



Vision Insights U.S. Traveler Profiles September 2023

October 20, 2023

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
 - Most recent leisure destination was Hawai'i or Alaska
 - Next leisure destination is 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
- Under the age of 55

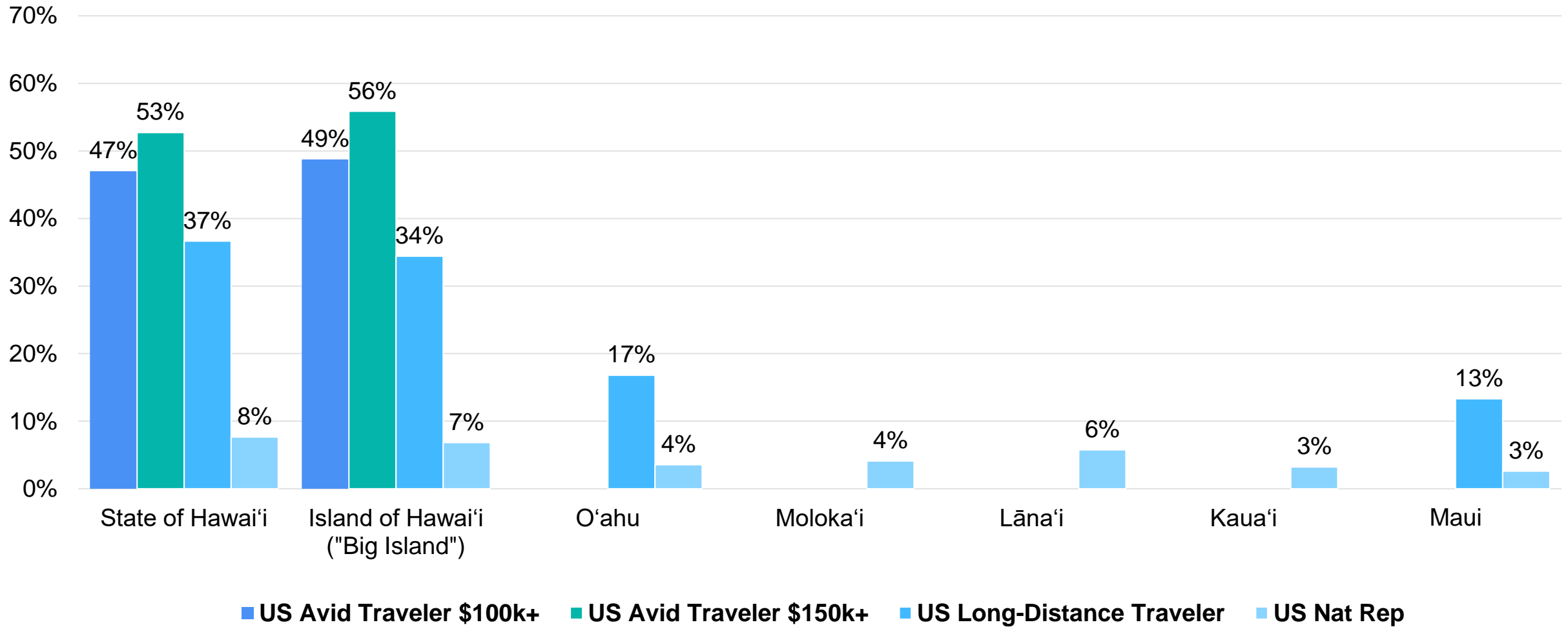
Avid Traveler \$150k+

- Gross household income is \$150k+
- 2+ persons per household
- 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
 - Most recent leisure destination was Hawai'i or Alaska
 - Next leisure destination is Hawai'i or Alaska

Nationally Representative Sample (Nat Rep)

- Representative of U.S. adults in terms of age, gender, social class and education

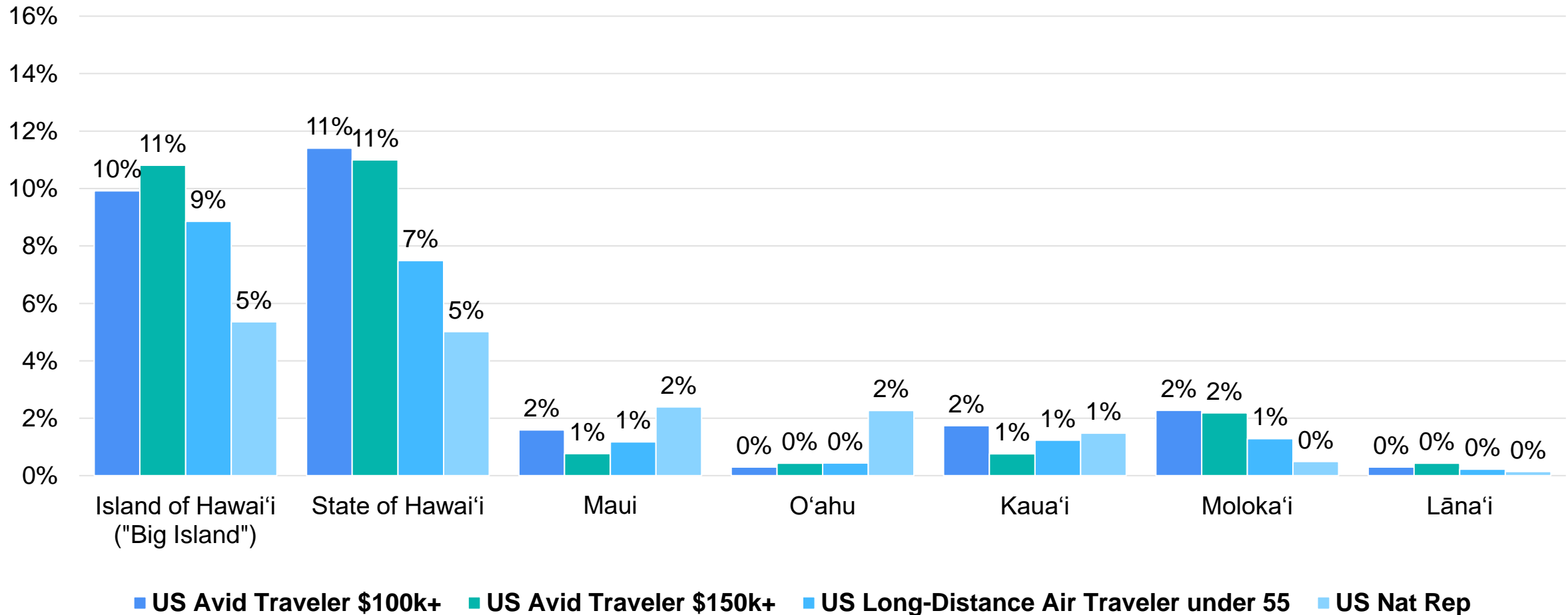
U.S. - Leisure Trip In Past 12 Months



Sample Min. n=75

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

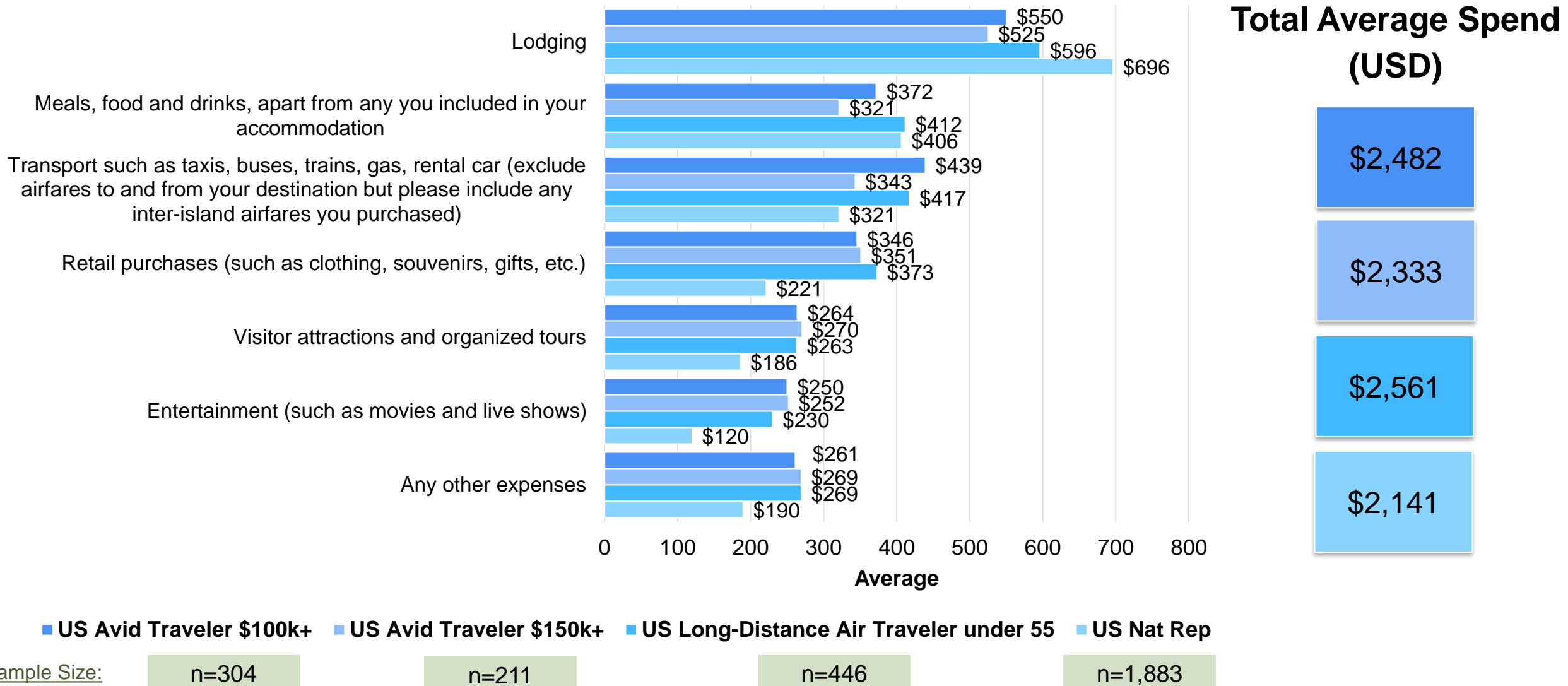


Sample Min. n=75

Top 10 States of Residence by Segment

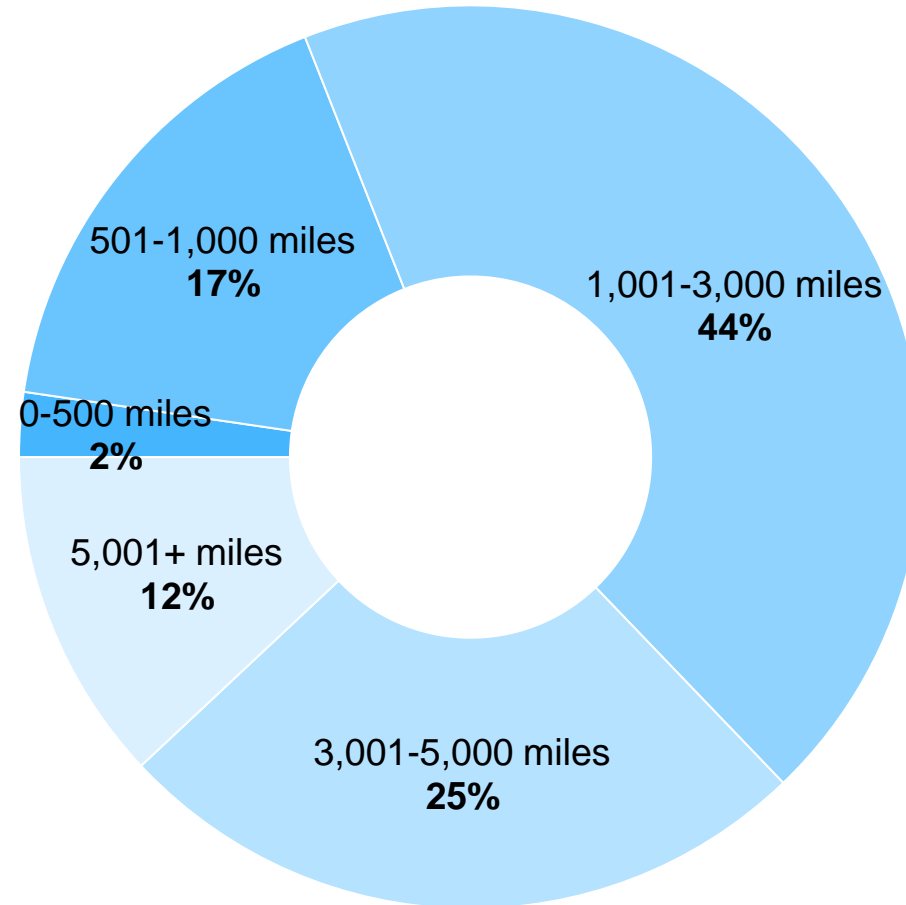
US Avid Traveler \$100K 25-54		US Avid Traveler \$150K 25-54, 2+ household		US Long-Distance Air Traveler Under 55		US Nat Rep	
	%		%		%		%
Texas	40.2%	Texas	15.3%	Texas	29.3%	Texas	15.3%
New York	28.7%	New York	9.7%	New York	23.6%	New York	9.7%
California	10.7%	California	8.1%	California	11.6%	California	8.1%
Illinois	5.6%	Florida	7.5%	Illinois	5.1%	Florida	7.5%
Washington	1.9%	Pennsylvania	3.6%	Georgia	3.0%	Pennsylvania	3.6%
Florida	1.6%	Illinois	3.1%	Florida	3.0%	Ohio	3.5%
Georgia	1.4%	Virginia	2.9%	Washington	2.1%	Georgia	3.3%
Pennsylvania	0.5%	Washington	1.9%	Pennsylvania	1.3%	Illinois	3.1%
Minnesota	0.3%	New Jersey	1.8%	Virginia	0.7%	Virginia	2.9%
Virginia	0.2%	Colorado	1.5%	Minnesota	0.2%	North Carolina	2.4%
Sample Size:	n=304	Sample Size:	n=211	Sample Size:	n=446	Sample Size:	n=1,883

U.S. - Total Annual Holiday Spend



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

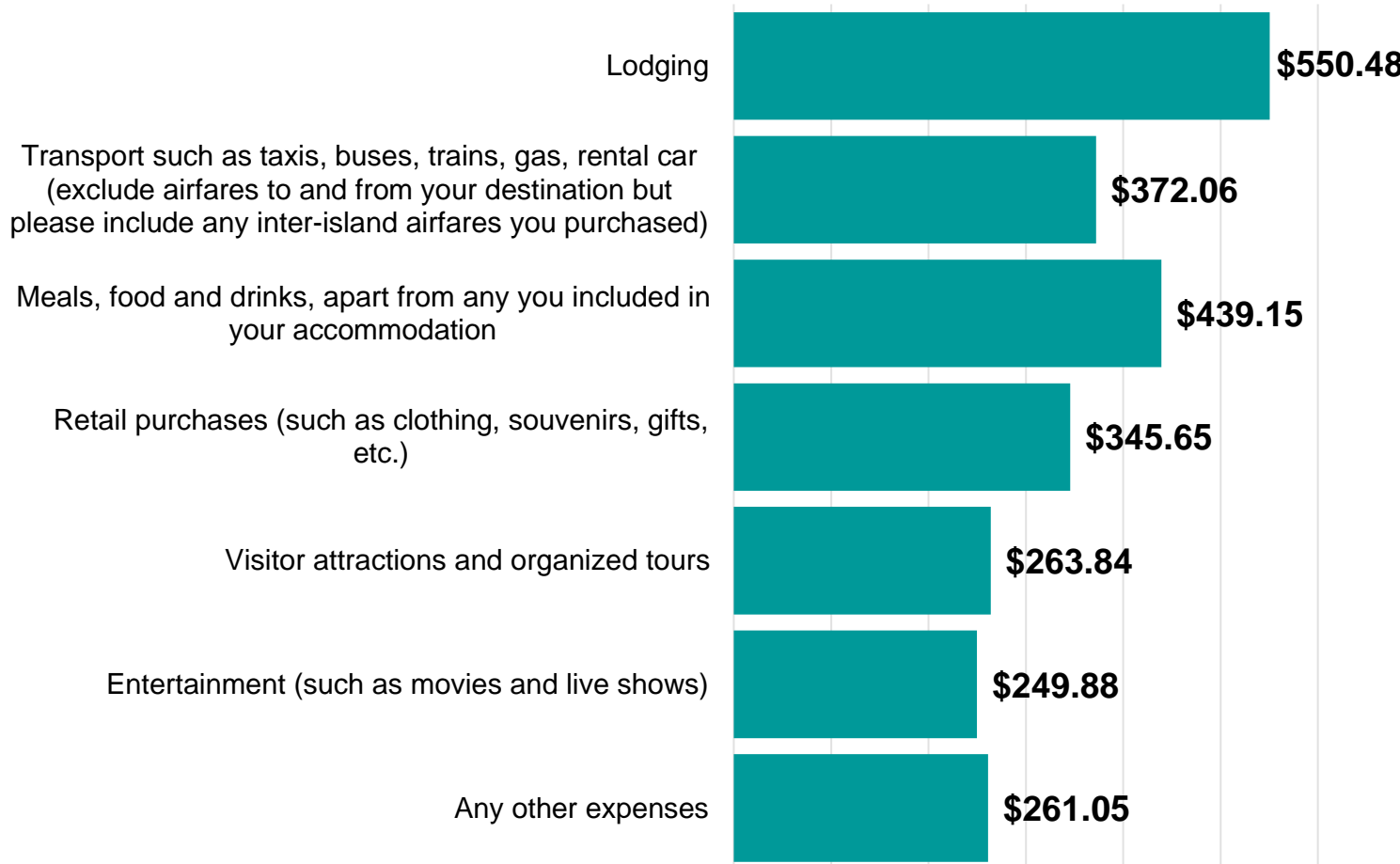
Distance Travelled on Annual Vacation



Sample Size: n=304

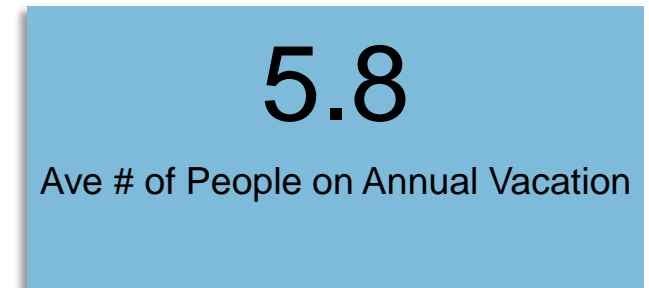
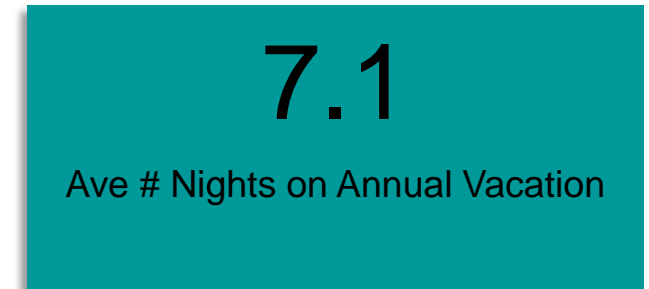
U.S. Avid Travelers \$100k+: Annual Vacation

Average Spend



Sample Size: n=304

Spend Per Person Per Day

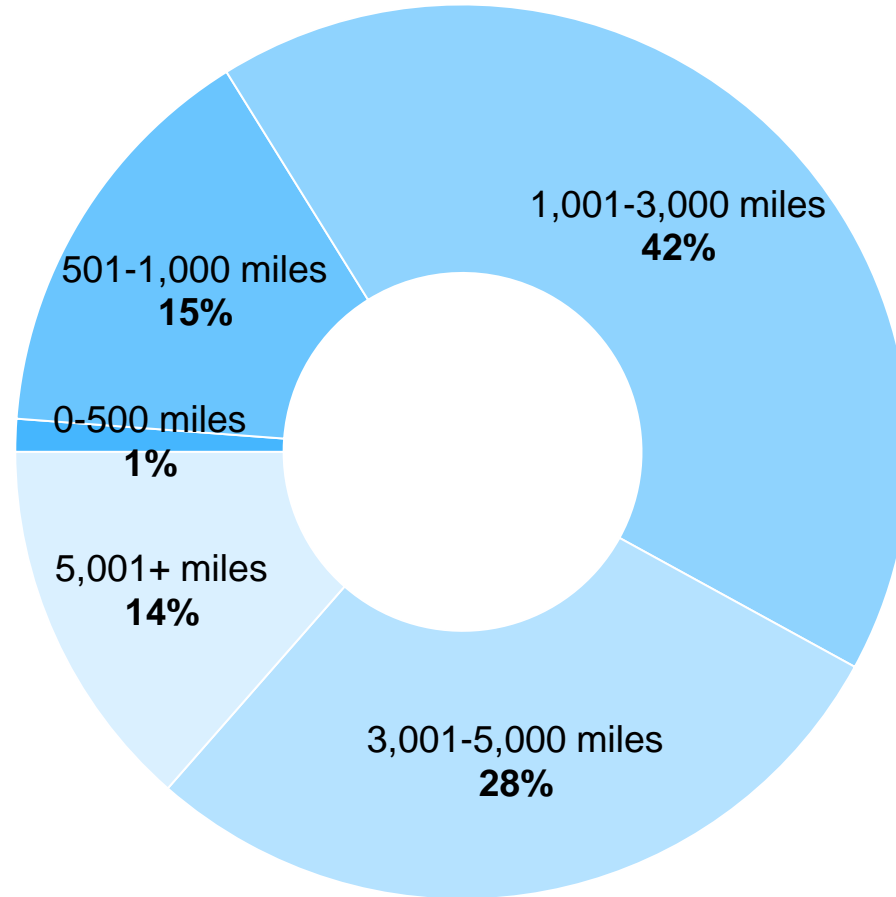


\$60.57

Ave. Per Person Per Day Spend

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

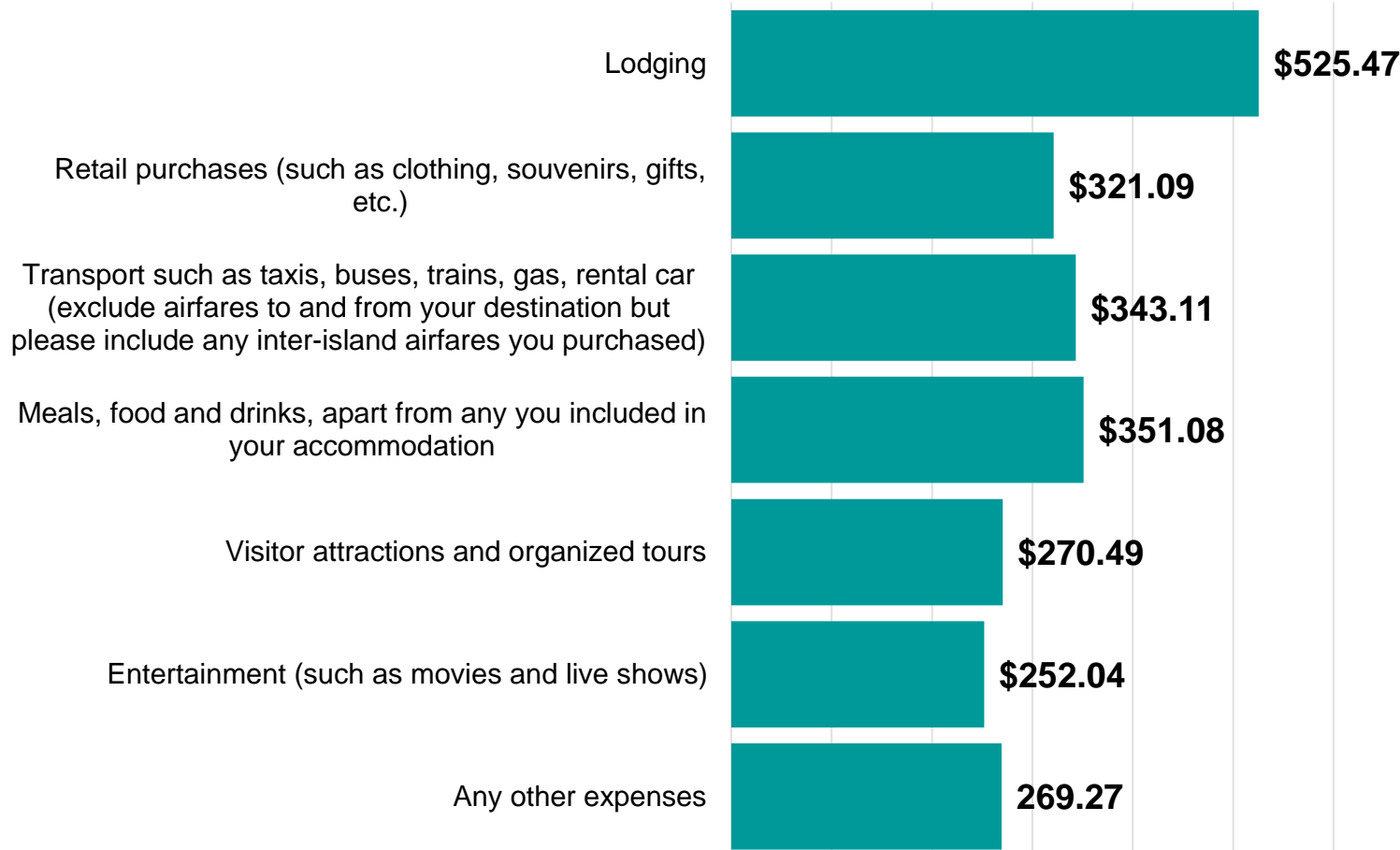
Distance Travelled on Annual Vacation



Sample Size: n=211

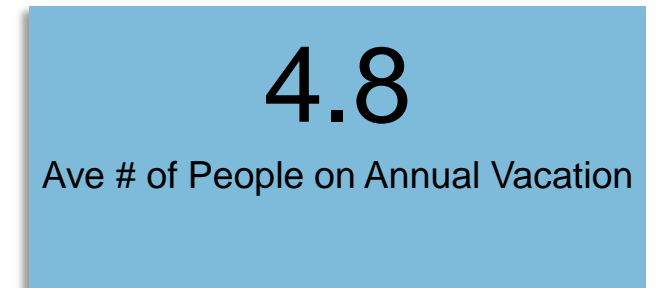
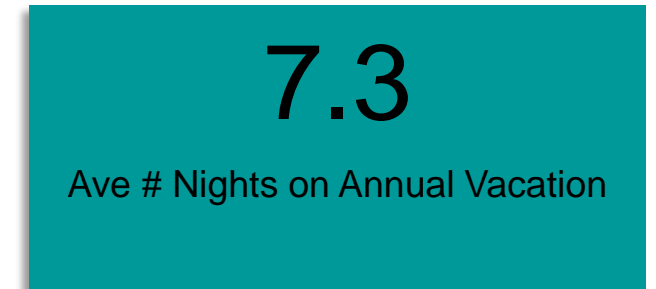
U.S. Avid Travelers \$150k+: Annual Vacation

Average Spend



Sample Size: n=211

Spend Per Person Per Day

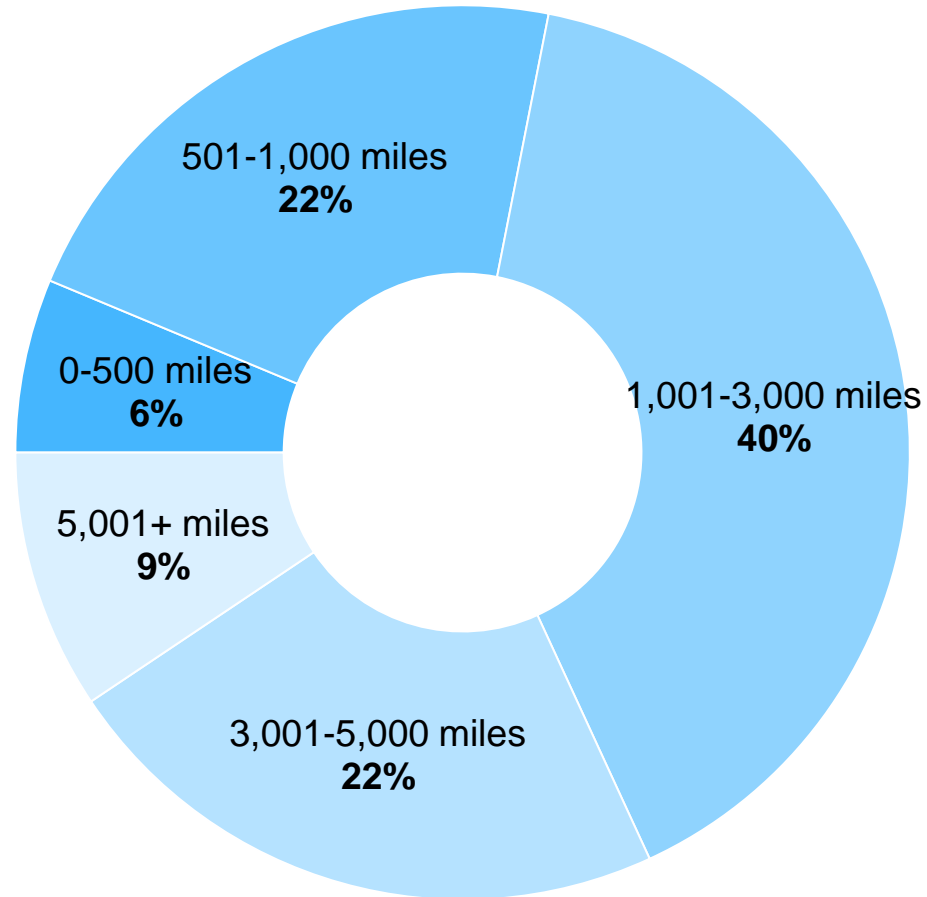


\$44.60

Ave. Per Person Per Day Spend

U.S. Long-Distance Travelers: Annual Vacation

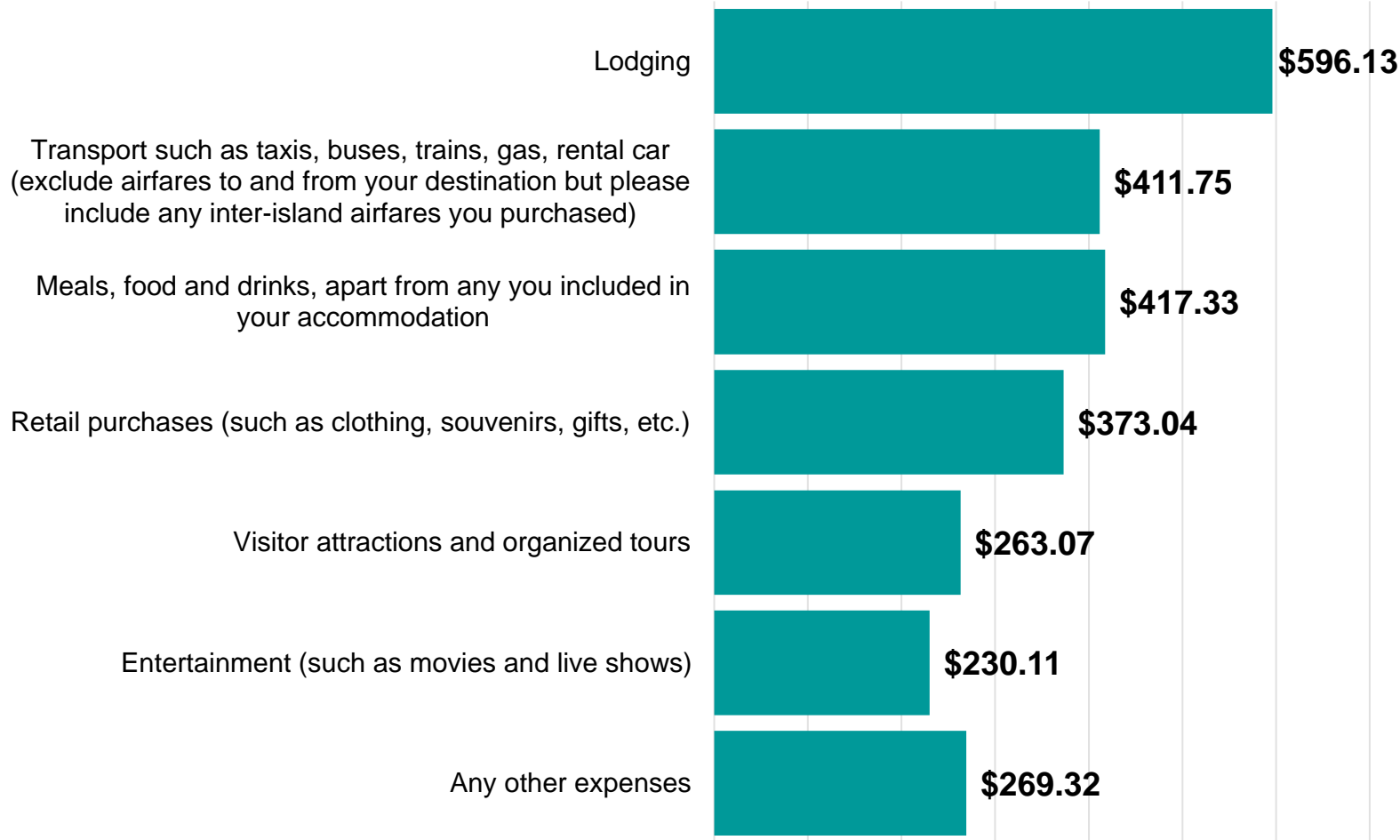
Distance Travelled on Annual Vacation



Sample Size: n=446

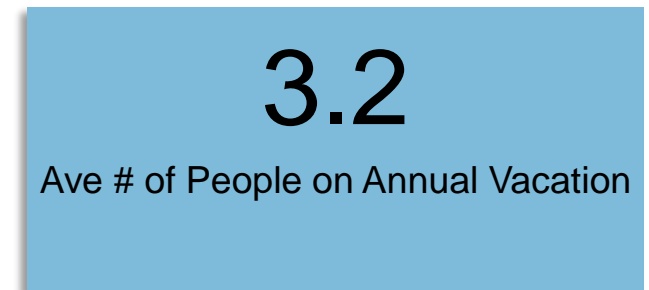
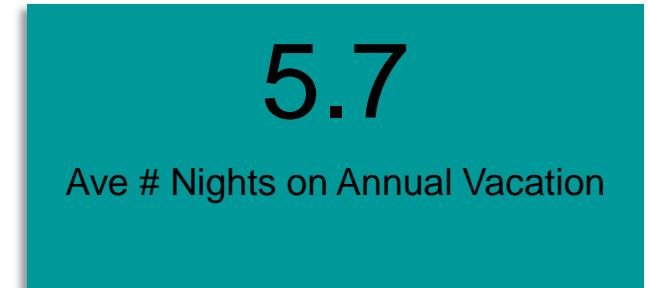
U.S. Long-Distance Travelers: Annual Vacation

Average Spend



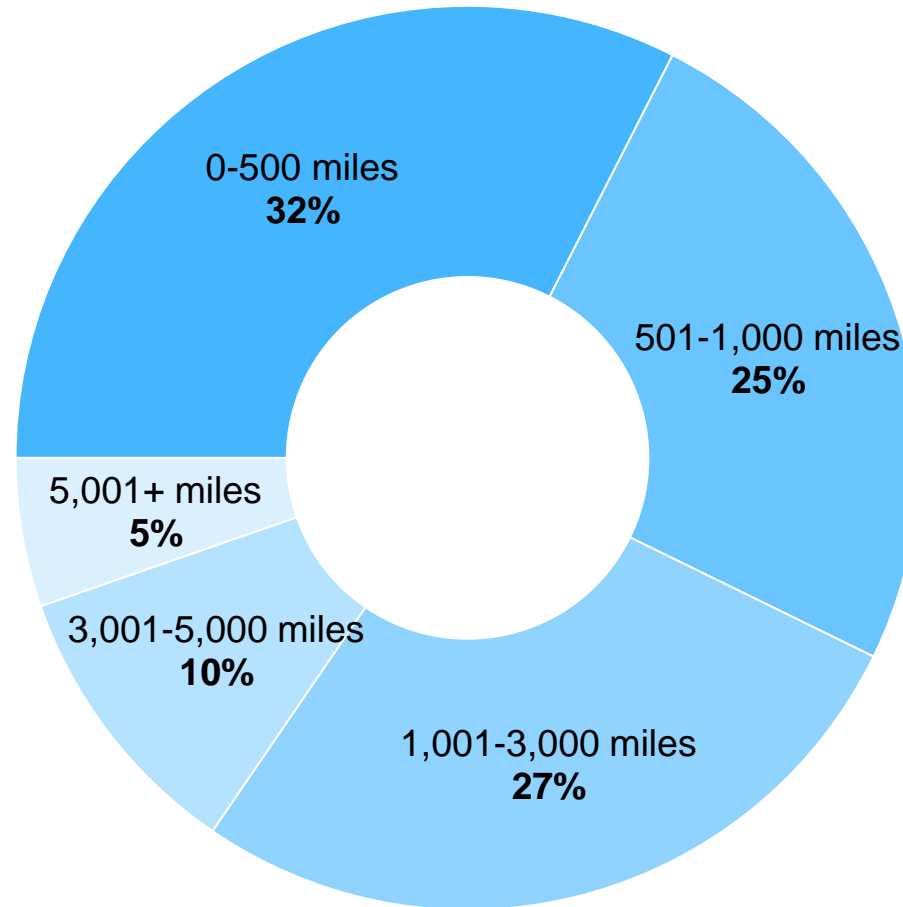
Sample Size: n=446

Spend Per Person Per Day



U.S. Nat Rep: Annual Vacation

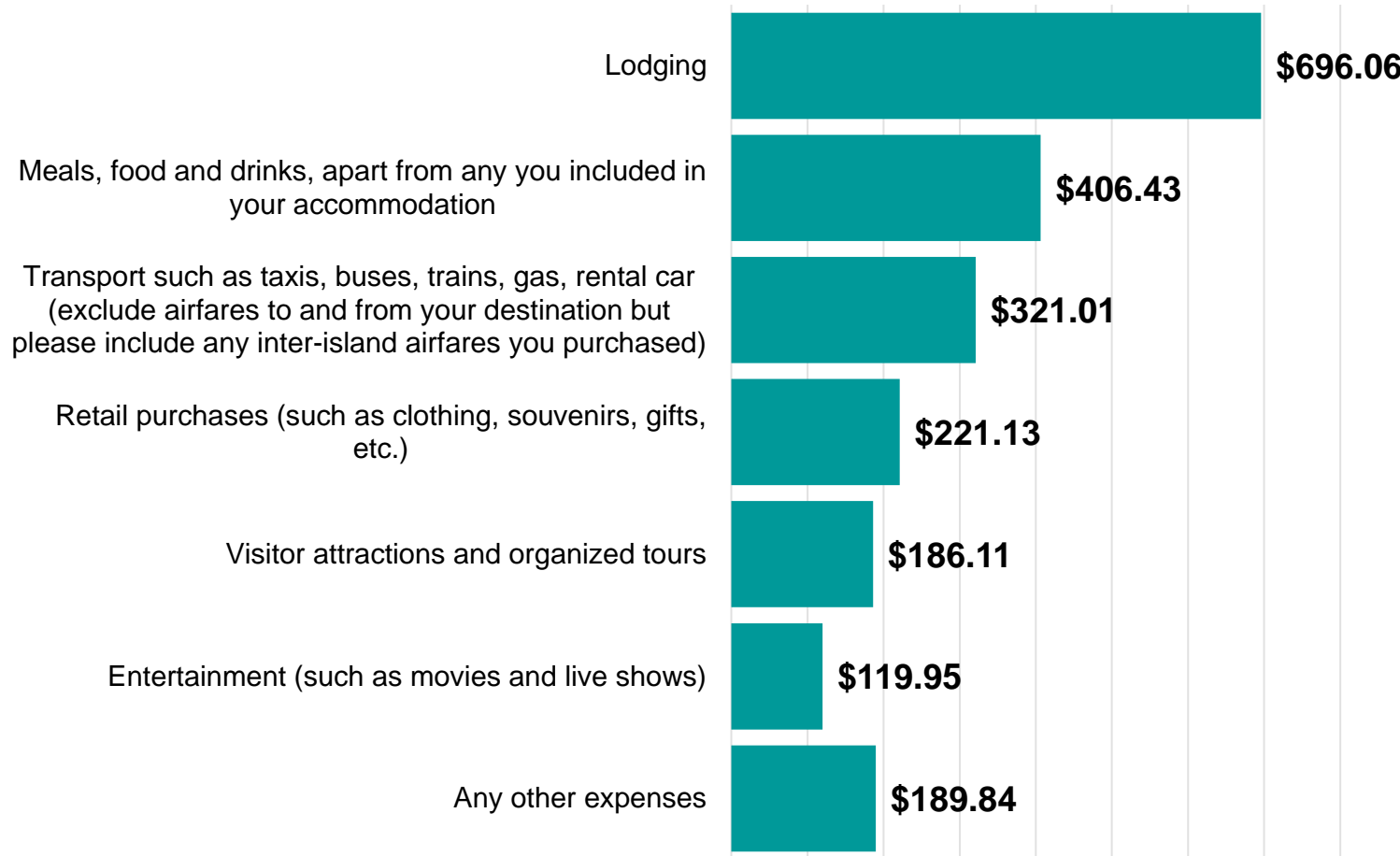
Distance Travelled on Annual Vacation



Sample Size: n=1,883

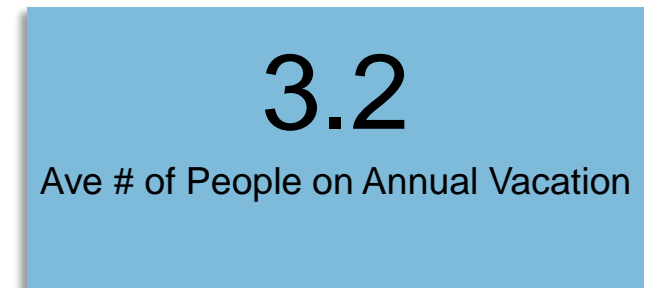
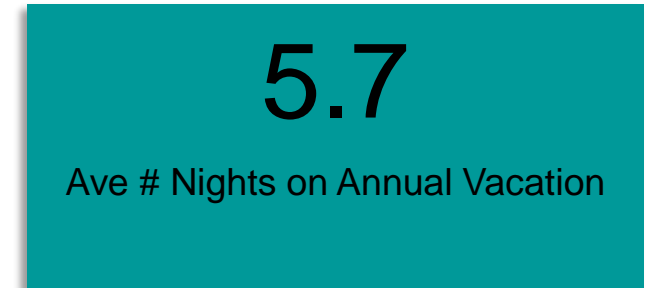
U.S. Nat Rep: Annual Vacation

Average Spend



Sample Size: n=1,883

Spend Per Person Per Day

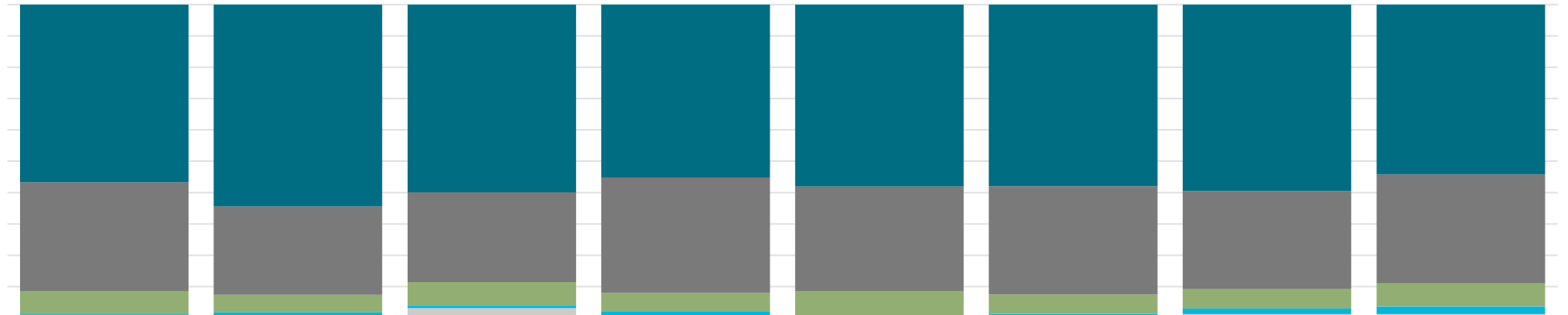


U.S. - Importance of Travel Factors

	Very Important 5			
	US: Avid Traveler \$100k+	US: Avid Traveler \$150k+	US: Long-Distance Air Traveler under 55	US Market
Value for money	57%	57%	57%	59%
Comfort and accessibility	64%	65%	62%	54%
Natural attractions/activities	60%	61%	58%	47%
Family friendly locations and activities	55%	57%	54%	41%
Opportunity to experience local restaurants/businesses	58%	60%	57%	43%
Cultural attractions	58%	59%	56%	40%
Entertainment and nightlife	60%	62%	54%	28%
Consideration of sustainable principles	54%	58%	50%	27%

Sample Size: n=304 n=211 n=446 n=1,883

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
■ Very Important 5	57%	64%	60%	55%	58%	58%	60%	54%
■ 4	35%	28%	29%	37%	33%	34%	31%	35%
■ 3	7%	6%	8%	6%	8%	6%	6%	7%
■ 2	1%	1%	1%	2%	1%	1%	2%	2%
■ Not very Important 1	0%	1%	3%	0%	0%	0%	1%	1%

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

Sample Size: n=304

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

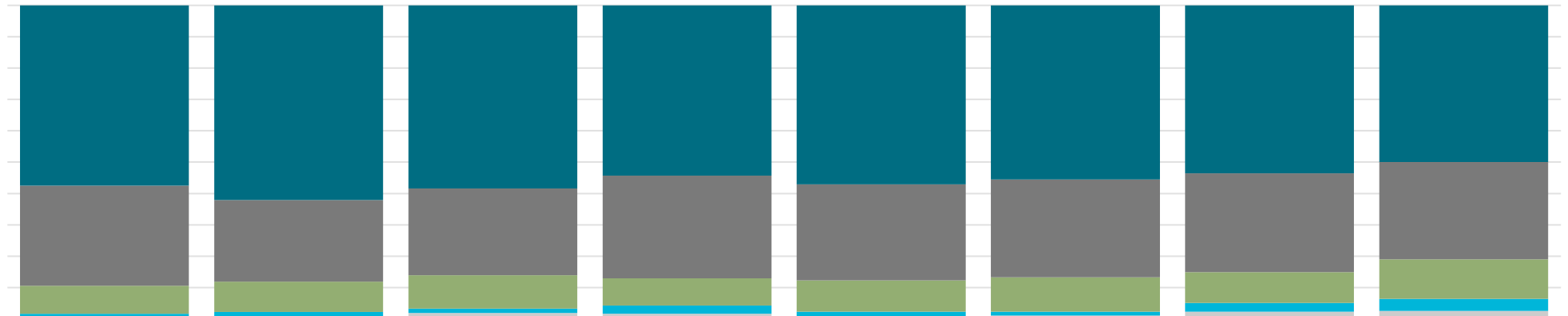


	Value for money	Comfort and accessibility	Natural attractions/ activities	Family friendly locations and activities	Opportunity to experience local restaurants/ businesses	Cultural attractions	Entertainment and nightlife	Consideration of sustainable principles
■ Very Important 5	57%	65%	61%	57%	60%	59%	62%	58%
■ 4	35%	29%	29%	38%	35%	35%	32%	34%
■ 3	7%	4%	9%	4%	4%	4%	5%	7%
■ 2	1%	2%	0%	0%	0%	1%	0%	0%
■ Not very Important 1	0%	0%	1%	0%	0%	0%	1%	1%

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

Sample Size: n=211

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

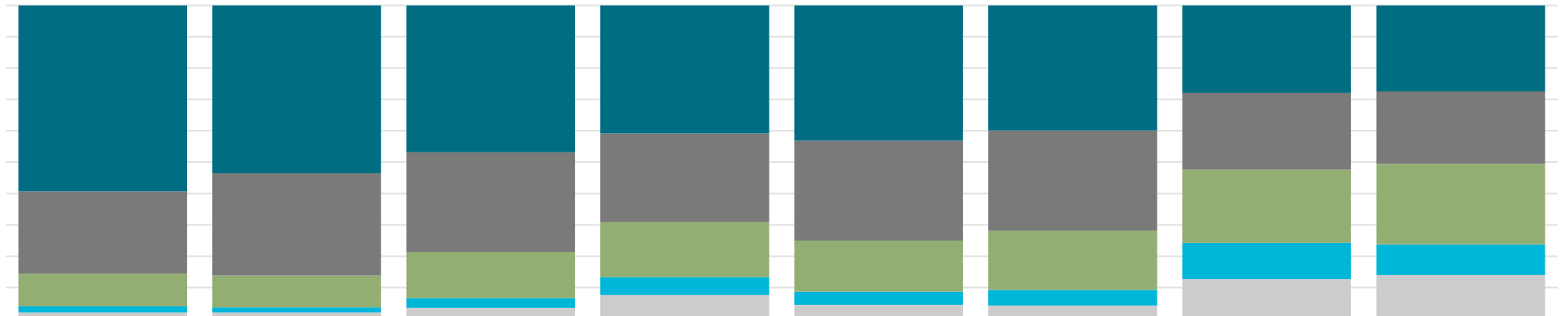


	Value for money	Comfort and accessibility	Natural attractions/ activities	Family friendly locations and activities	Opportunity to experience local restaurants/ businesses	Cultural attractions	Entertainment and nightlife	Consideration of sustainable principles
■ Very Important 5	57%	62%	58%	54%	57%	56%	54%	50%
■ 4	32%	26%	28%	33%	31%	31%	31%	31%
■ 3	9%	10%	11%	9%	10%	11%	10%	13%
■ 2	2%	2%	1%	3%	2%	1%	3%	4%
■ Not very Important 1	0%	0%	2%	2%	0%	1%	2%	3%

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

Sample Size: n=446

U.S. Nat Rep: Importance of Travel Factors



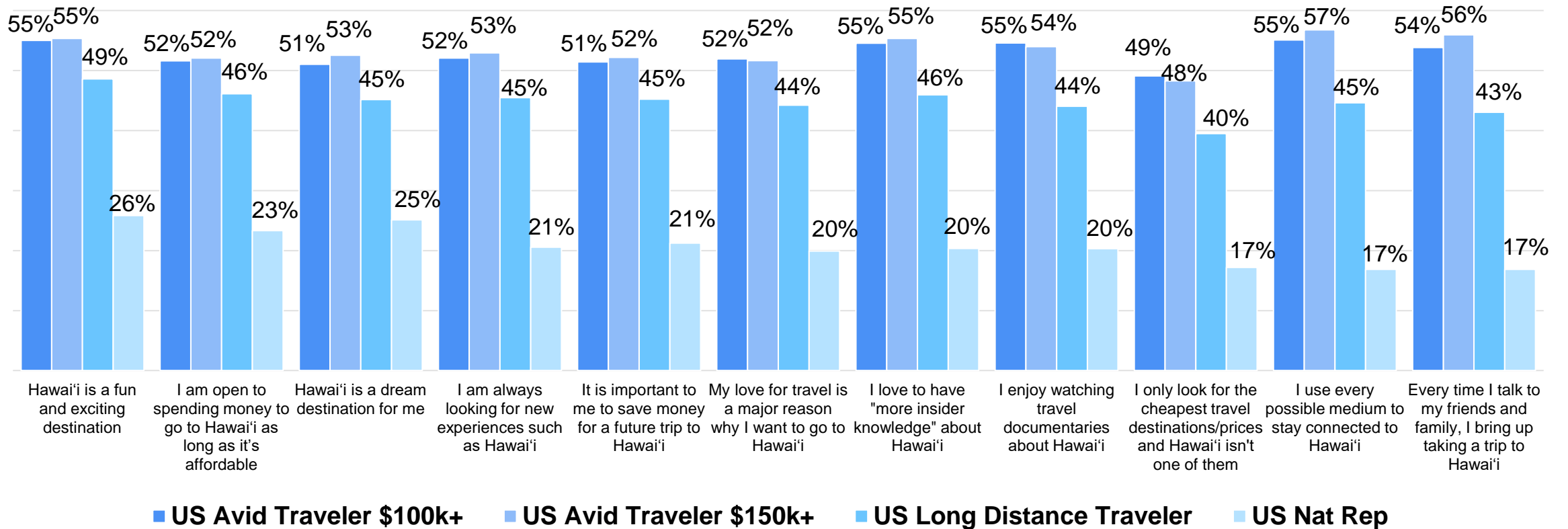
	Value for money	Comfort and accessibility	Natural attractions/activities	Family friendly locations and activities	Opportunity to experience local restaurants/businesses	Cultural attractions	Entertainment and nightlife	Consideration of sustainable principles
■ Very Important 5	59%	54%	47%	41%	43%	40%	28%	27%
■ 4	26%	33%	32%	28%	32%	32%	25%	23%
■ 3	10%	10%	15%	17%	16%	19%	23%	26%
■ 2	2%	2%	3%	6%	4%	5%	12%	10%
■ Not very Important 1	2%	2%	4%	8%	5%	4%	13%	14%

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

Sample Size: n=1,883

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

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



Sample Size:

n=304

n=211

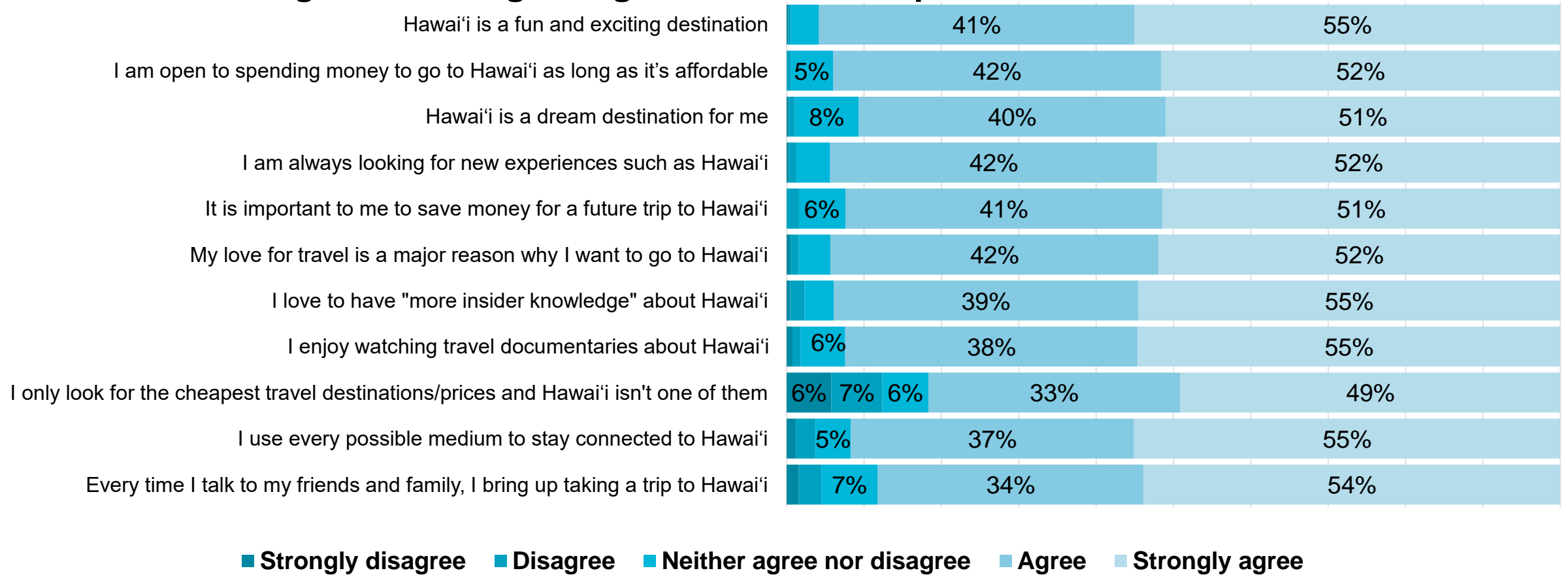
n=446

n=1,883

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

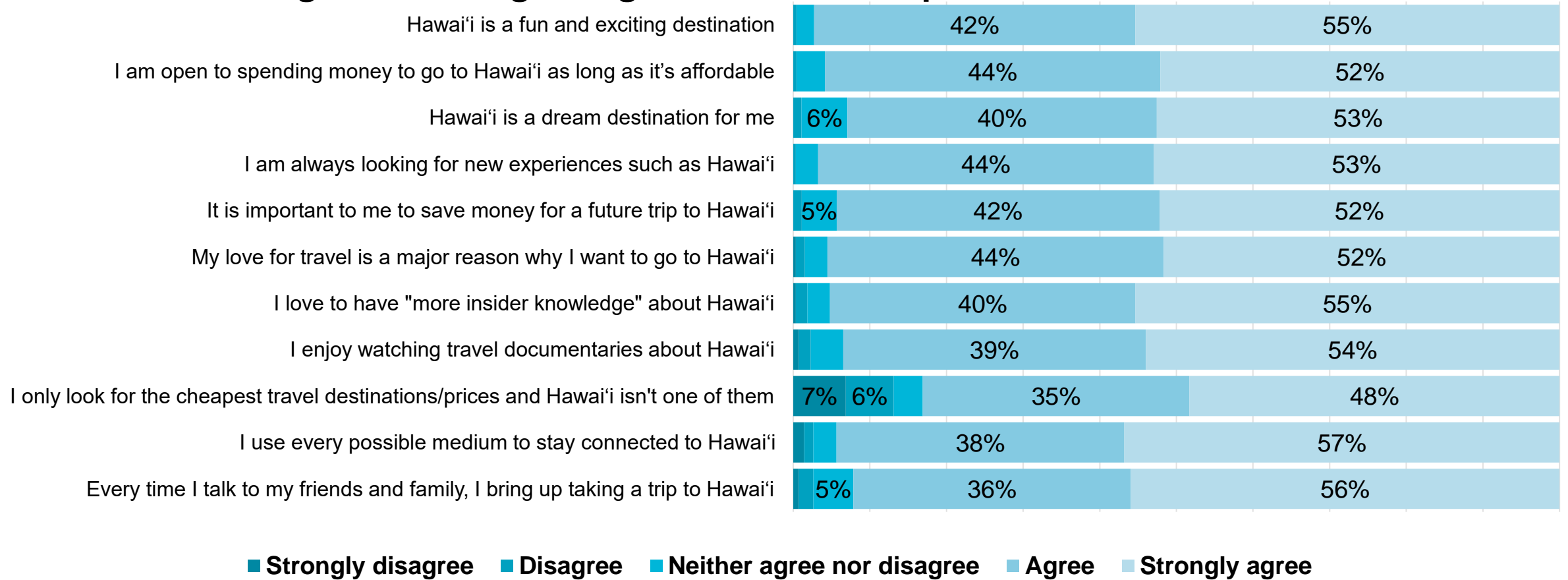
Agreement Regarding Hawai'i as an Aspirational Destination



Sample Size: n=304

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

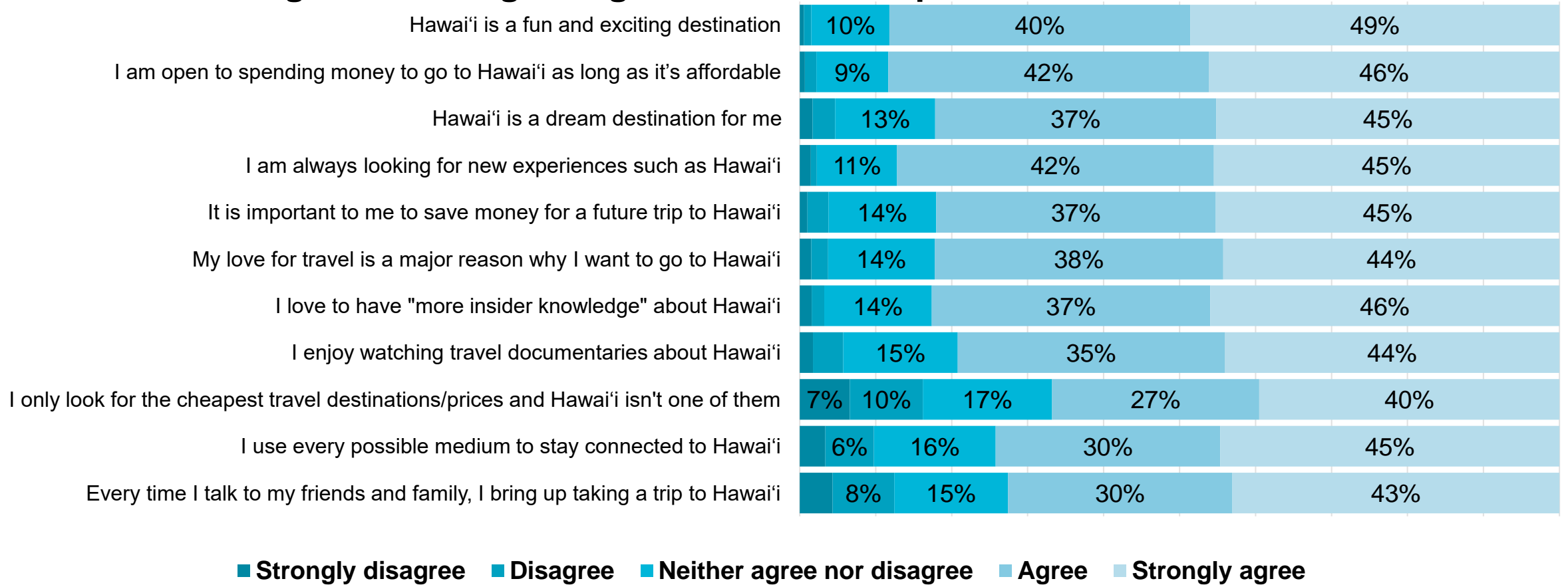
Agreement Regarding Hawai'i as an Aspirational Destination



Sample Size: n=211

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

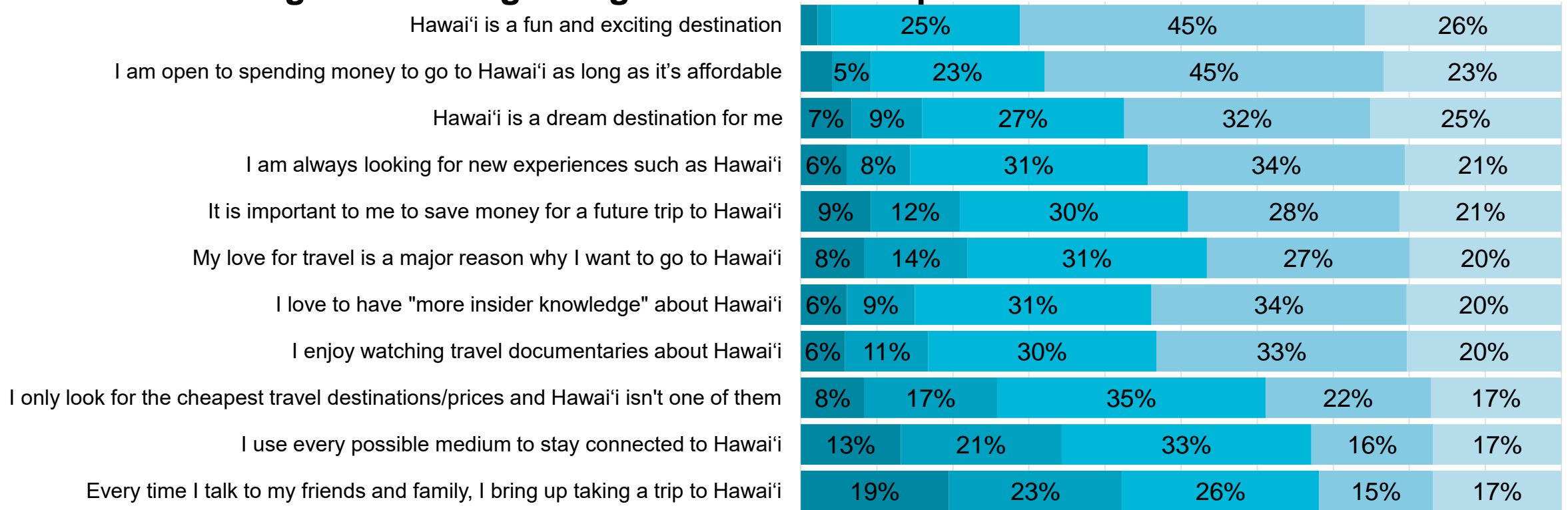
Agreement Regarding Hawai'i as an Aspirational Destination



Sample Size: n=446

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

Agreement Regarding Hawai'i as an Aspirational Destination

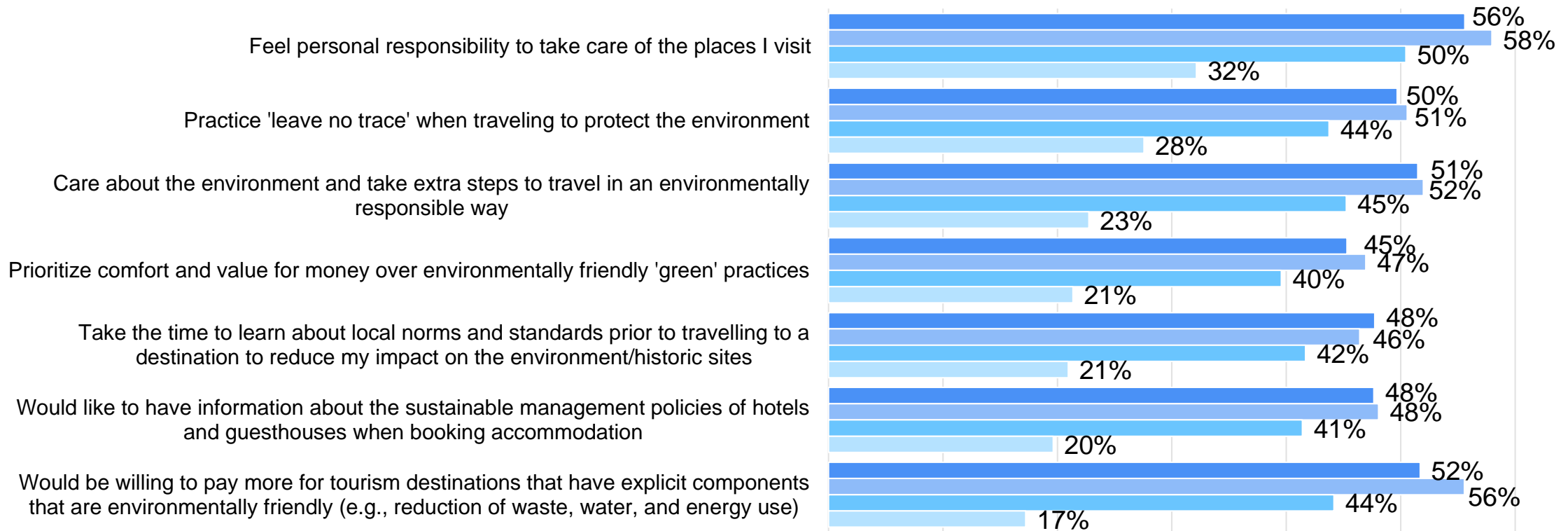


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=1,883

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=304

n=211

n=446

n=1,883

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=304

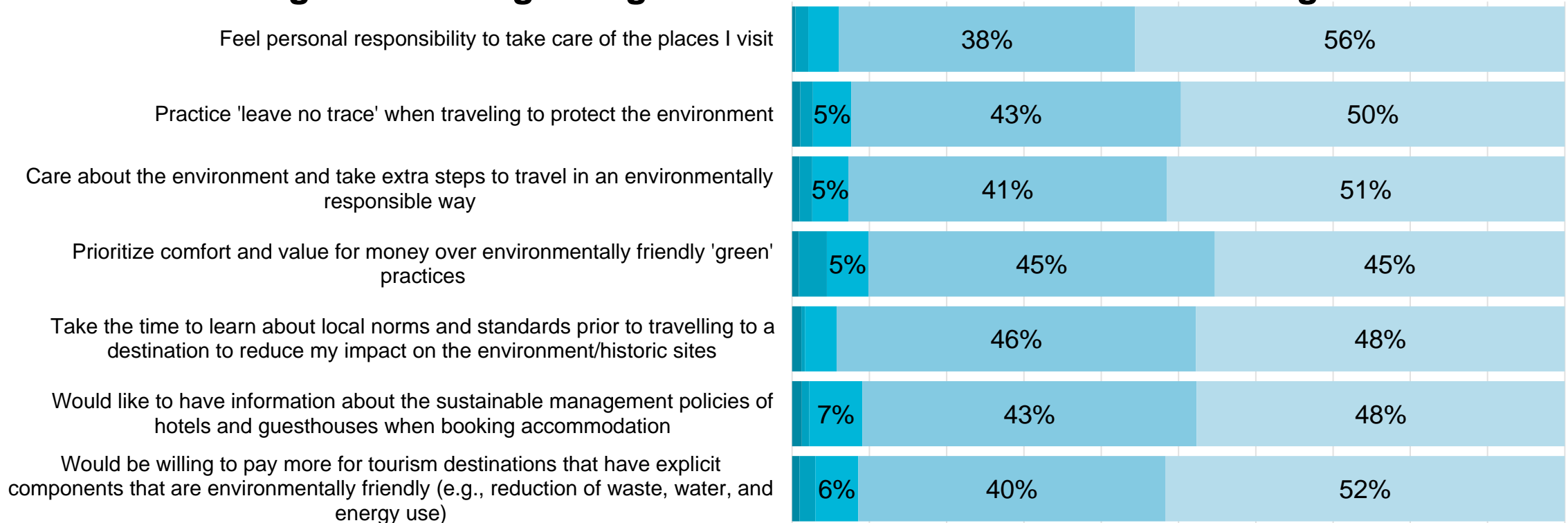
n=211

n=446

n=1,883

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

Agreement Regarding Sustainable Practices While Traveling

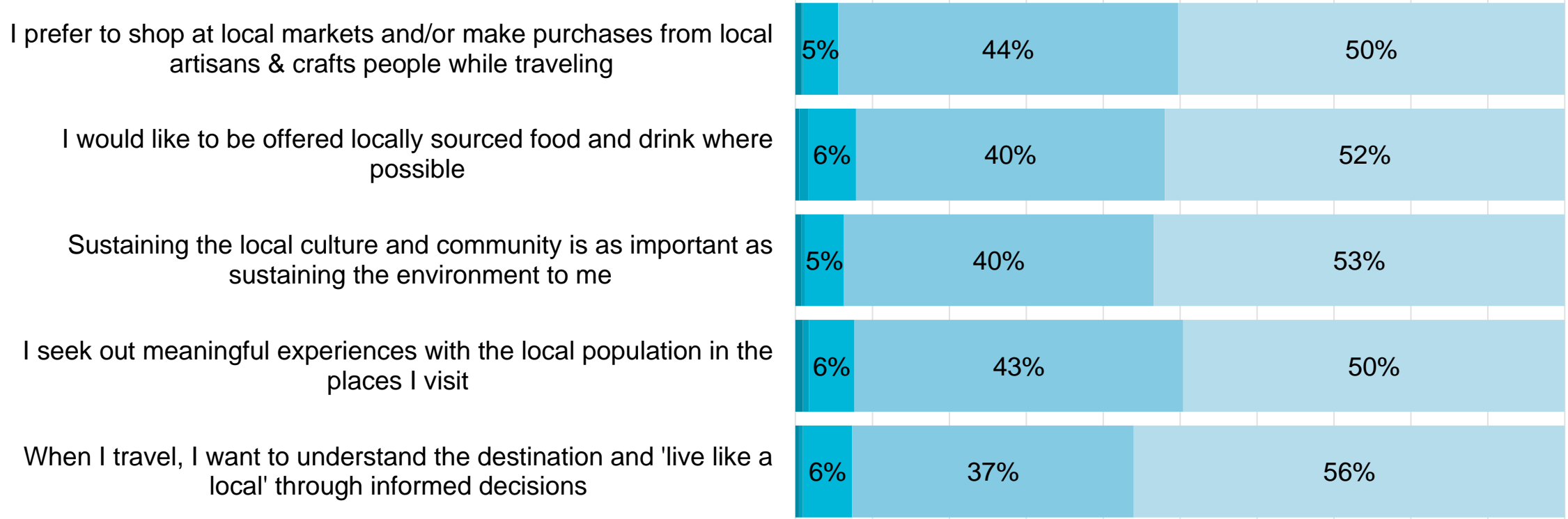


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=304

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

Agreement Regarding Sustaining Local Culture While Traveling

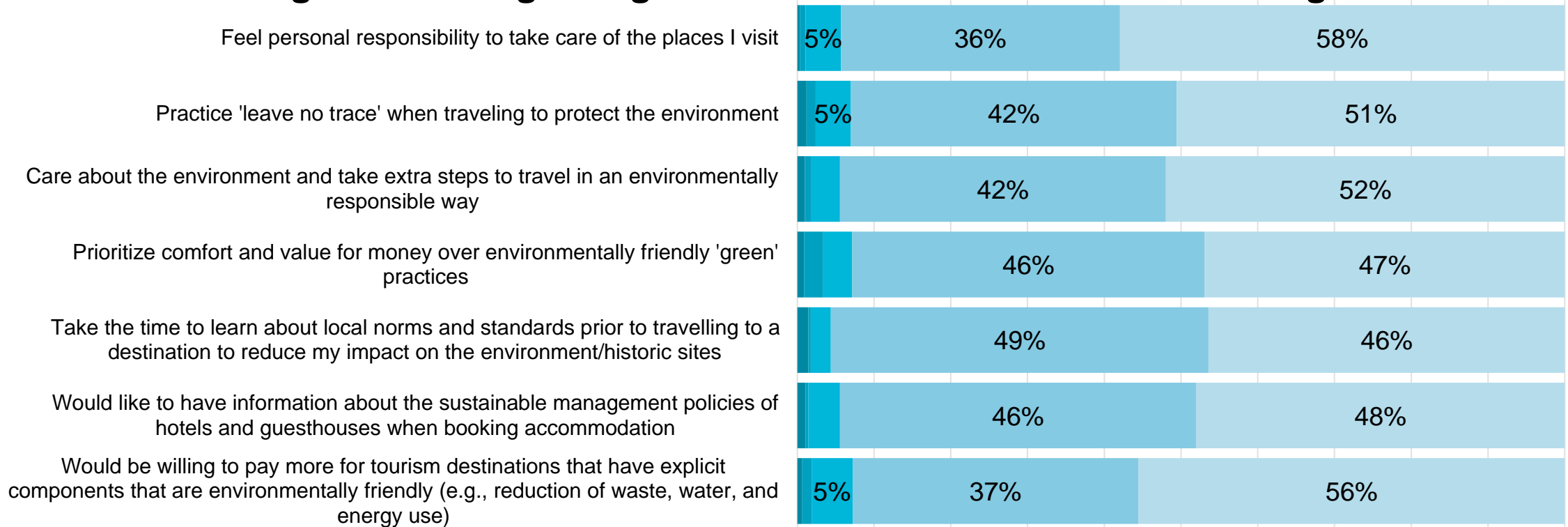


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=304

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

Agreement Regarding Sustainable Practices While Traveling

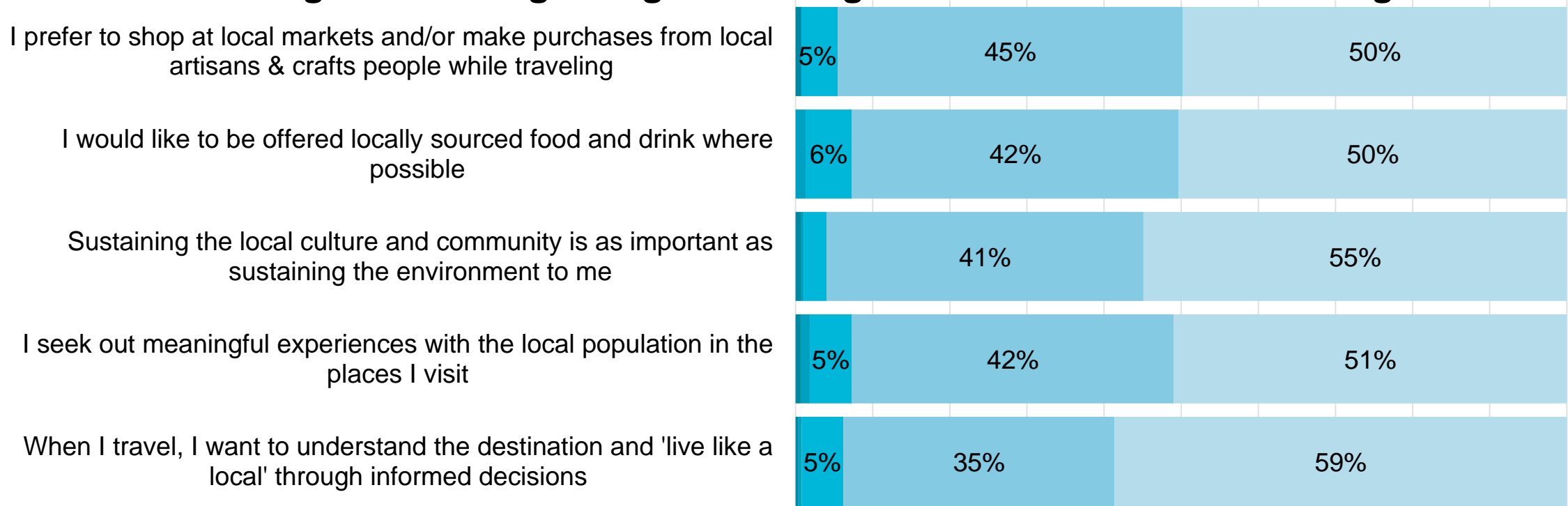


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=211

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

Agreement Regarding Sustaining Local Culture While Traveling

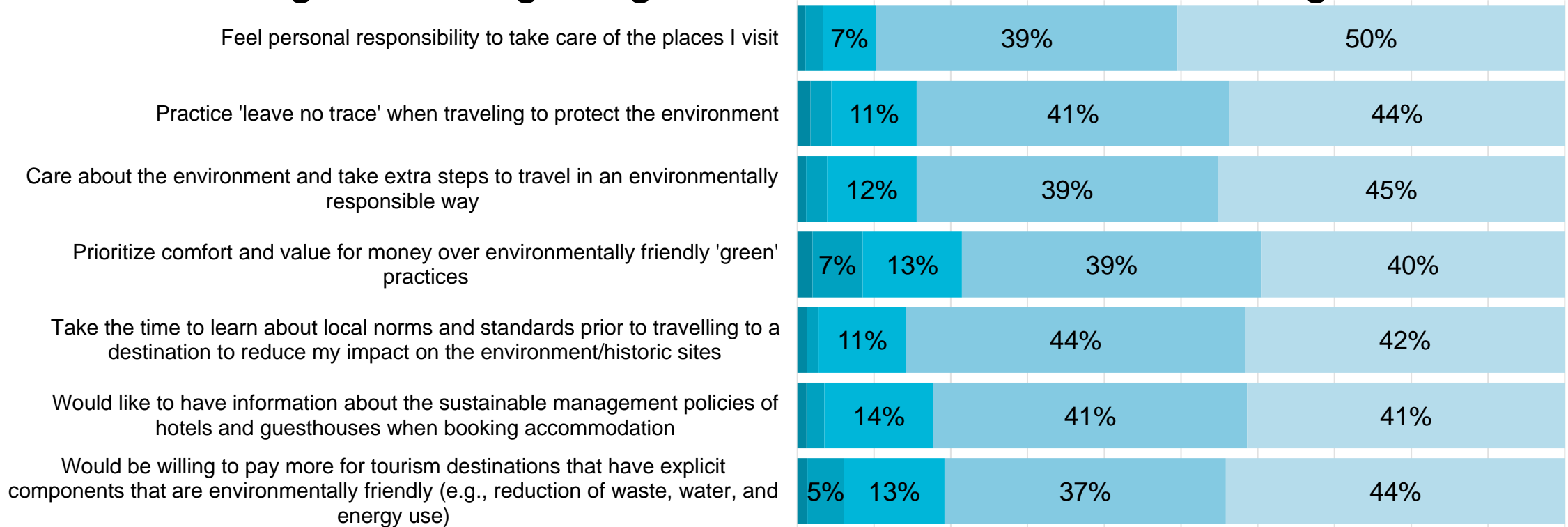


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=211

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

Agreement Regarding Sustainable Practices While Traveling

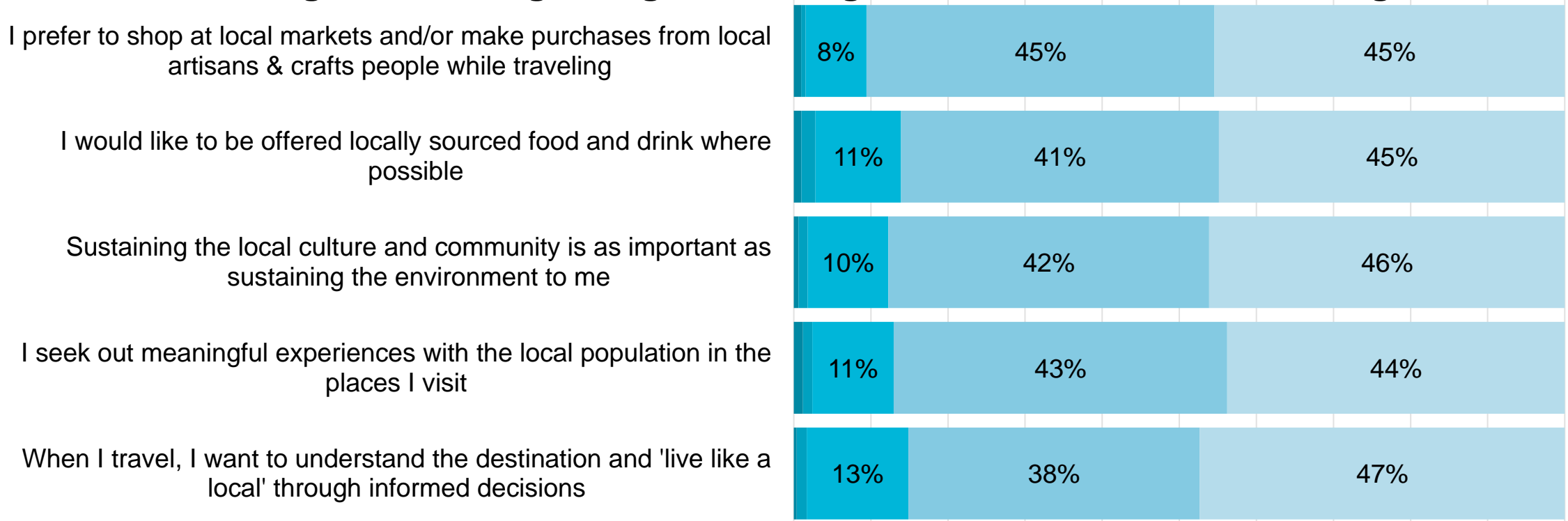


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=446

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

Agreement Regarding Sustaining Local Culture While Traveling

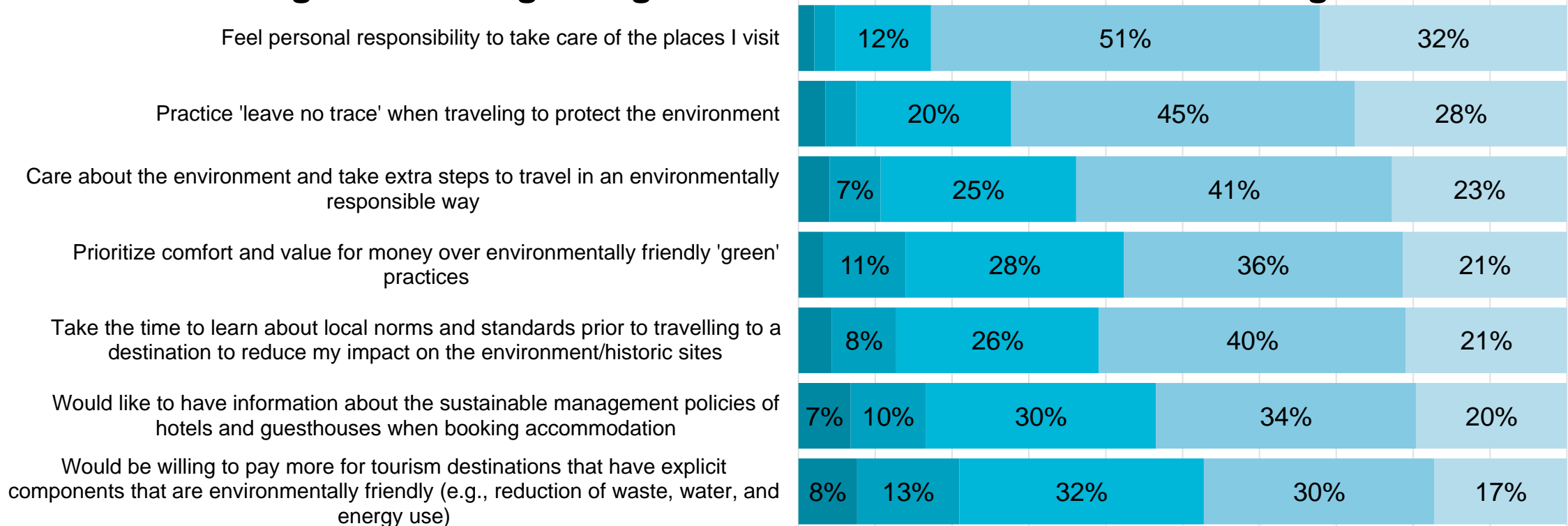


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=446

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

Agreement Regarding Sustainable Practices While Traveling

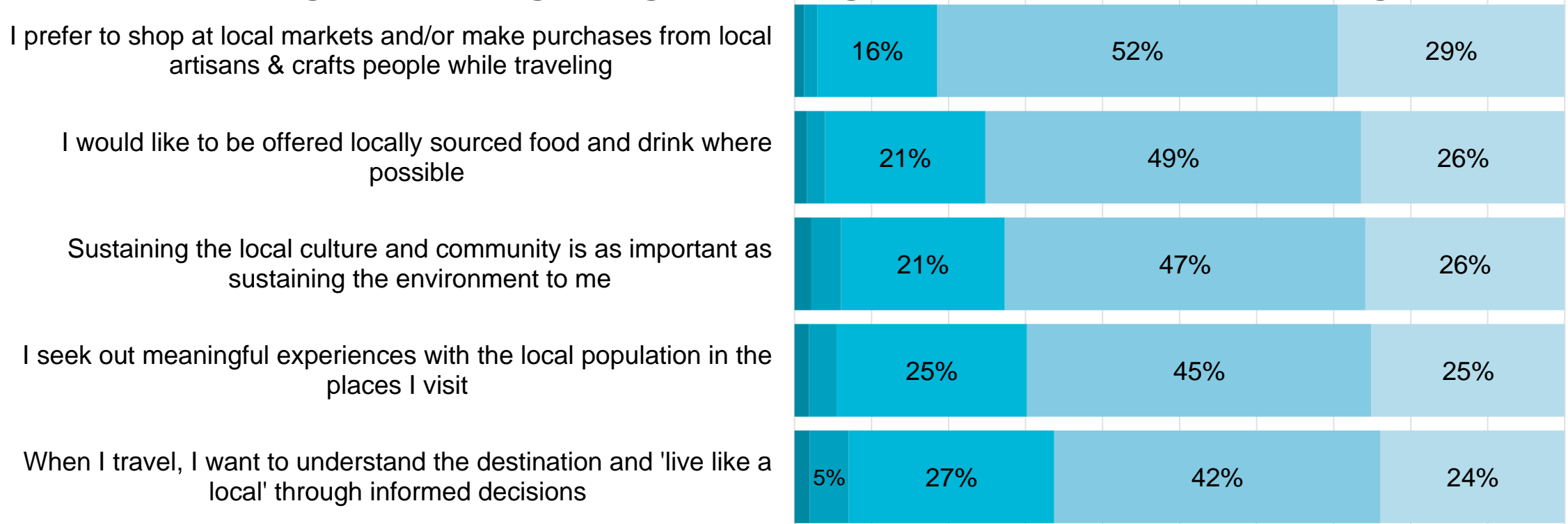


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=1,883

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

Agreement Regarding Sustaining Local Culture While Traveling

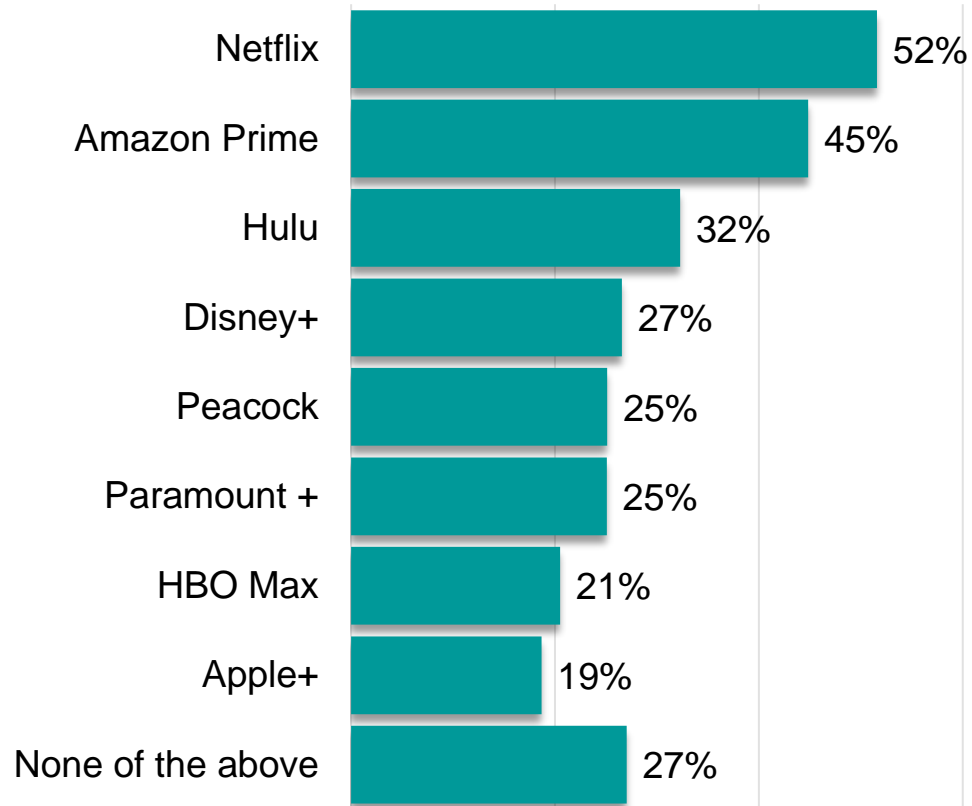


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

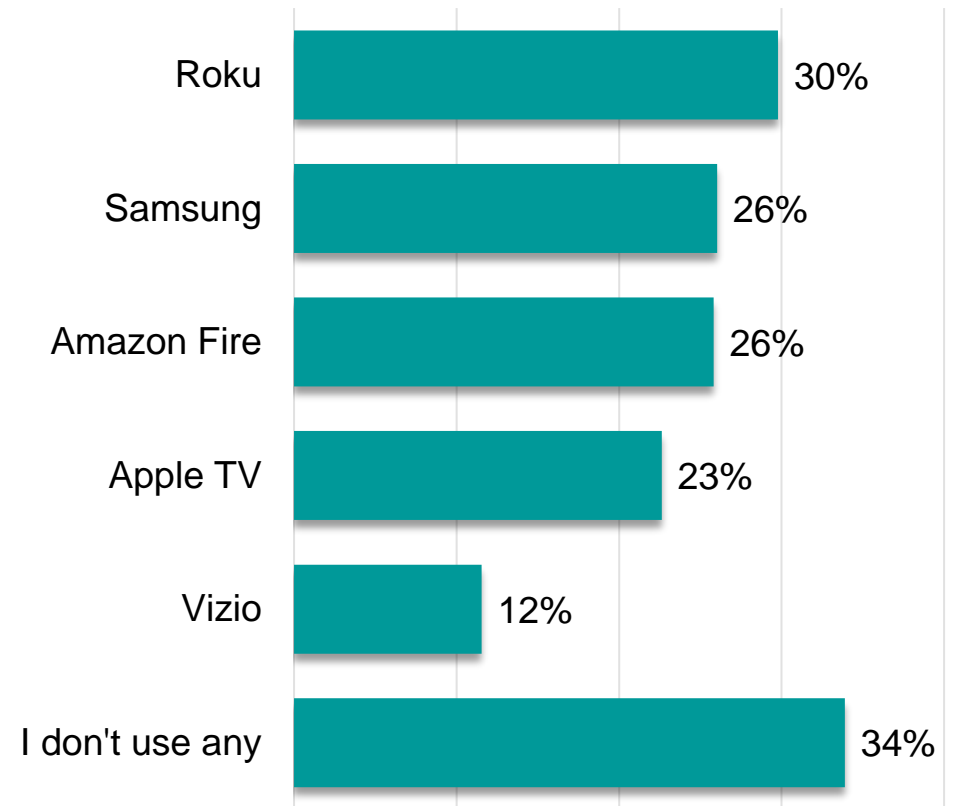
Sample Size: n=1,883

U.S. Media Consumption

Streaming Platforms Used Weekly



Connected Device Used

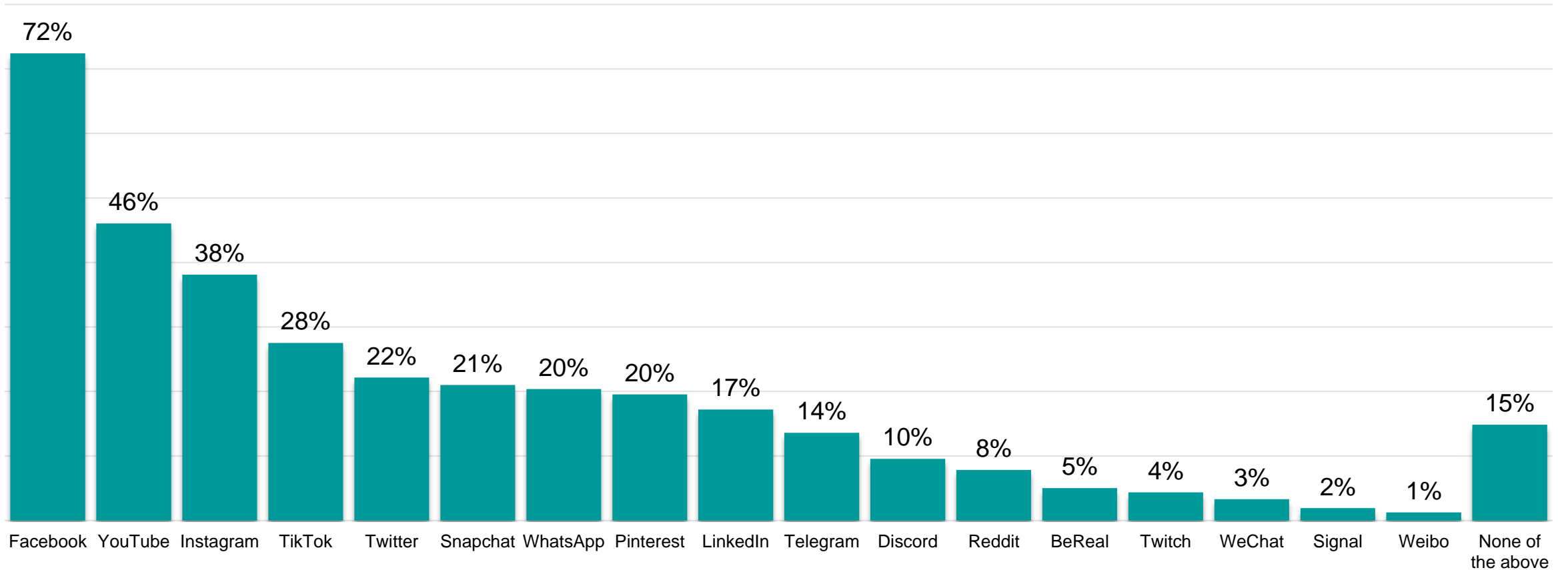


Sample Size: n=1,883

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=1,883

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	48%
Online	39%
TV commercials	37%
Social Media	33%
TV Program/Documentary	28%
YouTube	27%
Email	22%
Newspaper	15%
Radio	13%
Out of home advertising (e.g. Poster Billboards, bus shelter advertisements, etc.)	12%
I don't recall	14%

Actions Taken After Seeing an Ad for a Destination

I search for information about the destination online	48%
I go to the destination's website	38%
I talk to friends/family about the destination	35%
I look up the destination on social media	24%
I book travel to the destination almost immediately	13%
I don't do anything	23%
None of the above	6%

Sample Size: n=1,883