



Vision Insights U.S. Traveler Profiles October 2025

November 20, 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

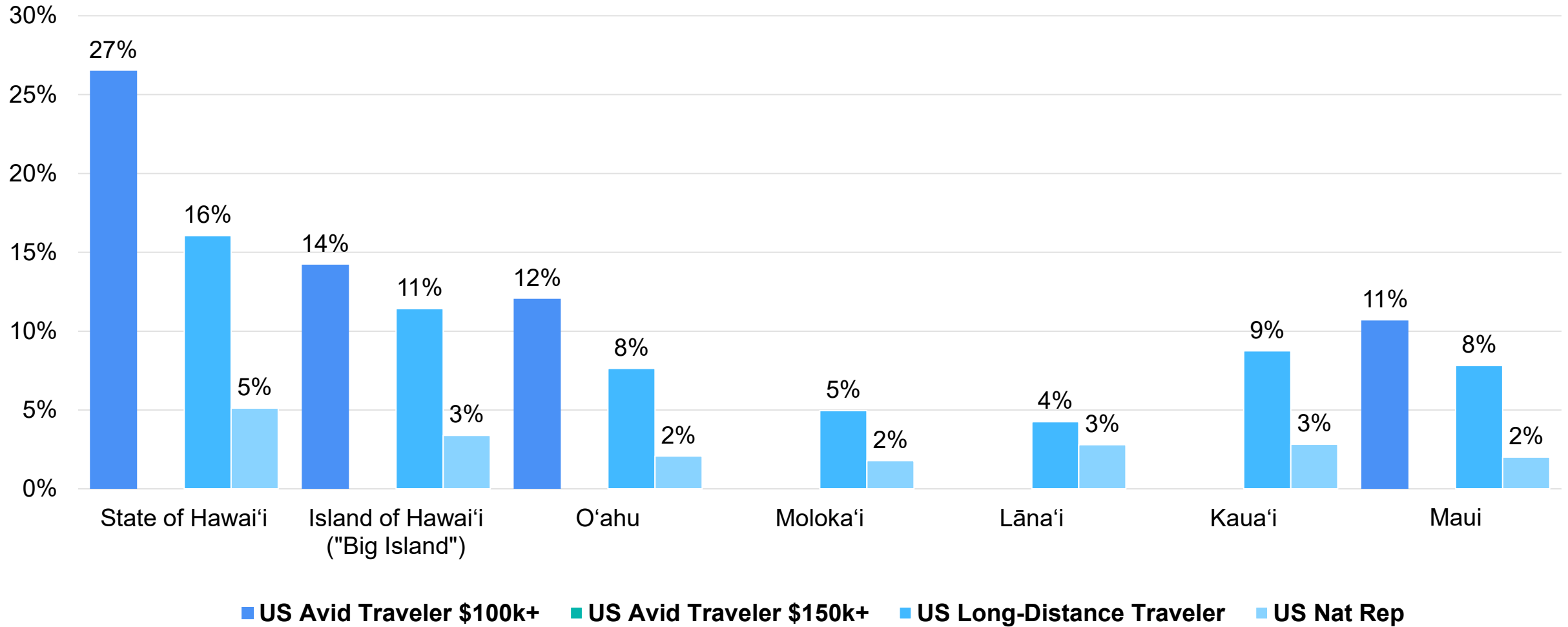
Avid Traveler \$150k+

- 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

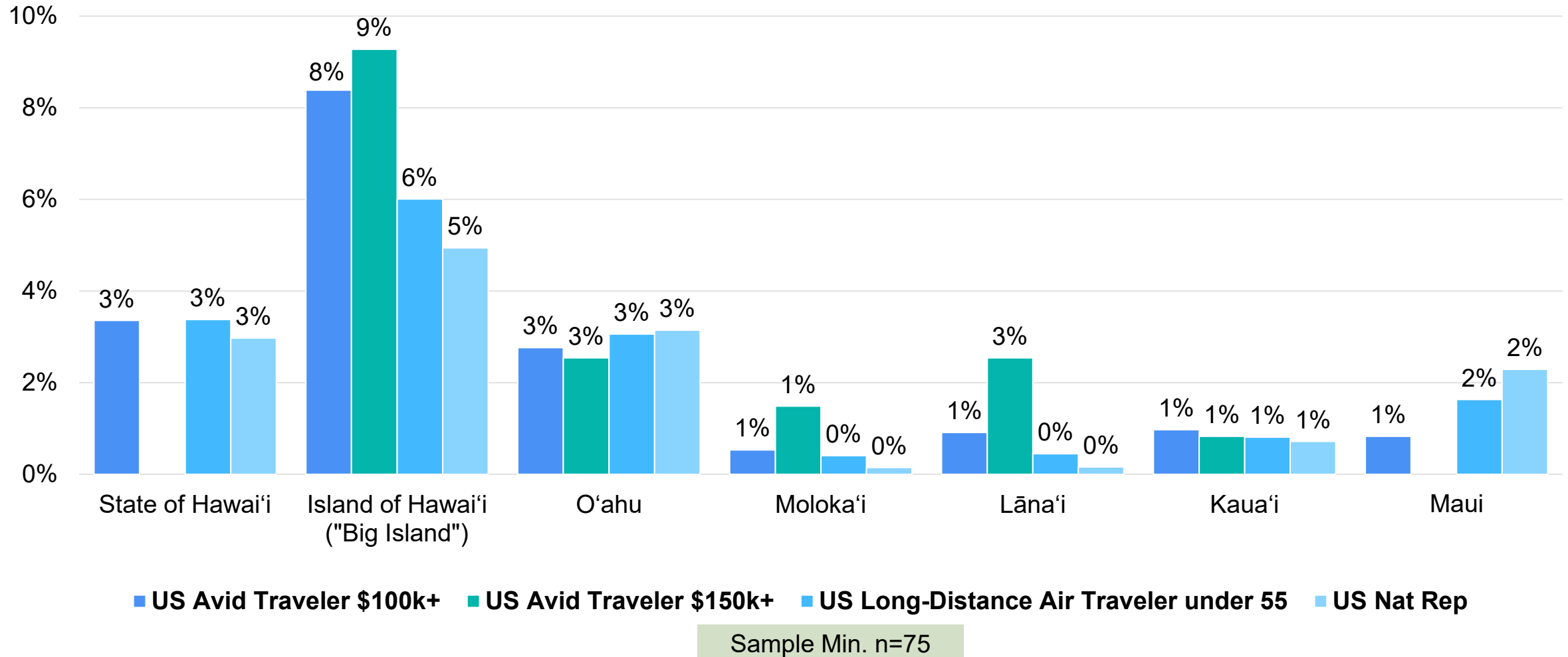
U.S. - Leisure Trip In Past 12 Months



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

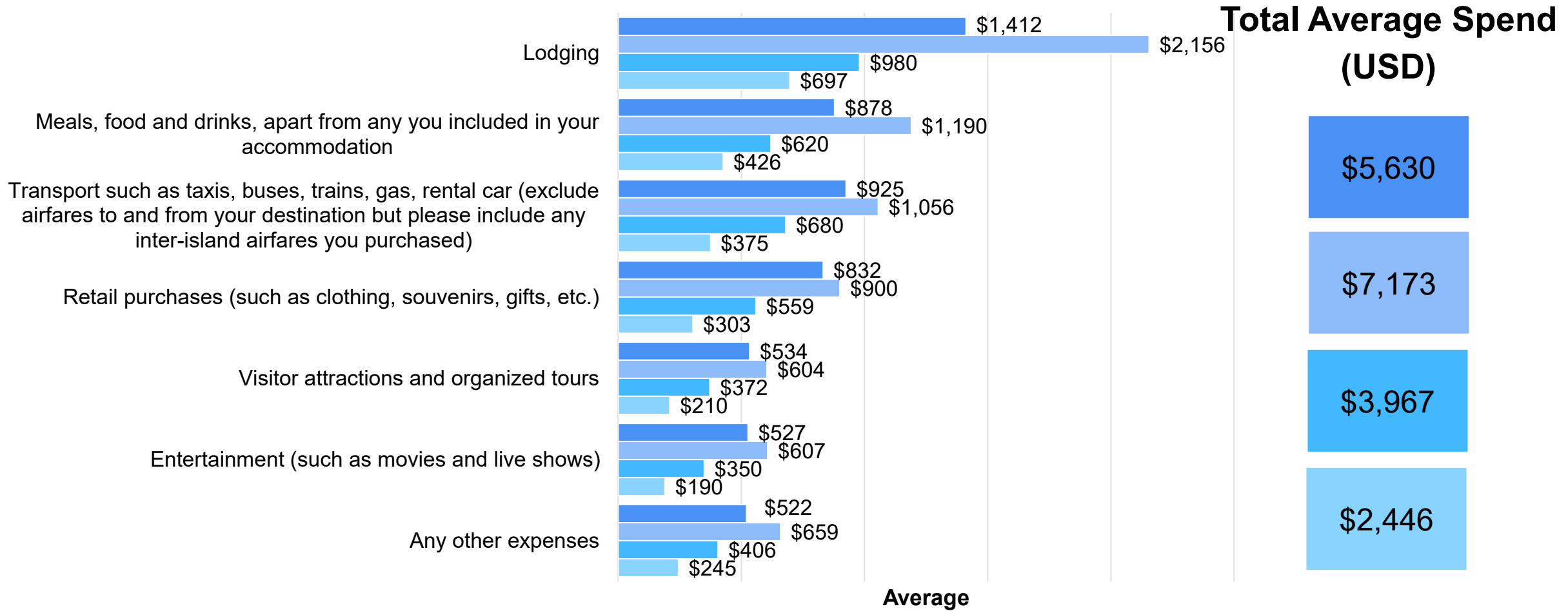
U.S. – Next Destination for Leisure Trip



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	19.8%	California	27.9%	New York	15.6%	New York	9.7%
Texas	16.3%	New York	18.5%	California	13.7%	Florida	8.8%
California	16.1%	Texas	17.5%	Texas	10.6%	Texas	8.2%
Illinois	3.3%	Illinois	6.0%	Florida	8.5%	California	7.5%
Virginia	3.2%	Arizona	3.7%	Georgia	4.1%	Pennsylvania	4.8%
Florida	3.2%	New Jersey	2.9%	Illinois	3.9%	Georgia	4.1%
Pennsylvania	3.0%	Washington	2.7%	Pennsylvania	3.4%	Ohio	3.8%
Massachusetts	2.7%	Maryland	2.7%	Virginia	3.2%	Illinois	3.7%
Georgia	2.5%	Pennsylvania	1.7%	New Jersey	2.8%	Virginia	3.1%
New Jersey	2.5%	Michigan	1.5%	Michigan	2.7%	North Carolina	2.9%
Sample Size:	n=237	Sample Size:	n=84	Sample Size:	n=546	Sample Size:	n=1,923

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=237

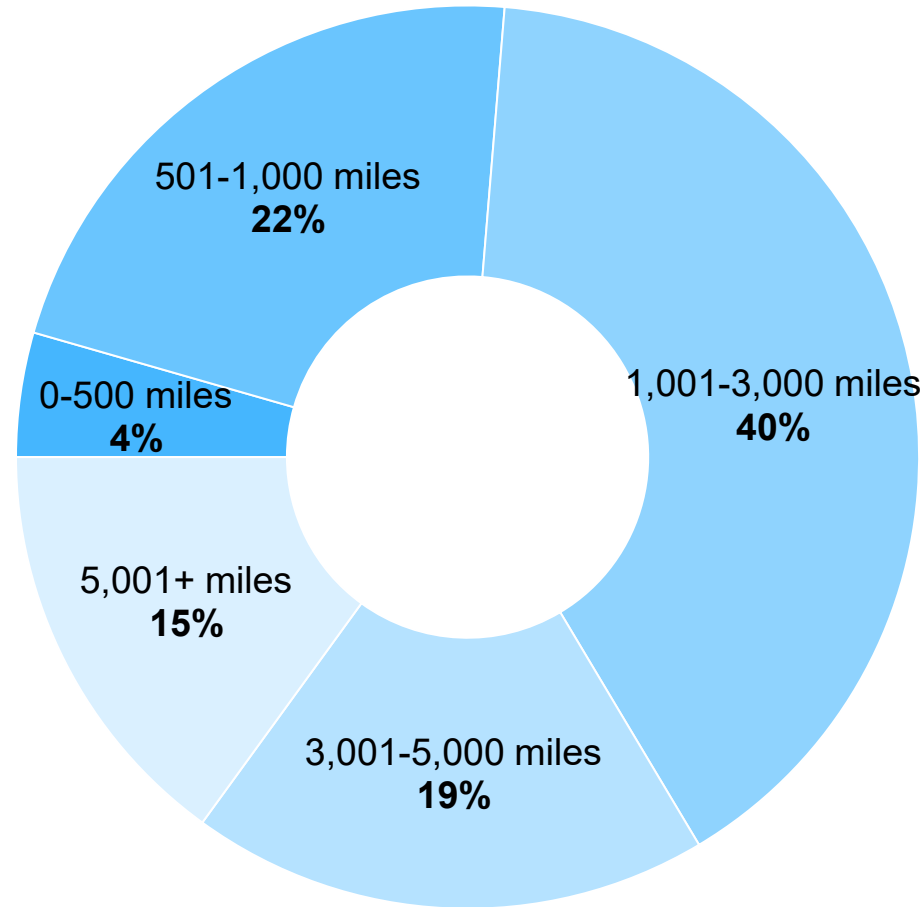
n=84

n=546

n=1,923

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

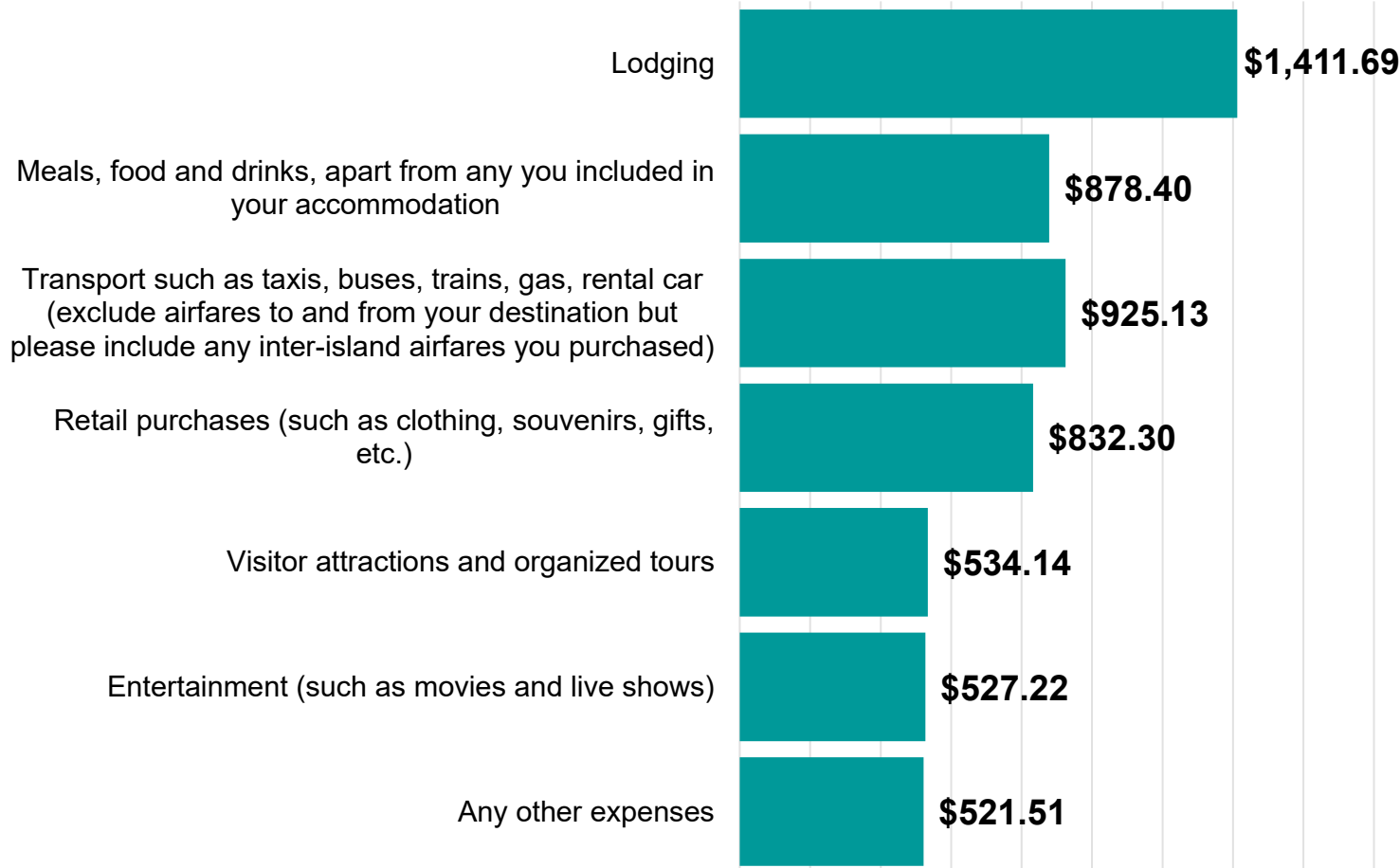
Distance Travelled on Annual Vacation



Sample Size: n=237

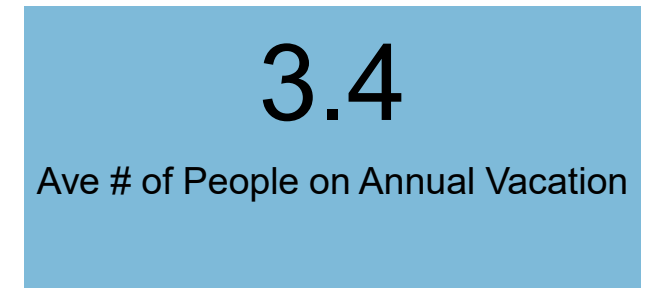
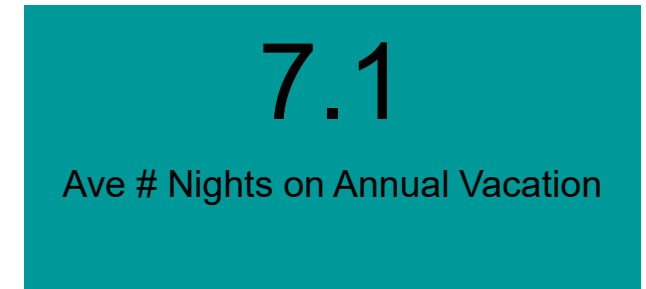
U.S. Avid Travelers \$100k+: Annual Vacation

Average Spend



Sample Size: n=237

Spend Per Person Per Day

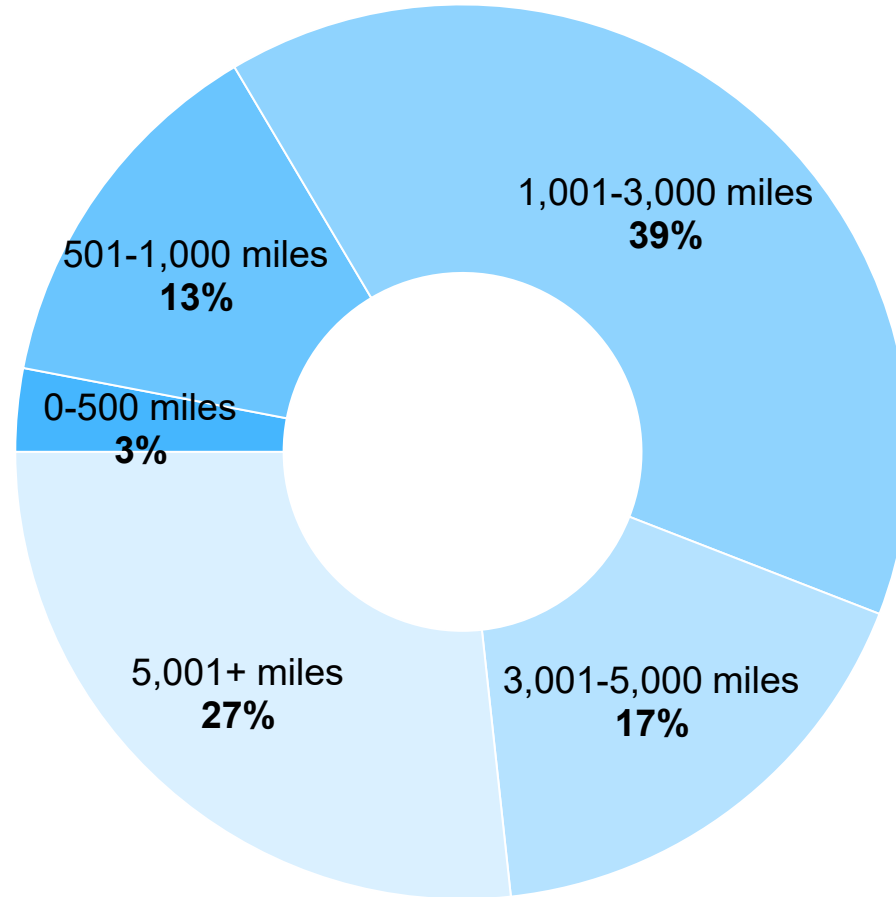


\$237.06

Ave. Per Person Per Day Spend

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

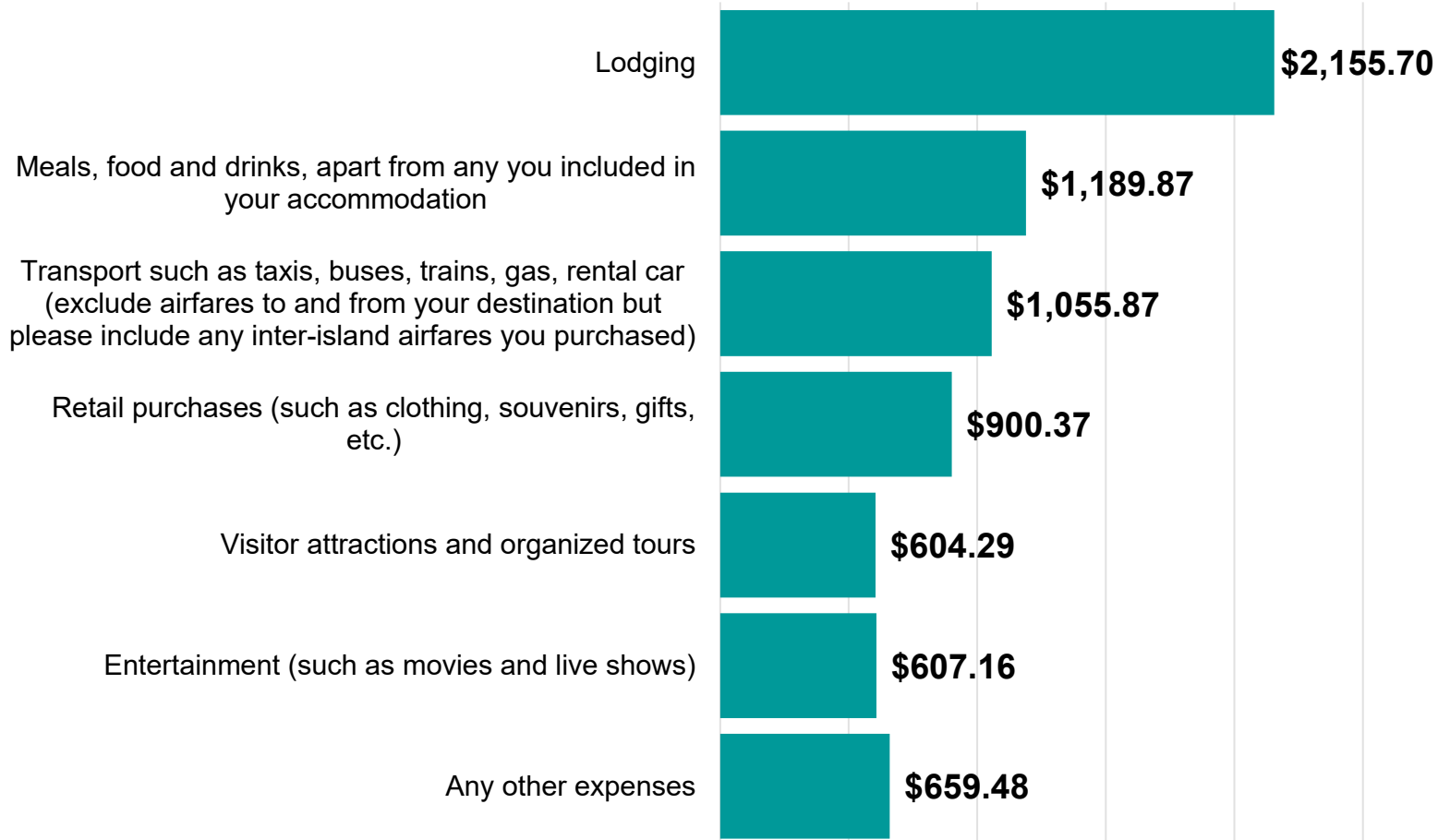
Distance Travelled on Annual Vacation



Sample Size: n=84

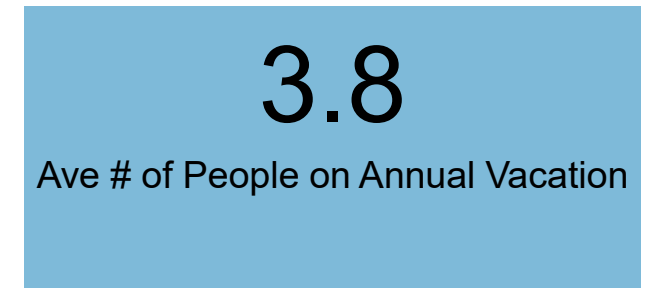
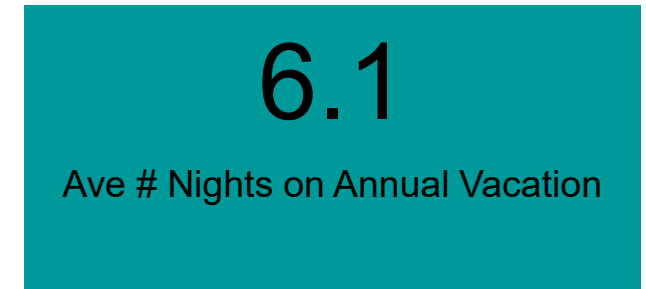
U.S. Avid Travelers \$150k+: Annual Vacation

Average Spend



Sample Size: n=84

Spend Per Person Per Day

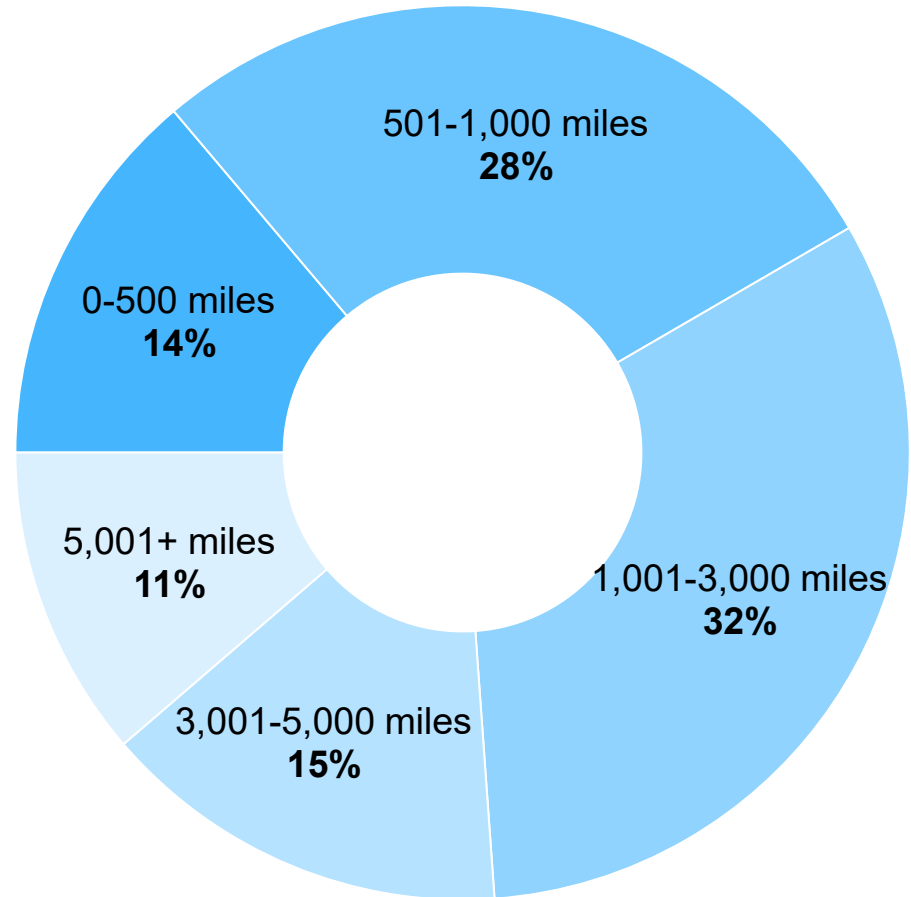


\$309.77

Ave. Per Person Per Day Spend

U.S. Long-Distance Travelers: Annual Vacation

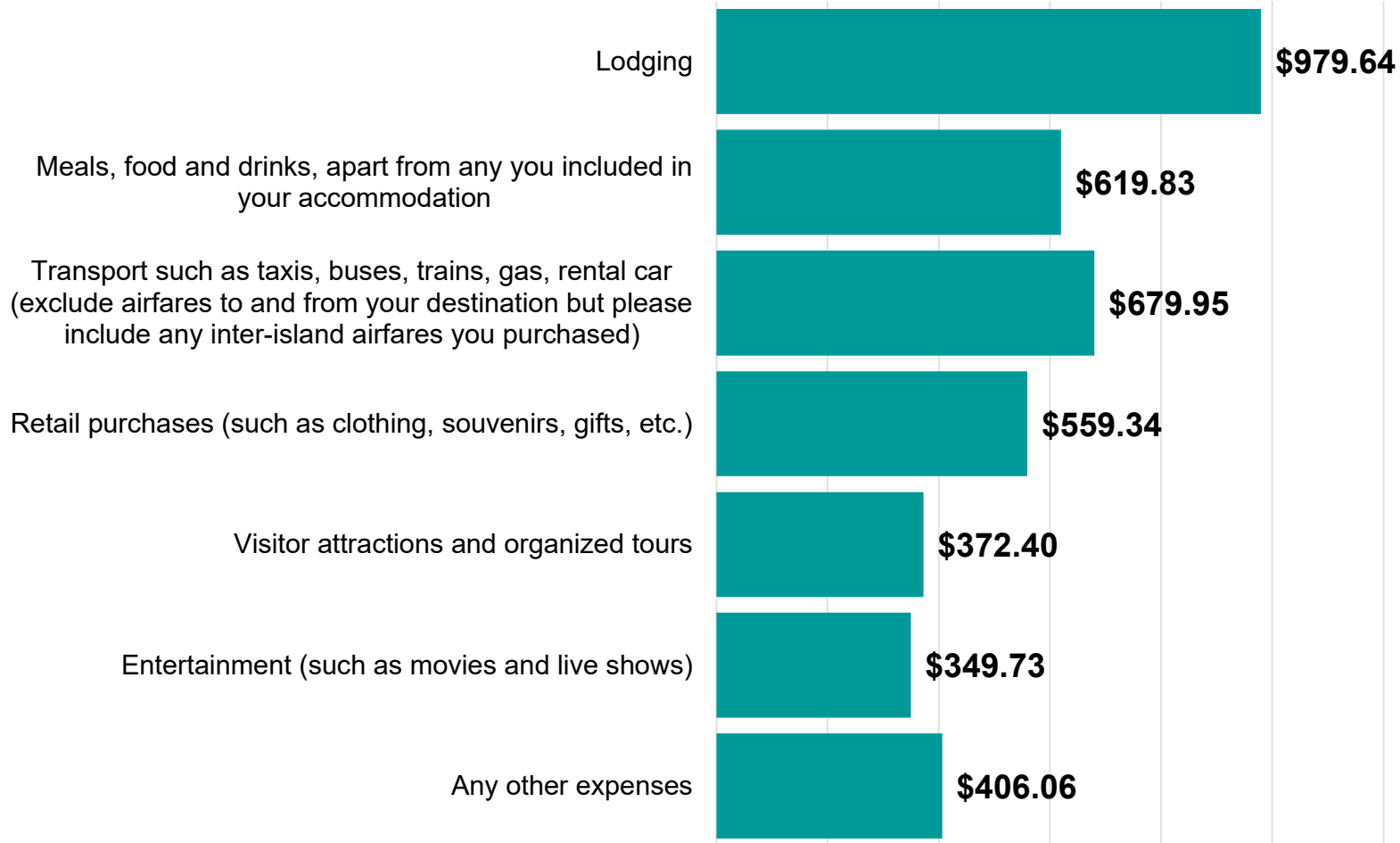
Distance Travelled on Annual Vacation



Sample Size: n=546

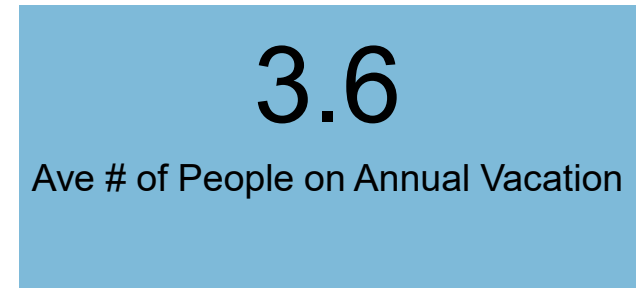
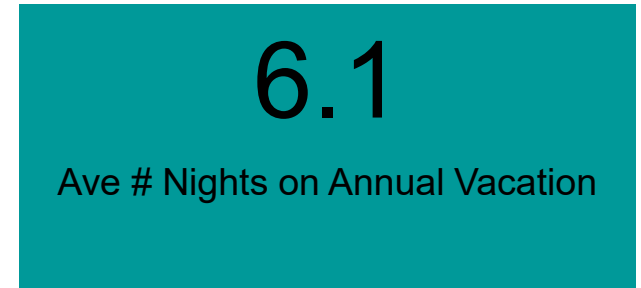
U.S. Long-Distance Travelers: Annual Vacation

Average Spend



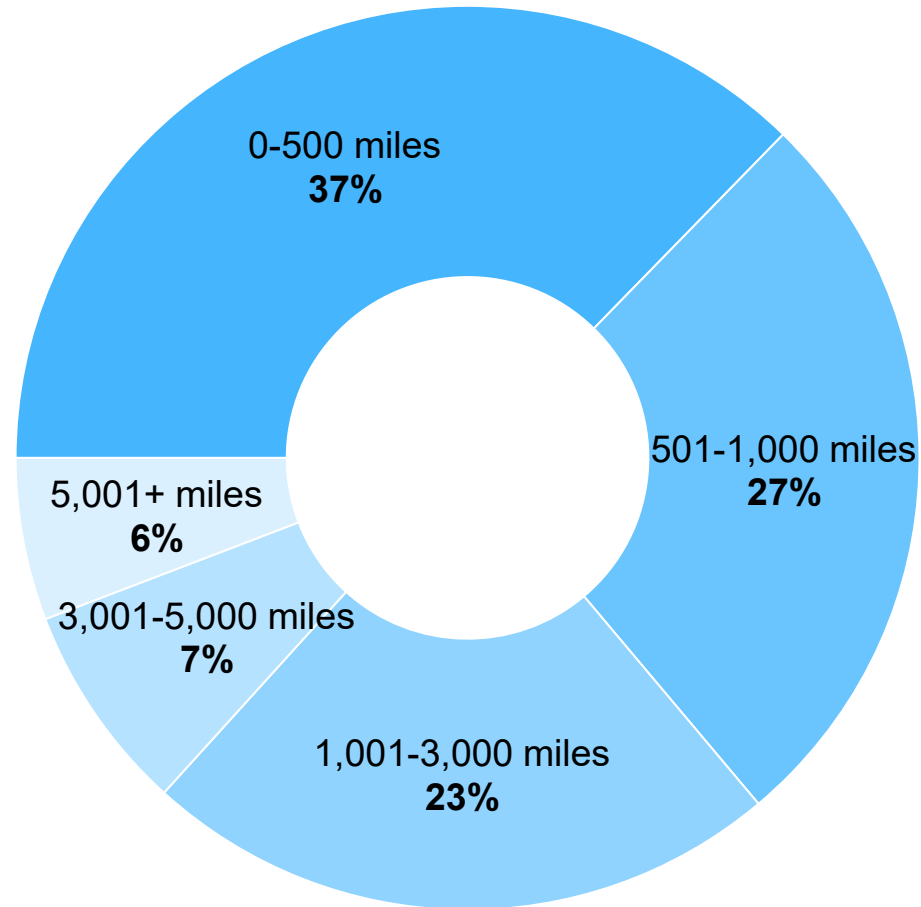
Sample Size: n=546

Spend Per Person Per Day



U.S. Nat Rep: Annual Vacation

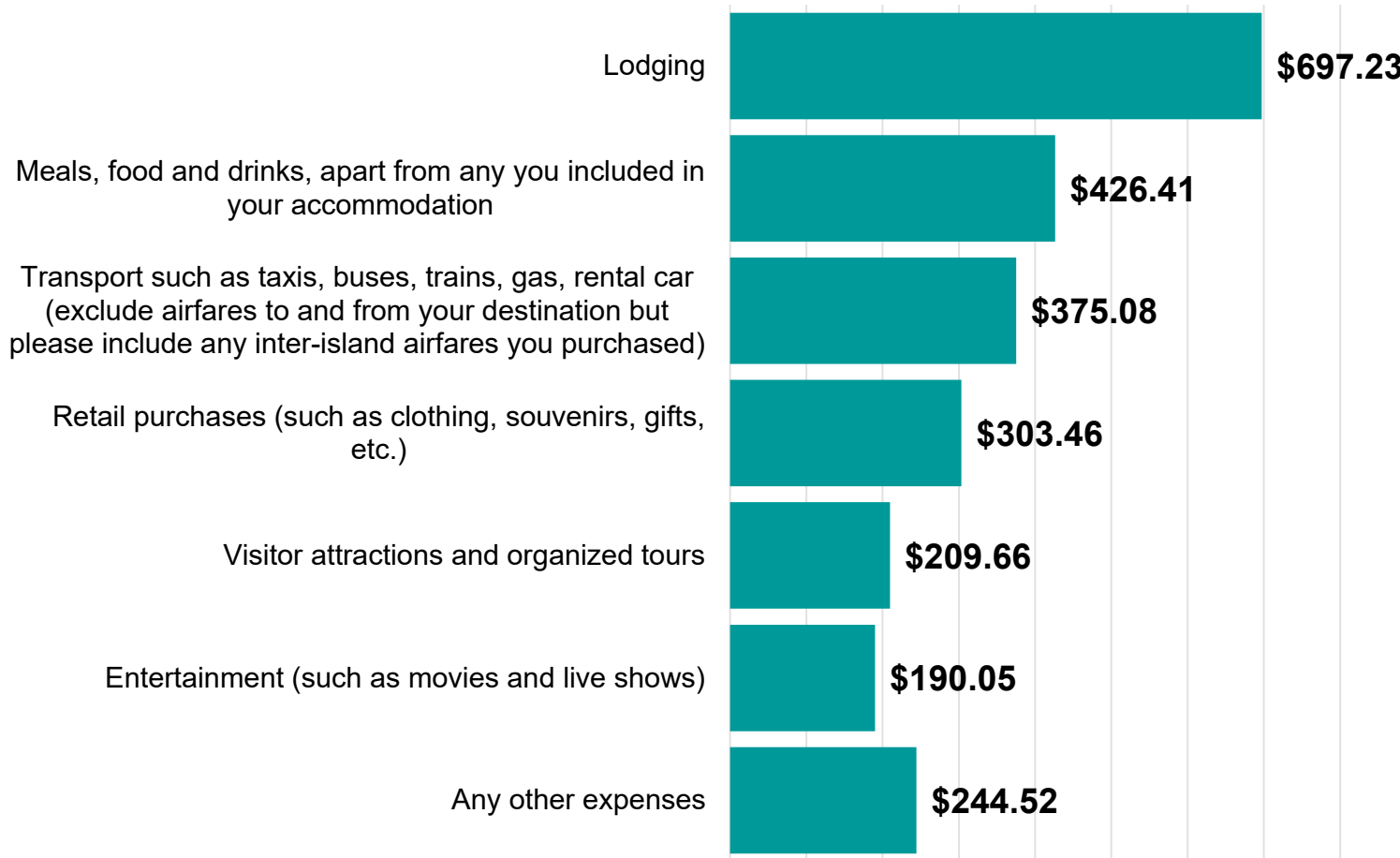
Distance Travelled on Annual Vacation



Sample Size: n=1,923

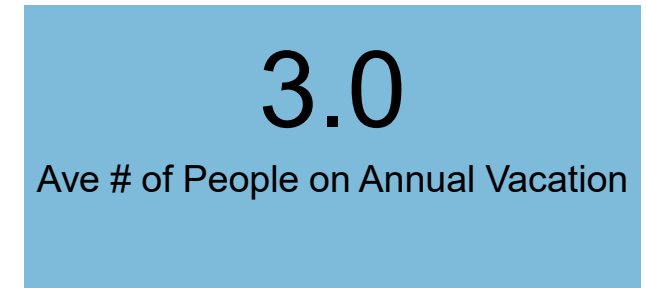
U.S. Nat Rep: Annual Vacation

Average Spend



Sample Size: n=1,923

Spend Per Person Per Day



\$156.21

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	54%	58%	53%	51%
Value for money	56%	55%	55%	57%
Entertainment and nightlife	43%	41%	39%	29%
Consideration of sustainable principles	41%	41%	38%	27%
Natural attractions/activities	46%	46%	47%	43%
Cultural attractions	52%	55%	47%	37%
Opportunity to experience local restaurants/businesses	45%	46%	46%	40%
Family-friendly location and activities	47%	48%	45%	40%
Safe and Secure Destination	58%	63%	59%	63%

Sample Size:

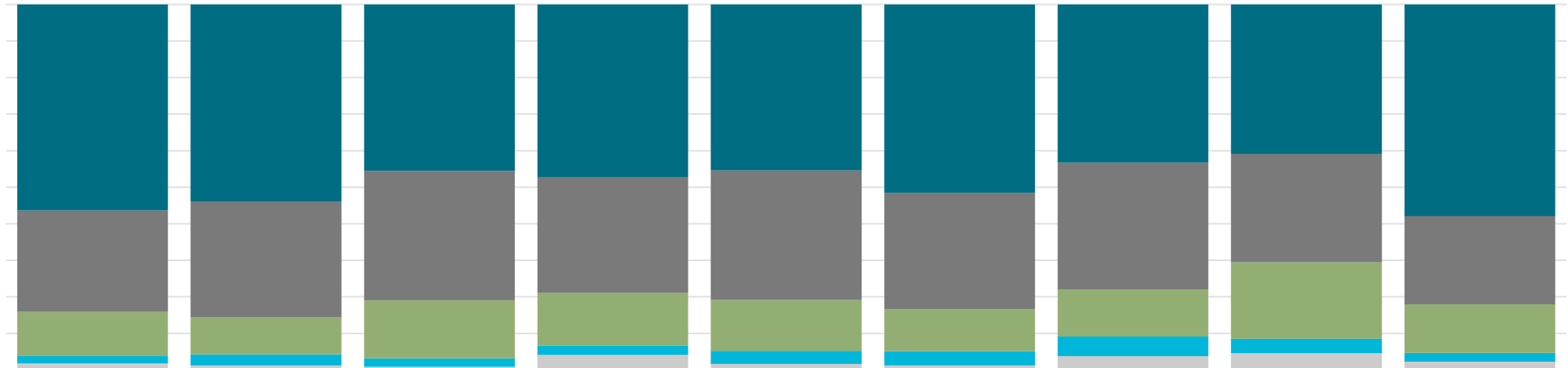
n=237

n=84

n=546

n=1,923

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

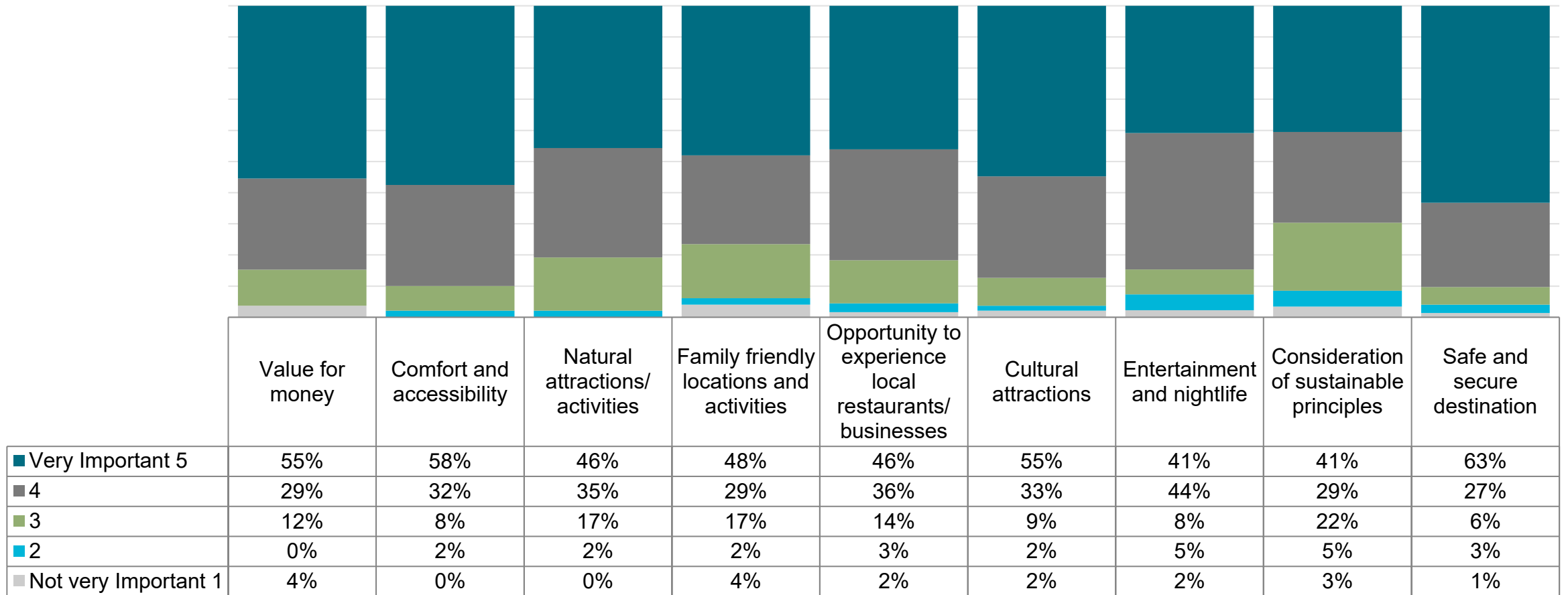


	Value for money	Comfort and accessibility	Natural attractions/activities	Family friendly locations and activities	Opportunity to experience local restaurants/businesses	Cultural attractions	Entertainment and nightlife	Consideration of sustainable principles	Safe and secure destination
Very Important 5	56%	54%	46%	47%	45%	52%	43%	41%	58%
4	28%	32%	35%	32%	35%	32%	35%	30%	24%
3	12%	10%	16%	14%	14%	11%	13%	21%	13%
2	2%	3%	2%	2%	4%	4%	5%	4%	2%
Not very Important 1	2%	1%	1%	4%	2%	1%	4%	5%	2%

Not very Important 1
 2
 3
 4
 Very Important 5

Sample Size: n=237

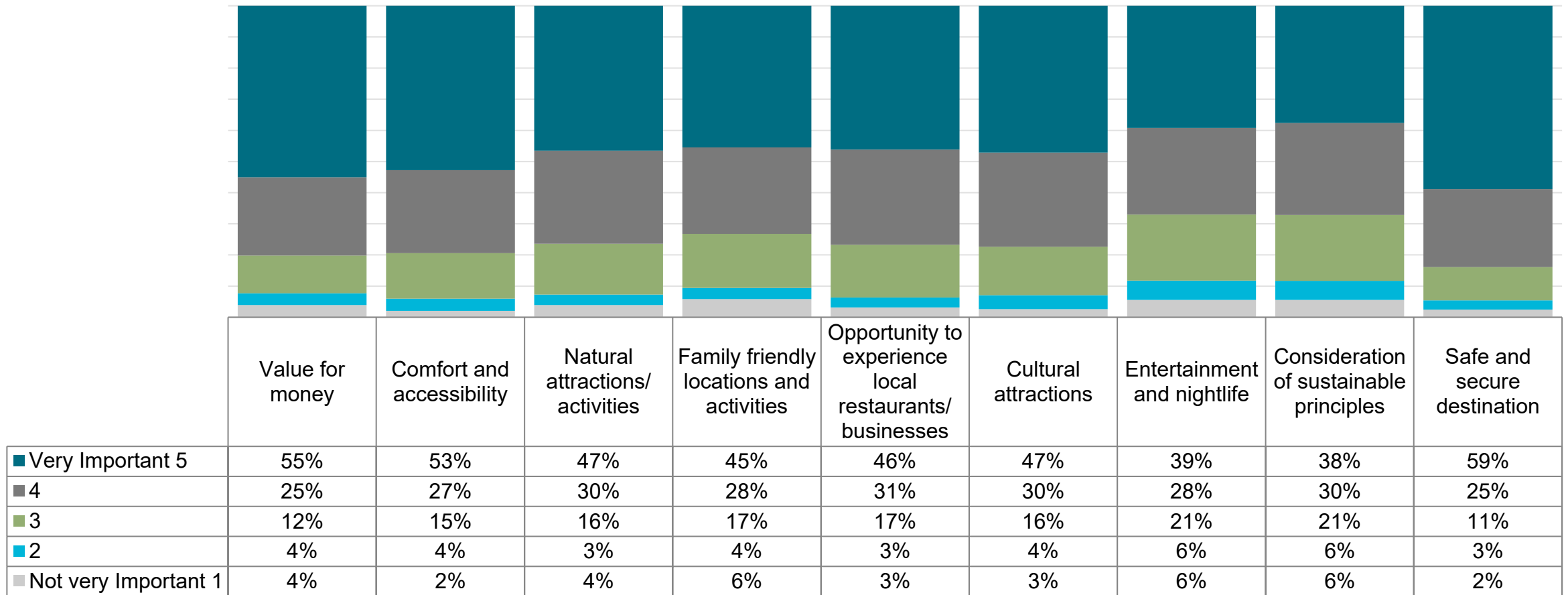
U.S. Avid Travelers \$150k+: Importance of Travel Factors



Not very Important 1
 2
 3
 4
 Very Important 5

Sample Size: n=84

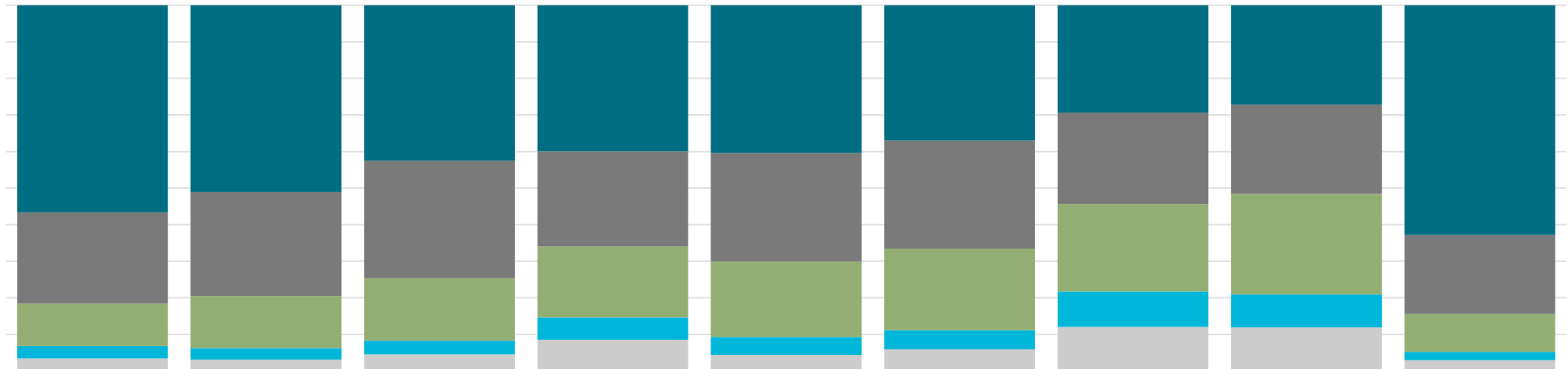
U.S. Long Distance Travelers: Importance of Travel Factors



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

Sample Size: n=546

U.S. Nat Rep: Importance of Travel Factors



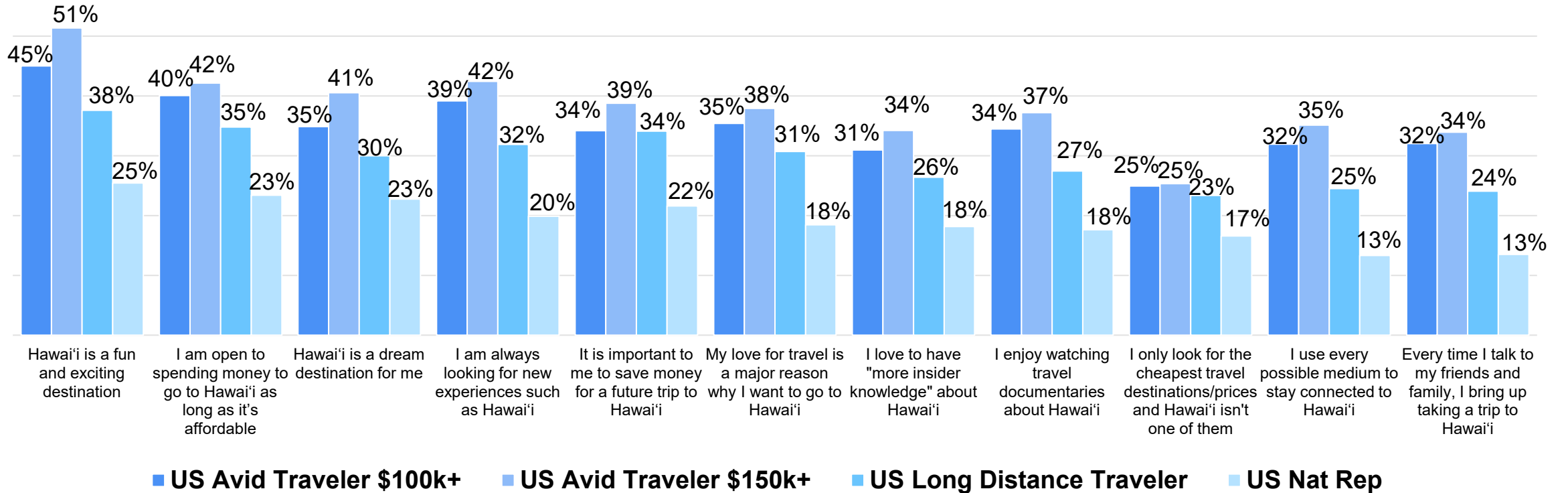
	Value for money	Comfort and accessibility	Natural attractions/activities	Family friendly locations and activities	Opportunity to experience local restaurants/businesses	Cultural attractions	Entertainment and nightlife	Consideration of sustainable principles	Safe and secure destination
Very Important 5	57%	51%	43%	40%	40%	37%	29%	27%	63%
4	25%	28%	32%	26%	30%	30%	25%	24%	22%
3	12%	14%	17%	19%	21%	22%	24%	27%	10%
2	3%	3%	4%	6%	5%	5%	10%	9%	2%
Not very Important 1	3%	3%	4%	9%	4%	6%	12%	12%	3%

Not very Important 1
 2
 3
 4
 Very Important 5

Sample Size: n=1,923

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

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



Sample Size:

n=237

n=84

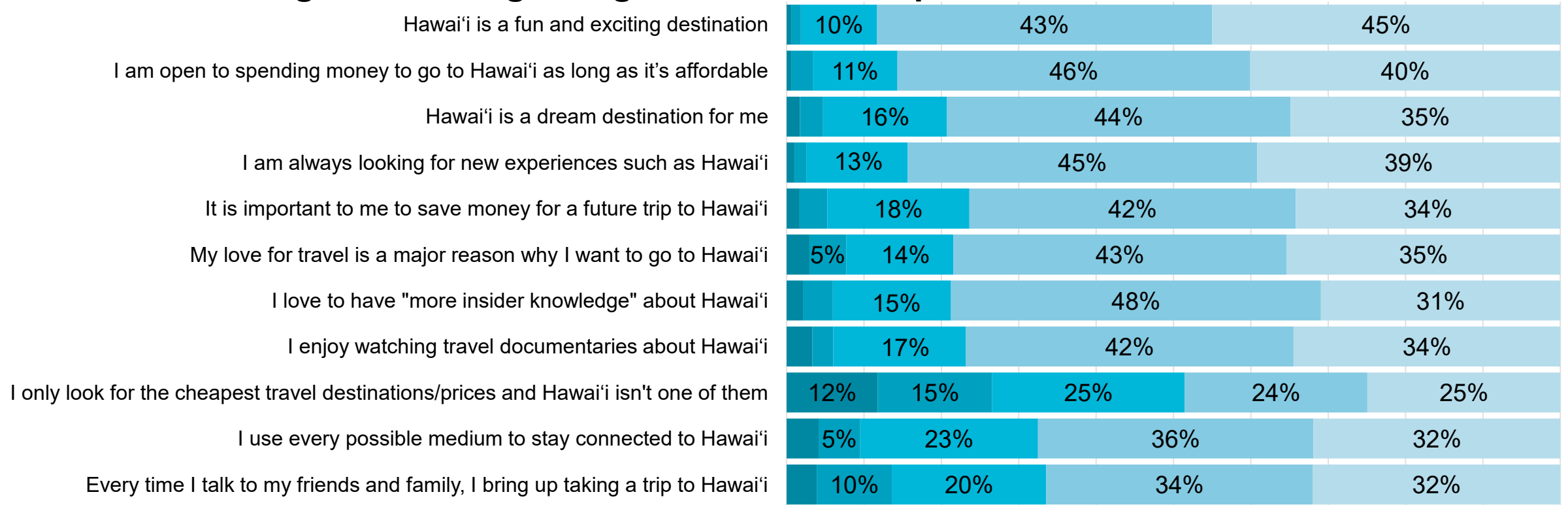
n=546

n=1,923

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

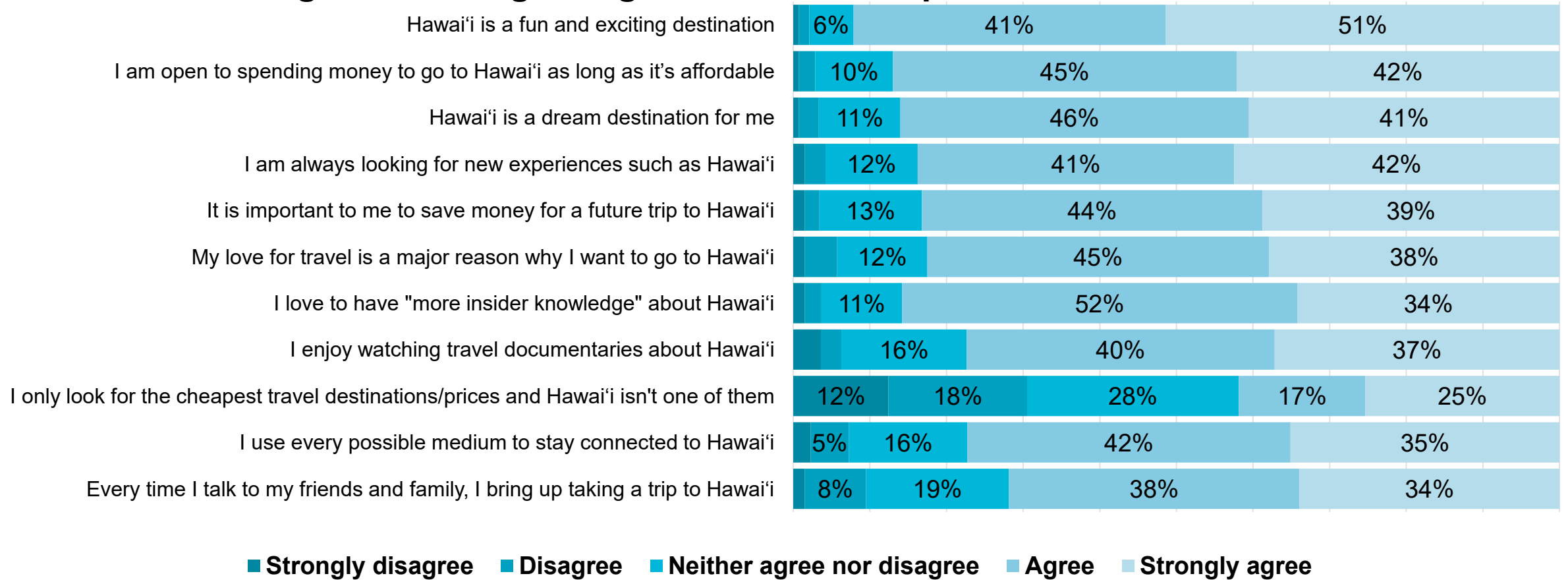


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=237

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

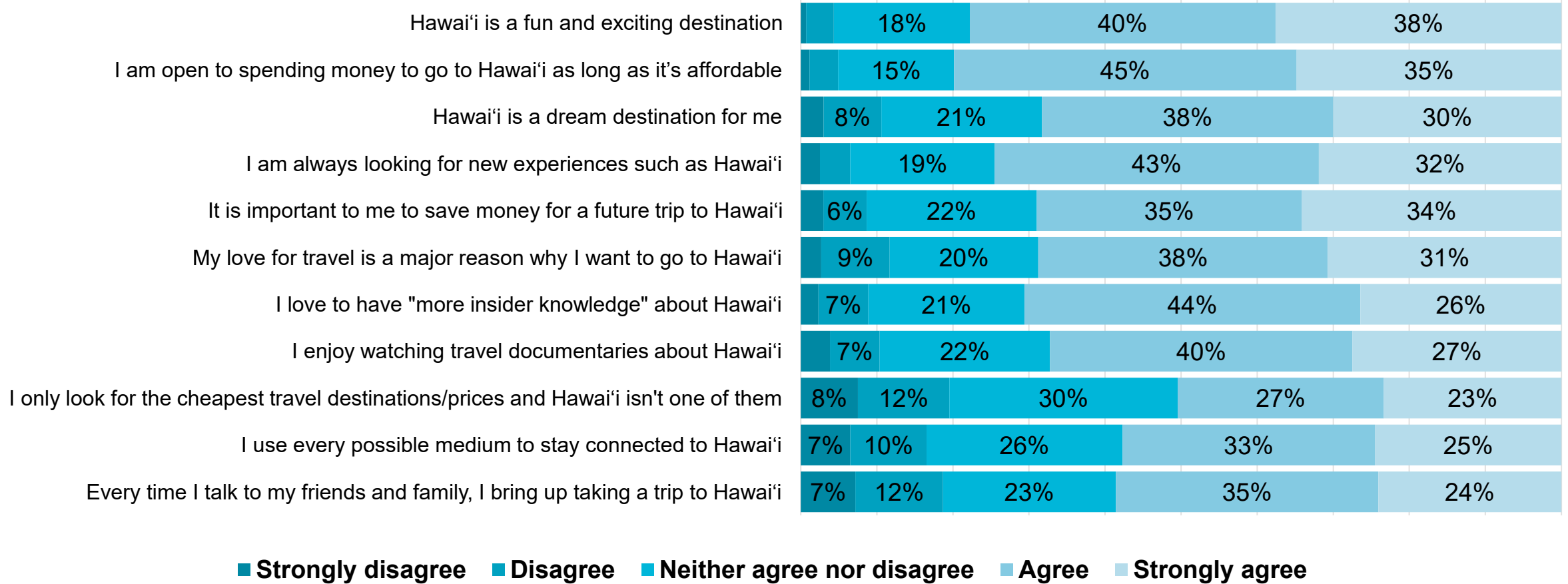
Agreement Regarding Hawai'i as an Aspirational Destination



Sample Size: n=84

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

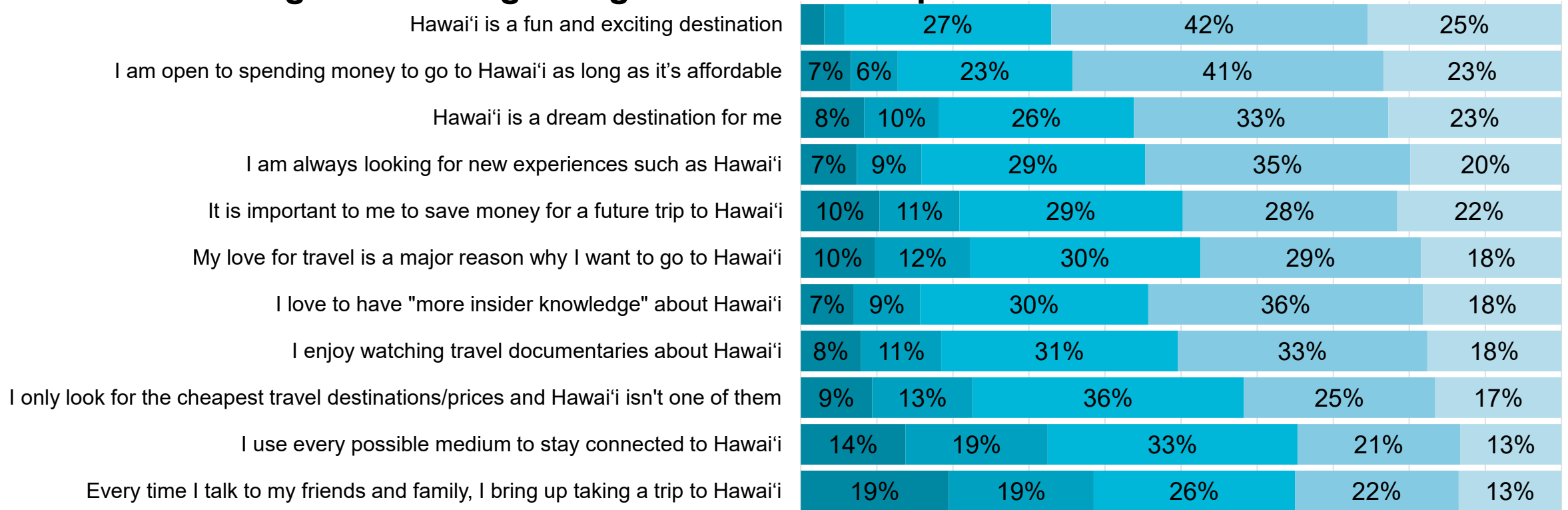
Agreement Regarding Hawai'i as an Aspirational Destination



Sample Size: n=546

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

Agreement Regarding Hawai'i as an Aspirational Destination

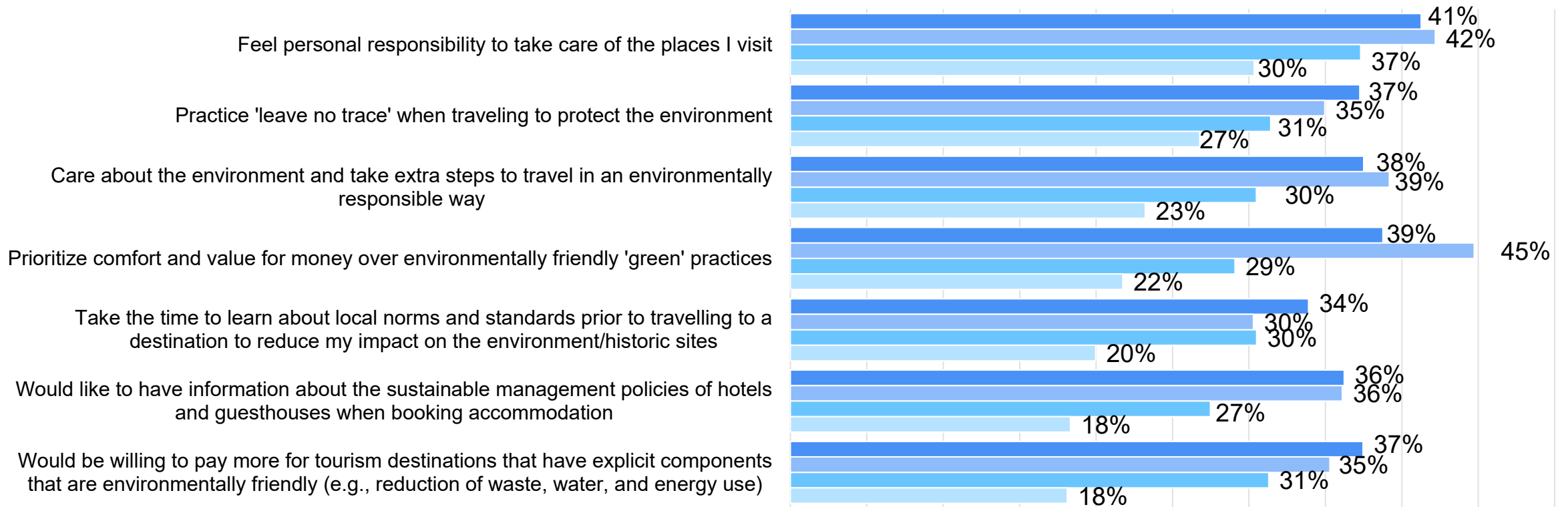


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=1,923

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=237

n=84

n=546

n=1,923

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=237

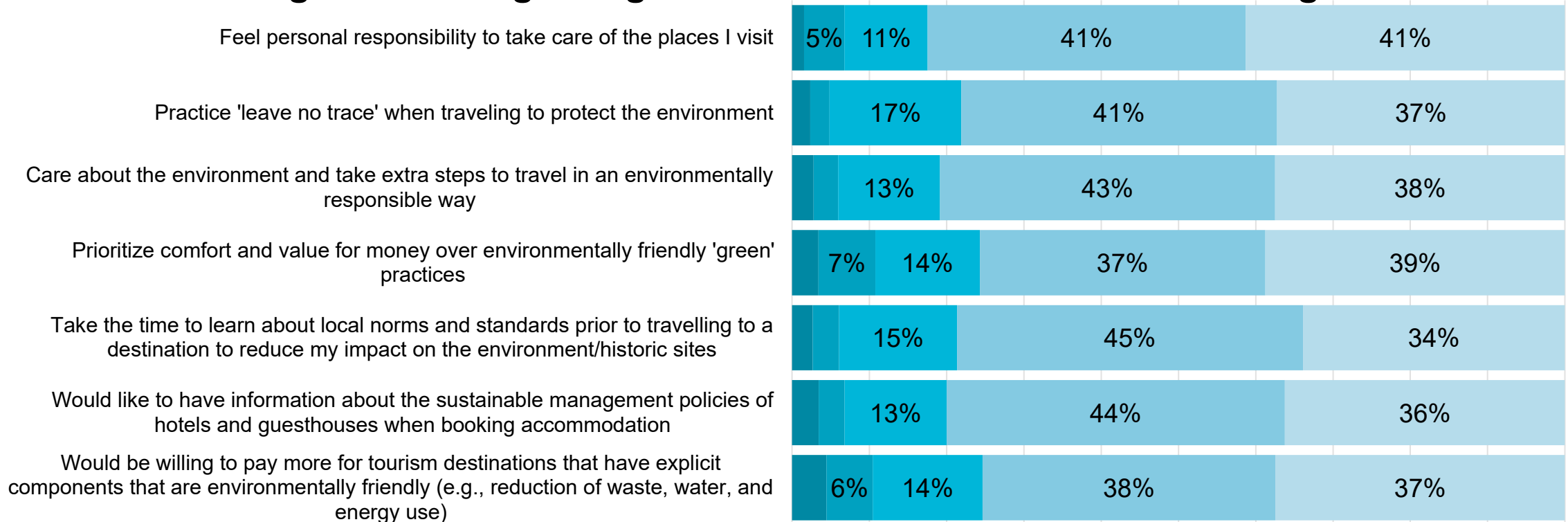
n=84

n=546

n=1,923

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=237

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

Agreement Regarding Sustaining Local Culture While Traveling

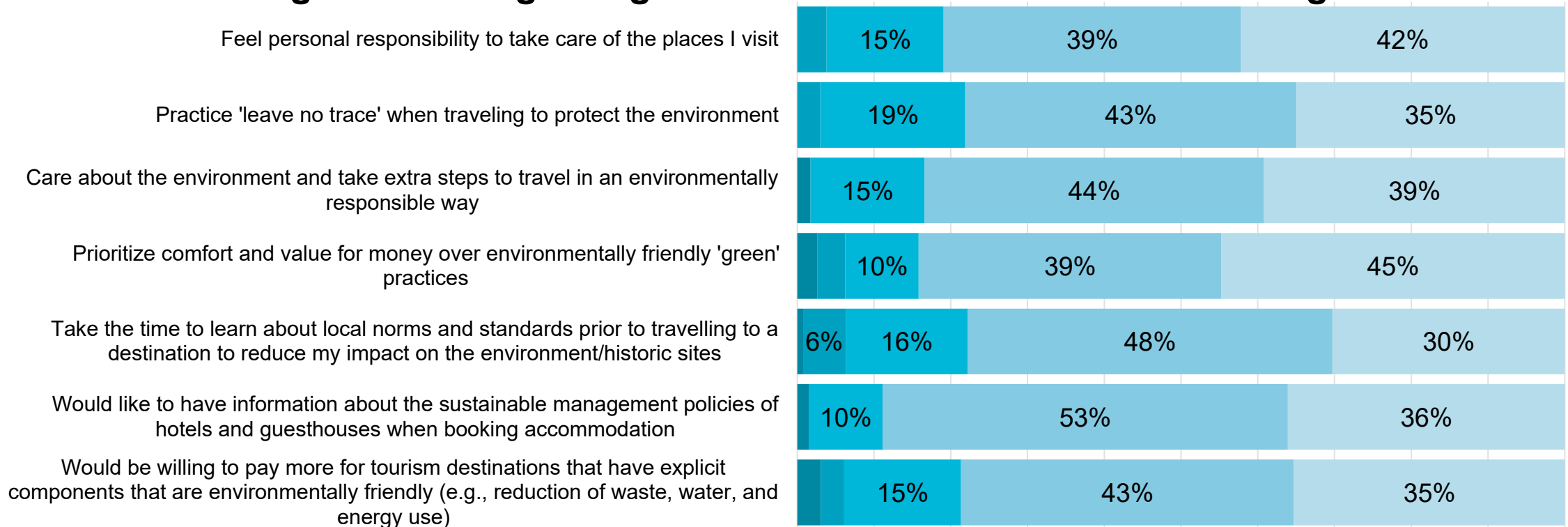


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=237

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

Agreement Regarding Sustainable Practices While Traveling

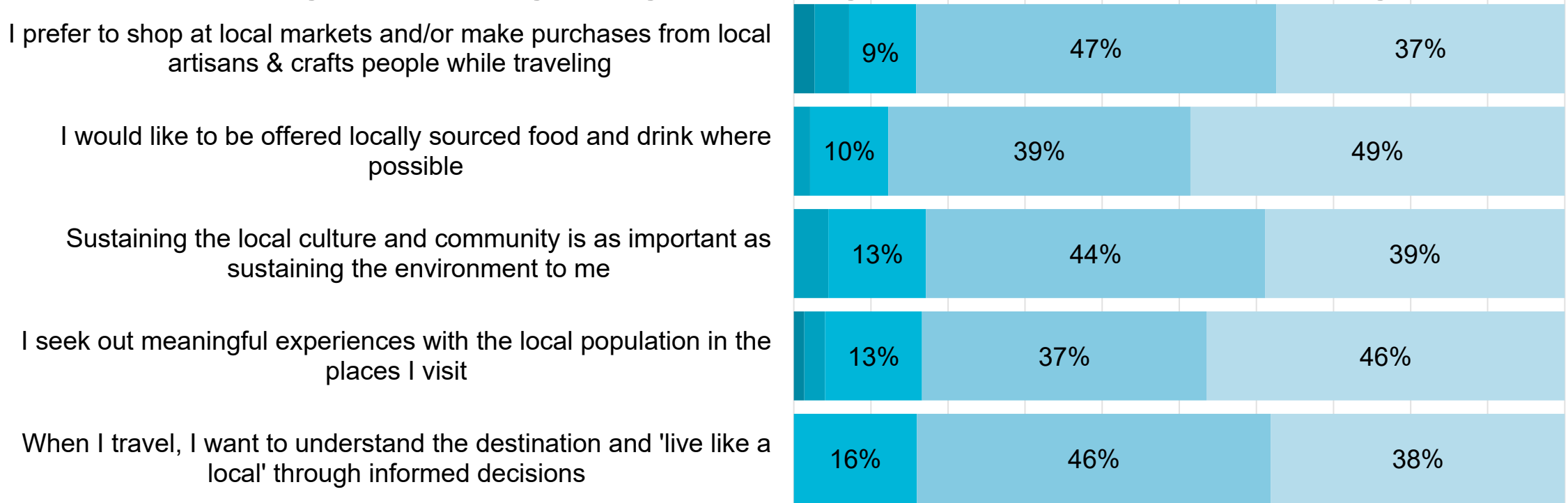


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=84

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

Agreement Regarding Sustaining Local Culture While Traveling

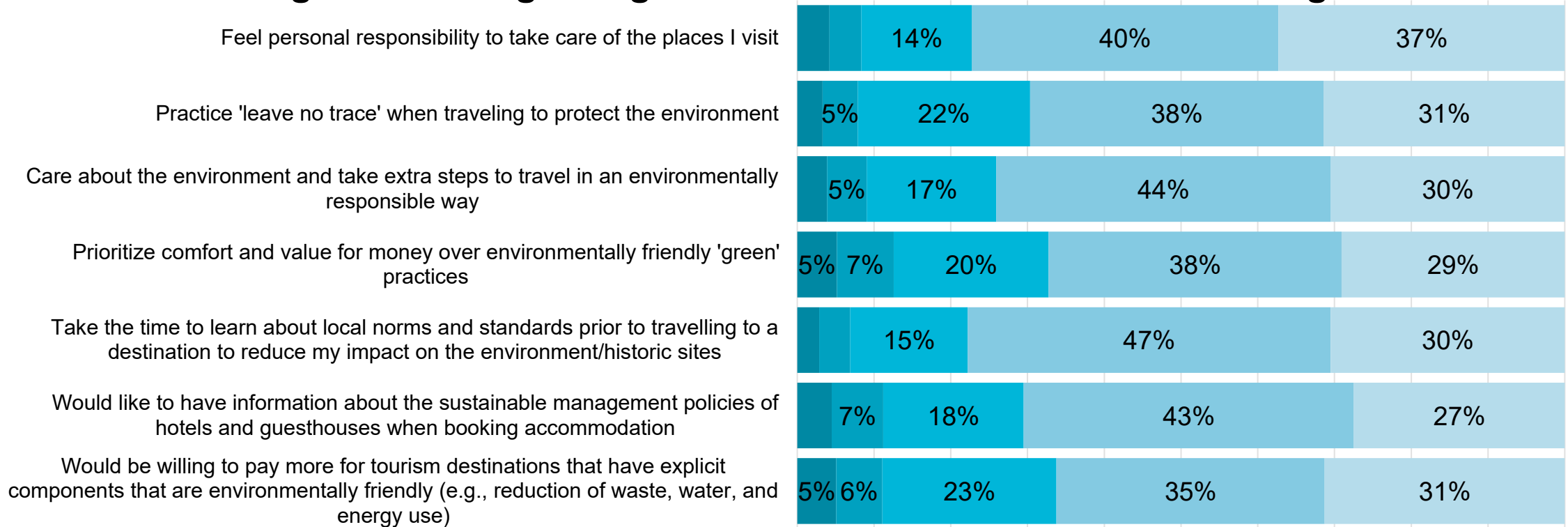


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=84

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=546

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

Agreement Regarding Sustaining Local Culture While Traveling

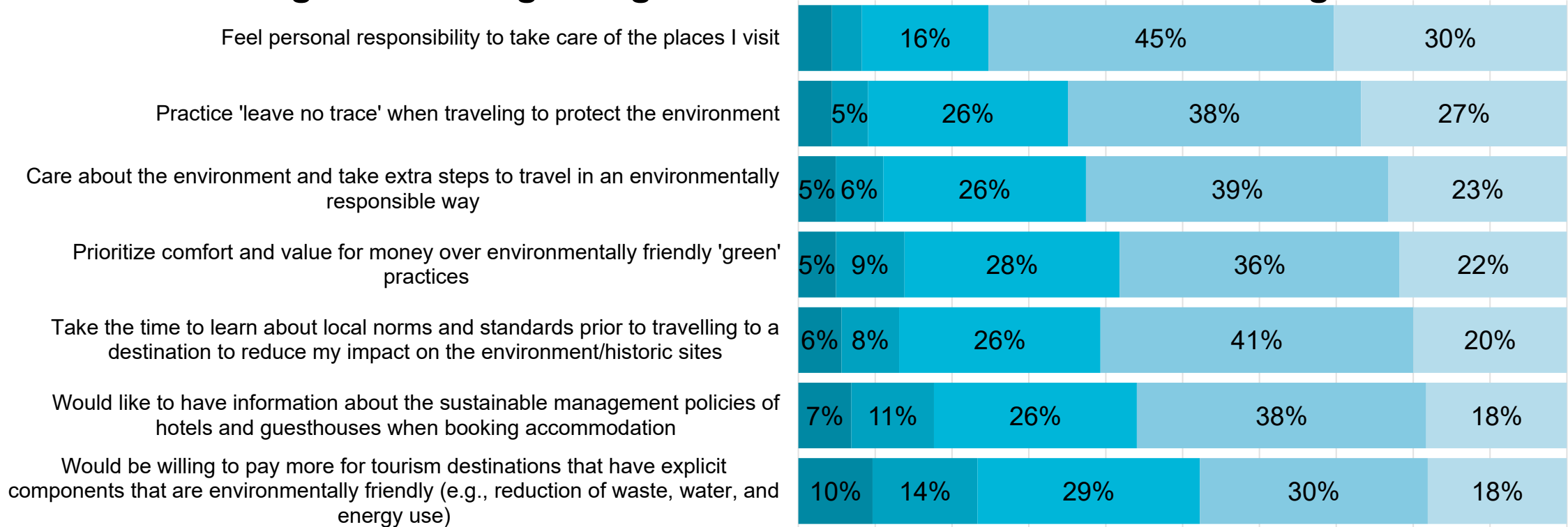


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=546

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

Agreement Regarding Sustainable Practices While Traveling

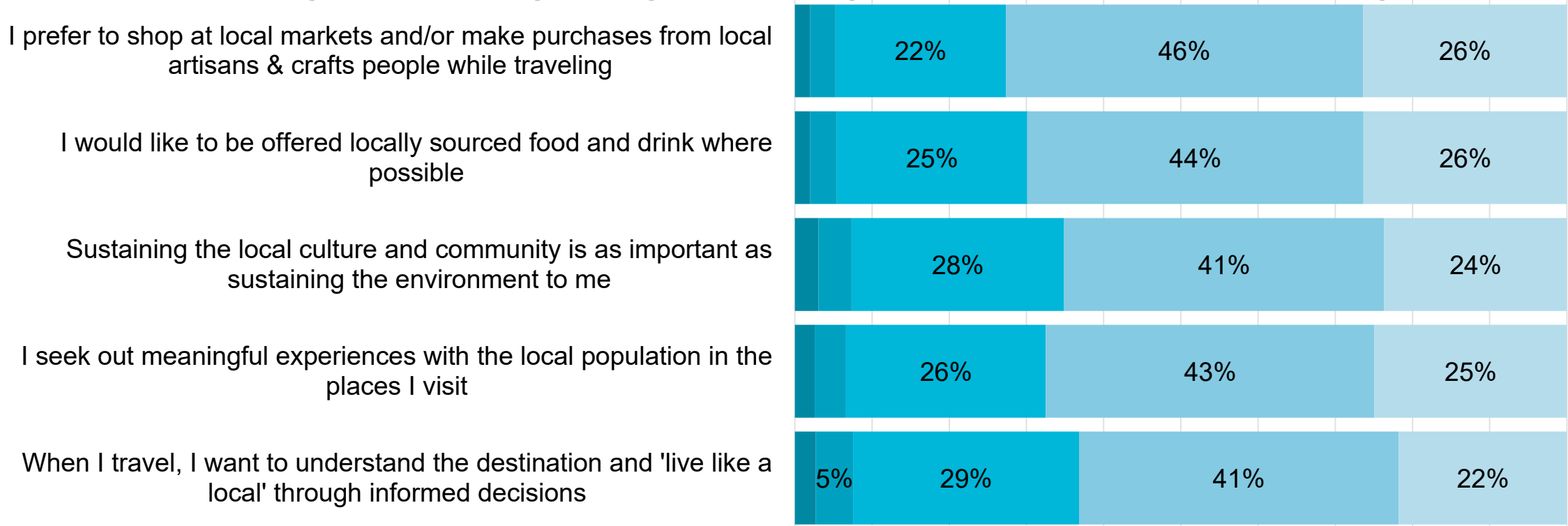


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=1,923

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

Agreement Regarding Sustaining Local Culture While Traveling

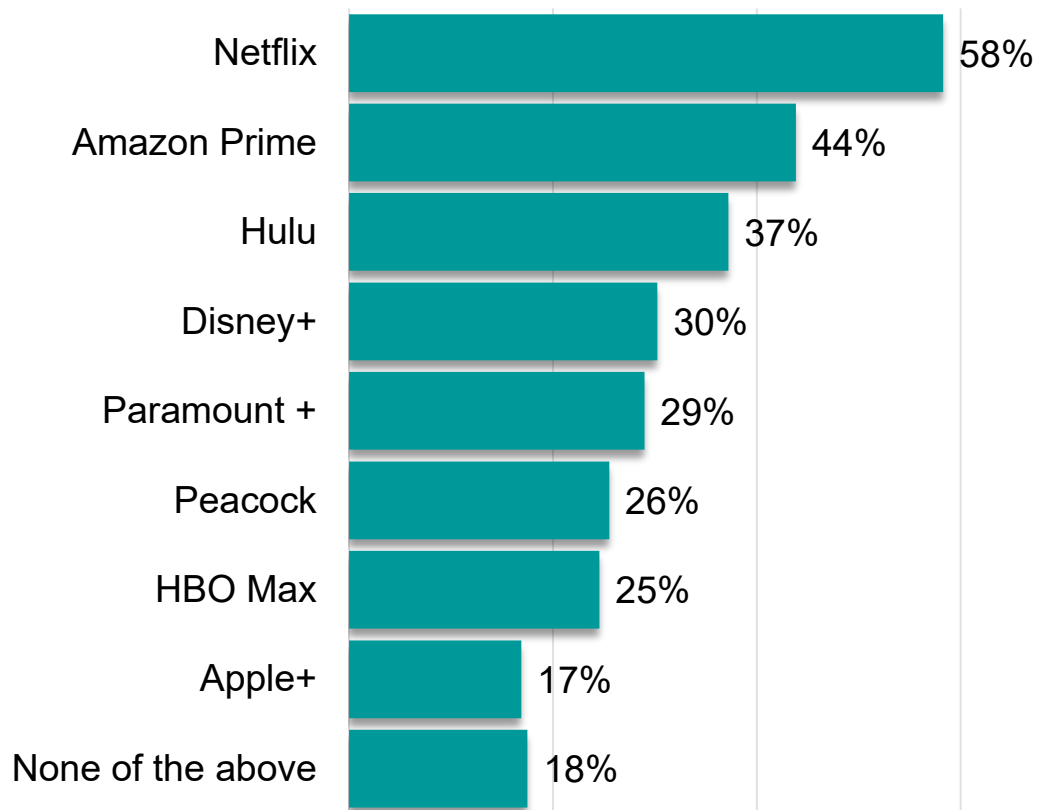


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

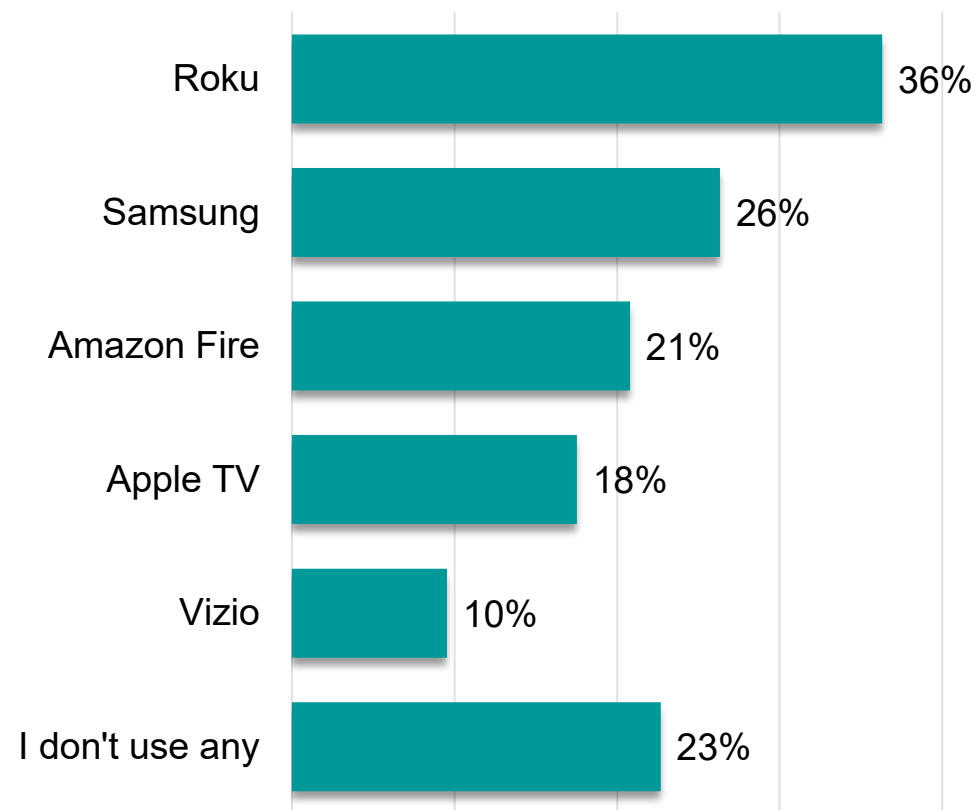
Sample Size: n=1,923

U.S. Media Consumption

Streaming Platforms Used Weekly



Connected Device Used

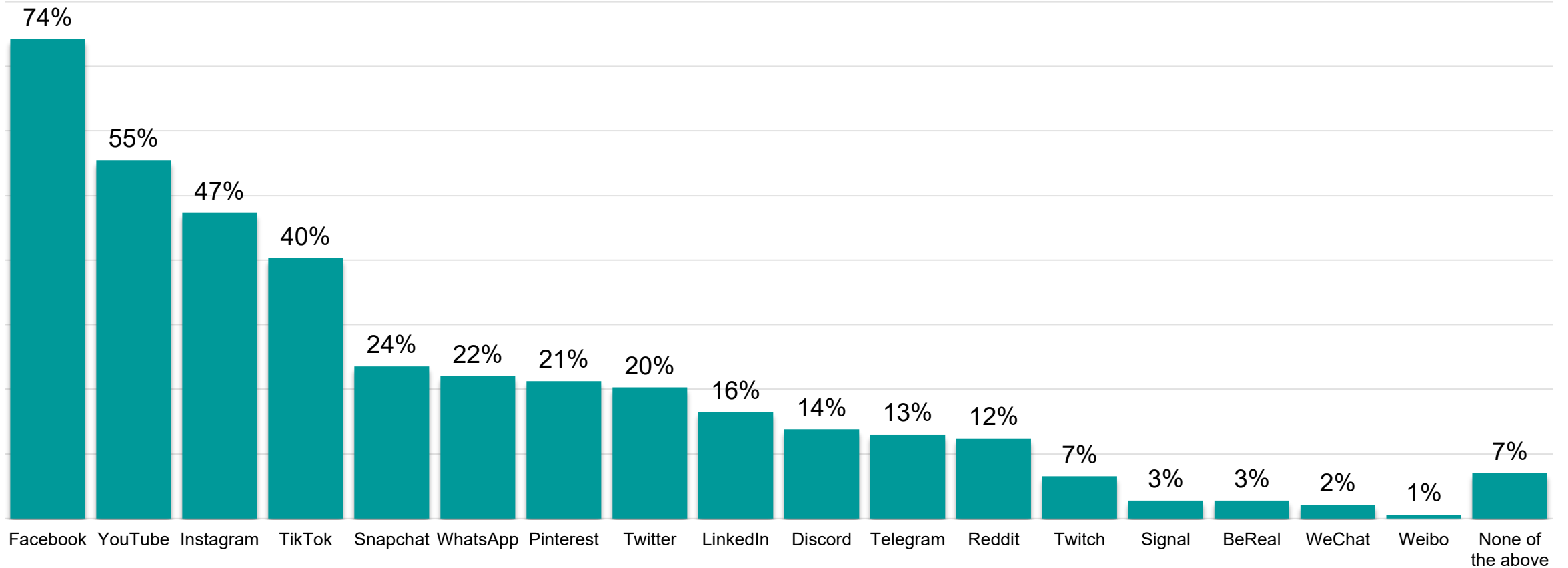


Sample Size: n=1,923

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=1,923

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	43%
TV commercials	27%
YouTube	34%
TV Program/Documentary	20%
Email	16%
Radio	8%
Newspaper	9%
Out of home advertising (e.g. Poster Billboards, bus shelter advertisements, etc.)	9%
I don't recall	13%

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	29%
I look up the destination on social media	27%
I book travel to the destination almost immediately	10%
I don't do anything	18%
None of the above	8%

Sample Size: n=1,923