# **VISION INSIGHTS**

Vision Insights U.S. Traveler Profiles April 2023

May 22, 2023





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 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

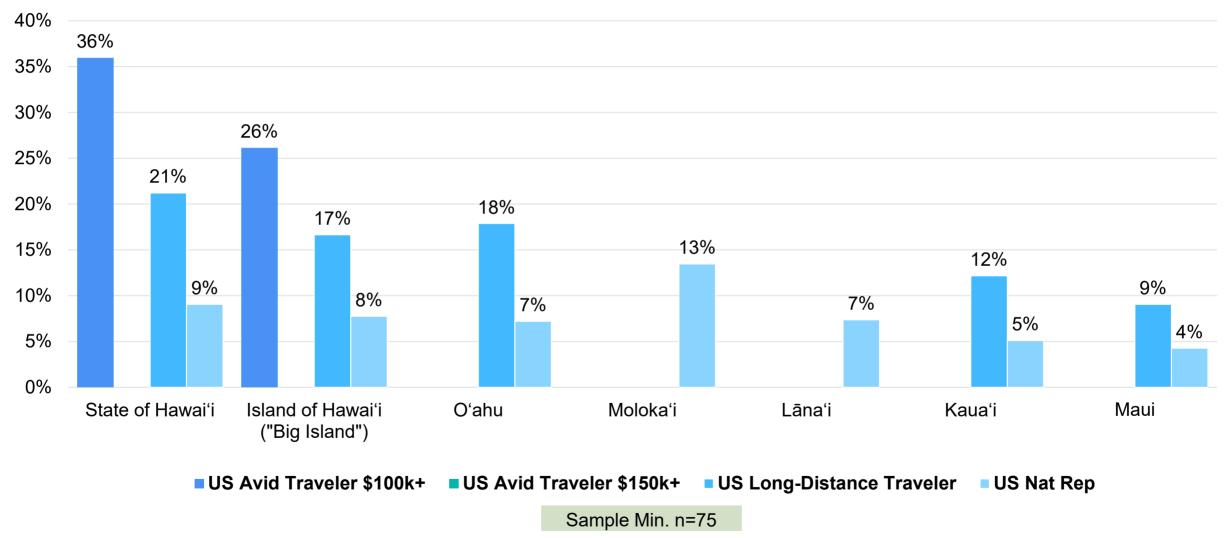
#### Avid Traveler \$150k+

- 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)

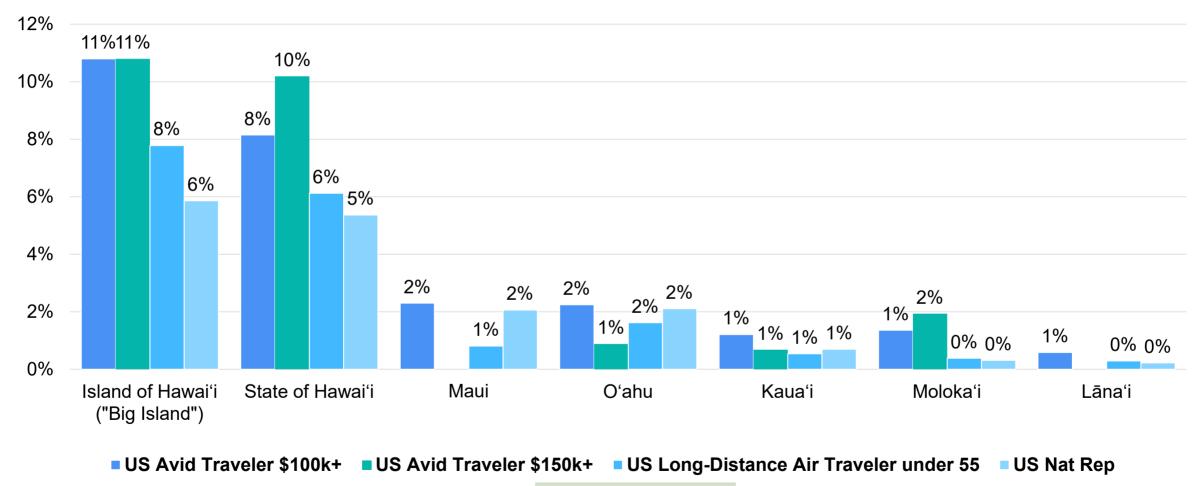
• Representative of U.S. adults in terms of age, gender, social class and education

### Leisure Trip - In Past 12 Months



Note: US Avid Traveler \$150k+ sample size is too small

### Leisure Trip – Next Destination

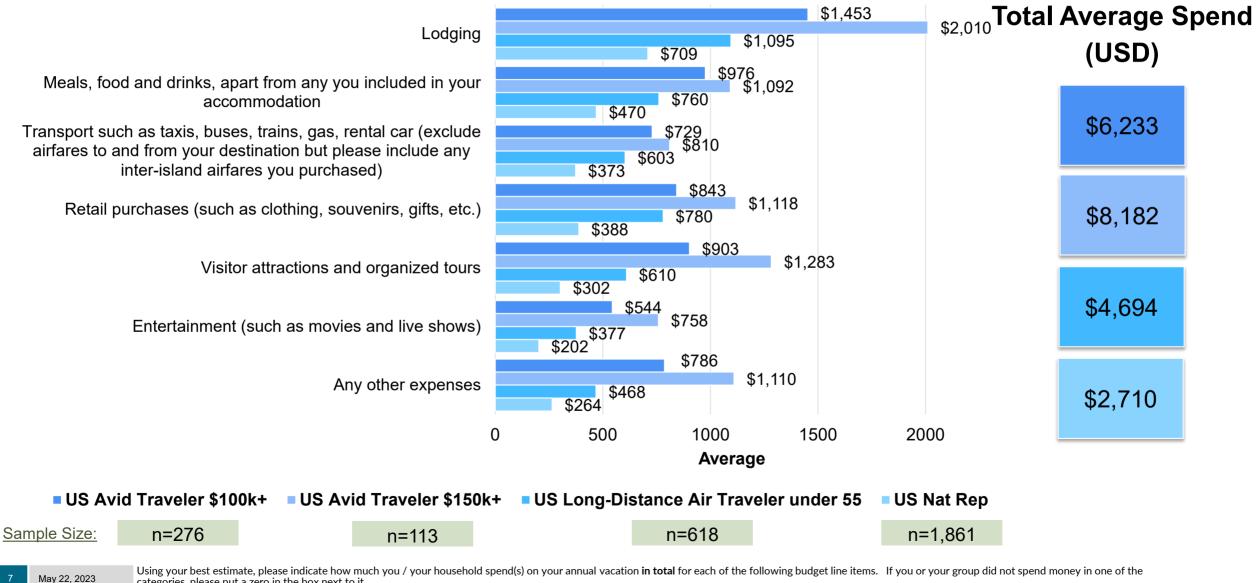


Sample Min. n=75

### Top 10 States of Residence by Segment

	US Avid Traveler \$100K 25-54		US Avid Traveler \$150K 25-54		<b>US Long-Dista</b> <b>Traveler</b> Under 55		US Nat Rep	
		%		%		%		%
	New York	21.0%	California	9.0%	New York	14.2%	California	9.0%
	California	15.2%	New York	8.6%	California	11.5%	New York	8.6%
	Texas	6.9%	Texas	8.2%	Texas	9.0%	Texas	8.2%
	Georgia	5.4%	Florida	7.4%	Florida	6.0%	Florida	7.4%
	Illinois	4.8%	Colorado	4.2%	Georgia	4.6%	Georgia	4.8%
	Pennsylvania	4.8%	Pennsylvania	4.1%	Illinois	4.3%	North Carolina	4.3%
	Florida	3.1%	Illinois	3.4%	Pennsylvania	3.5%	Ohio	4.2%
	Washington	2.9%	Virginia	2.7%	Virginia	3.1%	Pennsylvania	4.1%
	Minnesota	1.7%	Washington	2.0%	Washington	2.4%	Illinois	3.4%
	Virginia 1.0%		New Jersey	1.9%	Minnesota	2.3%	Virginia	2.7%
Size:	n=276		n=113		n=618		n=1,861	

## **Total Annual Holiday Spend**

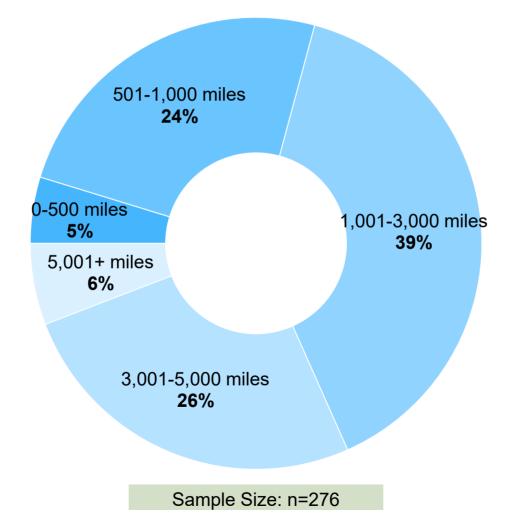


categories, please put a zero in the box next to it.

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

May 22, 2023

#### **Distance Travelled on Annual Vacation**



How far do you normally travel for your annual vacation? | Typically, for how many nights do you travel for your annual vacation? | Including yourself, how many individuals typically travel with you on your annual vacation? | Using your best estimate, please indicate how much you / your household spend(s) on your annual vacation in total for each of the following budget line items. If you or your group did not spend money in one of the categories, please put a zero in the box next to it.

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

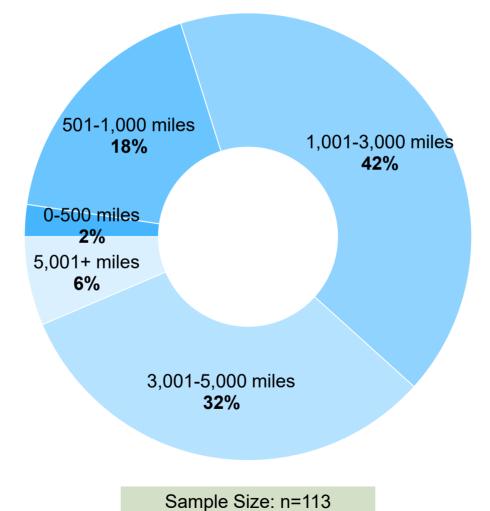
#### **Average Spend Spend Per Person Per Day** \$1,453.23 Lodging 7.2 Meals, food and drinks, apart from any you included in \$975.78 Ave # Nights on Annual Vacation your accommodation \$902.57 Visitor attractions and organized tours 4.0Retail purchases (such as clothing, souvenirs, gifts, \$842.59 etc.) Ave # of People on Annual Vacation Transport such as taxis, buses, trains, gas, rental car \$729.28 (exclude airfares to and from your destination but please include any inter-island airfares you purchased) \$543.68 Entertainment (such as movies and live shows) \$216.57 \$786.20 Any other expenses Ave. Per Person Per Day Spend Sample Size: n=276

May 22, 2023

How far do you normally travel for your annual vacation? | Typically, for how many nights do you travel for your annual vacation? | Including yourself, how many individuals typically travel with you on your annual vacation? | Using your best estimate, please indicate how much you / your household spend(s) on your annual vacation in total for each of the following budget line items. If you or your group did not spend money in one of the categories, please put a zero in the box next to it.

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

#### **Distance Travelled on Annual Vacation**



How far do you normally travel for your annual vacation? | Typically, for how many nights do you travel for your annual vacation? | Including yourself, how many individuals typically travel with you on your annual vacation? | Using your best estimate, please indicate how much you / your household spend(s) on your annual vacation **in total** for each of the following budget line items. If you or your group did not spend money in one of the categories, please put a zero in the box next to it.

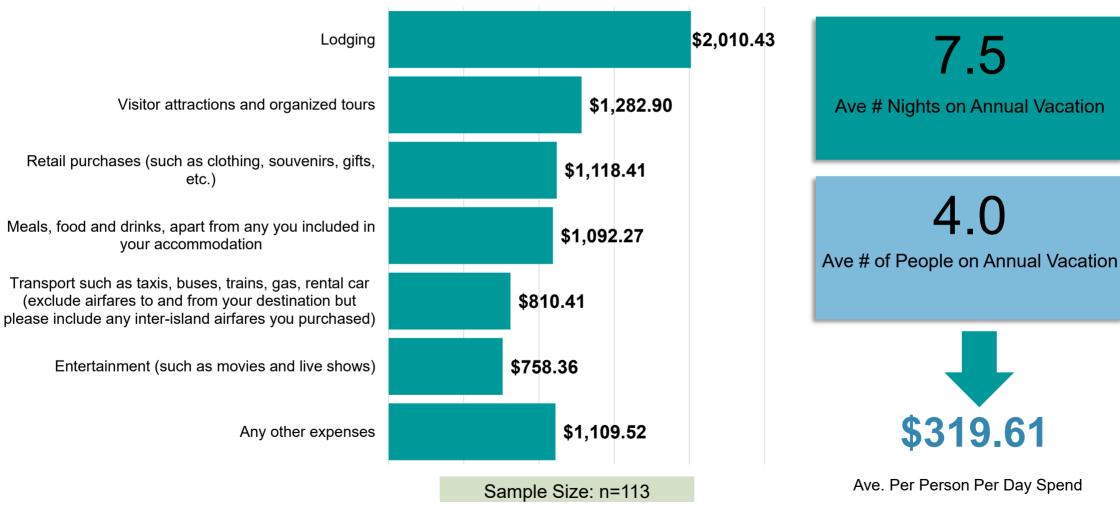
10 May 22, 2023

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

#### **Average Spend**

May 22, 2023

#### **Spend Per Person Per Day**

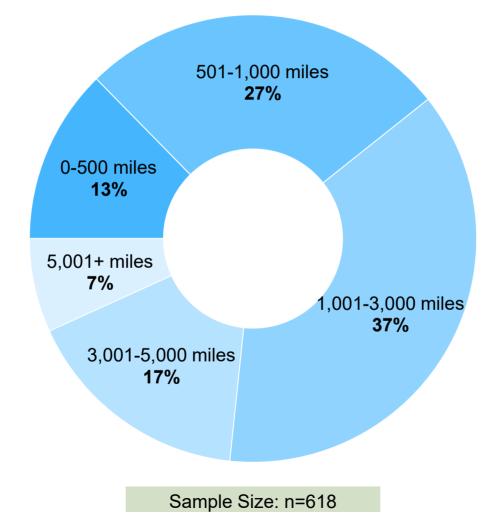


How far do you normally travel for your annual vacation? | Typically, for how many nights do you travel for your annual vacation? | Including yourself, how many individuals typically travel with you on your annual vacation? | Using your best estimate, please indicate how much you / your household spend(s) on your annual vacation **in total** for each of the following budget line items. If you or your group did not spend money in one of the categories, please put a zero in the box next to it.

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

May 22, 2023

#### **Distance Travelled on Annual Vacation**



How far do you normally travel for your annual vacation? | Typically, for how many nights do you travel for your annual vacation? | Including yourself, how many individuals typically travel with you on your annual vacation? | Using your best estimate, please indicate how much you / your household spend(s) on your annual vacation in total for each of the following budget line items. If you or your group did not spend money in one of the categories, please put a zero in the box next to it.

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

#### **Average Spend**

#### **Spend Per Person Per Day**

5.6

3.0



How far do you normally travel for your annual vacation? | Typically, for how many nights do you travel for your annual vacation? | Including yourself, how many individuals typically travel with you on your annual vacation? | Using your best estimate, please indicate how much you / your household spend(s) on your annual vacation in total for each of the following budget line items. If you or your group did not spend money in one of the categories, please put a zero

Meals, food and drinks, apart from any you included in

Transport such as taxis, buses, trains, gas, rental car (exclude airfares to and from your destination but please include any inter-island airfares you purchased)

in the box next to it.

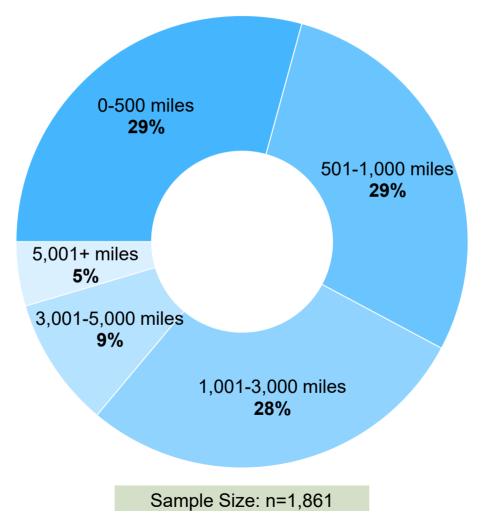
Entertainment (such as movies and live shows)

#### May 22, 2023

### U.S. Nat Rep: Annual Vacation

May 22, 2023

#### **Distance Travelled on Annual Vacation**



How far do you normally travel for your annual vacation? | Typically, for how many nights do you travel for your annual vacation? | Including yourself, how many individuals typically travel with you on your annual vacation? | Using your best estimate, please indicate how much you / your household spend(s) on your annual vacation **in total** for each of the following budget line items. If you or your group did not spend money in one of the categories, please put a zero in the box next to it.

## U.S. Nat Rep: Annual Vacation

#### **Average Spend**

#### Spend Per Person Per Day



How far do you normally travel for your annual vacation? | Typically, for how many nights do you travel for your annual vacation? | Including yourself, how many individuals typically travel with you on your annual vacation? | Using your best estimate, please indicate how much you / your household spend(s) on your annual vacation **in total** for each of the following budget line items. If you or your group did not spend money in one of the categories, please put a zero in the box next to it.

### **Importance of Travel Factors**

		Very Impoi	rtant 5	
	US: Avid Traveler \$100k+	US: Avid Traveler \$150k+	US: Long-Distance Air Traveler under 55	US Market
Value for money	50%	52%	47%	51%
Comfort and accessibility	57%	58%	49%	50%
Natural attractions/activities	58%	58%	52%	45%
Family friendly locations and activities	50%	45%	47%	43%
Opportunity to experience local restaurants/businesses	49%	50%	45%	41%
Cultural attractions	58%	60%	48%	40%
Entertainment and nightlife	48%	49%	44%	35%
Consideration of sustainable principles	43%	44%	39%	32%
Sample Size:	n=276	n=113	n=618	n=1,861

### 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	50%	57%	58%	50%	49%	58%	48%	43%
■4	32%	31%	30%	31%	35%	27%	34%	35%
3	14%	7%	8%	14%	12%	10%	11%	16%
2	3%	2%	3%	3%	3%	3%	5%	2%
Not very Important 1	2%	2%	2%	2%	2%	2%	2%	3%

Not very Important 1 2 3 4 Very Important 5

Sample Size: n=276

May 22, 2023

### 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	52%	58%	58%	45%	50%	60%	49%	44%
■ 4	28%	31%	30%	32%	32%	21%	30%	28%
■3	16%	8%	7%	14%	12%	12%	14%	20%
2	2%	1%	4%	6%	4%	5%	5%	4%
Not very Important 1	2%	2%	2%	3%	3%	3%	2%	3%

Not very Important 1 2 Very Important 5

Sample Size: n=113

May 22, 2023

### 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	47%	49%	52%	47%	45%	48%	44%	39%
■ 4	28%	33%	28%	28%	31%	29%	31%	33%
■3	17%	12%	14%	17%	16%	15%	17%	21%
2	5%	4%	4%	6%	5%	6%	6%	4%
Not very Important 1	2%	2%	3%	2%	3%	2%	3%	4%

Not very Important 1 2 Very Important 5

Sample Size: n=618

May 22, 2023

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

May 22, 2023

	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	51%	50%	45%	43%	41%	40%	35%	32%
■4	27%	29%	31%	26%	30%	29%	27%	27%
<b>3</b>	15%	15%	16%	19%	19%	20%	21%	26%
2	4%	3%	4%	5%	5%	6%	8%	7%
Not very Important 1	3%	3%	3%	6%	4%	5%	8%	9%

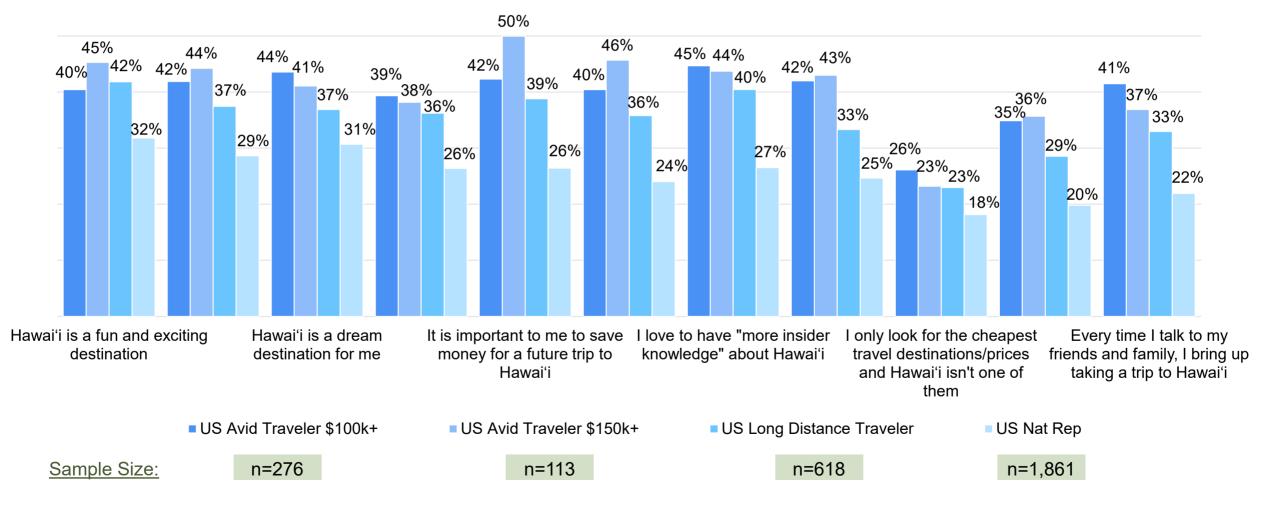
Not very Important 1 2 ■3 ■4 Very Important 5

Sample Size: n=1,861

### Hawai'i as an Aspirational Destination

#### Agreement Regarding Hawai'i as a Travel Destination

(Strongly Agree)



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

	-					
1	10%	48%		40%		
•	11%	42%		42%		
•	12%	40%		44%		
i	12%	45%	, D	39%		
i	11%	41%		42%		
i	12%	42%	6	40%		
	10%	41%		45%		
i	12%	43%		42%		
1	15% 1	0% 15%	34%	26%		
i	16%		43%	35%		
i	7% 15%	36	\$%	41%		
i	7% 15%	36	5%	41%		

Hawai'i is a fun and exciting destination I am open to spending money to go to Hawai'i as long as it's affordable Hawai'i is a dream destination for me I am always looking for new experiences such as Hawai'i It is important to me to save money for a future trip to Hawai'i My love for travel is a major reason why I want to go to Hawai'i I love to have "more insider knowledge" about Hawai'i I enjoy watching travel documentaries about Hawai'i I only look for the cheapest travel destinations/prices and Hawai'i isn't one of them I use every possible medium to stay connected to Hawai'i Every time I talk to my friends and family, I bring up taking a trip to Hawai'i

Strongly disagree Disagree Neither agree nor disagree Agree Strongly agree

Sample Size: n=276

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

#### **Agreement Regarding Hawai'i as an Aspirational Destination**

14%	39%	45%
<mark>5%</mark> 18%	34%	44%
15%	38%	41%
17%	42%	38%
14%	31%	50%
17%	33%	46%
12%	40%	44%
15%	39%	43%
22%	10% 16%	29% 23%
5% 20%	37%	36%
8% 16%	37%	37%

Hawai'i is a fun and exciting destination I am open to spending money to go to Hawai'i as long as it's affordable Hawai'i is a dream destination for me I am always looking for new experiences such as Hawai'i It is important to me to save money for a future trip to Hawai'i My love for travel is a major reason why I want to go to Hawai'i I love to have "more insider knowledge" about Hawai'i I enjoy watching travel documentaries about Hawai'i I only look for the cheapest travel destinations/prices and Hawai'i isn't one of them I use every possible medium to stay connected to Hawai'i Every time I talk to my friends and family, I bring up taking a trip to Hawai'i

Strongly disagree Disagree Neither agree nor disagree Agree Strongly agree

Sample Size: n=113

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

#### **Agreement Regarding Hawai'i as an Aspirational Destination**

n	15%		40%		42%				
е	16%		41%		37%				
е	5% 17	<b>′%</b>	38%		37%				
ʻi	15%		43%		36%				
ʻi	5% 19%		34%		39%				
ʻi	6% 19	9%	37%	,	36%	)			
ʻi	18%	6	36%		40%				
ʻi	6% 18	3%	40%	6	33%	6			
n	9% 139	%	25%	30%	)	23%			
ʻi	9% 25%			36%	29	9%			
ʻi	10% 20%		3	4%	33%				

Hawai'i is a fun and exciting destination I am open to spending money to go to Hawai'i as long as it's affordable Hawai'i is a dream destination for me I am always looking for new experiences such as Hawai' It is important to me to save money for a future trip to Hawai' My love for travel is a major reason why I want to go to Hawai' I love to have "more insider knowledge" about Hawai' I enjoy watching travel documentaries about Hawai I only look for the cheapest travel destinations/prices and Hawai'i isn't one of them I use every possible medium to stay connected to Hawai' Every time I talk to my friends and family, I bring up taking a trip to Hawai'

Strongly disagree Disagree Neither agree nor disagree Agree Strongly agree

Sample Size: n=618

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

#### **Agreement Regarding Hawai'i as an Aspirational Destination**

ation	22%			41%		32%
able	<mark>5%</mark> 5%	21%		40%		29%
r me	6% 6%	23%		34%		31%
wai'i	6% 5%	26%		37%		26%
wai'i	7% 8%	25%	)	34%	)	26%
wai'i	6% 10%	269	%	34	%	24%
waiʻi	5% 6%	25%		37%		27%
wai'i	6% 8%	27%		35%	6	25%
hem	10% 1	3%	30%		29%	18%
waiʻi	10%	14%	30%		26%	20%
waiʻi	13%	15%	24%		26%	22%

Hawai'i is a fun and exciting destina I am open to spending money to go to Hawai'i as long as it's affordated Hawai'i is a dream destination for I am always looking for new experiences such as Haw It is important to me to save money for a future trip to Hav My love for travel is a major reason why I want to go to Haw I love to have "more insider knowledge" about Hav I enjoy watching travel documentaries about Haw I only look for the cheapest travel destinations/prices and Hawai'i isn't one of th I use every possible medium to stay connected to Hav Every time I talk to my friends and family, I bring up taking a trip to Hav

Strongly disagree Disagree Neither agree nor disagree Agree Strongly agree

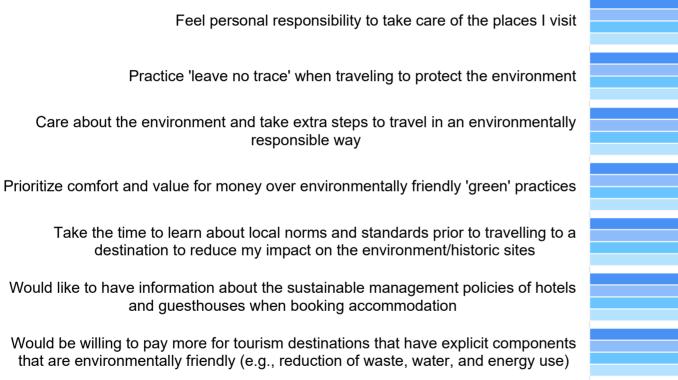
Sample Size: n=1,861

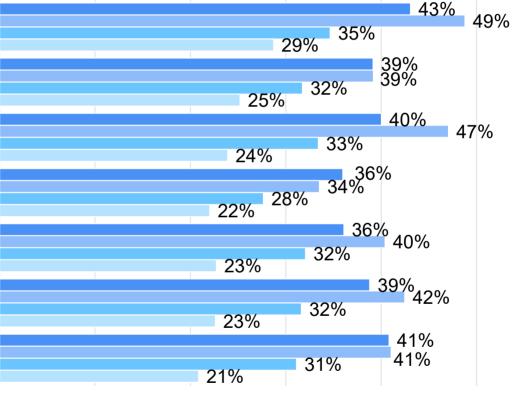
May 22, 2023

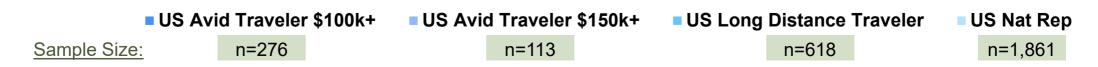
## Sustainability and Travel Responsibility Statements

Agreement Regarding Sustainable Practices While Traveling

(Strongly Agree)







#### Sustainability and Travel Responsibility Statements Agreement Regarding Sustaining Local Culture While Traveling (Strongly Agree)

I prefer to shop at local markets and/or make purchases from local artisans & crafts people while traveling

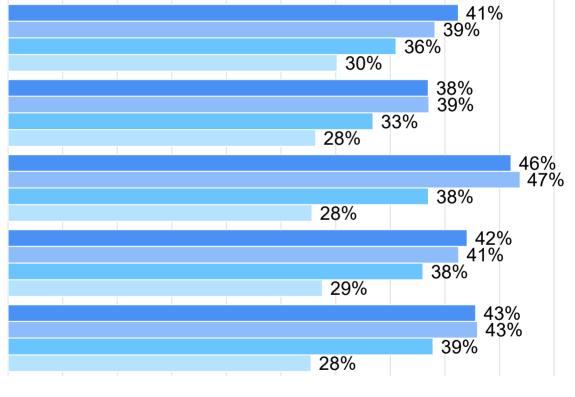
I would like to be offered locally sourced food and drink where possible

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

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

#### **Agreement Regarding Sustainable Practices While Traveling**

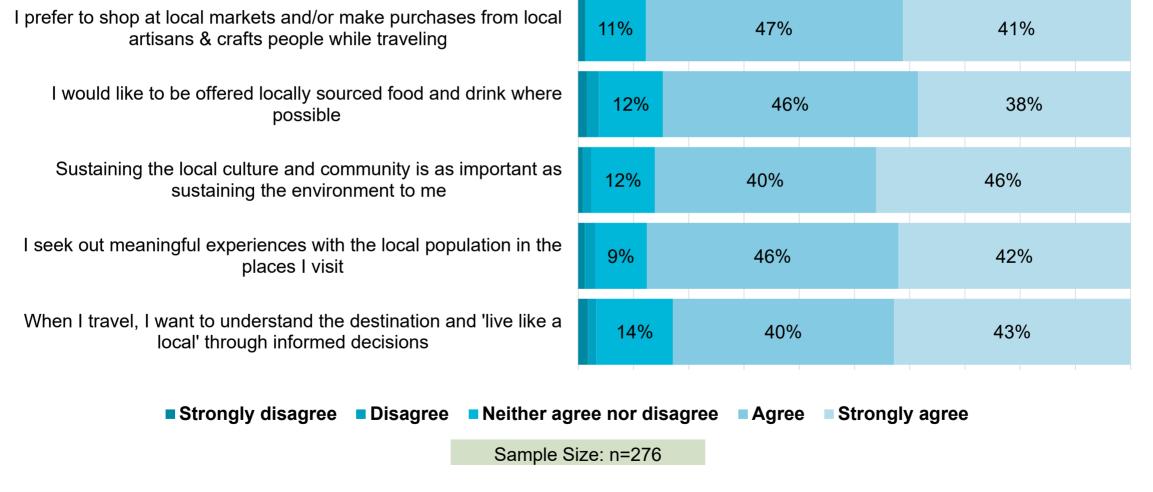
Feel personal responsibility to take care of the places I visit	9%	44%	43%
Practice 'leave no trace' when traveling to protect the environment	13%	44%	39%
Care about the environment and take extra steps to travel in an environmentally responsible way	12%	42%	40%
Prioritize comfort and value for money over environmentally friendly 'green' practices	9% 12%	39%	36%
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	11%	48%	36%
Would like to have information about the sustainable management policies of hotels and guesthouses when booking accommodation	12%	44%	39%
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)	11%	42%	41%
Strongly disagree	e nor disagree	Agree Strong	y agree

Sample Size: n=276

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

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#### Agreement Regarding Sustaining Local Culture While Traveling



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

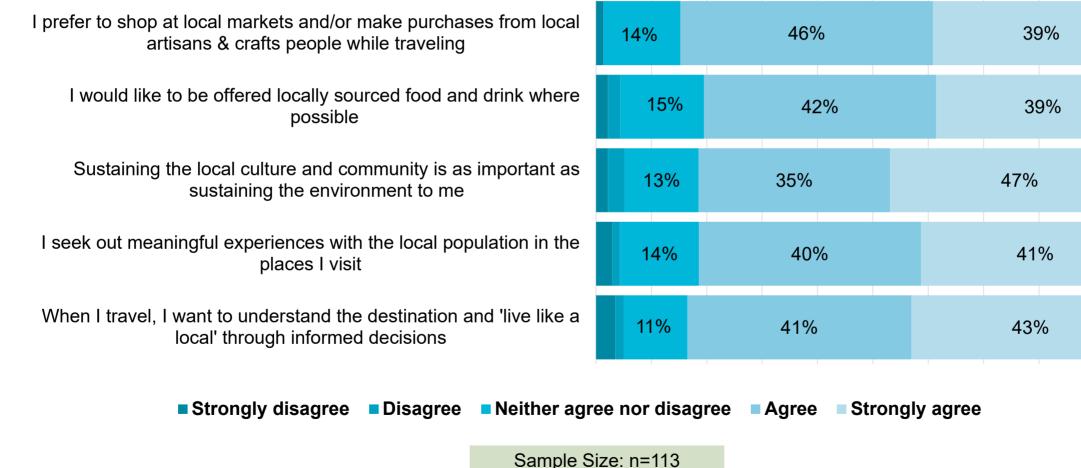
#### **Agreement Regarding Sustainable Practices While Traveling**

Feel personal responsibility to take care of the places I visit		10%		36%		49%		
Practice 'leave no trace' when traveling to protect the environment	5%	5 16	5%		39%		39	9%
Care about the environment and take extra steps to travel in an environmentally responsible way		13	%		35%		47%	
Prioritize comfort and value for money over environmentally friendly 'green' practices	7%	6%		19%	34%	<b>6</b>		34%
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		17	%		38%		40	)%
Would like to have information about the sustainable management policies of hotels and guesthouses when booking accommodation	69	%	18%		32%		42	%
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)	15%		36%		41%			
Strongly disagree	ee n	nor di	sagı	.ee 🗖	Agree Stro	ongly a	gree	

Sample Size: n=113

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

#### Agreement Regarding Sustaining Local Culture While Traveling



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

#### **Agreement Regarding Sustainable Practices While Traveling**

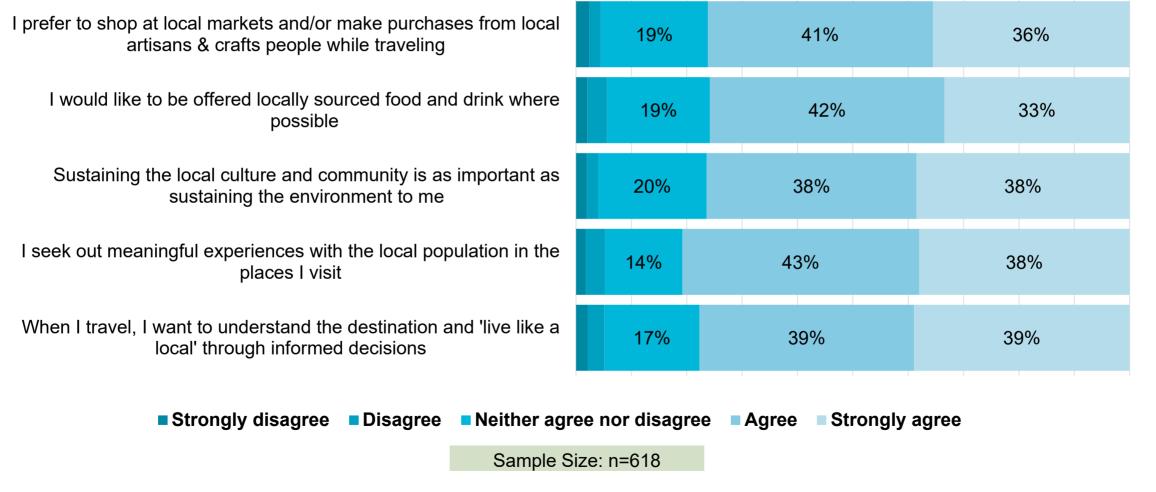
Feel personal responsibility to take care of the places I visit	4%	13%	45%	35%	
Practice 'leave no trace' when traveling to protect the environment	6%	16%	43%	32%	
Care about the environment and take extra steps to travel in an environmentally responsible way	5%	18%	41%	33%	
Prioritize comfort and value for money over environmentally friendly 'green' practices	9%	ó 19	9% 40%	28%	
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	5%	18%	42%	32%	
Would like to have information about the sustainable management policies of hotels and guesthouses when booking accommodation	6%	18%	42%	32%	
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)	8%	18%	6 39%	31%	
Strongly disagree Disagree Neither agree nor disagree Agree Strongly agree					

Sample Size: n=618

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

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#### Agreement Regarding Sustaining Local Culture While Traveling



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

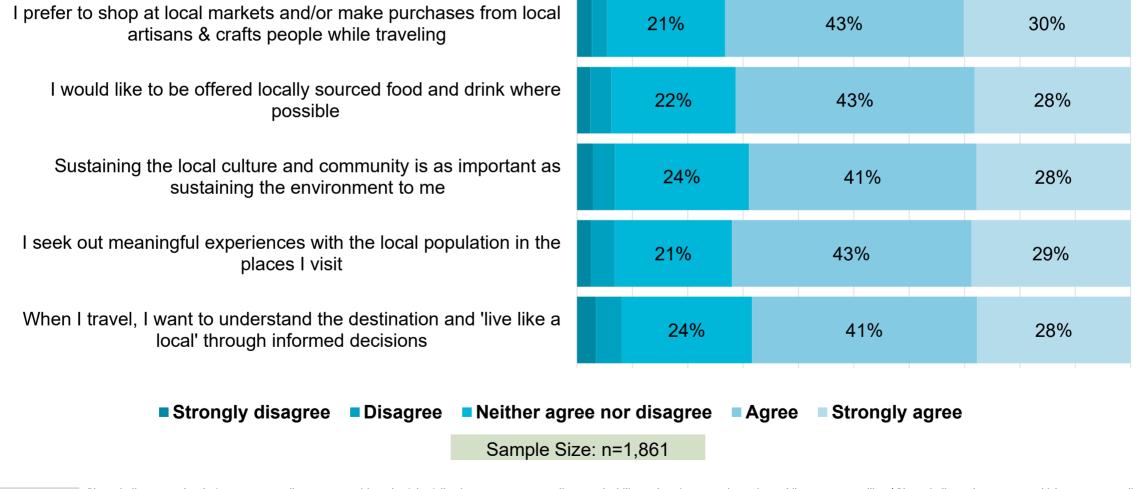
#### **Agreement Regarding Sustainable Practices While Traveling**

Feel personal responsibility to take care of the places I visit	5%	17%		47%		29%	%	
Practice 'leave no trace' when traveling to protect the environment	7%	220	%		42%	25	5%	
Care about the environment and take extra steps to travel in an environmentally responsible way	7%	24	.%		40%	24	4%	
Prioritize comfort and value for money over environmentally friendly 'green' practices	109	%	25%		38%	2	2%	
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	8%	. 2	24%		40%	2	3%	
Would like to have information about the sustainable management policies of hotels and guesthouses when booking accommodation	99	%	25%		37%	2	3%	
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)	12%		<mark>%</mark> 26%		34%		21%	
Strongly disagree Disagree Neither agree nor disagree Agree Strongly agree								

Sample Size: n=1,861

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

#### **Agreement Regarding Sustaining Local Culture While Traveling**

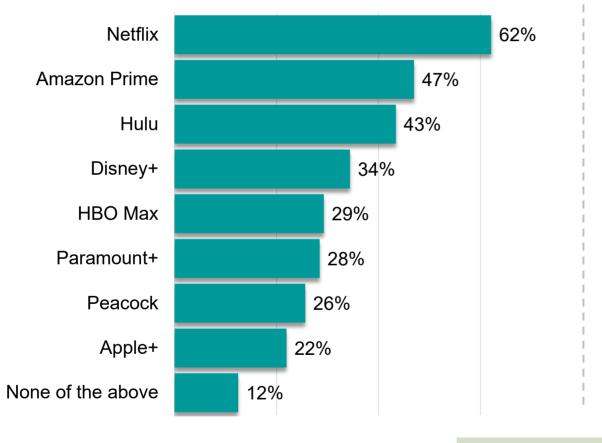


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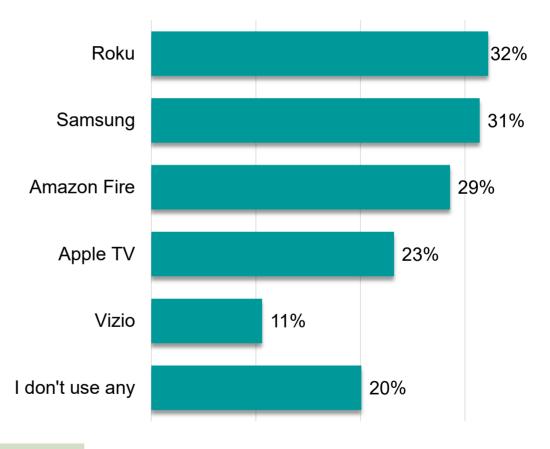
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### U.S. Media Consumption

#### **Streaming Platforms used Weekly**



#### **Connected Device Used**



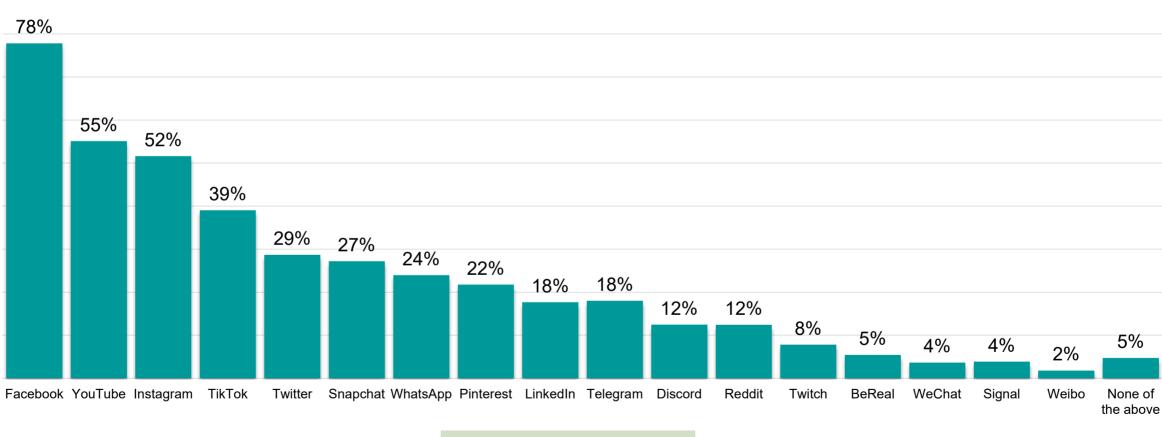
#### Sample Size: n=1,861

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** 

36 May 22, 2023

### U.S. Media Consumption

#### **Social Media Platforms used Weekly**



Sample Size: n=1,861

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**

Social Media	44%
Friends/Family	41%
YouTube	41%
Online	32%
TV commercials	28%
TV Program/Documentary	23%
Email	20%
Radio	13%
Newspaper	12%
Out of home advertising (e.g. Poster Billboards, bus shelter advertisements, etc.)	11%
I don't recall	10%

# Actions Taken After Seeing an Ad for a Destination

I search for information about the destination online	46%
I talk to friends/family about the destination	36%
I go to the destination's website	34%
I look up the destination on social media	29%
I book travel to the destination almost immediately	17%
I don't do anything	12%
None of the above	7%

#### Sample Size: n=1,861

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