



Vision Insights U.S. Traveler Profiles August 2025

September 29, 2025



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
 - 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

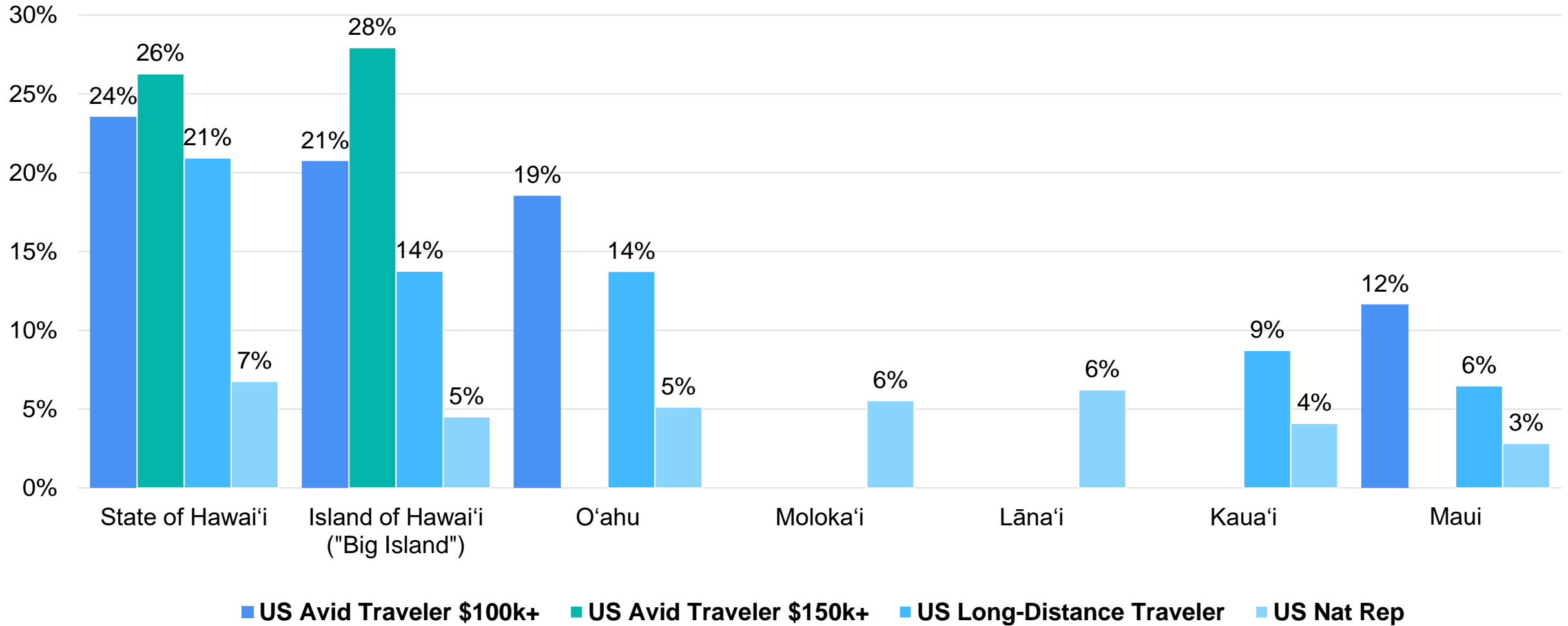
Avid Traveler \$150k+

- 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

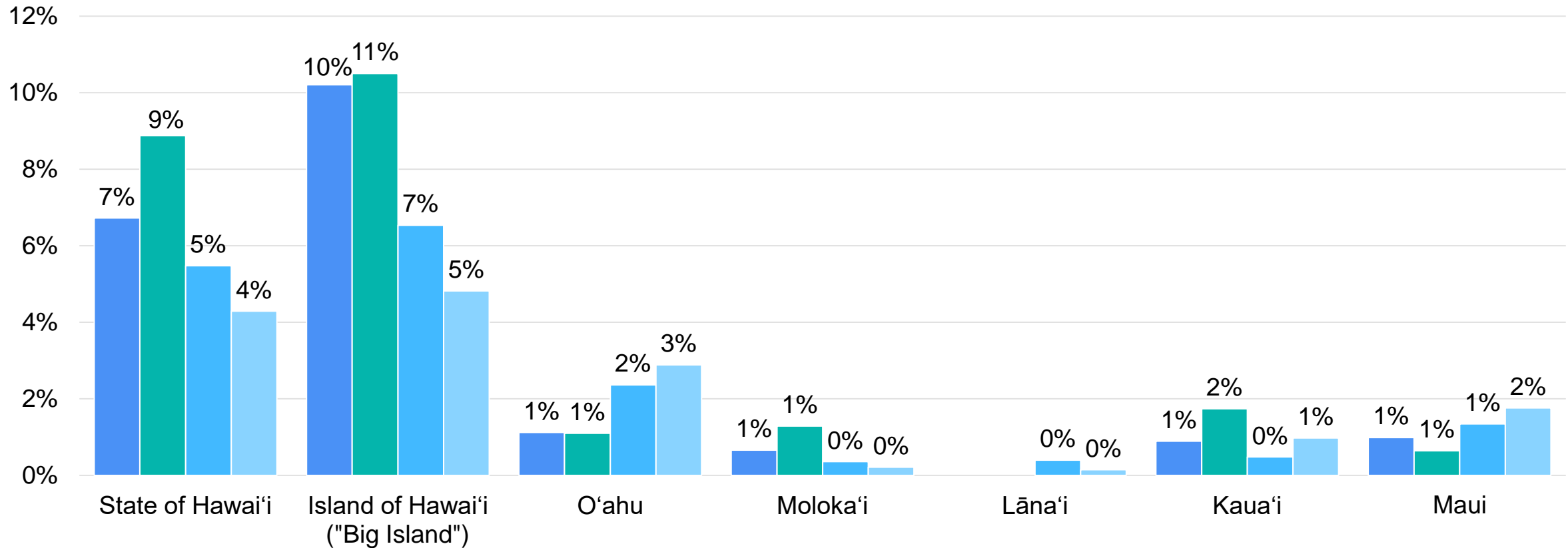
U.S. - Leisure Trip In Past 12 Months



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



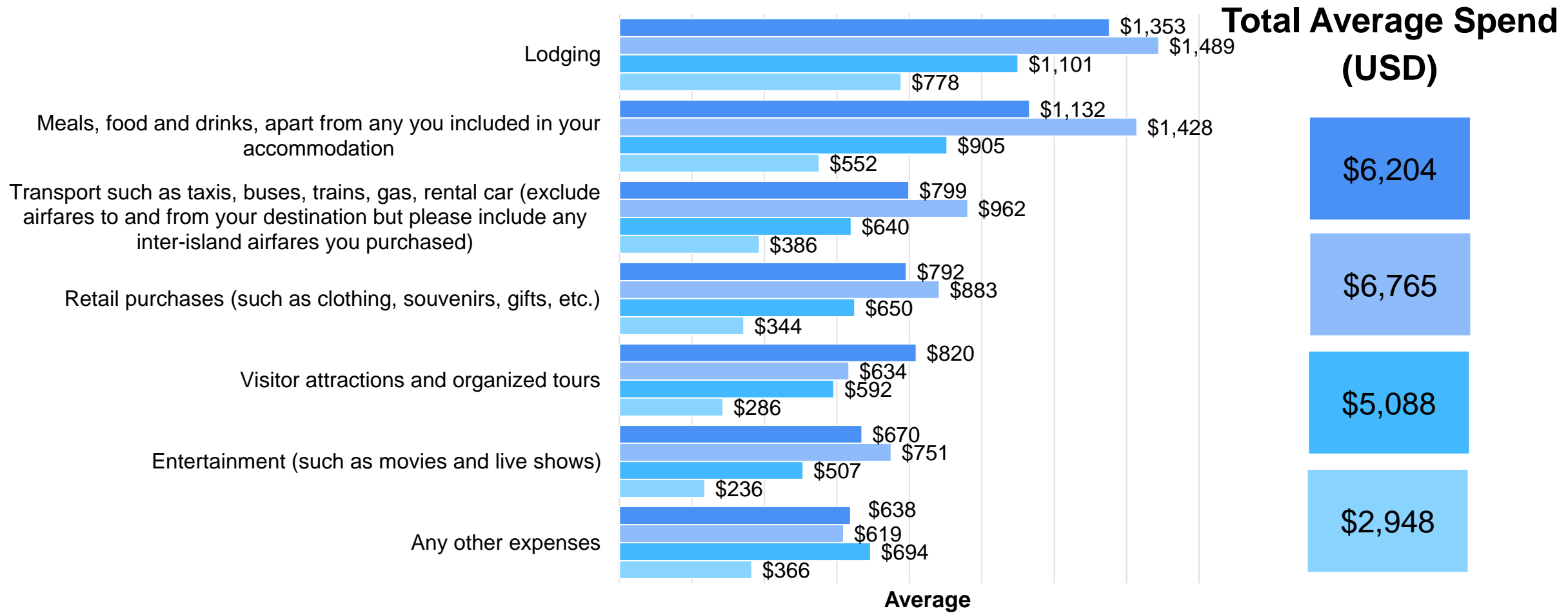
■ US Avid Traveler \$100k+
 ■ US Avid Traveler \$150k+
 ■ US Long-Distance Air Traveler under 55
 ■ US Nat Rep

Sample Min. n=75

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	24.2%	New York	11.9%	New York	19.7%	New York	11.9%
California	21.6%	Florida	8.8%	California	14.3%	Florida	8.8%
Illinois	8.1%	California	8.6%	Texas	8.4%	California	8.6%
Florida	7.5%	Texas	6.7%	Florida	8.2%	Texas	6.7%
Texas	6.9%	Pennsylvania	4.5%	Illinois	6.0%	Pennsylvania	4.5%
Virginia	3.4%	Illinois	4.4%	Virginia	3.8%	Illinois	4.4%
Washington	2.6%	Virginia	2.9%	Pennsylvania	2.7%	Ohio	3.9%
Pennsylvania	2.3%	New Jersey	2.5%	Georgia	2.2%	North Carolina	3.6%
Georgia	2.2%	Washington	1.5%	Washington	1.7%	Georgia	2.9%
Minnesota	0.8%	Colorado	1.1%	Minnesota	0.8%	Virginia	2.9%
Sample Size:	n=276	Sample Size:	n=143	Sample Size:	n=507	Sample Size:	n=1,902

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=276

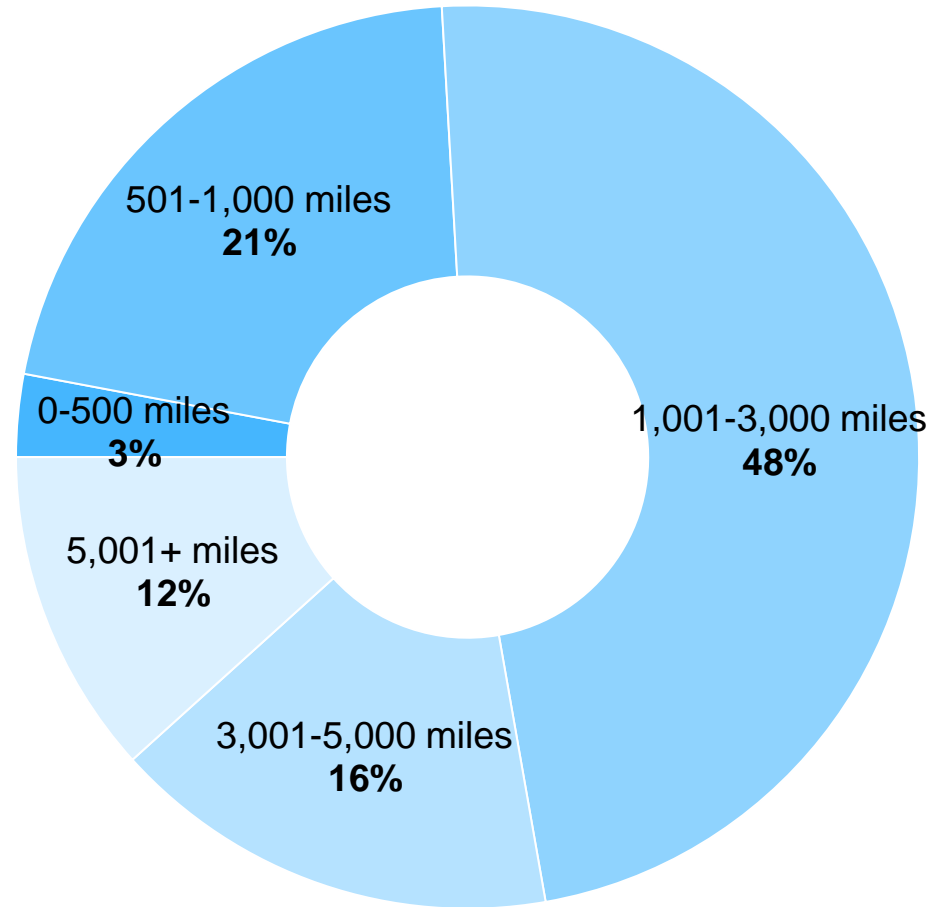
n=143

n=507

n=1,902

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

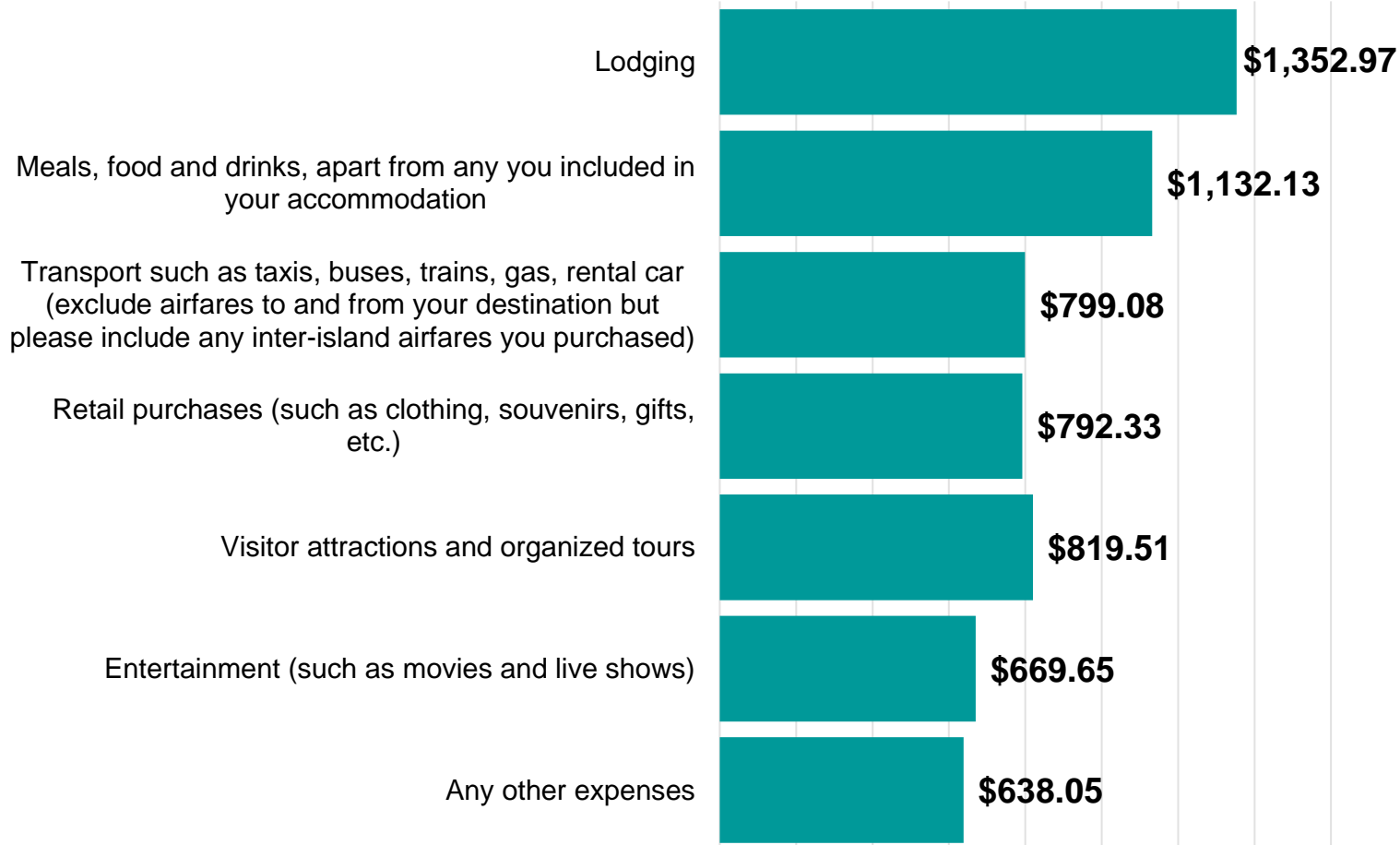
Distance Travelled on Annual Vacation



Sample Size: n=276

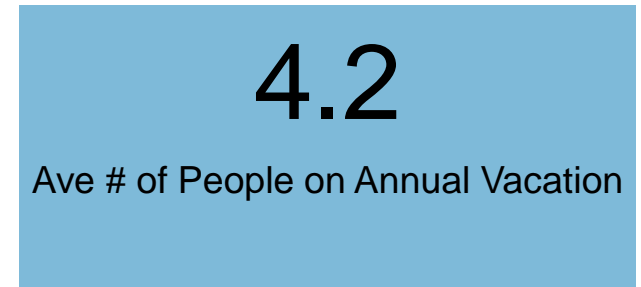
U.S. Avid Travelers \$100k+: Annual Vacation

Average Spend



Sample Size: n=276

Spend Per Person Per Day

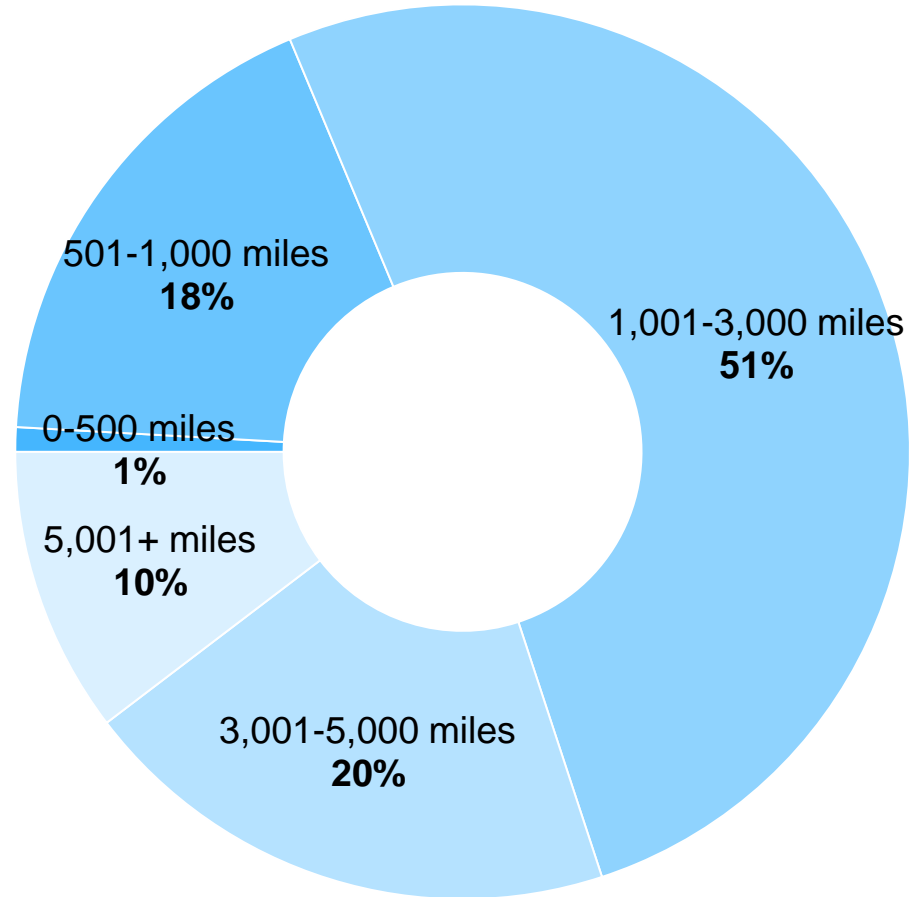


\$239.74

Ave. Per Person Per Day Spend

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

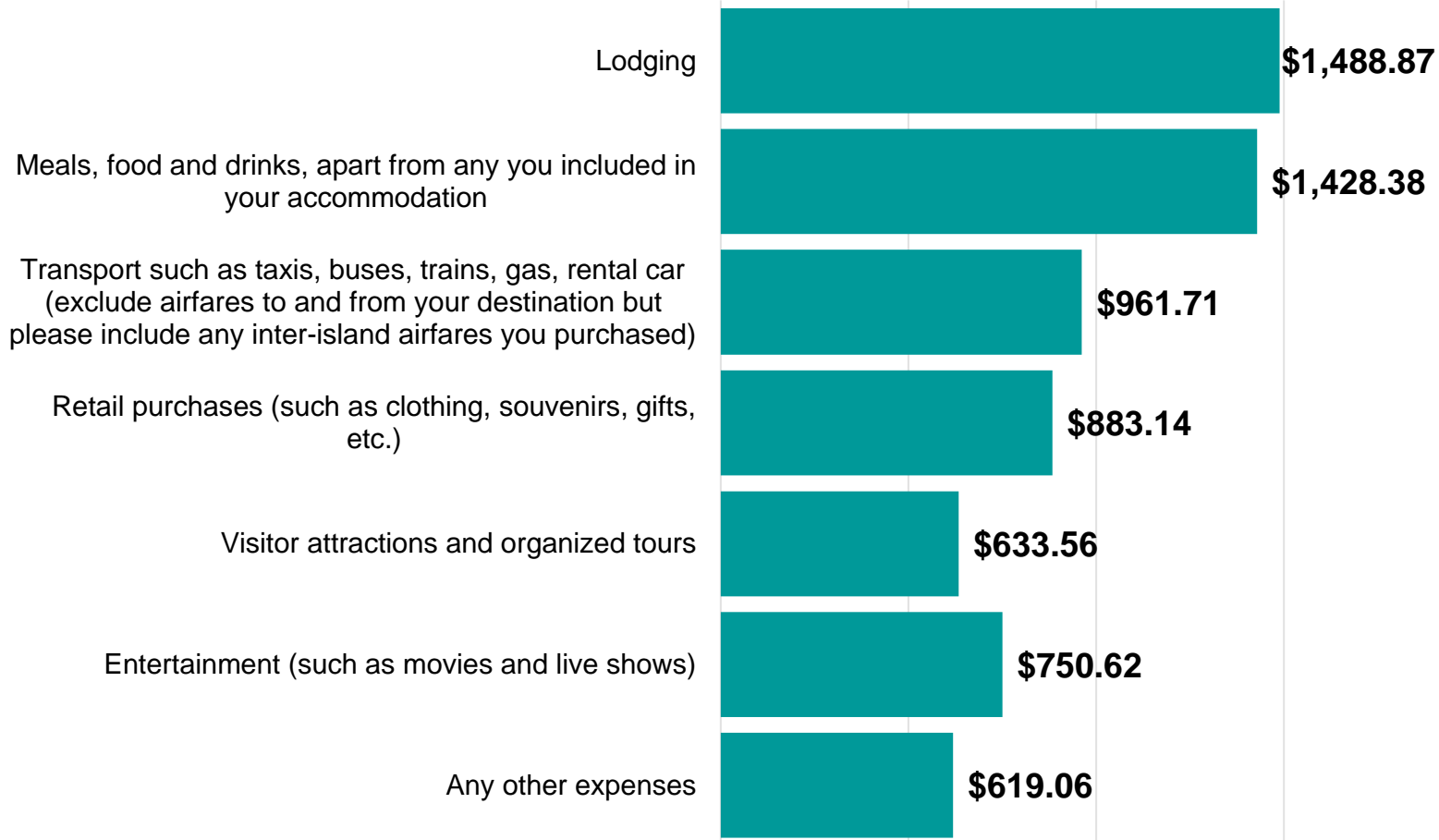
Distance Travelled on Annual Vacation



Sample Size: n=143

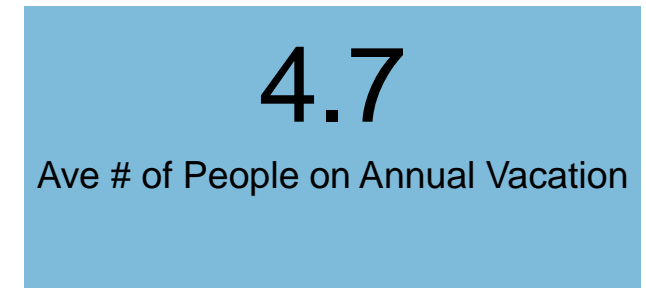
U.S. Avid Travelers \$150k+: Annual Vacation

Average Spend



Sample Size: n=143

Spend Per Person Per Day

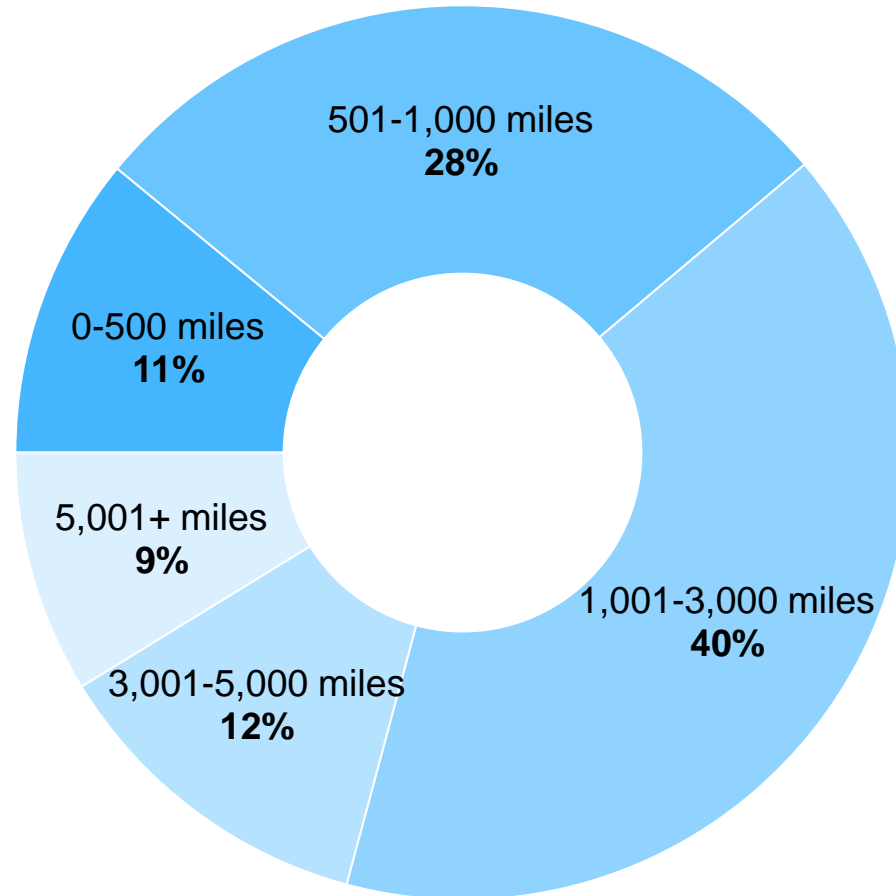


\$257.59

Ave. Per Person Per Day Spend

U.S. Long-Distance Travelers: Annual Vacation

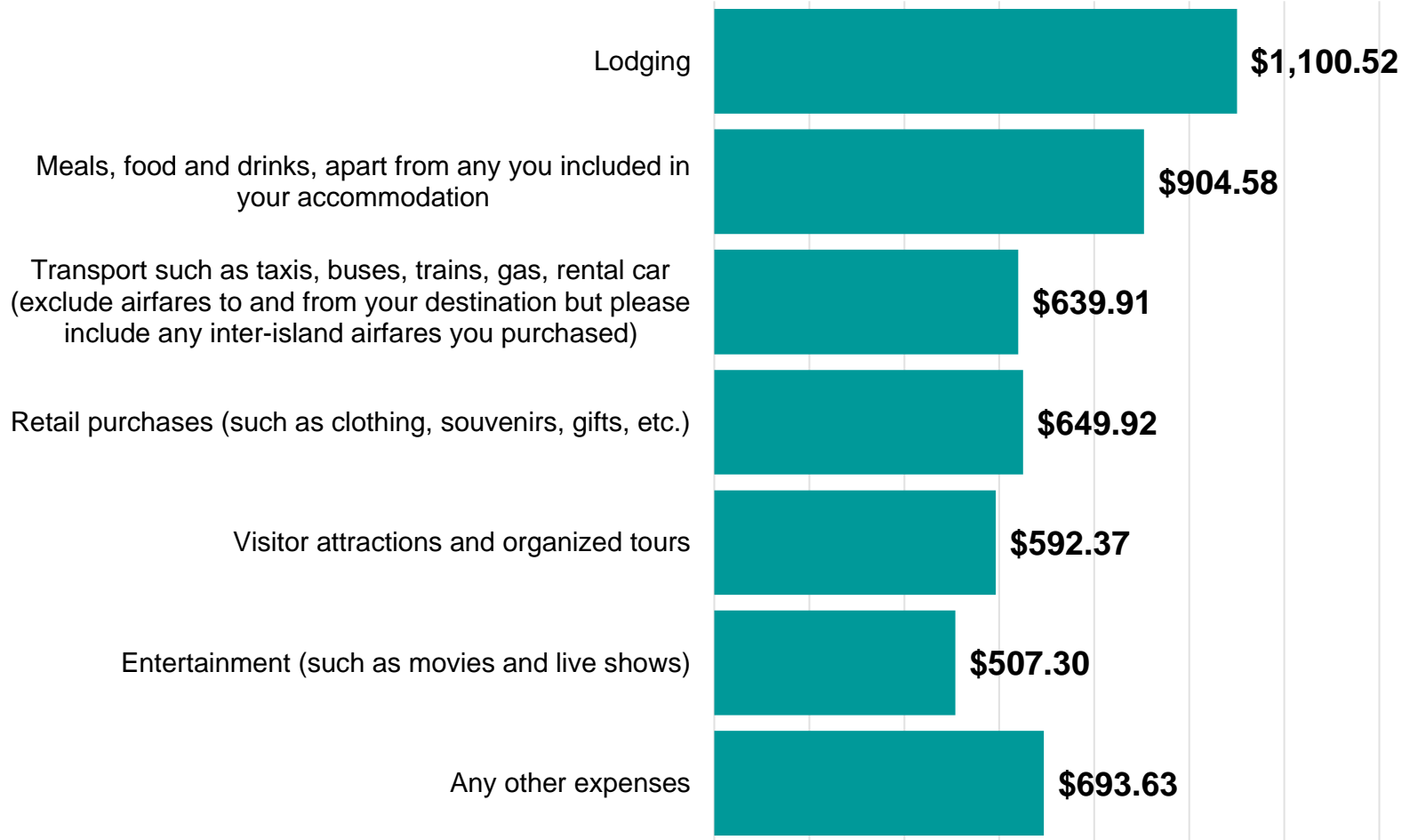
Distance Travelled on Annual Vacation



Sample Size: n=507

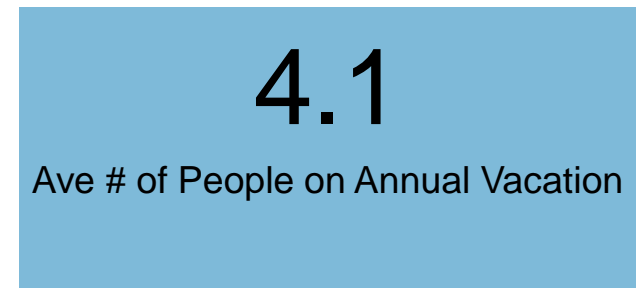
U.S. Long-Distance Travelers: Annual Vacation

Average Spend



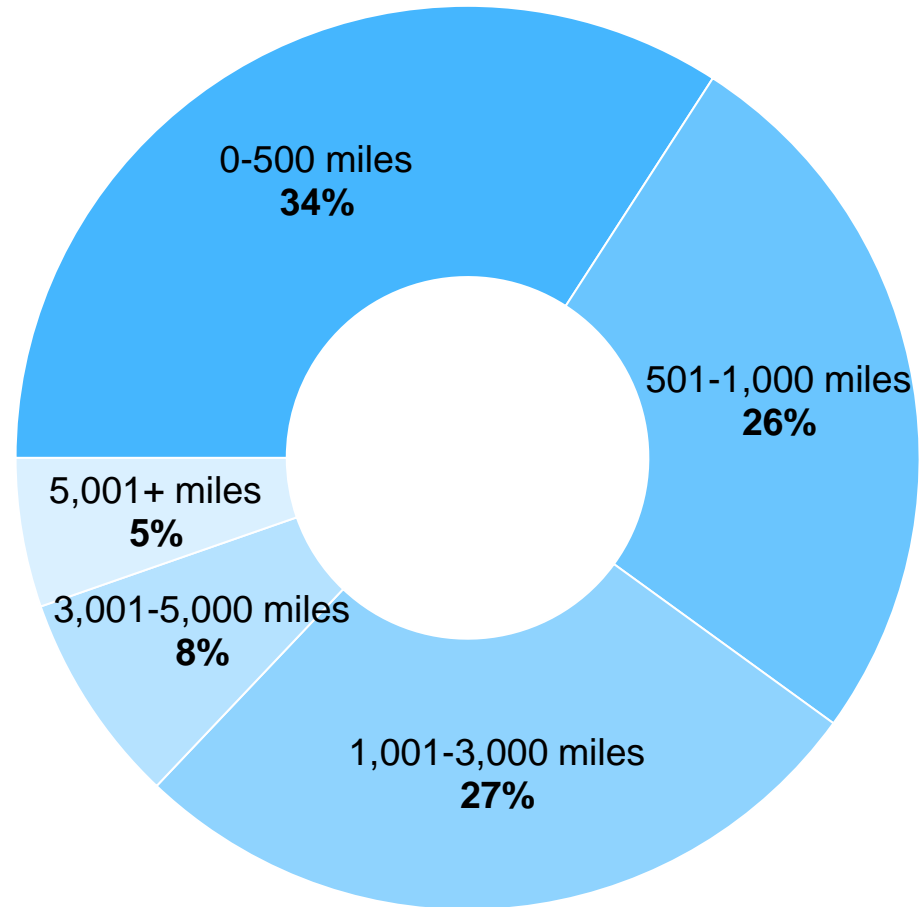
Sample Size: n=507

Spend Per Person Per Day



U.S. Nat Rep: Annual Vacation

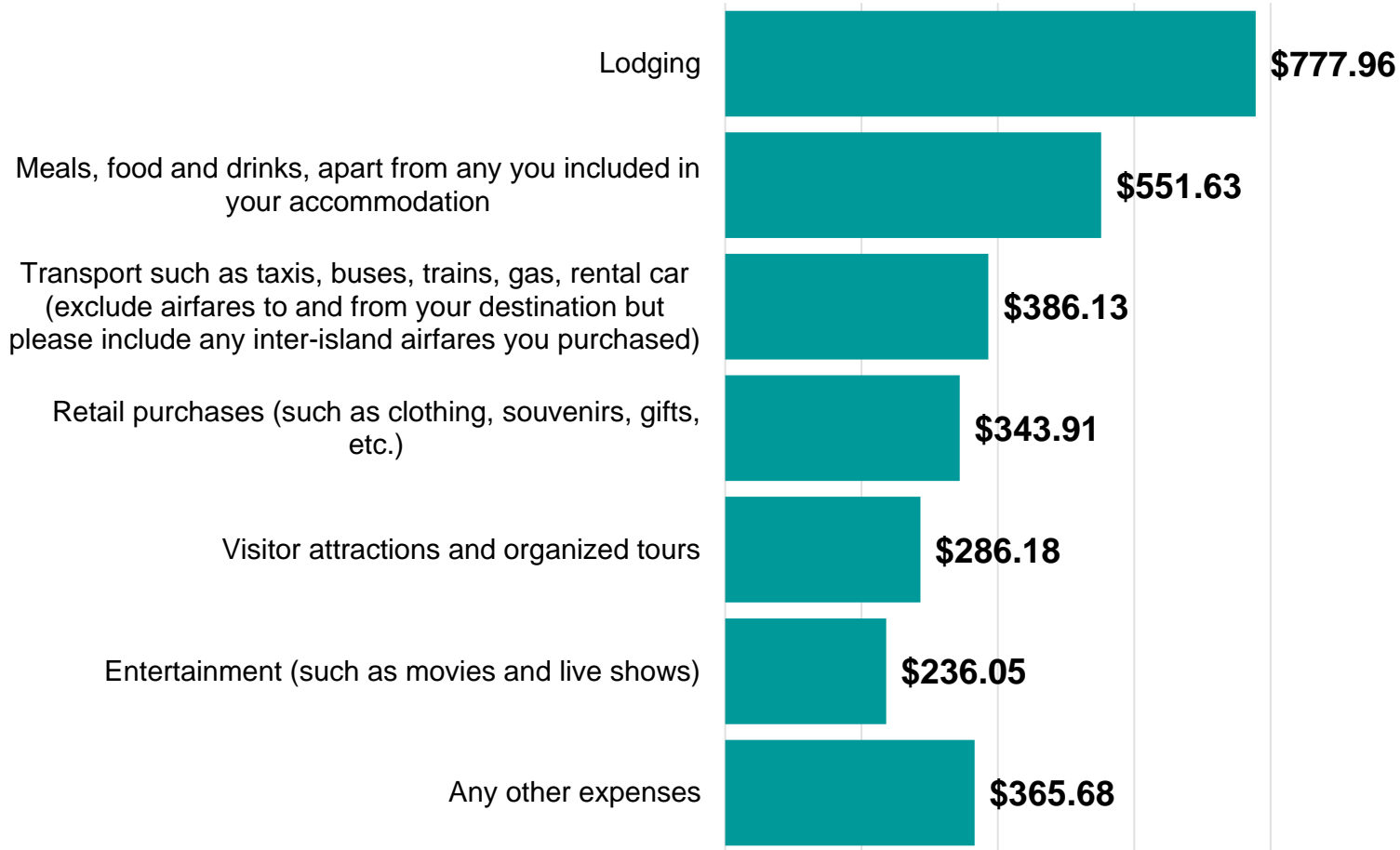
Distance Travelled on Annual Vacation



Sample Size: n=1,902

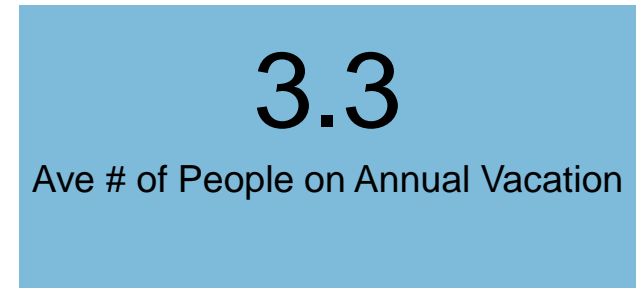
U.S. Nat Rep: Annual Vacation

Average Spend



Sample Size: n=1,902

Spend Per Person Per Day



\$160.54

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	56%	60%	52%	54%
Value for money	52%	54%	49%	56%
Entertainment and nightlife	42%	50%	41%	29%
Consideration of sustainable principles	38%	40%	37%	26%
Natural attractions/activities	50%	49%	49%	45%
Cultural attractions	49%	55%	45%	38%
Opportunity to experience local restaurants/businesses	48%	54%	46%	42%
Family-friendly location and activities	53%	53%	49%	44%
Safe and Secure Destination	59%	59%	57%	64%

Sample Size:

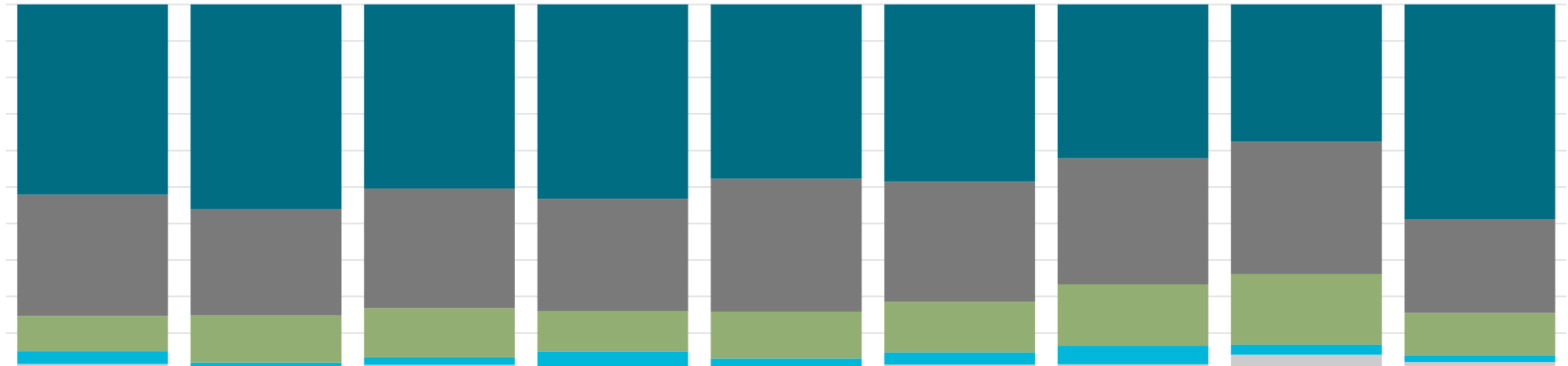
n=276

n=143

n=507

n=1,902

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

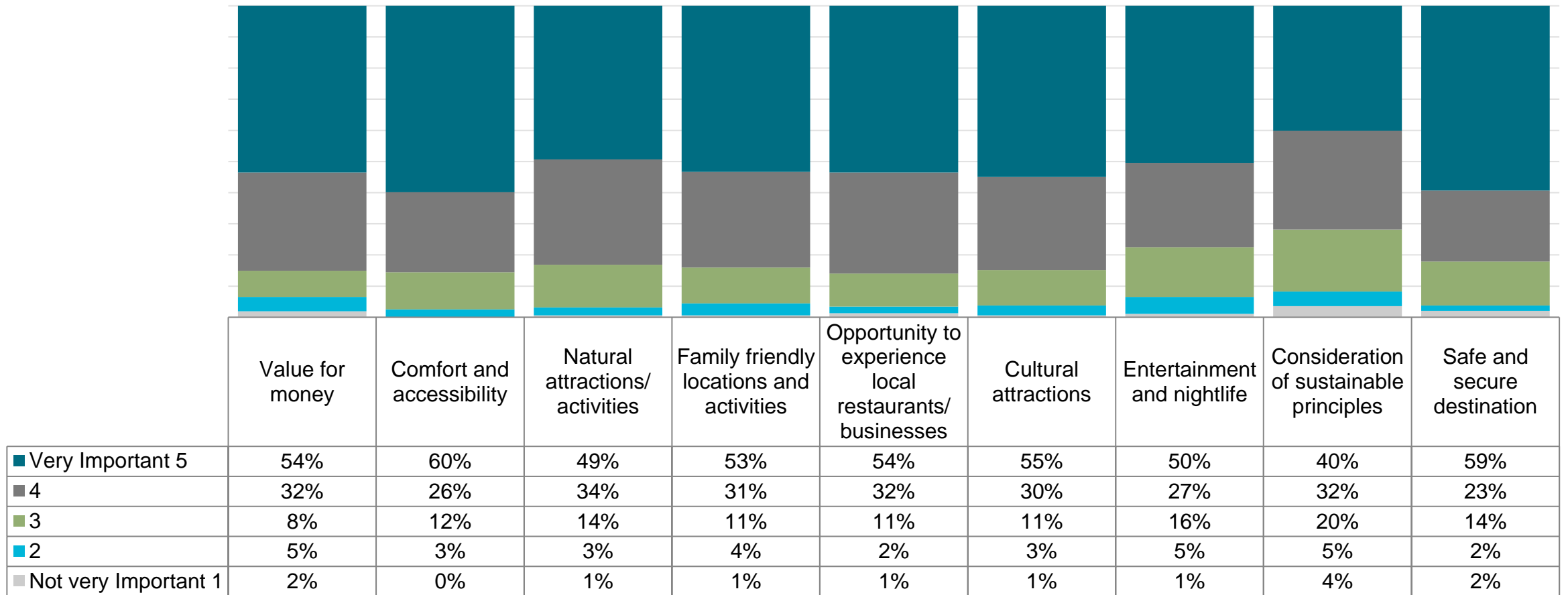


	Value for money	Comfort and accessibility	Natural attractions/activities	Family friendly locations and activities	Opportunity to experience local restaurants/businesses	Cultural attractions	Entertainment and nightlife	Consideration of sustainable principles	Safe and secure destination
Very Important 5	52%	56%	50%	53%	48%	49%	42%	38%	59%
4	33%	29%	33%	31%	36%	33%	35%	36%	26%
3	10%	13%	13%	11%	13%	14%	17%	19%	12%
2	3%	2%	2%	4%	2%	3%	5%	3%	2%
Not very Important 1	1%	0%	1%	1%	1%	1%	1%	4%	2%

Not very Important 1
 2
 3
 4
 Very Important 5

Sample Size: n=276

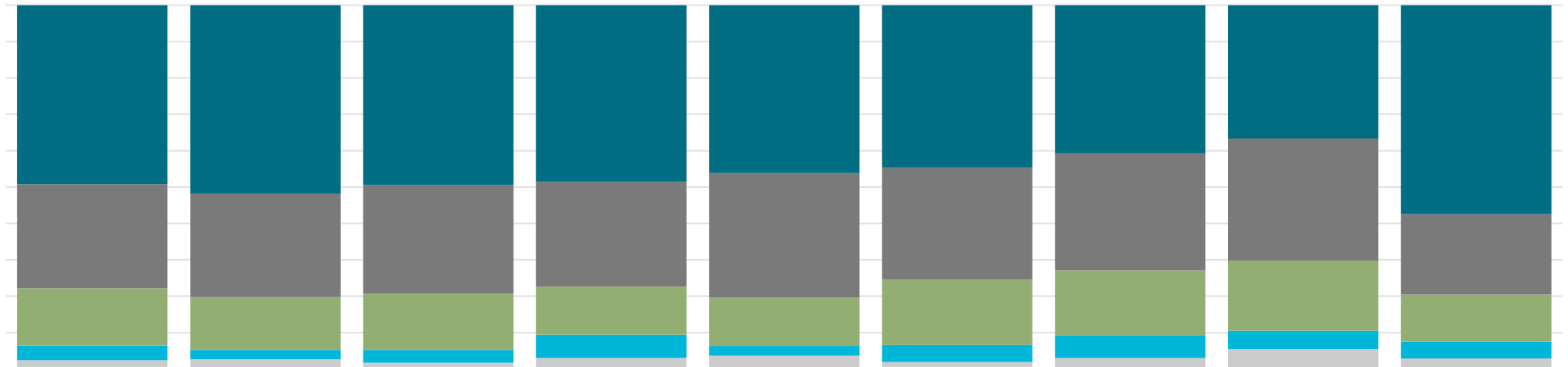
U.S. Avid Travelers \$150k+: Importance of Travel Factors



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

Sample Size: n=143

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

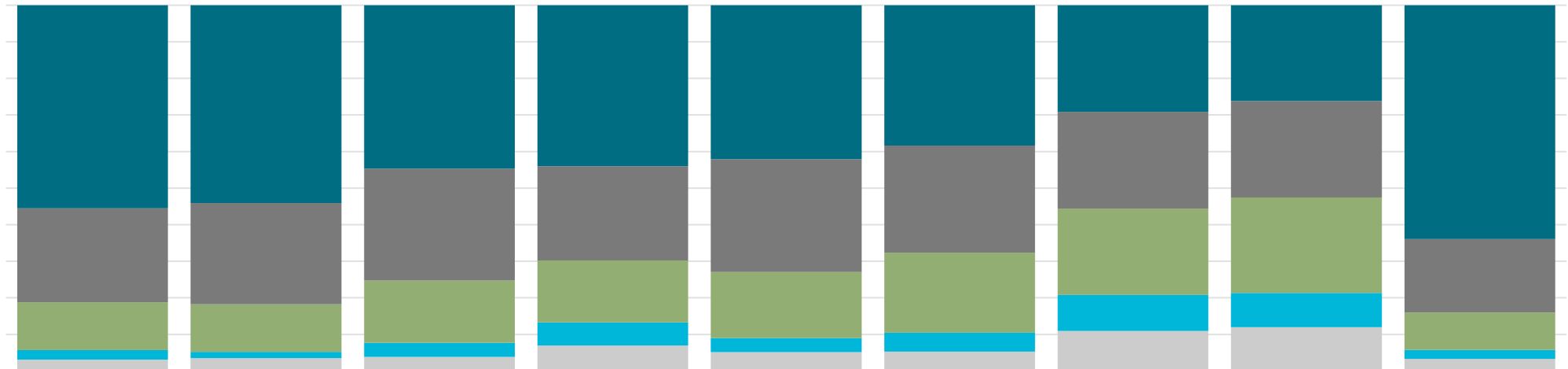


	Value for money	Comfort and accessibility	Natural attractions/activities	Family friendly locations and activities	Opportunity to experience local restaurants/businesses	Cultural attractions	Entertainment and nightlife	Consideration of sustainable principles	Safe and secure destination
Very Important 5	49%	52%	49%	49%	46%	45%	41%	37%	57%
4	29%	28%	30%	29%	34%	31%	32%	34%	22%
3	16%	15%	15%	13%	13%	18%	18%	19%	13%
2	4%	3%	4%	6%	3%	5%	6%	5%	5%
Not very Important 1	2%	3%	2%	3%	4%	2%	3%	5%	3%

Not very Important 1
 2
 3
 4
 Very Important 5

Sample Size: n=507

U.S. Nat Rep: Importance of Travel Factors



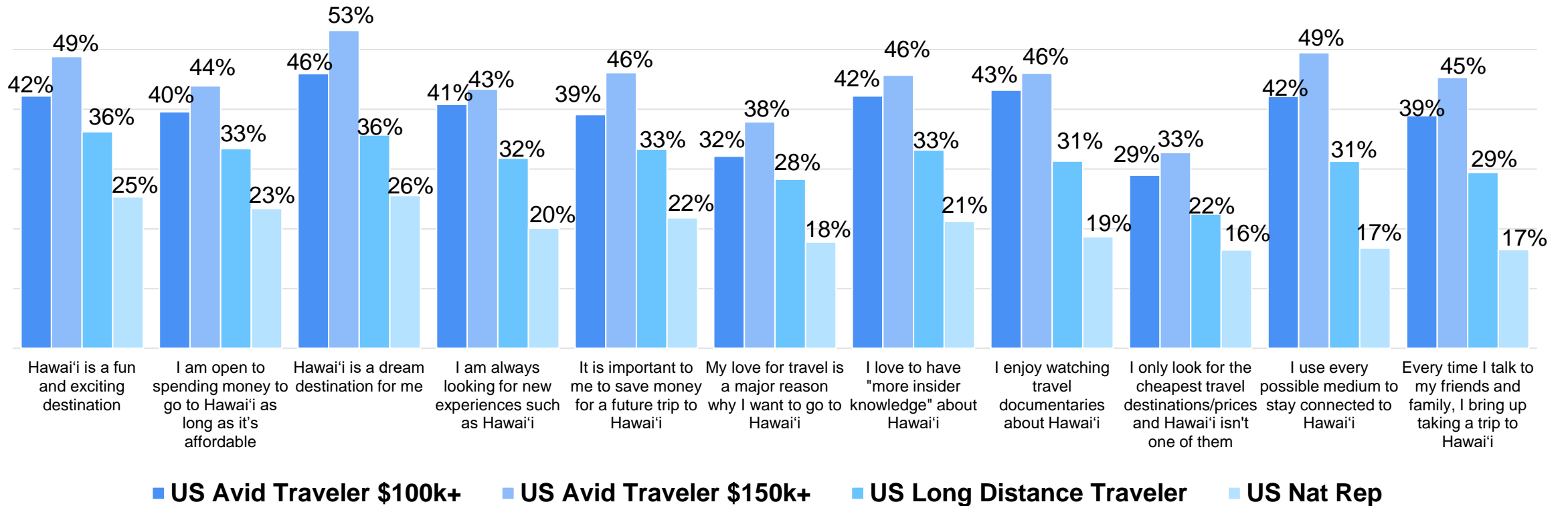
	Value for money	Comfort and accessibility	Natural attractions/activities	Family friendly locations and activities	Opportunity to experience local restaurants/businesses	Cultural attractions	Entertainment and nightlife	Consideration of sustainable principles	Safe and secure destination
Very Important 5	56%	54%	45%	44%	42%	38%	29%	26%	64%
4	26%	28%	31%	26%	31%	29%	26%	26%	20%
3	13%	13%	17%	17%	18%	22%	24%	26%	10%
2	3%	2%	4%	6%	4%	5%	10%	9%	2%
Not very Important 1	3%	3%	4%	7%	5%	5%	11%	12%	3%

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

Sample Size: n=1,902

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

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



Sample Size:

n=276

n=143

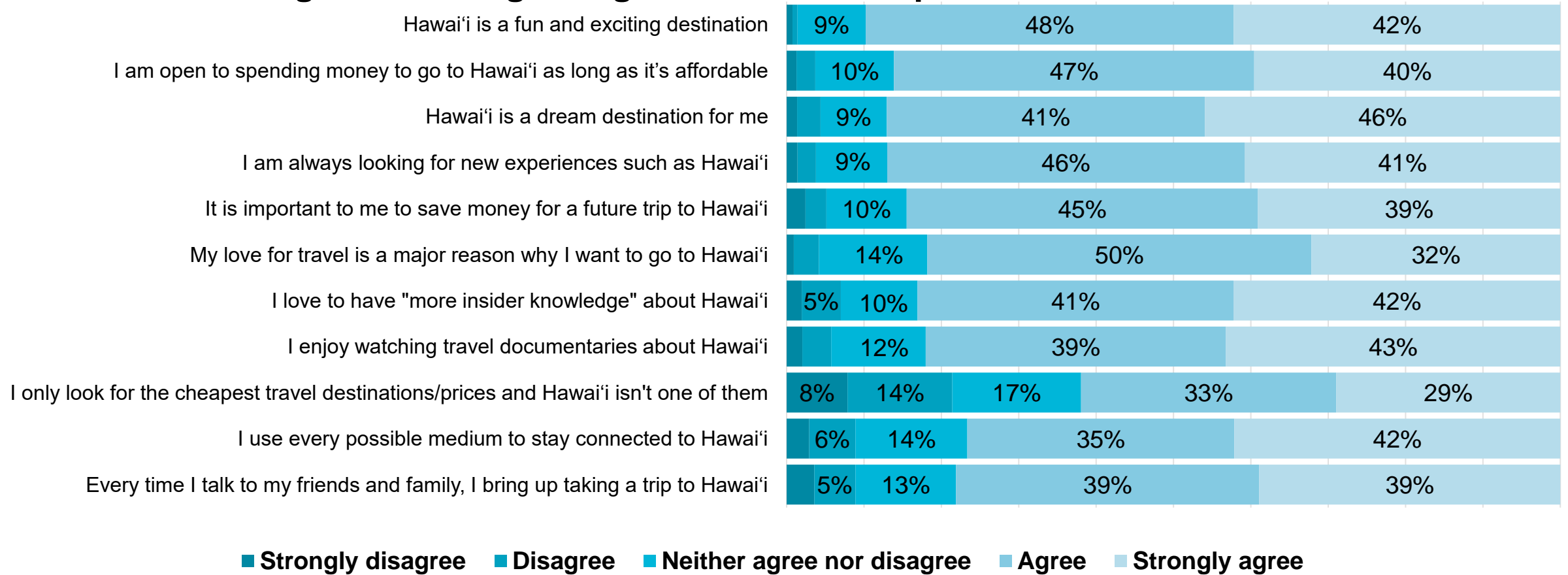
n=507

n=1,902

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

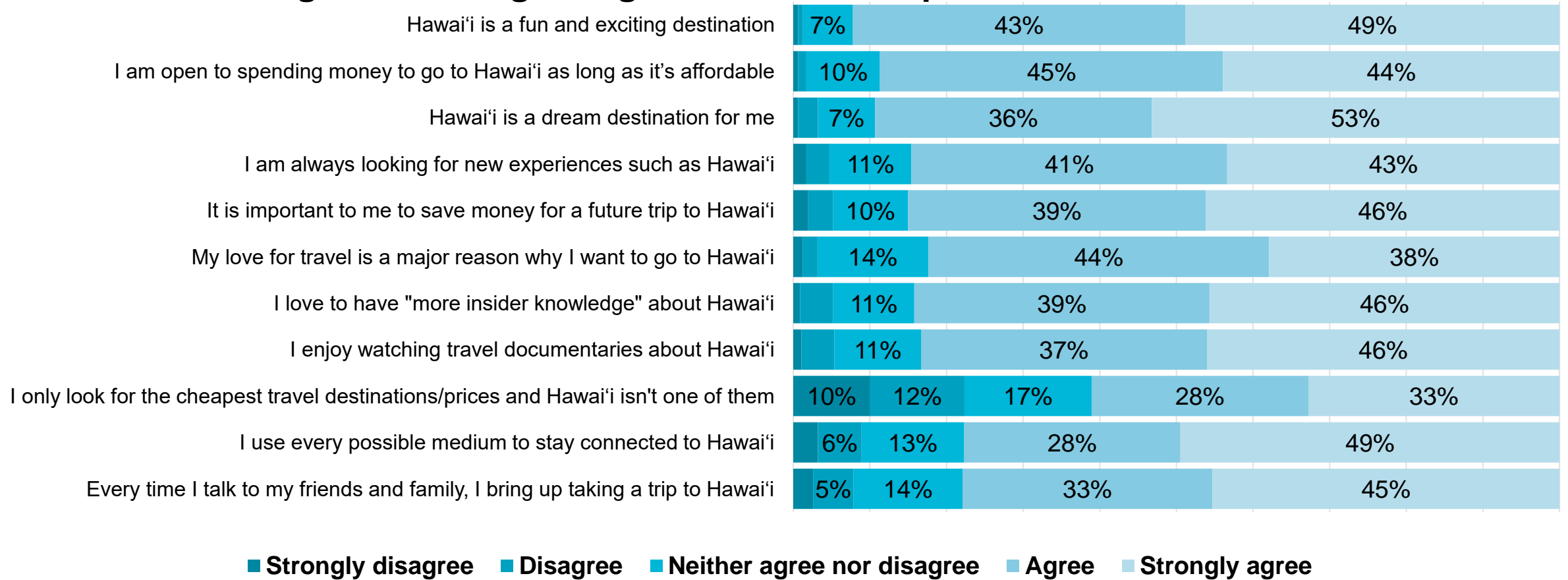
Agreement Regarding Hawai'i as an Aspirational Destination



Sample Size: n=276

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

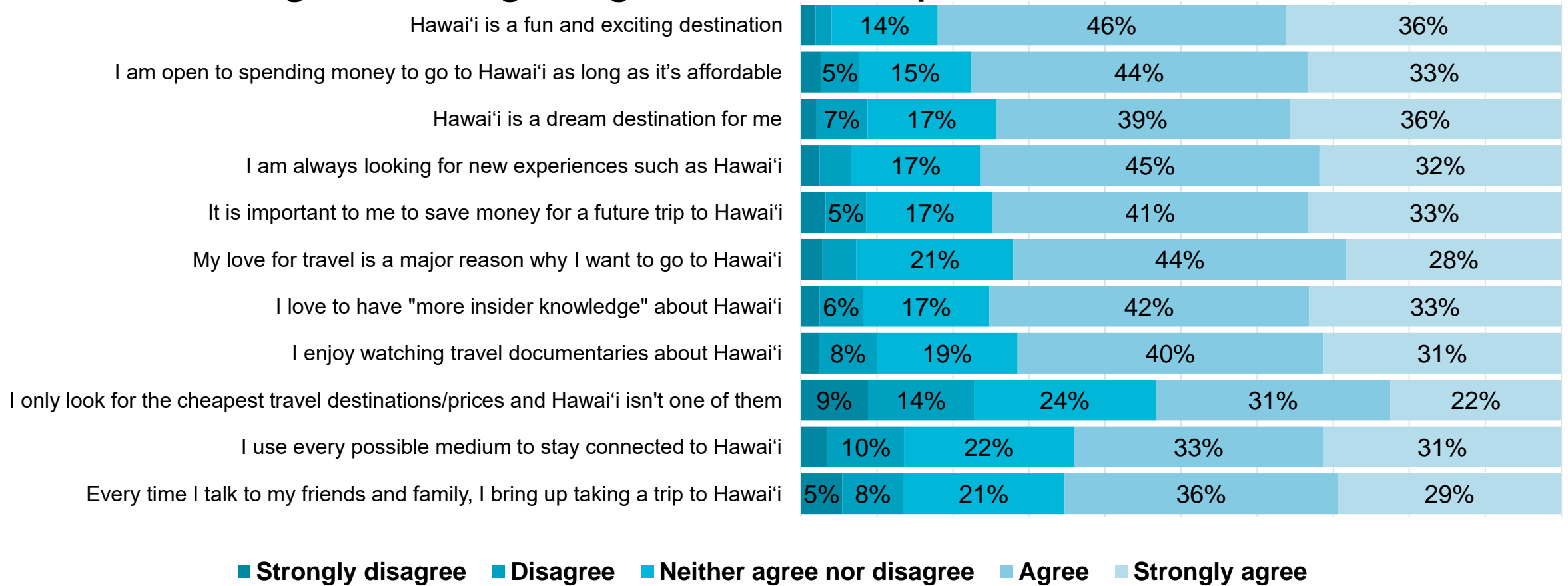
Agreement Regarding Hawai'i as an Aspirational Destination



Sample Size: n=143

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

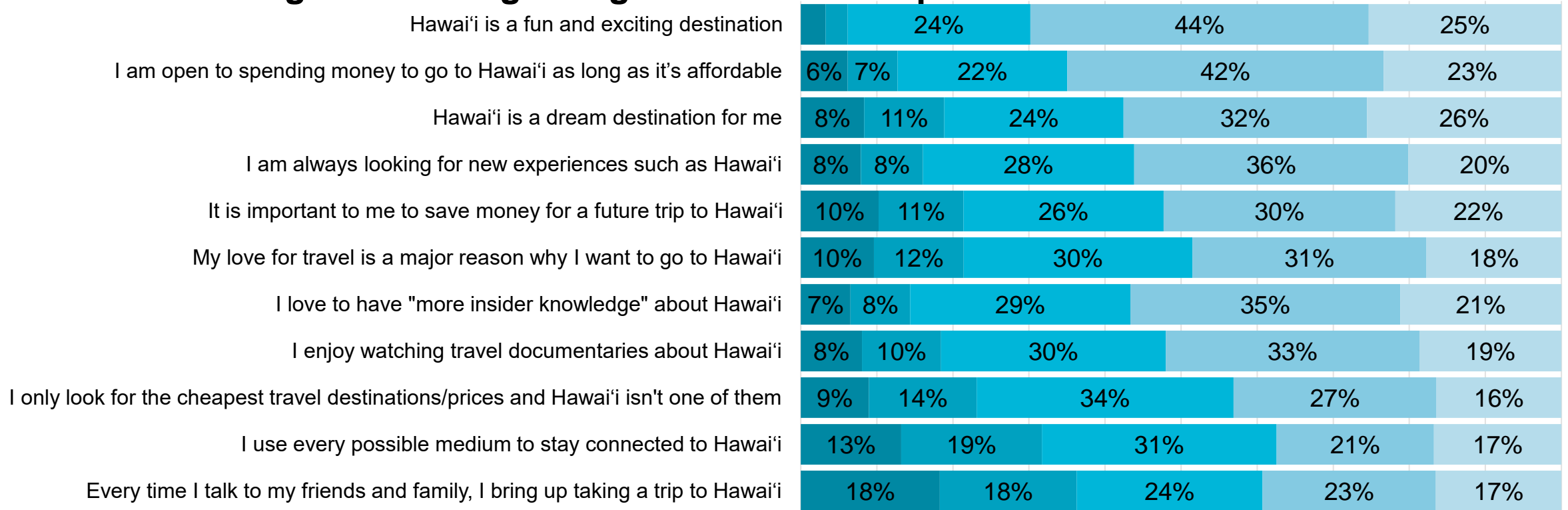
Agreement Regarding Hawai'i as an Aspirational Destination



Sample Size: n=507

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

Agreement Regarding Hawai'i as an Aspirational Destination

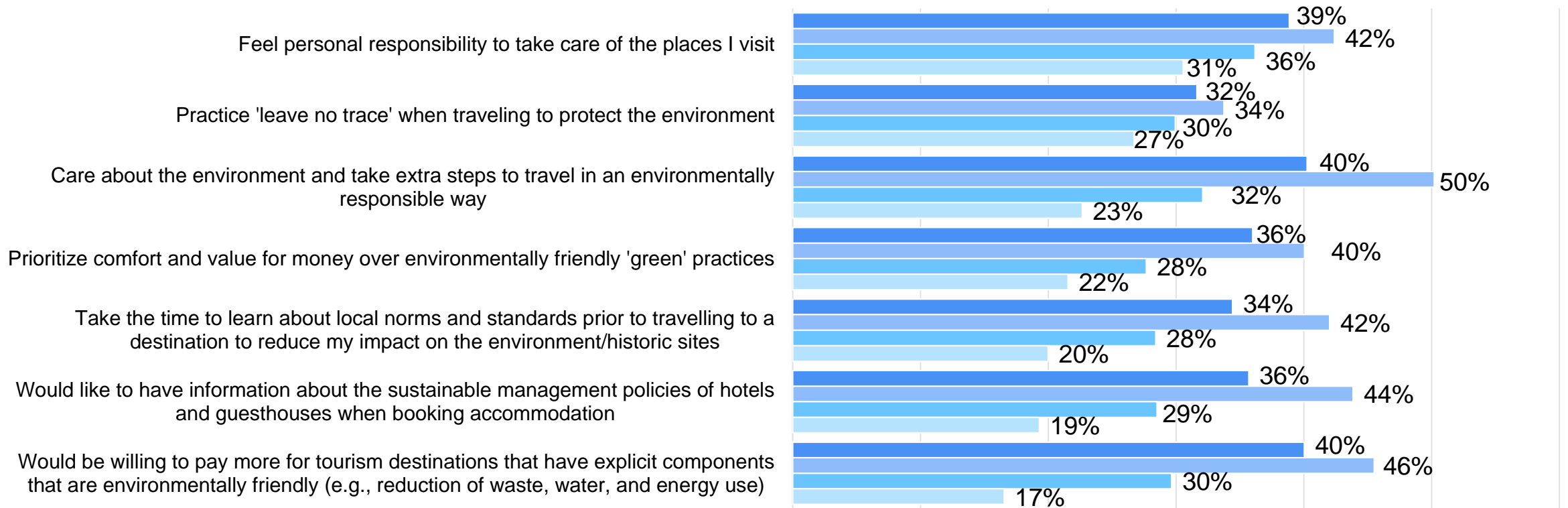


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=1,902

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=276

n=143

n=507

n=1,902

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=276

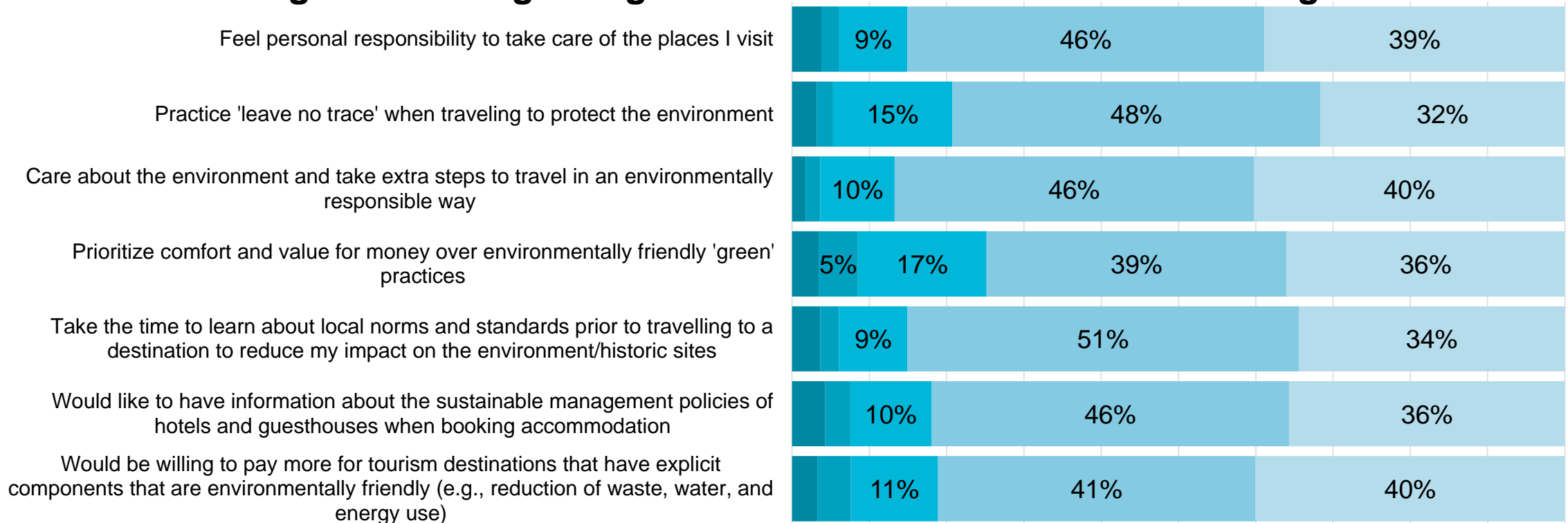
n=143

n=507

n=1,902

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

Agreement Regarding Sustainable Practices While Traveling

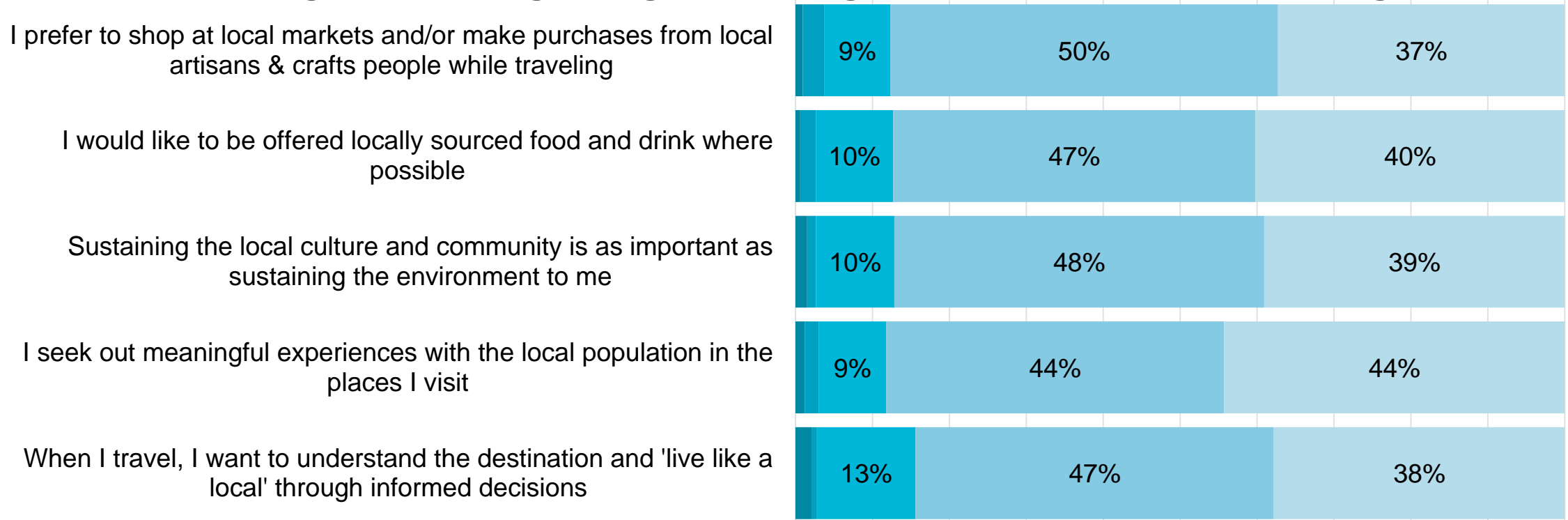


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=276

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

Agreement Regarding Sustaining Local Culture While Traveling

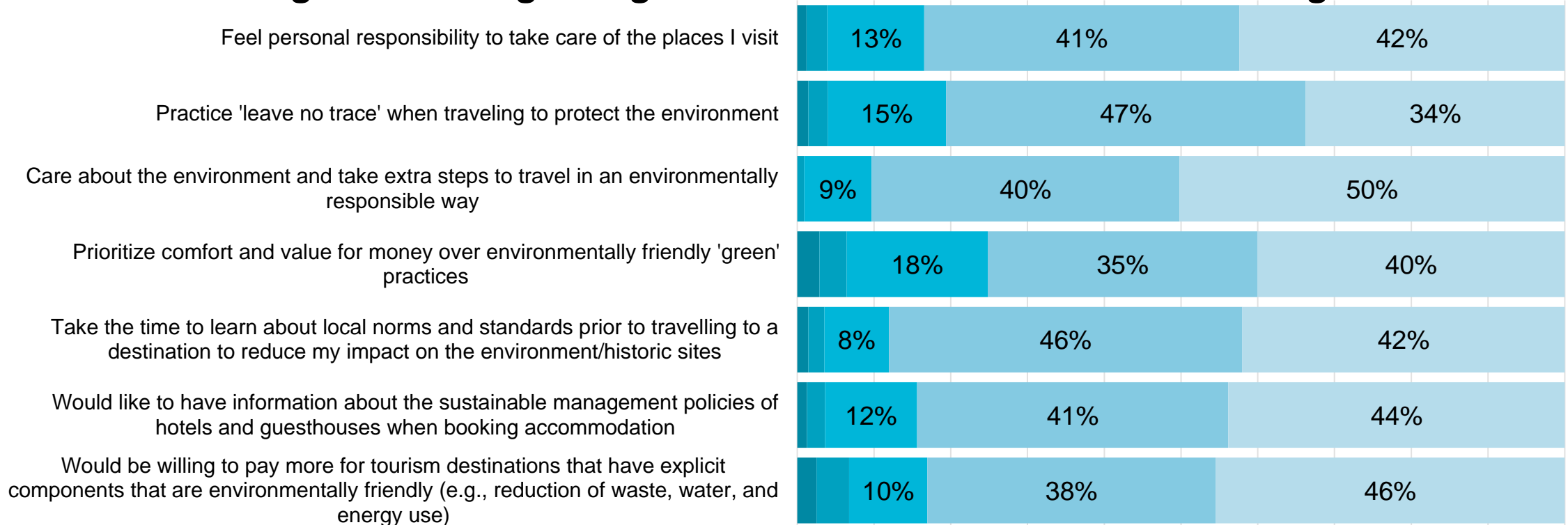


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=276

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

Agreement Regarding Sustainable Practices While Traveling

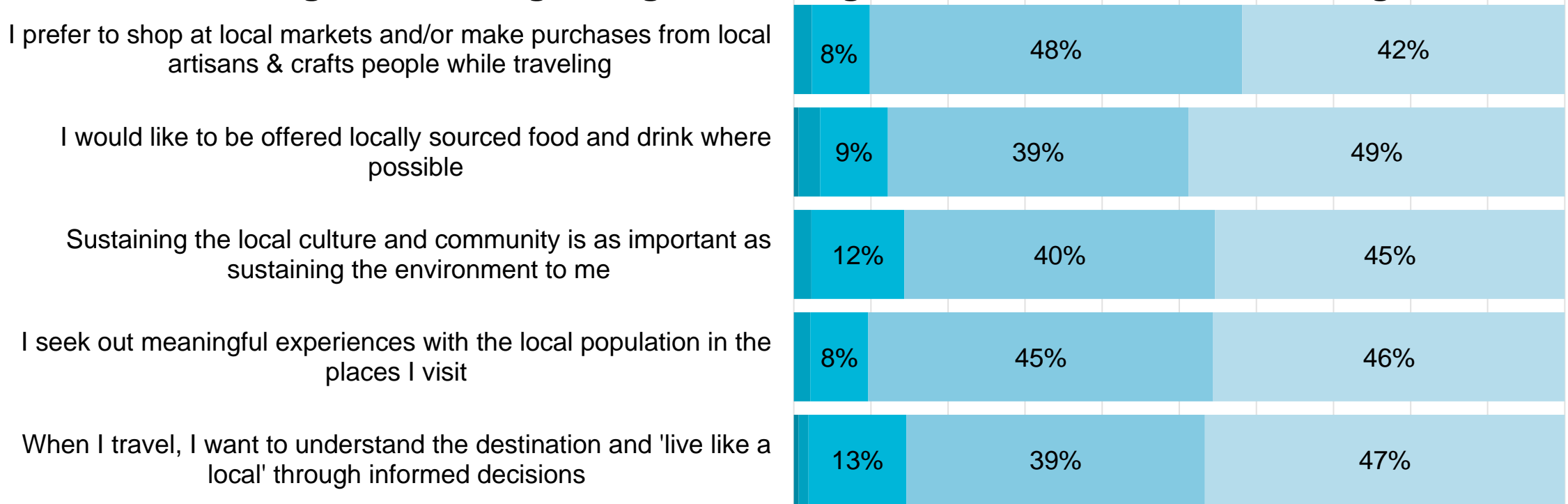


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=143

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

Agreement Regarding Sustaining Local Culture While Traveling

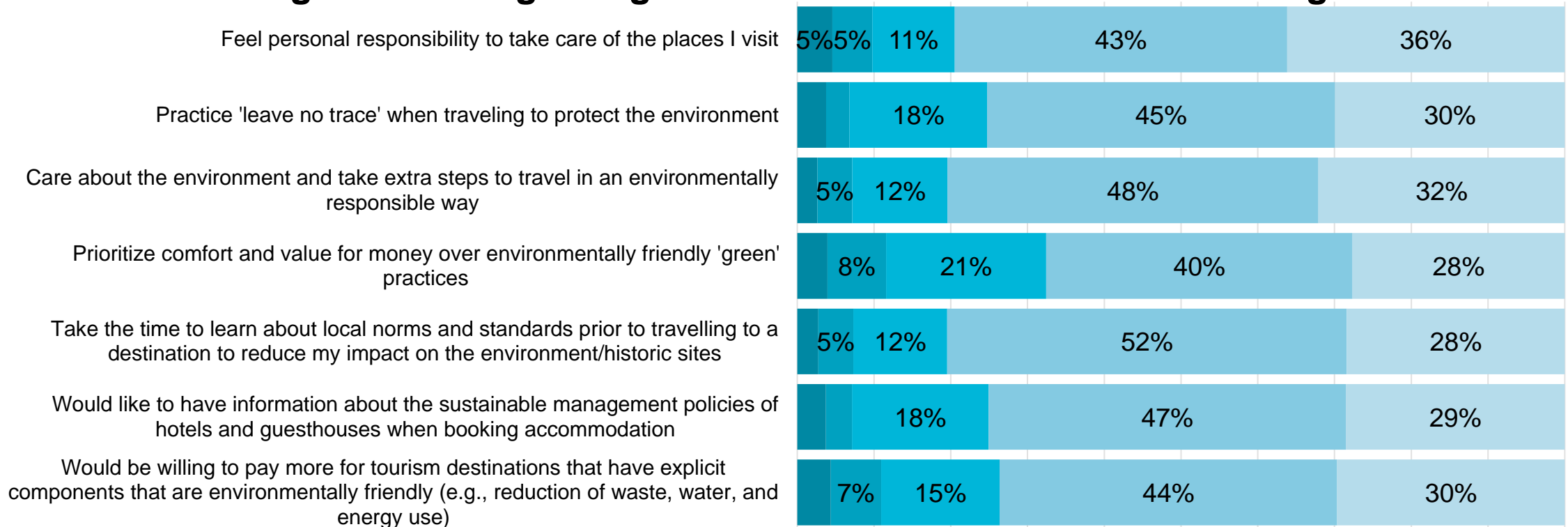


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=143

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=507

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

Agreement Regarding Sustaining Local Culture While Traveling

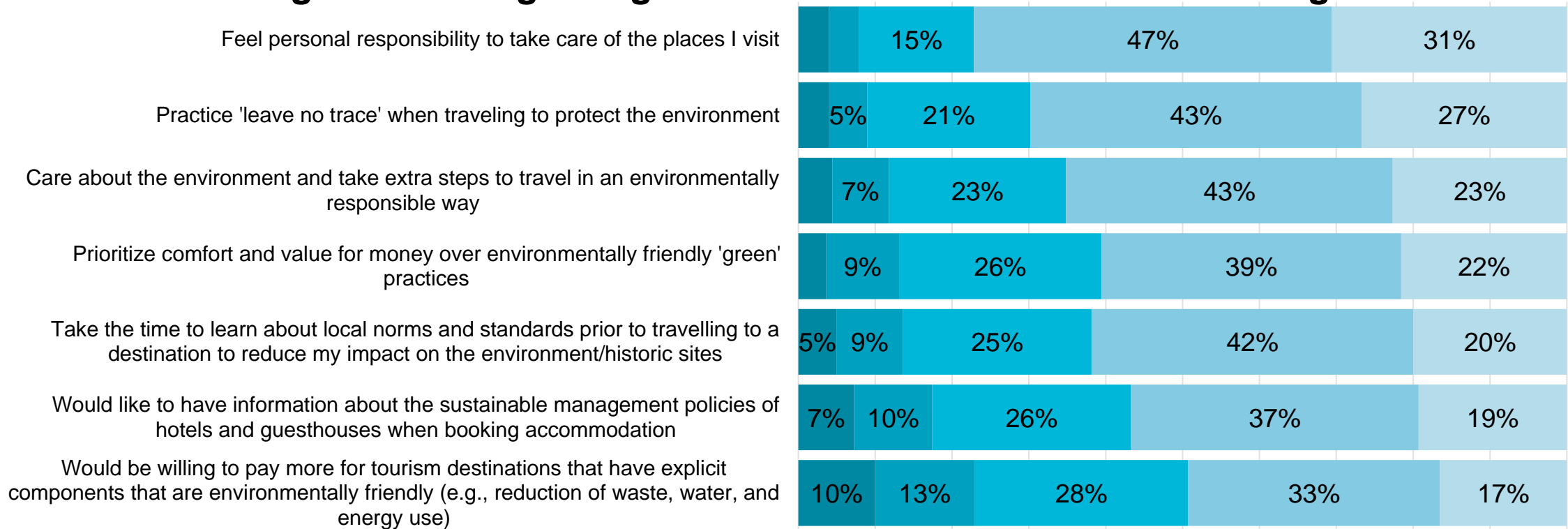


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=507

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

Agreement Regarding Sustainable Practices While Traveling

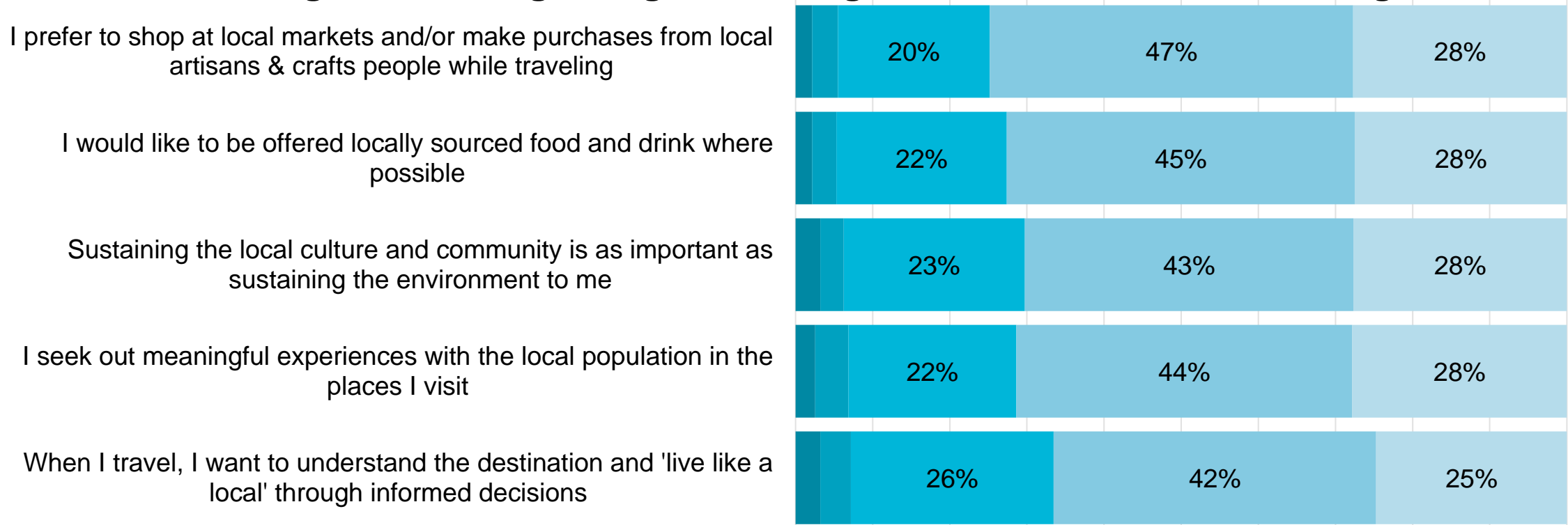


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=1,902

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

Agreement Regarding Sustaining Local Culture While Traveling

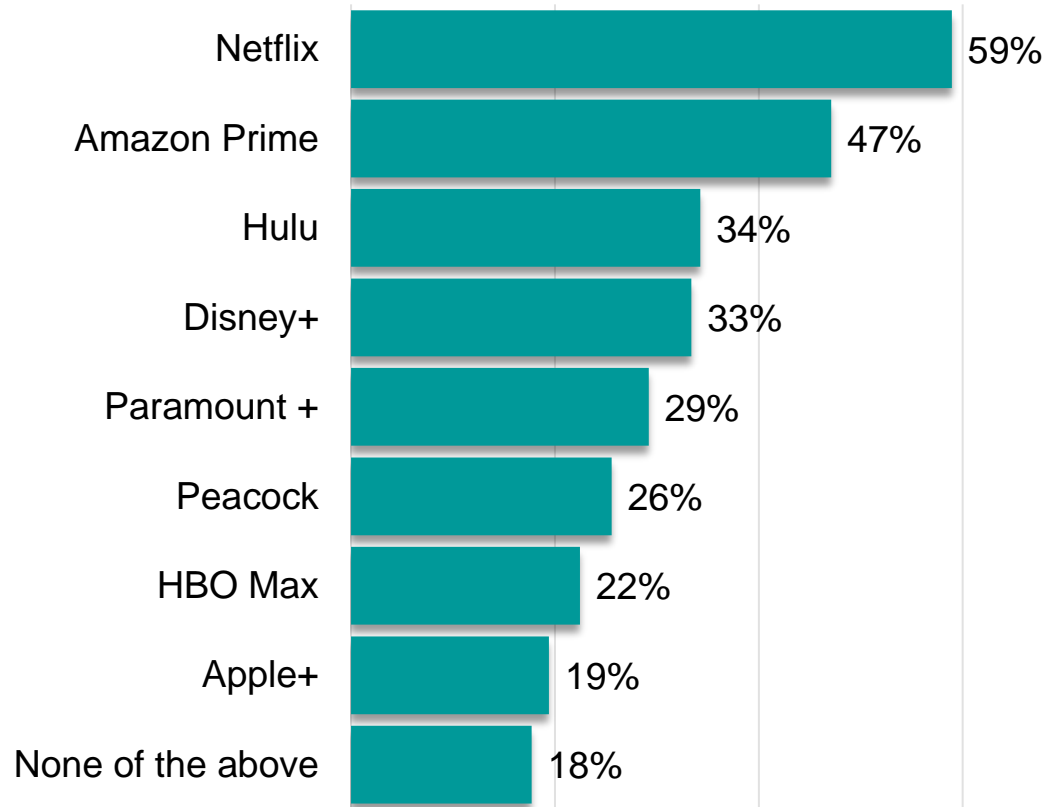


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

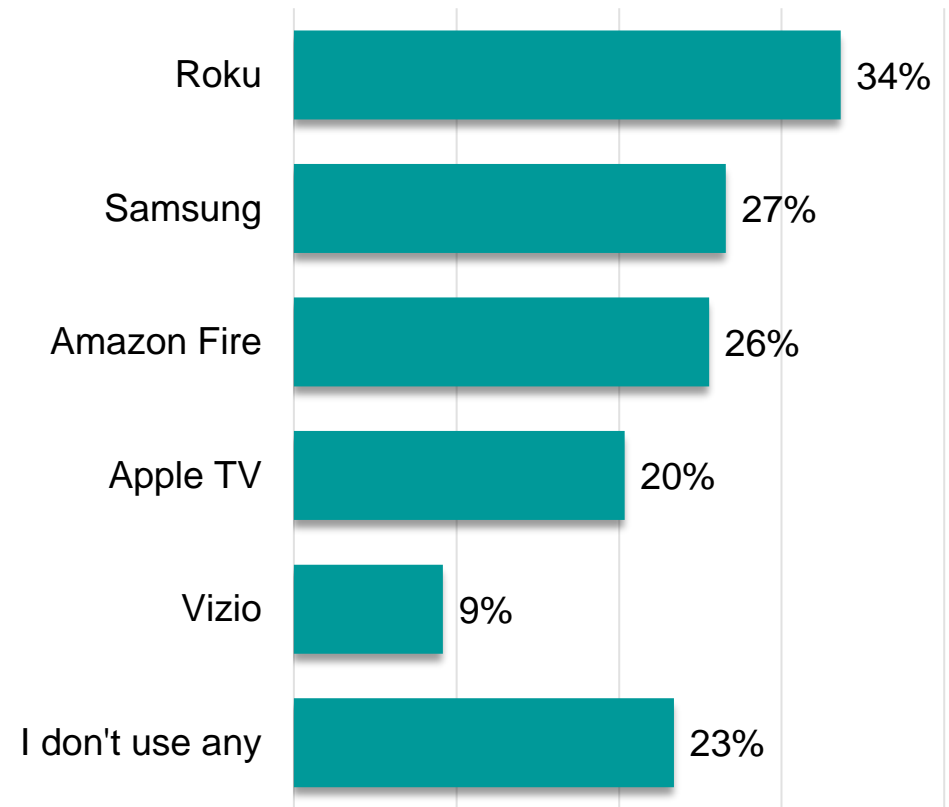
Sample Size: n=1,902

U.S. Media Consumption

Streaming Platforms Used Weekly



Connected Device Used

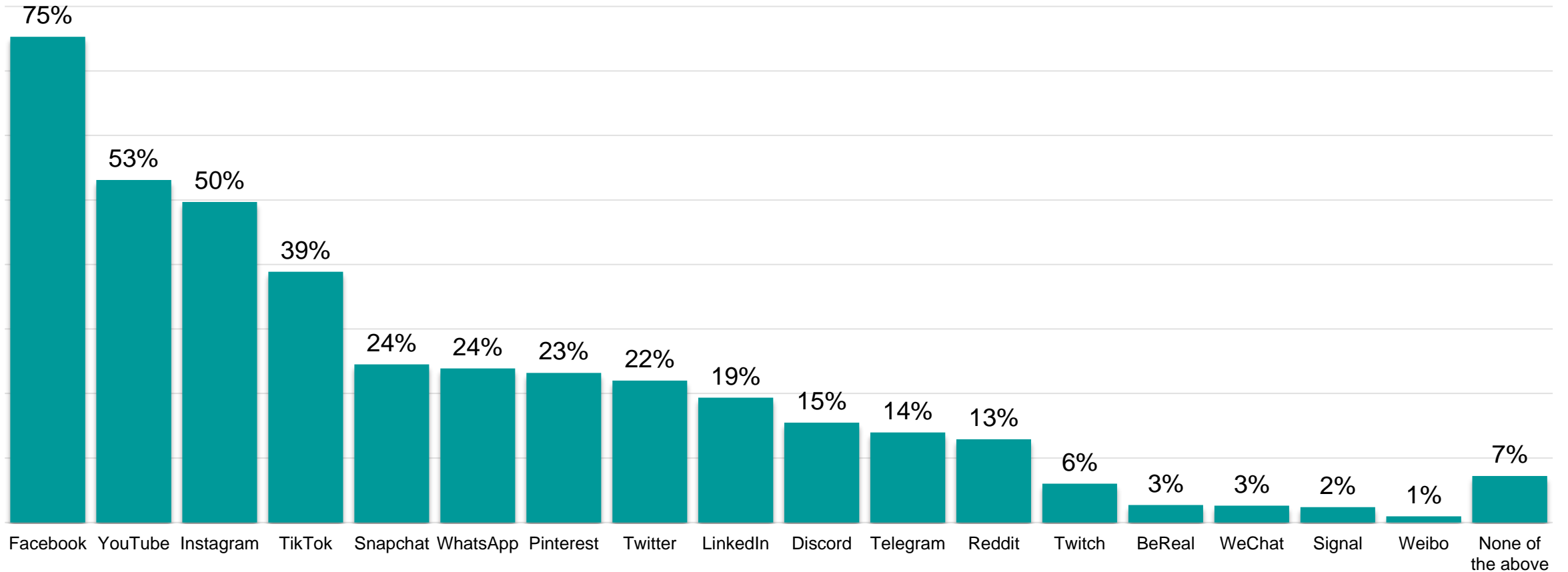


Sample Size: n=1,902

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=1,902

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	44%
Online	33%
Social Media	42%
TV commercials	28%
YouTube	33%
TV Program/Documentary	22%
Email	17%
Radio	10%
Newspaper	10%
Out of home advertising (e.g. Poster Billboards, bus shelter advertisements, etc.)	10%
I don't recall	12%

Actions Taken After Seeing an Ad for a Destination

I search for information about the destination online	45%
I talk to friends/family about the destination	34%
I go to the destination's website	33%
I look up the destination on social media	29%
I book travel to the destination almost immediately	12%
I don't do anything	17%
None of the above	8%

Sample Size: n=1,902

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**