VISION INSIGHTS

Vision Insights U.S. Traveler Profiles September 2024

October 28, 2024





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 Hawaii 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

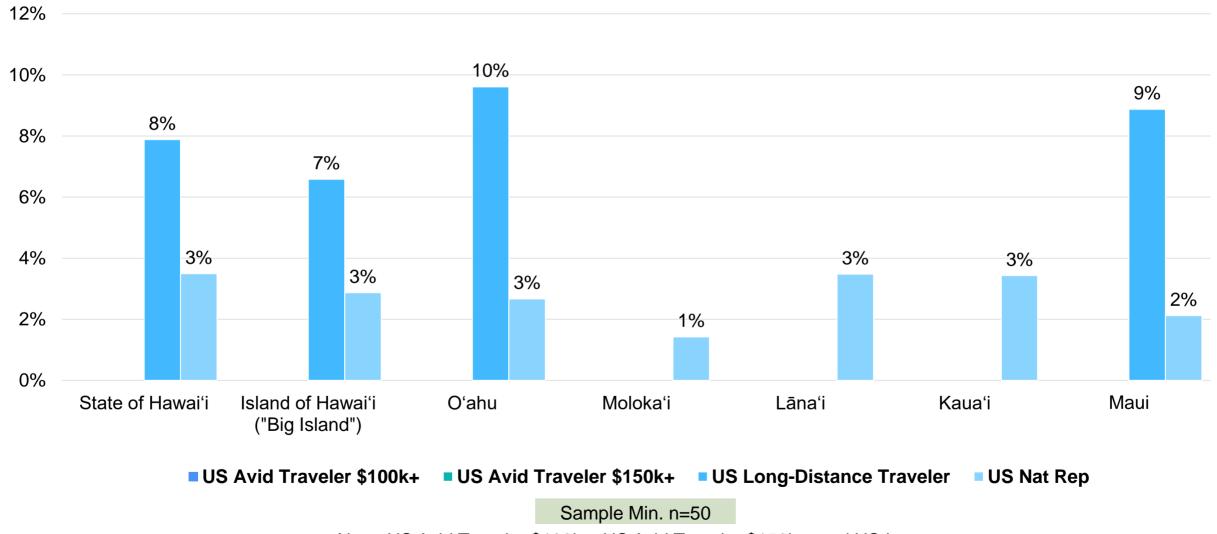
Avid Traveler \$150k+

- 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)

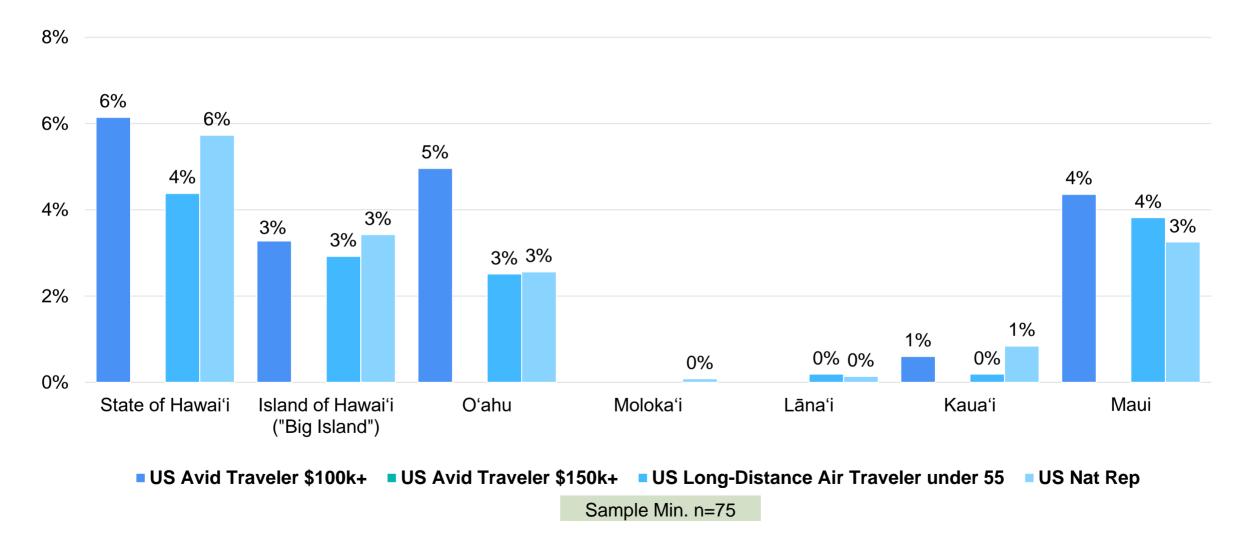
 Representative of U.S. adults in terms of age, gender, social class and education

U.S. - Leisure Trip In Past 12 Months



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

	%
New York	19.3%
California	18.8%
Florida	8.0%
Texas	7.3%
Georgia	3.8%
Pennsylvania	3.7%
Washington	3.1%
Minnesota	2.4%
Virginia	1.2%
Illinois	0.0%

	%
Florida	9.3%
New York	7.8%
Texas	6.9%
California	6.0%
Pennsylvania	5.4%
Illinois	3.3%
Washington	2.6%
Virginia	2.3%
New Jersey	2.2%
Colorado	1.0%

	%
New York	12.0%
Florida	9.9%
California	8.1%
Georgia	6.0%
Pennsylvania	5.5%
Texas	5.2%
Washington	2.5%
Illinois	2.4%
Virginia	2.0%
Minnesota	1.2%

	%
Florida	9.3%
New York	7.8%
Texas	6.9%
California	6.0%
Georgia	5.5%
Pennsylvania	5.4%
North Carolina	4.5%
Ohio	4.0%
Illinois	3.3%
Virginia	2.3%
n-1 817	

Sample Size:

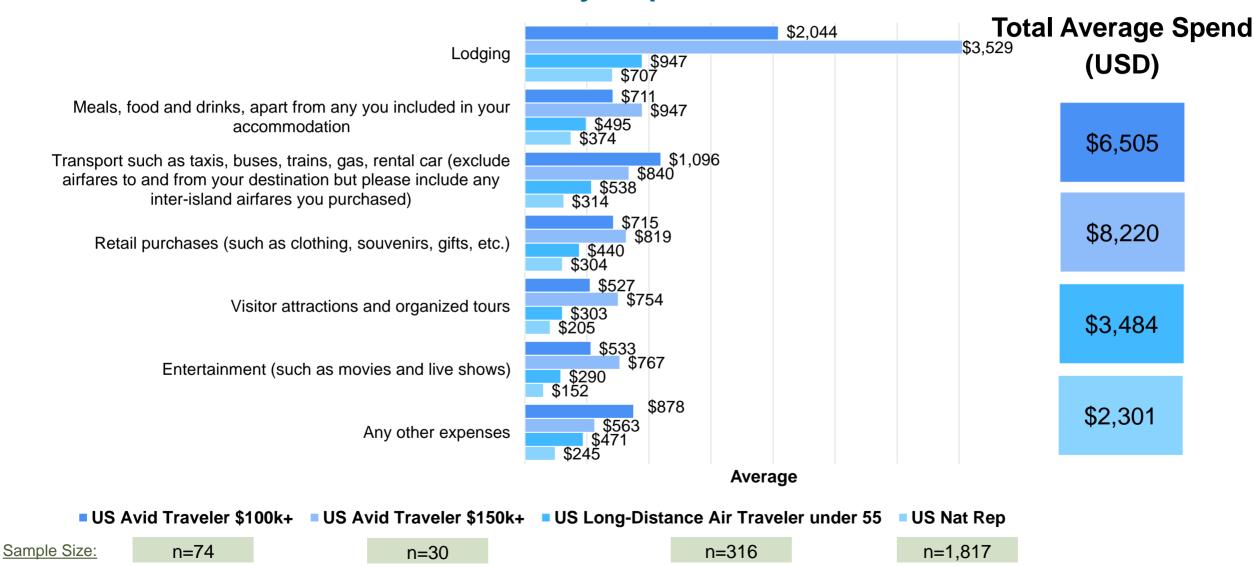
n=74

n=30

n=316

n=1,817

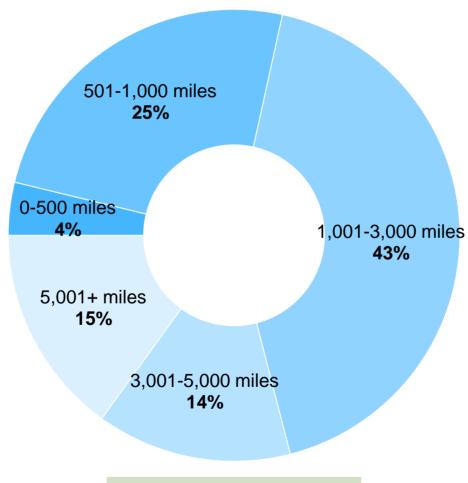
U.S. - Total Annual Holiday Spend



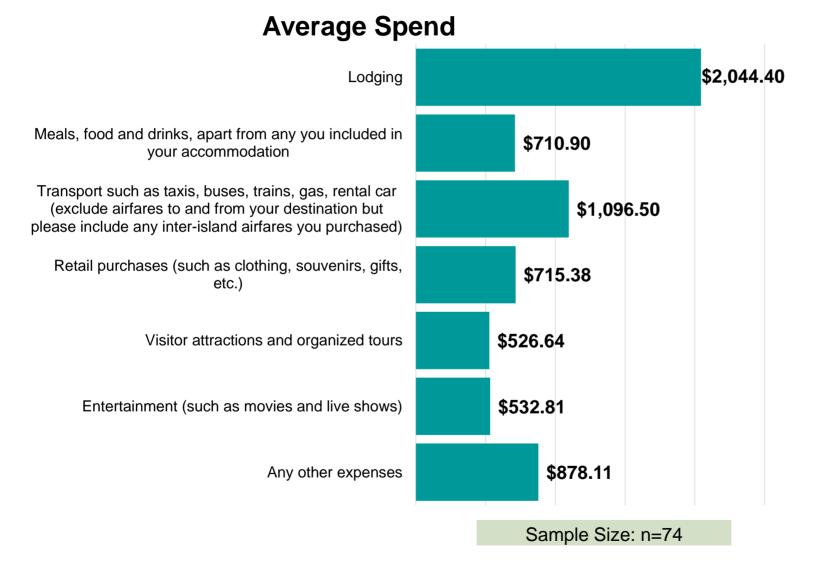
7

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

Distance Travelled on Annual Vacation



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



Spend Per Person Per Day

7.4

Ave # Nights on Annual Vacation

3.5

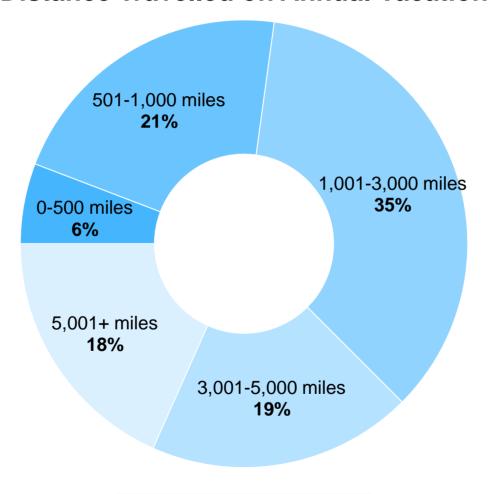
Ave # of People on Annual Vacation



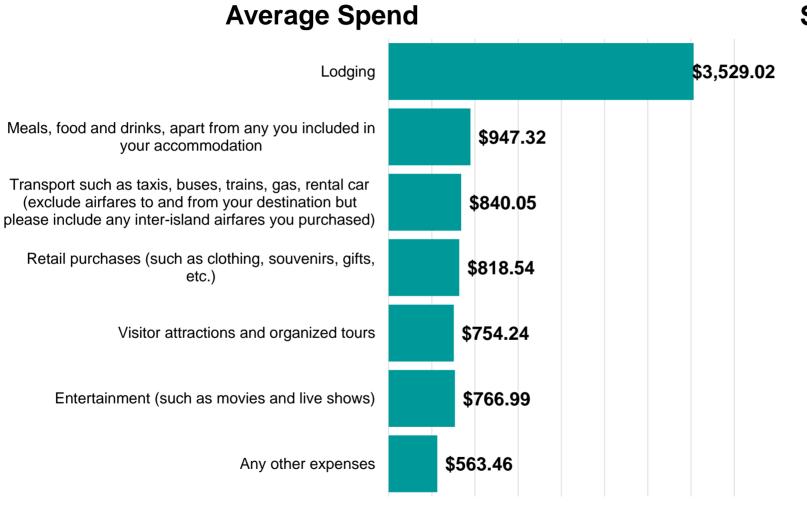
Ave. Per Person Per Day Spend

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

Distance Travelled on Annual Vacation



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



Spend Per Person Per Day

5.9

Ave # Nights on Annual Vacation

3.3

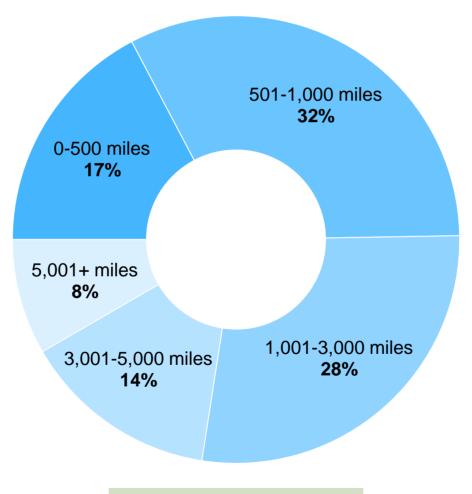
Ave # of People on Annual Vacation



Ave. Per Person Per Day Spend

U.S. Long-Distance Travelers: Annual Vacation

Distance Travelled on Annual Vacation



U.S. Long-Distance Travelers: Annual Vacation

Average Spend

\$946.51 Lodging Meals, food and drinks, apart from any you included in \$495.44 your accommodation Transport such as taxis, buses, trains, gas, rental car (exclude airfares to and from your destination but please \$537.65 include any inter-island airfares you purchased) Retail purchases (such as clothing, souvenirs, gifts, etc.) \$439.64 \$303.16 Visitor attractions and organized tours \$290.44 Entertainment (such as movies and live shows) \$471.42 Any other expenses Sample Size: n=316

Spend Per Person Per Day

6.4

Ave # Nights on Annual Vacation

3.9

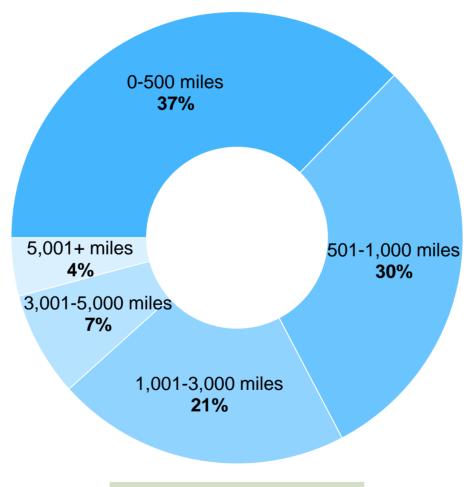
Ave # of People on Annual Vacation



Ave. Per Person Per Day Spend

U.S. Nat Rep: Annual Vacation

Distance Travelled on Annual Vacation



U.S. Nat Rep: Annual Vacation

Average Spend



Spend Per Person Per Day

5.5

Ave # Nights on Annual Vacation

3.0

Ave # of People on Annual Vacation



Ave. Per Person Per Day Spend

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	52%	55%	51%	51%
Value for money	44%	52%	50%	57%
Entertainment and nightlife	44%	41%	40%	28%
Consideration of sustainable principles	36%	28%	35%	27%
Natural attractions/activities	54%	51%	47%	44%
Cultural attractions	42%	38%	41%	35%
Opportunity to experience local restaurants/businesses	53%	50%	46%	40%
Family-friendly location and activities	40%	39%	44%	42%
Safe and Secure Destination	59%	65%	56%	62%

Sample Size:

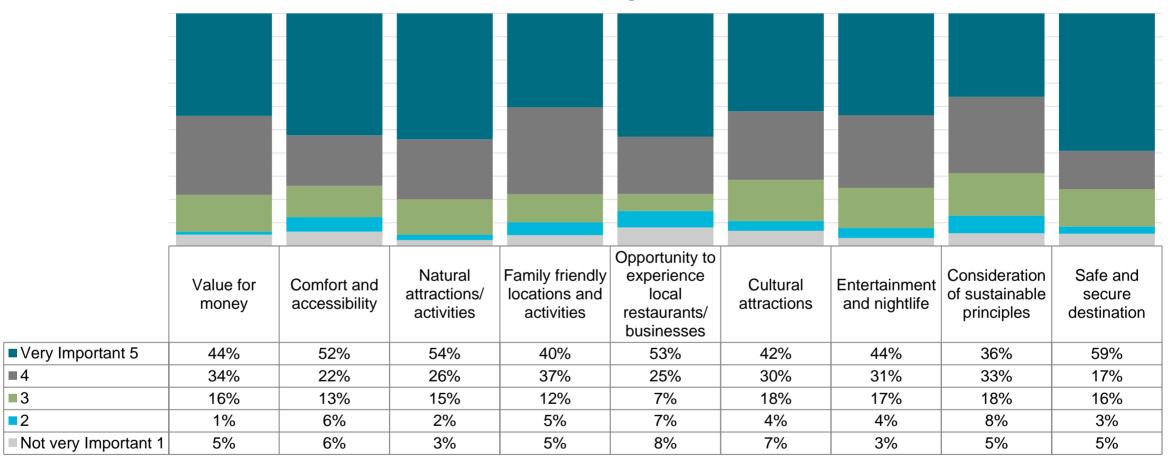
n=74

n=30

n=316

n=1,817

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

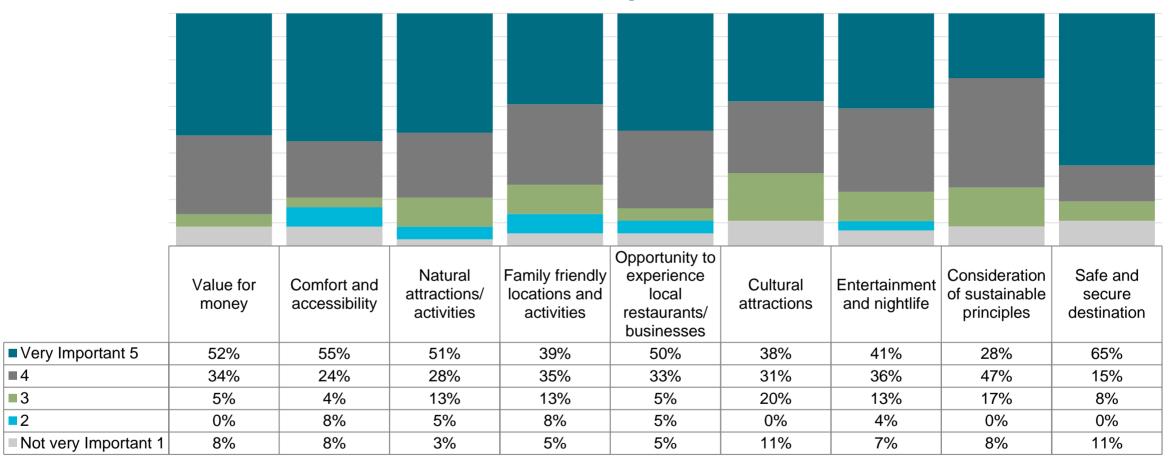


■ Not very Important 1 ■ 2 ■ 3 ■ 4

Sample Size: n=74

■ Very Important 5

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



■ Not very Important 1

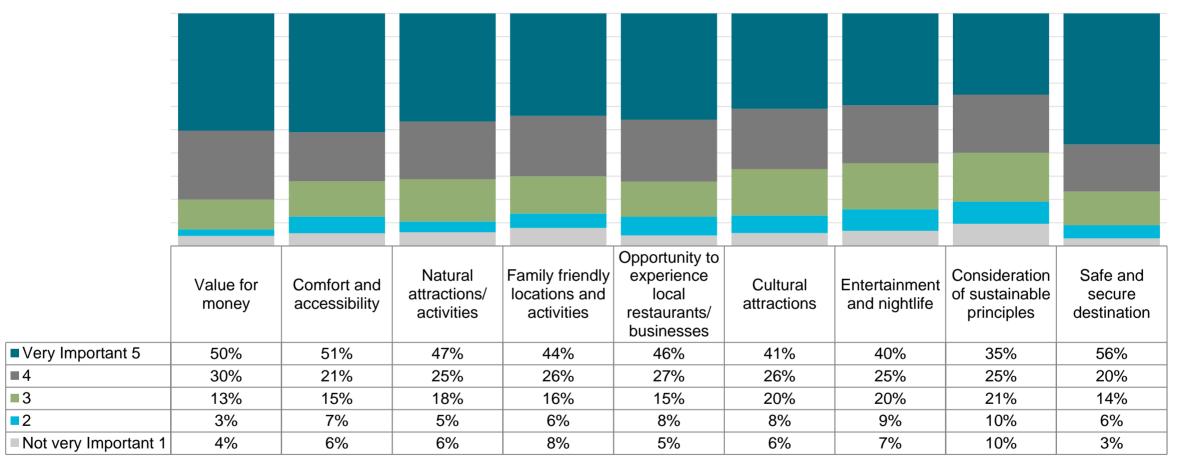
2

3

4

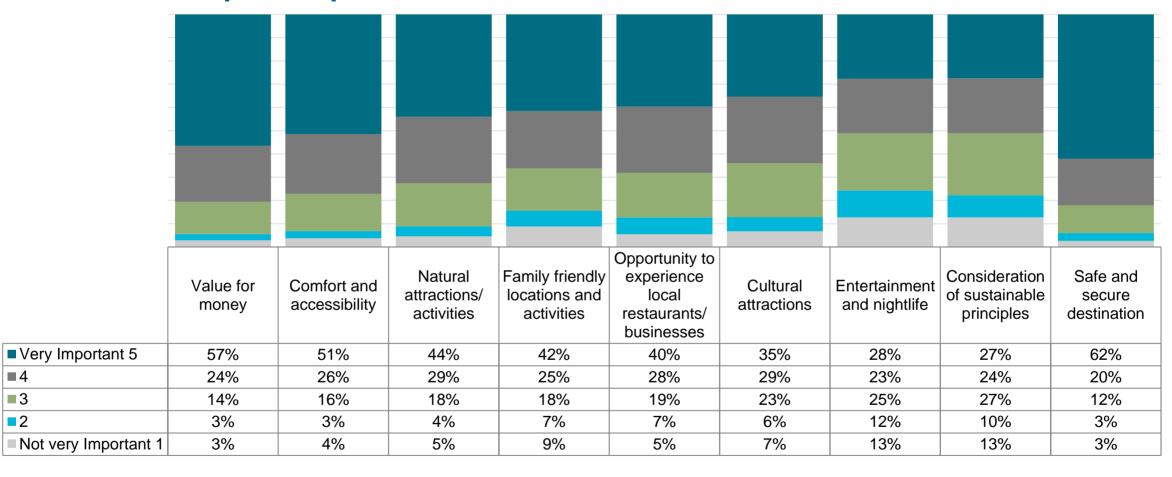
■ Very Important 5

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



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

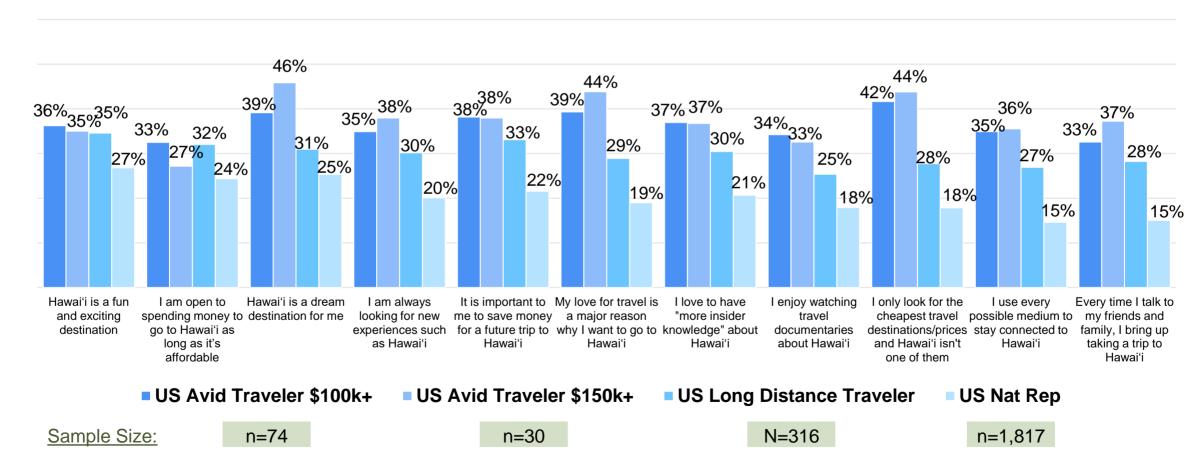
U.S. Nat Rep: Importance of Travel Factors



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

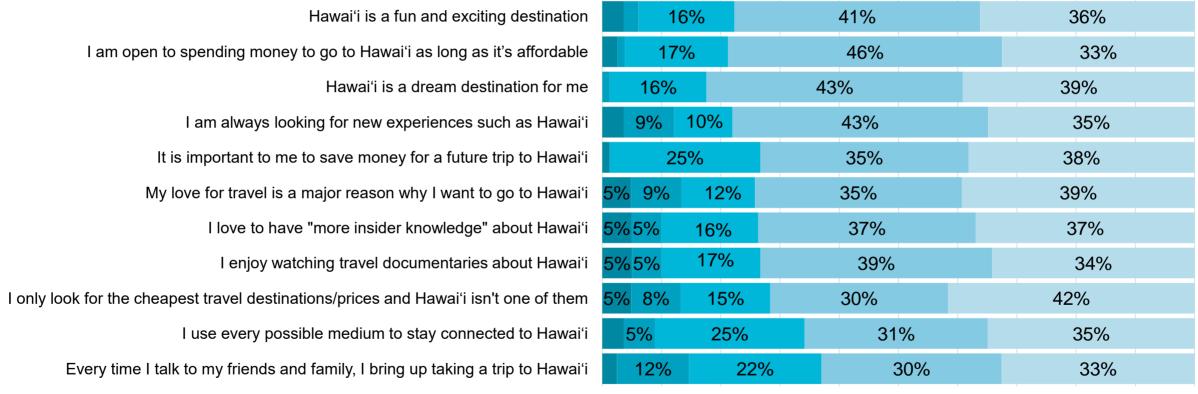
U.S. - Hawai'i as an Aspirational Destination

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



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

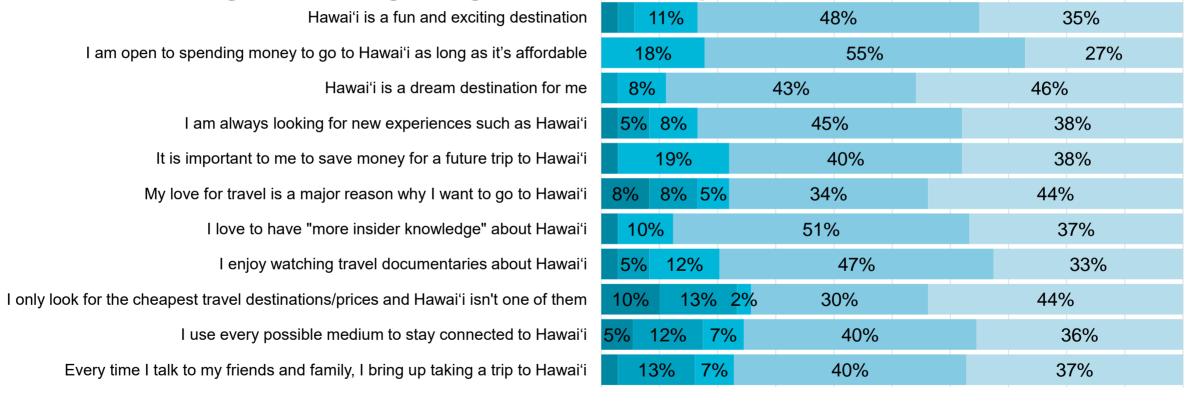
Agreement Regarding Hawai'i as an Aspirational Destination





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

Agreement Regarding Hawai'i as an Aspirational Destination



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

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

Agreement Regarding Hawai'i as an Aspirational Destination

Hawai'i is a fun and exciting destination	5%	19%	38%	35%
I am open to spending money to go to Hawaiʻi as long as it's affordable	5% 7%	18%	39%	32%
Hawai'i is a dream destination for me	8%	22%	37%	31%
I am always looking for new experiences such as Hawaiʻi	6%	20%	40%	30%
It is important to me to save money for a future trip to Hawaiʻi	7%	22%	34%	33%
My love for travel is a major reason why I want to go to Hawaiʻi	5% 11%	% 20%	35%	29%
I love to have "more insider knowledge" about Hawaiʻi	5%5%	24%	36%	30%
I enjoy watching travel documentaries about Hawaiʻi	5% 9%	23%	37%	25%
I only look for the cheapest travel destinations/prices and Hawai'i isn't one of them	7% 12	2% 24	% 30%	28%
I use every possible medium to stay connected to Hawaiʻi	6% 11%	% 27	% 29%	27%
Every time I talk to my friends and family, I bring up taking a trip to Hawaiʻi	7% 11	% 25	% 29%	28%

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

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

Agreement Regarding Hawai'i as an Aspirational Destination

Hawaiʻi is a fun and exciting destination	269		41%	27%
I am open to spending money to go to Hawaiʻi as long as it's affordable	6% 7%	23%	40%	24%
Hawai'i is a dream destination for me	7% 10%	27%	31%	25%
I am always looking for new experiences such as Hawaiʻi	7% 9%	30%	35%	20%
It is important to me to save money for a future trip to Hawaiʻi	10% 12%	29%	28%	22%
My love for travel is a major reason why I want to go to Hawaiʻi	9% 12%	31%	29%	19%
I love to have "more insider knowledge" about Hawaiʻi	7% 8%	32%	33%	21%
I enjoy watching travel documentaries about Hawaiʻi	8% 11%	31%	33%	18%
I only look for the cheapest travel destinations/prices and Hawai'i isn't one of them	8% 14%	35%	25%	18%
I use every possible medium to stay connected to Hawaiʻi	13% 1	7%	33% 22%	15%
Every time I talk to my friends and family, I bring up taking a trip to Hawai'i	18%	18%	28% 21%	15%

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

U.S. - Sustainability and Travel Responsibility Statements

Agreement Regarding Sustainable Practices While Traveling (Strongly Agree)

Feel personal responsibility to take care of the places I visit

Practice 'leave no trace' when traveling to protect the environment

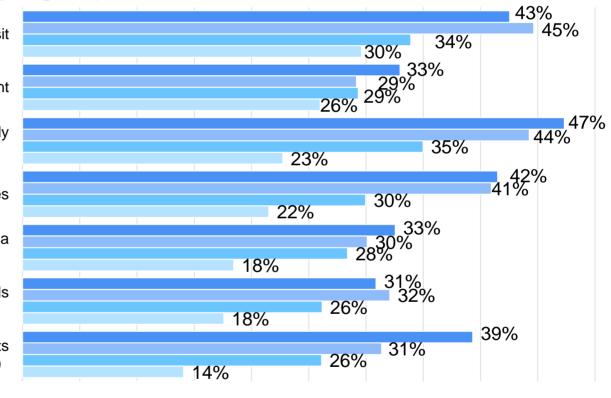
Care about the environment and take extra steps to travel in an environmentally responsible way

Prioritize comfort and value for money over environmentally friendly 'green' practices

Take the time to learn about local norms and standards prior to travelling to a destination to reduce my impact on the environment/historic sites

Would like to have information about the sustainable management policies of hotels and guesthouses when booking accommodation

Would be willing to pay more for tourism destinations that have explicit components that are environmentally friendly (e.g., reduction of waste, water, and energy use)



US Avid Traveler \$100k+

US Avid Traveler \$150k+

US Long Distance Traveler

US Nat Rep

Sample Size:

n = 74

n = 30

n=316

n=1.817

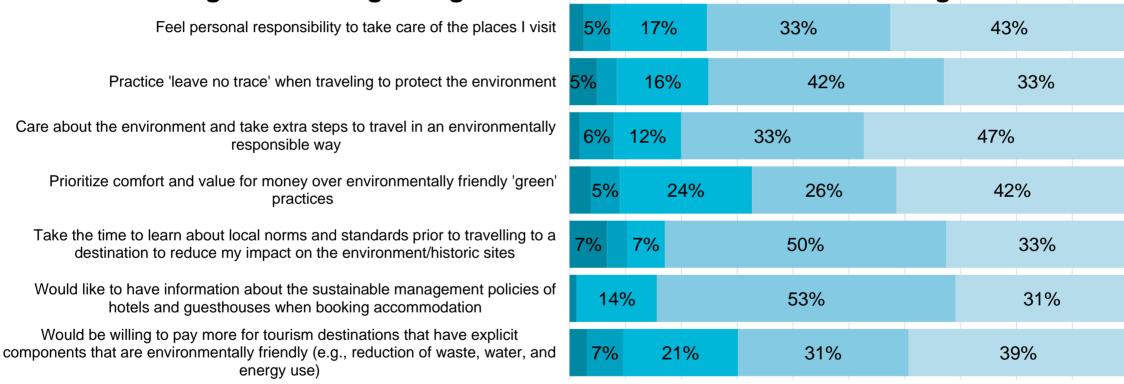
U.S. - Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling (Strongly Agree)



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

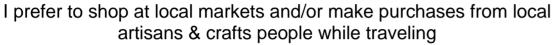
Agreement Regarding Sustainable Practices While Traveling



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

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

Agreement Regarding Sustaining Local Culture While Traveling



I would like to be offered locally sourced food and drink where possible

Sustaining the local culture and community is as important as sustaining the environment to me

I seek out meaningful experiences with the local population in the places I visit

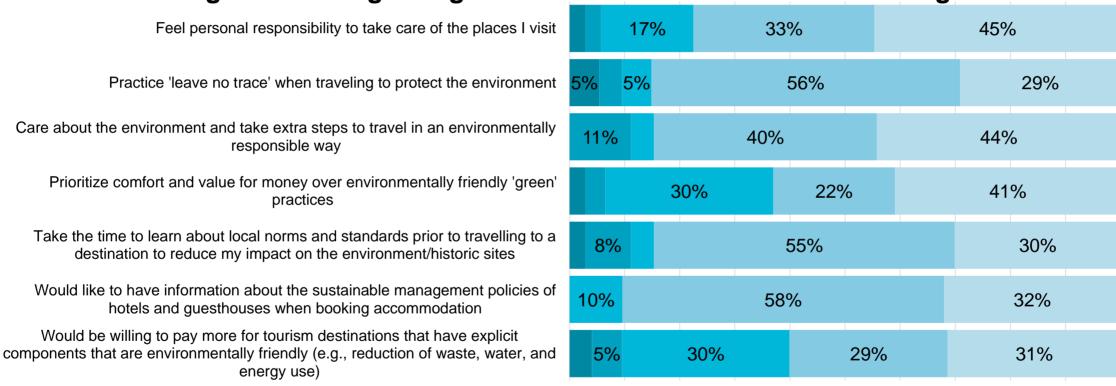
When I travel, I want to understand the destination and 'live like a local' through informed decisions



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

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

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

Agreement Regarding Sustaining Local Culture While Traveling

I prefer to shop at local markets and/or make purchases from local artisans & crafts people while traveling

I would like to be offered locally sourced food and drink where possible

Sustaining the local culture and community is as important as sustaining the environment to me

I seek out meaningful experiences with the local population in the places I visit

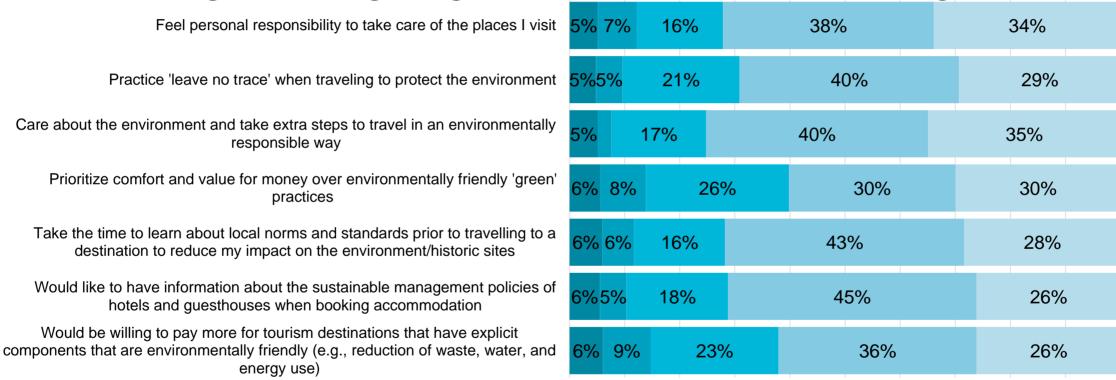
When I travel, I want to understand the destination and 'live like a local' through informed decisions



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

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

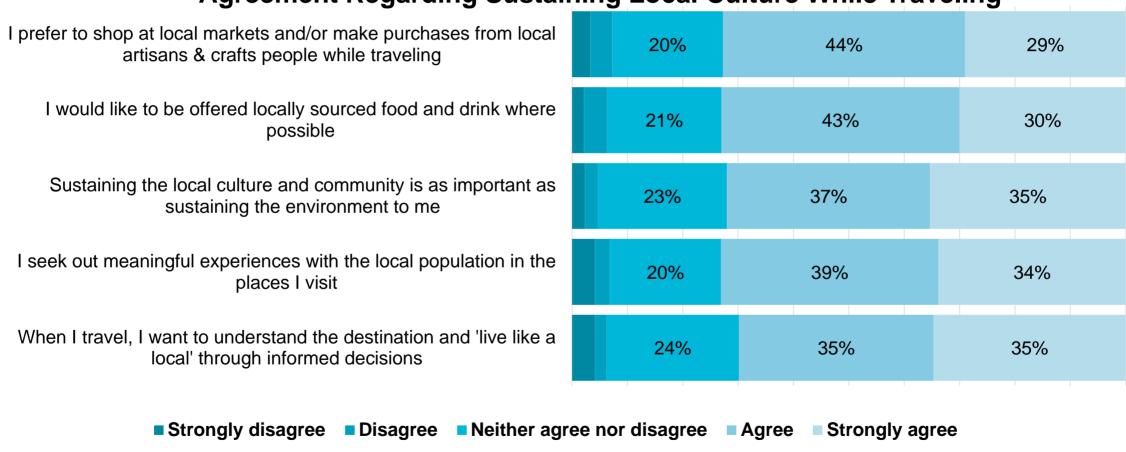
Agreement Regarding Sustainable Practices While Traveling



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

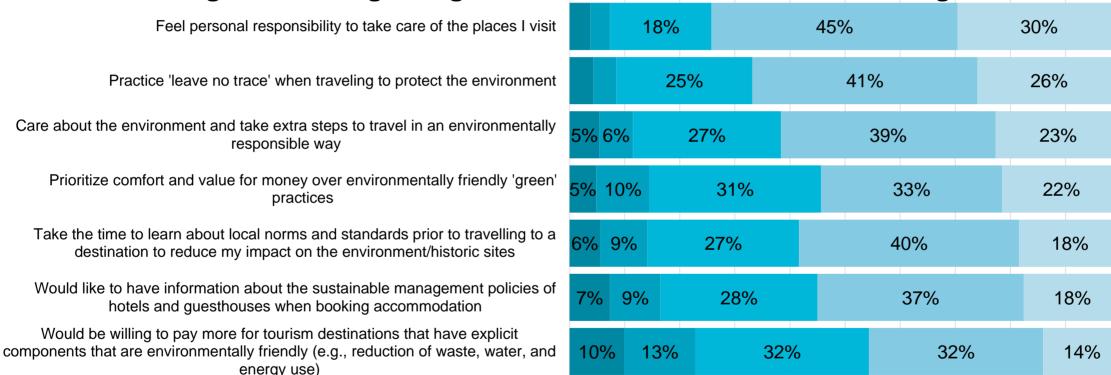
U.S. Long Distance Traveler: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling



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

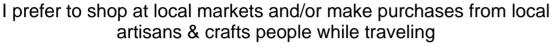
Agreement Regarding Sustainable Practices While Traveling





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

Agreement Regarding Sustaining Local Culture While Traveling



I would like to be offered locally sourced food and drink where possible

Sustaining the local culture and community is as important as sustaining the environment to me

I seek out meaningful experiences with the local population in the places I visit

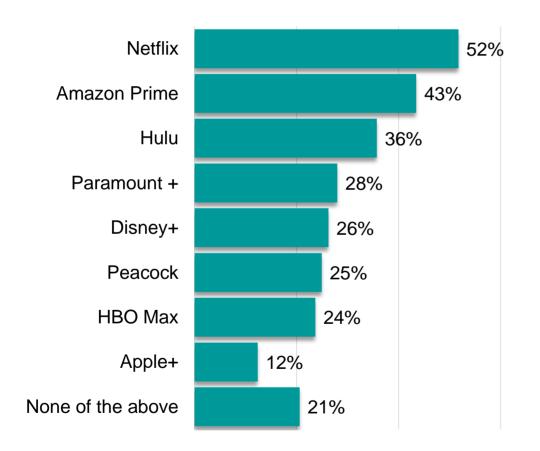
When I travel, I want to understand the destination and 'live like a local' through informed decisions



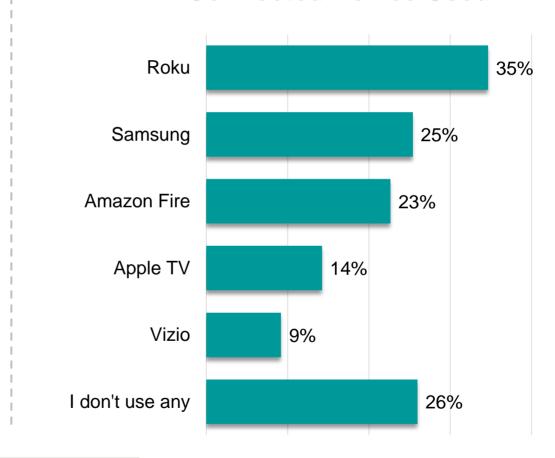
■ Strongly disagree
■ Disagree
■ Neither agree nor disagree
■ Agree
■ Strongly agree

U.S. Media Consumption

Streaming Platforms Used Weekly

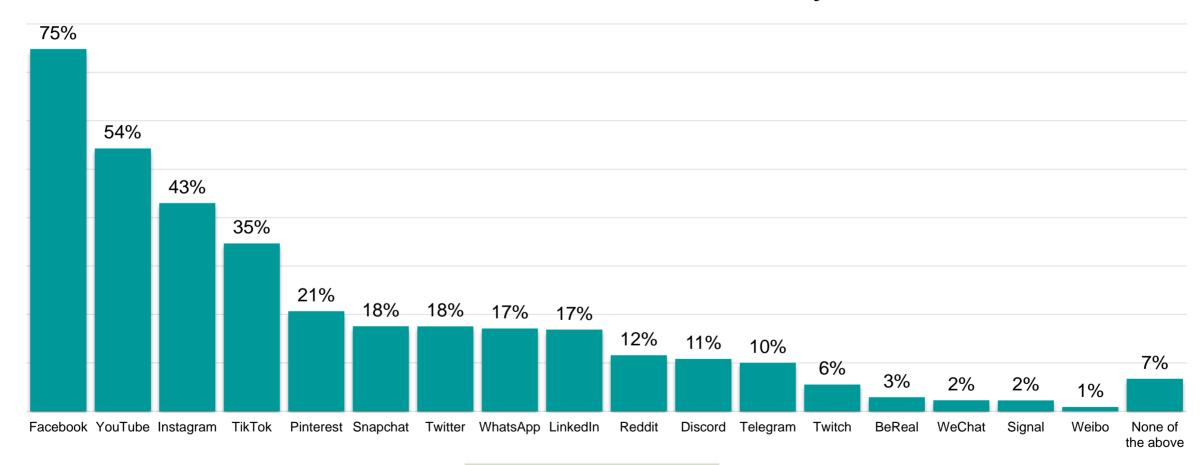


Connected Device Used



U.S. Media Consumption

Social Media Platforms Used Weekly



U.S. Media Consumption

Travel Destination Source of Awareness

Friends/Family	45%
Online	31%
Social Media	39%
TV commercials	29%
YouTube	34%
TV Program/Documentary	21%
Email	17%
Radio	10%
Newspaper	12%
Out of home advertising (e.g. Poster Billboards, bus shelter advertisements, etc.)	8%
I don't recall	12%

Actions Taken After Seeing an Ad for a Destination

I search for information about the destination online	41%
I talk to friends/family about the destination	34%
I go to the destination's website	31%
I look up the destination on social media	25%
I book travel to the destination almost immediately	12%
I don't do anything	18%
None of the above	9%