



Vision Insights Australia Traveler Profiles 2024

January 24, 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., Canada, Japan, 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., Canada, Japan, Australia, and Korea
- For the Australia Profiles, the sample size for the Avid Traveler segment is below the minimum sample size requirement so the breakdown of this segment for selected sections (e.g., annual vacation, importance of travel factors, Hawai'i as an aspirational destination, & sustainability and travel responsibility statements) are unavailable

Australia - Segment Definitions

Family Traveler

- Gross household income is \$150k+
- Age is 35-50
- Has children under the age of 18
- Either took an international flight in the last 12 months or whose most recent leisure destination was Hawai'i/USA/or Southeast Asia in the past 12 months

Avid Traveler

- Gross household income is \$100k+
- Age is 45-65
- Been to Hawai'i more than 2x in the past
- Either took an international flight in the last 12 months or likely/very likely to book an air trip in the next 12 months

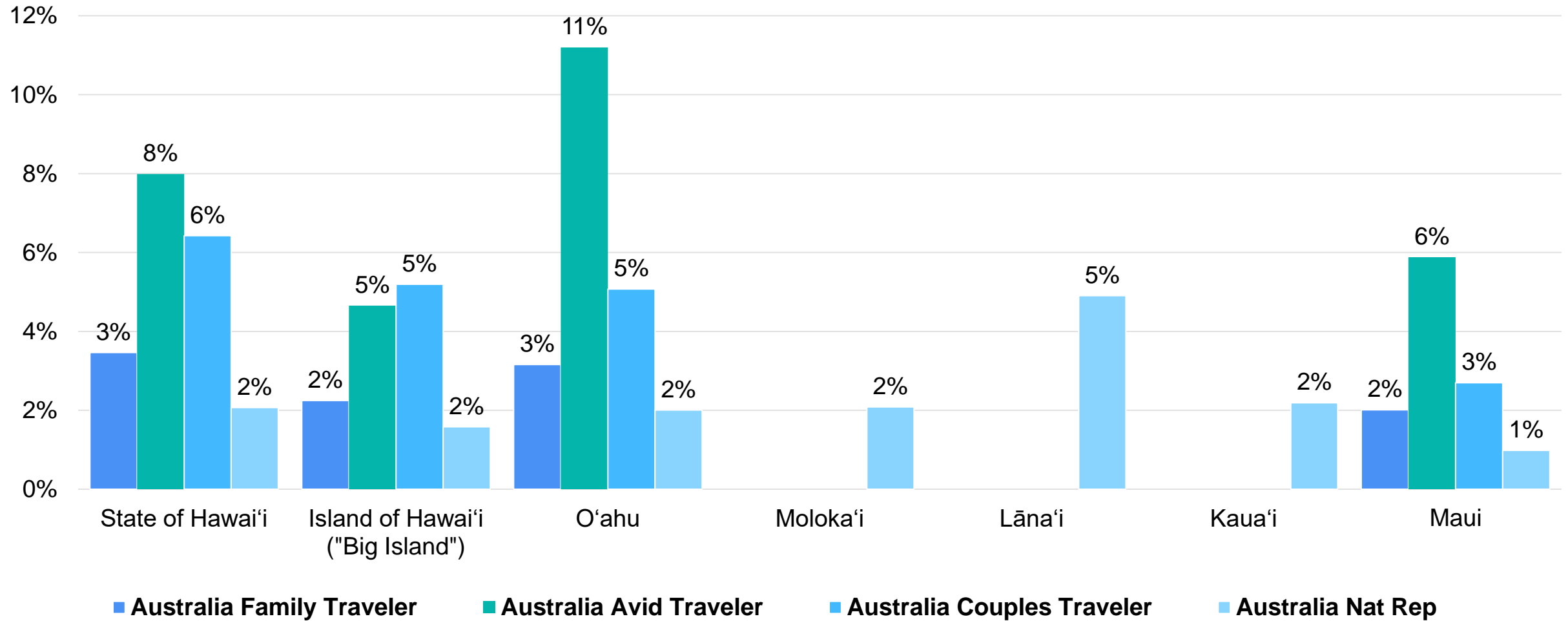
Couples Traveler

- Gross household income is \$100k+
- Married or living with partner
- Age is 30-50
- Not traveling with children under the age of 18
- Either took an international flight in the last 12 months, are likely/very likely to book an air trip in the next 12 months, or whose most recent leisure destination was either Hawai'i/Europe/Bali/Fiji/California/or Thailand in the past two years

Nationally Representative Sample (Nat Rep)

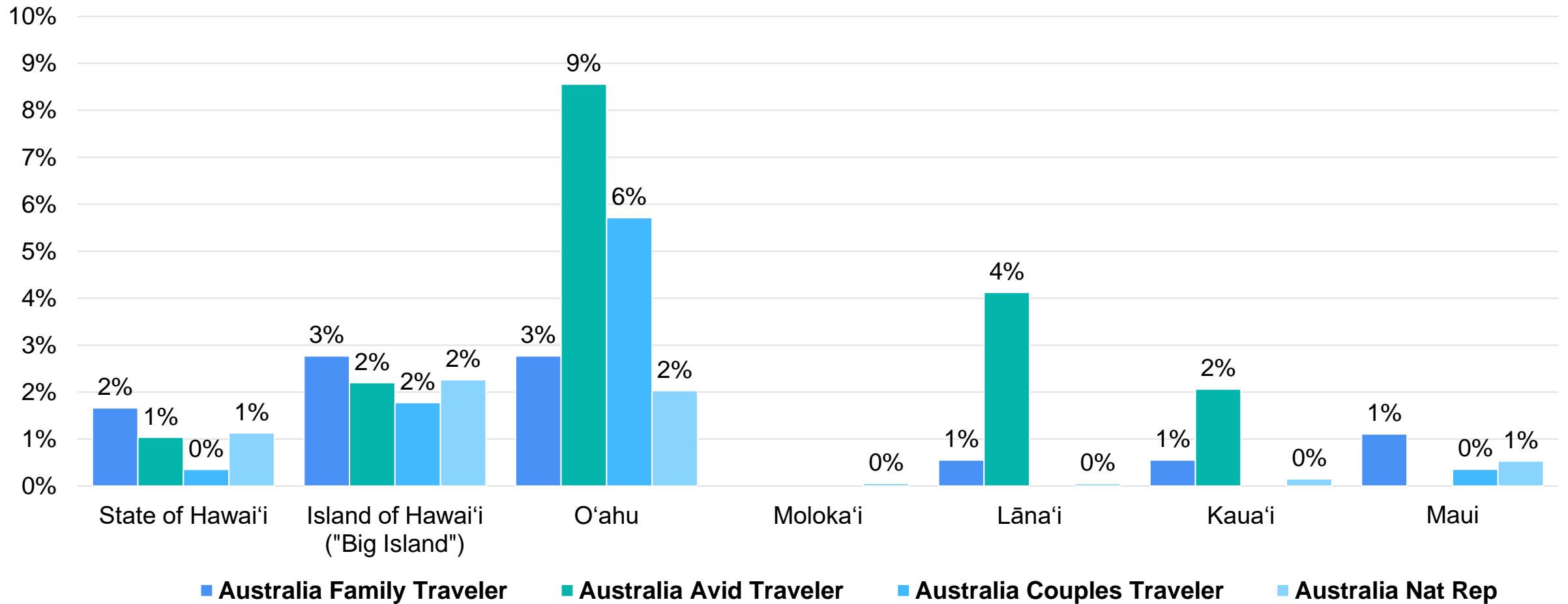
- Representative of Australia adults in terms of age, gender, social class and education

Australia - Leisure Trip in Past 12 Months



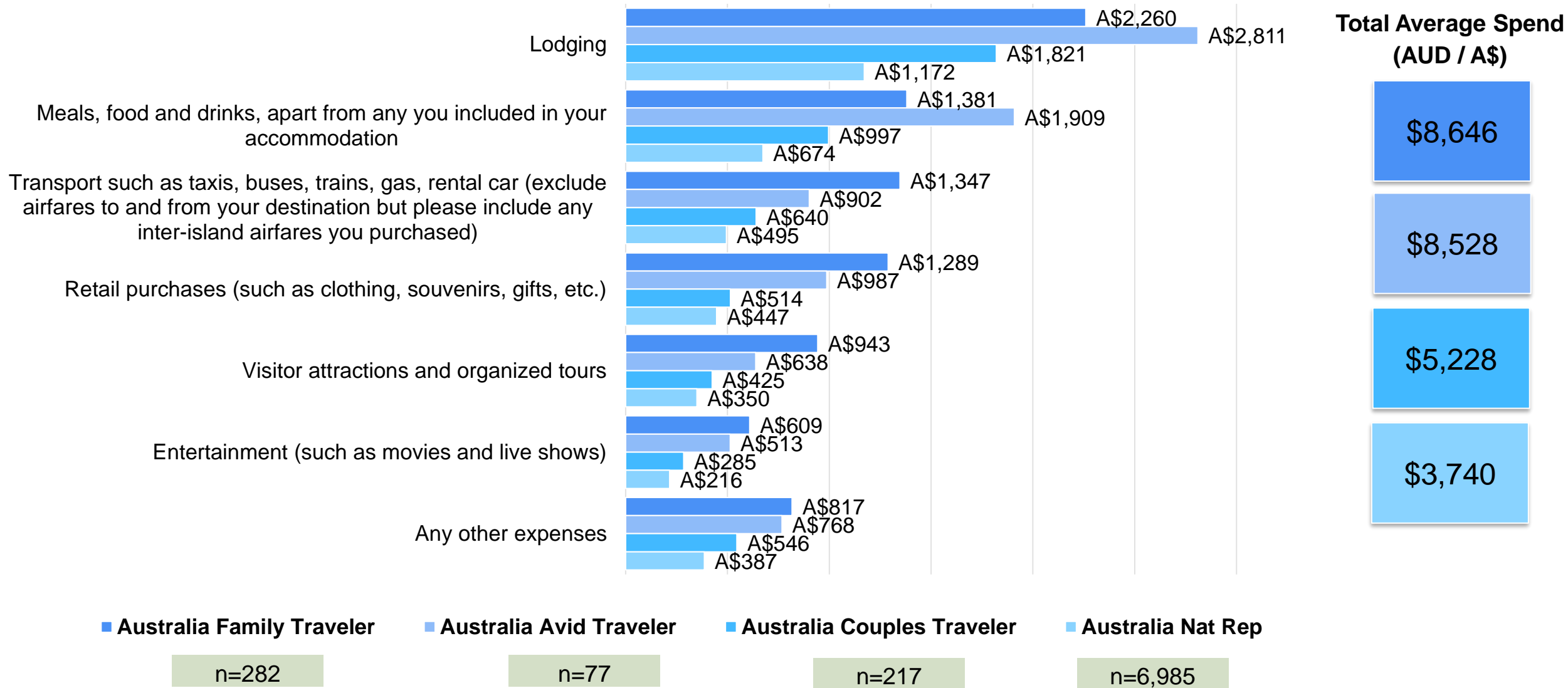
Sample Min. n=50

Australia - Next Destination for Leisure Trip



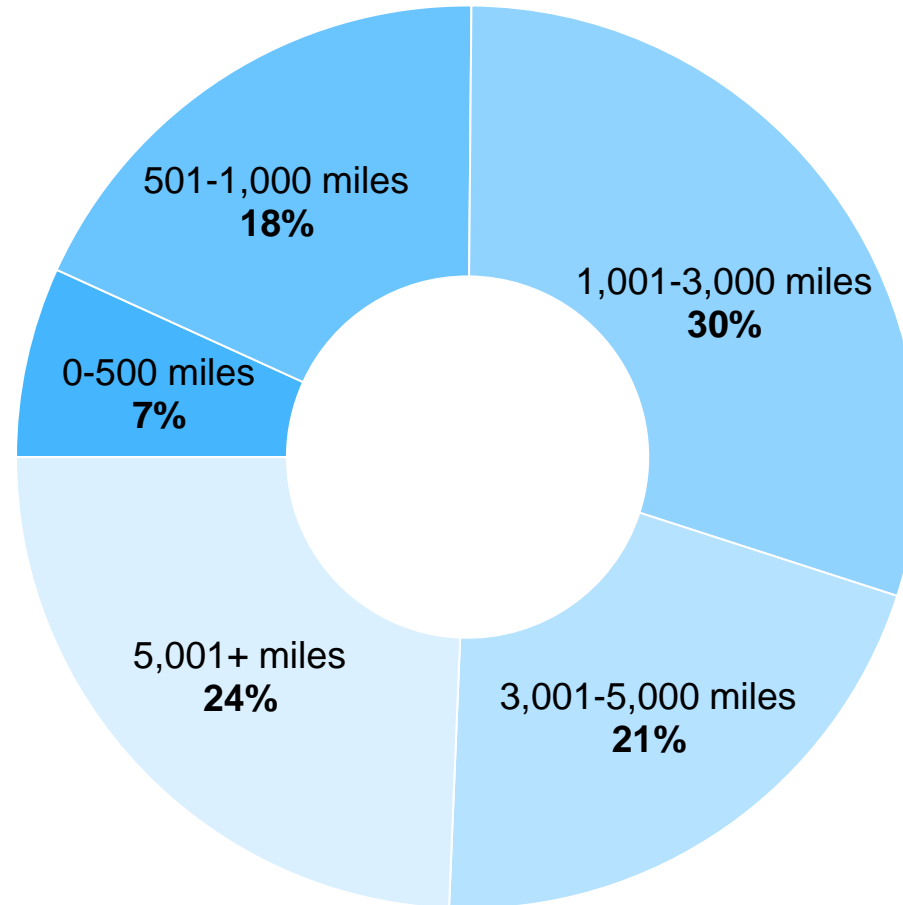
Sample Min. n=50

Australia - Total Annual Holiday Spend



Australia Family Travelers: Annual Vacation

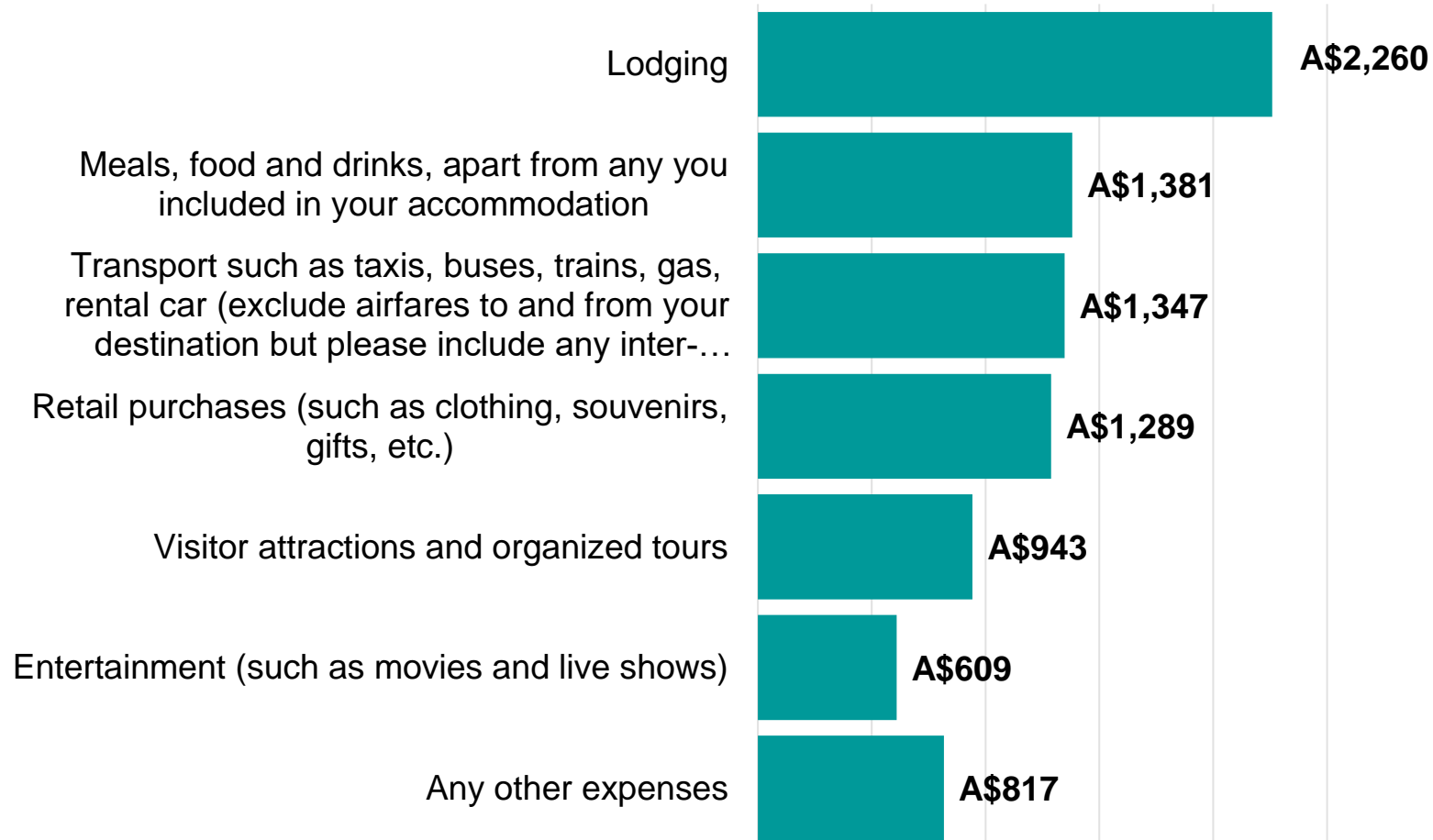
Distance Travelled on Annual Vacation



Sample Size: n=282

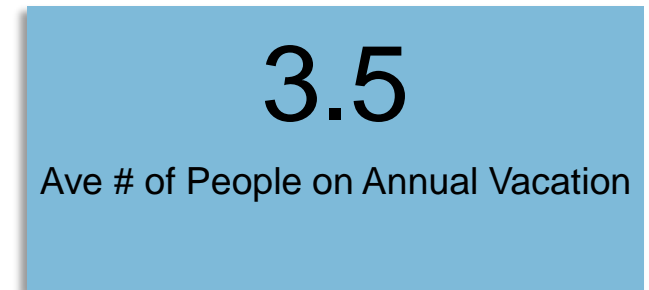
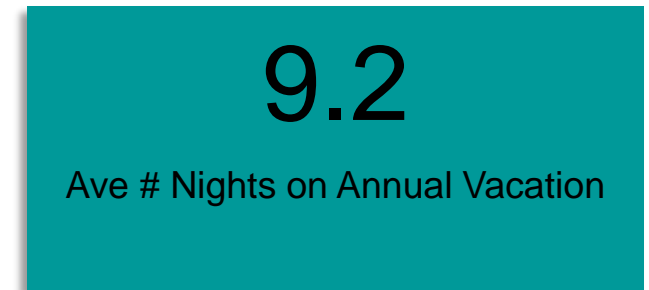
Australia Family Travelers: Annual Vacation

Average Spend



Sample Size: n=282

Spend Per Person Per Day

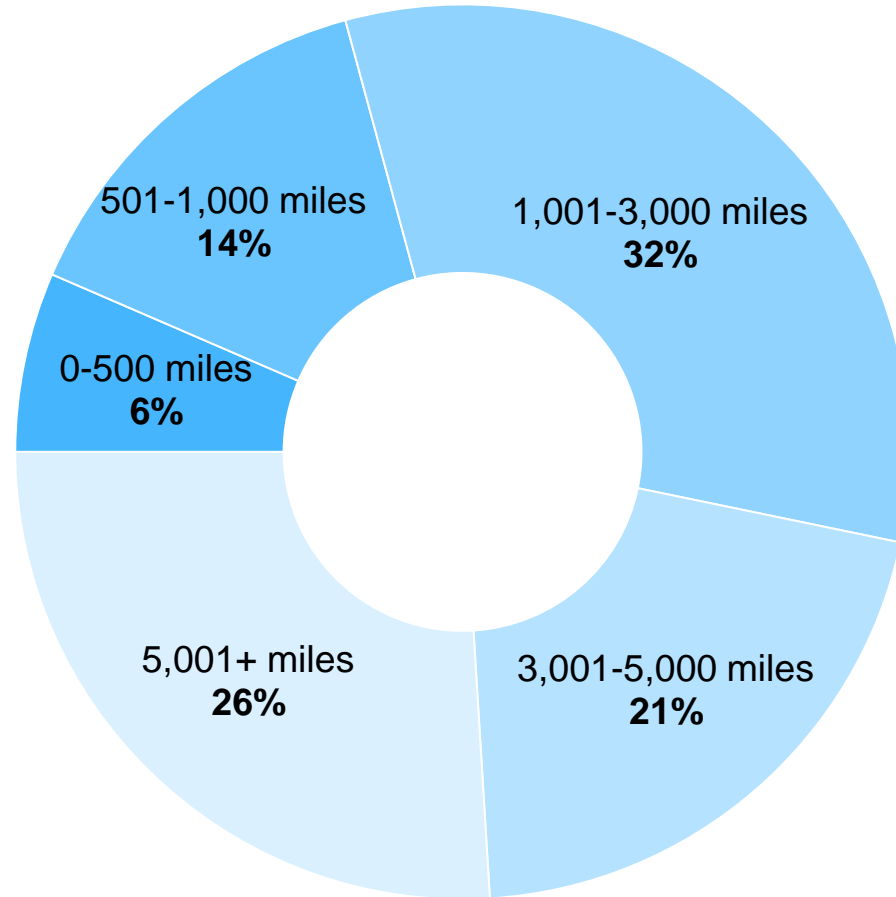


A\$266.80

Ave. Per Person Per Day Spend

Australia Avid Travelers: Annual Vacation

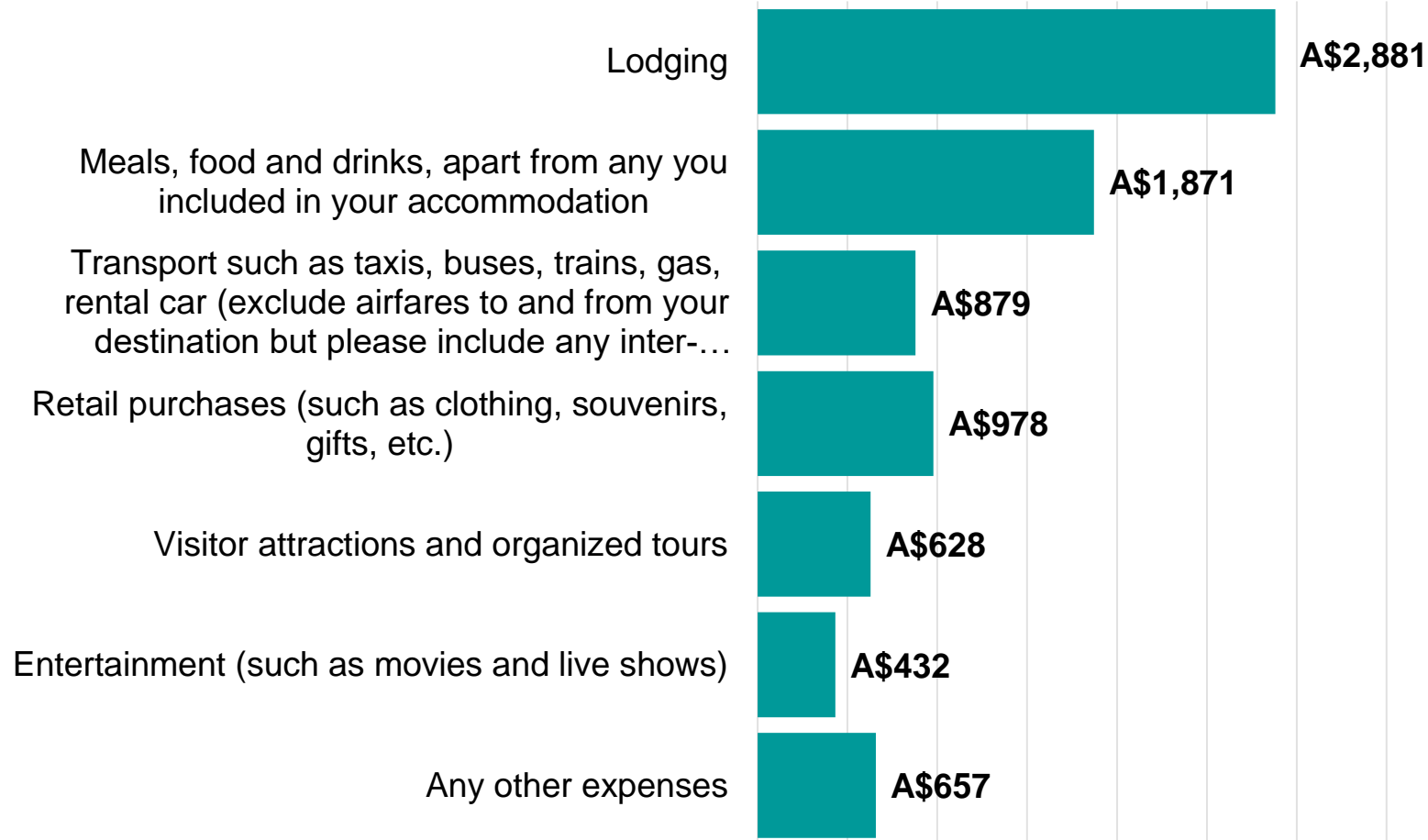
Distance Travelled on Annual Vacation



Sample Size: n=77

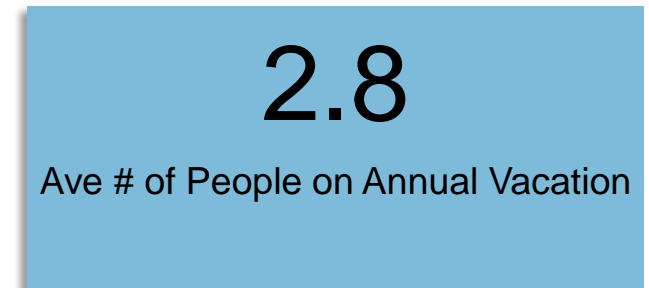
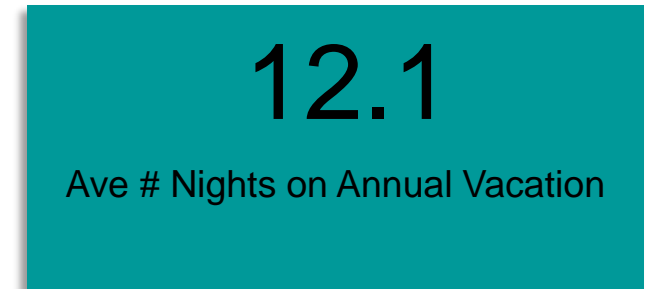
Australia Avid Travelers: Annual Vacation

Average Spend



Sample Size: n=77

Spend Per Person Per Day

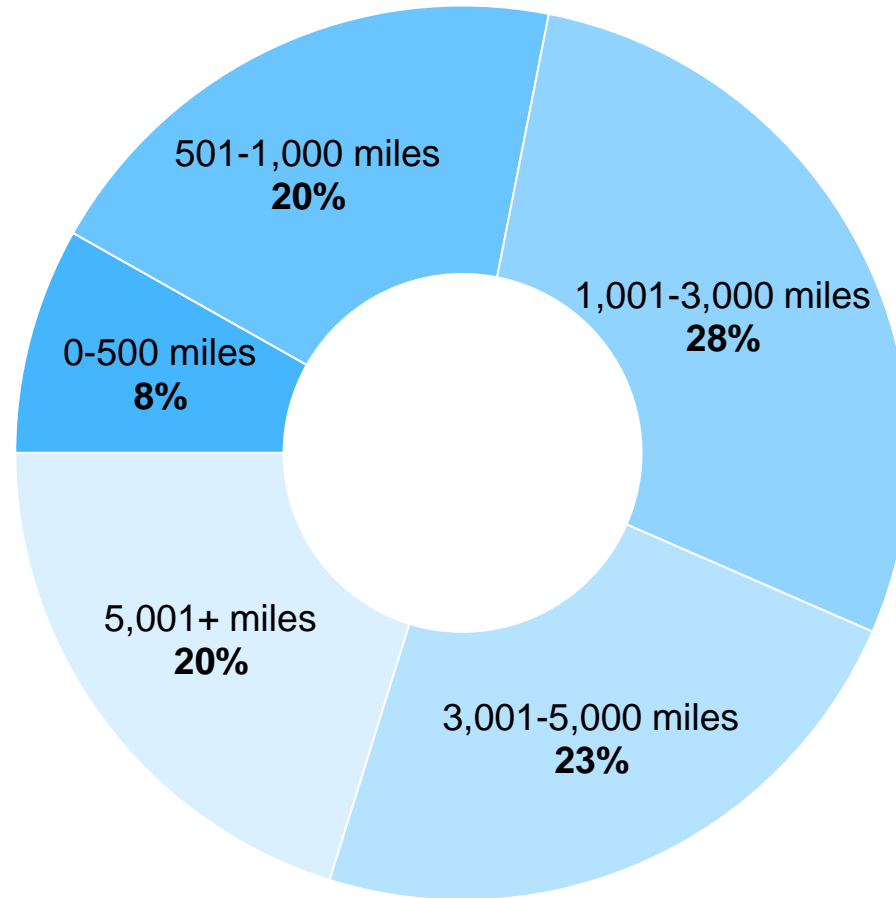


A\$247.53

Ave. Per Person Per Day Spend

Australia Couples Travelers: Annual Vacation

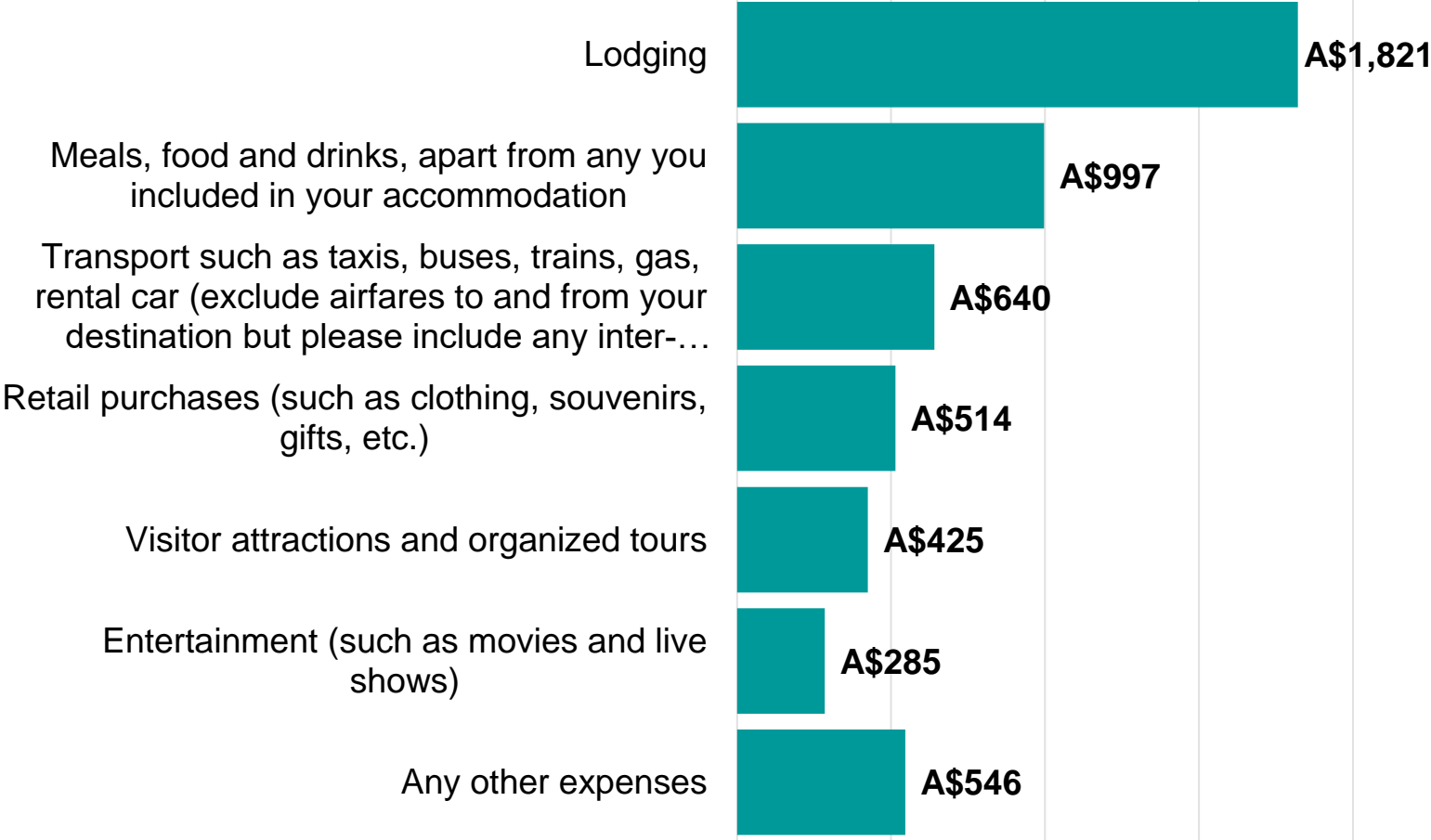
Distance Travelled on Annual Vacation



Sample Size: n=217

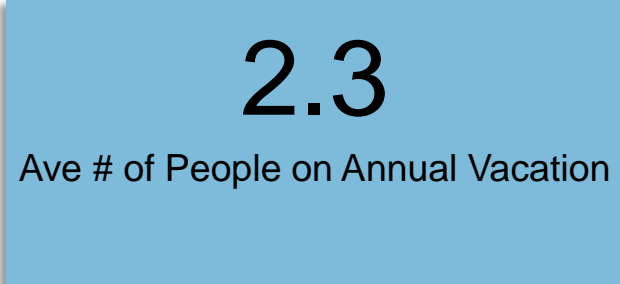
Australia Couples Travelers: Annual Vacation

Average Spend



Sample Size: n=217

Spend Per Person Per Day



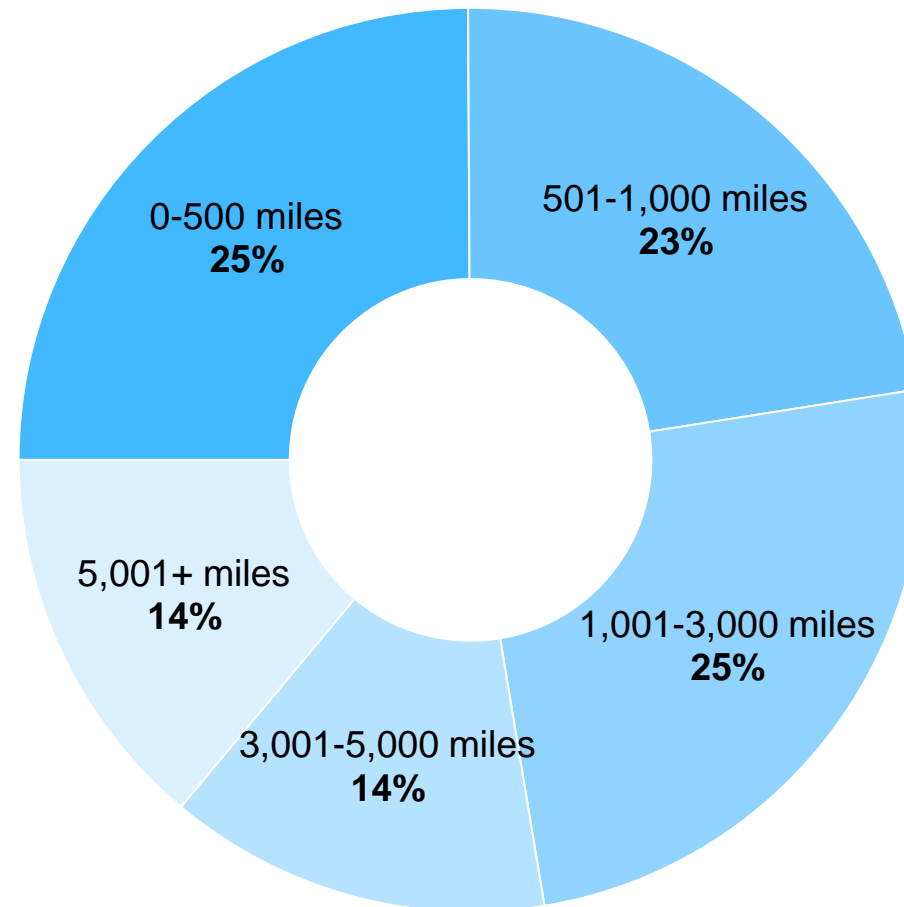
A\$243.95

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.

Australia Nat Rep: Annual Vacation

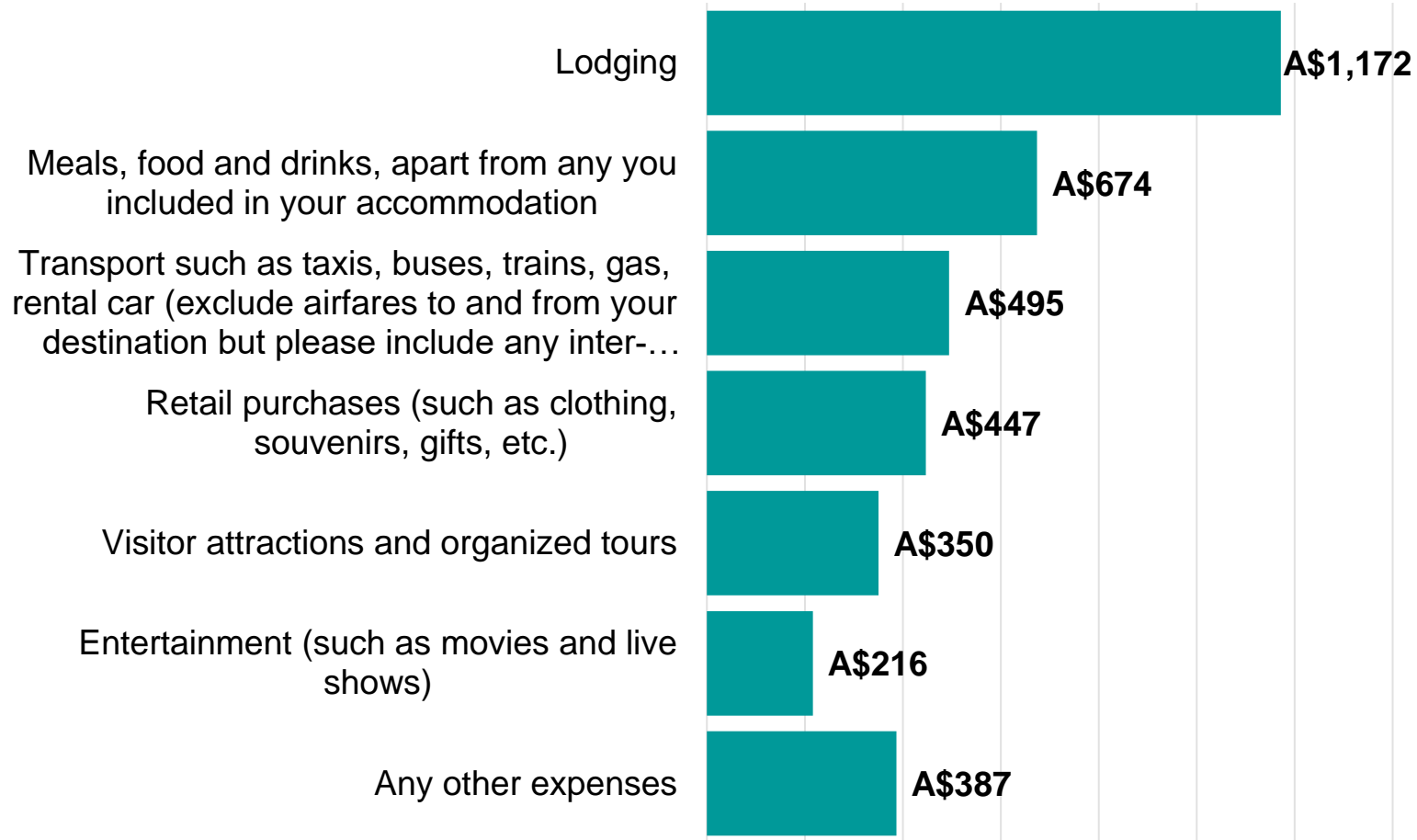
Distance Travelled on Annual Vacation



Sample Size: n=6,985

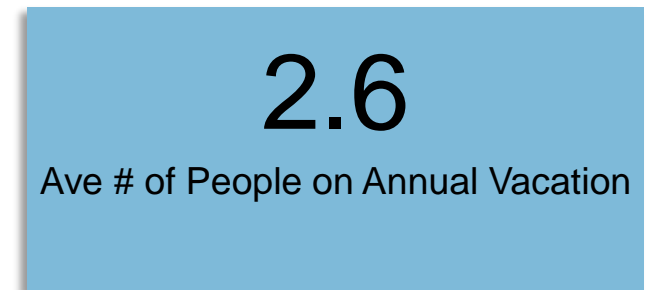
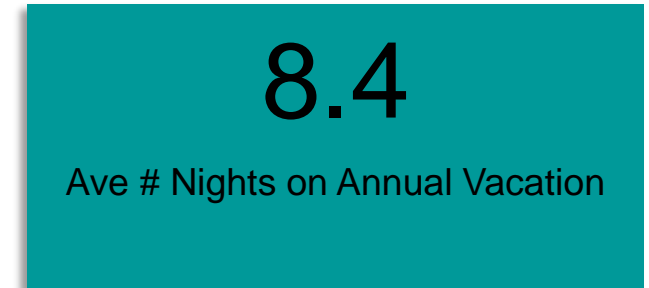
Australia Nat Rep: Annual Vacation

Average Spend



Sample Size: n=6,985

Spend Per Person Per Day



A\$174.65
Ave. Per Person Per Day Spend

Australia - Importance of Travel Factors

	Very Important 5			
	Australia: Family Traveler	Australia: Avid Traveler	Australia: Couples Traveler	Australia Market
Value for money	41%	48%	50%	54%
Comfort and accessibility	39%	34%	34%	42%
Natural attractions/activities	38%	47%	37%	40%
Family friendly locations and activities	41%	28%	21%	30%
Opportunity to experience local restaurants/businesses	34%	41%	38%	34%
Cultural attractions	31%	35%	38%	33%
Entertainment and nightlife	21%	11%	18%	19%
Consideration of sustainable principles	19%	14%	21%	19%
Safe and secure destination	48%	54%	53%	60%

Sample Size:

n=282

*n=239

n=77

*n=71

n=217

*n=181

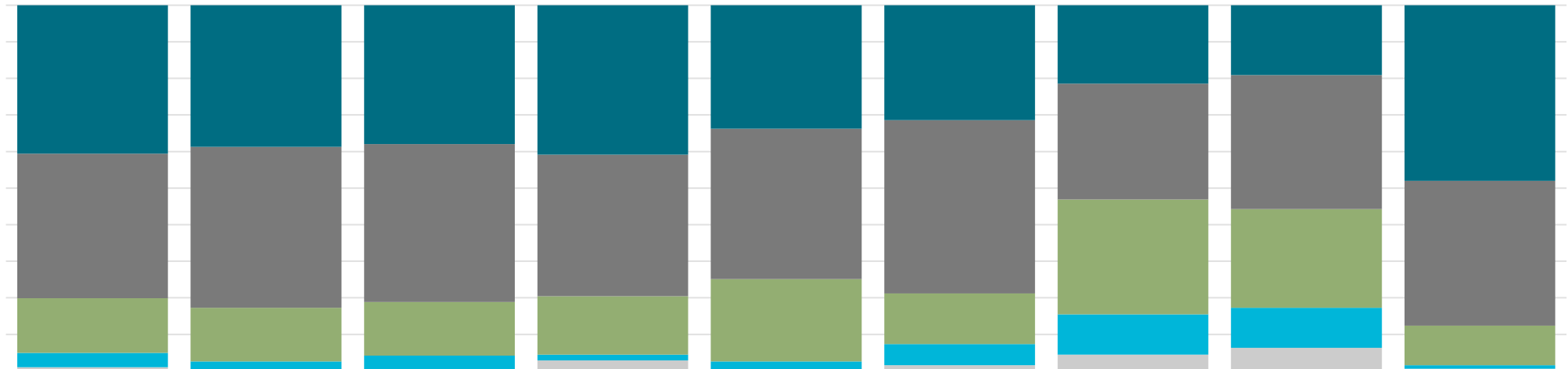
n=6,985

*n=5,887

How important are the following factors in choosing your travel destination. Please rate the following list with 1 = not very important and 5 = very important?

*Because this travel factor was added in March 2024, the sample size of each segment for this particular travel factor is smaller than those of the other travel factors.

Australia Family Travelers: Importance of Travel Factors



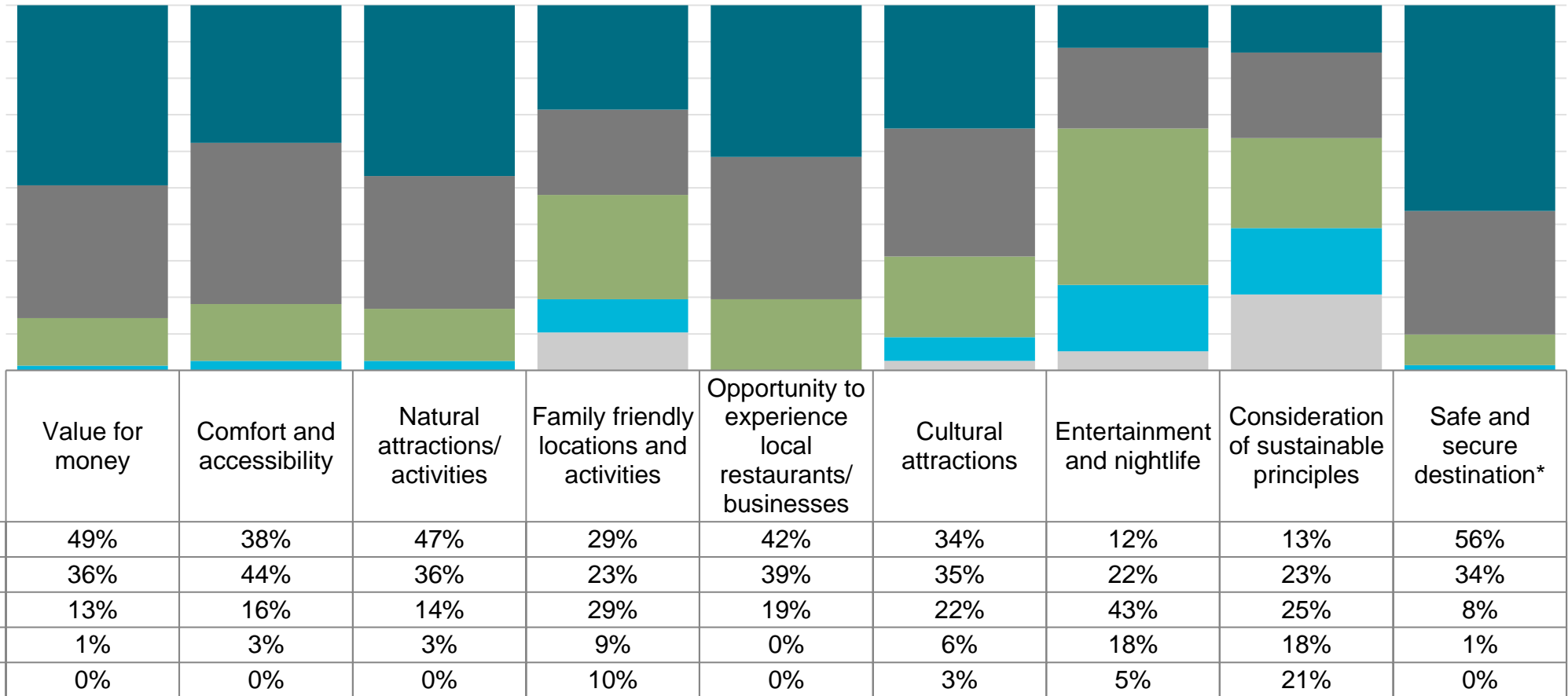
	Value for money	Comfort and accessibility	Natural attractions/activities	Family friendly locations and activities	Opportunity to experience local restaurants/businesses	Cultural attractions	Entertainment and nightlife	Consideration of sustainable principles	Safe and secure destination*
Very Important 5	41%	39%	38%	41%	34%	31%	21%	19%	48%
4	40%	44%	43%	39%	41%	47%	32%	37%	40%
3	15%	15%	15%	16%	23%	14%	31%	27%	11%
2	4%	3%	4%	2%	3%	6%	11%	11%	1%
Not very Important 1	1%	0%	1%	3%	0%	2%	4%	6%	1%

Not very Important 1
 2
 3
 4
 Very Important 5

Sample Size: n=282

*n=239

Australia Avid Travelers: Importance of Travel Factors



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

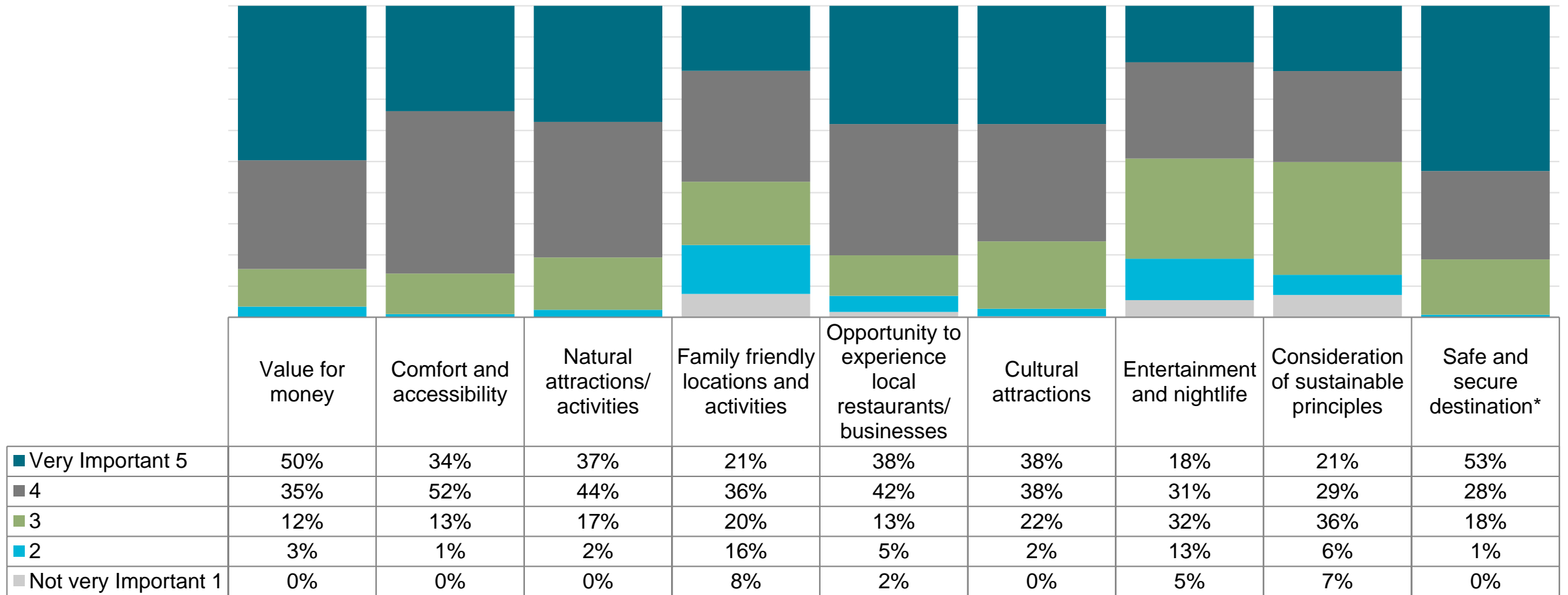
Sample Size: n=77

*n=71

How important are the following factors in choosing your travel destination? Please rate the following list with 1 = not very important and 5 = Very important | Which activities would you participate in if you take a trip to Hawaii?

*Because this travel factor was added in March 2024, the sample size of each segment for this particular travel factor is smaller than those of the other travel factors.

Australia Couples Travelers: Importance of Travel Factors

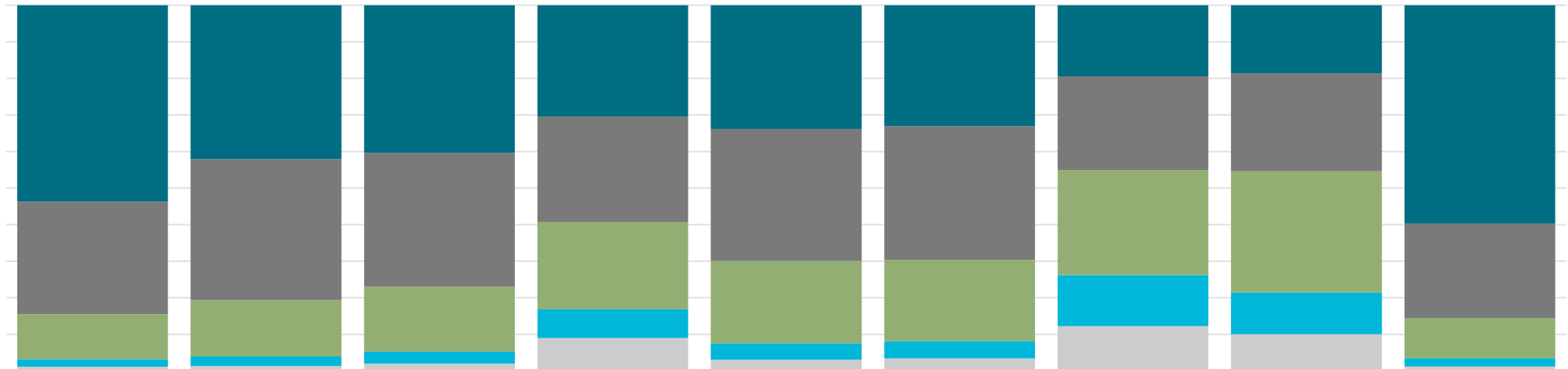


■ Not very Important 1 ■ 2 ■ 3 ■ 4 ■ Very Important 5

Sample Size: n=217

*n=181

Australia 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	54%	42%	40%	30%	34%	33%	19%	19%	60%
4	31%	39%	37%	29%	36%	37%	26%	27%	26%
3	12%	15%	18%	24%	22%	22%	29%	33%	11%
2	2%	3%	3%	8%	5%	5%	14%	11%	2%
Not very Important 1	1%	1%	2%	9%	3%	3%	12%	10%	1%

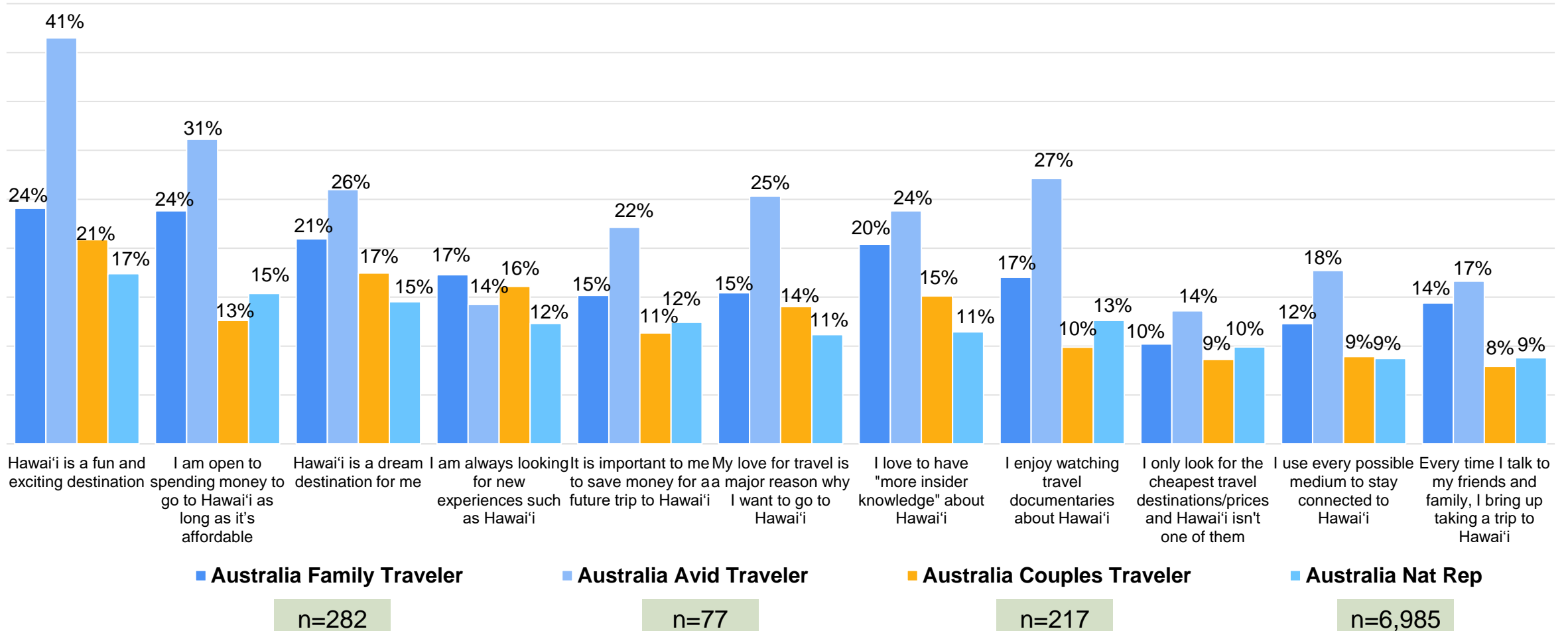
■ Not very Important 1
 ■ 2
 ■ 3
 ■ 4
 ■ Very Important 5

Sample Size: n=6,985

*n=5,887

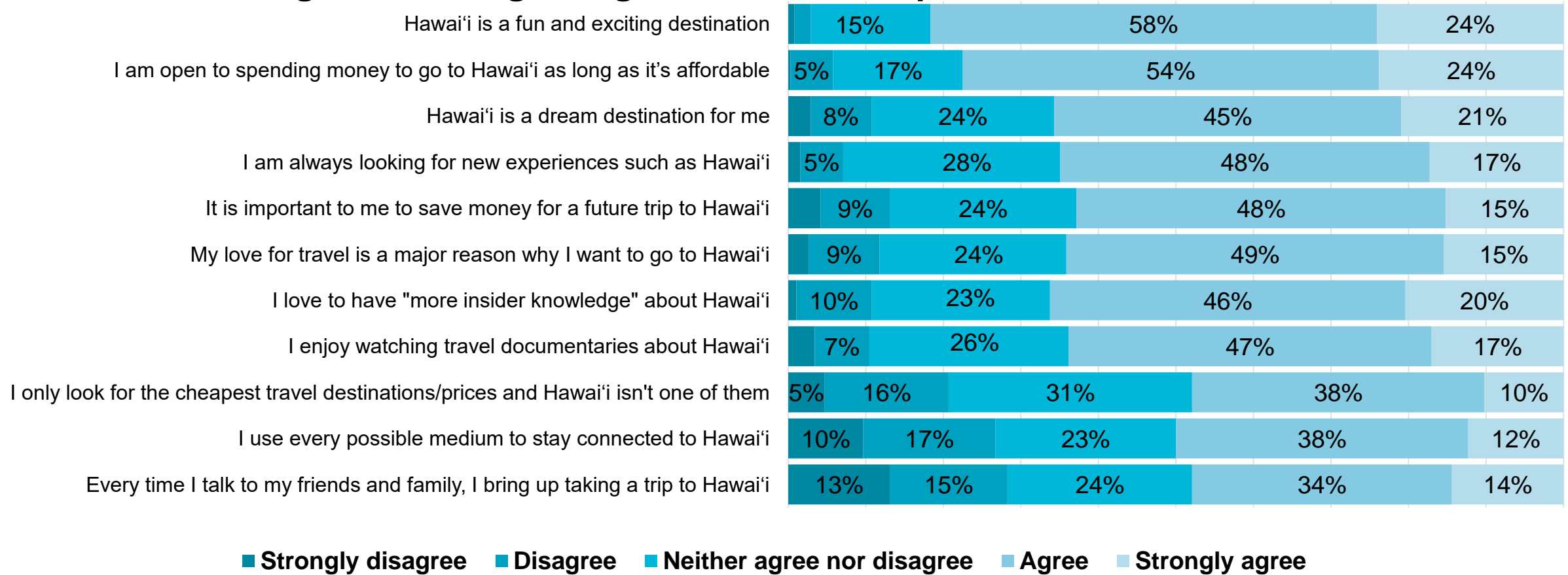
Australia - Hawai'i as an Aspirational Destination

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



Australia Family Travelers: Hawai'i as an Aspirational Destination

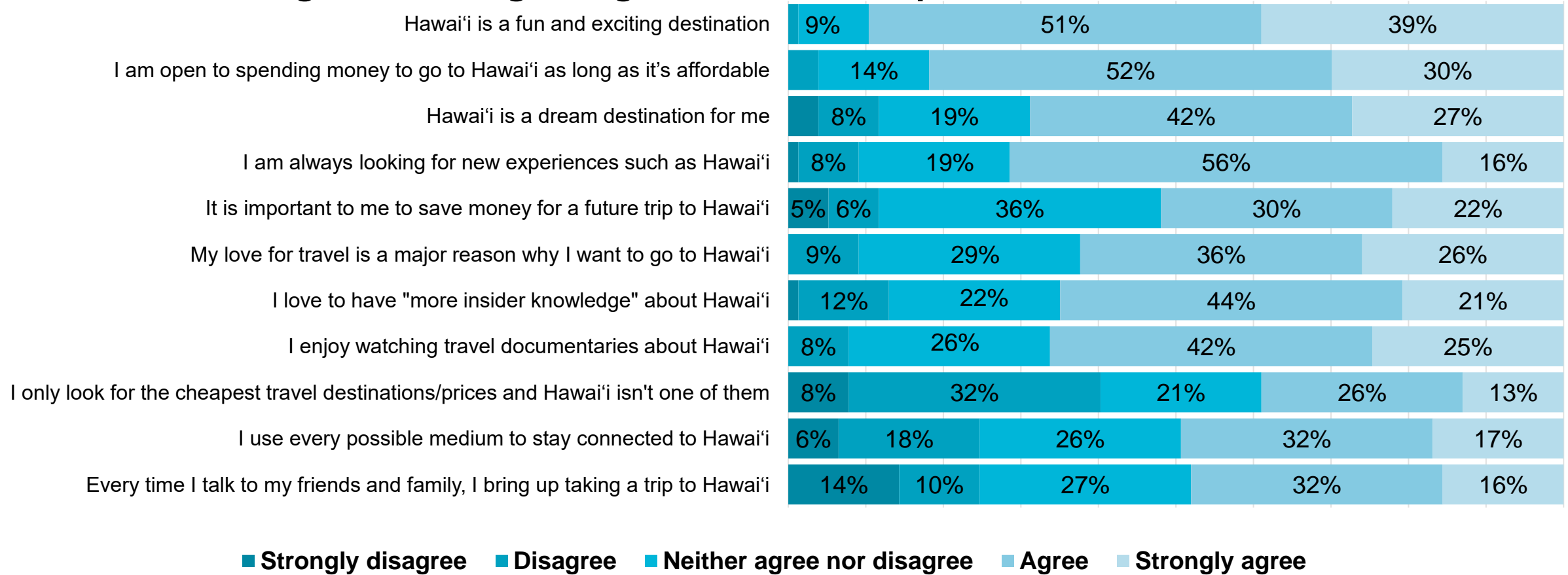
Agreement Regarding Hawai'i as an Aspirational Destination



Sample Size: n=282

Australia Avid Travelers: Hawai'i as an Aspirational Destination

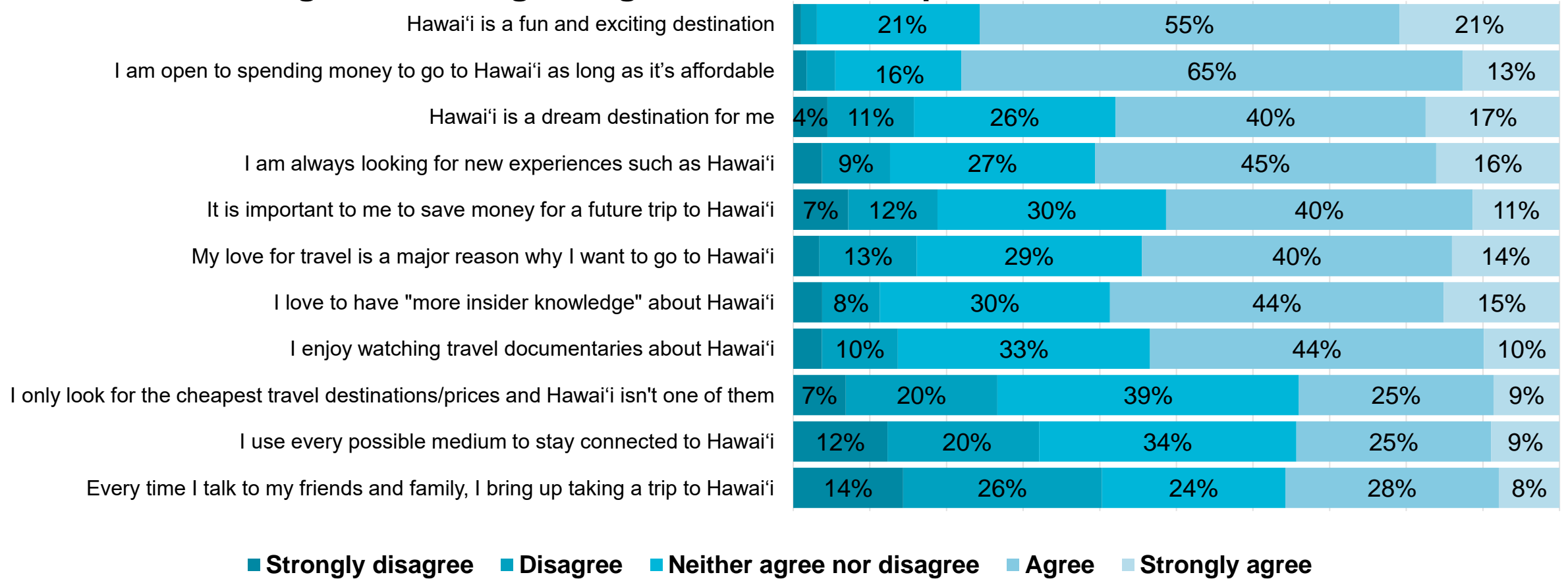
Agreement Regarding Hawai'i as an Aspirational Destination



Sample Size: n=77

Australia Couples Travelers: Hawai'i as an Aspirational Destination

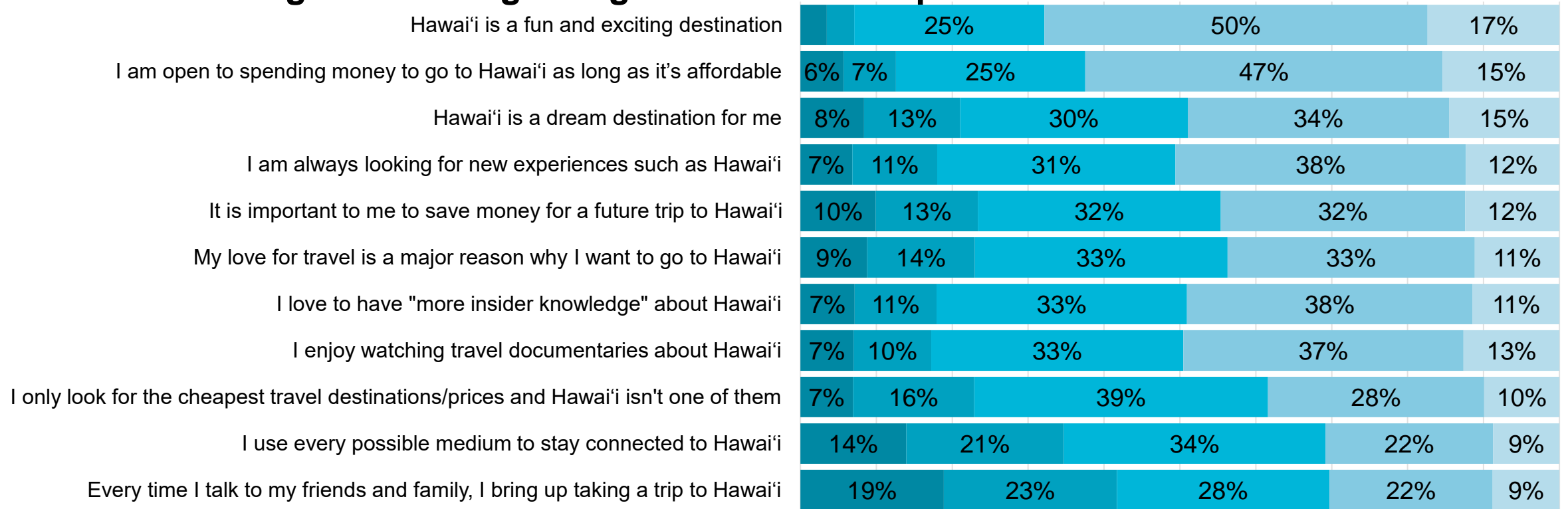
Agreement Regarding Hawai'i as an Aspirational Destination



Sample Size: n=217

Australia Nat Rep: Hawai'i as an Aspirational Destination

Agreement Regarding Hawai'i as an Aspirational Destination

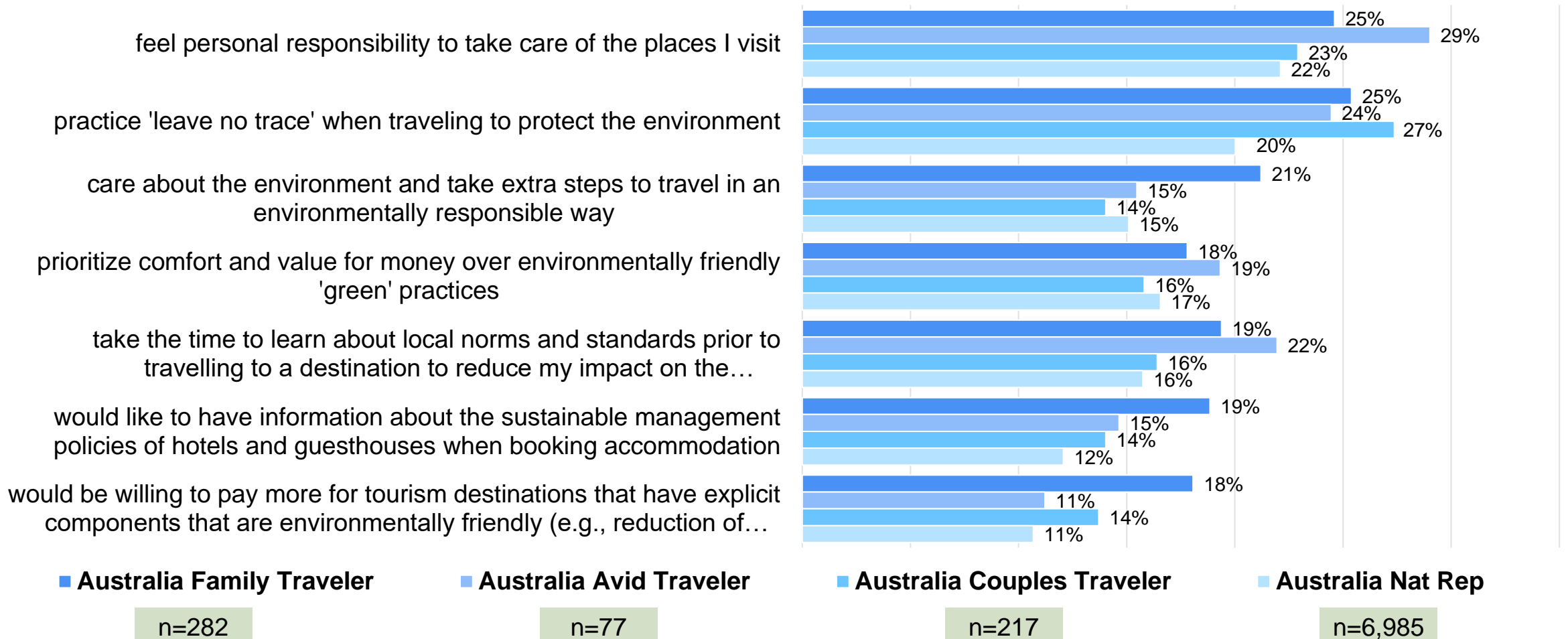


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=6,985

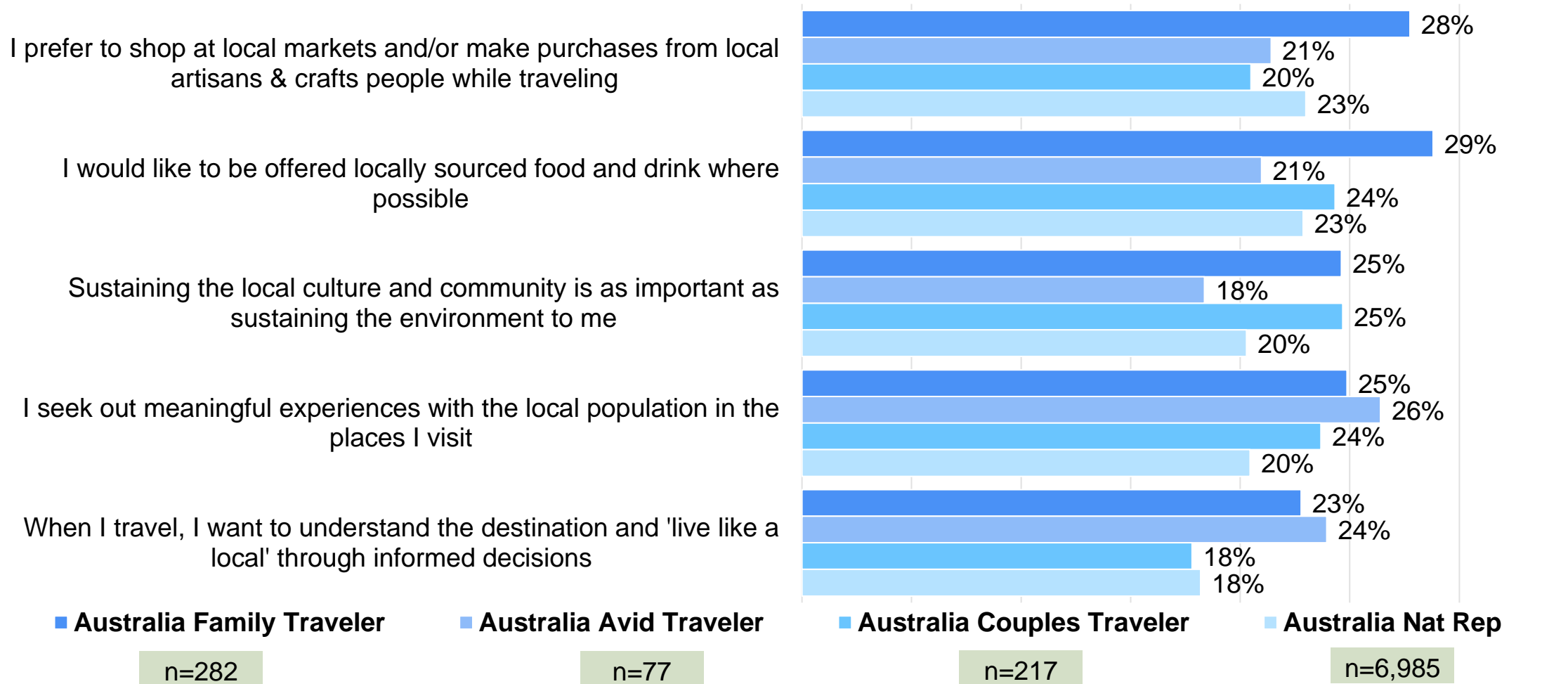
Australia - Sustainability and Travel Responsibility Statements

Agreement Regarding Sustainable Practices While Traveling (Strongly Agree)



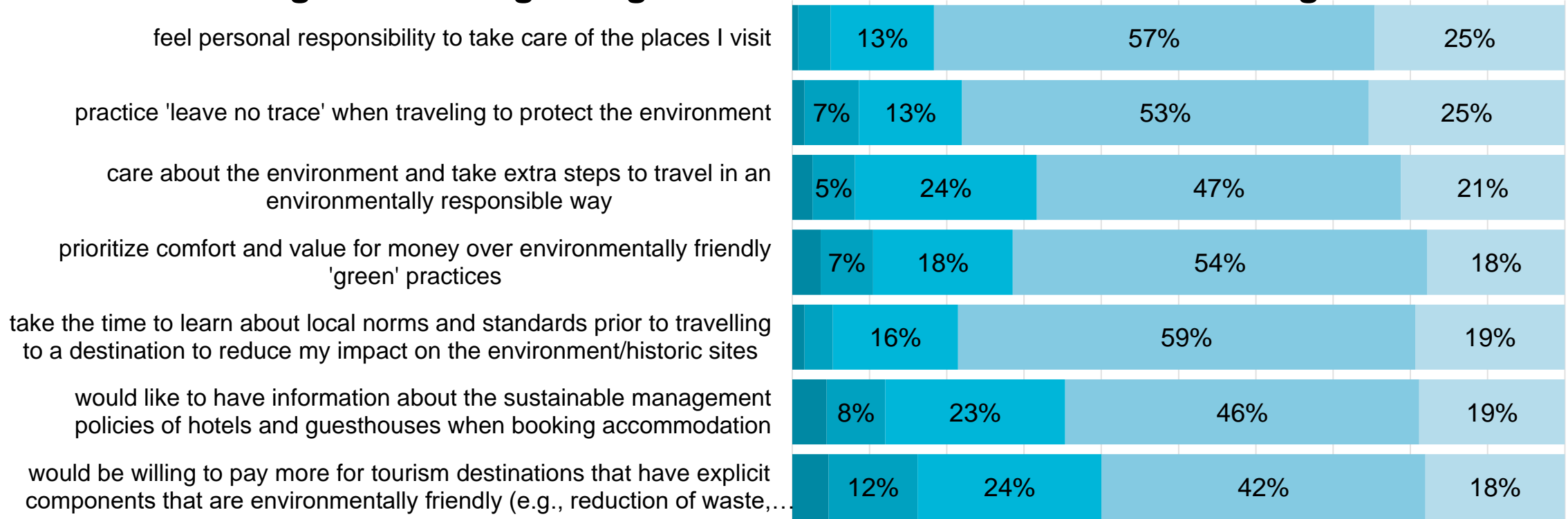
Australia - Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling (Strongly Agree)



Australia Family Travelers: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustainable Practices While Traveling

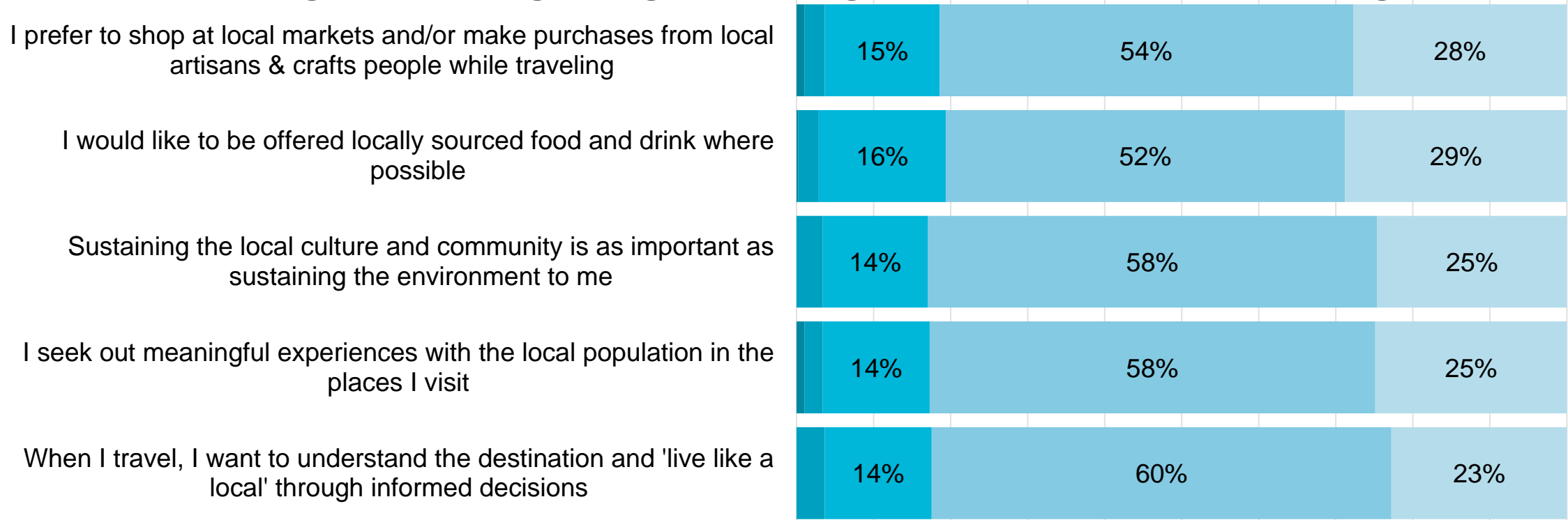


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=282

Australia Family Travelers: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling

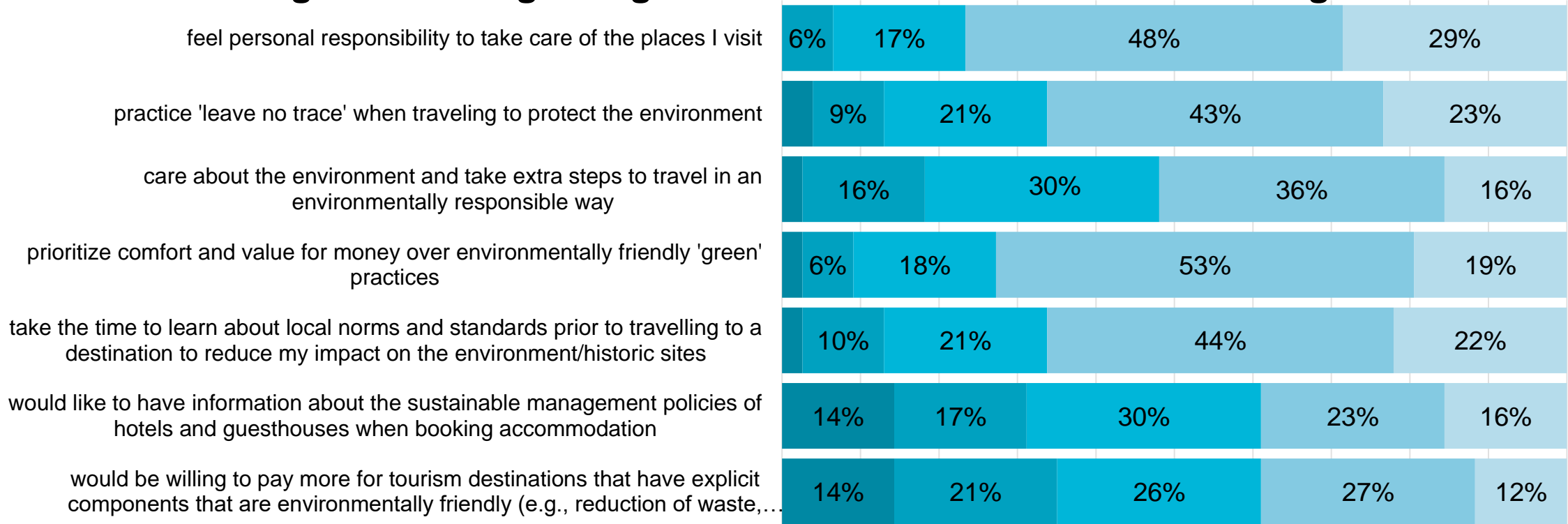


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=282

Australia Avid Travelers: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustainable Practices While Traveling



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

Sample Size: n=77

Australia Avid Travelers: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling

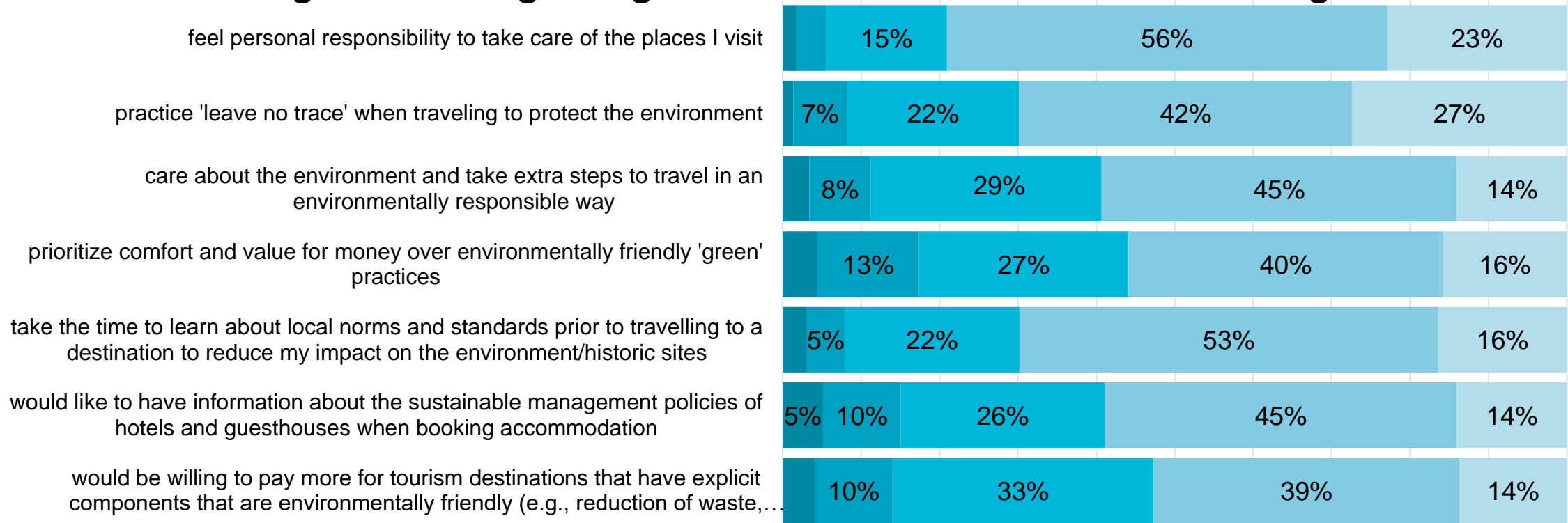


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=77

Australia Couples Travelers: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustainable Practices While Traveling

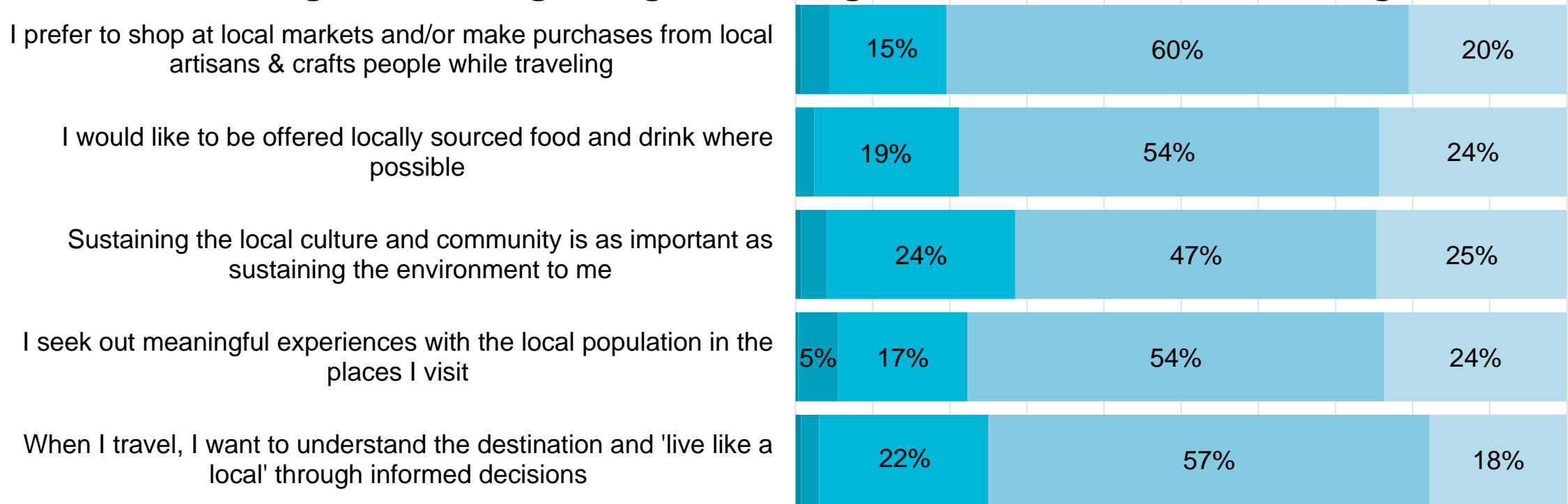


■ Strongly disagree
 ■ Disagree
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 ■ Agree
 ■ Strongly agree

Sample Size: n=217

Australia Couples Travelers: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling

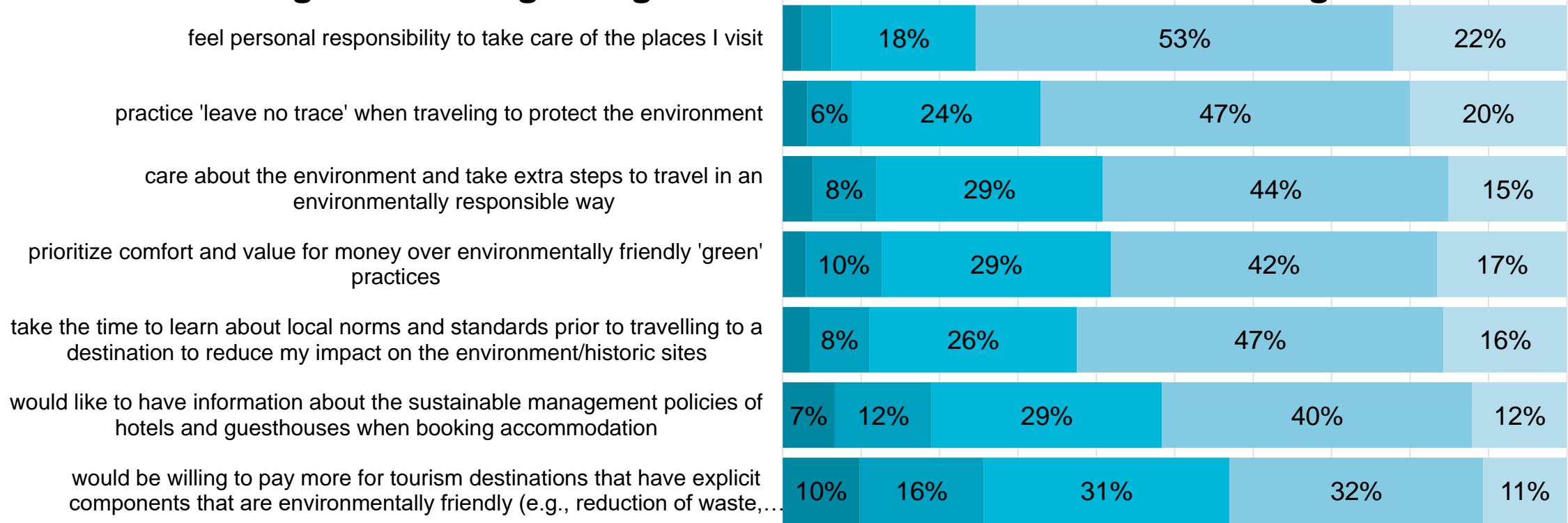


■ Strongly disagree
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Sample Size: n=217

Australia Nat Rep: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustainable Practices While Traveling

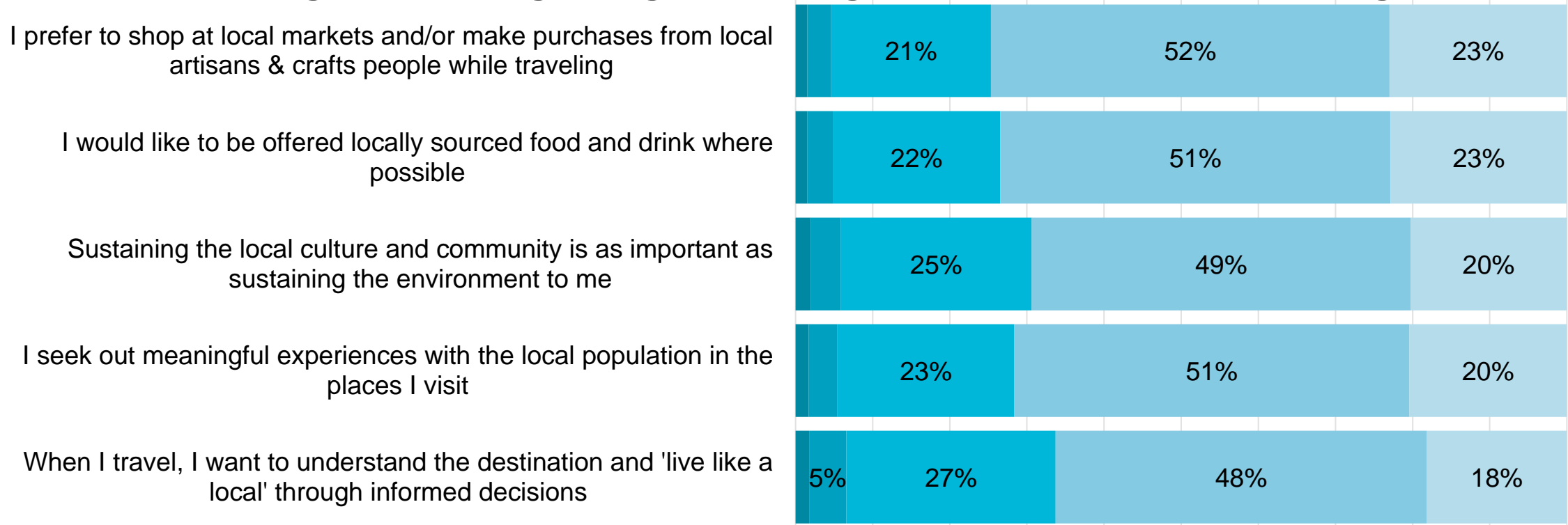


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Sample Size: n=6,985

Australia Nat Rep: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling

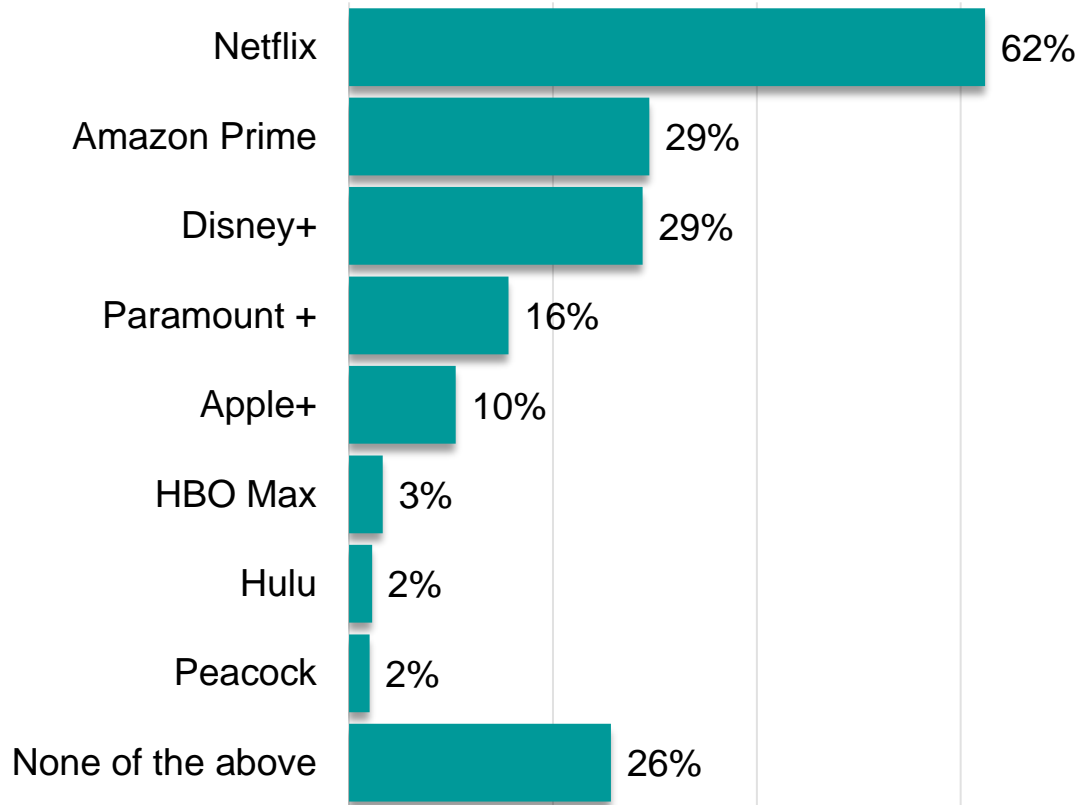


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

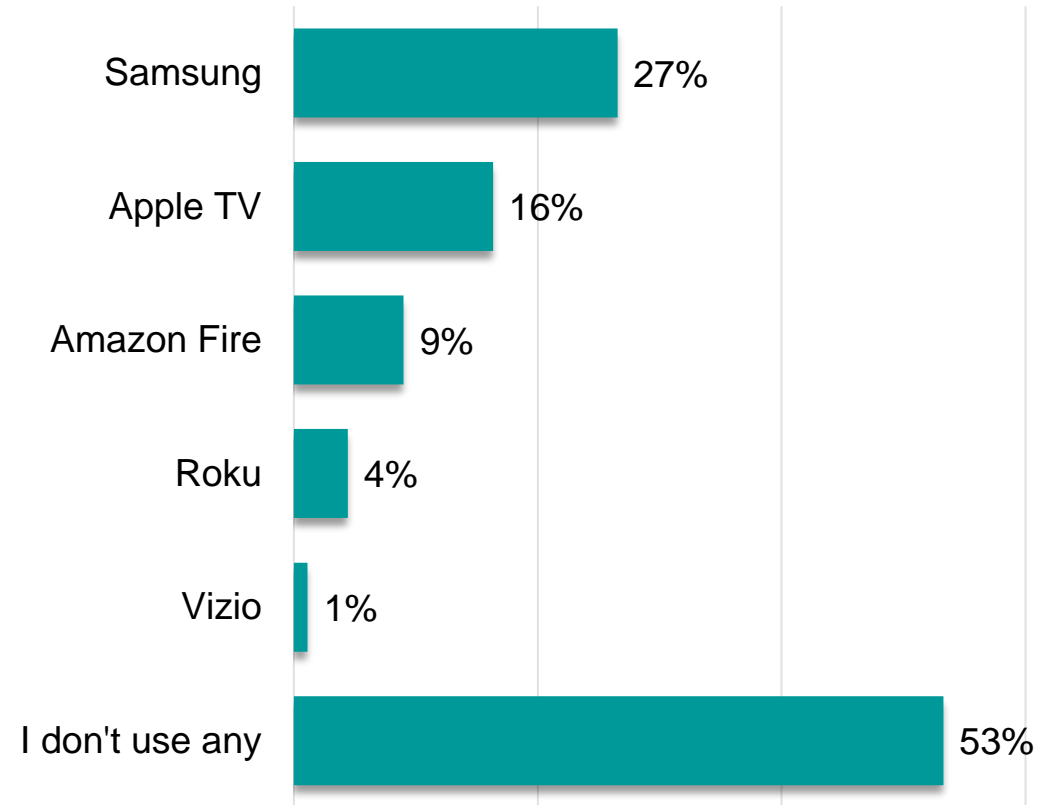
Sample Size: n=6,985

Australia Media Consumption

Streaming Platforms Used Weekly



Connected Device Used

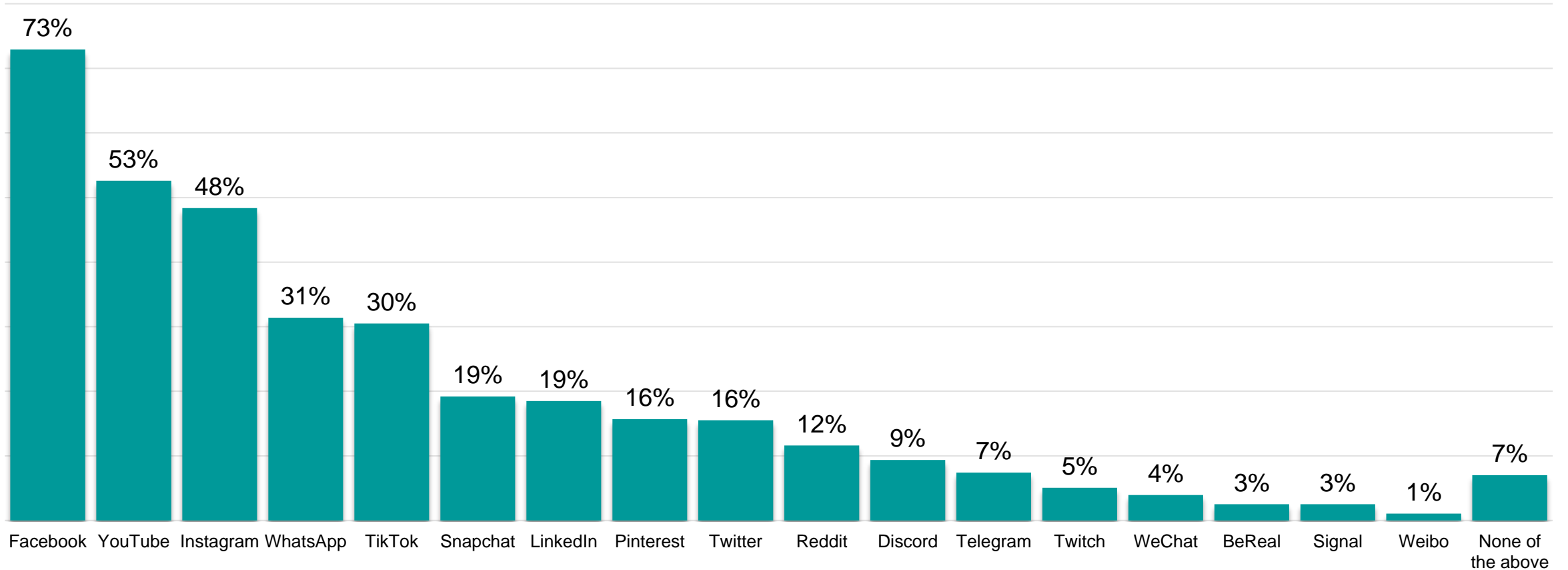


Sample Size: n=6,985

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**

Australia Media Consumption

Social Media Platforms Used Weekly



Sample Size: n=6,985

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**

Australia Media Consumption

Travel Destination Source of Awareness

TV Program/Documentary	31%
Online	34%
Radio	11%
TV commercials	30%
Newspaper	14%
Friends/Family	47%
Social Media	37%
YouTube	32%
Out of Home Advertising (e.g., poster billboards, bus shelter advertisements, etc.)	8%
Email	18%
I don't recall	10%

Actions Taken After Seeing an Ad for a Destination

I go to the destination's website	31%
I search for information about the destination online	45%
I look up the destination on social media	23%
I talk to friends/family about the destination	33%
I book travel to the destination almost immediately	9%
I don't do anything	18%
None of the above	7%

Sample Size: n=6,985

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**