



# **Vision Insights U.S. Traveler Profiles November 2024**

December 18, 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

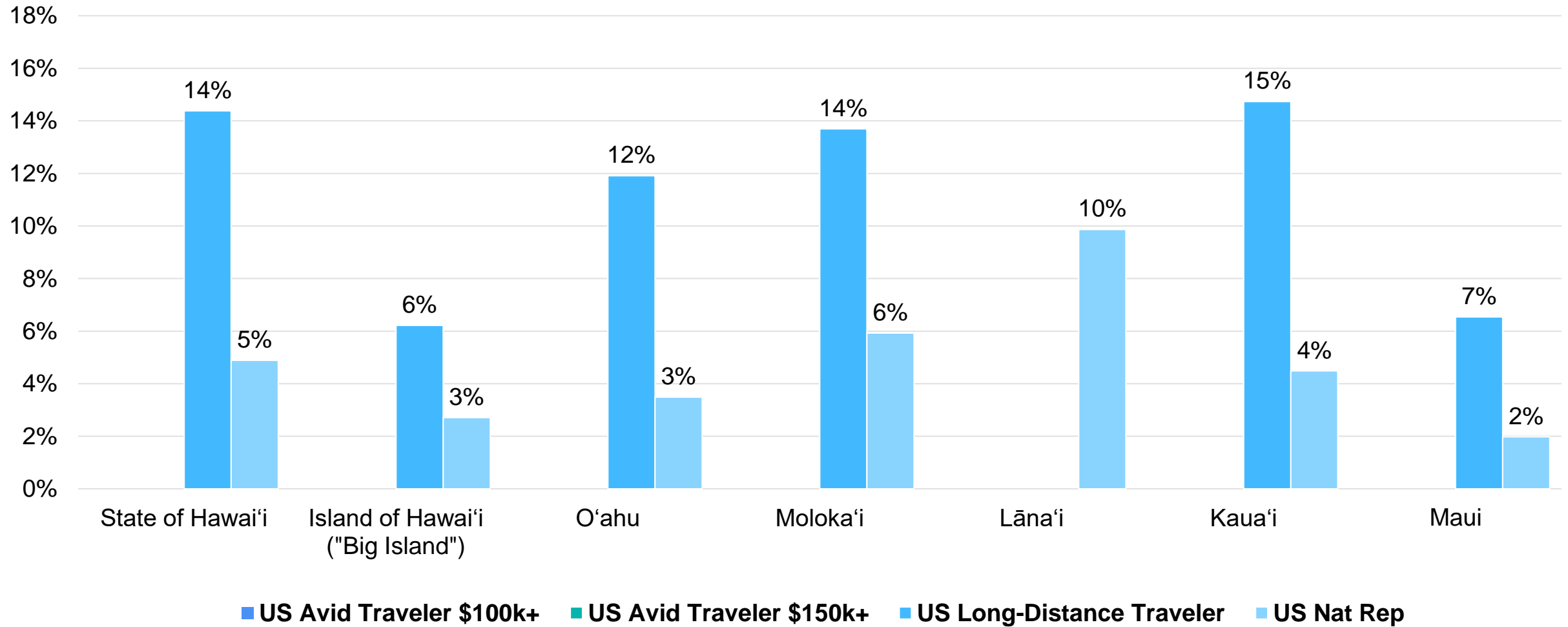
## **Avid Traveler \$150k+**

- 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

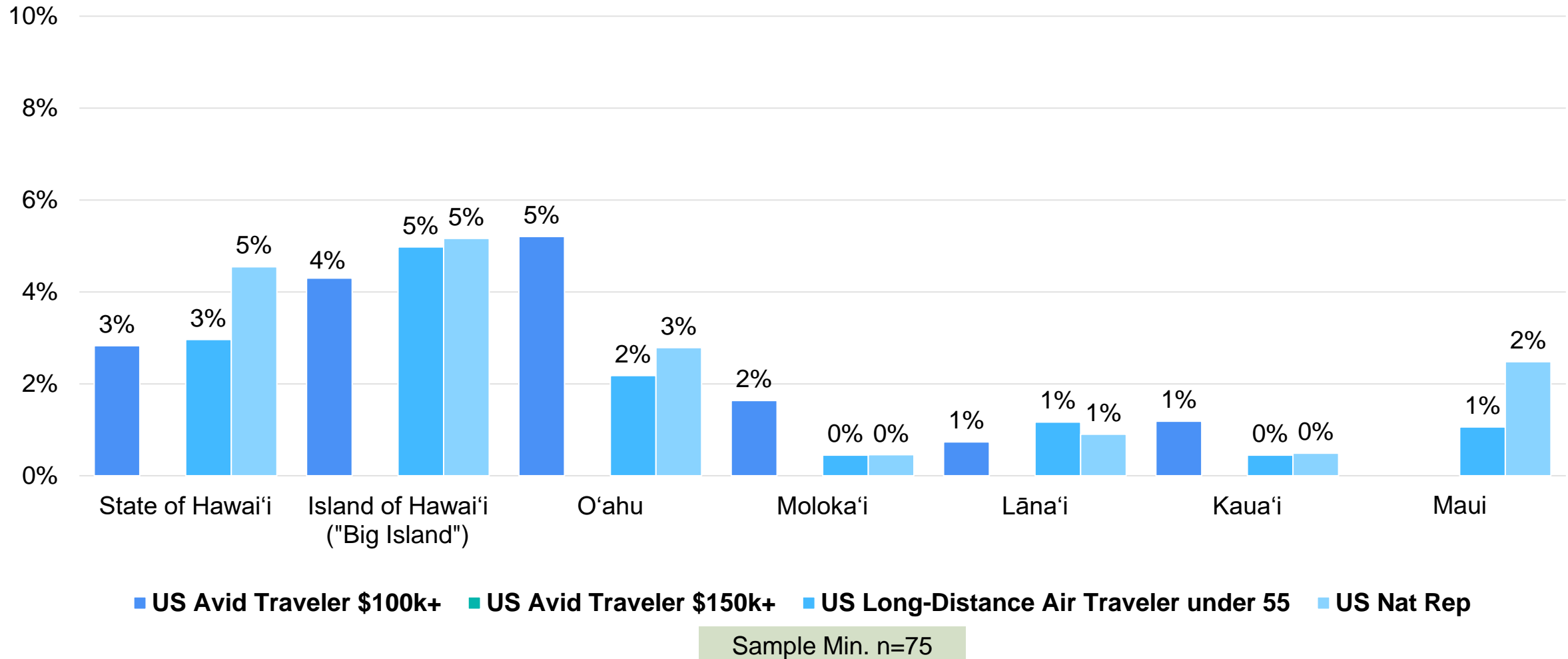
# U.S. - Leisure Trip In Past 12 Months



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

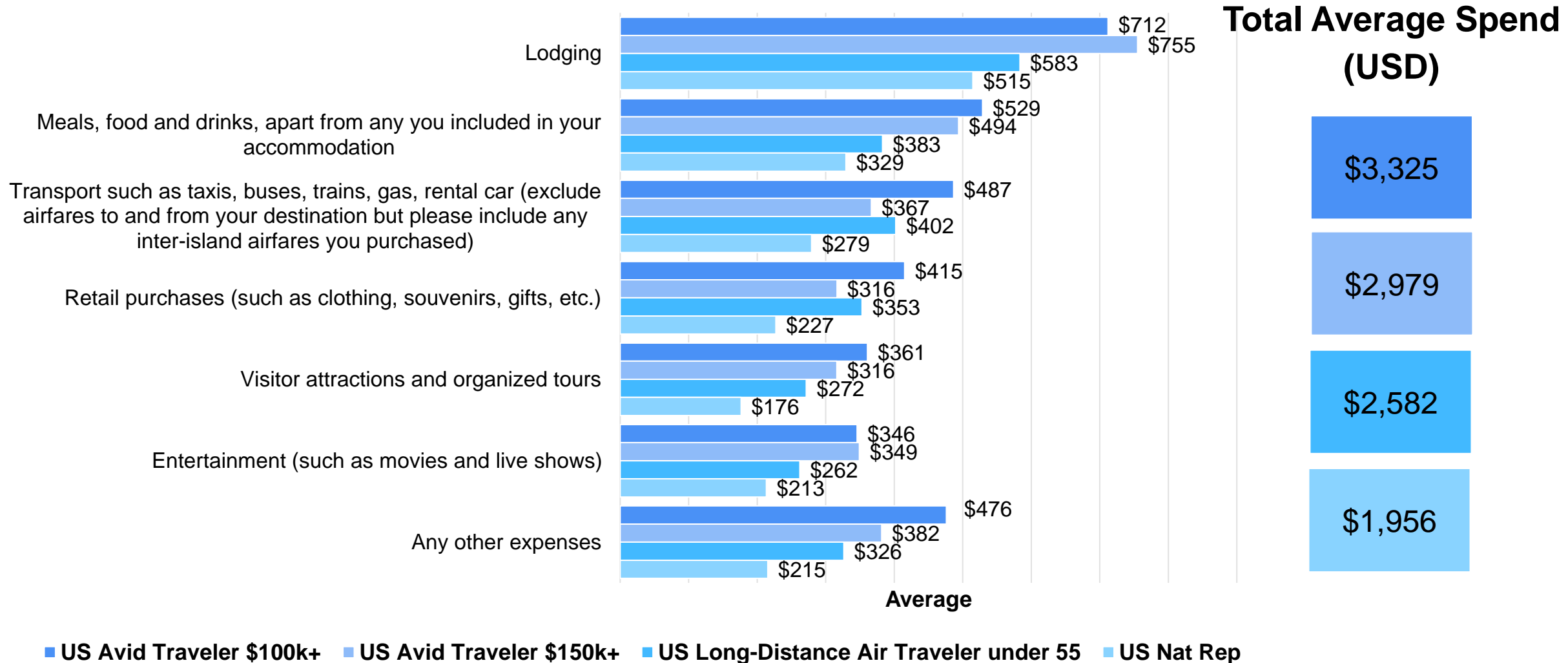
# U.S. – Next Destination for Leisure Trip



# 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	
	%		%		%		%
<b>New York</b>	23.2%	<b>New York</b>	8.4%	<b>New York</b>	13.0%	<b>New York</b>	8.4%
<b>Texas</b>	11.6%	<b>Florida</b>	8.4%	<b>Texas</b>	10.6%	<b>Florida</b>	8.4%
<b>California</b>	11.2%	<b>Texas</b>	7.9%	<b>California</b>	8.2%	<b>Texas</b>	7.9%
<b>Pennsylvania</b>	6.4%	<b>California</b>	6.1%	<b>Florida</b>	5.4%	<b>California</b>	6.1%
<b>Florida</b>	5.7%	<b>Pennsylvania</b>	5.4%	<b>Georgia</b>	4.2%	<b>Pennsylvania</b>	5.4%
<b>Georgia</b>	3.4%	<b>Illinois</b>	3.4%	<b>Pennsylvania</b>	4.2%	<b>North Carolina</b>	4.5%
<b>Washington</b>	3.2%	<b>Virginia</b>	2.5%	<b>Virginia</b>	2.7%	<b>Georgia</b>	4.4%
<b>Virginia</b>	2.1%	<b>New Jersey</b>	1.9%	<b>Illinois</b>	2.5%	<b>Ohio</b>	4.1%
<b>Illinois</b>	0.7%	<b>Washington</b>	1.2%	<b>Washington</b>	1.1%	<b>Illinois</b>	3.4%
<b>Minnesota</b>	0.0%	<b>Colorado</b>	0.8%	<b>Minnesota</b>	0.5%	<b>Virginia</b>	2.5%
<b>Sample Size:</b>	n=132	<b>Sample Size:</b>	n=51	<b>Sample Size:</b>	n=410	<b>Sample Size:</b>	n=1,874

# U.S. - Total Annual Holiday Spend

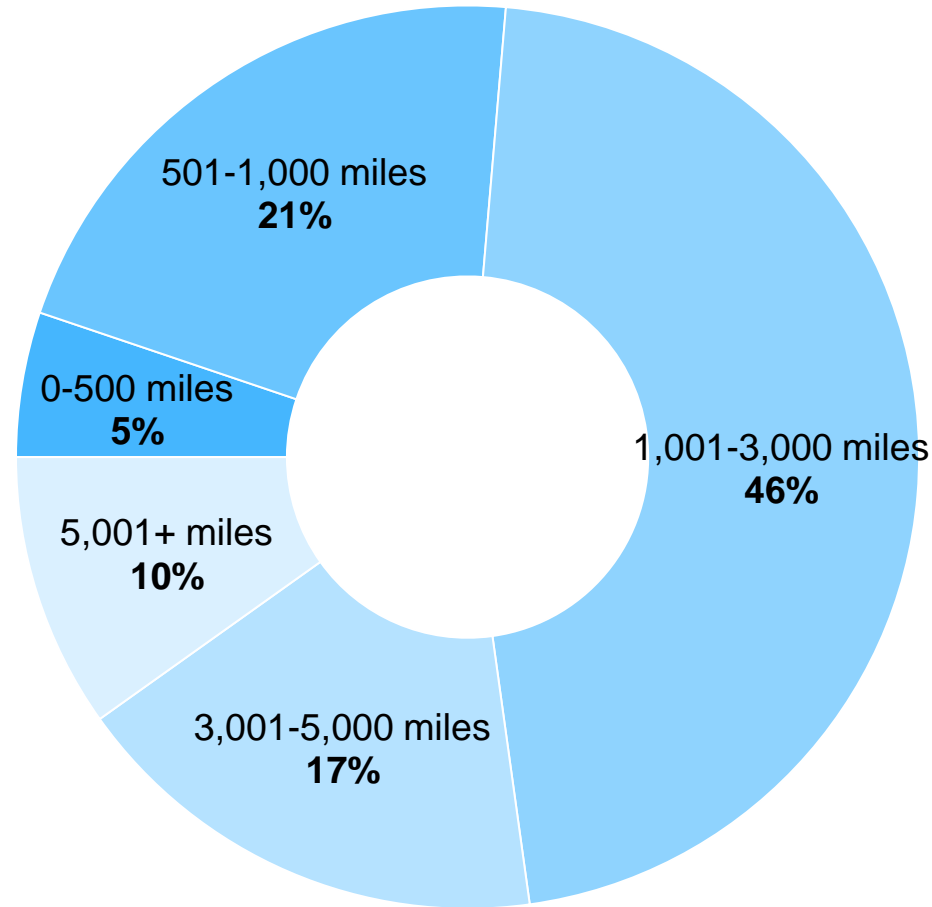


■ US Avid Traveler \$100k+
■ US Avid Traveler \$150k+
■ US Long-Distance Air Traveler under 55
■ US Nat Rep

**Sample Size:**
n=132
n=51
n=410
n=1,874

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

## Distance Travelled on Annual Vacation

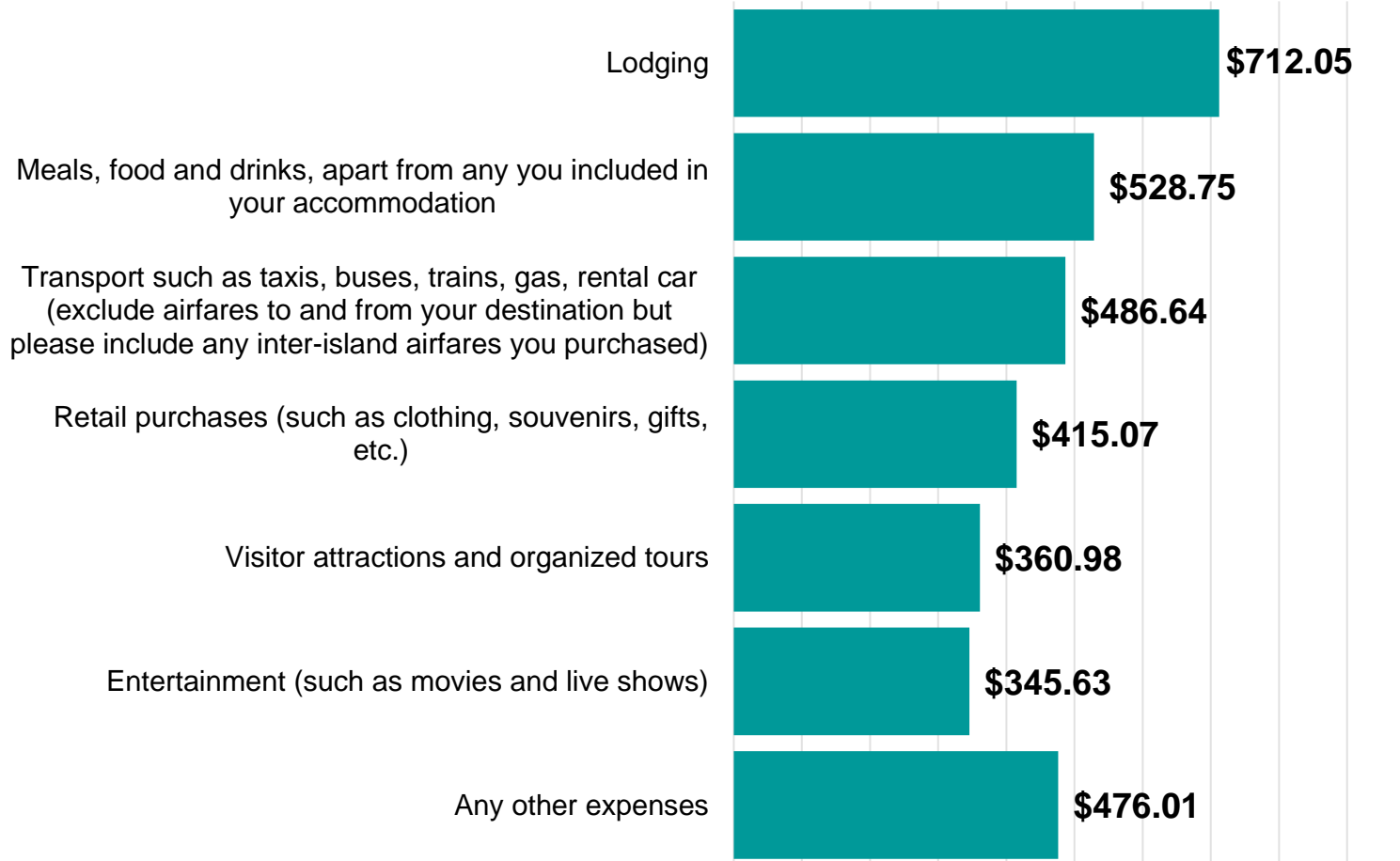


Sample Size: n=132



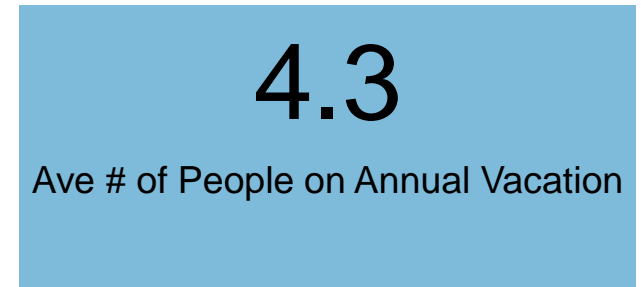
# U.S. Avid Travelers \$100k+: Annual Vacation

## Average Spend



Sample Size: n=132

## Spend Per Person Per Day

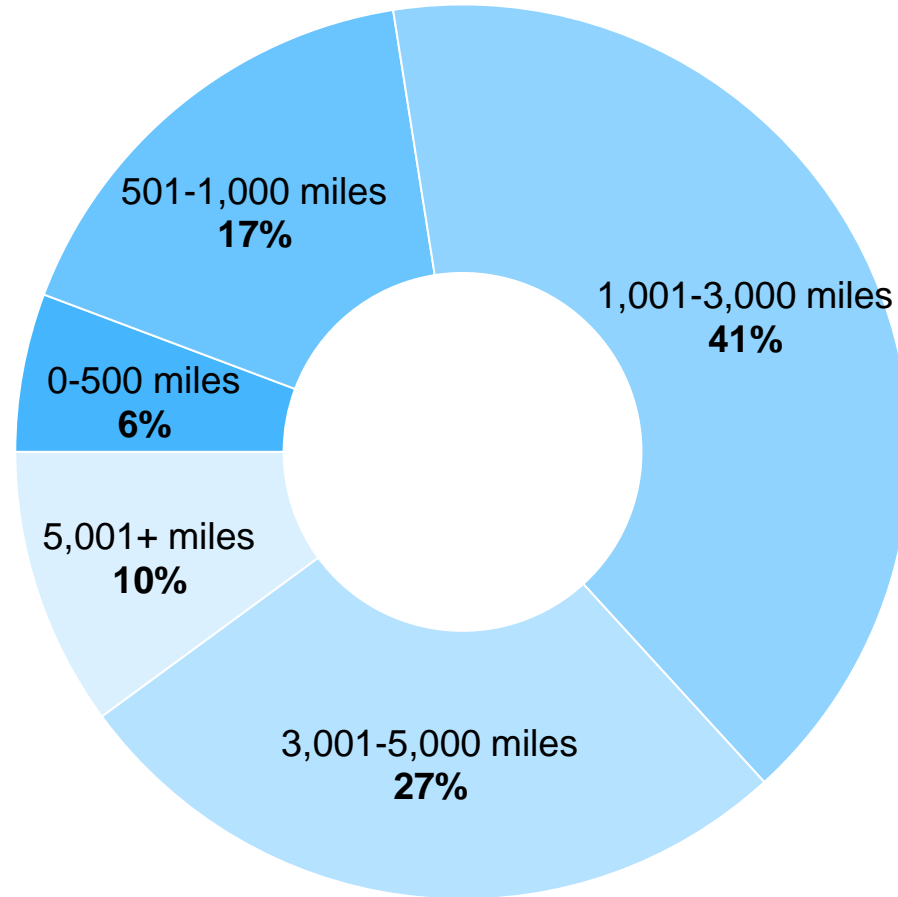


**\$111.50**

Ave. Per Person Per Day Spend

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

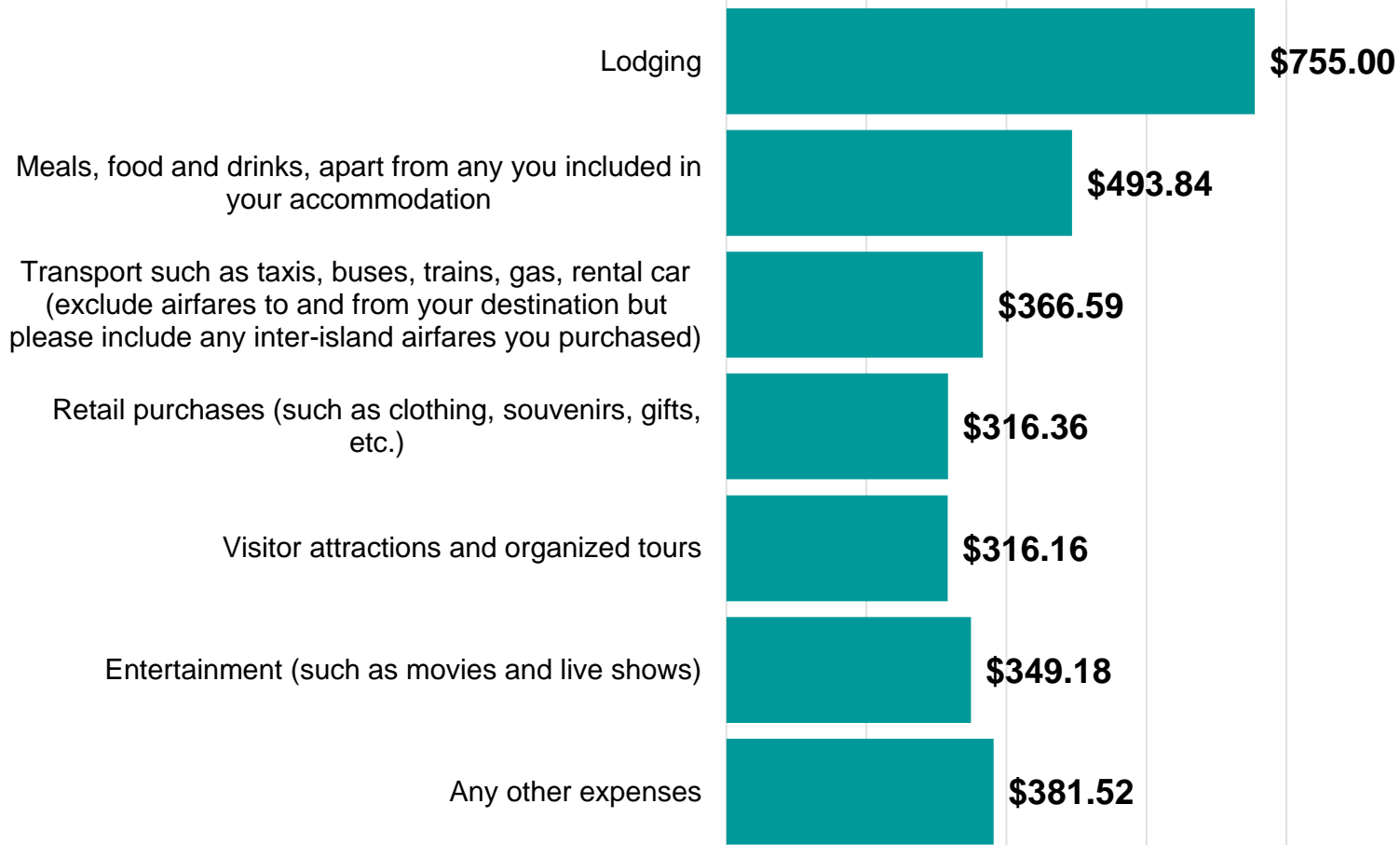
## Distance Travelled on Annual Vacation



Sample Size: n=51

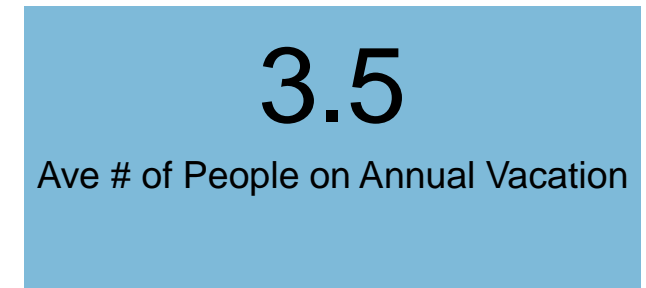
# U.S. Avid Travelers \$150k+: Annual Vacation

## Average Spend



Sample Size: n=51

## Spend Per Person Per Day

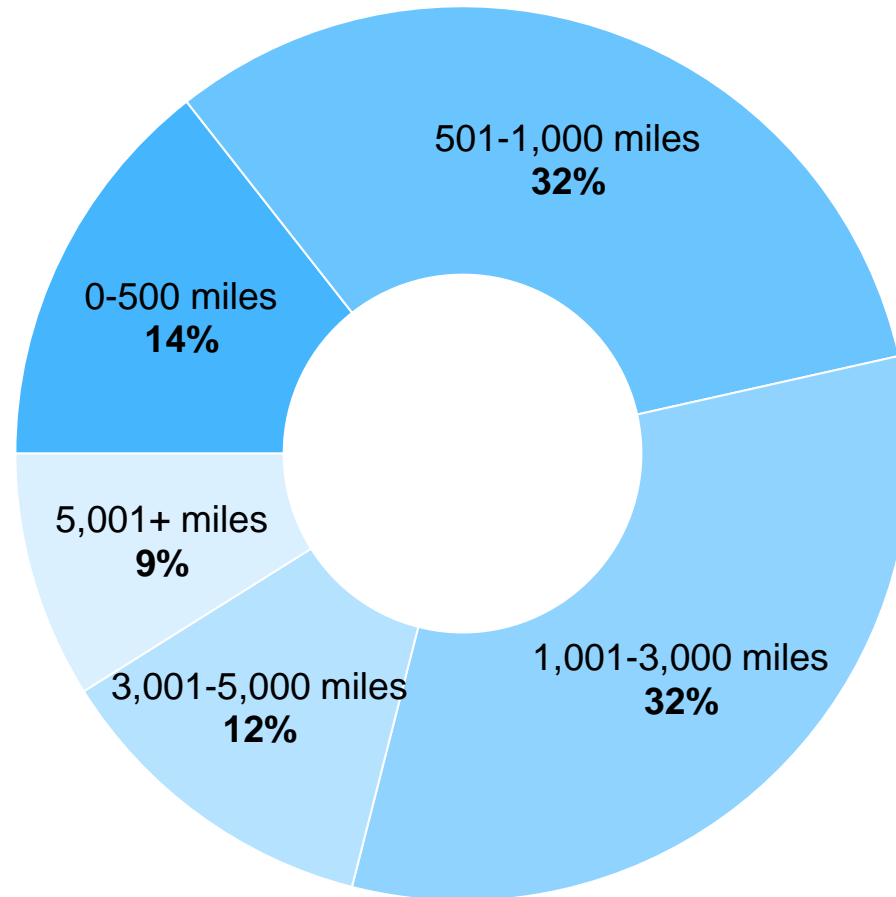


**\$144.29**

Ave. Per Person Per Day Spend

# U.S. Long-Distance Travelers: Annual Vacation

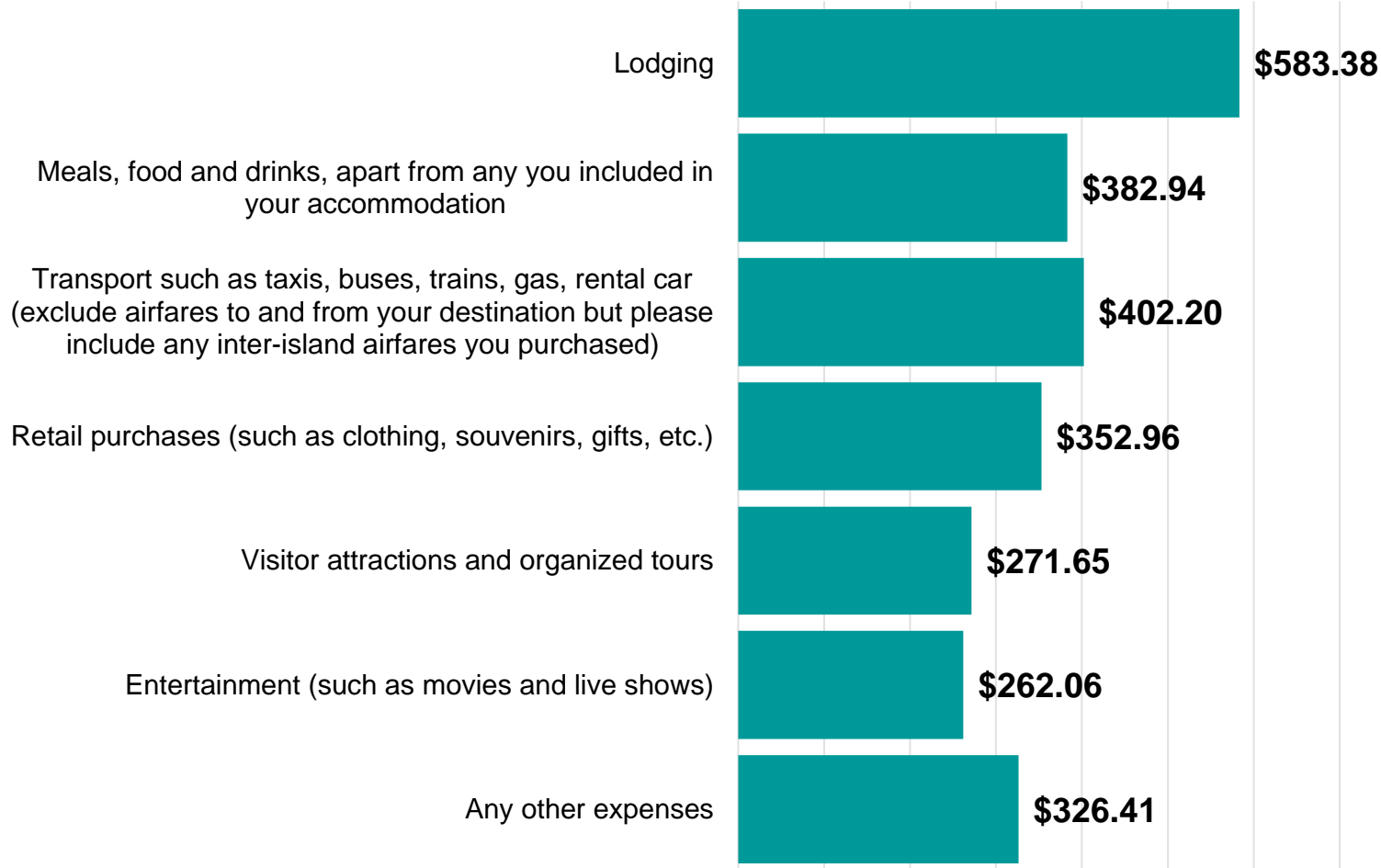
## Distance Travelled on Annual Vacation



Sample Size: n=410

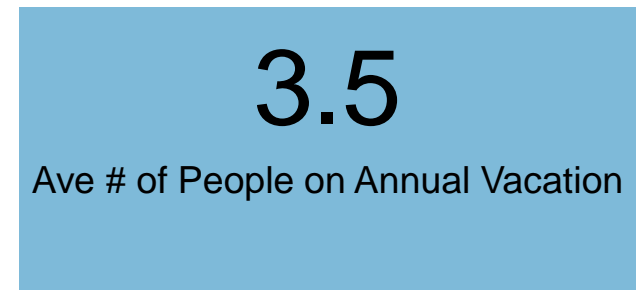
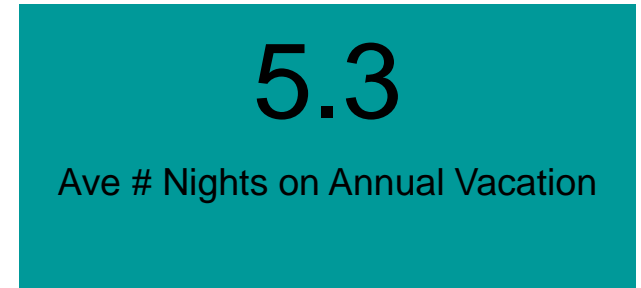
# U.S. Long-Distance Travelers: Annual Vacation

## Average Spend



Sample Size: n=410

## Spend Per Person Per Day

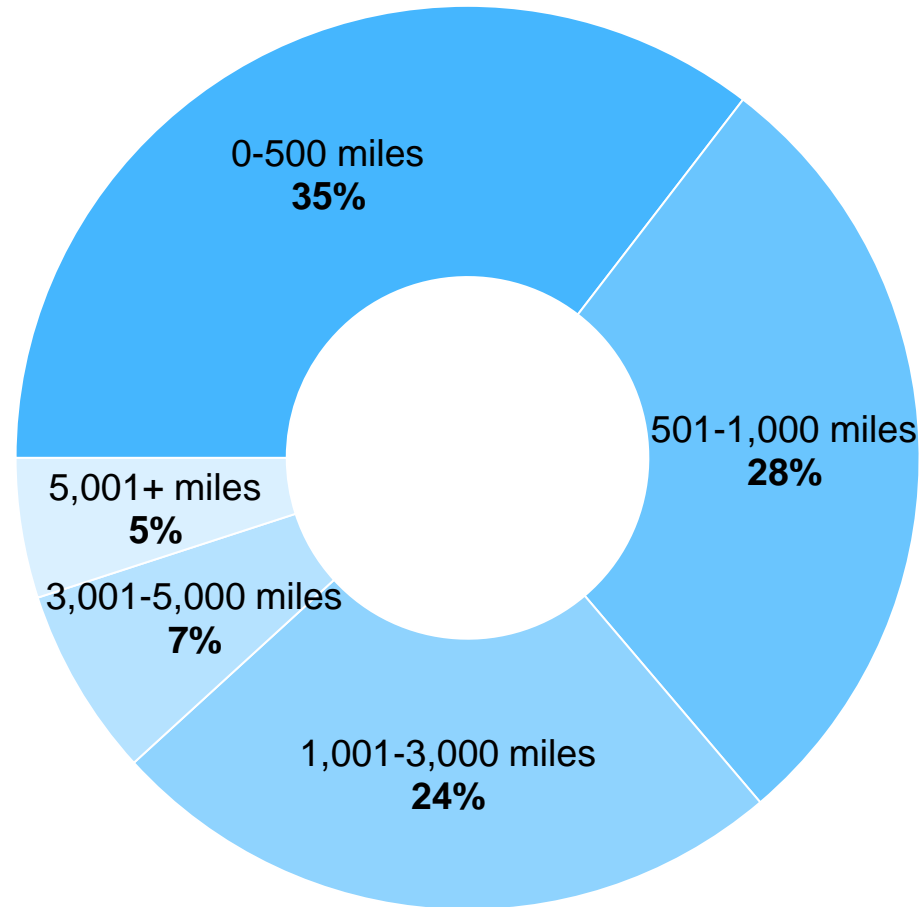


**\$140.92**

Ave. Per Person Per Day Spend

# U.S. Nat Rep: Annual Vacation

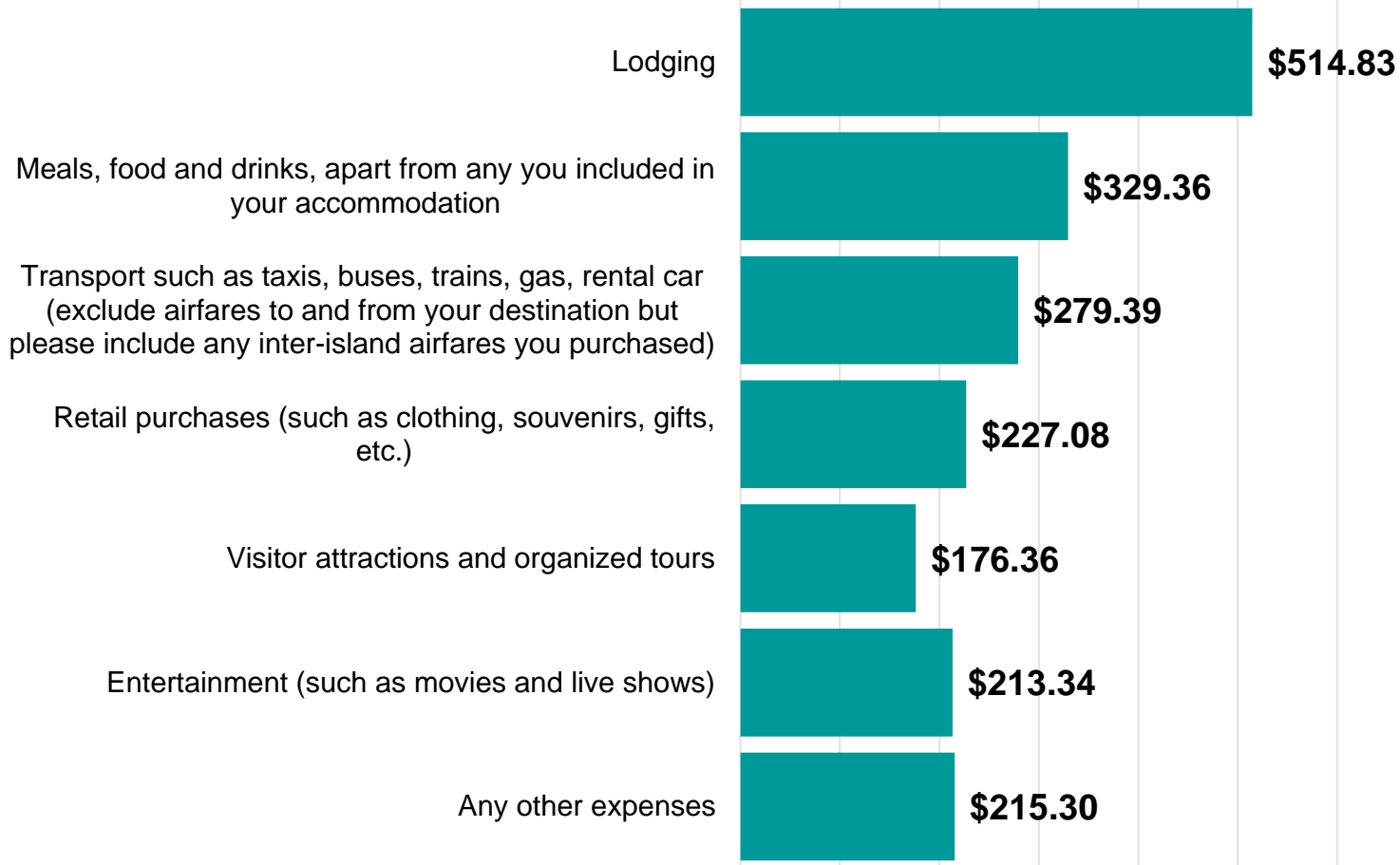
## Distance Travelled on Annual Vacation



Sample Size: n=1,874

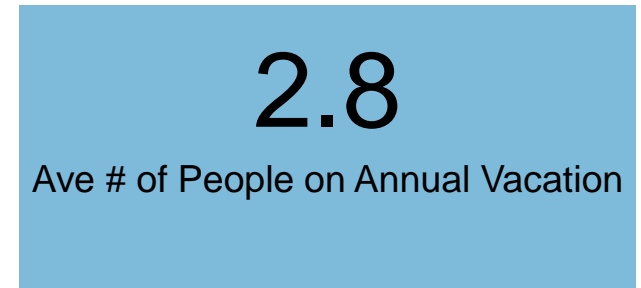
# U.S. Nat Rep: Annual Vacation

## Average Spend



Sample Size: n=1,874

## Spend Per Person Per Day



**\$135.47**

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	53%	60%	45%	51%
Value for money	54%	56%	46%	54%
Entertainment and nightlife	49%	54%	37%	31%
Consideration of sustainable principles	41%	34%	34%	28%
Natural attractions/activities	47%	50%	45%	44%
Cultural attractions	45%	44%	41%	37%
Opportunity to experience local restaurants/businesses	42%	38%	41%	41%
Family-friendly location and activities	49%	50%	42%	41%
Safe and Secure Destination	53%	49%	49%	59%

Sample Size:

n=132

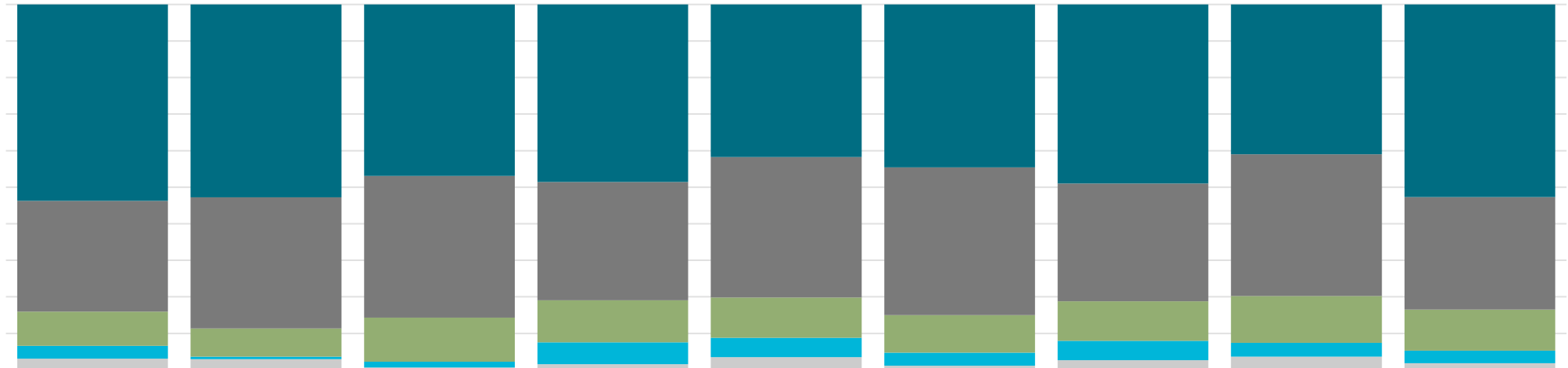
n=51

n=410

n=1,874



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

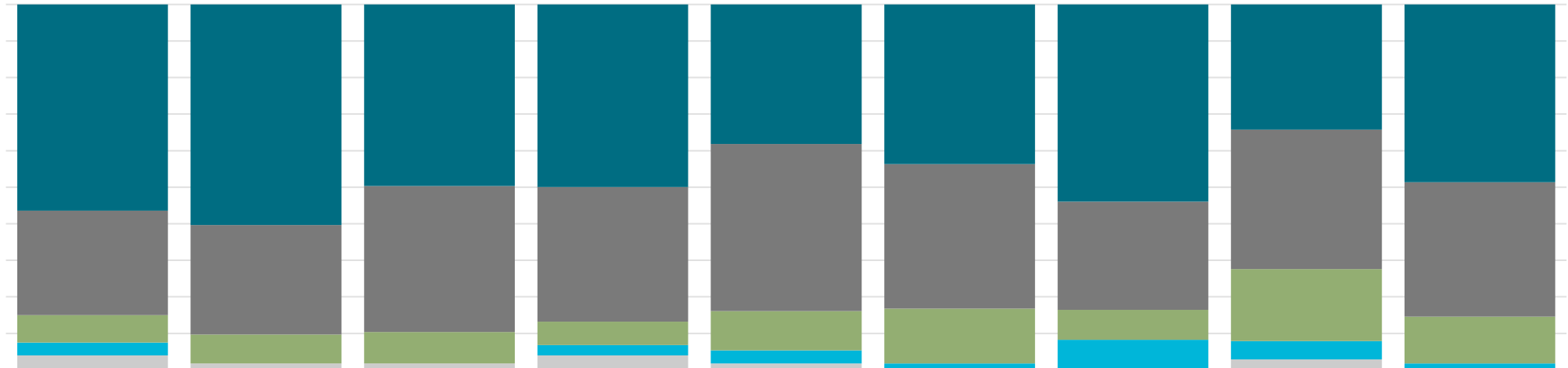


	Value for money	Comfort and accessibility	Natural attractions/activities	Family friendly locations and activities	Opportunity to experience local restaurants/businesses	Cultural attractions	Entertainment and nightlife	Consideration of sustainable principles	Safe and secure destination
Very Important 5	54%	53%	47%	49%	42%	45%	49%	41%	53%
4	30%	36%	39%	32%	38%	40%	32%	39%	31%
3	9%	8%	12%	12%	11%	10%	11%	13%	11%
2	3%	1%	2%	6%	5%	4%	5%	4%	3%
Not very Important 1	3%	3%	1%	2%	3%	1%	3%	4%	2%

Not very Important 1
  2
  3
  4
  Very Important 5

Sample Size: n=132

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

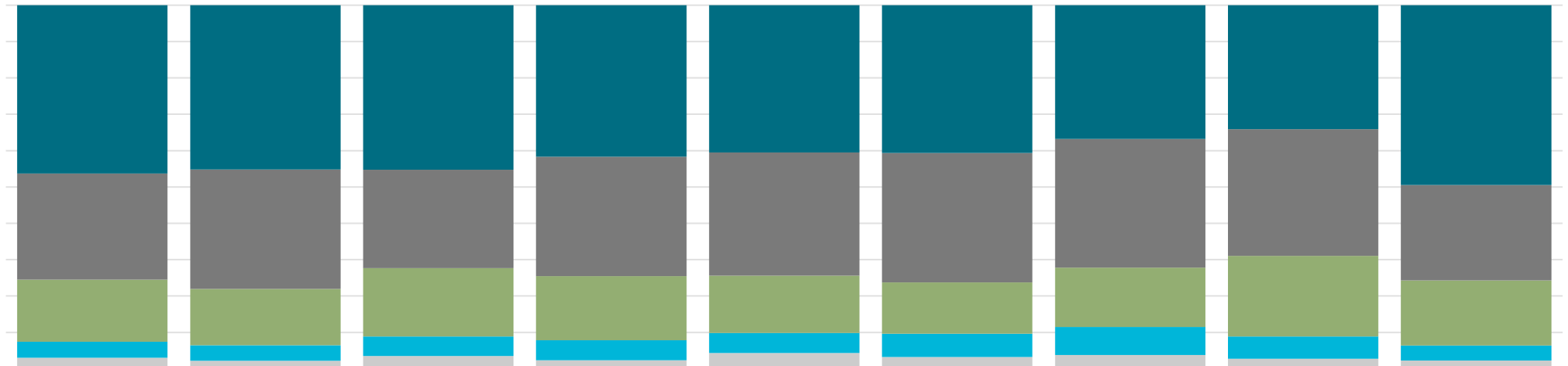


	Value for money	Comfort and accessibility	Natural attractions/activities	Family friendly locations and activities	Opportunity to experience local restaurants/businesses	Cultural attractions	Entertainment and nightlife	Consideration of sustainable principles	Safe and secure destination
Very Important 5	56%	60%	50%	50%	38%	44%	54%	34%	49%
4	29%	30%	40%	37%	46%	40%	30%	38%	37%
3	8%	8%	9%	6%	11%	15%	8%	20%	13%
2	4%	0%	0%	3%	4%	2%	8%	5%	2%
Not very Important 1	4%	2%	2%	4%	2%	0%	0%	3%	0%

Not very Important 1
  2
  3
  4
  Very Important 5

Sample Size: n=51

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

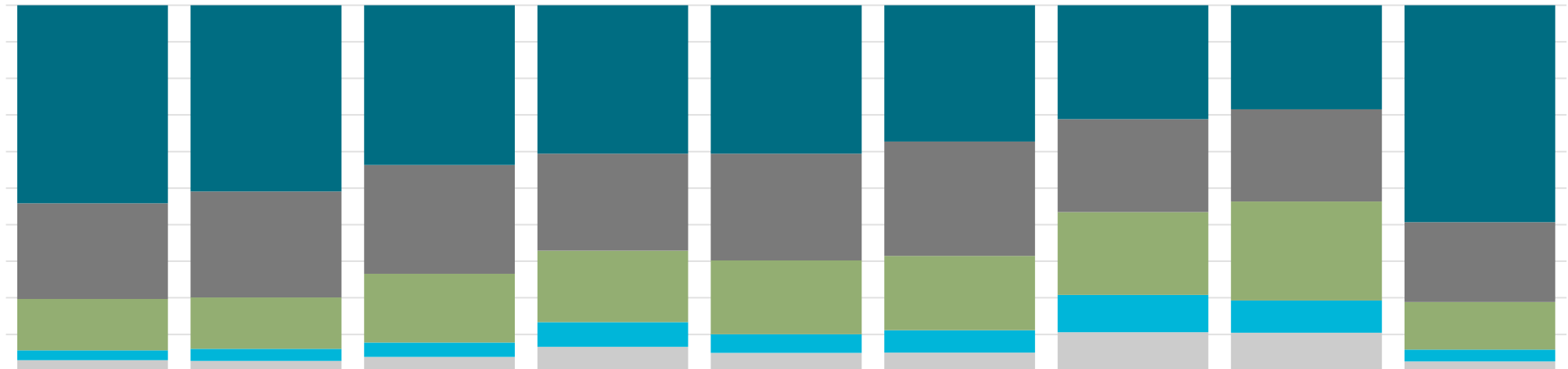


	Value for money	Comfort and accessibility	Natural attractions/activities	Family friendly locations and activities	Opportunity to experience local restaurants/businesses	Cultural attractions	Entertainment and nightlife	Consideration of sustainable principles	Safe and secure destination
Very Important 5	46%	45%	45%	42%	41%	41%	37%	34%	49%
4	29%	33%	27%	33%	34%	36%	35%	35%	26%
3	17%	15%	19%	18%	16%	14%	16%	22%	18%
2	4%	4%	5%	5%	6%	6%	8%	6%	4%
Not very Important 1	3%	2%	4%	2%	4%	3%	4%	3%	2%

Not very Important 1
  2
  3
  4
  Very Important 5

Sample Size: n=410

# U.S. Nat Rep: Importance of Travel Factors



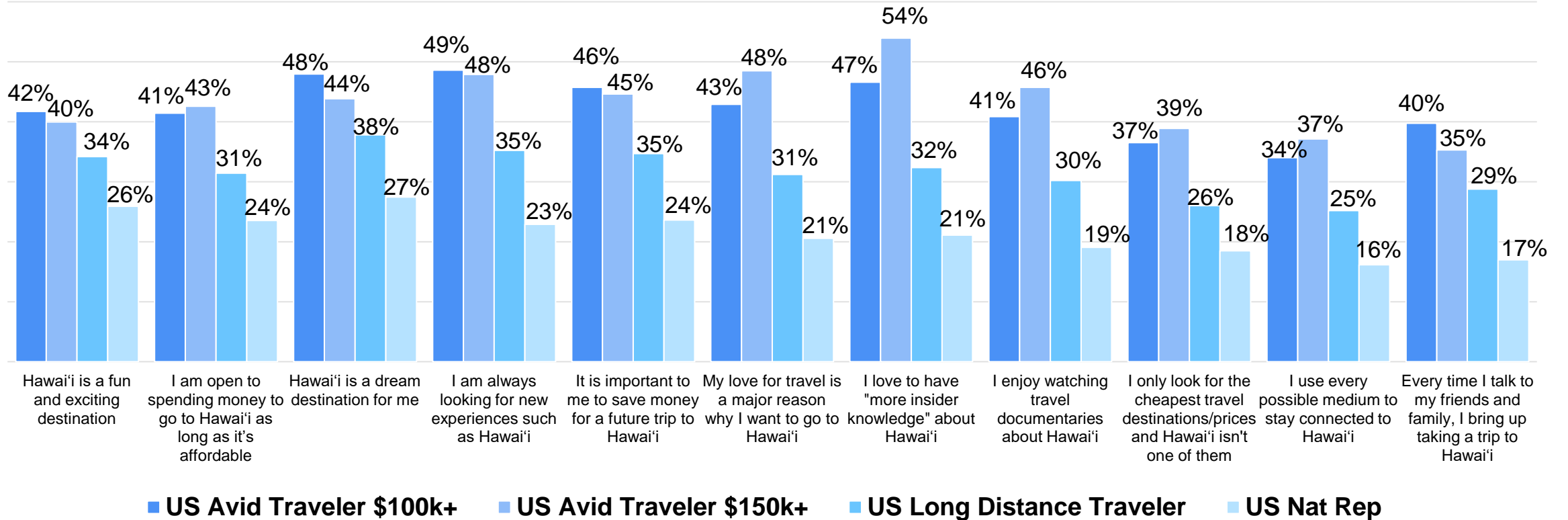
	Value for money	Comfort and accessibility	Natural attractions/activities	Family friendly locations and activities	Opportunity to experience local restaurants/businesses	Cultural attractions	Entertainment and nightlife	Consideration of sustainable principles	Safe and secure destination
Very Important 5	54%	51%	44%	41%	41%	37%	31%	28%	59%
4	26%	29%	30%	26%	29%	31%	25%	25%	22%
3	14%	14%	19%	20%	20%	20%	23%	27%	13%
2	3%	3%	4%	7%	5%	6%	10%	9%	3%
Not very Important 1	3%	3%	4%	7%	5%	5%	11%	10%	3%

Not very Important 1
  2
  3
  4
  Very Important 5

Sample Size: n=1,874

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

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



Sample Size:

n=132

n=51

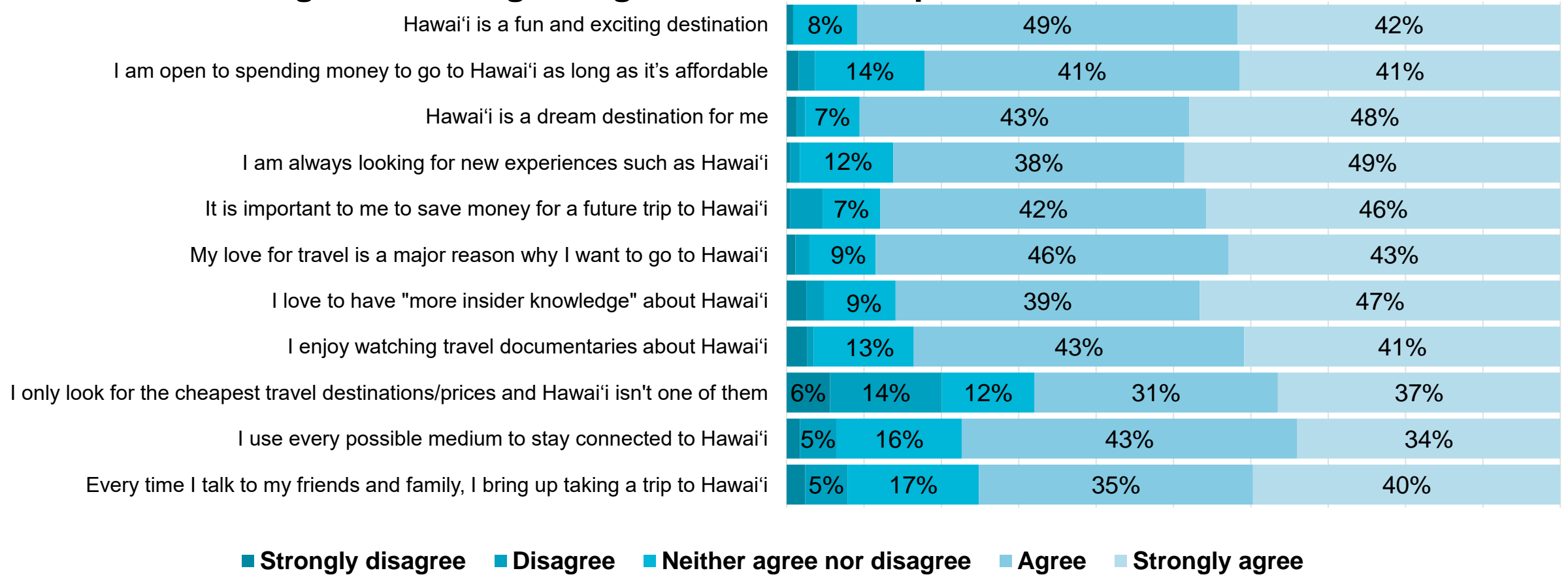
N=410

n=1,874

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

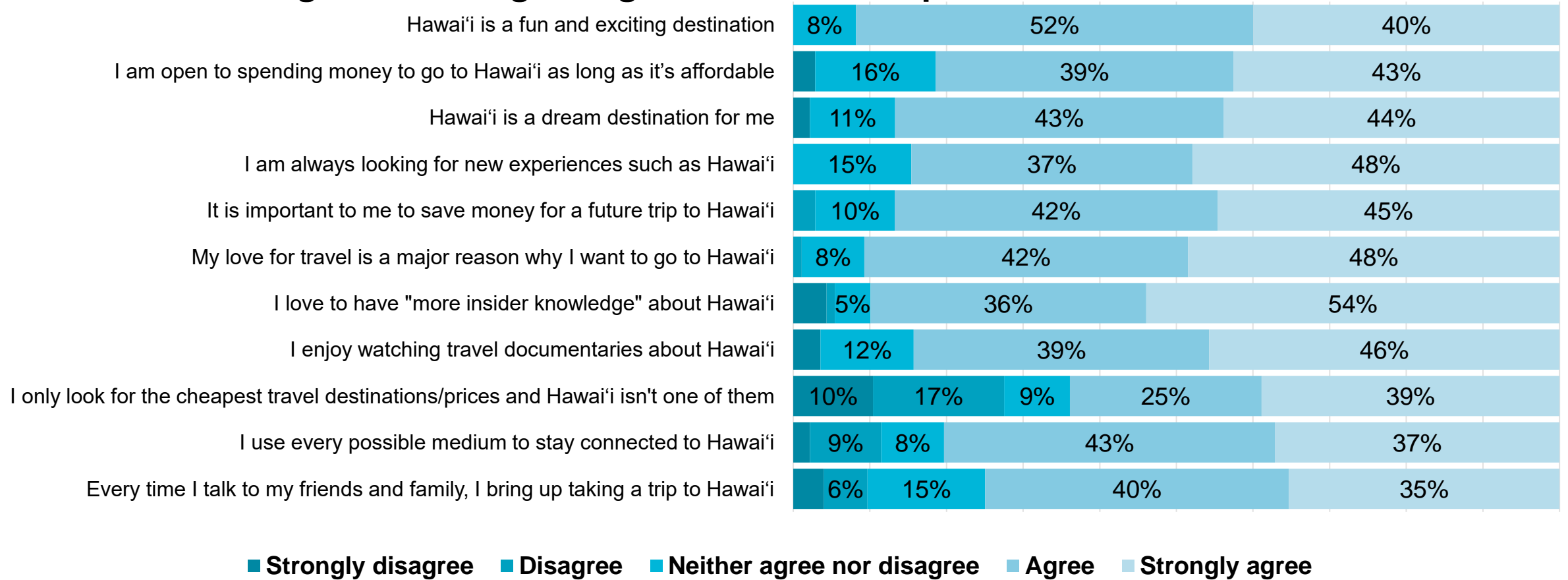
## Agreement Regarding Hawai'i as an Aspirational Destination



Sample Size: n=132

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

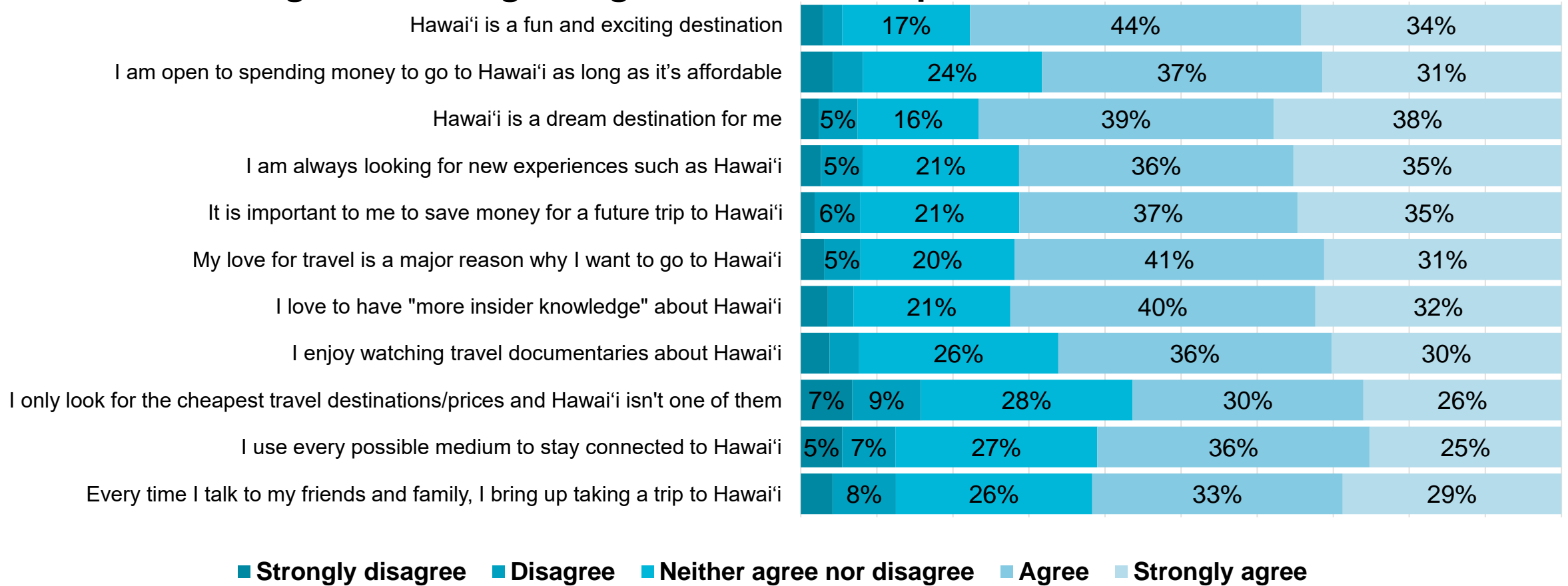
## Agreement Regarding Hawai'i as an Aspirational Destination



Sample Size: n=51

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

## Agreement Regarding Hawai'i as an Aspirational Destination

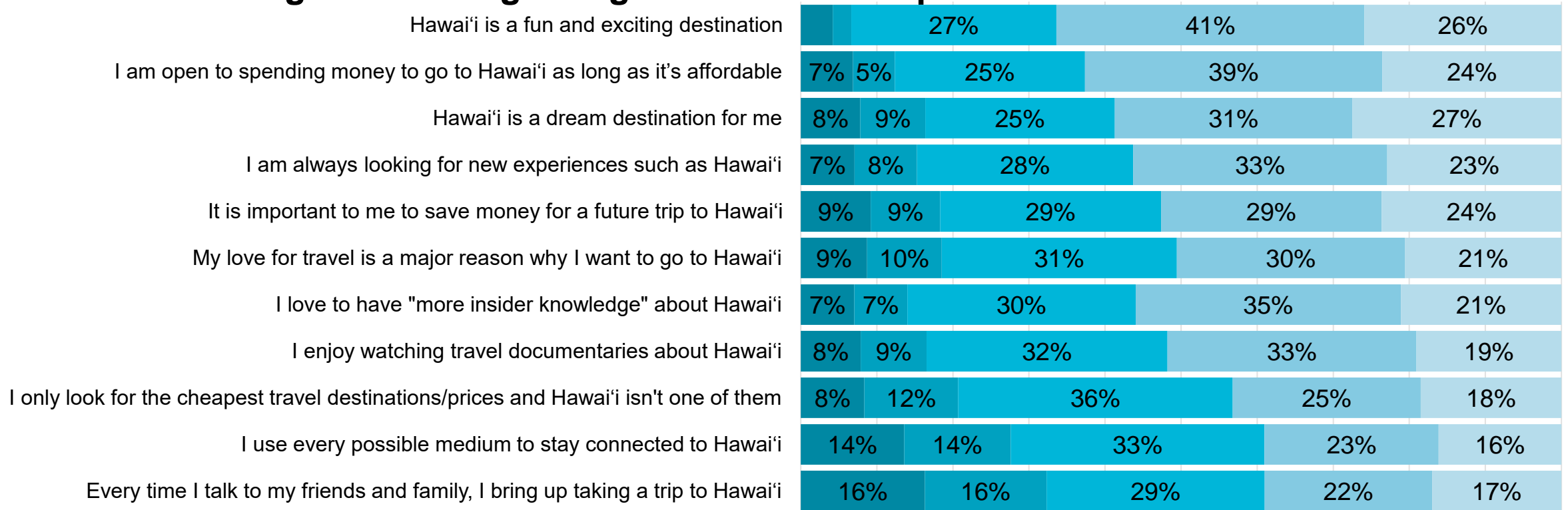


Sample Size: n=410



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

## Agreement Regarding Hawai'i as an Aspirational Destination

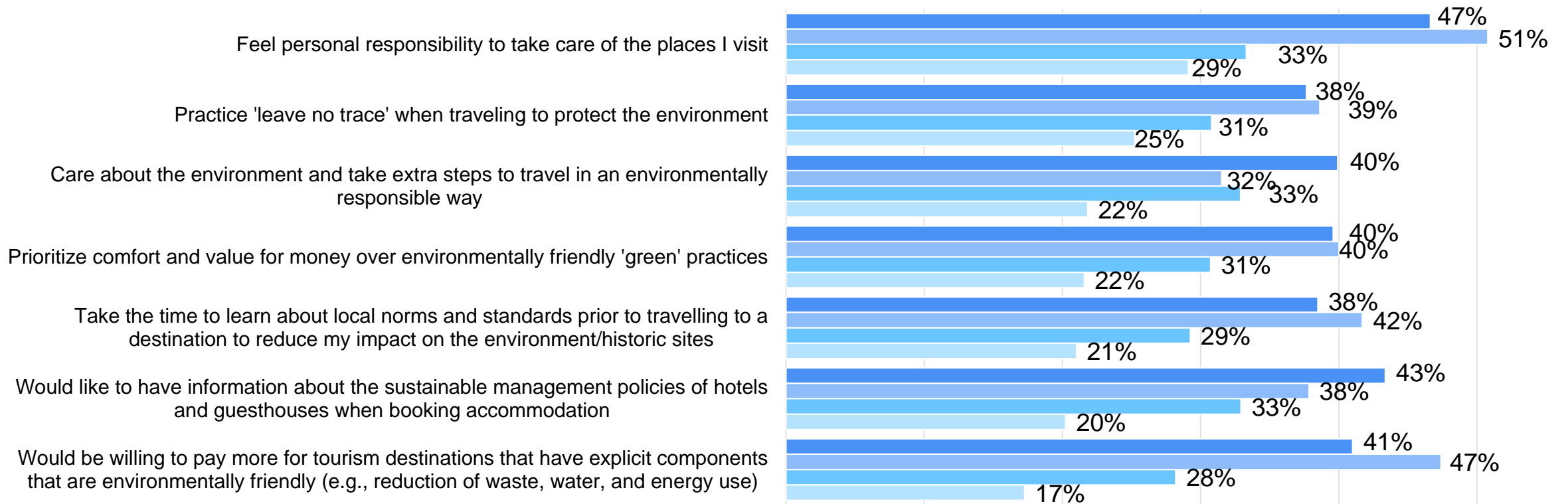


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=1,874

# 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=132

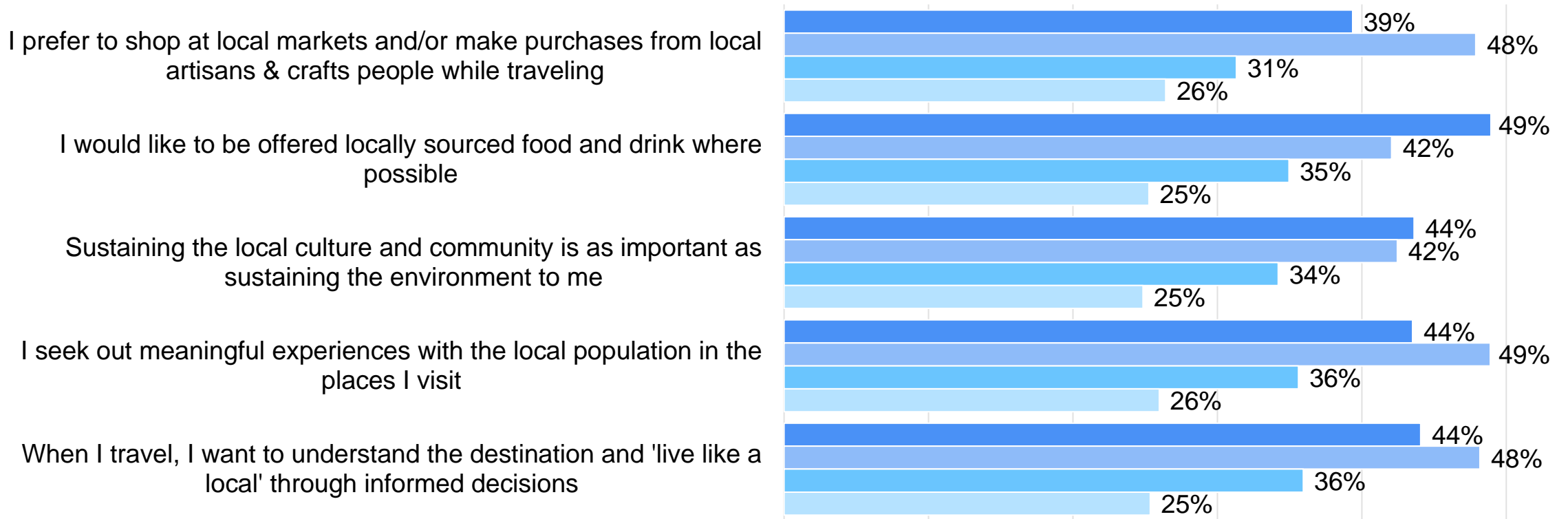
n=51

n=410

n=1,874

# 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=132

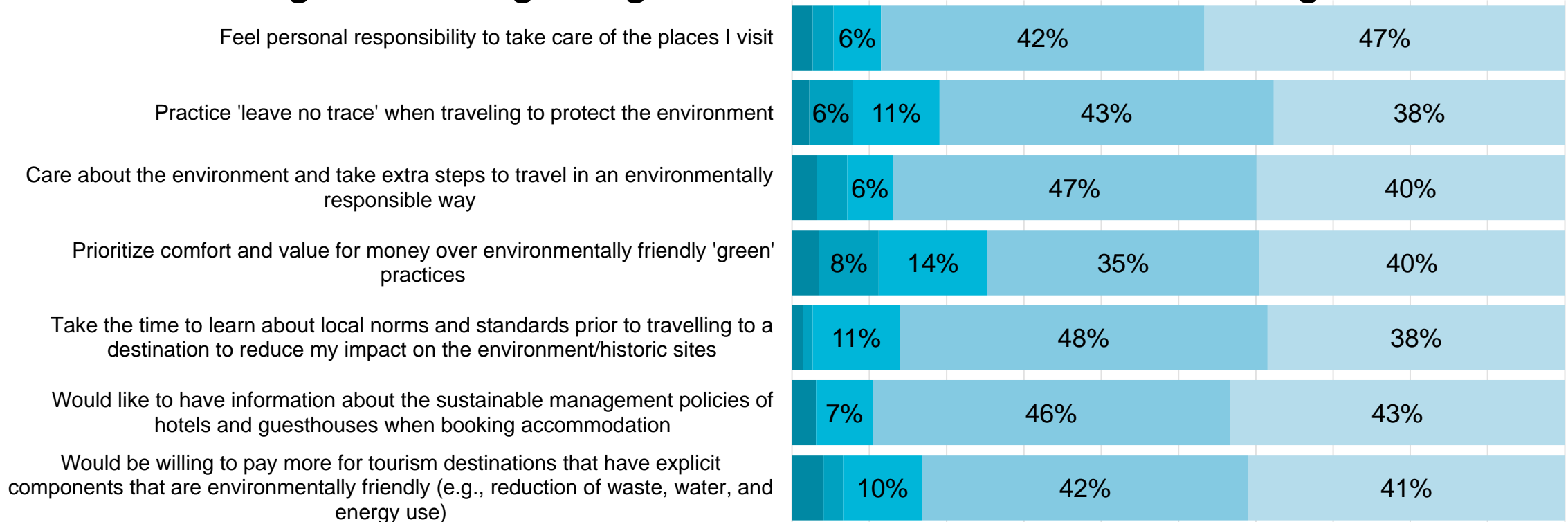
n=51

n=410

n=1,874

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

## Agreement Regarding Sustainable Practices While Traveling

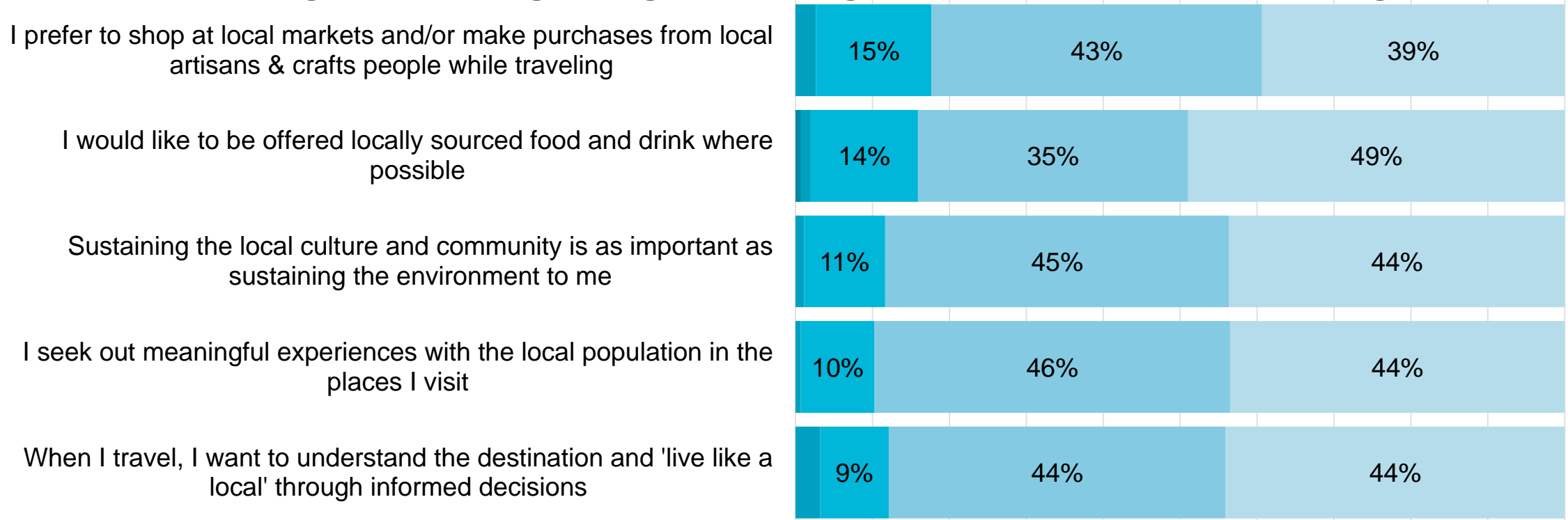


■ Strongly disagree  
 ■ Disagree  
 ■ Neither agree nor disagree  
 ■ Agree  
 ■ Strongly agree

Sample Size: n=132

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

## Agreement Regarding Sustaining Local Culture While Traveling

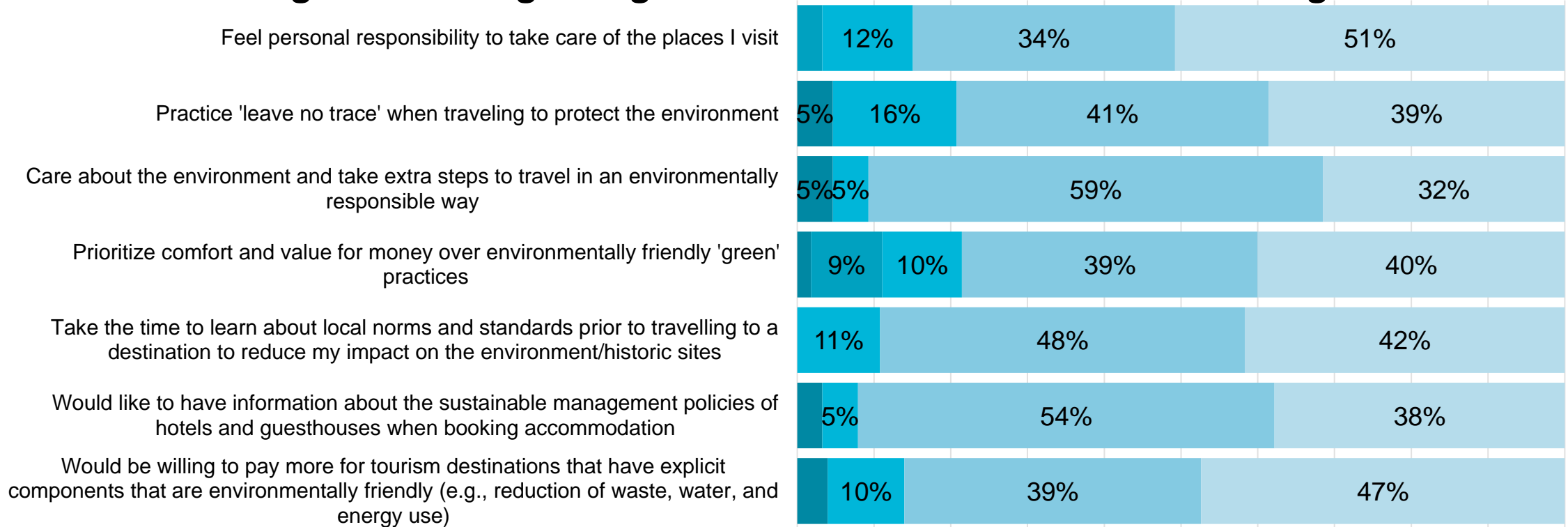


■ Strongly disagree 
 ■ Disagree 
 ■ Neither agree nor disagree 
 ■ Agree 
 ■ Strongly agree

Sample Size: n=132

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

## Agreement Regarding Sustainable Practices While Traveling

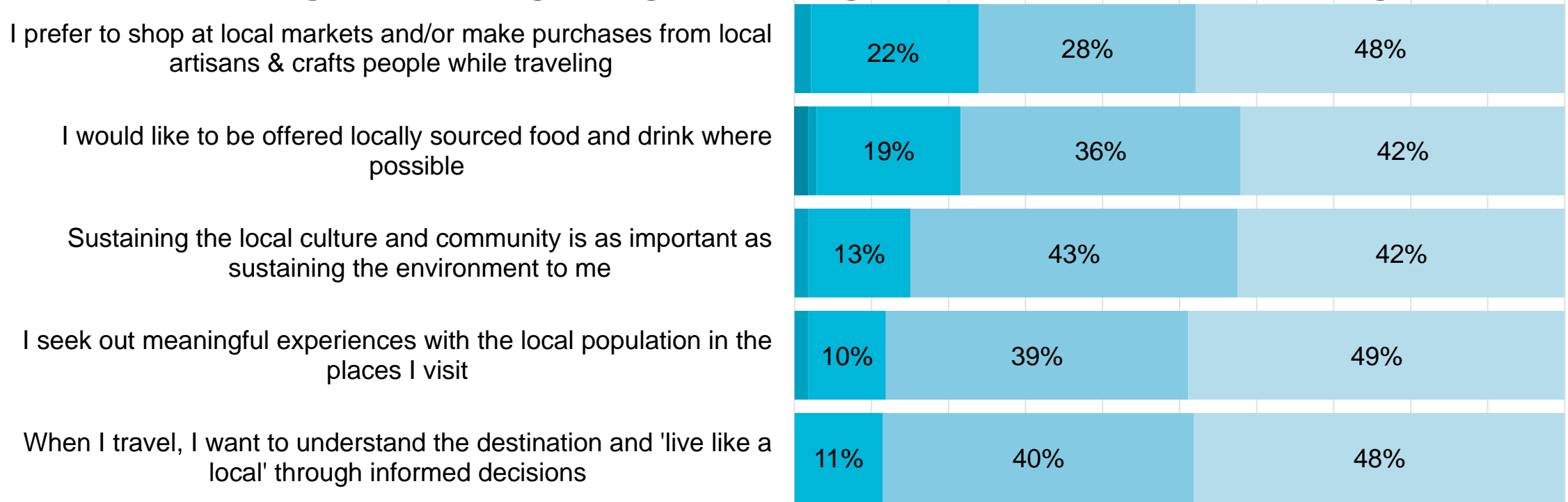


■ Strongly disagree 
 ■ Disagree 
 ■ Neither agree nor disagree 
 ■ Agree 
 ■ Strongly agree

Sample Size: n=51

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

## Agreement Regarding Sustaining Local Culture While Traveling

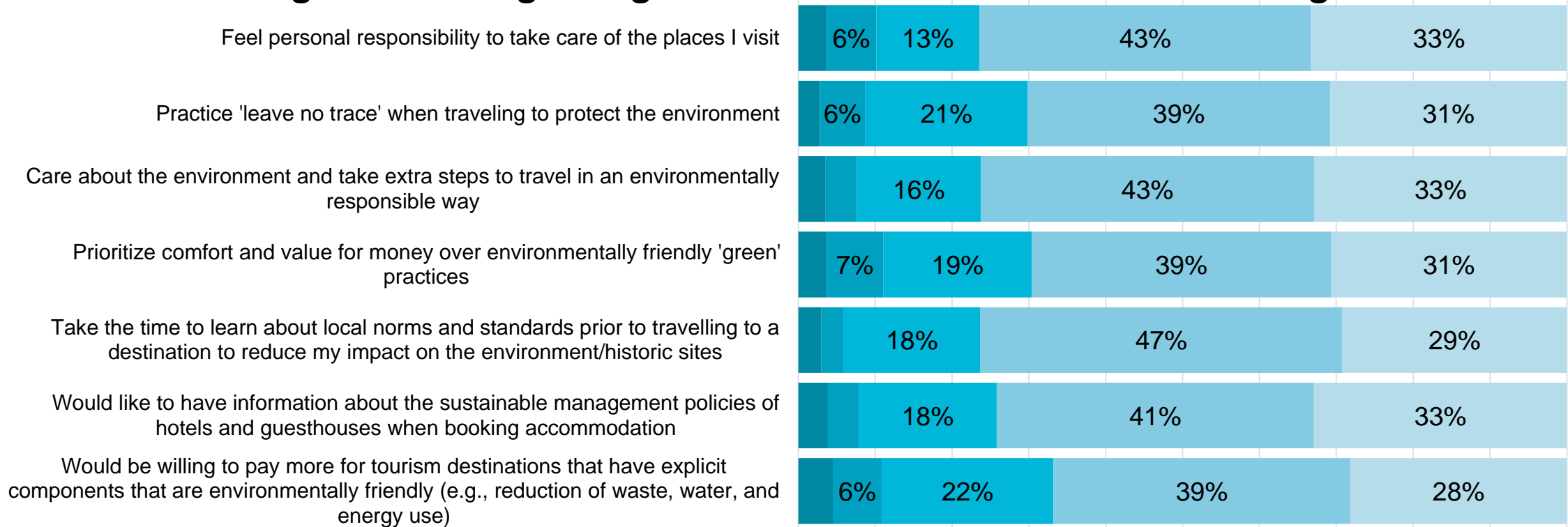


■ Strongly disagree 
 ■ Disagree 
 ■ Neither agree nor disagree 
 ■ Agree 
 ■ Strongly agree

Sample Size: n=51

# 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=410



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

## Agreement Regarding Sustaining Local Culture While Traveling

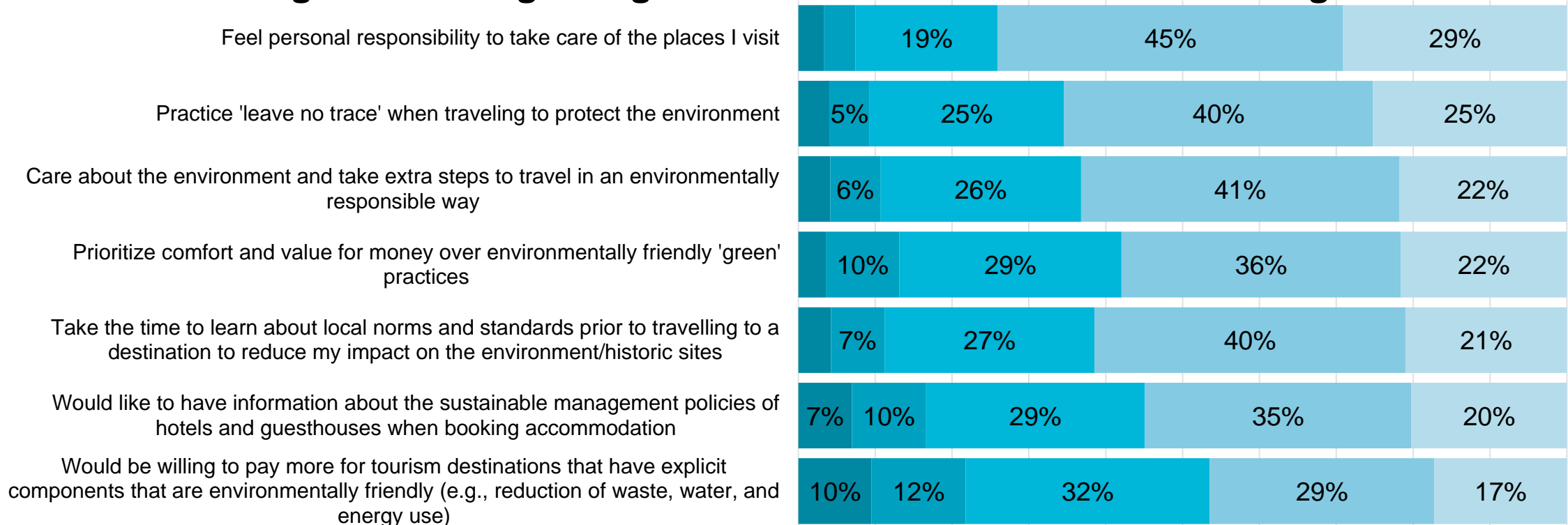


■ Strongly disagree 
 ■ Disagree 
 ■ Neither agree nor disagree 
 ■ Agree 
 ■ Strongly agree

Sample Size: n=410

# 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=1,874

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

## Agreement Regarding Sustaining Local Culture While Traveling

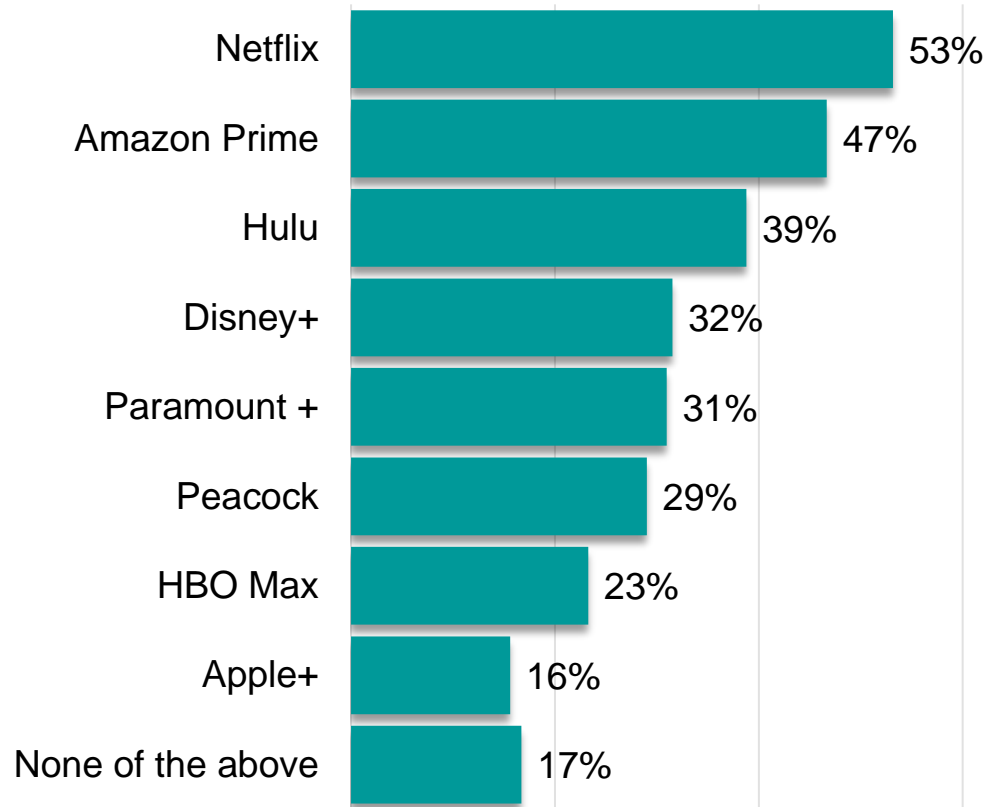


■ Strongly disagree 
 ■ Disagree 
 ■ Neither agree nor disagree 
 ■ Agree 
 ■ Strongly agree

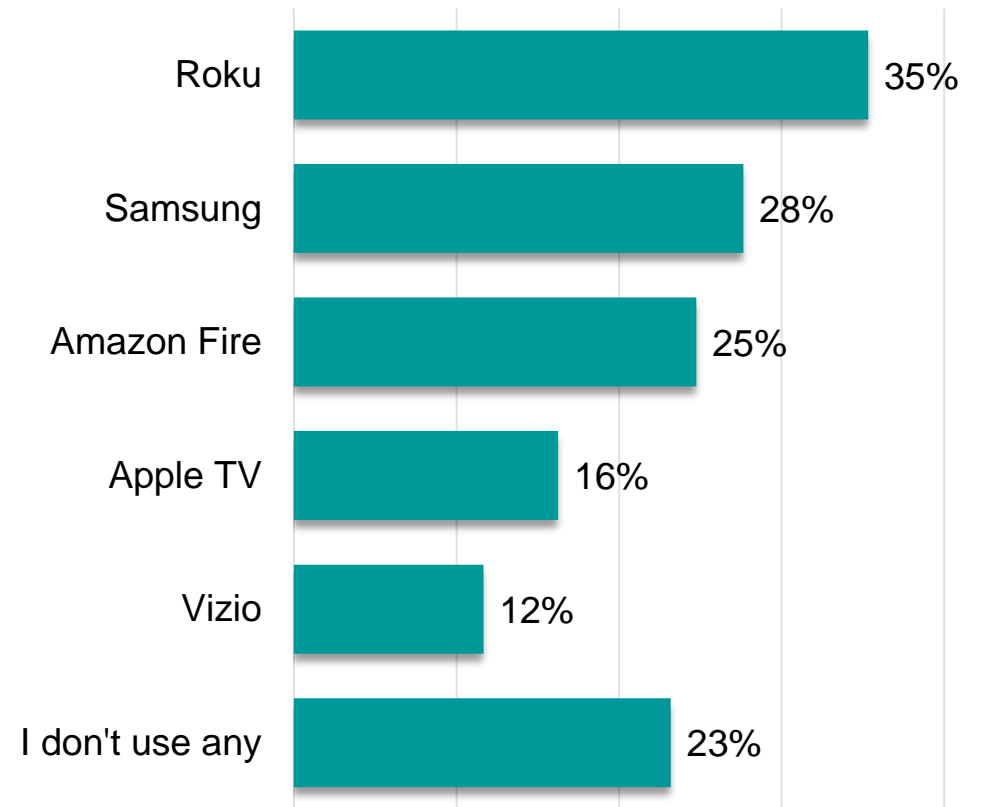
Sample Size: n=1,874

# U.S. Media Consumption

## Streaming Platforms Used Weekly



## Connected Device Used

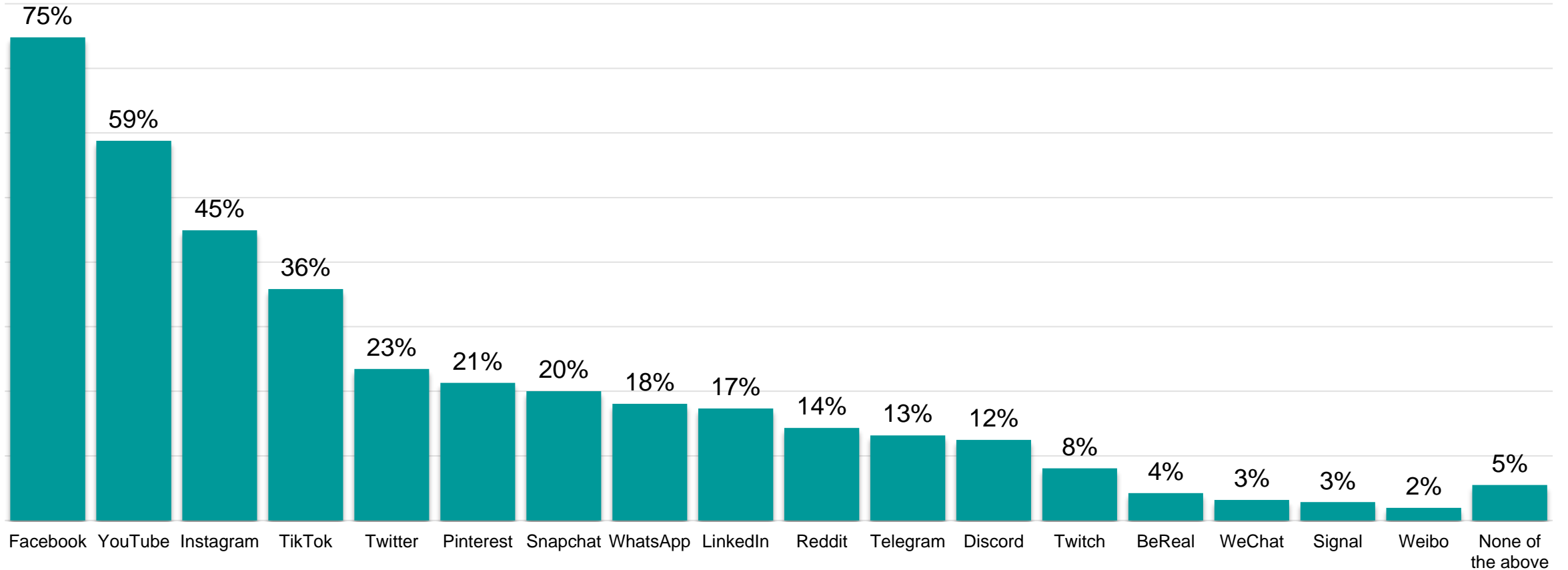


Sample Size: n=1,874

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=1,874

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	42%
Online	31%
Social Media	37%
TV commercials	30%
YouTube	36%
TV Program/Documentary	20%
Email	17%
Radio	9%
Newspaper	12%
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	42%
I talk to friends/family about the destination	34%
I go to the destination's website	32%
I look up the destination on social media	24%
I book travel to the destination almost immediately	14%
I don't do anything	17%
None of the above	9%

Sample Size: n=1,874