



Vision Insights U.S. Traveler Profiles March 2025

April 30, 2025



STATE OF HAWAII • DEPARTMENT OF BUSINESS,
ECONOMIC DEVELOPMENT & TOURISM



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

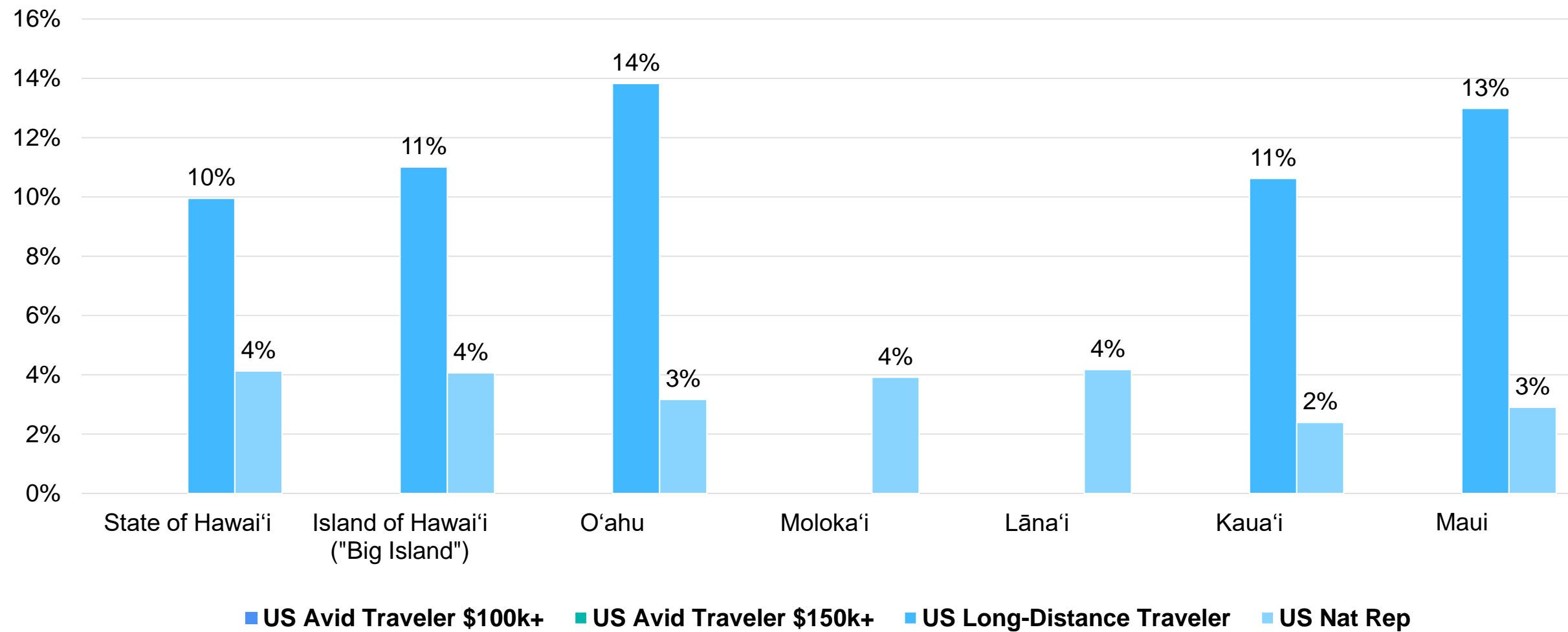
Avid Traveler \$150k+

- 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

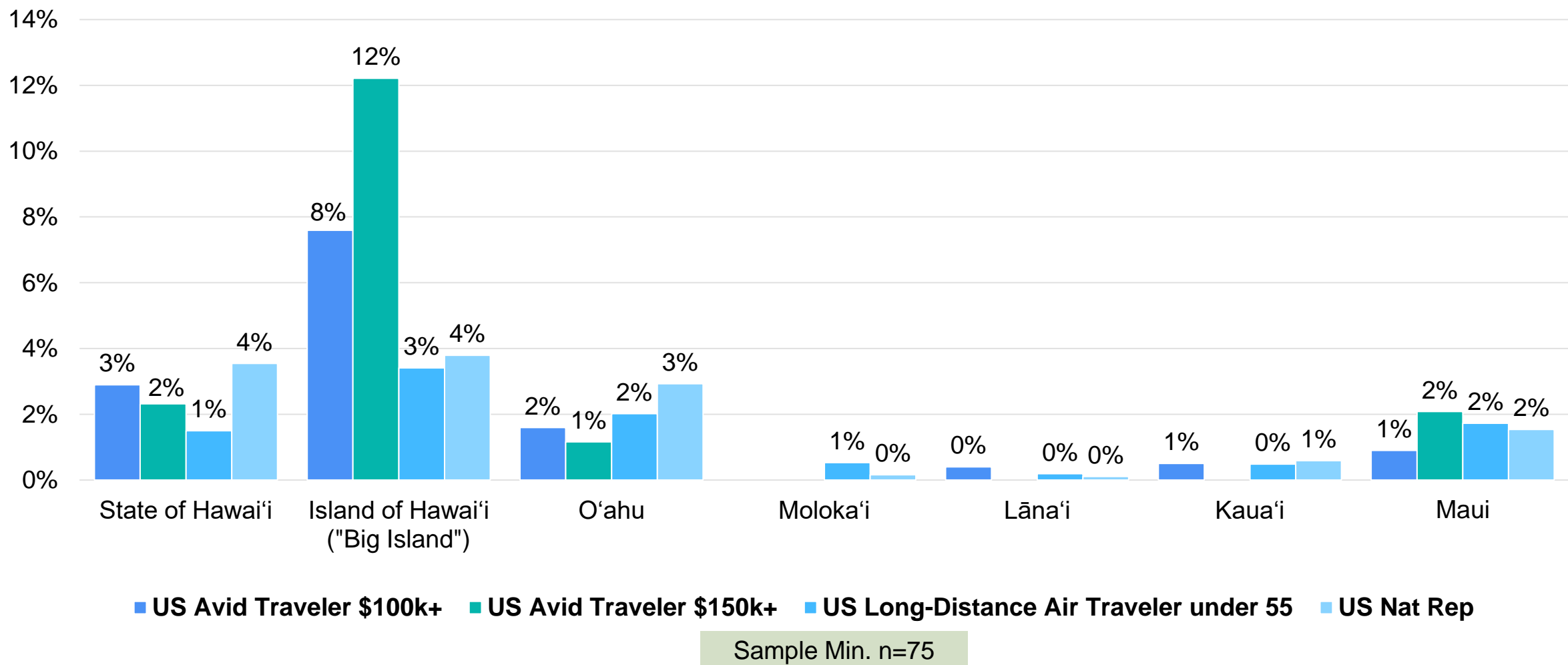
U.S. - Leisure Trip In Past 12 Months



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



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	21.6%	Texas	8.1%	New York	12.4%	Texas	8.1%
California	9.7%	New York	8.1%	Texas	9.6%	New York	8.1%
Texas	8.8%	Florida	7.8%	Florida	6.8%	Florida	7.8%
Pennsylvania	8.4%	Pennsylvania	6.7%	Georgia	6.6%	Pennsylvania	6.7%
Florida	4.3%	California	5.0%	Illinois	6.0%	California	5.0%
Georgia	3.4%	Illinois	4.0%	Pennsylvania	5.6%	Ohio	4.7%
Washington	2.3%	Virginia	3.6%	California	5.2%	North Carolina	4.7%
Illinois	2.3%	New Jersey	2.5%	Virginia	3.9%	Georgia	4.5%
Minnesota	0.8%	Washington	1.0%	Washington	1.4%	Illinois	4.0%
Virginia	0.4%	Colorado	0.7%	Minnesota	1.0%	Virginia	3.6%
Sample Size: n=178		n=77		n=401		n=1,910	

Sample Size:

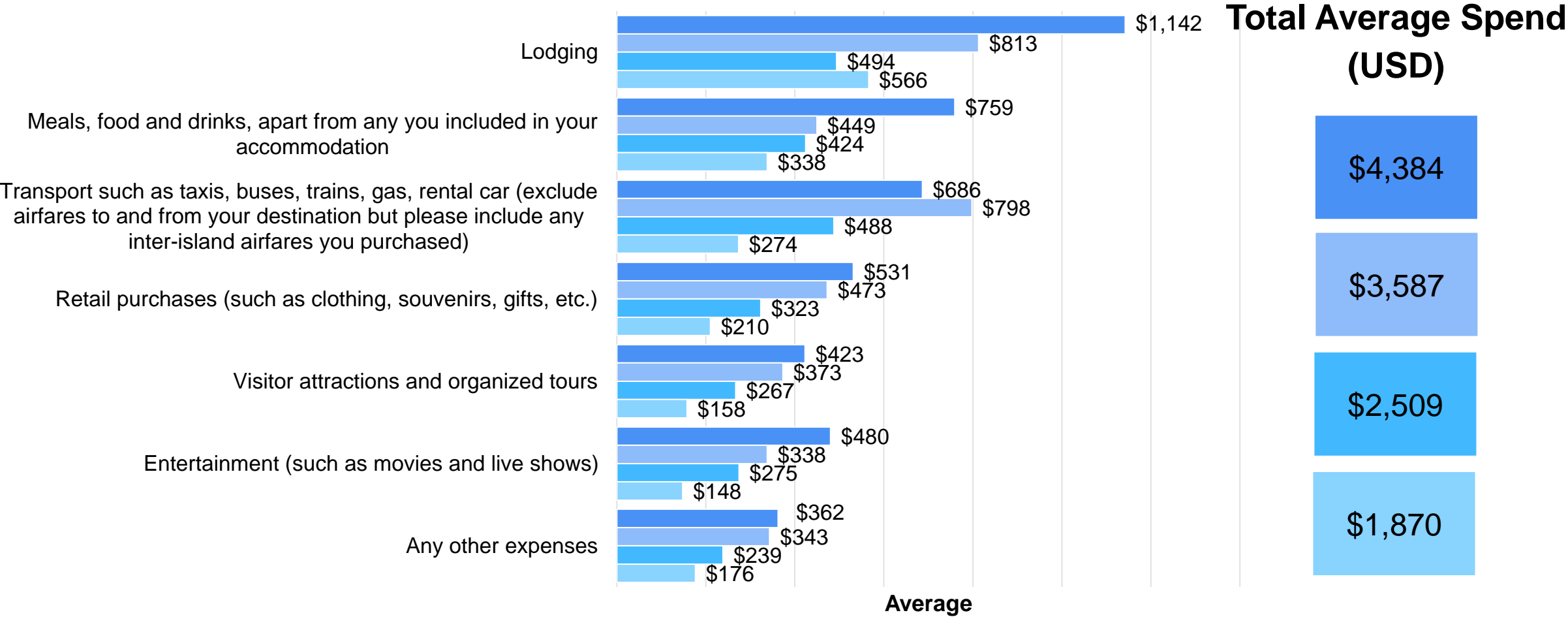
n=178

n=77

n=401

n=1,910

U.S. - Total Annual Holiday Spend

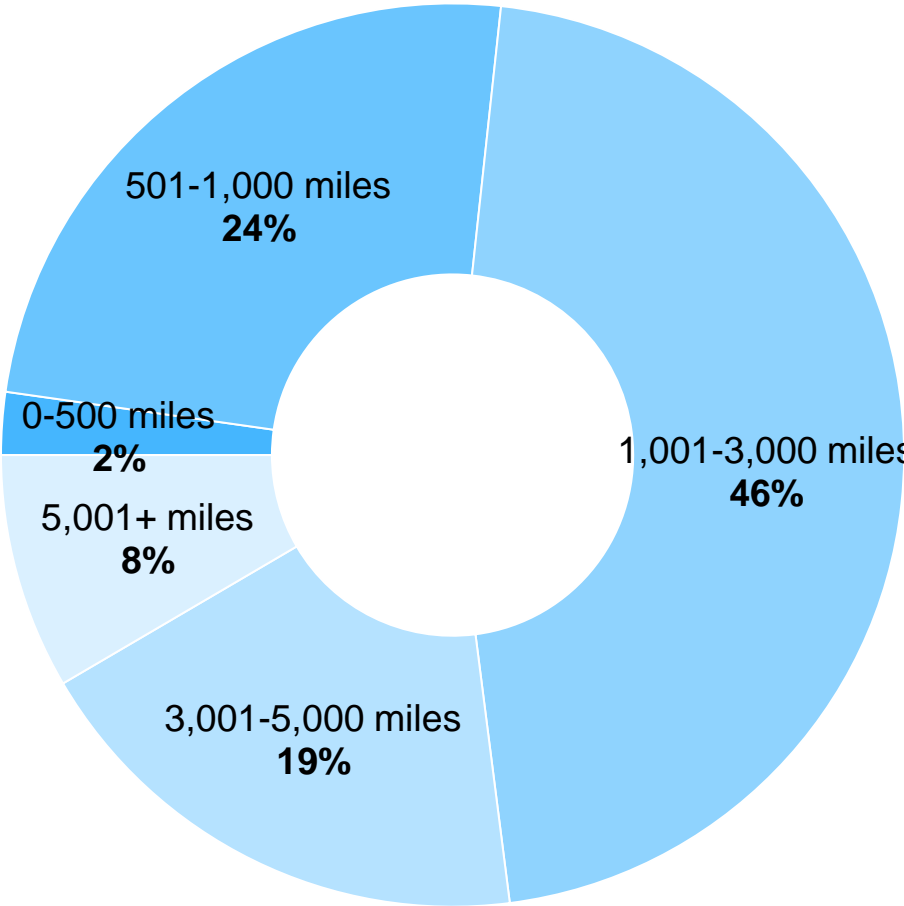


■ US Avid Traveler \$100k+ ■ US Avid Traveler \$150k+ ■ US Long-Distance Air Traveler under 55 ■ US Nat Rep

Sample Size: n=178 n=77 n=401 n=1,910

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

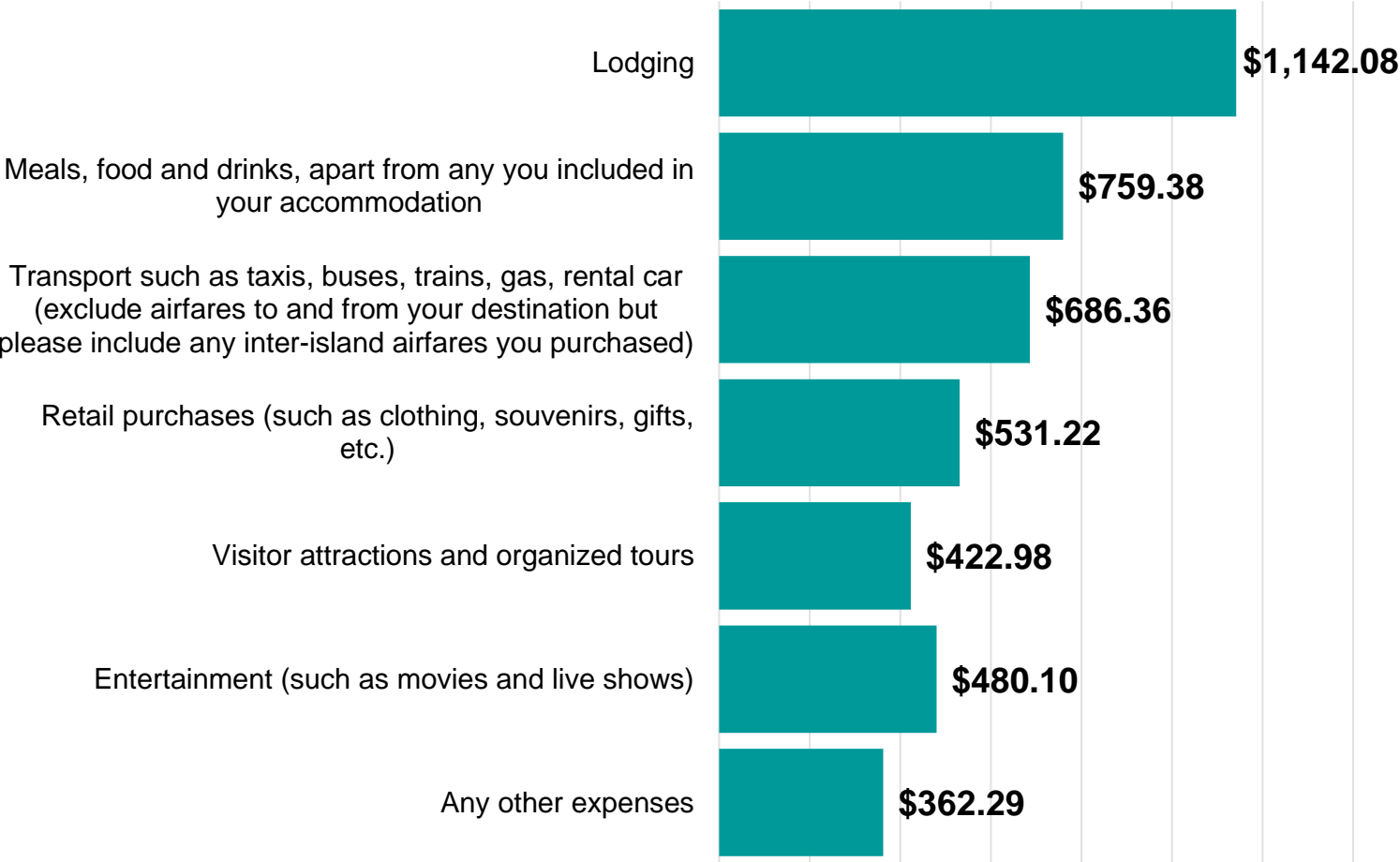
Distance Travelled on Annual Vacation



Sample Size: n=178

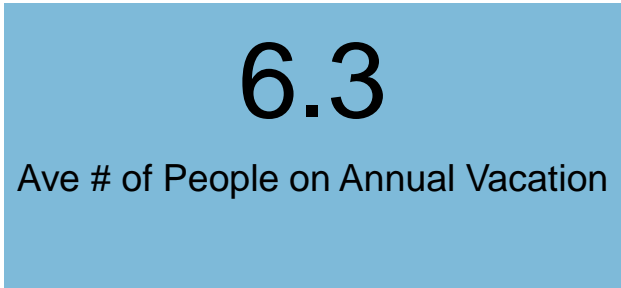
U.S. Avid Travelers \$100k+: Annual Vacation

Average Spend



Sample Size: n=178

Spend Per Person Per Day

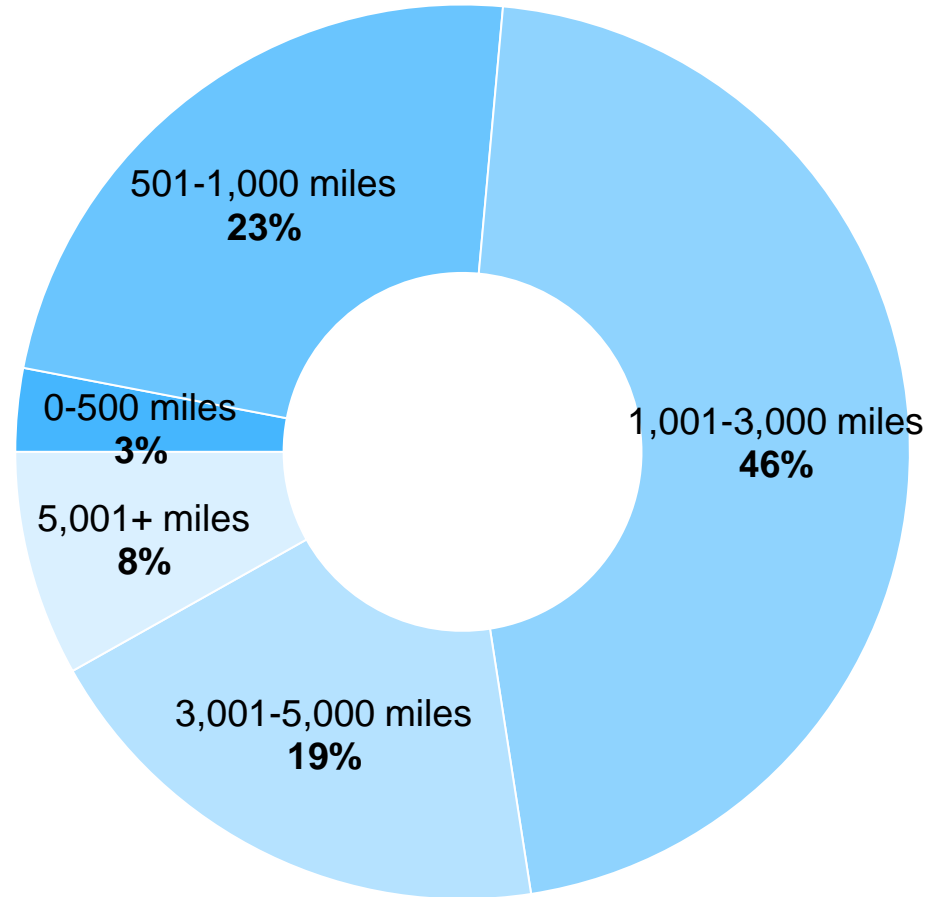


\$83.68

Ave. Per Person Per Day Spend

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

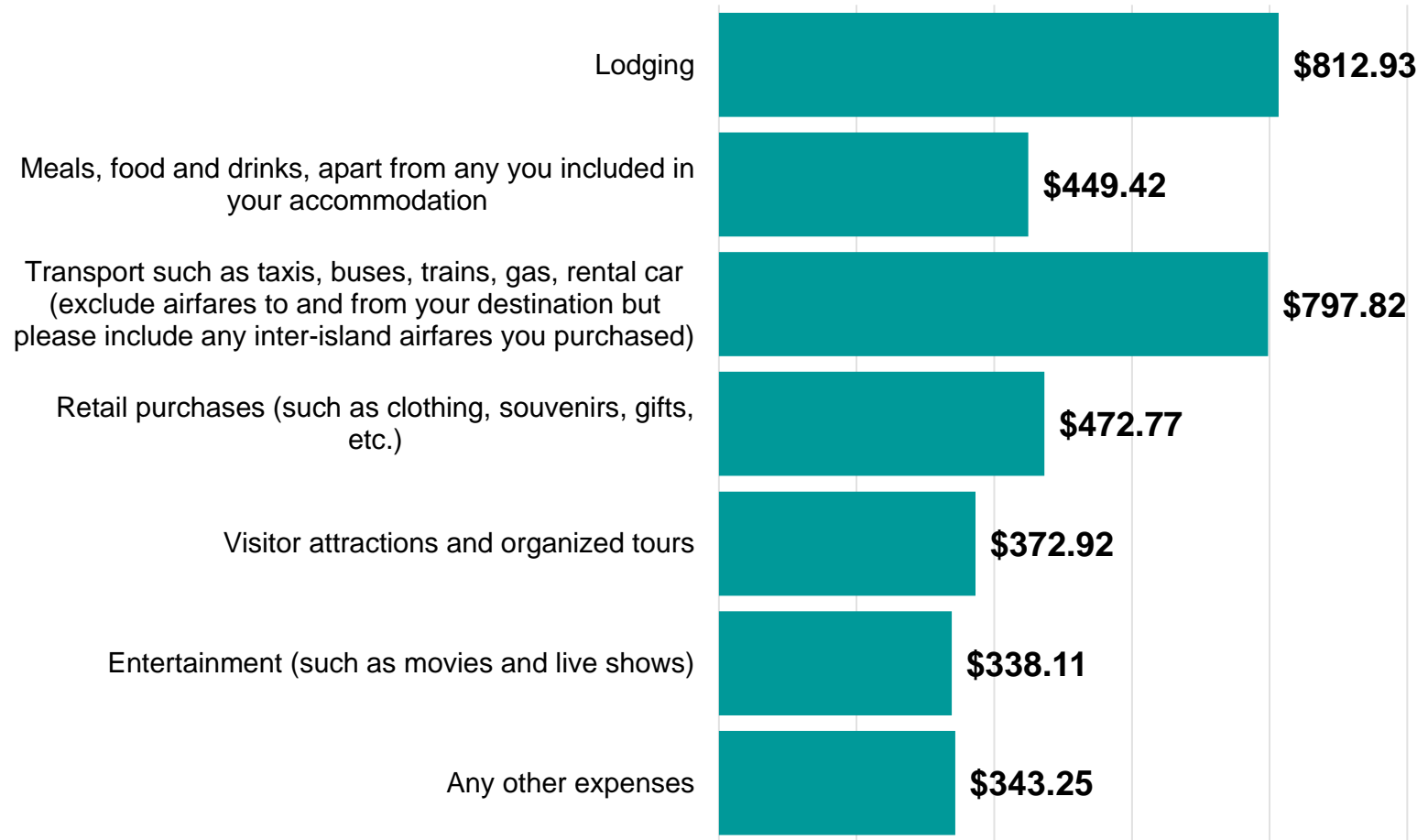
Distance Travelled on Annual Vacation



Sample Size: n=77

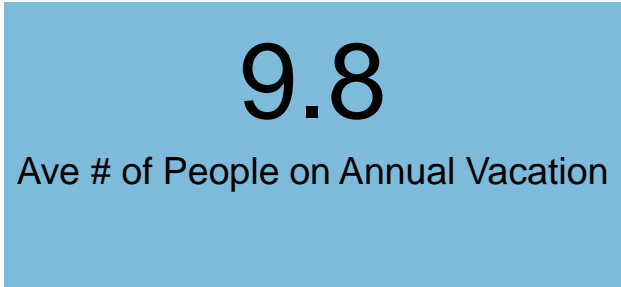
U.S. Avid Travelers \$150k+: Annual Vacation

Average Spend



Sample Size: n=77

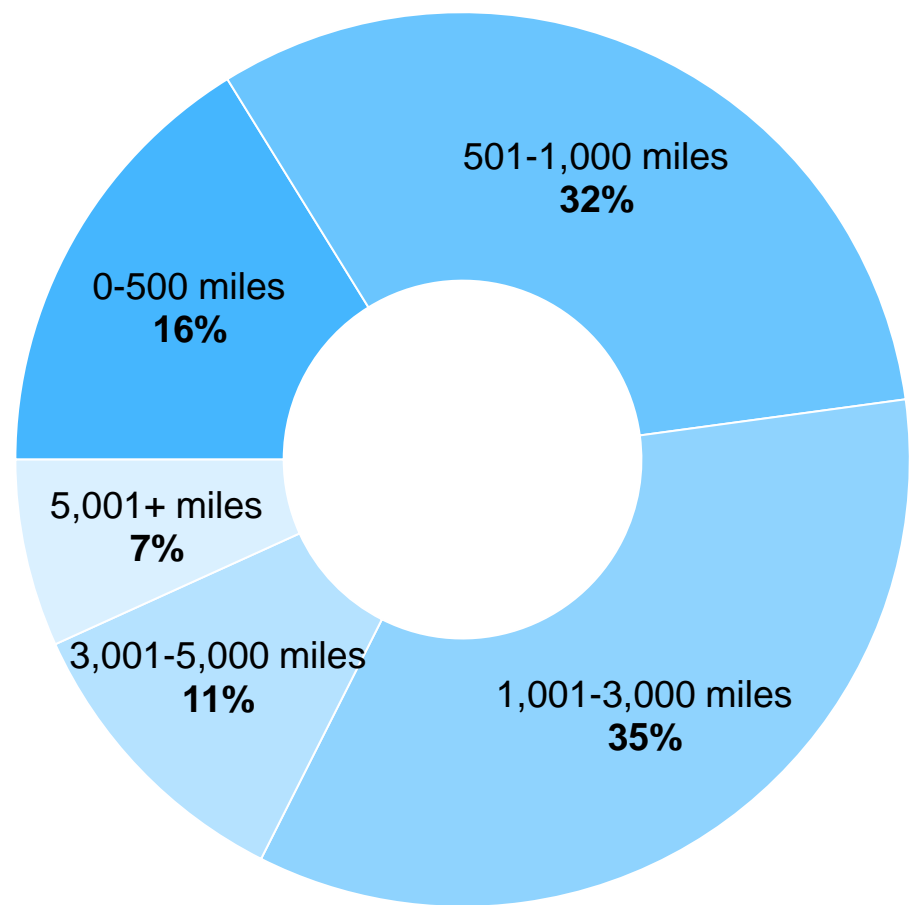
Spend Per Person Per Day



Ave. Per Person Per Day Spend

U.S. Long-Distance Travelers: Annual Vacation

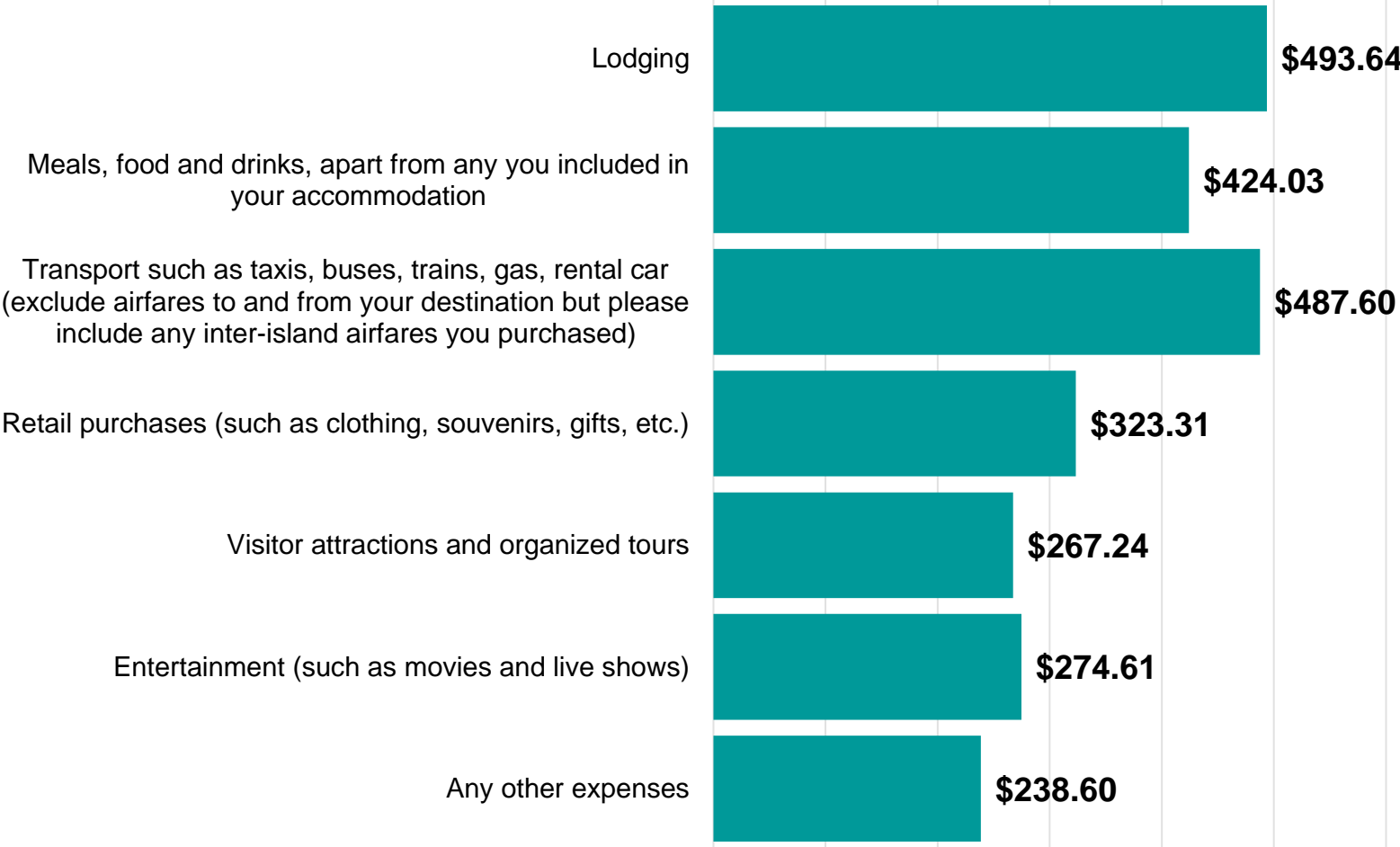
Distance Travelled on Annual Vacation



Sample Size: n=401

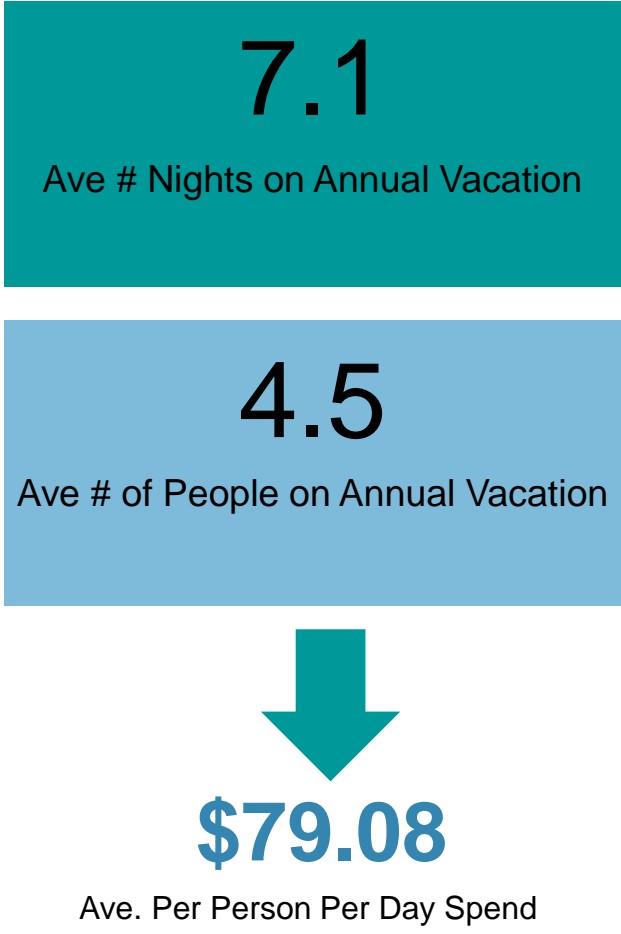
U.S. Long-Distance Travelers: Annual Vacation

Average Spend



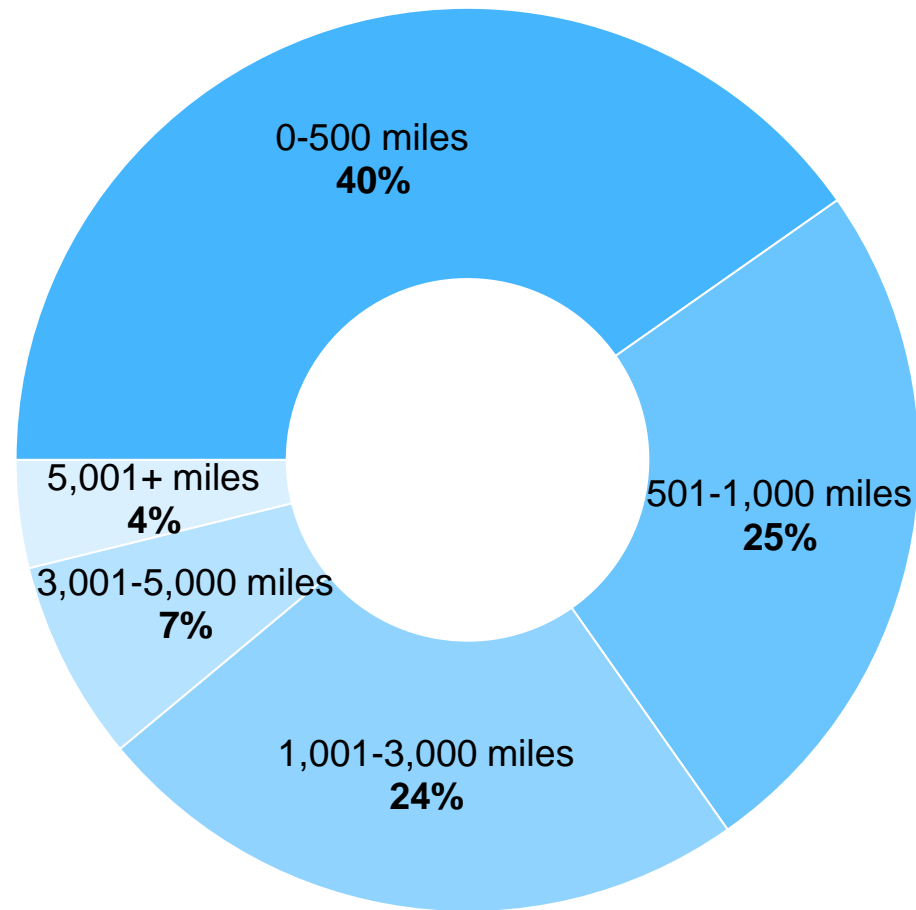
Sample Size: n=401

Spend Per Person Per Day



U.S. Nat Rep: Annual Vacation

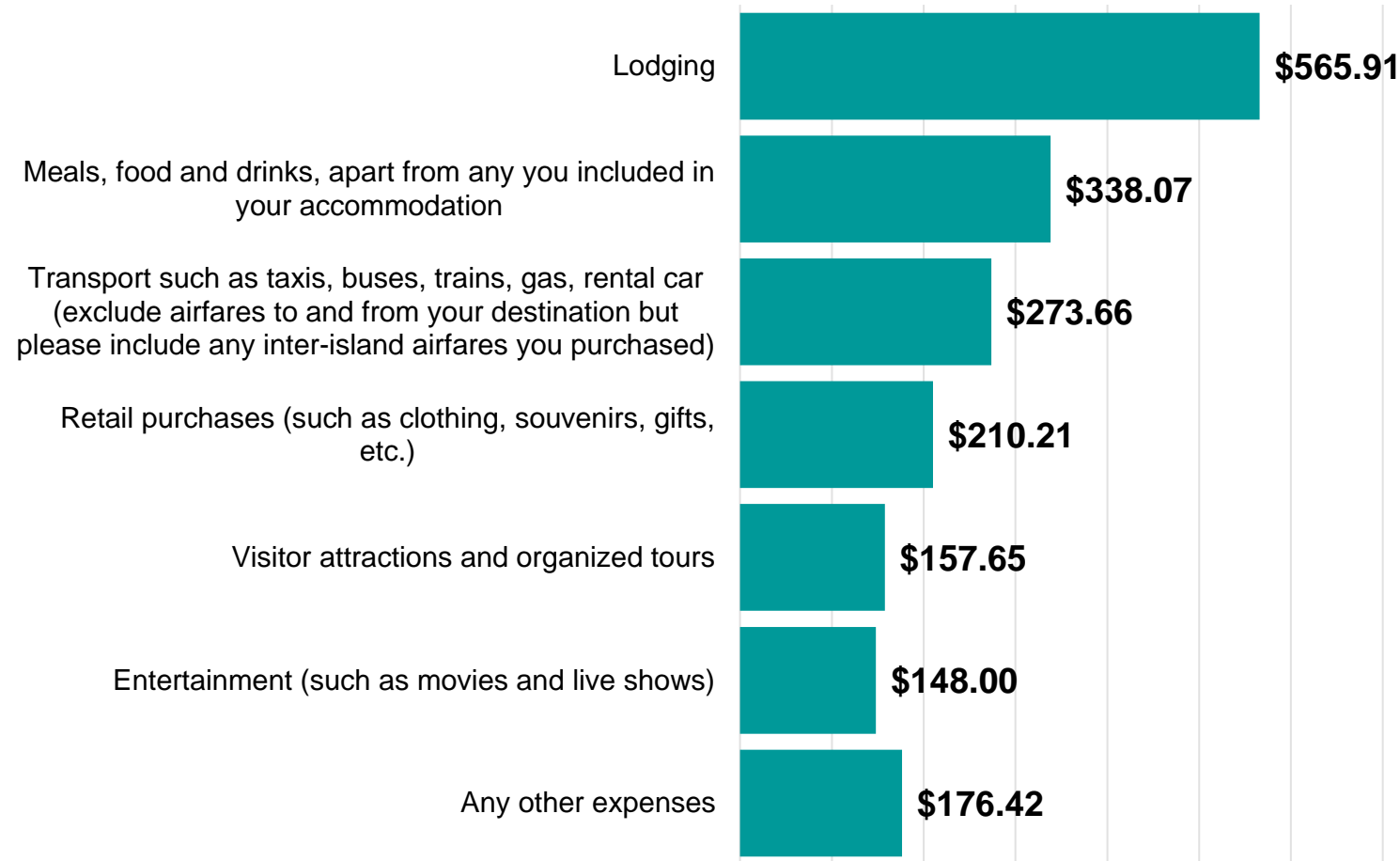
Distance Travelled on Annual Vacation



Sample Size: n=1,910

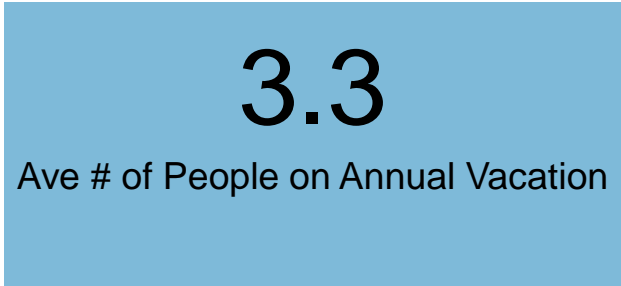
U.S. Nat Rep: Annual Vacation

Average Spend



Sample Size: n=1,910

Spend Per Person Per Day



\$101.53
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	56%	53%	45%	49%
Value for money	53%	53%	50%	54%
Entertainment and nightlife	41%	40%	40%	27%
Consideration of sustainable principles	49%	49%	40%	28%
Natural attractions/activities	55%	55%	46%	42%
Cultural attractions	47%	43%	40%	35%
Opportunity to experience local restaurants/businesses	44%	40%	40%	38%
Family-friendly location and activities	54%	61%	45%	40%
Safe and Secure Destination	55%	51%	56%	59%

Sample Size:

n=178

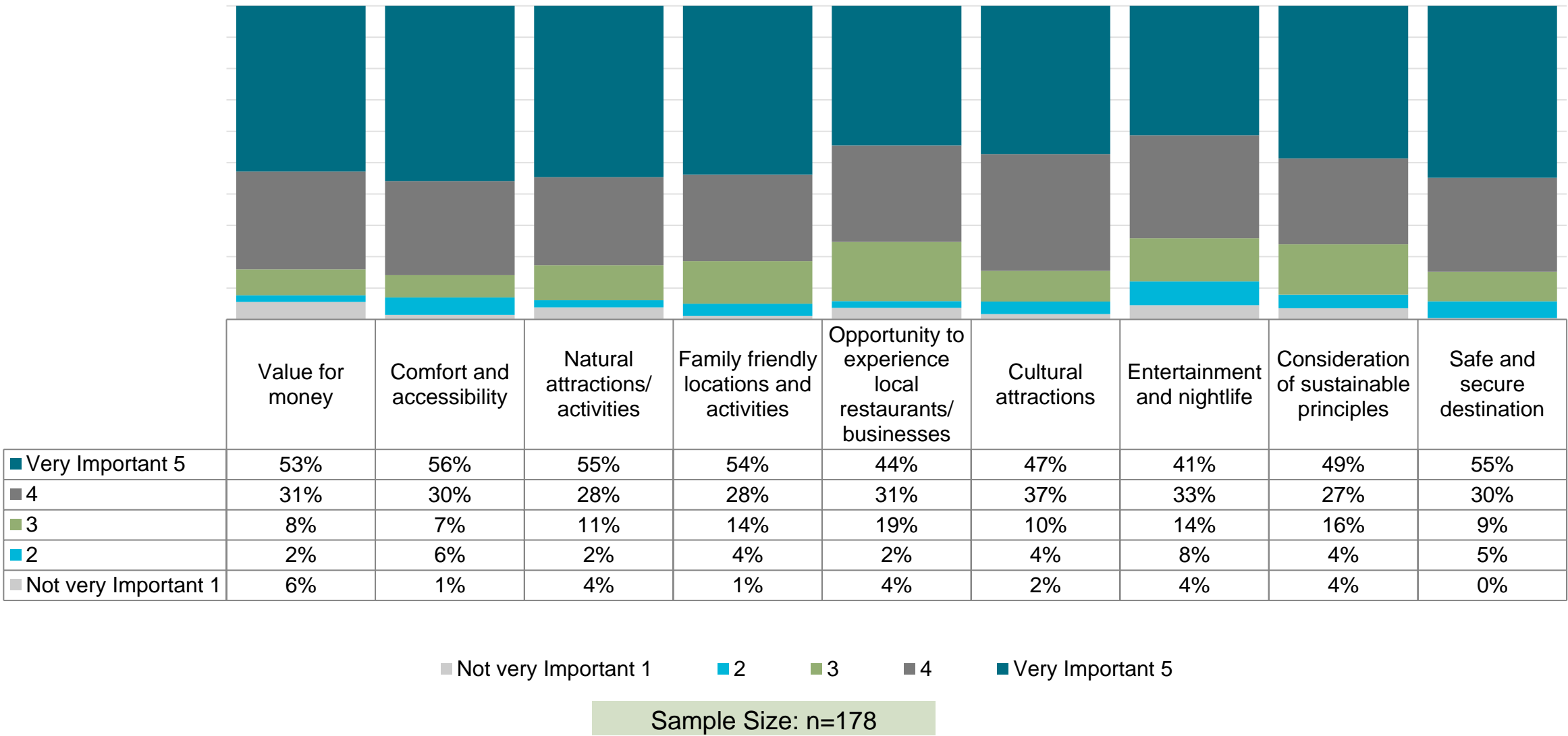
n=77

n=401

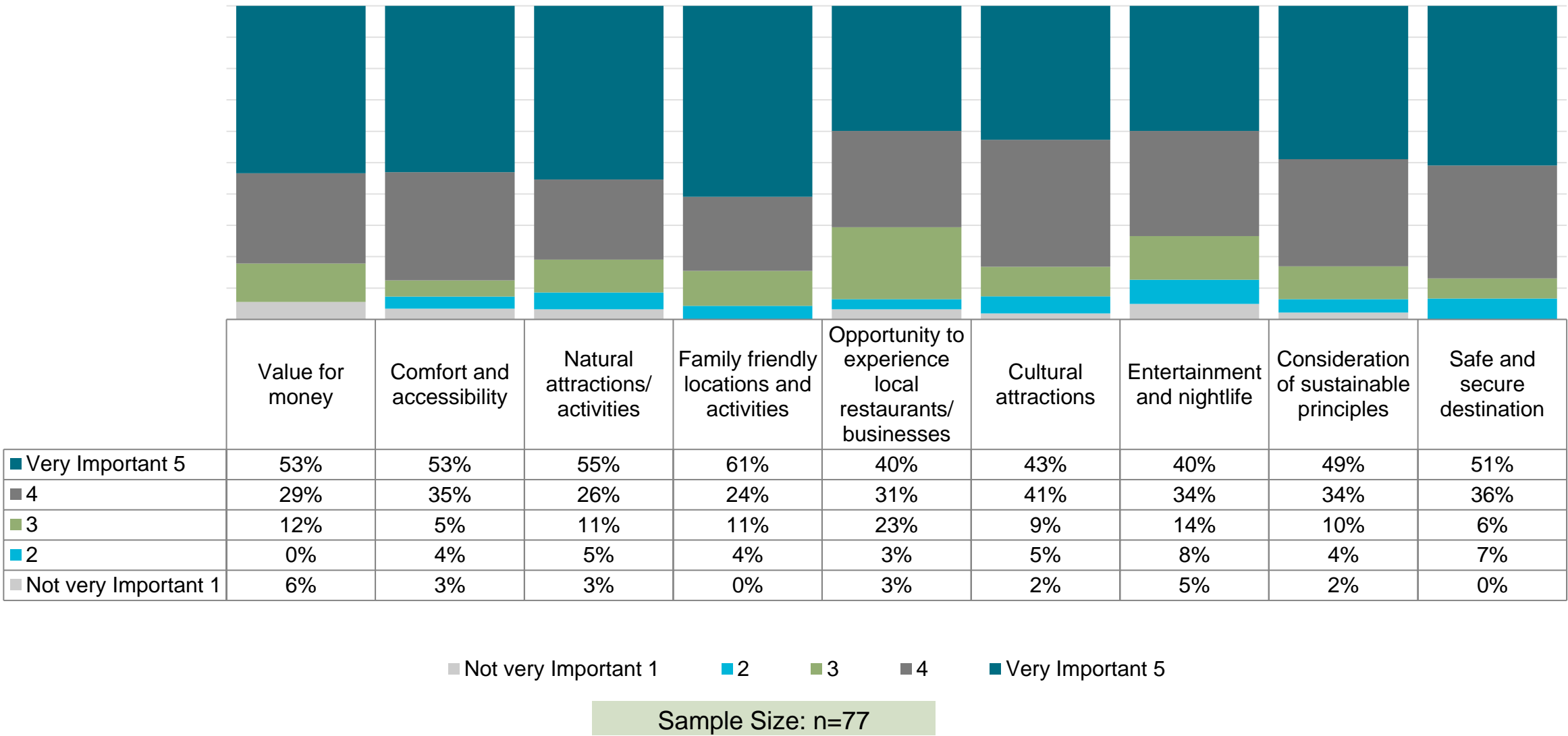
n=1,910

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?

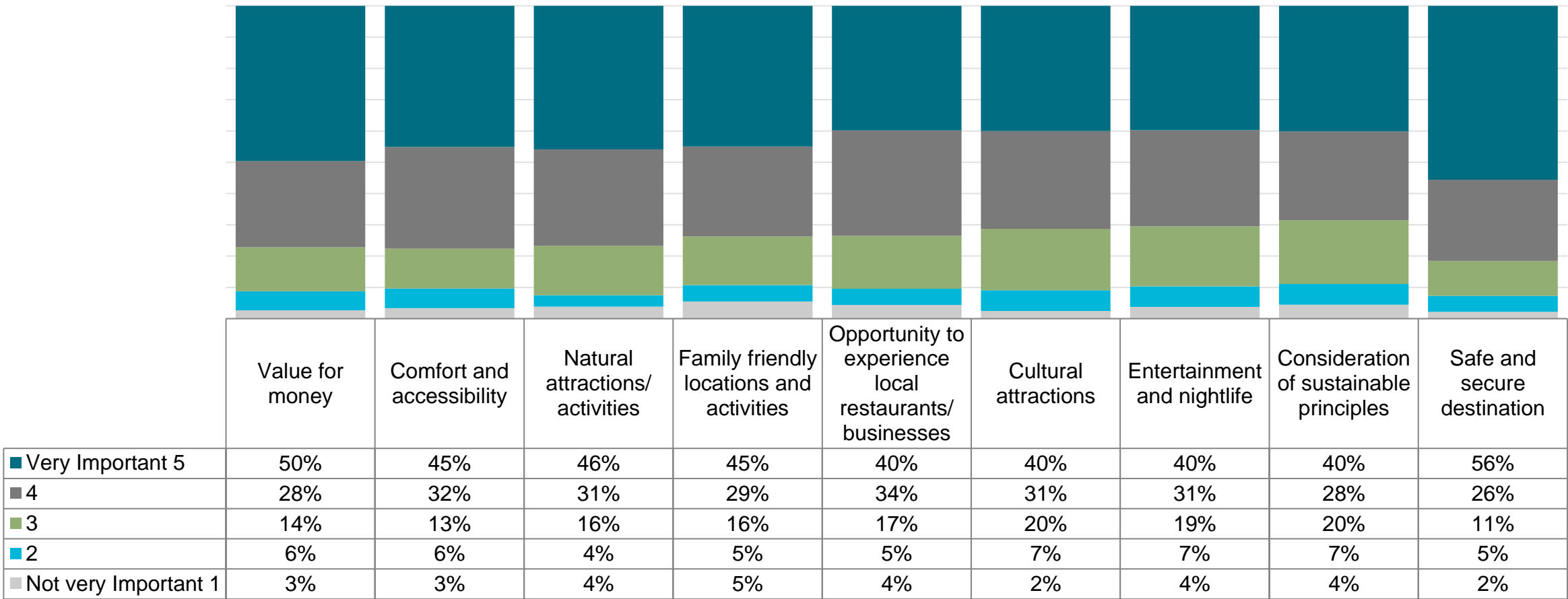
U.S. Avid Travelers \$100k+: Importance of Travel Factors



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



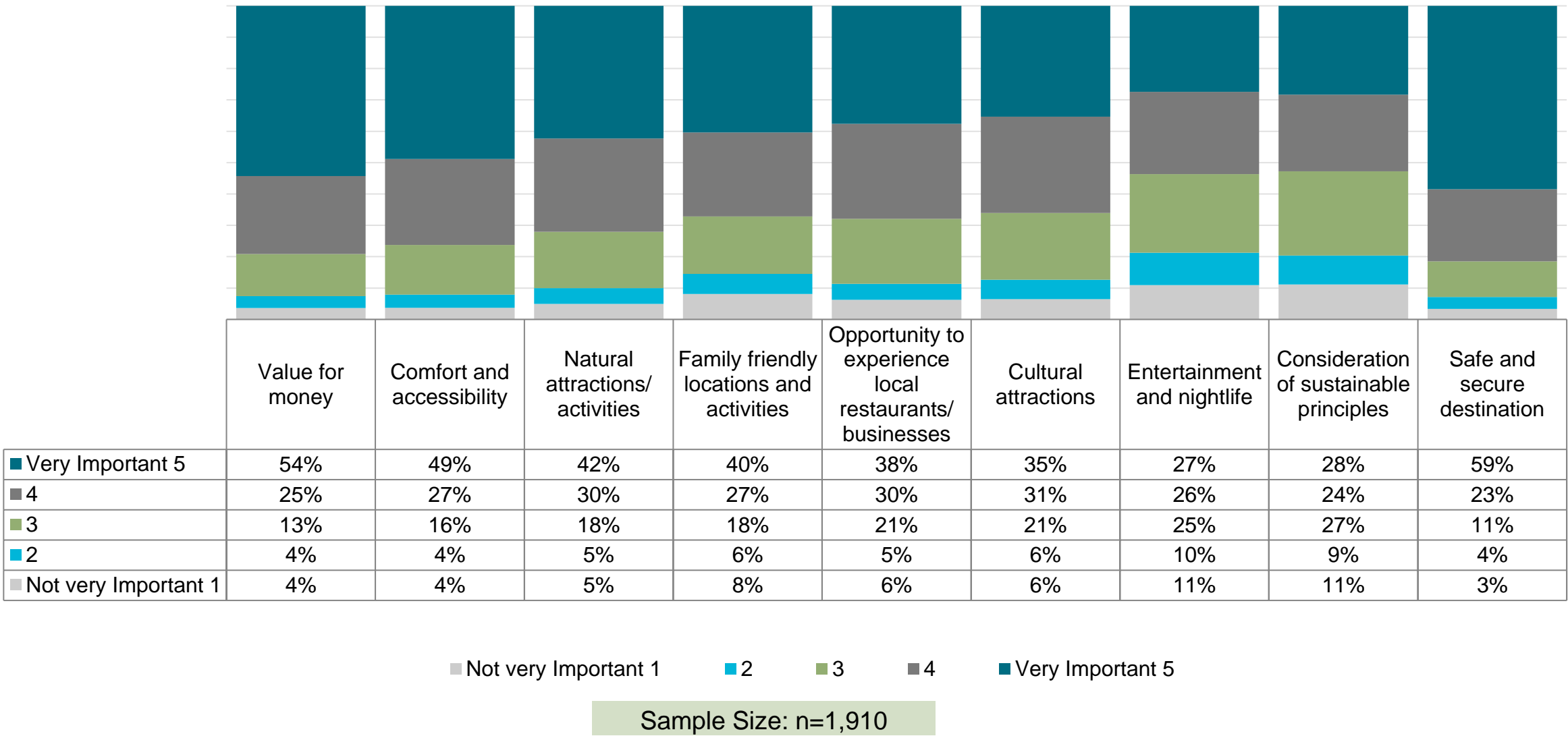
U.S. Long Distance Travelers: Importance of Travel Factors



Not very Important 1 2 3 4 Very Important 5

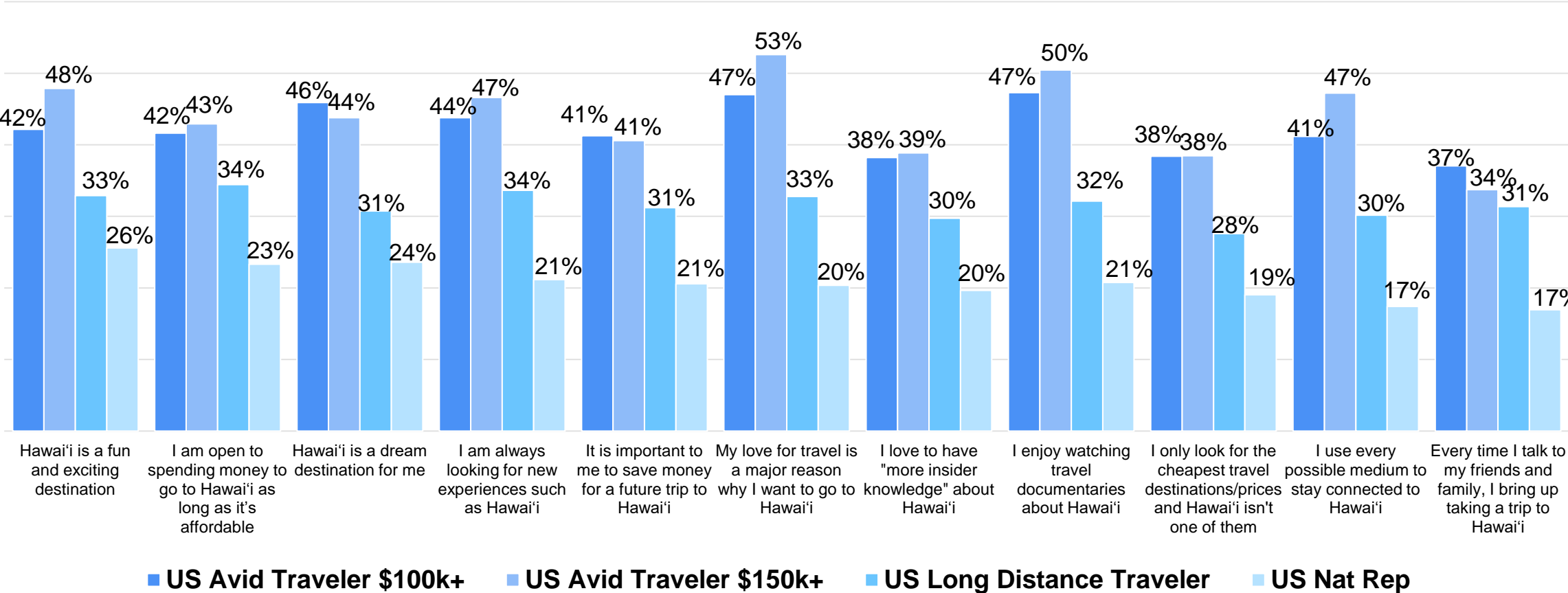
Sample Size: n=401

U.S. Nat Rep: Importance of Travel Factors



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

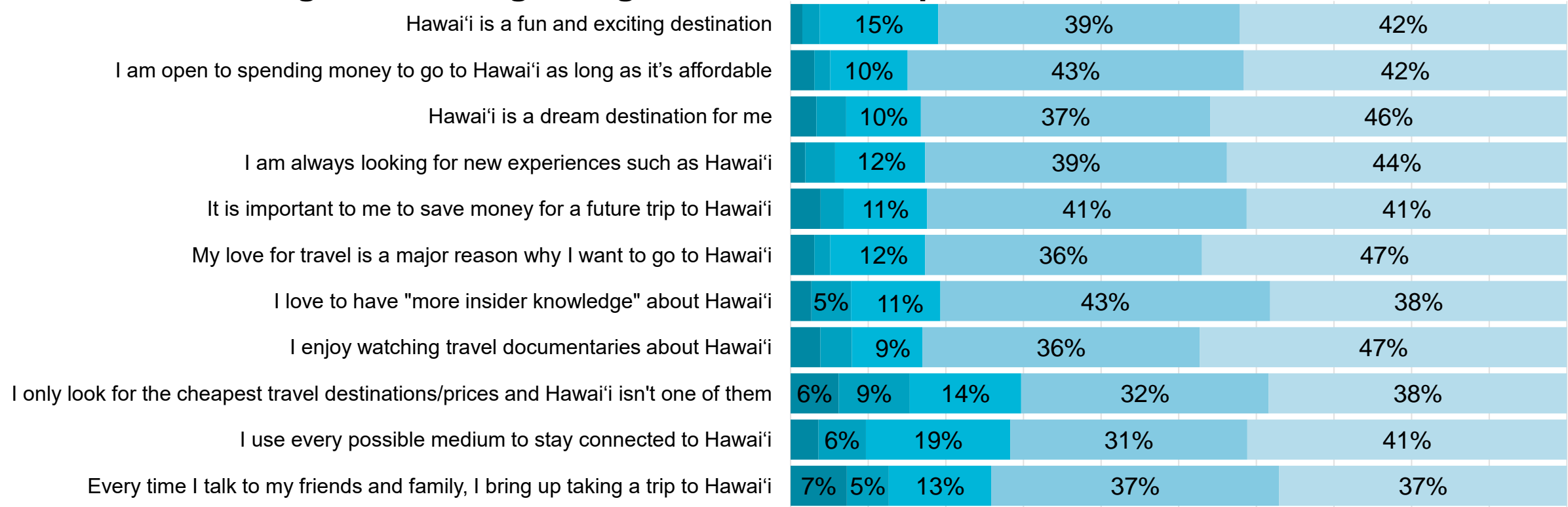
Agreement Regarding Hawai'i as a Travel Destination (Strongly Agree)



Sample Size: n=178 n=77 n=401 n=1,910

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

Agreement Regarding Hawai'i as an Aspirational Destination

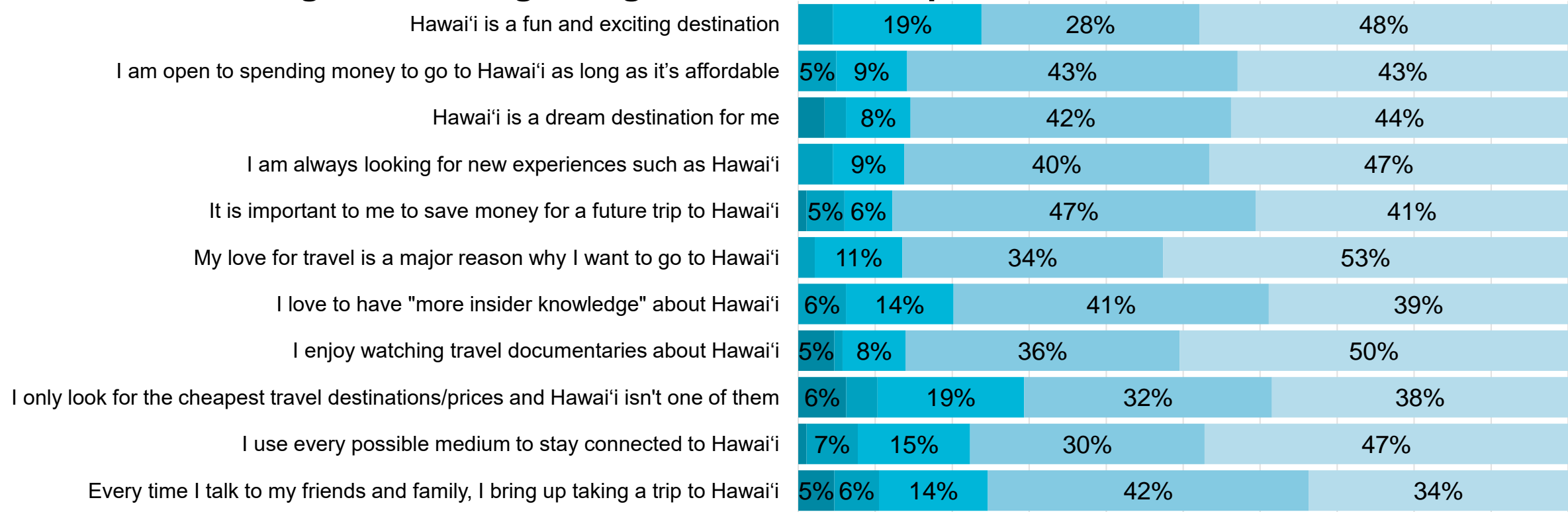


■ Strongly disagree ■ Disagree ■ Neither agree nor disagree ■ Agree ■ Strongly agree

Sample Size: n=178

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

Agreement Regarding Hawai'i as an Aspirational Destination

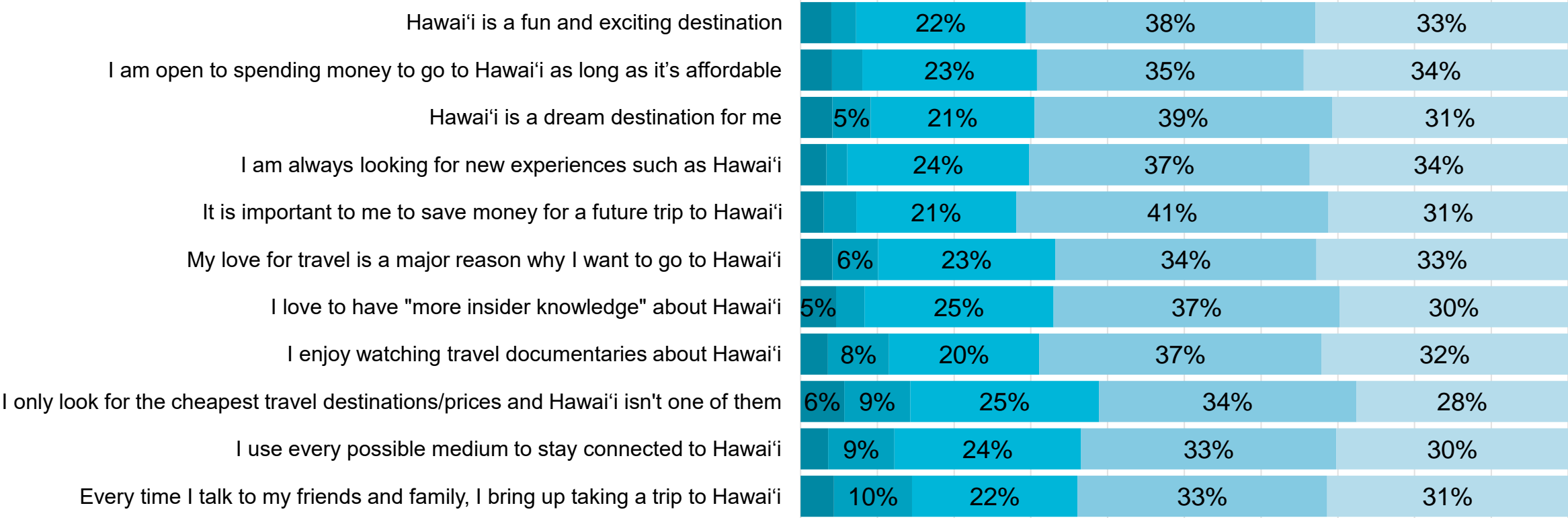


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U.S. Long Distance Traveler: Hawai'i as an Aspirational Destination

Agreement Regarding Hawai'i as an Aspirational Destination

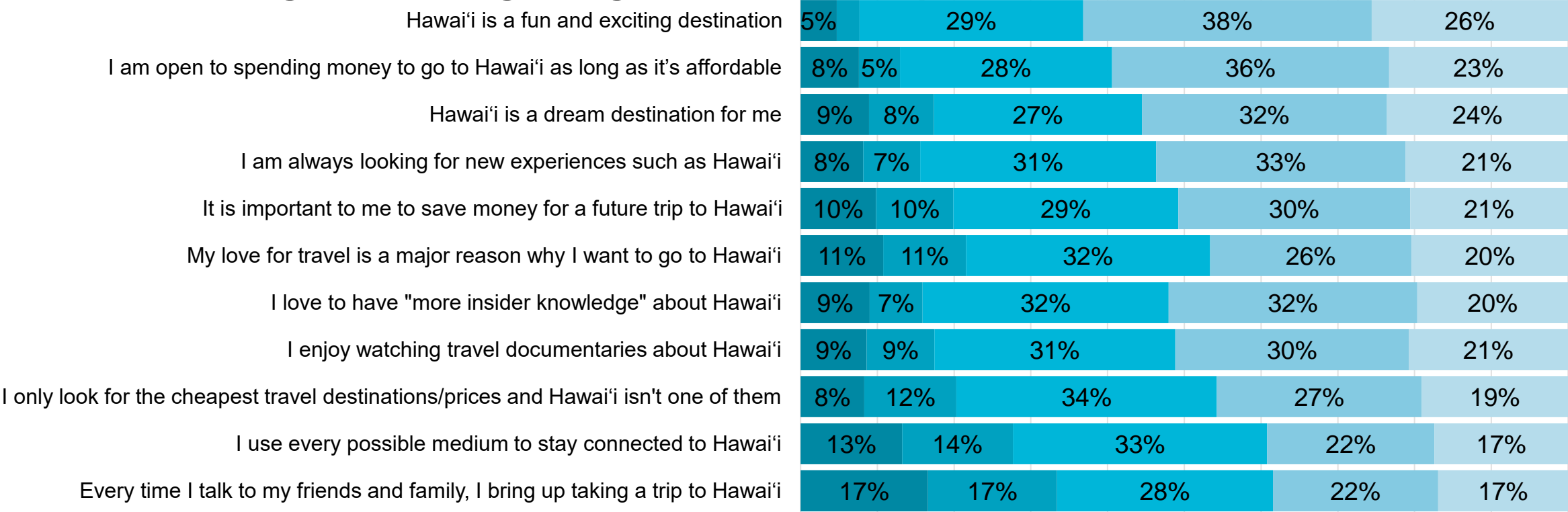


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U.S. Nat Rep: Hawai'i as an Aspirational Destination

Agreement Regarding Hawai'i as an Aspirational Destination

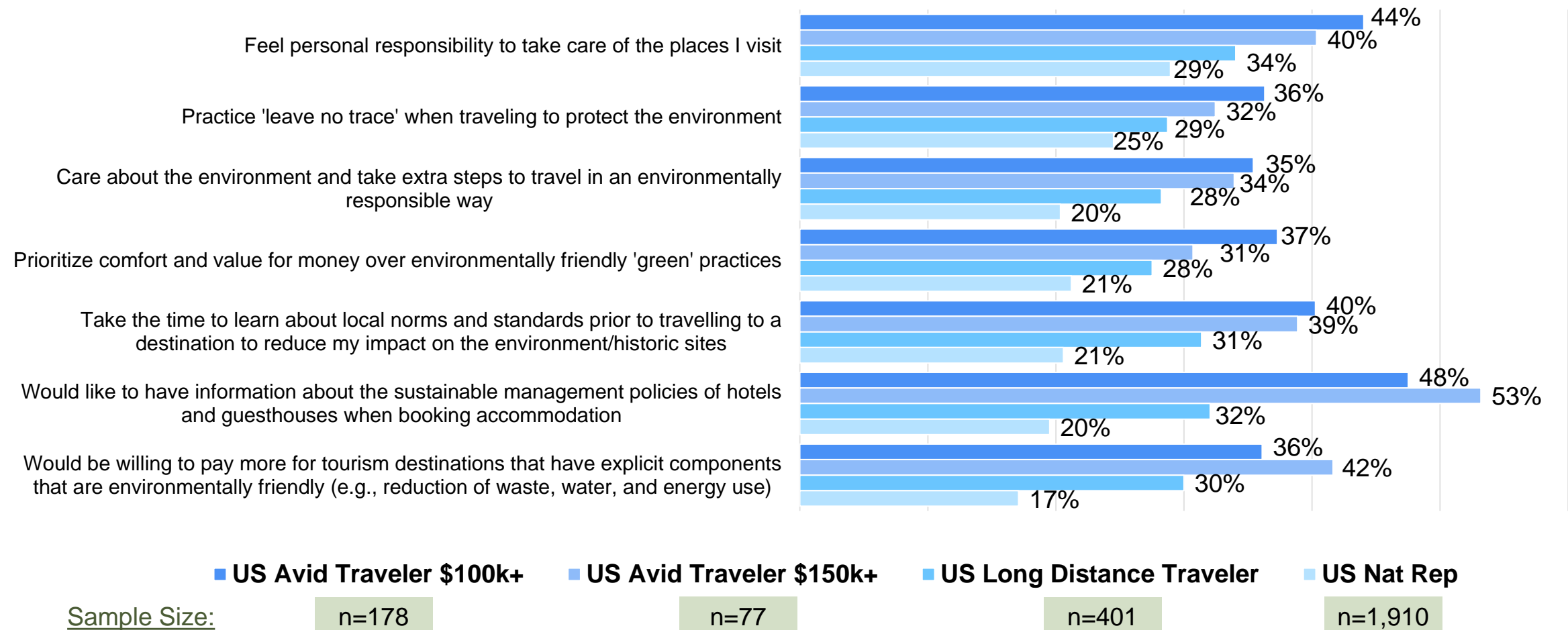


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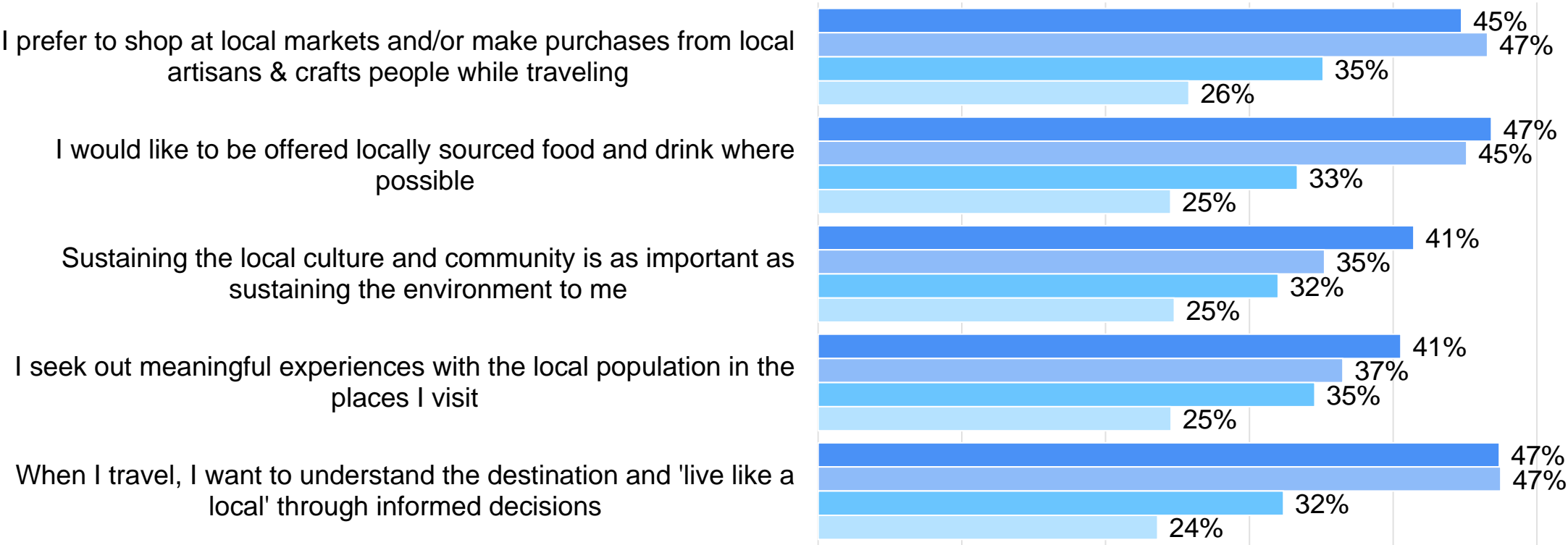
U.S. - Sustainability and Travel Responsibility Statements

Agreement Regarding Sustainable Practices While Traveling (Strongly Agree)



U.S. - Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling (Strongly Agree)

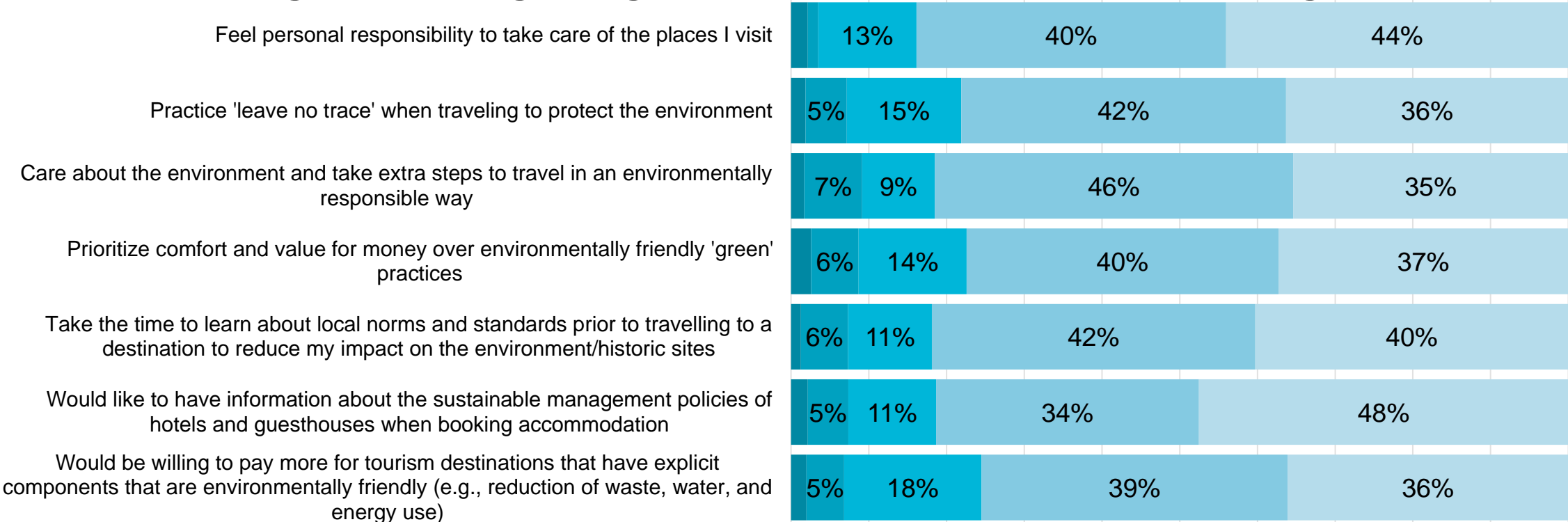


■ US Avid Traveler \$100k+ ■ US Avid Traveler \$150k+ ■ US Long Distance Traveler ■ US Nat Rep

Sample Size: n=178 n=77 n=401 n=1,910

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

Agreement Regarding Sustainable Practices While Traveling

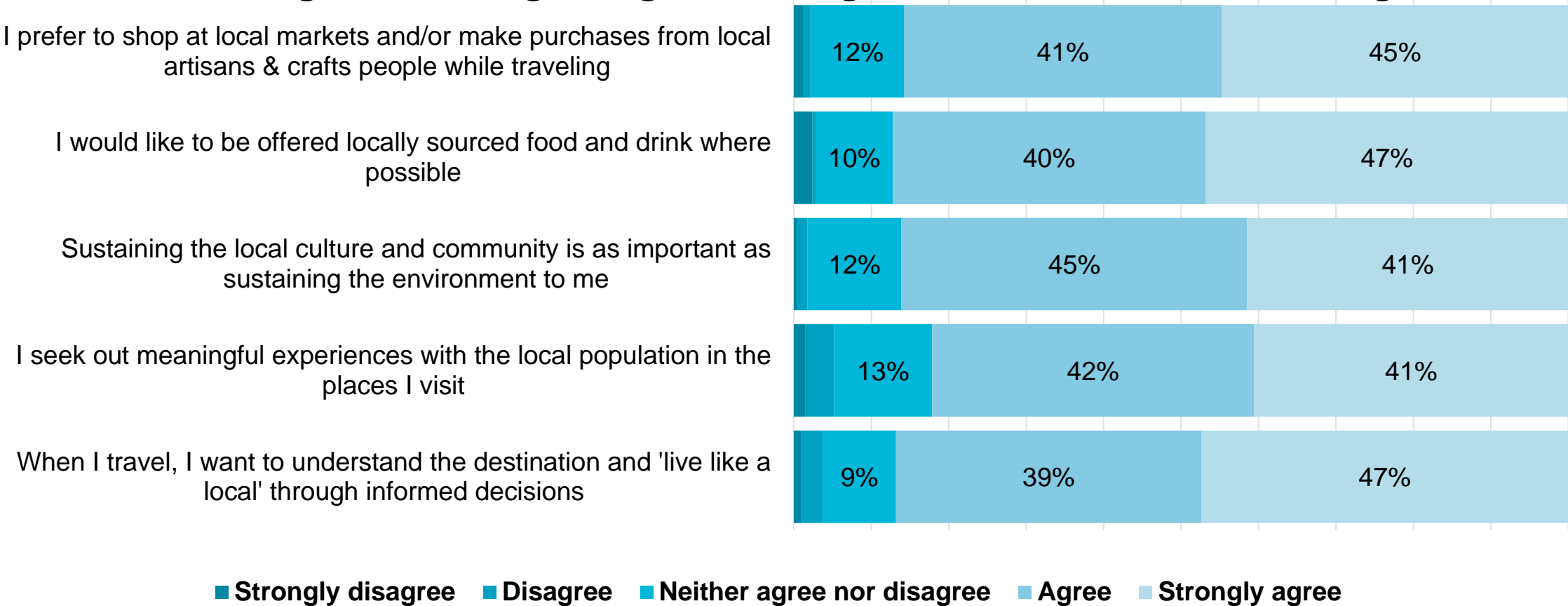


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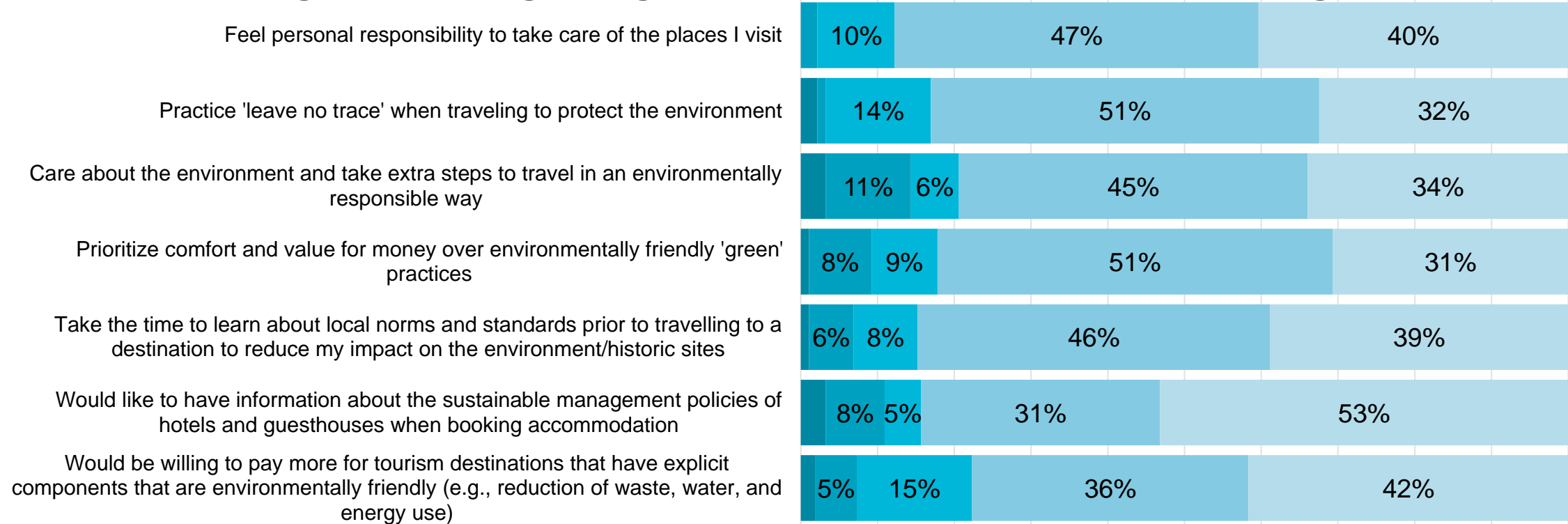
Agreement Regarding Sustaining Local Culture While Traveling



Sample Size: n=178

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

Agreement Regarding Sustainable Practices While Traveling

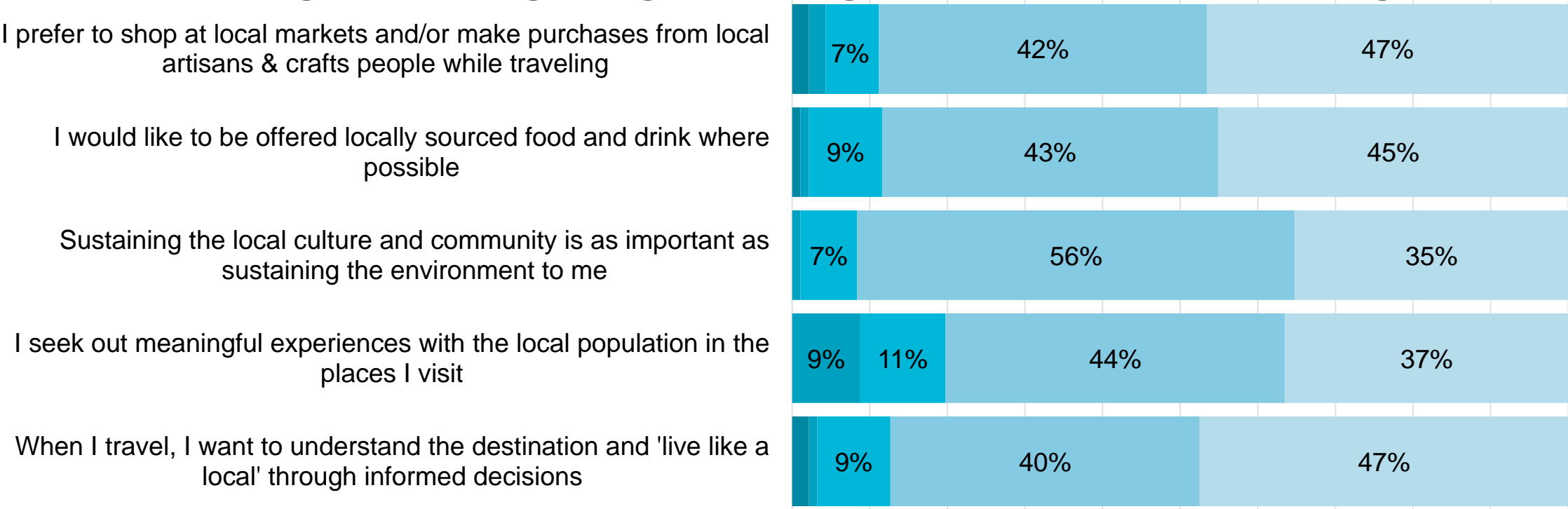


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U.S. Avid Travelers \$150k+: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling

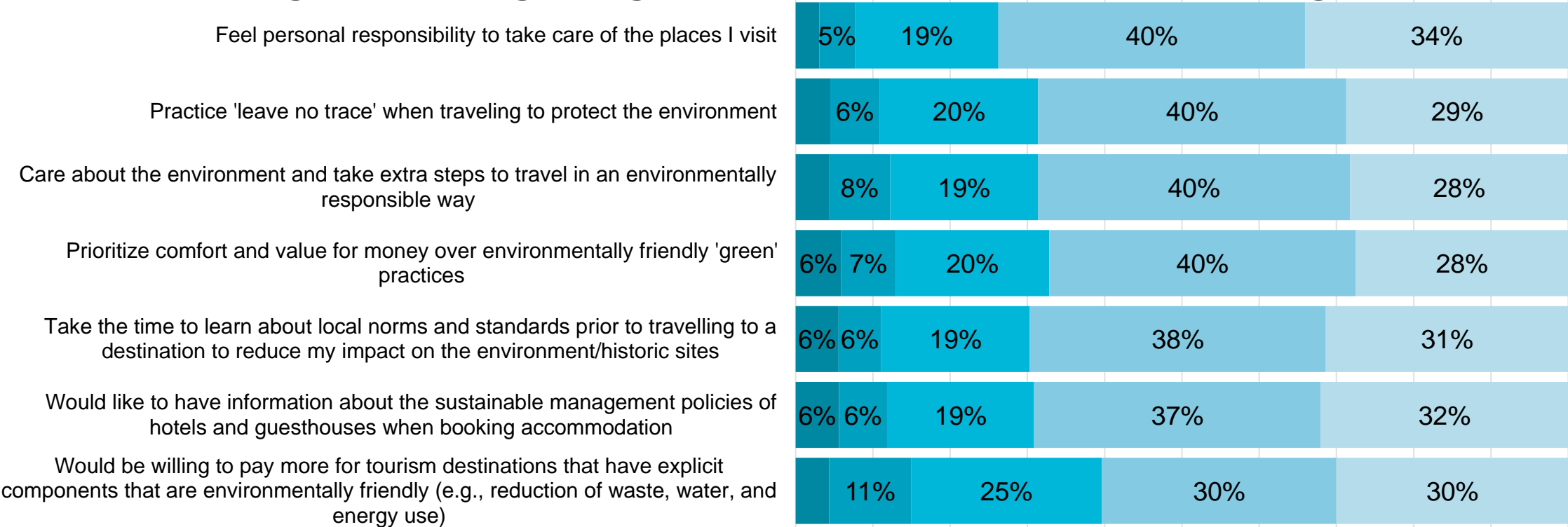


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U.S. Long Distance Traveler: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustainable Practices While Traveling

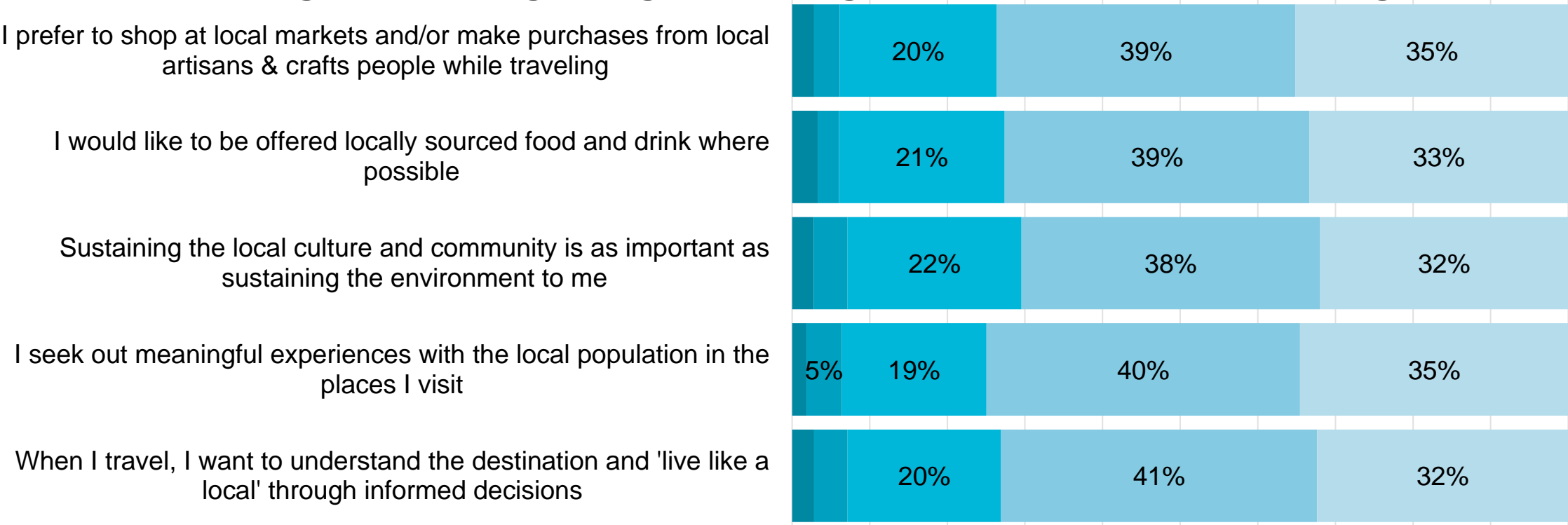


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U.S. Long Distance Traveler: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling

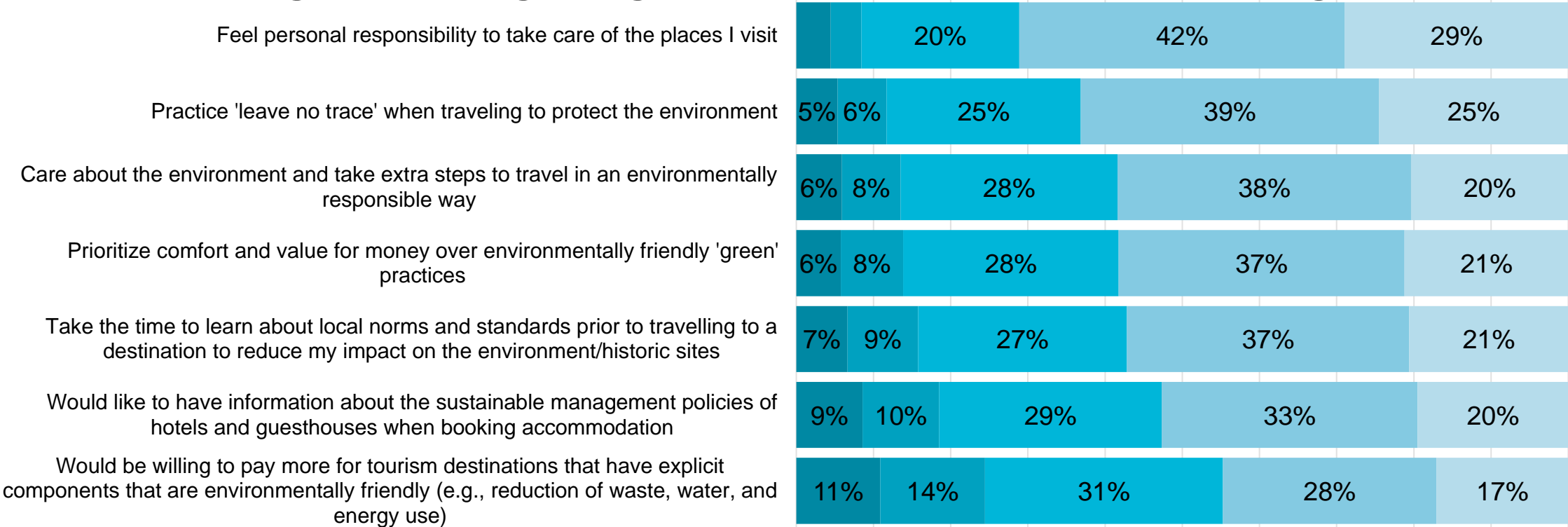


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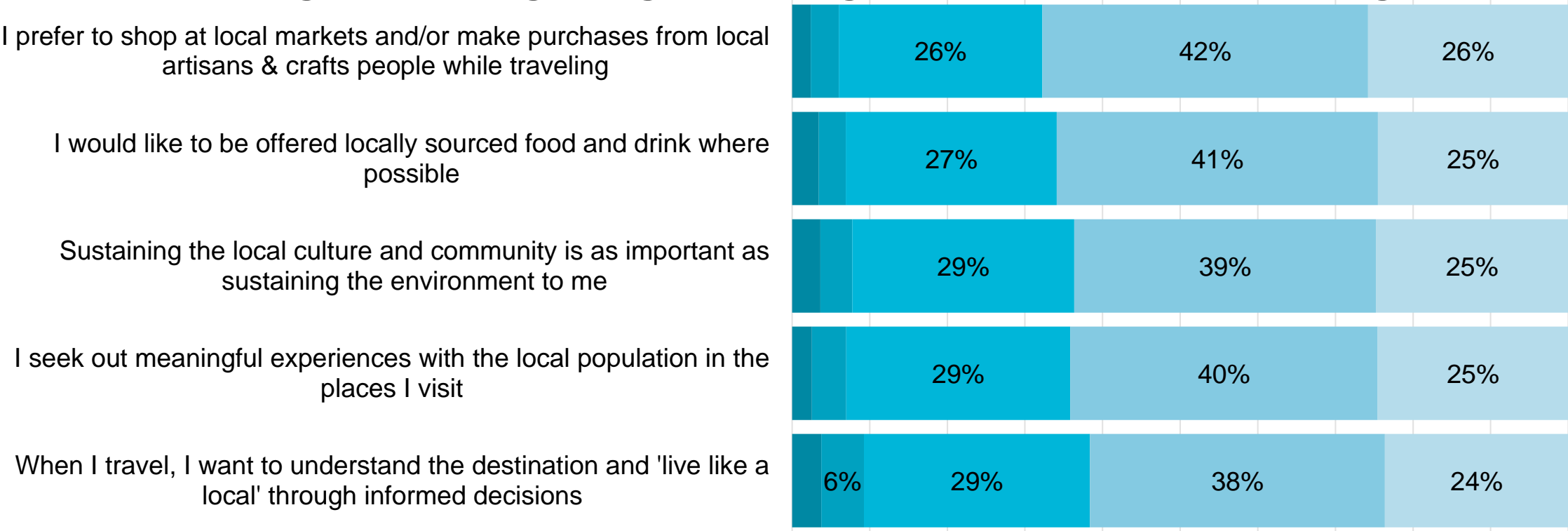


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U.S. Nat Rep: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling

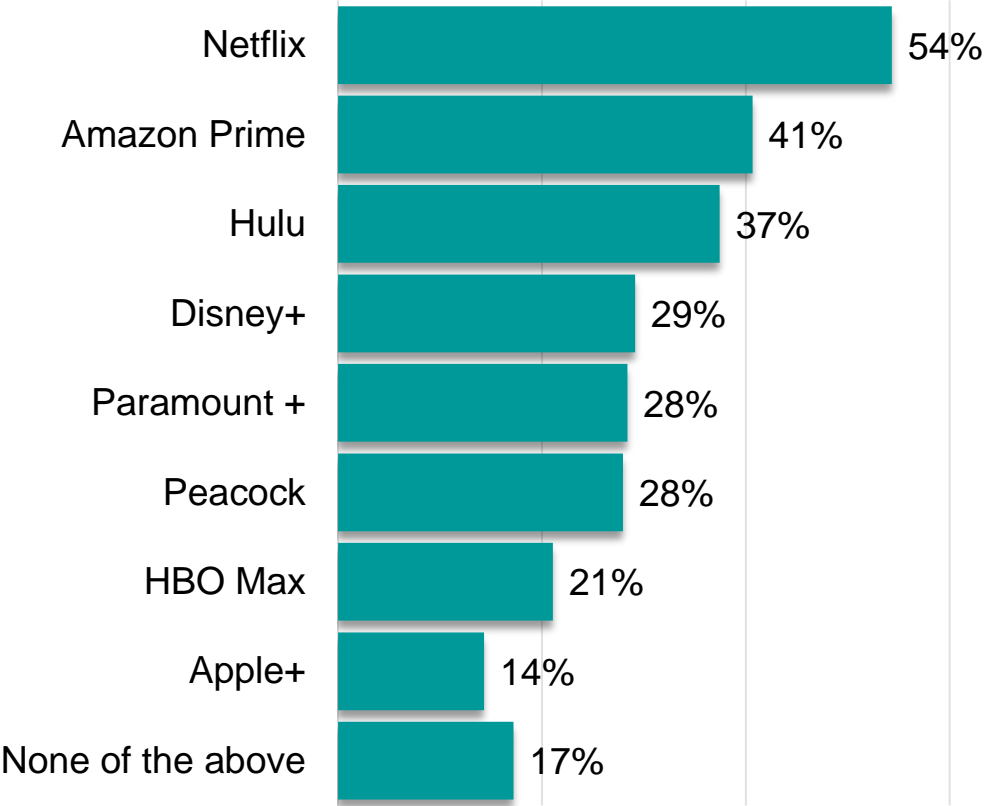


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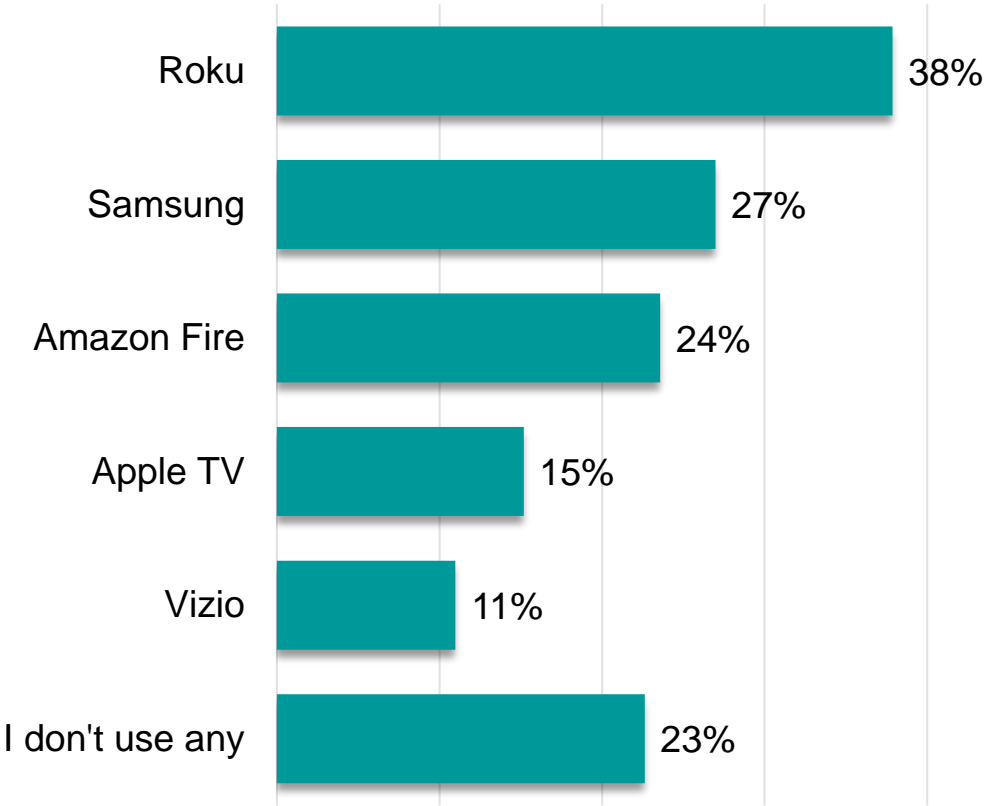
Sample Size: n=1,910

U.S. Media Consumption

Streaming Platforms Used Weekly



Connected Device Used

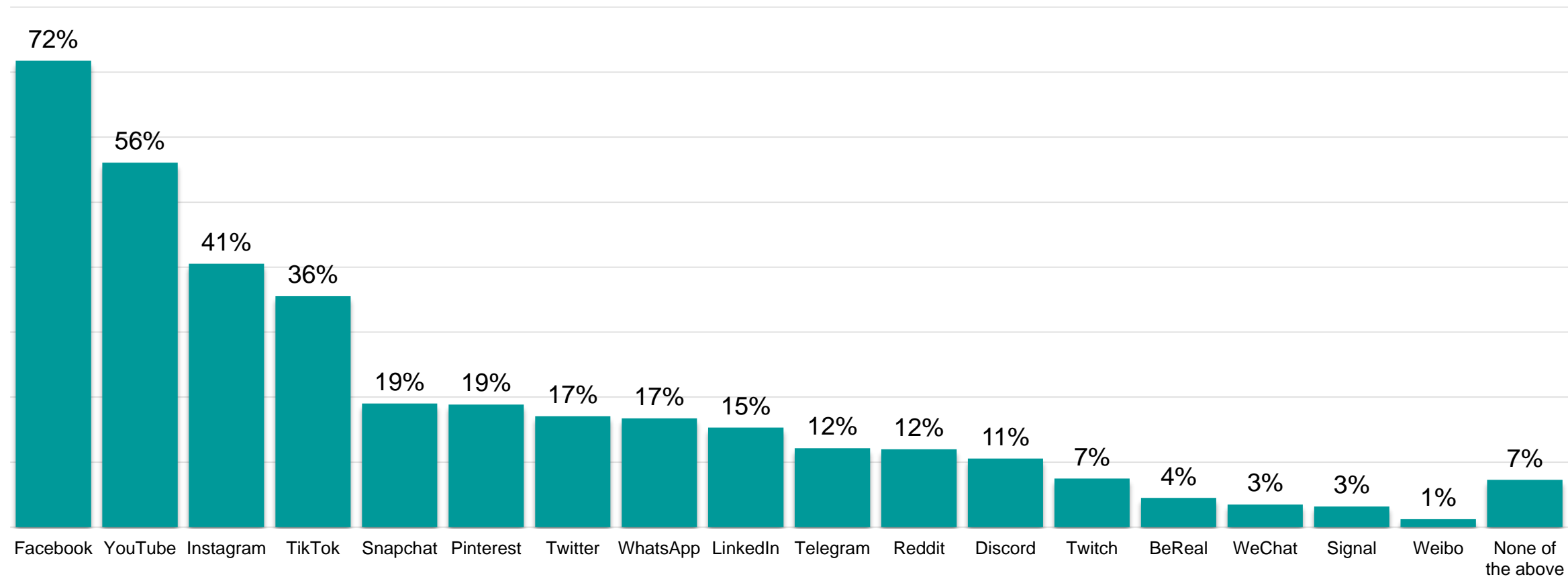


Sample Size: n=1,910

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=1,910

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	29%
Social Media	36%
TV commercials	27%
YouTube	33%
TV Program/Documentary	17%
Email	15%
Radio	9%
Newspaper	11%
Out of home advertising (e.g. Poster Billboards, bus shelter advertisements, etc.)	7%
I don't recall	15%

Actions Taken After Seeing an Ad for a Destination

I search for information about the destination online	37%
I talk to friends/family about the destination	32%
I go to the destination's website	28%
I look up the destination on social media	25%
I book travel to the destination almost immediately	12%
I don't do anything	16%
None of the above	12%

Sample Size: n=1,910