



# **Vision Insights**

## **U.S. Traveler Profiles**

### **March 2023**

April 21, 2023

# 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 US., 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

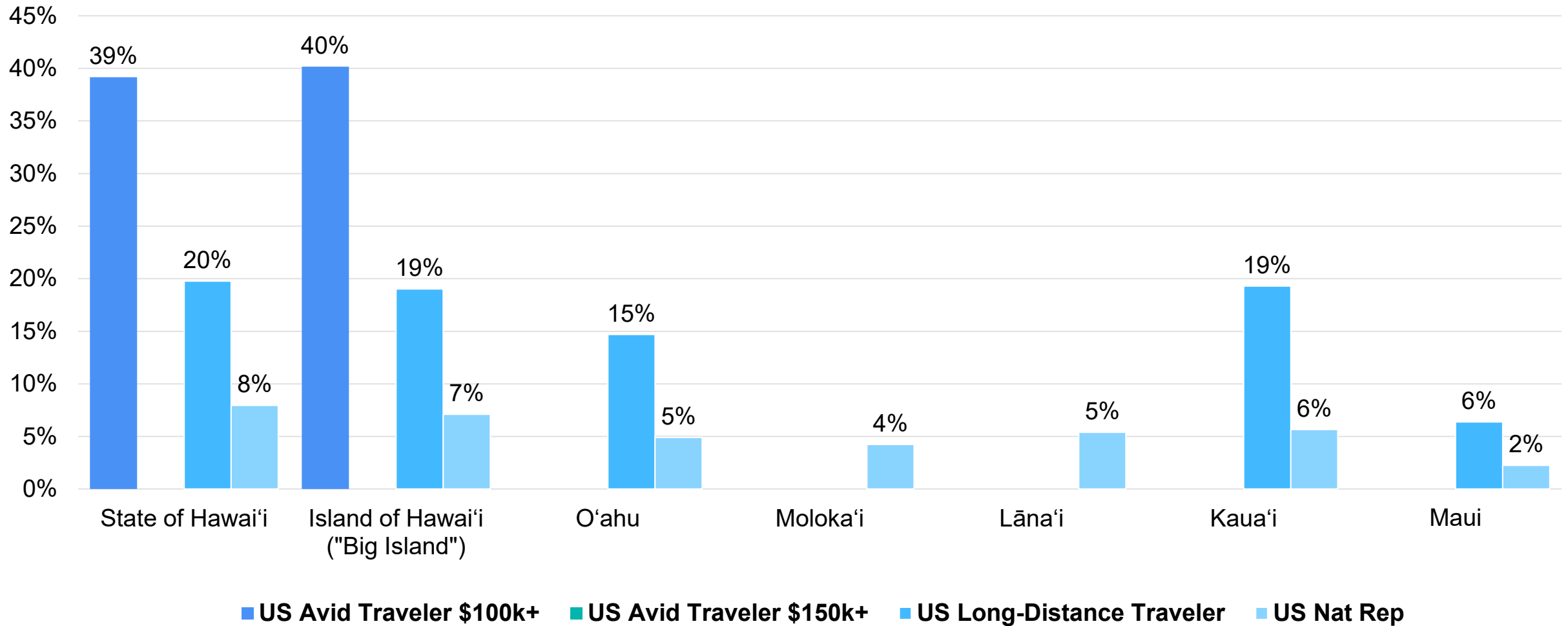
## **Avid Traveler \$150k+**

- 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

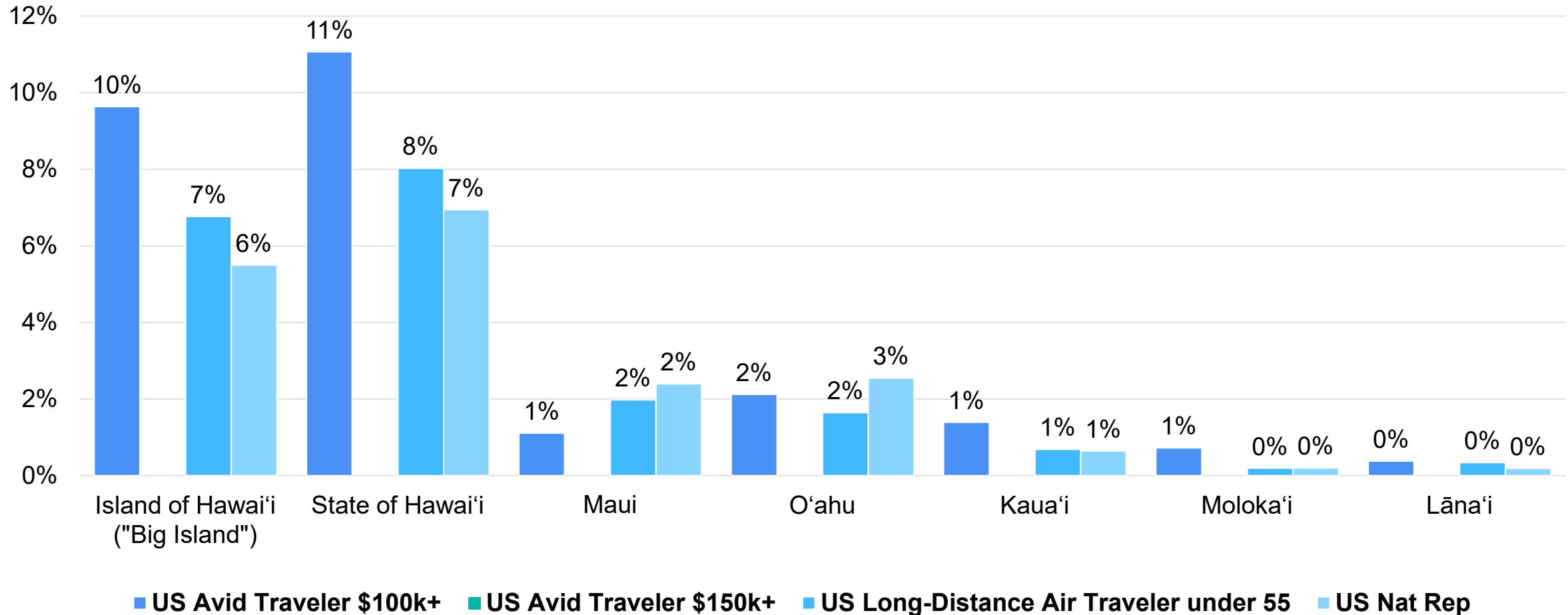
# Leisure Trip - In Past 12 Months



Sample Min. n=75

Note: US Avid Traveler \$150k+ sample size (n=69) is too small

# Leisure Trip – Next Destination



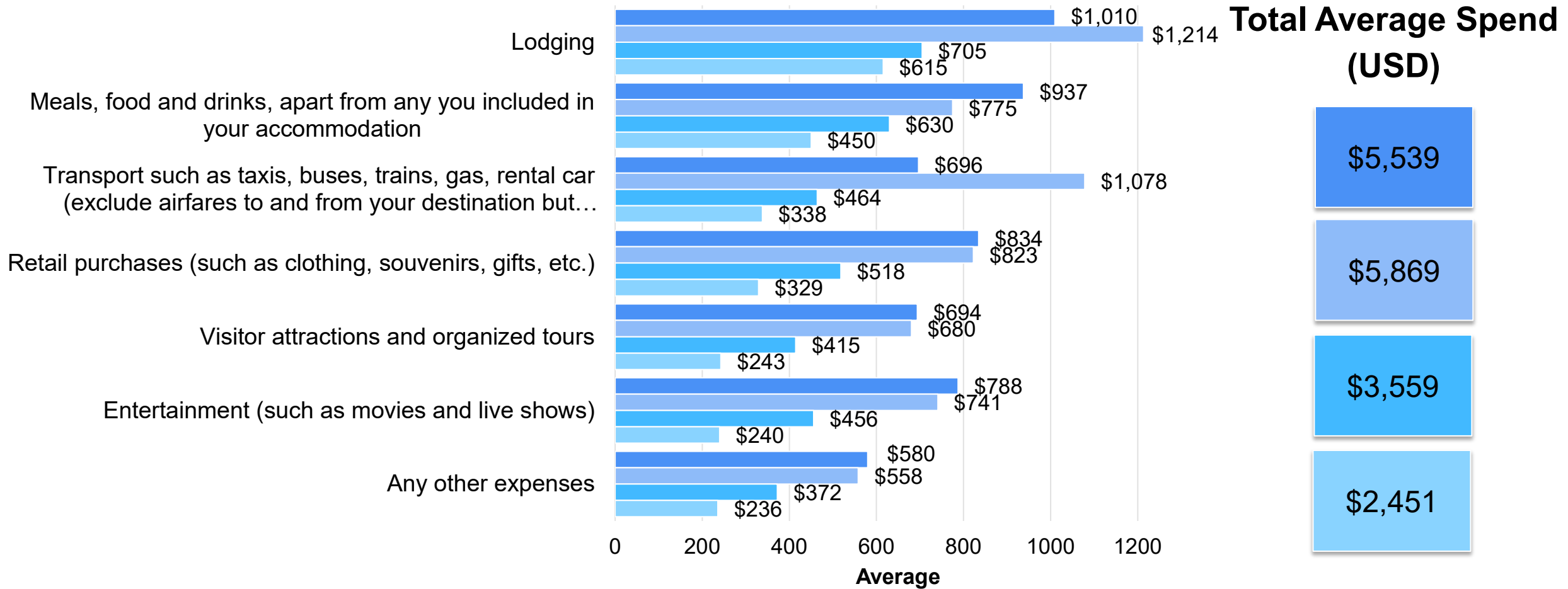
Sample Min. n=75

Note: US Avid Traveler \$150k+ sample size (n=69) is too small

# 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	
	%		%		%		%
California	15.4%	California	13.0%	California	12.1%	California	8.2%
New York	15.1%	New York	25.4%	New York	10.3%	Texas	7.9%
Texas	11.7%	Texas	20.1%	Texas	8.5%	Florida	8.1%
Florida	11.5%	Washington	2.3%	Florida	9.5%	New York	7.2%
Washington	3.4%	Florida	6.2%	Georgia	7.3%	Georgia	5.4%
Georgia	7.0%	Illinois	9.9%	Virginia	3.7%	Pennsylvania	4.6%
Pennsylvania	4.6%	Virginia	2.5%	Washington	2.7%	Ohio	3.3%
Illinois	3.7%	Pennsylvania	2.5%	Illinois	3.2%	Illinois	3.0%
Virginia	2.2%	New Jersey	3.7%	Minnesota	3.5%	North Carolina	3.1%
Minnesota	2.5%	Colorado	2.3%	Pennsylvania	4.1%	Virginia	3.3%
<b>Sample Size:</b>	n=253	<b>Sample Size:</b>	n=69	<b>Sample Size:</b>	n=550	<b>Sample Size:</b>	n=1,862

# 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=253

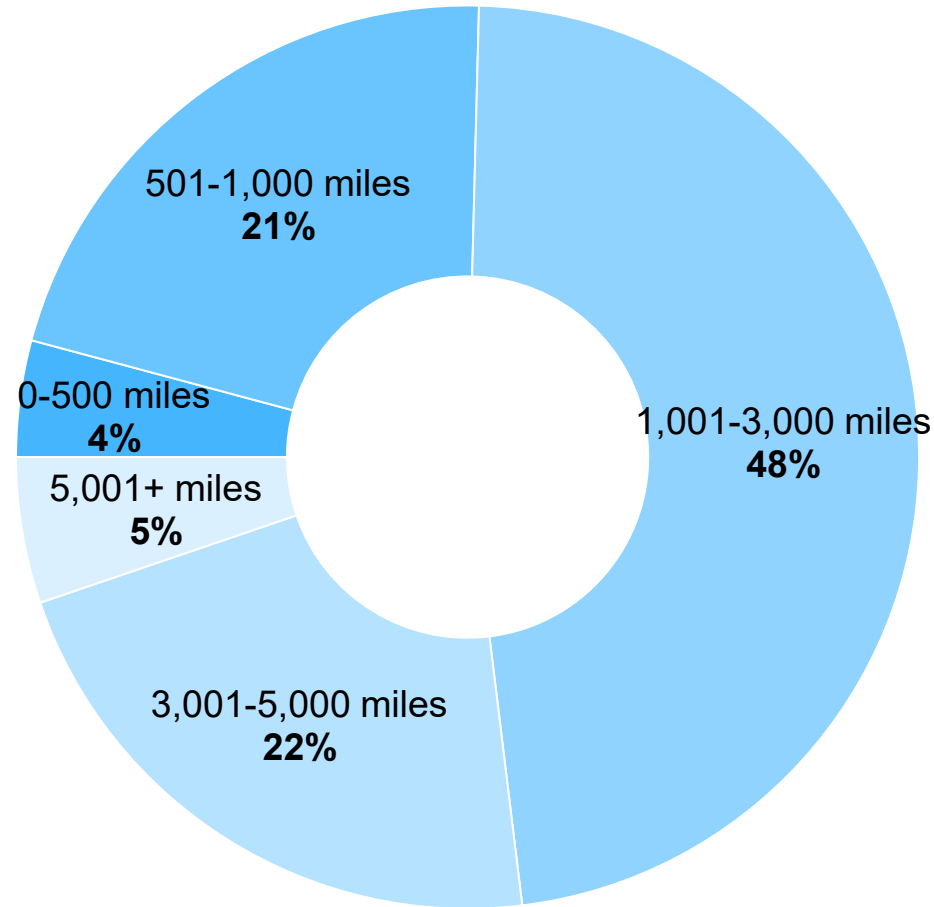
n=69

n=550

n=1,862

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

## Distance Travelled on Annual Vacation



Sample Size: n=253



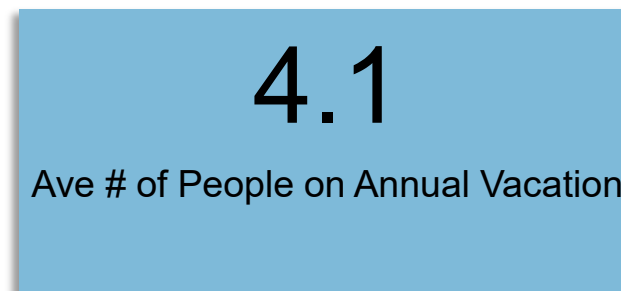
# U.S. Avid Travelers \$100k+: Annual Vacation

## Average Spend



Sample Size: n=253

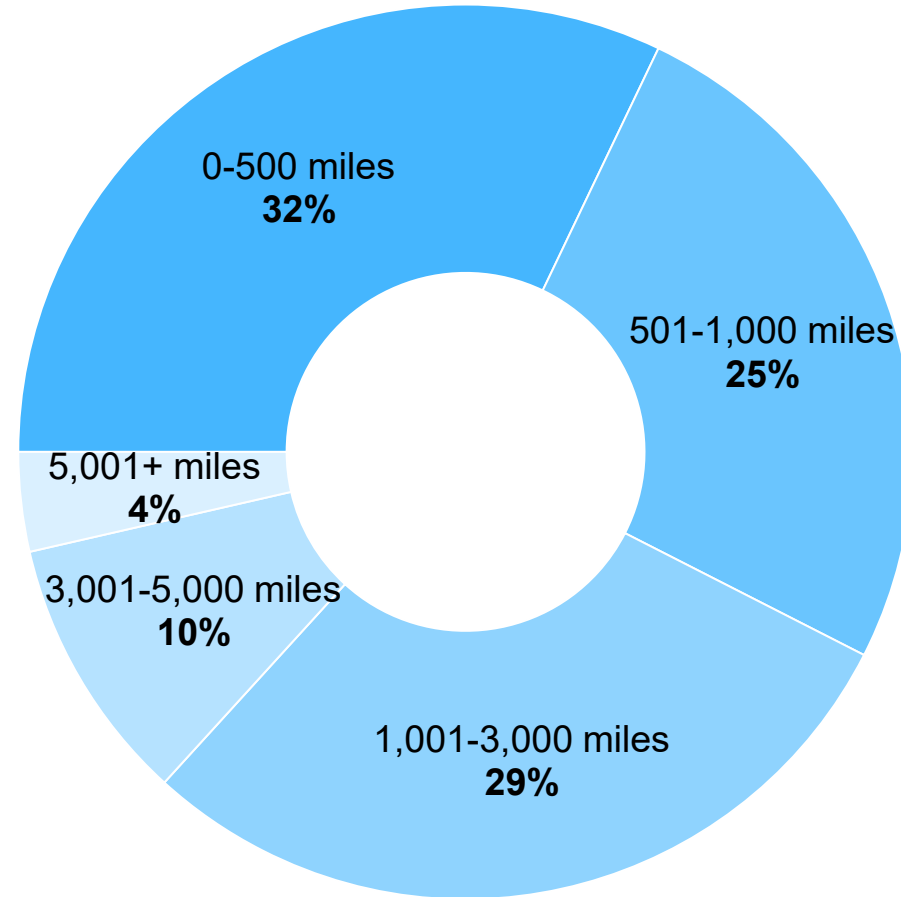
## Spend Per Person Per Day



Ave. Per Person Per Day Spend

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

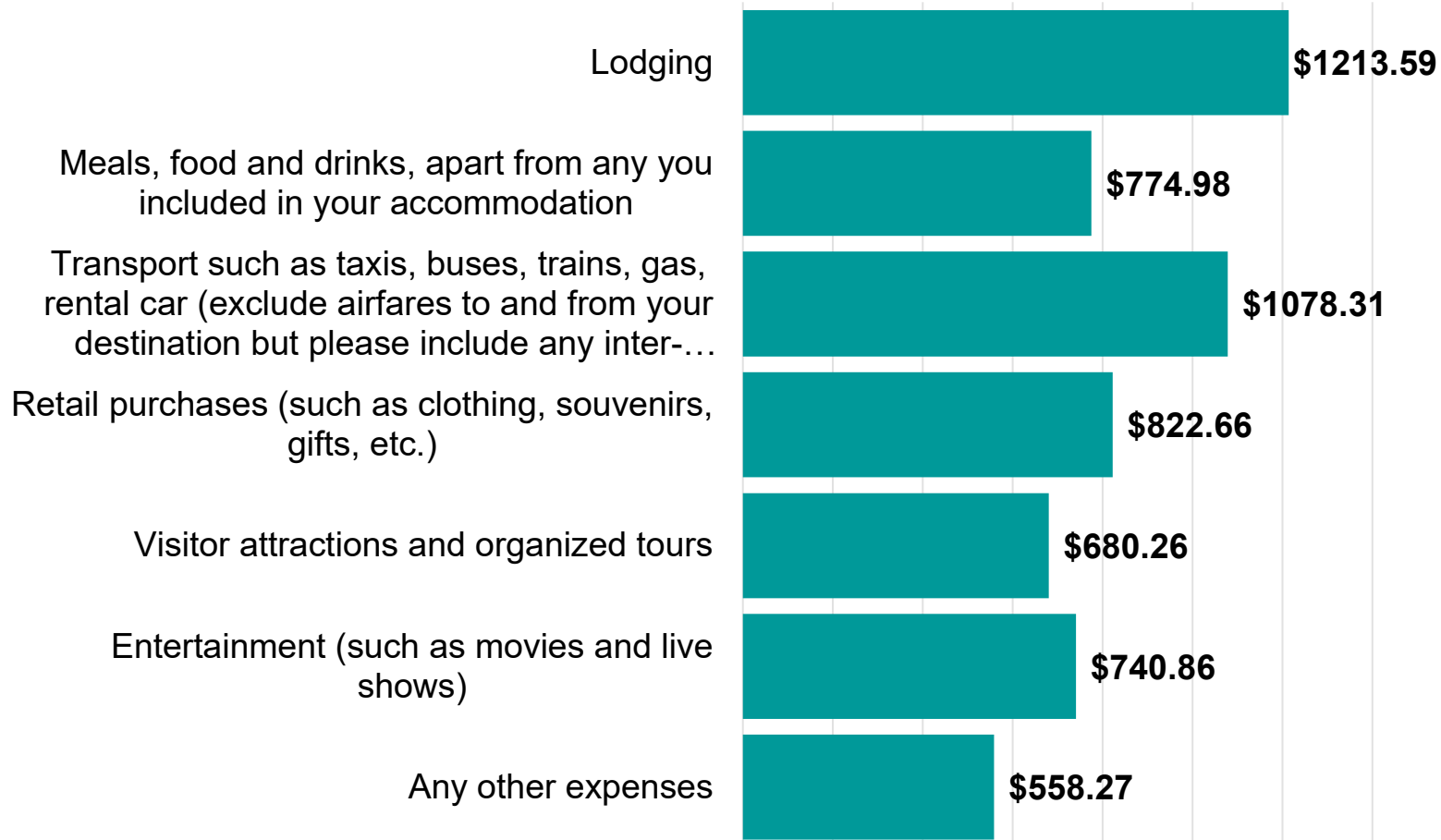
## Distance Travelled on Annual Vacation



Sample Size: n=69

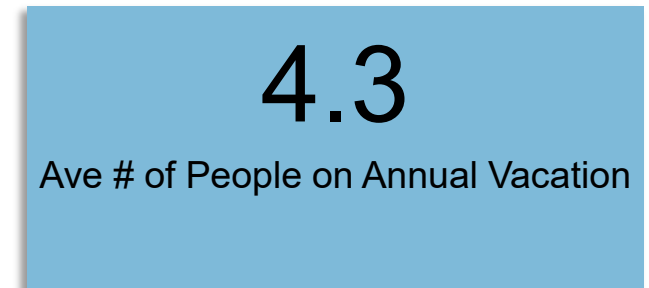
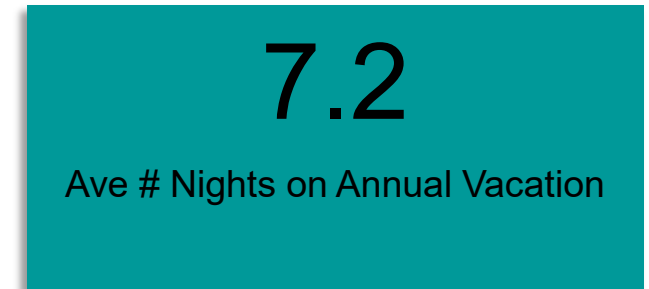
# U.S. Avid Travelers \$150k+: Annual Vacation

## Average Spend



Sample Size: n=69

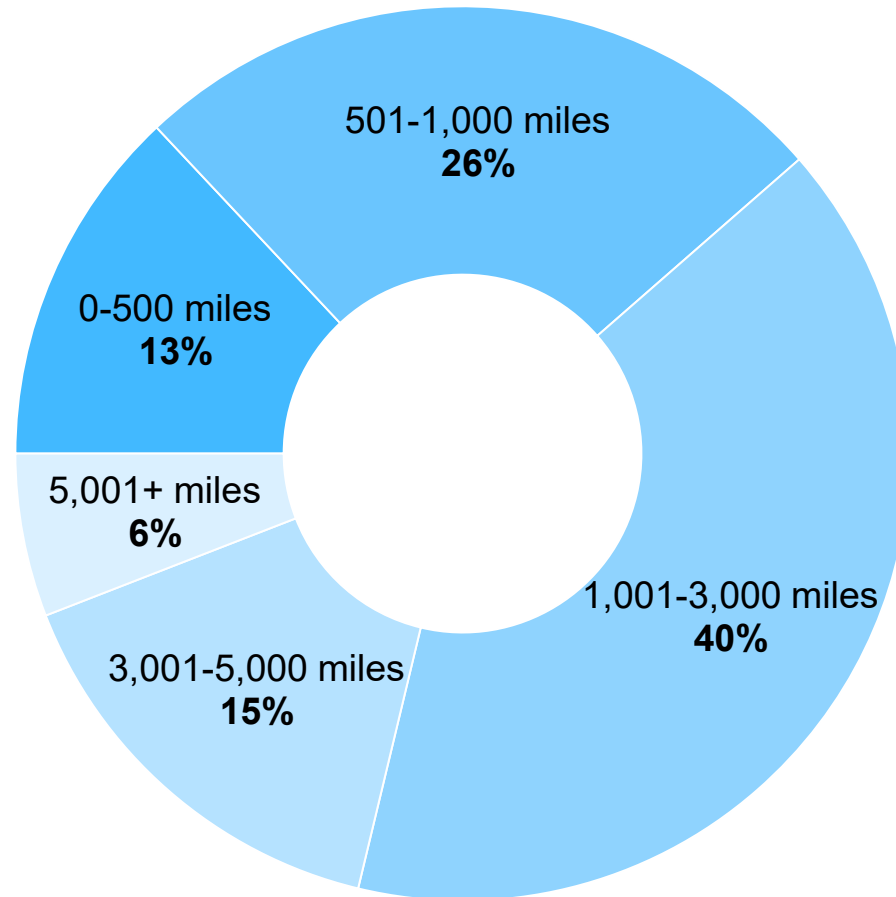
## Spend Per Person Per Day



Ave. Per Person Per Day Spend

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

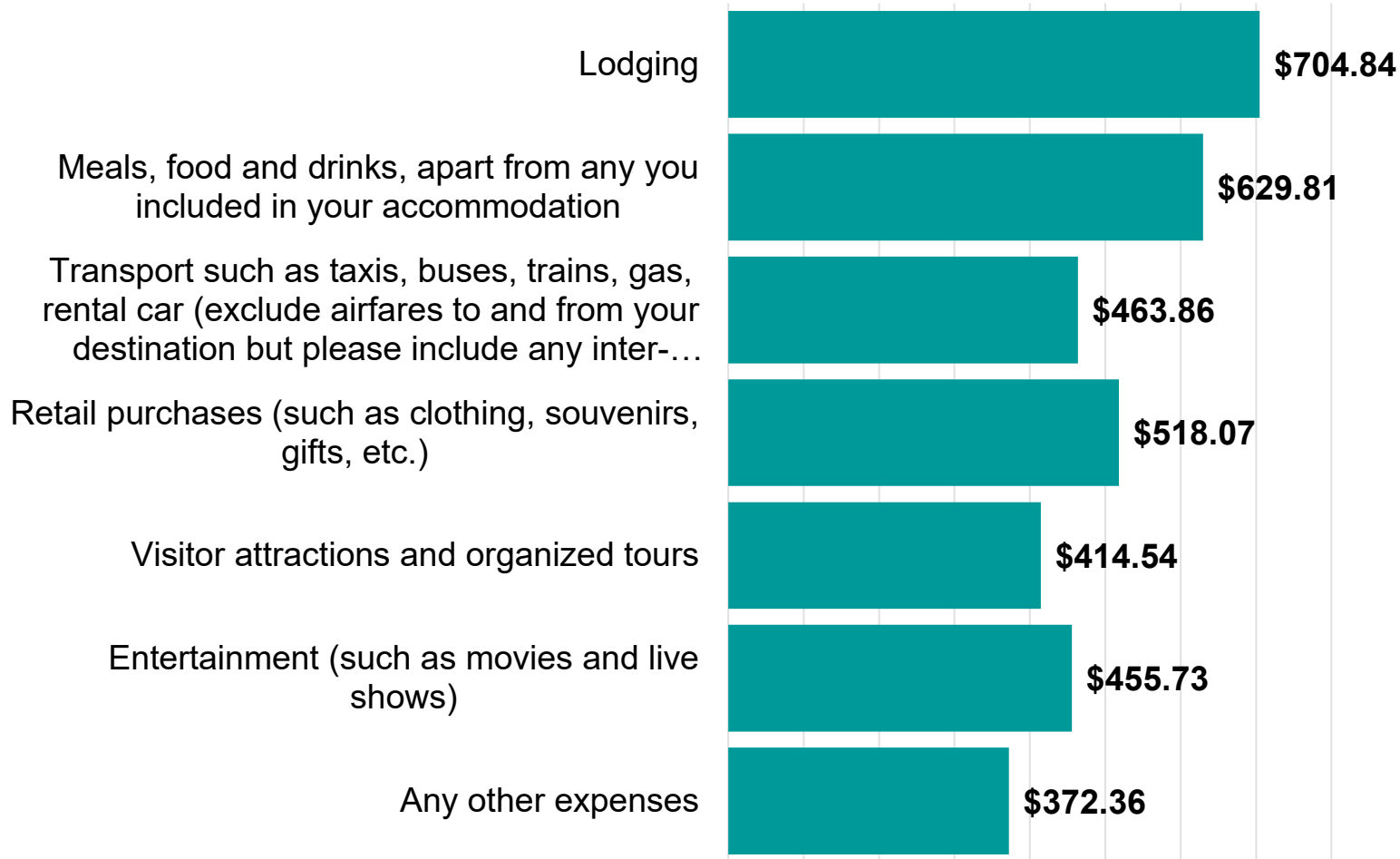
## Distance Travelled on Annual Vacation



Sample Size: n=550

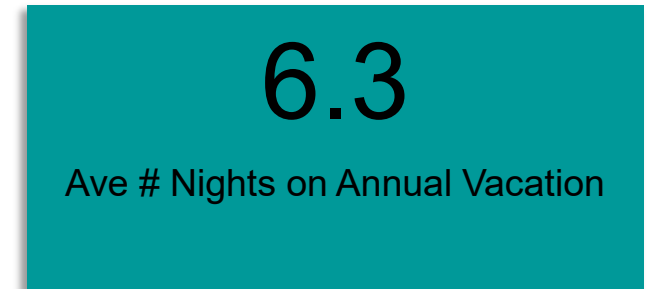
# U.S. Long-Distance Travelers: Annual Vacation

## Average Spend



Sample Size: n=550

## Spend Per Person Per Day

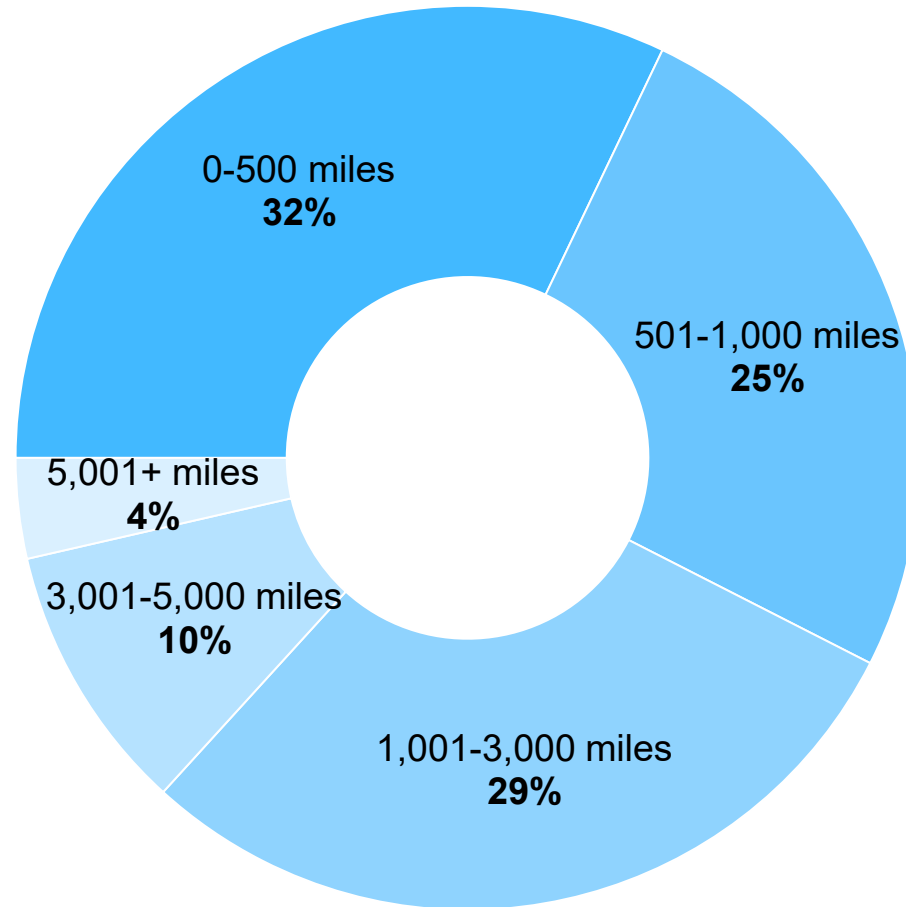


**\$149.38**

Ave. Per Person Per Day Spend

# U.S. Nat Rep: Annual Vacation

## Distance Travelled on Annual Vacation



Sample Size: n=1,862

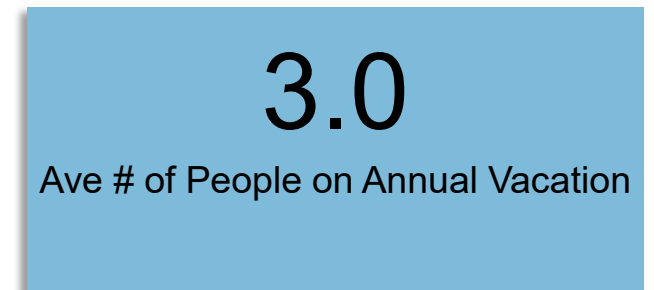
# U.S. Nat Rep: Annual Vacation

## Average Spend



Sample Size: n=1,862

## Spend Per Person Per Day



**\$142.61**

Ave. Per Person Per Day Spend

# Importance of Travel Factors

	Very Important 5			
	US: Avid Traveler \$100k+	US: Avid Traveler \$150k+	US: Long-Distance Air Traveler under 55	US Market
Value for money	56%	69%	50%	56%
Comfort and accessibility	58%	72%	51%	52%
Natural attractions/activities	57%	67%	51%	46%
Family friendly locations and activities	53%	63%	46%	42%
Opportunity to experience local restaurants/businesses	56%	64%	47%	42%
Cultural attractions	54%	63%	44%	39%
Entertainment and nightlife	51%	65%	43%	32%
Consideration of sustainable principles	49%	66%	41%	29%

Sample Size:

n=253

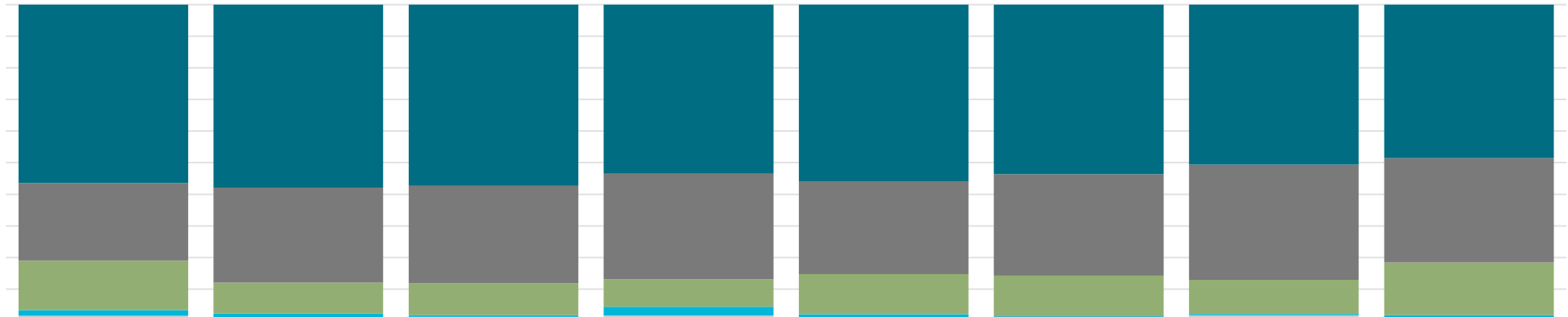
n=69

n=550

n=1,862



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

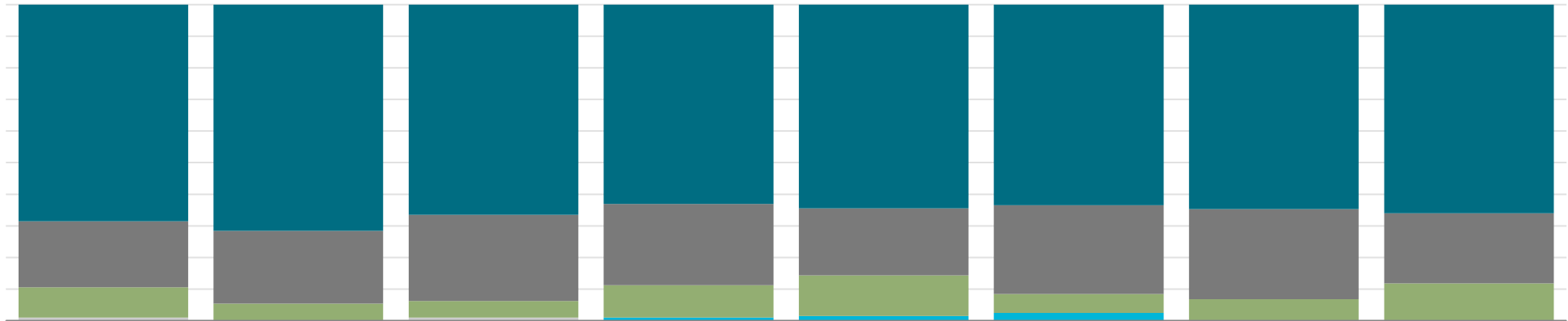


	Value for money	Comfort and accessibility	Natural attractions/ activities	Family friendly locations and activities	Opportunity to experience local restaurants/ businesses	Cultural attractions	Entertainment and nightlife	Consideration of sustainable principles
■ Very Important 5	56%	58%	57%	53%	56%	54%	51%	49%
■ 4	25%	30%	31%	33%	29%	32%	36%	33%
■ 3	16%	10%	10%	9%	13%	13%	11%	17%
■ 2	2%	1%	1%	3%	2%	1%	0%	1%
■ Not very Important 1	2%	1%	1%	2%	0%	0%	2%	0%

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

Sample Size: n=253

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

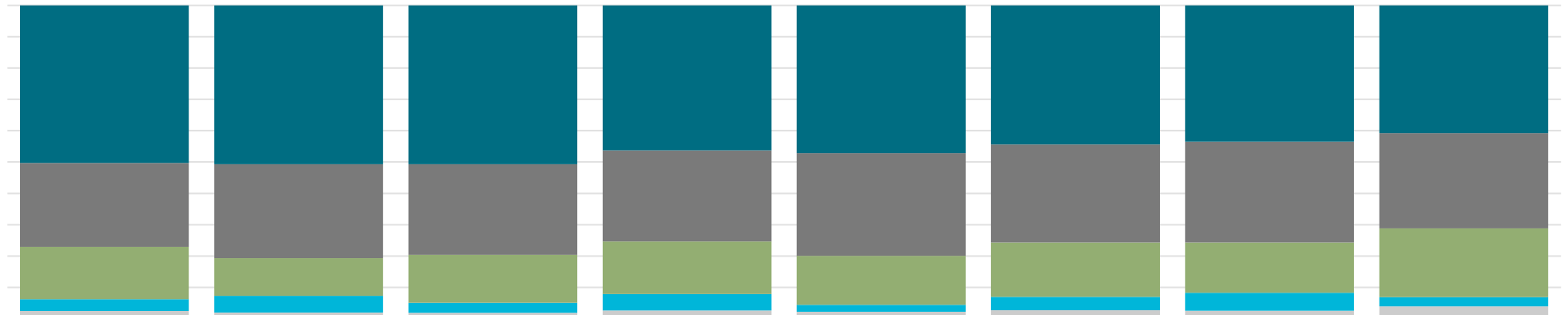


	Value for money	Comfort and accessibility	Natural attractions/ activities	Family friendly locations and activities	Opportunity to experience local restaurants/ businesses	Cultural attractions	Entertainment and nightlife	Consideration of sustainable principles
Very Important 5	69%	72%	67%	63%	64%	63%	65%	66%
4	21%	23%	27%	26%	21%	28%	28%	22%
3	10%	5%	5%	10%	13%	6%	7%	12%
2	0%	0%	0%	1%	1%	2%	0%	0%
Not very Important 1	1%	0%	1%	0%	0%	0%	0%	0%

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

Sample Size: n=69

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

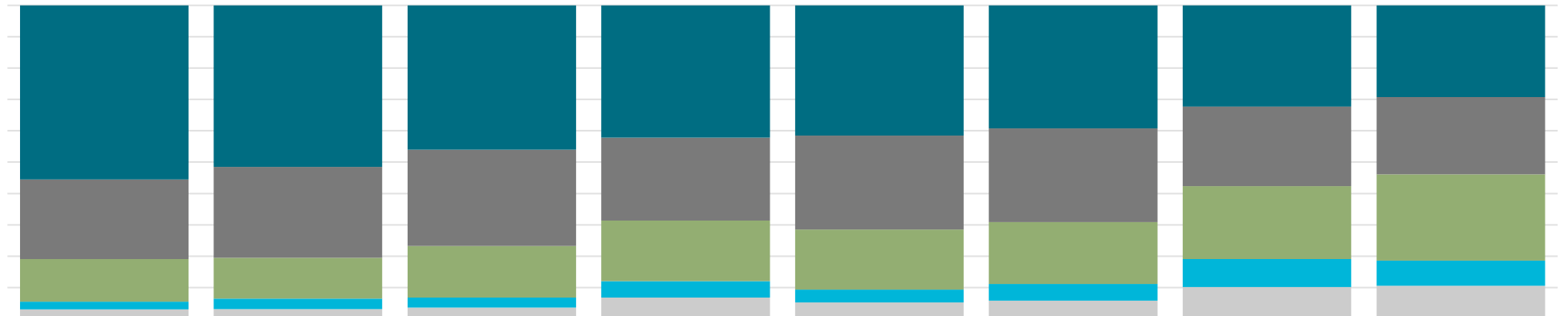


	Value for money	Comfort and accessibility	Natural attractions/ activities	Family friendly locations and activities	Opportunity to experience local restaurants/ businesses	Cultural attractions	Entertainment and nightlife	Consideration of sustainable principles
■ Very Important 5	50%	51%	51%	46%	47%	44%	43%	41%
■ 4	27%	30%	29%	29%	33%	31%	32%	30%
■ 3	17%	12%	15%	17%	16%	17%	16%	22%
■ 2	4%	5%	3%	5%	2%	4%	6%	3%
■ Not very Important 1	2%	2%	2%	3%	2%	3%	3%	4%

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

Sample Size: n=550

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



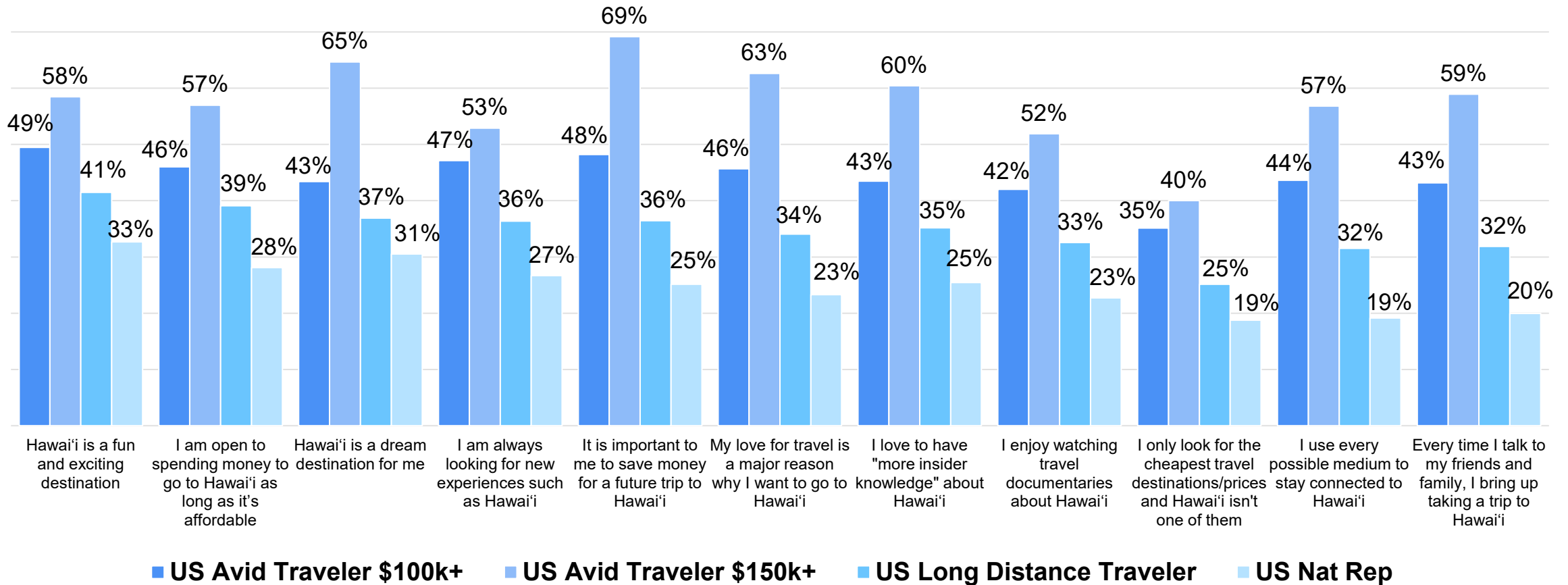
	Value for money	Comfort and accessibility	Natural attractions/activities	Family friendly locations and activities	Opportunity to experience local restaurants/businesses	Cultural attractions	Entertainment and nightlife	Consideration of sustainable principles
■ Very Important 5	56%	52%	46%	42%	42%	39%	32%	29%
■ 4	25%	29%	31%	26%	30%	30%	25%	25%
■ 3	14%	13%	16%	19%	19%	20%	23%	27%
■ 2	2%	3%	3%	5%	4%	5%	9%	8%
■ Not very Important 1	3%	3%	4%	7%	5%	6%	10%	11%

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

Sample Size: n=1,862

# Hawai'i as an Aspirational Destination

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



Sample Size:

n=253

n=69

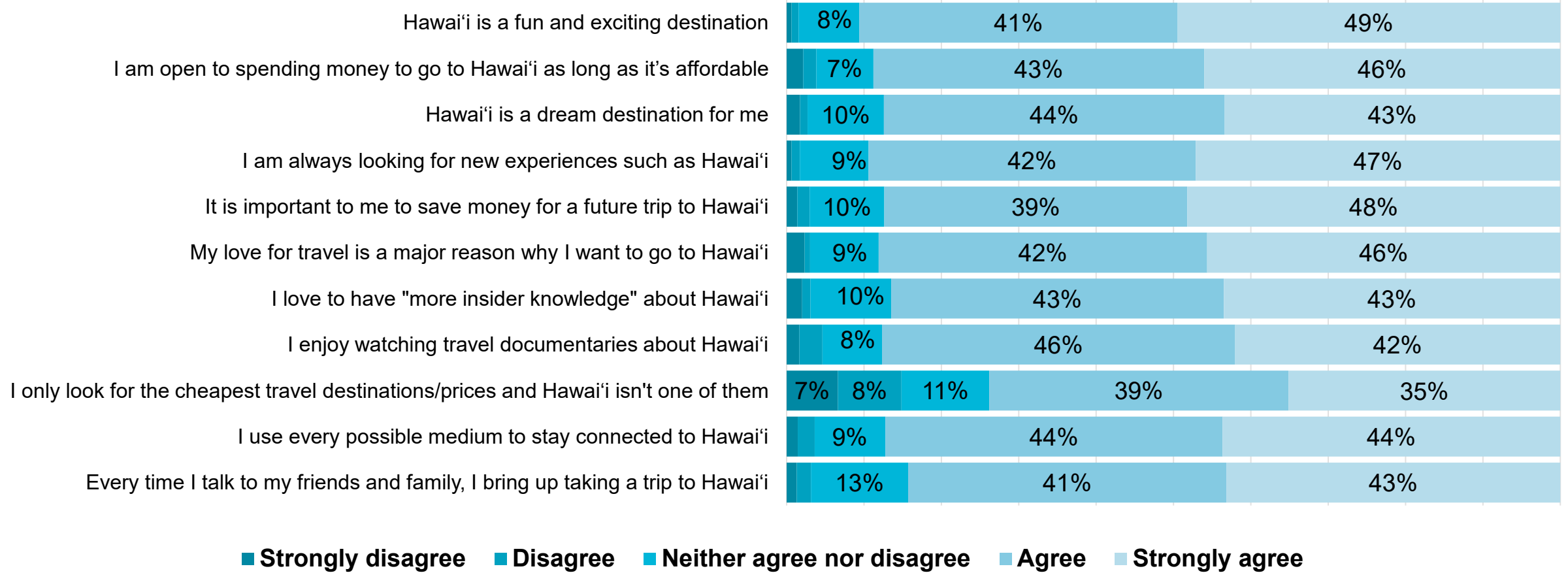
n=550

n=1,862

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

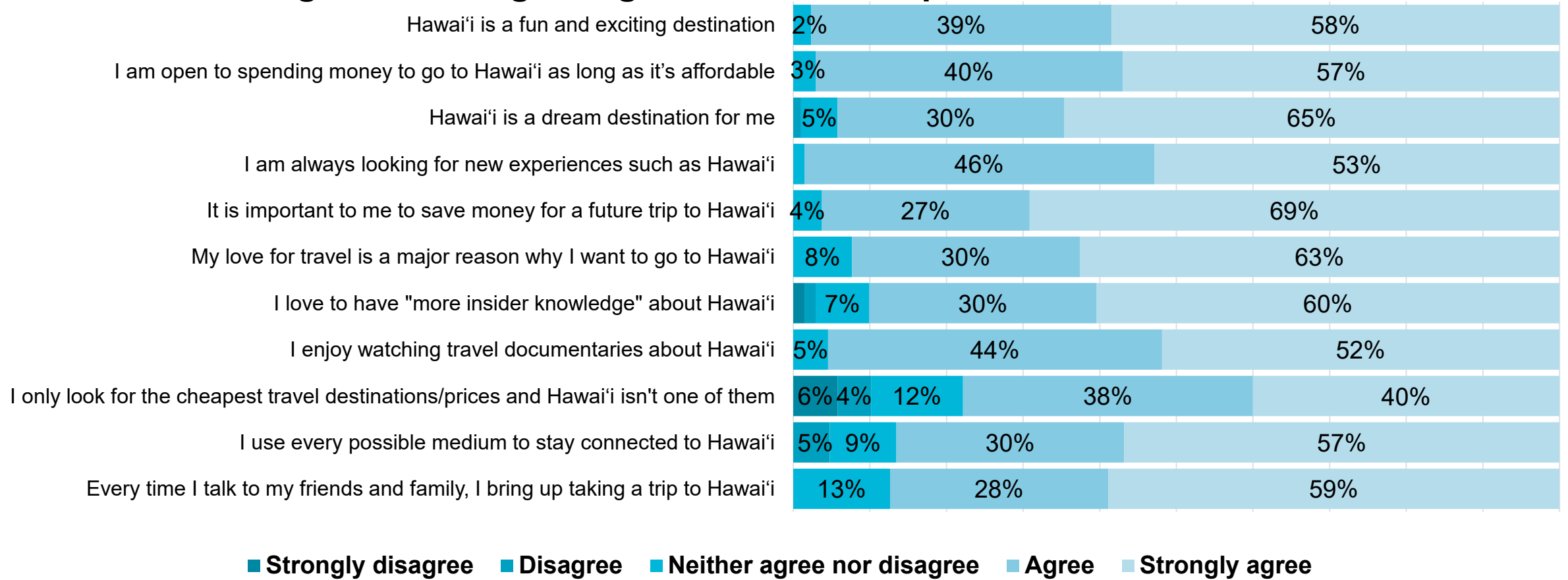
## Agreement Regarding Hawai'i as an Aspirational Destination



Sample Size: n=253

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

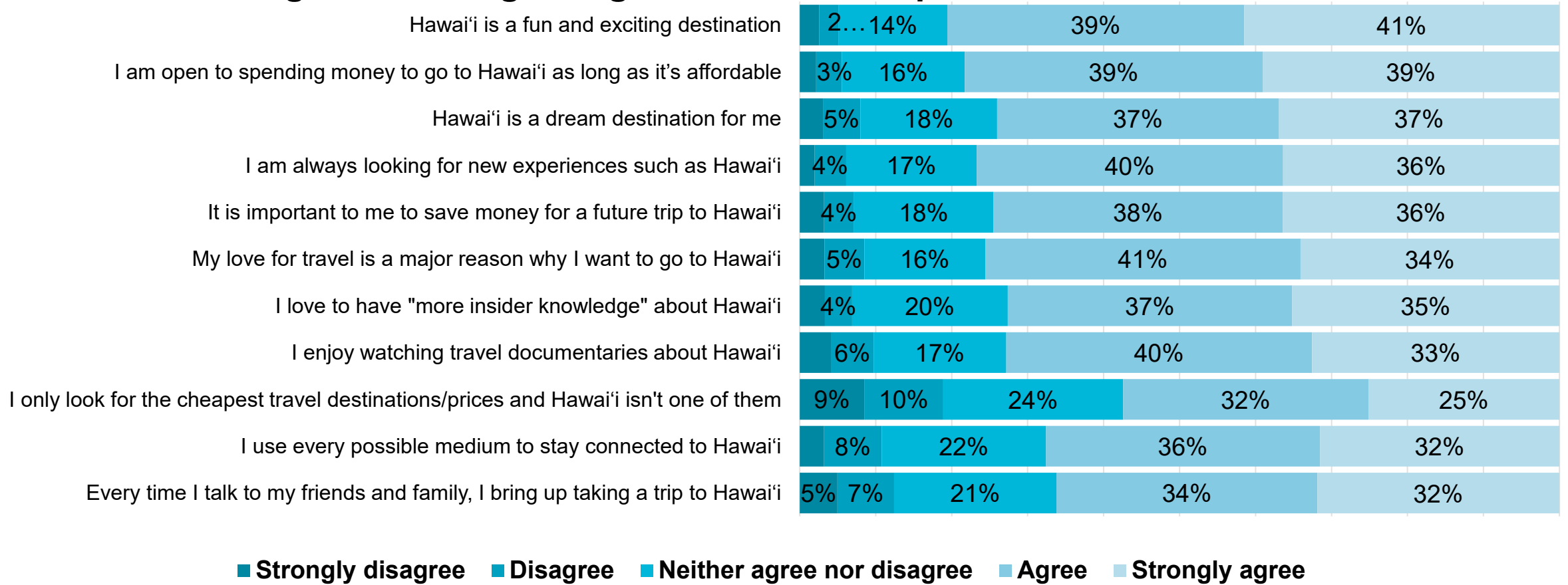
## Agreement Regarding Hawai'i as an Aspirational Destination



Sample Size: n=69

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

## Agreement Regarding Hawai'i as an Aspirational Destination

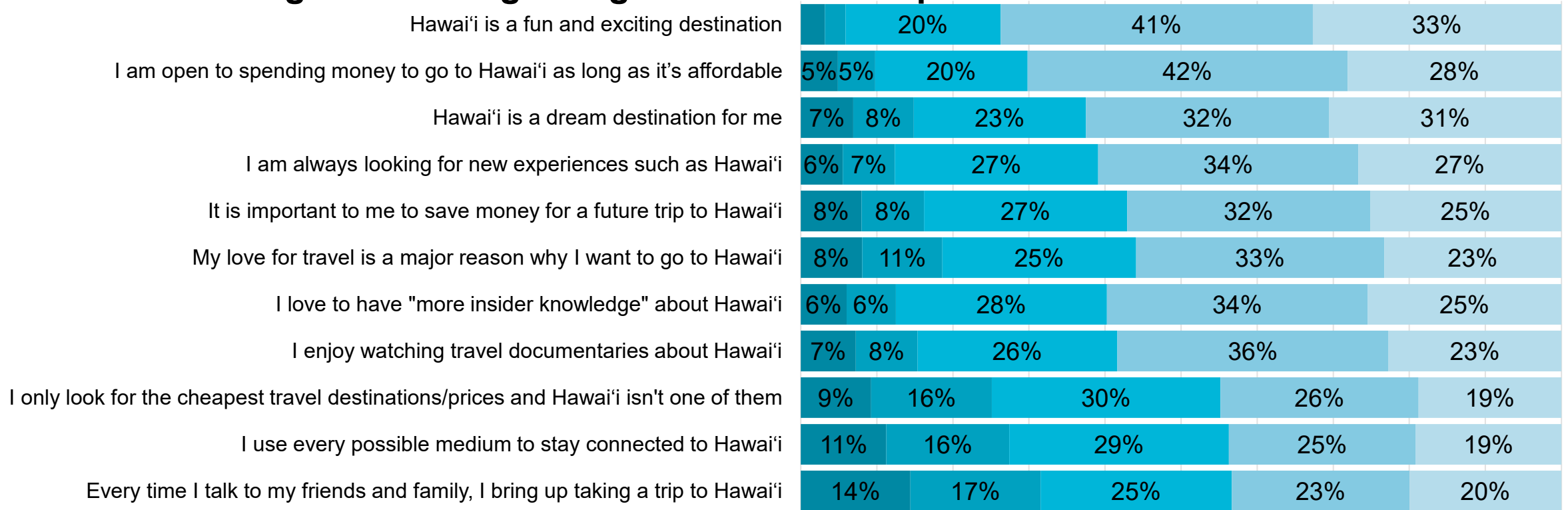


Sample Size: n=550



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

## Agreement Regarding Hawai'i as an Aspirational Destination

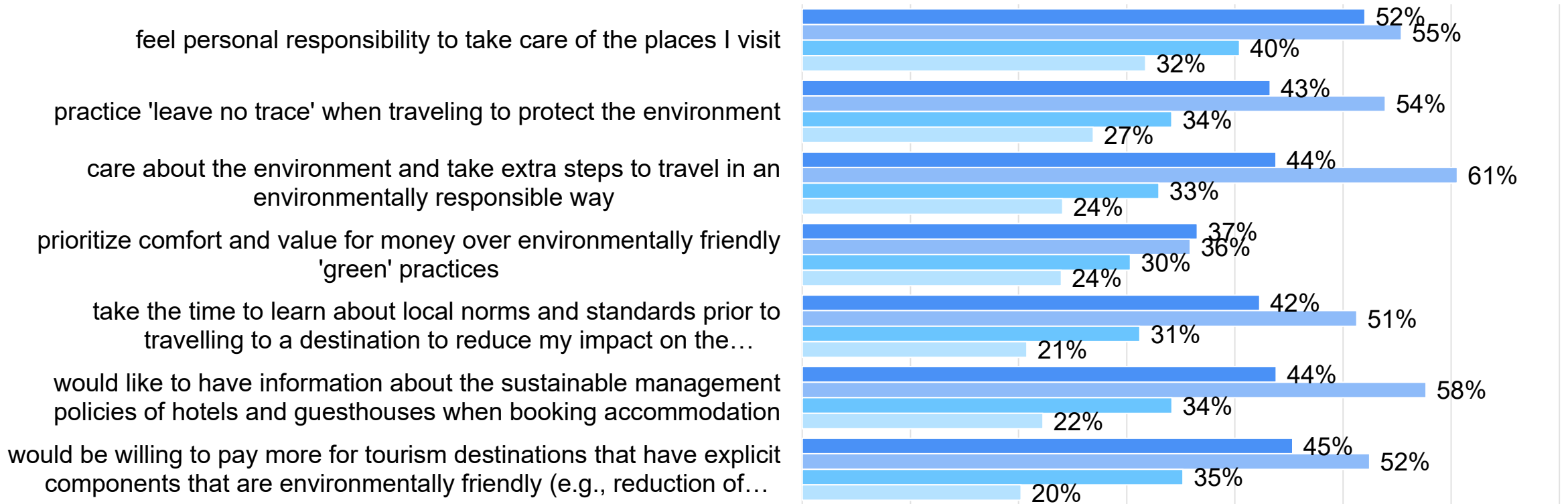


■ Strongly disagree 
 ■ Disagree 
 ■ Neither agree nor disagree 
 ■ Agree 
 ■ Strongly agree

Sample Size: n=1,862

# 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=253

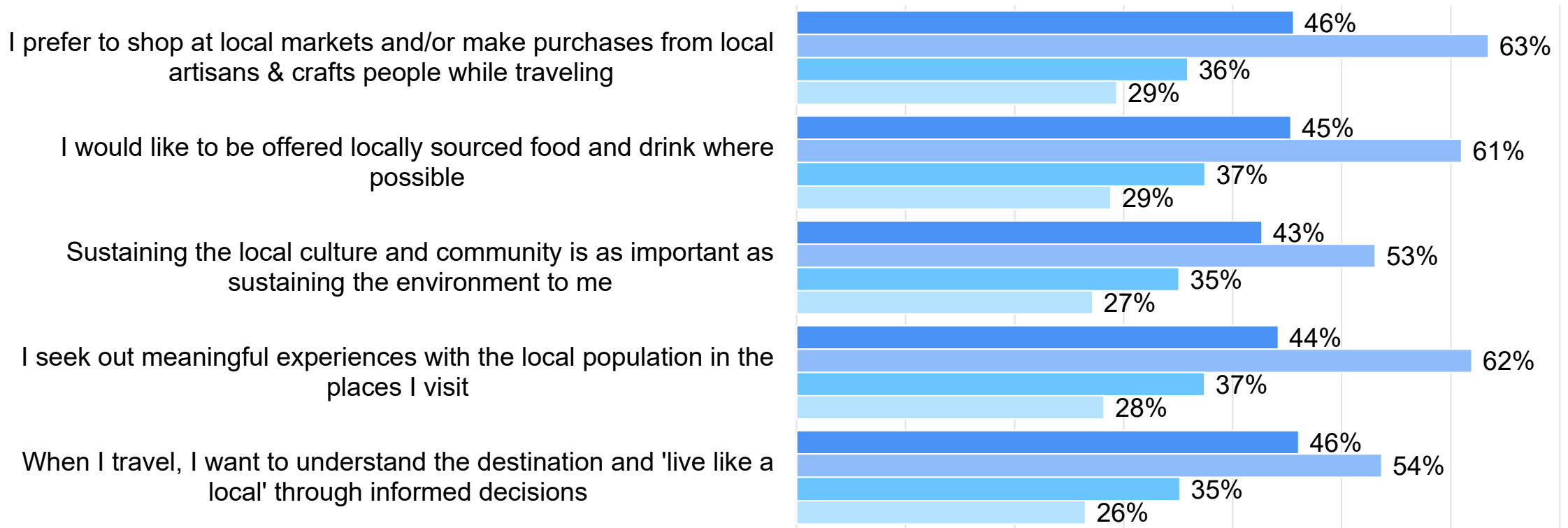
n=69

n=550

n=1,862

# 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=253

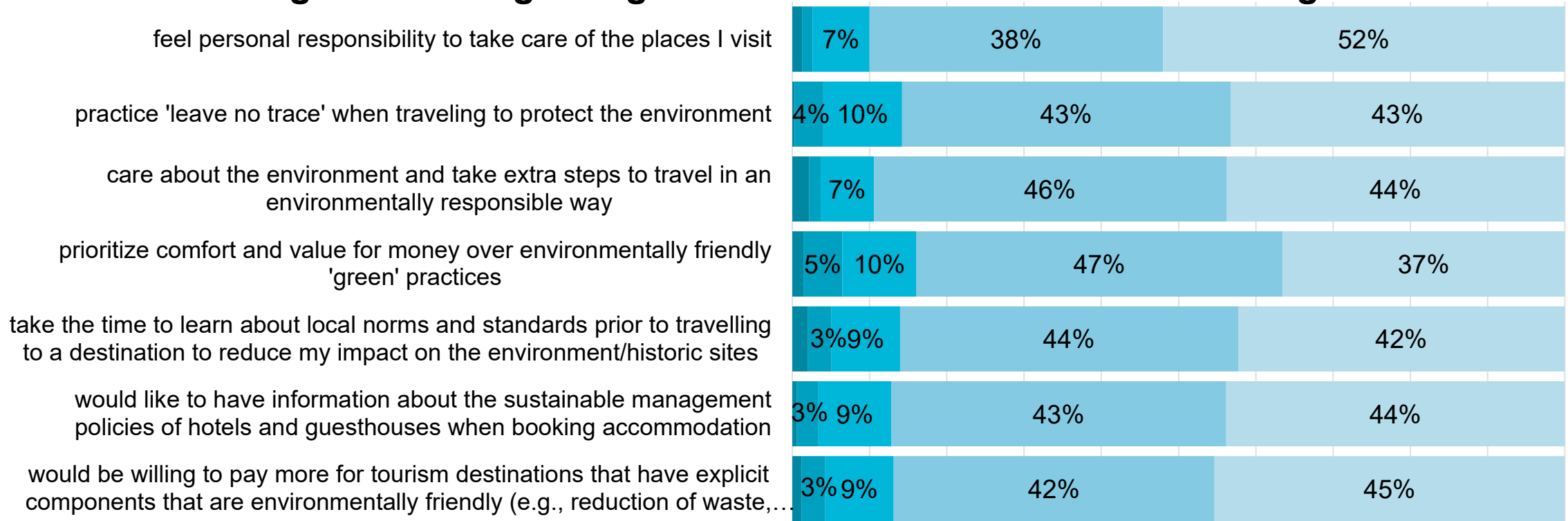
n=69

n=550

n=1,862

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

## Agreement Regarding Sustainable Practices While Traveling

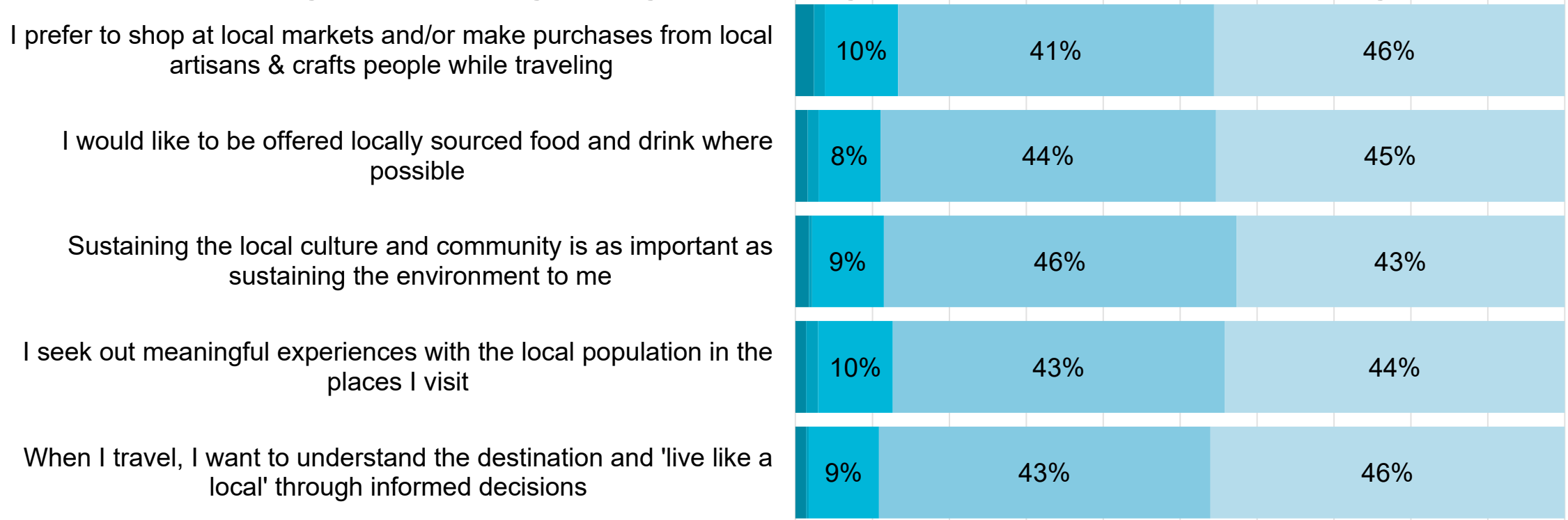


■ Strongly disagree  
 ■ Disagree  
 ■ Neither agree nor disagree  
 ■ Agree  
 ■ Strongly agree

Sample Size: n=253

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

## Agreement Regarding Sustaining Local Culture While Traveling

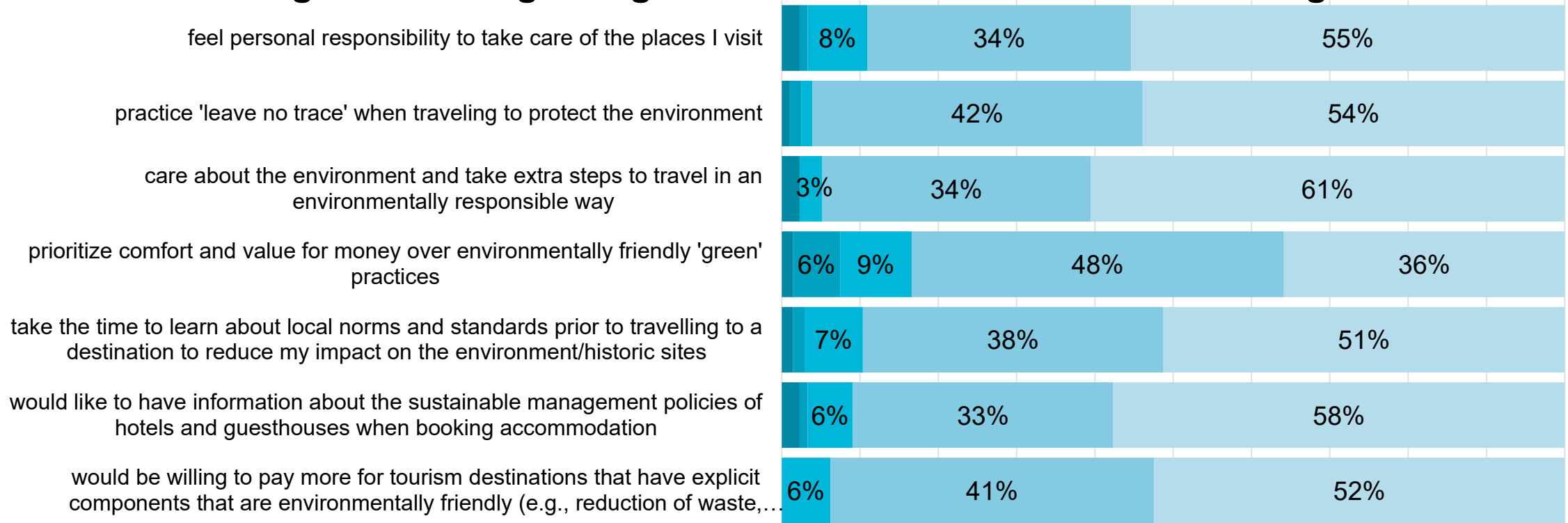


■ Strongly disagree 
 ■ Disagree 
 ■ Neither agree nor disagree 
 ■ Agree 
 ■ Strongly agree

Sample Size: n=253

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

## Agreement Regarding Sustainable Practices While Traveling

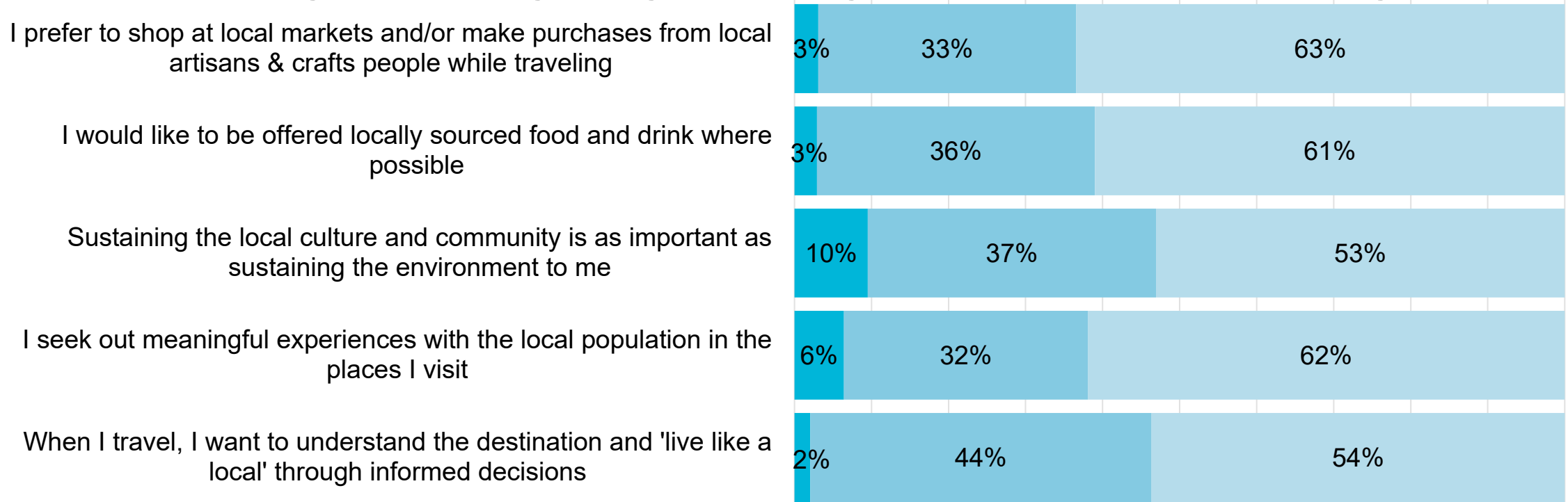


■ Strongly disagree 
 ■ Disagree 
 ■ Neither agree nor disagree 
 ■ Agree 
 ■ Strongly agree

Sample Size: n=69

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

## Agreement Regarding Sustaining Local Culture While Traveling

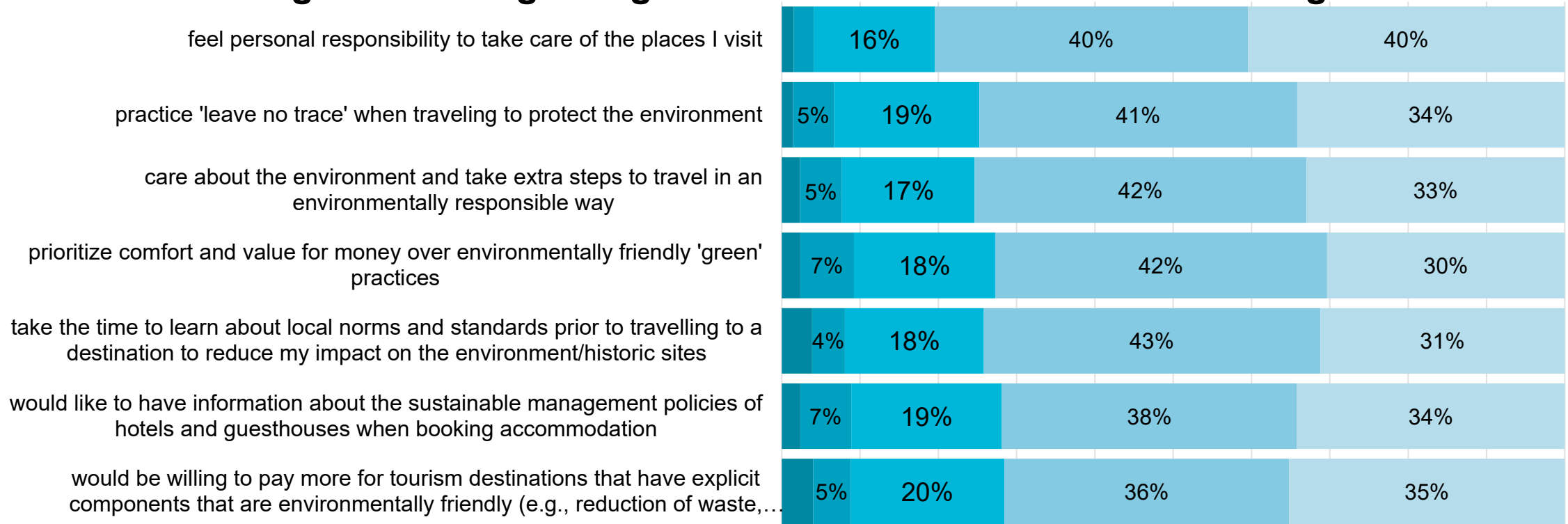


■ Strongly disagree 
 ■ Disagree 
 ■ Neither agree nor disagree 
 ■ Agree 
 ■ Strongly agree

Sample Size: n=69

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

## Agreement Regarding Sustainable Practices While Traveling



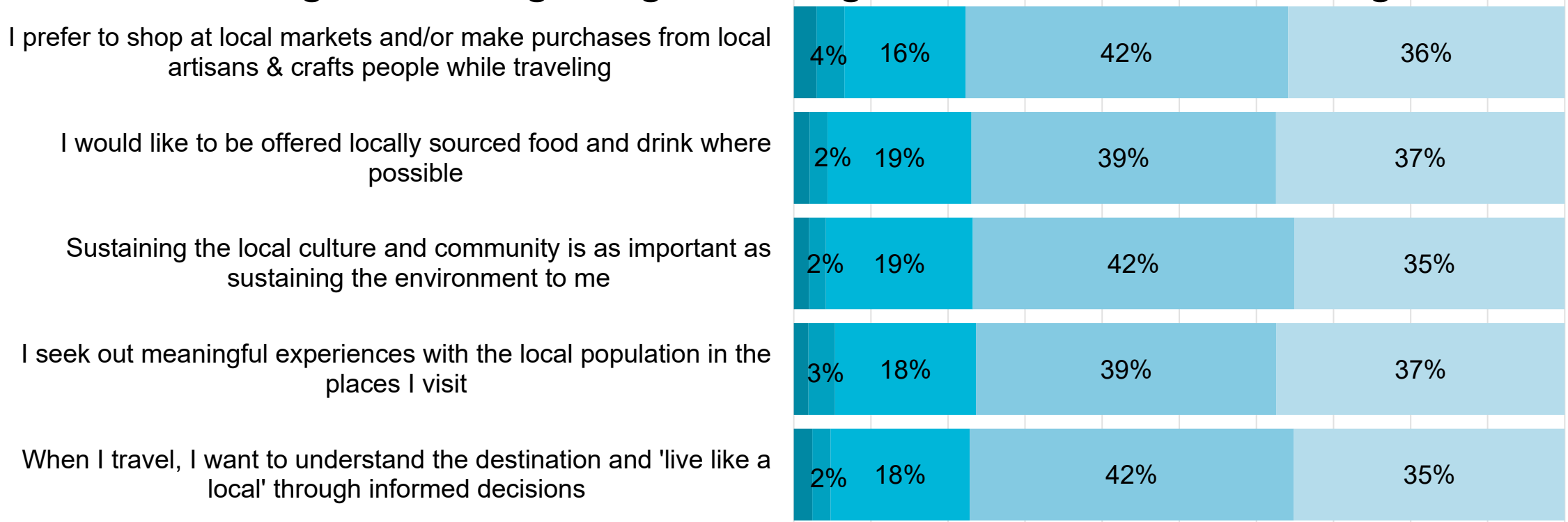
■ Strongly disagree 
 ■ Disagree 
 ■ Neither agree nor disagree 
 ■ Agree 
 ■ Strongly agree

Sample Size: n=550



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

## Agreement Regarding Sustaining Local Culture While Traveling

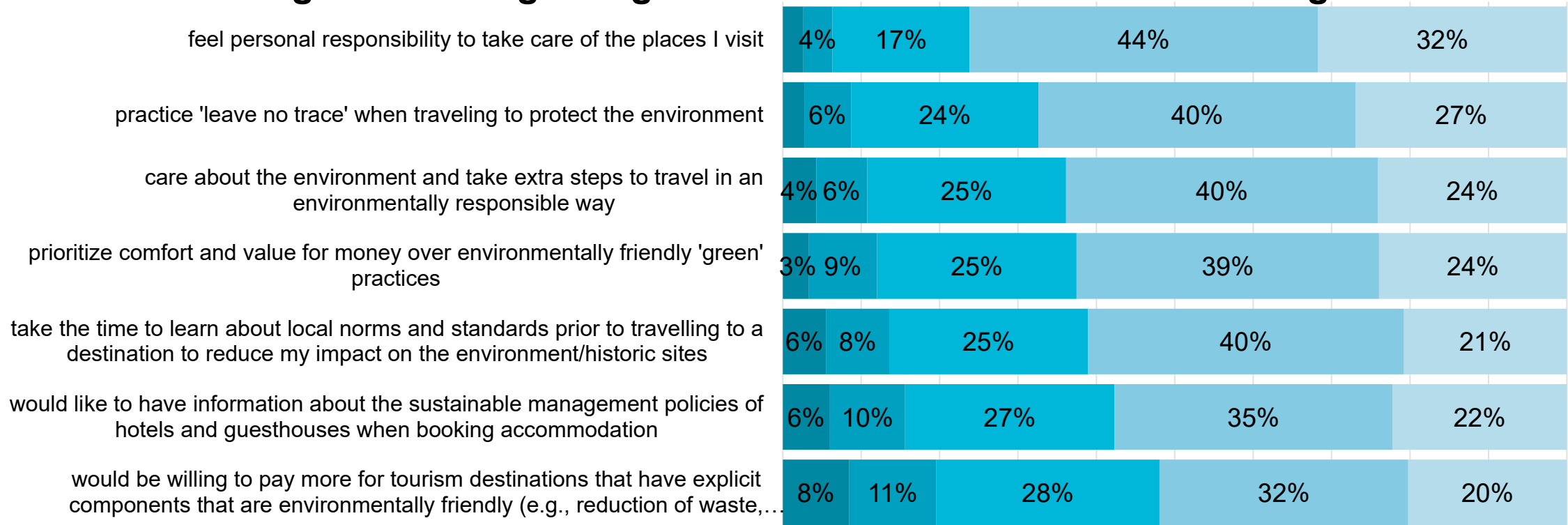


■ Strongly disagree 
 ■ Disagree 
 ■ Neither agree nor disagree 
 ■ Agree 
 ■ Strongly agree

Sample Size: n=550

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

## Agreement Regarding Sustainable Practices While Traveling

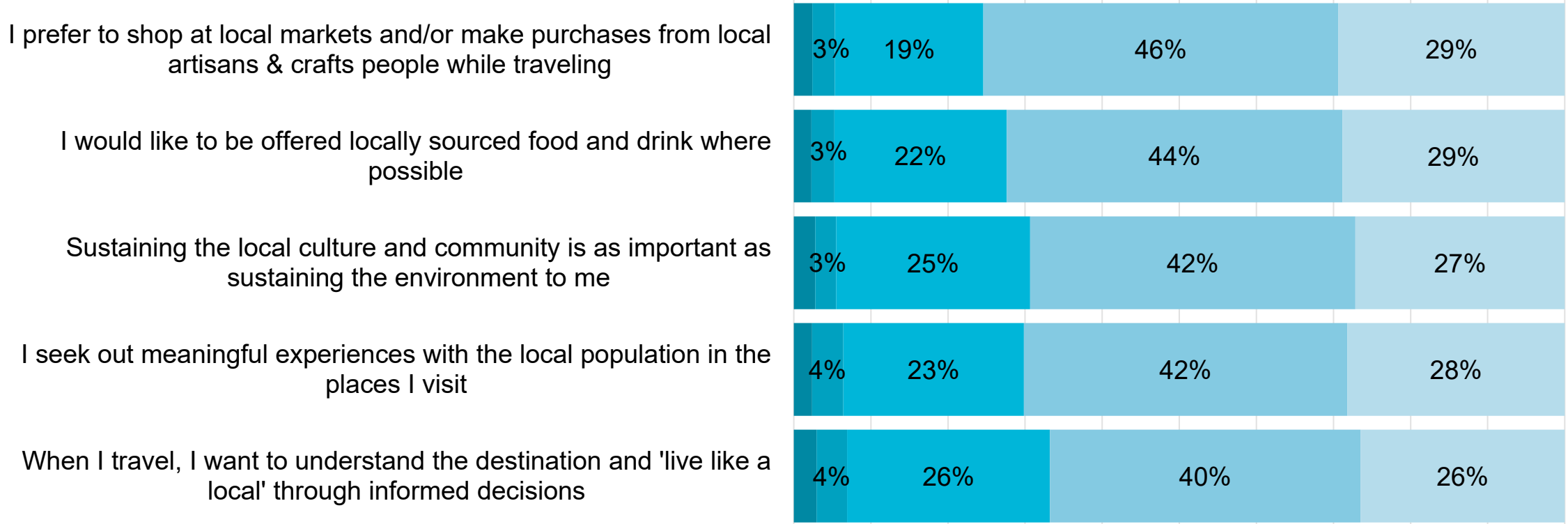


■ Strongly disagree 
 ■ Disagree 
 ■ Neither agree nor disagree 
 ■ Agree 
 ■ Strongly agree

Sample Size: n=1,862

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

## Agreement Regarding Sustaining Local Culture While Traveling

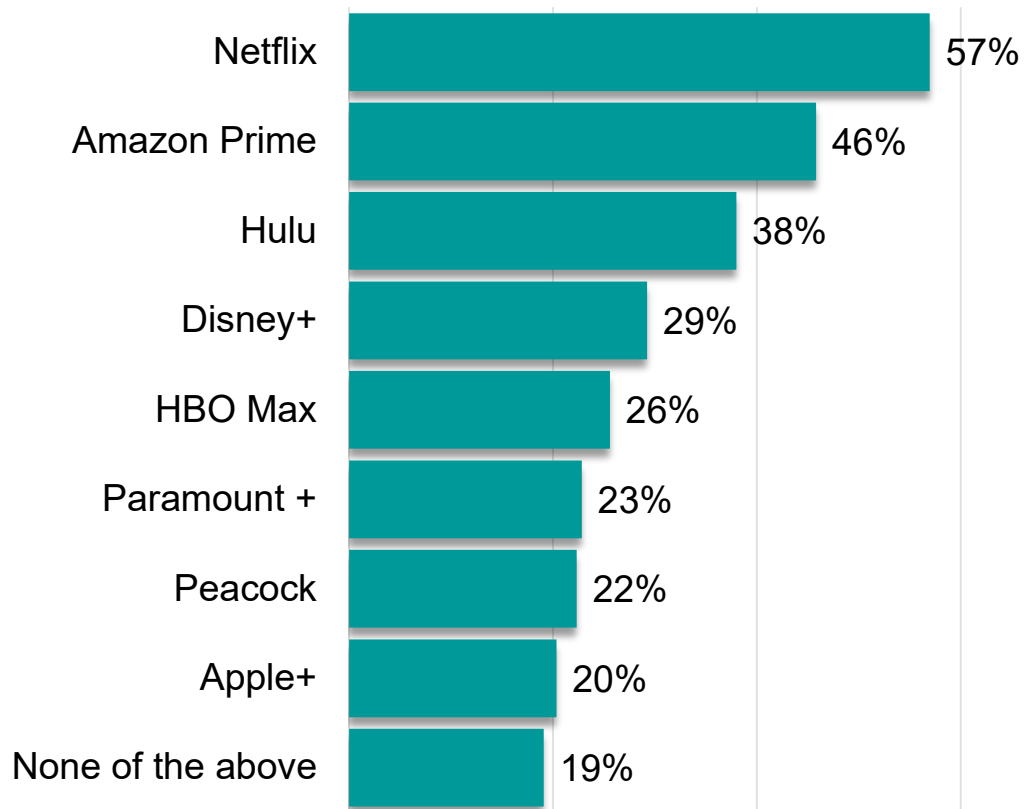


■ Strongly disagree 
 ■ Disagree 
 ■ Neither agree nor disagree 
 ■ Agree 
 ■ Strongly agree

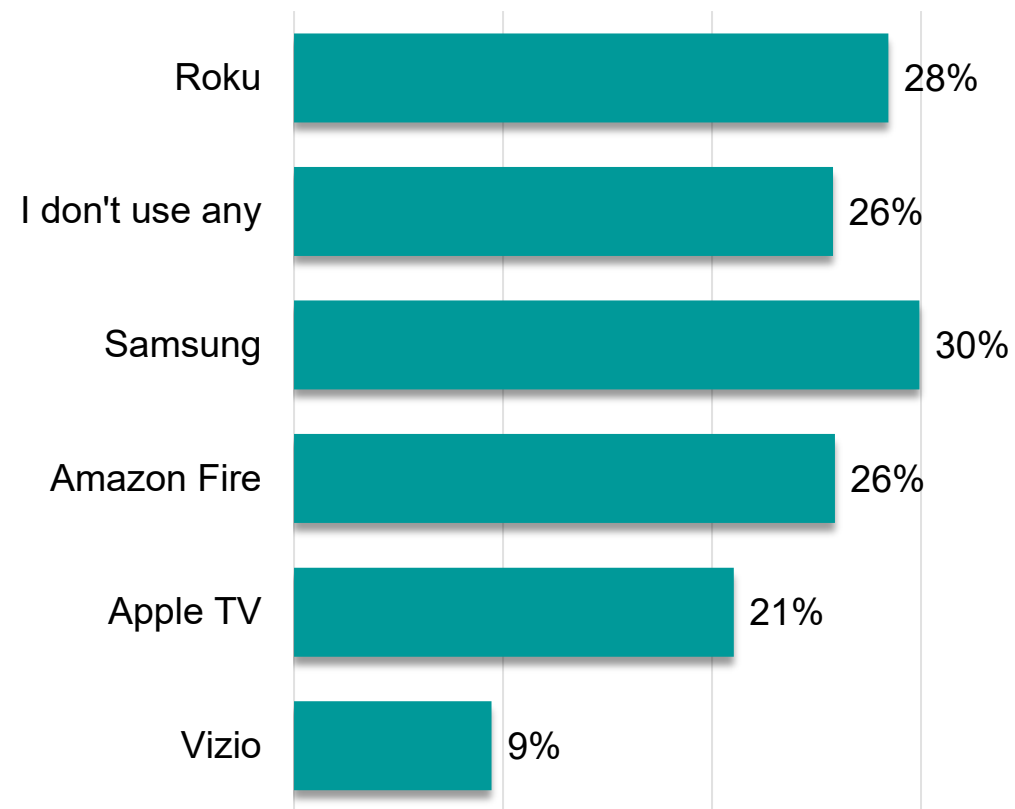
Sample Size: n=1,862

# U.S. Media Consumption

## Streaming Platforms used Weekly



## Connected Device Used

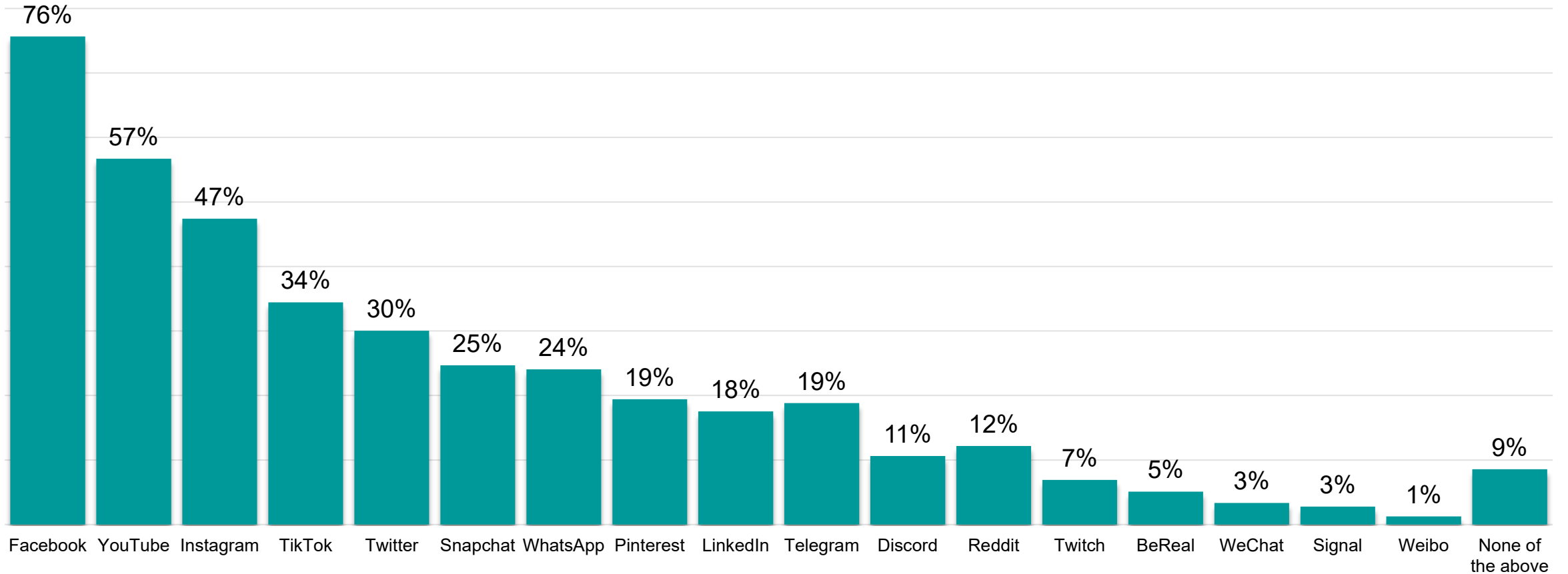


Sample Size: n=1,862

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=1,862

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

TV Program/Documentary	24%
Online	35%
Radio	12%
TV commercials	30%
Newspaper	13%
Friends/Family	42%
Social Media	39%
YouTube	37%
Out of home advertising (e.g. Poster Billboards, bus shelter advertisements, etc.)	10%
Email	19%
I don't recall	11%

## Actions Taken After Seeing an Ad for a Destination

I go to the destination's website	31%
I search for information about the destination online	45%
I look up the destination on social media	26%
I talk to friends/family about the destination	36%
I book travel to the destination almost immediately	14%
I don't do anything	14%
None of the above	8%

Sample Size: n=1,862