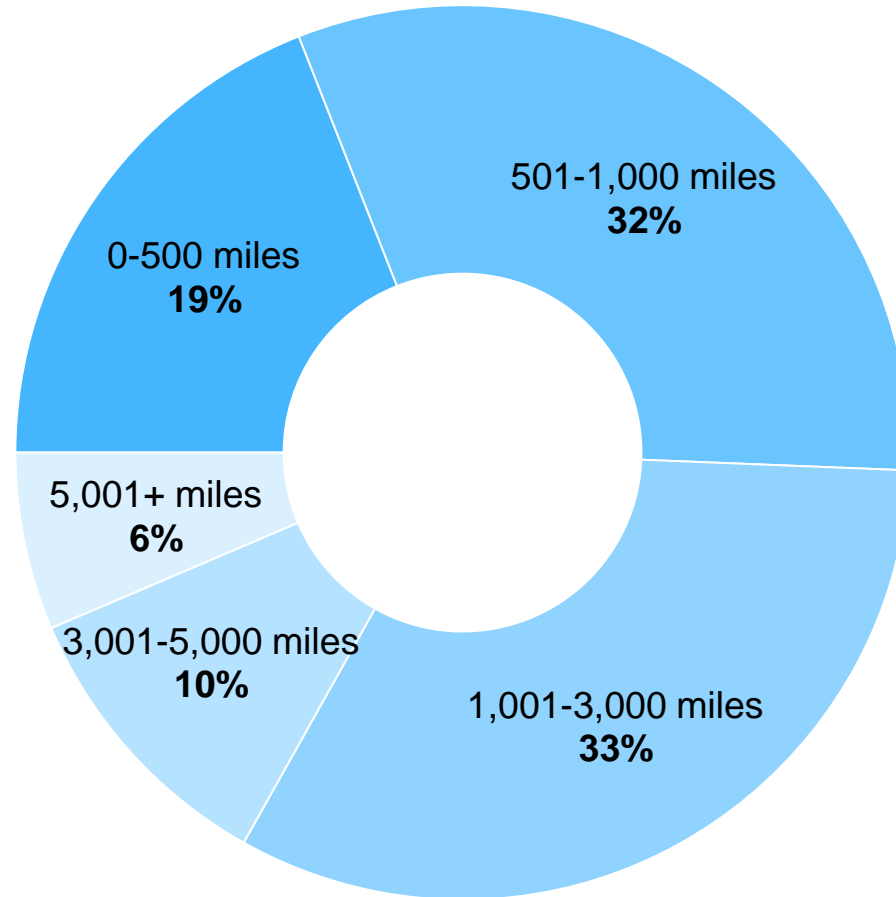


\$199.23

Ave. Per Person Per Day Spend

U.S. Long-Distance Travelers: Annual Vacation

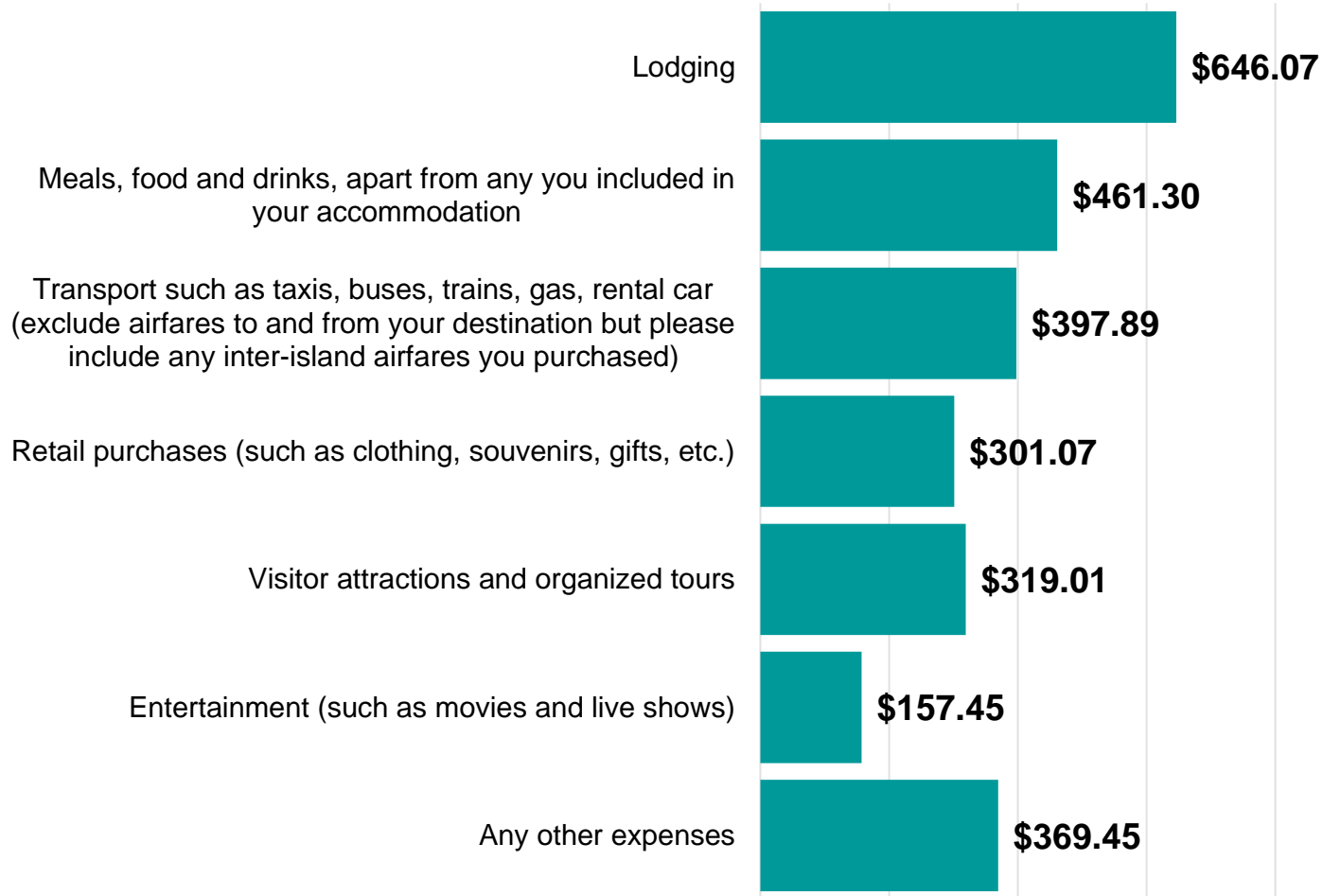
Distance Travelled on Annual Vacation



Sample Size: n=267

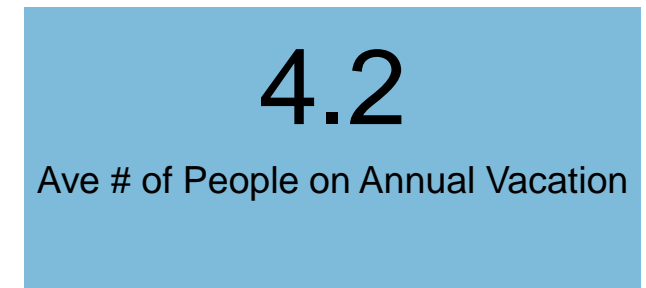
U.S. Long-Distance Travelers: Annual Vacation

Average Spend



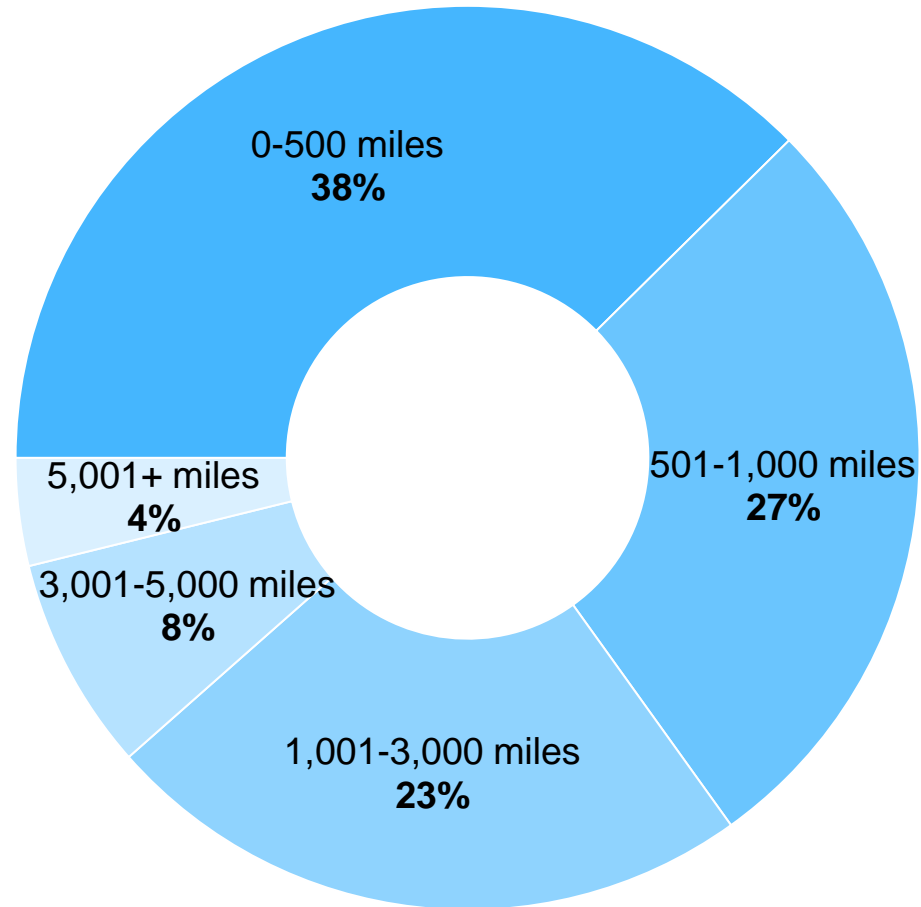
Sample Size: n=267

Spend Per Person Per Day



U.S. Nat Rep: Annual Vacation

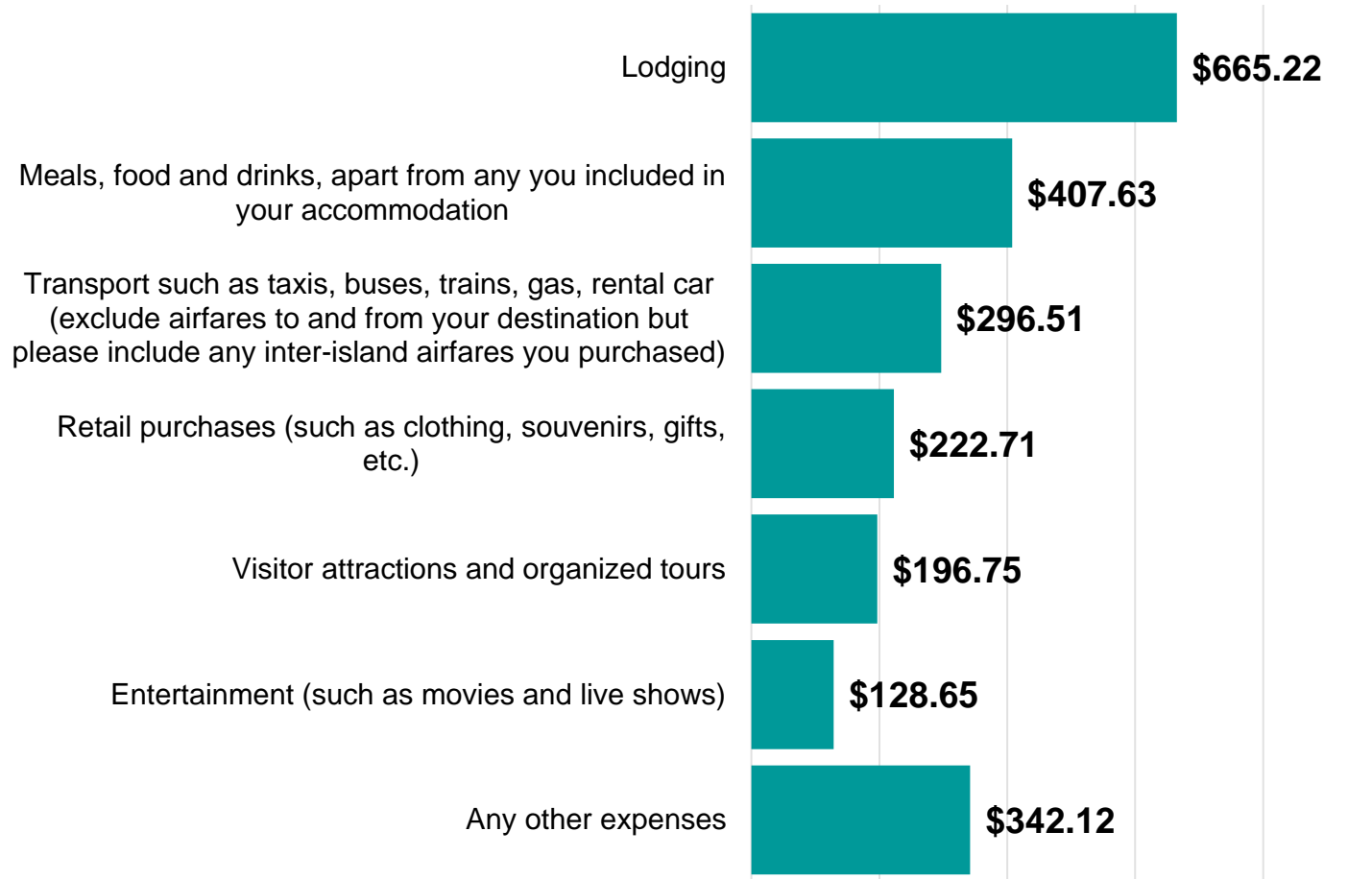
Distance Travelled on Annual Vacation



Sample Size: n=1,771

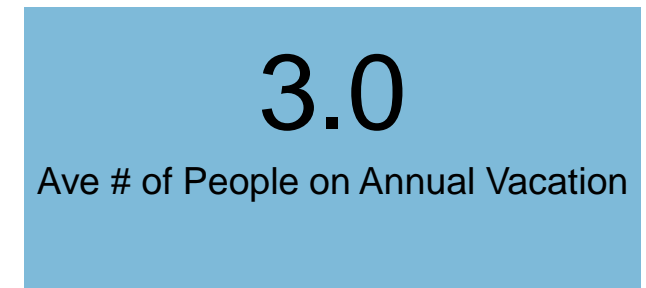
U.S. Nat Rep: Annual Vacation

Average Spend



Sample Size: n=1,771

Spend Per Person Per Day



U.S. - Importance of Travel Factors

	Very Important 5			
	US: Avid Traveler \$100k+	US: Avid Traveler \$150k+	US: Long-Distance Air Traveler under 55	US Market
Comfort and accessibility	59%	59%	56%	54%
Value for money	65%	53%	55%	58%
Entertainment and nightlife	32%	32%	41%	27%
Consideration of sustainable principles	31%	22%	36%	25%
Natural attractions/activities	59%	70%	54%	47%
Cultural attractions	50%	60%	40%	34%
Opportunity to experience local restaurants/businesses	50%	45%	46%	42%
Family-friendly location and activities	62%	65%	51%	42%
Safe and Secure Destination	72%	77%	66%	67%

Sample Size:

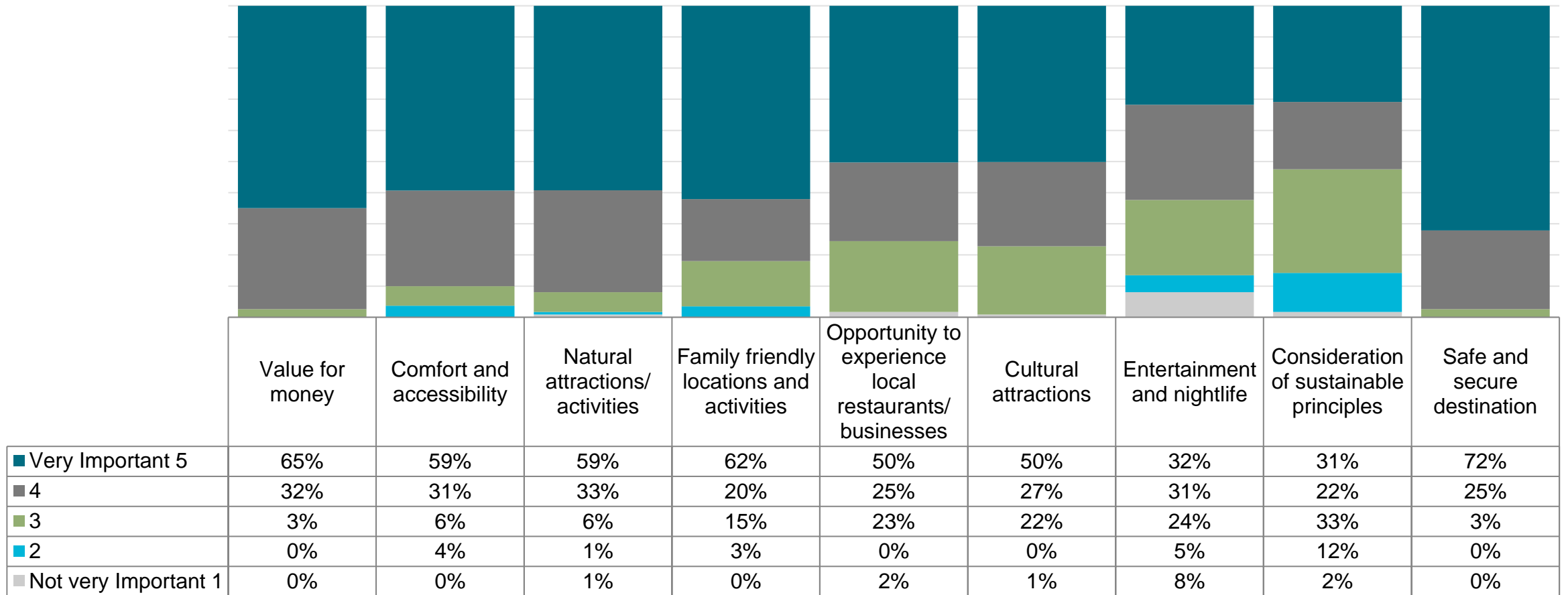
n=58

n=20

n=267

n=1,771

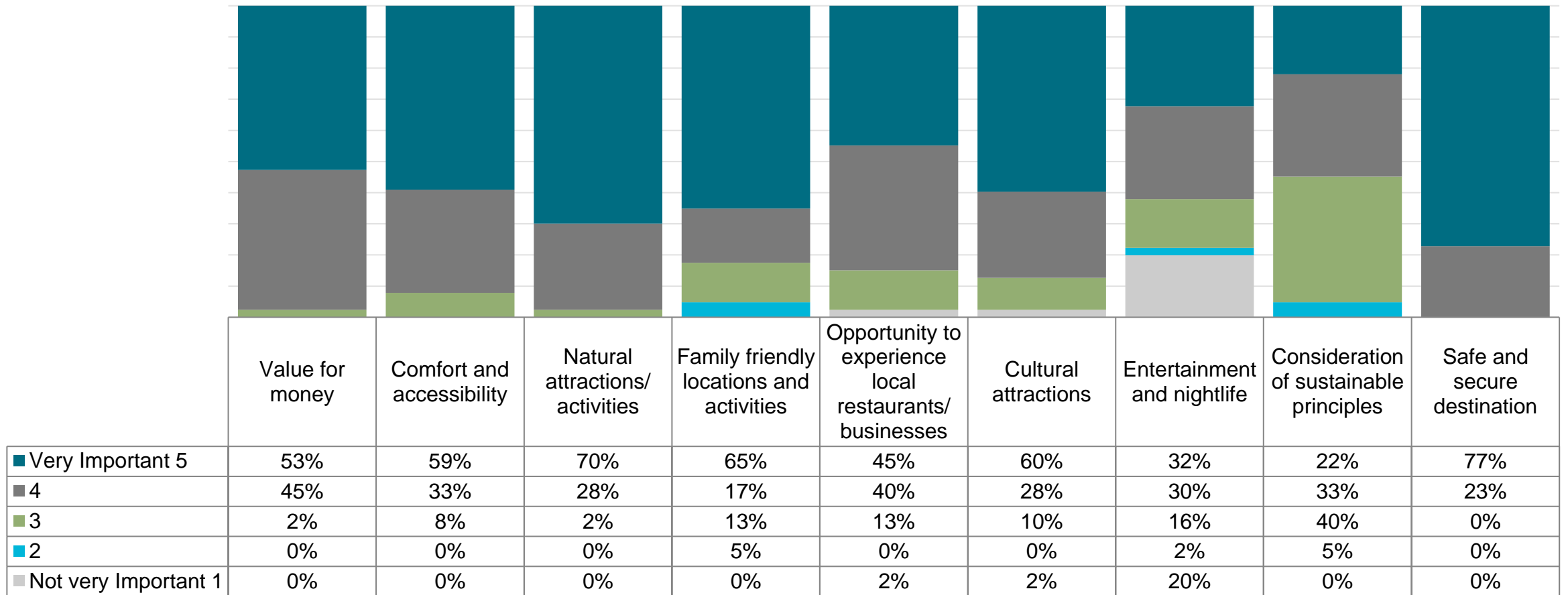
U.S. Avid Travelers \$100k+: Importance of Travel Factors



Not very Important 1
 2
 3
 4
 Very Important 5

Sample Size: n=58

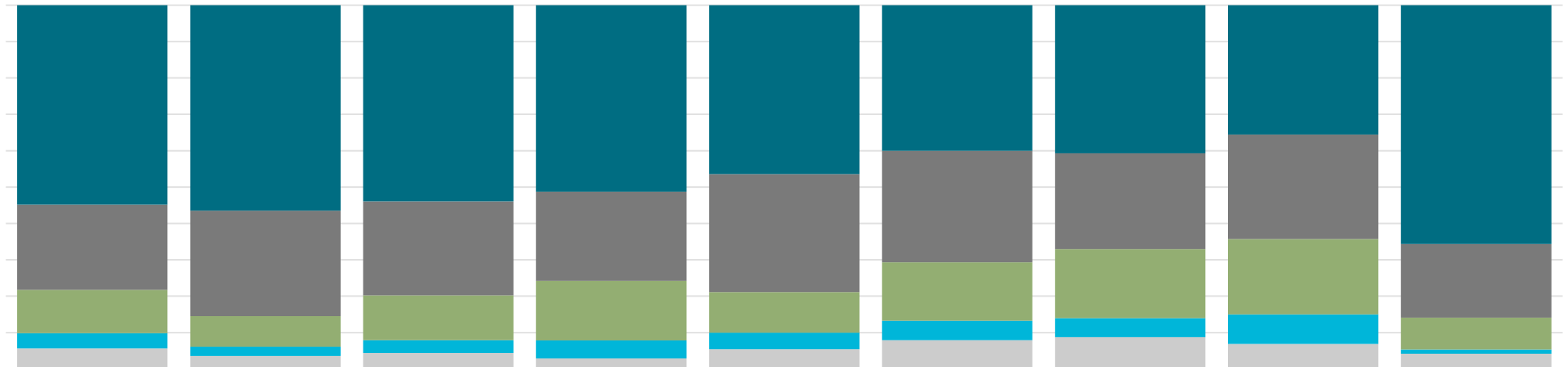
U.S. Avid Travelers \$150k+: Importance of Travel Factors



■ Not very Important 1
 ■ 2
 ■ 3
 ■ 4
 ■ Very Important 5

Sample Size: n=20

U.S. Long Distance Travelers: Importance of Travel Factors

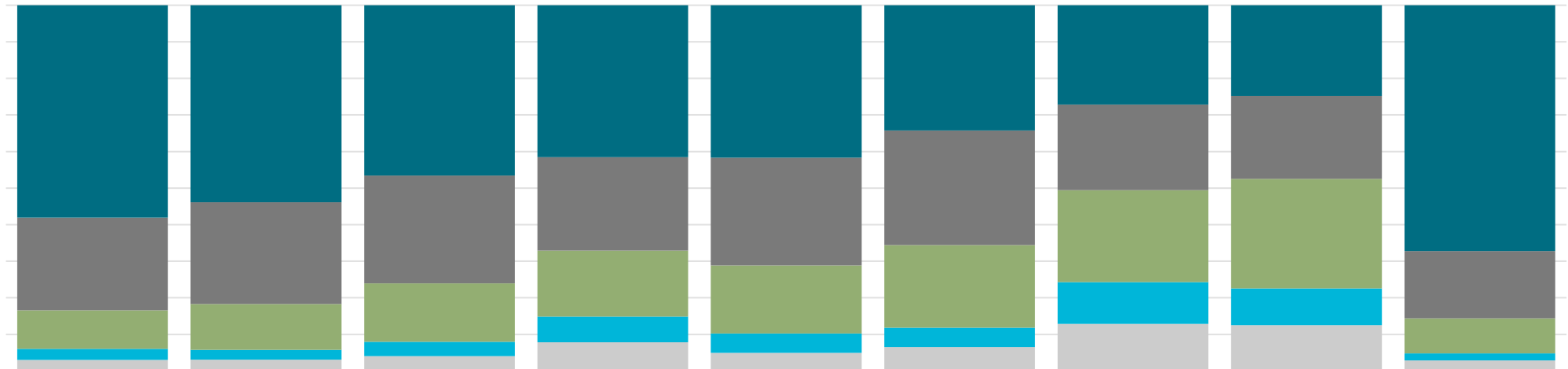


	Value for money	Comfort and accessibility	Natural attractions/activities	Family friendly locations and activities	Opportunity to experience local restaurants/businesses	Cultural attractions	Entertainment and nightlife	Consideration of sustainable principles	Safe and secure destination
Very Important 5	55%	56%	54%	51%	46%	40%	41%	36%	66%
4	23%	29%	26%	24%	32%	31%	26%	29%	20%
3	12%	8%	12%	16%	11%	16%	19%	21%	9%
2	4%	3%	3%	5%	5%	5%	5%	8%	1%
Not very Important 1	6%	4%	4%	3%	5%	8%	9%	7%	4%

Not very Important 1
 2
 3
 4
 Very Important 5

Sample Size: n=267

U.S. Nat Rep: Importance of Travel Factors



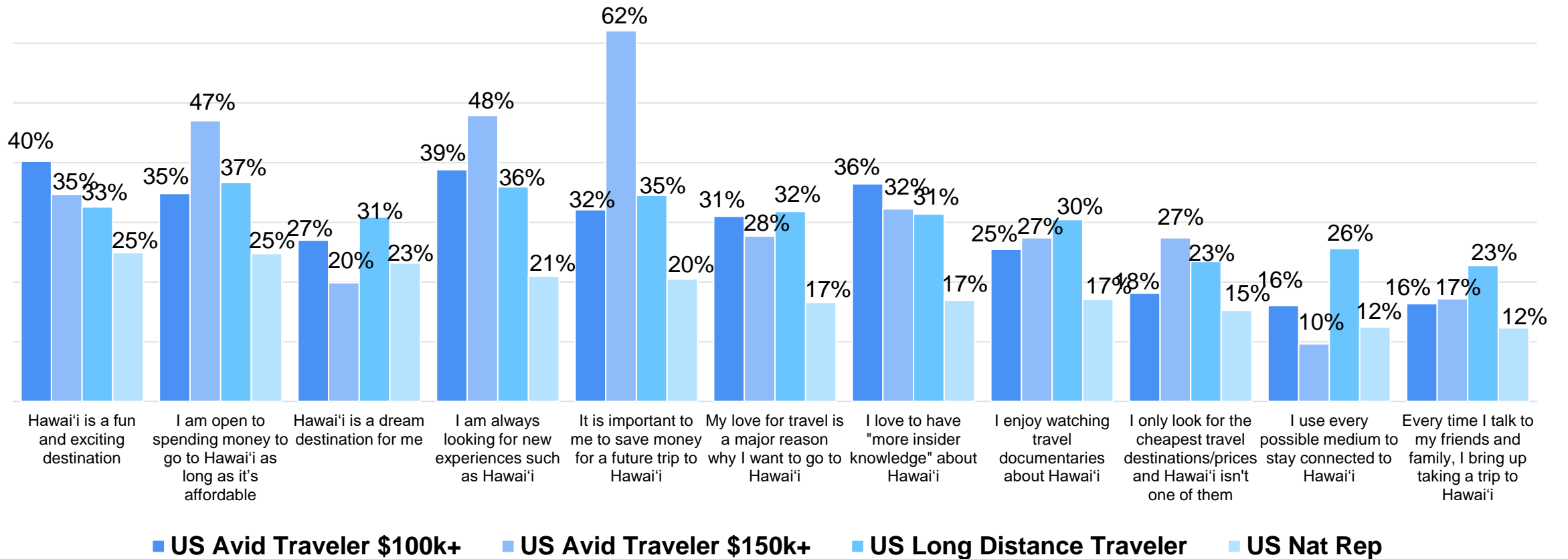
	Value for money	Comfort and accessibility	Natural attractions/activities	Family friendly locations and activities	Opportunity to experience local restaurants/businesses	Cultural attractions	Entertainment and nightlife	Consideration of sustainable principles	Safe and secure destination
Very Important 5	58%	54%	47%	42%	42%	34%	27%	25%	67%
4	25%	28%	29%	26%	30%	31%	23%	23%	18%
3	11%	12%	16%	18%	19%	23%	25%	30%	10%
2	3%	3%	4%	7%	5%	5%	11%	10%	2%
Not very Important 1	3%	3%	4%	8%	5%	7%	13%	12%	3%

Not very Important 1
 2
 3
 4
 Very Important 5

Sample Size: n=1,771

U.S. - Hawai'i as an Aspirational Destination

Agreement Regarding Hawai'i as a Travel Destination (Strongly Agree)



Sample Size:

n=58

n=20

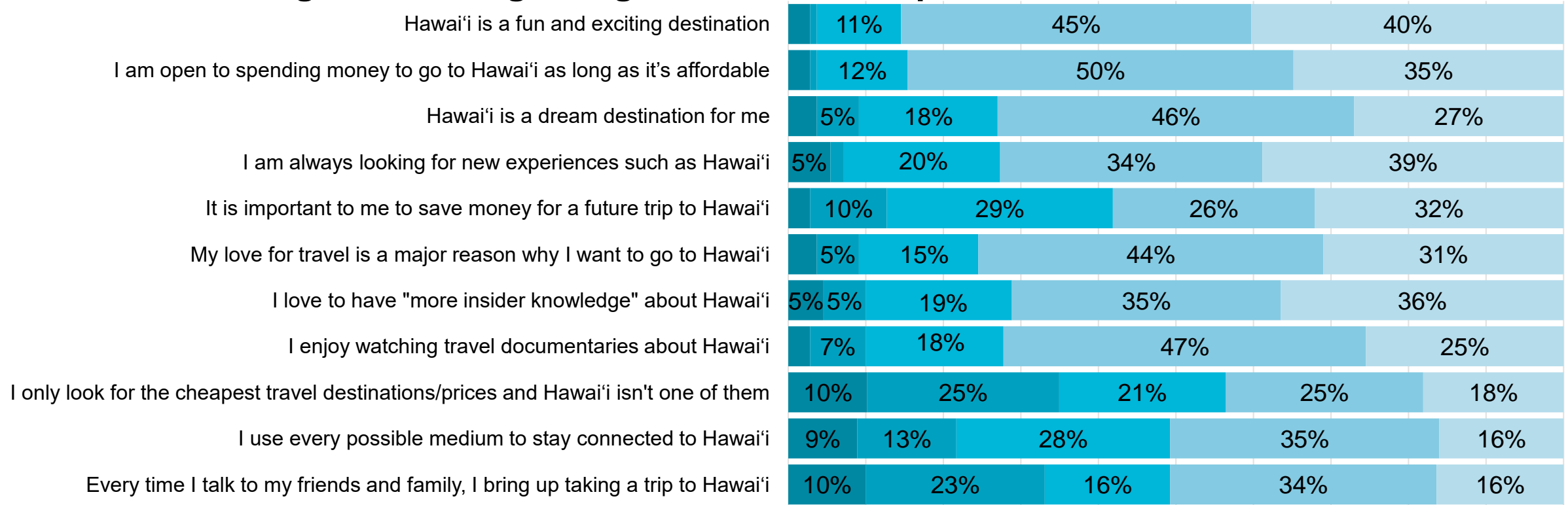
N=267

n=1,771

Please tell us how much you agree or disagree with each statement below about Hawai'i as a travel destination to you?

U.S. Avid Travelers \$100k+: Hawai'i as an Aspirational Destination

Agreement Regarding Hawai'i as an Aspirational Destination

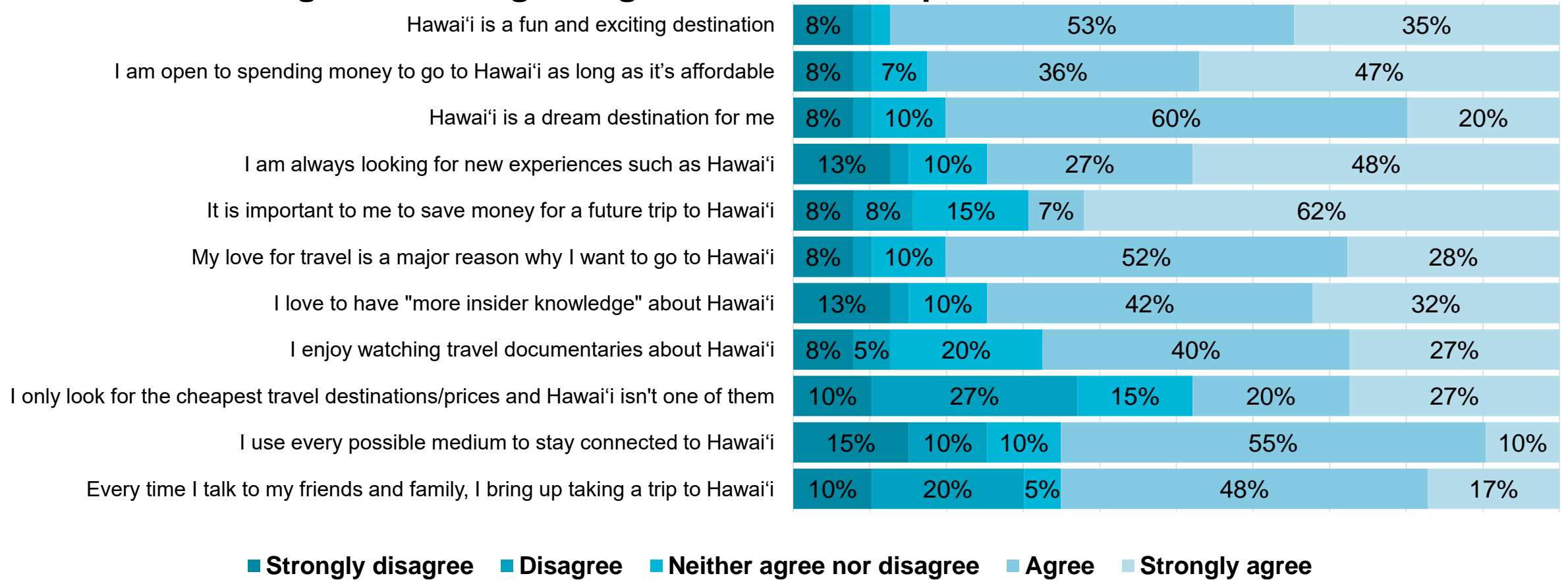


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=58

U.S. Avid Travelers \$150k+: Hawai'i as an Aspirational Destination

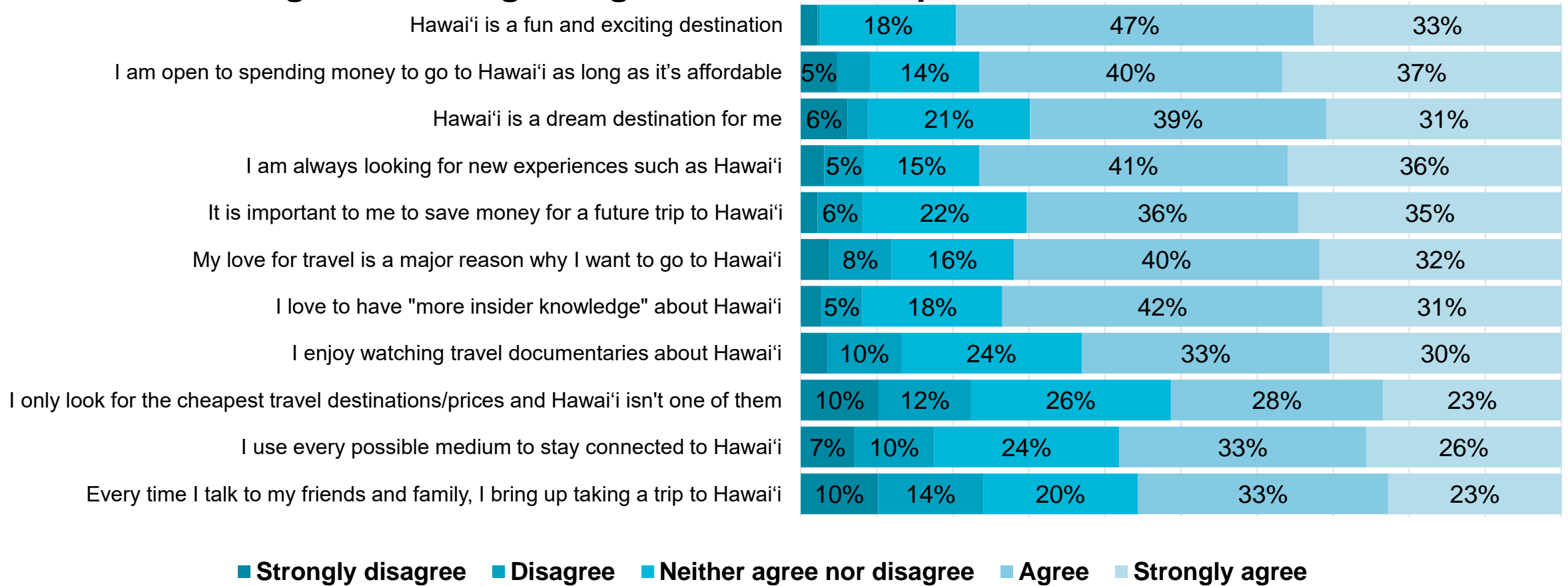
Agreement Regarding Hawai'i as an Aspirational Destination



Sample Size: n=20

U.S. Long Distance Traveler: Hawai'i as an Aspirational Destination

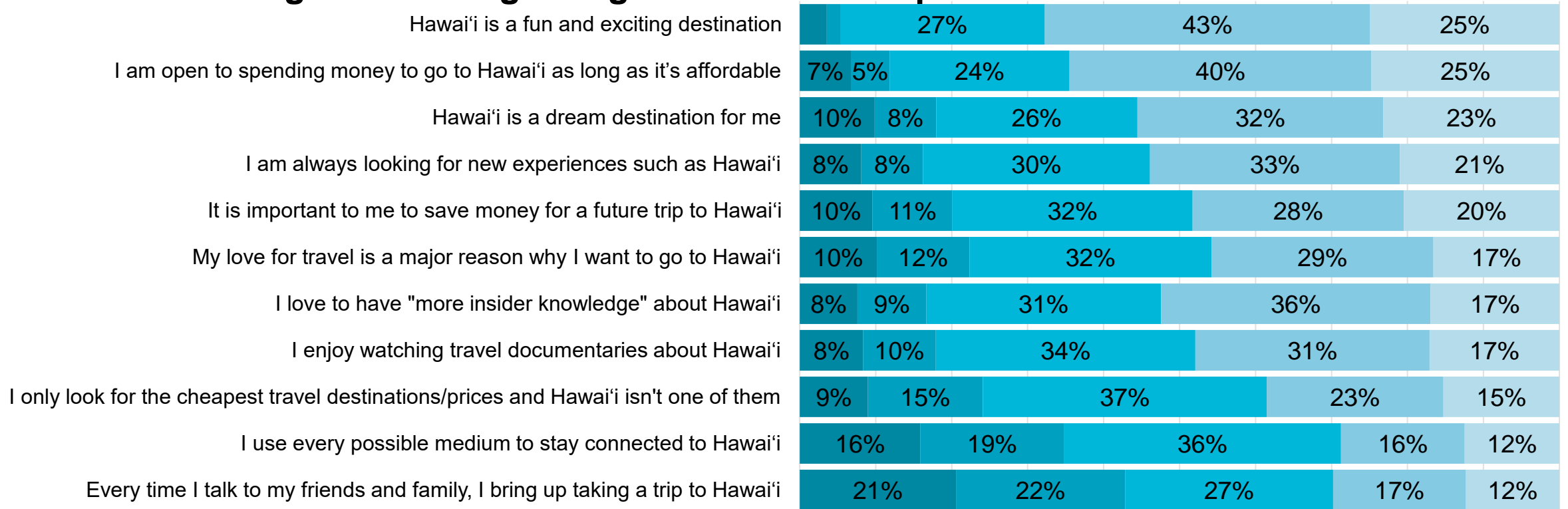
Agreement Regarding Hawai'i as an Aspirational Destination



Sample Size: n=267

U.S. Nat Rep: Hawai'i as an Aspirational Destination

Agreement Regarding Hawai'i as an Aspirational Destination

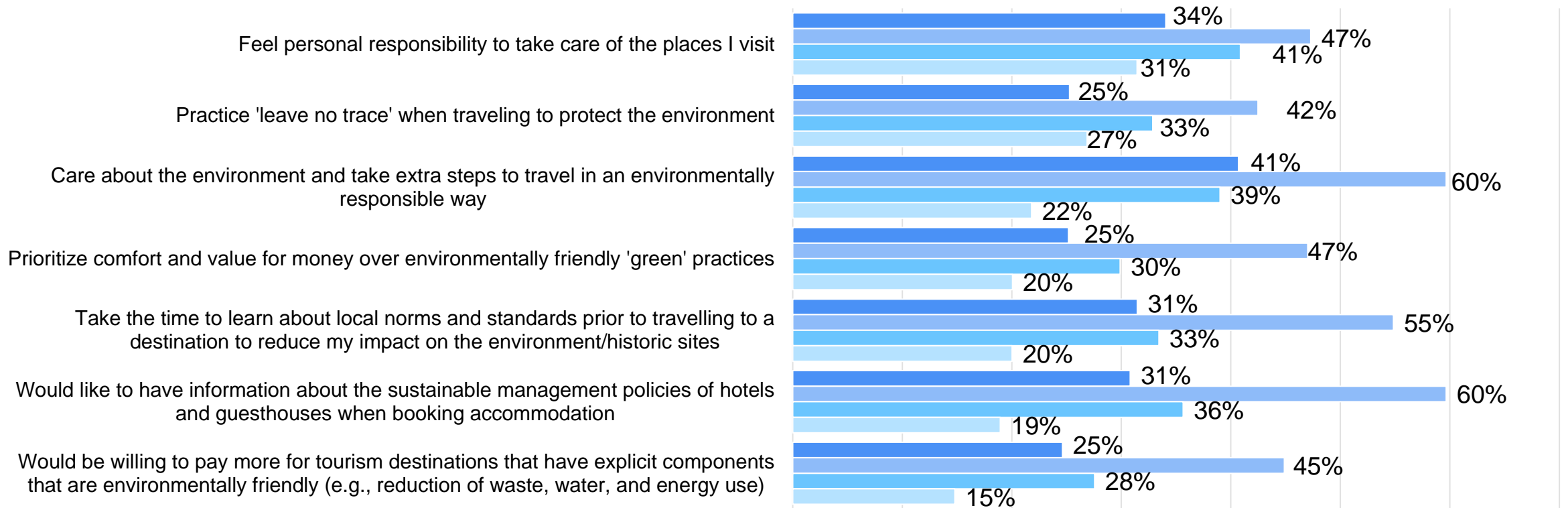


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=1,771

U.S. - Sustainability and Travel Responsibility Statements

Agreement Regarding Sustainable Practices While Traveling (Strongly Agree)



■ US Avid Traveler \$100k+

■ US Avid Traveler \$150k+

■ US Long Distance Traveler

■ US Nat Rep

Sample Size:

n=58

n=20

n=267

n=1,771

U.S. - Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling (Strongly Agree)



■ US Avid Traveler \$100k+
 ■ US Avid Traveler \$150k+
 ■ US Long Distance Traveler
 ■ US Nat Rep

Sample Size:

n=58

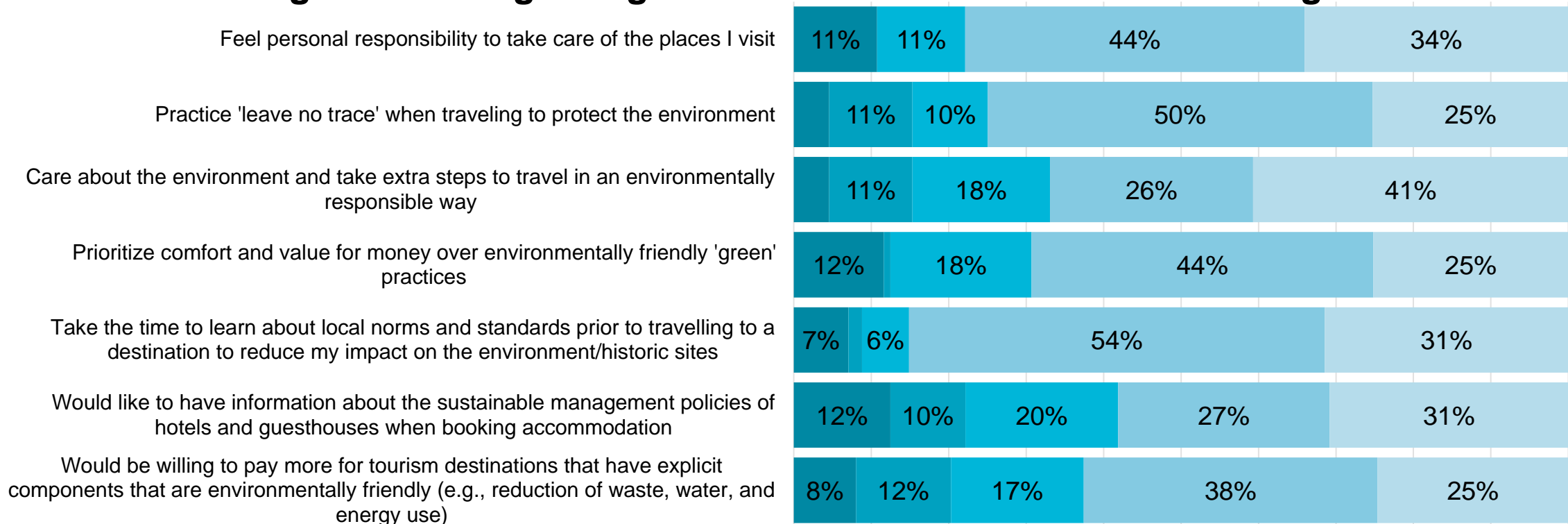
n=20

n=267

n=1,771

U.S. Avid Travelers \$100k+: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustainable Practices While Traveling

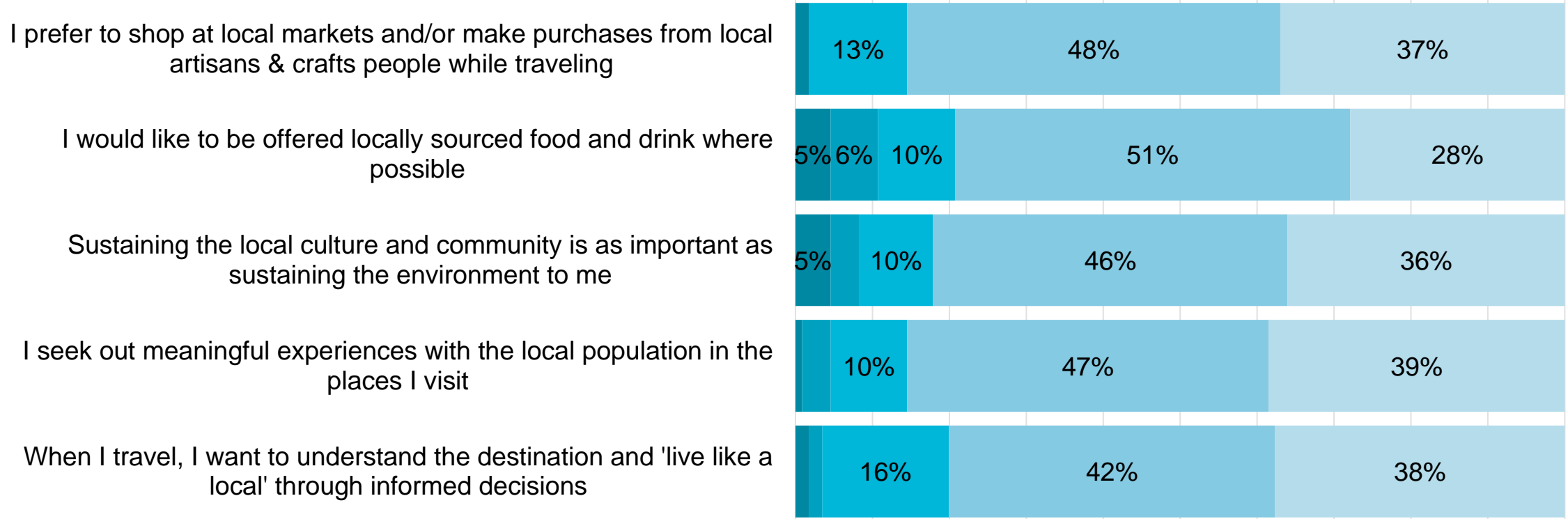


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=58

U.S. Avid Travelers \$100k+: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling

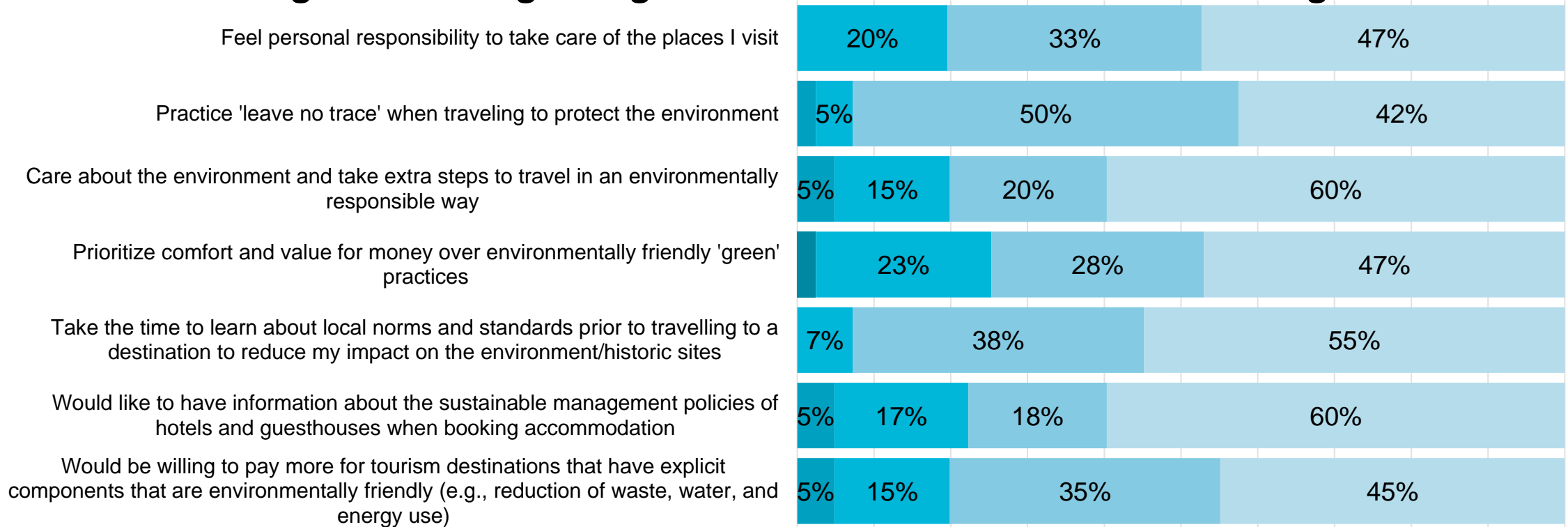


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=58

U.S. Avid Travelers \$150k+: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustainable Practices While Traveling

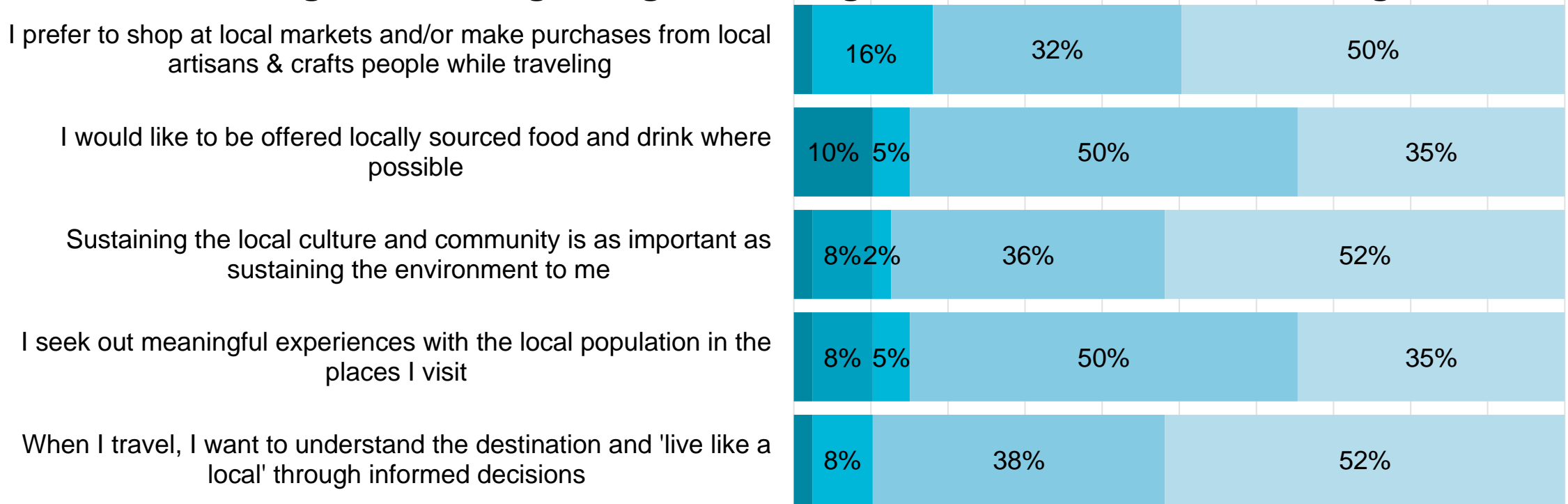


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=20

U.S. Avid Travelers \$150k+: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling

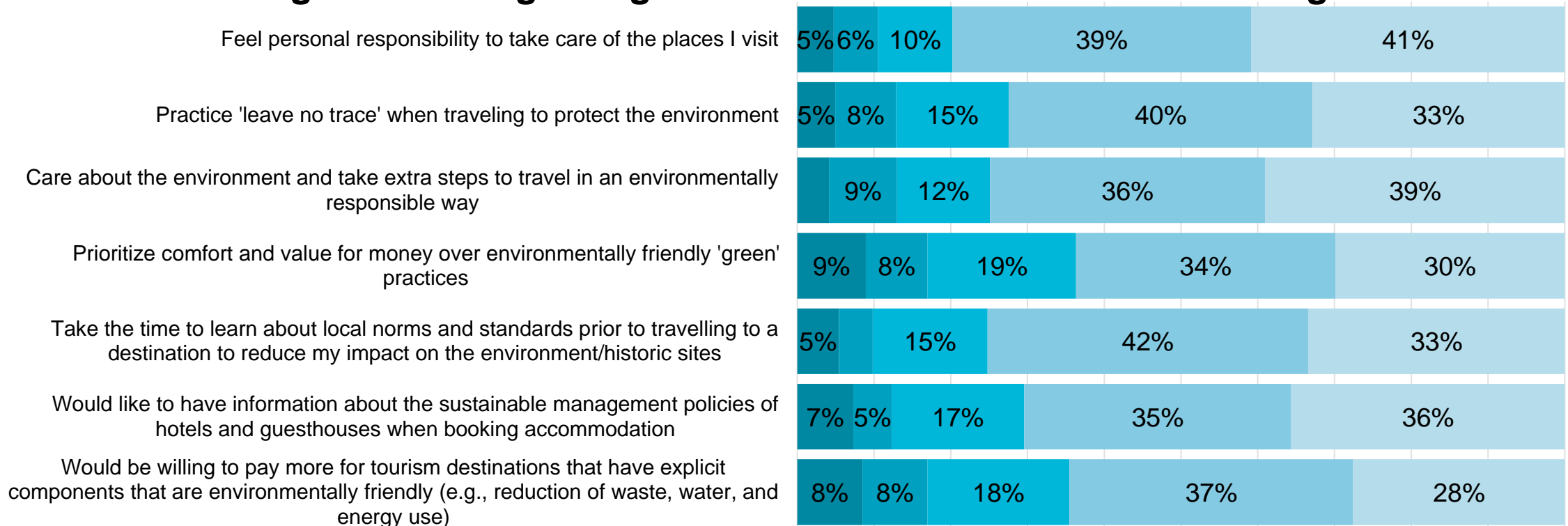


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=20

U.S. Long Distance Traveler: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustainable Practices While Traveling

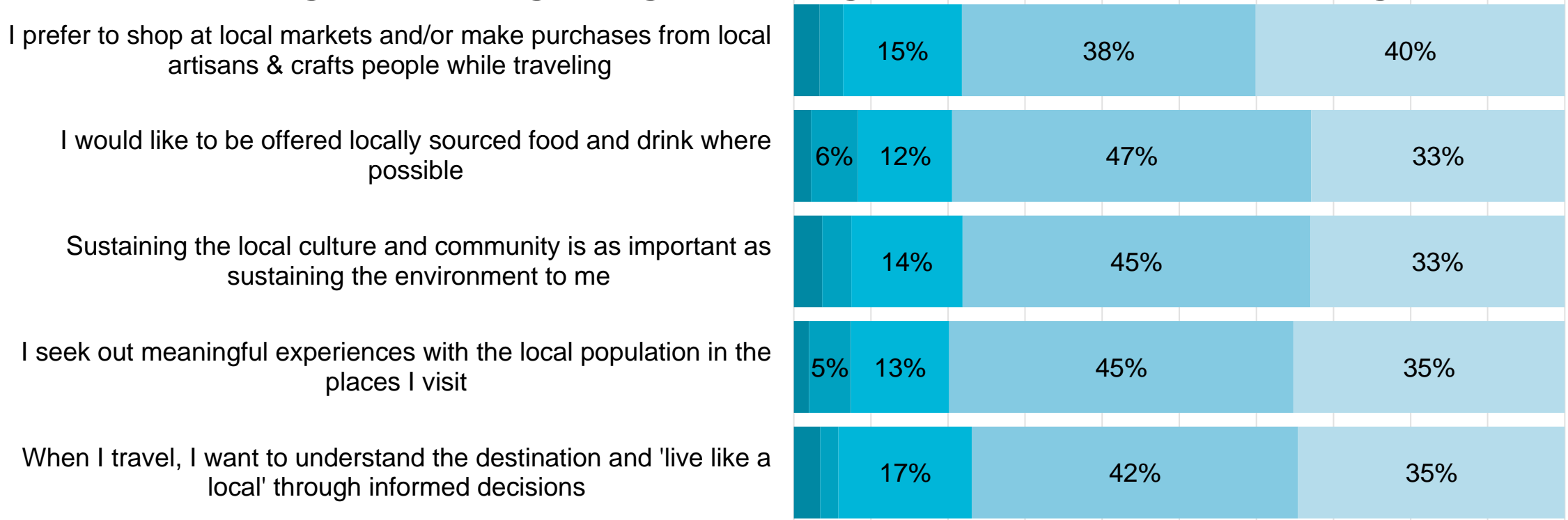


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=267

U.S. Long Distance Traveler: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling

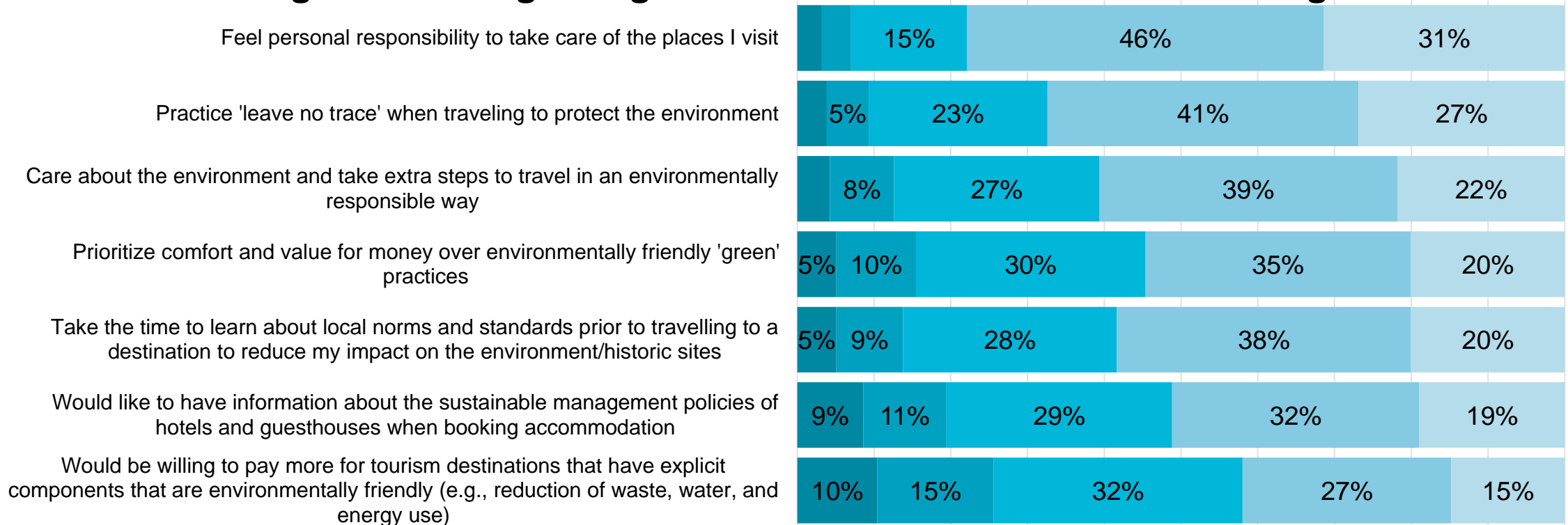


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=267

U.S. Nat Rep: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustainable Practices While Traveling

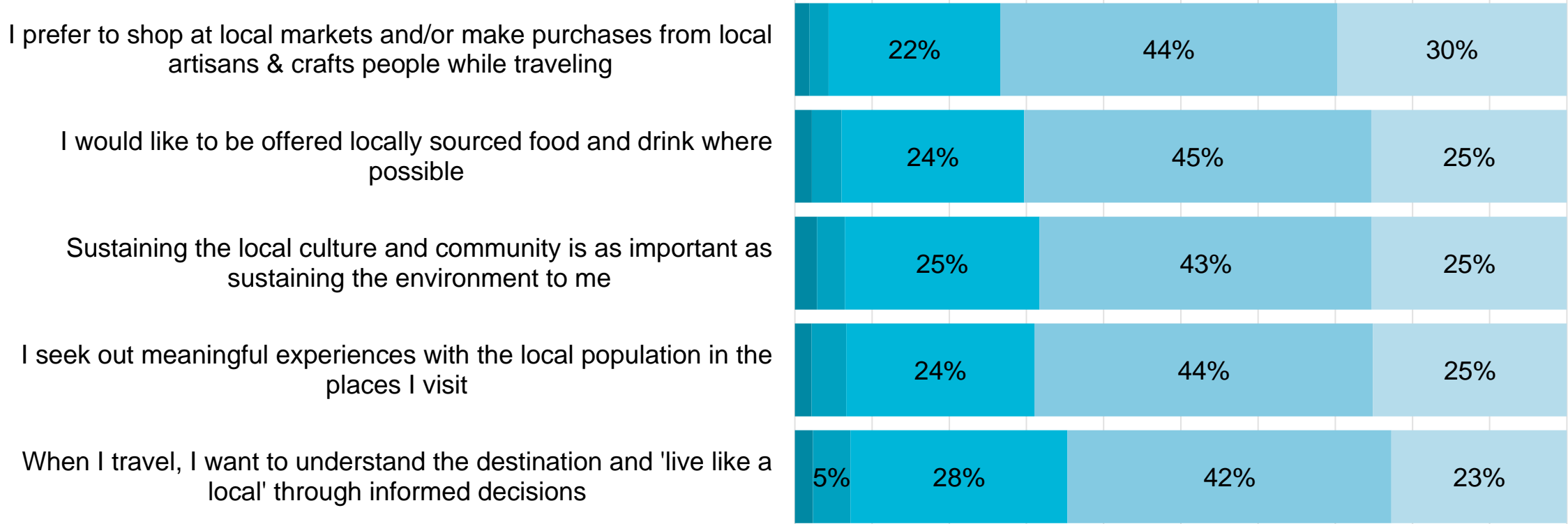


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=1,771

U.S. Nat Rep: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling

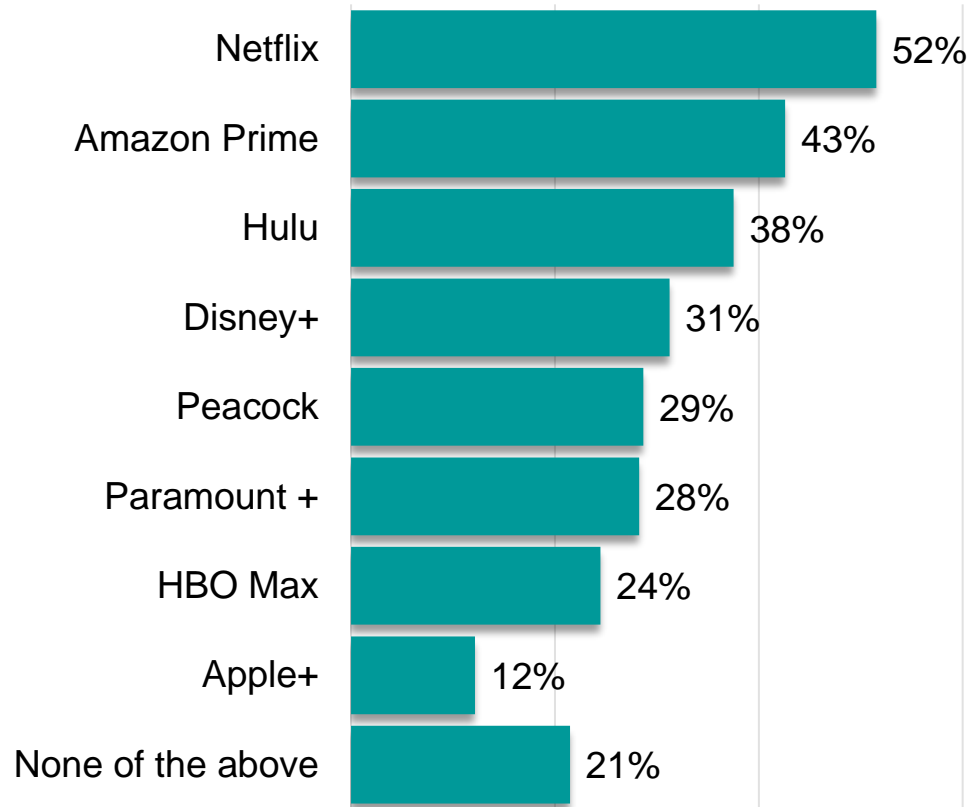


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

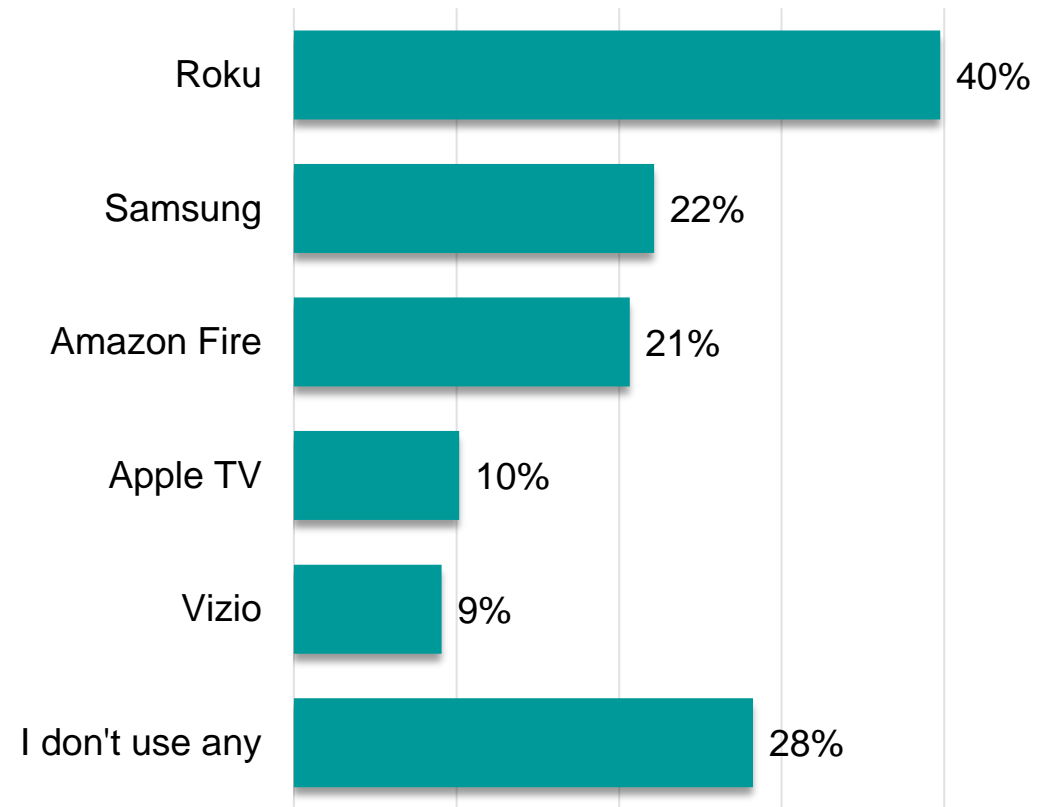
Sample Size: n=1,771

U.S. Media Consumption

Streaming Platforms Used Weekly



Connected Device Used

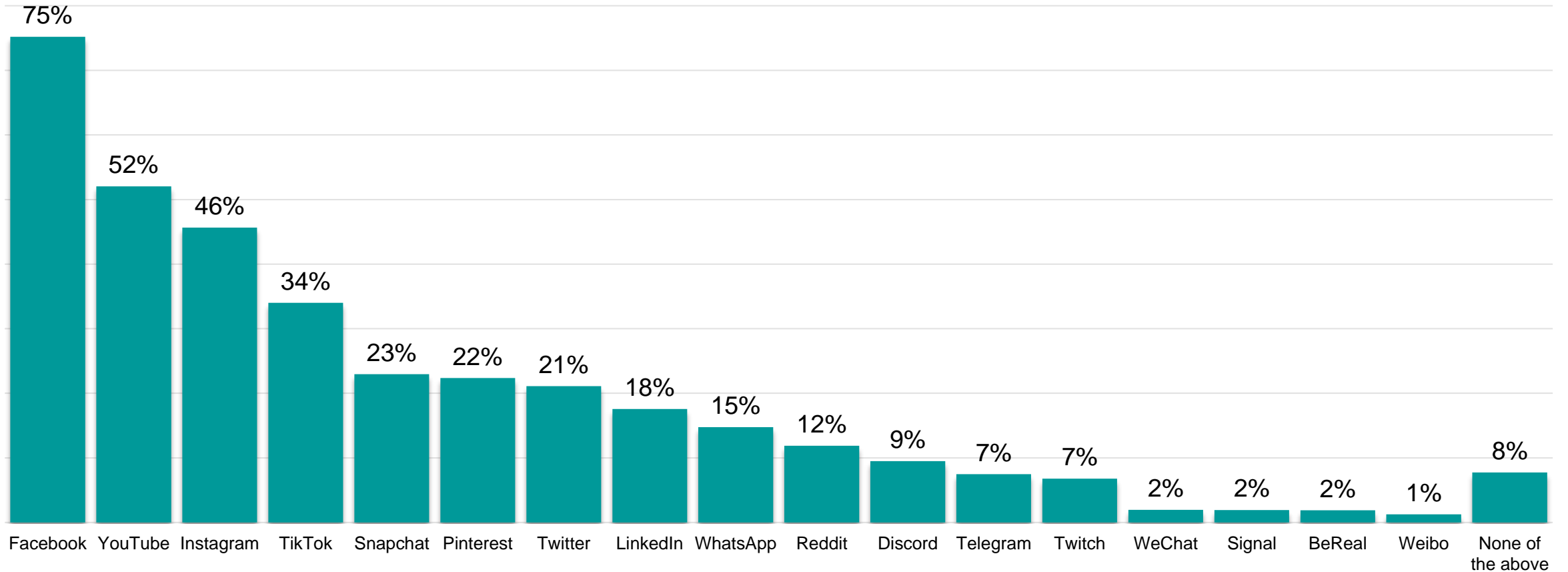


Sample Size: n=1,771

Which of the following streaming platforms do you view on a weekly basis, if any? Select all that apply. | Which Connected TV/Streaming Device do you currently use to view content? | Which of the following social media platforms and/or instant messaging apps have you used in the past week? | In which of the following ways did you become aware of various travel destinations to consider? | After seeing a travel destination, whether on TV, online, through social media or other channels, what actions do you typically take? **Select all that apply**

U.S. Media Consumption

Social Media Platforms Used Weekly



Sample Size: n=1,771

Which of the following streaming platforms do you view on a weekly basis, if any? Select all that apply. | Which Connected TV/Streaming Device do you currently use to view content? | Which of the following social media platforms and/or instant messaging apps have you used in the past week? | In which of the following ways did you become aware of various travel destinations to consider? | After seeing a travel destination, whether on TV, online, through social media or other channels, what actions do you typically take? **Select all that apply**

U.S. Media Consumption

Travel Destination Source of Awareness

Friends/Family	46%
Online	35%
Social Media	39%
TV commercials	32%
YouTube	29%
TV Program/Documentary	23%
Email	15%
Radio	9%
Newspaper	7%
Out of home advertising (e.g. Poster Billboards, bus shelter advertisements, etc.)	8%
I don't recall	13%

Actions Taken After Seeing an Ad for a Destination

I search for information about the destination online	46%
I talk to friends/family about the destination	34%
I go to the destination's website	33%
I look up the destination on social media	23%
I book travel to the destination almost immediately	7%
I don't do anything	18%
None of the above	9%

Sample Size: n=1,771