



Vision Insights U.S. Traveler Profiles December 2025

February 12, 2026



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
 - Takes international vacations
 - 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

- Takes international vacations
- State of residence is not Hawai'i
- Age 18-54

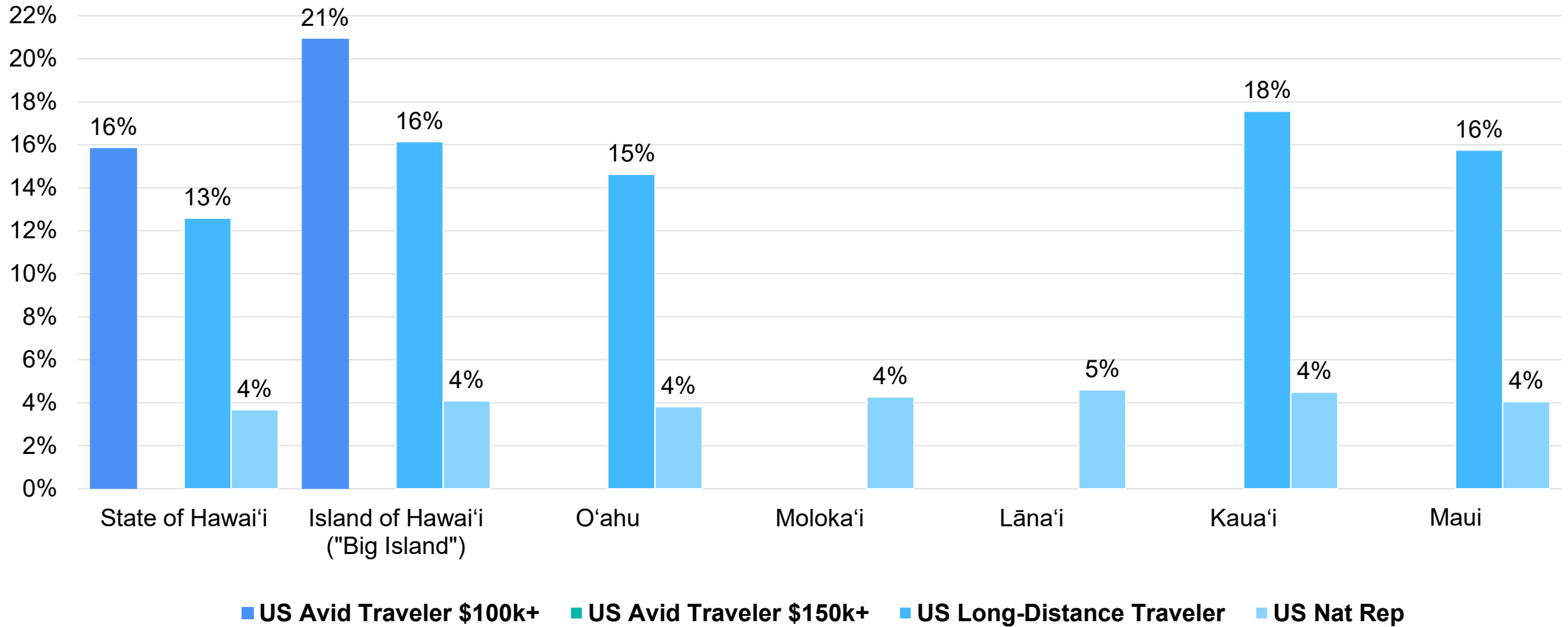
Avid Traveler \$150k+

- 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
 - Takes international vacations
 - 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

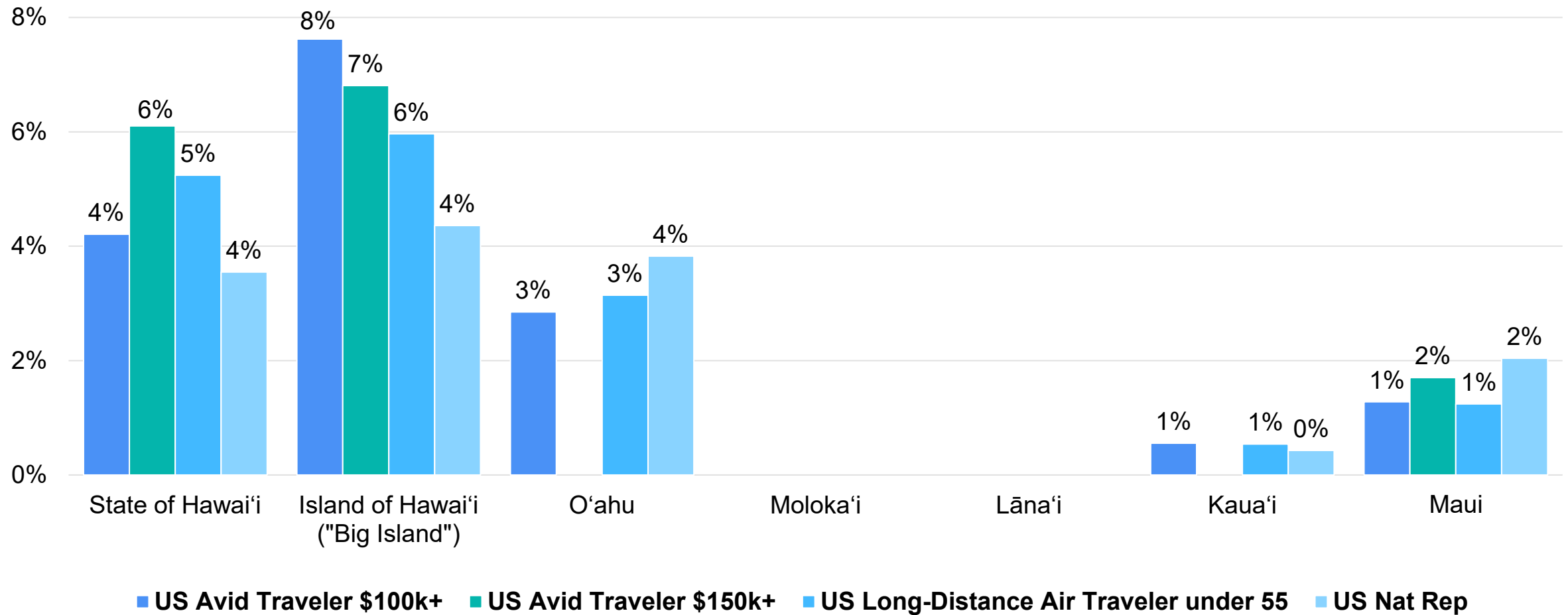
U.S. - Leisure Trip In Past 12 Months



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

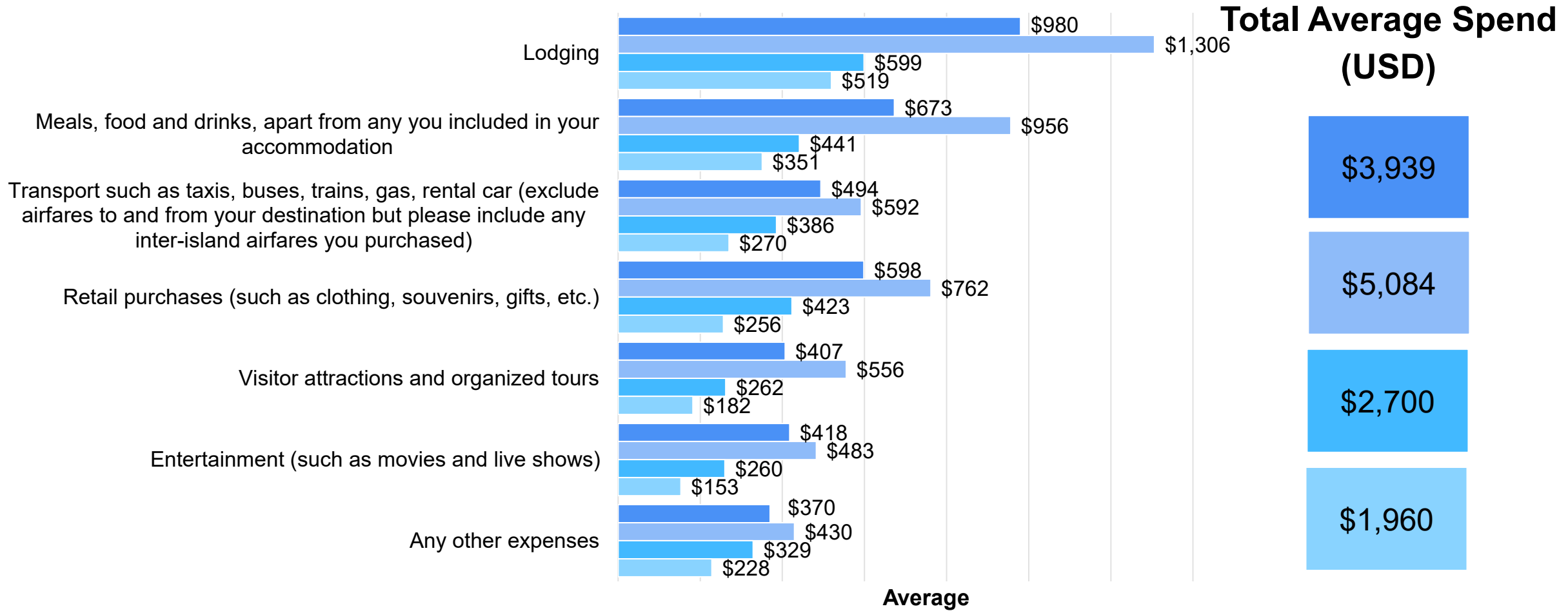


Sample Min. n=75

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 | |
|-------------------------------------|-------|---|-------|--|-------|---------------------|---------|
| | % | | % | | % | | % |
| New York | 30.9% | New York | 35.3% | New York | 14.9% | Florida | 8.9% |
| California | 10.2% | Florida | 13.9% | Florida | 9.6% | Texas | 8.6% |
| Texas | 9.2% | California | 11.3% | Texas | 9.3% | New York | 8.3% |
| Florida | 7.1% | Texas | 8.8% | California | 6.8% | Georgia | 4.7% |
| Georgia | 4.2% | Georgia | 5.4% | Georgia | 4.8% | California | 4.6% |
| Maryland | 3.6% | North Carolina | 5.0% | Pennsylvania | 3.6% | Pennsylvania | 4.6% |
| Massachusetts | 3.2% | South Carolina | 2.8% | North Carolina | 3.6% | North Carolina | 4.4% |
| North Carolina | 3.0% | Mississippi | 2.8% | Illinois | 3.5% | Ohio | 4.1% |
| Illinois | 2.5% | Virginia | 1.7% | Maryland | 3.2% | Illinois | 3.2% |
| Washington | 2.4% | Washington | 1.7% | Mississippi | 3.2% | Michigan | 2.8% |
| Sample Size: | n=163 | Sample Size: | n=58 | Sample Size: | n=428 | Sample Size: | n=1,788 |

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=163

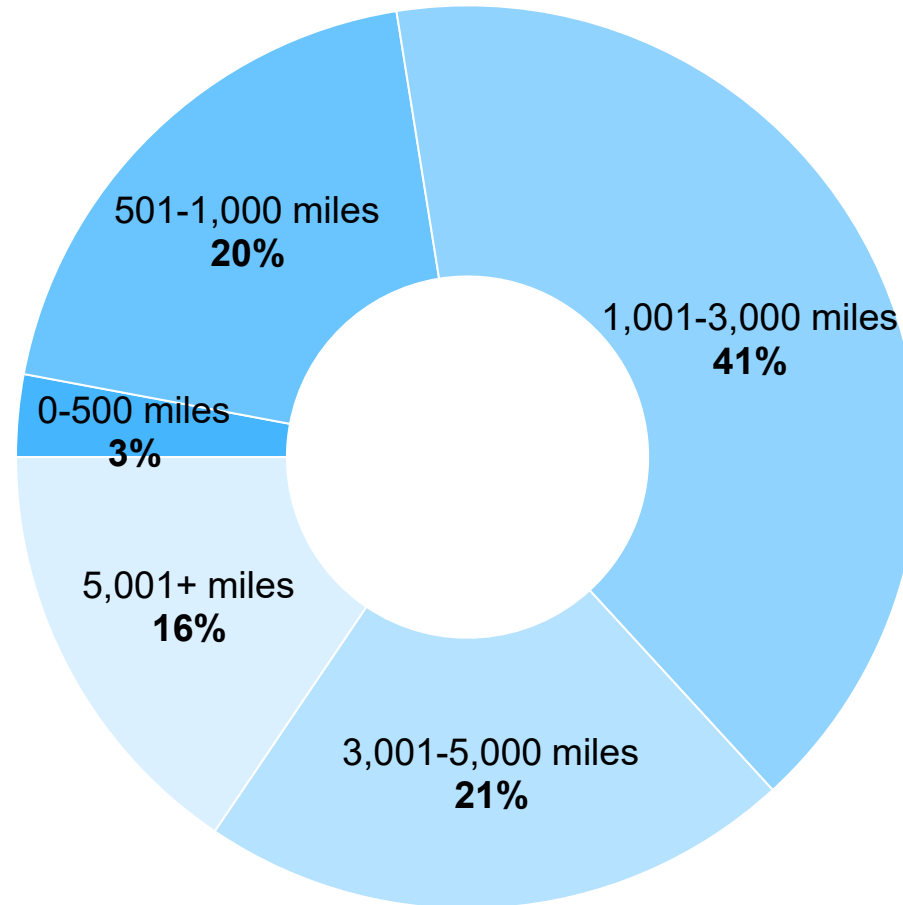
n=58

n=428

n=1,788

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

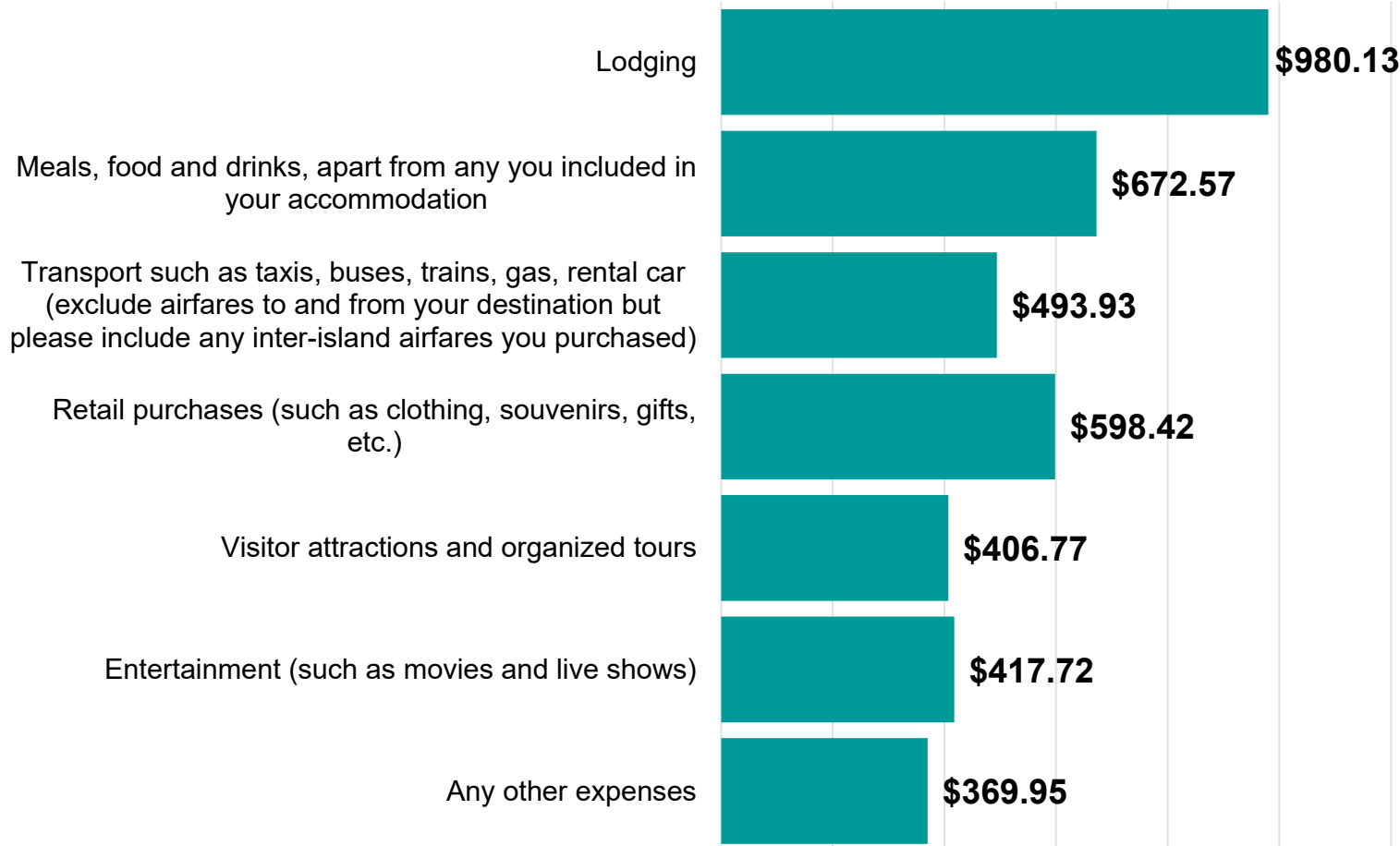
Distance Travelled on Annual Vacation



Sample Size: n=163

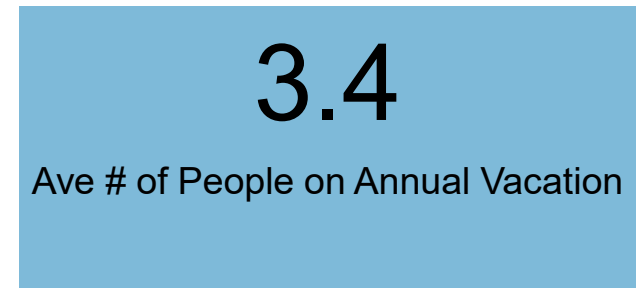
U.S. Avid Travelers \$100k+: Annual Vacation

Average Spend



Sample Size: n=163

Spend Per Person Per Day

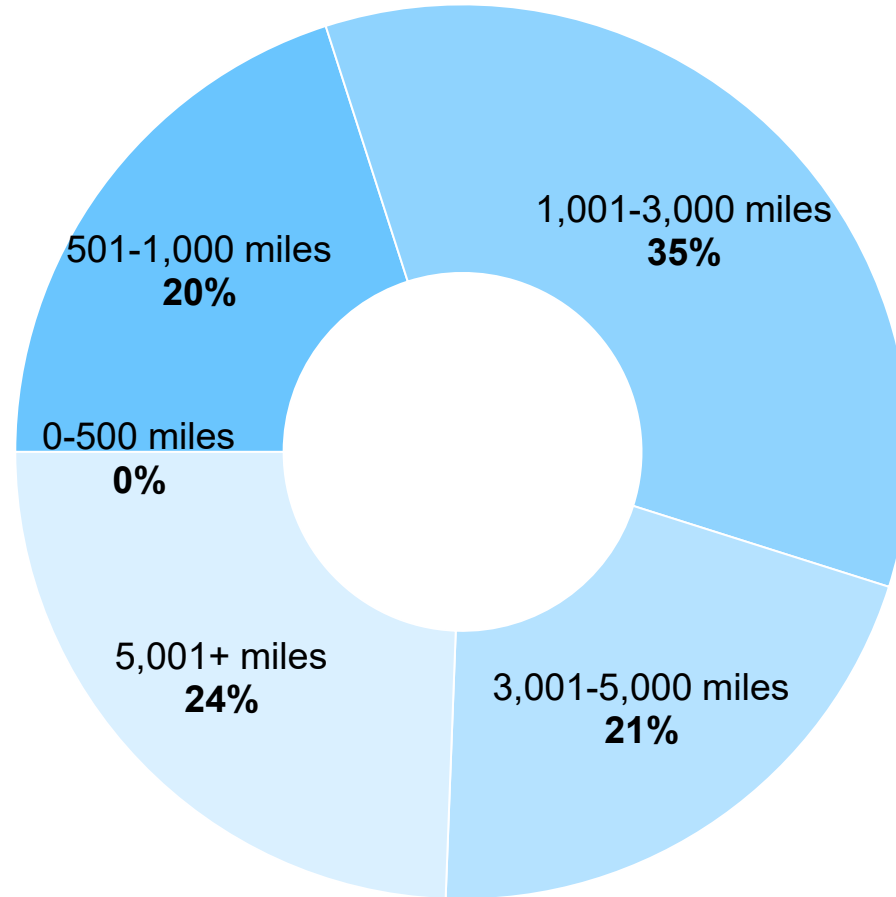


\$217.76

Ave. Per Person Per Day Spend

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

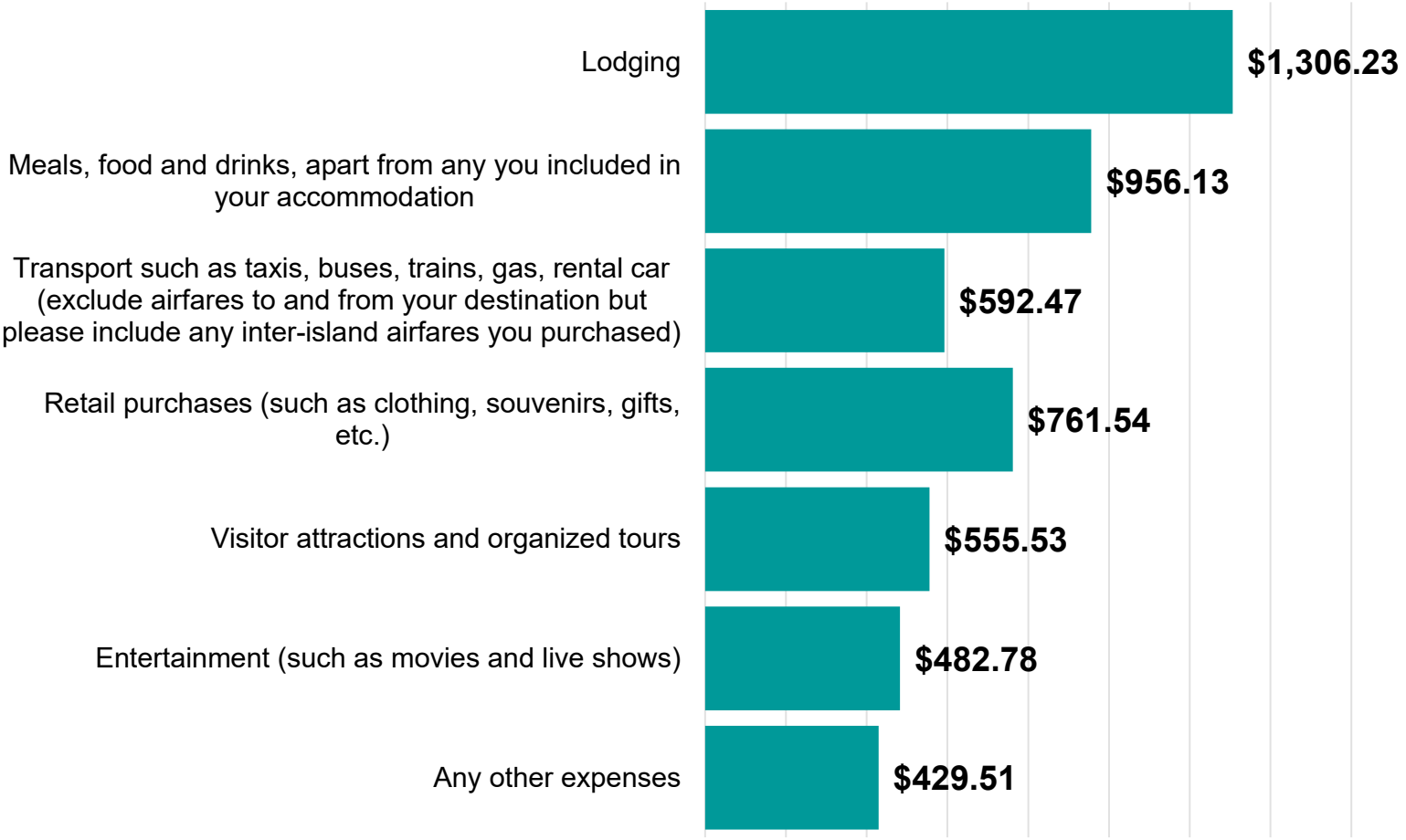
Distance Travelled on Annual Vacation



Sample Size: n=58

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

Average Spend



Sample Size: n=58

Spend Per Person Per Day

5.3
Ave # Nights on Annual Vacation

3.6
Ave # of People on Annual Vacation



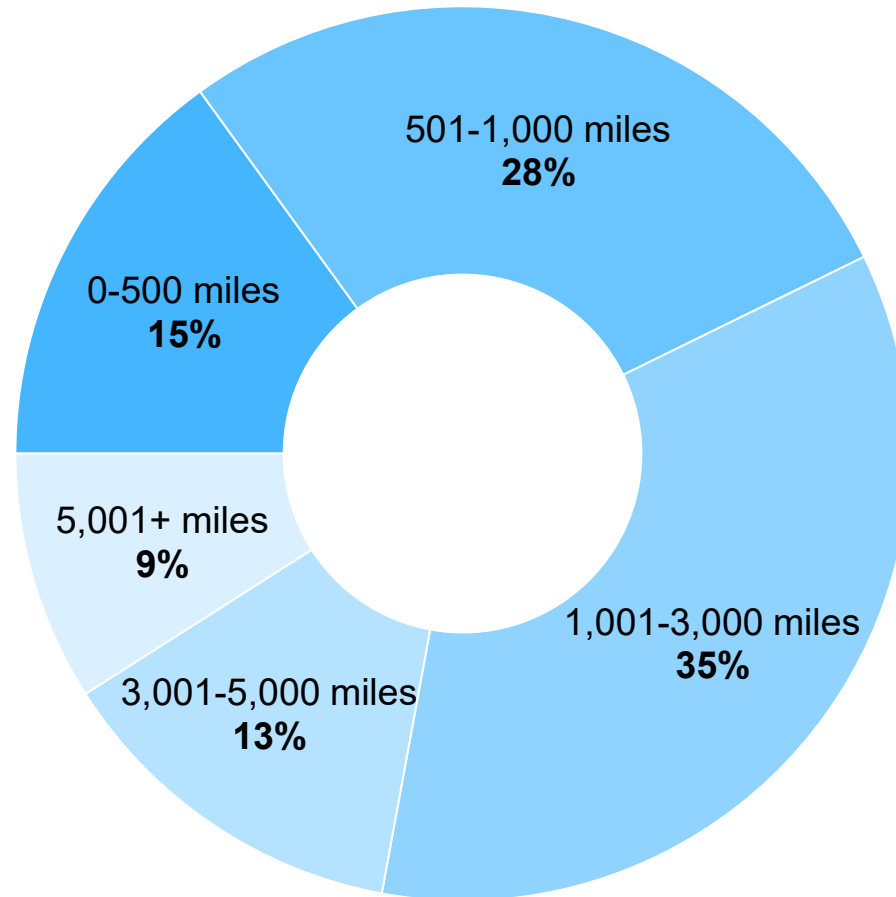
\$265.91

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

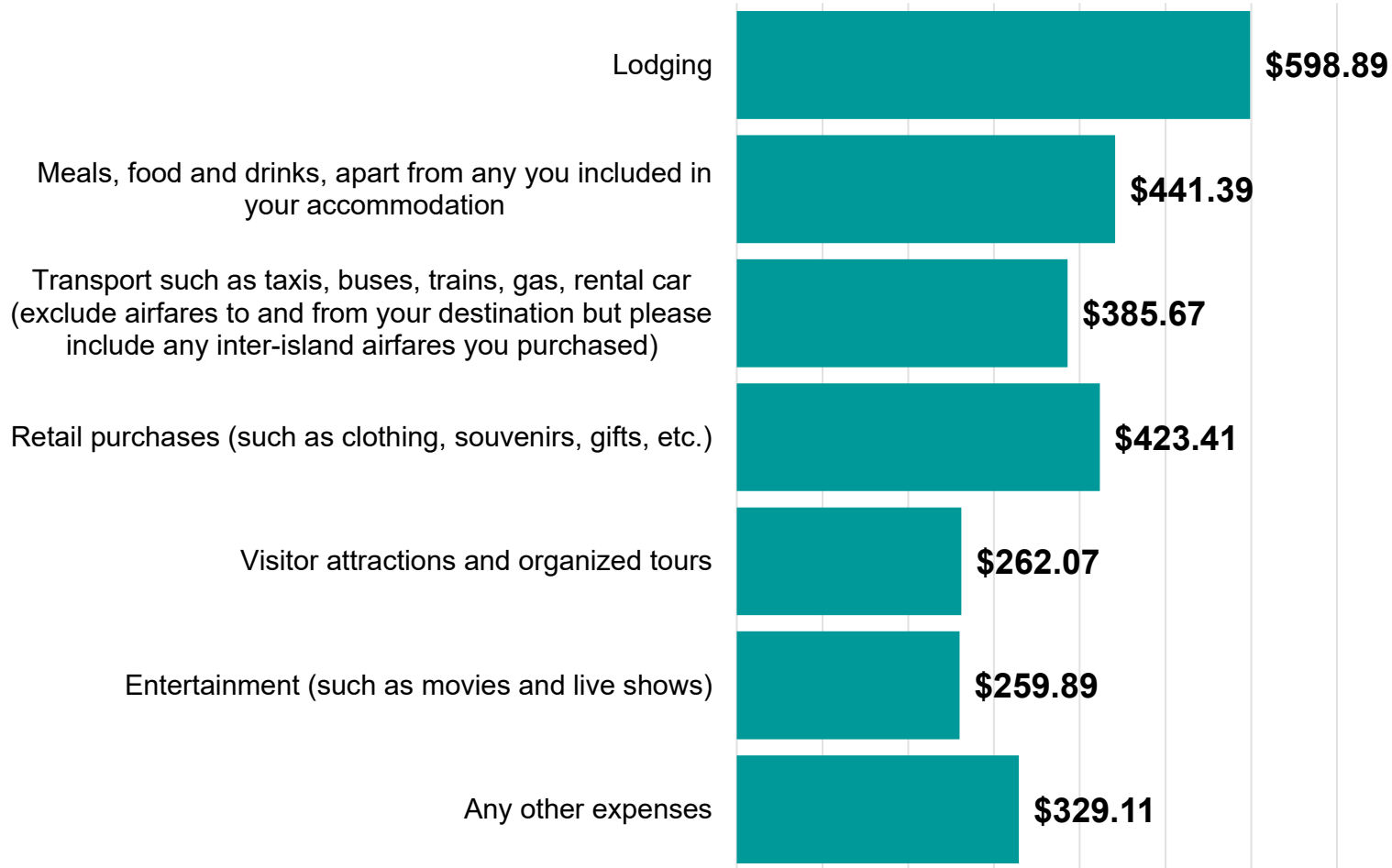
Distance Travelled on Annual Vacation



Sample Size: n=428

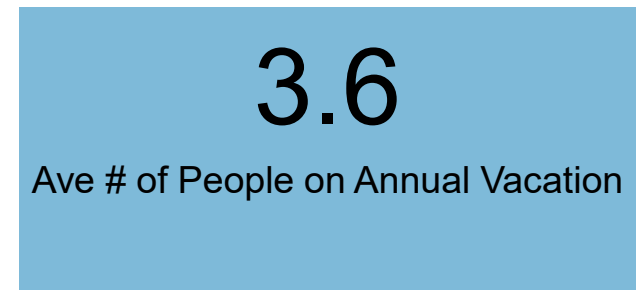
U.S. Long-Distance Travelers: Annual Vacation

Average Spend



Sample Size: n=428

Spend Per Person Per Day

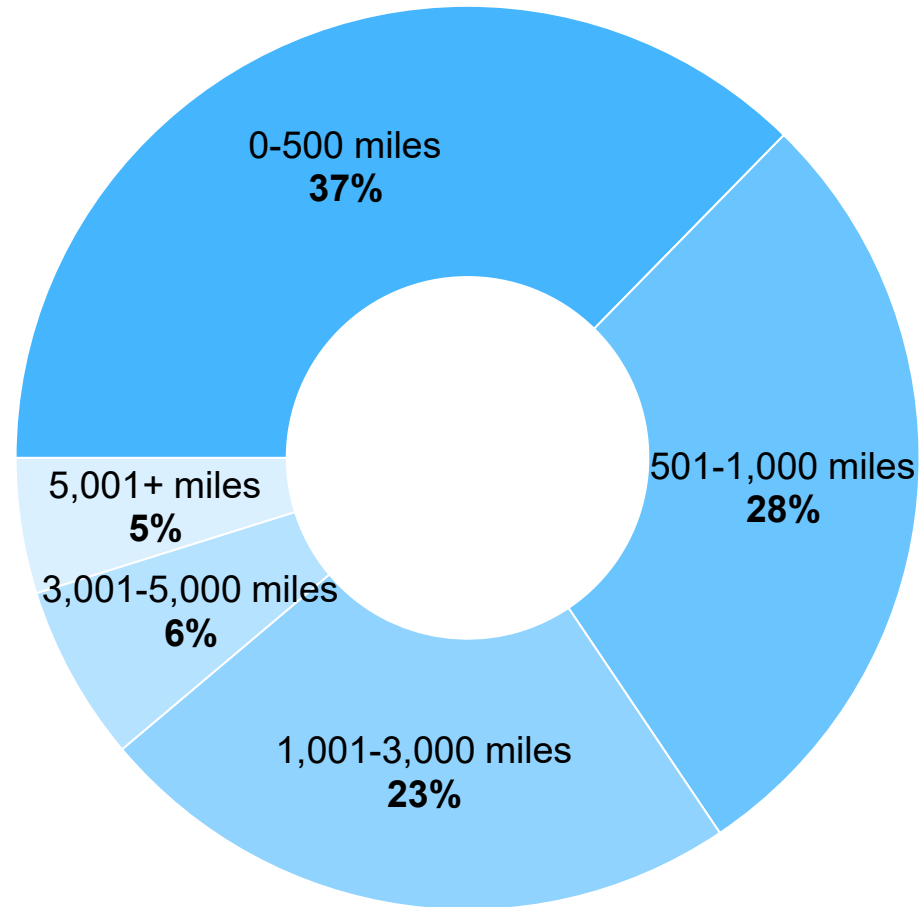


\$142.37

Ave. Per Person Per Day Spend

U.S. Nat Rep: Annual Vacation

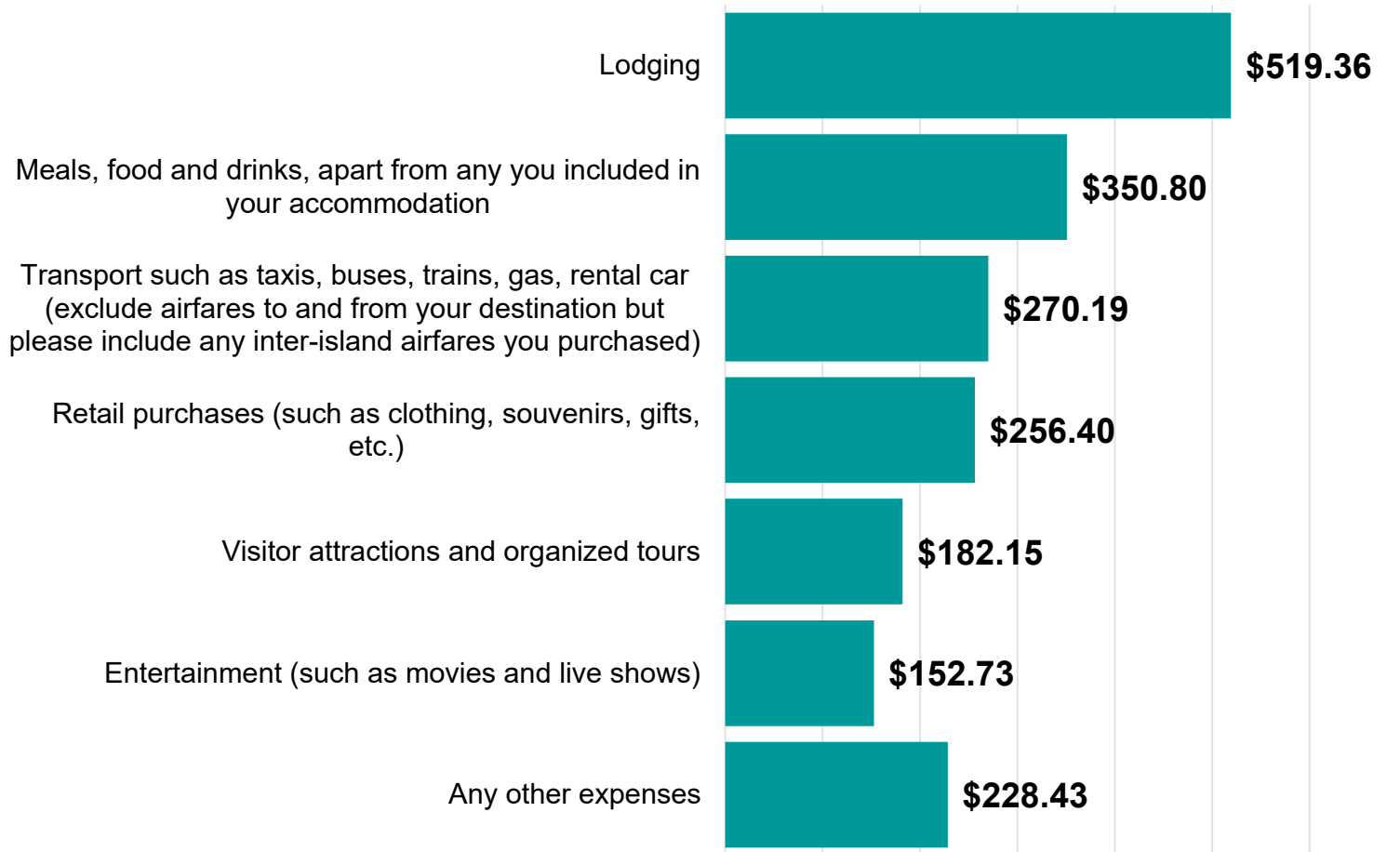
Distance Travelled on Annual Vacation



Sample Size: n=1,788

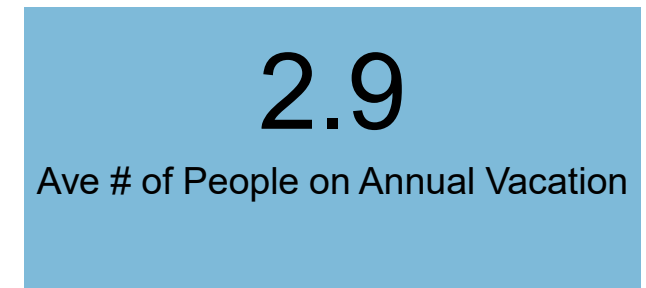
U.S. Nat Rep: Annual Vacation

Average Spend



Sample Size: n=1,788

Spend Per Person Per Day



\$135.63

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. - 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% | 49% | 54% | 53% |
| Value for money | 56% | 58% | 50% | 56% |
| Entertainment and nightlife | 40% | 45% | 36% | 31% |
| Consideration of sustainable principles | 42% | 41% | 39% | 28% |
| Natural attractions/activities | 49% | 51% | 46% | 44% |
| Cultural attractions | 43% | 37% | 39% | 36% |
| Opportunity to experience local restaurants/businesses | 44% | 50% | 45% | 40% |
| Family-friendly location and activities | 51% | 50% | 51% | 44% |
| Safe and Secure Destination | 58% | 57% | 56% | 60% |

Sample Size:

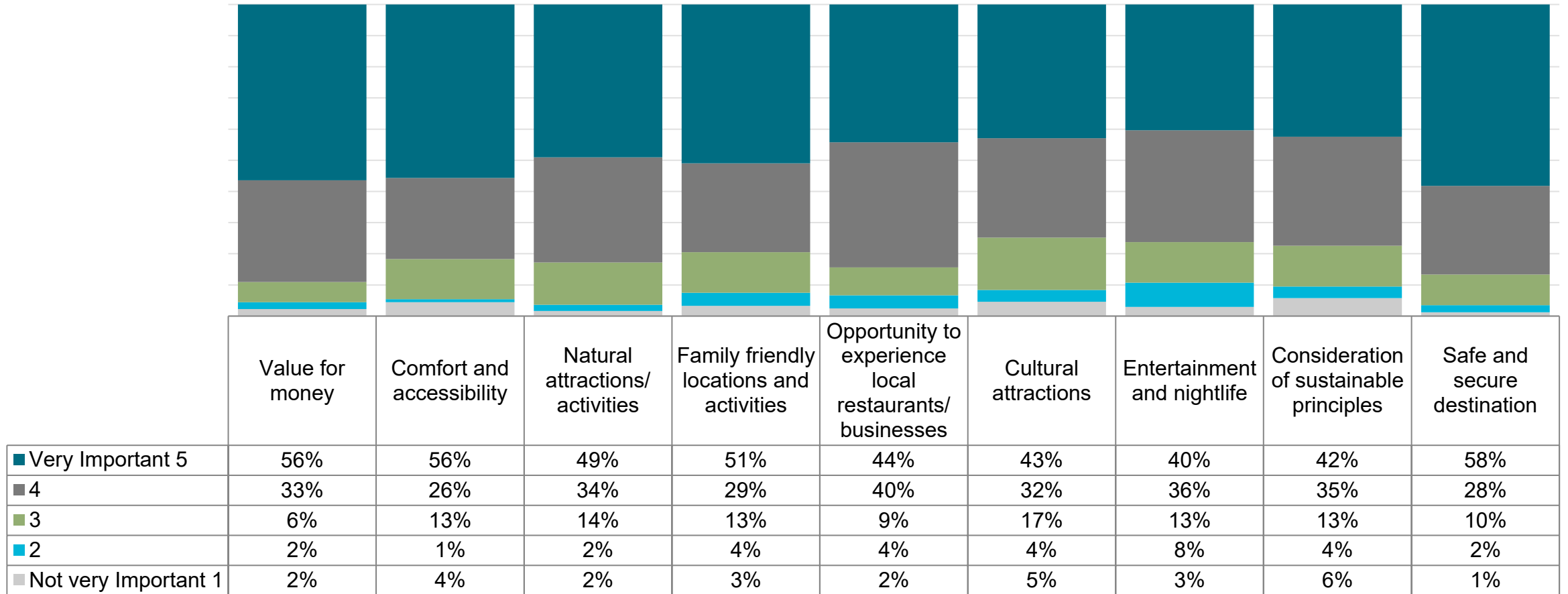
n=163

n=58

n=428

n=1,788

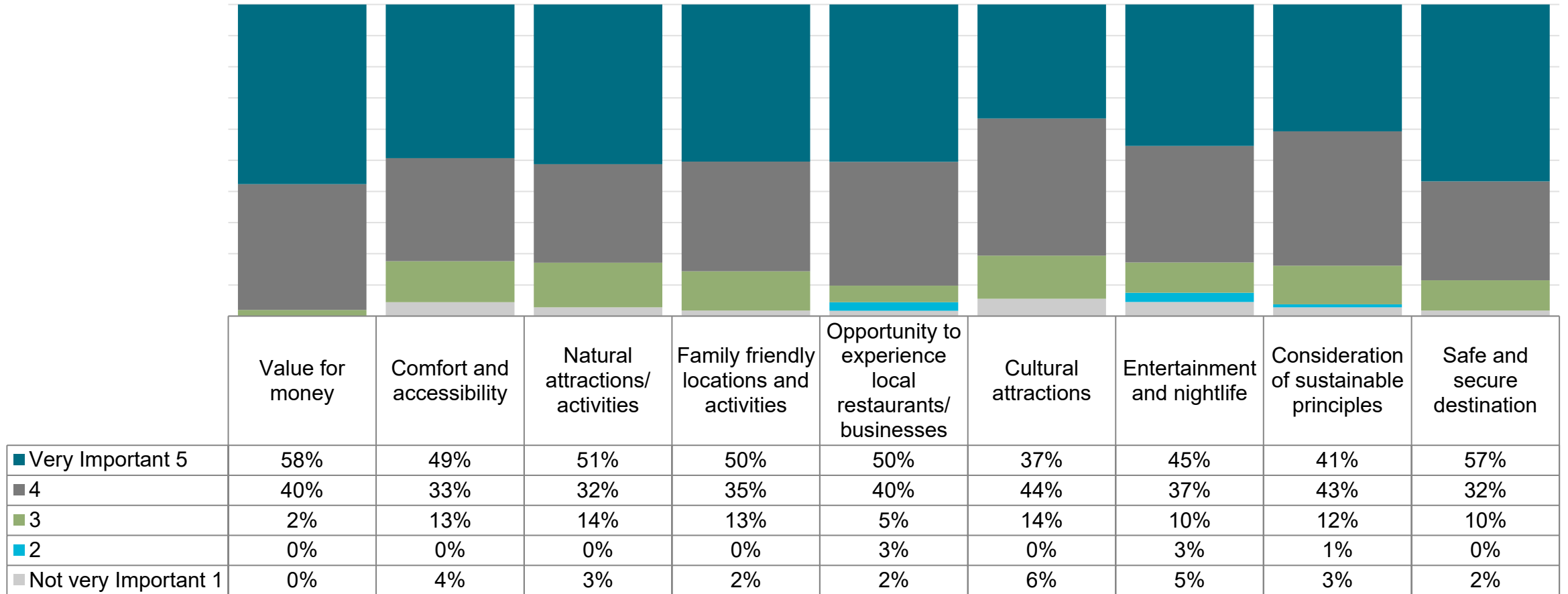
U.S. Avid Travelers \$100k+: Importance of Travel Factors



Not very Important 1
 2
 3
 4
 Very Important 5

Sample Size: n=163

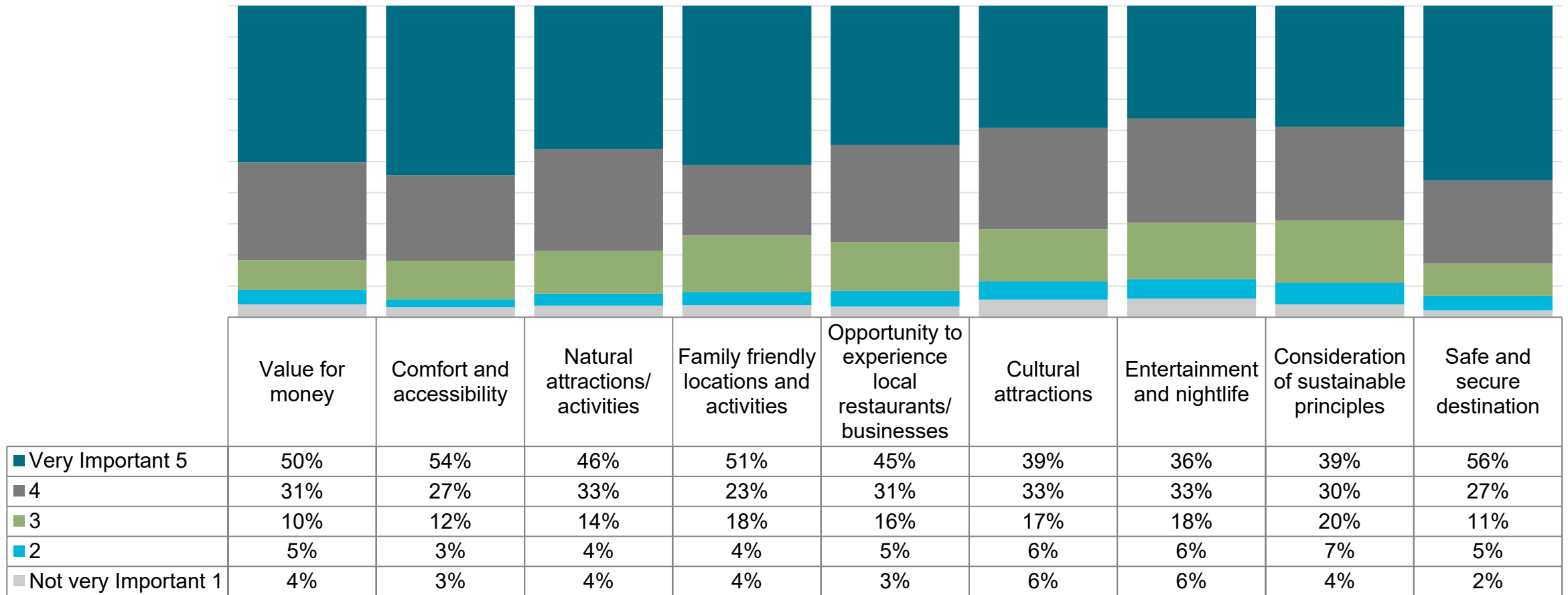
U.S. Avid Travelers \$150k+: Importance of Travel Factors



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

Sample Size: n=58

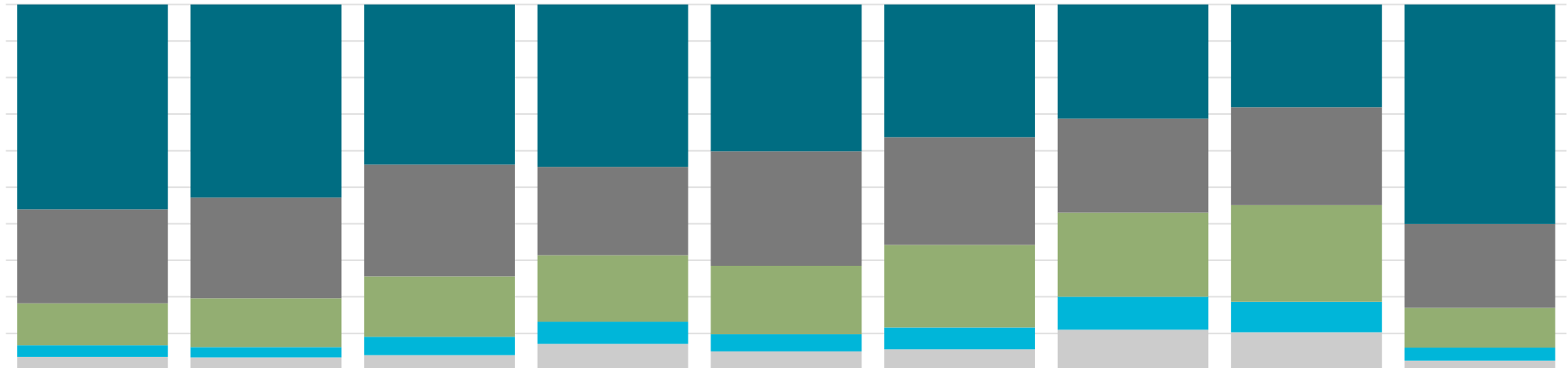
U.S. Long Distance Travelers: Importance of Travel Factors



Not very Important 1
 2
 3
 4
 Very Important 5

Sample Size: n=428

U.S. Nat Rep: Importance of Travel Factors



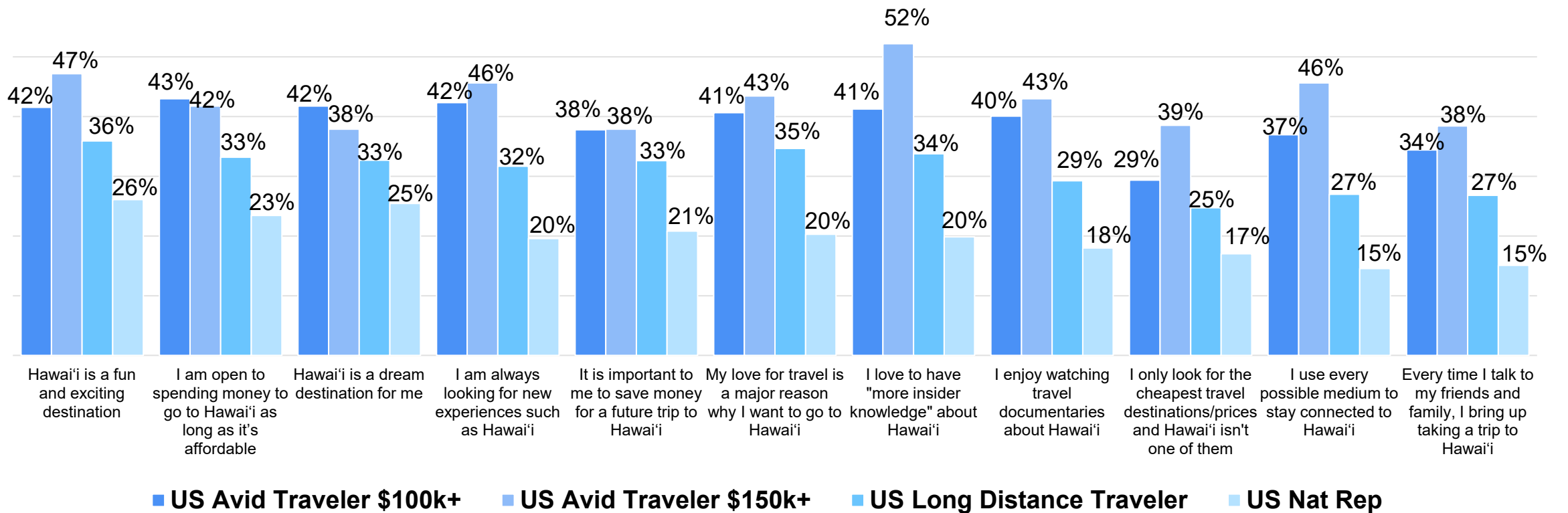
| | Value for money | Comfort and accessibility | Natural attractions/activities | Family friendly locations and activities | Opportunity to experience local restaurants/businesses | Cultural attractions | Entertainment and nightlife | Consideration of sustainable principles | Safe and secure destination |
|----------------------|-----------------|---------------------------|--------------------------------|--|--|----------------------|-----------------------------|---|-----------------------------|
| Very Important 5 | 56% | 53% | 44% | 44% | 40% | 36% | 31% | 28% | 60% |
| 4 | 26% | 28% | 31% | 24% | 31% | 30% | 26% | 27% | 23% |
| 3 | 12% | 13% | 17% | 18% | 19% | 23% | 23% | 26% | 11% |
| 2 | 3% | 3% | 5% | 6% | 5% | 6% | 9% | 8% | 4% |
| Not very Important 1 | 4% | 3% | 4% | 7% | 5% | 6% | 11% | 10% | 3% |

Not very Important 1
 2
 3
 4
 Very Important 5

Sample Size: n=1,788

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

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



Sample Size:

n=163

n=58

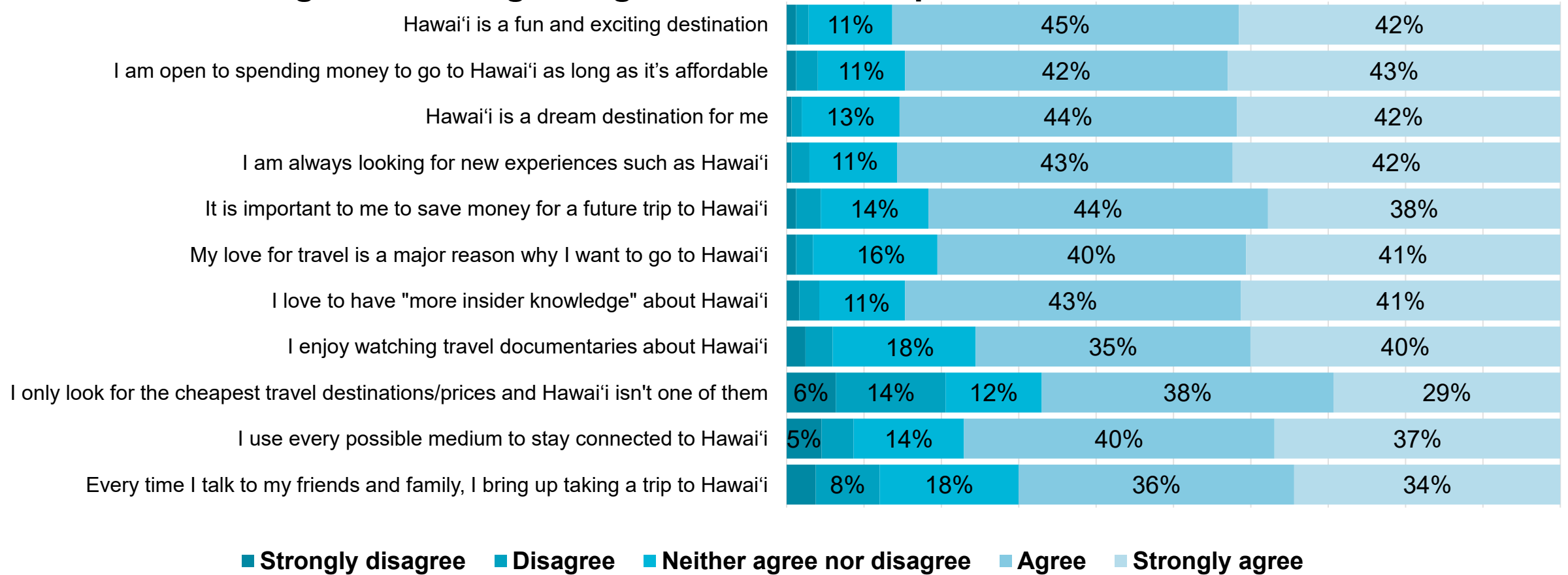
n=428

n=1,788

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

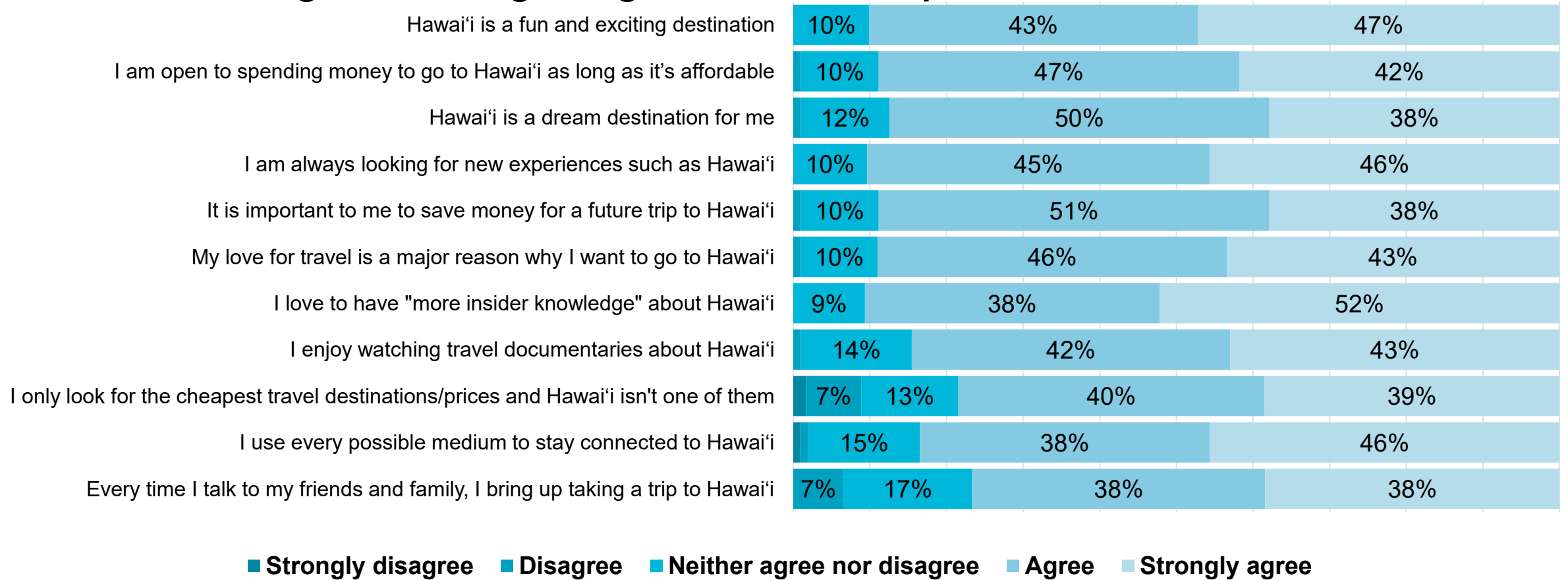
Agreement Regarding Hawai'i as an Aspirational Destination



Sample Size: n=163

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

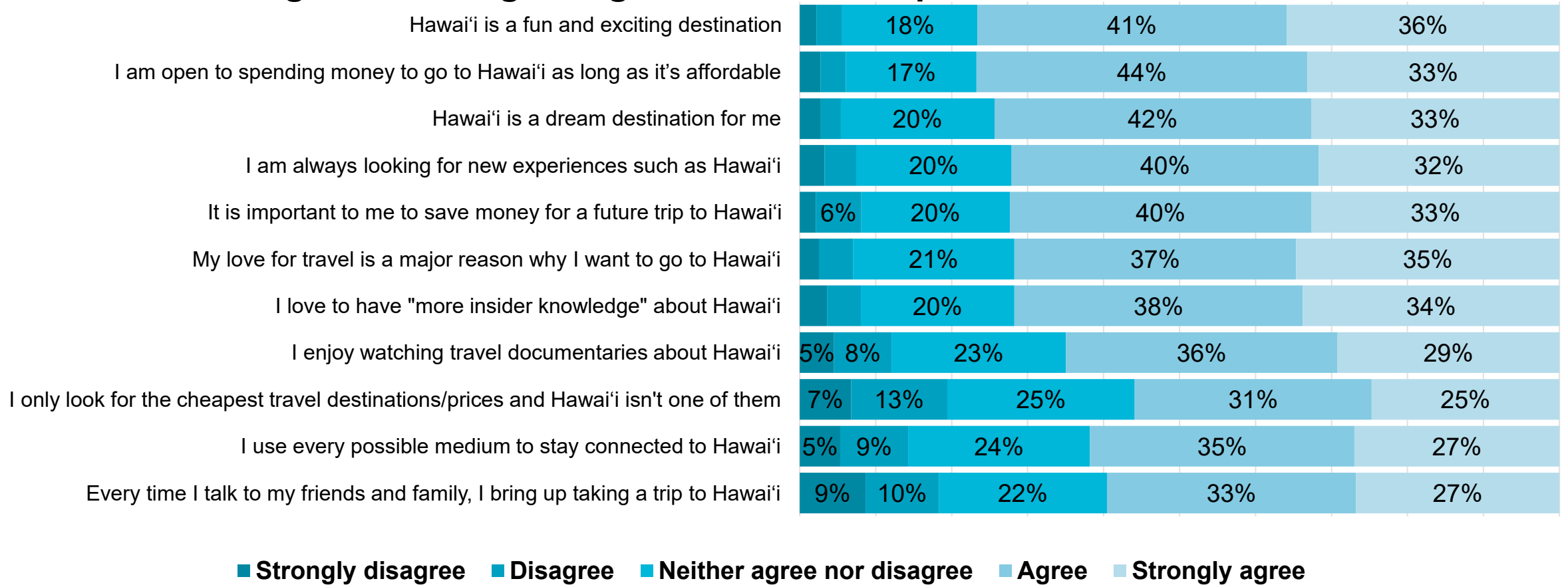
Agreement Regarding Hawai'i as an Aspirational Destination



Sample Size: n=58

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

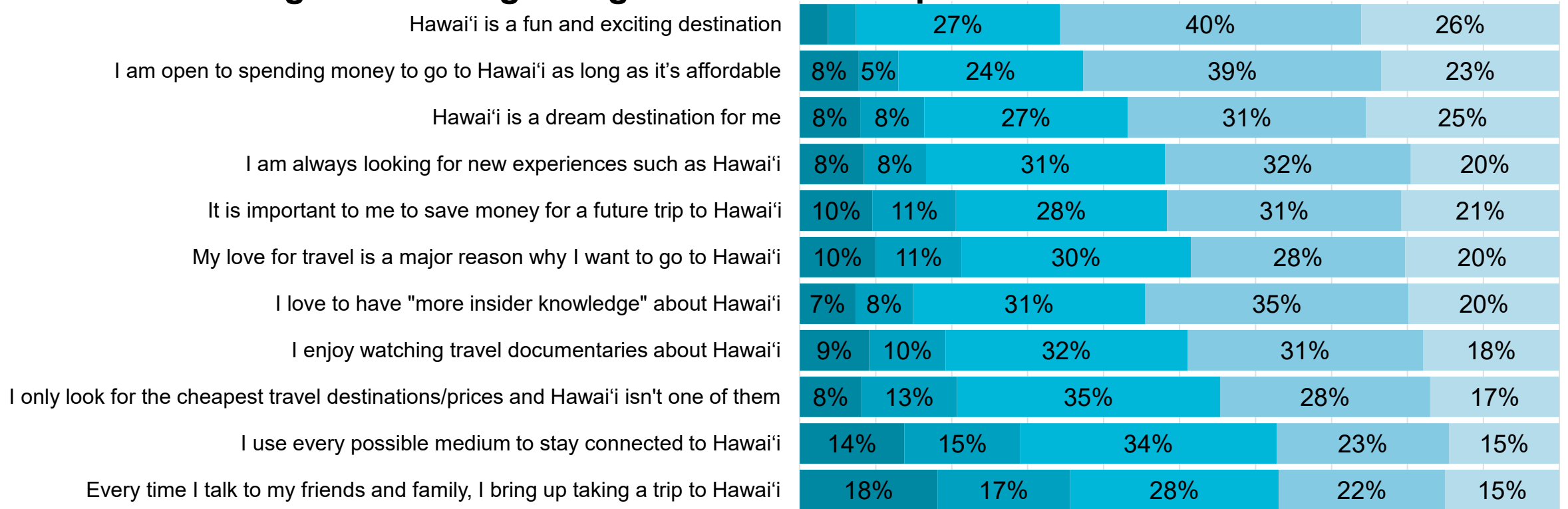
Agreement Regarding Hawai'i as an Aspirational Destination



Sample Size: n=428

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

Agreement Regarding Hawai'i as an Aspirational Destination

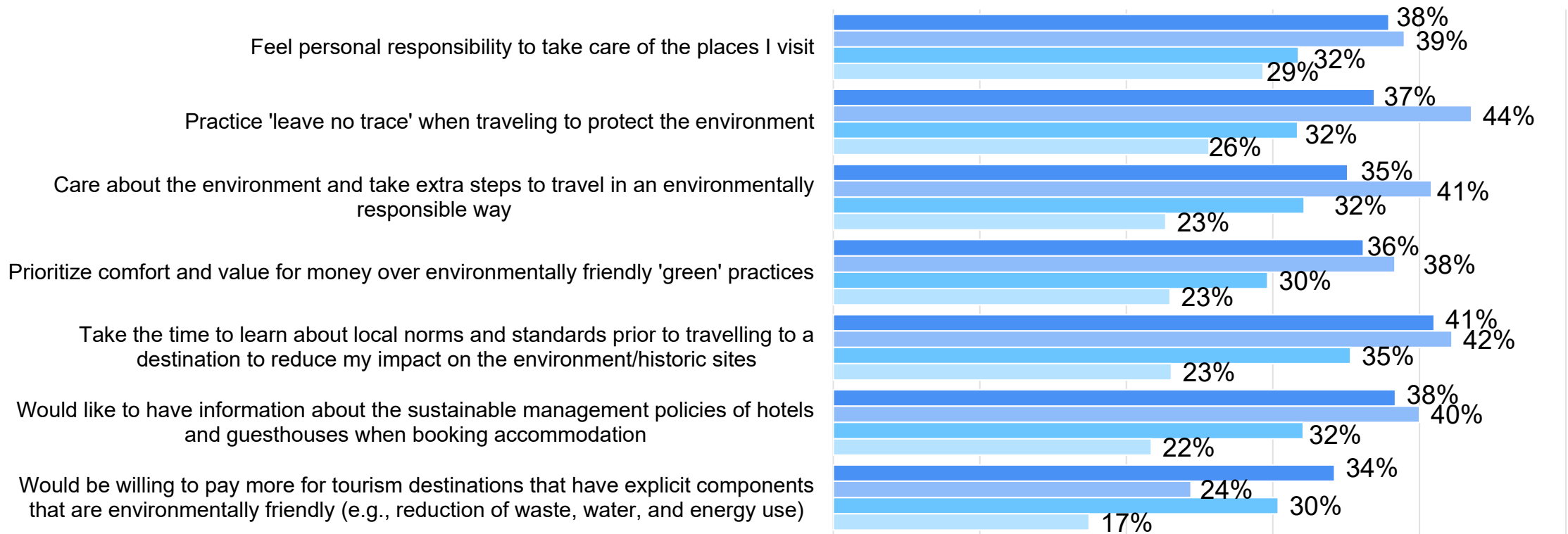


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=1,788

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=163

n=58

n=428

n=1,788

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=163

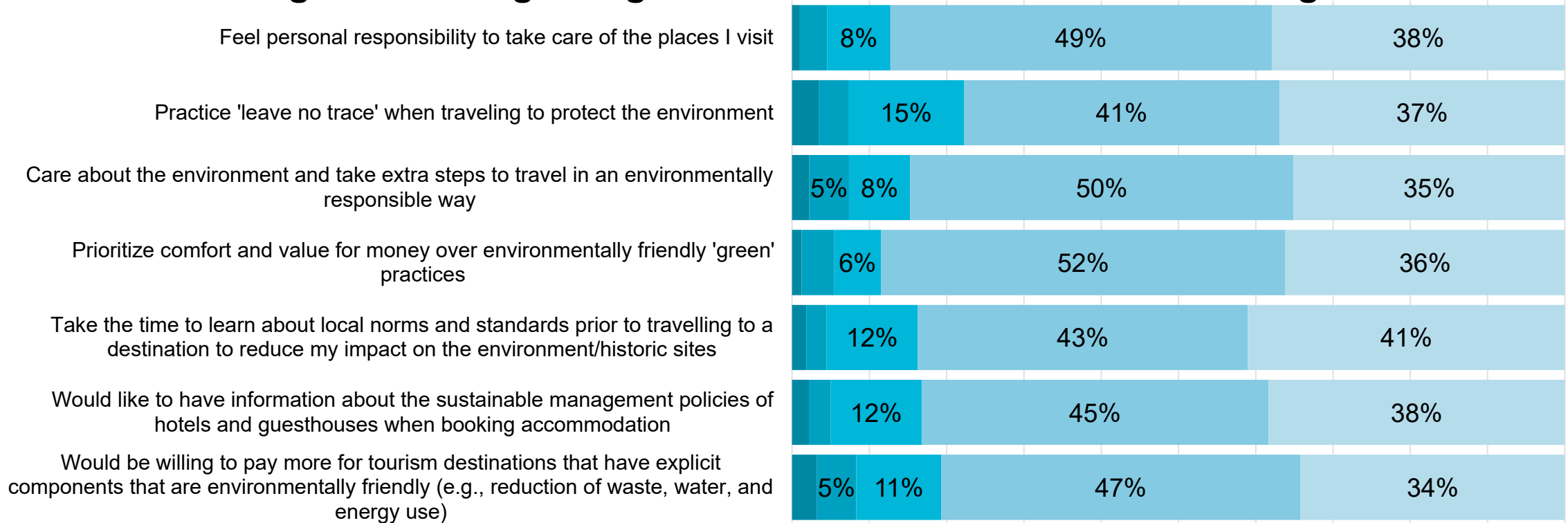
n=58

n=428

n=1,788

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

Agreement Regarding Sustainable Practices While Traveling

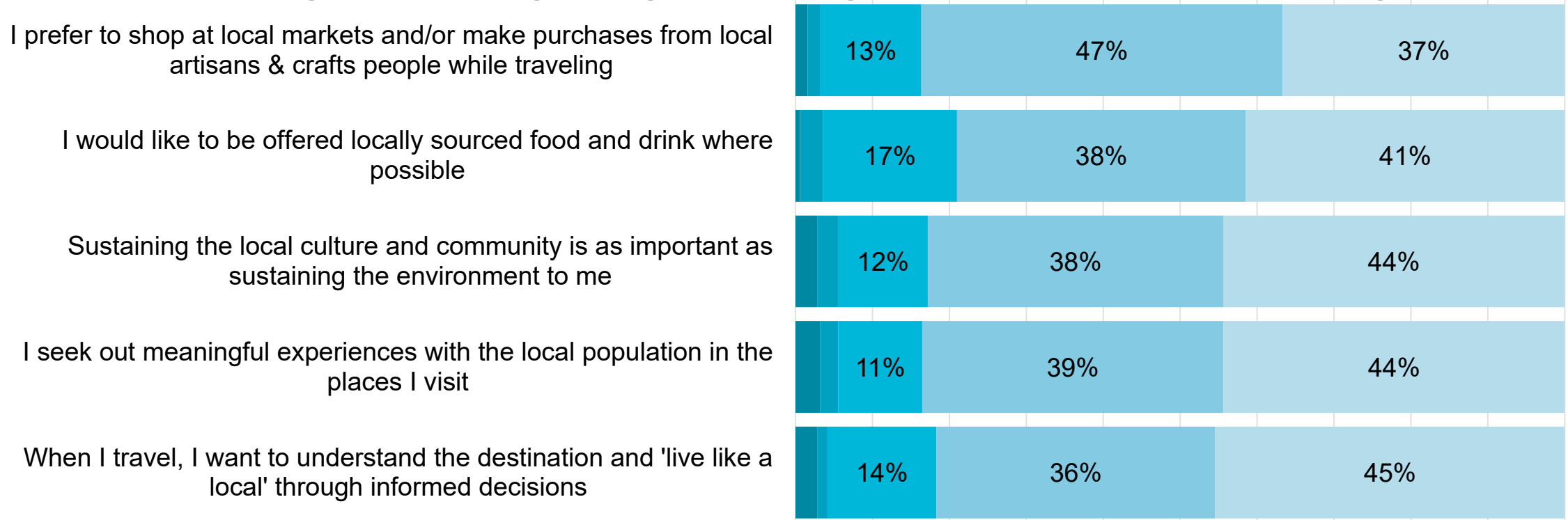


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=163

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

Agreement Regarding Sustaining Local Culture While Traveling

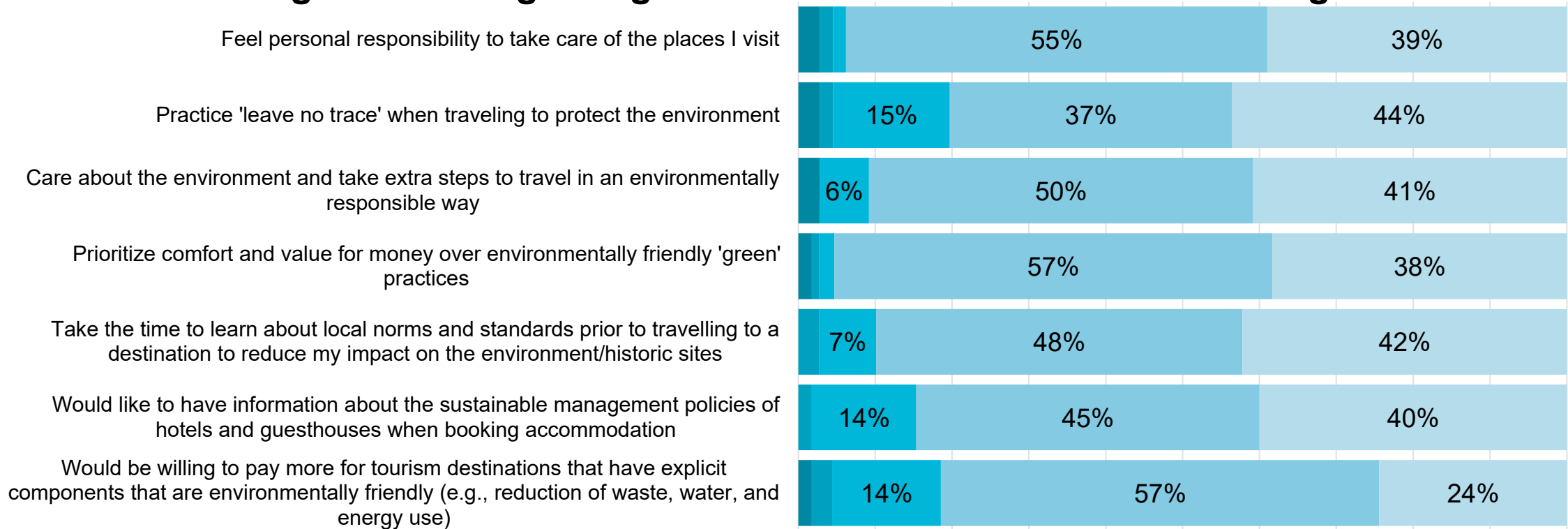


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=163

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

Agreement Regarding Sustainable Practices While Traveling

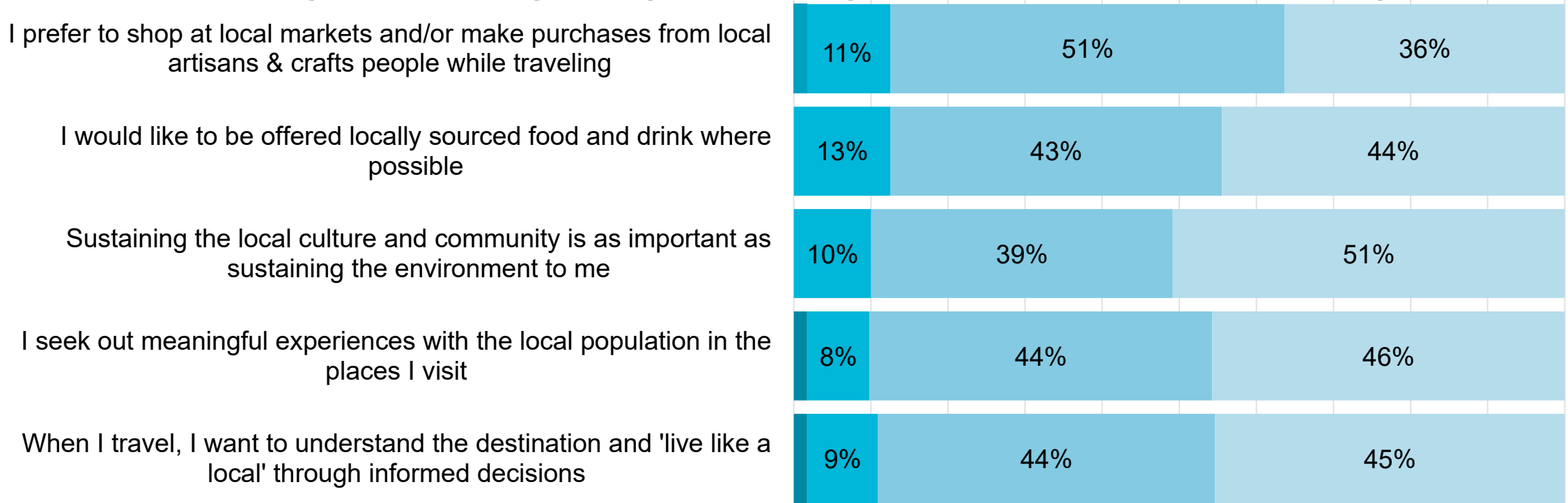


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=58

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

Agreement Regarding Sustaining Local Culture While Traveling

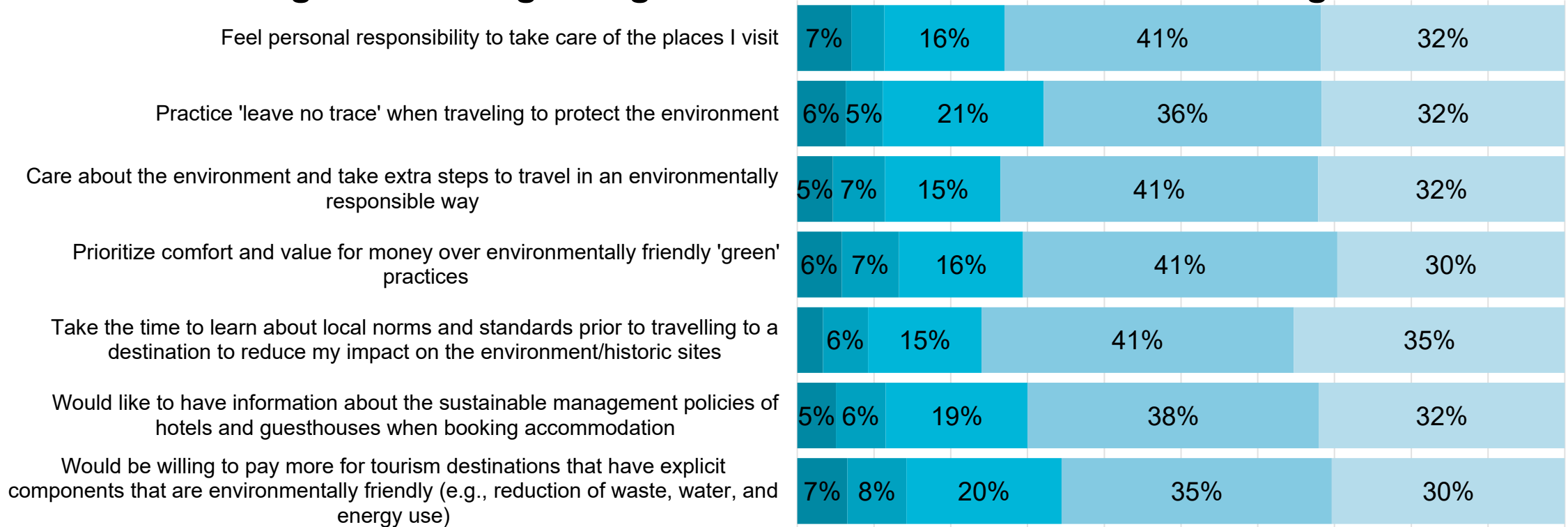


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=58

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=428

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

Agreement Regarding Sustaining Local Culture While Traveling

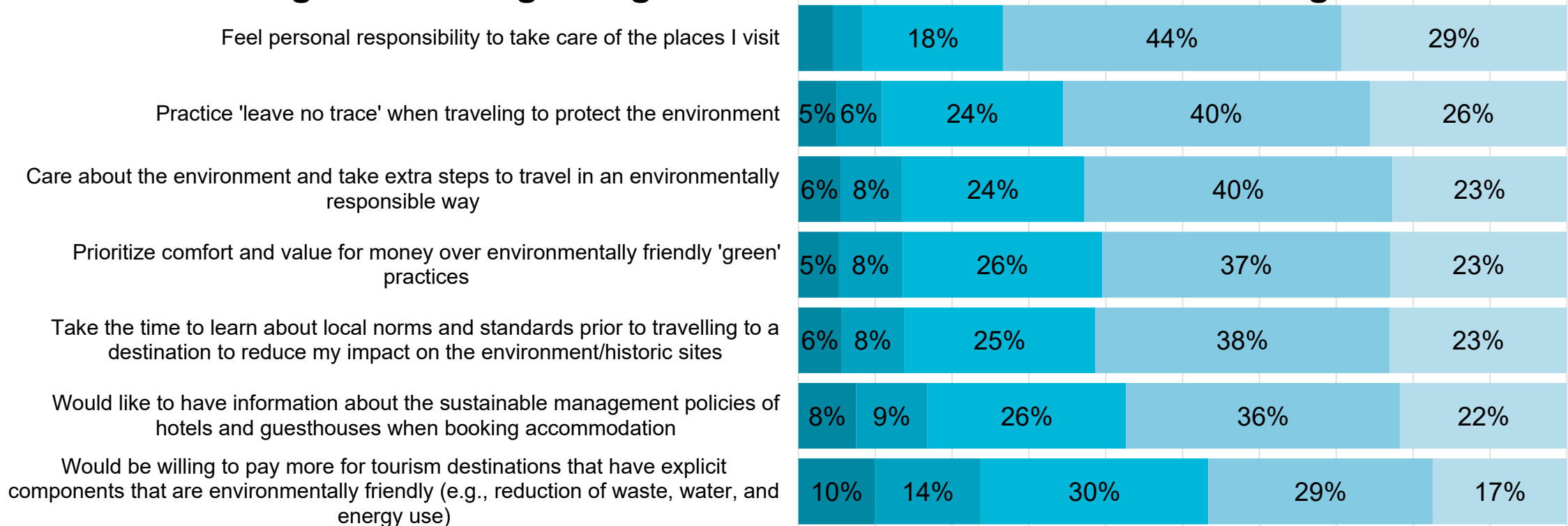


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=428

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=1,788

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

Agreement Regarding Sustaining Local Culture While Traveling

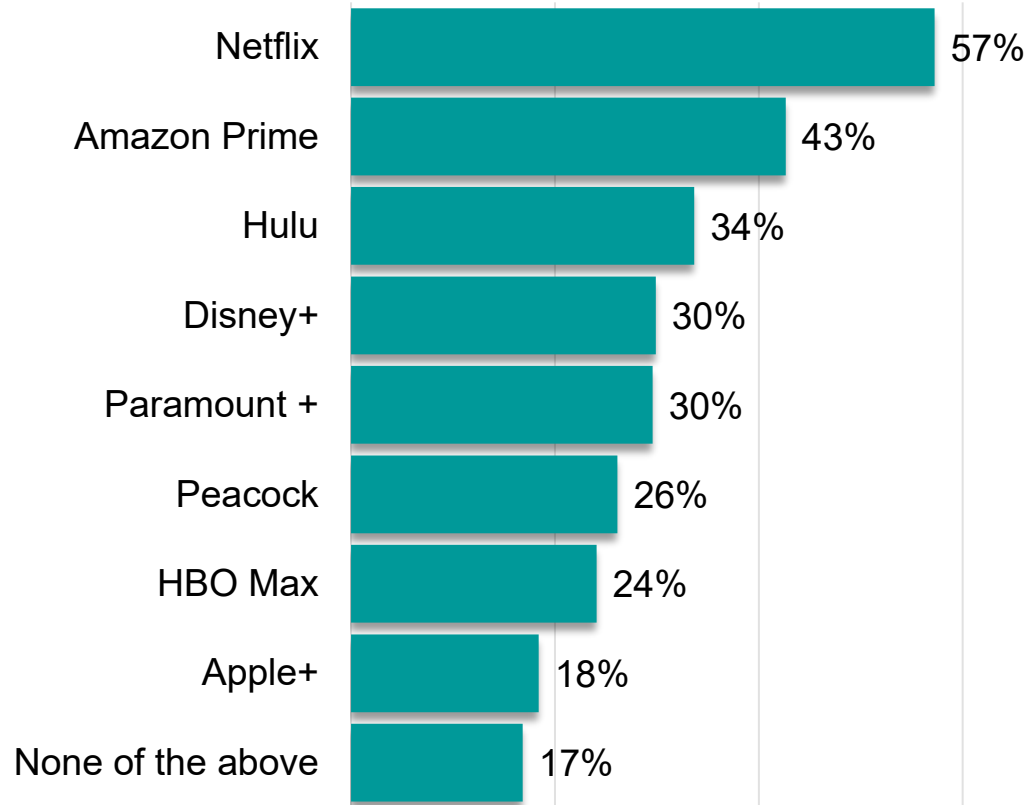


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

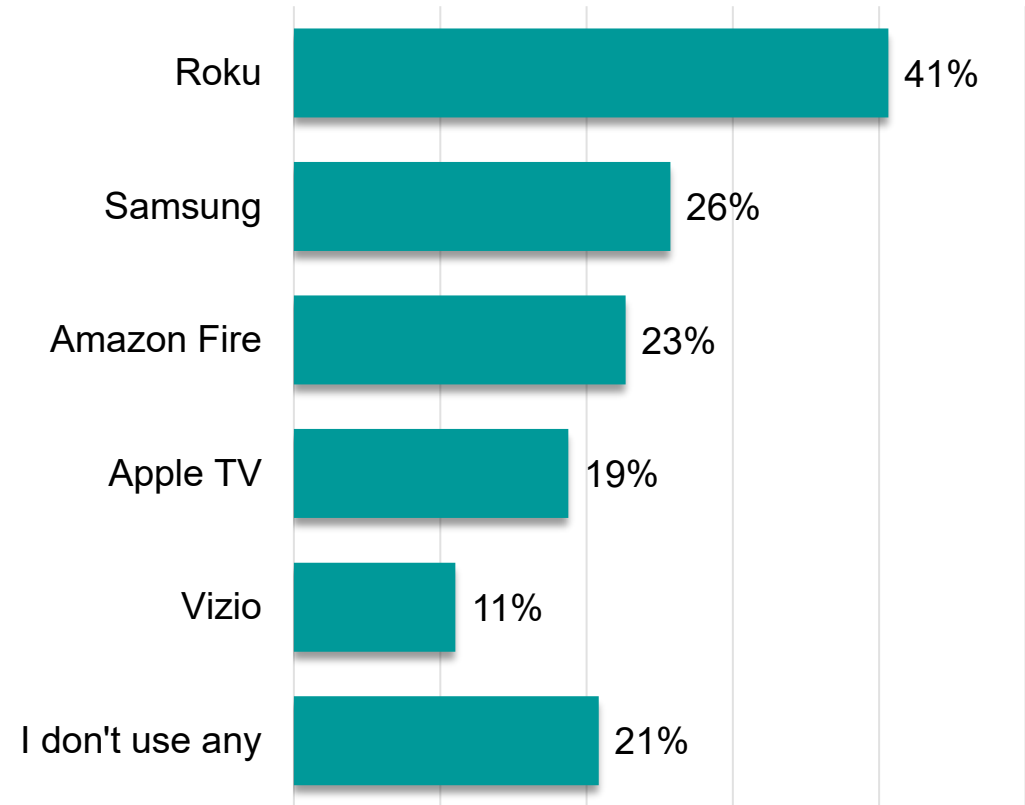
Sample Size: n=1,788

U.S. Media Consumption

Streaming Platforms Used Weekly



Connected Device Used

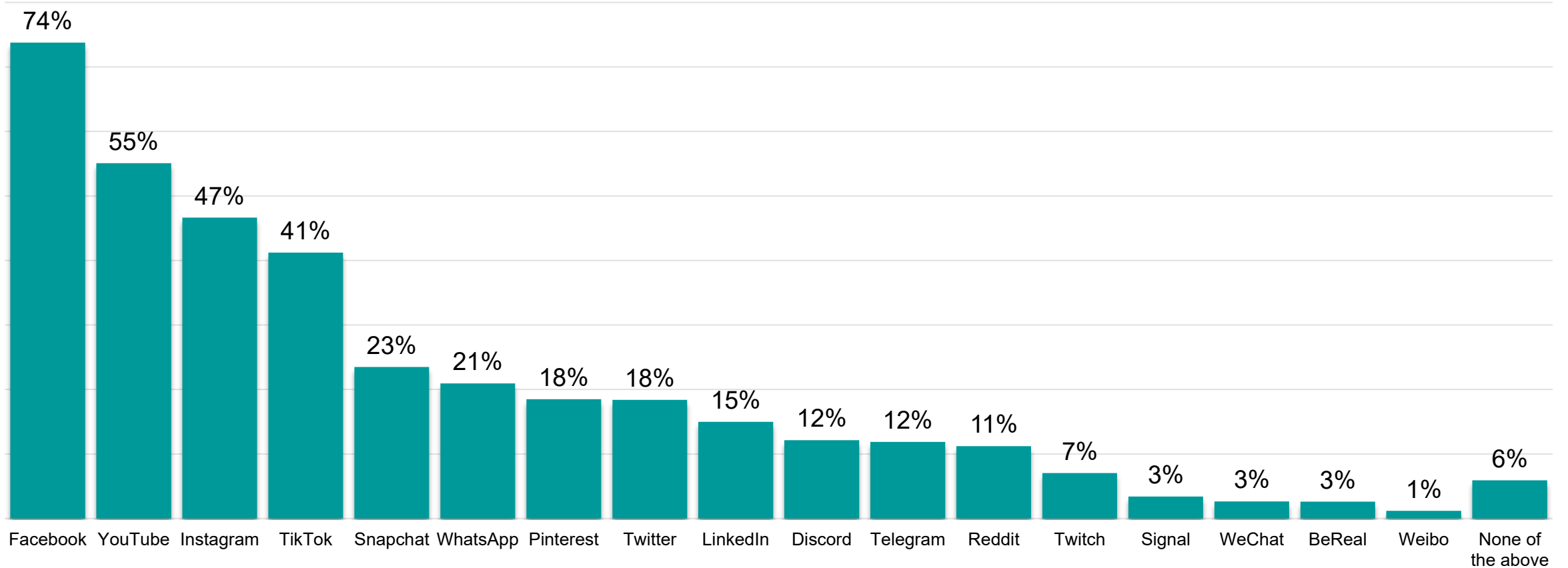


Sample Size: n=1,788

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=1,788

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

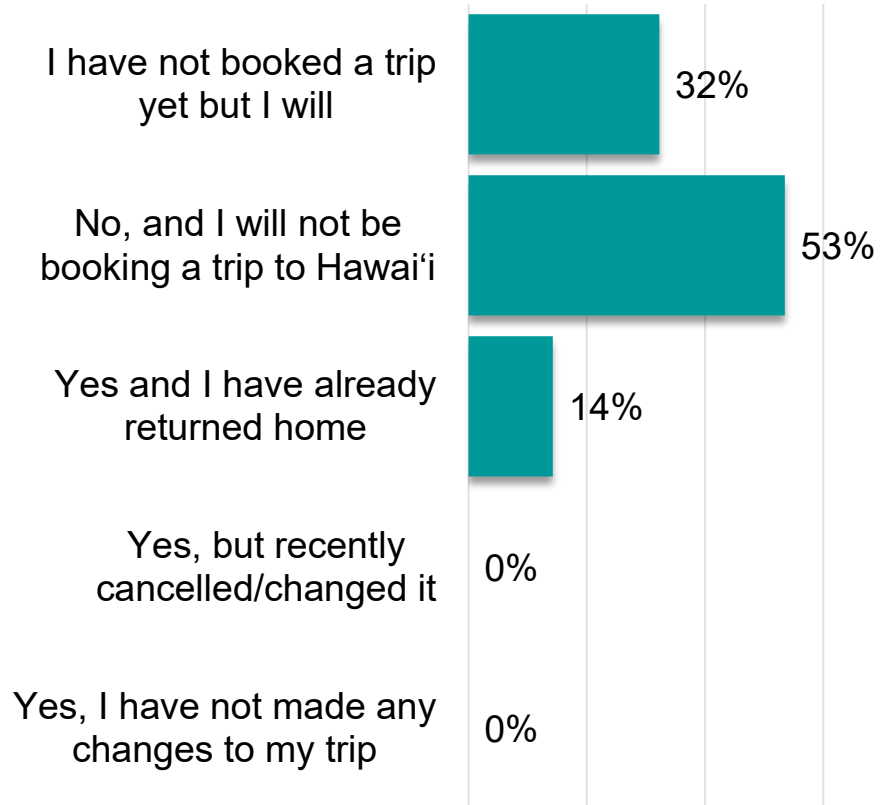
| | |
|--|-----|
| Friends/Family | 40% |
| Online | 28% |
| Social Media | 39% |
| TV commercials | 26% |
| YouTube | 34% |
| TV Program/Documentary | 17% |
| Email | 18% |
| Radio | 9% |
| Newspaper | 9% |
| Out of home advertising (e.g. Poster Billboards, bus shelter advertisements, etc.) | 8% |
| I don't recall | 14% |

Actions Taken After Seeing an Ad for a Destination

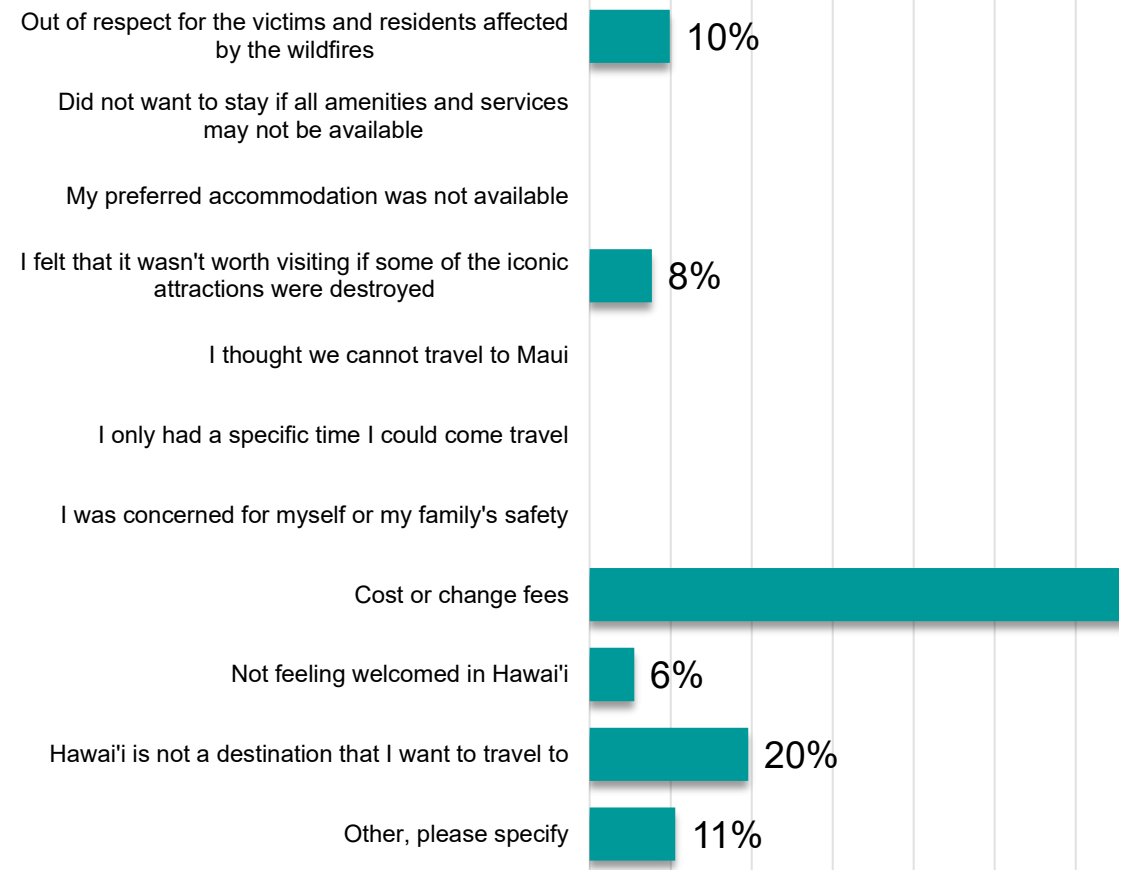
| | |
|---|-----|
| I search for information about the destination online | 41% |
| I talk to friends/family about the destination | 31% |
| I go to the destination's website | 31% |
| I look up the destination on social media | 24% |
| I book travel to the destination almost immediately | 14% |
| I don't do anything | 17% |
| None of the above | 11% |

Sample Size: n=1,788

U.S. - Hawai'i Booking Intent



Sample Size: n=1,788

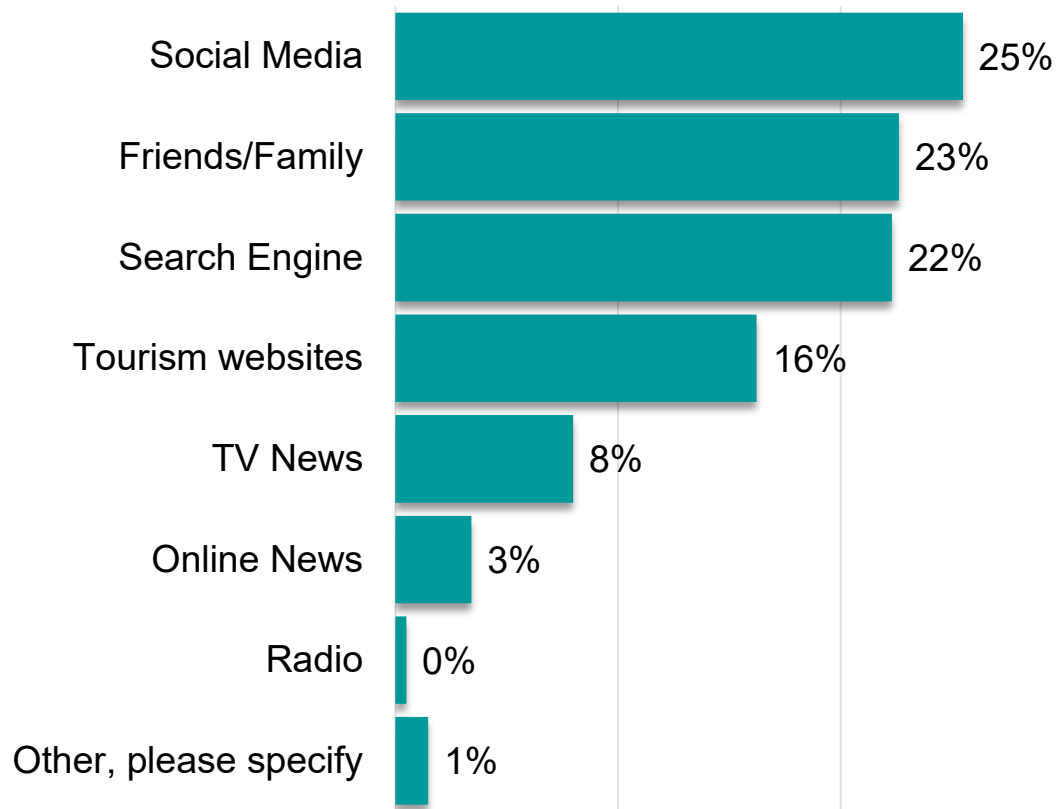


Sample Size: n=1,065

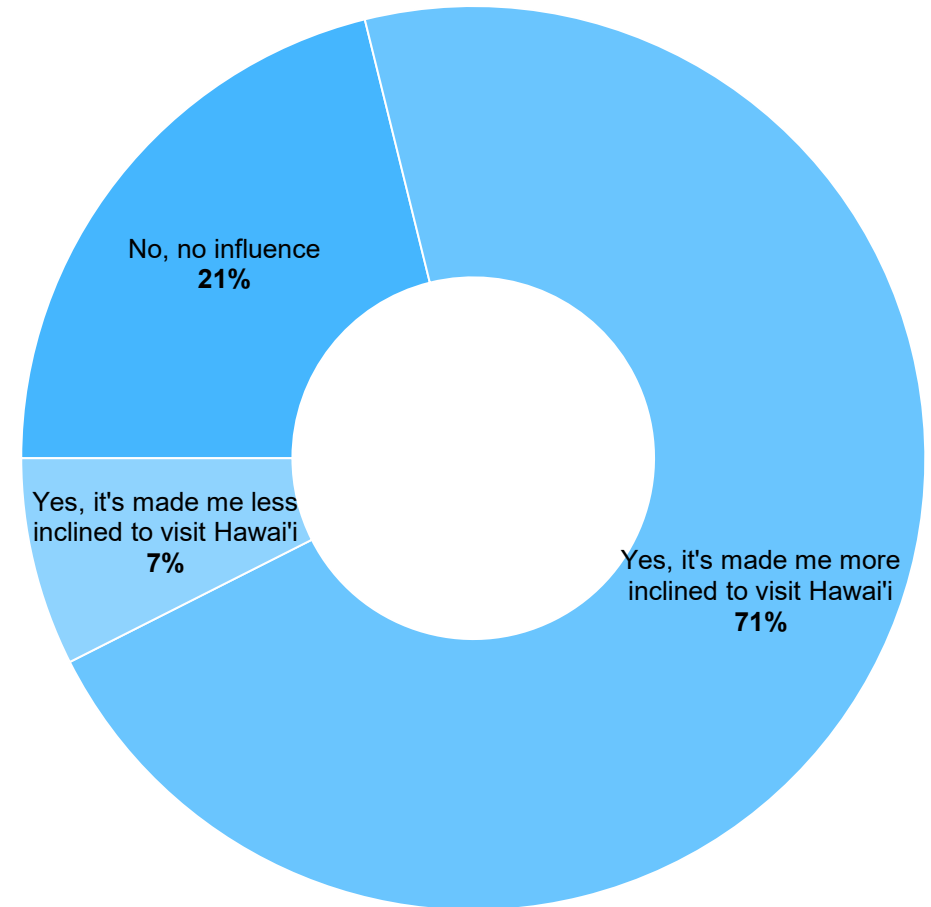
Are you planning to book a trip to the Hawai'i Islands this year? | What factors informed your ultimate choice to delay or otherwise not visit the Hawaiian Islands? Please select all that apply.

U.S. - State of Hawai'i Information Sources

Primary Info Source When Researching the Hawaiian Islands



Influence on Vacation

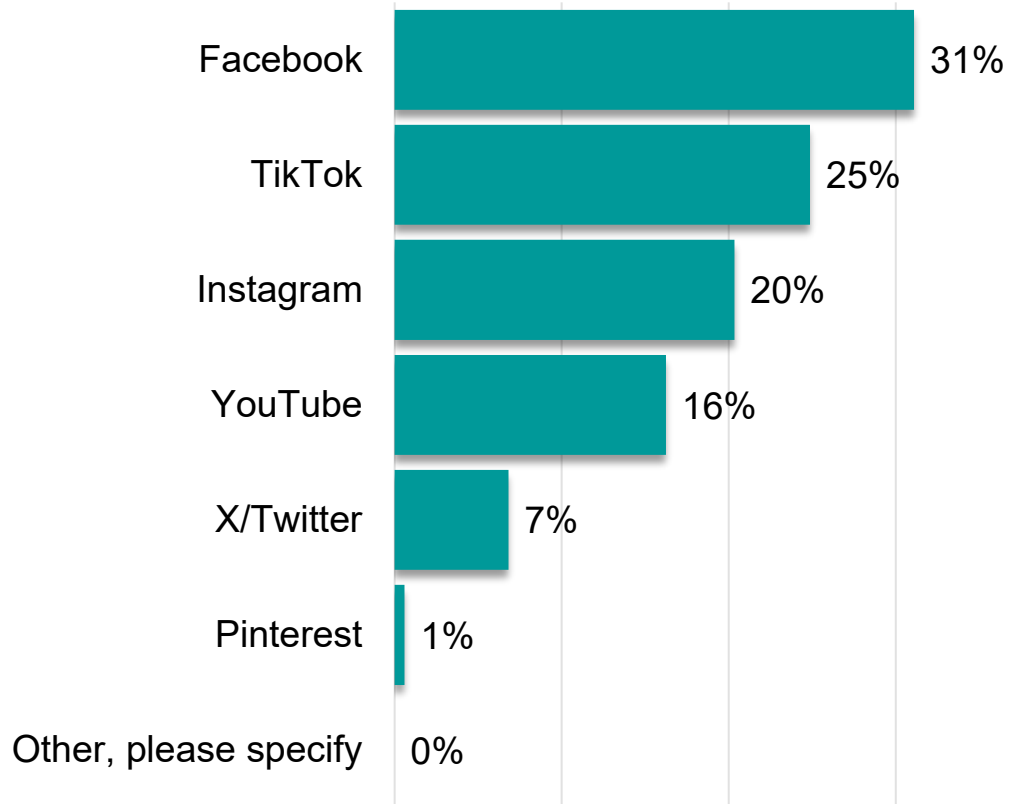


Sample Size: n=723

What is your primary source of information when researching your trip to the Hawaiian Islands? | Has what you've seen or heard from [PIPE IN Hawaiian Islands selection] influenced your consideration of Hawai'i for your next vacation?

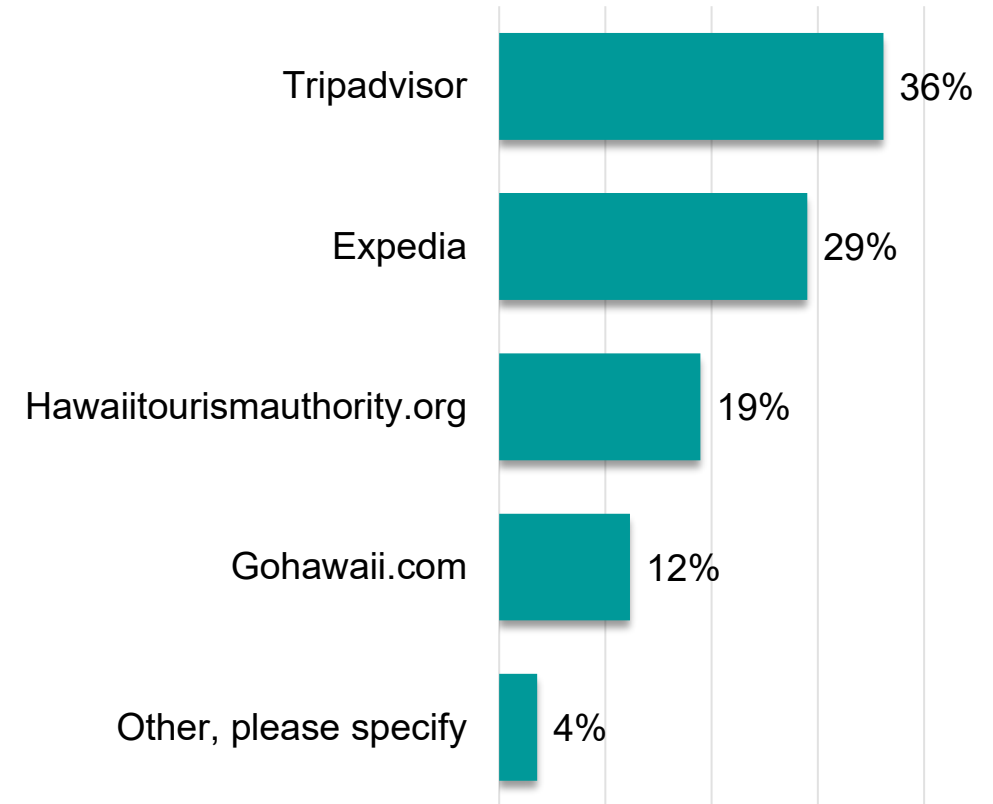
U.S. - State of Hawai'i Information Sources

Social Media Utilized Most



Sample Size: n=169

Tourism Websites Utilized Most



Sample Size: n=132

Which of the following social media platforms do you utilize the most? | Which tourism website do you utilize the most?