VISION INSIGHTS

Vision Insights U.S. Traveler Profiles May 2025

June 17, 2025



STATE OF HAWAI'I • 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
 - 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

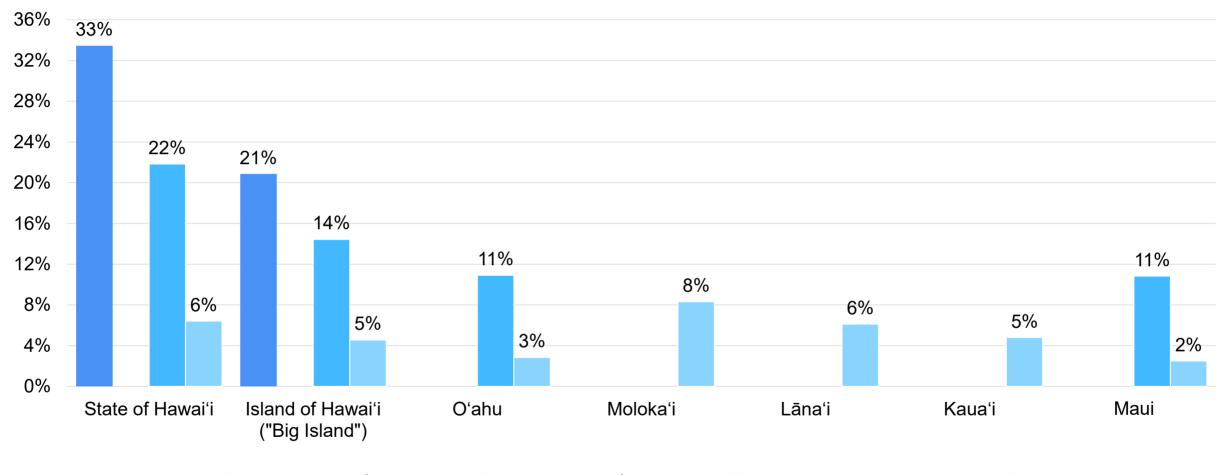
Avid Traveler \$150k+

- 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



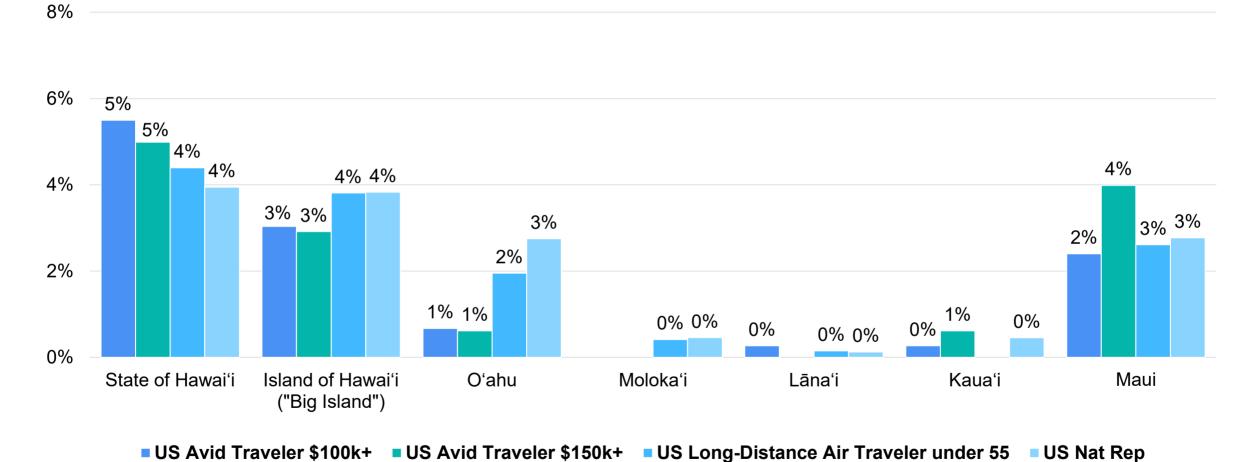
US Avid Traveler \$100k+ US Avid Traveler \$150k+ US Long-Distance Traveler US Nat Rep

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

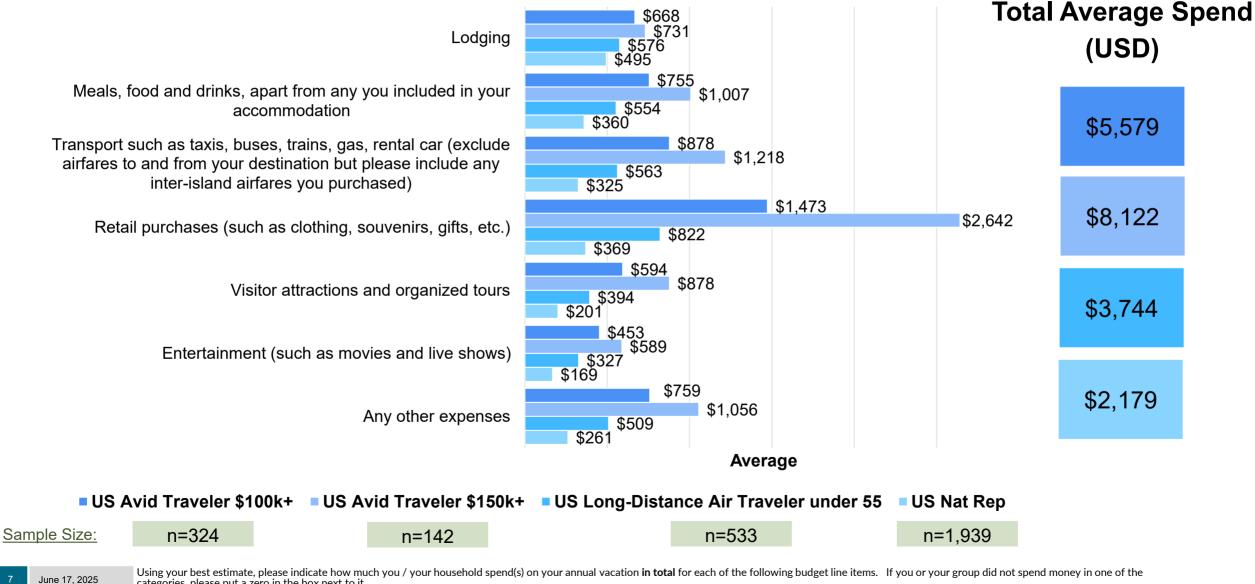


Sample Min. n=75

Top 10 States of Residence by Segment

US Avid Tr \$100 25-54	<	US Avid Trav \$150K 25-54, 2+ hous		US Long-Distar Traveler Under 55		US Nat Rep	
	%		%		%		%
New York	17.9%	Florida	10.1%	New York	12.4%	Florida	10.1%
California	13.8%	New York	8.6%	Florida	10.0%	New York	8.6%
Florida	8.6%	Texas	7.6%	California	9.4%	Texas	7.6%
Georgia	7.2%	California	6.4%	Texas	8.2%	California	6.4%
Texas	5.0%	Pennsylvania	5.7%	Georgia	6.0%	Pennsylvania	5.7%
Pennsylvania	4.1%	Illinois	3.5%	Pennsylvania	5.7%	Georgia	5.0%
Washington	3.0%	New Jersey	2.6%	Virginia	2.4%	Ohio	4.1%
Illinois	2.7%	Virginia	2.5%	Illinois	1.9%	North Carolina	4.0%
Virginia	1.1%	Washington	1.1%	Washington	1.5%	Illinois	3.5%
Minnesota	0.0%	Colorado	0.9%	Minnesota	1.2%	Virginia	2.5%
<u>ze:</u> n=32	4	n=142		n=533		n=1,939	

U.S. - Total Annual Holiday Spend

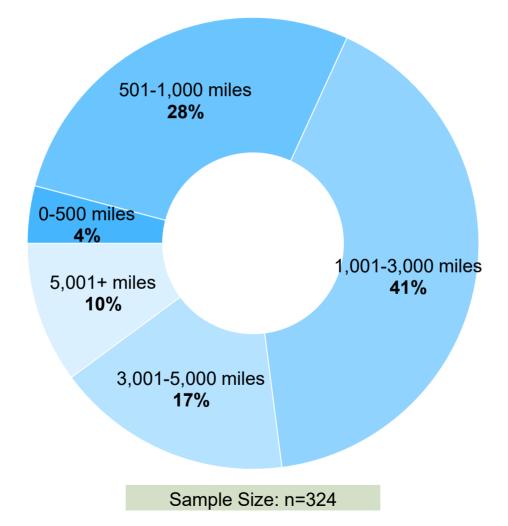


categories, please put a zero in the box next to it.

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

June 17, 2025

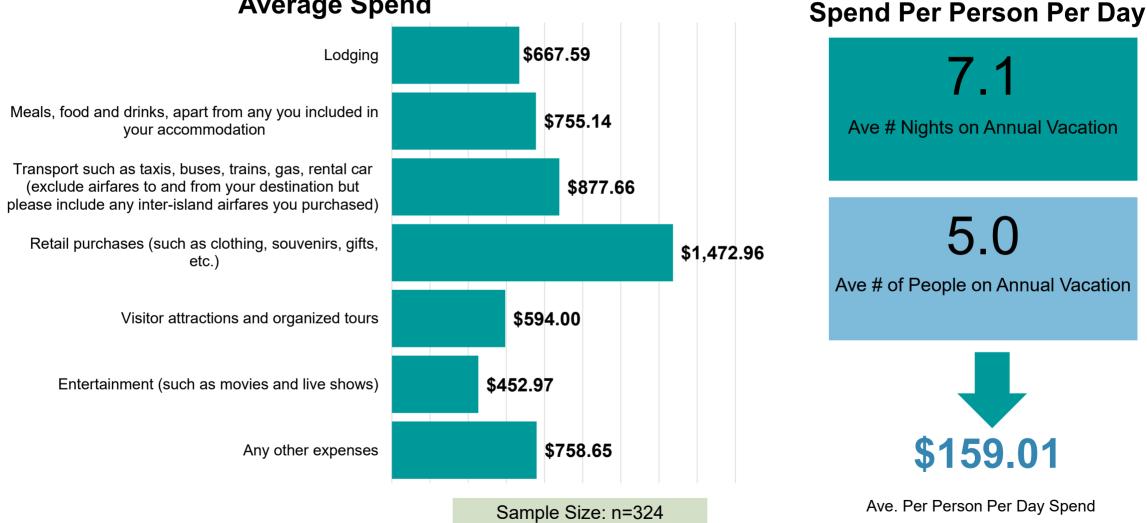
Distance Travelled on Annual Vacation



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

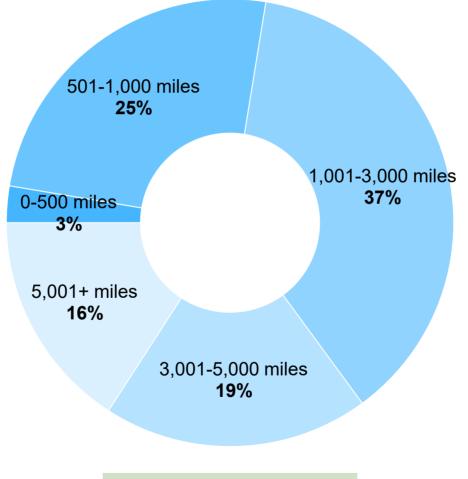
Average Spend

June 17, 2025



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

Distance Travelled on Annual Vacation



Sample Size: n=142

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

Average Spend

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

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)

Retail purchases (such as clothing, souvenirs, gifts, etc.)

Visitor attractions and organized tours

Entertainment (such as movies and live shows)



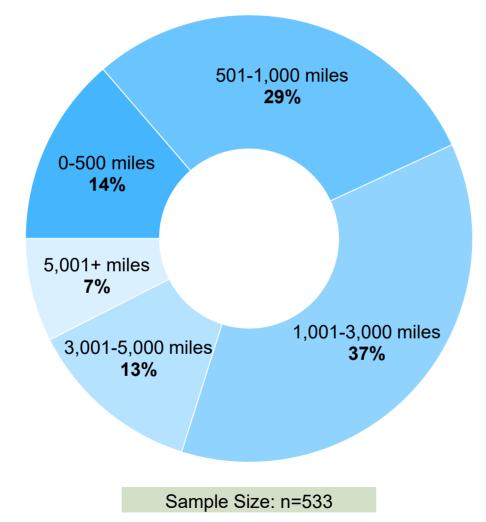
Sample Size: n=142

Spend Per Person Per Day



U.S. Long-Distance Travelers: Annual Vacation

Distance Travelled on Annual Vacation



U.S. Long-Distance Travelers: Annual Vacation

Average Spend

June 17, 2025

\$575.91 Lodging Meals, food and drinks, apart from any you included in \$554.17 your accommodation Transport such as taxis, buses, trains, gas, rental car (exclude airfares to and from your destination but please \$562.59 include any inter-island airfares you purchased) \$821.80 Retail purchases (such as clothing, souvenirs, gifts, etc.) \$393.70 Visitor attractions and organized tours \$326.74 Entertainment (such as movies and live shows) \$508.68 Any other expenses Sample Size: n=533

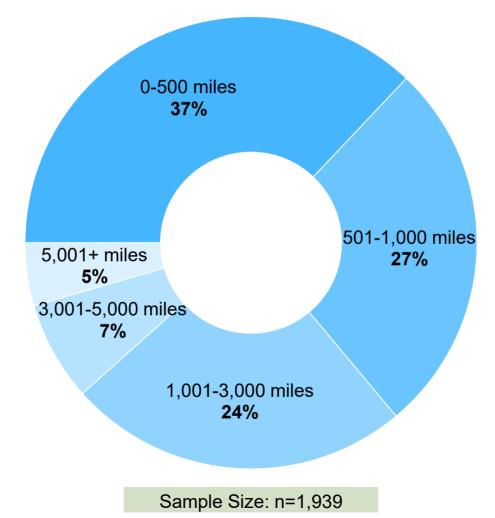
Spend Per Person Per Day



U.S. Nat Rep: Annual Vacation

June 17, 2025

Distance Travelled on Annual Vacation

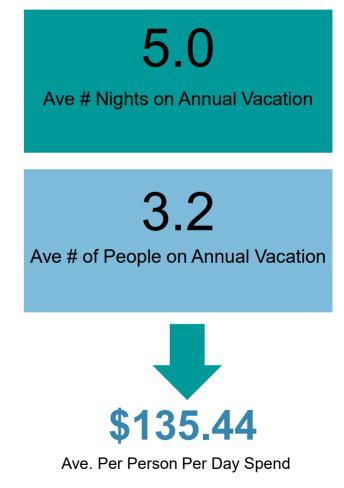


U.S. Nat Rep: Annual Vacation

Average Spend

\$495.00 Lodging Meals, food and drinks, apart from any you included in \$359.82 your accommodation Transport such as taxis, buses, trains, gas, rental car \$324.59 (exclude airfares to and from your destination but please include any inter-island airfares you purchased) Retail purchases (such as clothing, souvenirs, gifts, \$369.16 etc.) Visitor attractions and organized tours \$201.04 \$168.57 Entertainment (such as movies and live shows) \$261.26 Any other expenses Sample Size: n=1,939

Spend Per Person Per Day



U.S. - Importance of Travel Factors

		Very Impo	rtant 5	
	US: Avid Traveler \$100k+	US: Avid Traveler \$150k+	US: Long-Distance Air Traveler under 55	US Market
Comfort and accessibility	48%	55%	47%	50%
Value for money	48%	52%	49%	54%
Entertainment and nightlife	43%	44%	41%	31%
Consideration of sustainable principles	41%	48%	36%	28%
Natural attractions/activities	45%	52%	48%	46%
Cultural attractions	45%	50%	41%	37%
Opportunity to experience local restaurants/businesses	42%	48%	41%	39%
Family-friendly location and activities	48%	48%	44%	41%
Safe and Secure Destination	48%	54%	50%	59%
Sample Size:	n=324	n=142	n=533	n=1,939

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

	-								
									-
Г					Opportunity to				
	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	Safe and secure destination
Very Important 5	48%	48%	45%	48%	42%	45%	43%	41%	48%
■4	28%	32%	35%	33%	35%	36%	36%	33%	32%
■3	15%	14%	13%	12%	15%	12%	12%	17%	12%
2	5%	4%	5%	5%	3%	3%	4%	4%	2%
Not very Important 1	3%	2%	2%	3%	4%	4%	4%	4%	6%

Not very Important 1

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3

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Very Important 5

Sample Size: n=324

2

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

				_	-				-
									-
Г									
	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	Safe and secure destination
Very Important 5	52%	55%	52%	48%	48%	50%	44%	48%	54%
■4	29%	31%	32%	34%	39%	36%	40%	29%	30%
3	13%	11%	8%	11%	6%	5%	6%	17%	8%
2	2%	1%	7%	3%	2%	3%	4%	3%	1%
Not very Important 1	3%	2%	2%	3%	4%	6%	6%	4%	6%

Not very Important 1

2 3 ∎4

Very Important 5

Sample Size: n=142

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	Safe and secure destination
Very Important 5	49%	47%	48%	44%	41%	41%	41%	36%	50%
■4	27%	30%	31%	30%	32%	35%	32%	35%	27%
3	15%	15%	15%	17%	18%	16%	18%	17%	13%
2	7%	5%	4%	6%	6%	5%	5%	8%	6%
Not very Important 1	2%	3%	1%	3%	3%	3%	4%	4%	4%

Not very Important 1 2 3

∎4

Very Important 5

Sample Size: n=533

U.S. Nat Rep: Importance of Travel Factors

			-					-	
							-		
Г					Opportunity to				
	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	Safe and secure destination
Very Important 5	54%	50%	46%	41%	39%	37%	31%	28%	59%
■4	26%	28%	28%	25%	30%	31%	25%	27%	23%
3	13%	15%	18%	20%	21%	20%	22%	24%	12%
2	4%	4%	4%	7%	5%	5%	9%	9%	4%
Not very Important 1	3%	3%	4%	7%	5%	7%	12%	11%	3%

Not very Important 1

3

∎4

Very Important 5

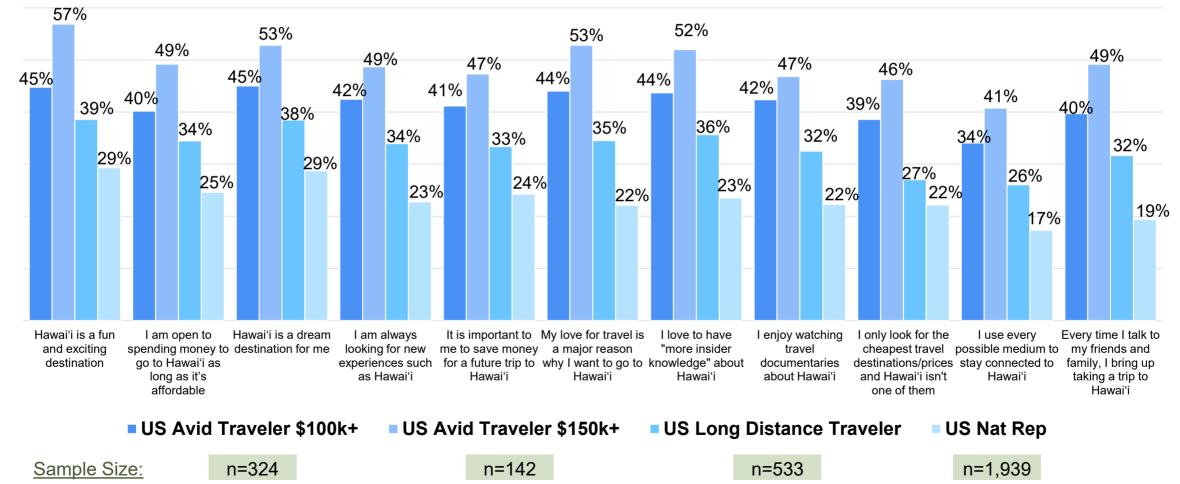
Sample Size: n=1,939

2

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

Agreement Regarding Hawai'i as a Travel Destination

(Strongly Agree)



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

Agreement Regarding Hawai'i as an Aspirational Destination

13%	37%	45%
13%	41%	40%
12%	40%	45%
11%	43%	42%
11%	44%	41%
9%	42%	44%
14%	40%	44%
15%	39%	42%
9% 14%	<mark>%</mark> 35%	39%
6% 14%	44%	34%
5% 10%	43%	40%

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=324

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

Agreement Regarding Hawai'i as an Aspirational Destination

, 0
6
6
1%

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=142

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

Agreement Regarding Hawai'i as an Aspirational Destination

ition		18%		38%		3	39%		
able	6%	16%		42%			34%		
me	5%	18%		37%		38%			
vai'i		19%		41%			34%		
<i>w</i> ai'i	7% 17%			40%		33%			
wai'i		20%		38%		35%			
waiʻi		17%		40%		36%			
waiʻi	6%	21%		37%)		32%		
nem	12	2%	24%		33%		27%		
vaiʻi	9%	21%	6	4	1%		26%		
vaiʻi	8%	20 %	6	36%			32%		

Hawai'i is a fun and exciting destinat I am open to spending money to go to Hawai'i as long as it's afforda 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 Haw My love for travel is a major reason why I want to go to Haw I love to have "more insider knowledge" about Haw I enjoy watching travel documentaries about Haw I only look for the cheapest travel destinations/prices and Hawai'i isn't one of the I use every possible medium to stay connected to Haw Every time I talk to my friends and family, I bring up taking a trip to Haw

Strongly disagree Disagree Neither agree nor disagree Agree Strongly agree

Sample Size: n=533

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

Agreement Regarding Hawai'i as an Aspirational Destination

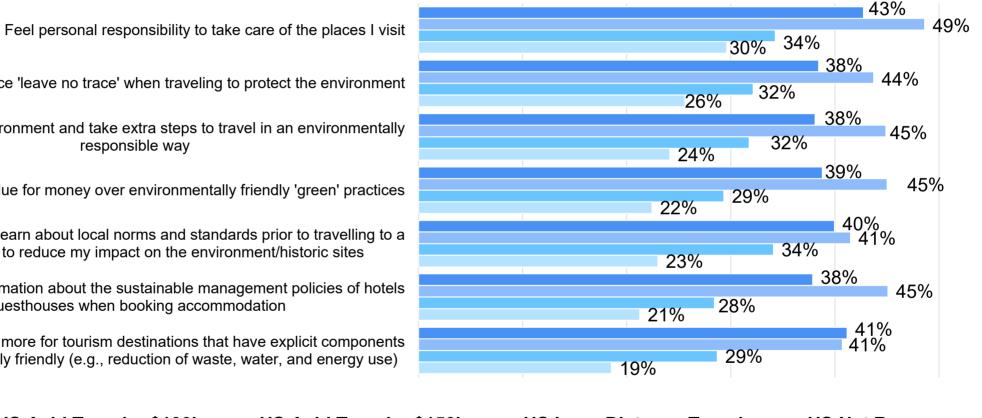
ition		27%		37%		29%
able	7% 6%	25%		39%		25%
me	8% 7%	25%		31%		29%
wai'i	7% 7%	28%)	34%		23%
<i>w</i> ai'i	9% 8%	6 27	'%	31%		24%
wai'i	9% 9%	% 3	80%	309	%	22%
wai'i	7% 6%	30%		34%		23%
vaiʻi	7% 7%	30%	6	33%		22%
nem	7% 11%	6	32%	27	'%	22%
vaiʻi	12%	13%	31%		27%	17%
vaiʻi	15%	14%	27%		25%	19%

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

Strongly disagree Disagree Neither agree nor disagree Agree Strongly agree

Sample Size: n=1,939

U.S. - Sustainability and Travel Responsibility Statements **Agreement Regarding Sustainable Practices While Traveling** (Strongly Agree)



Practice 'leave no trace' when traveling to protect the environment

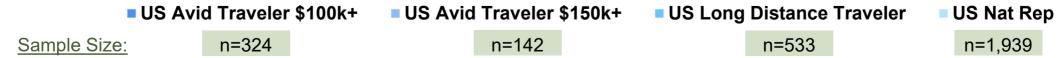
Care about the environment and take extra steps to travel in an environmentally responsible way

Prioritize comfort and value for money over environmentally friendly 'green' practices

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

Would like to have information about the sustainable management policies of hotels and guesthouses when booking accommodation

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)



Please indicate your level of agreement or disagreement with each of the following statements regarding sustainability and environmental practices while you are travelling. | Please indicate the extent to which you agree or disagree with the following statements about sustainability of culture and community.

U.S. - 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

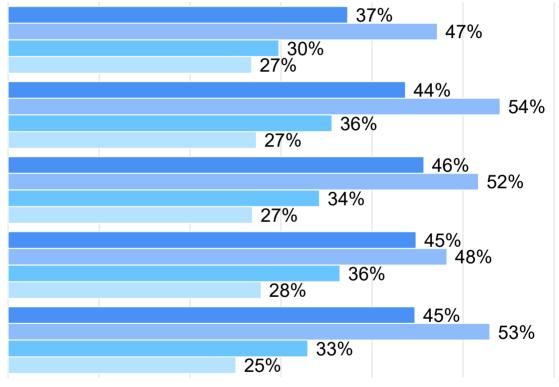
I would like to be offered locally sourced food and drink where possible

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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US Avid Traveler \$100k+		US Avid Traveler \$150k+		US Long Distance Traveler		US Nat Rep					
Sample Size:		n=324			n=142			n=533		n=1,939	

June 17, 2025 Please indicate your level of agreement or disagreement with each of the following statements regarding sustainability and environmental practices while you are travelling. | Please indicate the extent to which you agree or disagree with the following statements about sustainability of culture and community.

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	10%	41%	43%
Practice 'leave no trace' when traveling to protect the environment	12%	41%	38%
Care about the environment and take extra steps to travel in an environmentally responsible way	9%	48%	38%
Prioritize comfort and value for money over environmentally friendly 'green' practices	<mark>5%</mark> 6% 8%	42%	39%
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%	44%	40%
Would like to have information about the sustainable management policies of hotels and guesthouses when booking accommodation	5% 10%	45%	38%
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%	44%	41%
Strongly disagree	ree nor disagr	ree ■Agree ■Strongl	y agree

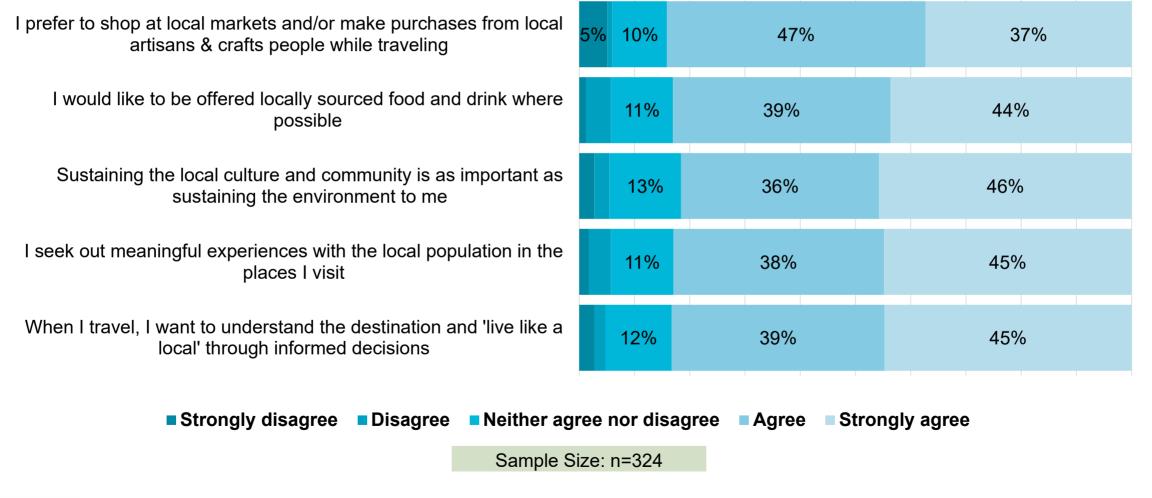
Sample Size: n=324

Please indicate your level of agreement or disagreement with each of the following statements regarding sustainability and environmental practices while you are travelling. | Please indicate the extent to which you agree or disagree with the following statements about sustainability of culture and community.

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

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Agreement Regarding Sustaining Local Culture While Traveling



June 17, 2025 Please indicate your level of agreement or disagreement with each of the following statements regarding sustainability and environmental practices while you are travelling. | Please indicate the extent to which you agree or disagree with the following statements about sustainability of culture and community.

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	<mark>5%</mark>	39%	49%
Practice 'leave no trace' when traveling to protect the environment	8%	41%	44%
Care about the environment and take extra steps to travel in an environmentally responsible way	8%	43%	45%
Prioritize comfort and value for money over environmentally friendly 'green' practices	5% <mark>5%</mark>	42%	45%
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%	46%	41%
Would like to have information about the sustainable management policies of hotels and guesthouses when booking accommodation	<mark>6%</mark>	44%	45%
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)		51%	41%
Strongly disagree	ee nor disag	ree Agree Stroi	ngly agree

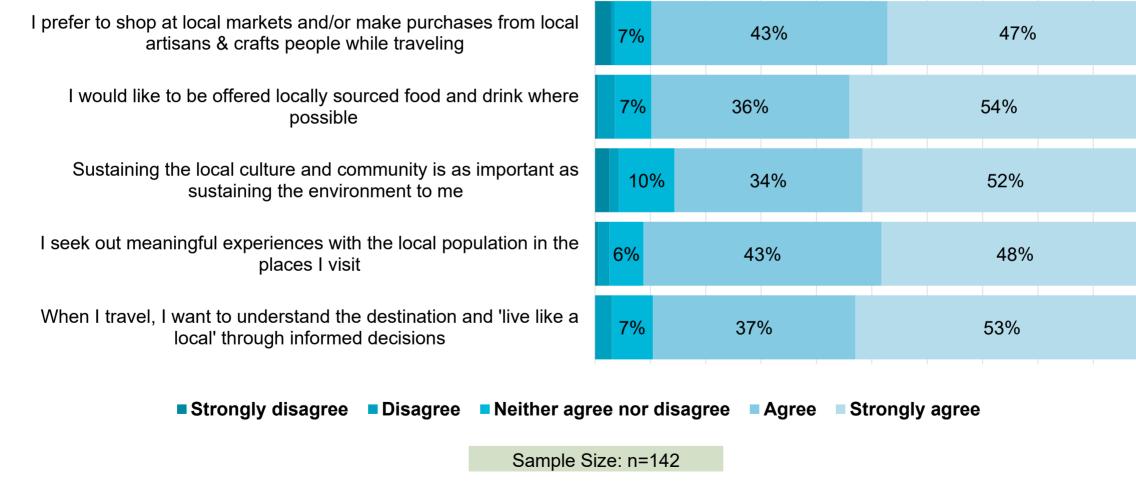
Sample Size: n=142

Please indicate your level of agreement or disagreement with each of the following statements regarding sustainability and environmental practices while you are travelling. | Please indicate the extent to which you agree or disagree with the following statements about sustainability of culture and community.

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

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Agreement Regarding Sustaining Local Culture While Traveling



June 17, 2025 Please indicate your level of agreement or disagreement with each of the following statements regarding sustainability and environmental practices while you are travelling. | Please indicate the extent to which you agree or disagree with the following statements about sustainability of culture and community.

U.S. 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	5%	16%	42%	34%
Practice 'leave no trace' when traveling to protect the environment	8%	17%	39%	32%
Care about the environment and take extra steps to travel in an environmentally responsible way	6%	17%	40%	32%
Prioritize comfort and value for money over environmentally friendly 'green' practices	6%	18%	43%	29%
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%	15%	42%	34%
Would like to have information about the sustainable management policies of hotels and guesthouses when booking accommodation	<mark>5%</mark> 5%	16%	46%	28%
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)	6%	16%	45%	29%
Strongly disagree Disagree Neither agree nor disagree Agree Strongly agree				

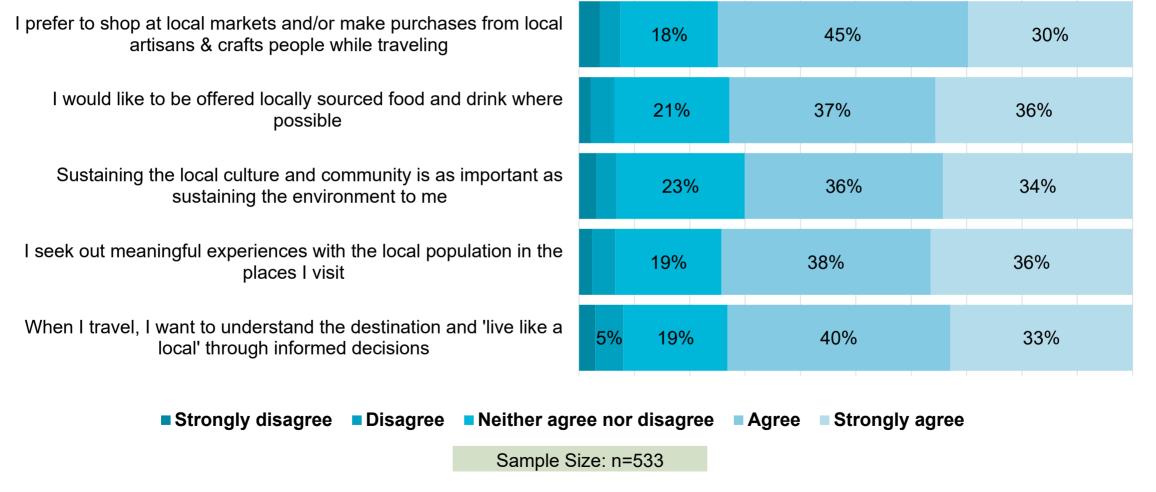
Sample Size: n=533

Please indicate your level of agreement or disagreement with each of the following statements regarding sustainability and environmental practices while you are travelling. | Please indicate the extent to which you agree or disagree with the following statements about sustainability of culture and community.

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

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Agreement Regarding Sustaining Local Culture While Traveling



June 17, 2025 Please indicate your level of agreement or disagreement with each of the following statements regarding sustainability and environmental practices while you are travelling. | Please indicate the extent to which you agree or disagree with the following statements about sustainability of culture and community.

U.S. 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%	19%	ó	43%	30%
Practice 'leave no trace' when traveling to protect the environment	5% 7 9	%	23%	40%	26%
Care about the environment and take extra steps to travel in an environmentally responsible way	6% 6	6%	25%	38%	24%
Prioritize comfort and value for money over environmentally friendly 'green' practices	5% 8	8%	27%	37%	22%
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	6% 7	7%	26%	37%	23%
Would like to have information about the sustainable management policies of hotels and guesthouses when booking accommodation	7%	8%	27%	36%	21%
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)	9%	13%	28%	6 32%	19%
Strongly disagroo Disagroo Noithor agr	00 00	r dicaar		o Strongly agroo	

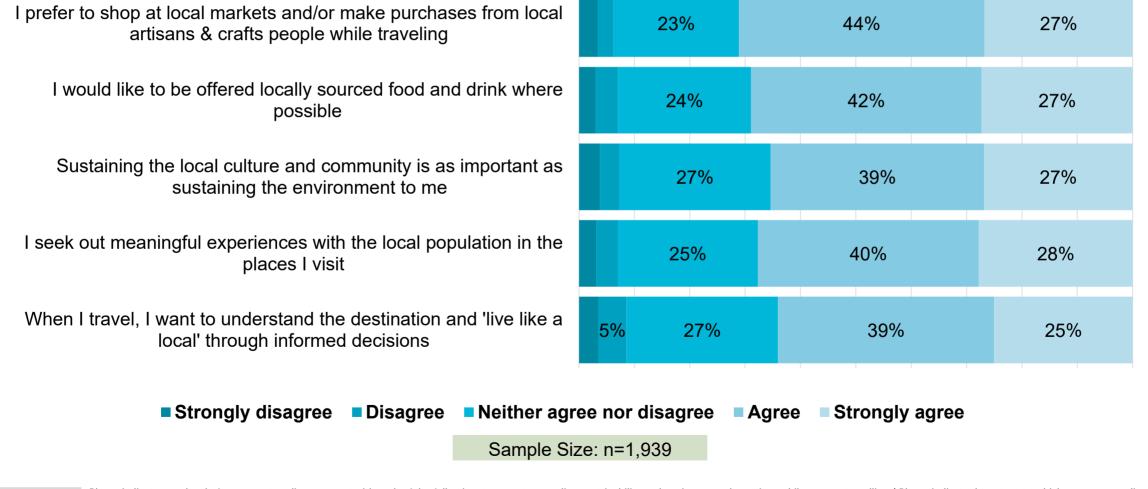
Strongly disagree Disagree Neither agree nor disagree Agree Strongly agree

Sample Size: n=1,939

Please indicate your level of agreement or disagreement with each of the following statements regarding sustainability and environmental practices while you are travelling. | Please indicate the extent to which you agree or disagree with the following statements about sustainability of culture and community.

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

Agreement Regarding Sustaining Local Culture While Traveling



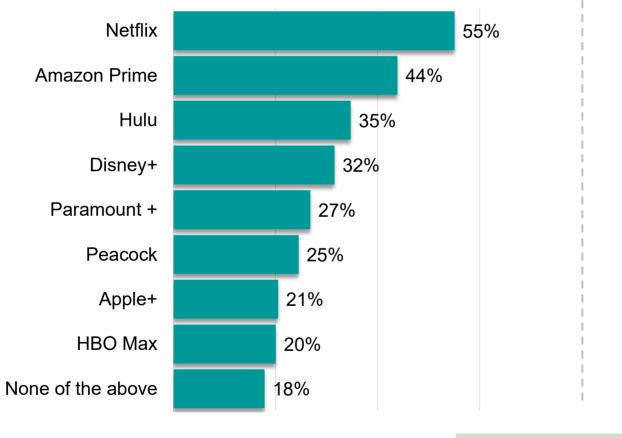
June 17, 2025

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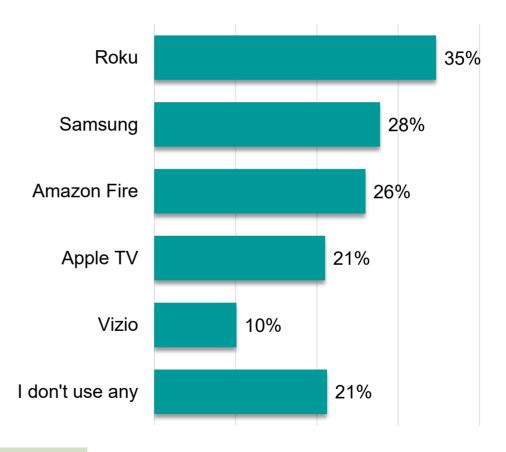
Please indicate your level of agreement or disagreement with each of the following statements regarding sustainability and environmental practices while you are travelling. | Please indicate the extent to which you agree or disagree with the following statements about sustainability of culture and community.

U.S. Media Consumption

Streaming Platforms Used Weekly



Connected Device Used



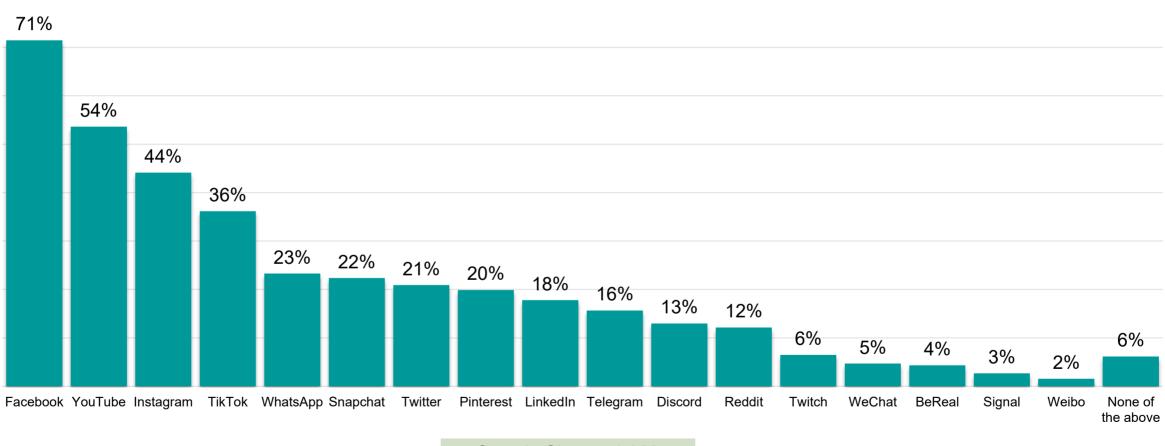
Sample Size: n=1,939

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 June 17, 2025

U.S. Media Consumption

Social Media Platforms Used Weekly



Sample Size: n=1,939

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U.S. Media Consumption

Travel Destination Source of Awareness

Friends/Family	38%
Online	30%
Social Media	37%
TV commercials	28%
YouTube	35%
TV Program/Documentary	20%
Email	17%
Radio	9%
Newspaper	12%
Out of home advertising (e.g. Poster Billboards, bus shelter advertisements, etc.)	7%
l don't recall	14%

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	31%
I go to the destination's website	32%
I look up the destination on social media	28%
I book travel to the destination almost immediately	15%
I don't do anything	16%
None of the above	11%

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