

A man with a grey beard and a red beanie is looking out over a city at night. The city lights are blurred in the background, and mountains are visible in the distance. The overall scene is serene and scenic.

# The State of Global Travel Hawaii Edition

**Future Partners**

**October 2024**

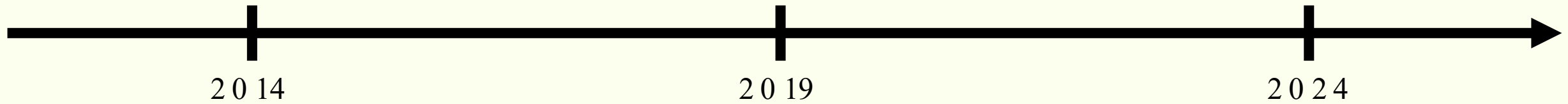


# David Reichbach

Vice President of Development  
[dreichbach@futurepartners.com](mailto:dreichbach@futurepartners.com)



# My history of visiting Hawaii



We're a creative insights firm shaping strategies that capture hearts, minds, and *market share*.

**Future Partners**

# Global Travel Sentiment

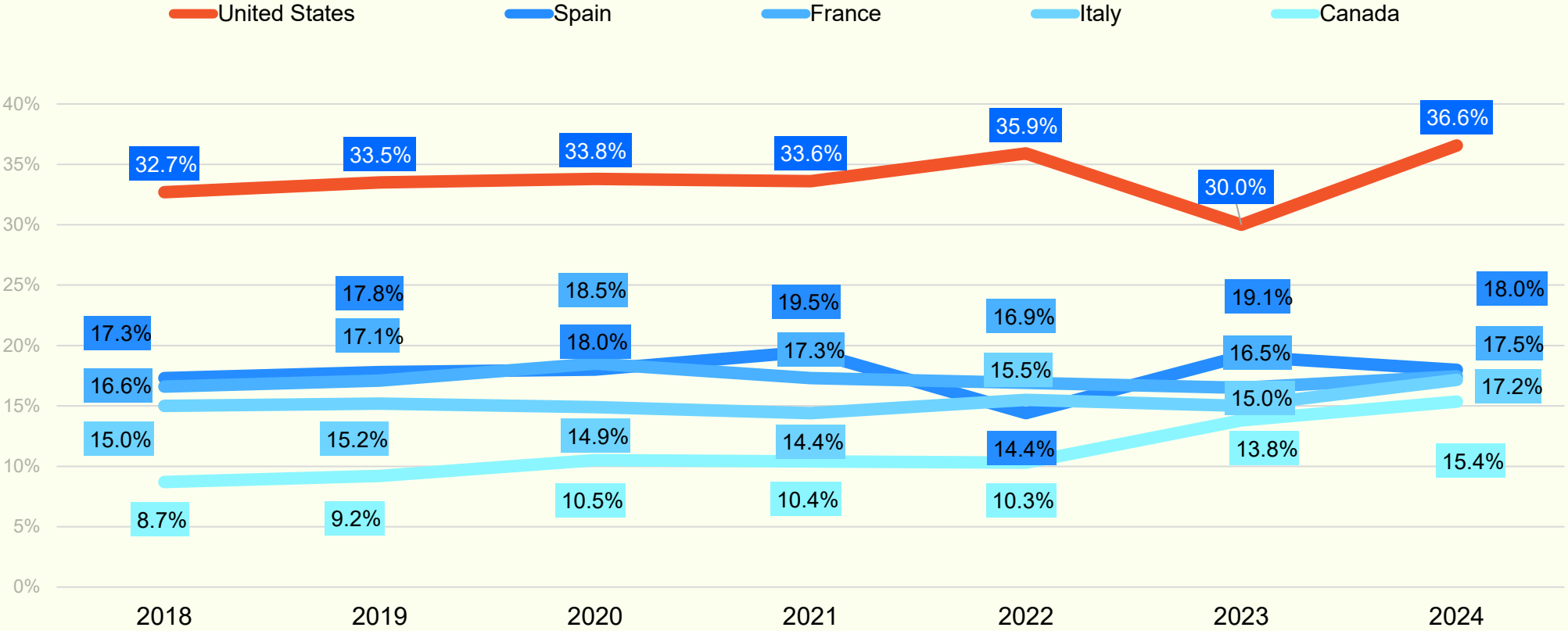
# The State of the International Traveler

- Tracking study conducted since 2014
- Online survey methodology
  - Screened for likely international travel in the next 3 years
- 800 fully completed surveys were collected from a random sample of likely international travelers in each market
- In total, 12,800 completed surveys were collected

	SAMPLE SIZE
Argentina	800
Australia	800
Brazil	800
Canada	800
China	800
Colombia	800
France	800
Germany	800
India	800
Italy	800
Japan	800
Mexico	800
Netherlands	800
South Korea	800
Spain	800
United Kingdom	800
<b>TOTAL</b>	<b>12,800</b>


# The USA Continues to Rank First as a Most Desired International Destination

Most Desired International Destinations: 2018 —2024  
*(Unaided, Total Aggregate)*



# The Netherlands, Spain, France and Germany are the Most Competitive Markets for the USA to Stand Out


Question: What are the three foreign countries that you would most like to visit in the next 12 months?



**Argentina**  
Most Desired Destinations (unaided)



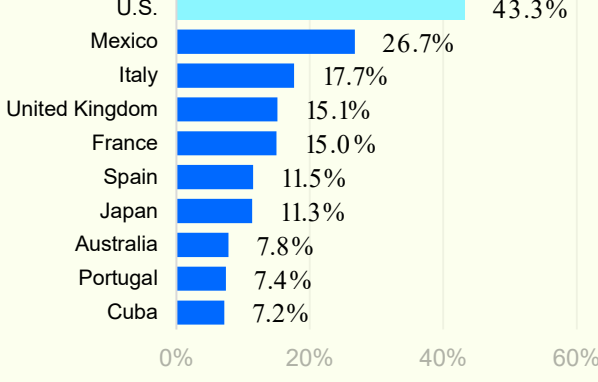
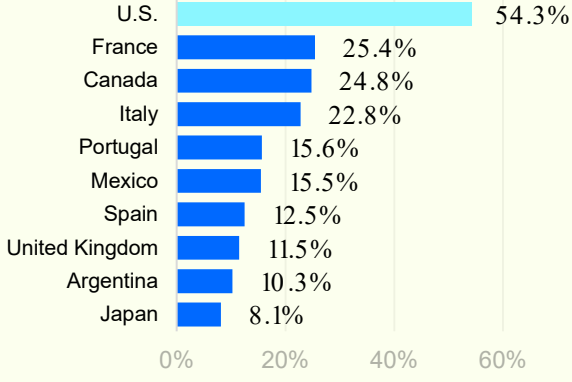
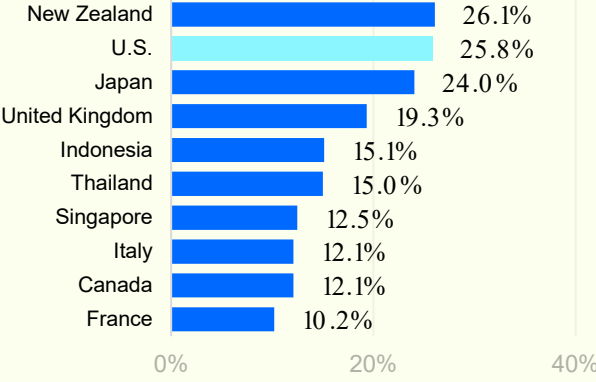
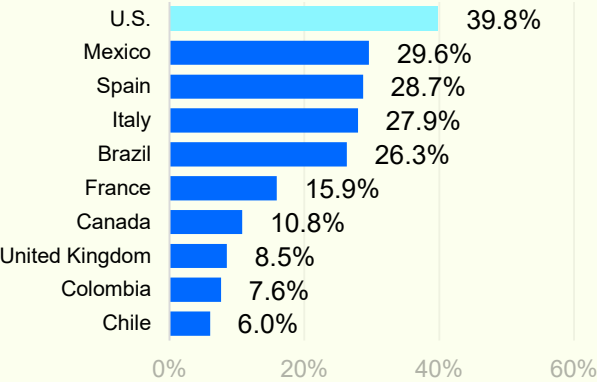
**Australia**  
Most Desired Destinations (unaided)



**Brazil**  
Most Desired Destinations (unaided)




**Canada**  
Most Desired Destinations (unaided)





**China**  
Most Desired Destinations (unaided)



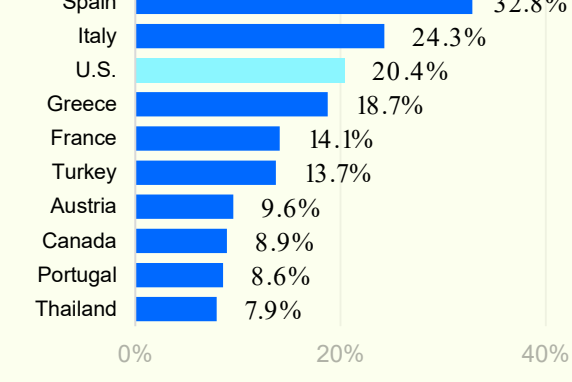
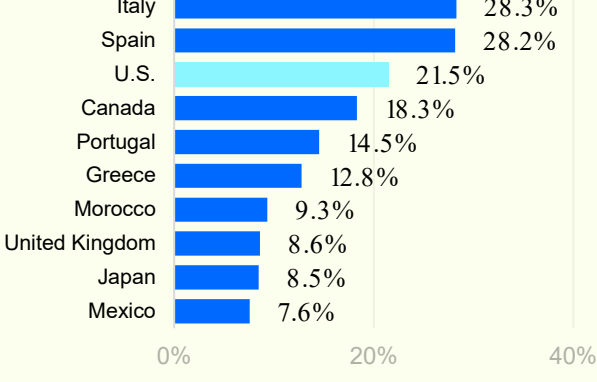
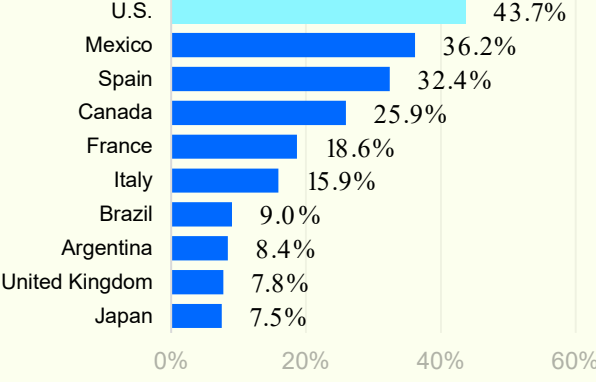
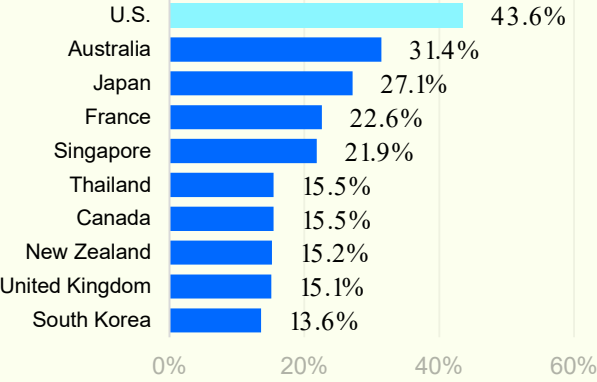
**Colombia**  
Most Desired Destinations (unaided)



**France**  
Most Desired Destinations (unaided)



**Germany**  
Most Desired Destinations (unaided)





# In Mexico, Canada, China, India, Japan, Brazil, Columbia and Argentina, the USA is Exceptionally Competitive as an International Destination Brand

What are the three FOREIGN COUNTRIES that you would most like to visit in the next 12 months?



**India**  
Most Desired Destinations (unaided)



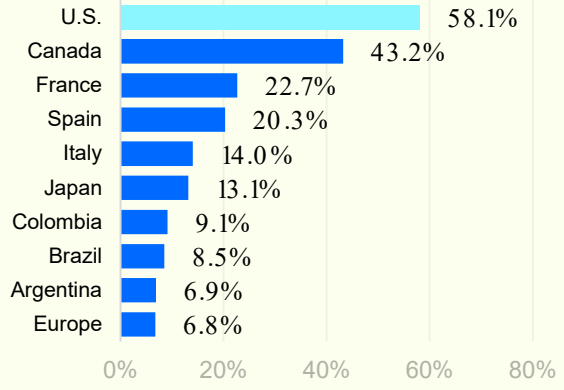
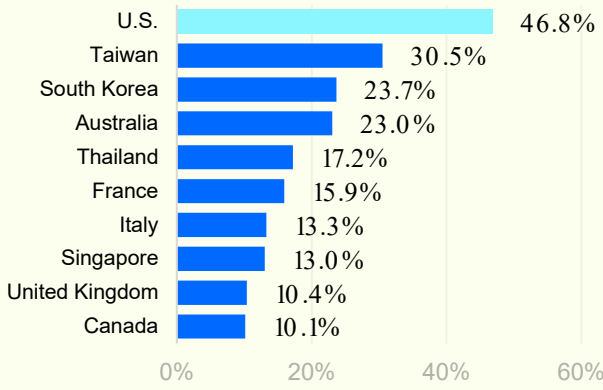
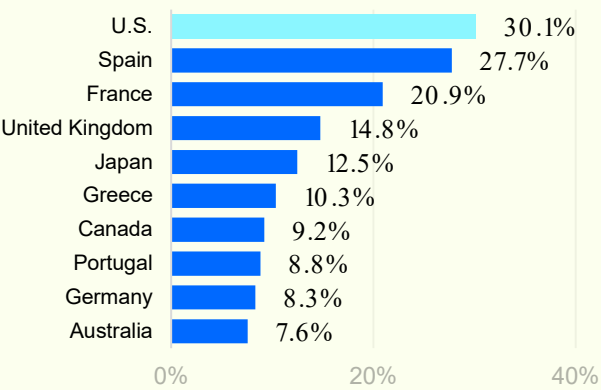
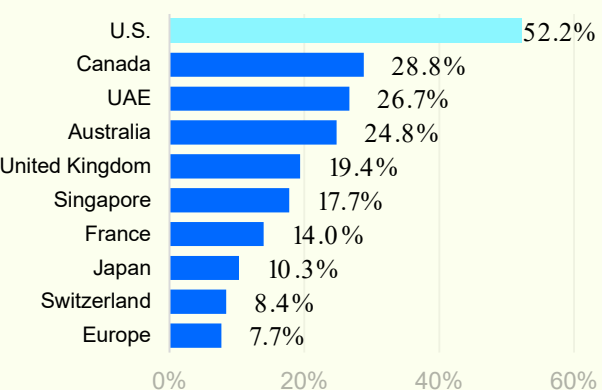
**Italy**  
Most Desired Destinations (unaided)



**Japan**  
Most Desired Destinations (unaided)



**Mexico**  
Most Desired Destinations (unaided)




**Netherlands**  
Most Desired Destinations (unaided)



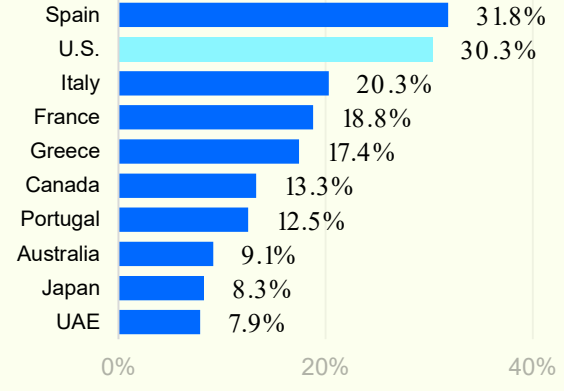
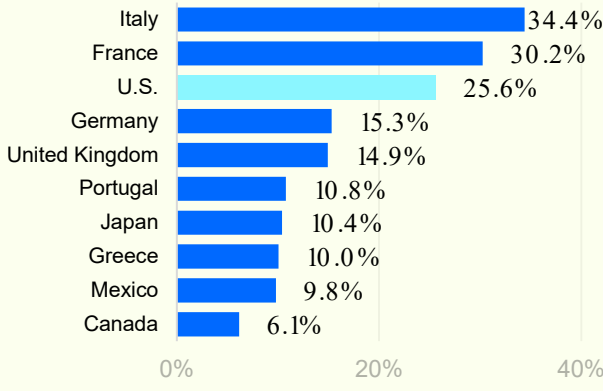
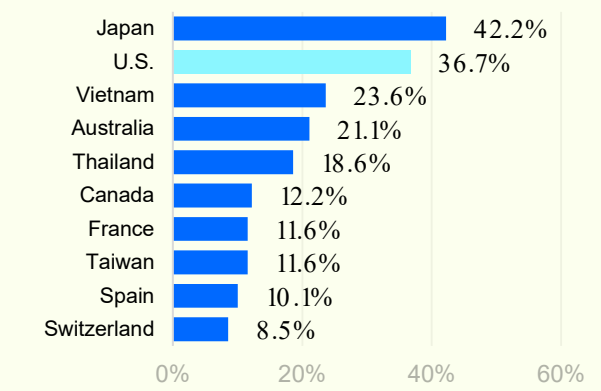
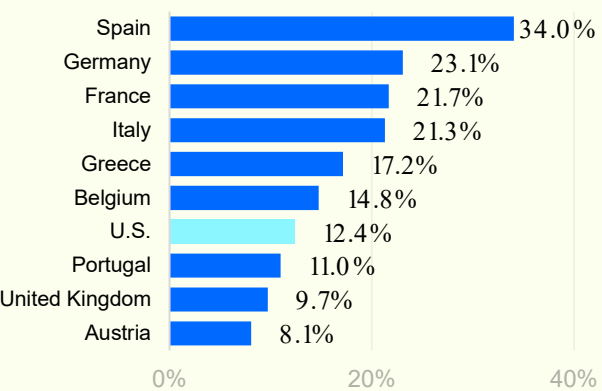
**South Korea**  
Most Desired Destinations (unaided)



**Spain**  
Most Desired Destinations (unaided)



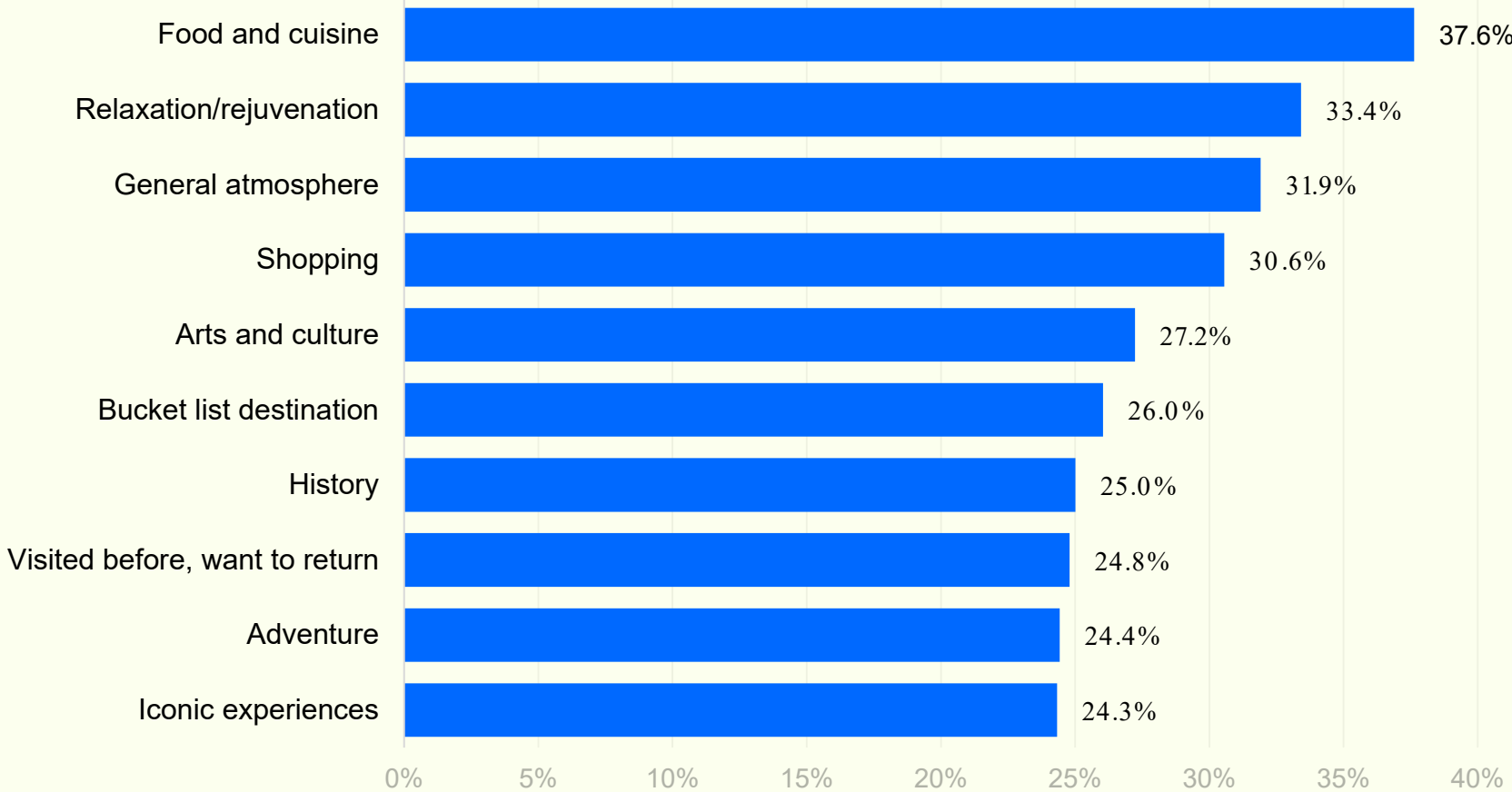
**United Kingdom**  
Most Desired Destinations (unaided)



**Future Partners**

# Aspiration to Visit the USA is Driven by our Food, Shopping, Atmosphere and Opportunities for Rejuvenation

Top 10 Reasons Why Global Travelers Want to Visit the U.S. in the Next Year



# Deterrents to Visiting the U.S.

**Question:** Which best describe your current reasons for not visiting the United States more frequently? (Select all that apply)

Overall Ranking - Deterrents to Visiting the U.S.

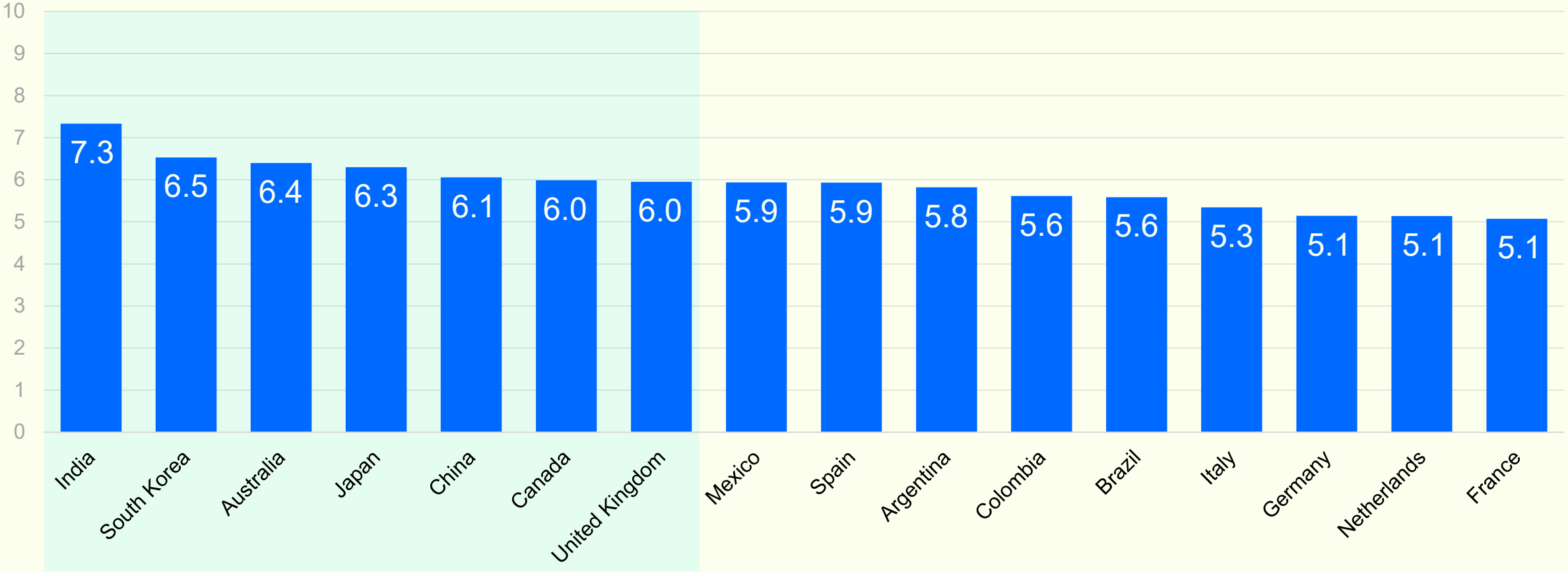


Base: Total (12,800 responses).

# International Travelers Concerns about their Personal Safety in the USA is Elevated

Average Safety Concern Levels by Market  
*Scale of 0 ("Not at all concerned") to 10 ("Extremely high concern")*

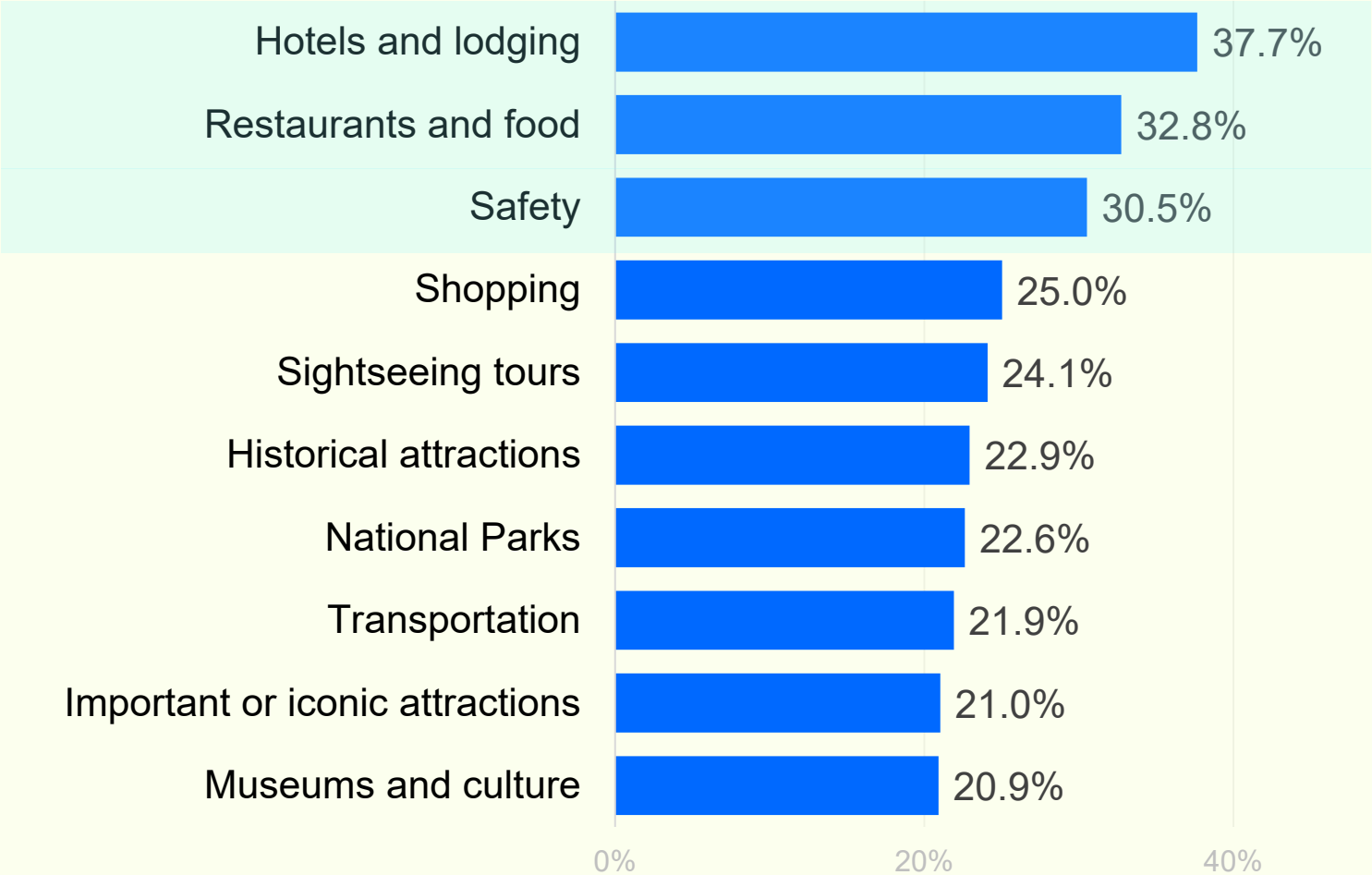
**5.9**  
Aggregate  
average










# Safety is Among the Most Compelling Content for U.S. Destination Decisions

Top 10 Important Content Categories for Destination Decisions  
*% of Total Aggregate*



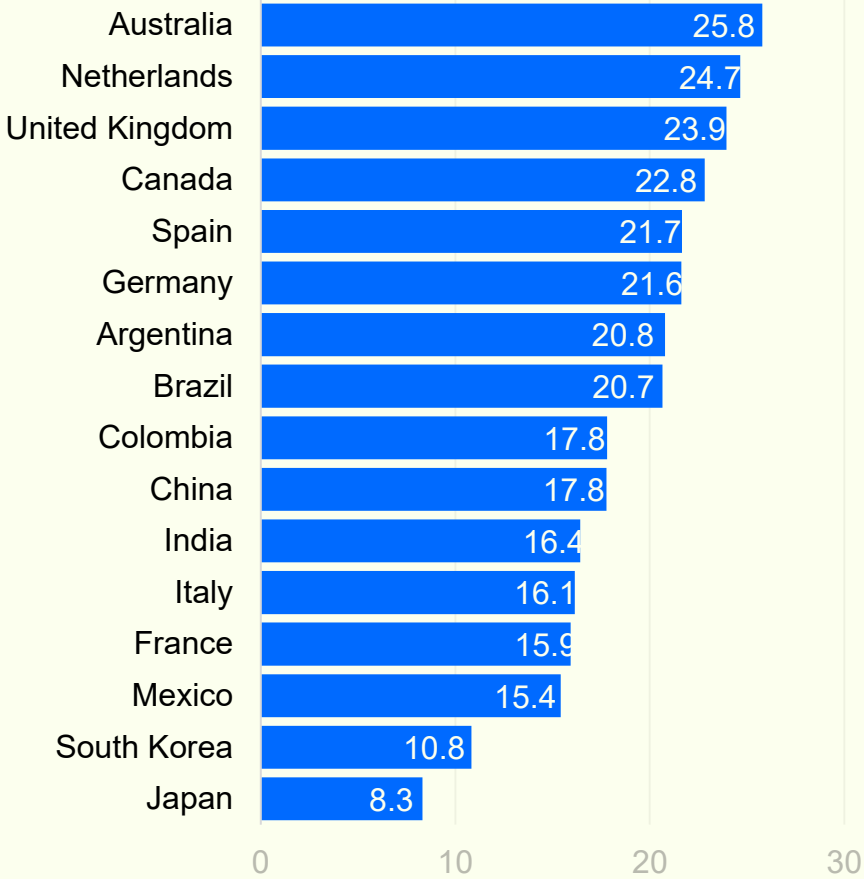
Safety Information

	<i>% of market</i>	<i>ranking</i>
	<b>43.6%</b>	<b>#3</b>
	<b>36.8%</b>	<b>#3</b>
	<b>34.0%</b>	<b>#1</b>
	<b>33.5%</b>	<b>#1</b>
	<b>33.0%</b>	<b>#3</b>

# The Universe of Opportunity to Attract Global Travelers is Strong

## Days Available for International Travel

(Avg. expected # of days available for international travel in upcoming year)



## Annual International Travel Budget

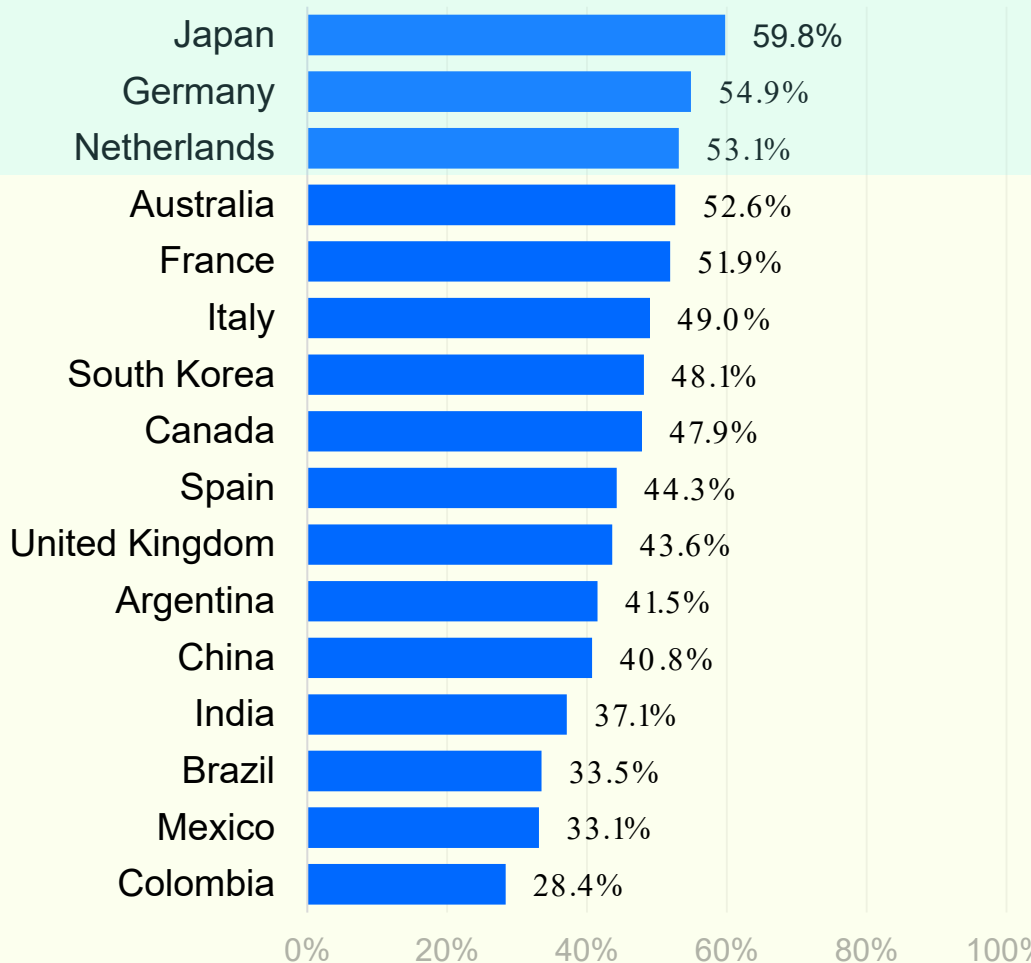
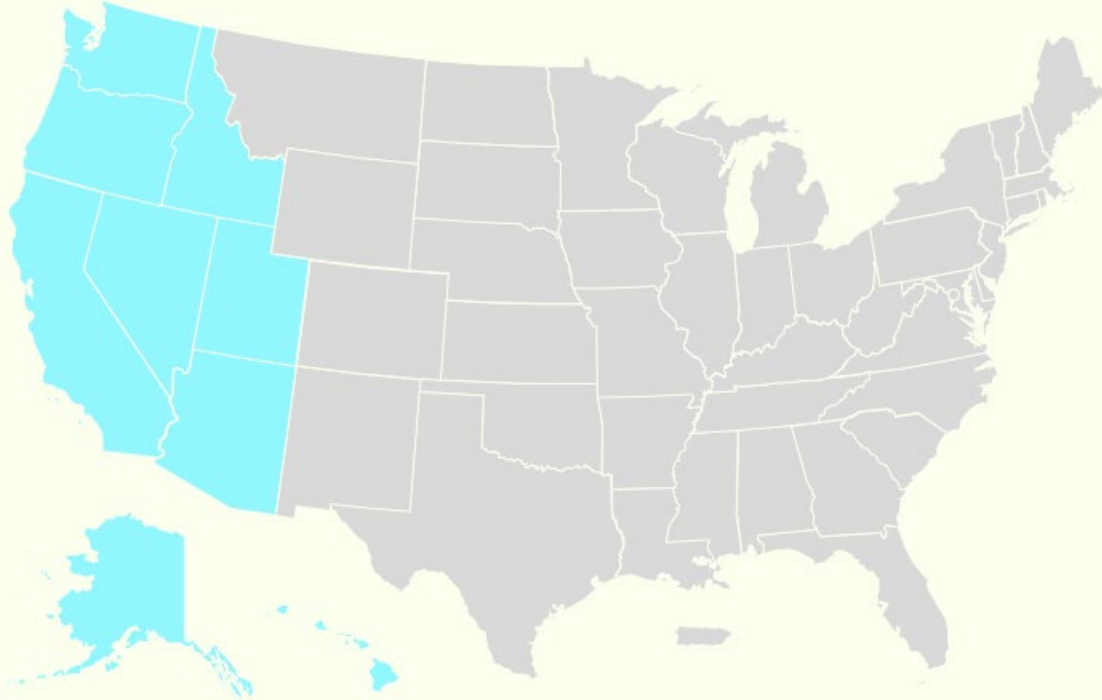
(Avg. maximum spending on int'l travel in upcoming year)



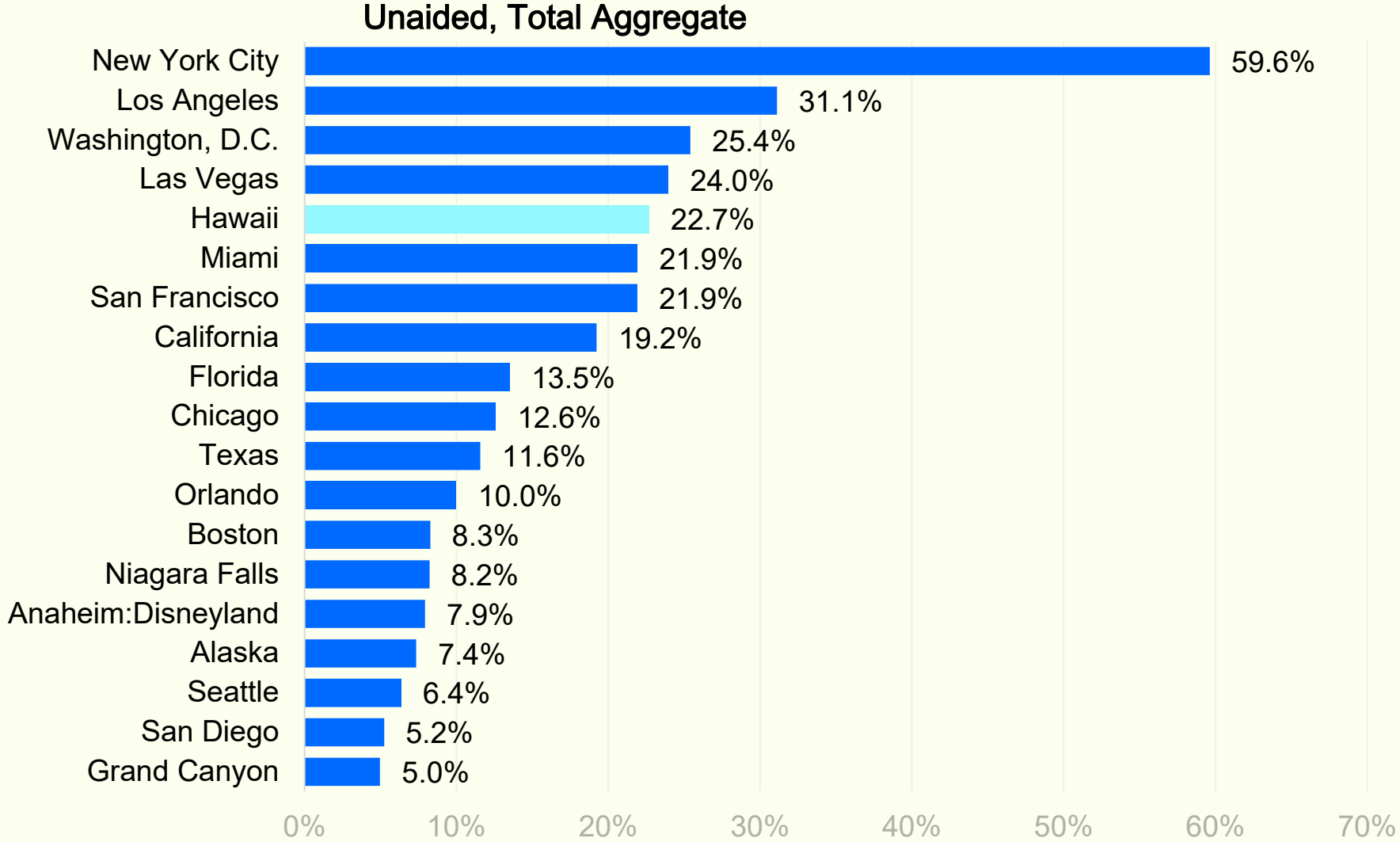
# The Western U.S. is of Most Interest to International Travelers in Japan, Germany, the Netherlands, Australia and France

By Market – % Interest in Visiting the Western U.S.

## Western U.S.



# NYC, LA, DC, Las Vegas and Hawaii are the Top 5 Most Desired U.S. Destinations Globally

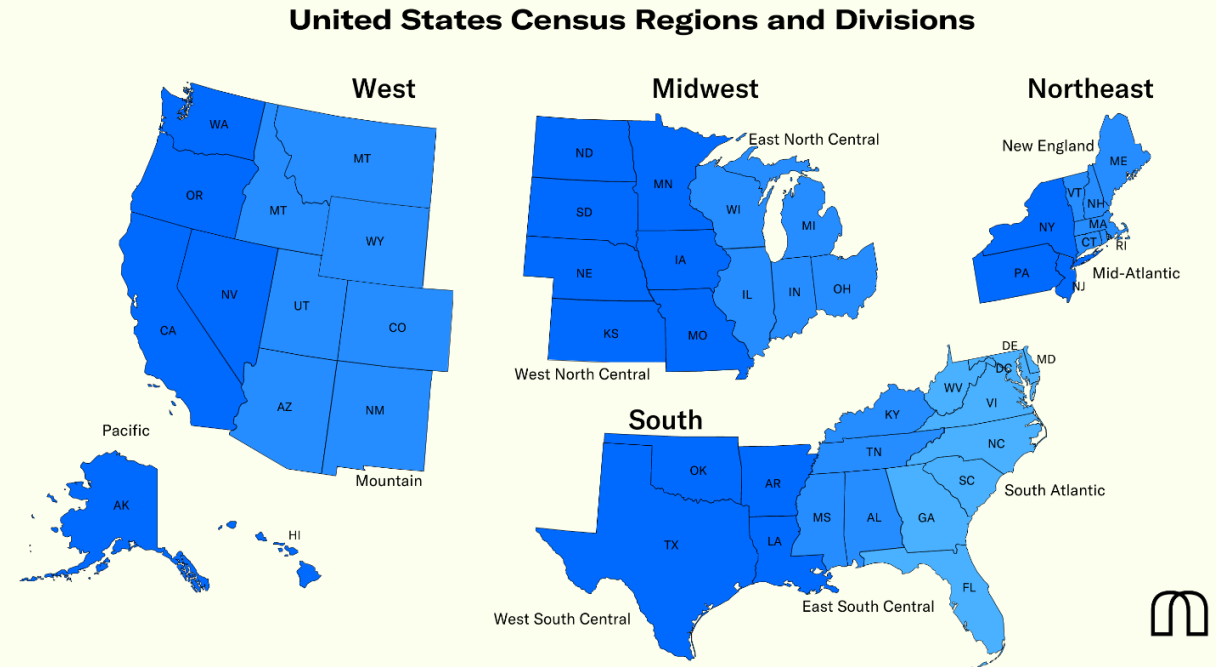




# American Travel Sentiment

# The State of the American Traveler

- Monthly tracking survey
- Representative sample of adult American travelers in each of four U.S. regions
- Tracks traveler sentiment to generate insights into domestic travel trends
- Survey collected: [August 16-27](#)
- 4,000+ fully completed surveys collected each wave
- Confidence interval of +/- 1.55%
- Data is weighted to reflect the actual population of each region



# Financial Sentiment

**Future Partners**



# The top barriers to travel reported by American travelers continue to be money - related.

## Question:

In the PAST SIX (6) MONTHS, which (if any) of the following have kept you from traveling more than you would have otherwise preferred?

(Select all that apply)





# Travel being “too expensive” had decreased slightly since the beginning of the year.

## Question:

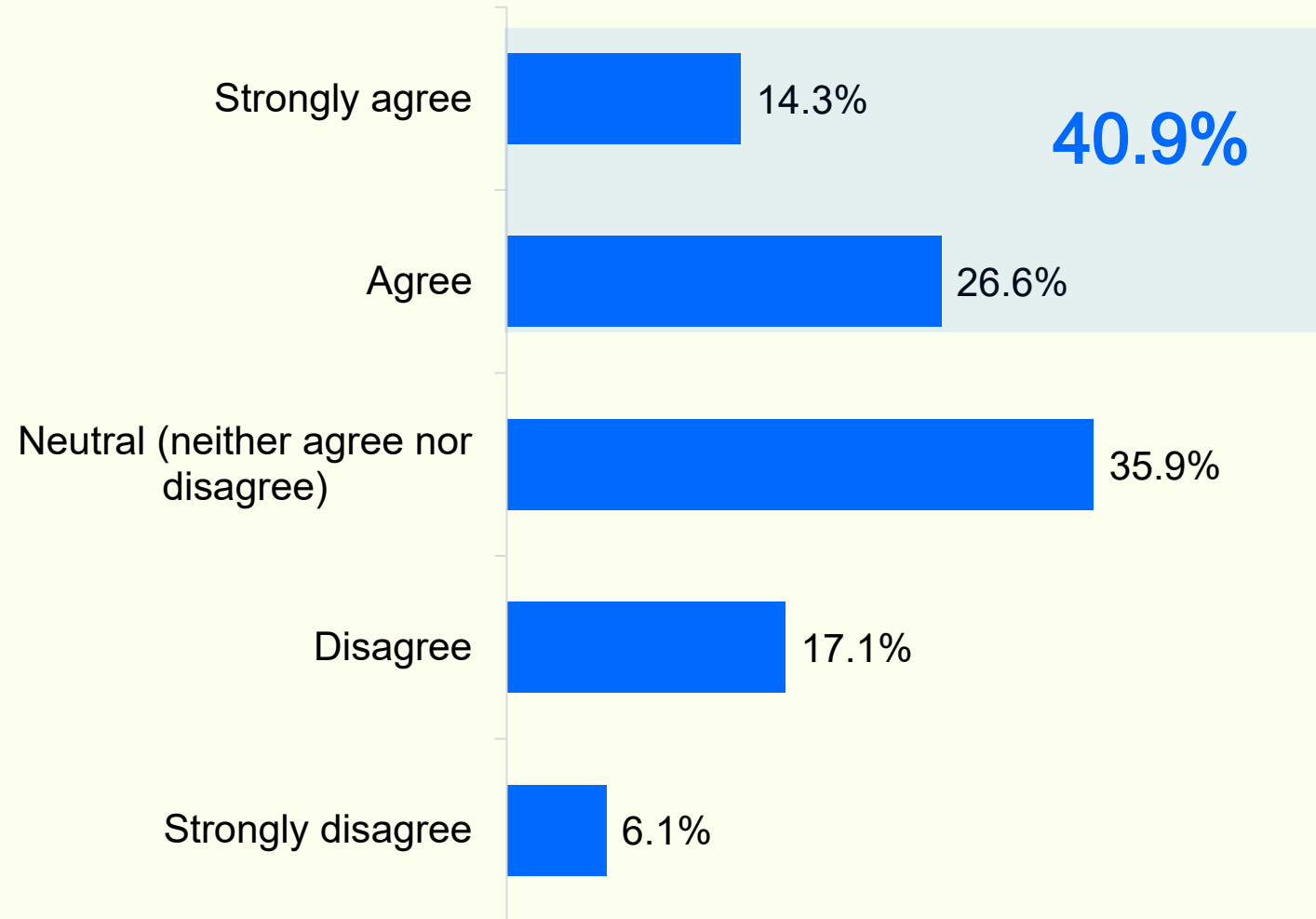
In the PAST SIX (6) MONTHS, which (if any) of the following have kept you from traveling more than you would have otherwise preferred? (Select all that apply)



# Recessionary concerns held steady last month.

## Question:

I expect the United States will enter an economic recession sometime in the NEXT SIX (6) MONTHS.

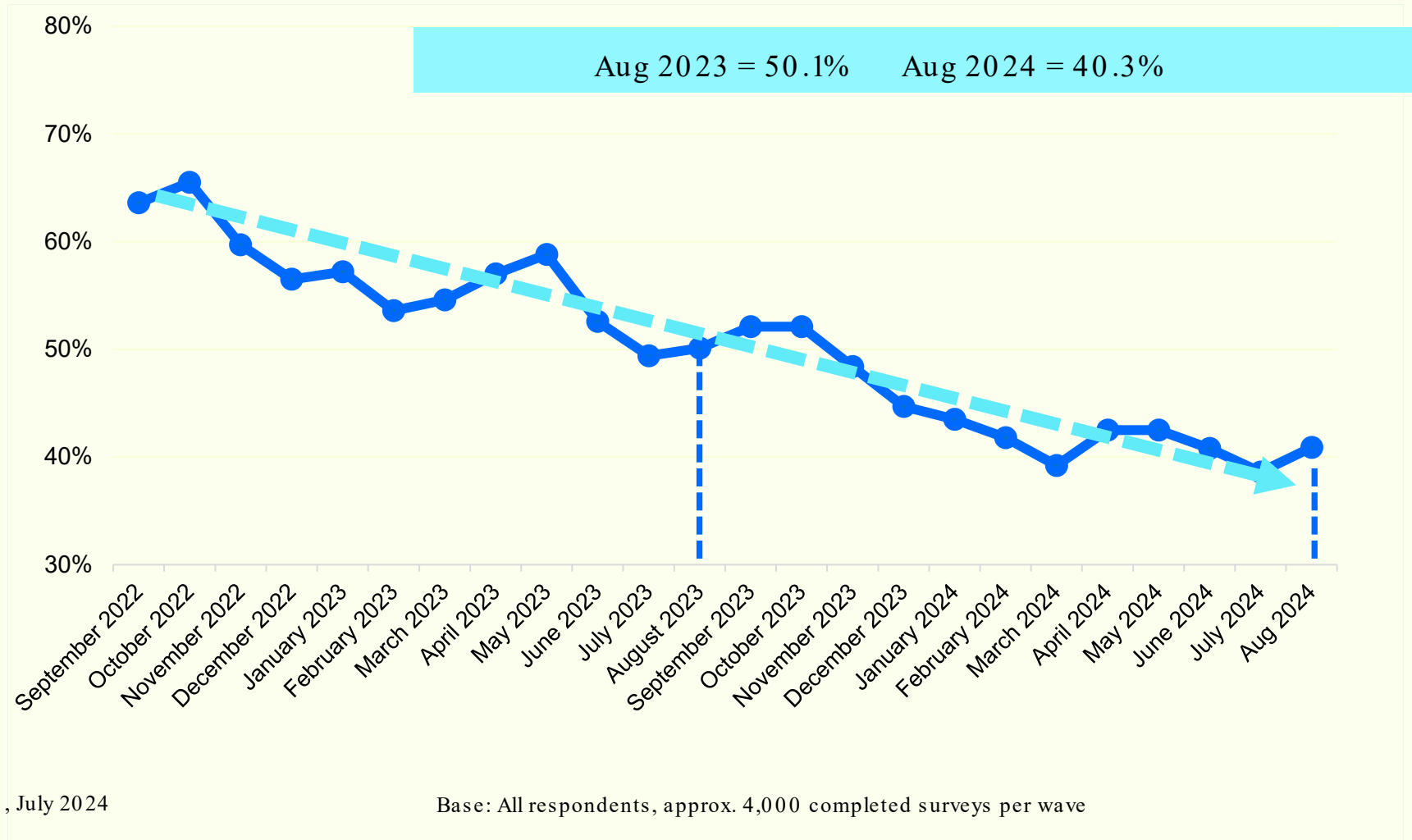


# ...but continue to slowly decline.

## Statement:

I expect the United States will enter an economic recession sometime in the NEXT SIX (6) MONTHS.

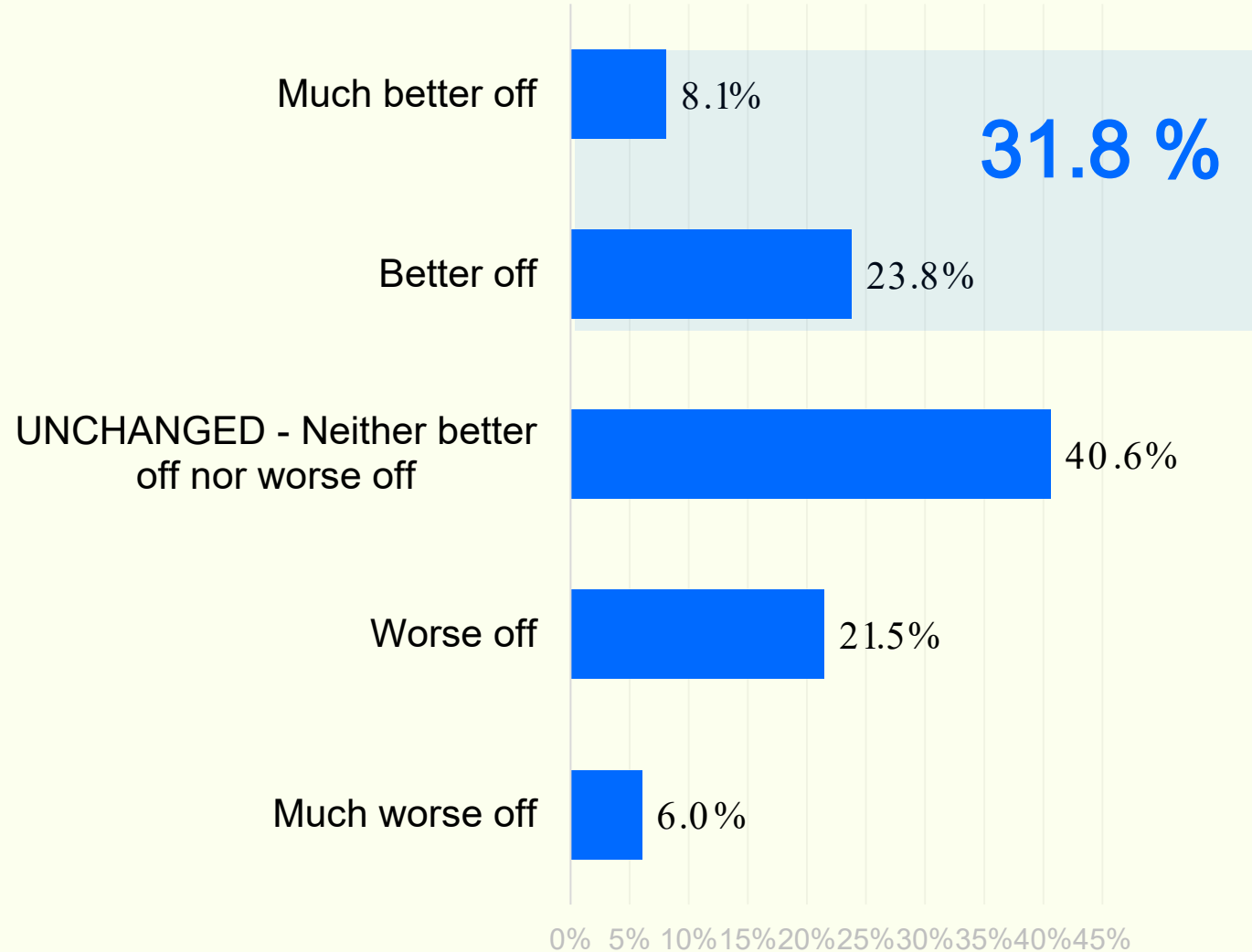
### % Agree or Strongly agree



# Travelers' feelings about their current finances weakened slightly this month.

## Question:

Would you say that you (and your household) are better off or worse off financially than you were a year ago?

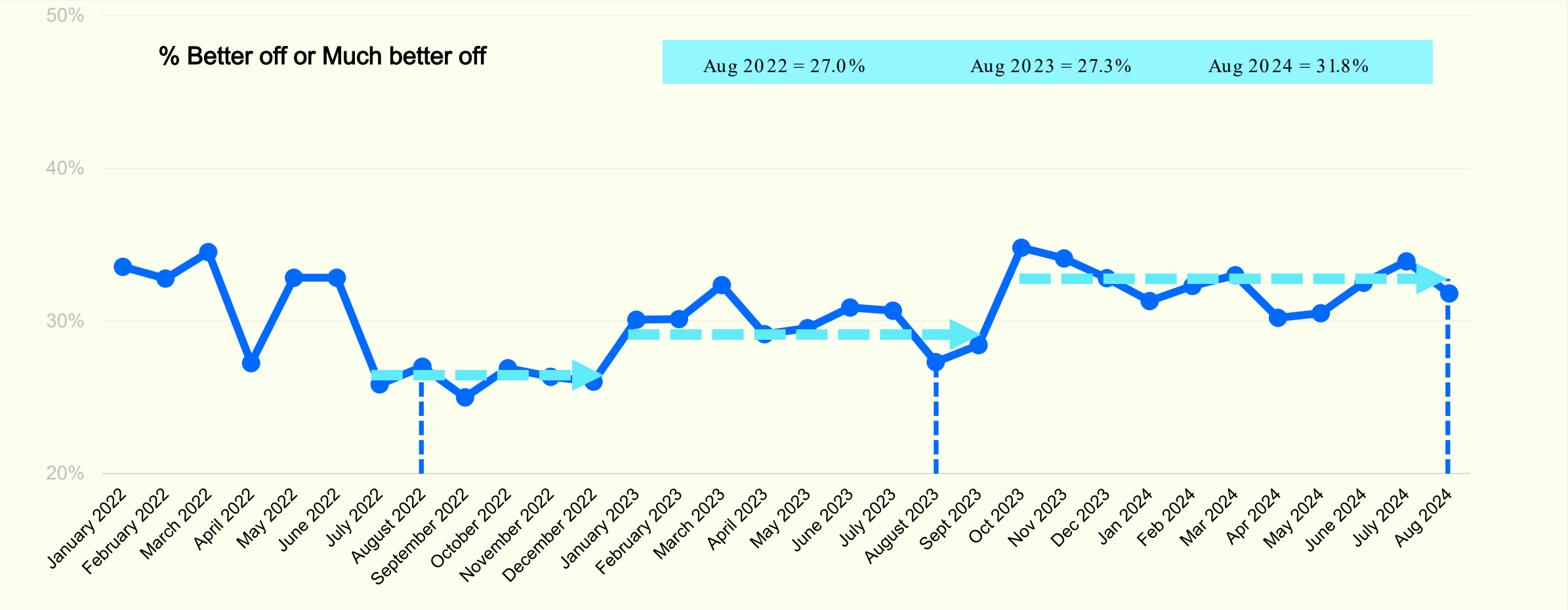




# Still, the proportion of travelers feeling “better off financially” is still improved from last year.

**Question:**

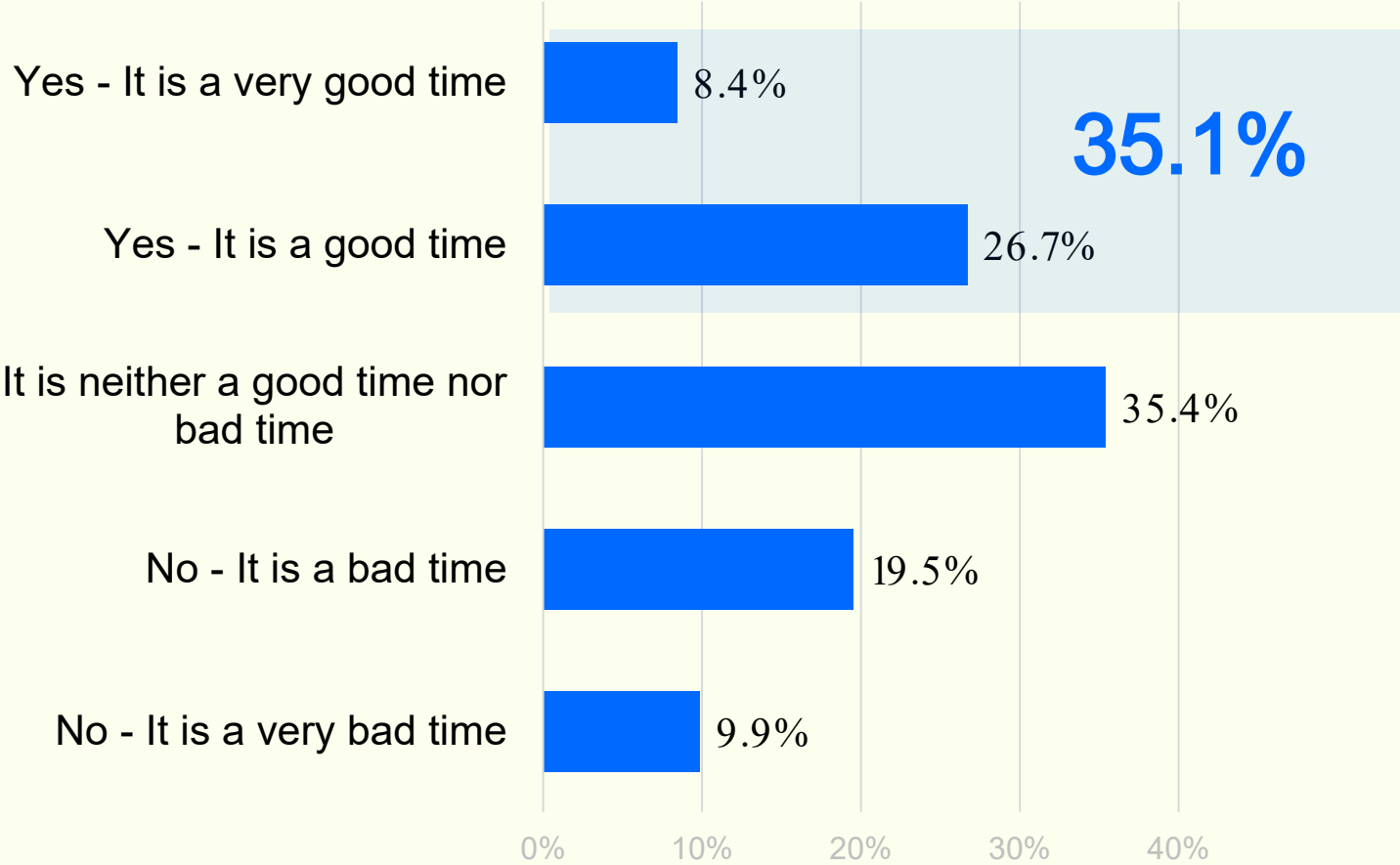
Would you say that you (and your household) are better off or worse off financially than you were a year ago?



# Travelers remain mostly split on if now is a good time to spend on leisure travel.

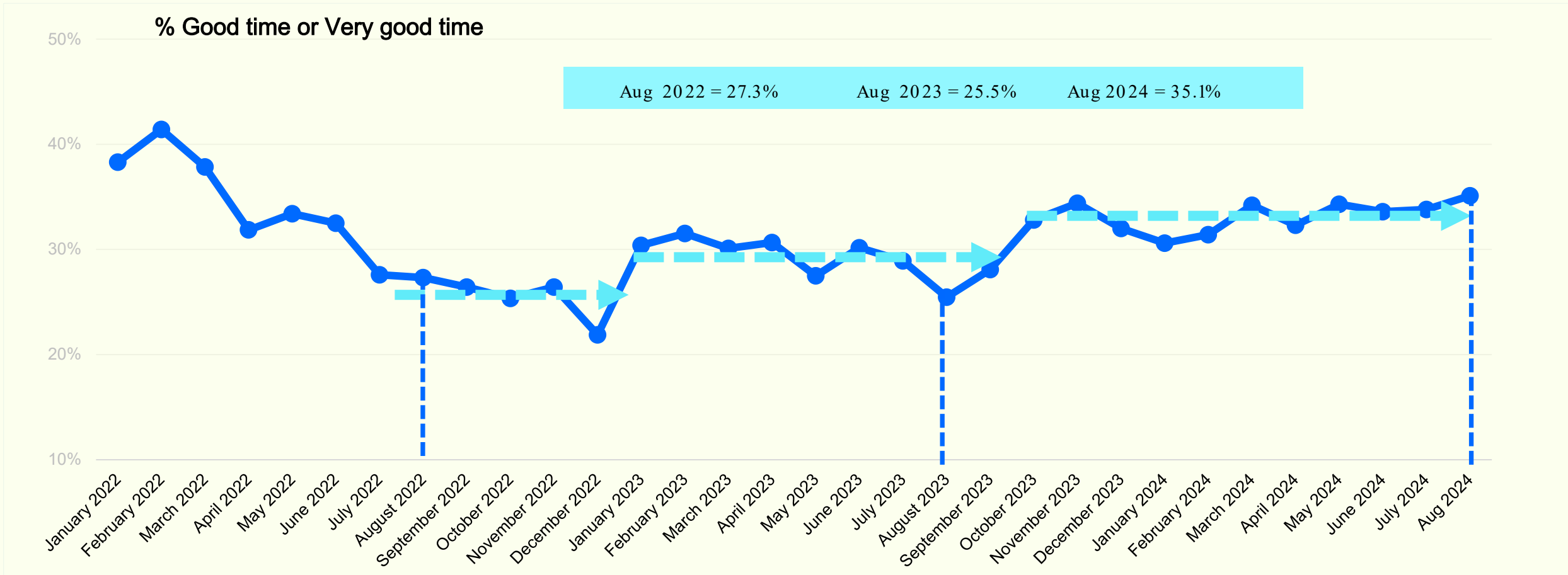
**Question:**

Thinking only of your household's finances, do you feel NOW is a good or bad time for you to spend money on leisure travel?



# The belief that now is a “good time to spend on leisure travel” is increasing slowly.

**Question:**  
Thinking only of your household's finances, do you feel NOW is a good or bad time for you to spend money on leisure travel?

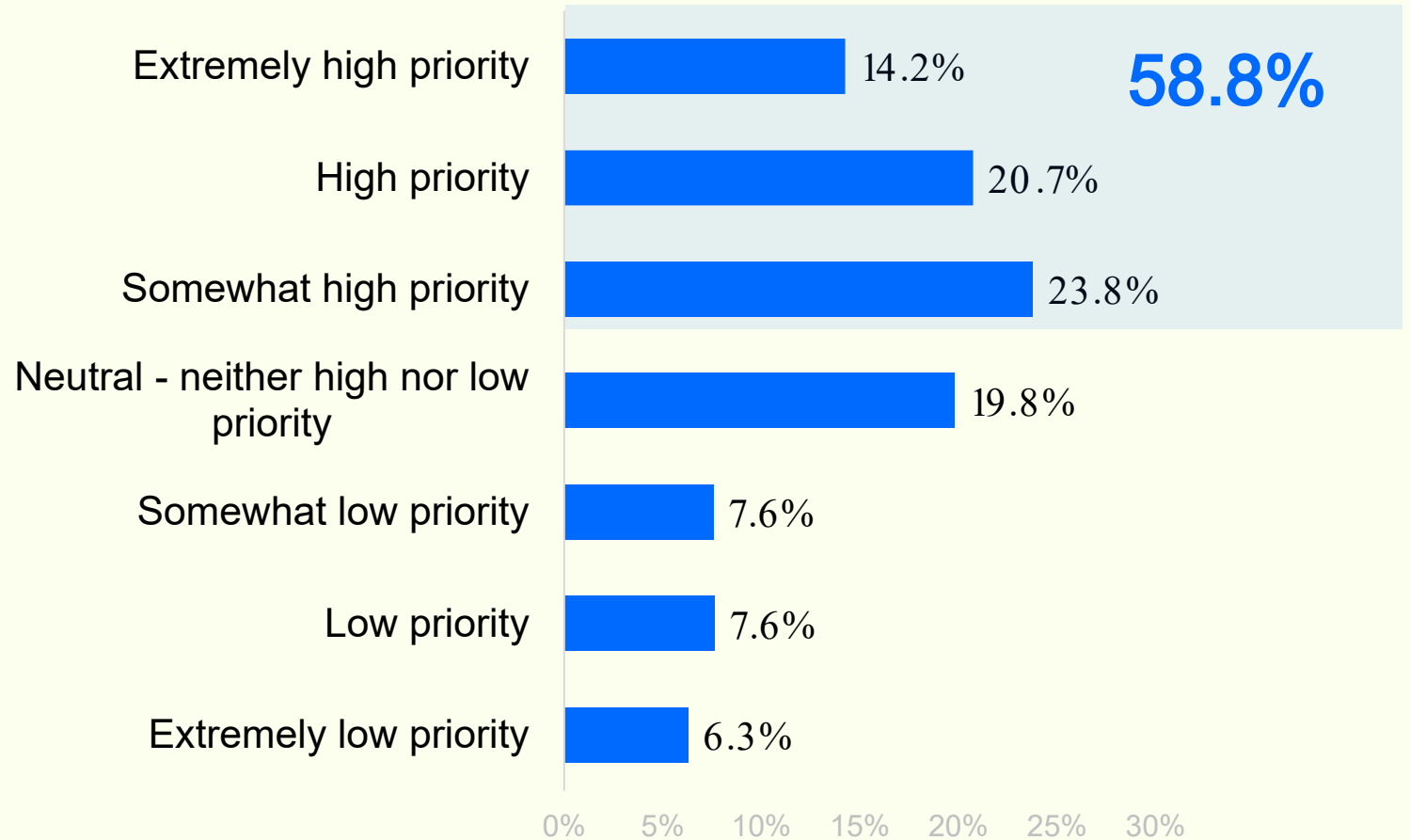


# Most intend to make leisure travel a spending priority in the next three months.

## Question:

Thinking carefully about how you expect to spend your income in the NEXT THREE MONTHS, please use the scale below to describe your spending priorities.

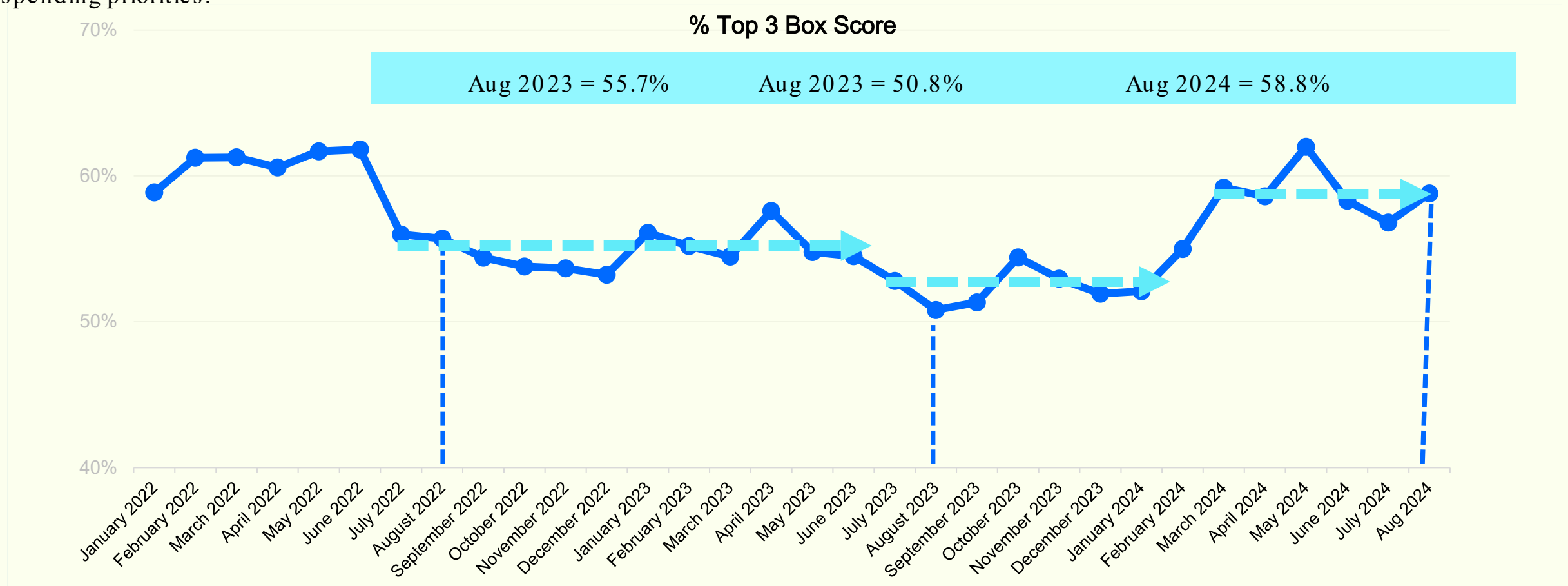
Leisure travel will be a(n) \_\_\_\_\_.



# ...the metric increased last month, and remains well above last year's level.

## Question:

Thinking carefully about how you expect to spend your income in the NEXT THREE MONTHS, please use the scale below to describe your spending priorities.



# Looking Forward

**Future Partners**

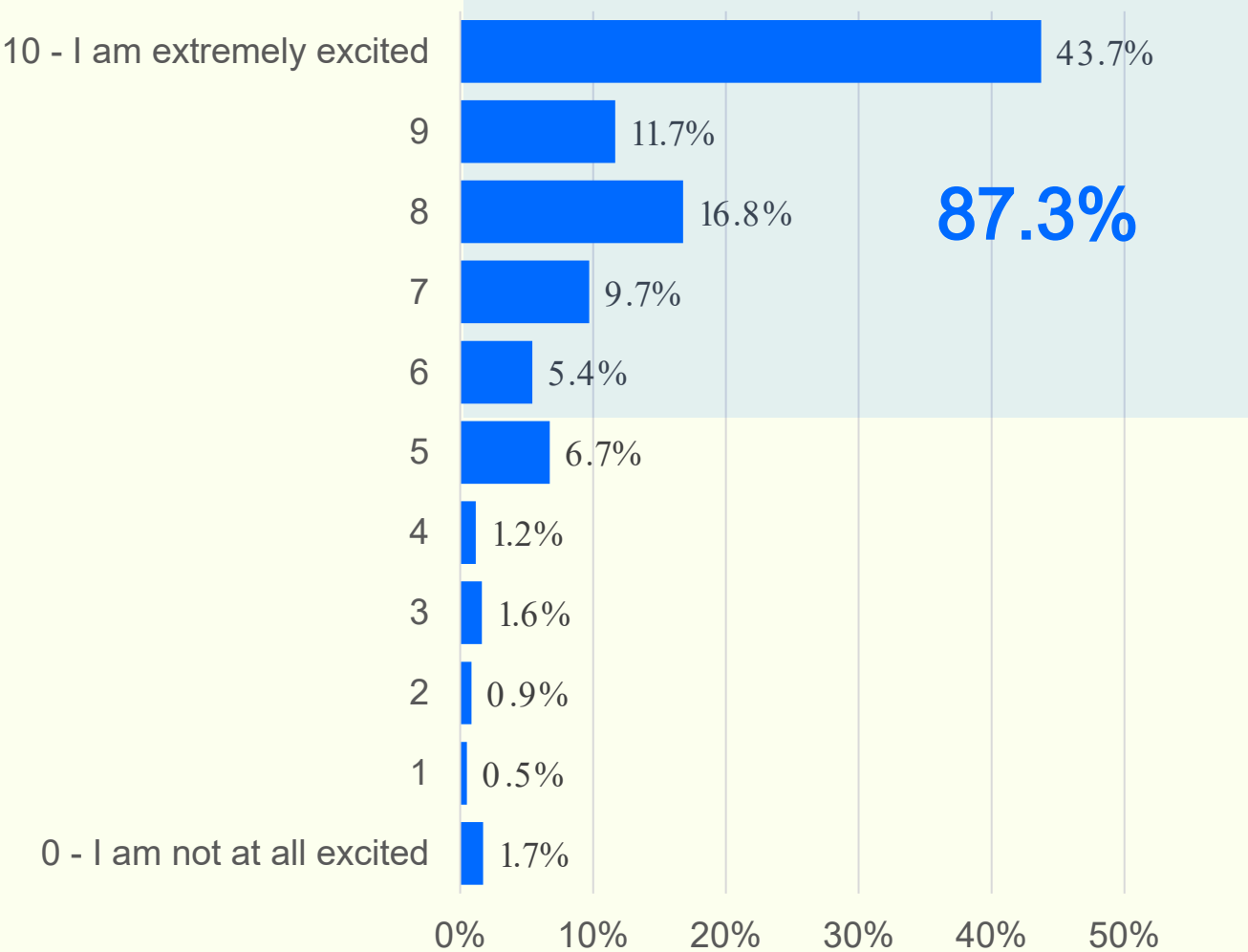




# Energized: Excitement for travel remains high.

**Question:**

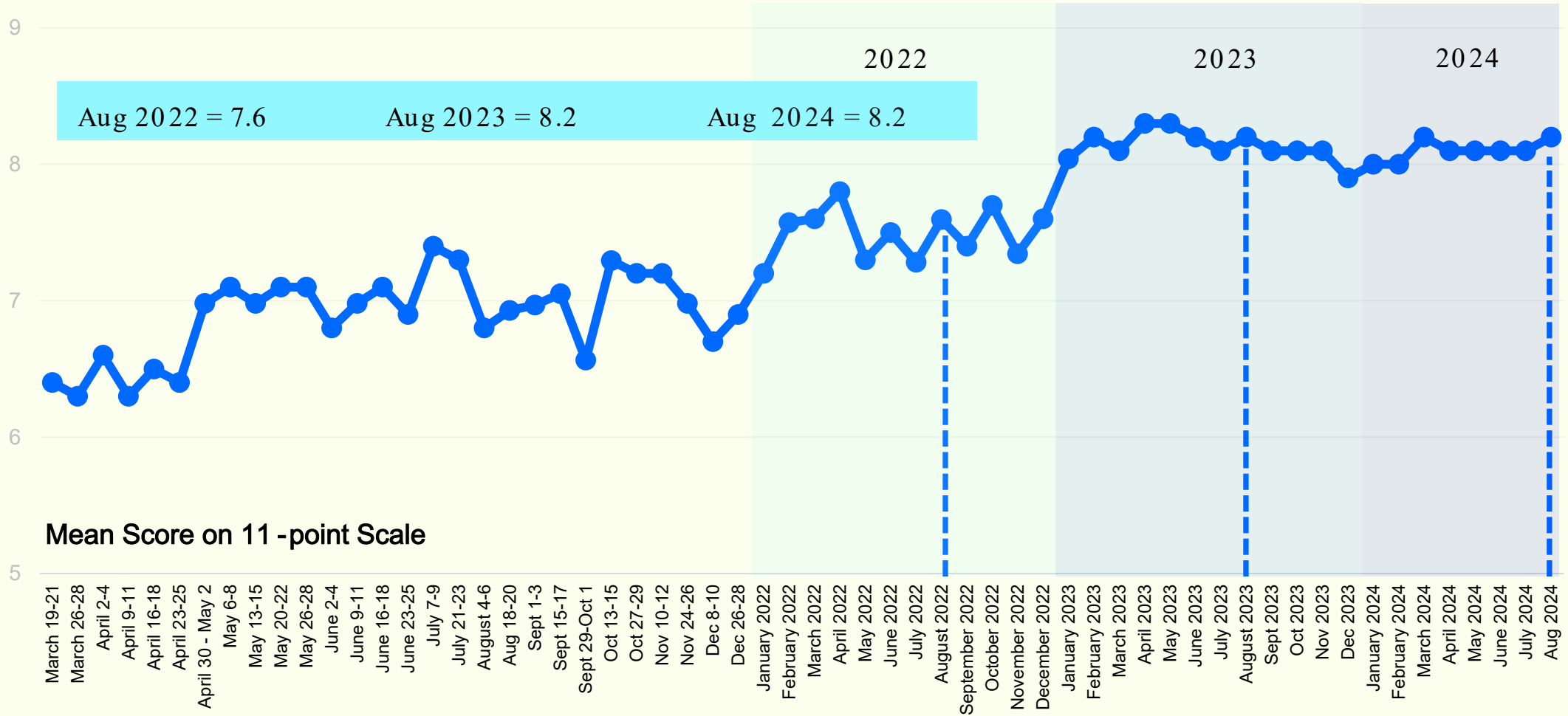
Which best describes how excited you are about LEISURE TRAVEL in the NEXT TWELVE (12) MONTHS? (Please answer using the 11-point scale below)



# Excitement to travel remains at near record levels.

## Question:

Which best describes how excited you are about LEISURE TRAVEL in the NEXT TWELVE (12) MONTHS?



# Reaching Travelers



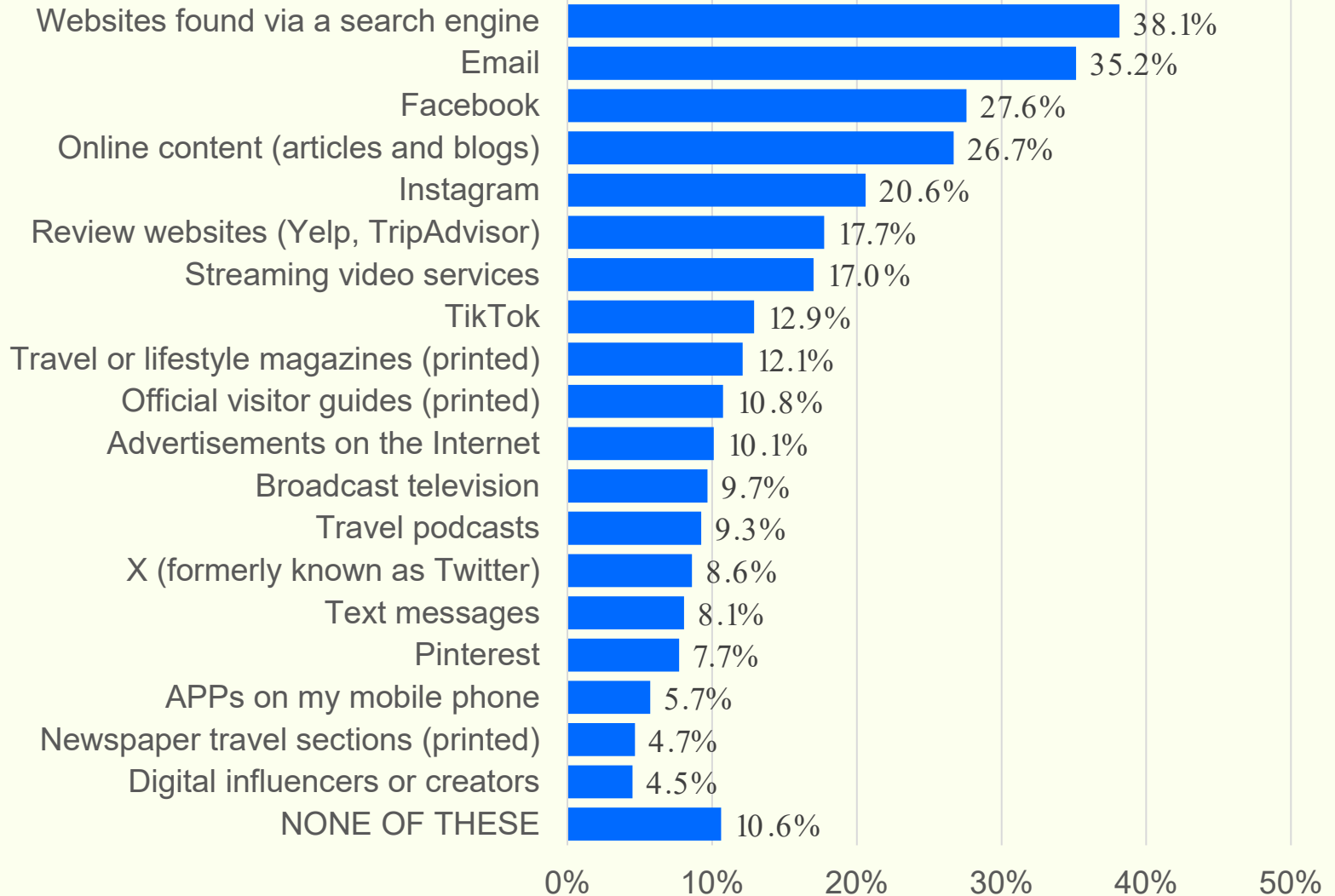
**Future Partners**



# Search engines, Email and Facebook are seen as the most effective places to reach travelers.

## Question:

Please think about how travel destinations could best reach you with their messages right now. Where would you generally be MOST RECEPTIVE to learning about new destinations to visit? (Please select all that apply)

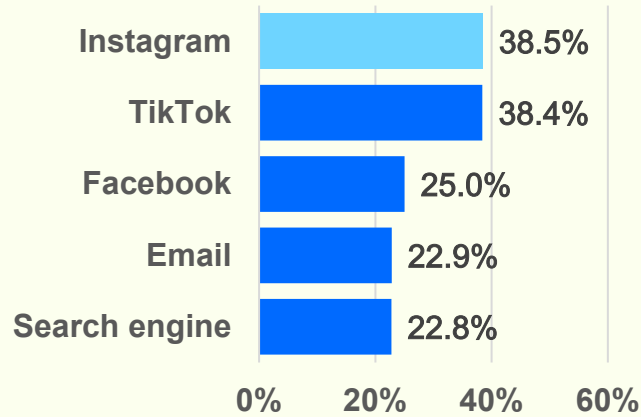


# Email, search engines and Facebook are seen as the most effective places to reach travelers.

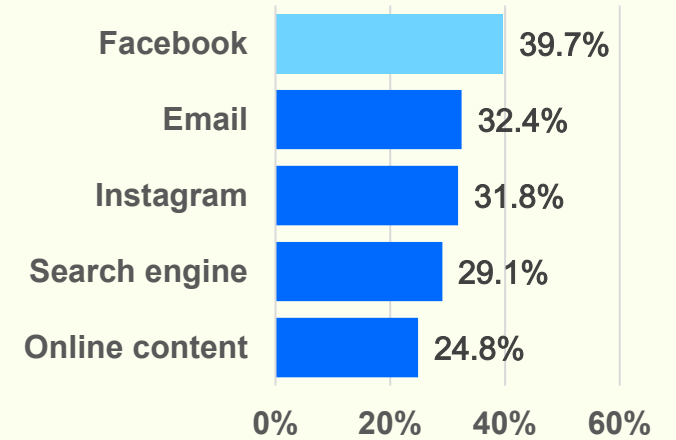
## Question:

Please think about how travel destinations could best reach you with their messages right now. Where would you generally be MOST RECEPTIVE to learning about new destinations to visit? (Please select all that apply)

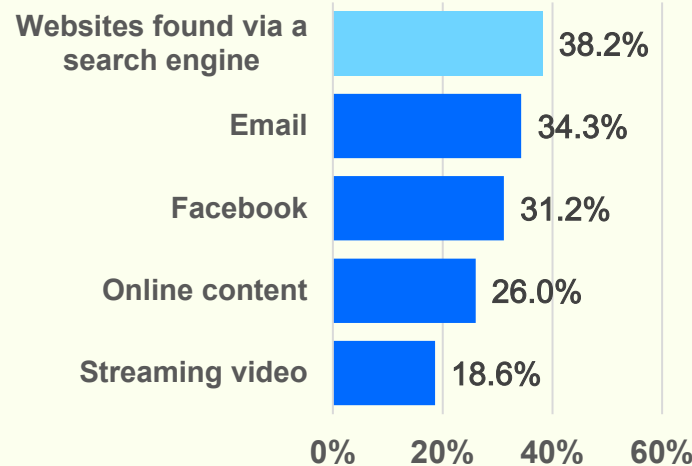
### Generation Z



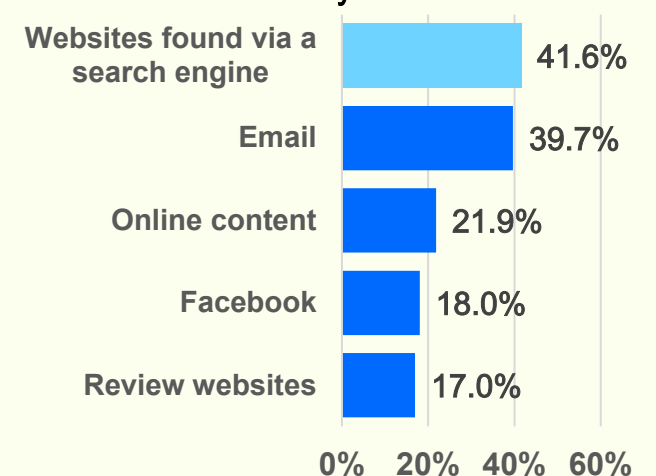
### Millennials



### Generation X



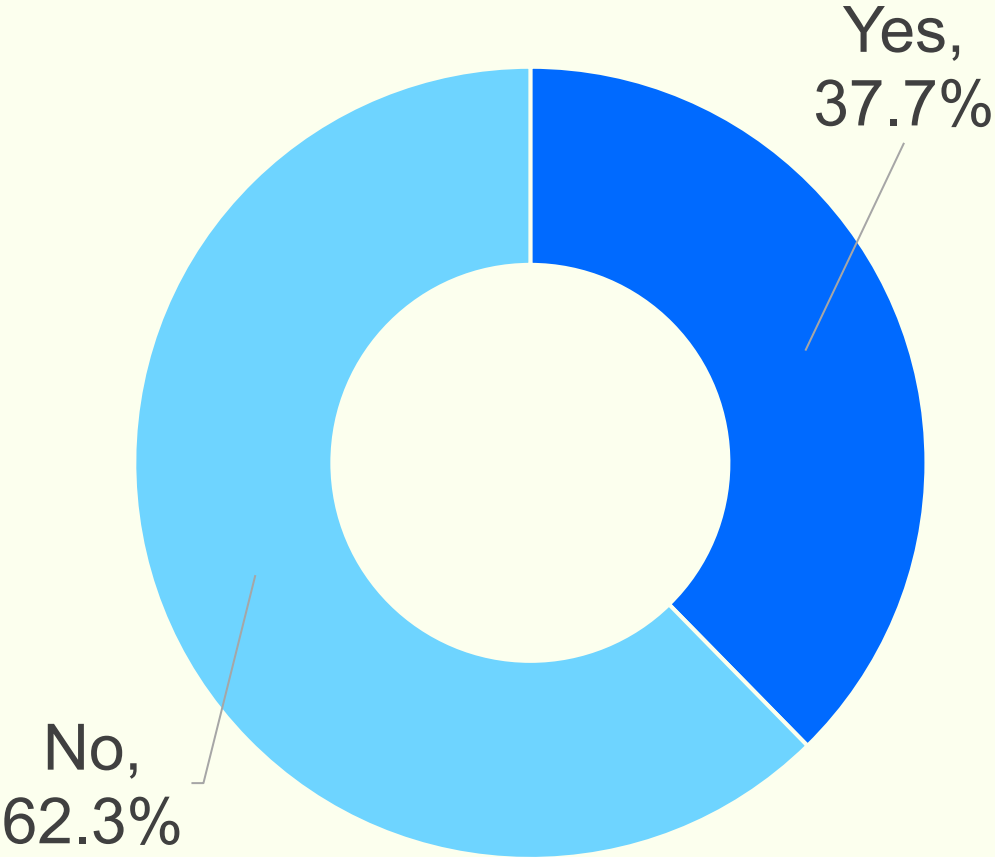
### Baby Boomers +



# 4-in-10 travelers use offline resources to plan their travels

**Question:**

In the PAST 12 MONTHS, which of these resources have you used to help plan your travel? (Select all that apply) PLEASE ONLY CHECK IF USED FOR TRAVEL PLANNING, IDEAS OR INSPIRATION]

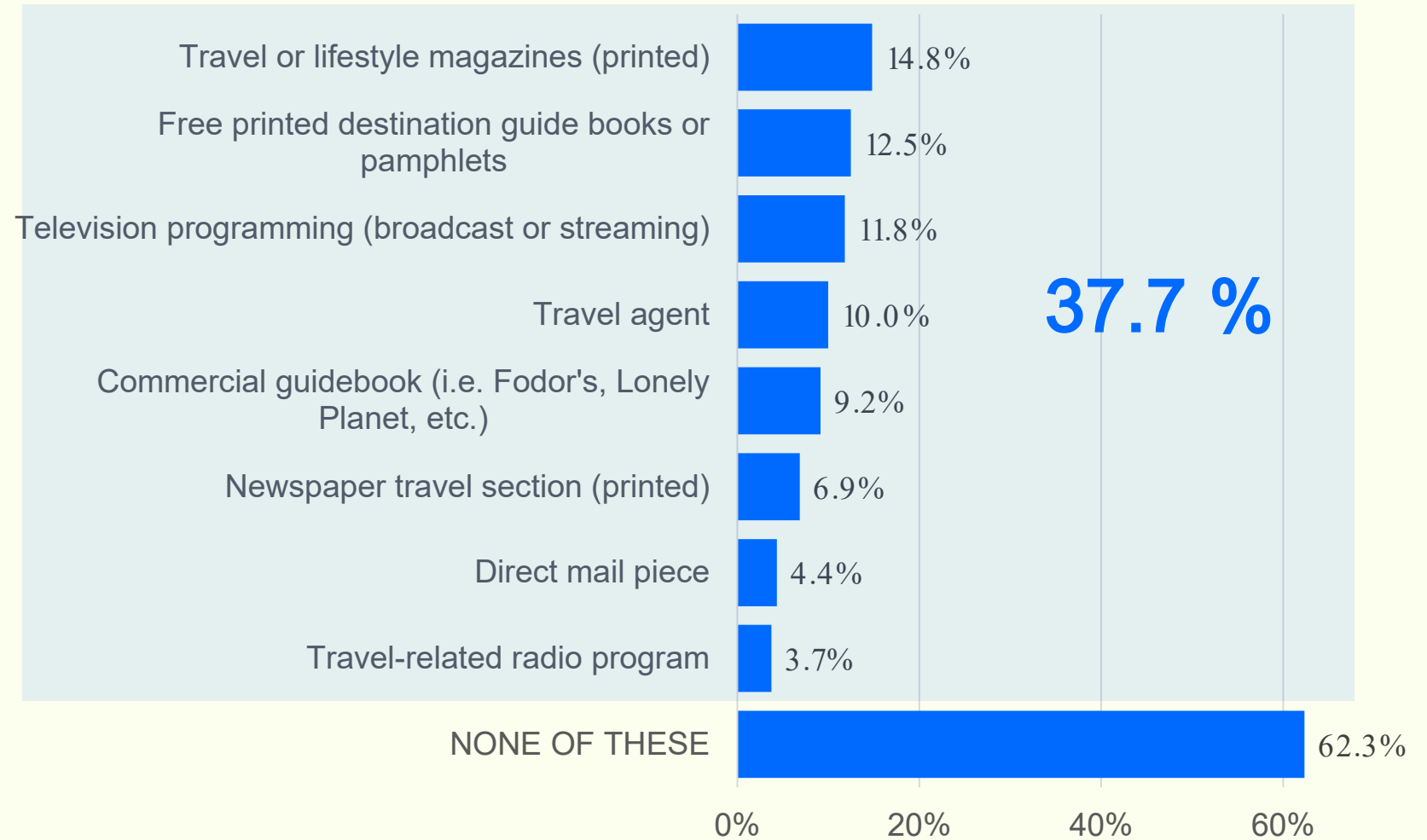


# Travel magazines are the leading offline source of planning information.

## Question:

In the PAST 12 MONTHS, which of these resources have you used to help plan your travel? (Select all that apply)

PLEASE ONLY CHECK IF USED FOR TRAVEL PLANNING, IDEAS OR INSPIRATION

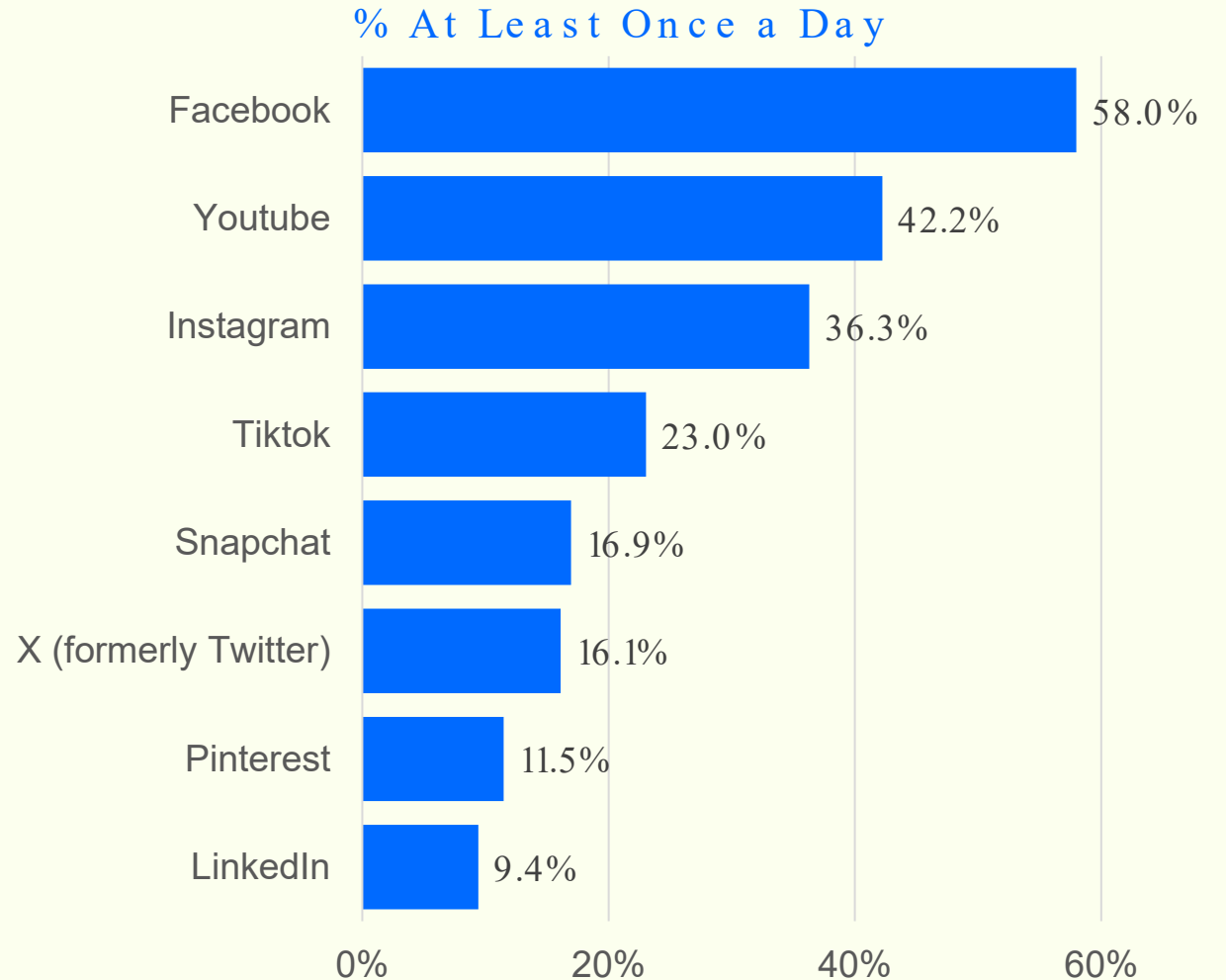




# Facebook, Youtube and Instagram are the most frequently used social channels

## Question:

Which best describes how often you use each of these social media platforms?

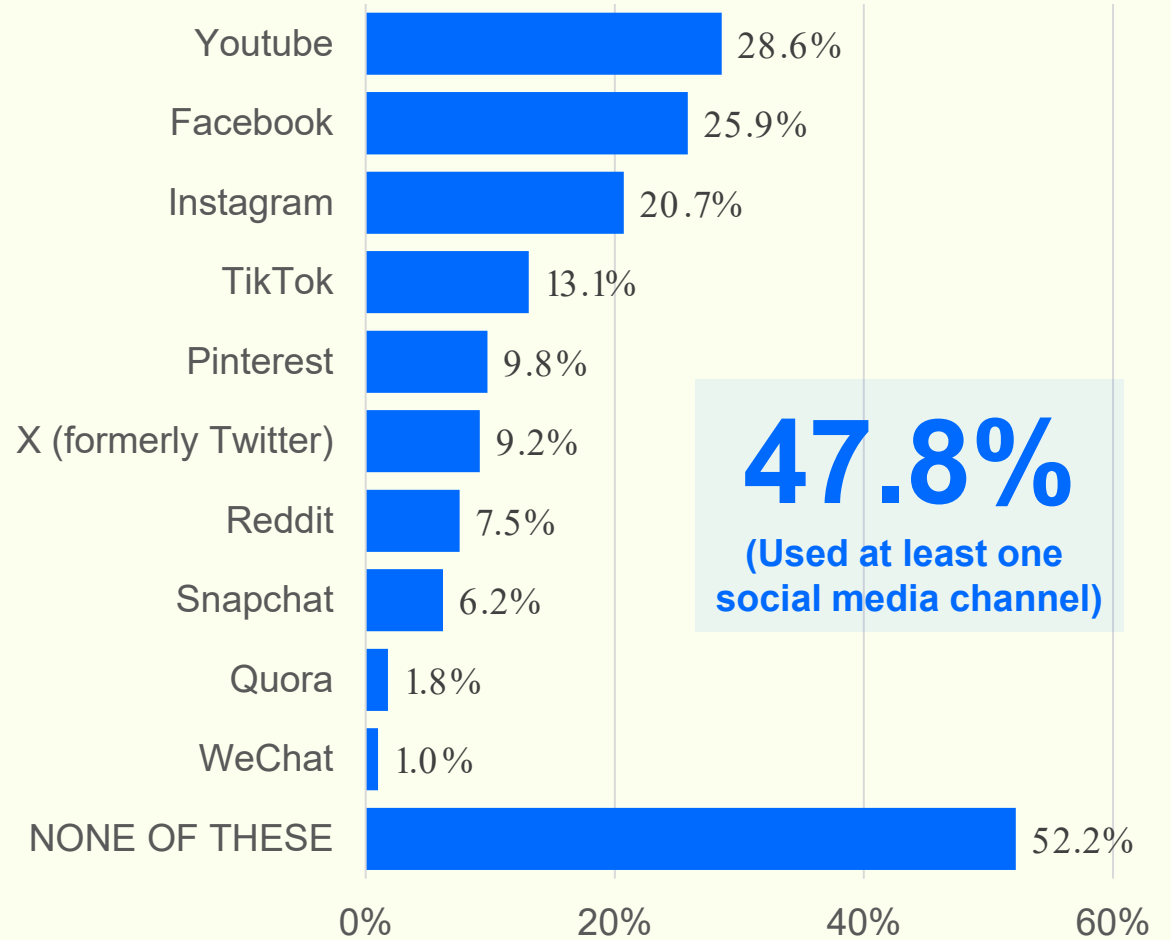


# Nearly half of travelers use social media resources for planning

## Question:

In the PAST 12 MONTHS, which of these resources have you used to help plan your travel? (Select all that apply)

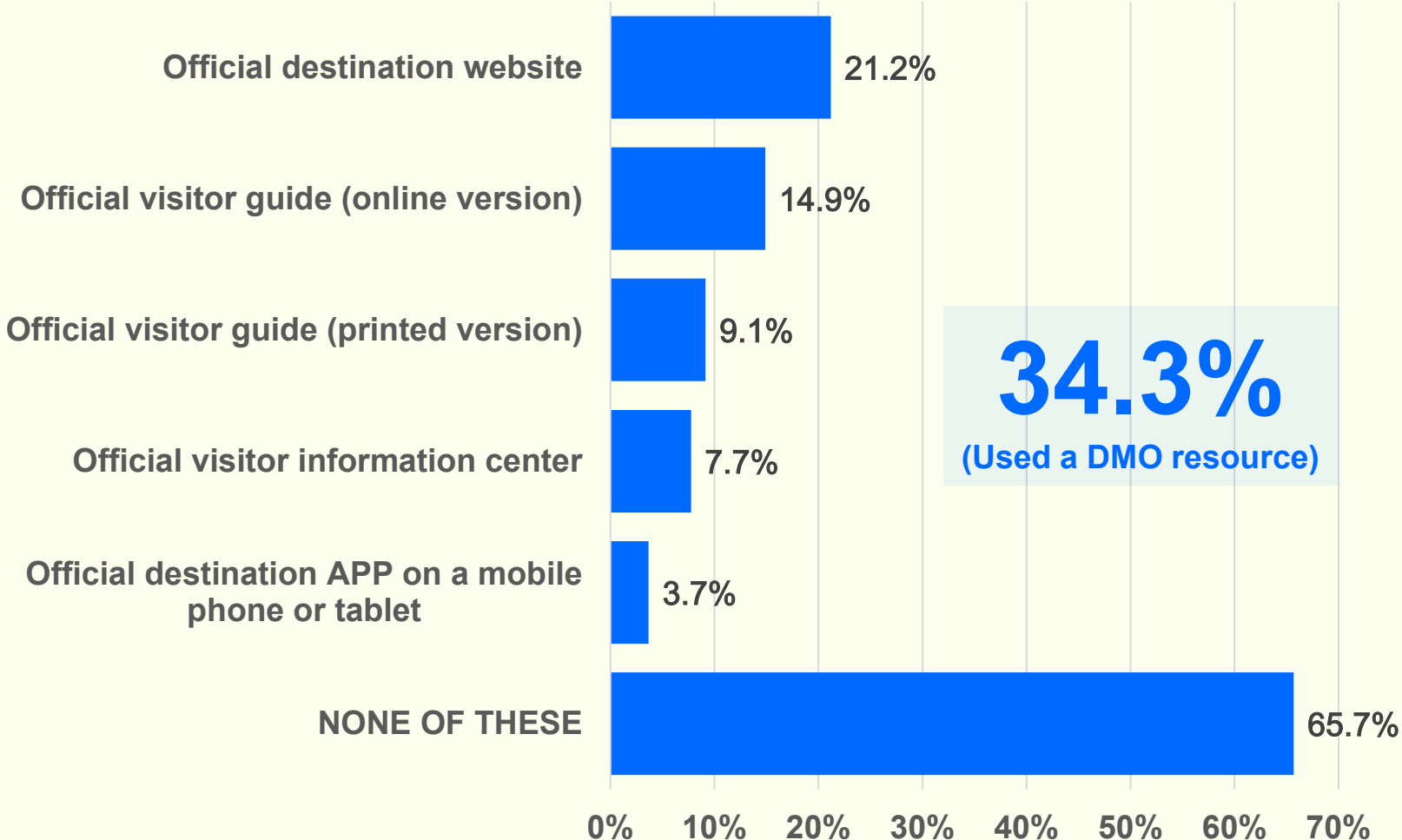
PLEASE ONLY CHECK IF USED FOR TRAVEL PLANNING, IDEAS OR INSPIRATION



# DMOs are used by about 1-in-3 travelers, with their websites leading the way.

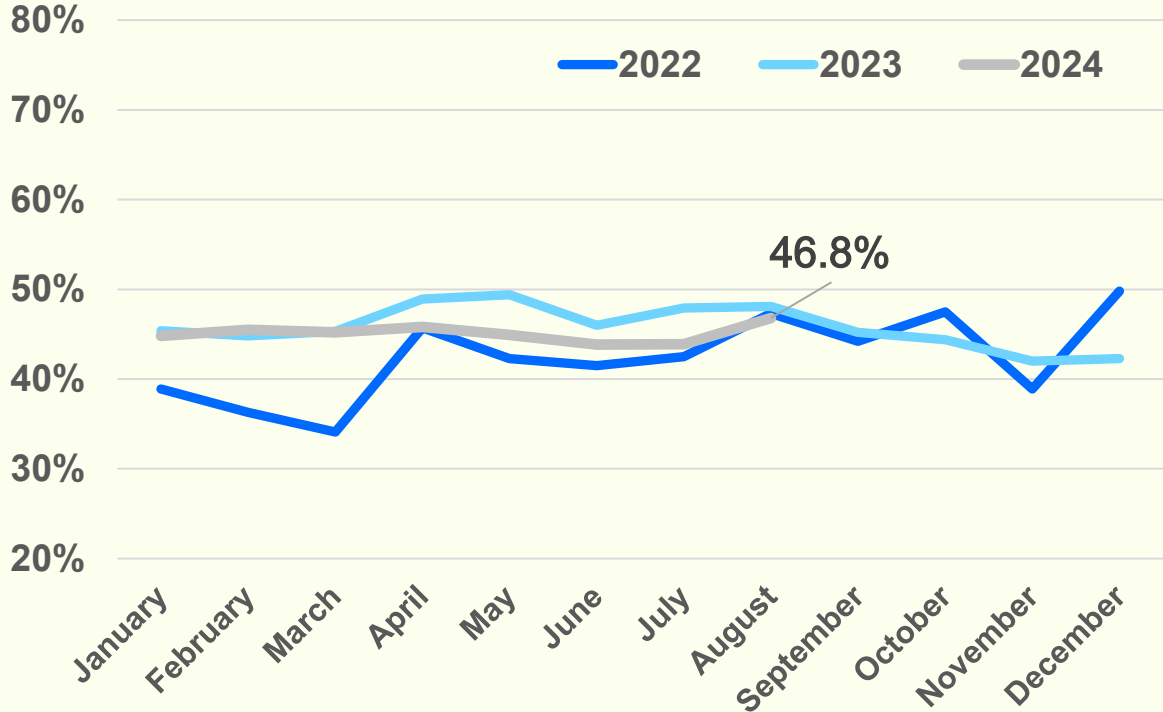
**Question:**

In the PAST TWELVE (12) MONTHS, have you used a destination's official local Visitors or Convention Bureau (or Chamber of Commerce), or state or national government tourism office to help plan any travel? If so, which resources did you use?



# Day -dreaming about travel is practically an American pastime

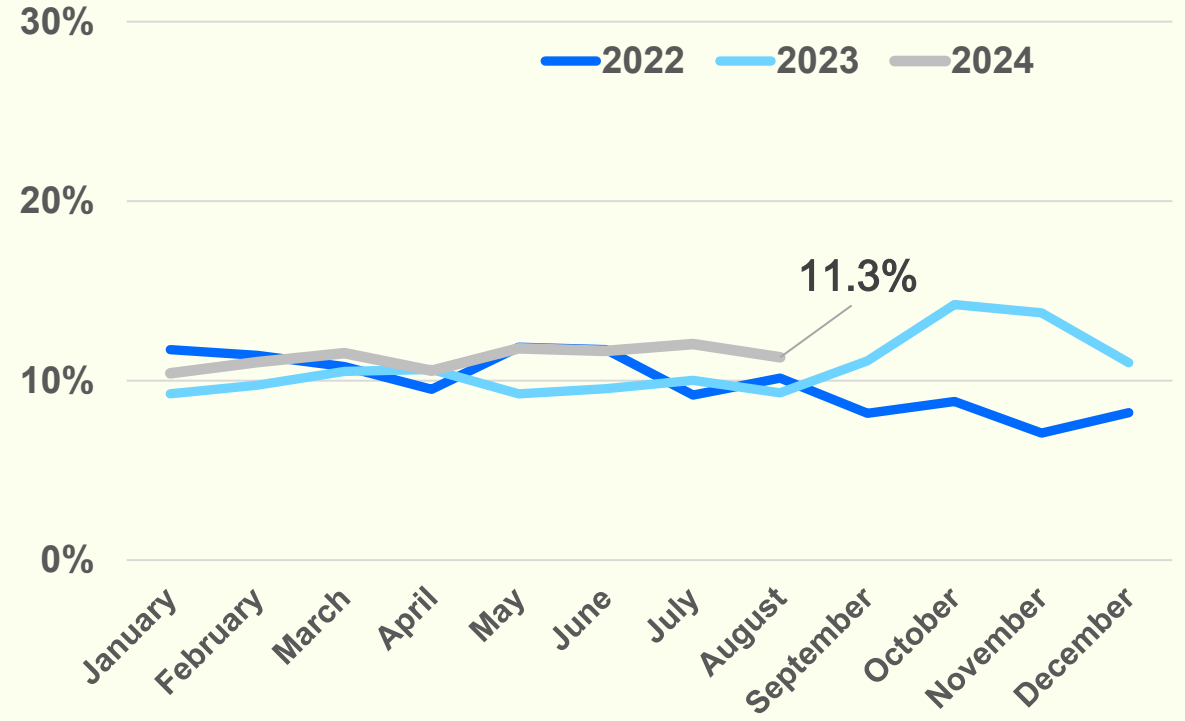
Day-dreamed about travel in the past week  
(% of all American Travelers)





# Over 1-in-10 researched travel ideas offline

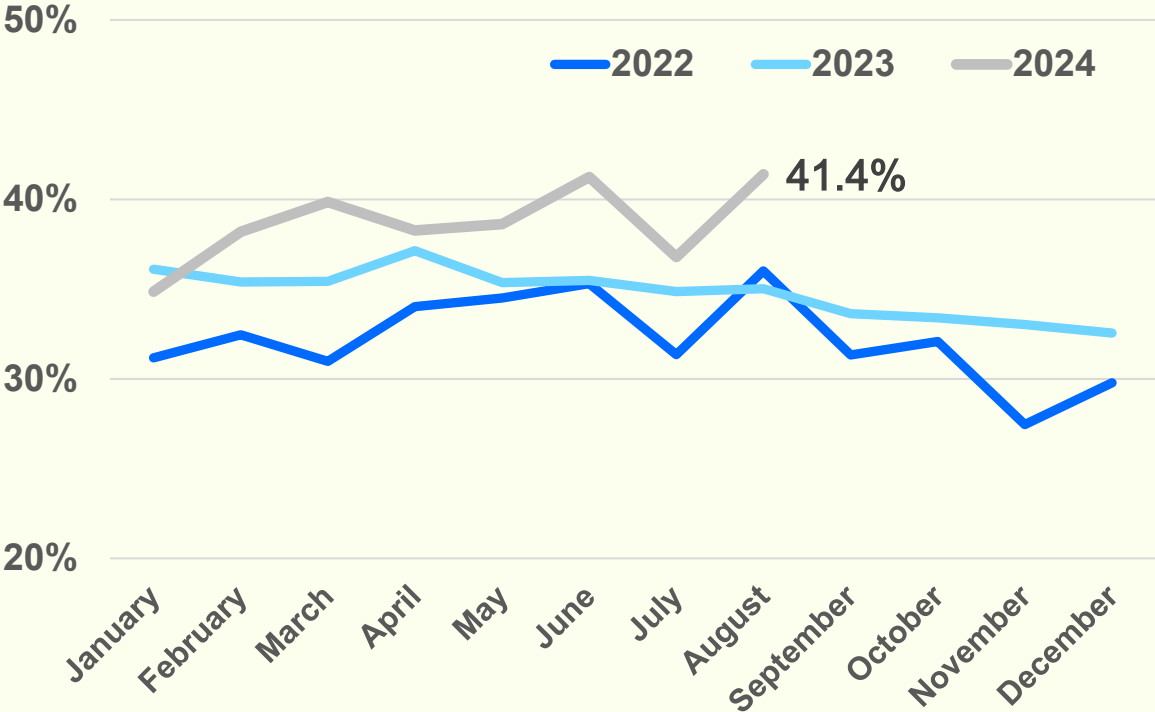
Researched offline in the past week  
(% of all American Travelers)





# More than 1 -in -3 researched travel ideas online

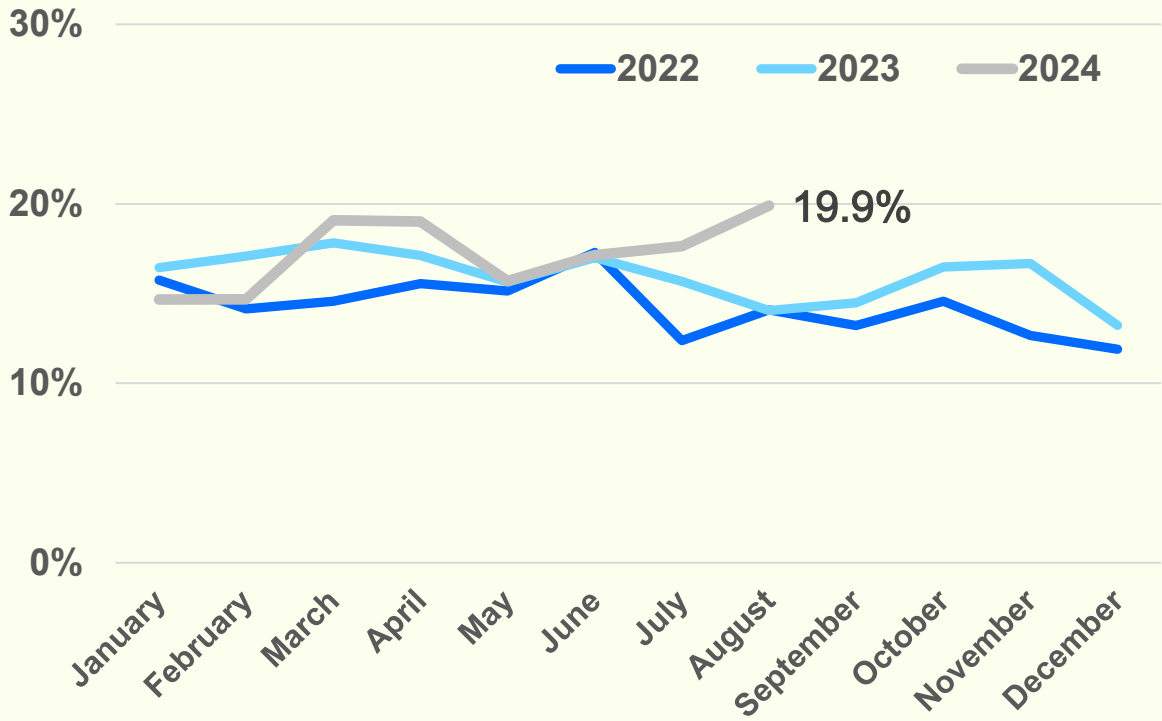
Researched about travel online in the past week  
(% of all American Travelers)





# Booking is up from this time last year

Made travel reservations in the past week  
(% of all American Travelers)





# Hawaii Specific KPIs

**Future Partners**

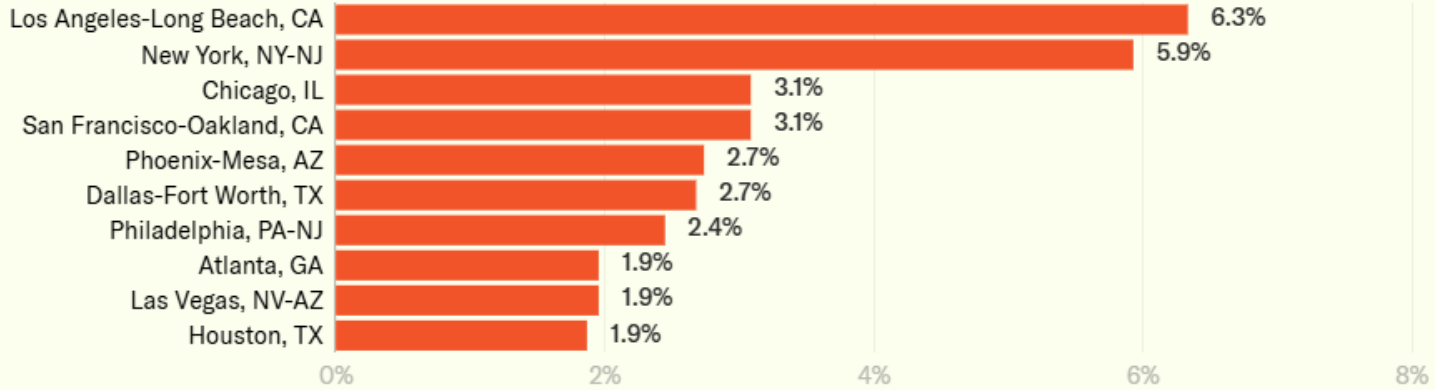




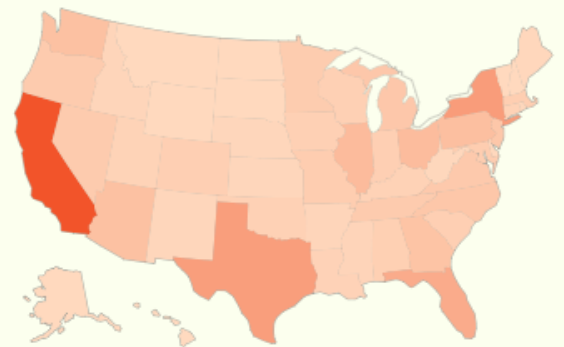
# Origin Markets

Out-of-State Likely Visitors to Hawaii (Next 12 Months)

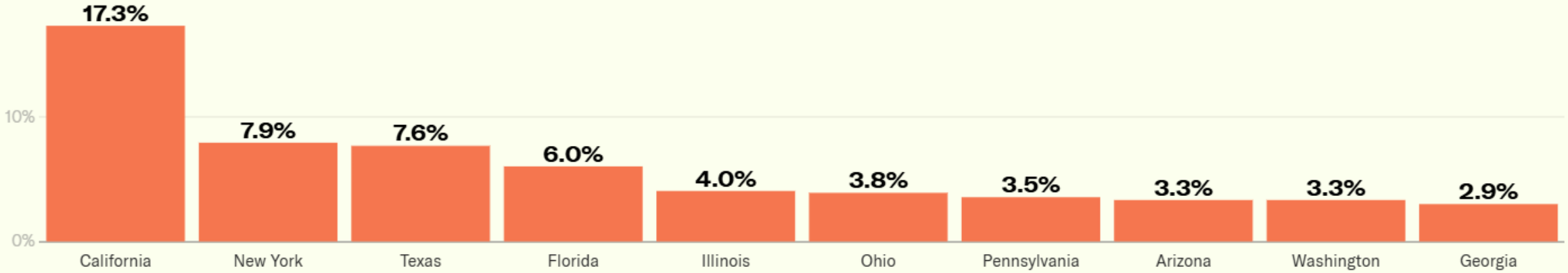
### Top Origin Metros



### Origin Map



### Top Origin States



# Travel Behaviors

## Out-of-State Recent Visitors to Hawaii (Past 12 Months)

### Traveler Segments

(Past 12 Months)



**Air Travelers** *Traveled by Commercial Airline*



84.3%



**Cruise Travelers** *Traveled by Commercial Cruise Line*



33.3%



**Sporting Event Travelers** *Traveled for a Sports Event*



38.2%



**Event & Festival Travelers** *Attended a Festival or Special Event*



59.6%



**Family Travelers** *Parent That Travels with School-Aged Children*

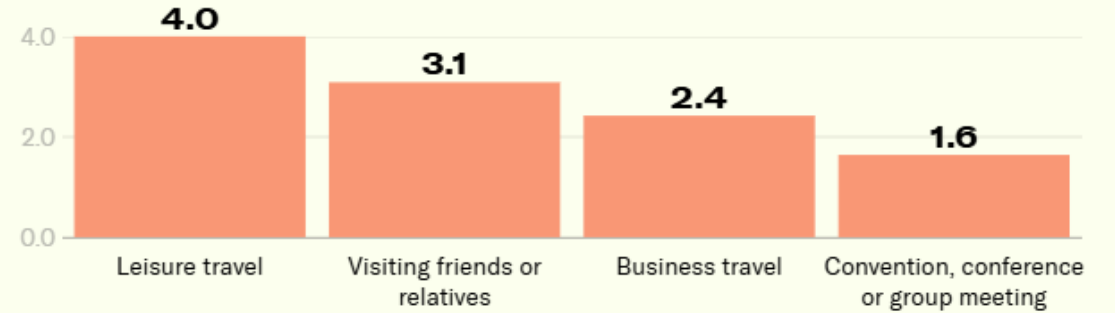
43.2%

### Two-Year Travel Snapshot

(Average per Trip Type)

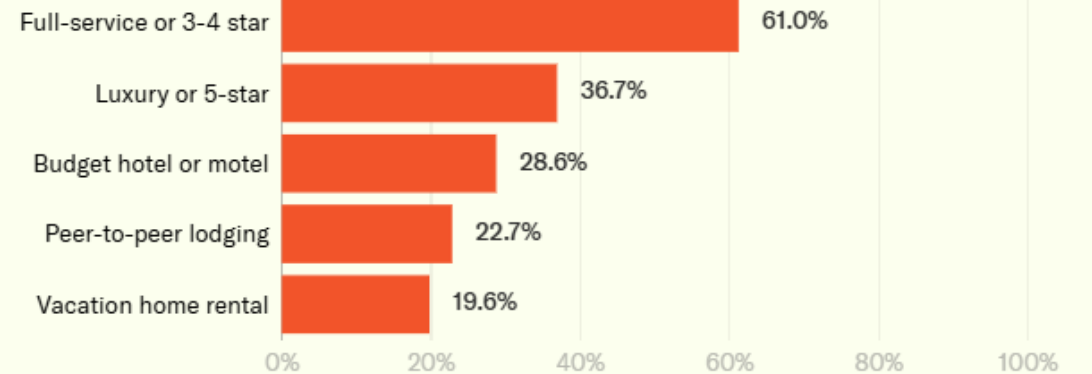
Total

11.1 trips



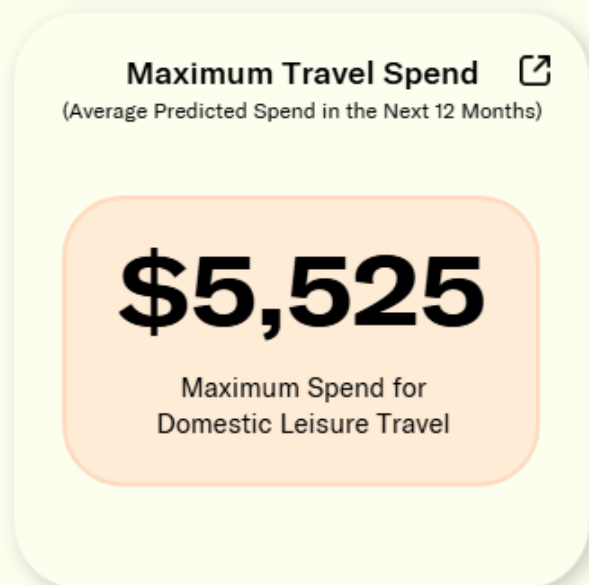
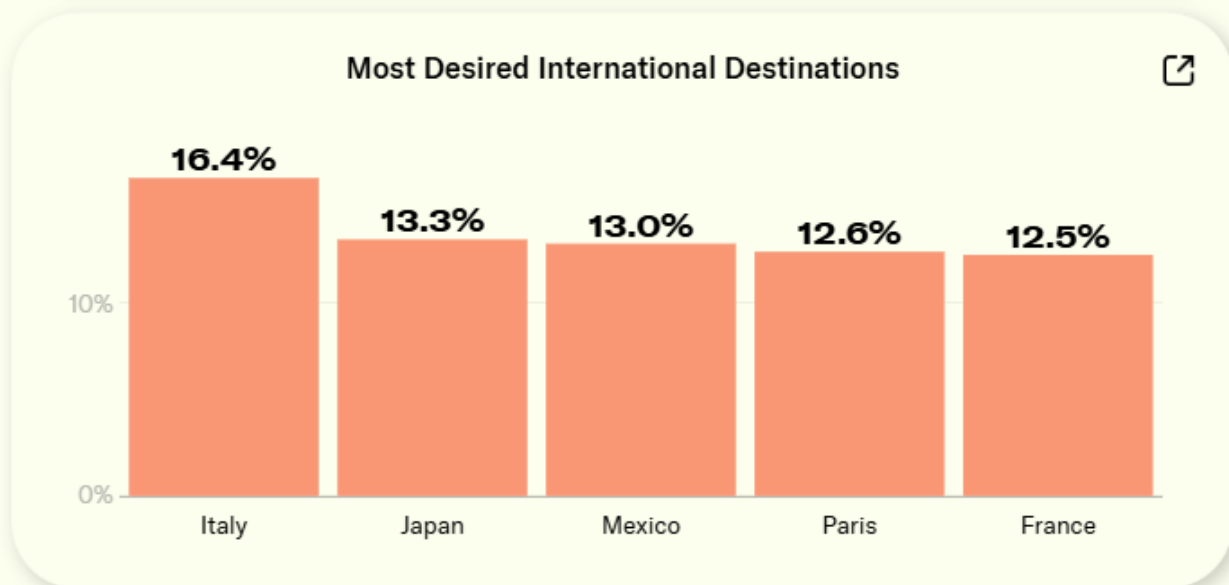
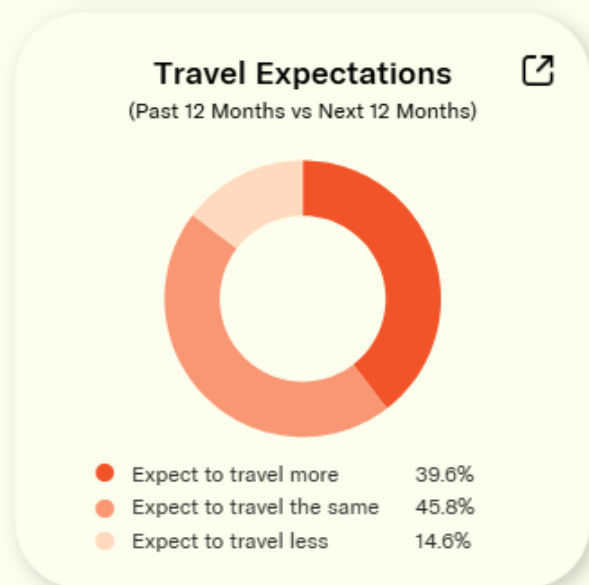
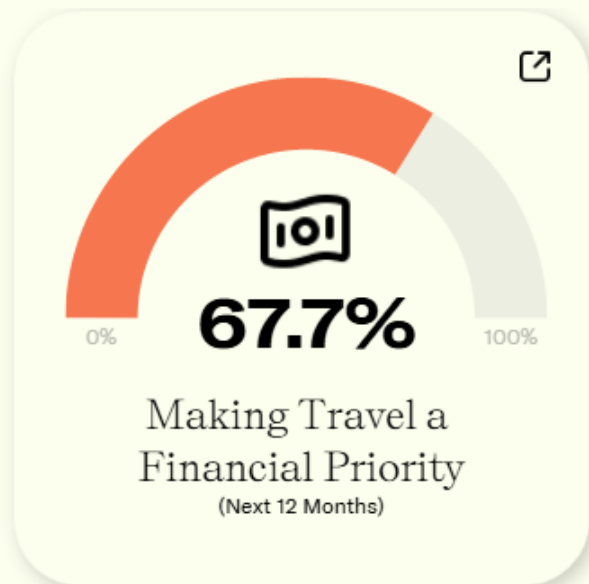
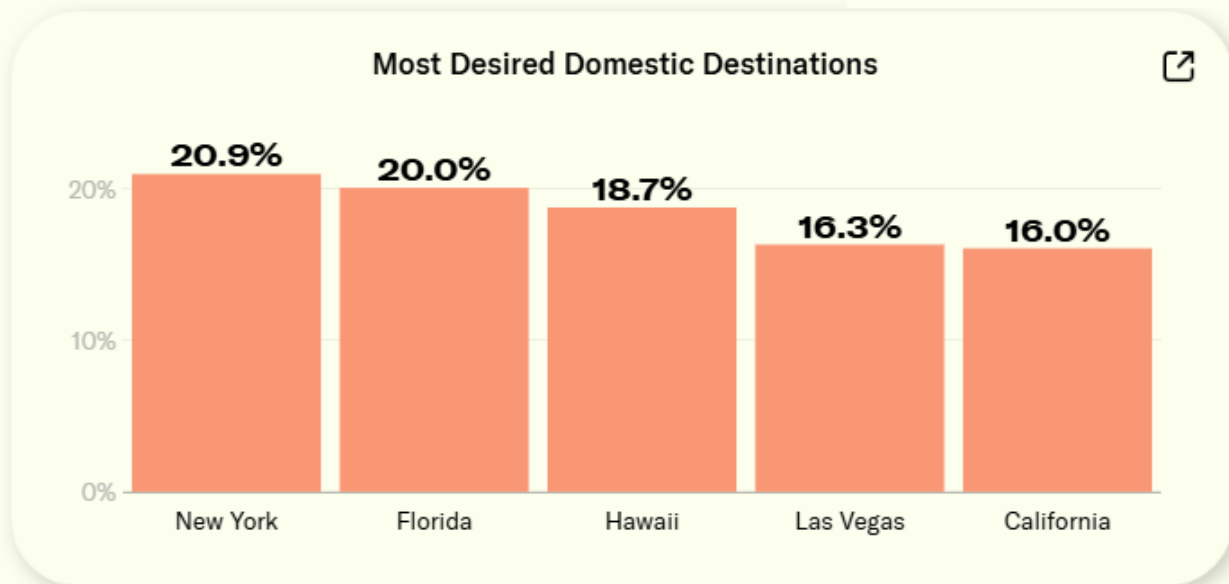
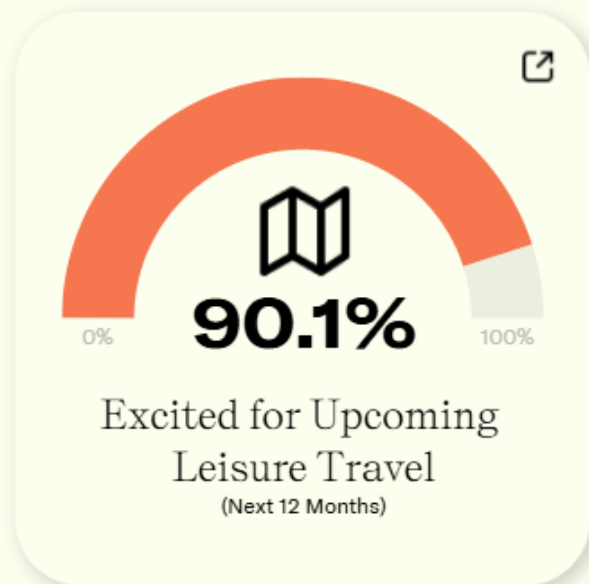
### Paid Accommodations

(Overnight Stay in the Past Two Years)



# Travel Sentiment [🔗](#)

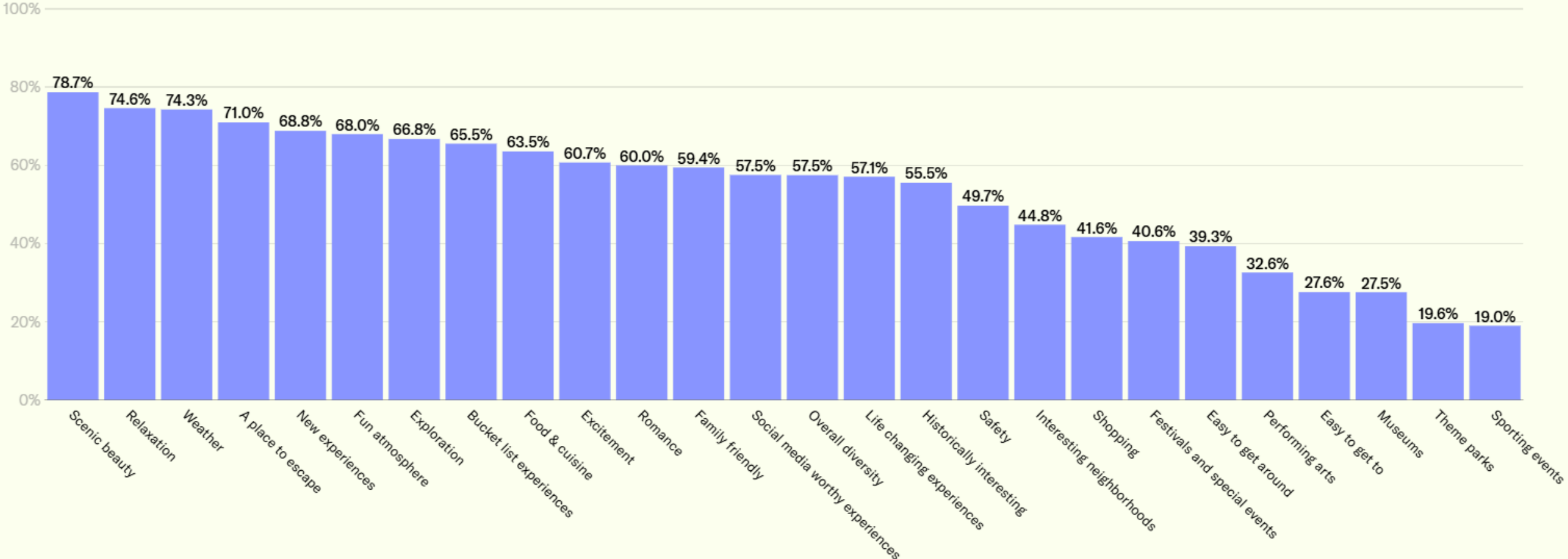
## Out-of-State Likely Visitors to Hawaii (Next 12 Months)



# Destination Attributes Ratings

## Hawaii, 2024 YTD


(Top 2 Box - % Rating the Attribute "Good" or "Extremely good" for Hawaii)



Question: Please think about Hawaii as a place to visit for leisure. Given what you currently know about it, please rate the destination for each of these attributes.

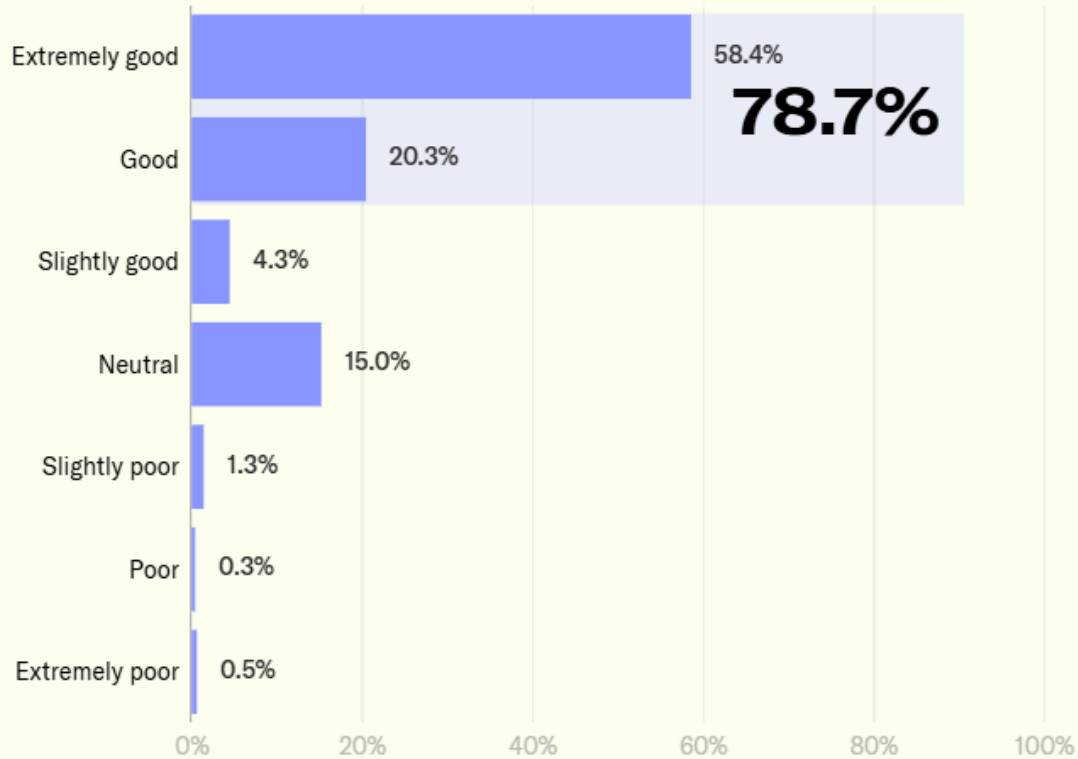
# Destination Attributes - Detail

Destination Attribute

Scenic beauty 

## Hawaii, 2024 YTD

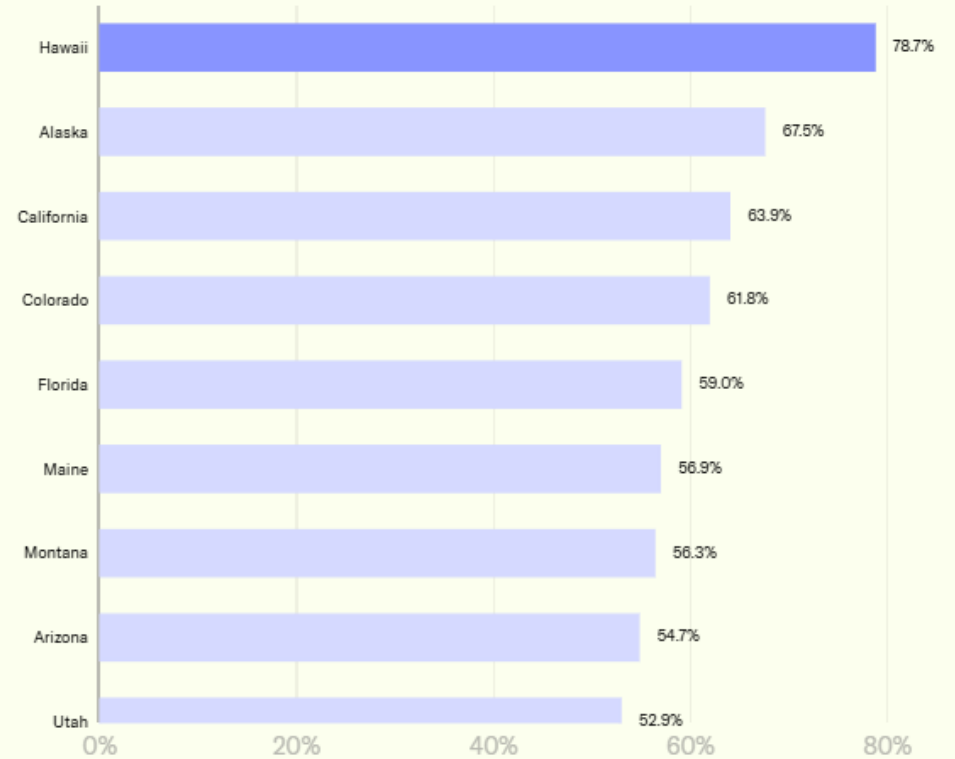
Rating of "Scenic beauty" for Hawaii



Base: Hawaii set, 2024 YTD respondents.  
662 completed surveys.

## States Ranked, 2024 YTD


(Top 2 Box - % Rating the Destination "Good" or "Extremely good" for: Scenic beauty)



Base: Total respondents, 2024 YTD respondents.  
65,584 completed surveys.

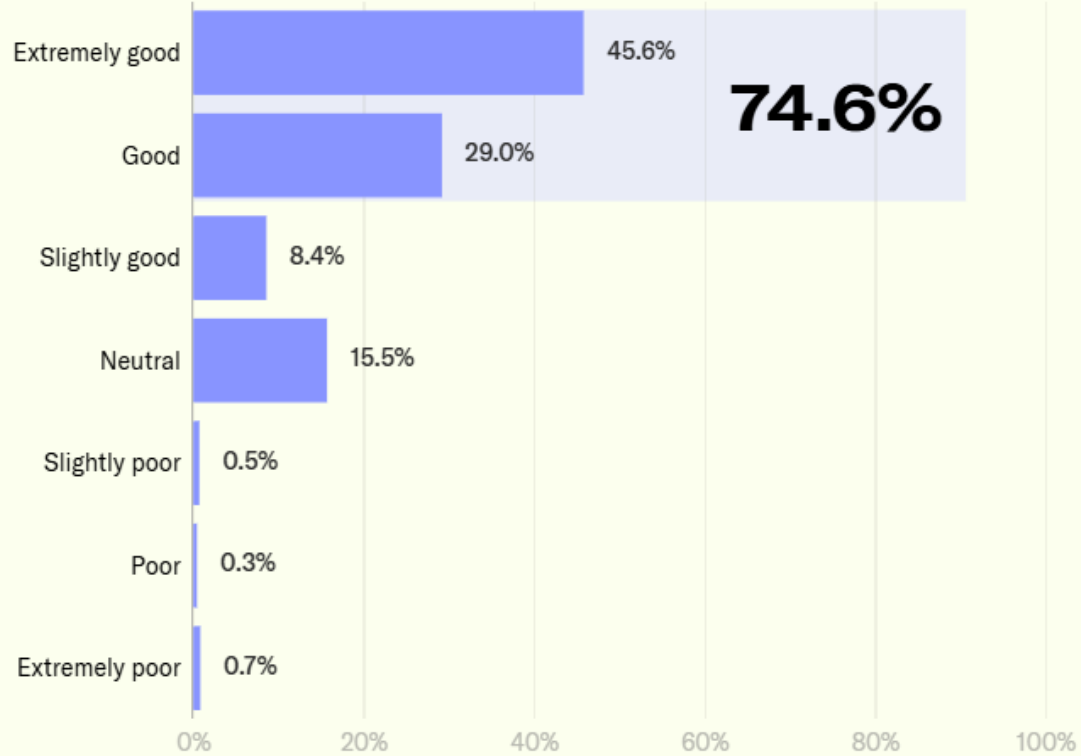
# Destination Attributes - Detail

Destination Attribute

Relaxation 

## Hawaii, 2024 YTD

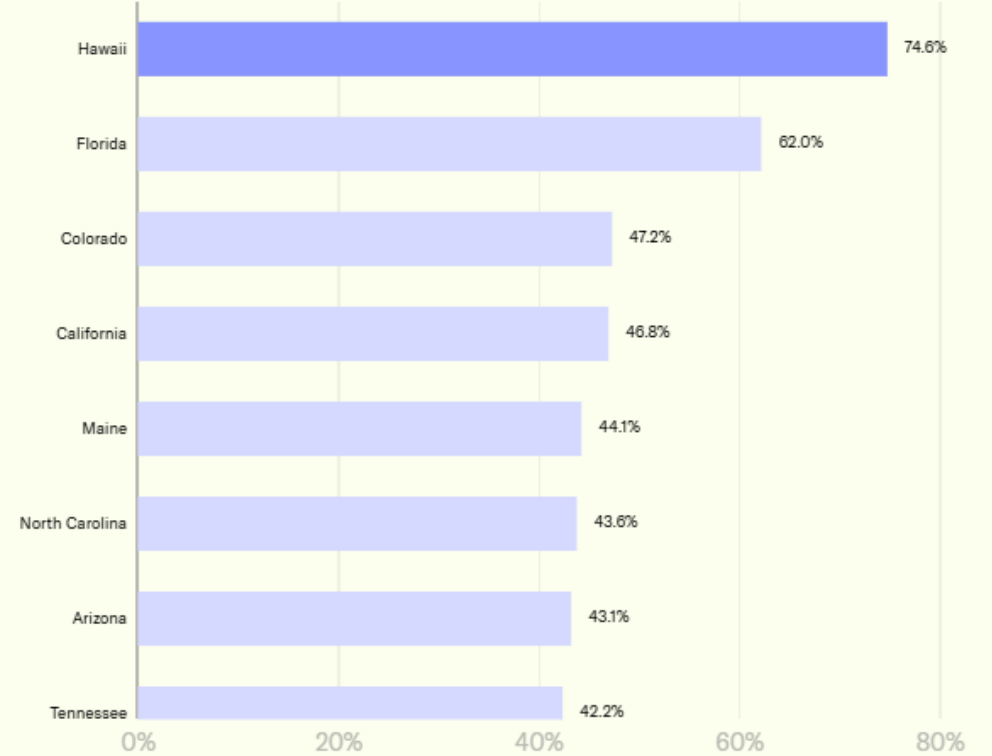
Rating of "Relaxation" for Hawaii



Base: Hawaii set, 2024 YTD respondents.  
662 completed surveys.

## States Ranked, 2024 YTD

(Top 2 Box - % Rating the Destination "Good" or "Extremely good" for: Relaxation)



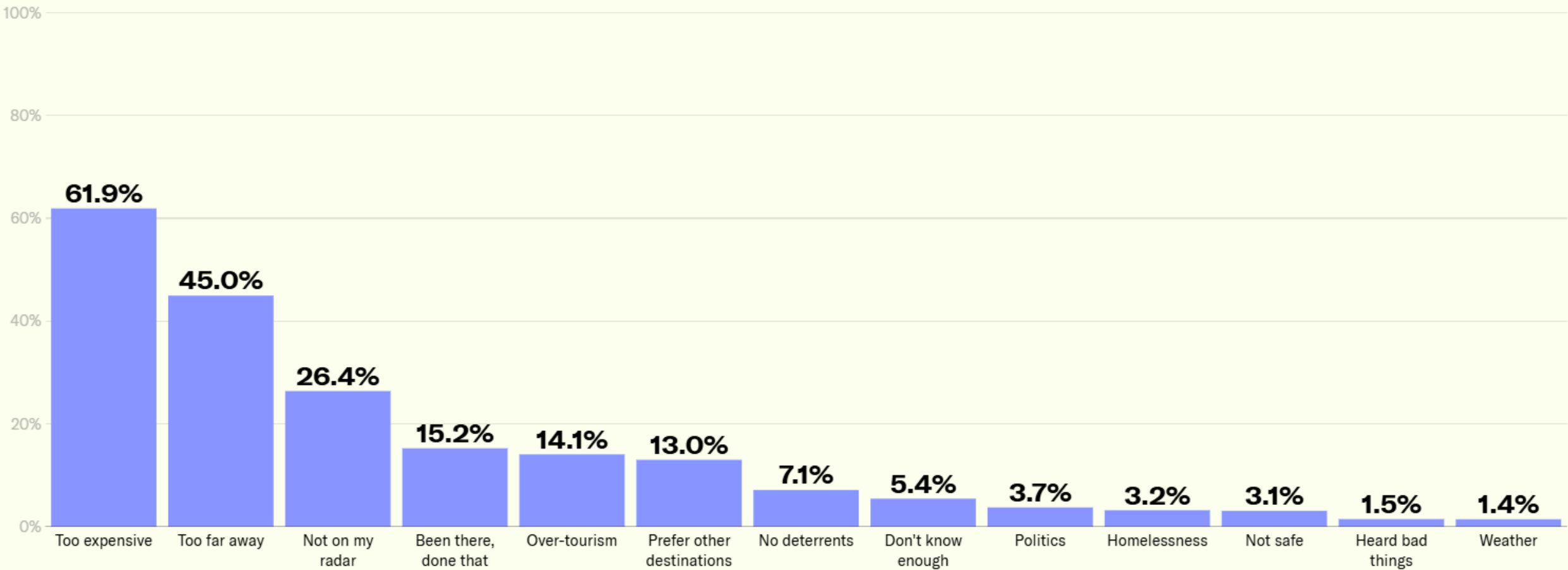
Base: Total respondents, 2024 YTD respondents.  
65,584 completed surveys.



# Destination Deterrents

## Hawaii, 2024 YTD

Deterrents for Traveling to Hawaii for Respondents Unlikely To Visit in the Next Two Years



Question: Which of the following accurately describe why you said you're unlikely to visit Hawaii in the NEXT TWO (2) YEARS?



# Thank You!

## **David Reichbach**

Vice President of Development  
[dreichbach@futurepartners.com](mailto:dreichbach@futurepartners.com)