



Vision Insights U.S. Traveler Profiles December 2024

January 24, 2025



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
 - Visited Hawai'i or Alaska in the last 12 months
 - Next leisure destination is most likely to be 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
- Age 18-54

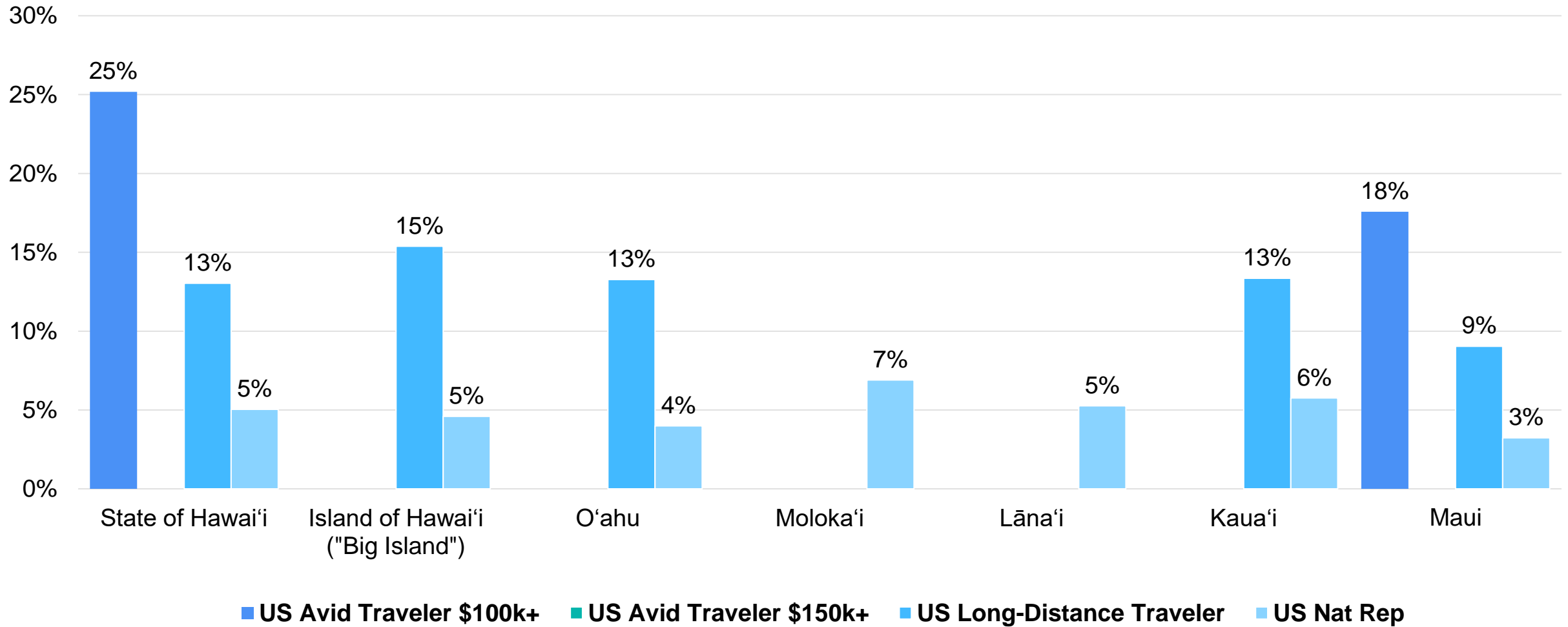
Avid Traveler \$150k+

- Gross household income is \$150k+
- Age is 25-54
- Either
 - Married/domestic partner and have no children
 - Married/domestic partner and have 1+ children under 18
 - Have 1+ children under 18
- 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
 - Visited Hawai'i or Alaska in the last 12 months
 - Next leisure destination is most likely to be Hawai'i or Alaska

Nationally Representative Sample (Nat Rep)

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

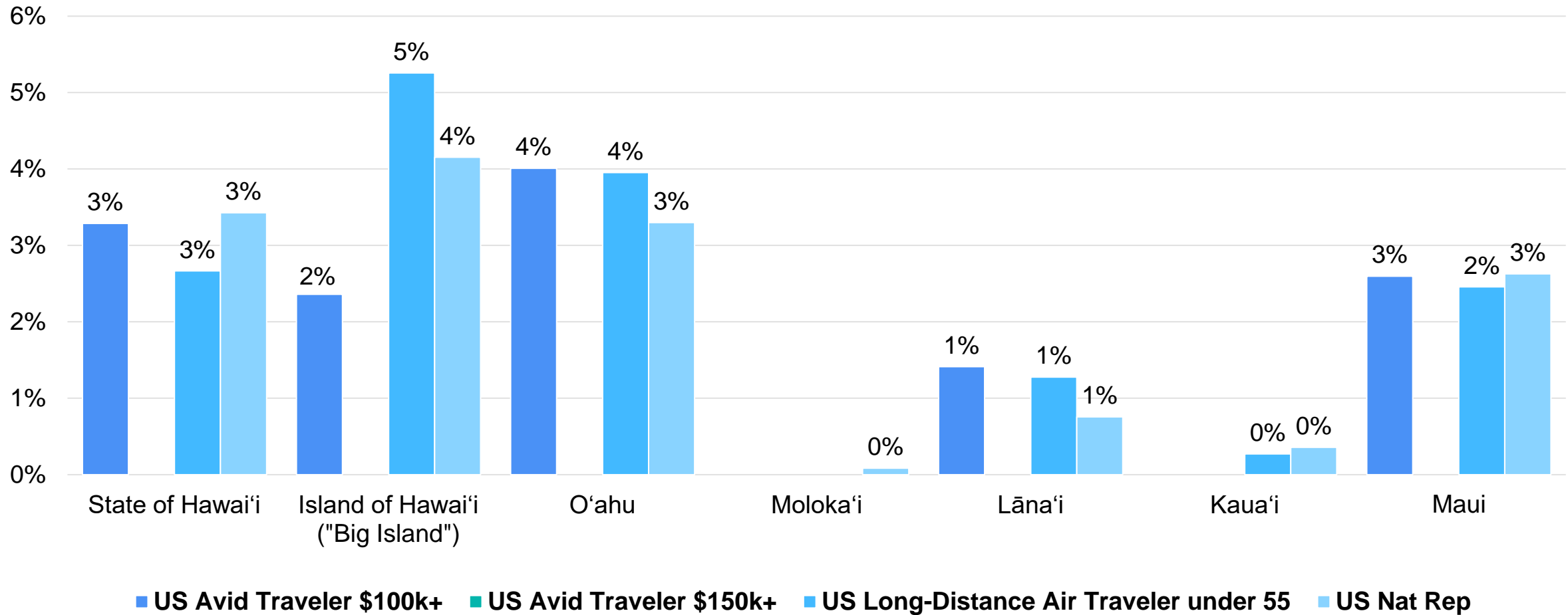
U.S. - Leisure Trip In Past 12 Months



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

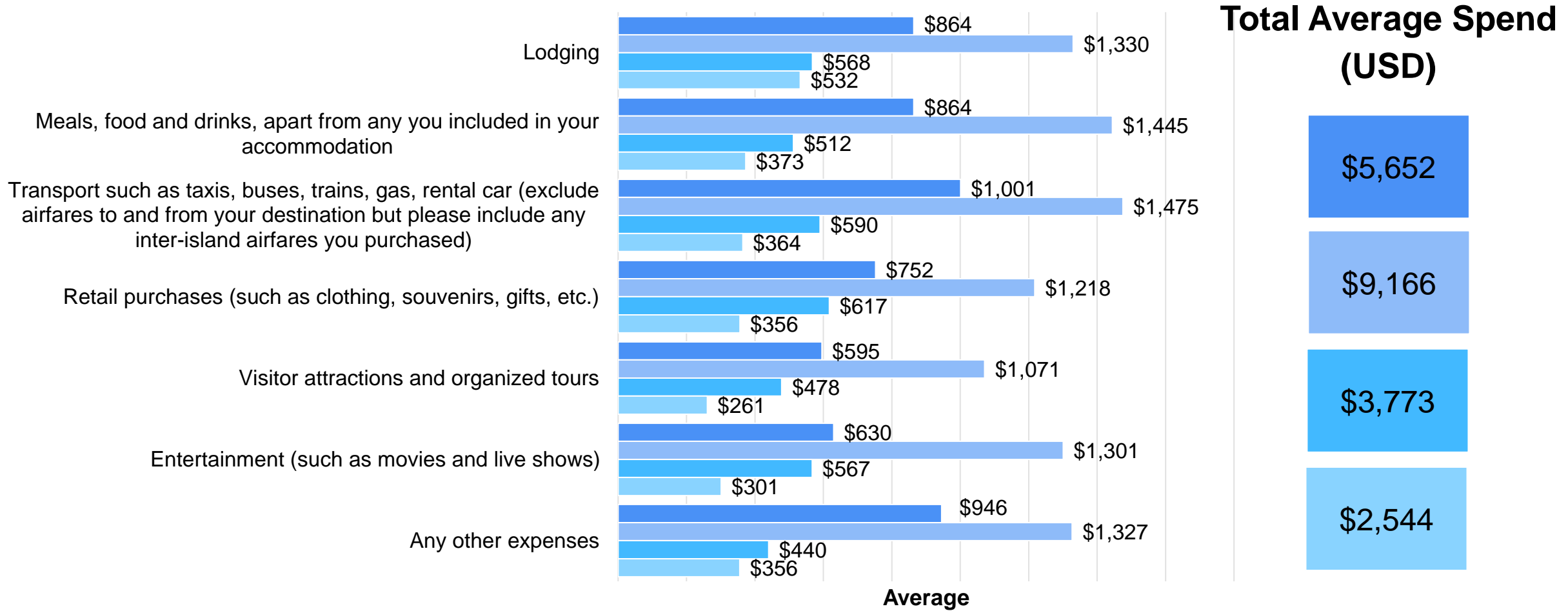


Sample Min. n=75

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	15.1%	Florida	9.6%	Texas	11.8%	Florida	9.6%
California	12.5%	Texas	7.7%	New York	10.8%	Texas	7.7%
Florida	10.5%	New York	7.0%	Florida	9.4%	New York	7.0%
Texas	10.0%	Pennsylvania	6.3%	Georgia	5.4%	Pennsylvania	6.3%
Georgia	6.3%	California	6.2%	Illinois	5.3%	California	6.2%
Illinois	5.4%	Illinois	4.4%	California	5.0%	Ohio	4.5%
Virginia	4.0%	Virginia	3.4%	Pennsylvania	3.8%	Illinois	4.4%
Pennsylvania	3.1%	New Jersey	2.3%	Virginia	3.3%	Georgia	4.4%
Washington	1.2%	Colorado	1.0%	Washington	0.1%	North Carolina	4.2%
Minnesota	0.0%	Washington	0.5%	Minnesota	0.0%	Virginia	3.4%
Sample Size:	n=150	Sample Size:	n=49	Sample Size:	n=395	Sample Size:	n=1,917

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=150

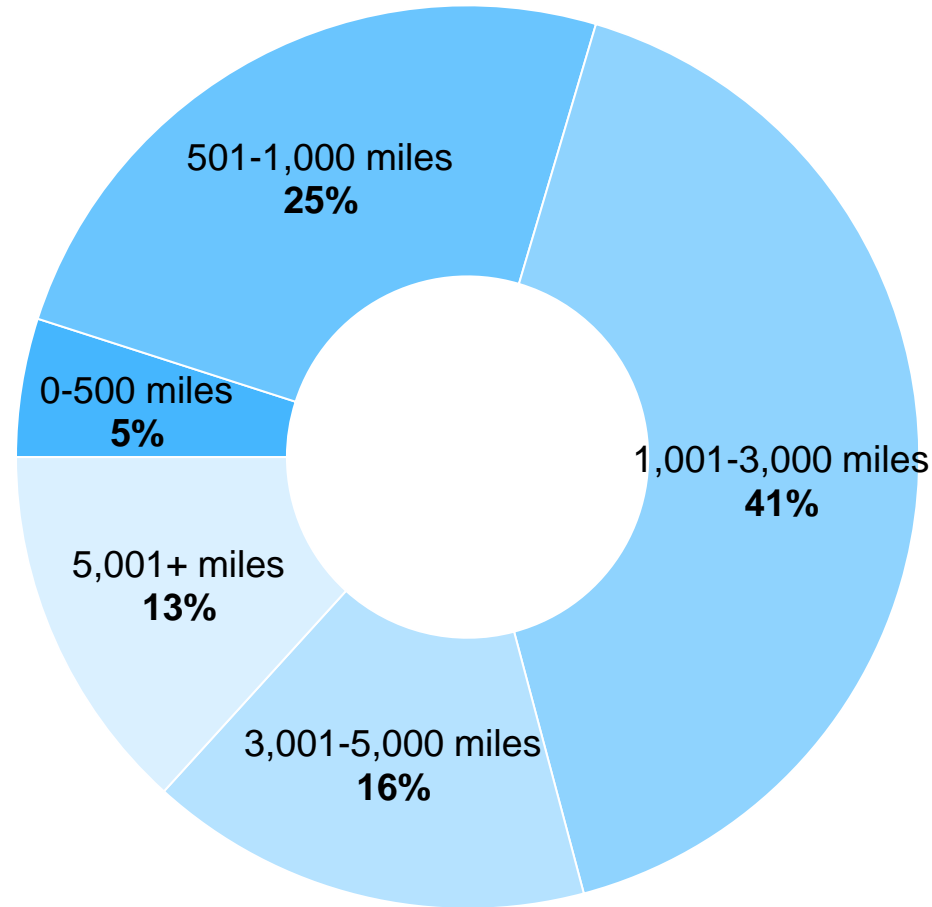
n=49

n=395

n=1,917

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

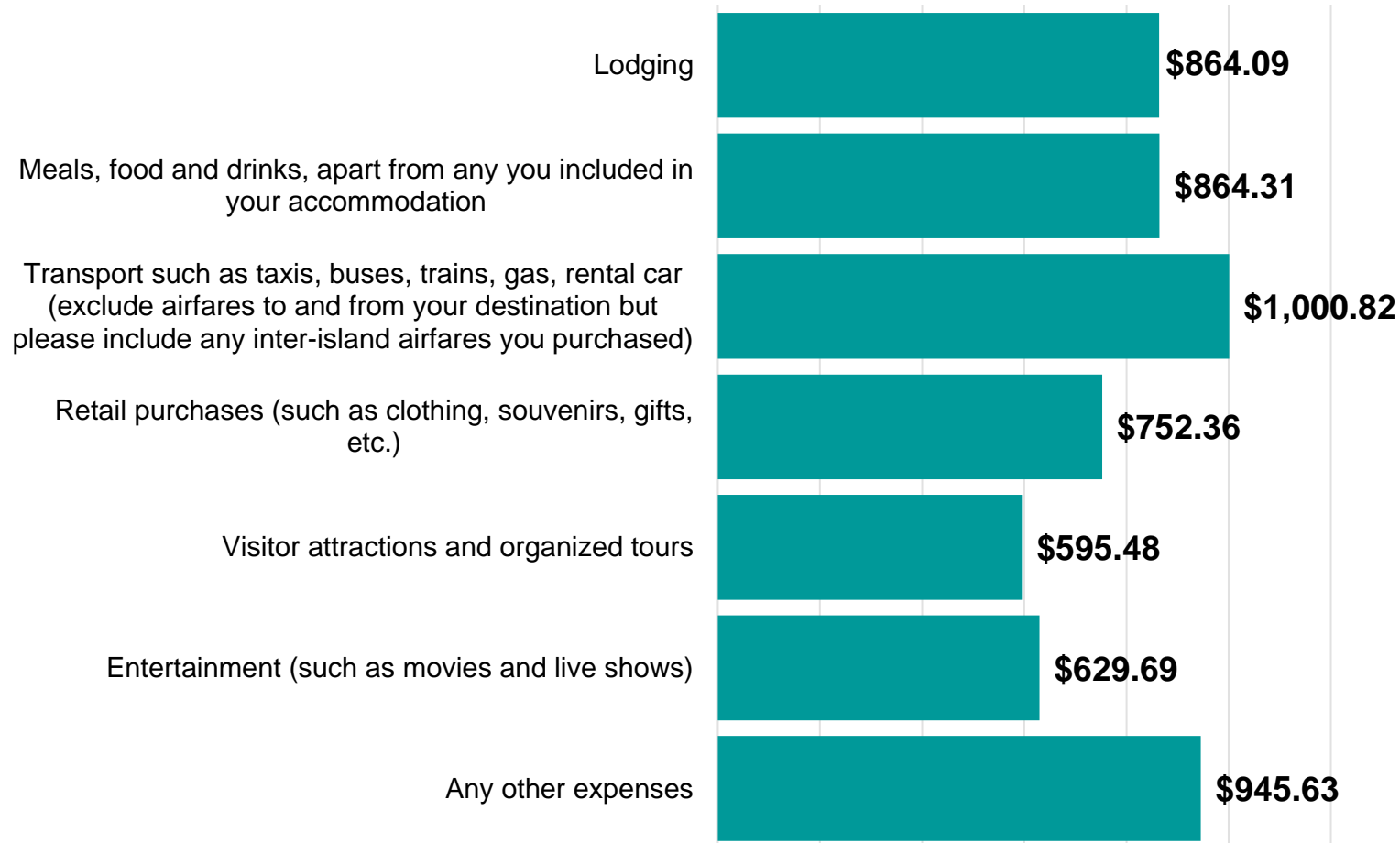
Distance Travelled on Annual Vacation



Sample Size: n=150

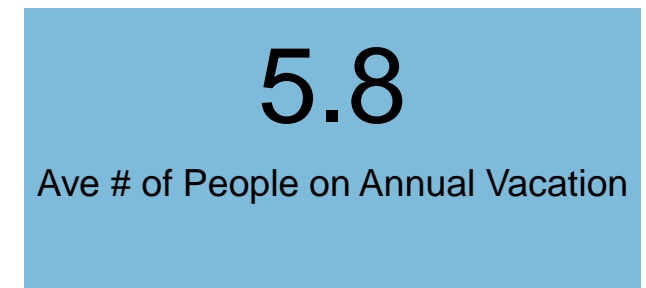
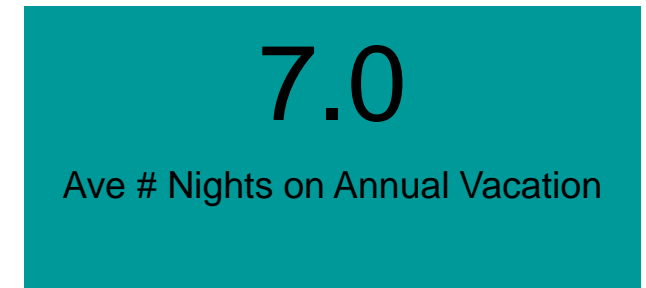
U.S. Avid Travelers \$100k+: Annual Vacation

Average Spend



Sample Size: n=150

Spend Per Person Per Day

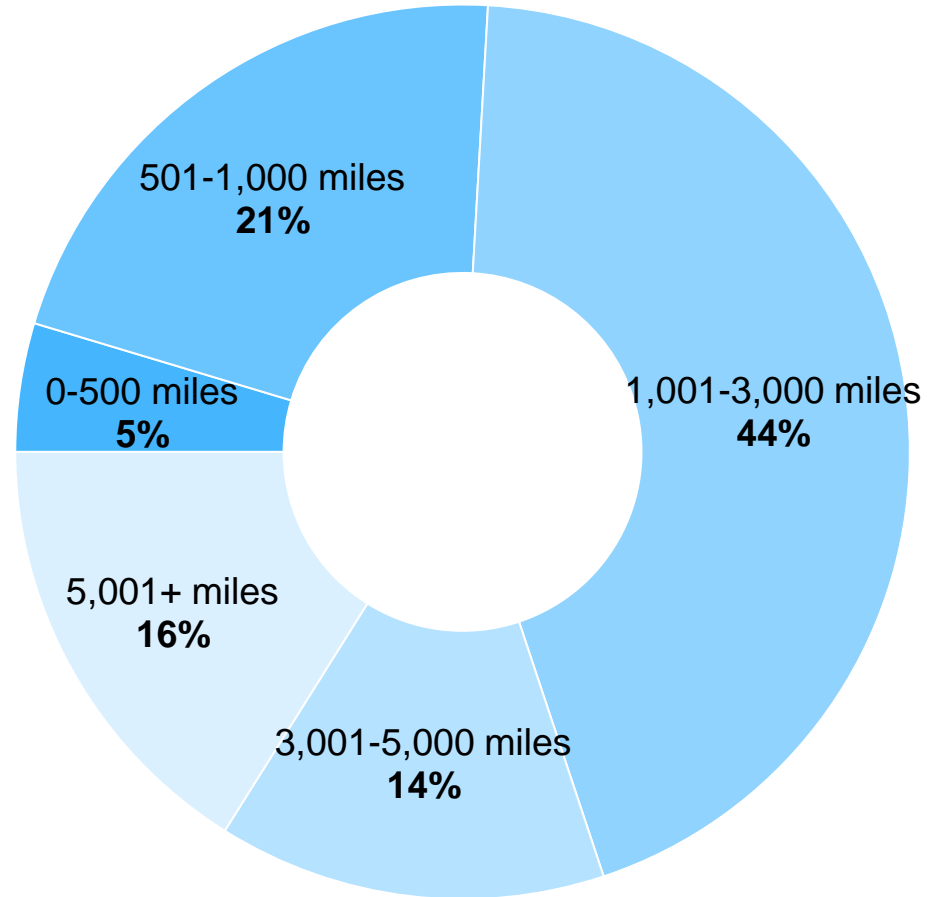


\$137.90

Ave. Per Person Per Day Spend

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

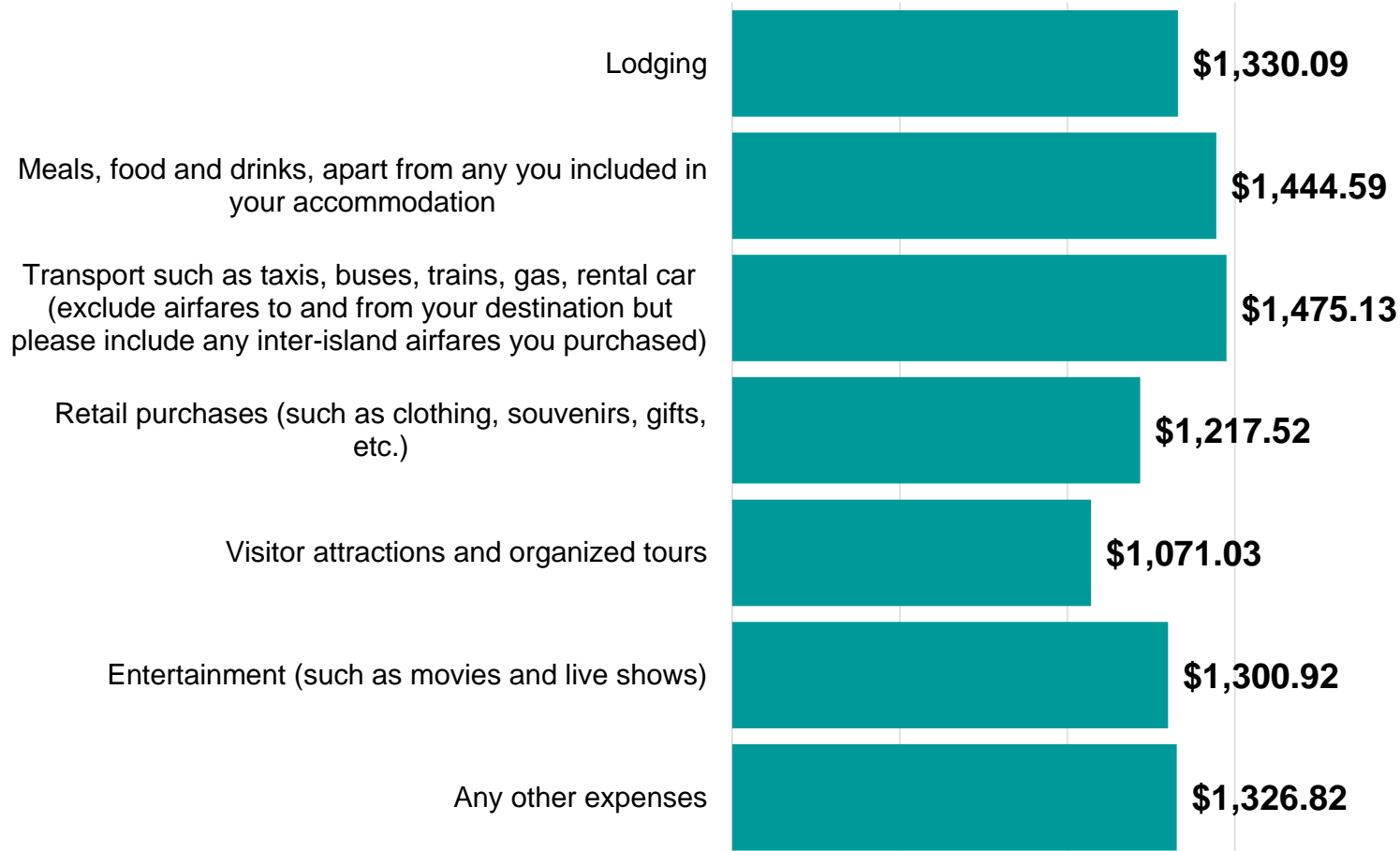
Distance Travelled on Annual Vacation



Sample Size: n=49

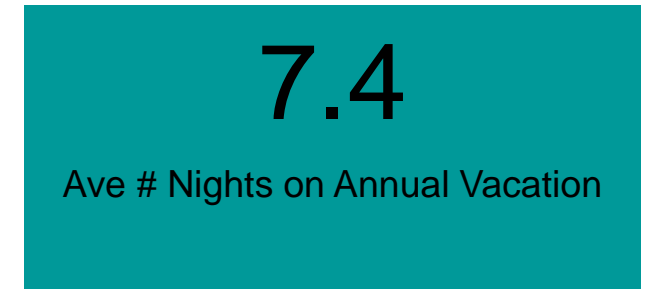
U.S. Avid Travelers \$150k+: Annual Vacation

Average Spend



Sample Size: n=49

Spend Per Person Per Day

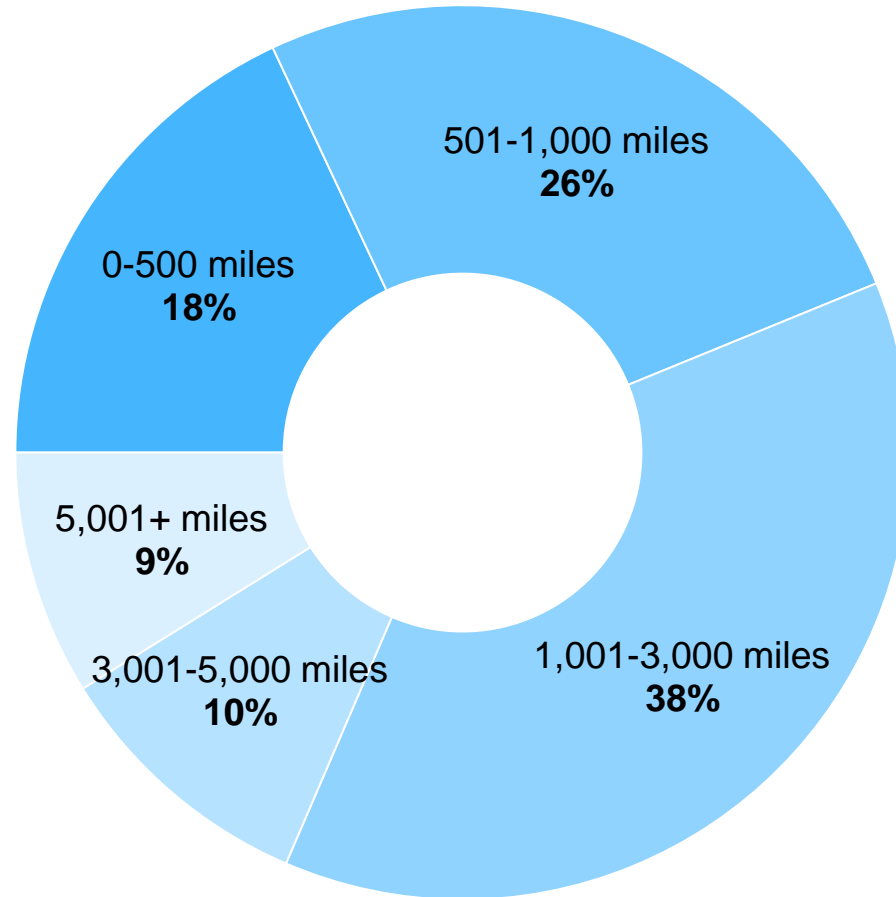


\$185.63

Ave. Per Person Per Day Spend

U.S. Long-Distance Travelers: Annual Vacation

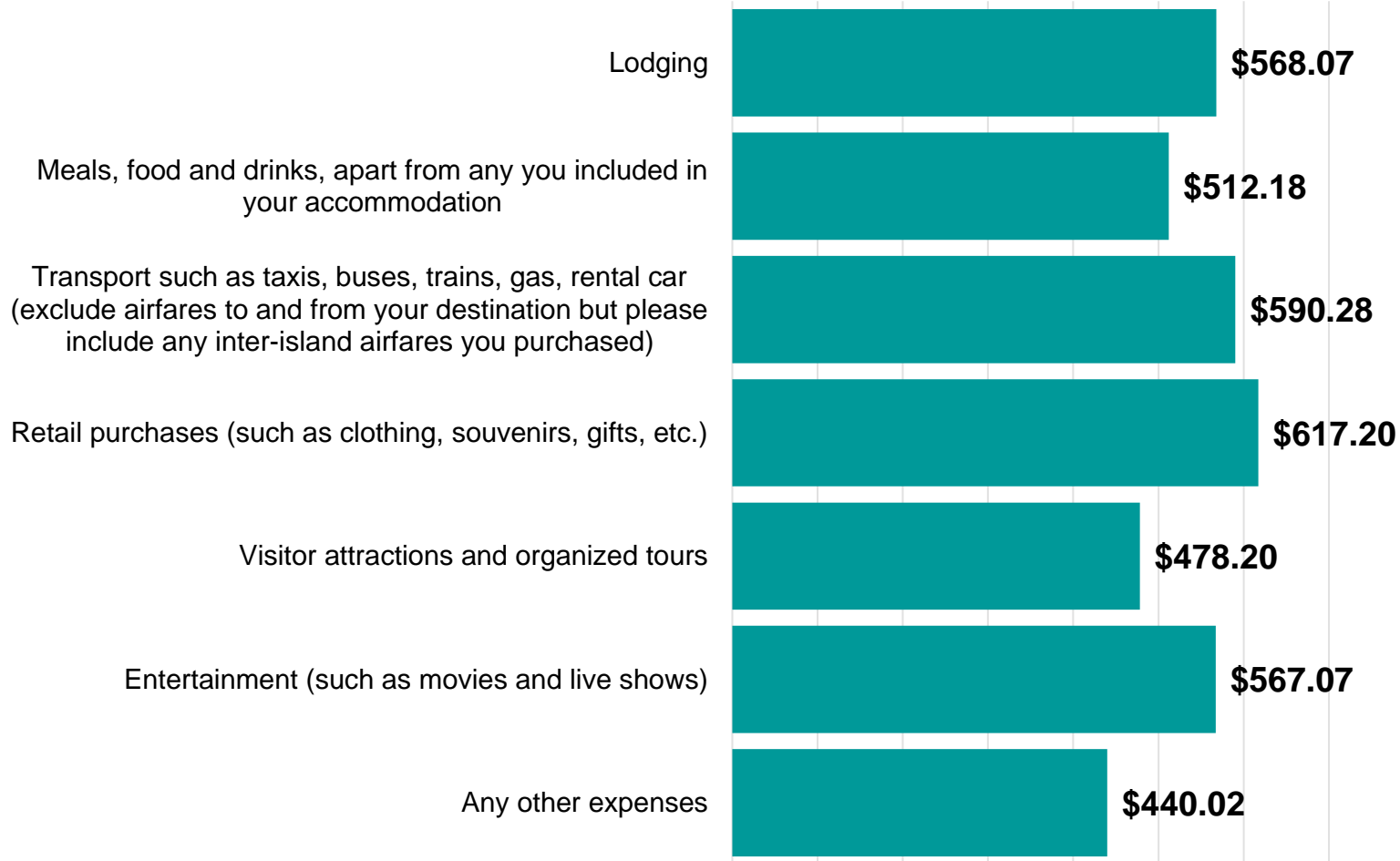
Distance Travelled on Annual Vacation



Sample Size: n=395

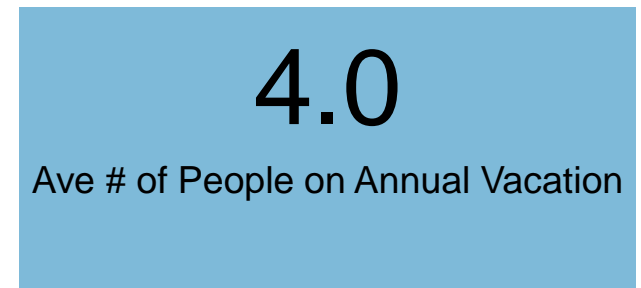
U.S. Long-Distance Travelers: Annual Vacation

Average Spend



Sample Size: n=395

Spend Per Person Per Day

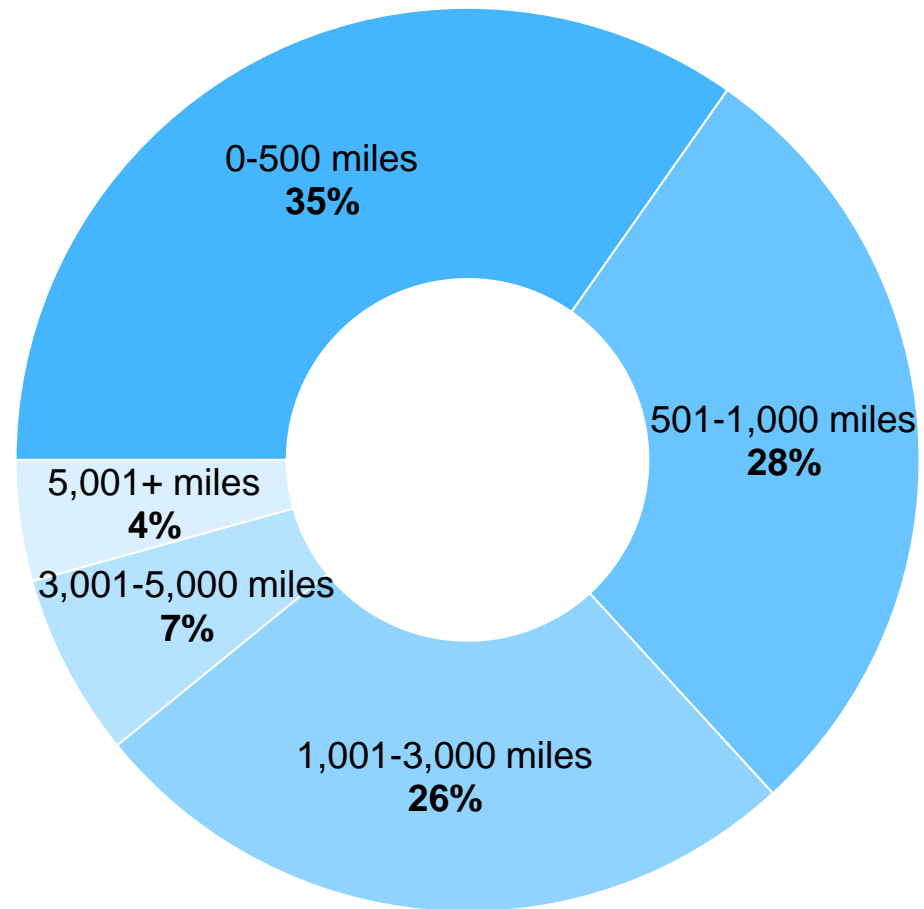


\$169.26

Ave. Per Person Per Day Spend

U.S. Nat Rep: Annual Vacation

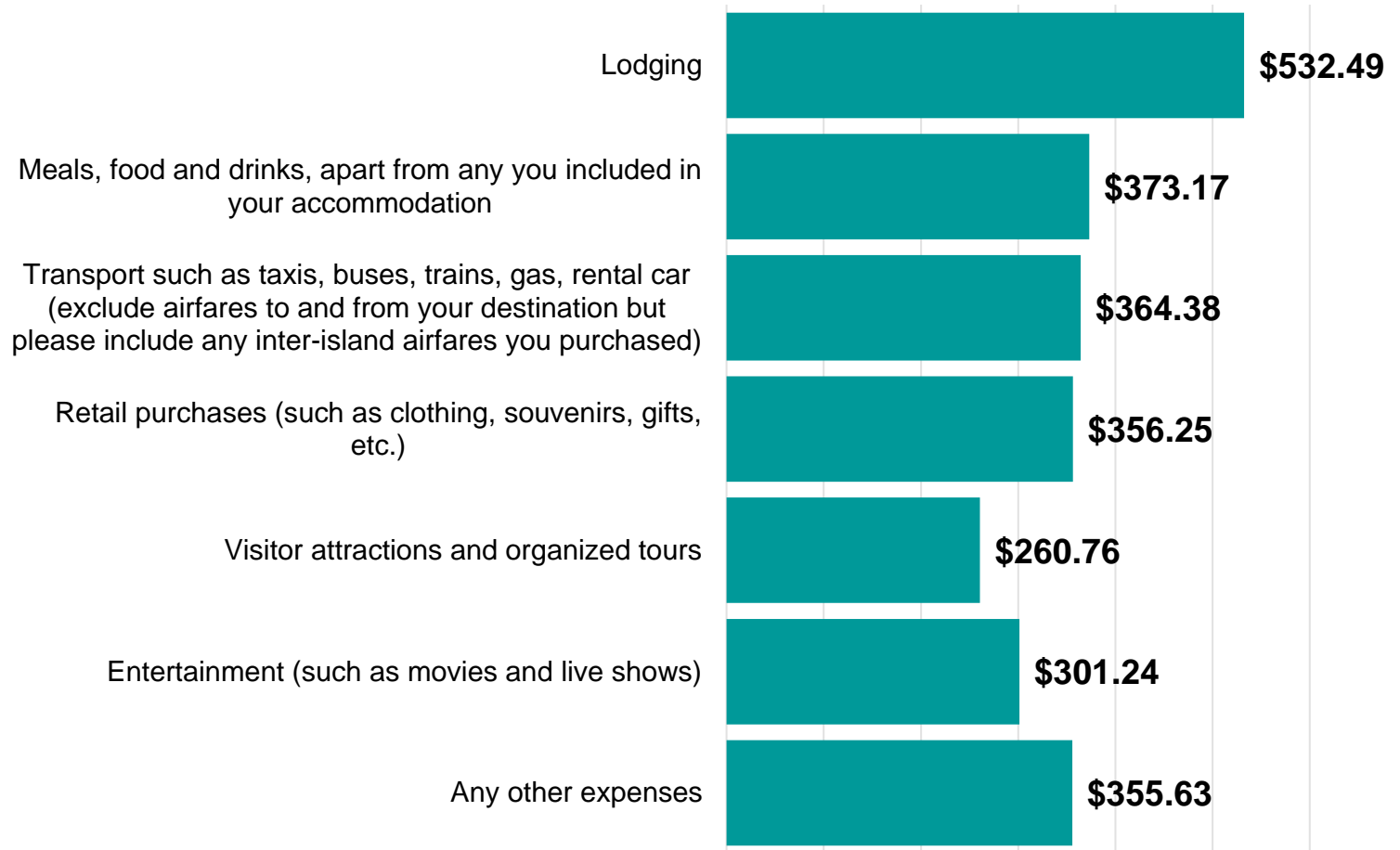
Distance Travelled on Annual Vacation



Sample Size: n=1,917

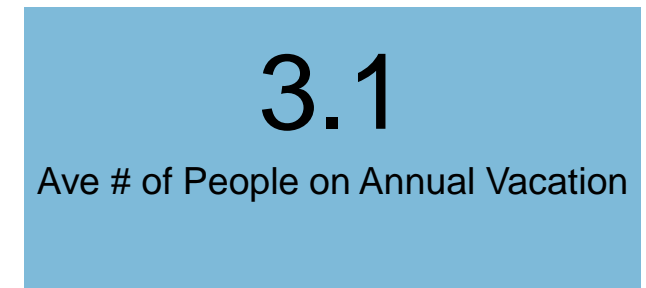
U.S. Nat Rep: Annual Vacation

Average Spend



Sample Size: n=1,917

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	39%	47%	41%	47%
Value for money	58%	64%	51%	56%
Entertainment and nightlife	43%	53%	37%	30%
Consideration of sustainable principles	38%	45%	35%	27%
Natural attractions/activities	46%	43%	41%	41%
Cultural attractions	41%	48%	41%	37%
Opportunity to experience local restaurants/businesses	44%	42%	43%	38%
Family-friendly location and activities	46%	54%	44%	40%
Safe and Secure Destination	54%	60%	46%	58%

Sample Size:

n=150

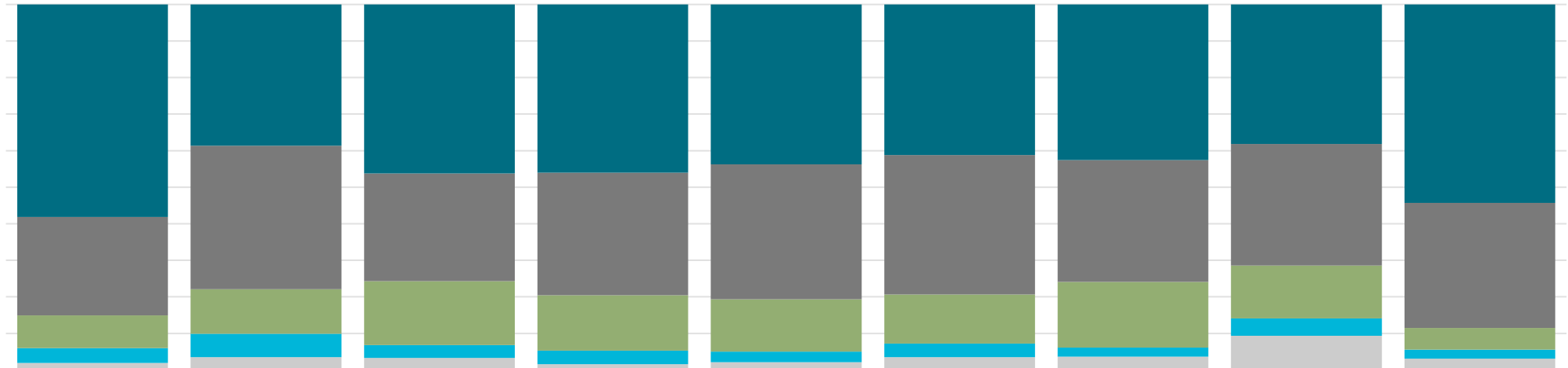
n=49

n=395

n=1,917

How important are the following factors in choosing your travel destination. Please rate the following list with 1 = not very important and 5 = very important?

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

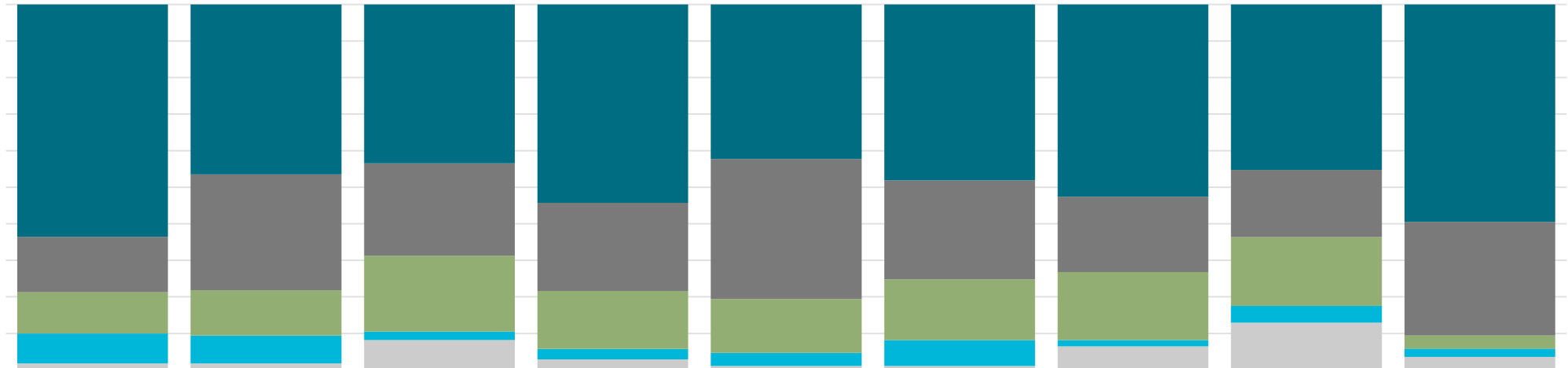


	Value for money	Comfort and accessibility	Natural attractions/activities	Family friendly locations and activities	Opportunity to experience local restaurants/businesses	Cultural attractions	Entertainment and nightlife	Consideration of sustainable principles	Safe and secure destination
Very Important 5	58%	39%	46%	46%	44%	41%	43%	38%	54%
4	27%	39%	29%	34%	37%	38%	33%	33%	34%
3	9%	12%	18%	15%	14%	13%	18%	14%	6%
2	4%	6%	3%	4%	3%	4%	2%	5%	2%
Not very Important 1	2%	3%	3%	2%	2%	3%	4%	9%	3%

Not very Important 1
 2
 3
 4
 Very Important 5

Sample Size: n=150

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

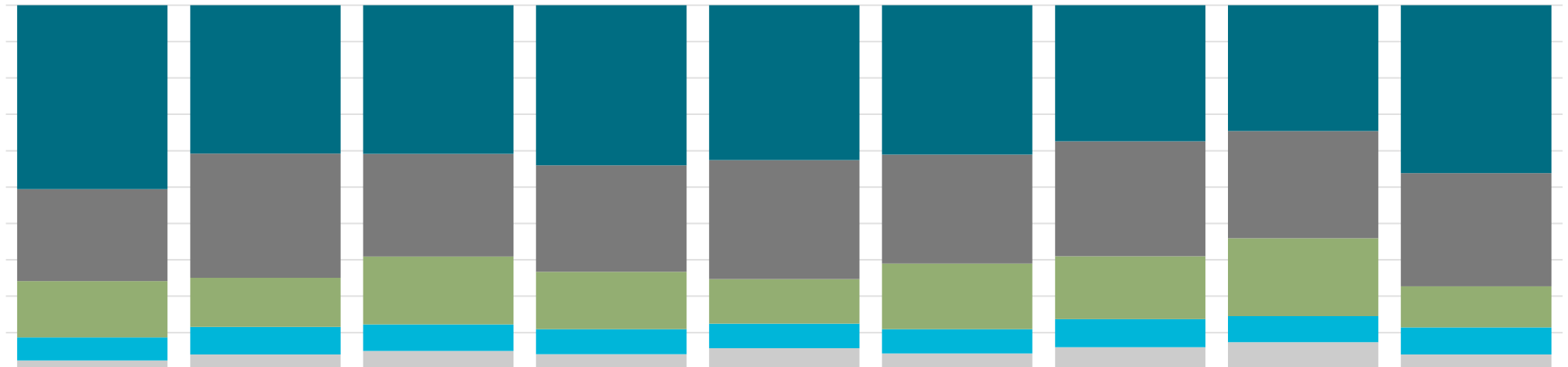


	Value for money	Comfort and accessibility	Natural attractions/activities	Family friendly locations and activities	Opportunity to experience local restaurants/businesses	Cultural attractions	Entertainment and nightlife	Consideration of sustainable principles	Safe and secure destination
Very Important 5	64%	47%	43%	54%	42%	48%	53%	45%	60%
4	15%	32%	25%	24%	38%	27%	21%	18%	31%
3	11%	12%	21%	16%	15%	17%	19%	19%	4%
2	8%	8%	2%	3%	4%	7%	2%	5%	2%
Not very Important 1	2%	2%	8%	3%	1%	1%	6%	13%	4%

Not very Important 1
 2
 3
 4
 Very Important 5

Sample Size: n=49

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

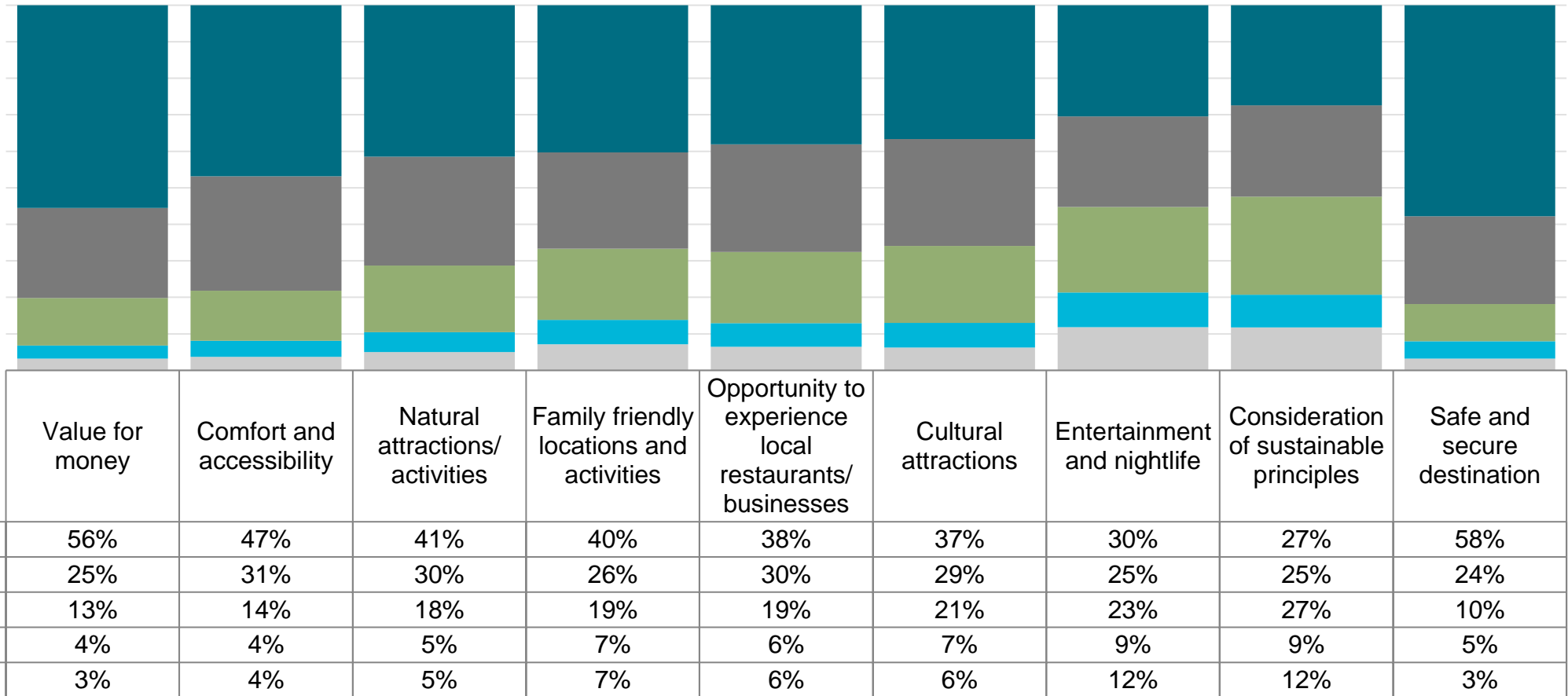


	Value for money	Comfort and accessibility	Natural attractions/activities	Family friendly locations and activities	Opportunity to experience local restaurants/businesses	Cultural attractions	Entertainment and nightlife	Consideration of sustainable principles	Safe and secure destination
Very Important 5	51%	41%	41%	44%	43%	41%	37%	35%	46%
4	25%	34%	28%	29%	33%	30%	32%	29%	31%
3	15%	13%	19%	16%	12%	18%	17%	21%	11%
2	6%	8%	7%	7%	7%	7%	8%	7%	7%
Not very Important 1	2%	4%	5%	4%	6%	4%	6%	7%	4%

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

Sample Size: n=395

U.S. Nat Rep: Importance of Travel Factors

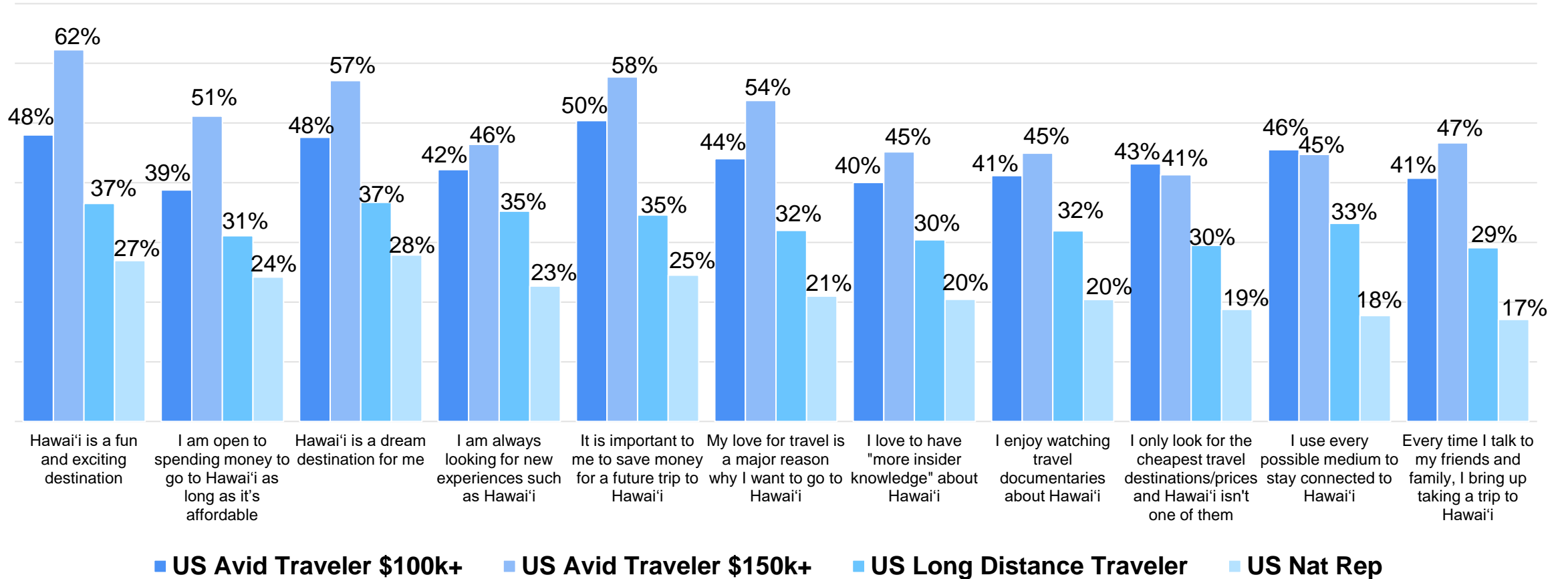


■ Not very Important 1
 ■ 2
 ■ 3
 ■ 4
 ■ Very Important 5

Sample Size: n=1,917

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

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



Sample Size:

n=150

n=49

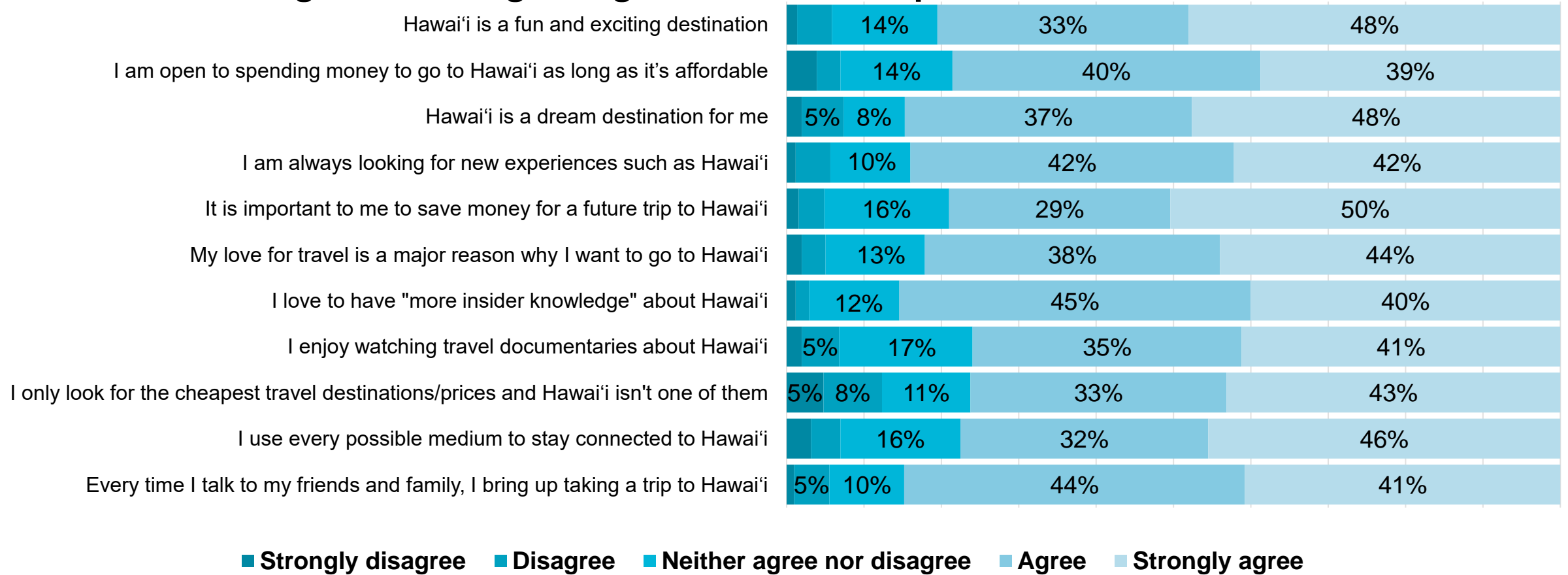
N=395

n=1,917

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

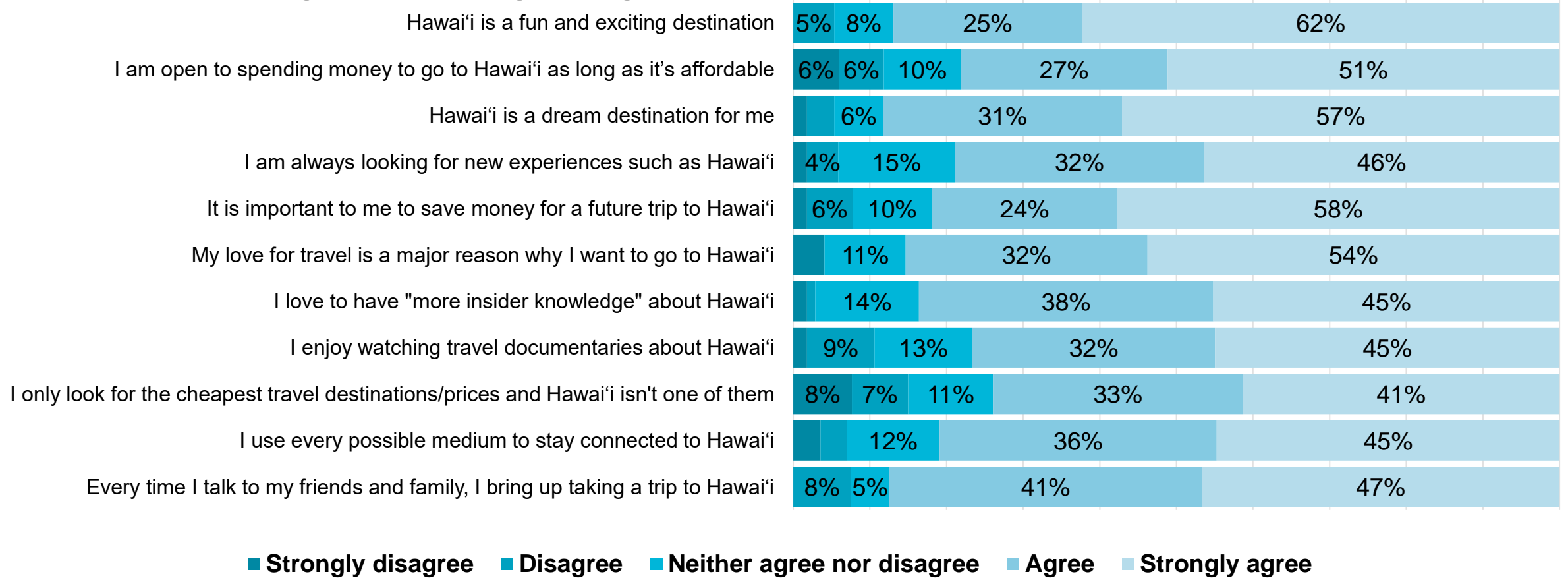
Agreement Regarding Hawai'i as an Aspirational Destination



Sample Size: n=150

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

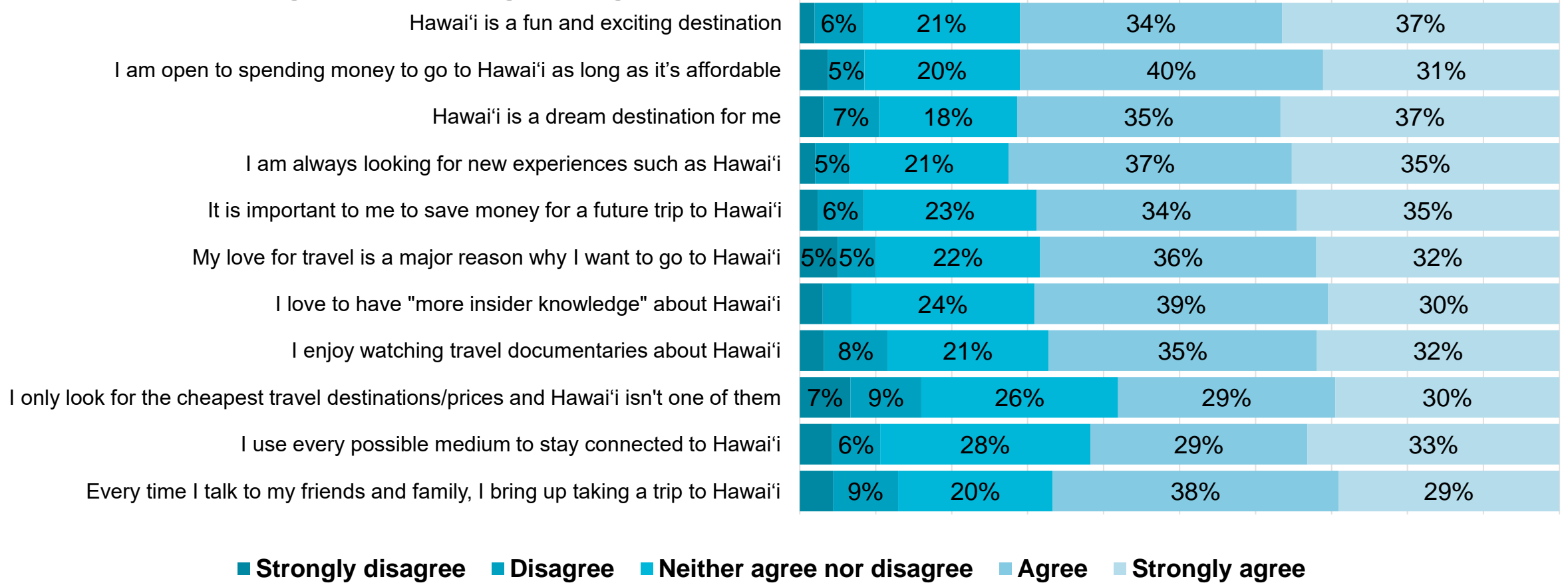
Agreement Regarding Hawai'i as an Aspirational Destination



Sample Size: n=49

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

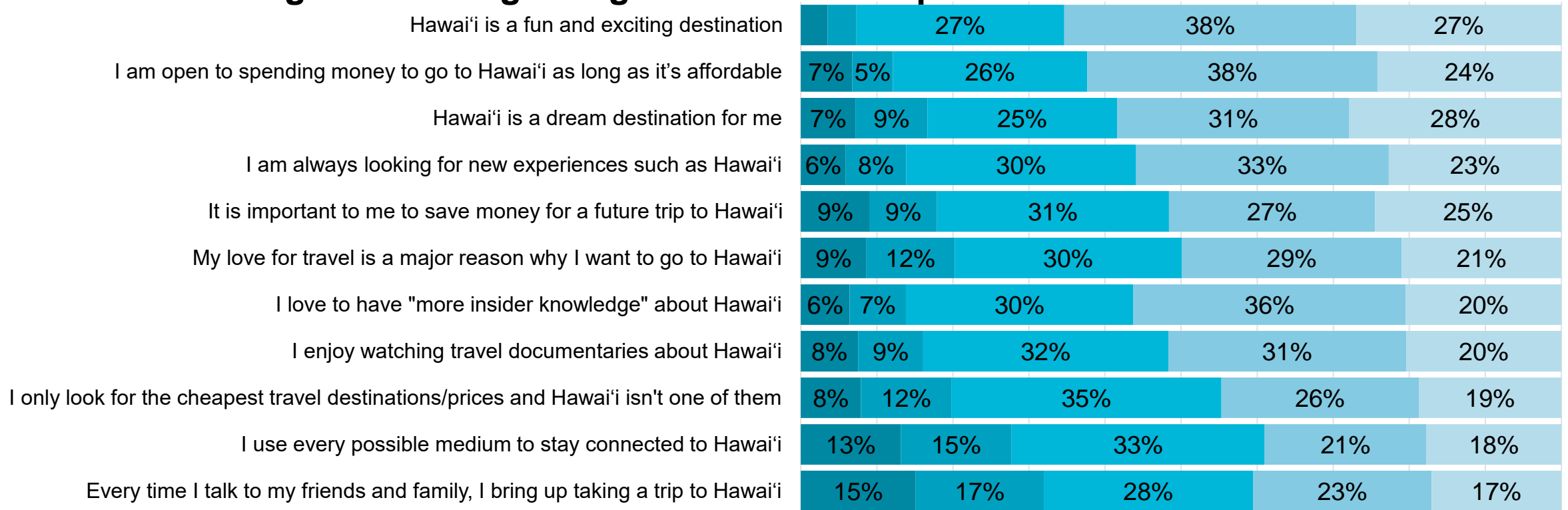
Agreement Regarding Hawai'i as an Aspirational Destination



Sample Size: n=395

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

Agreement Regarding Hawai'i as an Aspirational Destination

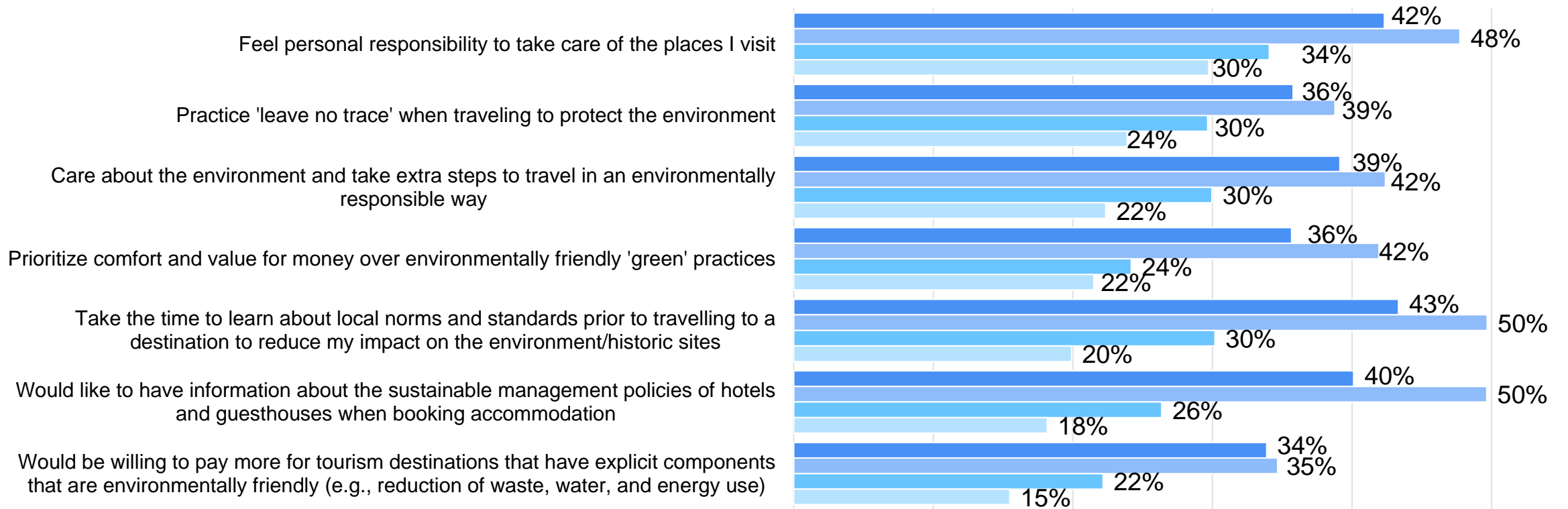


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=1,917

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=150

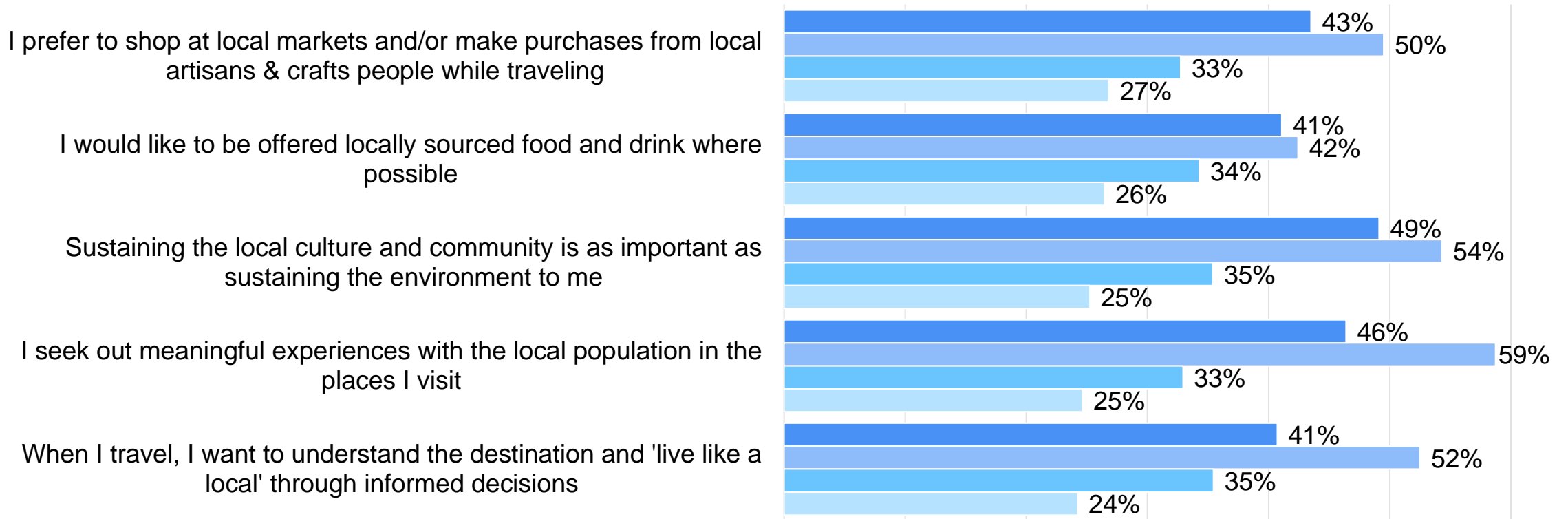
n=49

n=395

n=1,917

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=150

n=49

n=395

n=1,917

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=150

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

Agreement Regarding Sustaining Local Culture While Traveling

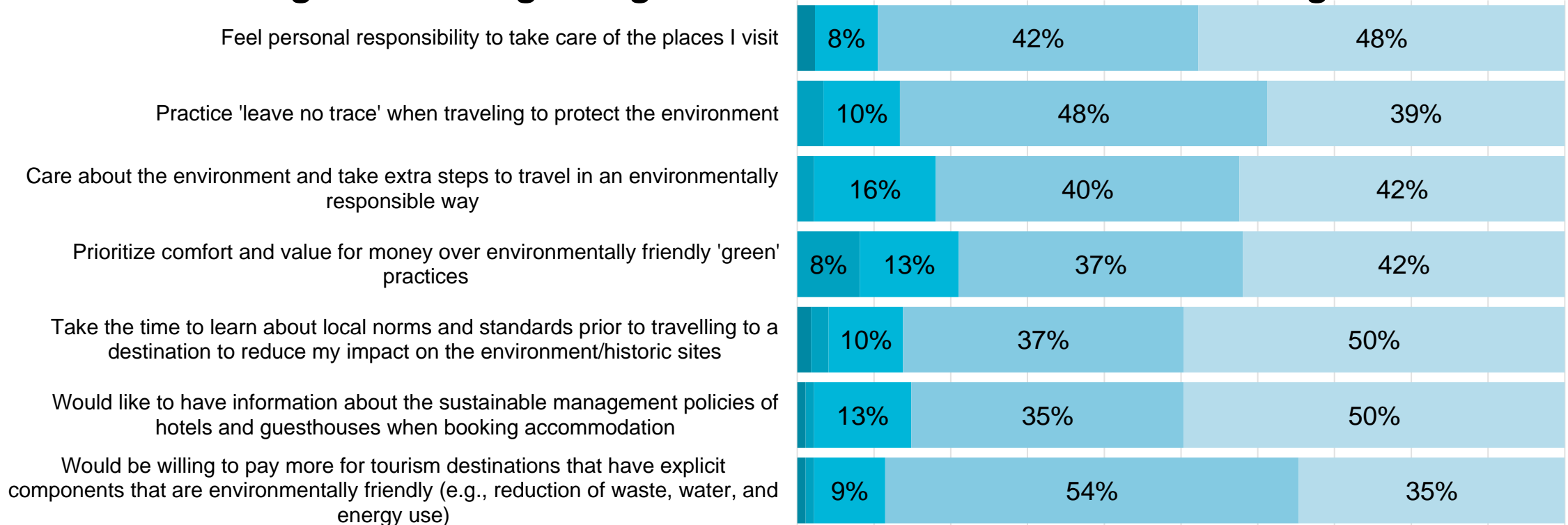


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=150

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

Agreement Regarding Sustainable Practices While Traveling

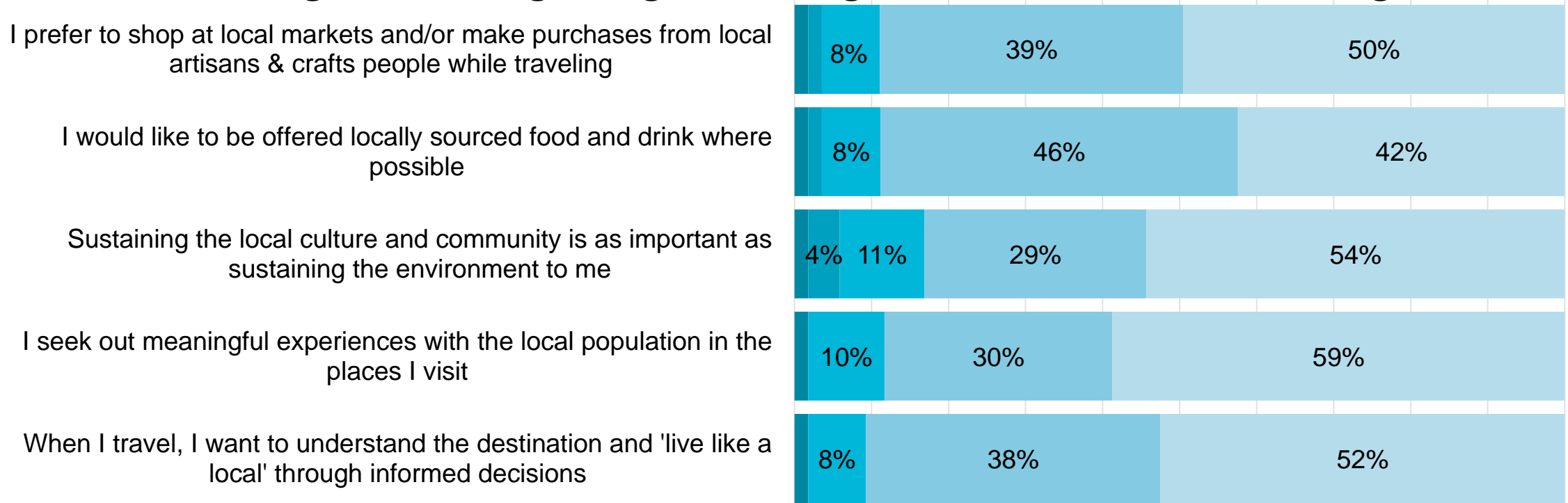


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=49

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

Agreement Regarding Sustaining Local Culture While Traveling

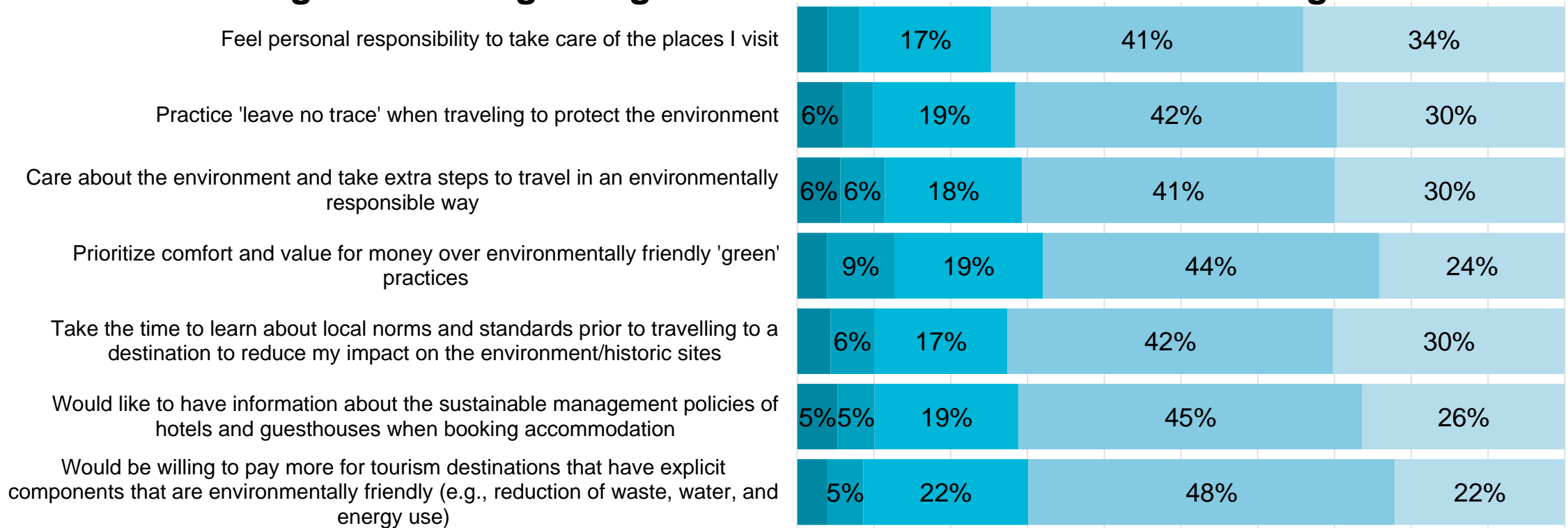


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=49

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=395

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

Agreement Regarding Sustaining Local Culture While Traveling

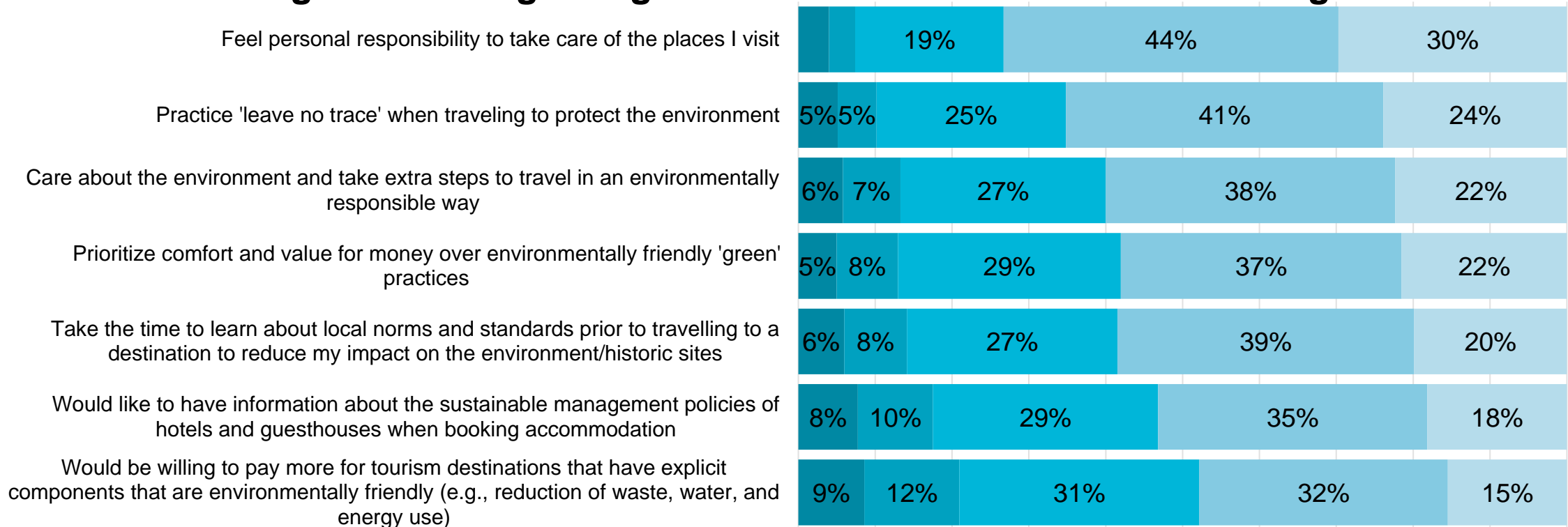


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=395

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

Agreement Regarding Sustainable Practices While Traveling

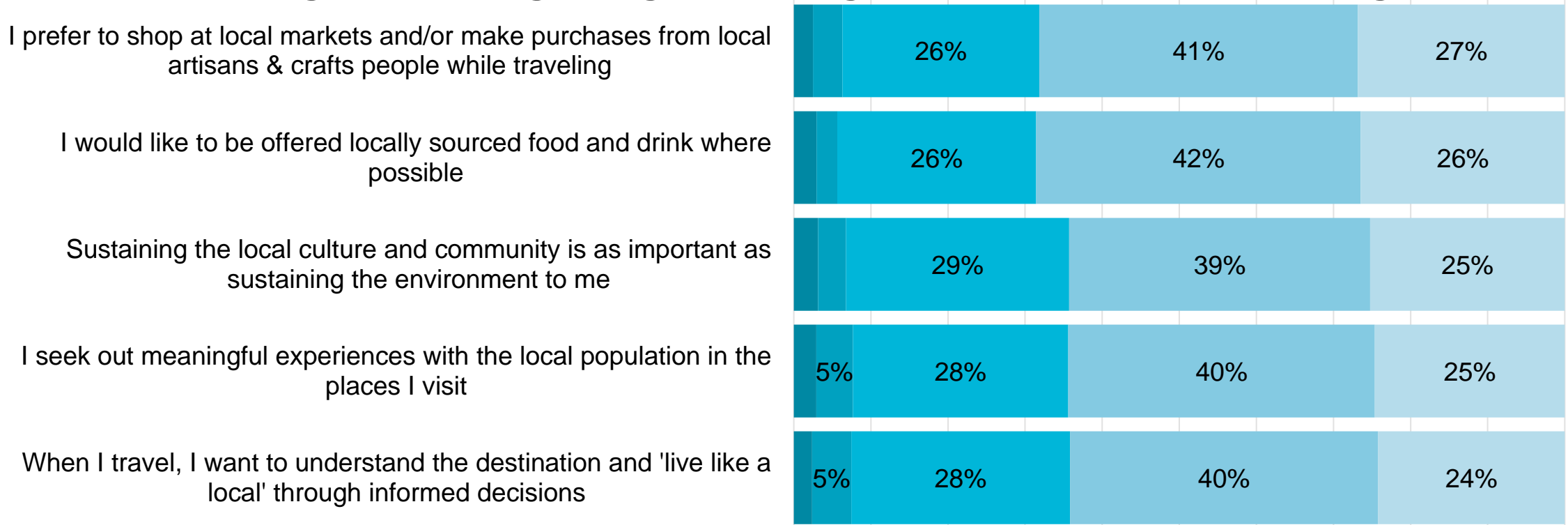


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=1,917

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

Agreement Regarding Sustaining Local Culture While Traveling

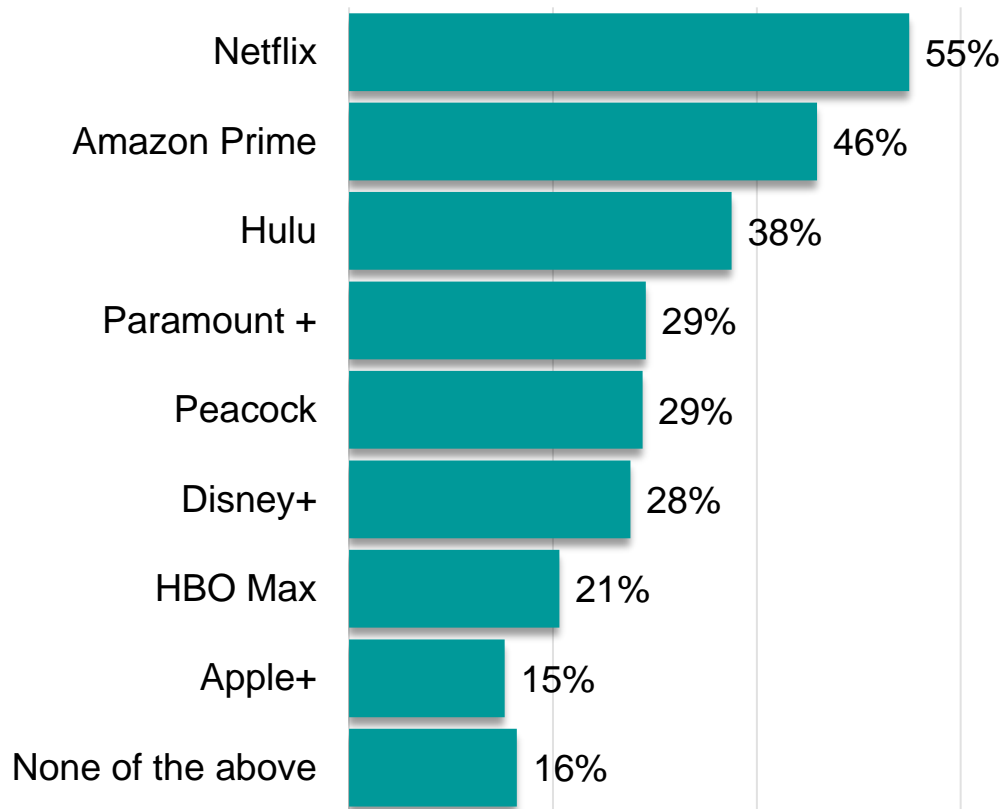


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

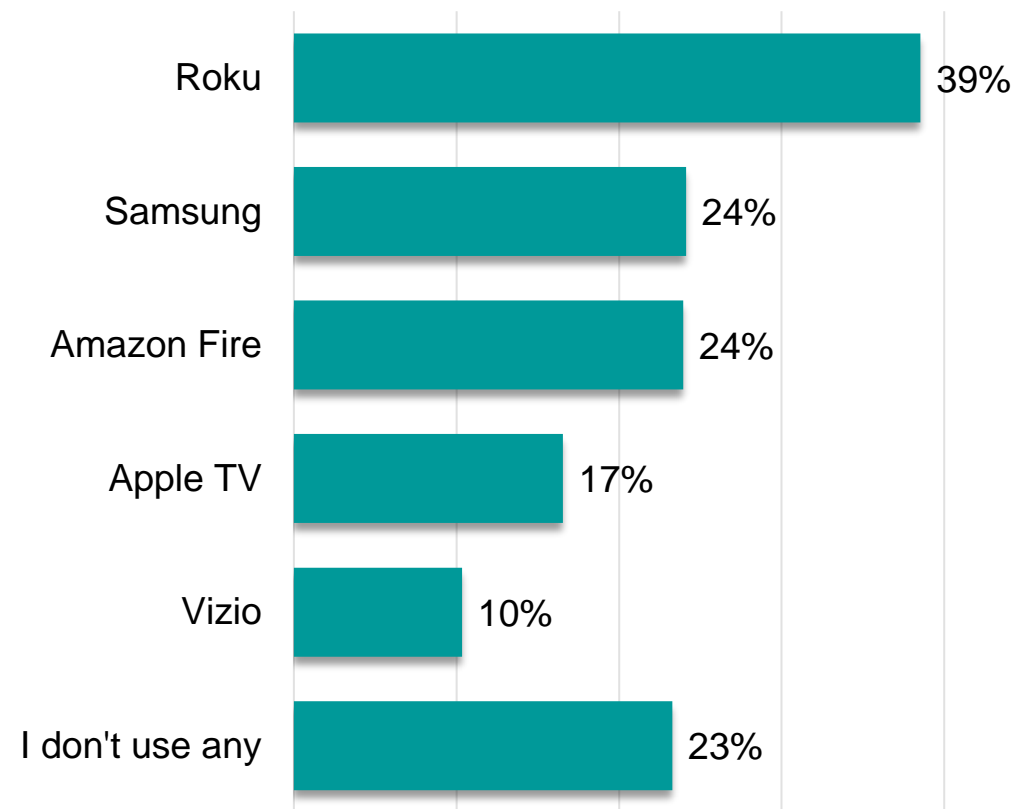
Sample Size: n=1,917

U.S. Media Consumption

Streaming Platforms Used Weekly



Connected Device Used

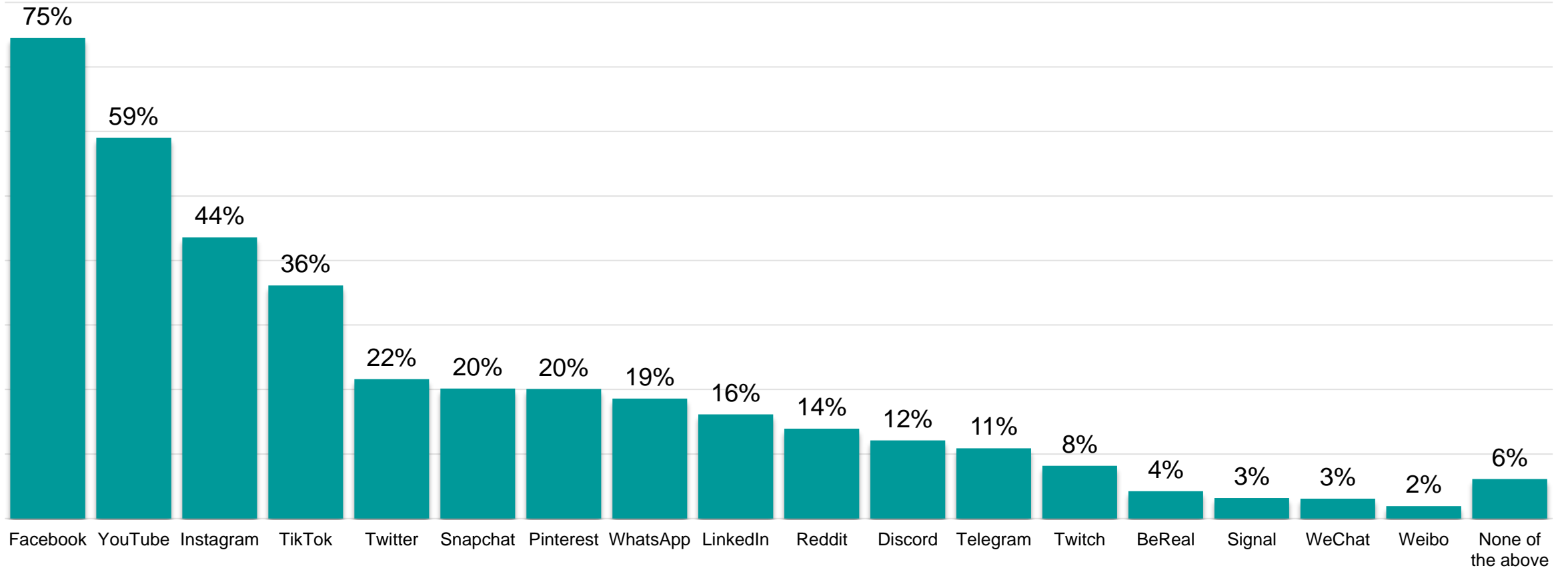


Sample Size: n=1,917

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=1,917

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	40%
Online	32%
Social Media	37%
TV commercials	29%
YouTube	34%
TV Program/Documentary	19%
Email	17%
Radio	9%
Newspaper	10%
Out of home advertising (e.g. Poster Billboards, bus shelter advertisements, etc.)	7%
I don't recall	13%

Actions Taken After Seeing an Ad for a Destination

I search for information about the destination online	39%
I talk to friends/family about the destination	33%
I go to the destination's website	32%
I look up the destination on social media	25%
I book travel to the destination almost immediately	14%
I don't do anything	16%
None of the above	10%

Sample Size: n=1,917