VISION INSIGHTS

Vision Insights Australia Traveler Profiles 2024

January 24, 2025



STATE OF HAWAI'I • 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., 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

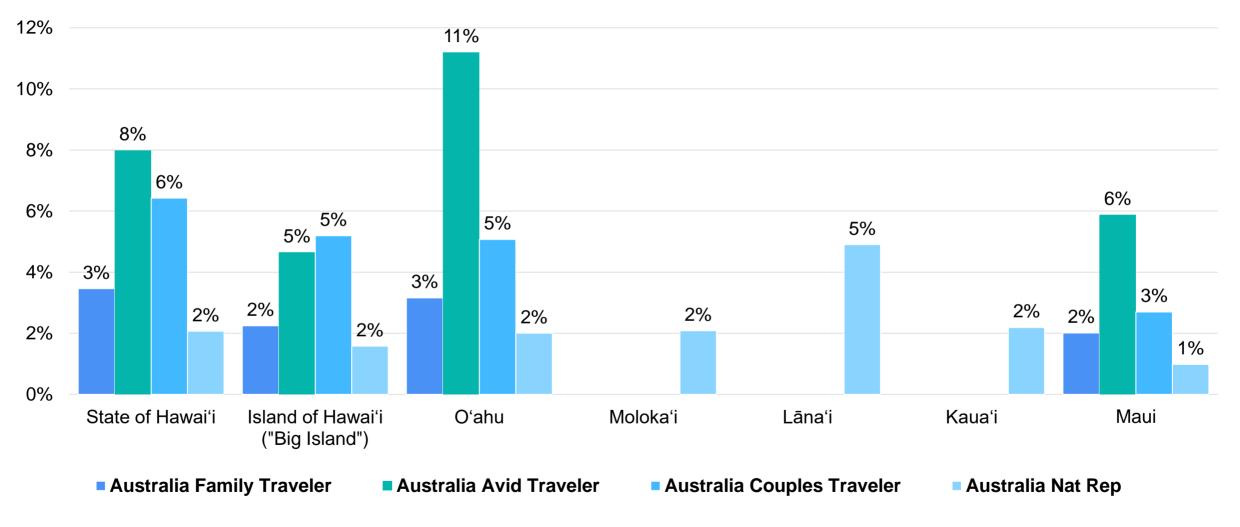
Couples Traveler

- 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)

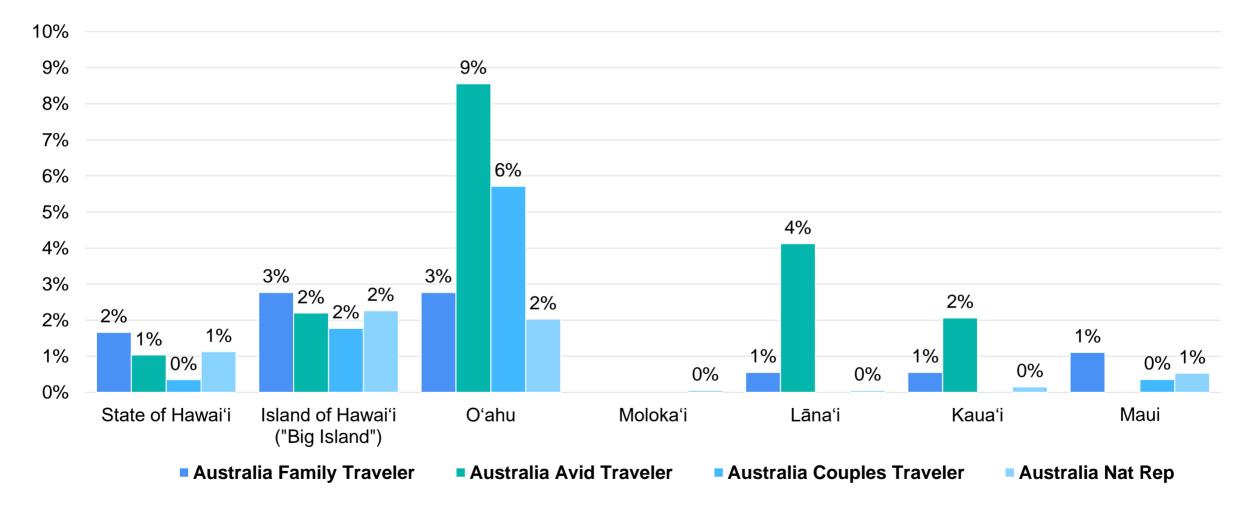
• Representative of Australia adults in terms of age, gender, social class and education

Australia - Leisure Trip in Past 12 Months



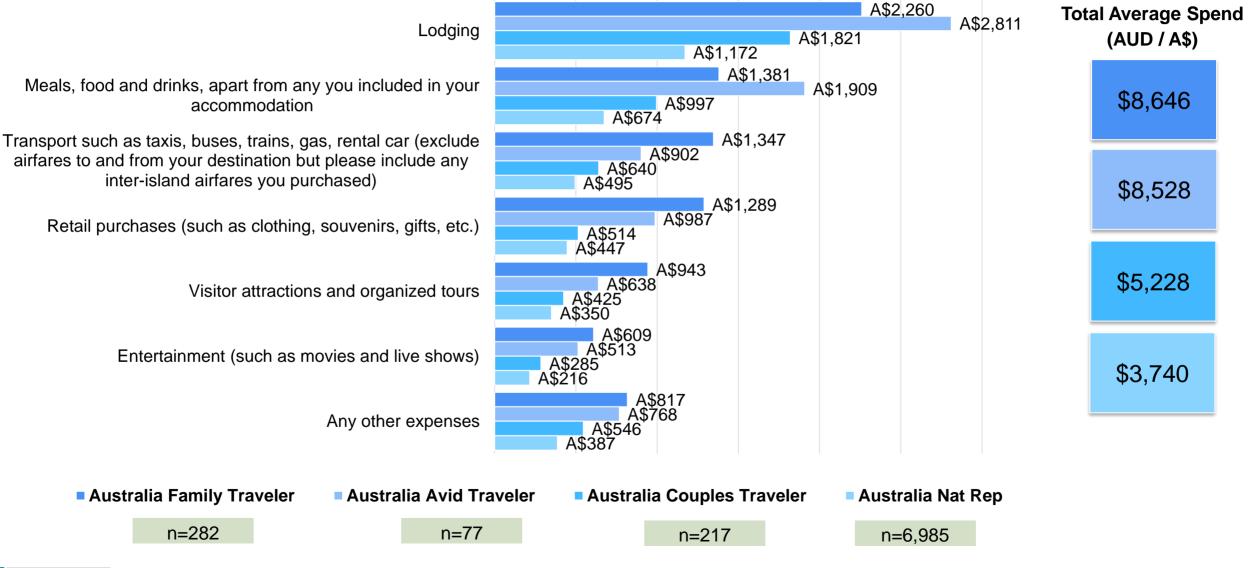
Sample Min. n=50

Australia - Next Destination for Leisure Trip



Sample Min. n=50

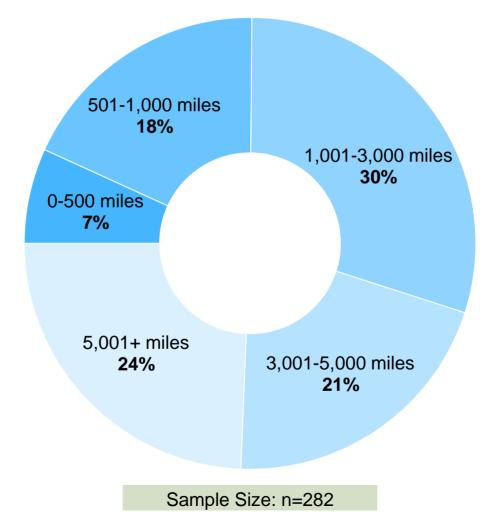
Australia - Total Annual Holiday Spend



January 24, 2025 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 Family Travelers: Annual Vacation

Distance Travelled on Annual Vacation



Australia Family Travelers: Annual Vacation

Average Spend

A\$2,260 Lodaina Meals, food and drinks, apart from any you A\$1,381 included in your accommodation Transport such as taxis, buses, trains, gas, rental car (exclude airfares to and from your A\$1,347 destination but please include any inter... Retail purchases (such as clothing, souvenirs, A\$1,289 gifts, etc.) A\$943 Visitor attractions and organized tours Entertainment (such as movies and live shows) A\$609 A\$817 Any other expenses Sample Size: n=282



January 24, 2025 in the box next to it.

Australia Avid Travelers: Annual Vacation **Distance Travelled on Annual Vacation** 501-1,000 miles 1,001-3,000 miles 14% 32% 0-500 miles 6% 5,001+ miles 3,001-5,000 miles 26% 21% Sample Size: n=77

Australia Avid Travelers: Annual Vacation

Average Spend

January 24, 2025

10

A\$2,881 Lodaina Meals, food and drinks, apart from any you A\$1,871 included in your accommodation Transport such as taxis, buses, trains, gas, rental car (exclude airfares to and from your A\$879 destination but please include any inter-... Retail purchases (such as clothing, souvenirs, A\$978 gifts, etc.) Visitor attractions and organized tours A\$628 Entertainment (such as movies and live shows) A\$432 A\$657 Any other expenses Sample Size: n=77

Spend Per Person Per Day 12.1Ave # Nights on Annual Vacation 2.8 Ave # of People on Annual Vacation A\$247.53

Ave. Per Person Per Day Spend

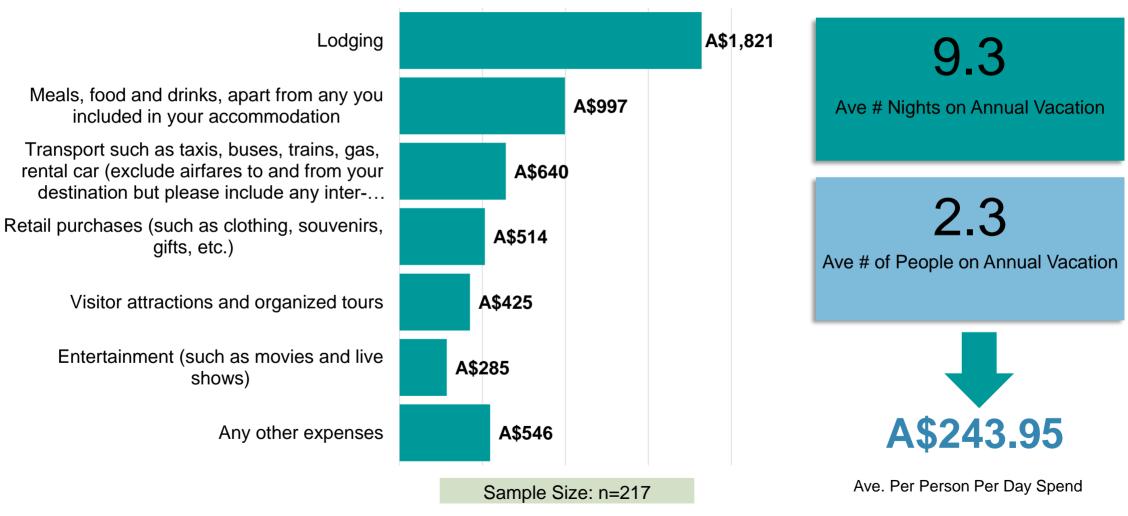
Australia Couples Travelers: Annual Vacation Distance Travelled on Annual Vacation 501-1,000 miles 20% 1,001-3,000 miles 28% 0-500 miles 8% 5,001+ miles 20% 3,001-5,000 miles 23% Sample Size: n=217

Australia Couples Travelers: Annual Vacation

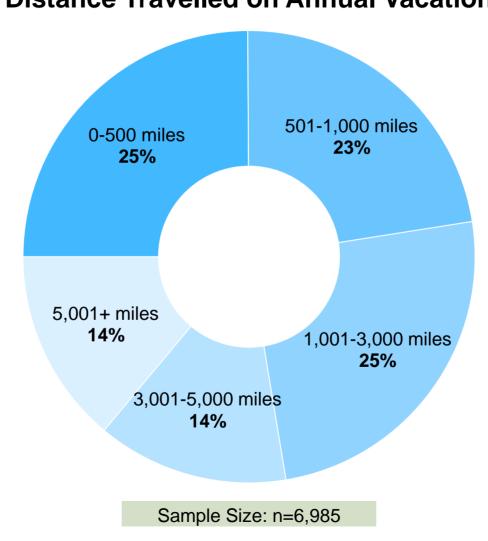
Average Spend

January 24, 2025

Spend Per Person Per Day



Australia Nat Rep: Annual Vacation Distance Travelled on Annual Vacation



Australia Nat Rep: Annual Vacation

Average Spend

January 24, 2025

Spend Per Person Per Day

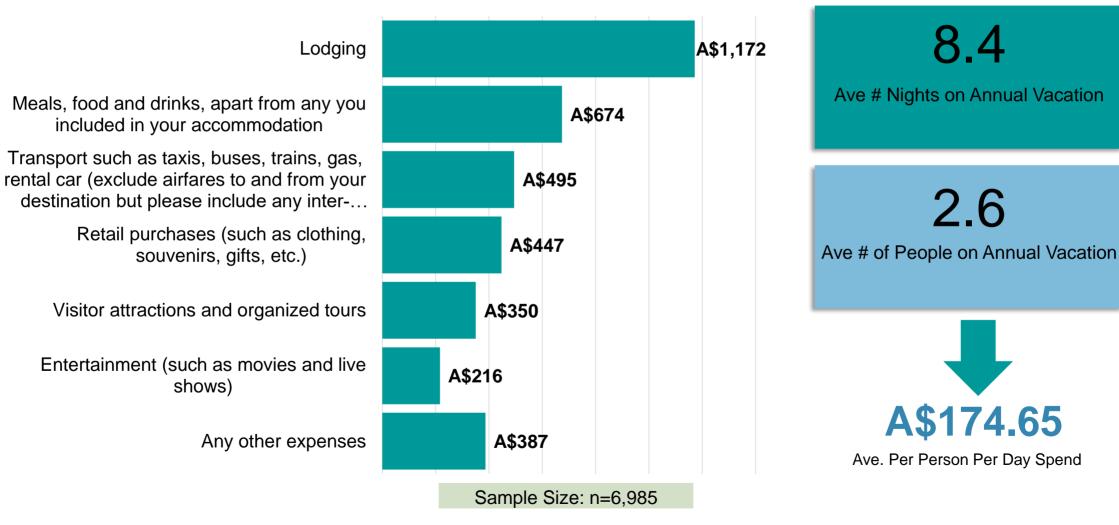
-4

Ave # Nights on Annual Vacation

2.6

A\$174.65

Ave. Per Person Per Day Spend



Australia - Importance of Travel Factors

		Very Imp	portant 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

January 24, 2025 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

3

4

Very Important 5

Sample Size: n=282

2

January 24, 2025

> 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 Hawai'i? *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 Avid 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	49%	38%	47%	29%	42%	34%	12%	13%	56%
■ 4	36%	44%	36%	23%	39%	35%	22%	23%	34%
■3	13%	16%	14%	29%	19%	22%	43%	25%	8%
2	1%	3%	3%	9%	0%	6%	18%	18%	1%
Not very Important 1	0%	0%	0%	10%	0%	3%	5%	21%	0%

Not very Important 1

2 3 ■4

Very Important 5

Sample Size: n=77

17 January 24, 2025
> 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 Hawai'i? *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

			_						
r									
	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	50%	34%	37%	21%	38%	38%	18%	21%	53%
■ 4	35%	52%	44%	36%	42%	38%	31%	29%	28%
■3	12%	13%	17%	20%	13%	22%	32%	36%	18%
2	3%	1%	2%	16%	5%	2%	13%	6%	1%
Not very Important 1	0%	0%	0%	8%	2%	0%	5%	7%	0%

Not very Important 1

2 3 Very Important 5

Sample Size: n=217

January 24, 2025

> 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 Hawai'i? *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.

4

Australia Nat Rep: Importance of Travel Factors

									-
									-
						-			-
	-								
	-								
							-		-
Г					Opportunity to				
	Value for money	Comfort and accessibility	Natural attractions/ activities	Family friendly locations and activities		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

3

■4

Very Important 5

Sample Size: n=6,985

2

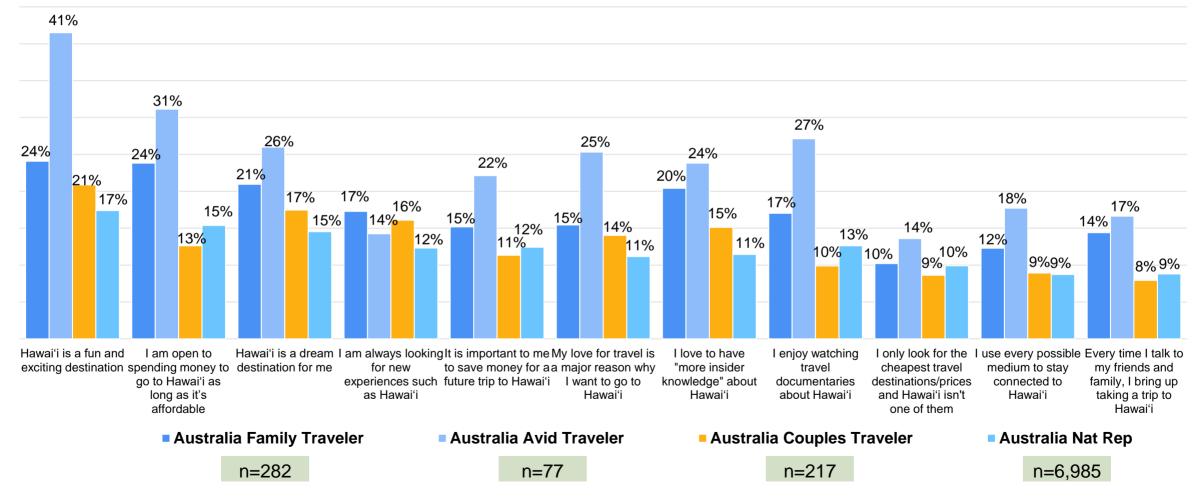
January 24, 2025

> 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 Hawai'i? *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 - 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

n	15%	, D	58%	58%				
Э	5%	17%	54	54%				
Э	8%	24%		45%	21%			
i	5%	28%		48%	17%			
i	9%	24%		48%	15%			
i	9%	24%		49%	15%			
i	10%	23%		46%	20%			
i	7%	26%		47%	17%			
ı	5% 10	6%	31%	38	3% 10%			
i	10%	17%	23%	38%	6 12%			
i	13%	15%	24%	34%	6 14%			

Hawai'i is a fun and exciting destination I am open to spending money to go to Hawai'i as long as it's affordable Hawai'i is a dream destination for me I am always looking for new experiences such as Hawai'i It is important to me to save money for a future trip to Hawai'i My love for travel is a major reason why I want to go to Hawai'i I love to have "more insider knowledge" about Hawai'i I enjoy watching travel documentaries about Hawai'i I only look for the cheapest travel destinations/prices and Hawai'i isn't one of them I use every possible medium to stay connected to Hawai'i Every time I talk to my friends and family, I bring up taking a trip to Hawai'i

Strongly disagree Disagree Neither agree nor disagree Agree Strongly agree

Australia Avid Travelers: Hawai'i as an Aspirational Destination

Agreement Regarding Hawai'i as an Aspirational Destination

destination	9%		51%			39%	
affordable	14	%	52	2%		30%	6
tion for me	8%	19%		42%		27	%
as Hawaiʻi	8%	19%		56%			16%
to Hawaiʻi	5% 6%	3	6%	3	30%	2	22%
to Hawaiʻi	9%	29%		36%		26	5%
out Hawaiʻi	12%	22%		44%			21%
out Hawaiʻi	8%	26%		42%		2	5%
ne of them	8%	32%		21%	26%	%	13%
to Hawaiʻi	6%	18%	26%		32%		17%
to Hawaiʻi	14%	10%	27%		32%		16%

Hawai'i is a fun and exciting de I am open to spending money to go to Hawai'i as long as it's a Hawai'i is a dream destinati I am always looking for new experiences such a It is important to me to save money for a future trip t My love for travel is a major reason why I want to go t I love to have "more insider knowledge" about I enjoy watching travel documentaries about I only look for the cheapest travel destinations/prices and Hawai'i isn't one I use every possible medium to stay connected t Every time I talk to my friends and family, I bring up taking a trip t

Strongly disagree Disagree Neither agree nor disagree Agree Strongly agree

Australia Couples Travelers: Hawai'i as an Aspirational Destination

Agreement Regarding Hawai'i as an Aspirational Destination

21%		55%		21%
16%		65%		13%
<mark>4%</mark> 11%	26%	40%	, D	17%
9%	27%	45%		16%
7% 12%	30%		40%	11%
13%	29%	4	0%	14%
8%	30%	449	6	15%
10%	33%		44%	10%
7% 20%		39%	25%	9%
12%	20%	34%	25%	9%
14%	26%	24%	28%	8%

Hawai'i is a fun and exciting destination I am open to spending money to go to Hawai'i as long as it's affordable Hawai'i is a dream destination for me I am always looking for new experiences such as Hawai'i It is important to me to save money for a future trip to Hawai'i My love for travel is a major reason why I want to go to Hawai'i I love to have "more insider knowledge" about Hawai'i I enjoy watching travel documentaries about Hawai'i I only look for the cheapest travel destinations/prices and Hawai'i isn't one of them I use every possible medium to stay connected to Hawai'i Every time I talk to my friends and family, I bring up taking a trip to Hawai'i

Strongly disagree Disagree Neither agree nor disagree Agree Strongly agree

Australia Nat Rep: Hawai'i as an Aspirational Destination

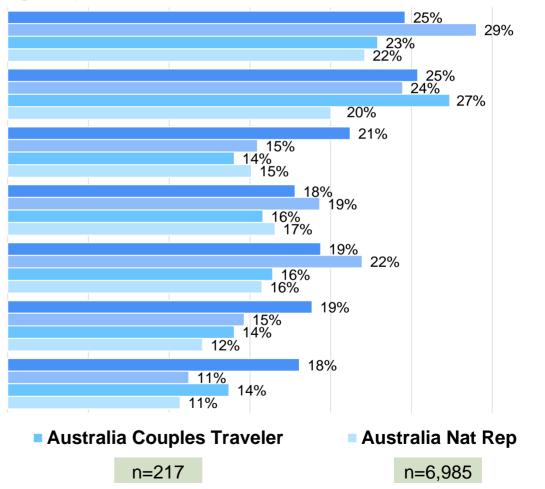
Agreement Regarding Hawai'i as an Aspirational Destination

		25%	6			5	0%			1	7%
6%	7%		25%				47%	6			15%
8%	13	%		30%				34%	6		15%
7%	11%			31%				38%	6		12%
10%	6 1	3%		32	%			32	2%		12%
9%	14	1%		33	%			3	33%		11%
7%	11%	,		33%				38	%		11%
7%	10%			33%				37%	%		13%
7%	16	%		3	39%				28%		10%
14	1%		21%		3	4%			22	%	9%
	19%		23	%		28	%		22	%	9%

Hawai'i is a fun and exciting destination I am open to spending money to go to Hawai'i as long as it's affordable Hawai'i is a dream destination for me I am always looking for new experiences such as Hawai'i It is important to me to save money for a future trip to Hawai'i My love for travel is a major reason why I want to go to Hawai'i I love to have "more insider knowledge" about Hawai'i I enjoy watching travel documentaries about Hawai'i I only look for the cheapest travel destinations/prices and Hawai'i isn't one of them I use every possible medium to stay connected to Hawai'i Every time I talk to my friends and family, I bring up taking a trip to Hawai'i

Strongly disagree Disagree Neither agree nor disagree Agree Strongly agree

Australia - Sustainability and Travel Responsibility Statements Agreement Regarding Sustainable Practices While Traveling (Strongly Agree)



feel personal responsibility to take care of the places I visit

practice 'leave no trace' when traveling to protect the environment

care about the environment and take extra steps to travel in an environmentally responsible way

prioritize comfort and value for money over environmentally friendly 'green' practices

take the time to learn about local norms and standards prior to travelling to a destination to reduce my impact on the...

would like to have information about the sustainable management policies of hotels and guesthouses when booking accommodation

would be willing to pay more for tourism destinations that have explicit components that are environmentally friendly (e.g., reduction of...



Australia Avid Traveler

n=77



2025 Please indicate your level of agreement or disagreement with each of the following statements regarding sustainability and environmental practices while you are travelling. | Please indicate the extent to which you agree or disagree with the following statements about sustainability of culture and community.

Australia - Sustainability and Travel Responsibility Statements Agreement Regarding Sustaining Local Culture While Traveling (Strongly Agree)

28% I prefer to shop at local markets and/or make purchases from local 21% 20% artisans & crafts people while traveling 23% 29% I would like to be offered locally sourced food and drink where 21% 24% possible 23% 25% Sustaining the local culture and community is as important as 18% 25% sustaining the environment to me 20% 25% I seek out meaningful experiences with the local population in the 26% 24% places I visit 20% 23% When I travel. I want to understand the destination and 'live like a 24% 18% local' through informed decisions 18% Australia Avid Traveler Australia Couples Traveler Australia Family Traveler Australia Nat Rep n=6,985 n=282 n=217 n=77

January 24, 2025 Please indicate your level of agreement or disagreement with each of the following statements regarding sustainability and environmental practices while you are travelling. | Please indicate the extent to which you agree or disagree with the following statements about sustainability of culture and community.

Australia Family Travelers: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustainable Practices While Traveling

feel personal responsibility to take care of the places I visit
practice 'leave no trace' when traveling to protect the environment
care about the environment and take extra steps to travel in an
environmentally responsible way
prioritize comfort and value for money over environmentally friendly
'green' practices
take the time to learn about local norms and standards prior to travelling
to a destination to reduce my impact on the environment/historic sites
would like to have information about the sustainable management
policies of hotels and guesthouses when booking accommodation
would be willing to pay more for tourism destinations that have explicit
components that are environmentally friendly (e.g., reduction of waste,....

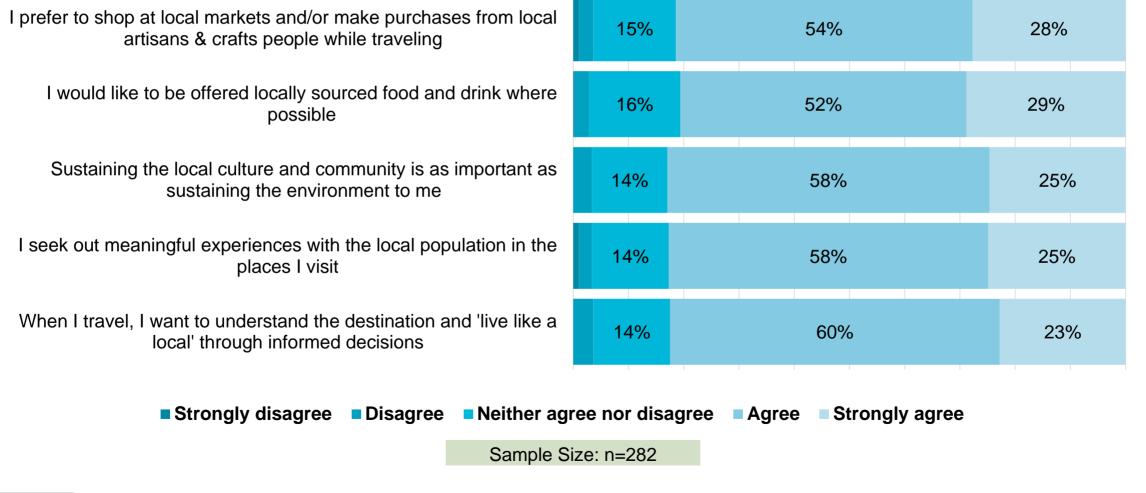
27

	13%		57%	25%	
7%	13%		53%		25%
5%	24	%	47%		21%
7%	18	%	54%		18%
	16%		59%		19%
8%	6	23%	46%	ó	19%
1	2%	24%	42	2%	18%

Strongly disagree Disagree Neither agree nor disagree Agree Strongly agree

Australia Family Travelers: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling



January 24, 2025 Please indicate your level of agreement or disagreement with each of the following statements regarding sustainability and environmental practices while you are travelling. | Please indicate the extent to which you agree or disagree with the following statements about sustainability of culture and community.

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Australia Avid Travelers: Sustainability and Travel Responsibility Statements

29

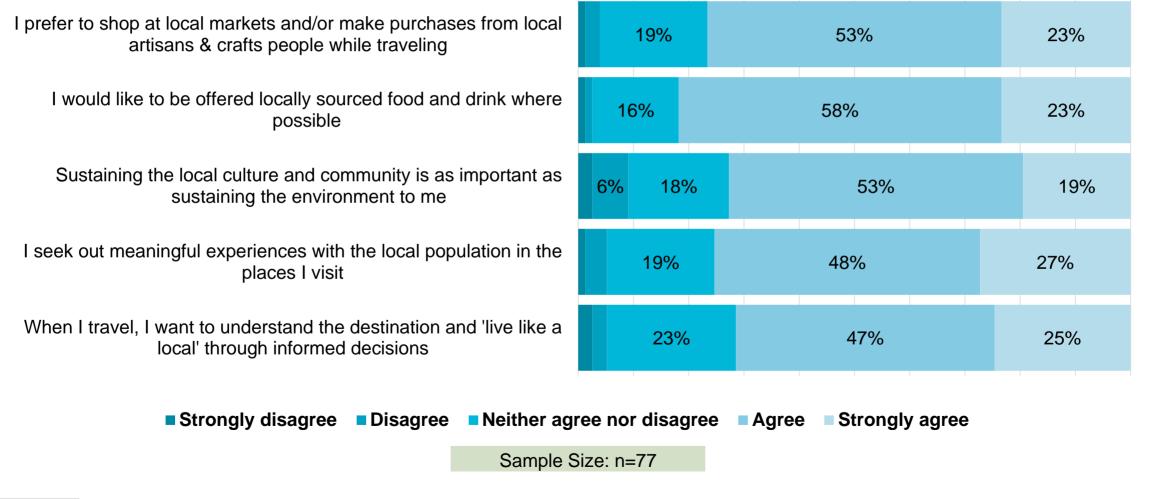
Agreement Regarding Sustainable Practices While Traveling

feel personal responsibility to take care of the places I visit	6%	17%		48%	⁄0		29	%
practice 'leave no trace' when traveling to protect the environment	9%	6 21	21% 43%				23%	
care about the environment and take extra steps to travel in an environmentally responsible way	16% 30% 36%			36%		16%		
prioritize comfort and value for money over environmentally friendly 'green' practices	6%	18%			53%			19%
take the time to learn about local norms and standards prior to travelling to a destination to reduce my impact on the environment/historic sites	109	% 21	%		44%			22%
would like to have information about the sustainable management policies of hotels and guesthouses when booking accommodation	14%	6 17	%	30%		23%		16%
would be willing to pay more for tourism destinations that have explicit components that are environmentally friendly (e.g., reduction of waste,	14%	6 2	1%	26%	%	27%	6	12%
Strongly disagree Disagree Neither age		-	e Agre	e St	trongly	agree		
Sample	Size: r	า=77						

January 24, 2025 Please indicate your level of agreement or disagreement with each of the following statements regarding sustainability and environmental practices while you are travelling. | Please indicate the extent to which you agree or disagree with the following statements about sustainability of culture and community.

Australia Avid Travelers: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling



January 24, 2025 Please indicate your level of agreement or disagreement with each of the following statements regarding sustainability and environmental practices while you are travelling. | Please indicate the extent to which you agree or disagree with the following statements about sustainability of culture and community.

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Australia Couples Travelers: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustainable Practices While Traveling

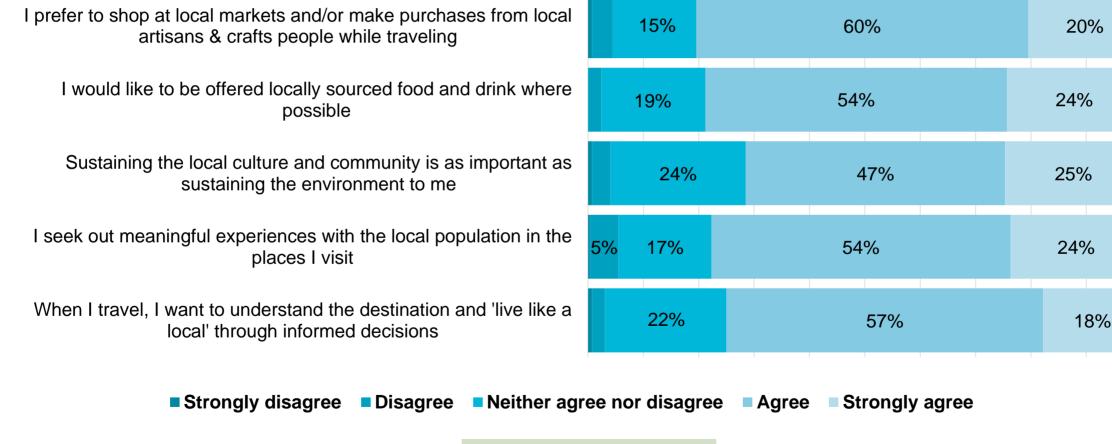
feel personal responsibility to take care of the places I visit	15	9%	56%	23%
practice 'leave no trace' when traveling to protect the environment	7%	22%	42%	27%
care about the environment and take extra steps to travel in an environmentally responsible way	8%	29%	45%	14%
prioritize comfort and value for money over environmentally friendly 'green' practices	13%	6 27%	40%	16%
take the time to learn about local norms and standards prior to travelling to a destination to reduce my impact on the environment/historic sites	5%	22%	53%	16%
would like to have information about the sustainable management policies of hotels and guesthouses when booking accommodation	5% 10%	26%	45%	14%
would be willing to pay more for tourism destinations that have explicit components that are environmentally friendly (e.g., reduction of waste,	10%	33%	39%	14%
Strongly disagree			gree Strongly agree	
Sample S	Size: n=2	17		

January 24, 2025 Please indicate your level of agreement or disagreement with each of the following statements regarding sustainability and environmental practices while you are travelling. | Please indicate the extent to which you agree or disagree with the following statements about sustainability of culture and community.

Australia Couples Travelers: Sustainability and Travel Responsibility Statements

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Agreement Regarding Sustaining Local Culture While Traveling



Australia Nat Rep: Sustainability and Travel Responsibility Statements

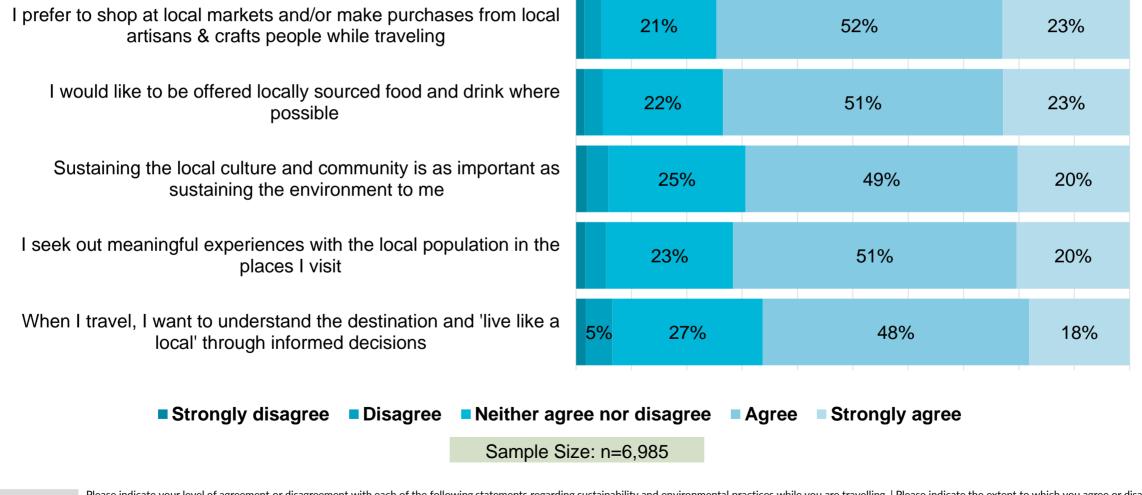
Agreement Regarding Sustainable Practices While Traveling

feel personal responsibility to take care of the places I visit		18%	÷	53%	22%	
practice 'leave no trace' when traveling to protect the environment	6%	24%		47%	20%	
care about the environment and take extra steps to travel in an environmentally responsible way	8%	29	9%	44%	15%	
prioritize comfort and value for money over environmentally friendly 'green' practices	10%	6 2	9%	42%	17%	
take the time to learn about local norms and standards prior to travelling to a destination to reduce my impact on the environment/historic sites	8%	26%	6	47%	16%	
would like to have information about the sustainable management policies of hotels and guesthouses when booking accommodation	7%	12%	29%	40%	12%	
would be willing to pay more for tourism destinations that have explicit components that are environmentally friendly (e.g., reduction of waste,	10%	16%	31%	32%	11%	
Strongly disagree Disagree Neither agree nor disagree Agree Strongly agree						
Sample Size: n=6,985						

January 24, 2025 Please indicate your level of agreement or disagreement with each of the following statements regarding sustainability and environmental practices while you are travelling. | Please indicate the extent to which you agree or disagree with the following statements about sustainability of culture and community.

Australia Nat Rep: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling

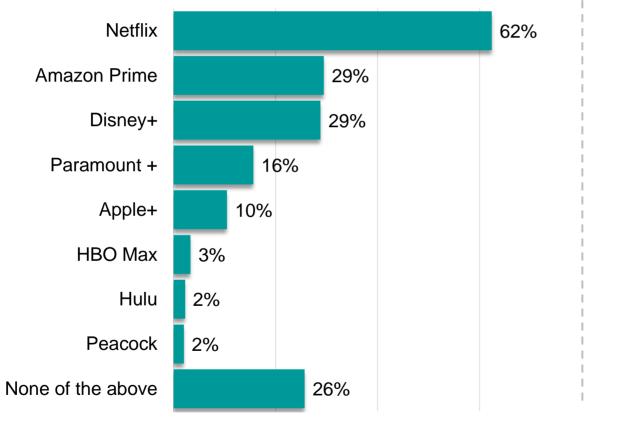


January 24, 2025

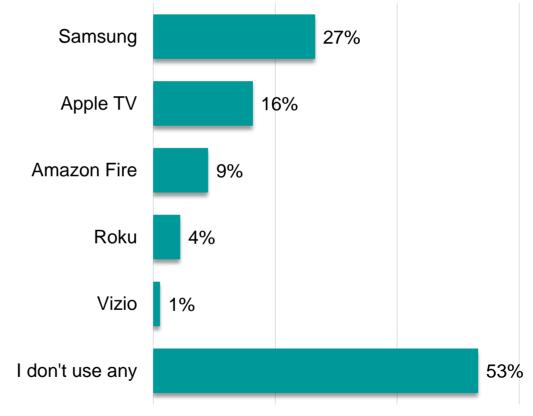
Please indicate your level of agreement or disagreement with each of the following statements regarding sustainability and environmental practices while you are travelling. | Please indicate the extent to which you agree or disagree with the following statements about sustainability of culture and community.

Australia Media Consumption

Streaming Platforms Used Weekly



Connected Device Used



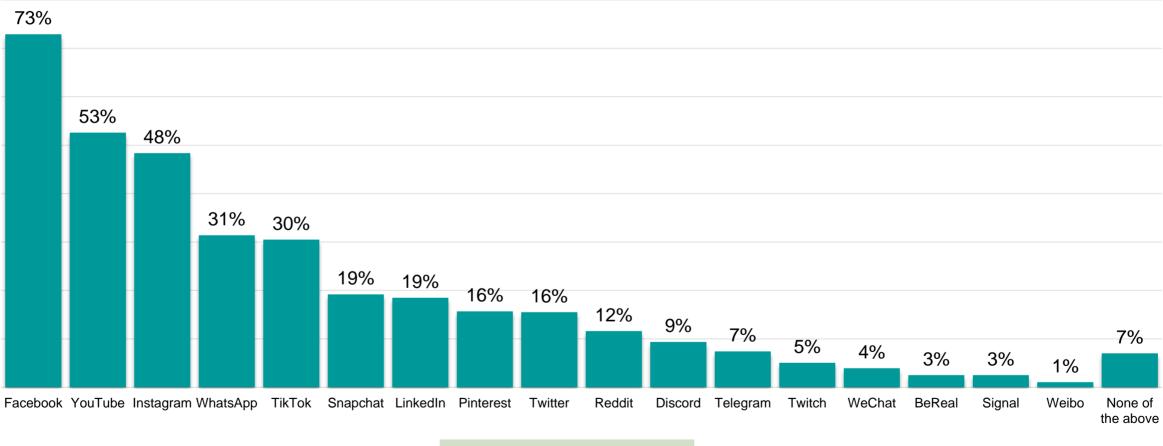
Sample Size: n=6,985

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**

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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**

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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%

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**