VISION INSIGHTS

Vision Insights Canada Traveler Profiles Q1 2025

May 1, 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., 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

Canada - Segment Definitions

Avid Traveler \$100k+

- Gross household income is \$100k+
- Age is 35-49
- Took an international trip in the last 12 months

Long-Distance Traveler

- Gross household income is \$100k+
- Age is 35-64
- Took an international trip by air in the last 12 months

Nationally Representative Sample (Nat Rep)

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

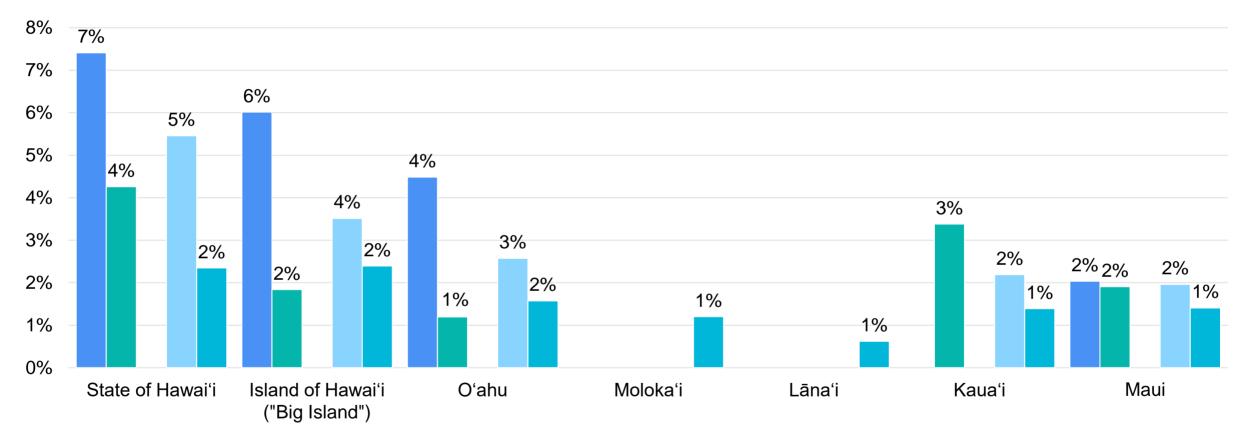
Older Avid Traveler \$100k+

- Gross household income is \$100k+
- Age is 50-64
- Took an international trip in the last 12 months

Senior Traveler \$100k+

- Gross household income is \$100k+
- Age is 64+
- Been to Hawai'i (ever)

Canada - Leisure Trip in Past 12 Months

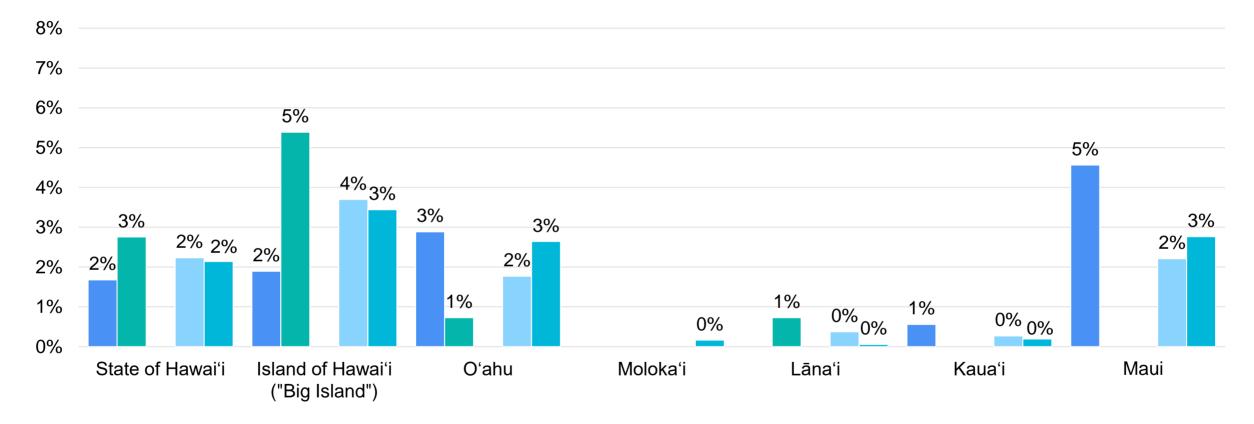


- Canada Avid Traveler \$100k+
- Canada Long Distance Air Traveler
- Canada Older Avid Traveler \$100k+
- Canada Senior Traveler \$100k+

Canada Nat Rep

Sample Min. n=50

Canada - Next Destination for Leisure Trip

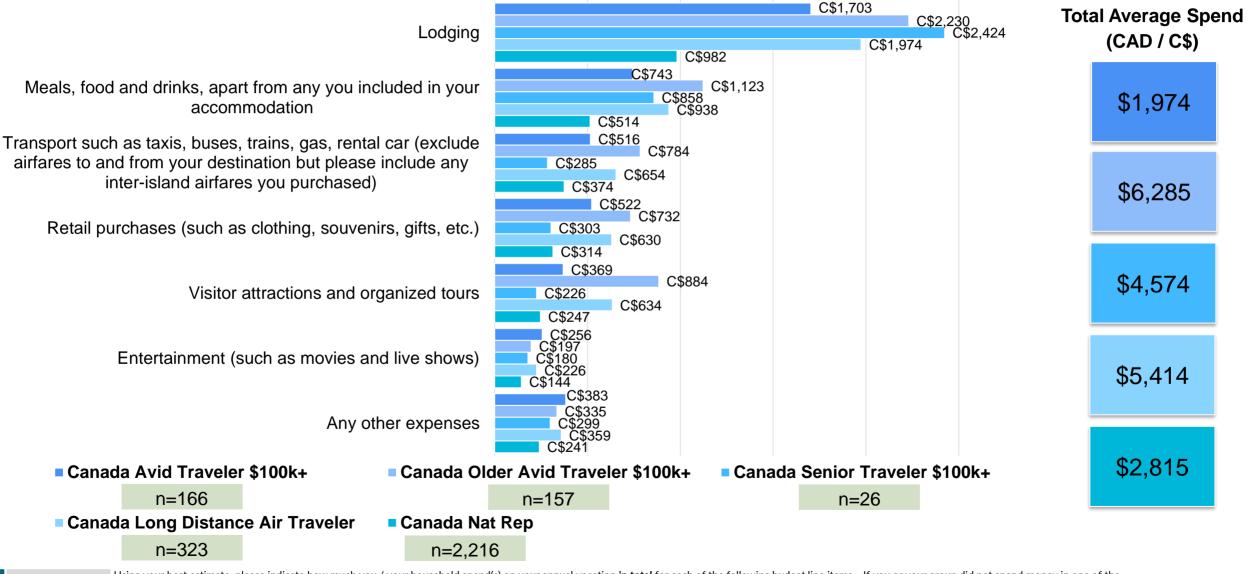


- Canada Avid Traveler \$100k+
- Canada Long Distance Air Traveler
- Canada Older Avid Traveler \$100k+
- Canada Senior Traveler \$100k+

Canada Nat Rep

Sample Min. n=75

Canada - Total Annual Holiday Spend



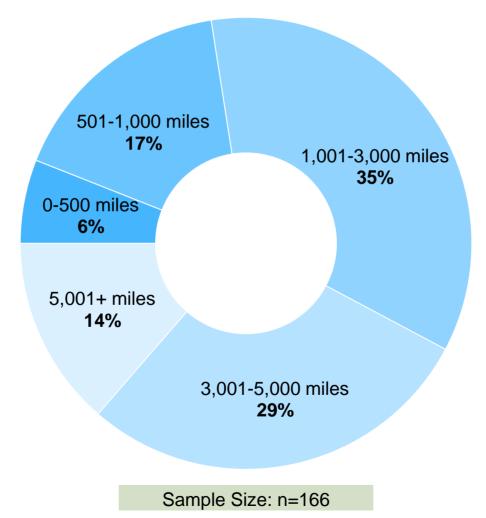
May 1, 2025

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.

Canada Avid Travelers \$100k+: Annual Vacation

May 1, 2025

Distance Travelled on Annual Vacation



Canada Avid Travelers \$100k+: Annual Vacation

Average Spend

Meals, food and drinks, apart from any you included in your accommodation

Transport such as taxis, buses, trains, gas, rental car (exclude airfares to and from your destination but please include any inter-...

Retail purchases (such as clothing, souvenirs, gifts, etc.)

Visitor attractions and organized tours

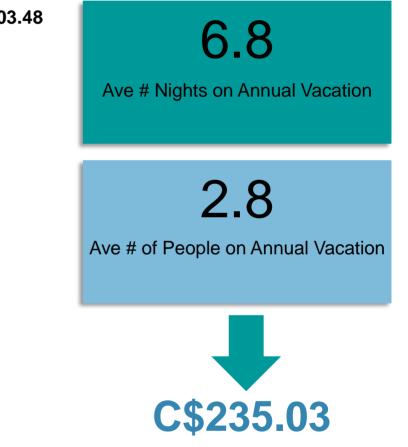
Entertainment (such as movies and live shows)

May 1, 2025

Any other expenses



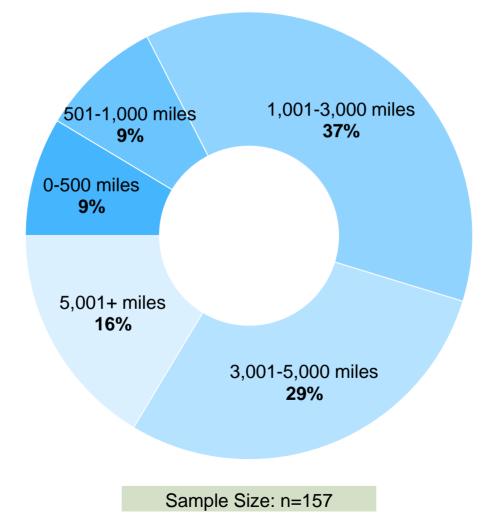
Spend Per Person Per Day



Ave. Per Person Per Day Spend

Canada Older Avid Travelers \$100k+: Annual Vacation

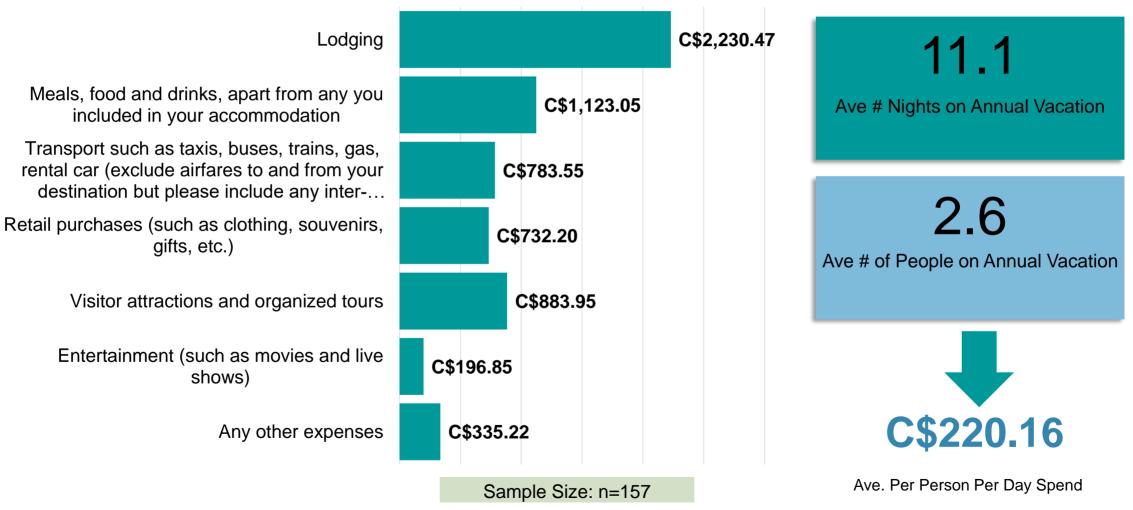
Distance Travelled on Annual Vacation



Canada Older Avid Travelers \$100k+: Annual Vacation

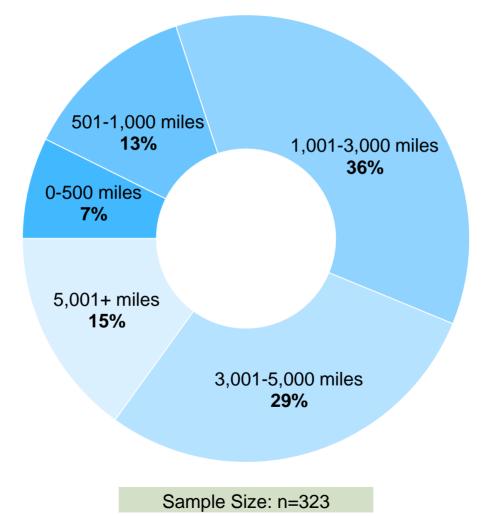
Average Spend

Spend Per Person Per Day



Canada Long-Distance Travelers: Annual Vacation

Distance Travelled on Annual Vacation



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.

May 1, 2025

Canada Long-Distance Travelers: Annual Vacation

Average Spend

May 1, 2025

Spend Per Person Per Day



Ave # Nights on Annual Vacation

 2.7

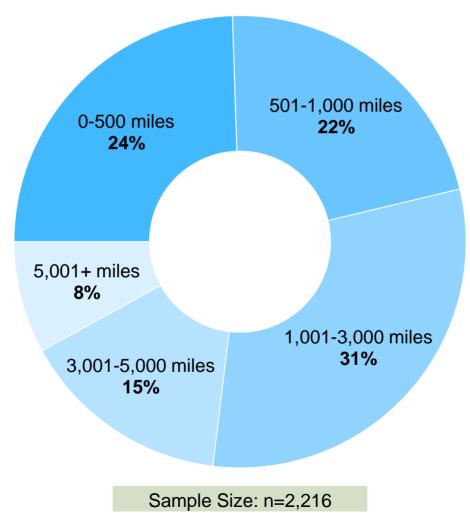
 Ave # of People on Annual Vacation



Canada Nat Rep: Annual Vacation

May 1, 2025

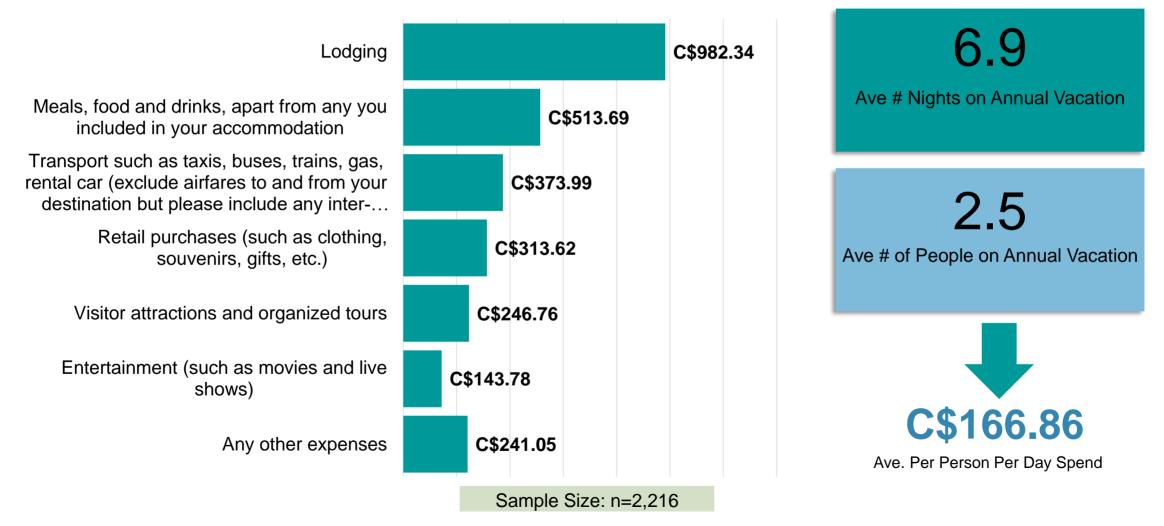
Distance Travelled on Annual Vacation



Canada Nat Rep: Annual Vacation

Average Spend

Spend Per Person Per Day



Canada - Importance of Travel Factors

		Ve	ery Important 5		
	Canada: Avid Traveler \$100k+	Canada: Older Avid Traveler \$100k+	Canada: Senior Traveler \$100k+	Canada: Long- Distance Air Traveler	Canada Market
Value for money	48%	52%	58%	50%	55%
Comfort and accessibility	49%	45%	39%	47%	46%
Natural attractions/activities	40%	32%	30%	36%	40%
Family friendly locations and activities	38%	23%	11%	30%	32%
Opportunity to experience local restaurants/businesses	40%	32%	38%	36%	35%
Cultural attractions	40%	33%	30%	36%	34%
Entertainment and nightlife	32%	13%	4%	22%	21%
Consideration of sustainable principles	26%	9%	4%	18%	22%
Safe and Secure Destination	57%	64%	54%	61%	61%
Sample Size:	n=166	n=157	n=26	n=323	n=2,216

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?

Canada Avid Travelers \$100k+: Importance of Travel Factors

ſ								1	
	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%	49%	40%	38%	40%	40%	32%	26%	57%
■ 4	35%	36%	39%	35%	36%	34%	29%	36%	27%
■3	15%	11%	16%	17%	17%	20%	24%	23%	12%
2	1%	4%	3%	8%	4%	3%	10%	7%	2%
Not very Important 1	0%	1%	2%	2%	4%	3%	5%	8%	1%

Not very Important 1

3

∎4

Very Important 5

Sample Size: n=166

2

Canada Older Avid Travelers \$100k+: Importance of Travel Factors

									_
							-		
ſ									
	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	52%	45%	32%	23%	32%	33%	13%	9%	64%
■ 4	37%	40%	47%	35%	38%	42%	17%	32%	26%
■3	9%	12%	15%	19%	23%	22%	34%	33%	7%
2	1%	2%	4%	13%	5%	1%	23%	14%	2%
Not very Important 1	1%	1%	2%	10%	2%	3%	13%	12%	1%

Not very Important 1

2 3 Very Important 5

Sample Size: n=157

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?

∎4

Canada 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	50%	47%	36%	30%	36%	36%	22%	18%	61%
■ 4	36%	38%	43%	35%	37%	38%	23%	34%	27%
■3	12%	11%	15%	18%	20%	21%	29%	28%	9%
2	1%	3%	4%	10%	4%	2%	16%	11%	2%
Not very Important 1	0%	1%	2%	6%	3%	3%	9%	10%	1%

Not very Important 1 2

May 1, 2025

3

∎4

Very Important 5

Canada 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	55%	46%	40%	32%	35%	34%	21%	22%	61%
■ 4	30%	35%	36%	28%	34%	33%	26%	28%	25%
■3	11%	15%	19%	23%	22%	24%	28%	32%	10%
2	2%	2%	3%	8%	5%	5%	12%	8%	2%
Not very Important 1	2%	2%	3%	10%	5%	4%	12%	9%	2%

Not very Important 1 2 3

∎4

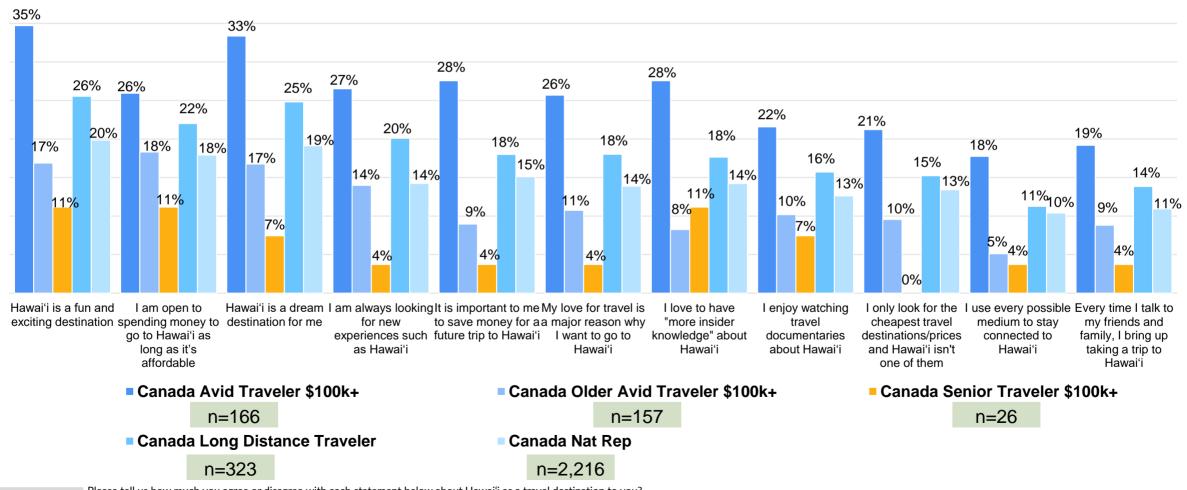
Very Important 5

Sample Size: n=2,216

Canada - 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?

Canada Avid Travelers \$100k+: Hawai'i as an Aspirational Destination

Agreement Regarding Hawai'i as an Aspirational Destination

ו	1	8%		43%		35%
e		20%		48%		26%
Э	8%	19%		39%		33%
i		20%		48%		27%
i	5%	20%		45%		28%
i	6%	20%	o	45%		26%
i		239	%	41%		28%
i	5%	27	%	44%		22%
ו	7%	14%	24%	3	4%	21%
i	6%	14%	28%		35%	18%
i	7%	16%	24%		34%	19%

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

Canada Older Avid Travelers \$100k+: Hawai'i as an Aspirational Destination

Agreement Regarding Hawai'i as an Aspirational Destination

	22%			54%			17	%
7%	10%	20%		44%	, D		18%	6
12%	11%	27%			33%		17	%
9%	7%	37%			33%	, D	14	4%
13%	17%		27%		3	4%		9%
12%	13%	289	%		369	%		11%
10%	12%	31%	6		38	3%		8%
8%	13%	28%			42%		-	10%
10%	18%		33%			29%		10%
2	:3%	22%		27%		22%		5%
2	2%	25%		24%		21%		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

Canada Long Distance Traveler: Hawai'i as an Aspirational Destination

Agreement Regarding Hawai'i as an Aspirational Destination

Hawai'i is a fun and exciting destination	20%		49%	26%
I am open to spending money to go to Hawai'i as long as it's affordable	<mark>5%</mark> 7%	20%	46%	22%
Hawai'i is a dream destination for me	7% 9%	23%	36%	25%
I am always looking for new experiences such as Hawai'i	6% 5%	28%	40%	20%
It is important to me to save money for a future trip to Hawai'i	8% 11%	23%	40%	18%
My love for travel is a major reason why I want to go to Hawai'i	8% 9%	24%	41%	18%
I love to have "more insider knowledge" about Hawaiʻi	7% 8%	28%	40%	18%
I enjoy watching travel documentaries about Hawai'i	<mark>5%</mark> 9%	27%	43%	16%
I only look for the cheapest travel destinations/prices and Hawai'i isn't one of them	9% 16%	6 299	<mark>%</mark> 31%	15%
I use every possible medium to stay connected to Hawai'i	15%	18%	28% 28	3% 11%
Every time I talk to my friends and family, I bring up taking a trip to Hawai'i	15%	20%	24% 27%	% 14%

Strongly disagree Disagree Neither agree nor disagree Agree Strongly agree

Canada Nat Rep: Hawai'i as an Aspirational Destination

Agreement Regarding Hawai'i as an Aspirational Destination

Ì		28	28%		46%			20)%	
•	8% 7	%	25%			42%		1	8%	
•	10%	10%	27	%		34%		19	9%	
	9%	9%	31	%		38%		14%		
i	12%	12%		29%		6	15%			
	11%	12%		31%		32	%		14%	
	9% 9	9%	32	.%		36%	, D		14%	
	9%	9%	3	3%	36%				13%	
	8%	13% 36		36%		3	30%		13%	
	17%	17% 18%			32%		23%		10%	
	20% 18%			28%		23%		11%		

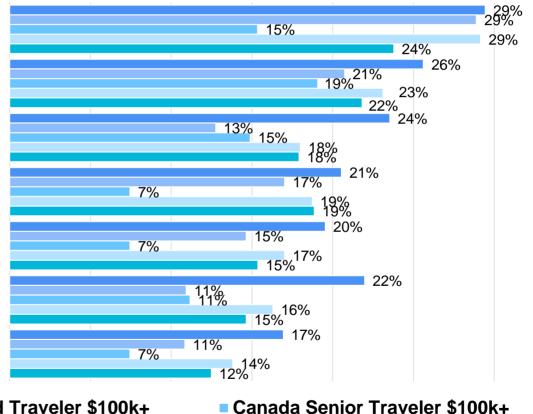
Hawai'i is a fun and exciting destination I am open to spending money to go to Hawai'i as long as it's affordable Hawai'i is a dream destination for me I am always looking for new experiences such as Hawai'i It is important to me to save money for a future trip to Hawai'i My love for travel is a major 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

Sample Size: n=2,216

May 1, 2025

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



n=26

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...

Canada Avid Traveler \$100k+

n=166

Canada Long Distance Traveler

n=323

Canada Older Avid Traveler \$100k+
 n=157
 Canada Nat Rep

n=2,216

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

I prefer to shop at local markets and/or make purchases from local artisans & crafts people while traveling

I would like to be offered locally sourced food and drink where possible

Sustaining the local culture and community is as important as sustaining the environment to me

I seek out meaningful experiences with the local population in the places I visit

When I travel. I want to understand the destination and 'live like a local' through informed decisions

Canada Avid Traveler \$100k+ n=166

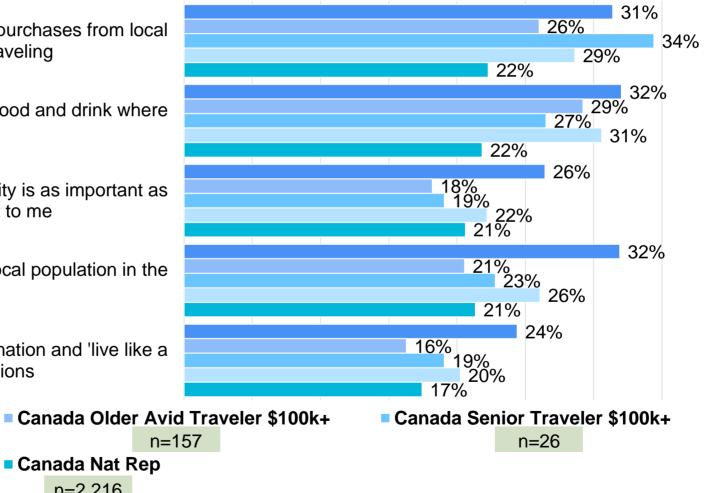
Canada Long Distance Traveler

n=323

May 1, 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.

n=2.216



Canada Avid Travelers \$100k+: 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 questhouses 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,...

5%	19%	46%	29%
5%	17%	50%	26%
	22%	48%	24%
7%	26%	43%	21%
5%	16%	56%	20%
5%	24%	45%	22%
6% 9	9% 20	<mark>%</mark> 49%	17%

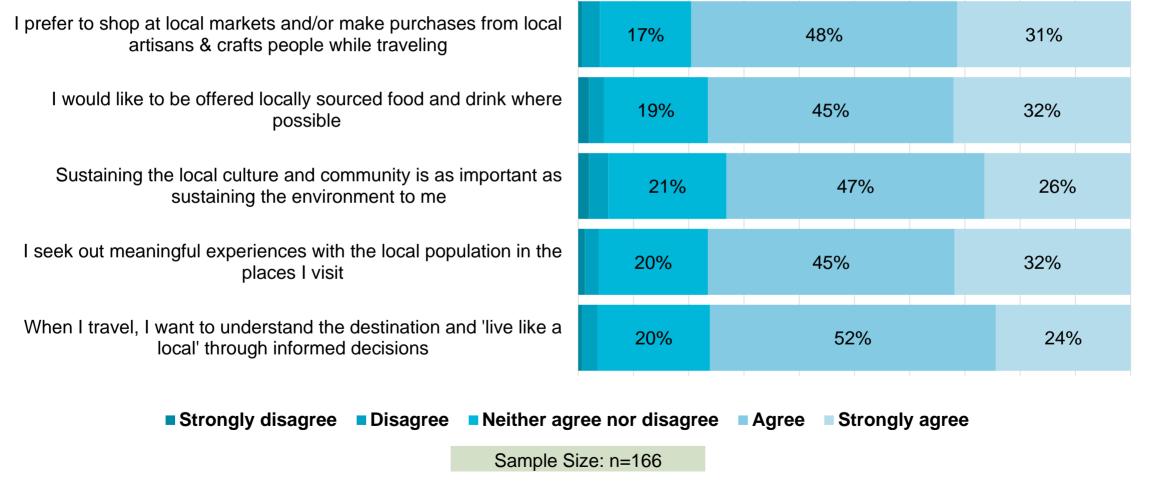
Strongly disagree Disagree Neither agree nor disagree Agree Strongly agree

Sample Size: n=166

Canada Avid Travelers \$100k+: Sustainability and Travel Responsibility Statements

28

Agreement Regarding Sustaining Local Culture While Traveling



Canada Older Avid Travelers \$100k+: Sustainability and Travel Responsibility Statements

29

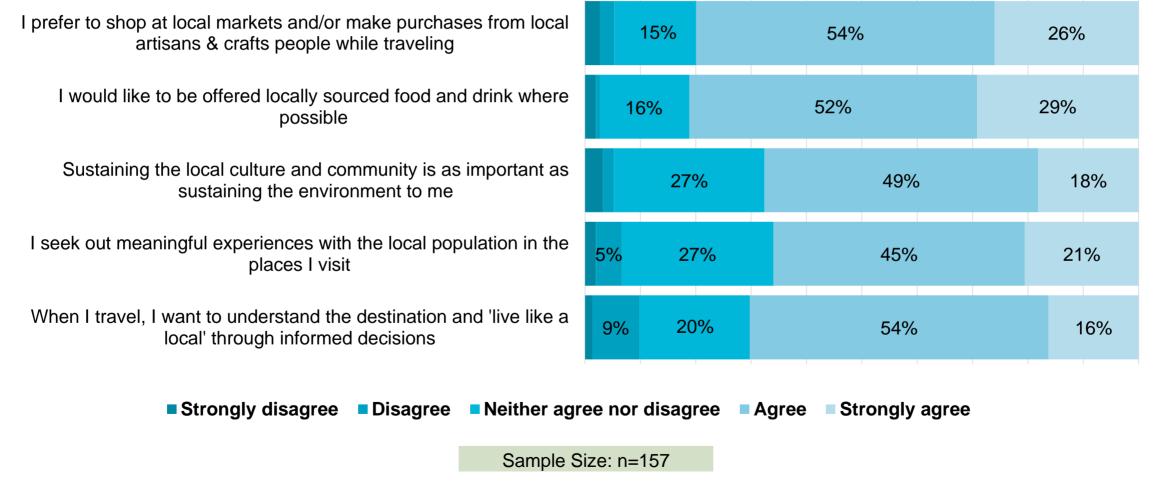
Agreement Regarding Sustainable Practices While Traveling

feel personal responsibility to take care of the places I visit		159	%			50%			29%	6
practice 'leave no trace' when traveling to protect the environment	8% 24%				46%		2	21%		
care about the environment and take extra steps to travel in an environmentally responsible way	7%		28%			48%		8%		13%
prioritize comfort and value for money over environmentally friendly 'green' practices	1	0%		27%			43	%		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	5%	8%	2	20%			52%	0		15%
would like to have information about the sustainable management policies of hotels and guesthouses when booking accommodation	9%	5 14	4%		25%			41%		11%
would be willing to pay more for tourism destinations that have explicit components that are environmentally friendly (e.g., reduction of waste,	13	3%		23%		20%		34%		11%
Strongly disagree Disagree Neither ag Sample S			-	ree 🗖	Agree	e ∎St	rongly	agree		

Canada Older Avid Travelers \$100k+: Sustainability and Travel Responsibility Statements

30

Agreement Regarding Sustaining Local Culture While Traveling



Canada Long Distance Travelers: Sustainability and Travel Responsibility Statements

31

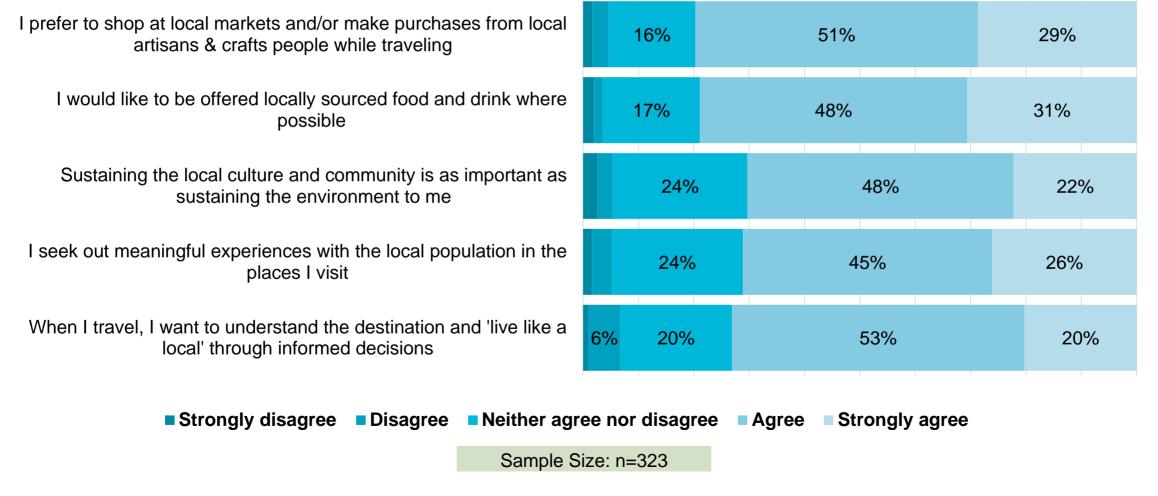
Agreement Regarding Sustainable Practices While Traveling

feel personal responsibility to take care of the places I visit	17%			48%		29%
practice 'leave no trace' when traveling to protect the environment	7%	6 21%	,)	48%		23%
care about the environment and take extra steps to travel in an environmentally responsible way	5	<mark>%</mark> 25	%	48%		18%
prioritize comfort and value for money over environmentally friendly 'green' practices	9	9%	27%	43%		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	5% 7	7% 18	%	54%		17%
would like to have information about the sustainable management policies of hotels and guesthouses when booking accommodation	6%	10%	25%	43%		16%
would be willing to pay more for tourism destinations that have explicit components that are environmentally friendly (e.g., reduction of waste,	9%	6 16%	20%	41%		14%
Strongly disagree Disagree Neither ag	ree	nor disag	ree Agre	e Strongly agree		
Sample	Size:	n=323				

Canada Long Distance Travelers: Sustainability and Travel Responsibility Statements

32

Agreement Regarding Sustaining Local Culture While Traveling



Canada Nat Rep: Sustainability and Travel Responsibility Statements

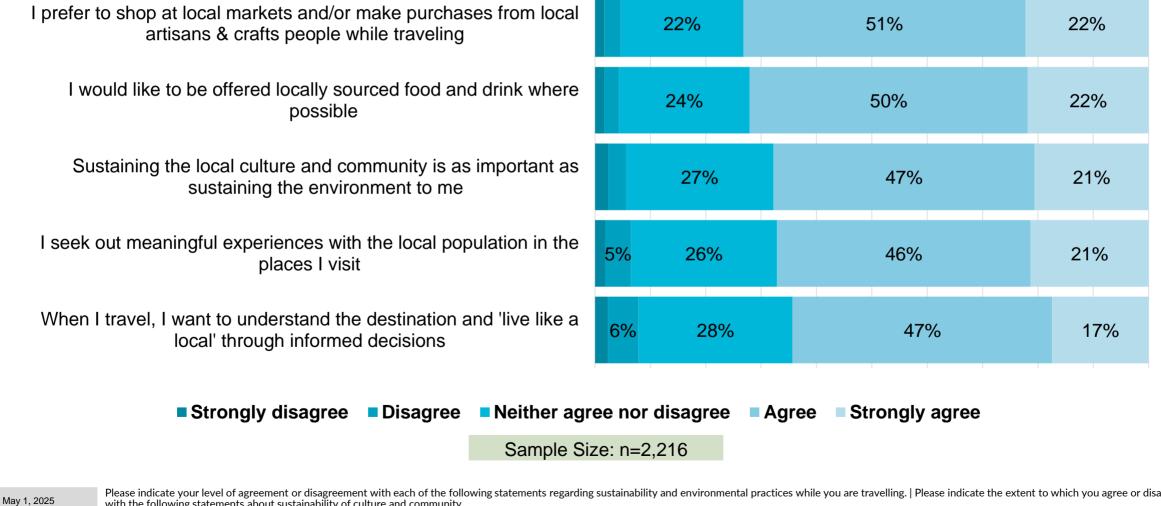
Agreement Regarding Sustainable Practices While Traveling

feel personal responsibility to take care of the places I visit		21%	49%		24%
practice 'leave no trace' when traveling to protect the environment	5%	23%	47	%	22%
care about the environment and take extra steps to travel in an environmentally responsible way	6%	28%		44%	18%
prioritize comfort and value for money over environmentally friendly 'green' practices	11%	28%	%	39%	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	5% 7%	27%		46%	15%
would like to have information about the sustainable management policies of hotels and guesthouses when booking accommodation	7% 99	% 29	9%	40%	15%
would be willing to pay more for tourism destinations that have explicit components that are environmentally friendly (e.g., reduction of waste,	9%	15%	31%	32%	12%
Strongly disagree Disagree Neither ag	ree nor	disagree	Agree Stror	ngly agree	
Sample Size: n=2,216					

33 May 1, 2025

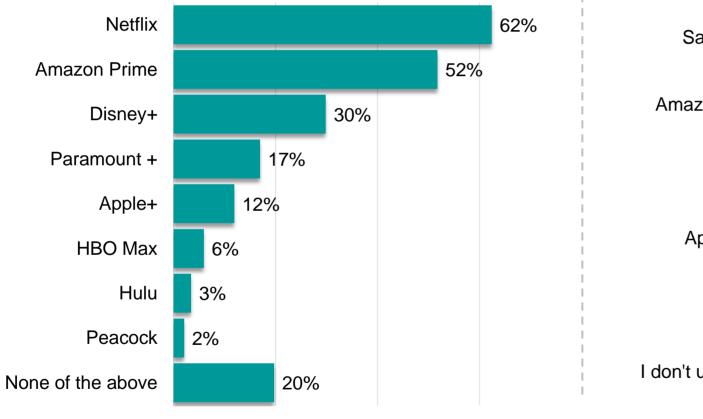
Canada Nat Rep: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling

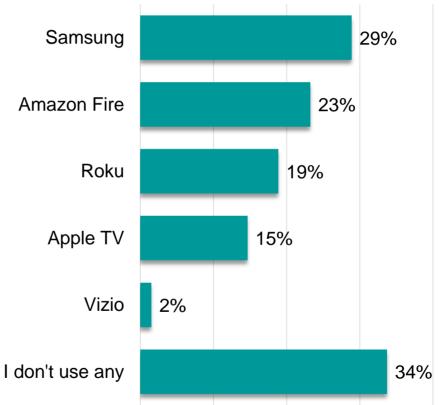


Canada Media Consumption

Streaming Platforms Used Weekly



Connected Device Used



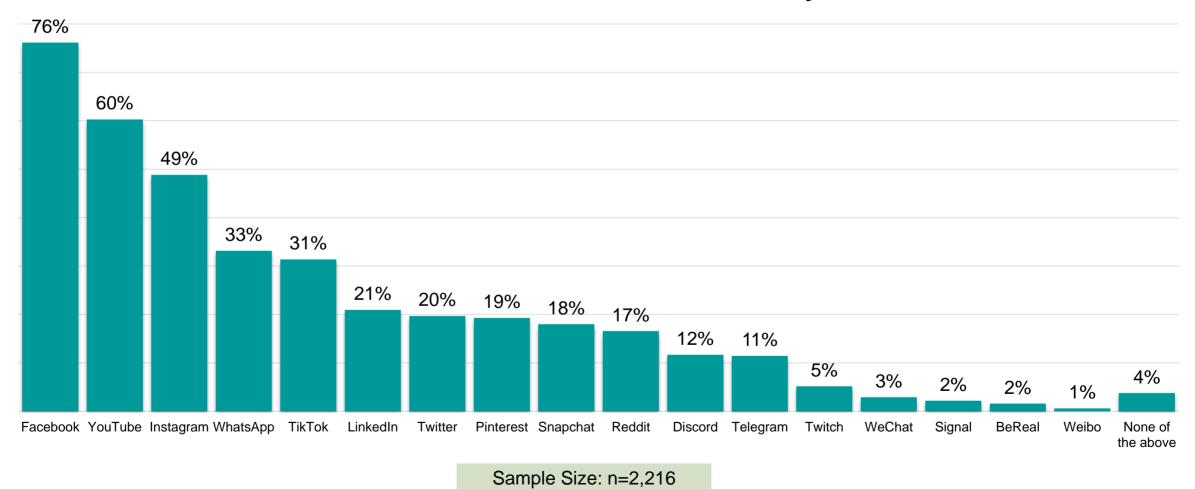
Sample Size: n=2,216

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**

35 May 1, 2025

Canada Media Consumption

Social Media Platforms Used Weekly



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**

Canada Media Consumption

Travel Destination Source of Awareness

20%
33%
7%
26%
10%
48%
37%
33%
8%
15%
13%

Actions Taken After Seeing an Ad for a Destination

I go to the destination's website	32%
I search for information about the destination online	43%
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	10%
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**