



Vision Insights U.S. Traveler Profiles February 2024

March 21, 2024



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
 - 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

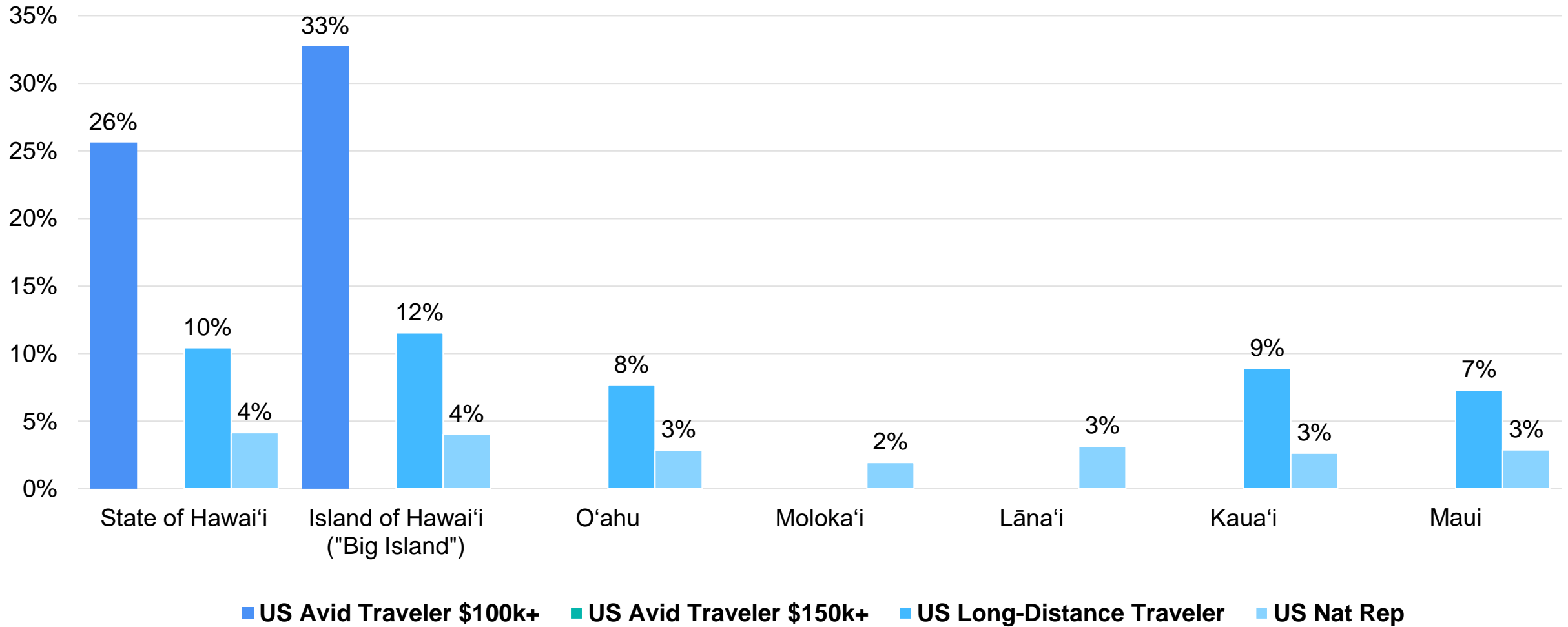
Avid Traveler \$150k+

- 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

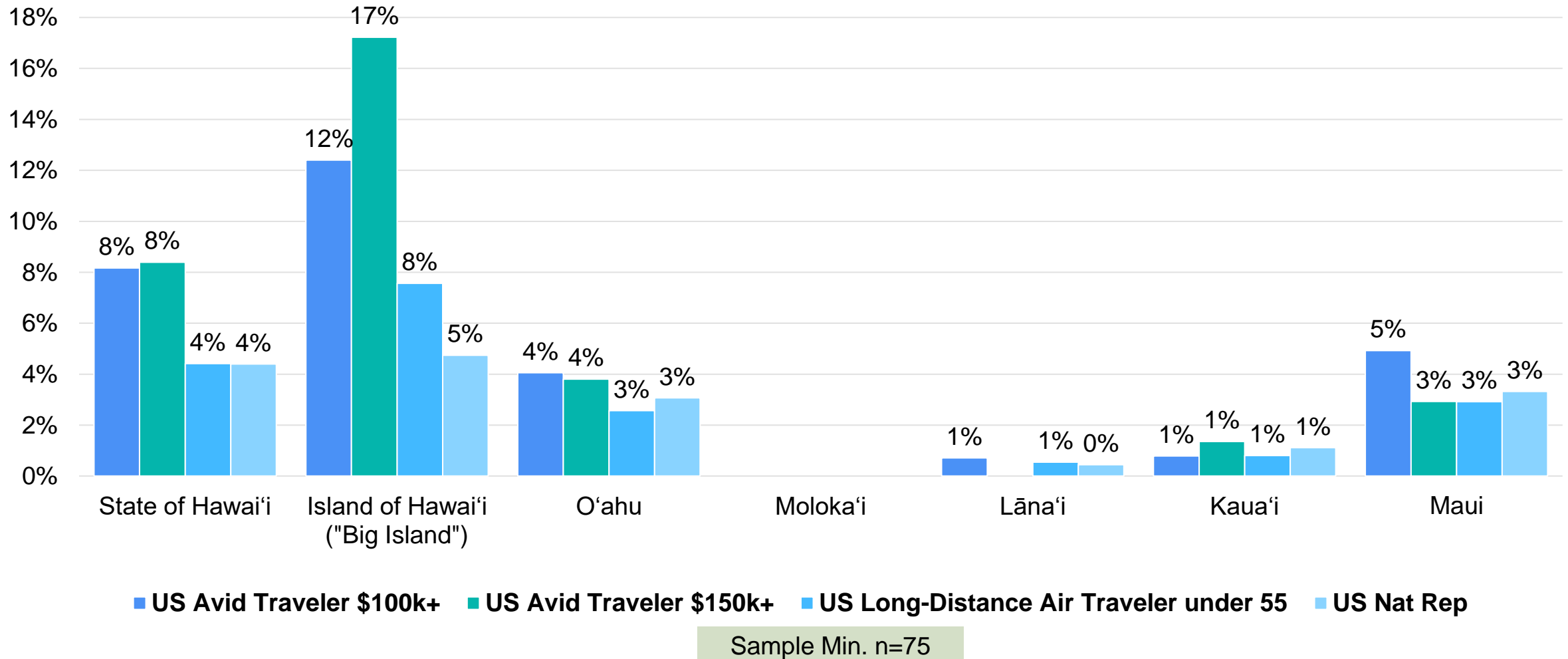
U.S. - Leisure Trip In Past 12 Months



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

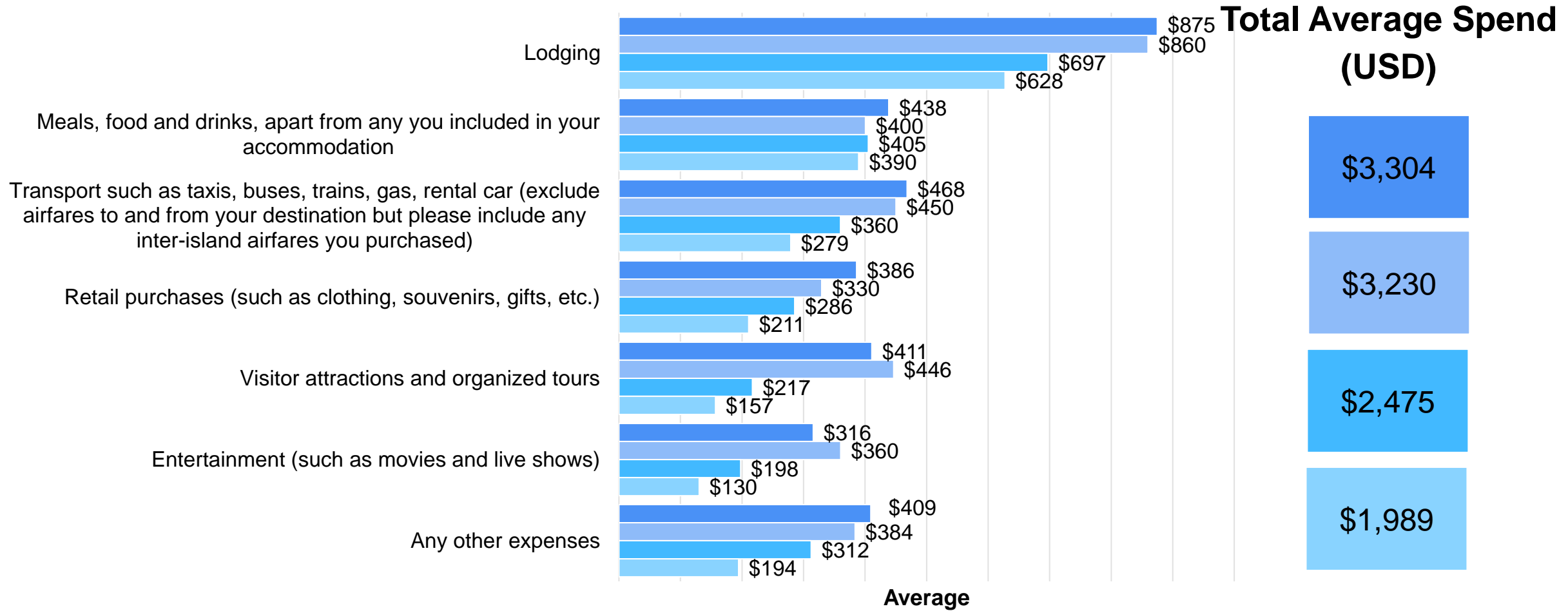
U.S. – Next Destination for Leisure Trip



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	27.0%	Texas	9.1%	New York	12.3%	Texas	9.1%
California	16.8%	New York	8.4%	California	11.1%	New York	8.4%
Texas	12.9%	Florida	7.9%	Texas	10.7%	Florida	7.9%
Florida	8.7%	California	7.0%	Florida	7.7%	California	7.0%
Pennsylvania	3.6%	Pennsylvania	5.3%	Georgia	5.4%	Pennsylvania	5.3%
Illinois	3.6%	New Jersey	3.2%	Pennsylvania	5.4%	North Carolina	4.8%
Virginia	2.4%	Illinois	2.9%	Illinois	3.6%	Georgia	4.7%
Georgia	2.2%	Virginia	2.4%	Virginia	2.5%	Ohio	4.3%
Washington	1.6%	Washington	1.7%	Washington	1.4%	Illinois	2.9%
Minnesota	0.7%	Colorado	1.2%	Minnesota	0.4%	Virginia	2.4%
Sample Size:	n=134	Sample Size:	n=77	Sample Size:	n=440	Sample Size:	n=1,801

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=134

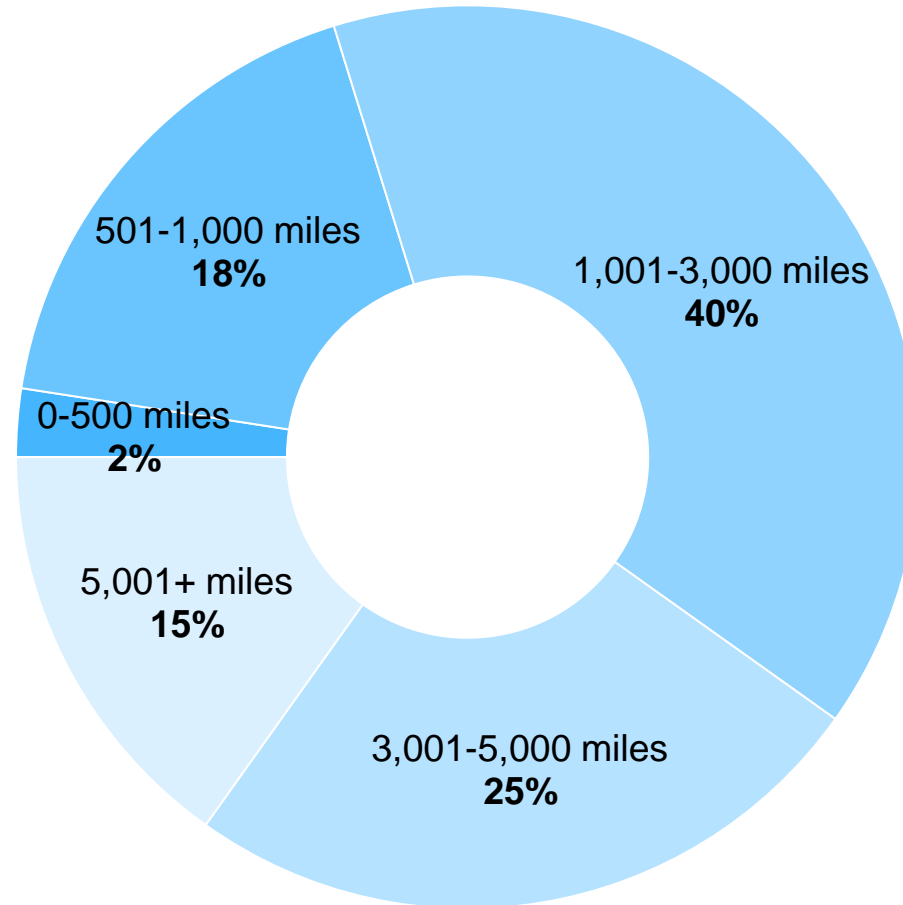
n=77

n=440

n=1,801

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

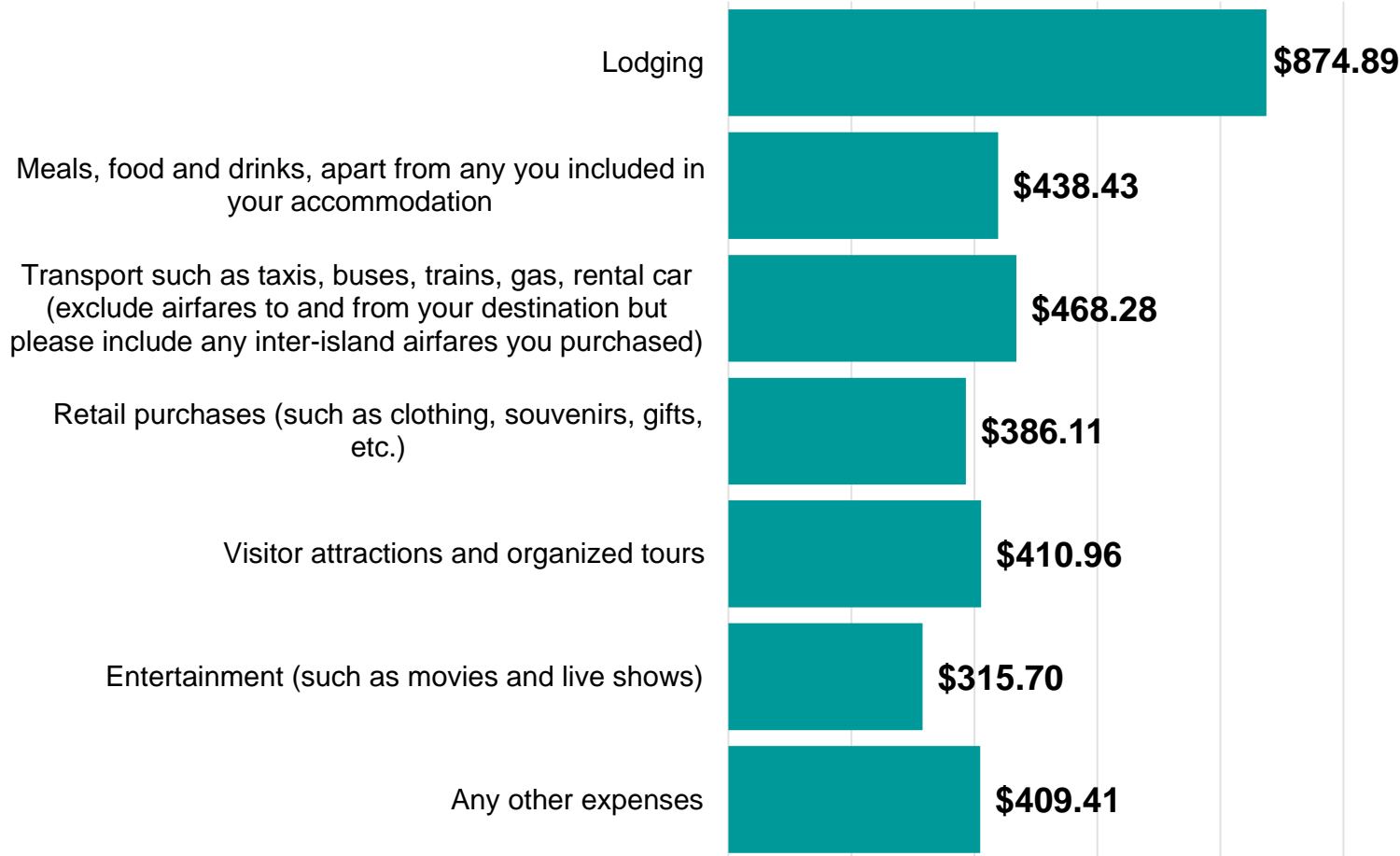
Distance Travelled on Annual Vacation



Sample Size: n=134

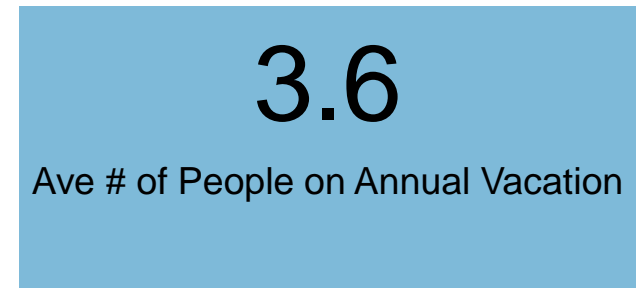
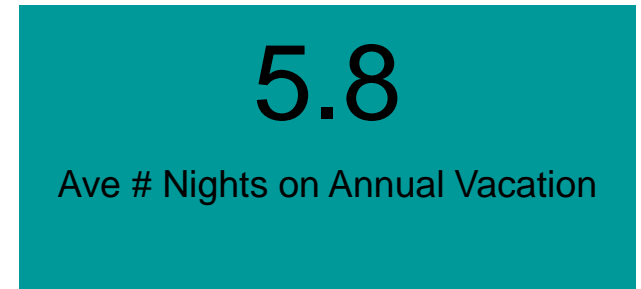
U.S. Avid Travelers \$100k+: Annual Vacation

Average Spend



Sample Size: n=134

Spend Per Person Per Day

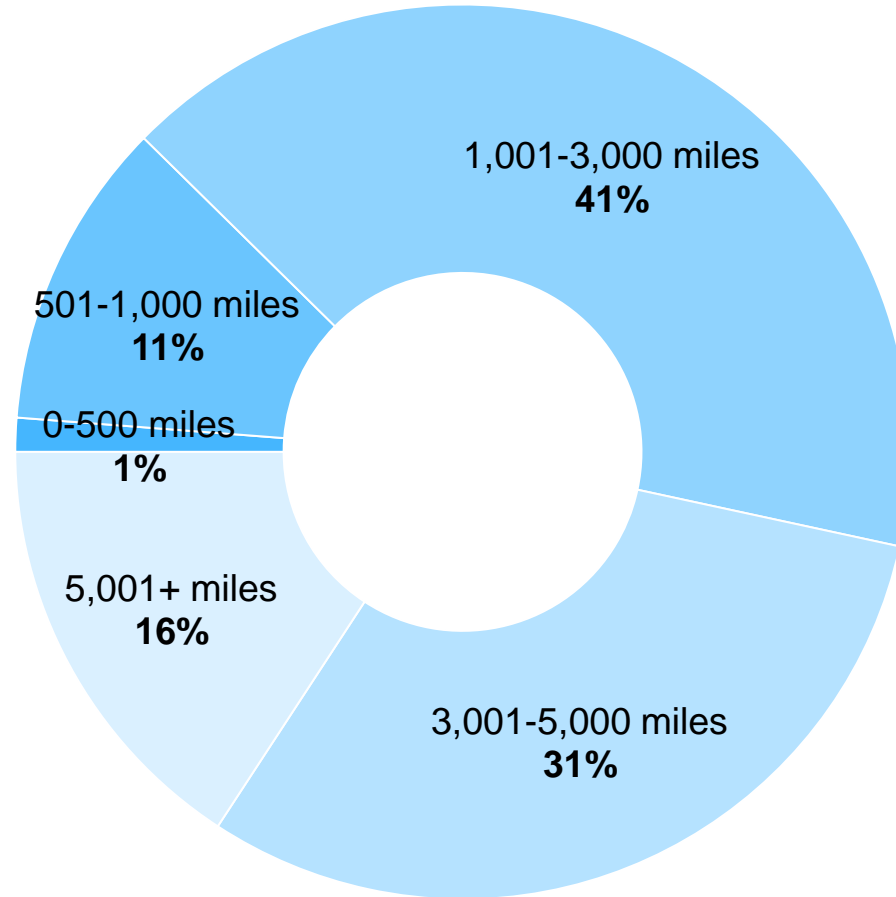


\$158.65

Ave. Per Person Per Day Spend

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

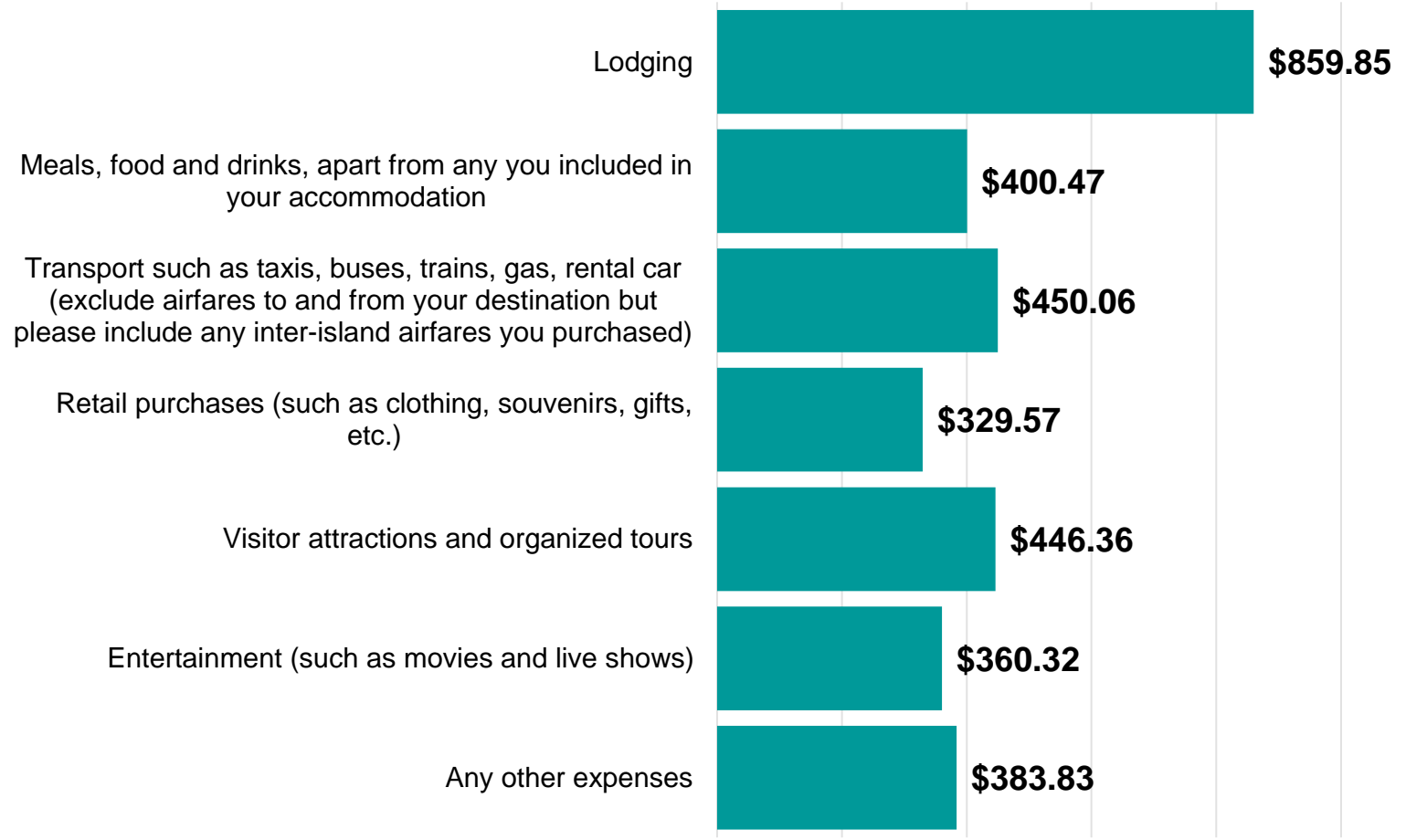
Distance Travelled on Annual Vacation



Sample Size: n=77

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

Average Spend



Sample Size: n=77

Spend Per Person Per Day

5.8
Ave # Nights on Annual Vacation

3.4
Ave # of People on Annual Vacation



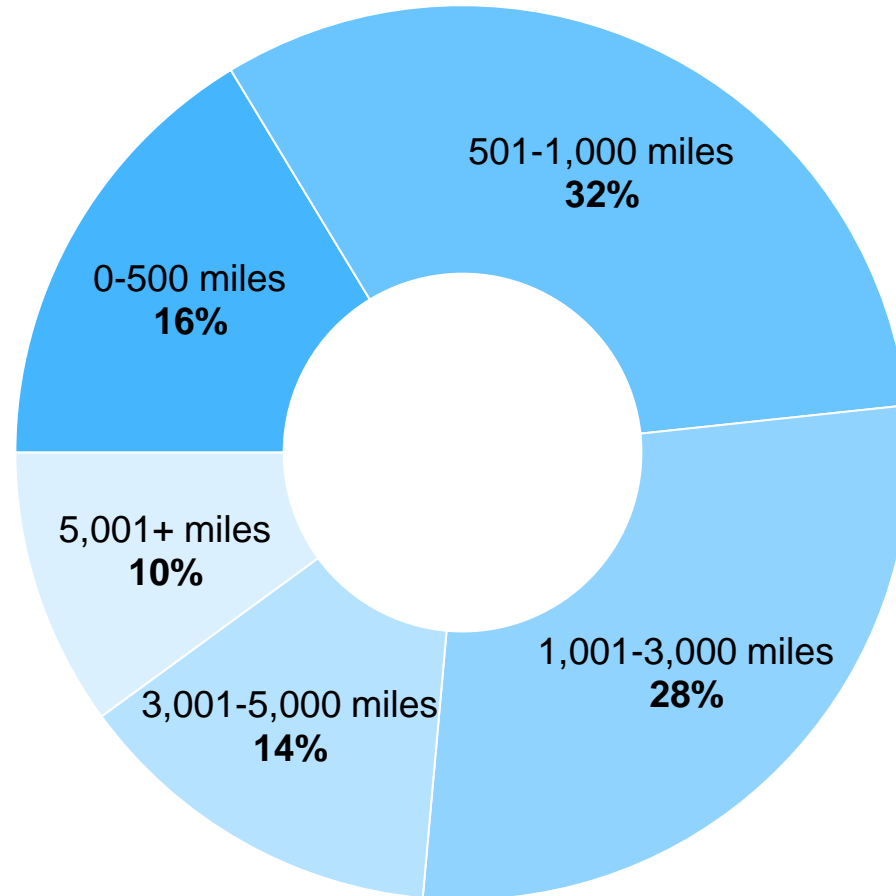
\$165.61

Ave. Per Person Per Day Spend

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

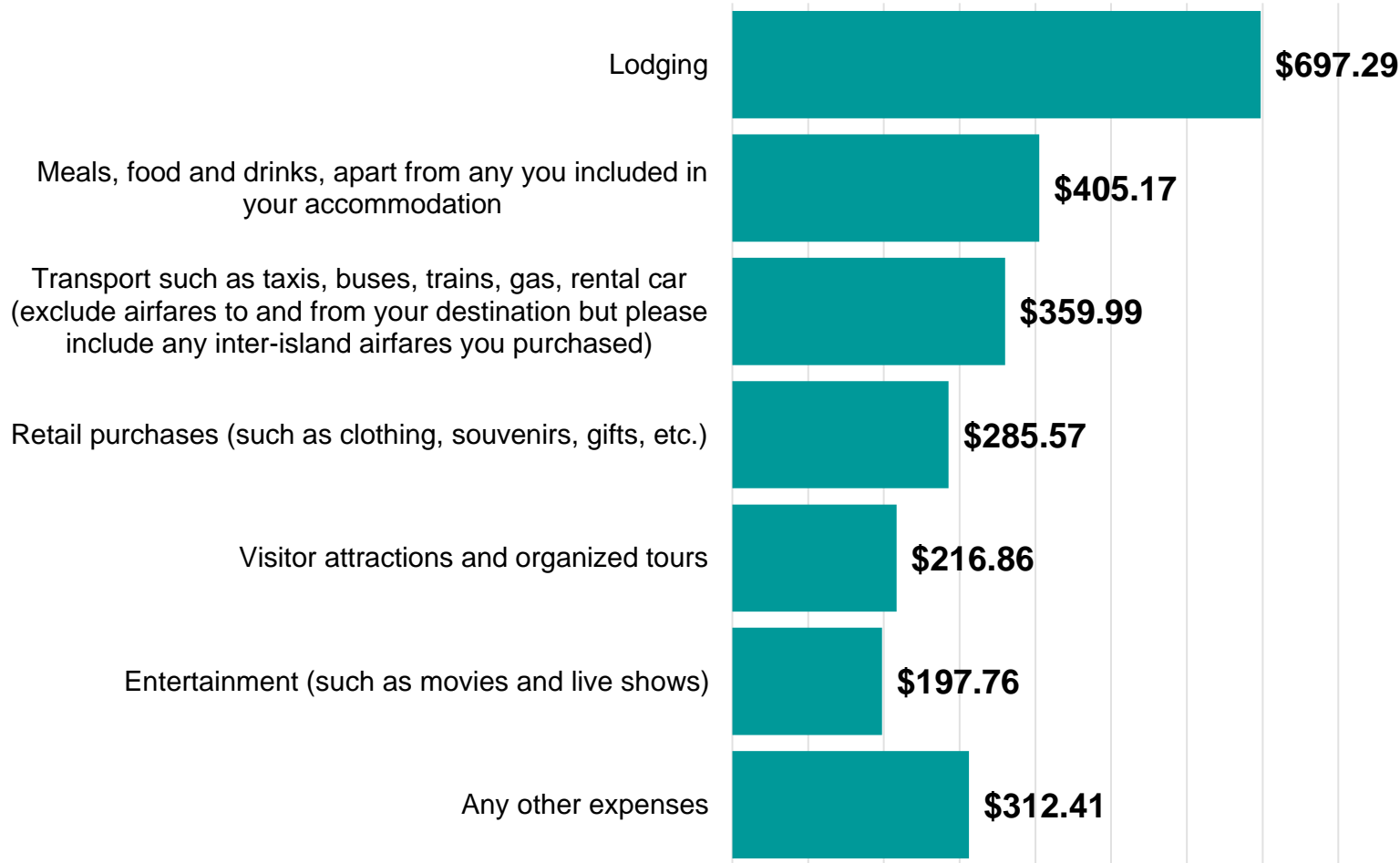
Distance Travelled on Annual Vacation



Sample Size: n=440

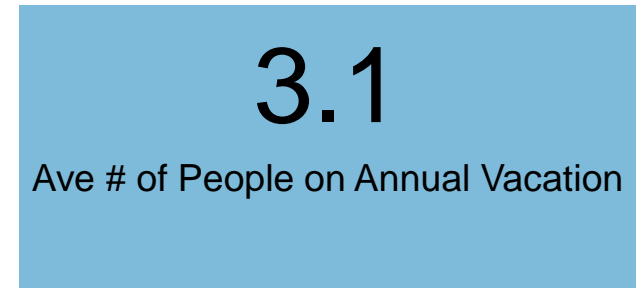
U.S. Long-Distance Travelers: Annual Vacation

Average Spend



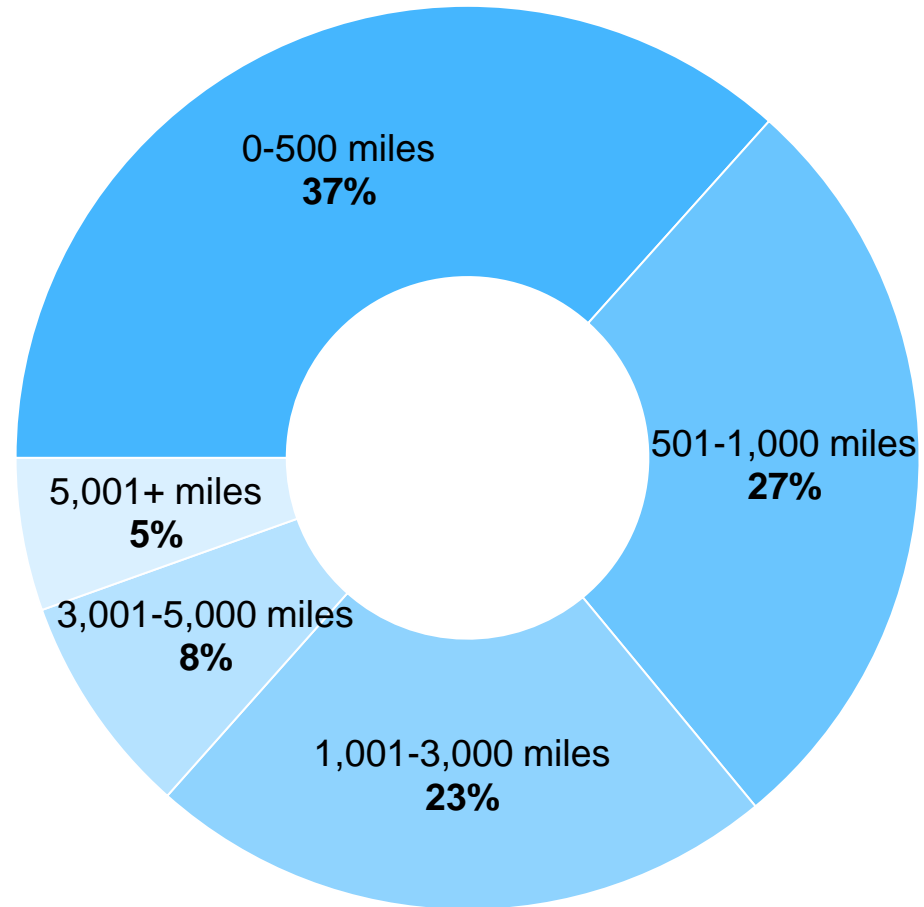
Sample Size: n=440

Spend Per Person Per Day



U.S. Nat Rep: Annual Vacation

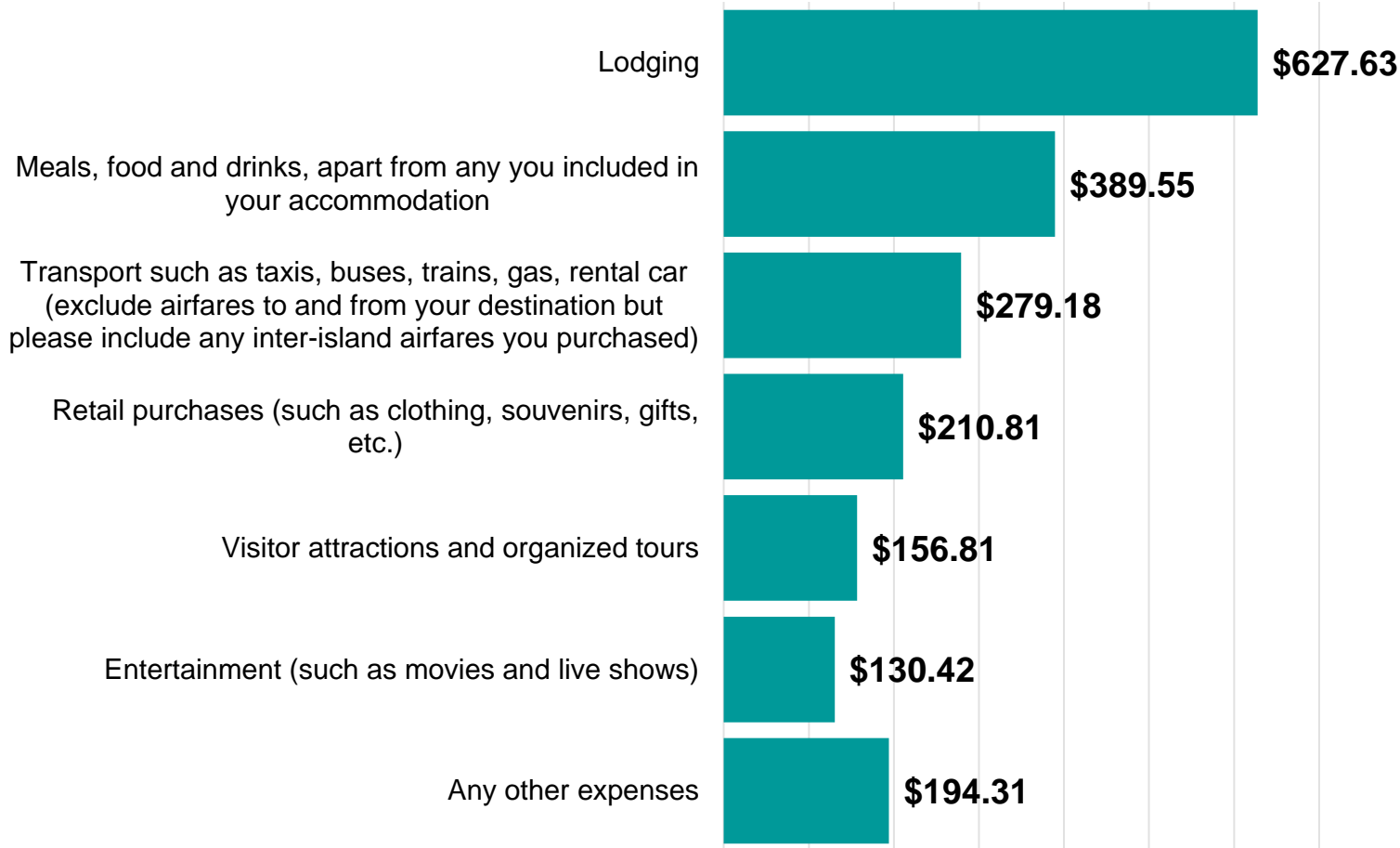
Distance Travelled on Annual Vacation



Sample Size: n=1,801

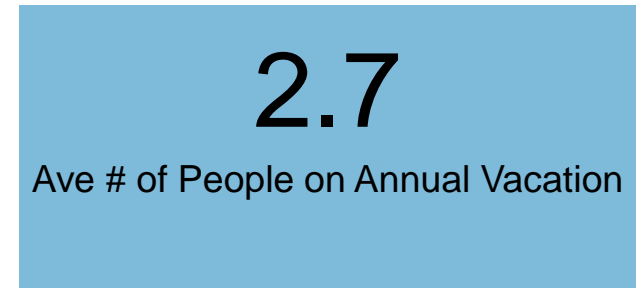
U.S. Nat Rep: Annual Vacation

Average Spend



Sample Size: n=1,801

Spend Per Person Per Day



\$139.09

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
Value for money	57%	63%	54%	55%
Comfort and accessibility	57%	63%	54%	52%
Natural attractions/activities	53%	55%	48%	44%
Family friendly locations and activities	56%	58%	48%	42%
Opportunity to experience local restaurants/businesses	50%	51%	45%	41%
Cultural attractions	54%	63%	47%	38%
Entertainment and nightlife	50%	56%	44%	31%
Consideration of sustainable principles	47%	53%	40%	29%

Sample Size:

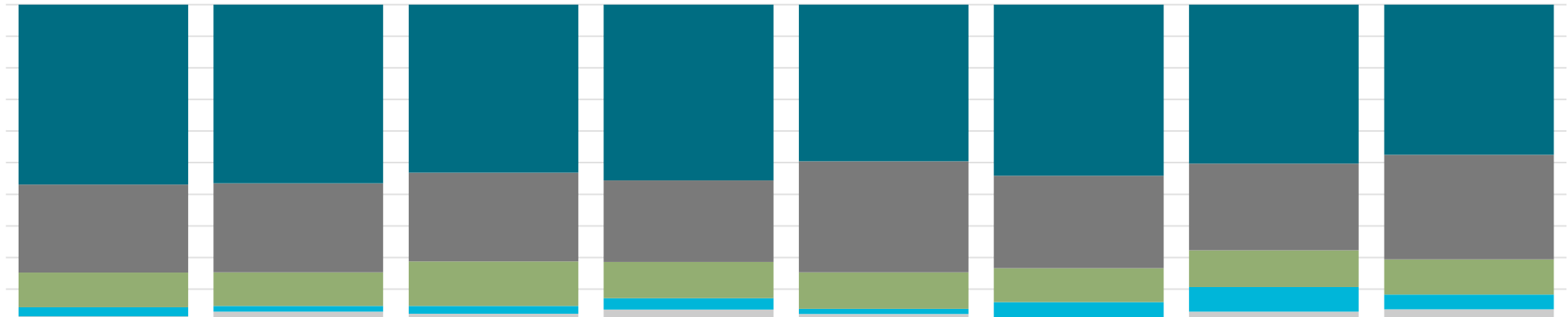
n=134

N=77

n=440

n=1,801

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

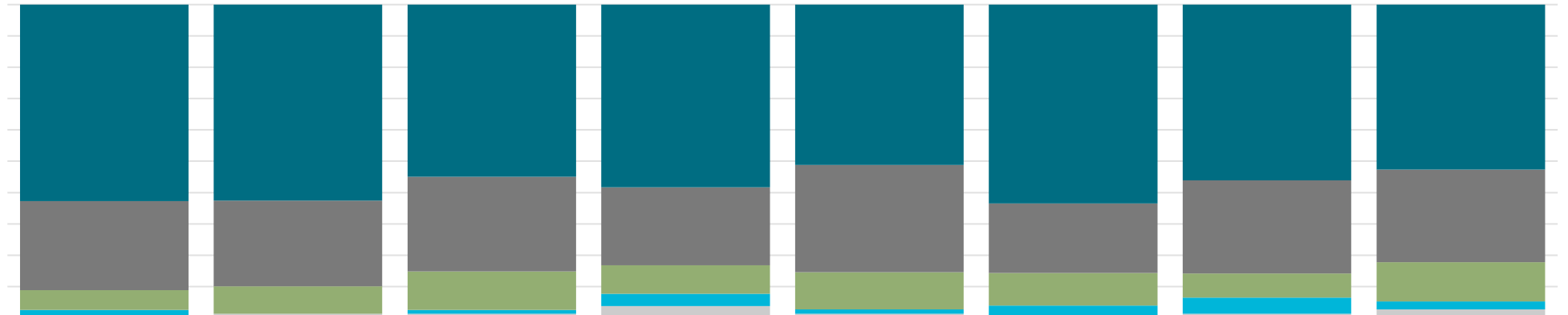


	Value for money	Comfort and accessibility	Natural attractions/activities	Family friendly locations and activities	Opportunity to experience local restaurants/businesses	Cultural attractions	Entertainment and nightlife	Consideration of sustainable principles
■ Very Important 5	57%	57%	53%	56%	50%	54%	50%	47%
■ 4	28%	28%	28%	26%	35%	29%	27%	33%
■ 3	11%	11%	14%	11%	12%	11%	12%	11%
■ 2	3%	2%	2%	4%	2%	5%	8%	5%
■ Not very Important 1	1%	3%	2%	4%	2%	1%	3%	4%

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

Sample Size: n=134

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

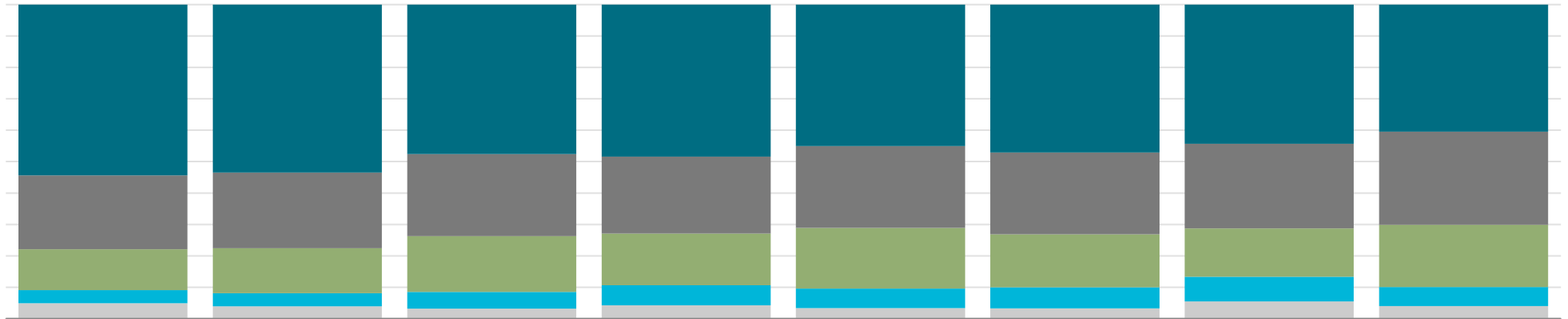


	Value for money	Comfort and accessibility	Natural attractions/activities	Family friendly locations and activities	Opportunity to experience local restaurants/businesses	Cultural attractions	Entertainment and nightlife	Consideration of sustainable principles
■ Very Important 5	63%	63%	55%	58%	51%	63%	56%	53%
■ 4	28%	27%	30%	25%	34%	22%	30%	30%
■ 3	6%	9%	12%	9%	12%	10%	8%	12%
■ 2	3%	0%	1%	4%	1%	4%	5%	3%
■ Not very Important 1	0%	1%	1%	4%	1%	0%	1%	3%

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

Sample Size: n=77

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	54%	54%	48%	48%	45%	47%	44%	40%
■ 4	24%	24%	26%	24%	26%	26%	27%	30%
■ 3	13%	14%	18%	17%	19%	17%	15%	20%
■ 2	4%	4%	5%	6%	6%	7%	8%	6%
■ Not very Important 1	5%	4%	3%	4%	3%	3%	6%	4%

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

Sample Size: n=440

U.S. Nat Rep: Importance of Travel Factors



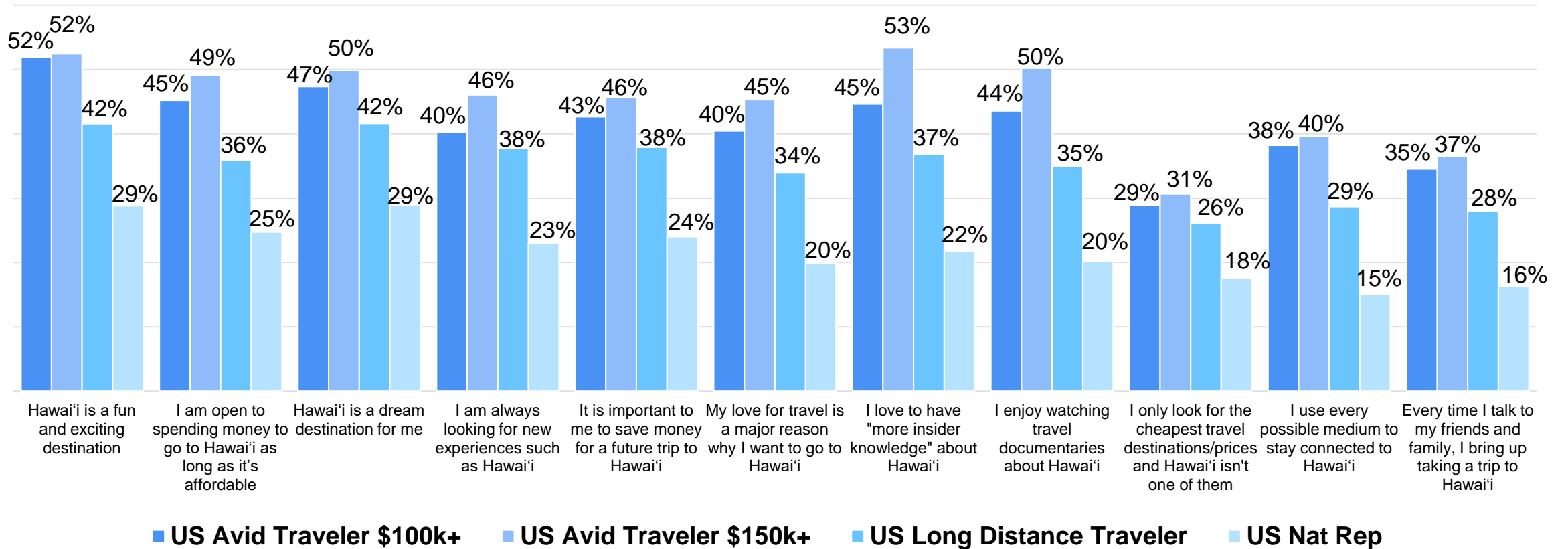
	Value for money	Comfort and accessibility	Natural attractions/activities	Family friendly locations and activities	Opportunity to experience local restaurants/businesses	Cultural attractions	Entertainment and nightlife	Consideration of sustainable principles
■ Very Important 5	55%	52%	44%	42%	41%	38%	31%	29%
■ 4	25%	27%	30%	24%	28%	28%	24%	23%
■ 3	13%	15%	17%	20%	21%	22%	23%	28%
■ 2	4%	3%	5%	7%	6%	7%	10%	9%
■ Not very Important 1	4%	3%	4%	8%	5%	5%	11%	11%

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

Sample Size: n=1,801

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

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



Sample Size:

n=134

n=77

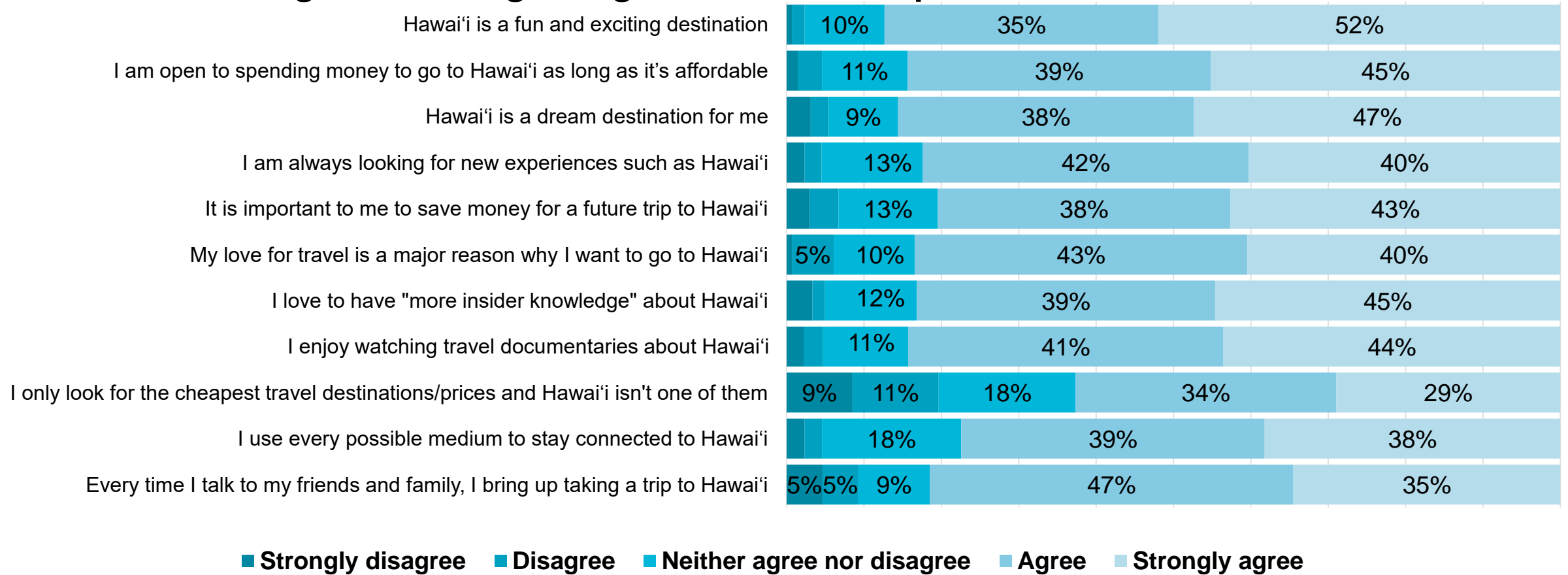
n=440

n=1,801

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

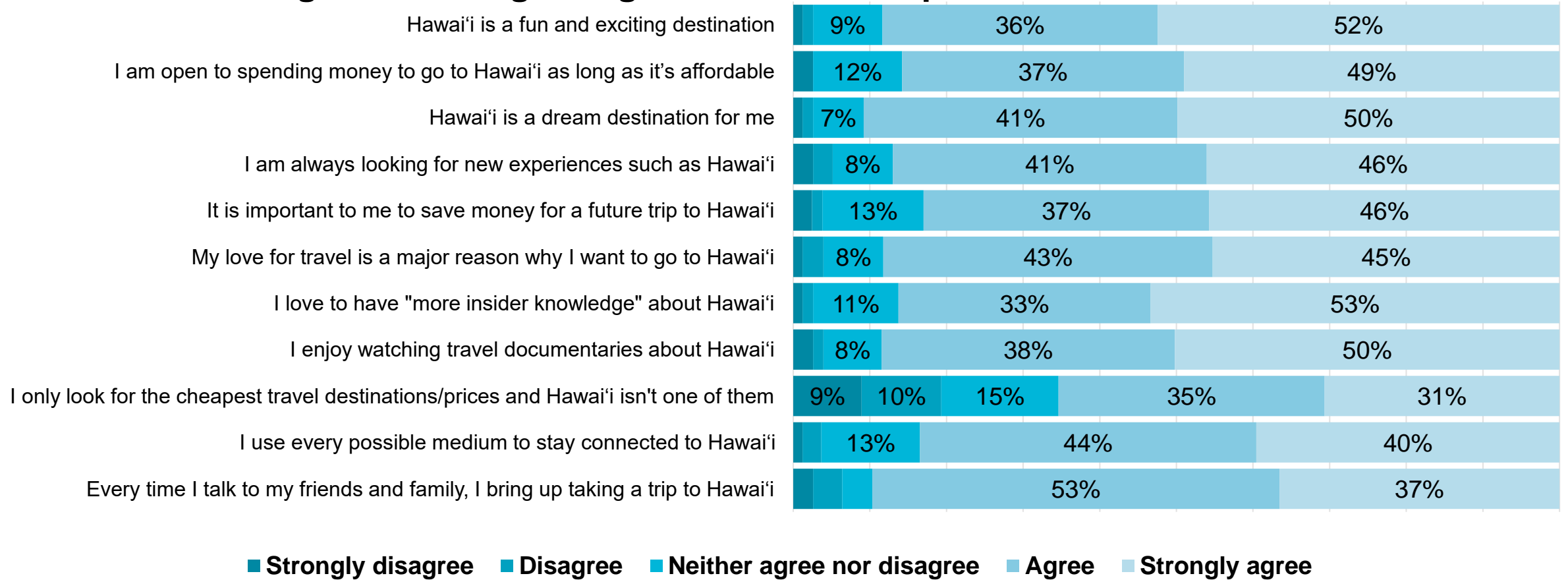
Agreement Regarding Hawai'i as an Aspirational Destination



Sample Size: n=134

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

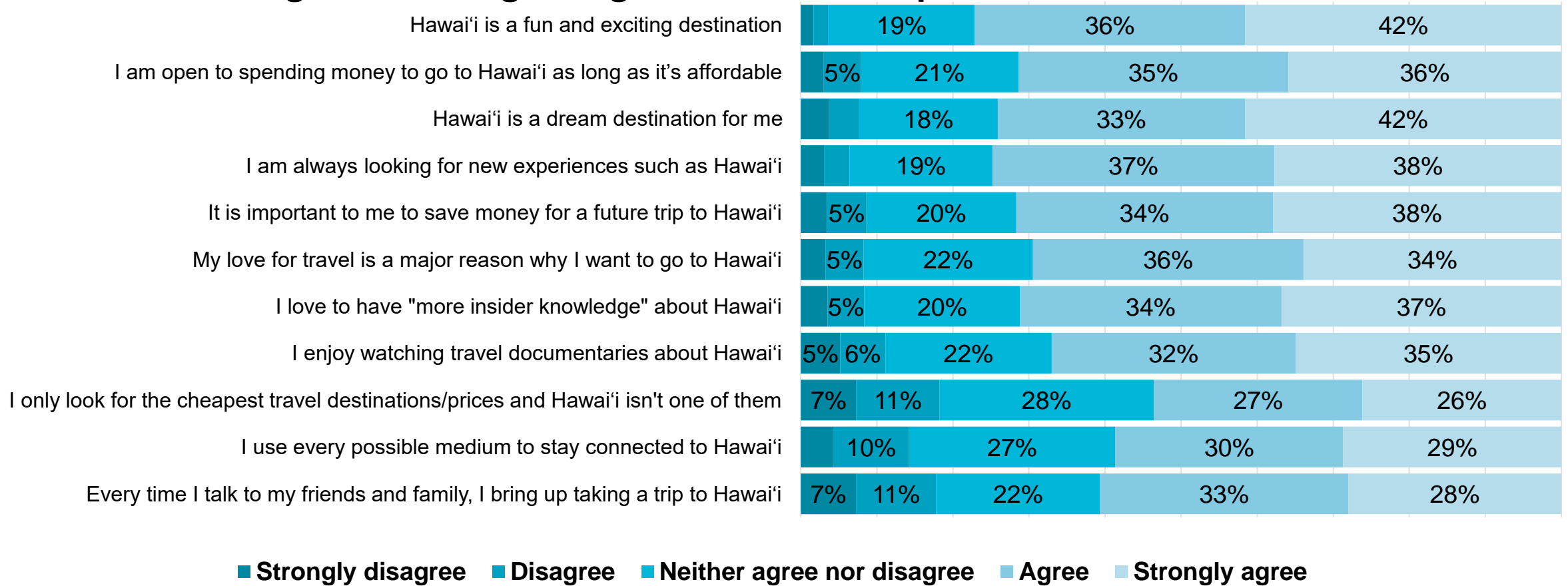
Agreement Regarding Hawai'i as an Aspirational Destination



Sample Size: n=77

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

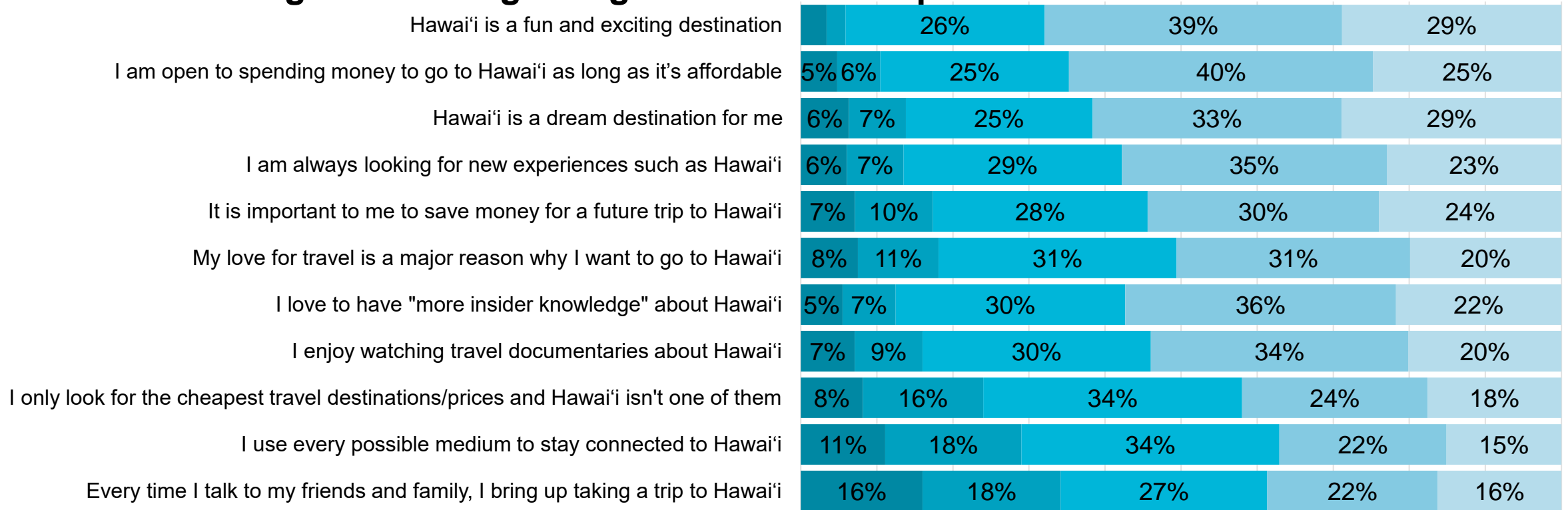
Agreement Regarding Hawai'i as an Aspirational Destination



Sample Size: n=440

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

Agreement Regarding Hawai'i as an Aspirational Destination

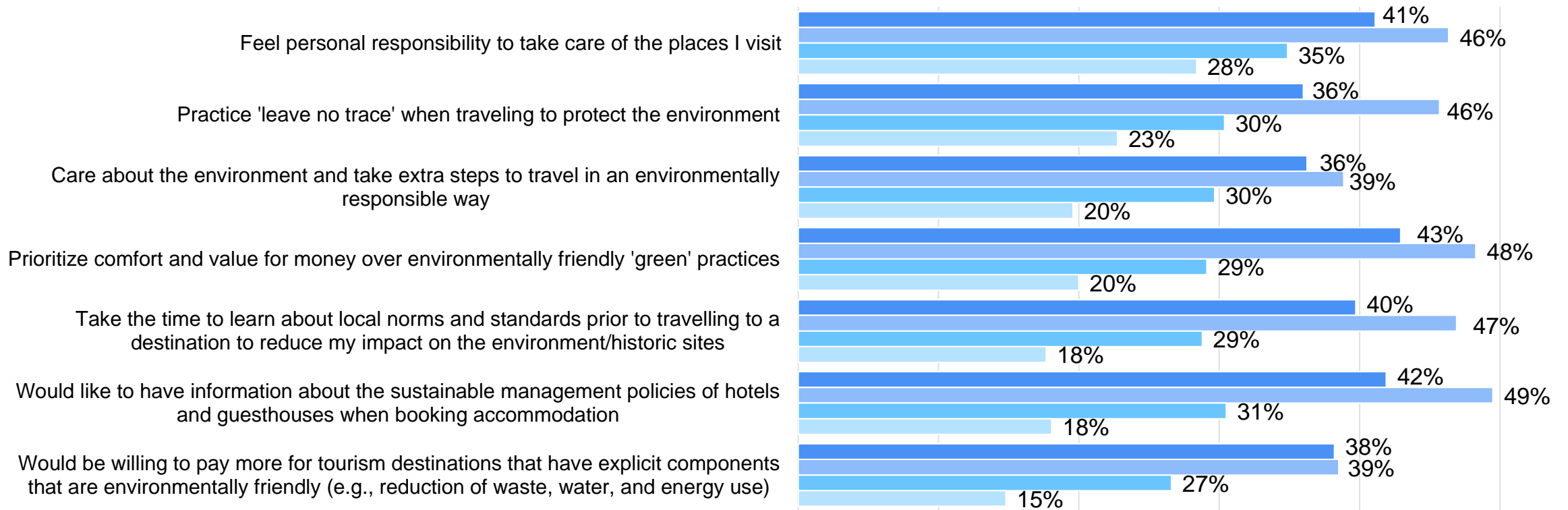


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=1,801

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=134

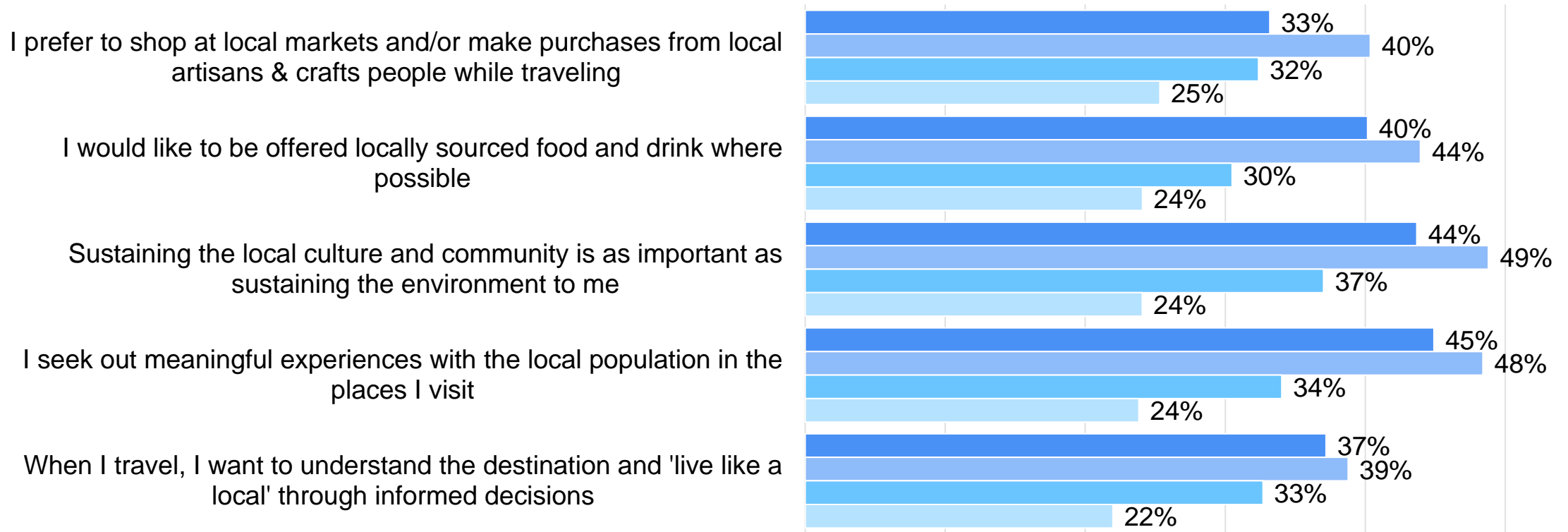
n=77

n=440

n=1,801

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=134

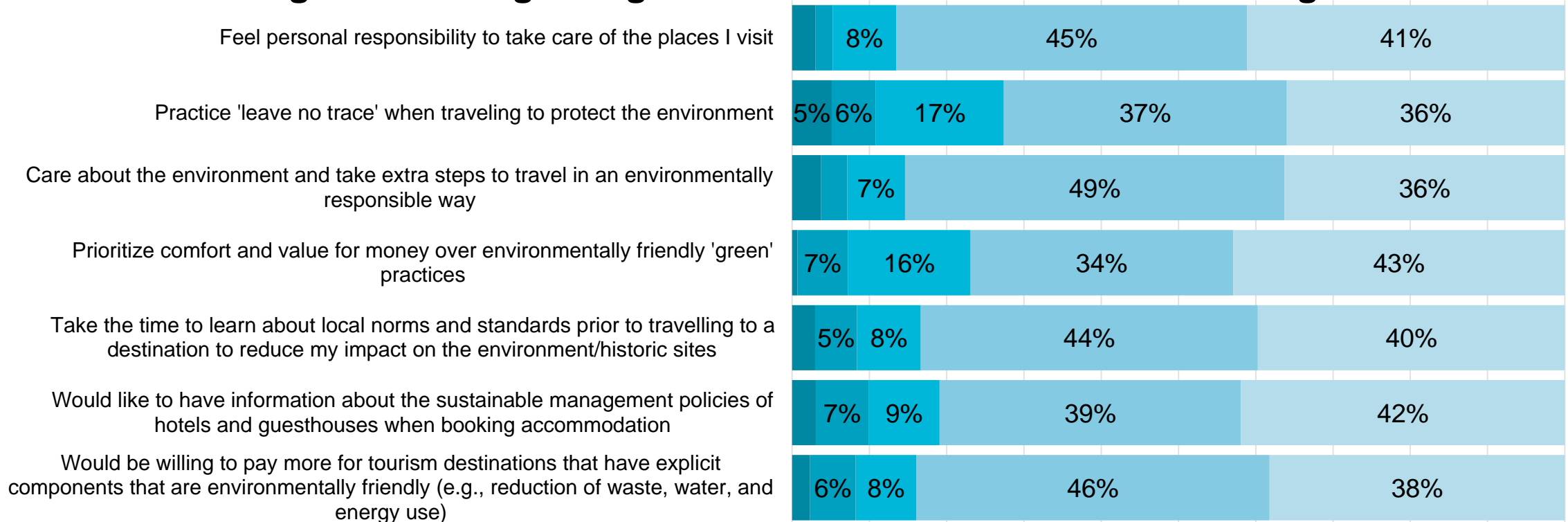
n=77

n=440

n=1,801

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

Agreement Regarding Sustainable Practices While Traveling

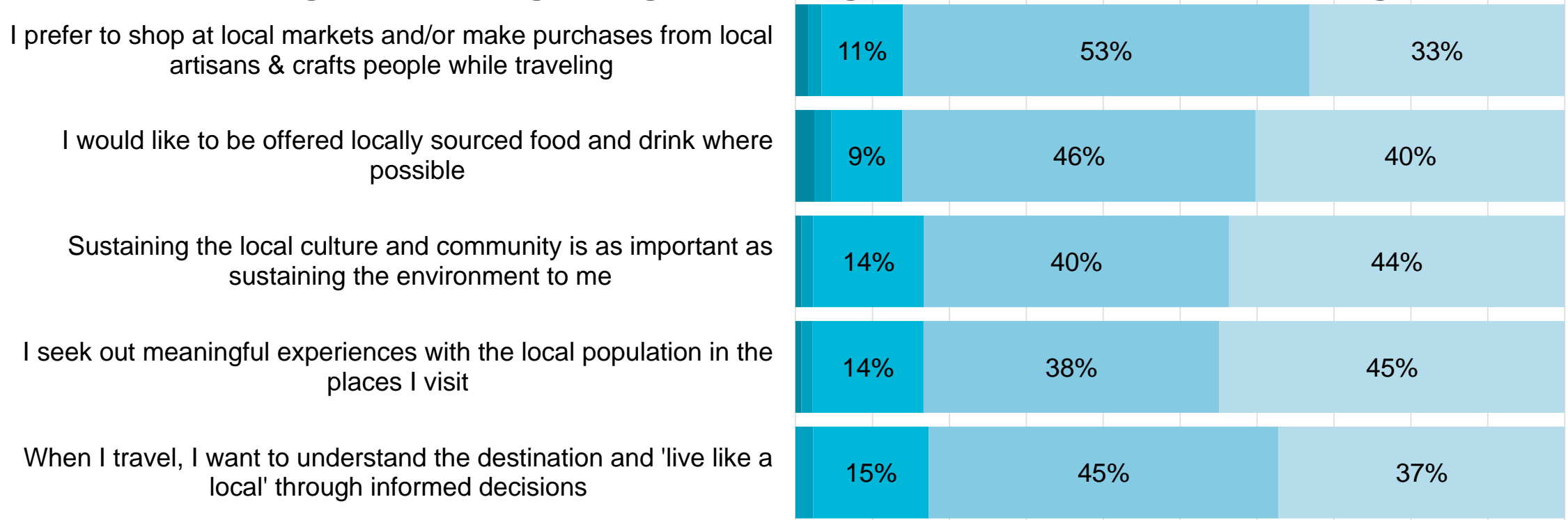


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=134

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

Agreement Regarding Sustaining Local Culture While Traveling

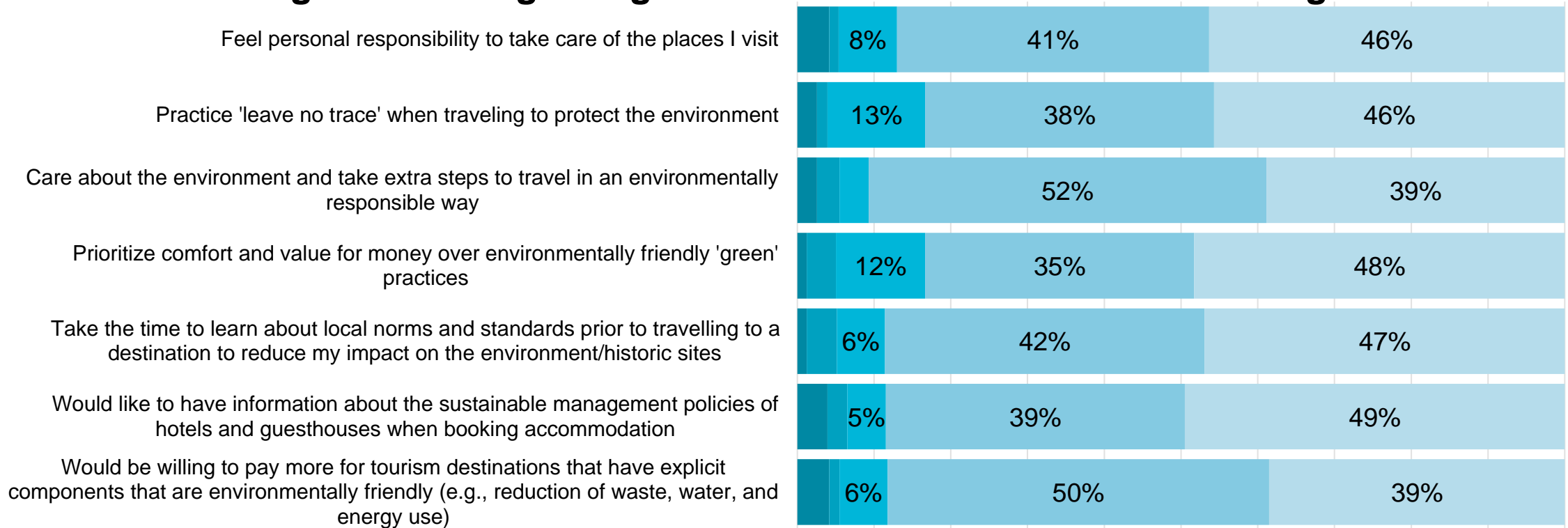


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=134

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

Agreement Regarding Sustainable Practices While Traveling

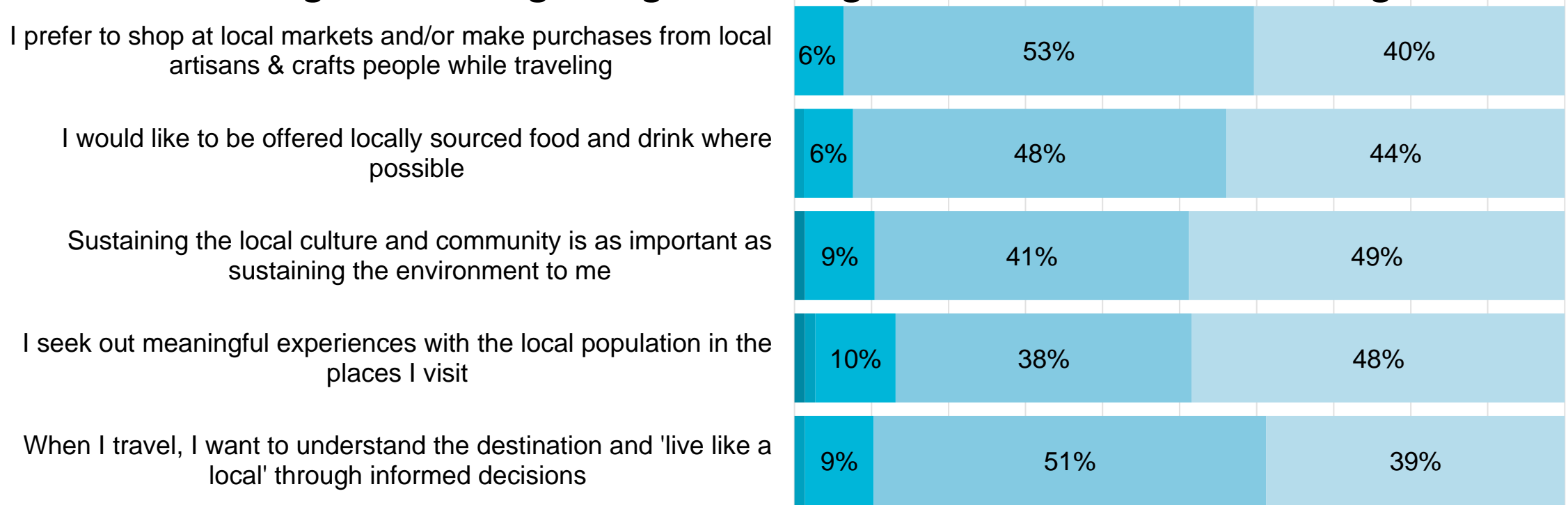


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=77

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

Agreement Regarding Sustaining Local Culture While Traveling

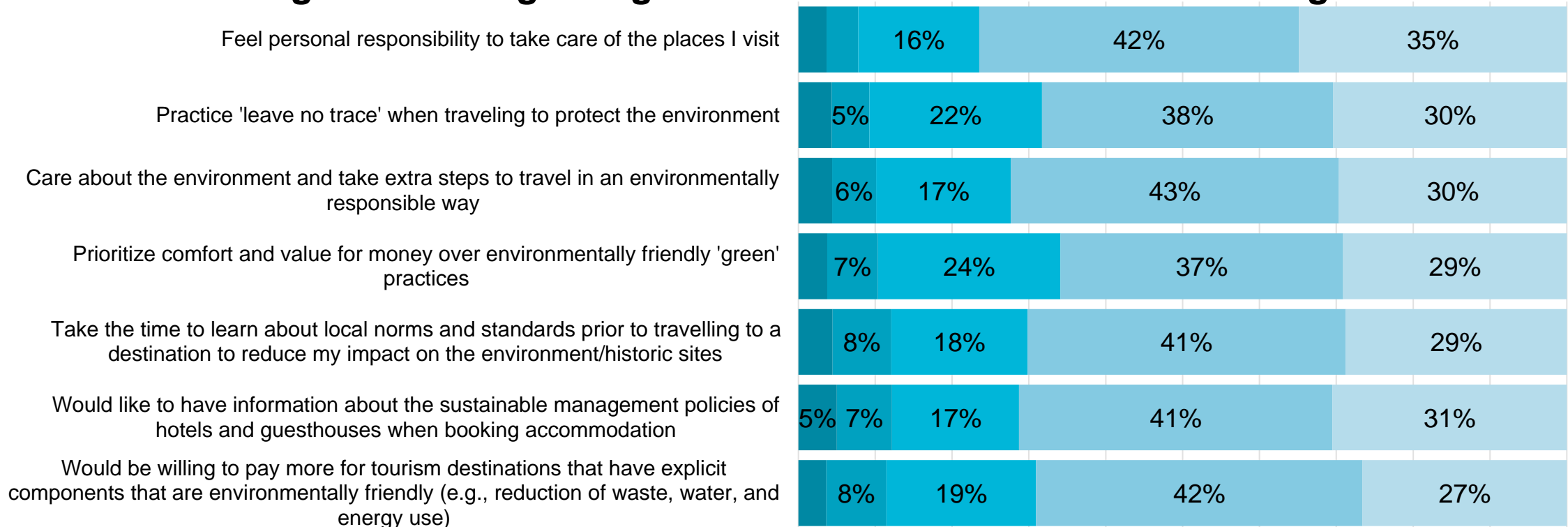


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=77

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=440

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

Agreement Regarding Sustaining Local Culture While Traveling

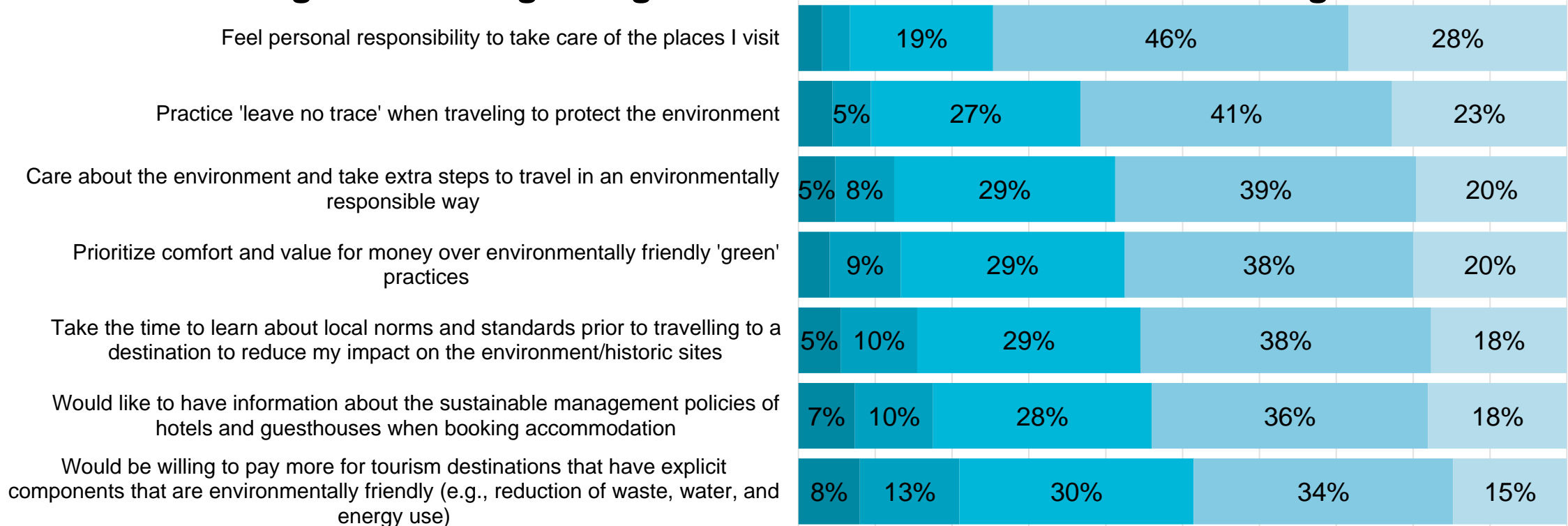


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=440

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=1,801

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

Agreement Regarding Sustaining Local Culture While Traveling

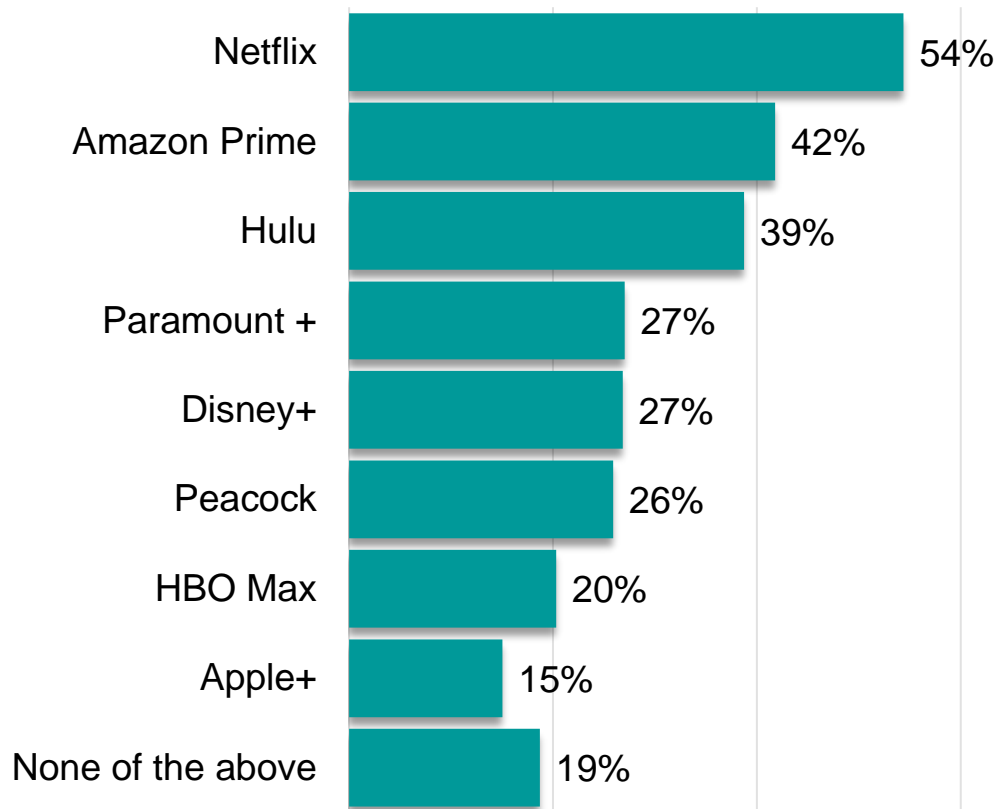


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

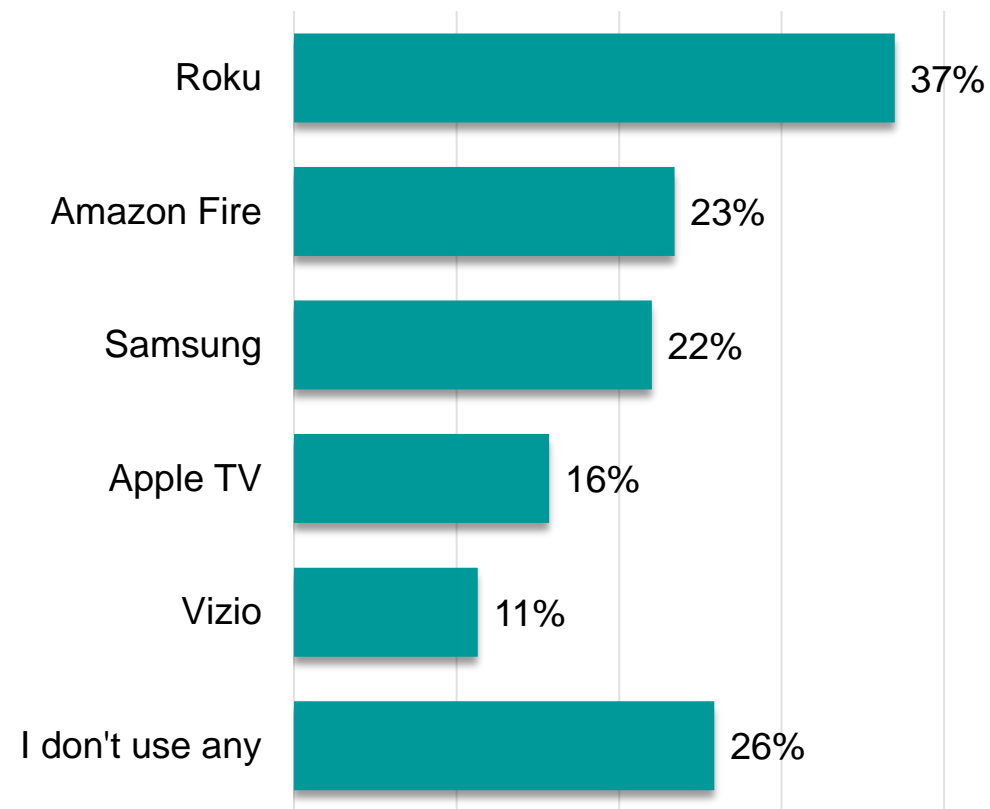
Sample Size: n=1,801

U.S. Media Consumption

Streaming Platforms Used Weekly



Connected Device Used

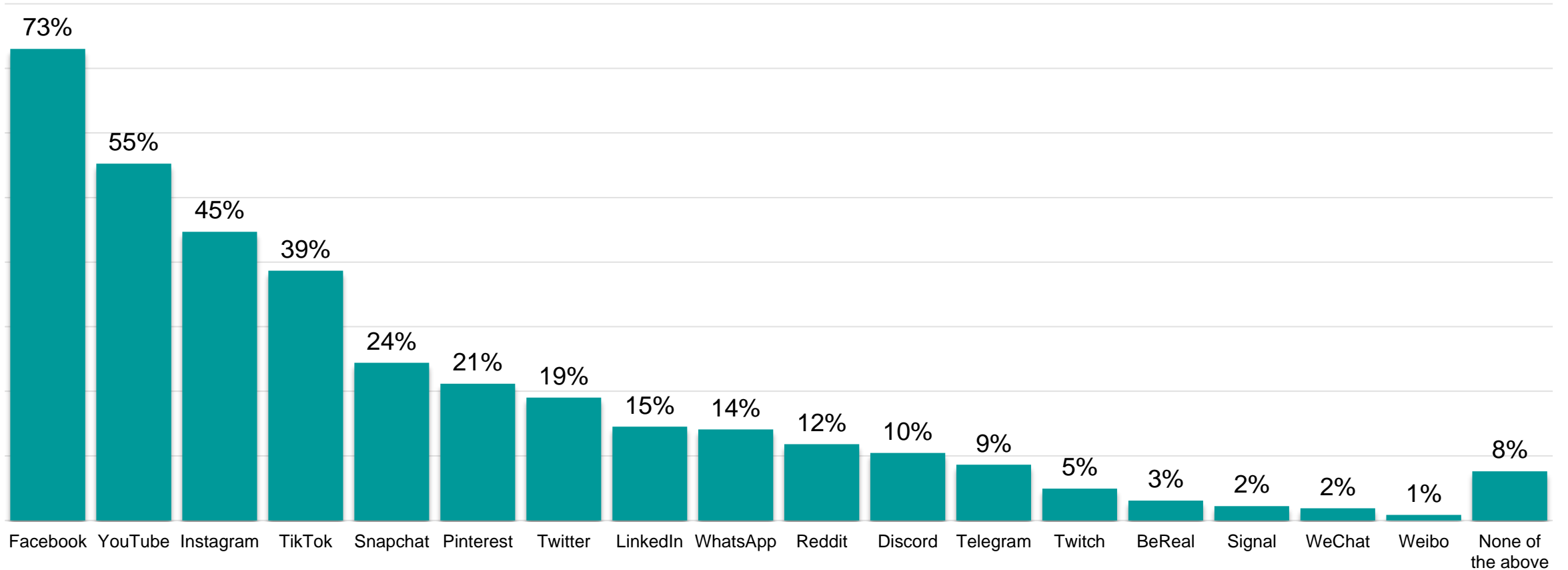


Sample Size: n=1,801

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=1,801

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	43%
Online	31%
Social Media	37%
TV commercials	29%
YouTube	33%
TV Program/Documentary	21%
Email	18%
Radio	10%
Newspaper	10%
Out of home advertising (e.g. Poster Billboards, bus shelter advertisements, etc.)	8%
I don't recall	14%

Actions Taken After Seeing an Ad for a Destination

I search for information about the destination online	42%
I talk to friends/family about the destination	34%
I go to the destination's website	30%
I look up the destination on social media	23%
I book travel to the destination almost immediately	13%
I don't do anything	16%
None of the above	9%

Sample Size: n=1,801