VISION INSIGHTS

Vision Insights U.S. Traveler Profiles January 2025

February 27, 2025





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 Hawaii 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

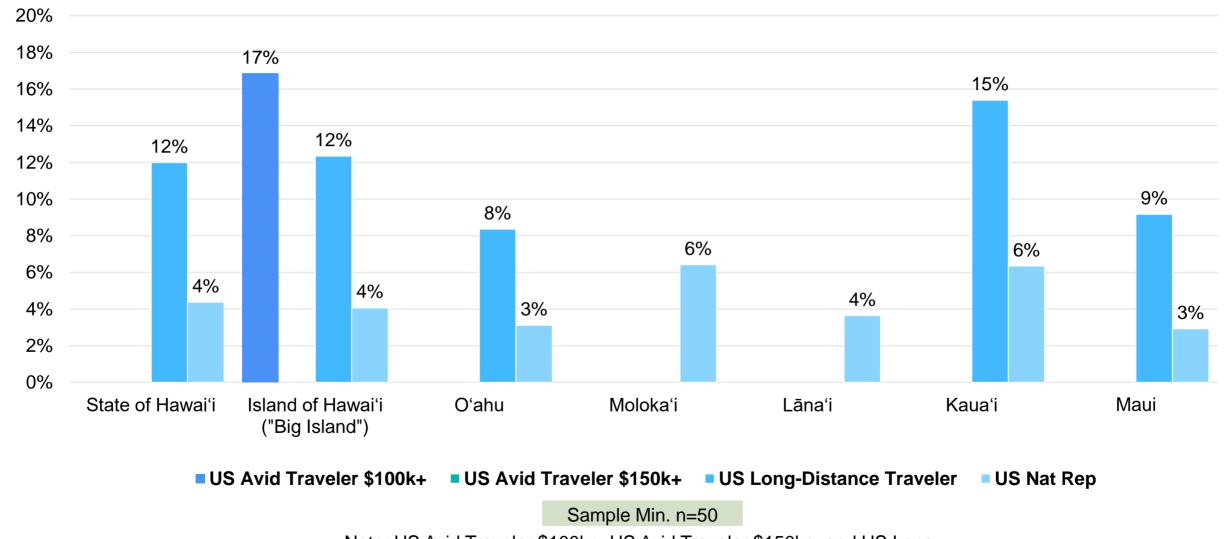
Avid Traveler \$150k+

- 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 Hawaii or Alaska

Nationally Representative Sample (Nat Rep)

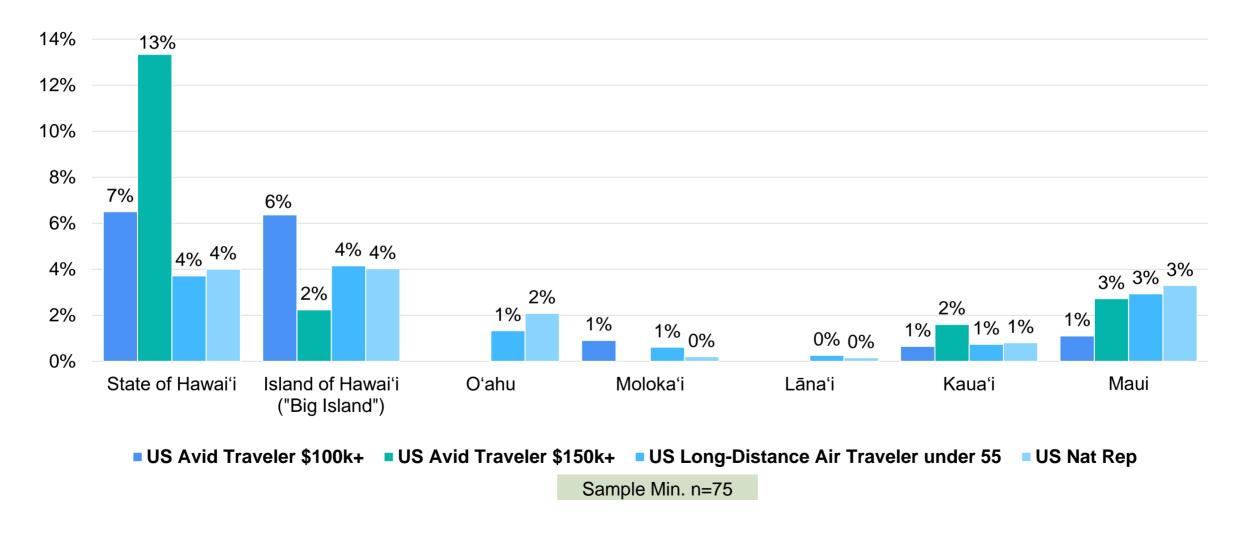
 Representative of U.S. adults in terms of age, gender, social class and education

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	19.6%
Texas	11.2%
Florida	10.0%
California	8.4%
Washington	5.1%
Pennsylvania	4.5%
Georgia	4.0%
Illinois	3.7%
Virginia	0.6%
Minnesota	0.0%

	%
Florida	10.5%
New York	7.8%
Texas	6.8%
California	6.5%
Pennsylvania	5.4%
Illinois	4.1%
Virginia	2.6%
New Jersey	2.4%
Colorado	1.4%
Washington	1.2%

	%
New York	12.4%
Florida	10.9%
California	8.7%
Georgia	7.2%
Texas	7.0%
Pennsylvania	5.4%
Illinois	4.1%
Virginia	2.3%
Washington	2.0%
Minnesota	0.4%

	%
	70
Florida	10.5%
New York	7.8%
Texas	6.8%
California	6.5%
Pennsylvania	5.4%
Georgia	4.6%
North Carolina	4.4%
Illinois	4.1%
Ohio	4.1%
Virginia	2.6%
n-1 003	

Sample Size:

n=157

n=64

n=371

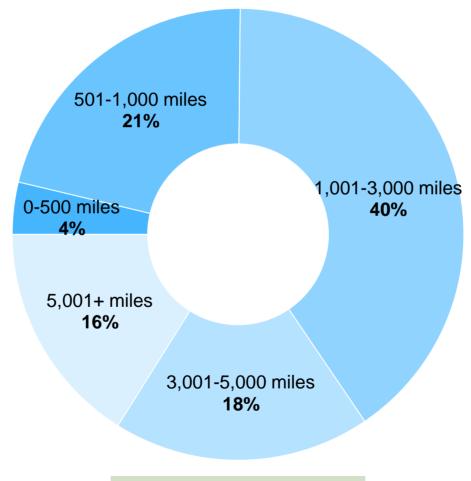
n=1,903

U.S. - Total Annual Holiday Spend

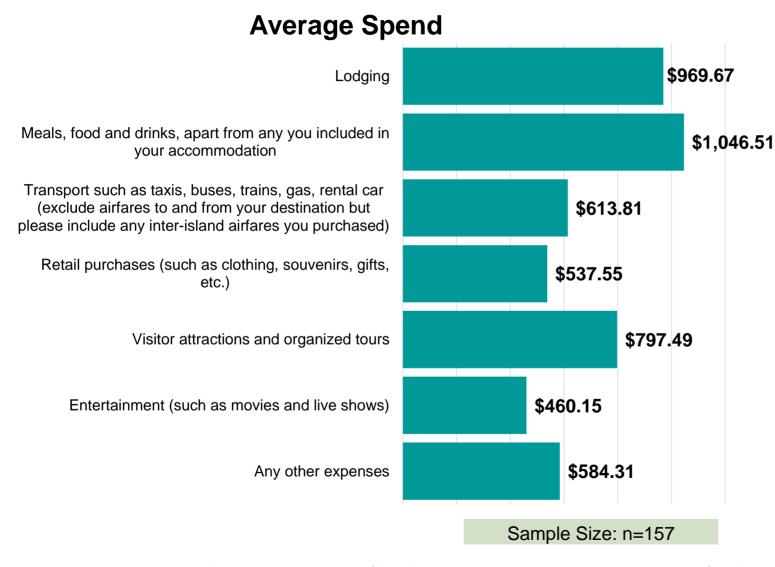


U.S. Avid Travelers \$100k+: Annual Vacation

Distance Travelled on Annual Vacation



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



Spend Per Person Per Day

5.9

Ave # Nights on Annual Vacation

4.0

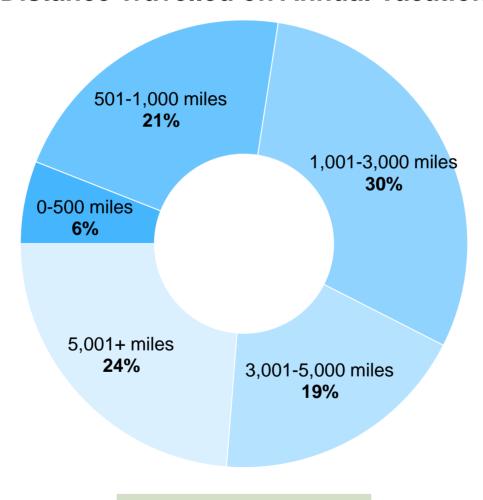
Ave # of People on Annual Vacation



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

Average Spend

\$999.50 Lodging Meals, food and drinks, apart from any you included in \$676.57 vour accommodation Transport such as taxis, buses, trains, gas, rental car \$652.18 (exclude airfares to and from your destination but please include any inter-island airfares you purchased) Retail purchases (such as clothing, souvenirs, gifts, \$597.14 etc.) \$417.21 Visitor attractions and organized tours \$370.93 Entertainment (such as movies and live shows) \$409.02 Any other expenses Sample Size: n=64

Spend Per Person Per Day

6.4

Ave # Nights on Annual Vacation

4.6

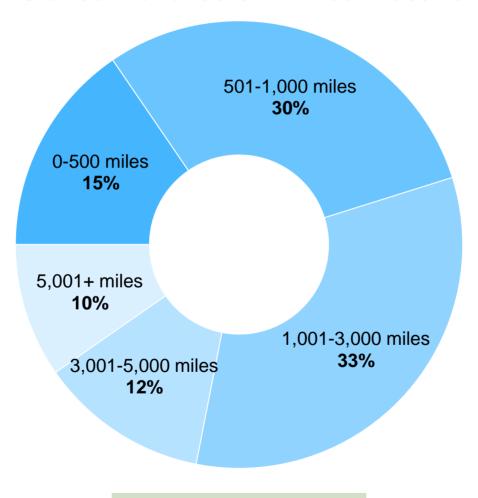
Ave # of People on Annual Vacation



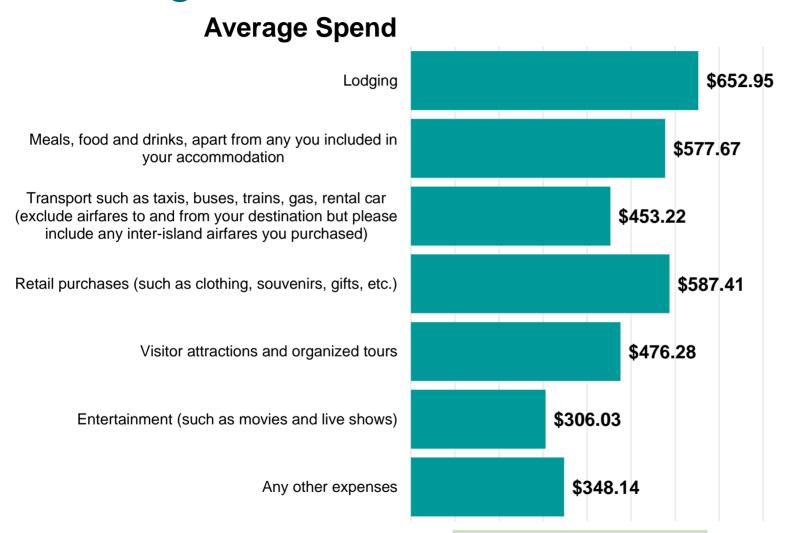
Ave. Per Person Per Day Spend

U.S. Long-Distance Travelers: Annual Vacation

Distance Travelled on Annual Vacation



U.S. Long-Distance Travelers: Annual Vacation



Spend Per Person Per Day

5.2

Ave # Nights on Annual Vacation

3.4

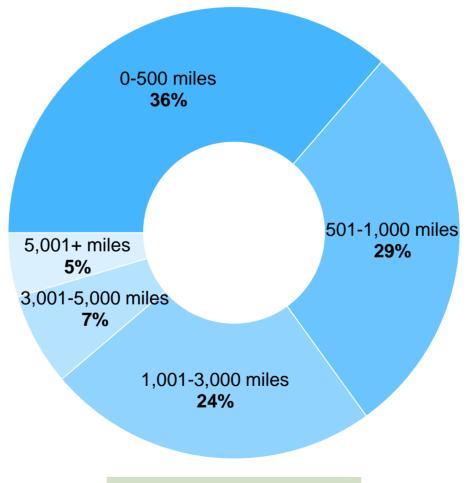
Ave # of People on Annual Vacation



Ave. Per Person Per Day Spend

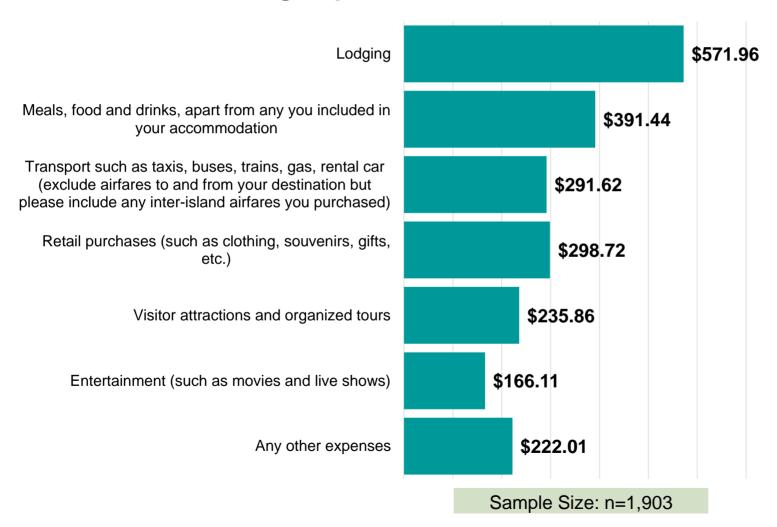
U.S. Nat Rep: Annual Vacation

Distance Travelled on Annual Vacation



U.S. Nat Rep: Annual Vacation

Average Spend



Spend Per Person Per Day

5.4

Ave # Nights on Annual Vacation

2.9

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	53%	50%	47%	50%
Value for money	47%	46%	49%	54%
Entertainment and nightlife	42%	38%	37%	28%
Consideration of sustainable principles	49%	56%	38%	28%
Natural attractions/activities	53%	45%	44%	41%
Cultural attractions	45%	39%	40%	36%
Opportunity to experience local restaurants/businesses	51%	41%	43%	38%
Family-friendly location and activities	48%	49%	42%	39%
Safe and Secure Destination	60%	60%	53%	60%
Sample Size:	n_157	2-61	n_271	n_1 002

Sample Size:

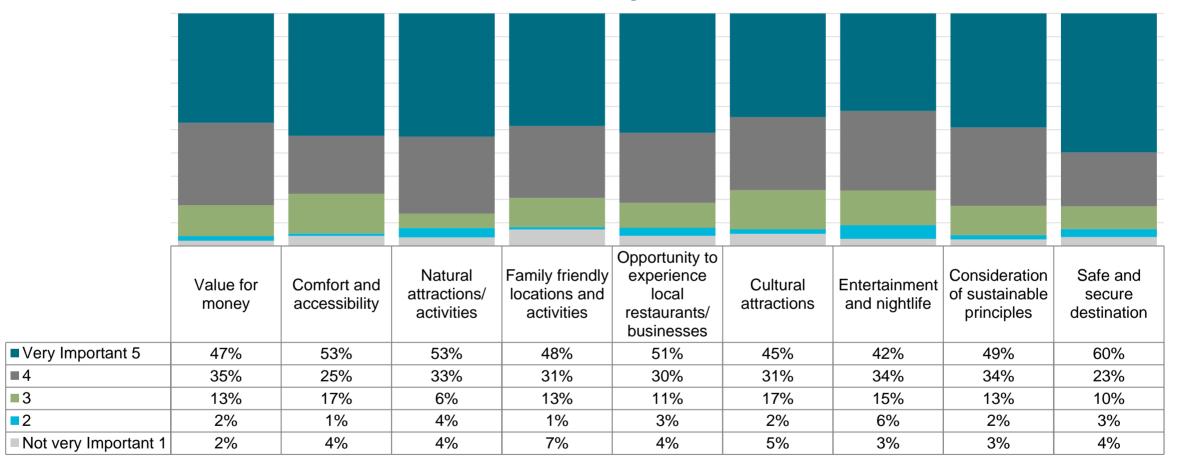
n=157

n=64

n=371

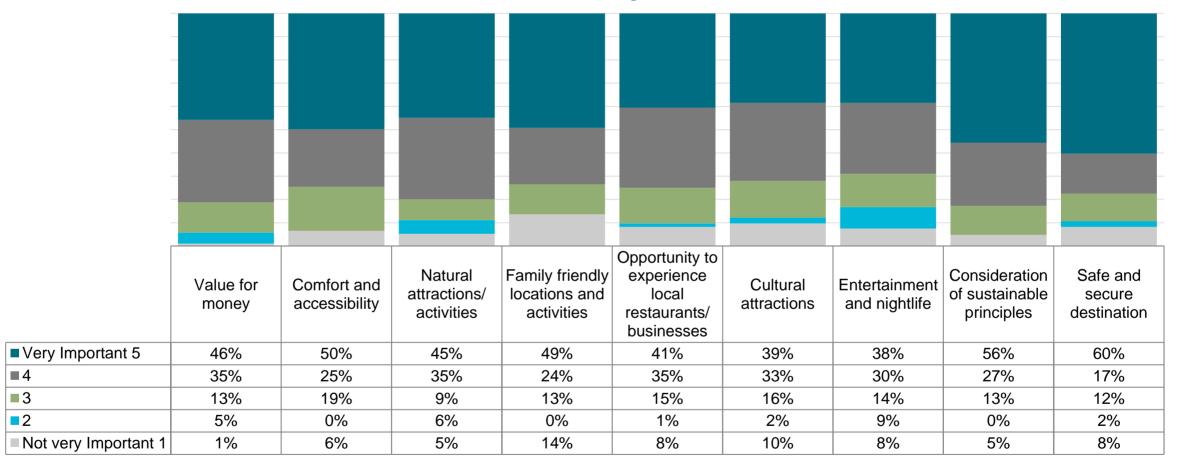
n=1,903

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



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

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

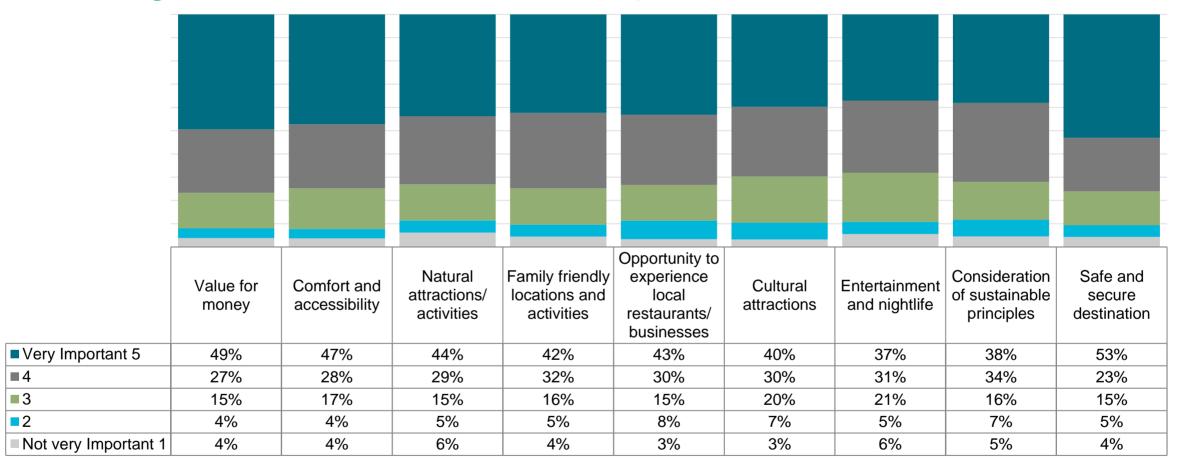


■ Not very Important 1 ■ 2 ■ 3 ■ 4

Sample Size: n=64

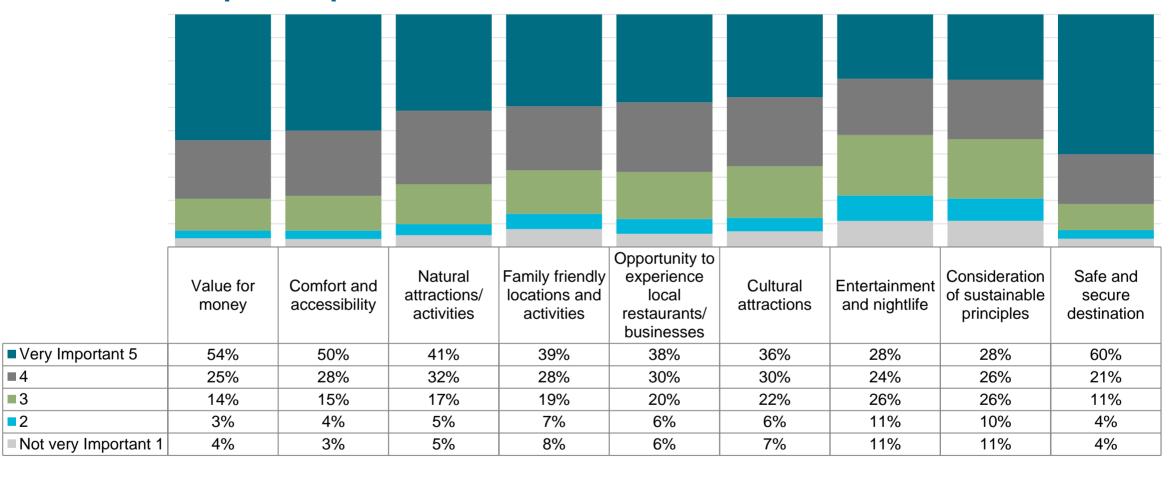
■ Very Important 5

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



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

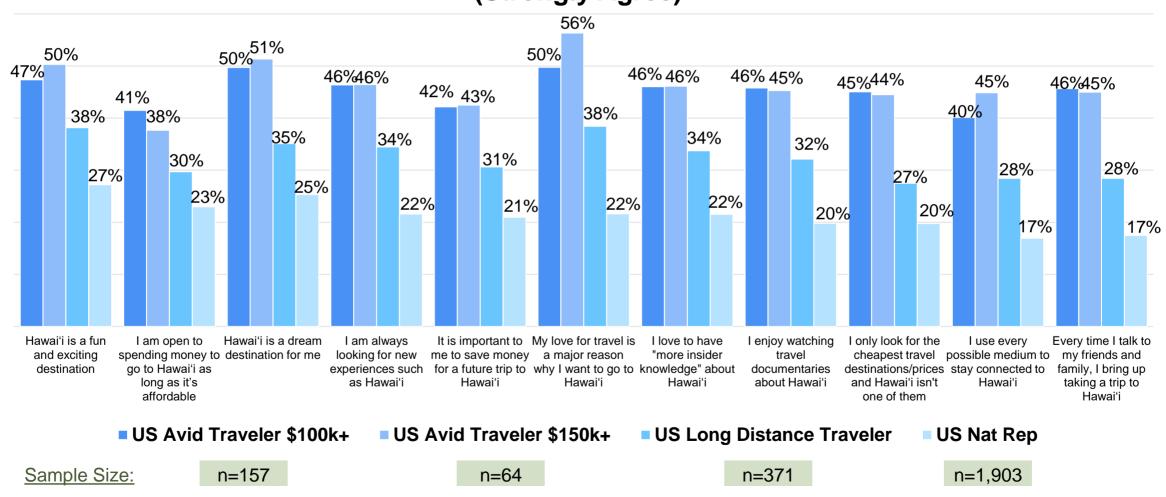
U.S. Nat Rep: Importance of Travel Factors



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

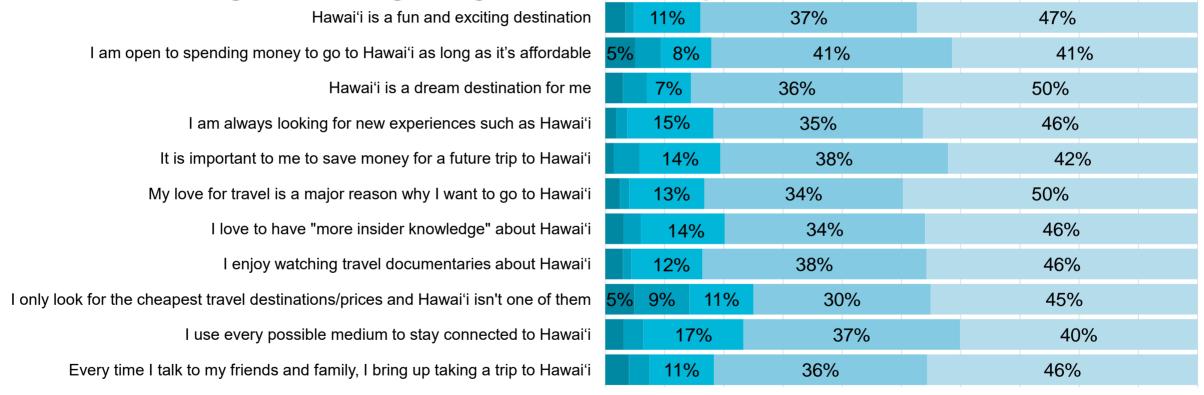
U.S. - Hawai'i as an Aspirational Destination

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



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

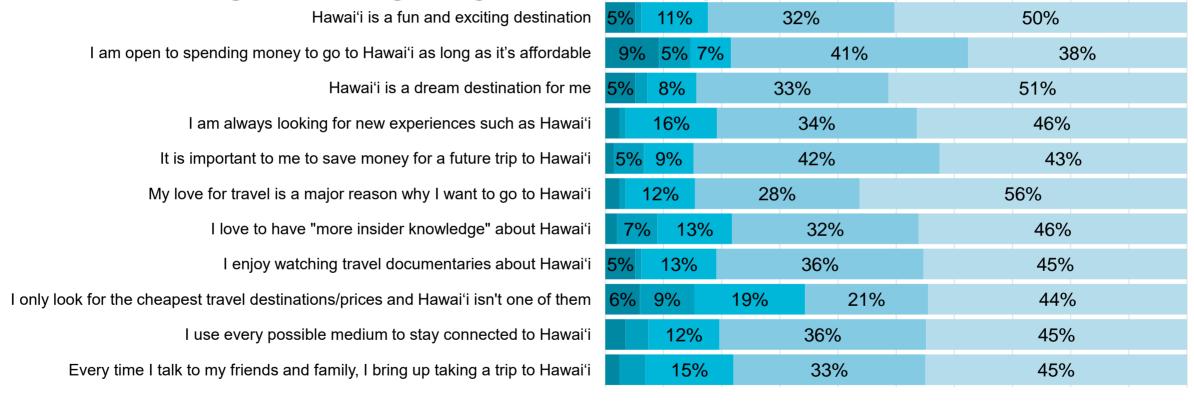
Agreement Regarding Hawai'i as an Aspirational Destination



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

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

Agreement Regarding Hawai'i as an Aspirational Destination



Sample Size: n=64

■ Neither agree nor disagree

Strongly agree

Agree

Disagree

Strongly disagree

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	229	%	37%	38%
I am open to spending money to go to Hawai'i as long as it's affordable	5%	18%	42%	30%
Hawaiʻi is a dream destination for me	6%	21%	35%	35%
I am always looking for new experiences such as Hawaiʻi	5%	19%	39%	34%
It is important to me to save money for a future trip to Hawaiʻi	5%	19%	41%	31%
My love for travel is a major reason why I want to go to Hawaiʻi	5%	24%	30%	38%
I love to have "more insider knowledge" about Hawaiʻi	6%	22%	35%	34%
I enjoy watching travel documentaries about Hawaiʻi	5%	24%	36%	32%
I only look for the cheapest travel destinations/prices and Hawai'i isn't one of them	7% 12%	% 24%	29%	27%
I use every possible medium to stay connected to Hawaiʻi	8%	26%	34%	28%
Every time I talk to my friends and family, I bring up taking a trip to Hawaiʻi	6% 6%	23%	36%	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	29	9%	38%	27%
I am open to spending money to go to Hawaiʻi as long as it's affordable	6% 6%	25%	39%	23%
Hawaiʻi is a dream destination for me	7% 9%	26%	32%	25%
I am always looking for new experiences such as Hawaiʻi	7% 8%	30%	33%	22%
It is important to me to save money for a future trip to Hawaiʻi	9% 10%	29%	31%	21%
My love for travel is a major reason why I want to go to Hawaiʻi	8% 11%	32%	27%	22%
I love to have "more insider knowledge" about Hawaiʻi	7% 8%	32%	32%	22%
I enjoy watching travel documentaries about Hawaiʻi	7% 8%	32%	33%	20%
I only look for the cheapest travel destinations/prices and Hawai'i isn't one of them	8% 13%	34%	25%	20%
I use every possible medium to stay connected to Hawaiʻi	12% 16	3	4% 22%	6 17%
Every time I talk to my friends and family, I bring up taking a trip to Hawaiʻi	16%	16%	28% 22%	17%

■ 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

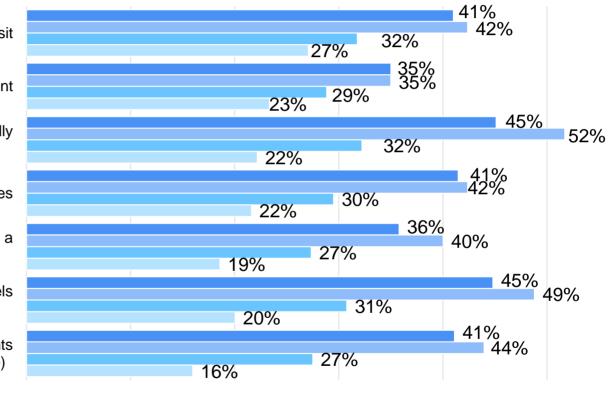
Care about the environment and take extra steps to travel in an environmentally responsible way

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=157

n = 64

n = 371

n=1.903

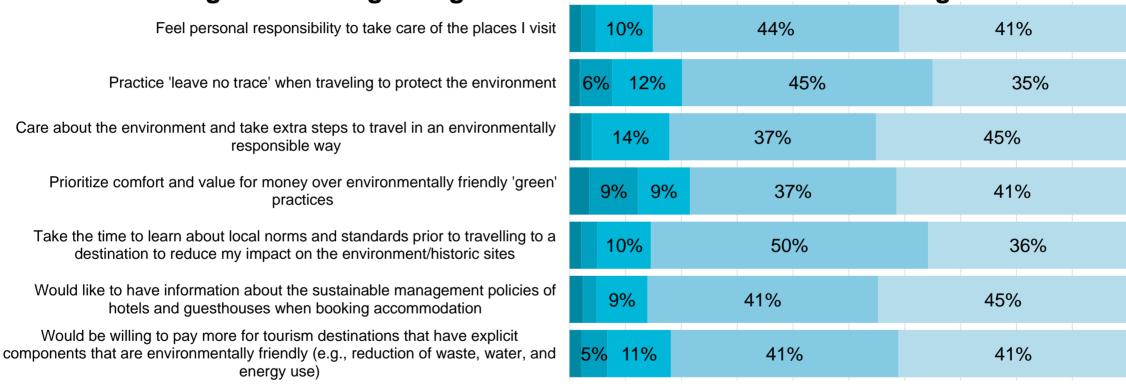
U.S. - Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling (Strongly Agree)



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

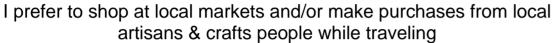
Agreement Regarding Sustainable Practices While Traveling



■ Strongly disagree Disagree ■ Neither agree nor disagree Aaree Strongly agree

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

Agreement Regarding Sustaining Local Culture While Traveling

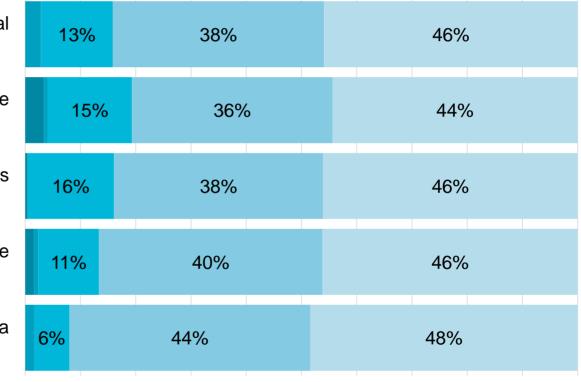


I would like to be offered locally sourced food and drink where possible

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

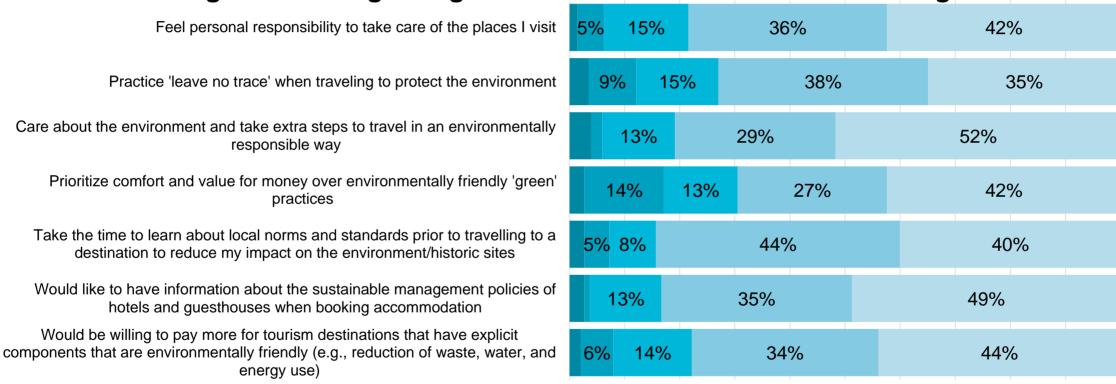
When I travel. I want to understand the destination and 'live like a local' through informed decisions



■ 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 Strongly agree 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



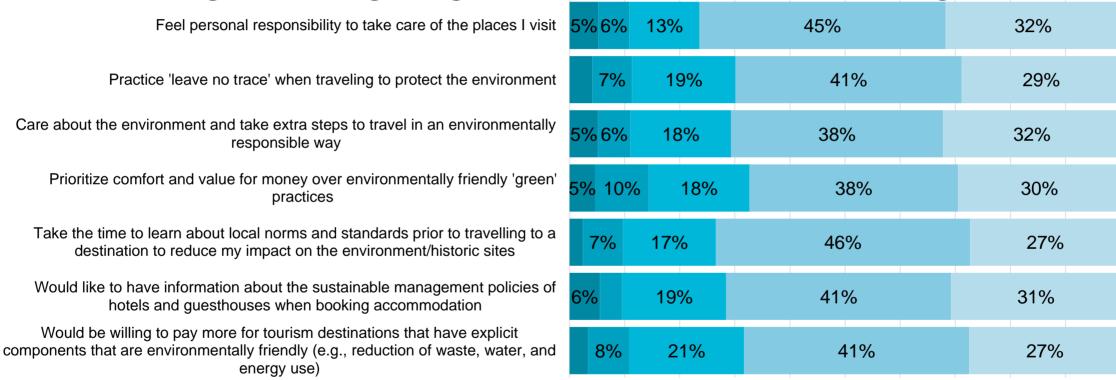
■ Strongly disagree
■ Disagree
■ Neither agree nor disagree
■ Agree
■ Strongly agree

Sample Size: n=64

with the following statements about sustainability of culture and community.

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

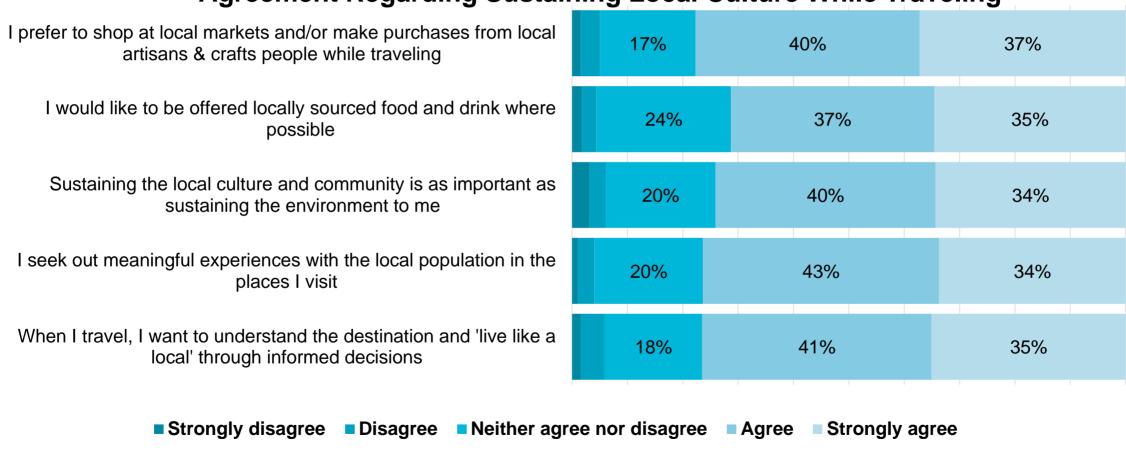
Agreement Regarding Sustainable Practices While Traveling



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

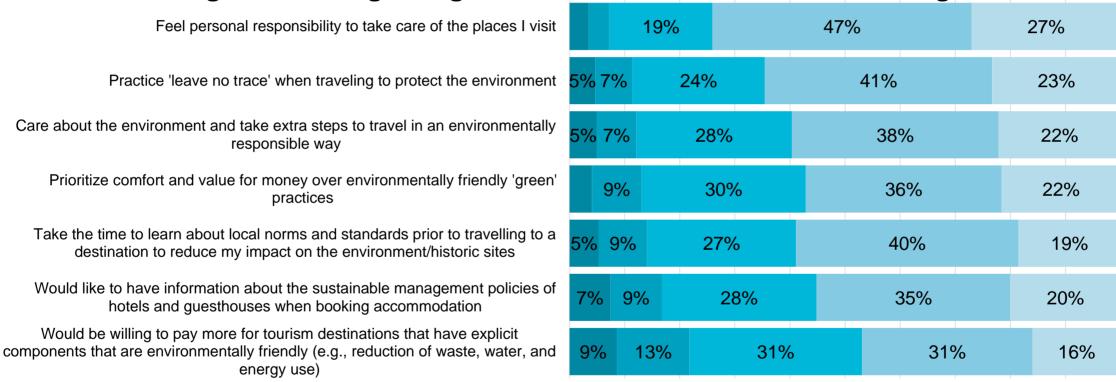
U.S. Long Distance Traveler: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling



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

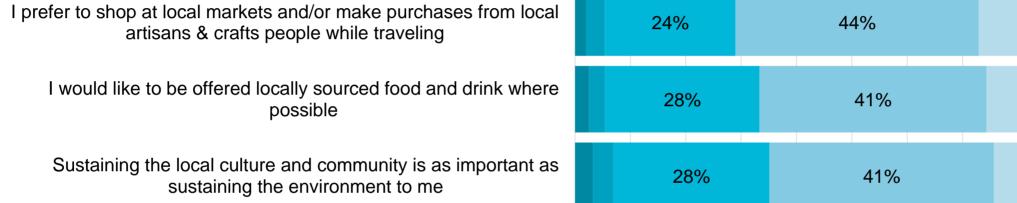
Agreement Regarding Sustainable Practices While Traveling



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

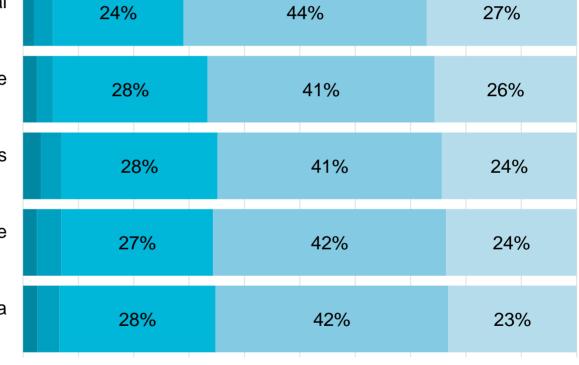
U.S. Nat Rep: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling



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

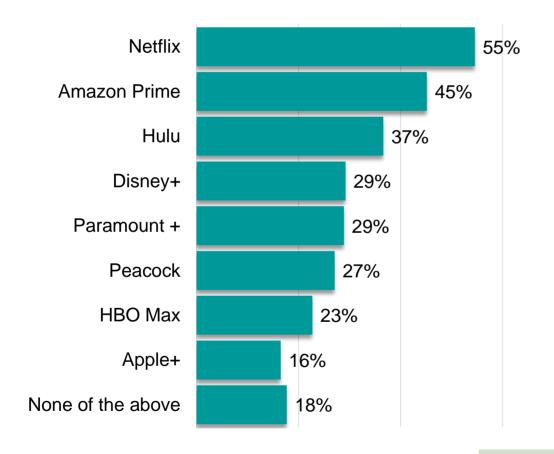
When I travel. I want to understand the destination and 'live like a local' through informed decisions



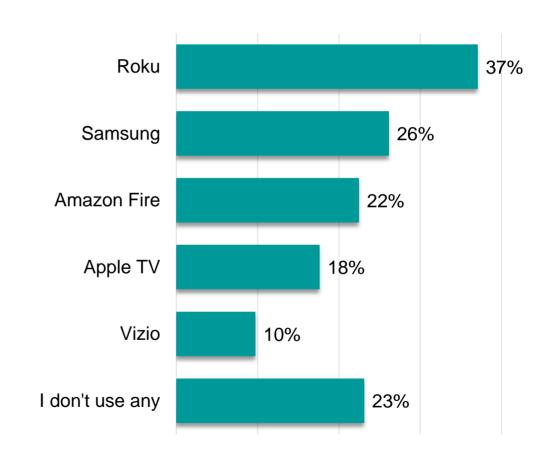
■ Neither agree nor disagree Strongly disagree Disagree Agree Strongly agree

U.S. Media Consumption

Streaming Platforms Used Weekly

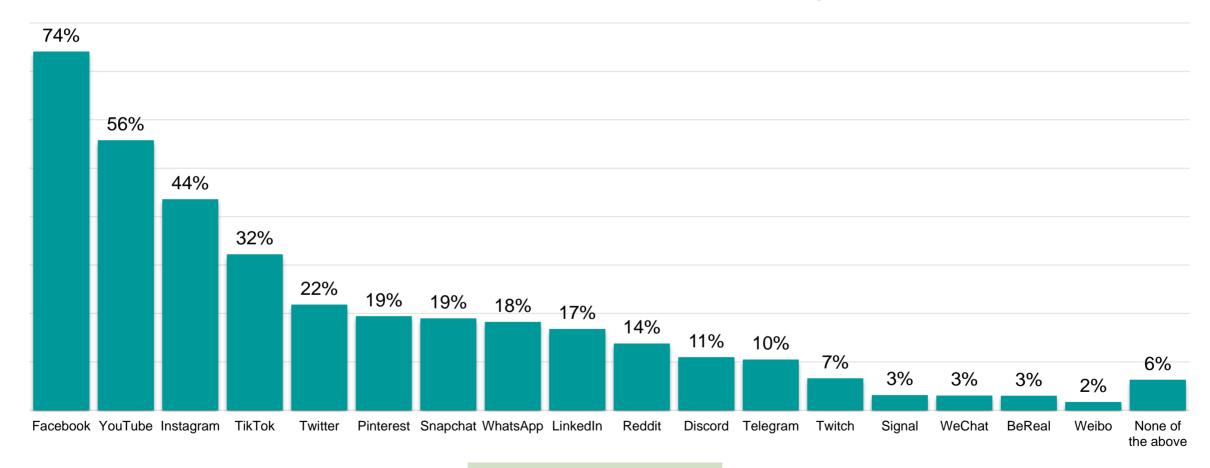


Connected Device Used



U.S. Media Consumption

Social Media Platforms Used Weekly



U.S. Media Consumption

Travel Destination Source of Awareness

Friends/Family	42%
Online	31%
Social Media	38%
TV commercials	29%
YouTube	32%
TV Program/Documentary	20%
Email	17%
Radio	8%
Newspaper	10%
Out of home advertising (e.g. Poster Billboards, bus shelter advertisements, etc.)	7%
I don't recall	14%

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	32%
I go to the destination's website	30%
I look up the destination on social media	22%
I book travel to the destination almost immediately	12%
I don't do anything	18%
None of the above	11%