



Vision Insights U.S. Traveler Profiles February 2026

March 18, 2026



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
 - 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

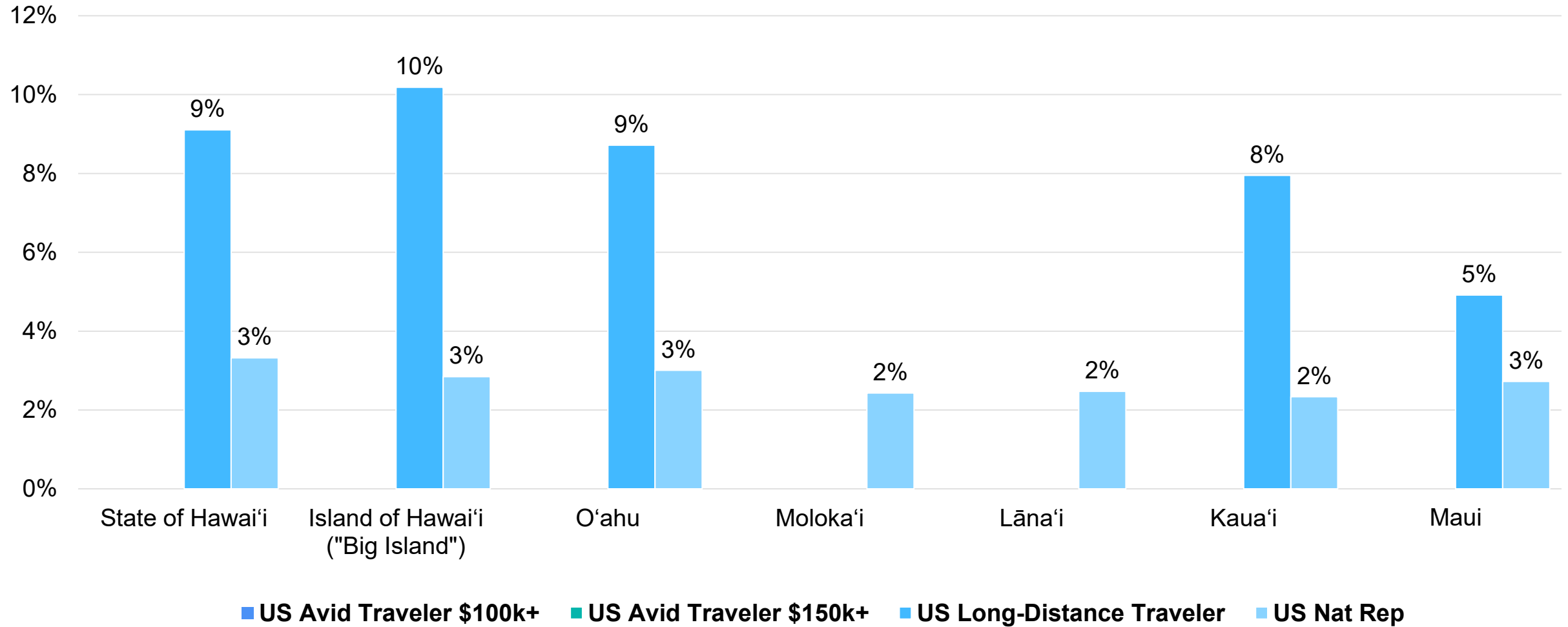
Avid Traveler \$150k+

- 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

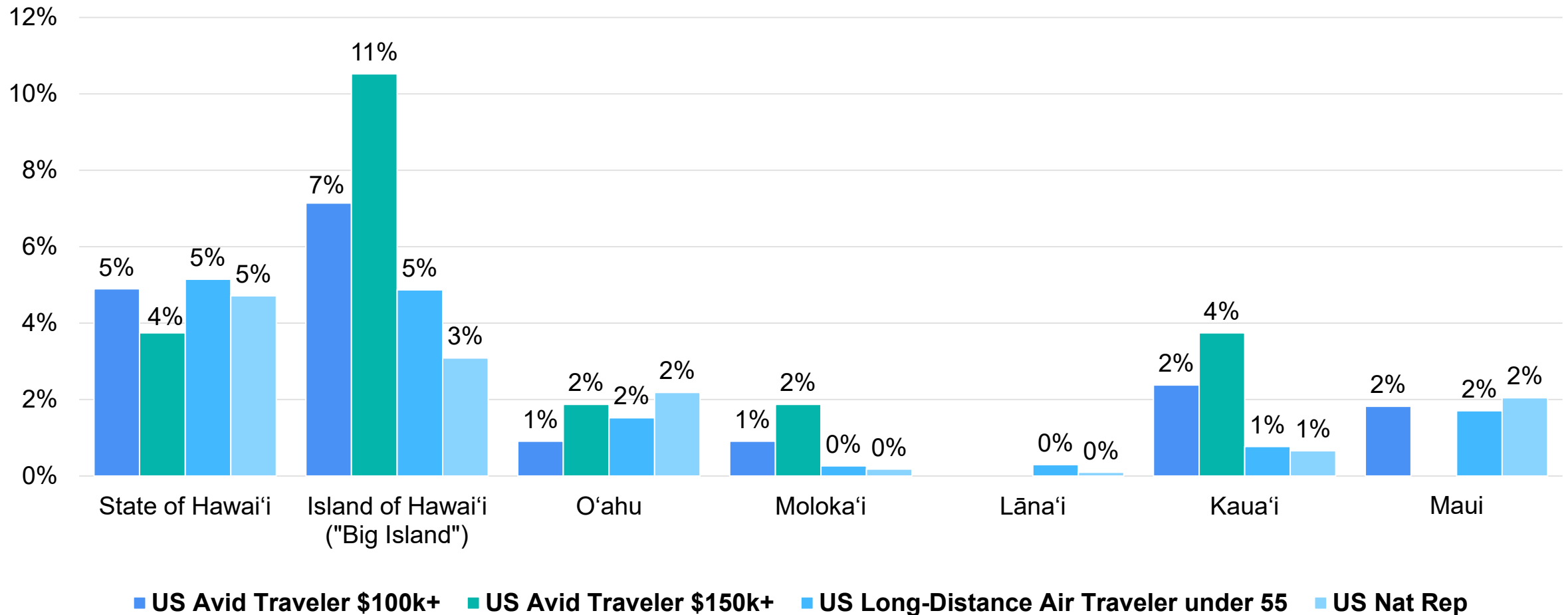
U.S. - Leisure Trip In Past 12 Months



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

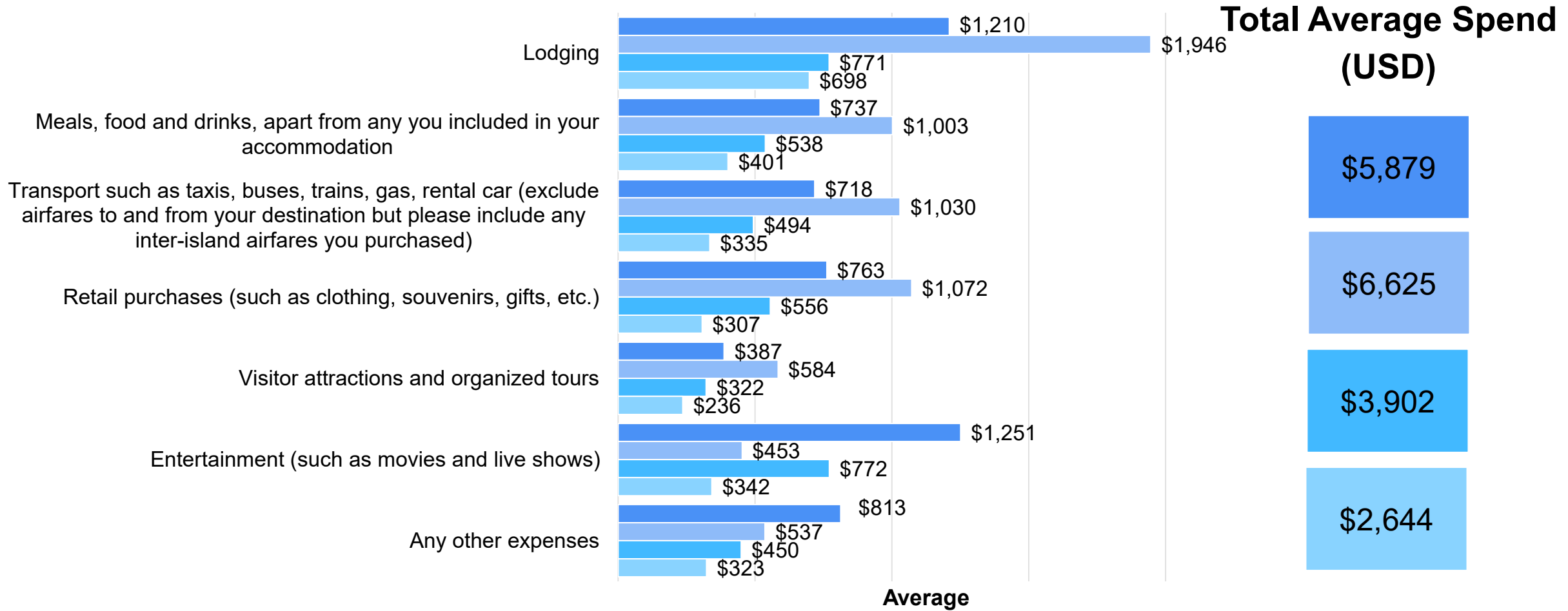


Sample Min. n=75

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	21.6%	New York	21.2%	New York	13.5%	New York	8.2%
Florida	13.2%	Florida	15.6%	Texas	9.9%	Texas	8.1%
Georgia	6.9%	Texas	6.9%	Florida	8.7%	Florida	7.5%
Texas	5.5%	Georgia	6.9%	Georgia	5.5%	Ohio	5.7%
Virginia	4.6%	Illinois	5.2%	Pennsylvania	5.1%	Pennsylvania	5.5%
Pennsylvania	4.3%	Oklahoma	5.2%	Ohio	5.1%	Georgia	4.9%
Massachusetts	4.3%	Pennsylvania	4.5%	California	4.6%	North Carolina	4.6%
California	4.0%	Massachusetts	4.5%	North Carolina	4.4%	California	4.4%
Illinois	3.5%	Washington	3.5%	Virginia	3.7%	Michigan	3.9%
North Carolina	3.1%	Virginia	3.5%	Massachusetts	2.8%	Illinois	3.8%
Sample Size:	n=138	Sample Size:	n=61	Sample Size:	n=508	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=138

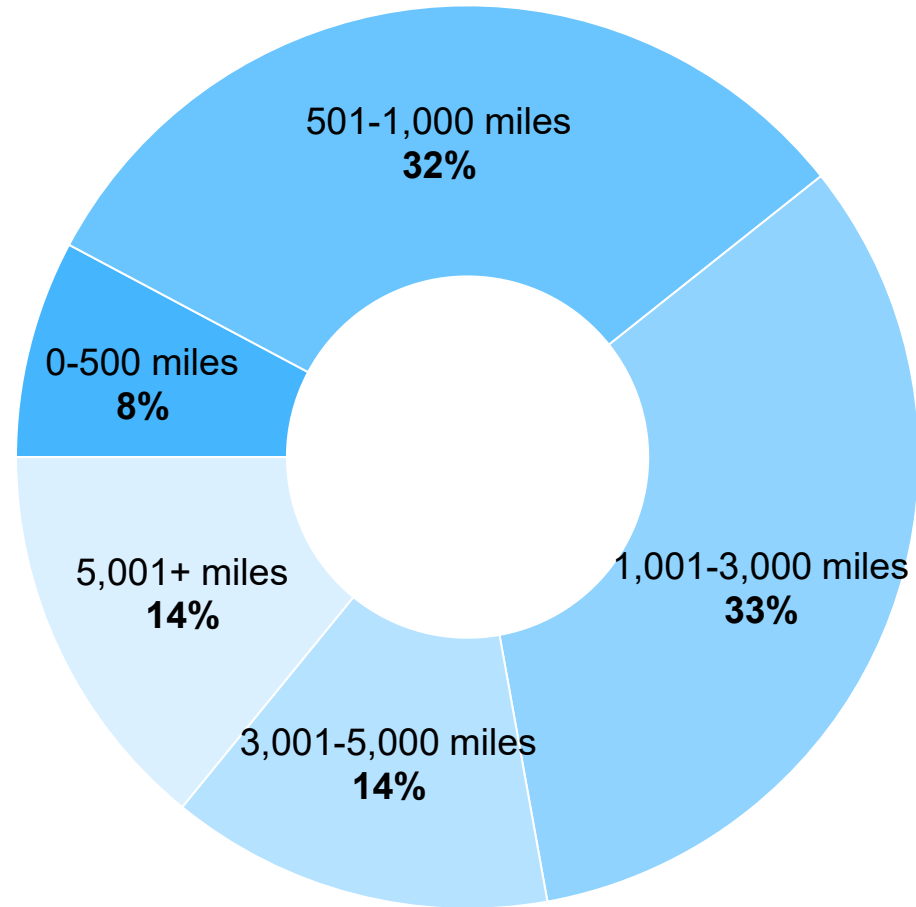
n=61

n=508

n=1,788

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

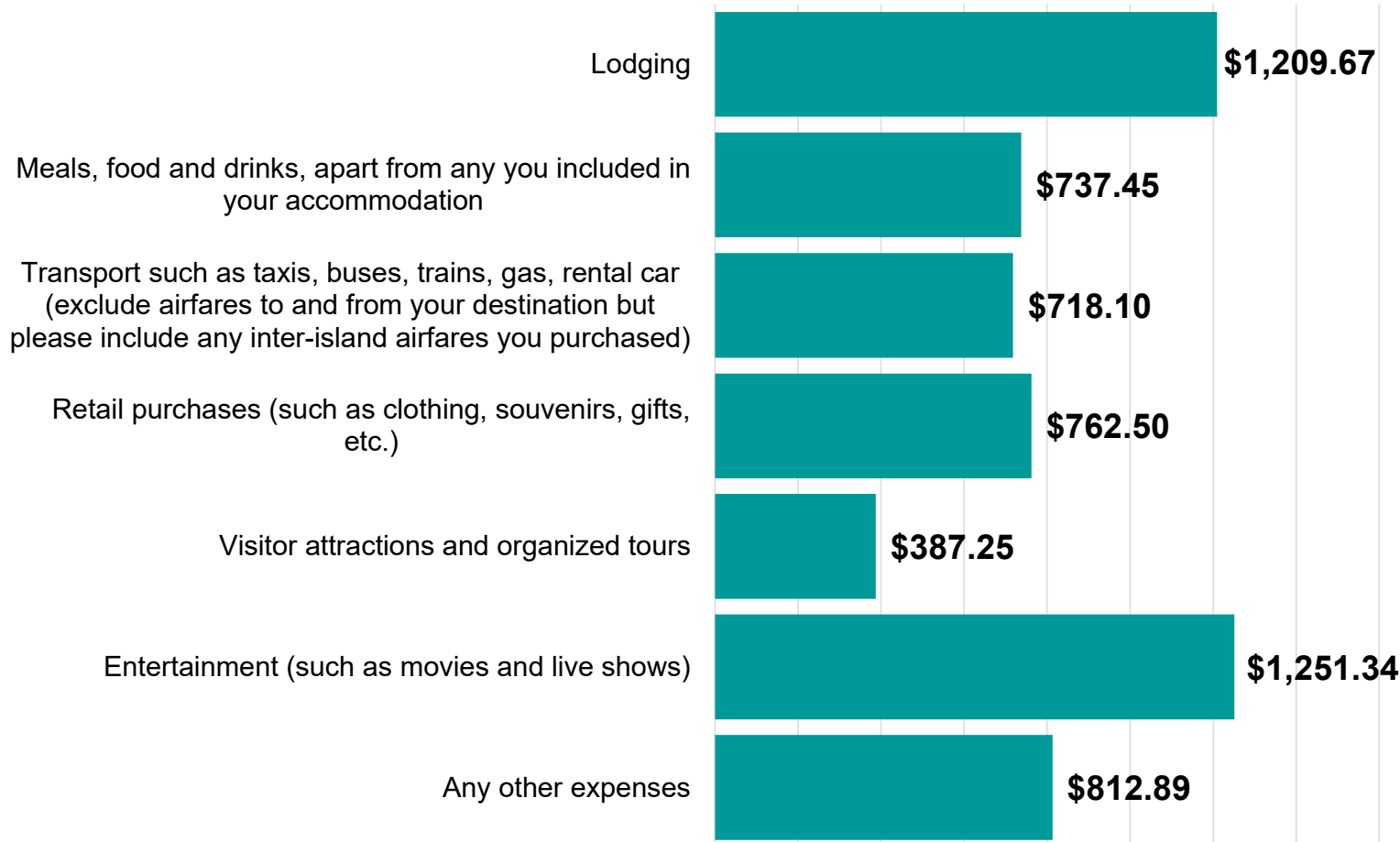
Distance Travelled on Annual Vacation



Sample Size: n=138

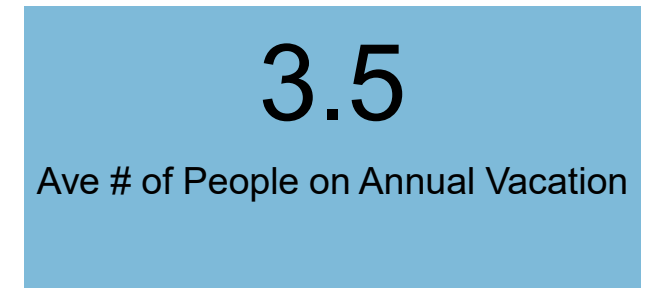
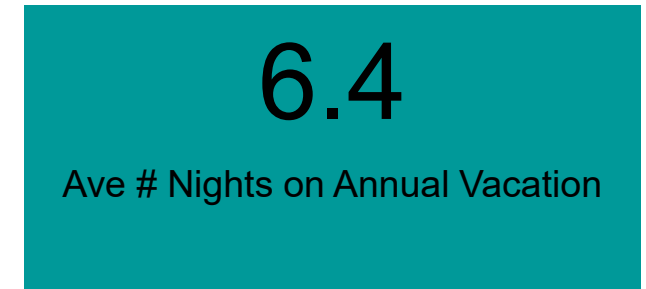
U.S. Avid Travelers \$100k+: Annual Vacation

Average Spend



Sample Size: n=138

Spend Per Person Per Day

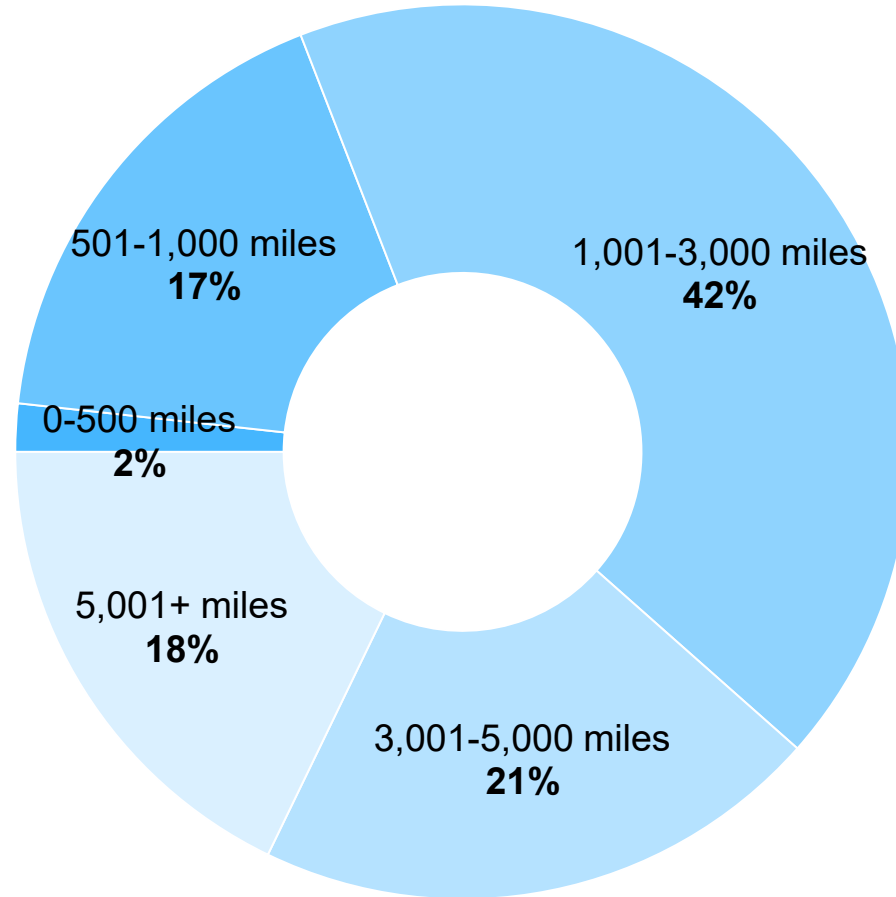


\$260.74

Ave. Per Person Per Day Spend

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

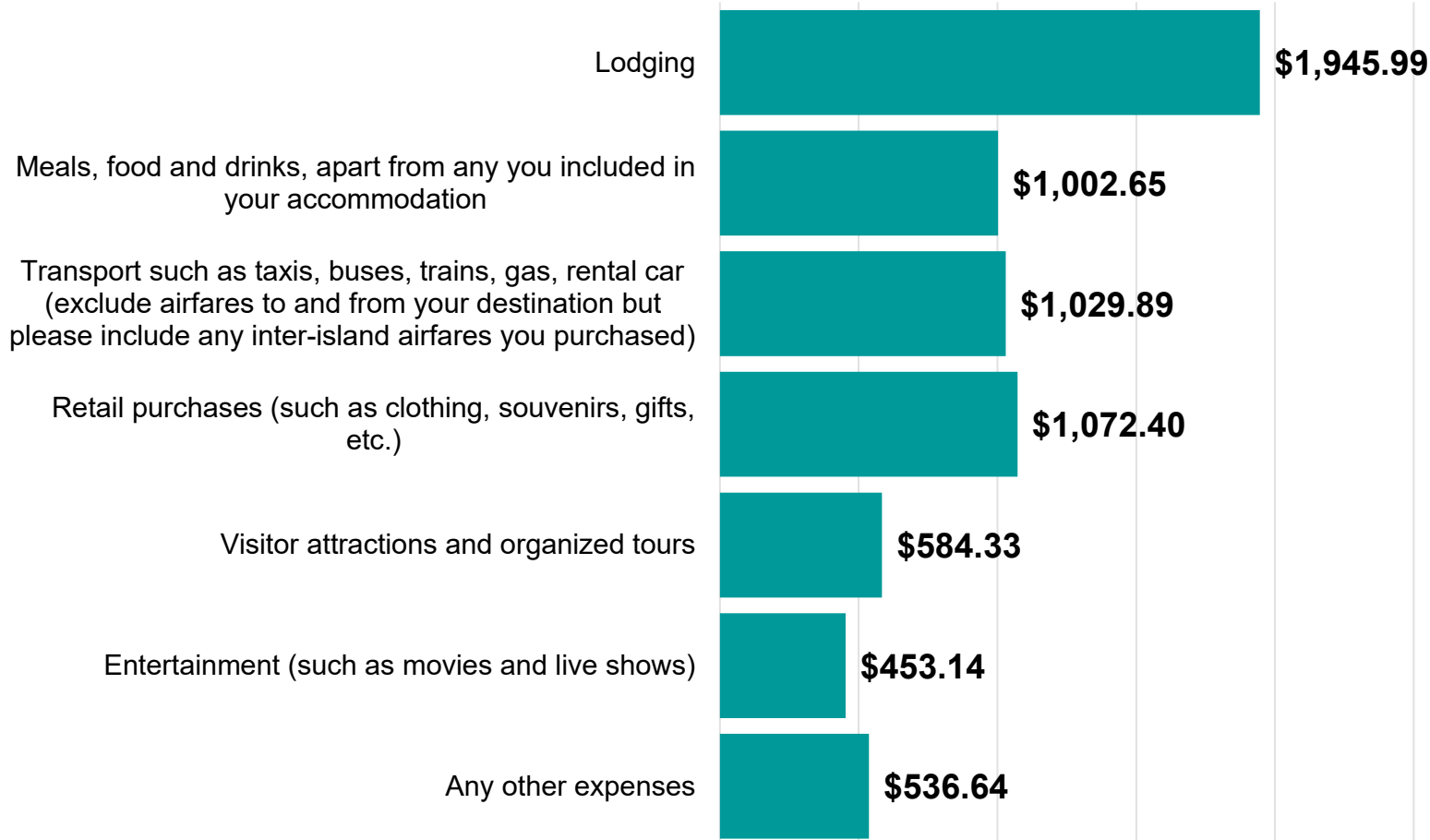
Distance Travelled on Annual Vacation



Sample Size: n=61

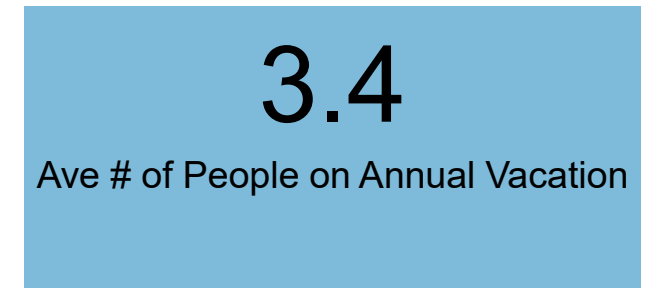
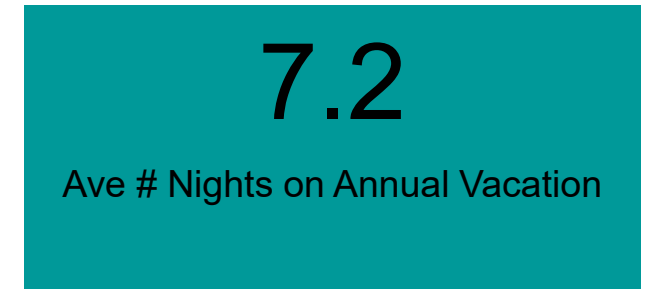
U.S. Avid Travelers \$150k+: Annual Vacation

Average Spend



Sample Size: n=61

Spend Per Person Per Day

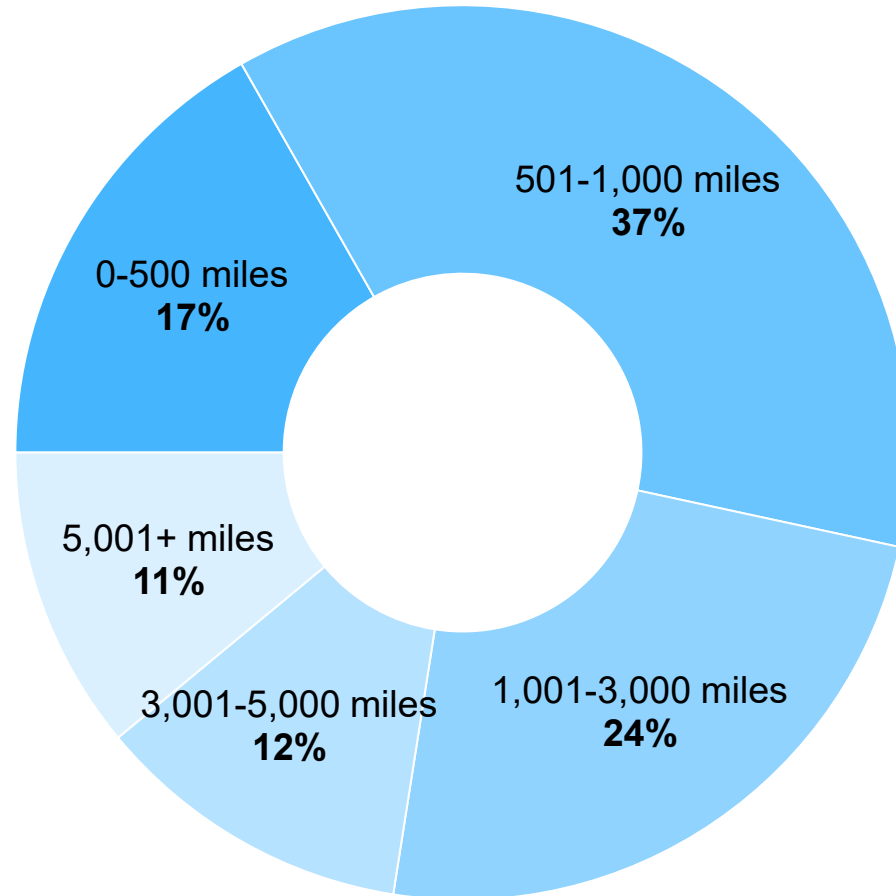


\$275.87

Ave. Per Person Per Day Spend

U.S. Long-Distance Travelers: Annual Vacation

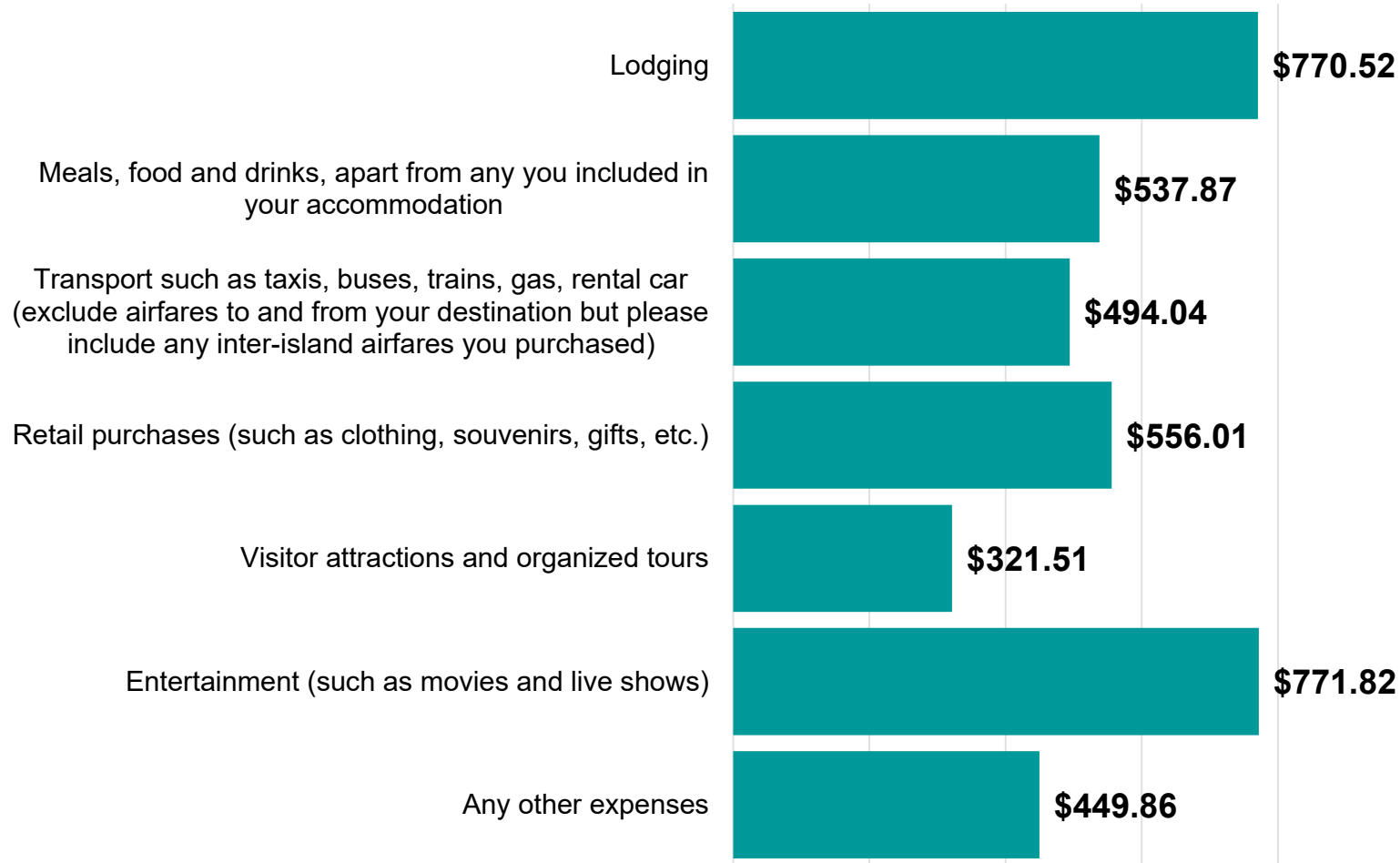
Distance Travelled on Annual Vacation



Sample Size: n=508

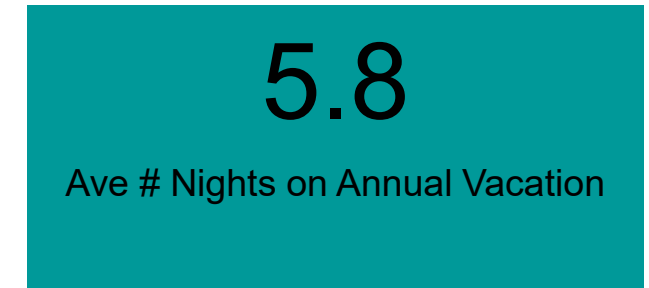
U.S. Long-Distance Travelers: Annual Vacation

Average Spend



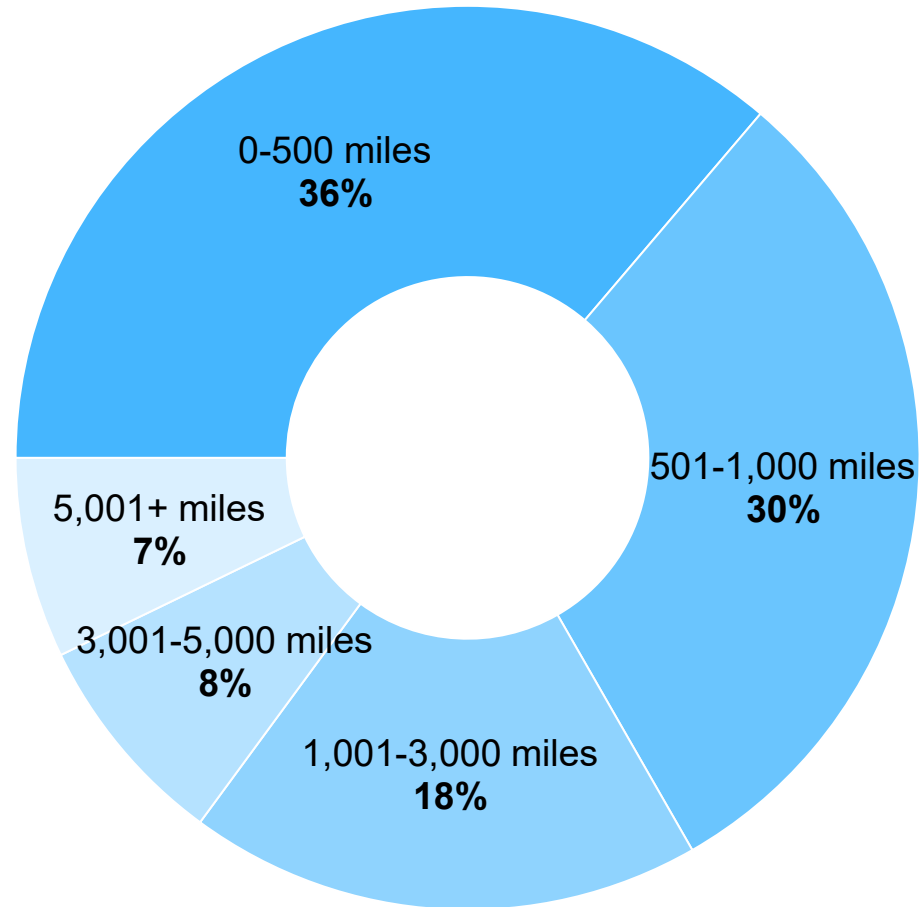
Sample Size: n=508

Spend Per Person Per Day



U.S. Nat Rep: Annual Vacation

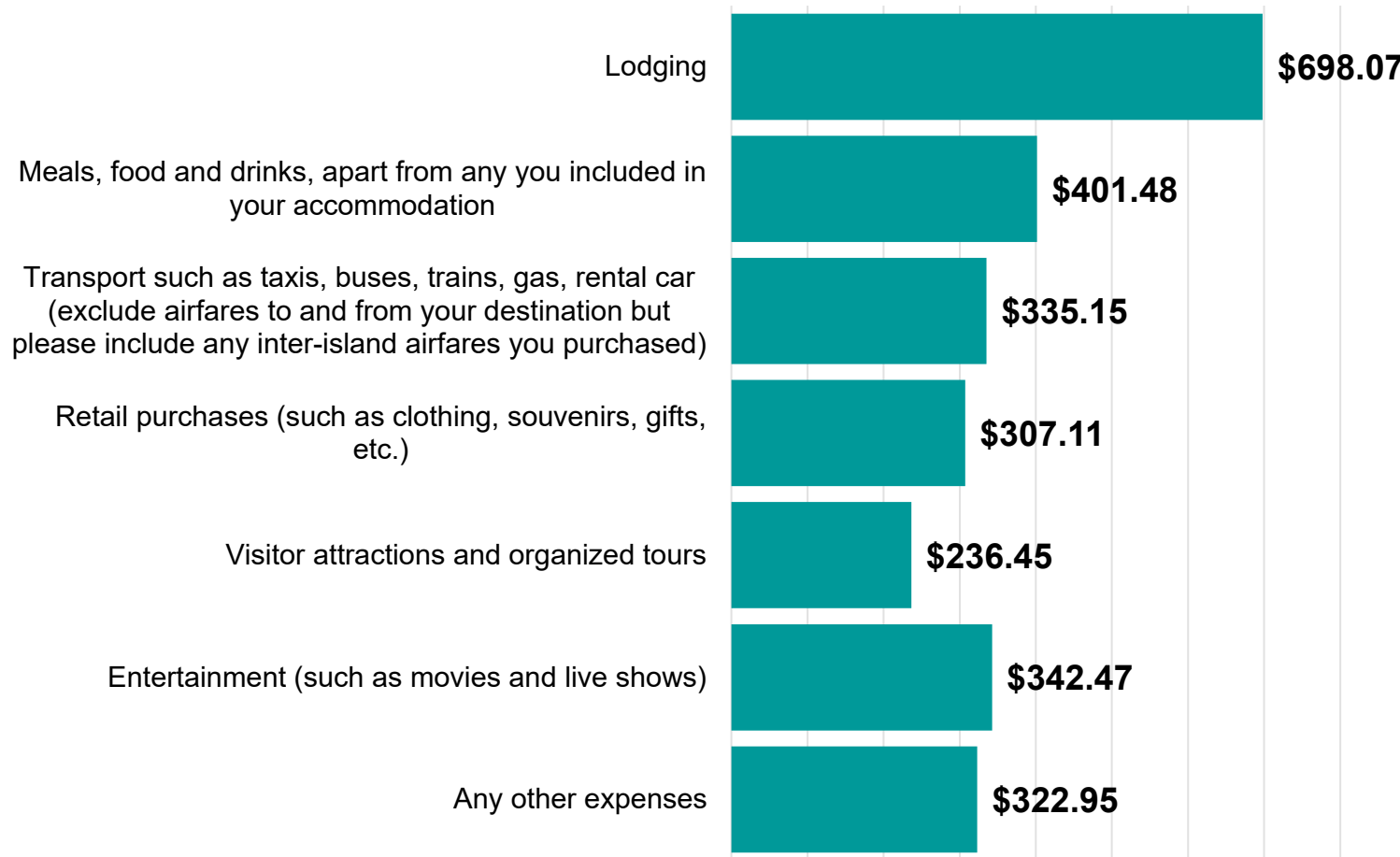
Distance Travelled on Annual Vacation



Sample Size: n=1,788

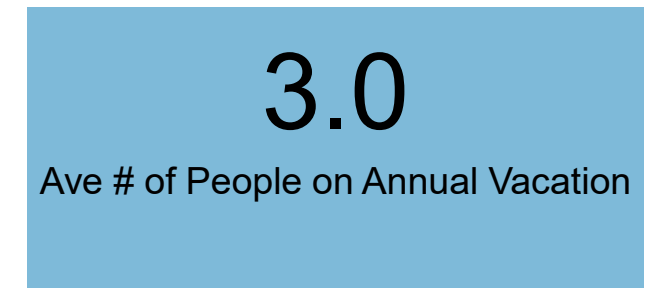
U.S. Nat Rep: Annual Vacation

Average Spend



Sample Size: n=1,788

Spend Per Person Per Day



\$164.86

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	48%	48%	42%	49%
Value for money	53%	52%	48%	54%
Entertainment and nightlife	44%	51%	40%	32%
Consideration of sustainable principles	31%	32%	31%	26%
Natural attractions/activities	39%	43%	42%	43%
Cultural attractions	48%	59%	40%	37%
Opportunity to experience local restaurants/businesses	42%	43%	39%	39%
Family-friendly location and activities	40%	43%	38%	40%
Safe and Secure Destination	51%	53%	45%	56%

Sample Size:

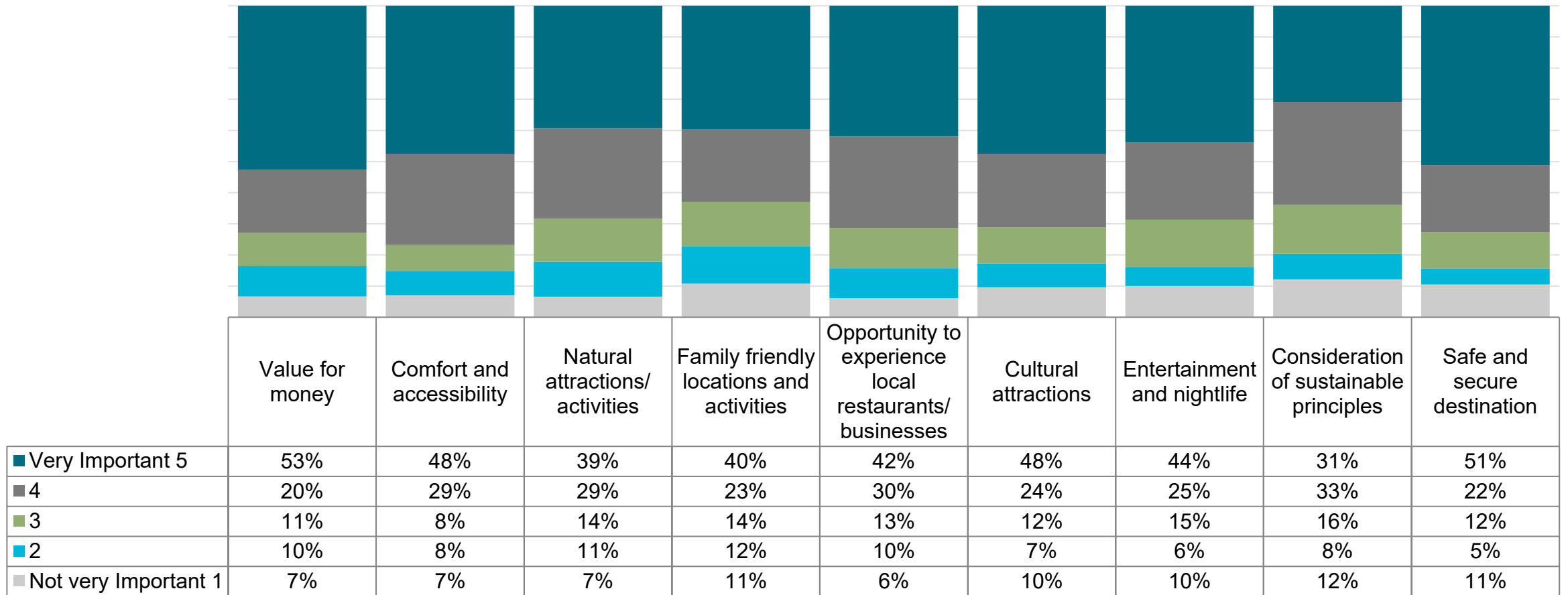
n=138

n=61

n=508

n=1,788

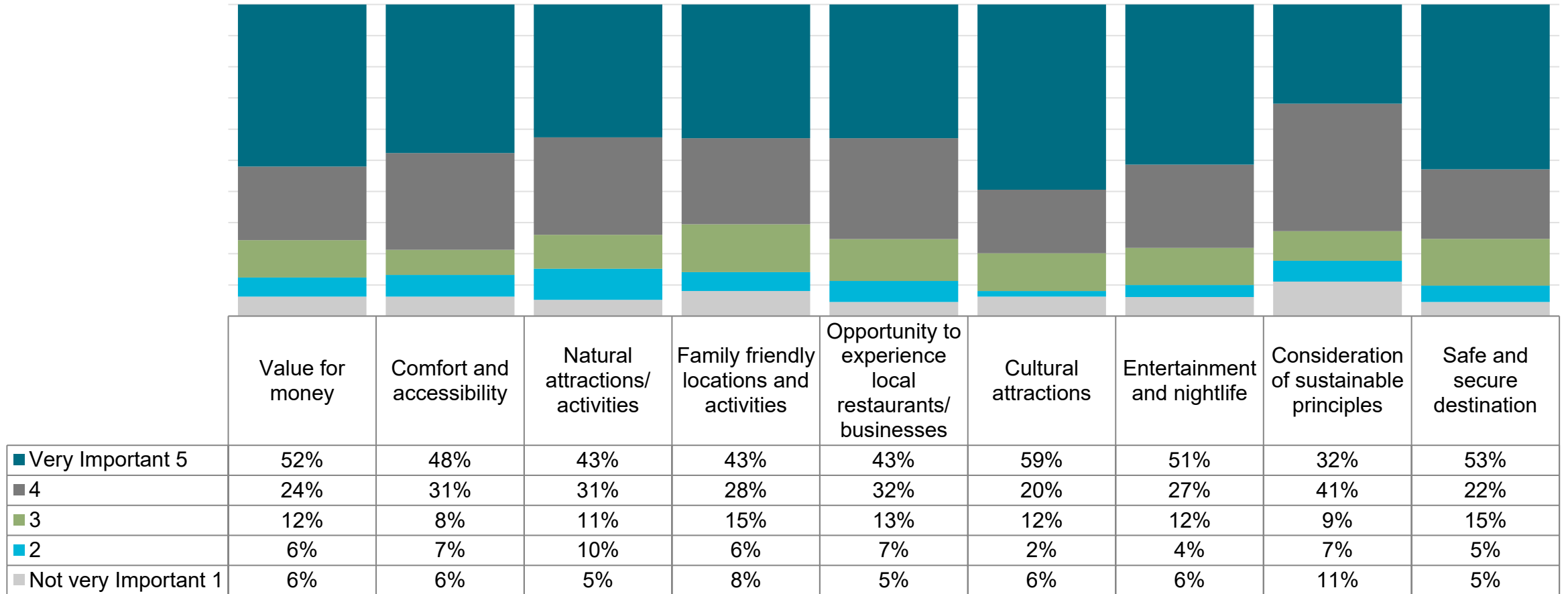
U.S. Avid Travelers \$100k+: Importance of Travel Factors



Not very Important 1
 2
 3
 4
 Very Important 5

Sample Size: n=138

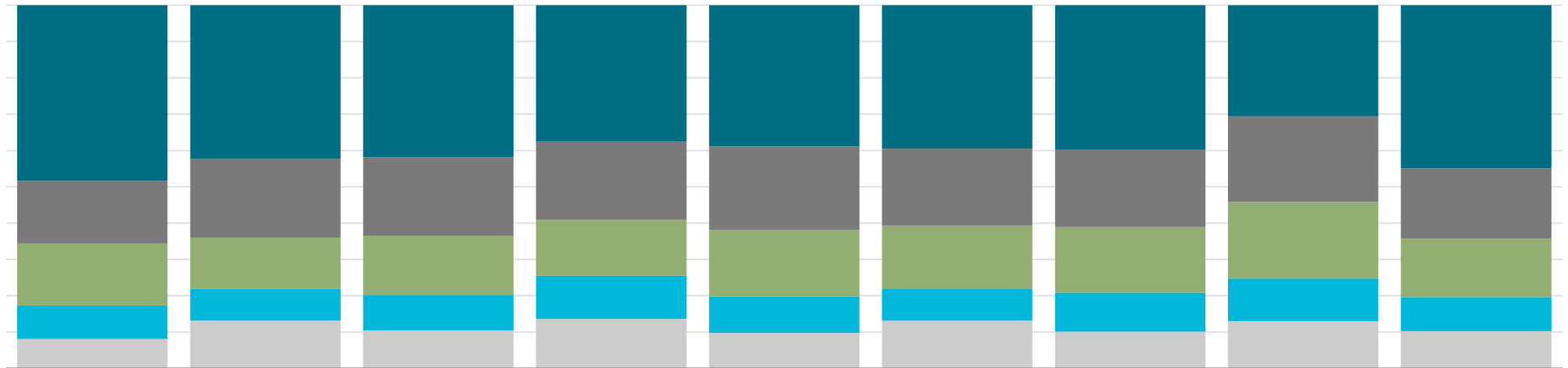
U.S. Avid Travelers \$150k+: Importance of Travel Factors



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

Sample Size: n=61

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

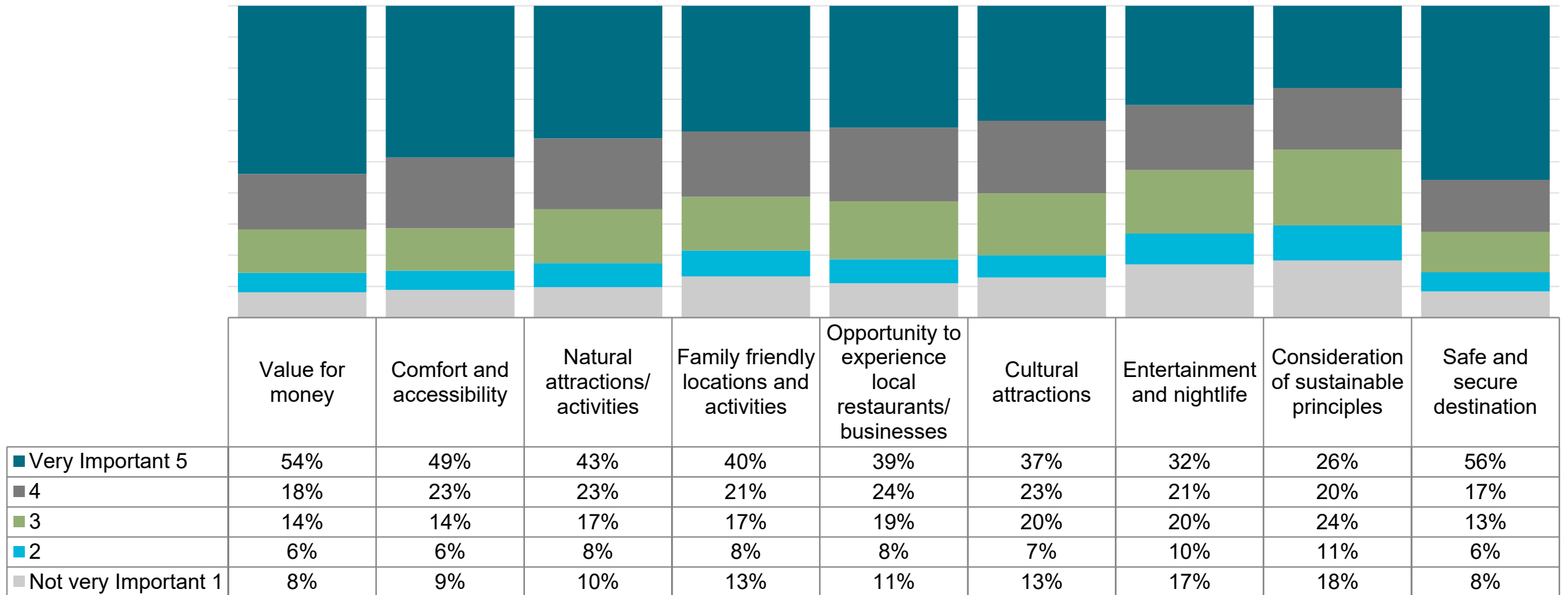


	Value for money	Comfort and accessibility	Natural attractions/activities	Family friendly locations and activities	Opportunity to experience local restaurants/businesses	Cultural attractions	Entertainment and nightlife	Consideration of sustainable principles	Safe and secure destination
Very Important 5	48%	42%	42%	38%	39%	40%	40%	31%	45%
4	17%	22%	22%	22%	23%	21%	21%	24%	19%
3	17%	14%	16%	15%	18%	17%	18%	21%	16%
2	9%	9%	10%	12%	10%	9%	11%	12%	9%
Not very Important 1	8%	13%	10%	14%	10%	13%	10%	13%	10%

Not very Important 1
 2
 3
 4
 Very Important 5

Sample Size: n=508

U.S. Nat Rep: Importance of Travel Factors

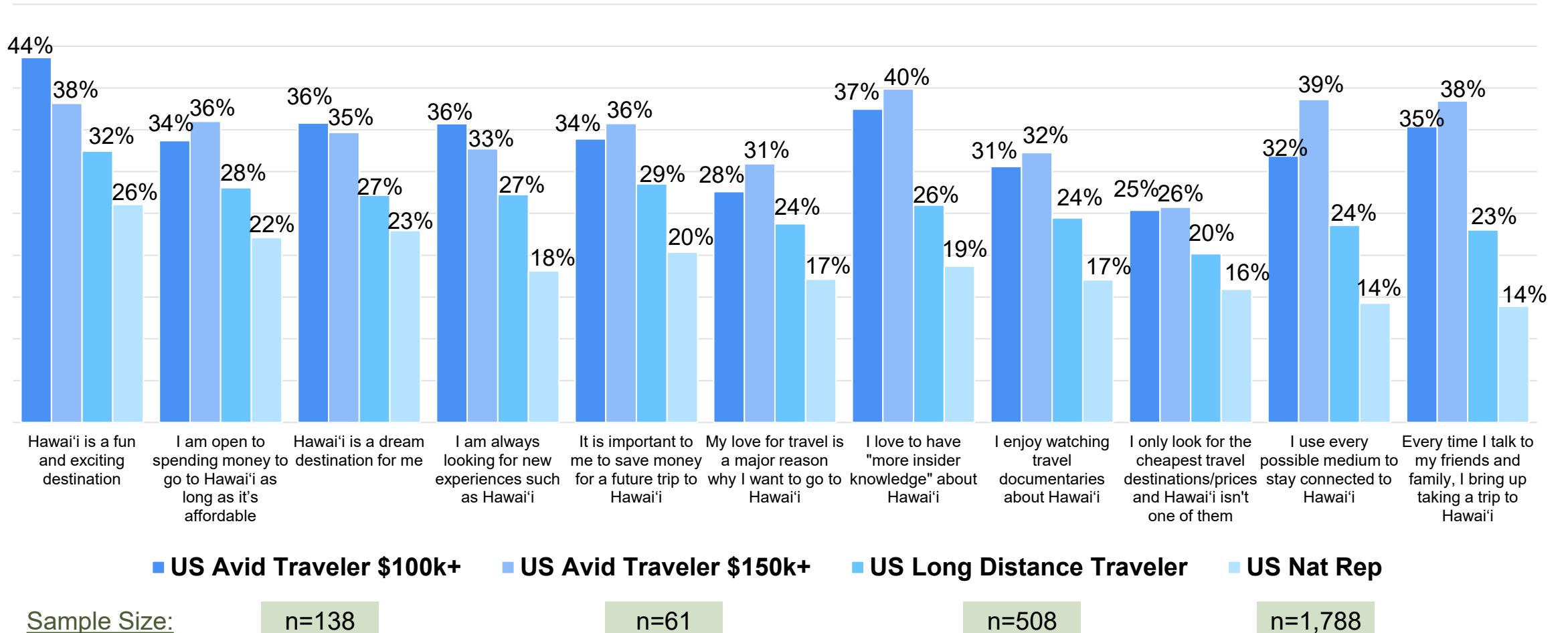


Not very Important 1
 2
 3
 4
 Very Important 5

Sample Size: n=1,788

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

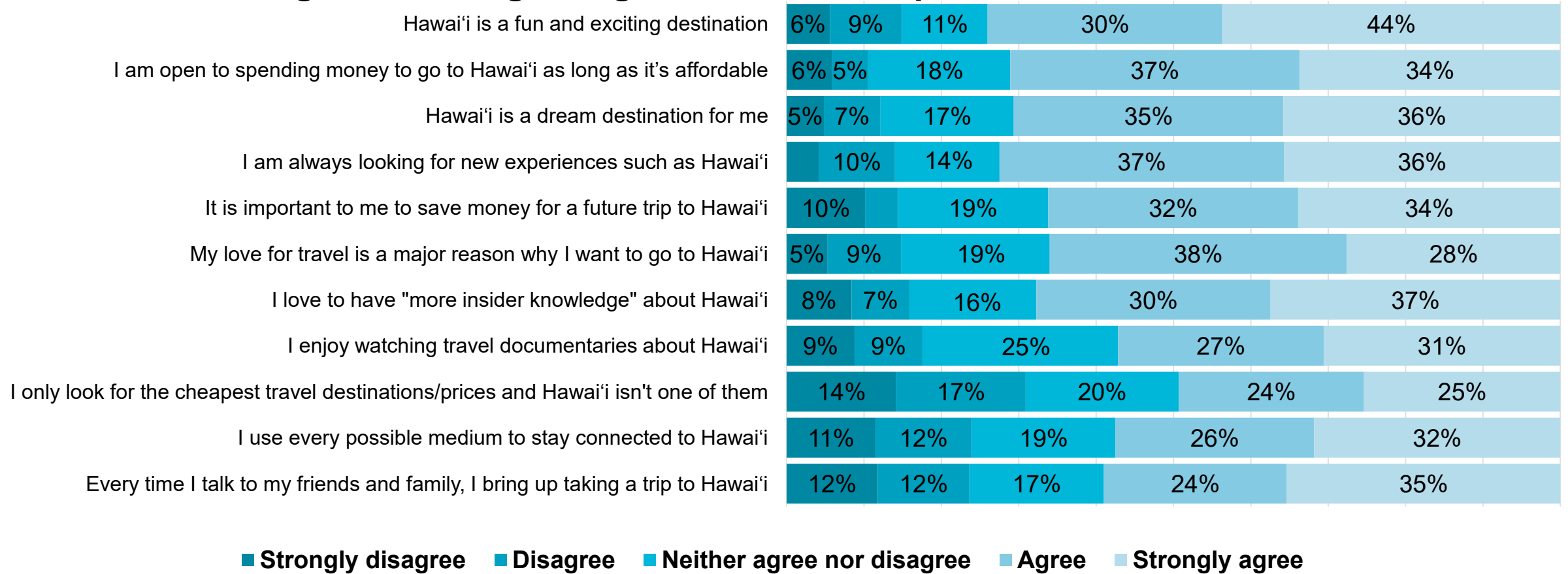
Agreement Regarding Hawai'i as a Travel Destination (Strongly Agree)



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

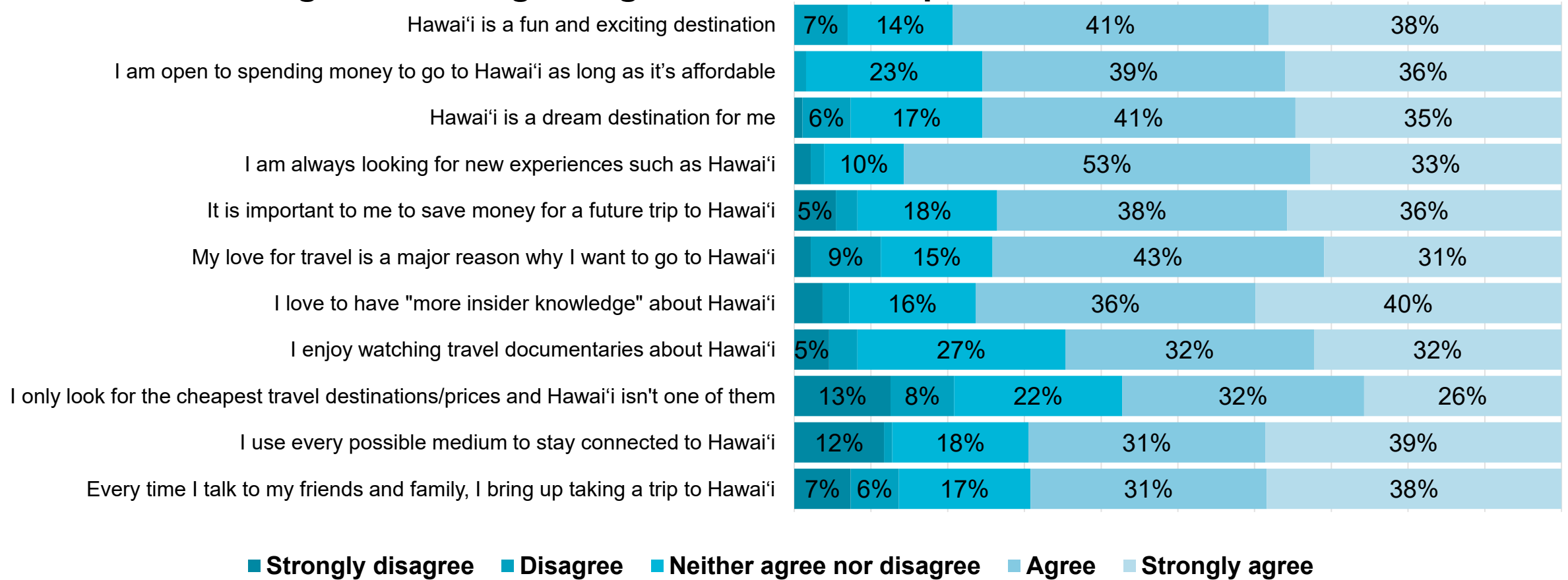
Agreement Regarding Hawai'i as an Aspirational Destination



Sample Size: n=138

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

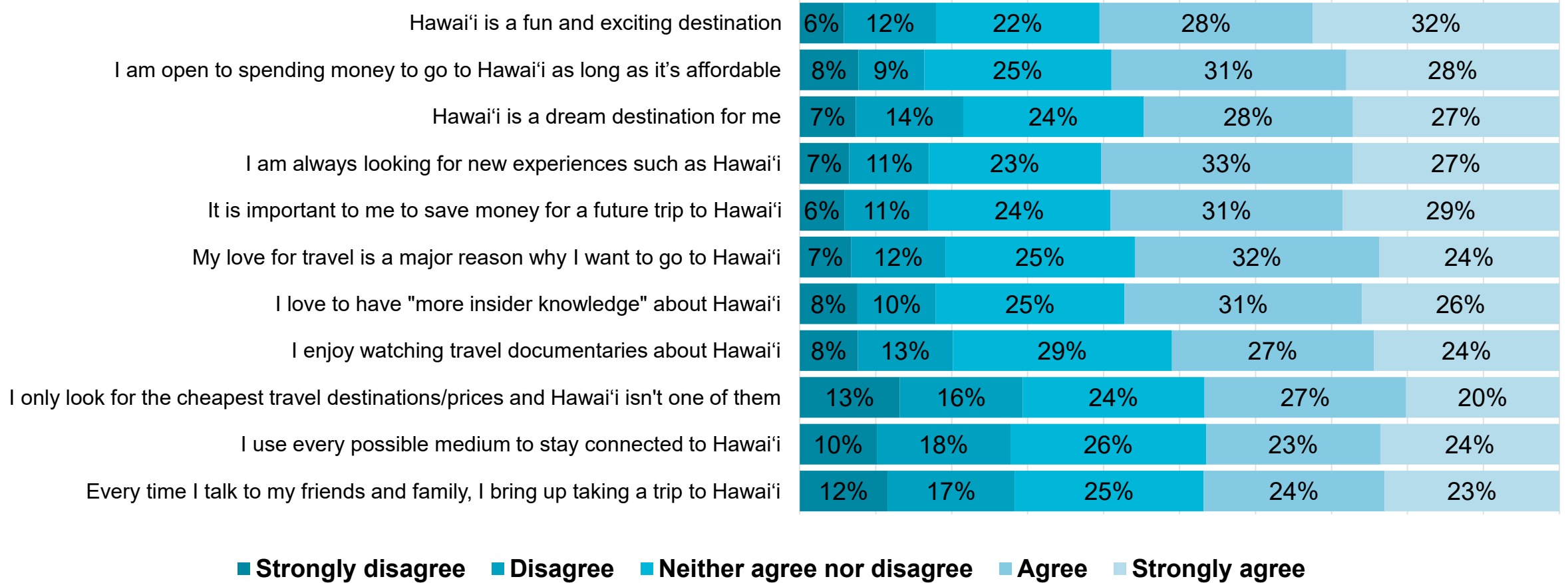
Agreement Regarding Hawai'i as an Aspirational Destination



Sample Size: n=61

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

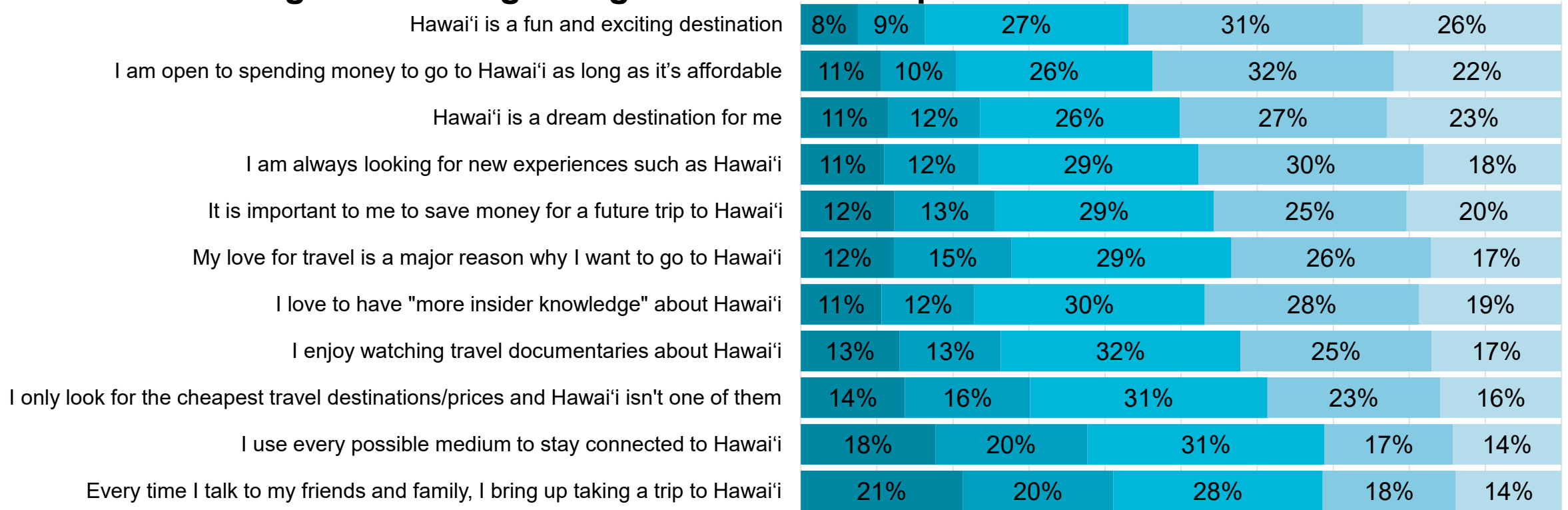
Agreement Regarding Hawai'i as an Aspirational Destination



Sample Size: n=508

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

Agreement Regarding Hawai'i as an Aspirational Destination

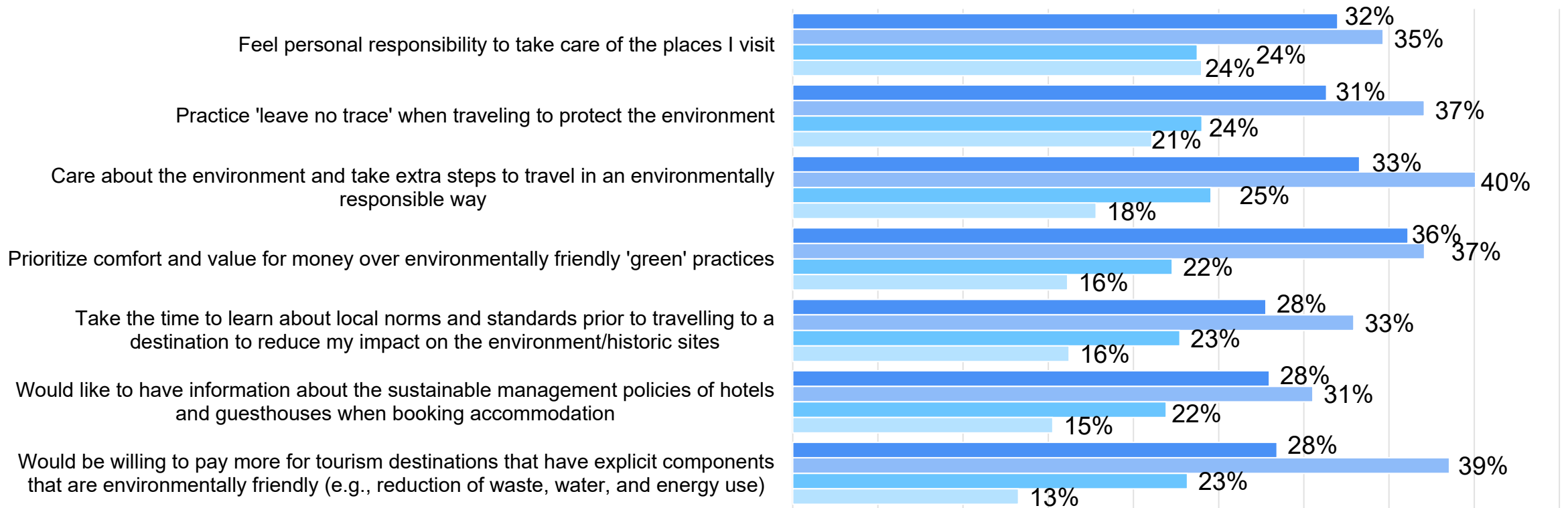


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

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=138

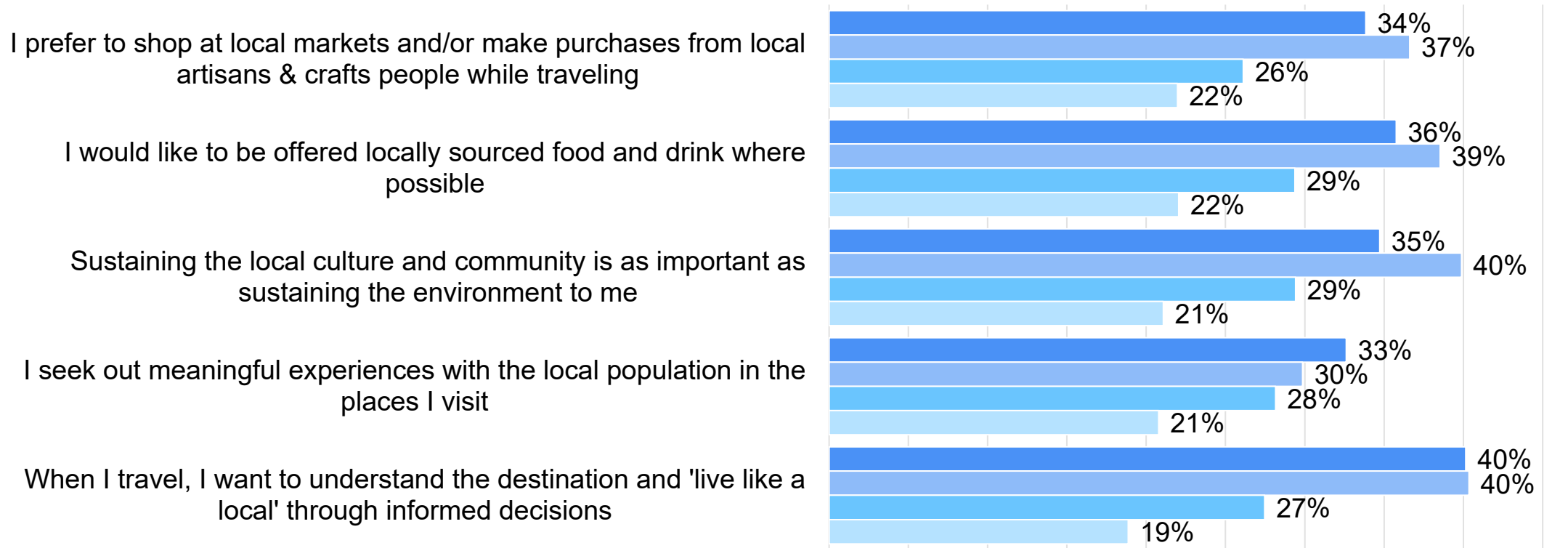
n=61

n=508

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=138

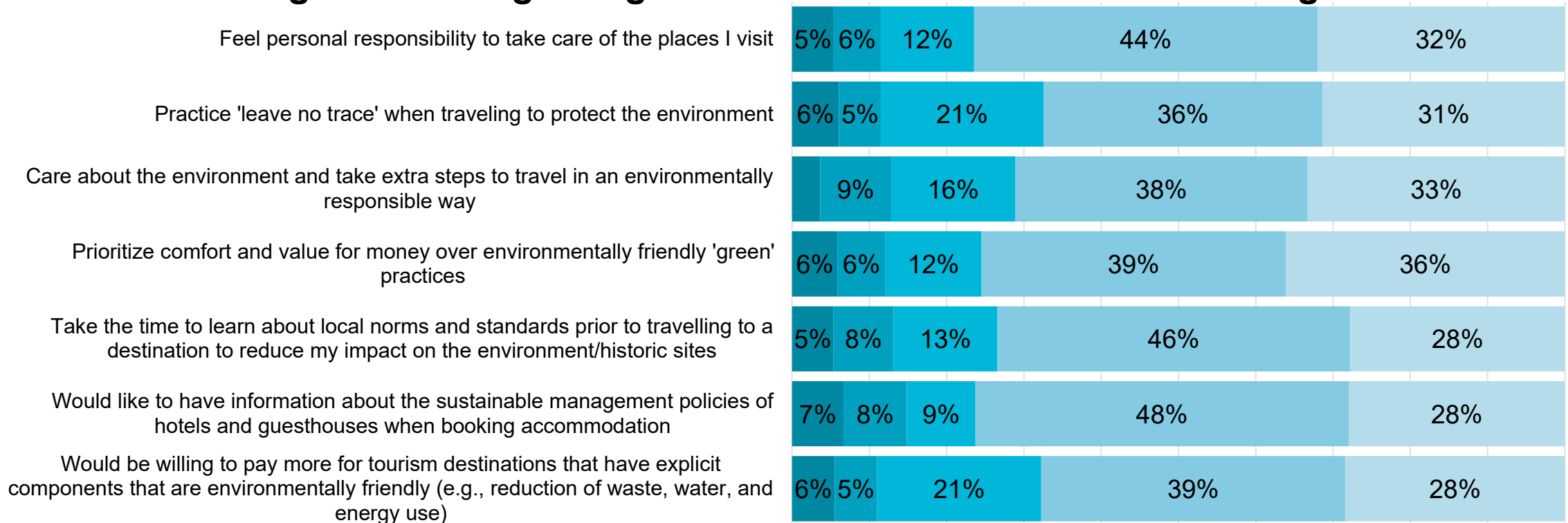
n=61

n=508

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=138

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

Agreement Regarding Sustaining Local Culture While Traveling

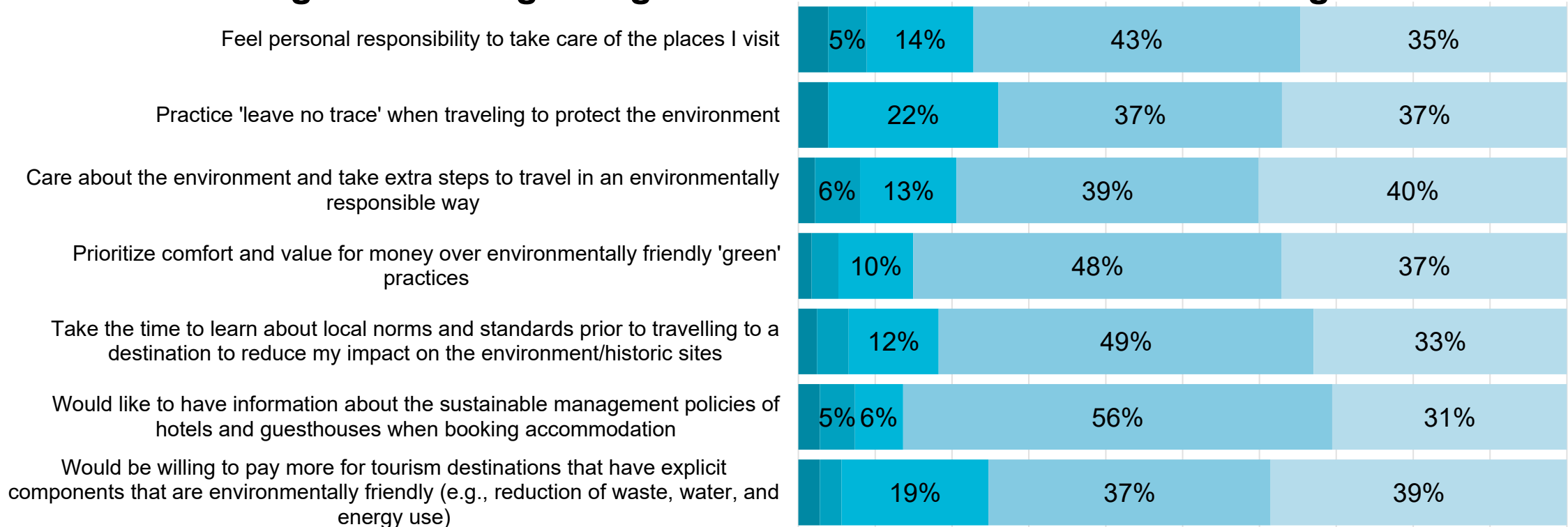


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=138

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

Agreement Regarding Sustainable Practices While Traveling

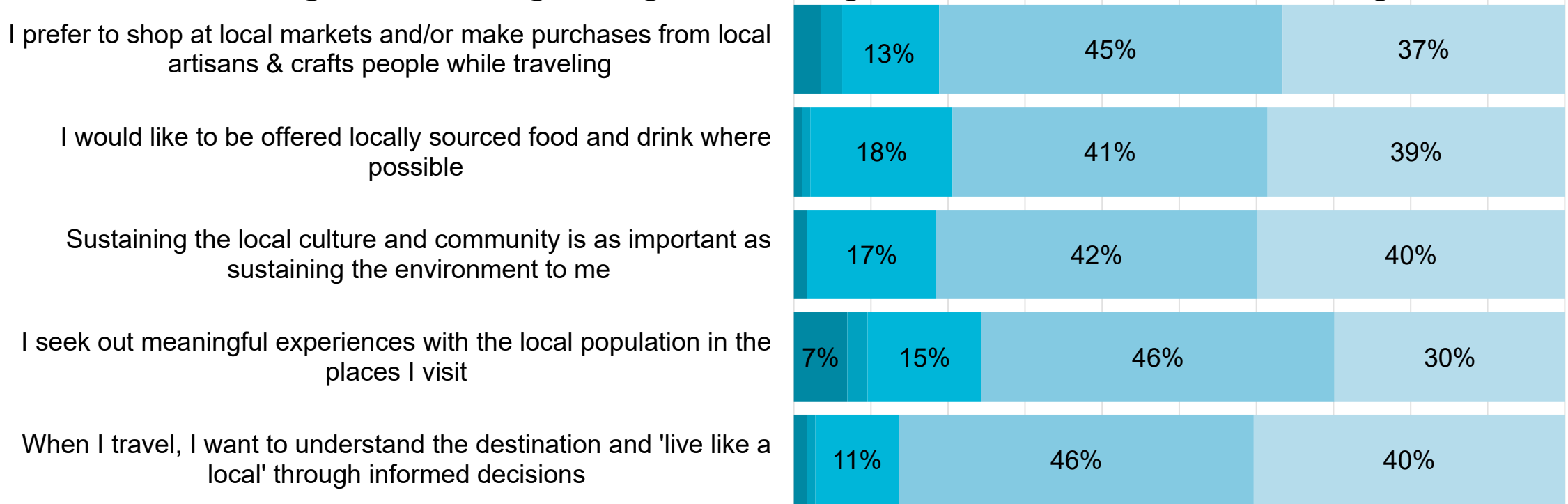


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=61

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

Agreement Regarding Sustaining Local Culture While Traveling

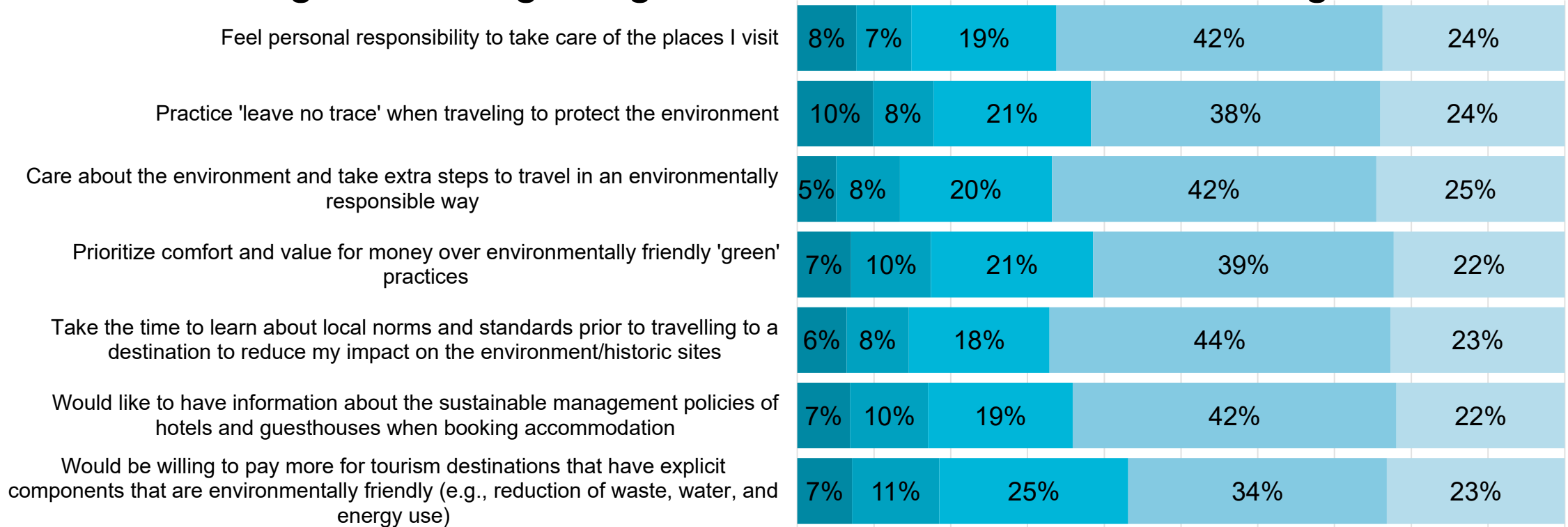


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=61

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=508

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

Agreement Regarding Sustaining Local Culture While Traveling

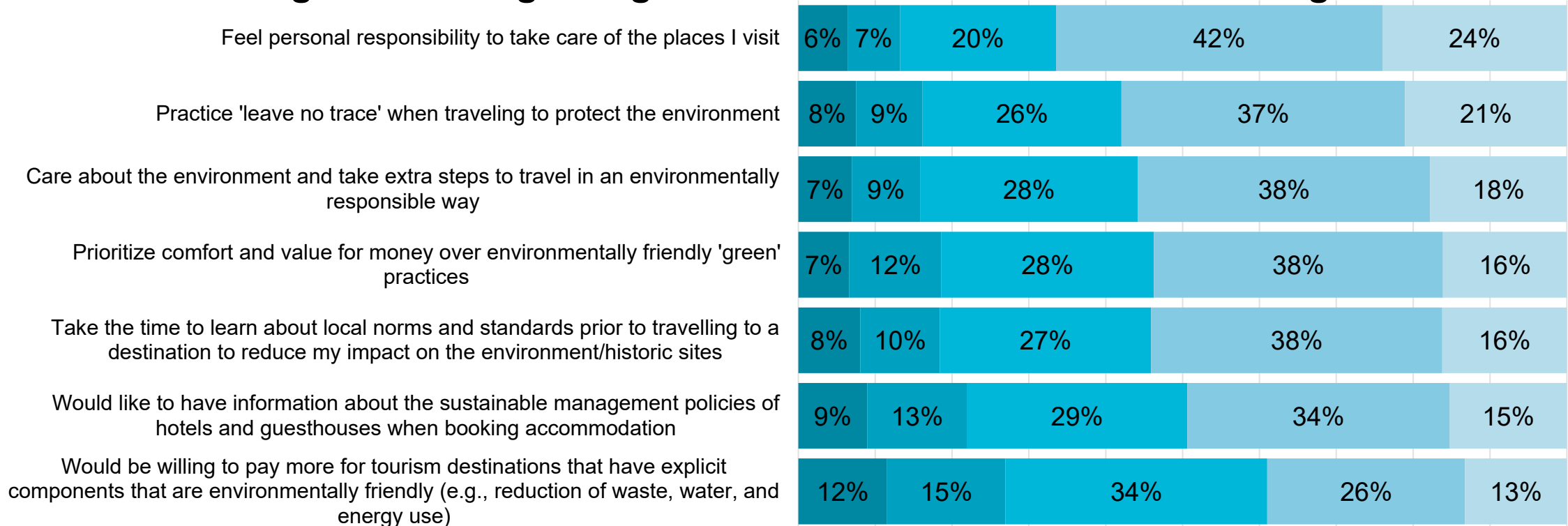


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=508

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

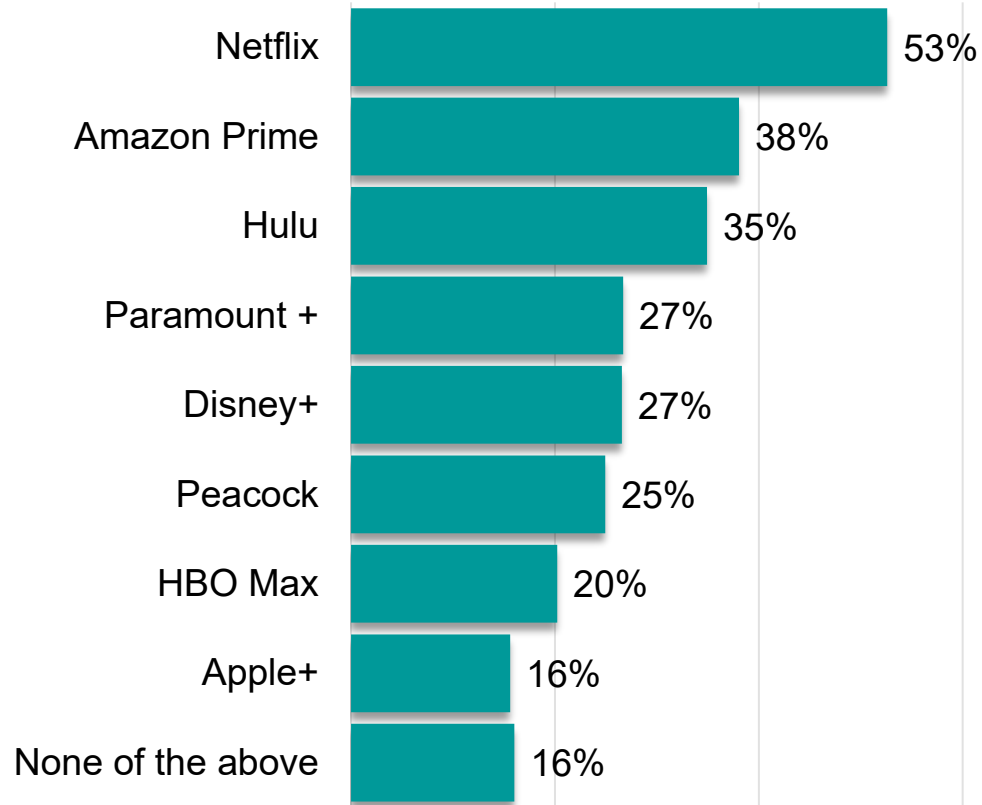


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

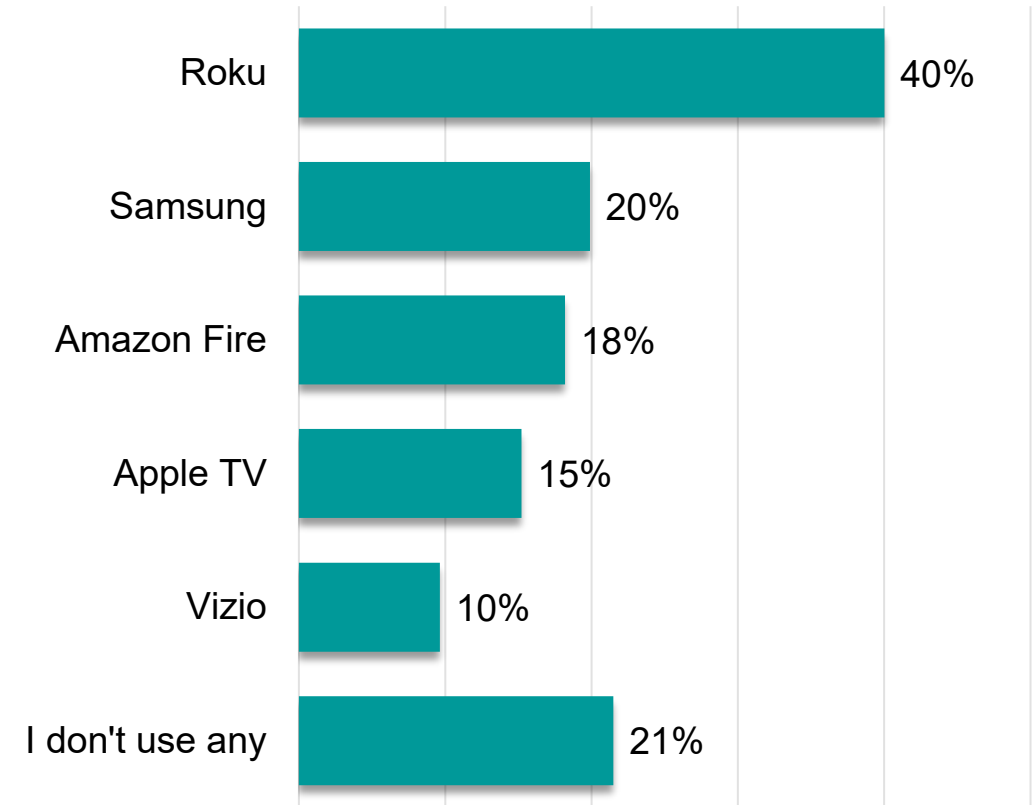
Sample Size: n=1,788

U.S. Media Consumption

Streaming Platforms Used Weekly



Connected Device Used

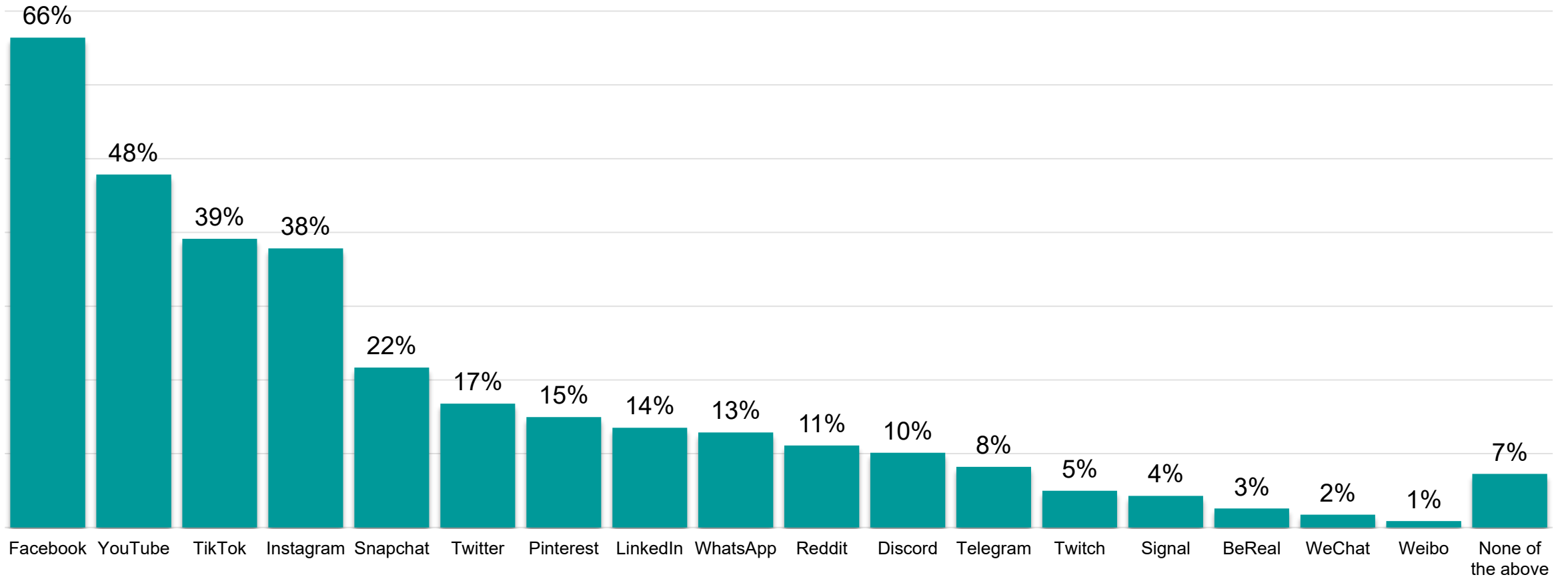


Sample Size: n=1,788

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

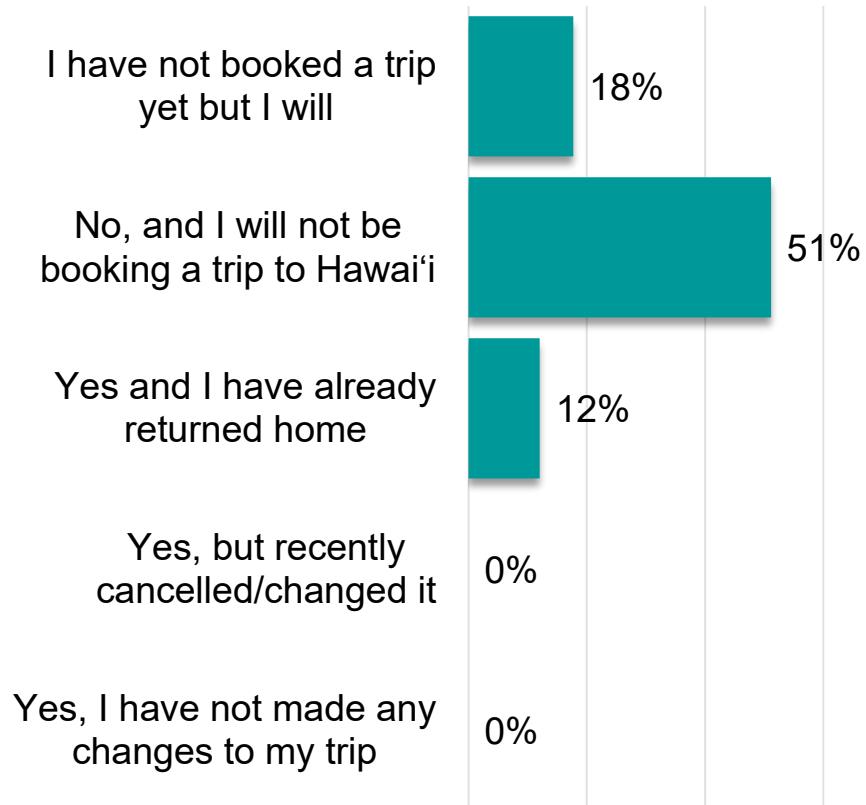
Friends/Family	38%
Online	29%
Social Media	43%
TV commercials	27%
YouTube	33%
TV Program/Documentary	16%
Email	14%
Radio	9%
Newspaper	7%
Out of home advertising (e.g. Poster Billboards, bus shelter advertisements, etc.)	5%
I don't recall	14%

Actions Taken After Seeing an Ad for a Destination

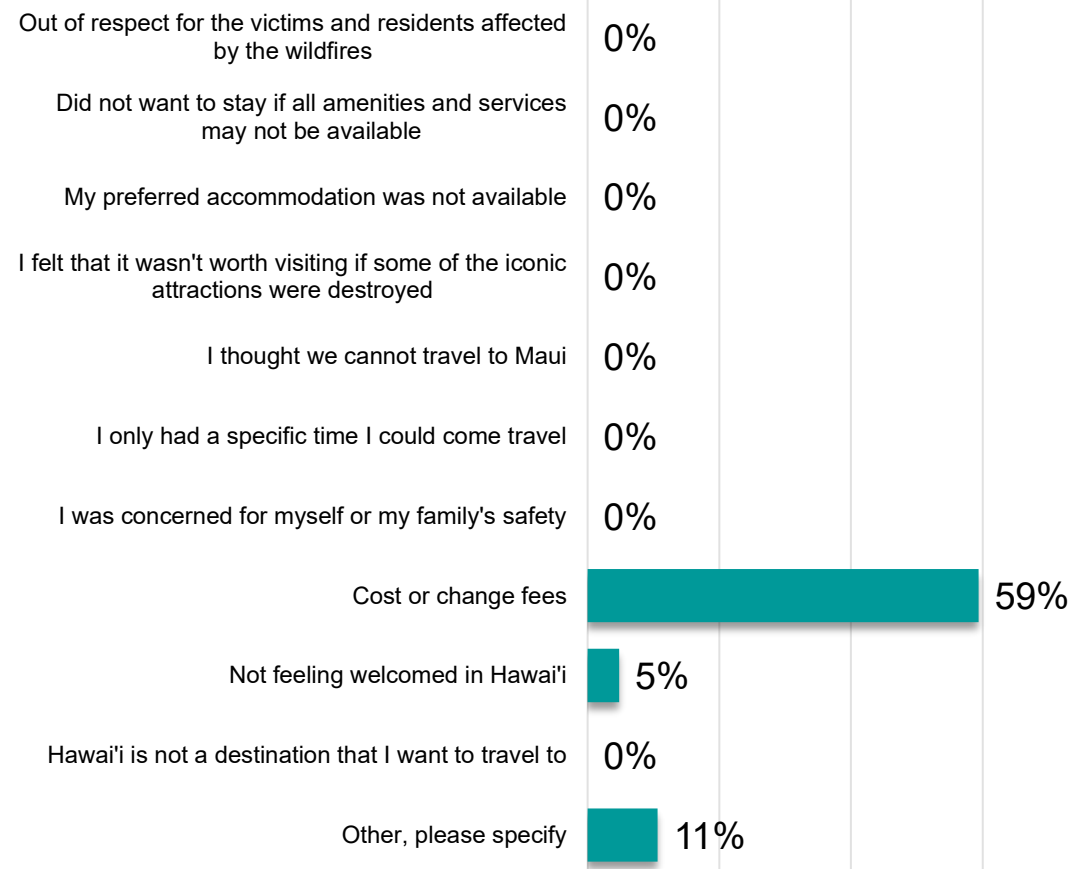
I search for information about the destination online	33%
I talk to friends/family about the destination	27%
I go to the destination's website	25%
I look up the destination on social media	20%
I book travel to the destination almost immediately	9%
I don't do anything	16%
None of the above	15%

Sample Size: n=1,788

U.S. - Hawai'i Booking Intent



Sample Size: n=1,788

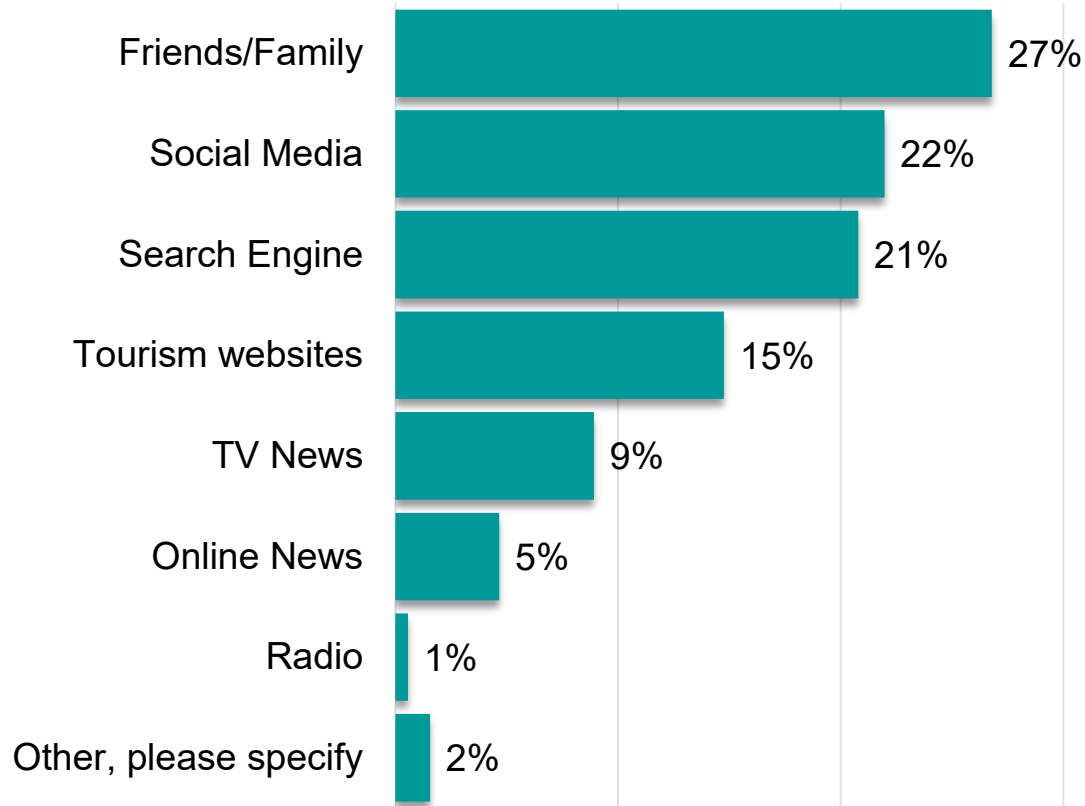


Sample Size: n=932

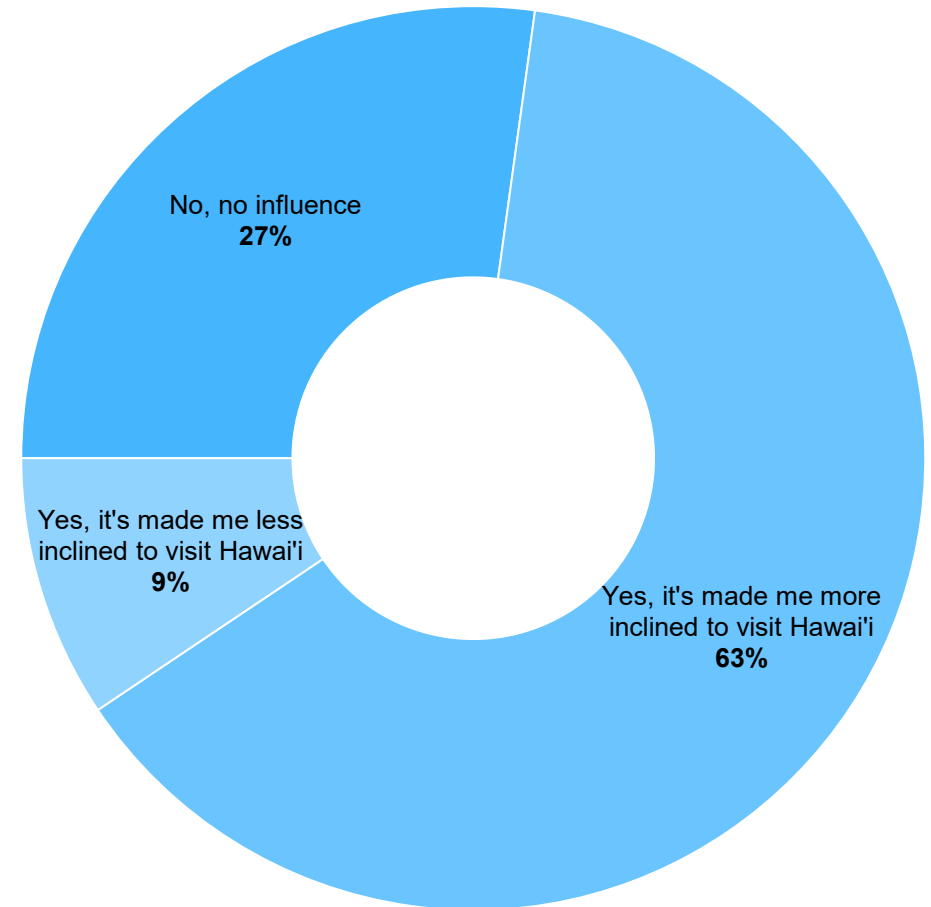
Are you planning to book a trip to the Hawai'i Islands this year? | What factors informed your ultimate choice to delay or otherwise not visit the Hawaiian Islands? Please select all that apply.

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

Primary Info Source When Researching the Hawaiian Islands



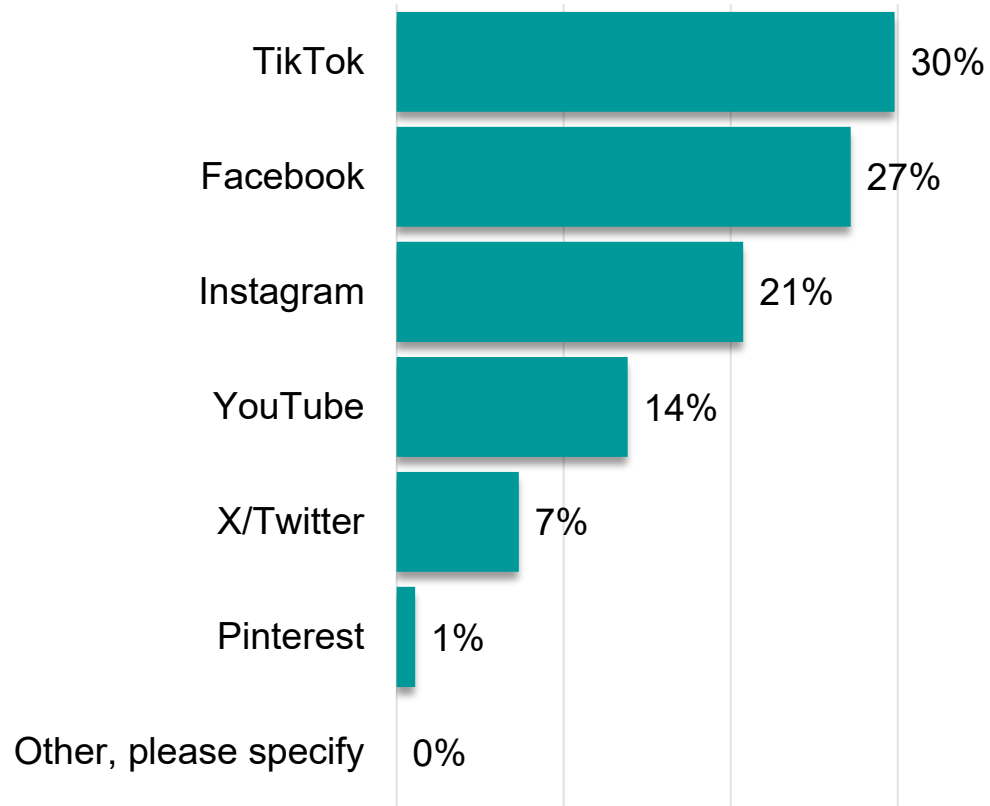
Influence on Vacation



Sample Size: n=856

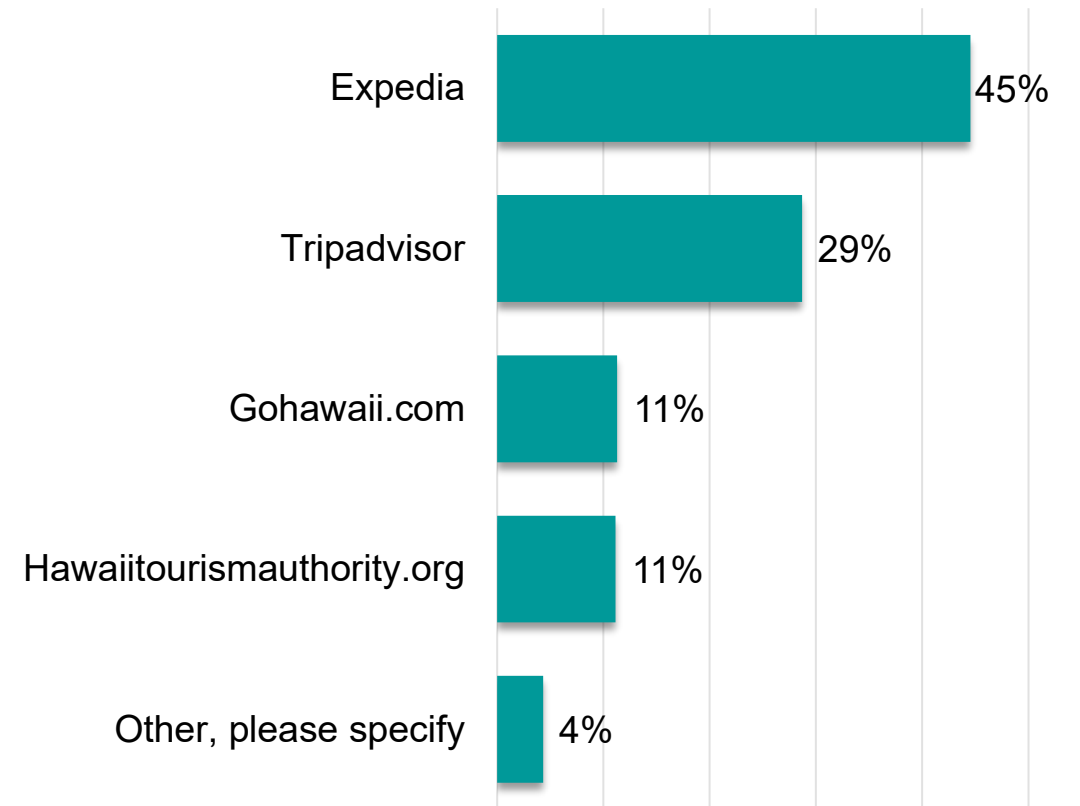
U.S. - State of Hawai'i Information Sources

Social Media Utilized Most



Sample Size: n=184

Tourism Websites Utilized Most



Sample Size: n=130

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