



Vision Insights U.S. Traveler Profiles September 2025

October 29, 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

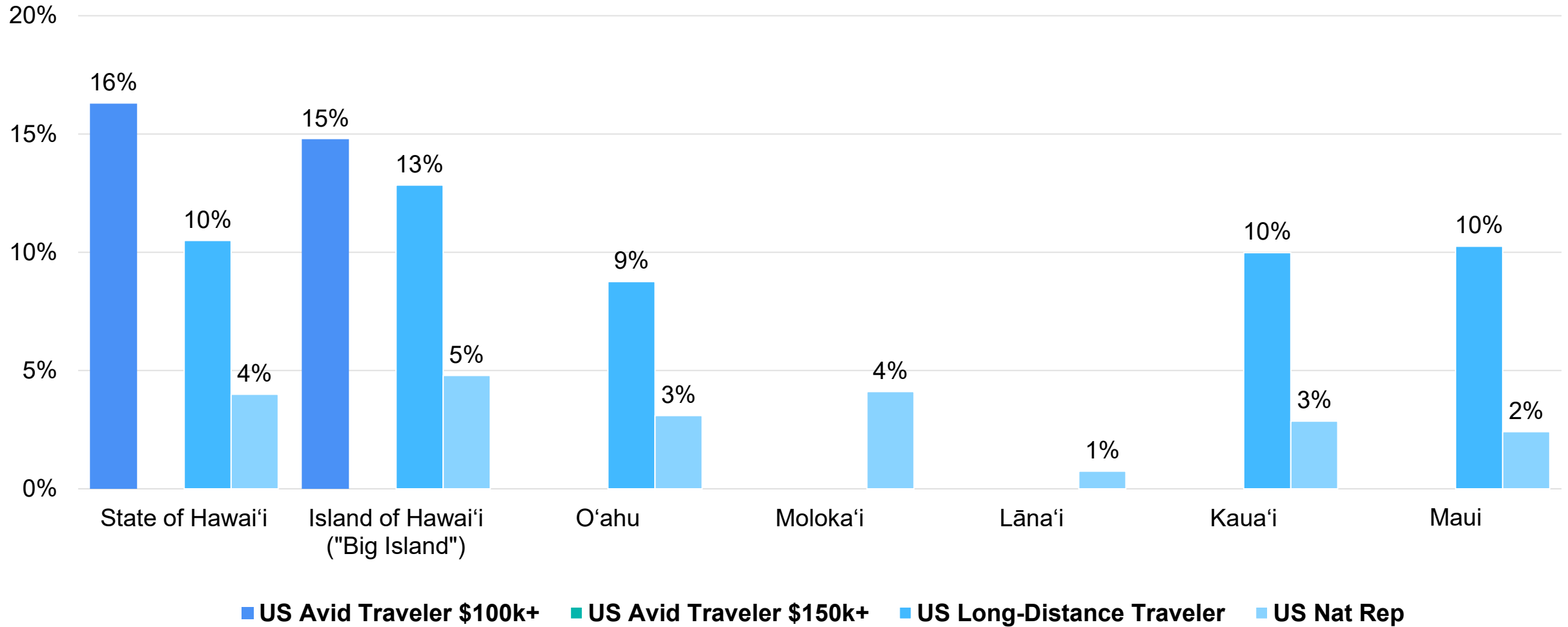
Avid Traveler \$150k+

- 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

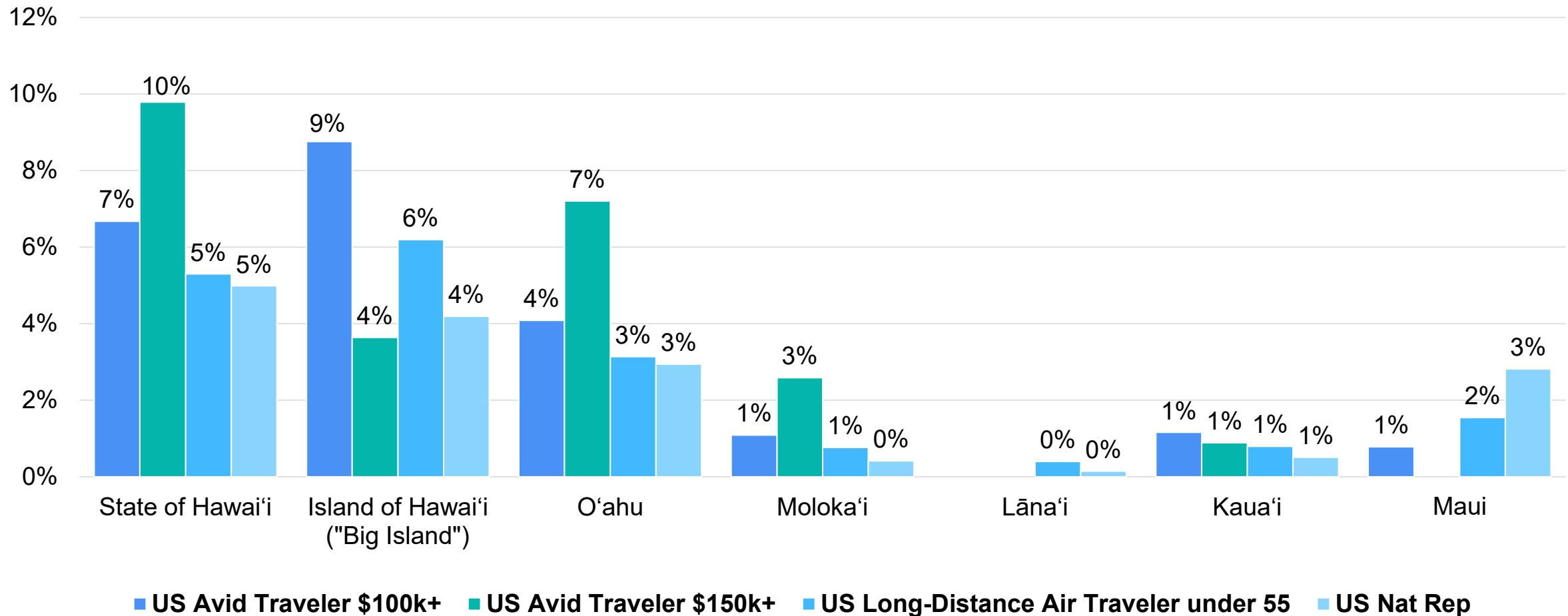
U.S. - Leisure Trip In Past 12 Months



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

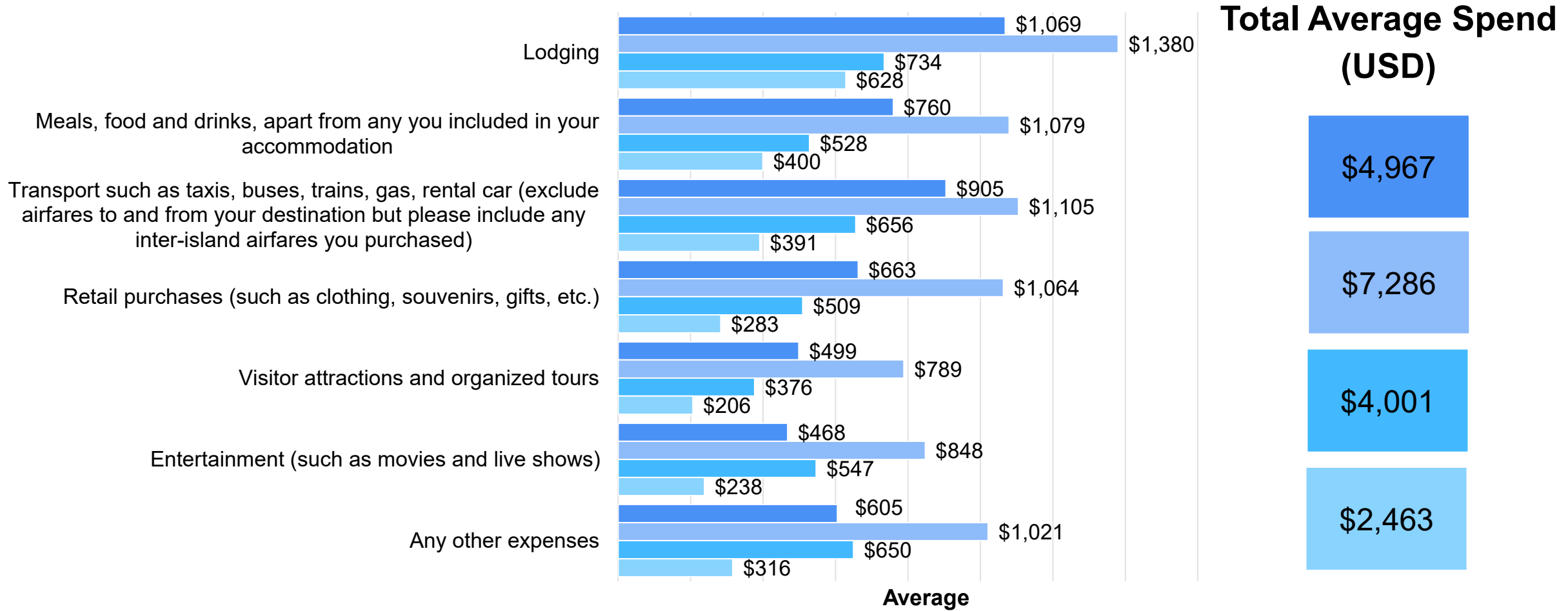


Sample Min. n=75

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	
	%		%		%		%
California	18.7%	California	19.9%	New York	12.9%	Florida	8.9%
New York	14.7%	New York	15.6%	Florida	9.8%	New York	8.4%
Florida	9.5%	Illinois	9.5%	California	9.0%	Texas	7.7%
Texas	7.6%	Virginia	8.3%	Texas	8.7%	California	6.9%
Illinois	7.2%	Texas	8.0%	Georgia	5.4%	Ohio	4.9%
Virginia	5.4%	Florida	7.6%	Virginia	4.2%	Pennsylvania	4.5%
Georgia	3.2%	New Jersey	4.3%	Illinois	3.7%	Georgia	4.3%
New Jersey	3.0%	Massachusetts	2.6%	Ohio	3.4%	North Carolina	3.9%
Louisiana	2.7%	Alabama	2.6%	New Jersey	3.3%	Illinois	3.4%
Massachusetts	2.6%	Washington	1.8%	North Carolina	3.2%	Virginia	2.7%
Sample Size:	n=149	Sample Size:	n=55	Sample Size:	n=396	Sample Size:	n=1,839

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=149

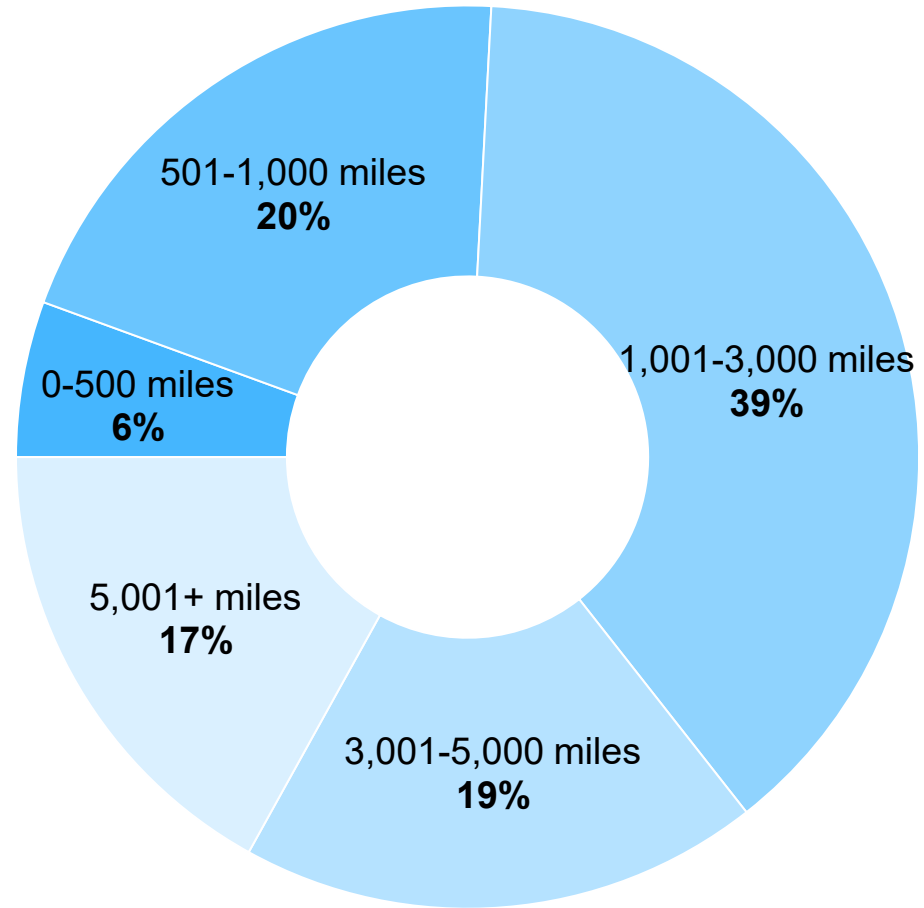
n=55

n=396

n=1,839

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

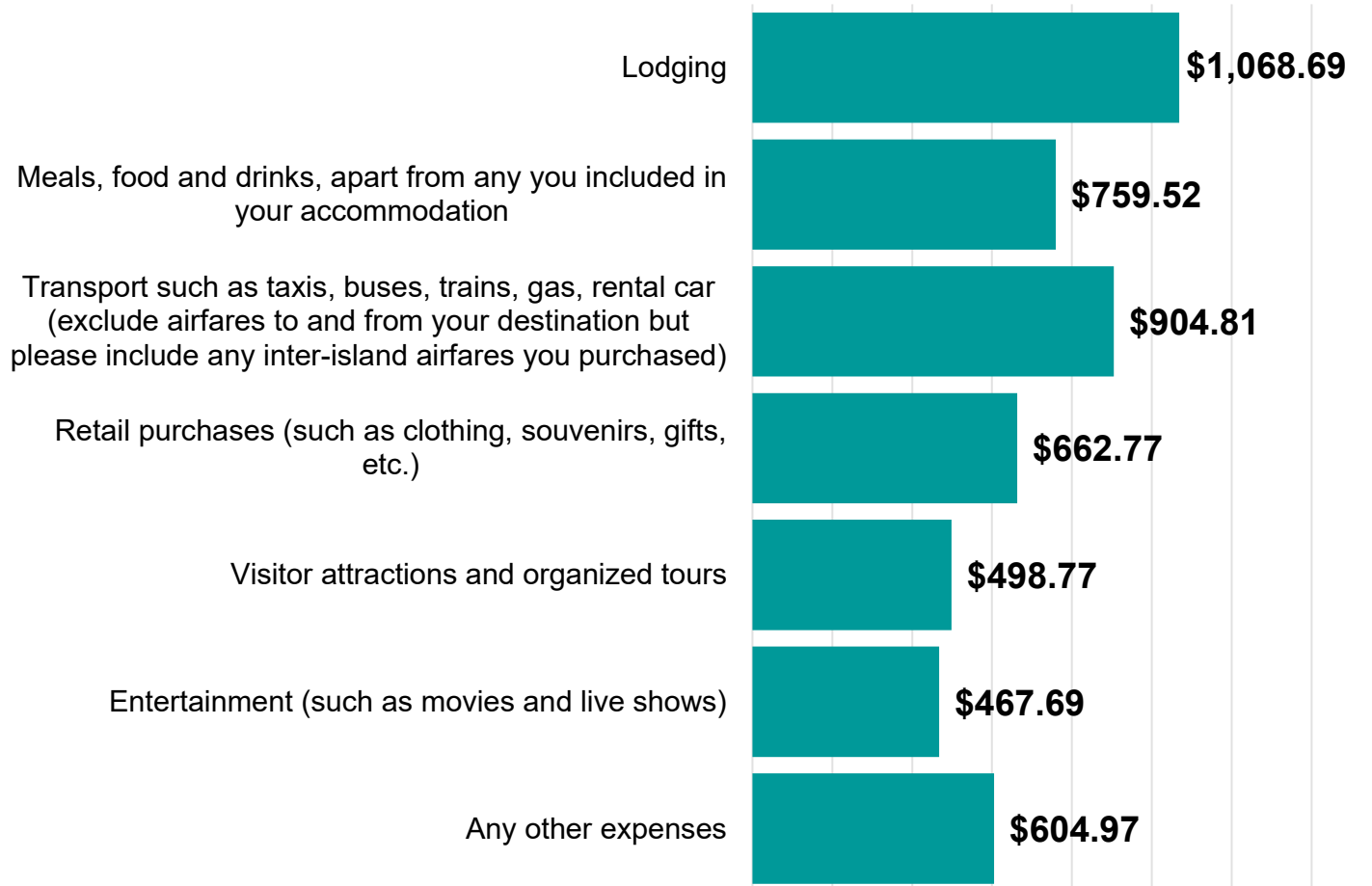
Distance Travelled on Annual Vacation



Sample Size: n=149

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

Average Spend



Sample Size: n=149

Spend Per Person Per Day

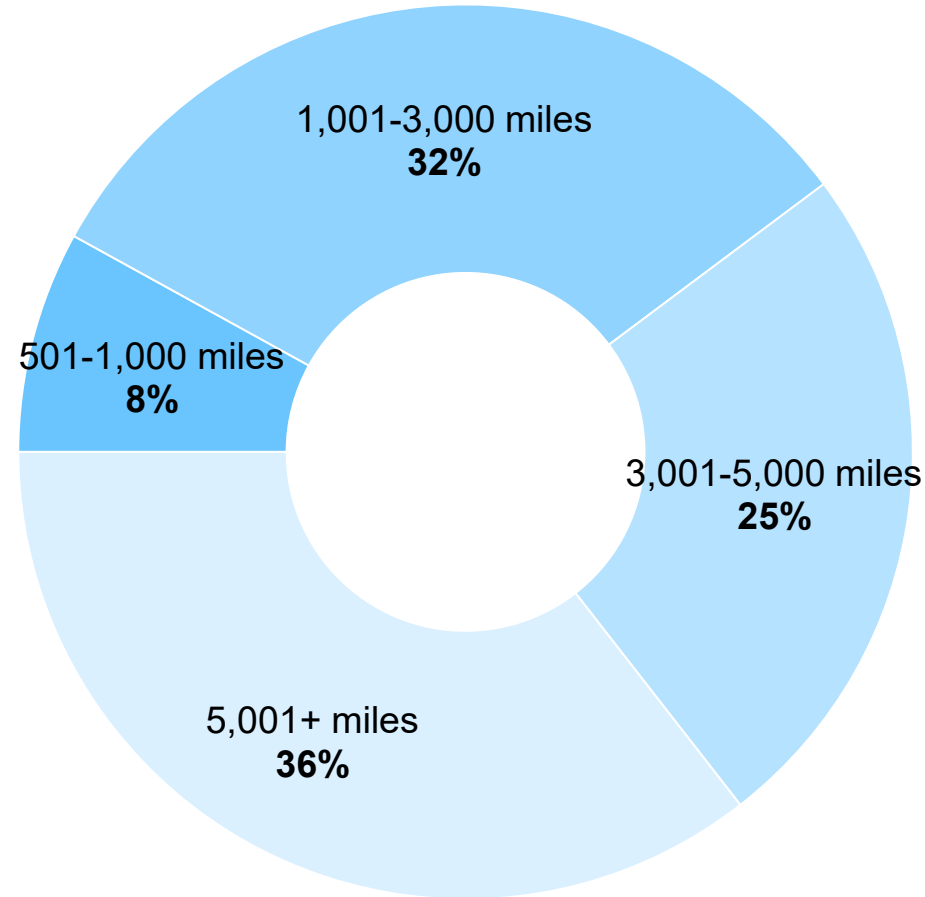


\$241.22

Ave. Per Person Per Day Spend

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

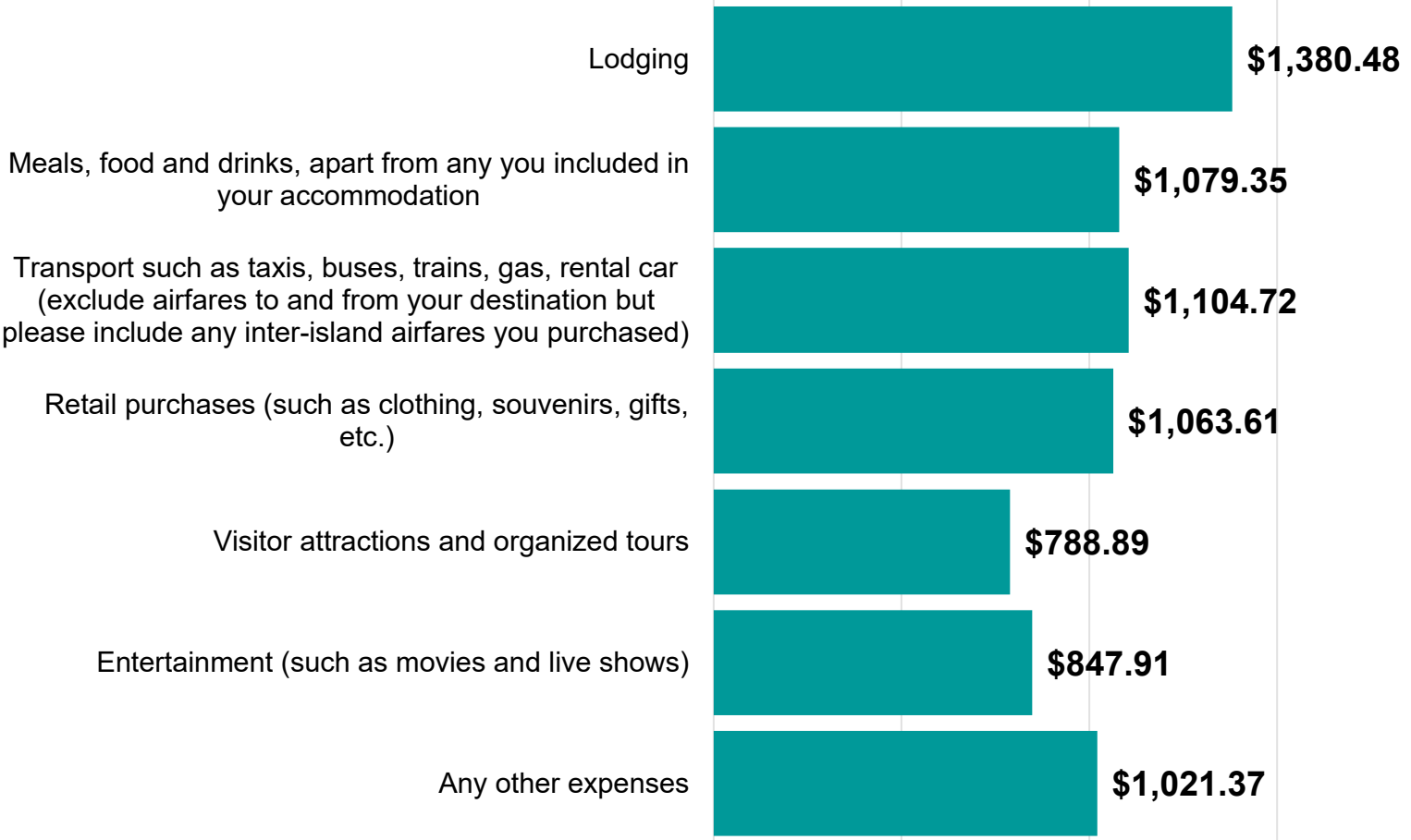
Distance Travelled on Annual Vacation



Sample Size: n=55

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

Average Spend



Sample Size: n=55

Spend Per Person Per Day

6.7
Ave # Nights on Annual Vacation

3.5
Ave # of People on Annual Vacation



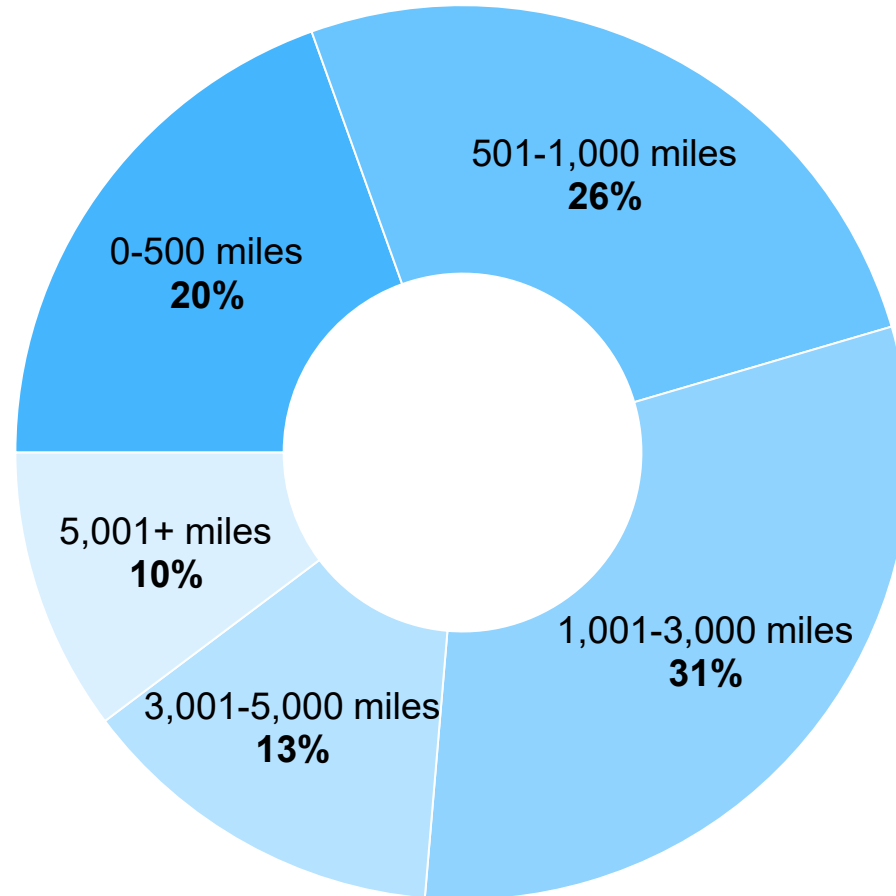
\$316.00

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

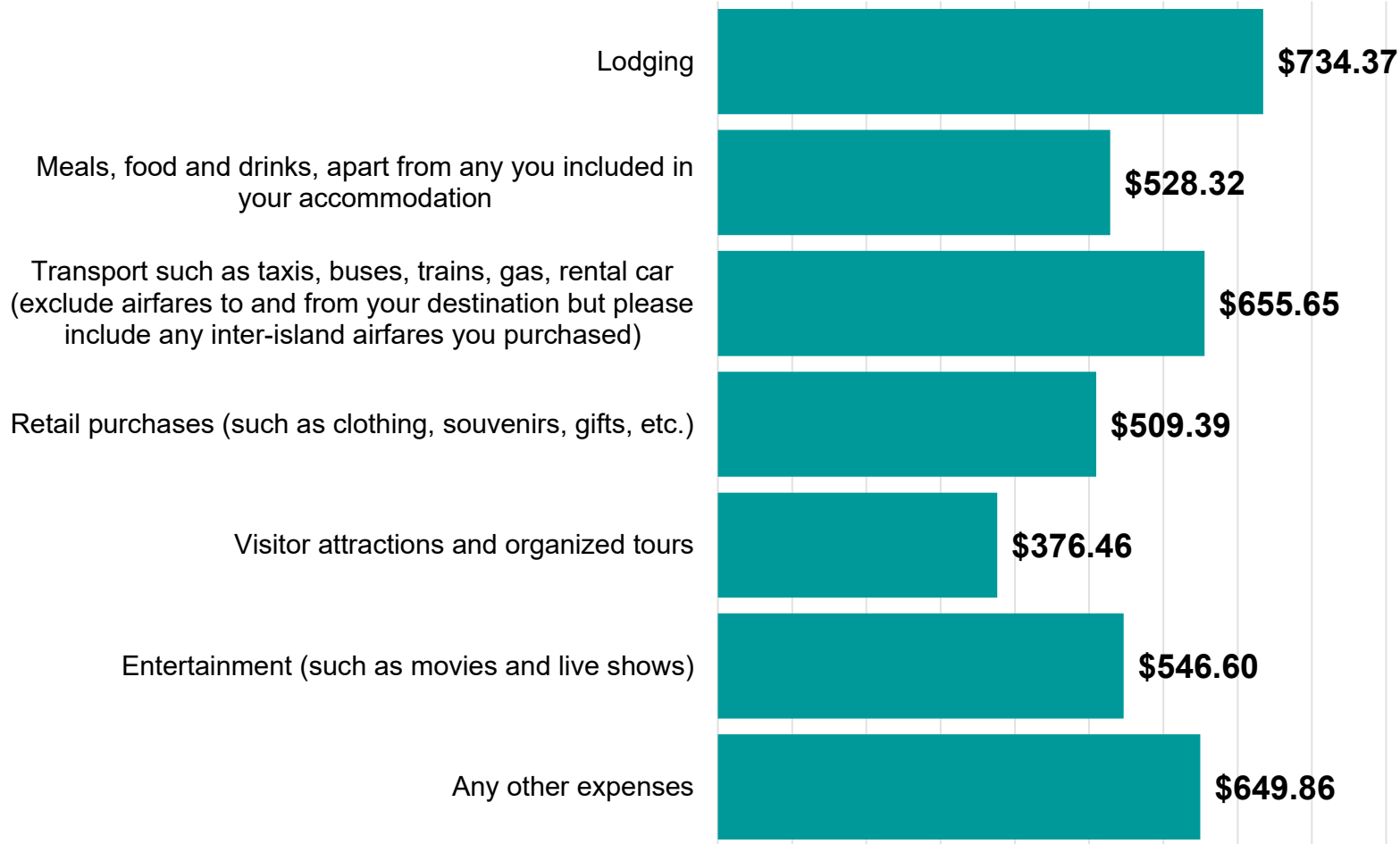
Distance Travelled on Annual Vacation



Sample Size: n=396

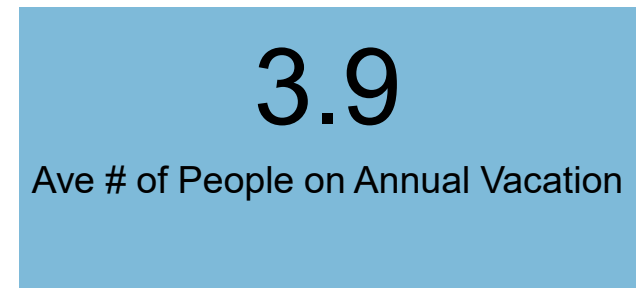
U.S. Long-Distance Travelers: Annual Vacation

Average Spend



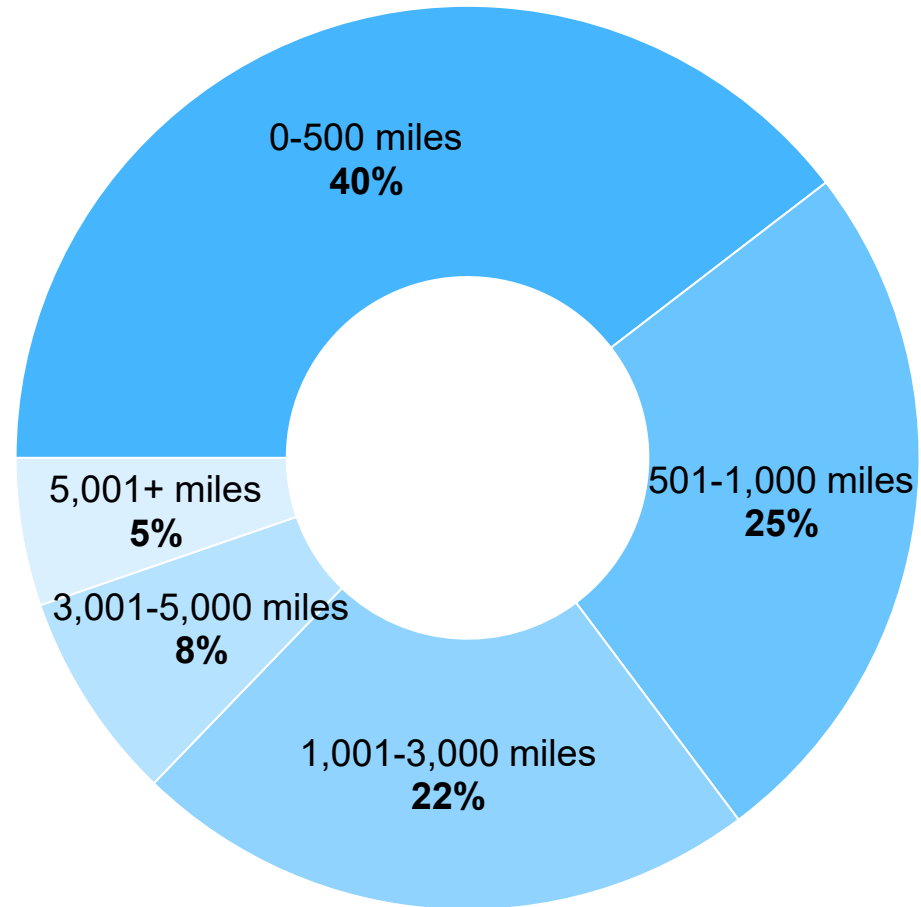
Sample Size: n=396

Spend Per Person Per Day



U.S. Nat Rep: Annual Vacation

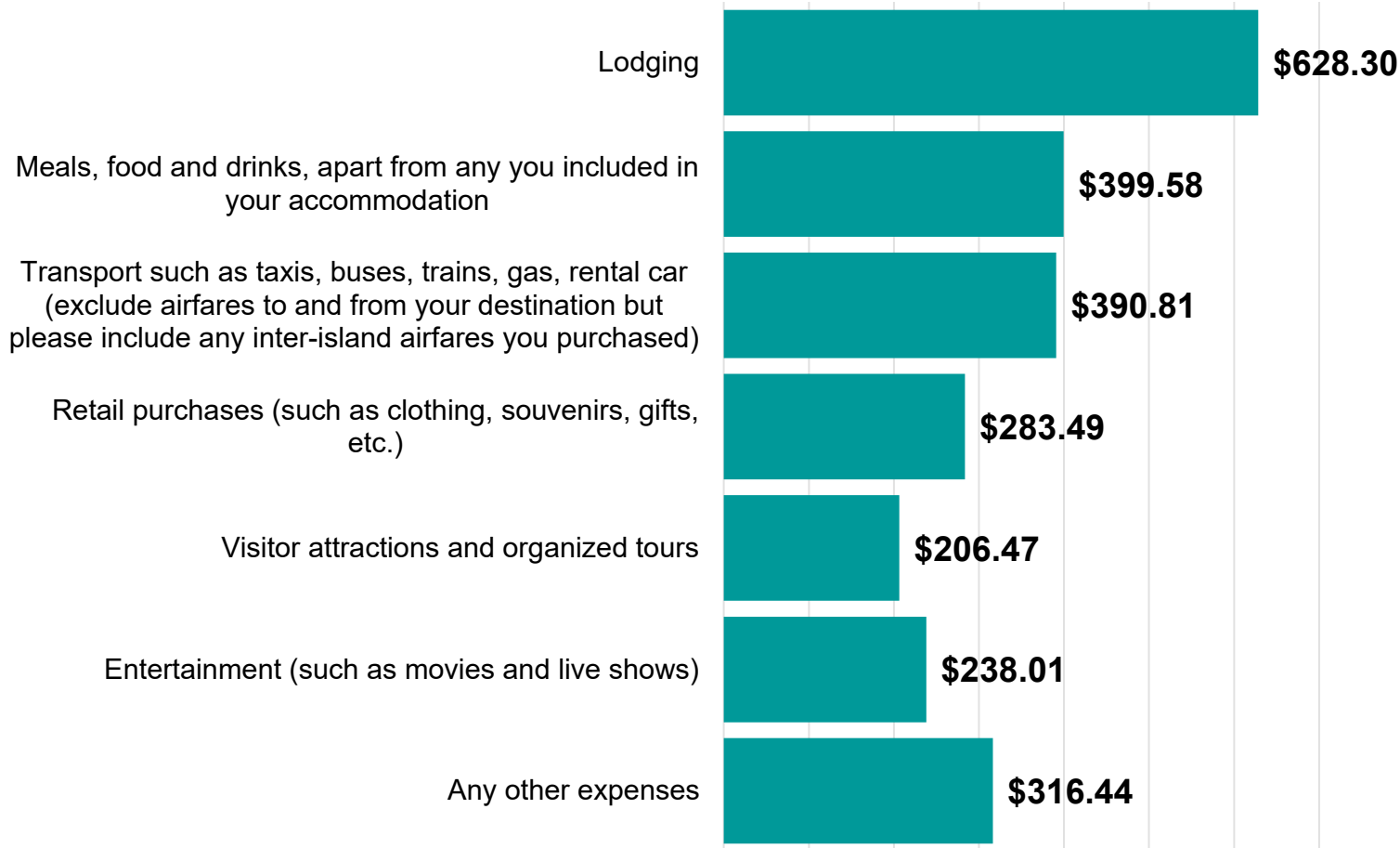
Distance Travelled on Annual Vacation



Sample Size: n=1,839

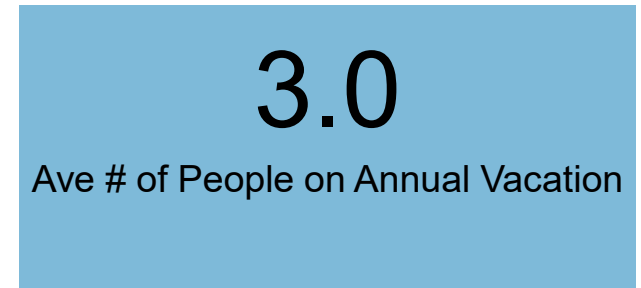
U.S. Nat Rep: Annual Vacation

Average Spend



Sample Size: n=1,839

Spend Per Person Per Day



\$160.36

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	46%	49%	47%	50%
Value for money	45%	48%	50%	56%
Entertainment and nightlife	37%	47%	40%	28%
Consideration of sustainable principles	37%	42%	35%	26%
Natural attractions/activities	45%	51%	45%	43%
Cultural attractions	41%	42%	44%	36%
Opportunity to experience local restaurants/businesses	43%	42%	42%	39%
Family-friendly location and activities	38%	40%	39%	39%
Safe and Secure Destination	60%	64%	59%	62%

Sample Size:

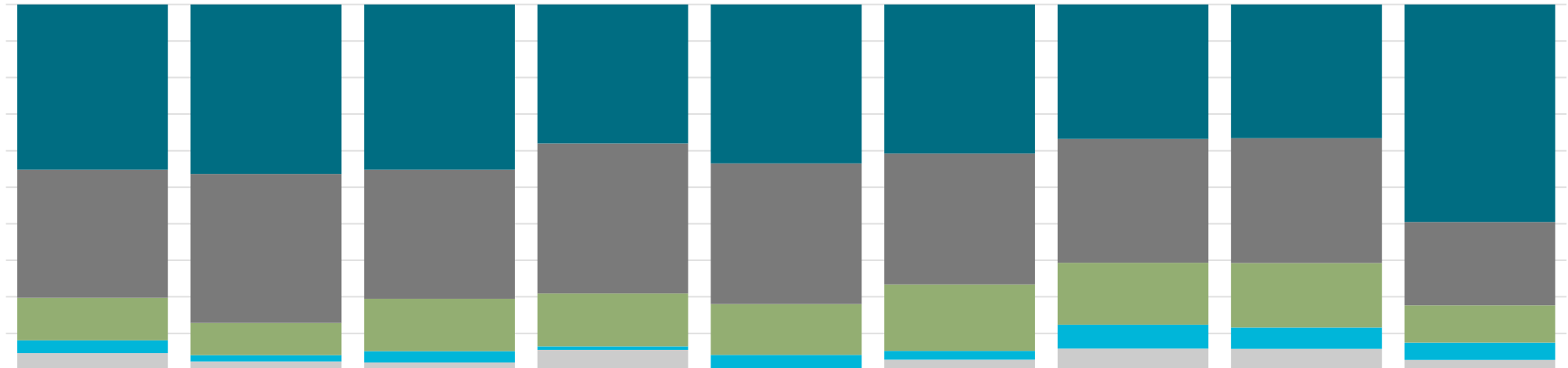
n=149

n=55

n=396

n=1,839

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

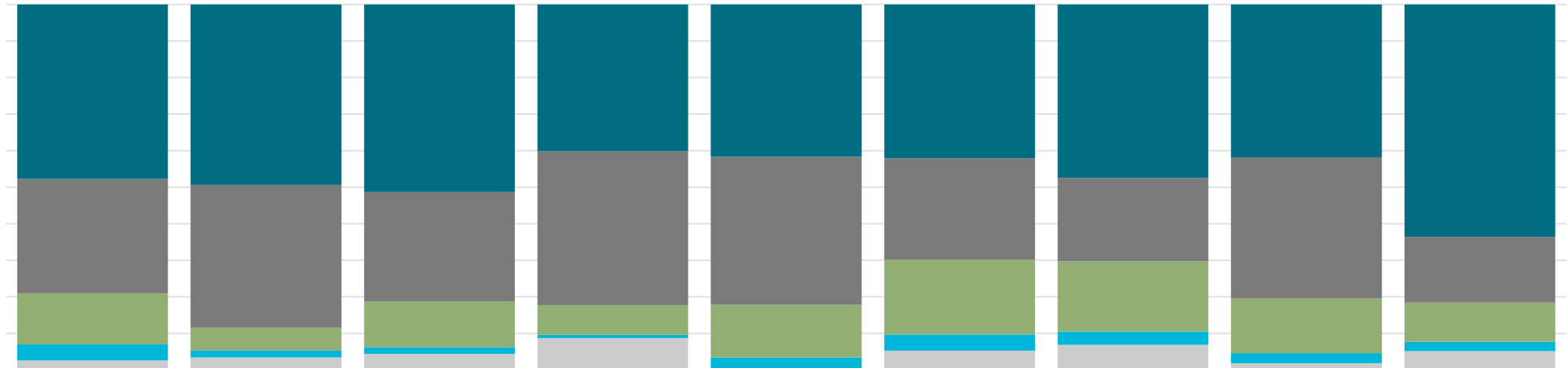


	Value for money	Comfort and accessibility	Natural attractions/activities	Family friendly locations and activities	Opportunity to experience local restaurants/businesses	Cultural attractions	Entertainment and nightlife	Consideration of sustainable principles	Safe and secure destination
Very Important 5	45%	46%	45%	38%	43%	41%	37%	37%	60%
4	35%	41%	35%	41%	39%	36%	34%	34%	23%
3	12%	9%	14%	14%	14%	18%	17%	18%	10%
2	3%	2%	3%	1%	4%	2%	7%	6%	5%
Not very Important 1	5%	2%	2%	5%	0%	3%	6%	6%	3%

Not very Important 1
 2
 3
 4
 Very Important 5

Sample Size: n=149

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

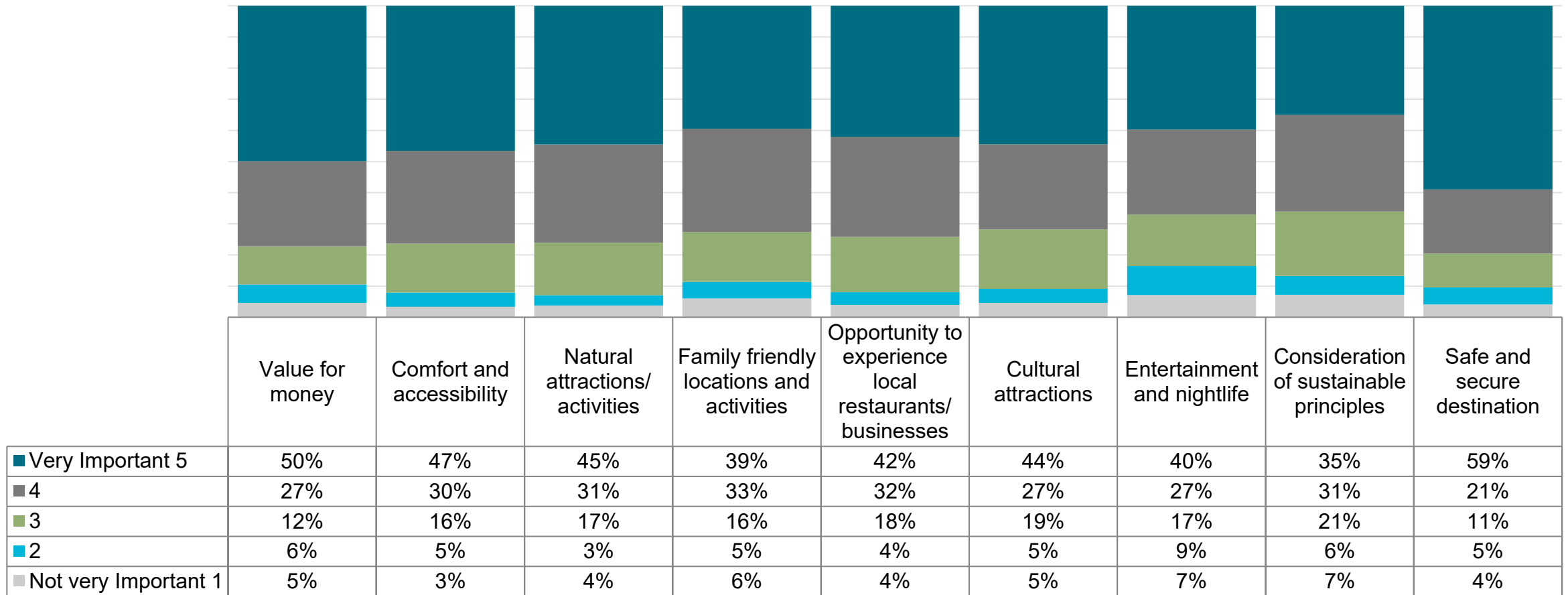


	Value for money	Comfort and accessibility	Natural attractions/activities	Family friendly locations and activities	Opportunity to experience local restaurants/businesses	Cultural attractions	Entertainment and nightlife	Consideration of sustainable principles	Safe and secure destination
Very Important 5	48%	49%	51%	40%	42%	42%	47%	42%	64%
4	31%	39%	30%	42%	41%	28%	23%	39%	18%
3	14%	6%	13%	8%	14%	21%	19%	15%	11%
2	4%	2%	2%	1%	3%	4%	4%	3%	3%
Not very Important 1	3%	3%	4%	9%	0%	5%	7%	2%	5%

Not very Important 1
 2
 3
 4
 Very Important 5

Sample Size: n=55

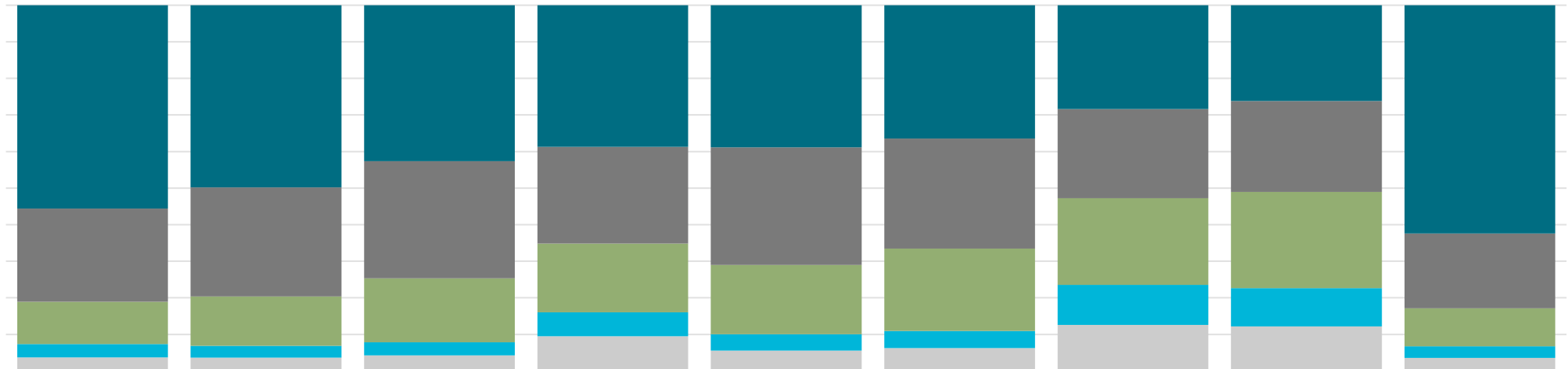
U.S. Long Distance Travelers: Importance of Travel Factors



Not very Important 1
 2
 3
 4
 Very Important 5

Sample Size: n=396

U.S. Nat Rep: Importance of Travel Factors



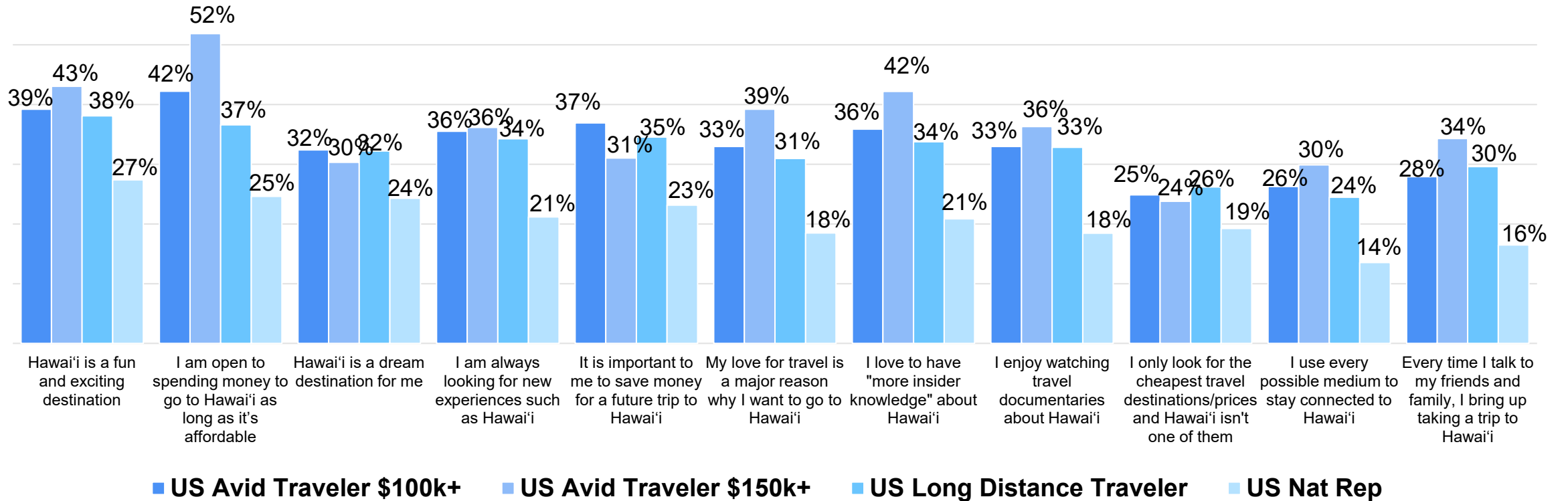
	Value for money	Comfort and accessibility	Natural attractions/activities	Family friendly locations and activities	Opportunity to experience local restaurants/businesses	Cultural attractions	Entertainment and nightlife	Consideration of sustainable principles	Safe and secure destination
Very Important 5	56%	50%	43%	39%	39%	36%	28%	26%	62%
4	25%	30%	32%	26%	32%	30%	24%	25%	20%
3	12%	13%	18%	19%	19%	23%	24%	26%	10%
2	4%	3%	4%	7%	5%	5%	11%	10%	3%
Not very Important 1	4%	4%	4%	9%	6%	6%	13%	12%	4%

Not very Important 1
 2
 3
 4
 Very Important 5

Sample Size: n=1,839

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

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



Sample Size:

n=149

n=55

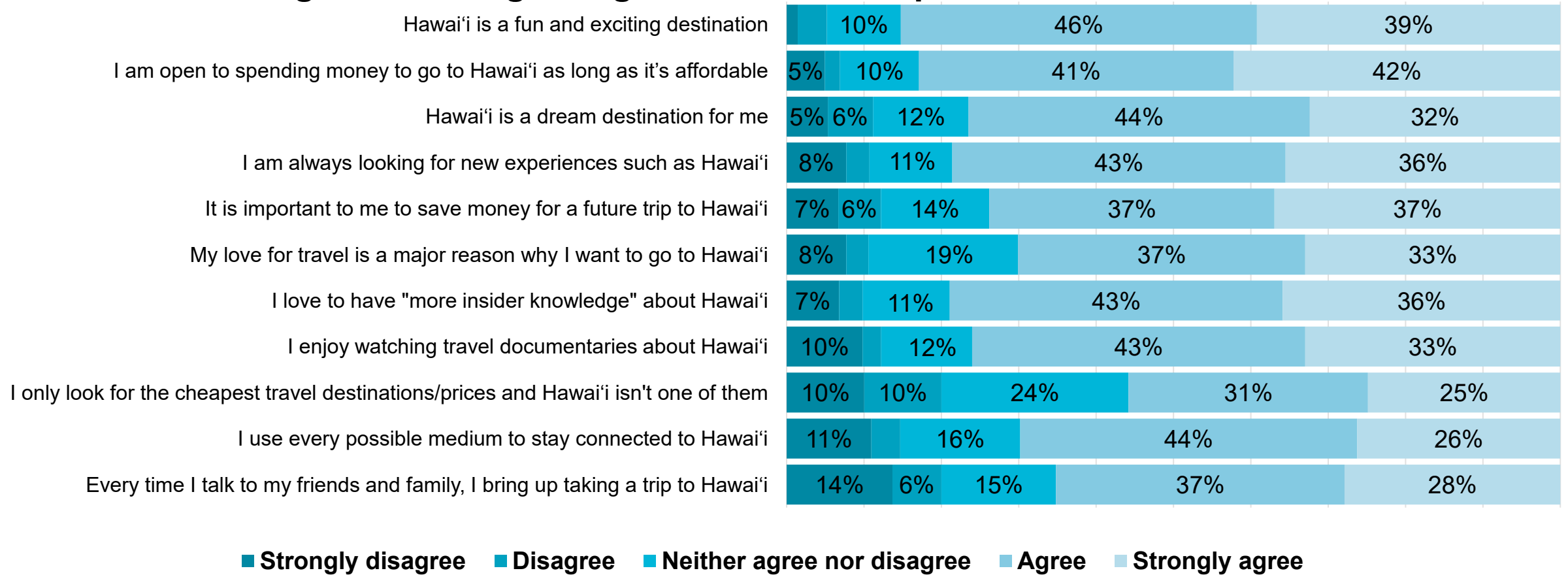
n=396

n=1,839

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

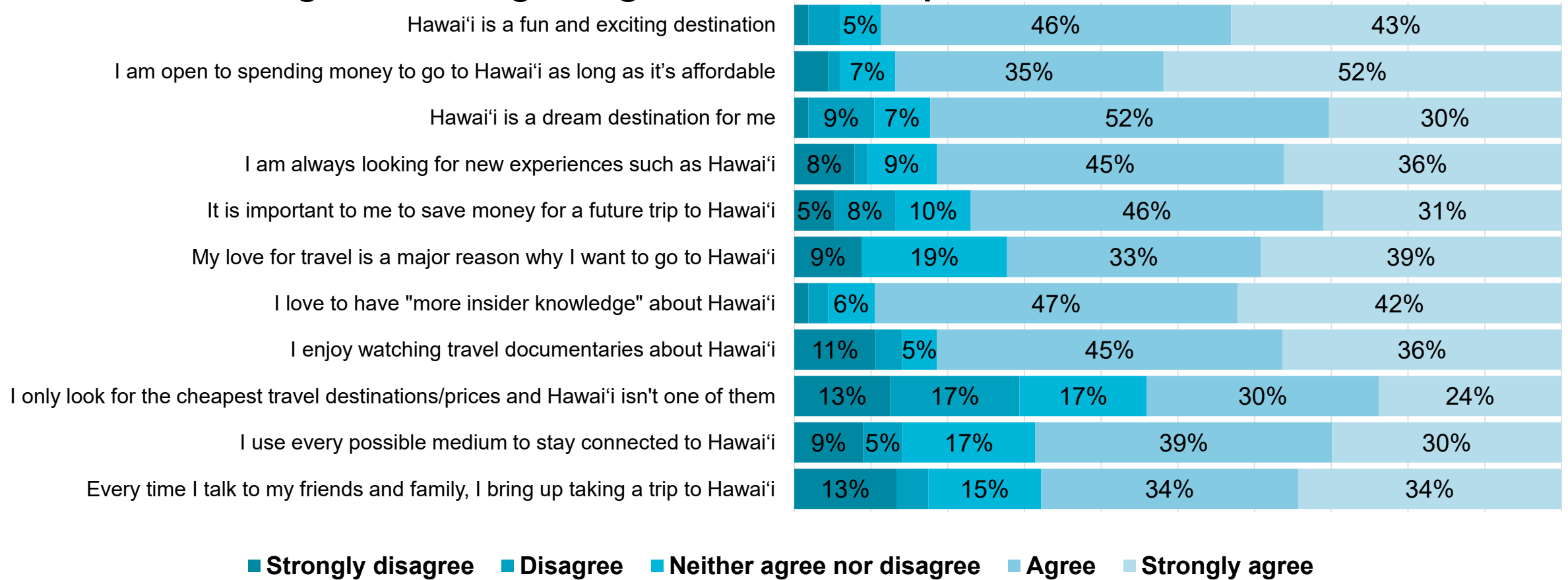
Agreement Regarding Hawai'i as an Aspirational Destination



Sample Size: n=149

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

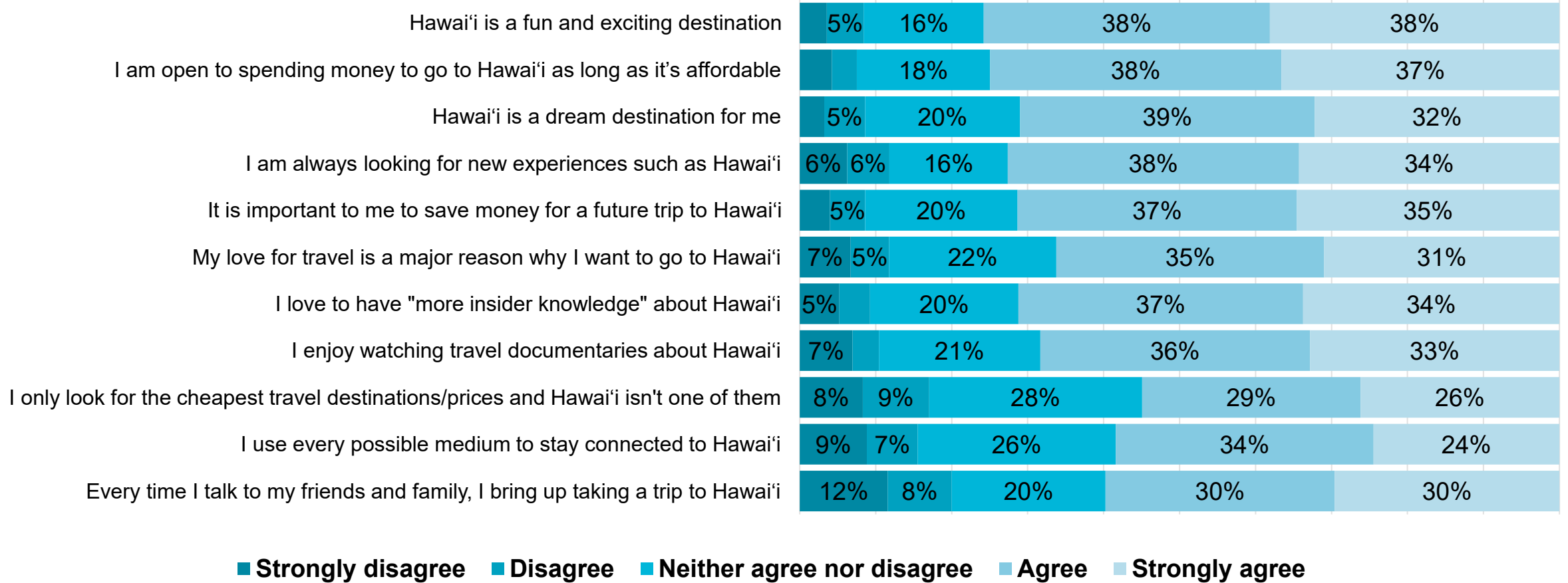
Agreement Regarding Hawai'i as an Aspirational Destination



Sample Size: n=55

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

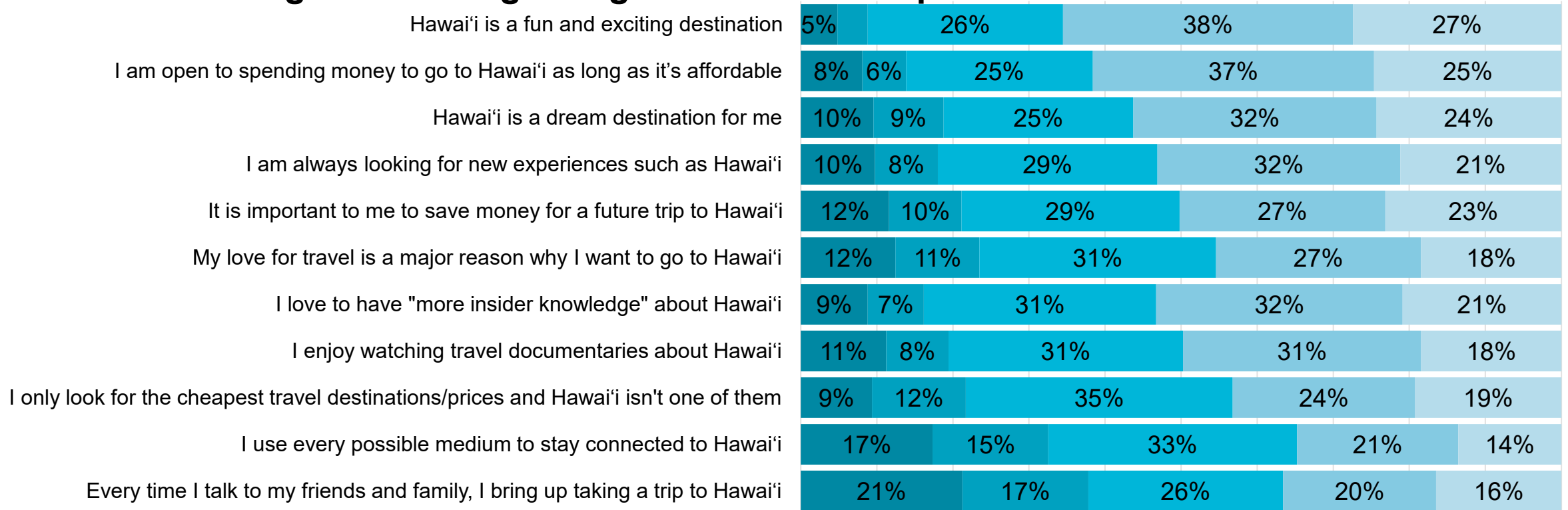
Agreement Regarding Hawai'i as an Aspirational Destination



Sample Size: n=396

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

Agreement Regarding Hawai'i as an Aspirational Destination

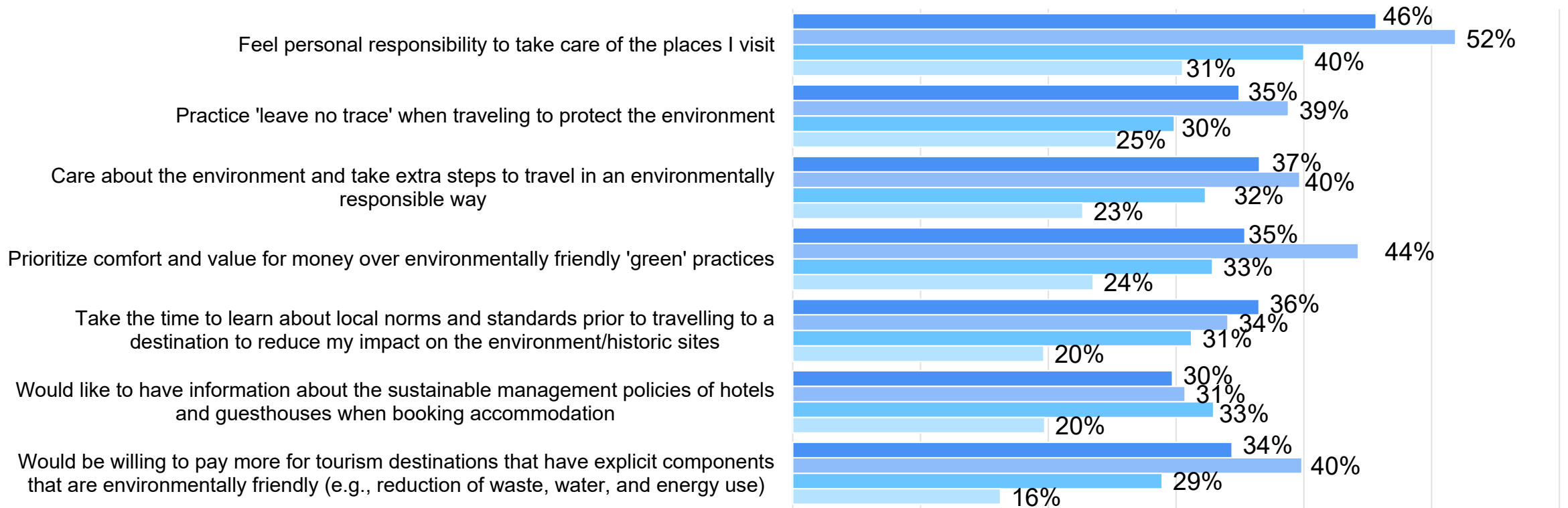


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=1,839

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=149

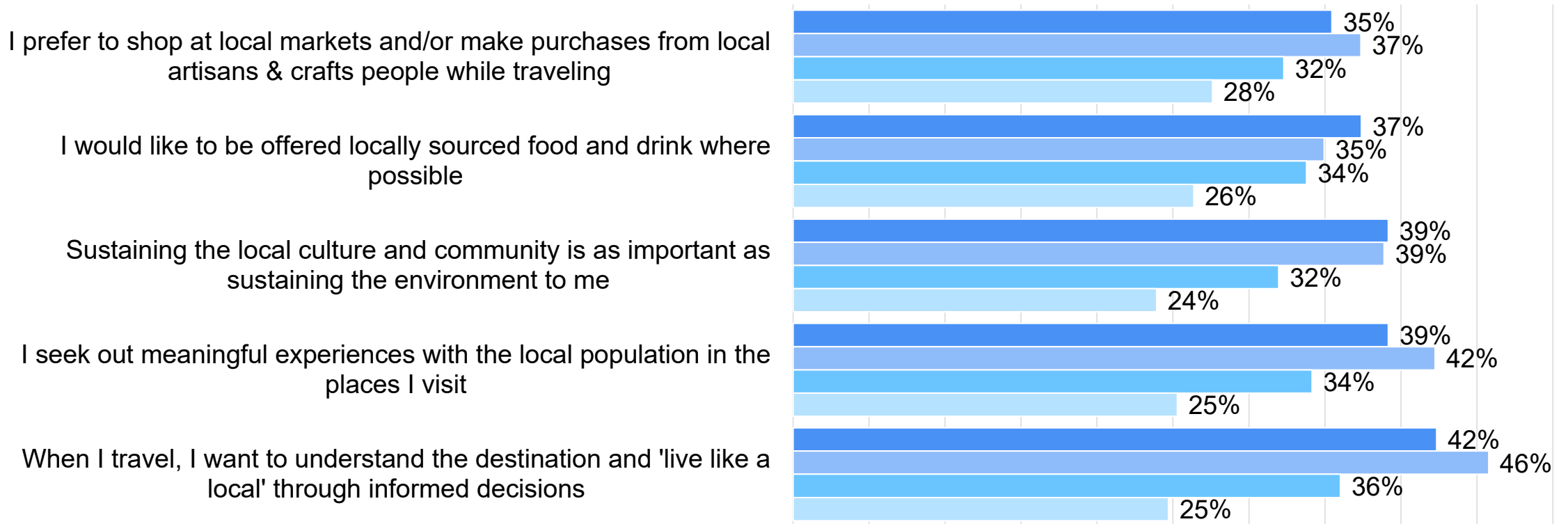
n=55

n=396

n=1,839

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=149

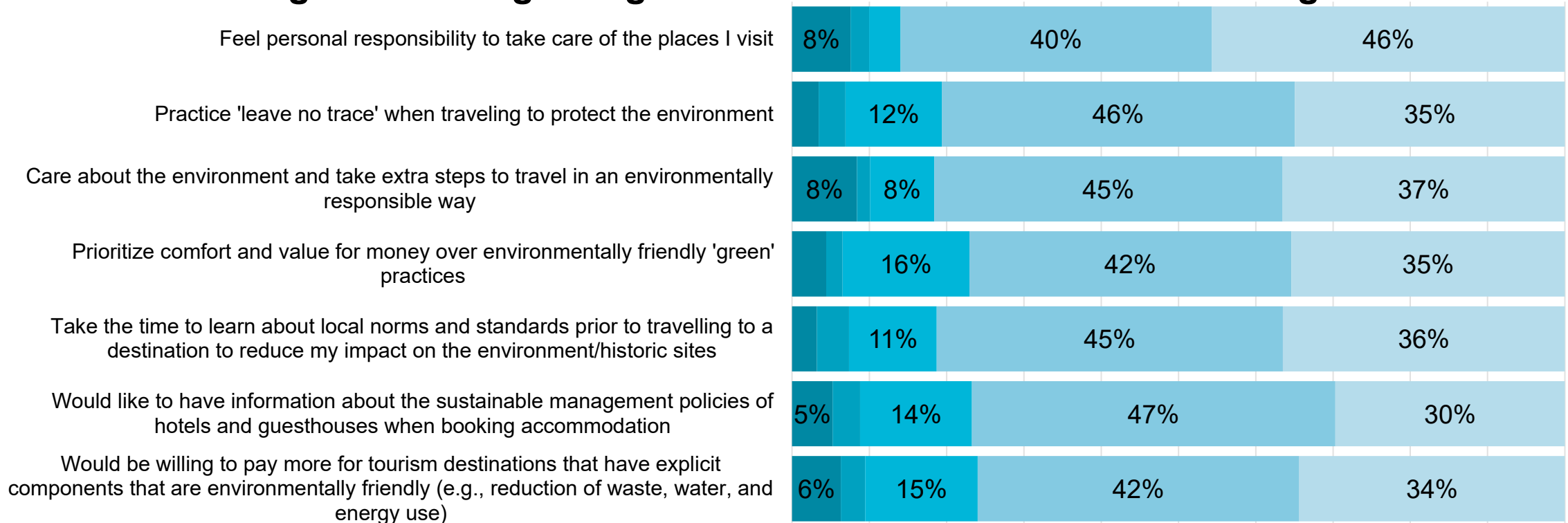
n=55

n=396

n=1,839

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

Agreement Regarding Sustainable Practices While Traveling

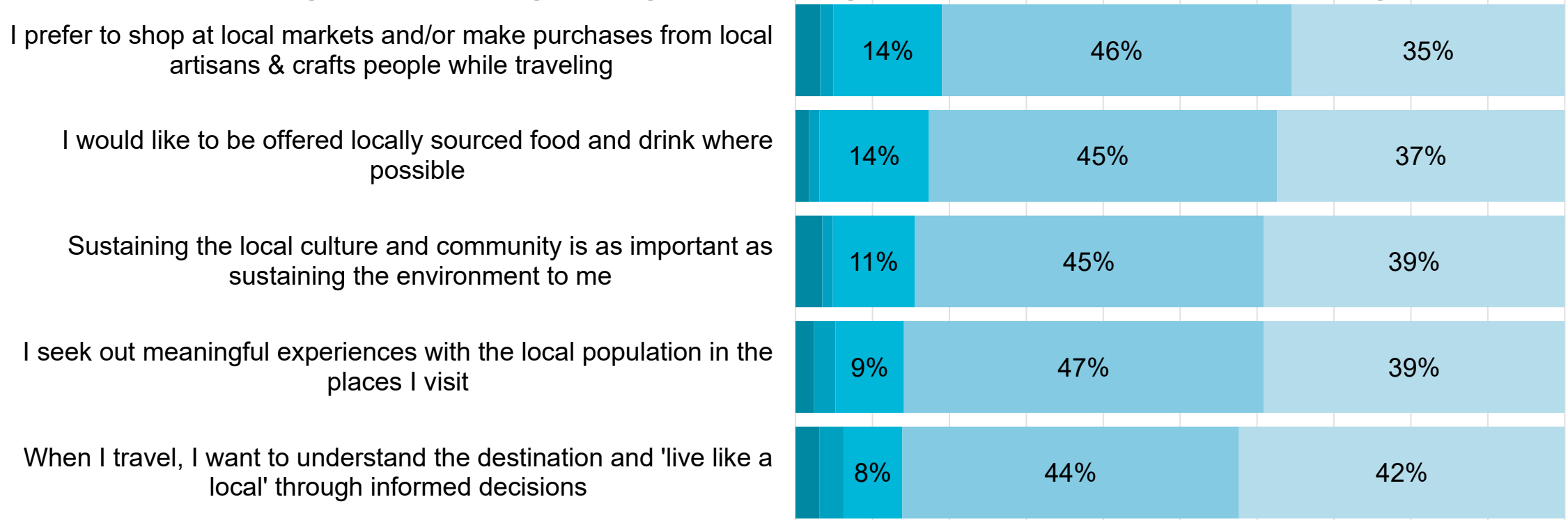


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=149

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

Agreement Regarding Sustaining Local Culture While Traveling

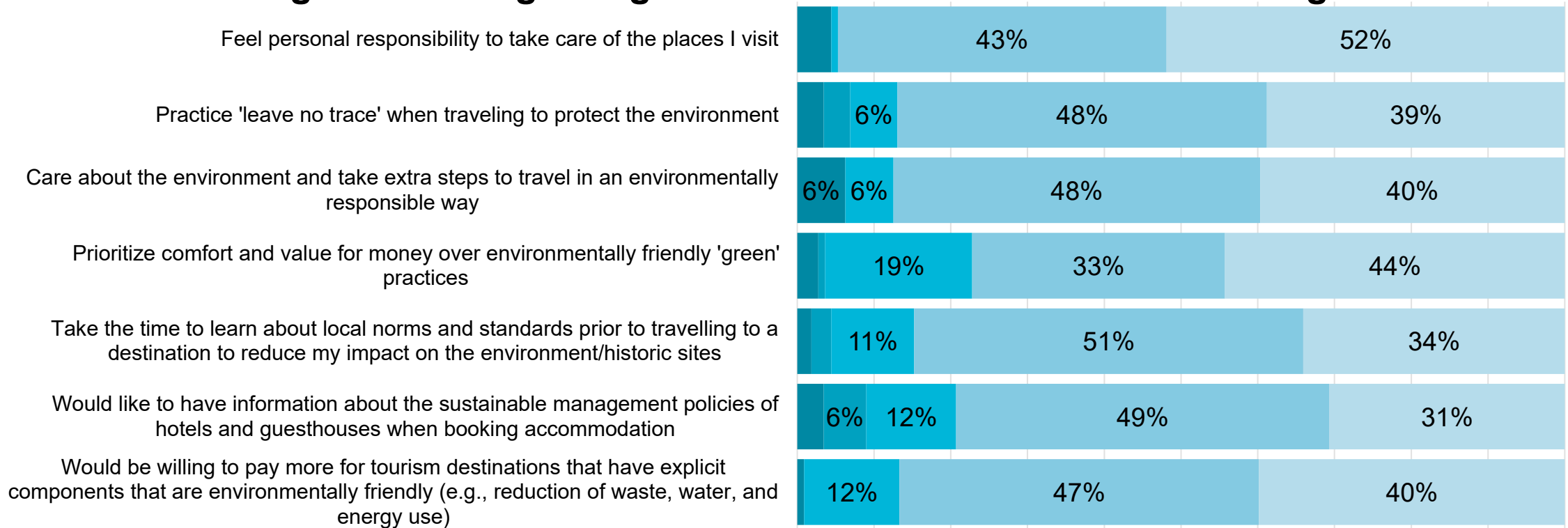


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=149

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

Agreement Regarding Sustainable Practices While Traveling

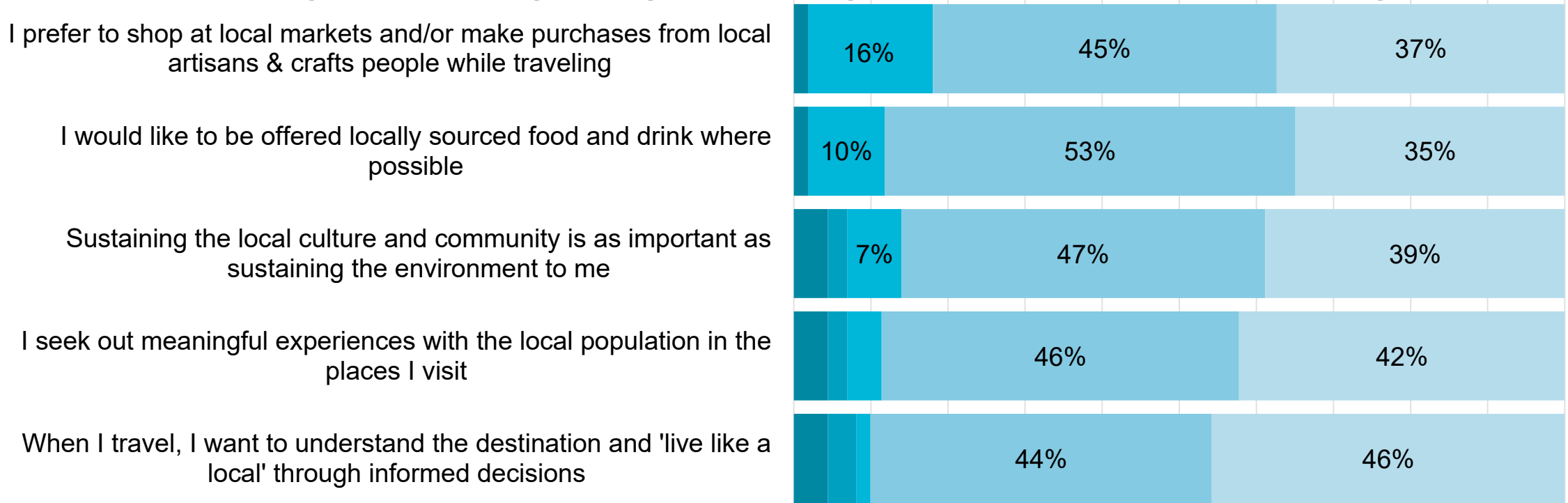


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=55

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

Agreement Regarding Sustaining Local Culture While Traveling

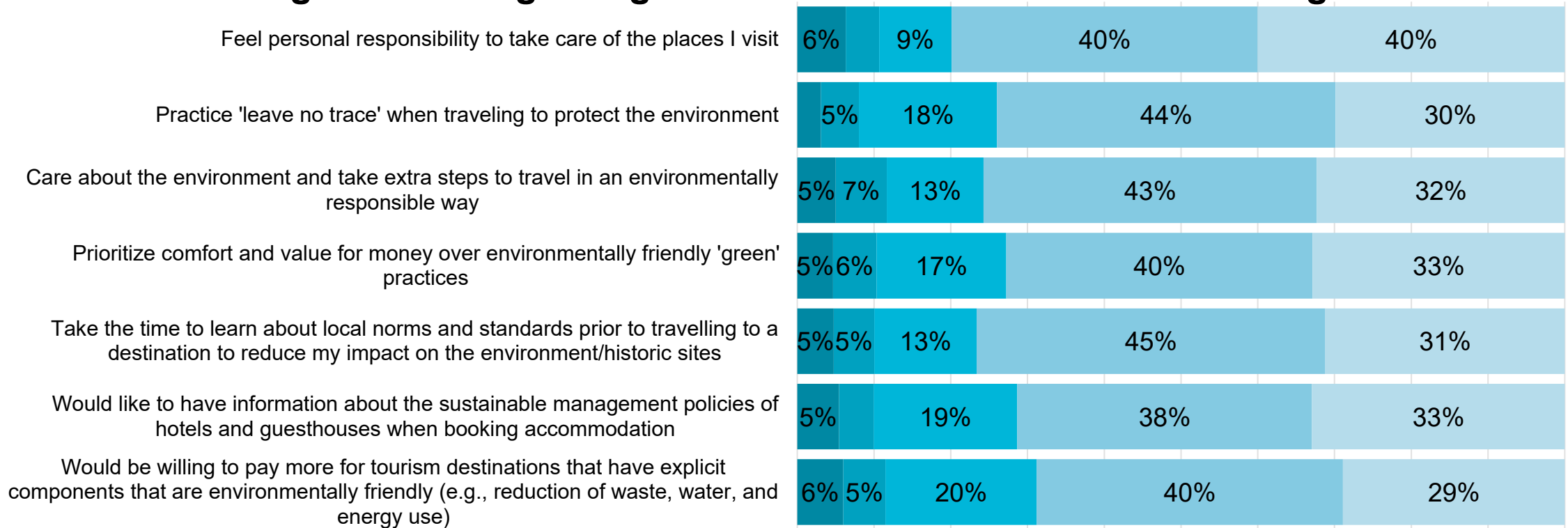


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=55

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=396

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

Agreement Regarding Sustaining Local Culture While Traveling

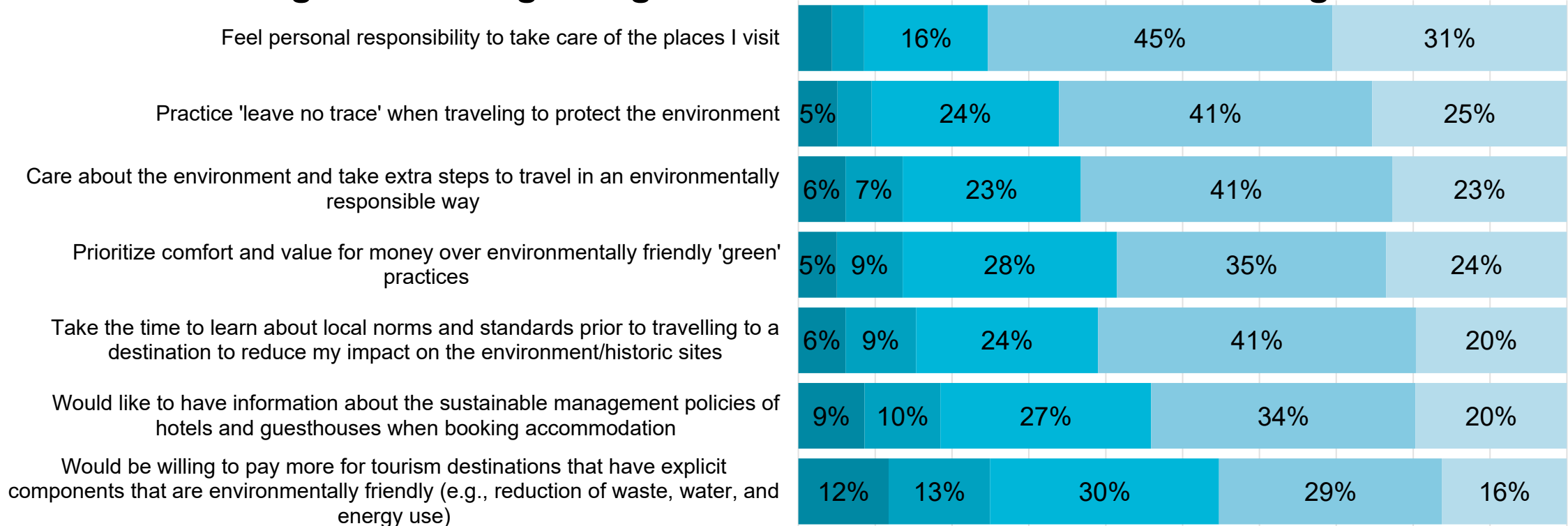


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=396

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

Agreement Regarding Sustainable Practices While Traveling

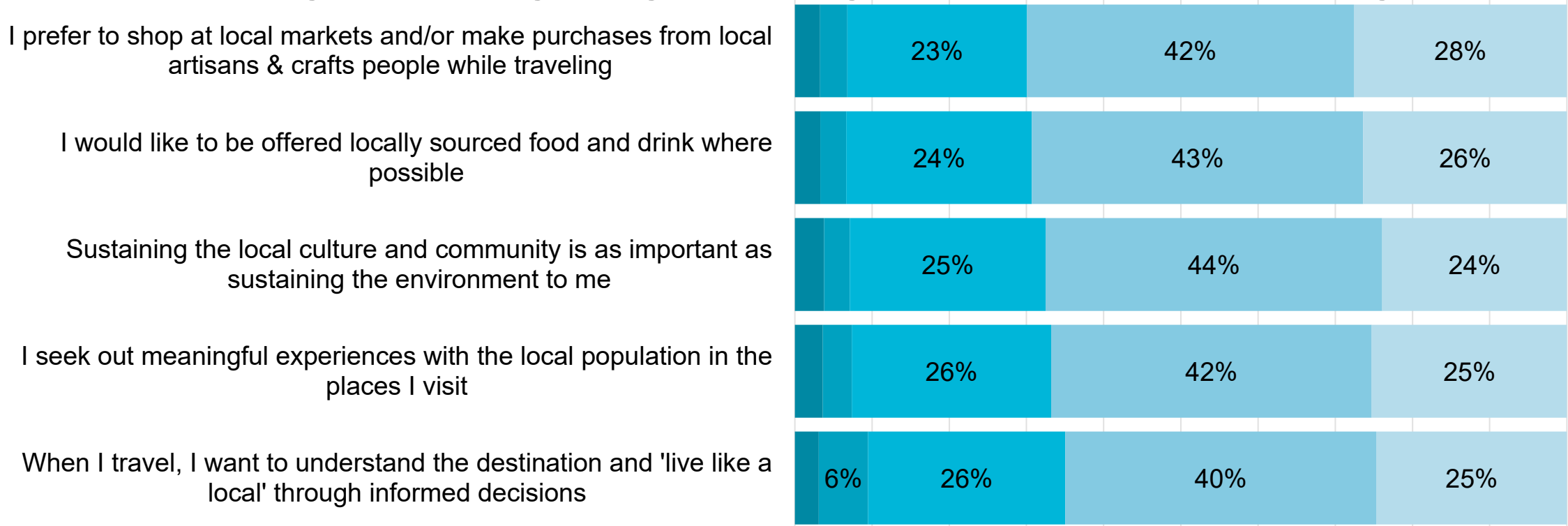


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=1,839

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

Agreement Regarding Sustaining Local Culture While Traveling

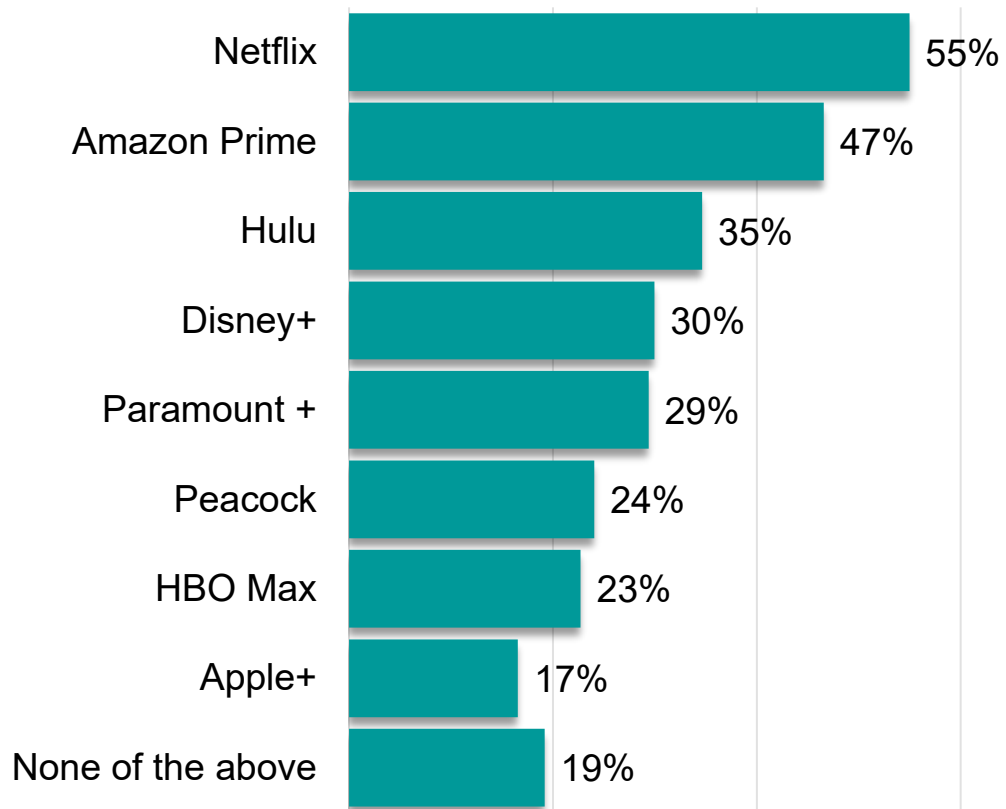


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

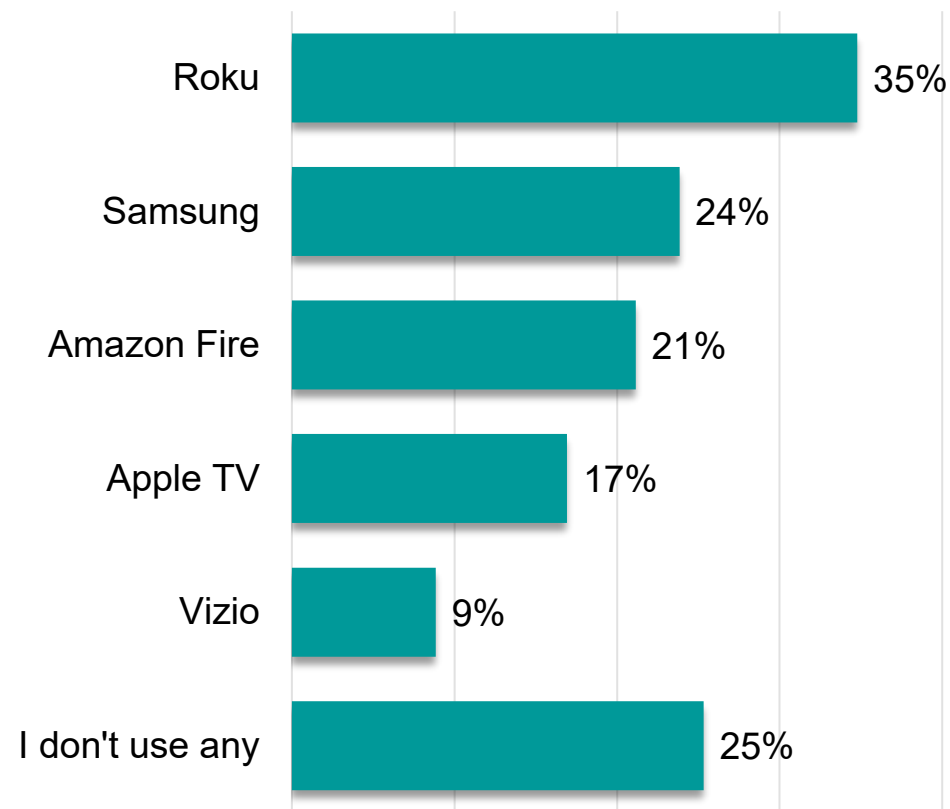
Sample Size: n=1,839

U.S. Media Consumption

Streaming Platforms Used Weekly



Connected Device Used

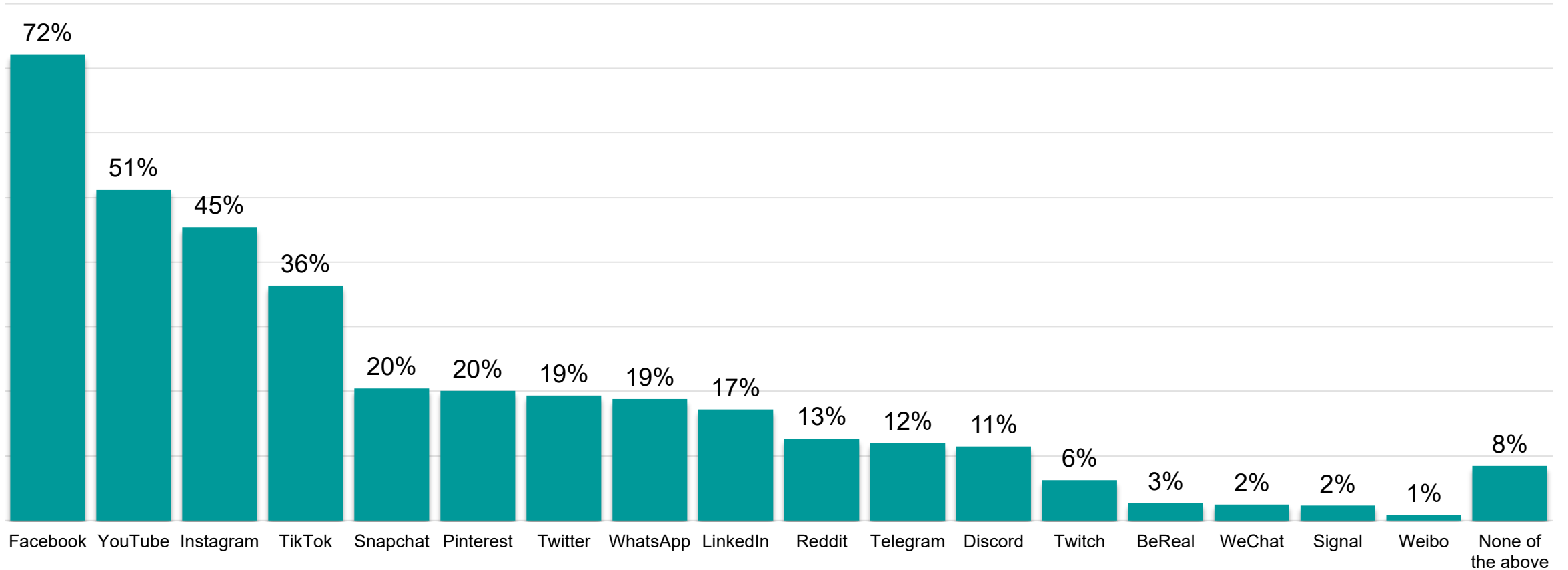


Sample Size: n=1,839

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=1,839

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	41%
Online	29%
Social Media	38%
TV commercials	27%
YouTube	30%
TV Program/Documentary	20%
Email	17%
Radio	8%
Newspaper	9%
Out of home advertising (e.g. Poster Billboards, bus shelter advertisements, etc.)	9%
I don't recall	12%

Actions Taken After Seeing an Ad for a Destination

I search for information about the destination online	39%
I talk to friends/family about the destination	31%
I go to the destination's website	30%
I look up the destination on social media	24%
I book travel to the destination almost immediately	12%
I don't do anything	20%
None of the above	12%

Sample Size: n=1,839