



Vision Insights U.S. Traveler Profiles April 2025

May 28, 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

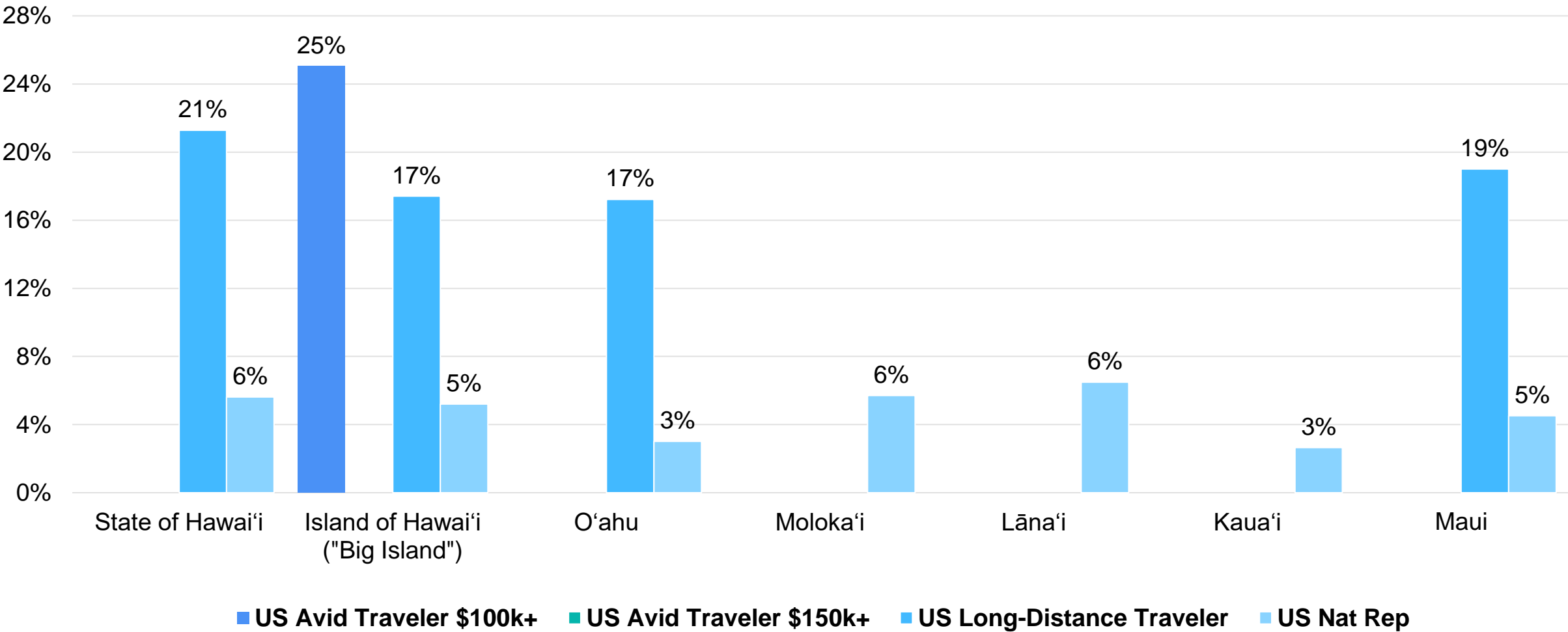
Avid Traveler \$150k+

- 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

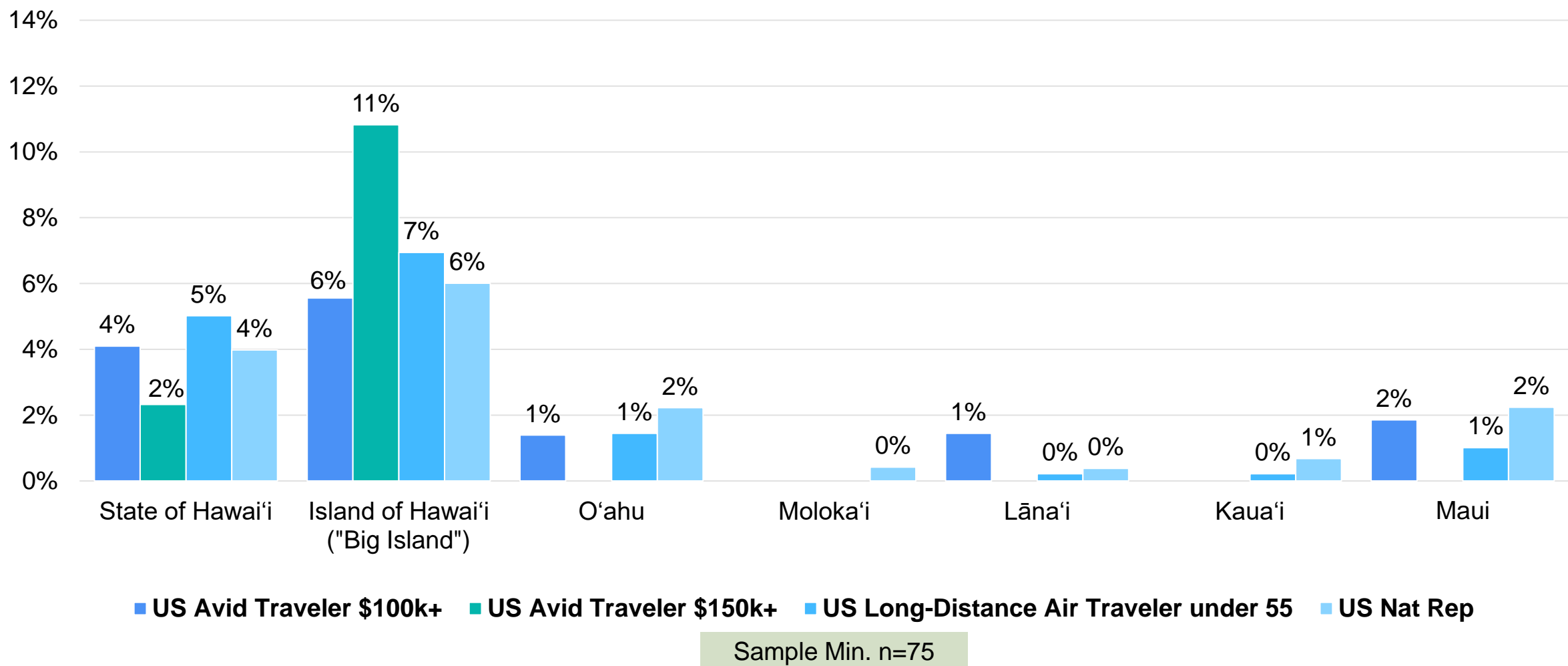
U.S. - Leisure Trip In Past 12 Months



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	17.5%	New York	9.5%	New York	13.6%	New York	9.5%
California	15.5%	Texas	9.1%	Texas	11.0%	Texas	9.1%
Florida	11.6%	Florida	8.7%	California	9.0%	Florida	8.7%
Texas	10.3%	California	6.4%	Florida	8.7%	California	6.4%
Georgia	5.4%	Pennsylvania	5.6%	Georgia	5.6%	Pennsylvania	5.6%
Virginia	3.8%	Illinois	3.4%	Pennsylvania	5.4%	North Carolina	5.3%
Washington	3.8%	Virginia	2.3%	Virginia	3.4%	Georgia	4.9%
Pennsylvania	3.5%	New Jersey	2.2%	Washington	3.0%	Ohio	4.7%
Illinois	1.7%	Washington	1.2%	Illinois	1.9%	Illinois	3.4%
Minnesota	0.0%	Colorado	1.0%	Minnesota	0.4%	Virginia	2.3%
Sample Size: n=194		n=73		n=407		n=1,811	

Sample Size:

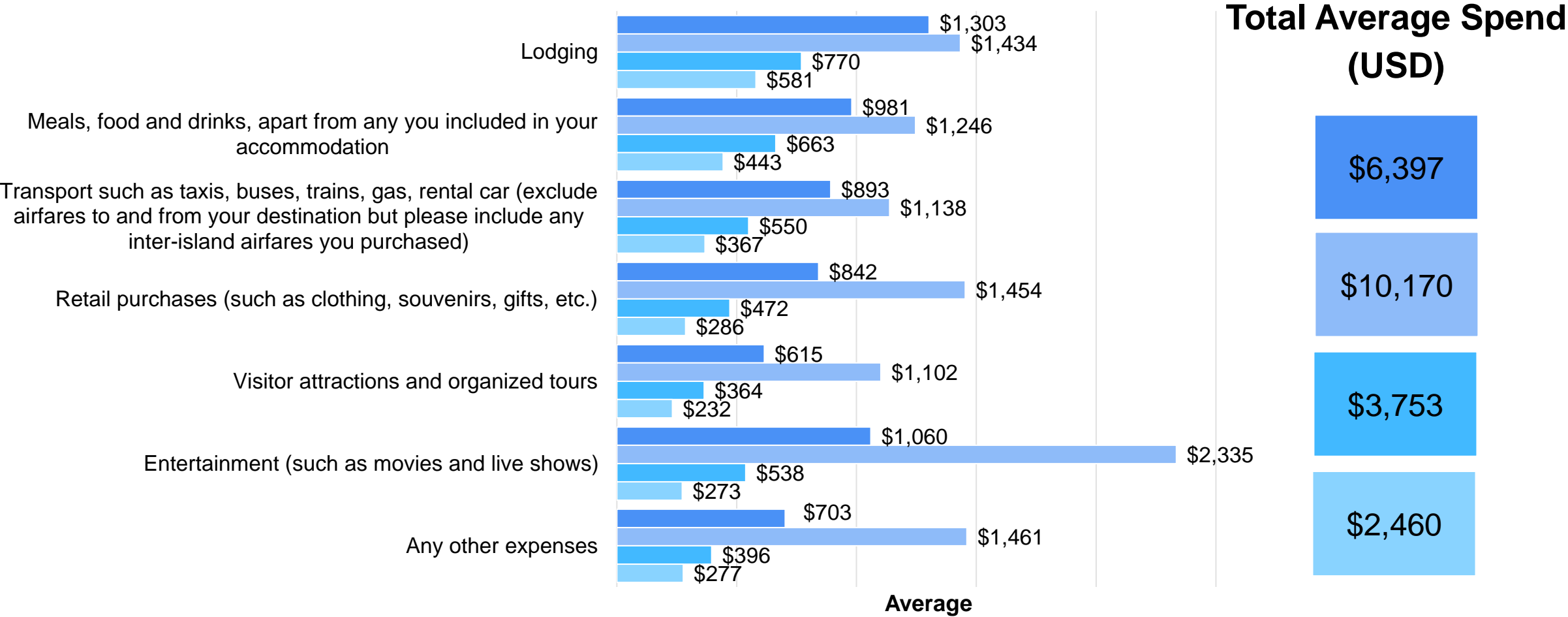
n=194

n=73

n=407

n=1,811

U.S. - Total Annual Holiday Spend

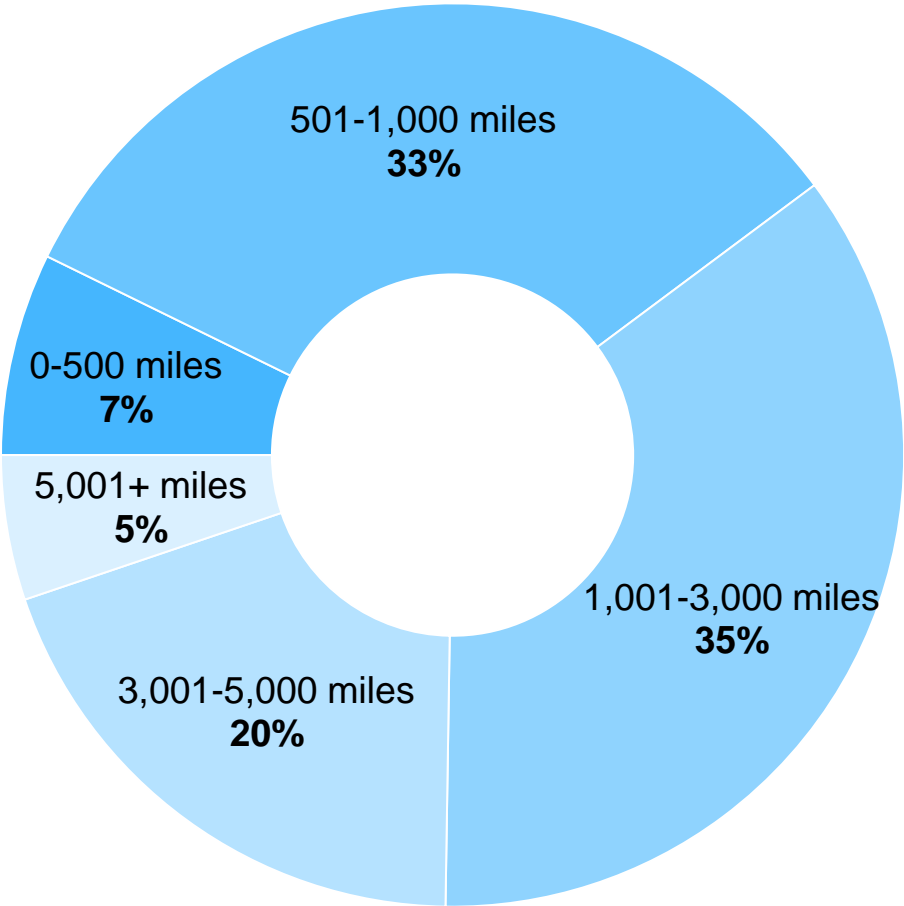


■ US Avid Traveler \$100k+ ■ US Avid Traveler \$150k+ ■ US Long-Distance Air Traveler under 55 ■ US Nat Rep

Sample Size: n=194 n=73 n=407 n=1,811

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

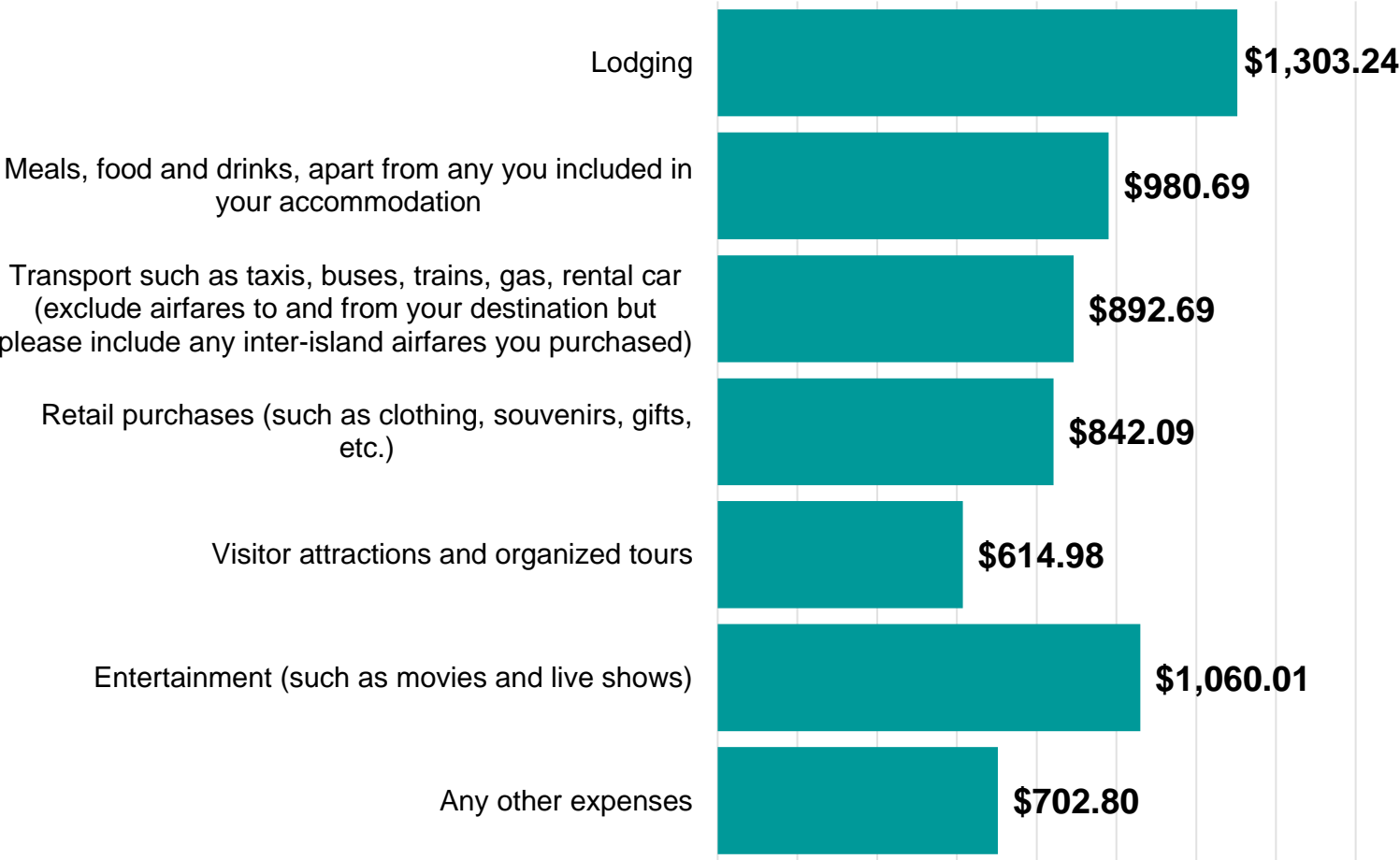
Distance Travelled on Annual Vacation



Sample Size: n=194

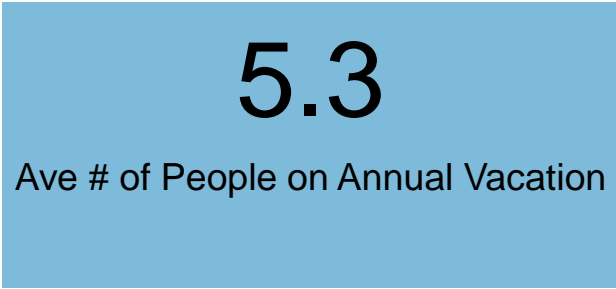
U.S. Avid Travelers \$100k+: Annual Vacation

Average Spend



Sample Size: n=194

Spend Per Person Per Day

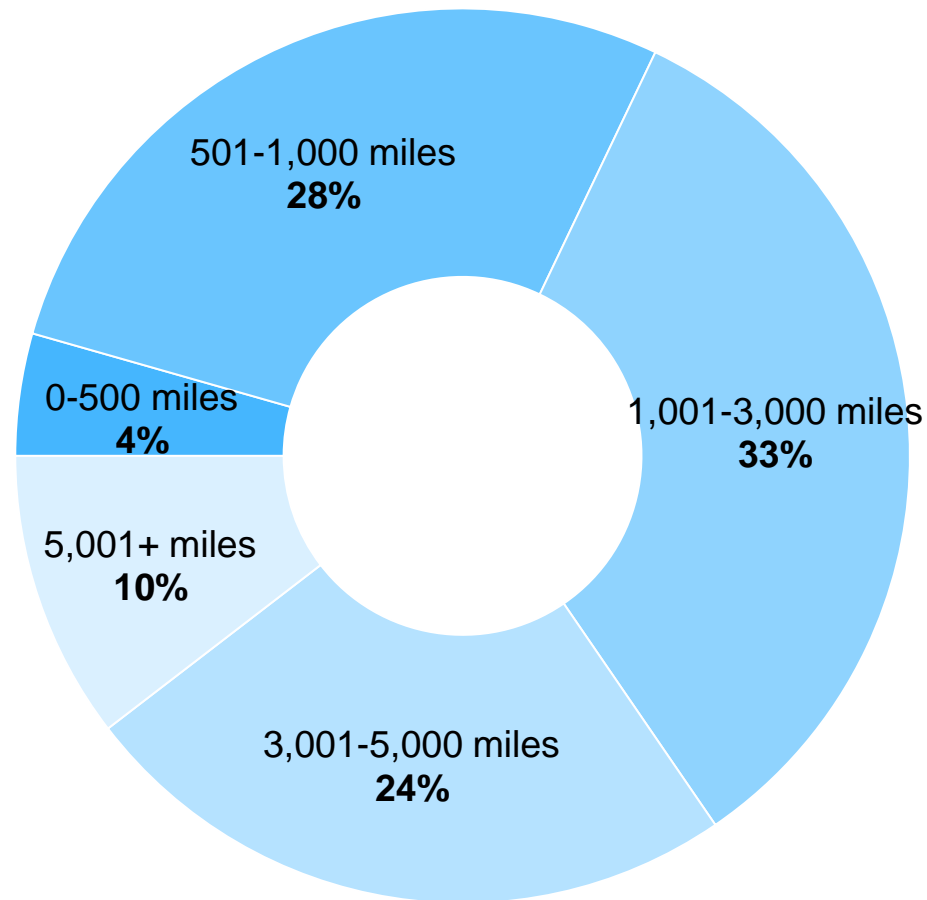


\$140.55

Ave. Per Person Per Day Spend

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

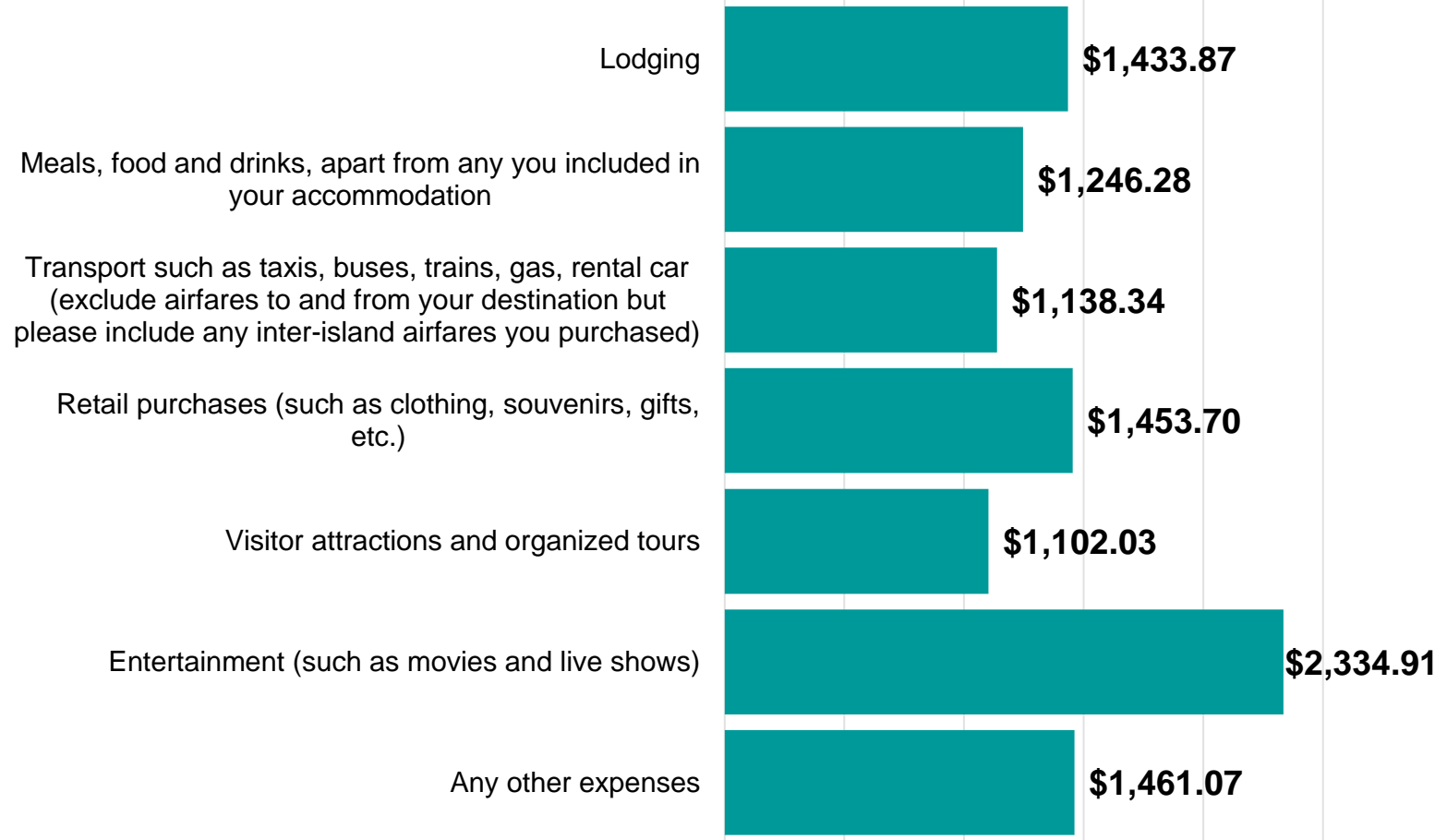
Distance Travelled on Annual Vacation



Sample Size: n=73

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

Average Spend



Sample Size: n=73

Spend Per Person Per Day

8.2
Ave # Nights on Annual Vacation

6.4
Ave # of People on Annual Vacation

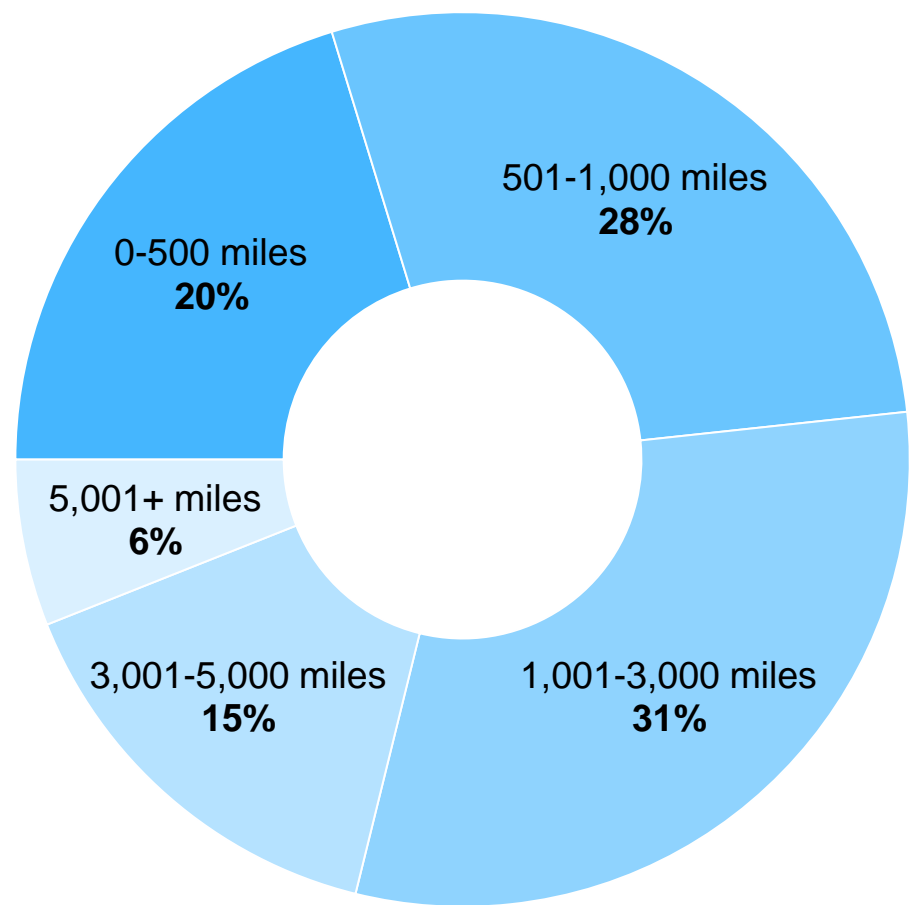


\$196.56

Ave. Per Person Per Day Spend

U.S. Long-Distance Travelers: Annual Vacation

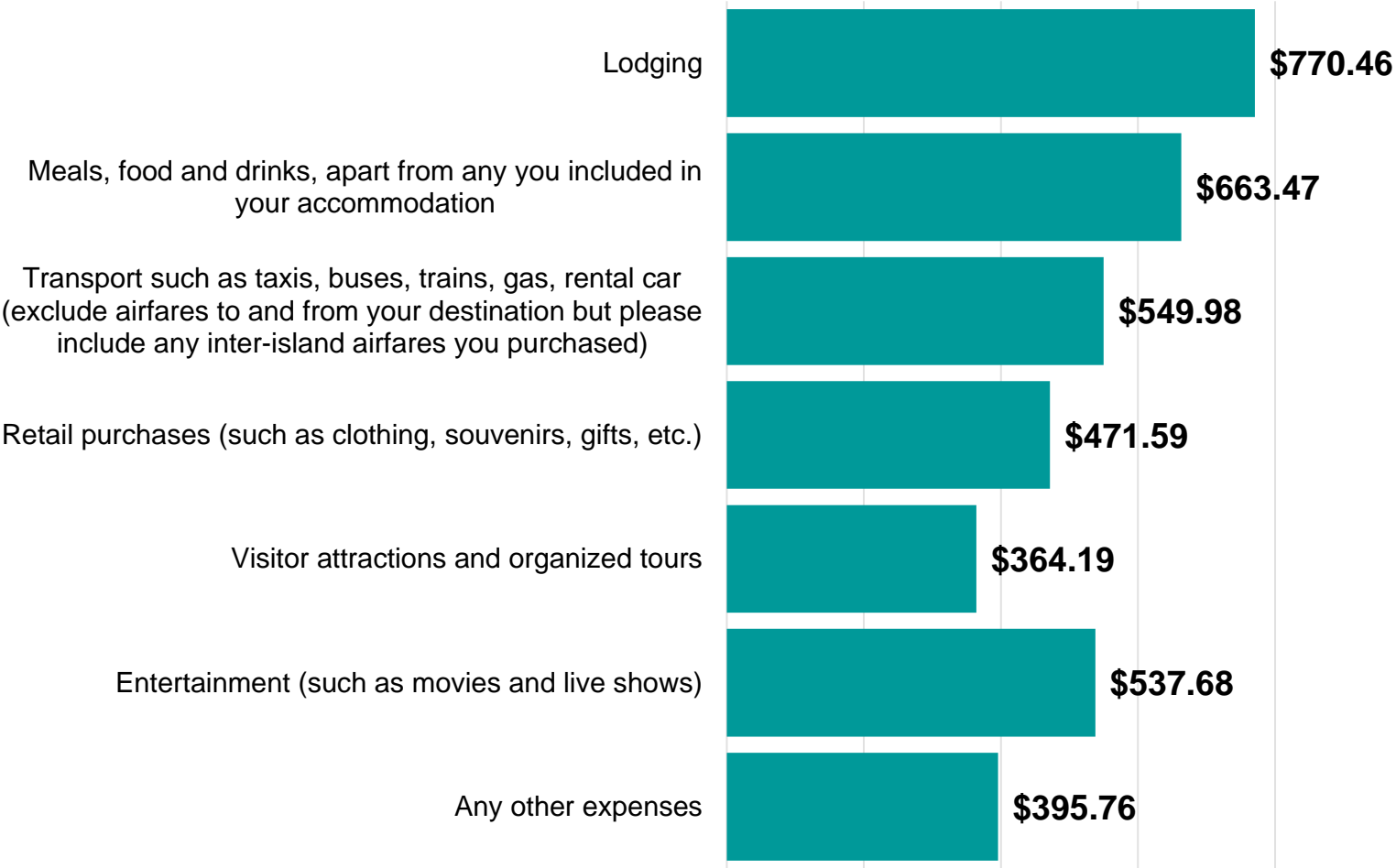
Distance Travelled on Annual Vacation



Sample Size: n=407

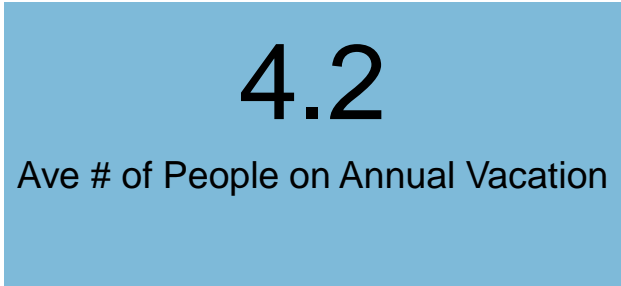
U.S. Long-Distance Travelers: Annual Vacation

Average Spend



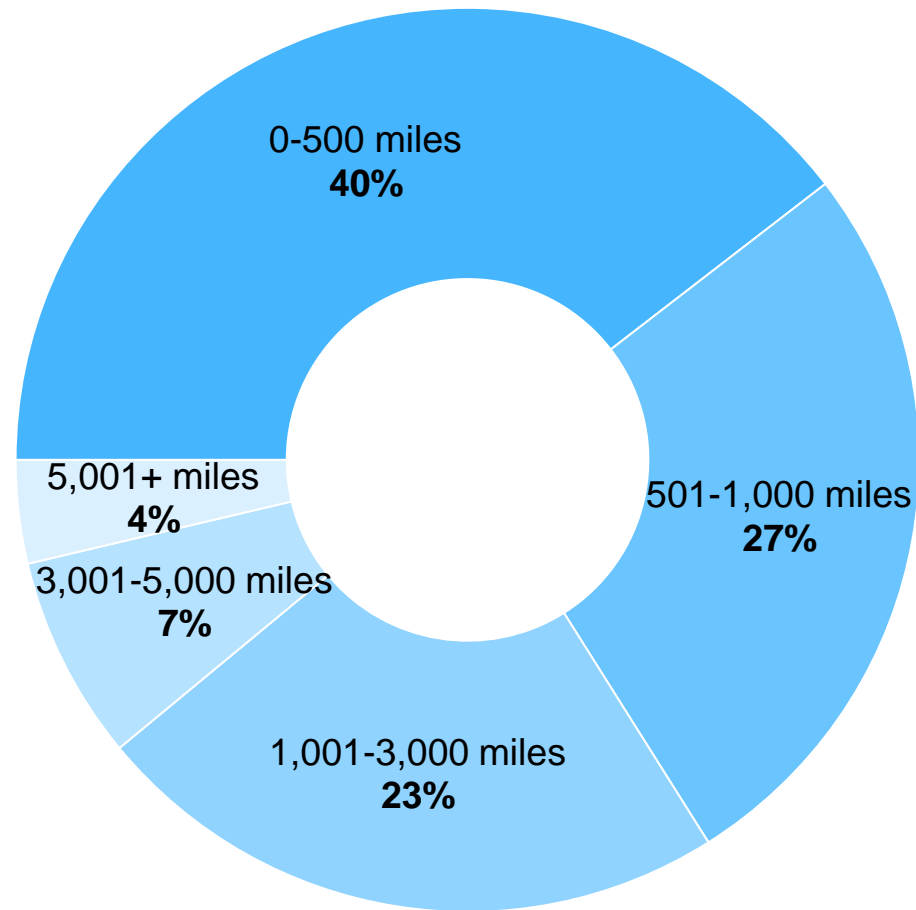
Sample Size: n=407

Spend Per Person Per Day



U.S. Nat Rep: Annual Vacation

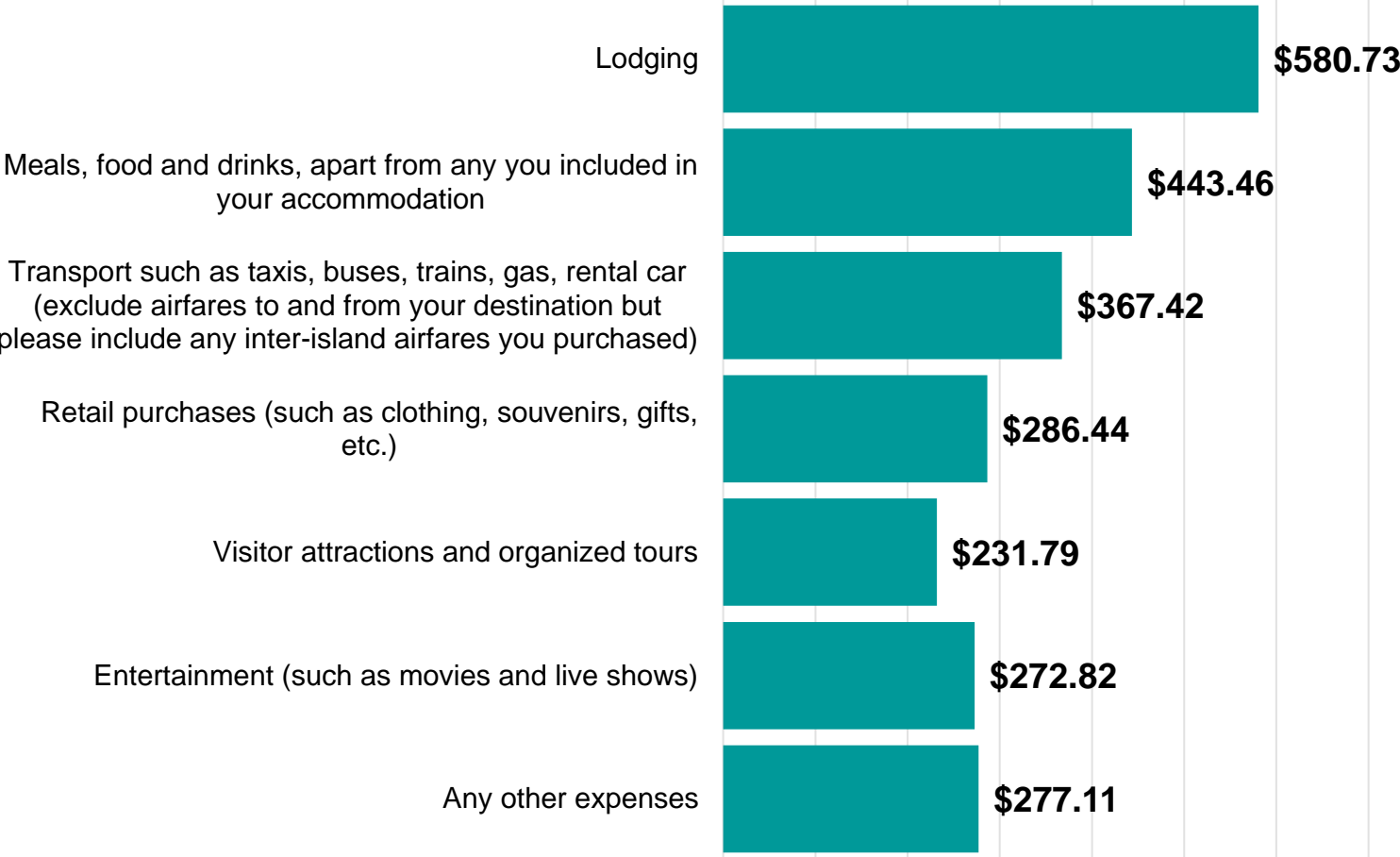
Distance Travelled on Annual Vacation



Sample Size: n=1,811

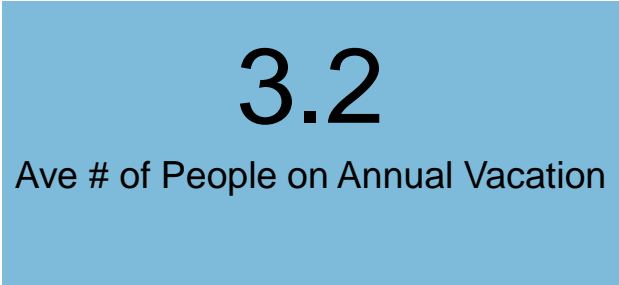
U.S. Nat Rep: Annual Vacation

Average Spend



Sample Size: n=1,811

Spend Per Person Per Day



\$139.90
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	58%	60%	46%	47%
Value for money	50%	52%	47%	51%
Entertainment and nightlife	41%	46%	38%	28%
Consideration of sustainable principles	43%	42%	39%	28%
Natural attractions/activities	52%	48%	47%	42%
Cultural attractions	48%	47%	42%	35%
Opportunity to experience local restaurants/businesses	46%	44%	41%	36%
Family-friendly location and activities	53%	54%	44%	38%
Safe and Secure Destination	59%	56%	50%	55%

Sample Size:

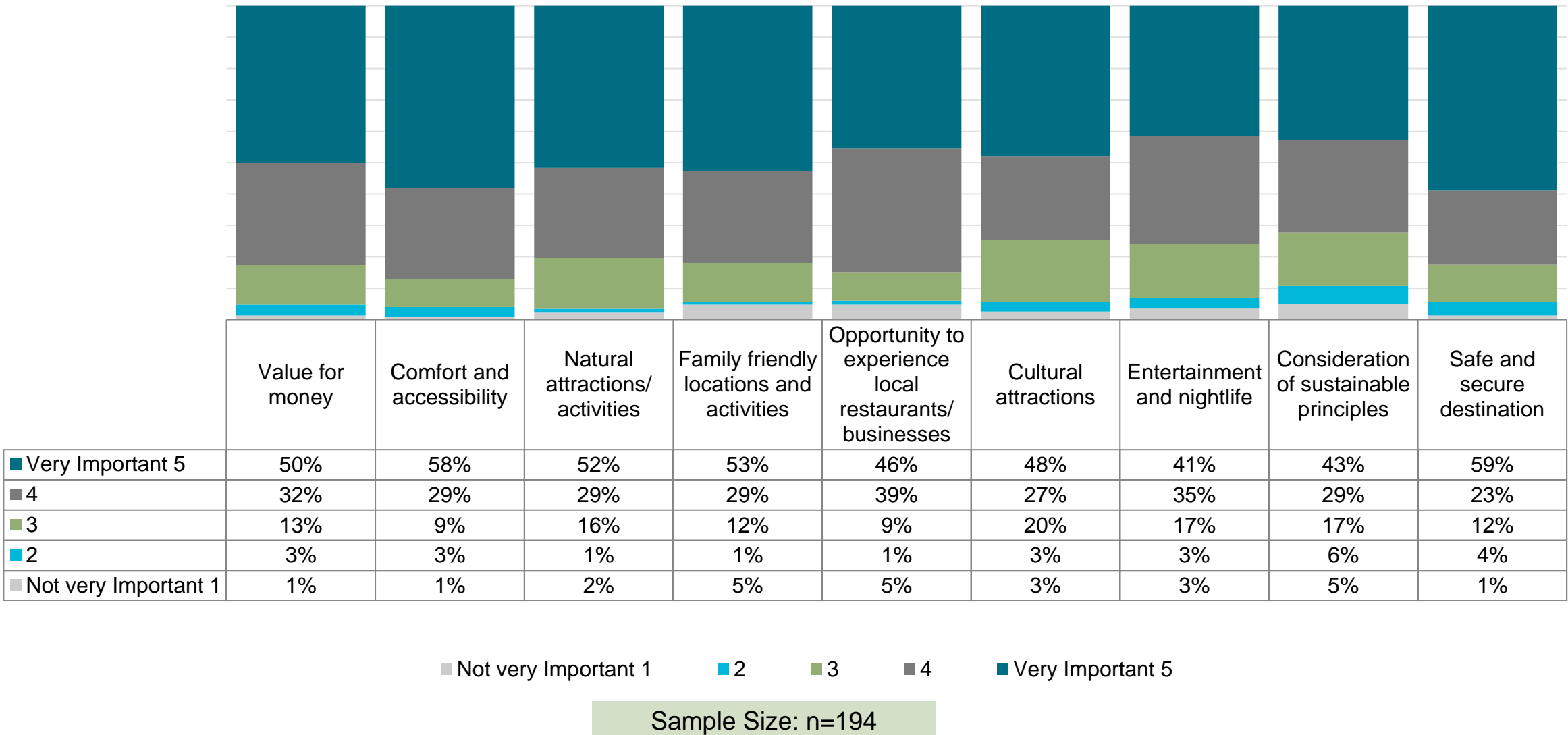
n=194

n=73

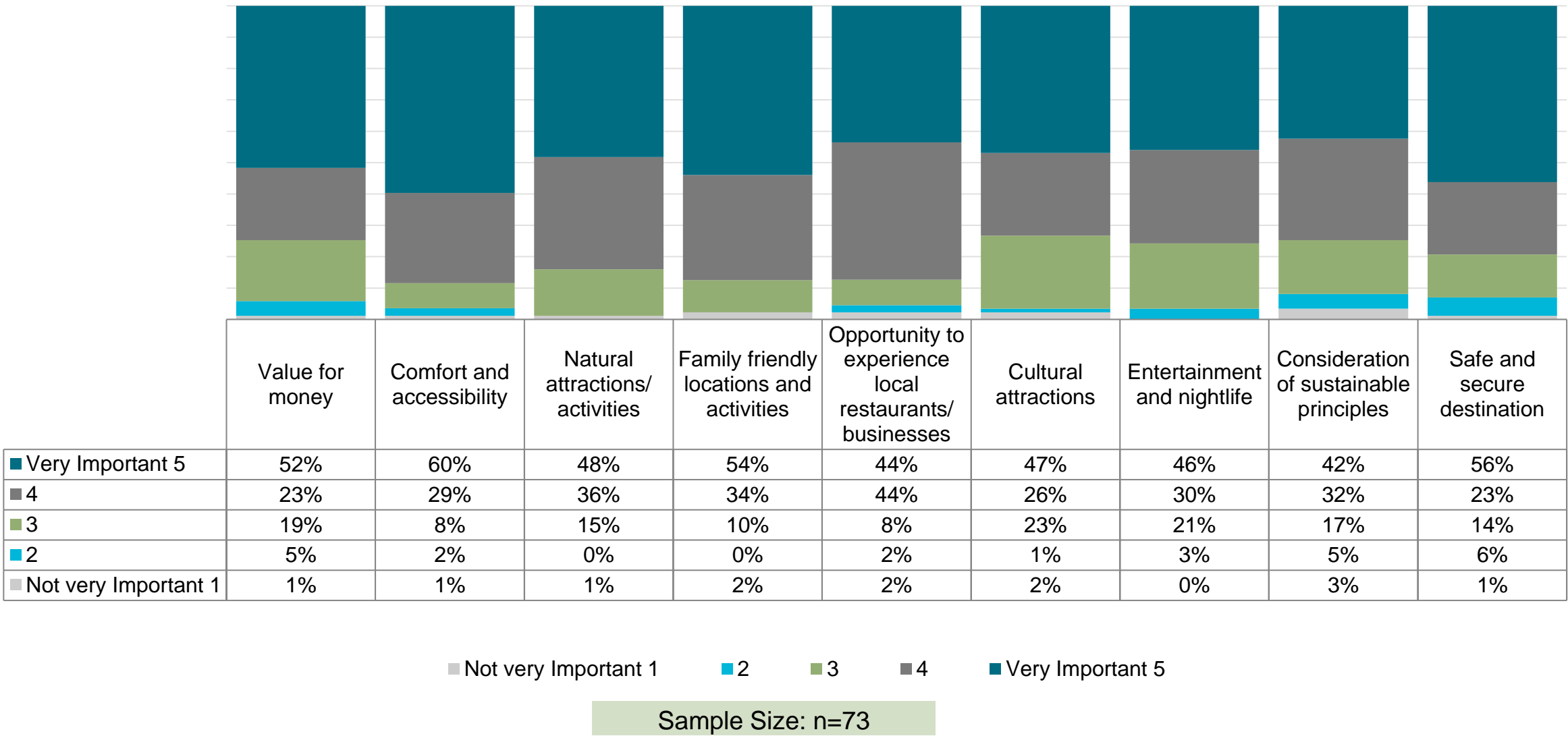
n=407

n=1,811

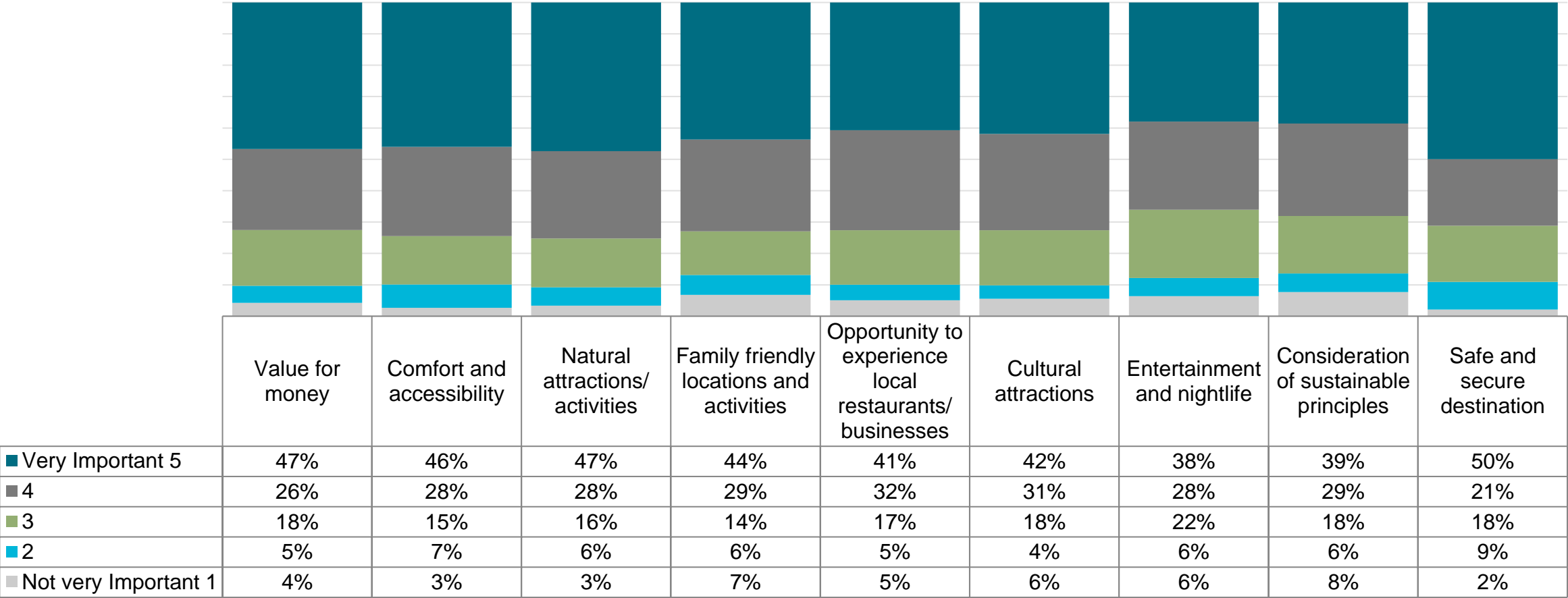
U.S. Avid Travelers \$100k+: Importance of Travel Factors



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



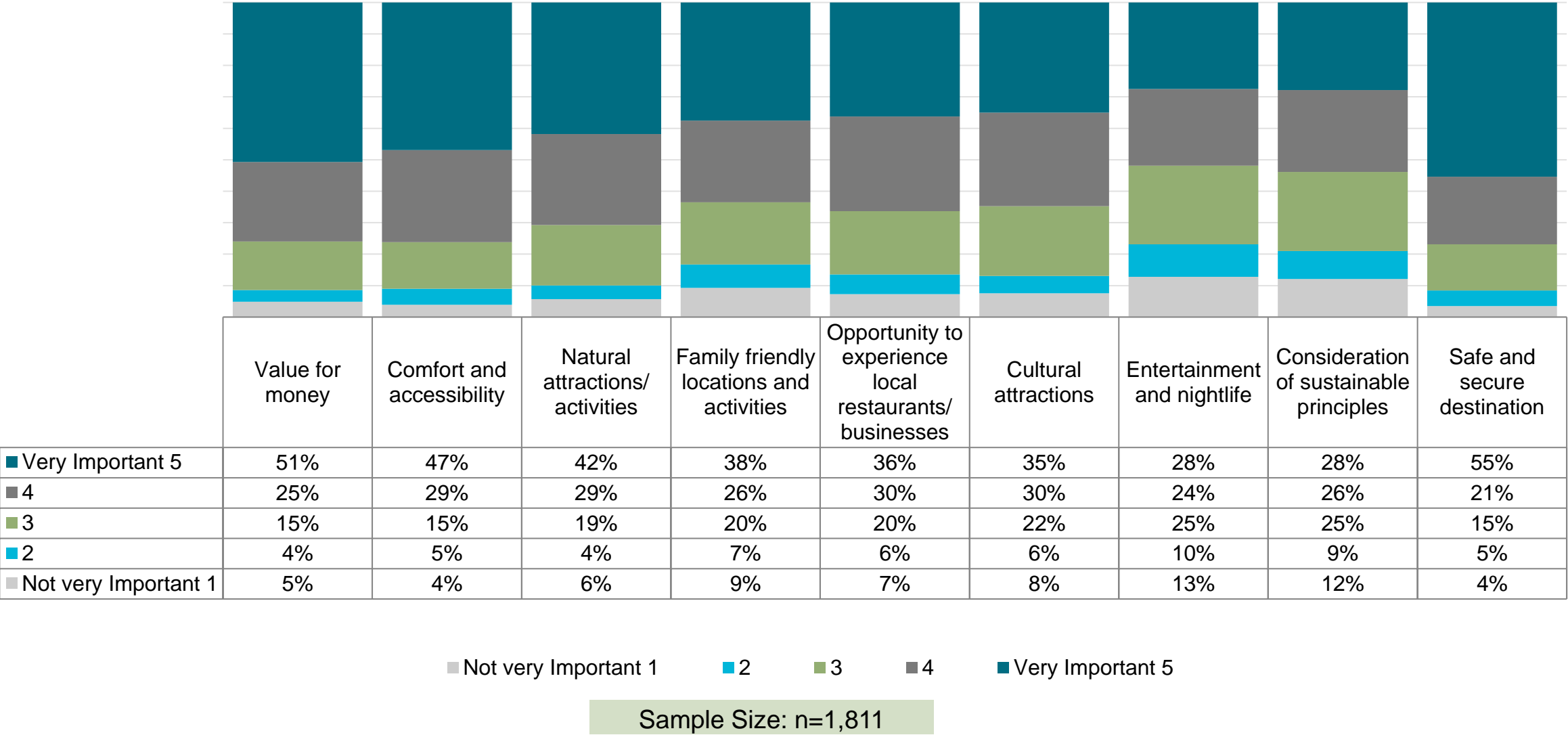
U.S. Long Distance Travelers: Importance of Travel Factors



Not very Important 1 2 3 4 Very Important 5

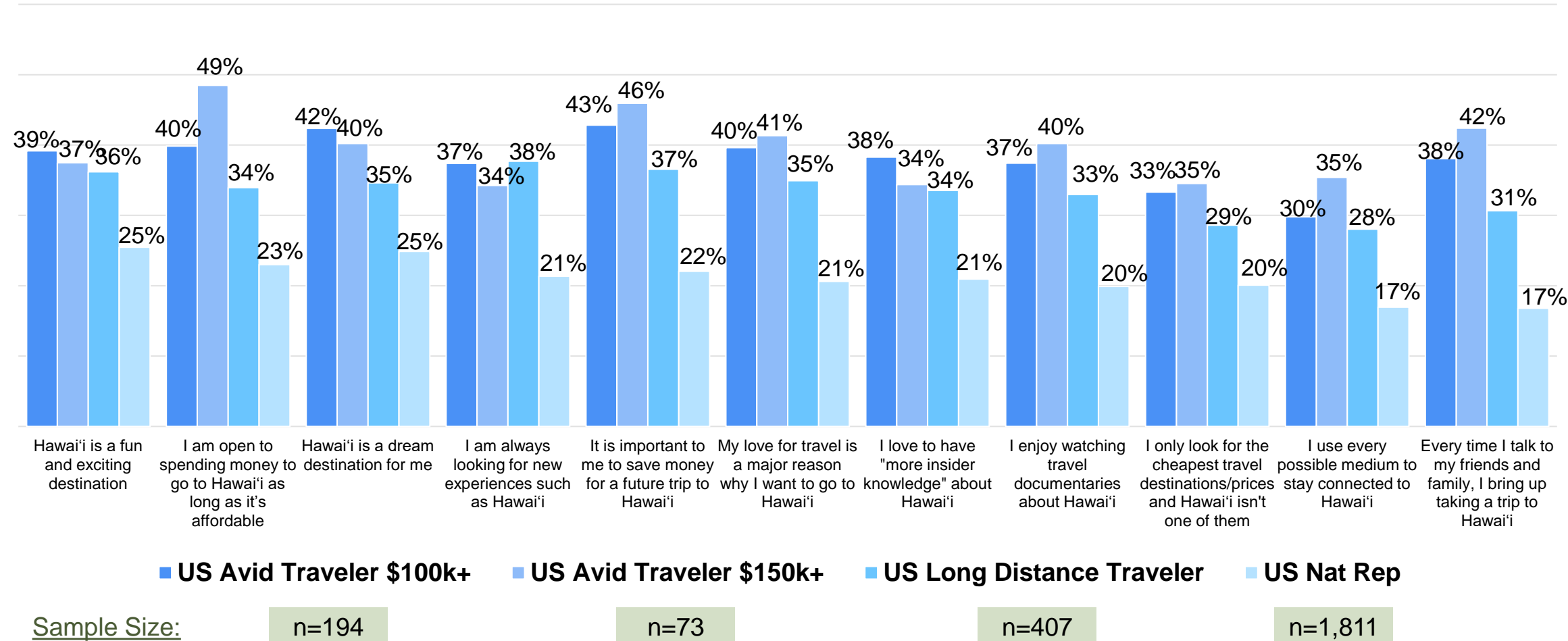
Sample Size: n=407

U.S. Nat Rep: Importance of Travel Factors



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

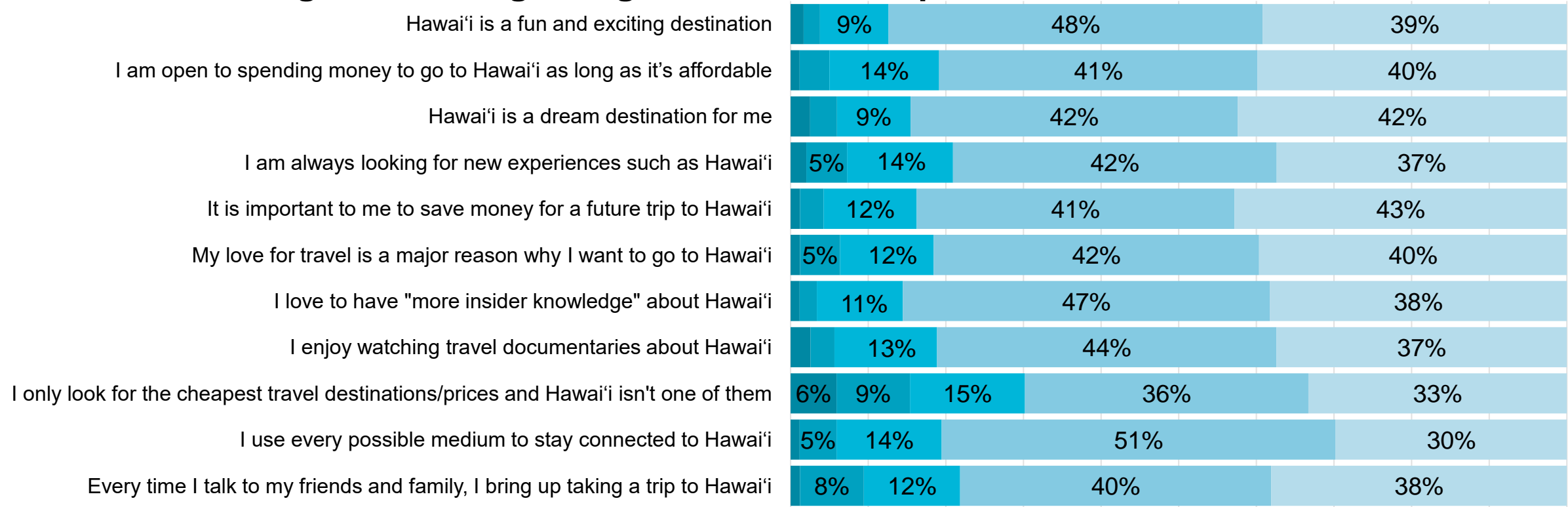
Agreement Regarding Hawai'i as a Travel Destination (Strongly Agree)



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

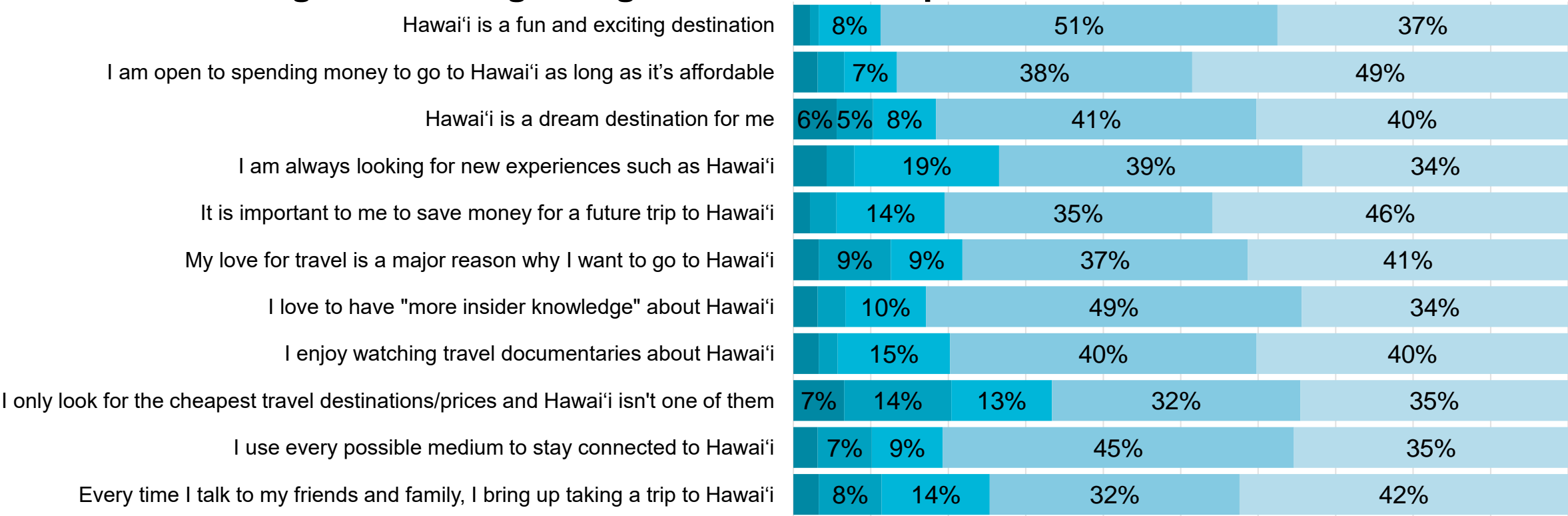


■ Strongly disagree ■ Disagree ■ Neither agree nor disagree ■ Agree ■ Strongly agree

Sample Size: n=194

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

Agreement Regarding Hawai'i as an Aspirational Destination

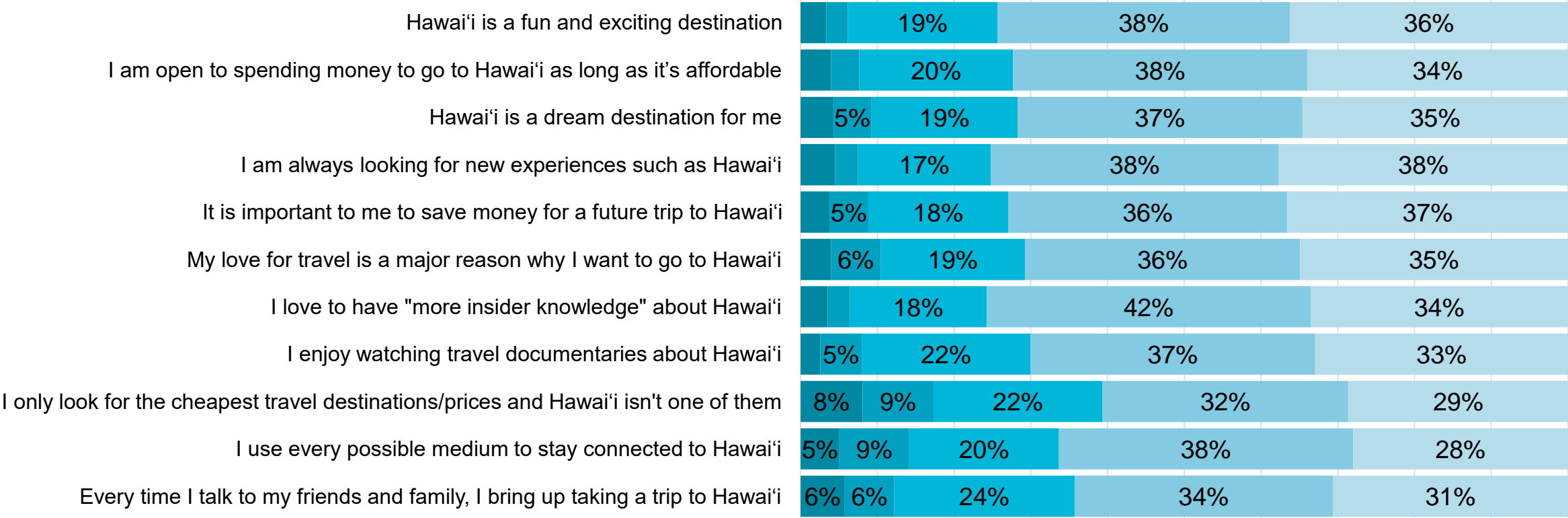


■ Strongly disagree ■ Disagree ■ Neither agree nor disagree ■ Agree ■ Strongly agree

Sample Size: n=73

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

Agreement Regarding Hawai'i as an Aspirational Destination

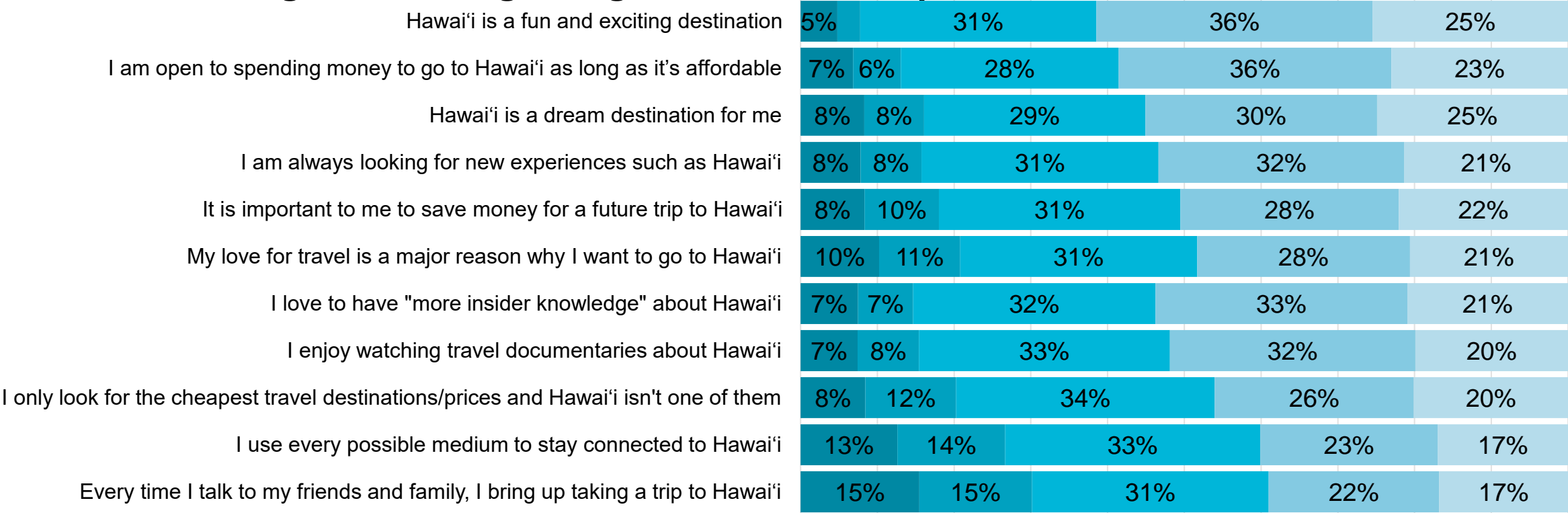


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U.S. Nat Rep: Hawai'i as an Aspirational Destination

Agreement Regarding Hawai'i as an Aspirational Destination

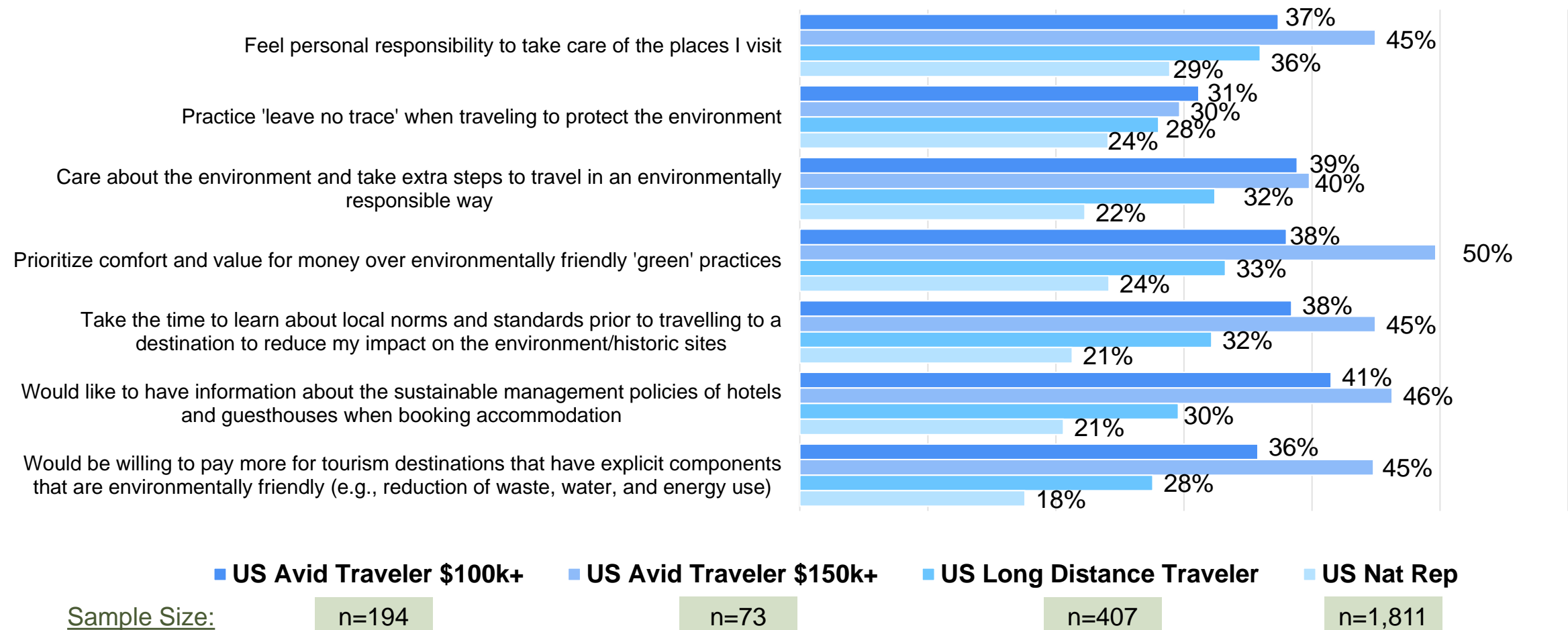


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Sample Size: n=1,811

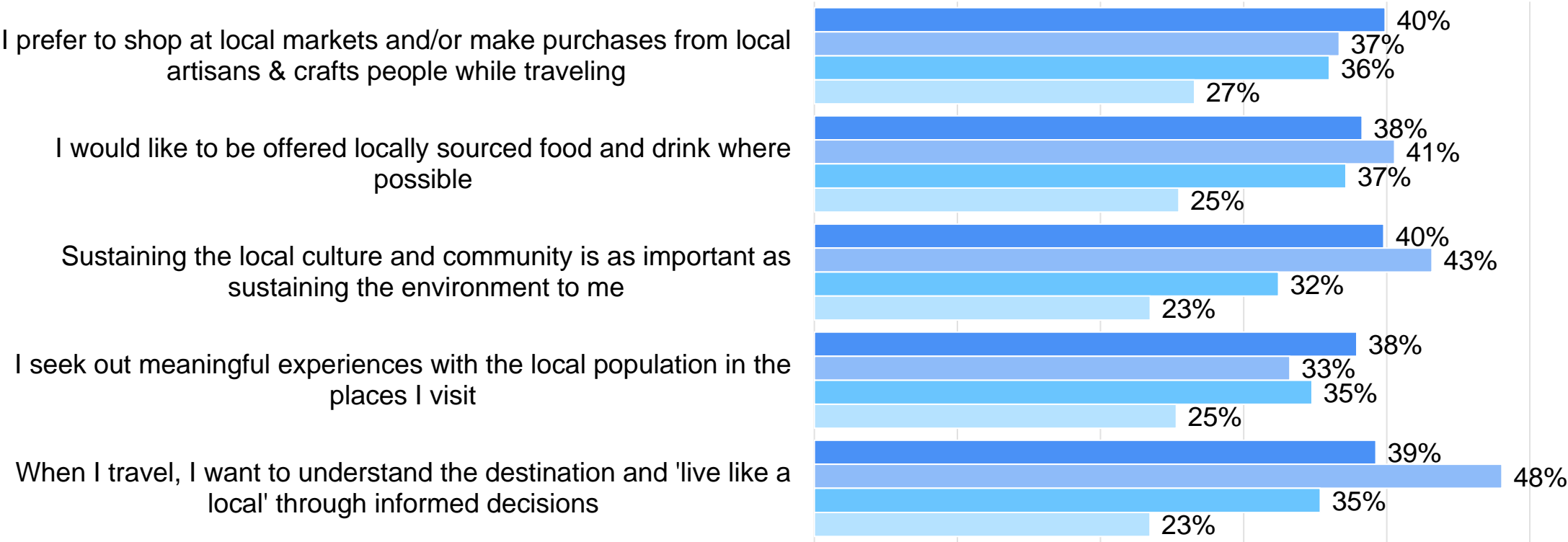
U.S. - Sustainability and Travel Responsibility Statements

Agreement Regarding Sustainable Practices While Traveling (Strongly Agree)



U.S. - Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling (Strongly Agree)

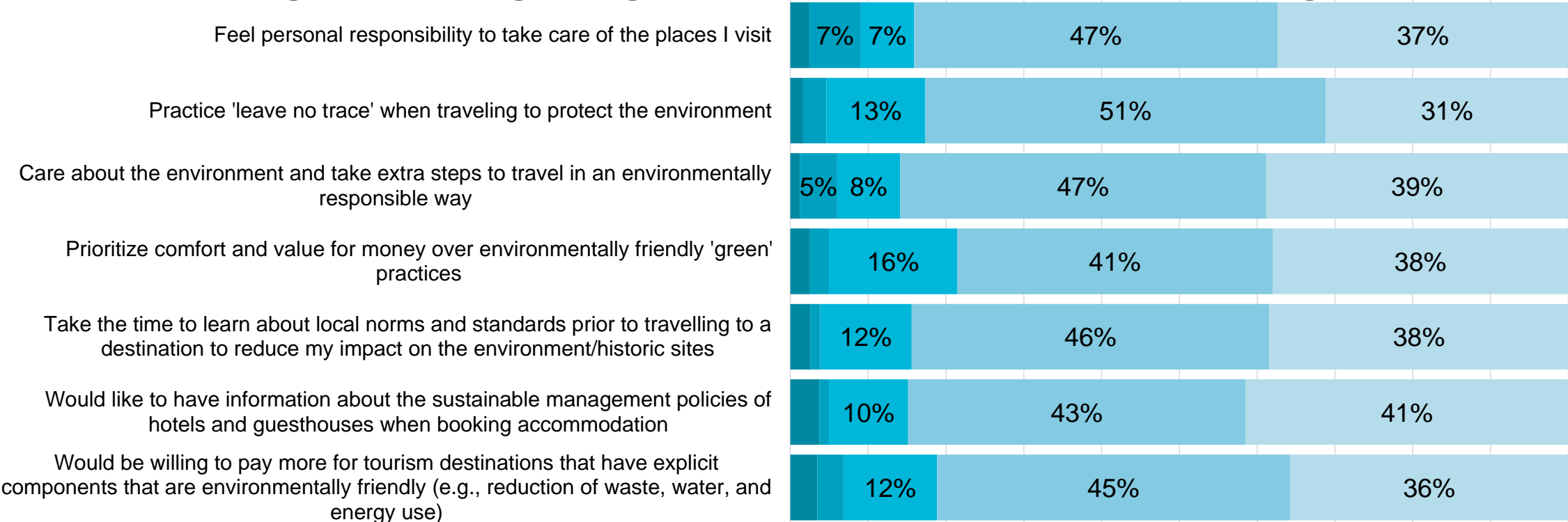


■ US Avid Traveler \$100k+ ■ US Avid Traveler \$150k+ ■ US Long Distance Traveler ■ US Nat Rep

Sample Size: n=194 n=73 n=407 n=1,811

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

Agreement Regarding Sustainable Practices While Traveling

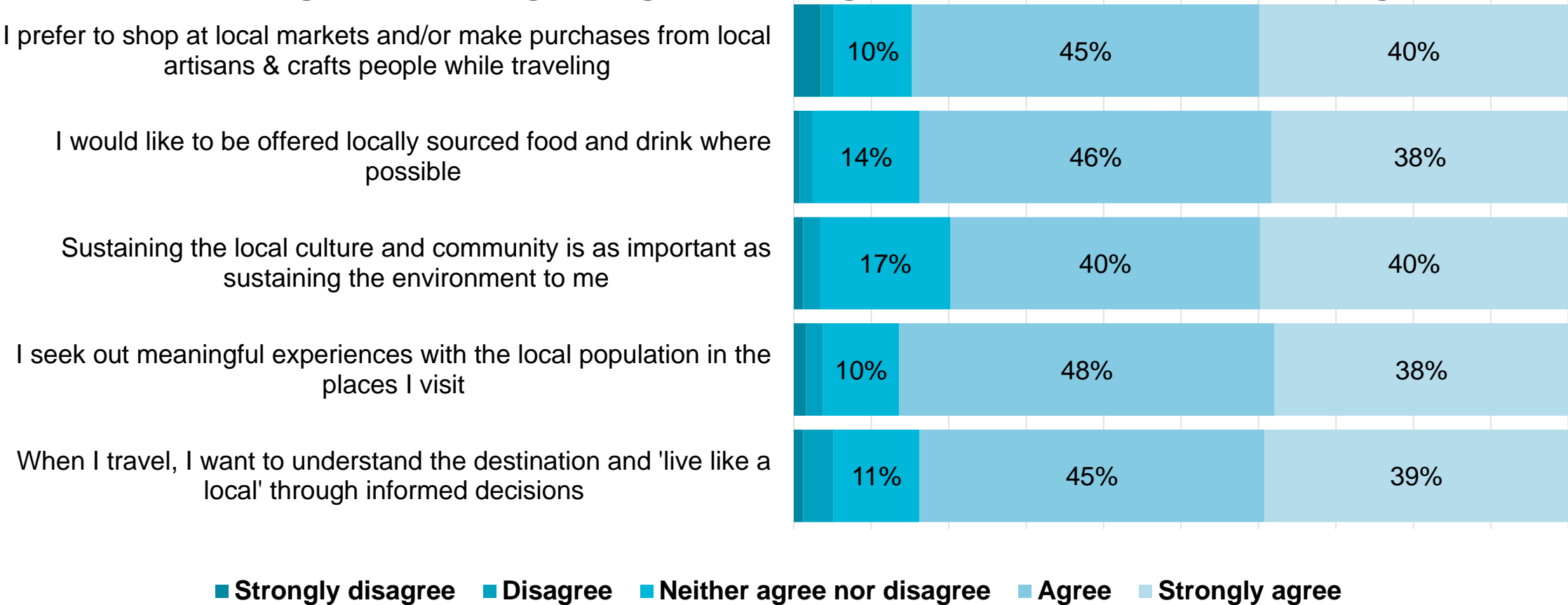


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U.S. Avid Travelers \$100k+: Sustainability and Travel Responsibility Statements

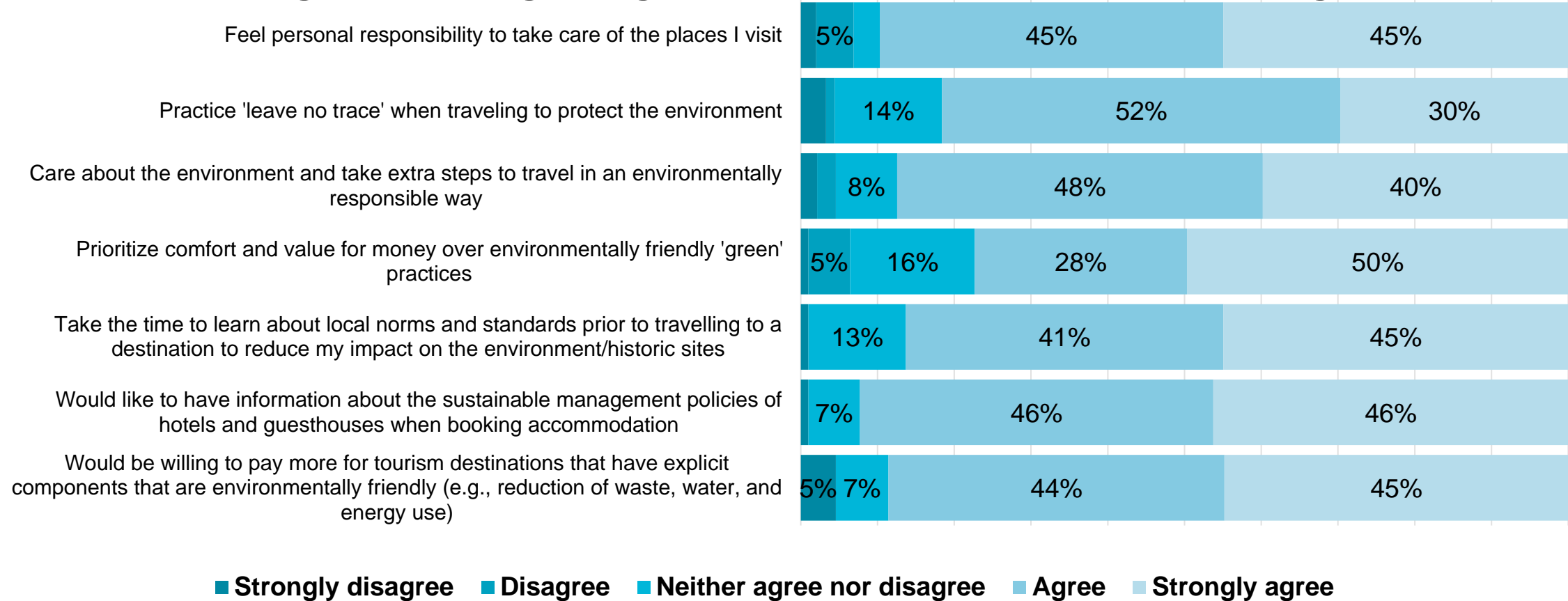
Agreement Regarding Sustaining Local Culture While Traveling



Sample Size: n=194

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

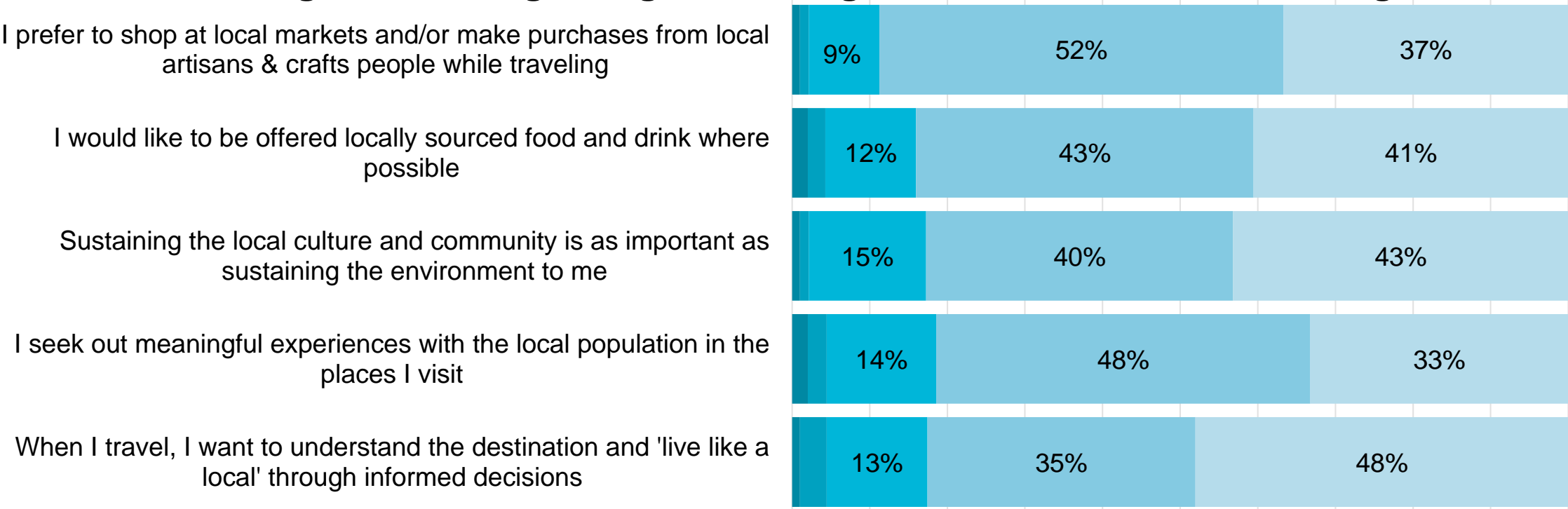
Agreement Regarding Sustainable Practices While Traveling



Sample Size: n=73

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

Agreement Regarding Sustaining Local Culture While Traveling

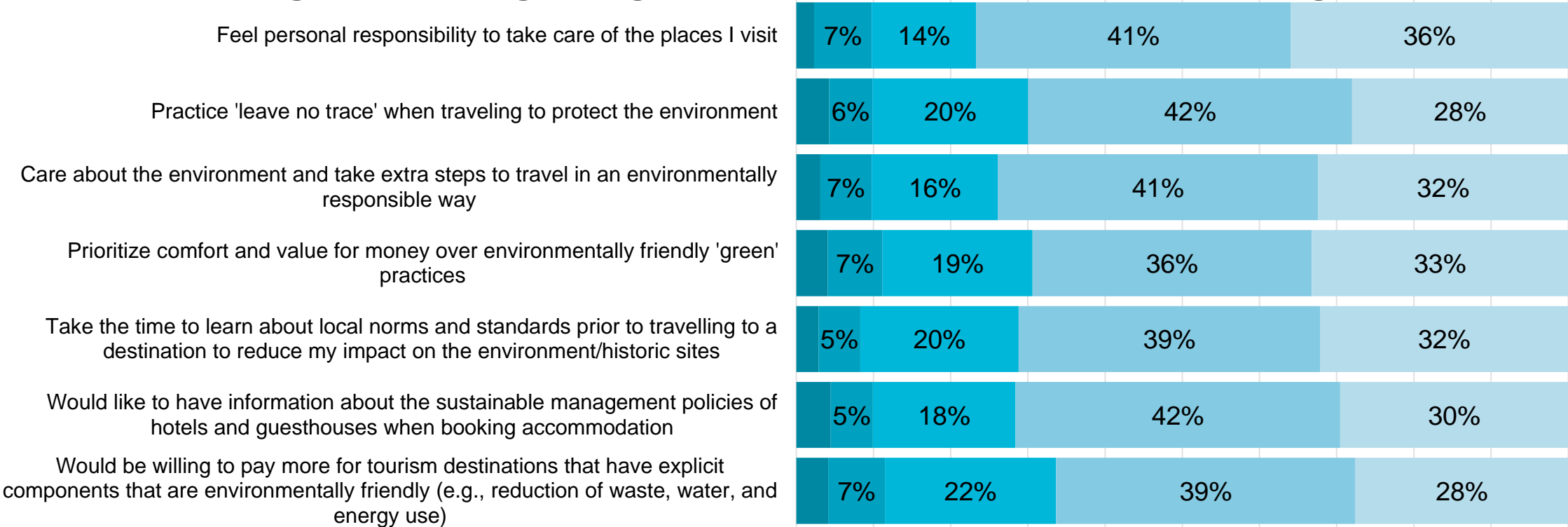


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U.S. Long Distance Traveler: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustainable Practices While Traveling

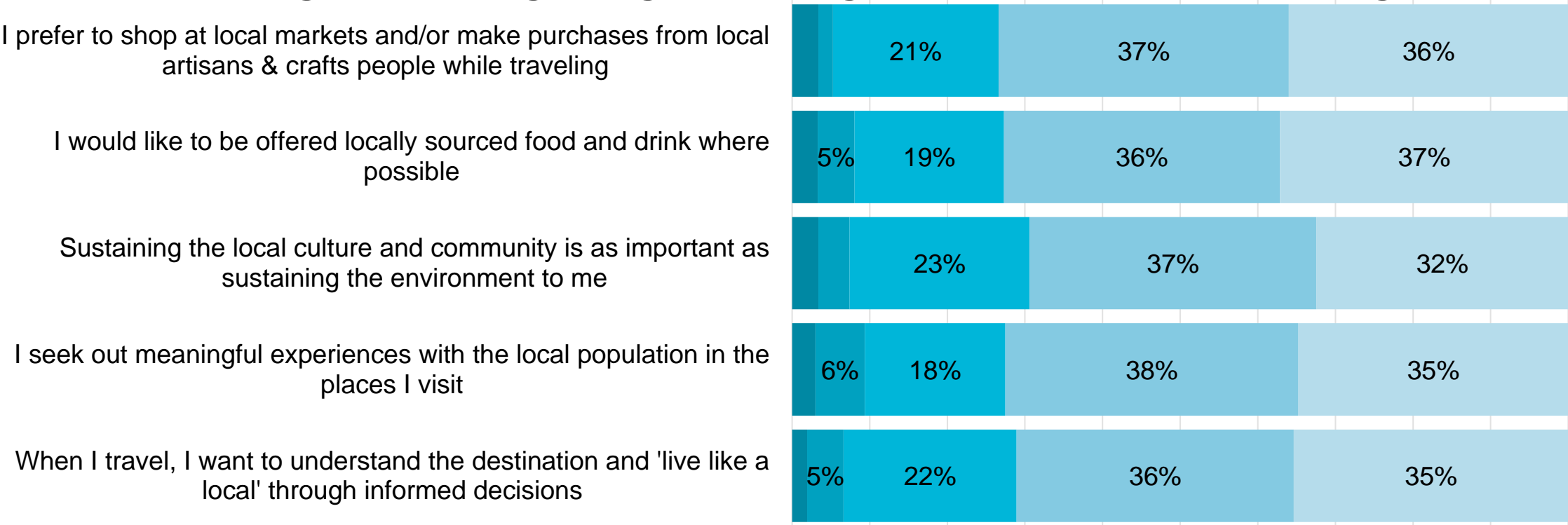


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U.S. Long Distance Traveler: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling

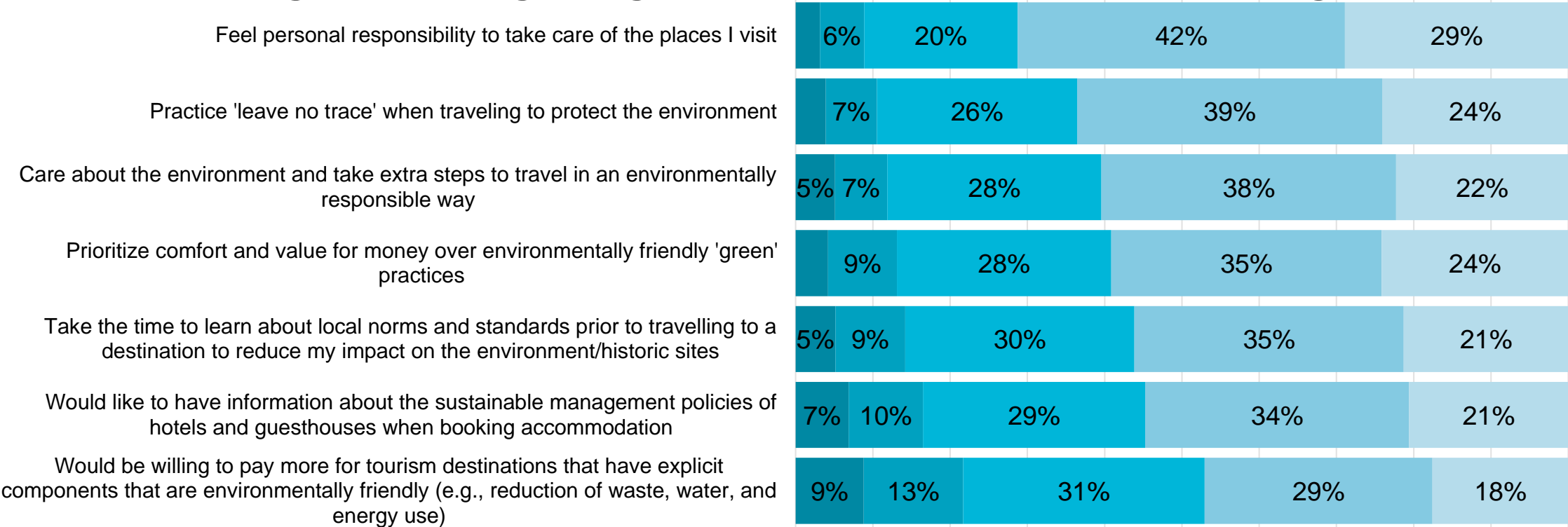


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U.S. Nat Rep: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustainable Practices While Traveling



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Sample Size: n=1,811

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

Agreement Regarding Sustaining Local Culture While Traveling

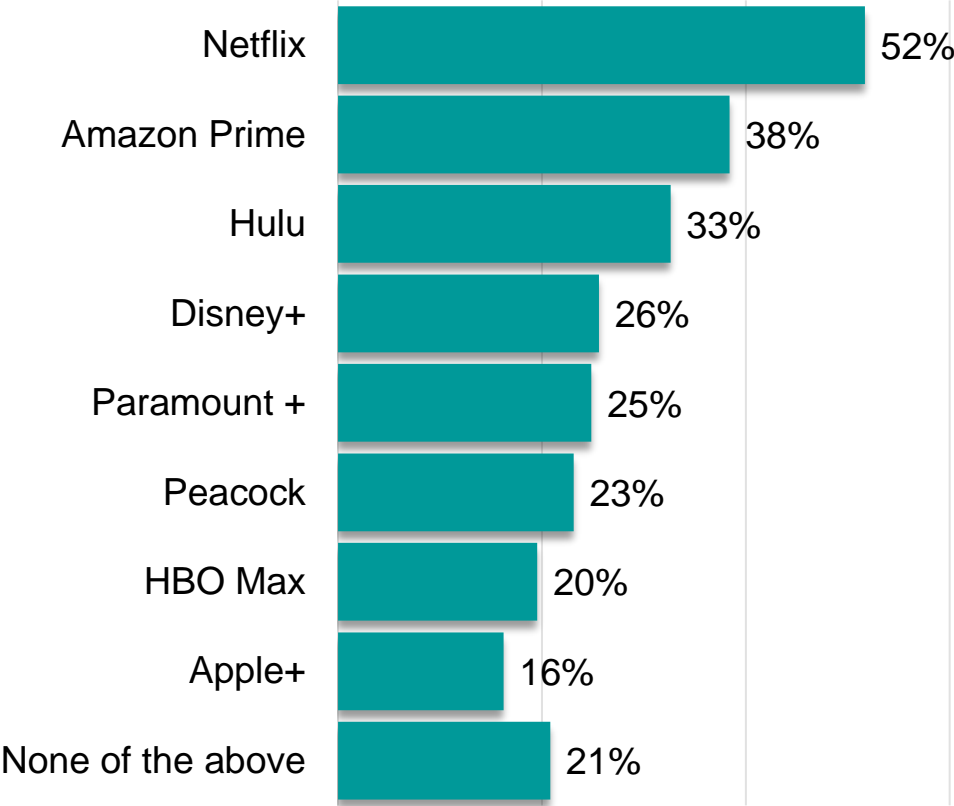


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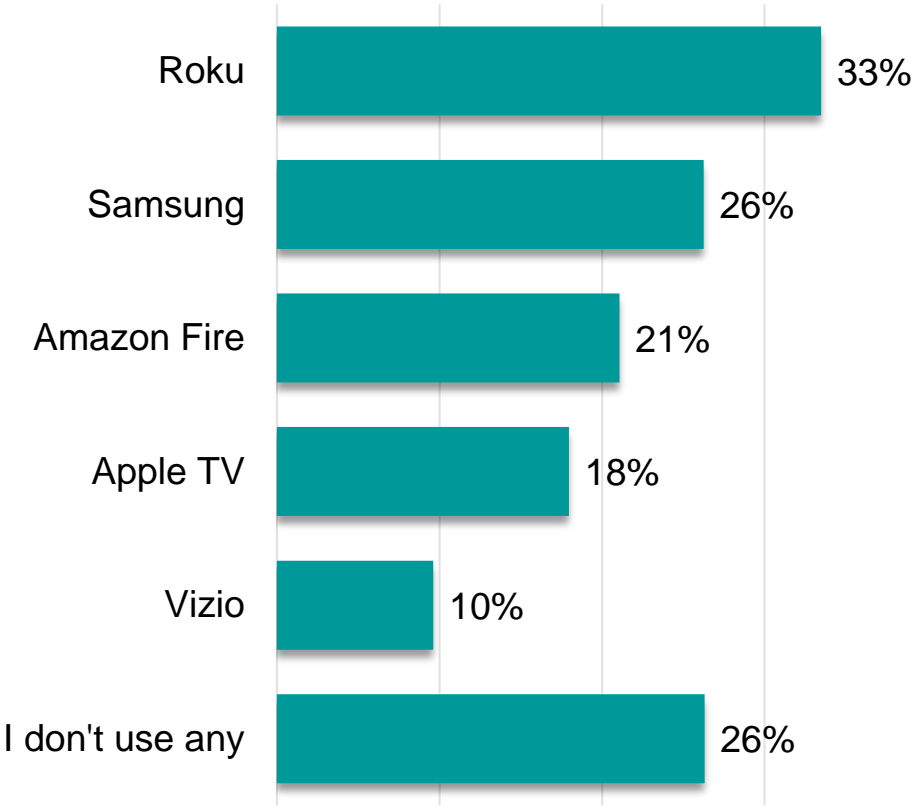
Sample Size: n=1,811

U.S. Media Consumption

Streaming Platforms Used Weekly



Connected Device Used

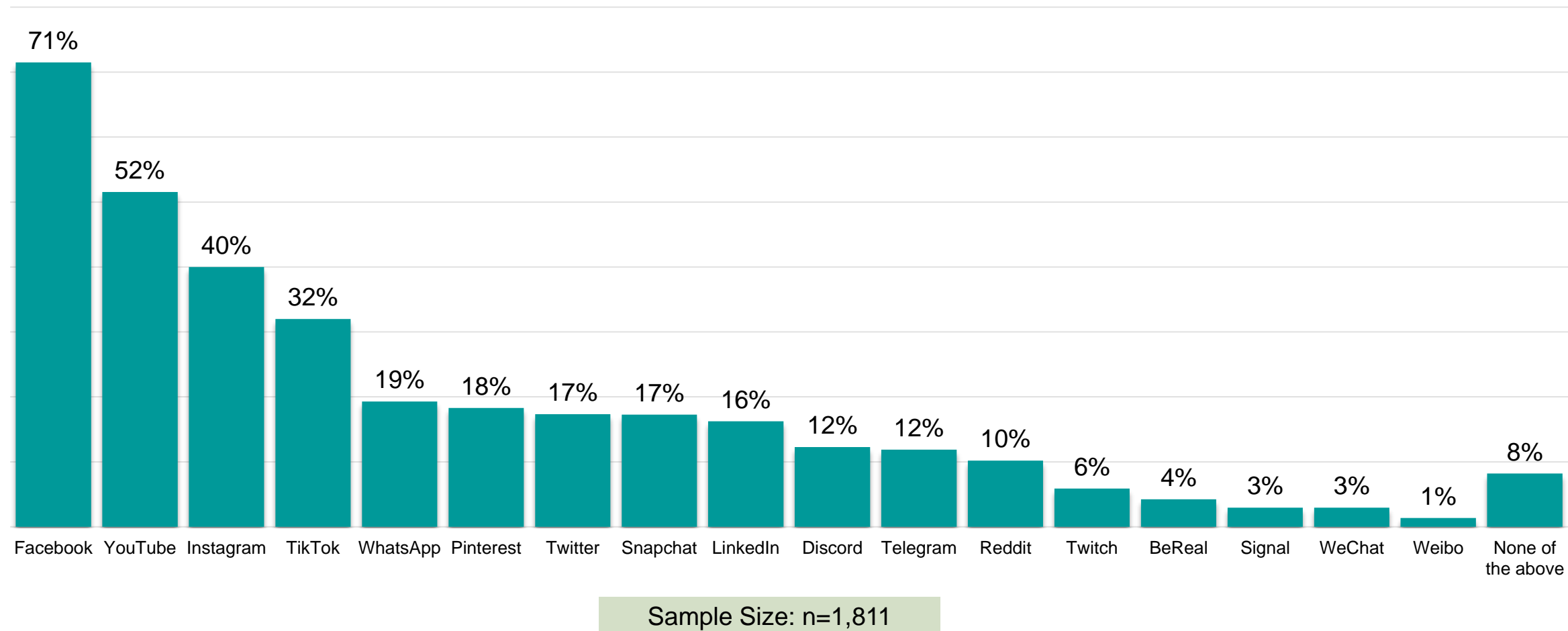


Sample Size: n=1,811

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



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	35%
Online	29%
Social Media	33%
TV commercials	27%
YouTube	34%
TV Program/Documentary	19%
Email	18%
Radio	10%
Newspaper	13%
Out of home advertising (e.g. Poster Billboards, bus shelter advertisements, etc.)	6%
I don't recall	18%

Actions Taken After Seeing an Ad for a Destination

I search for information about the destination online	35%
I talk to friends/family about the destination	30%
I go to the destination's website	29%
I look up the destination on social media	23%
I book travel to the destination almost immediately	13%
I don't do anything	19%
None of the above	13%

Sample Size: n=1,811