



# **Vision Insights Australia Traveler Profiles H1 2025 (January 1 – June 30, 2025)**

July 23, 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

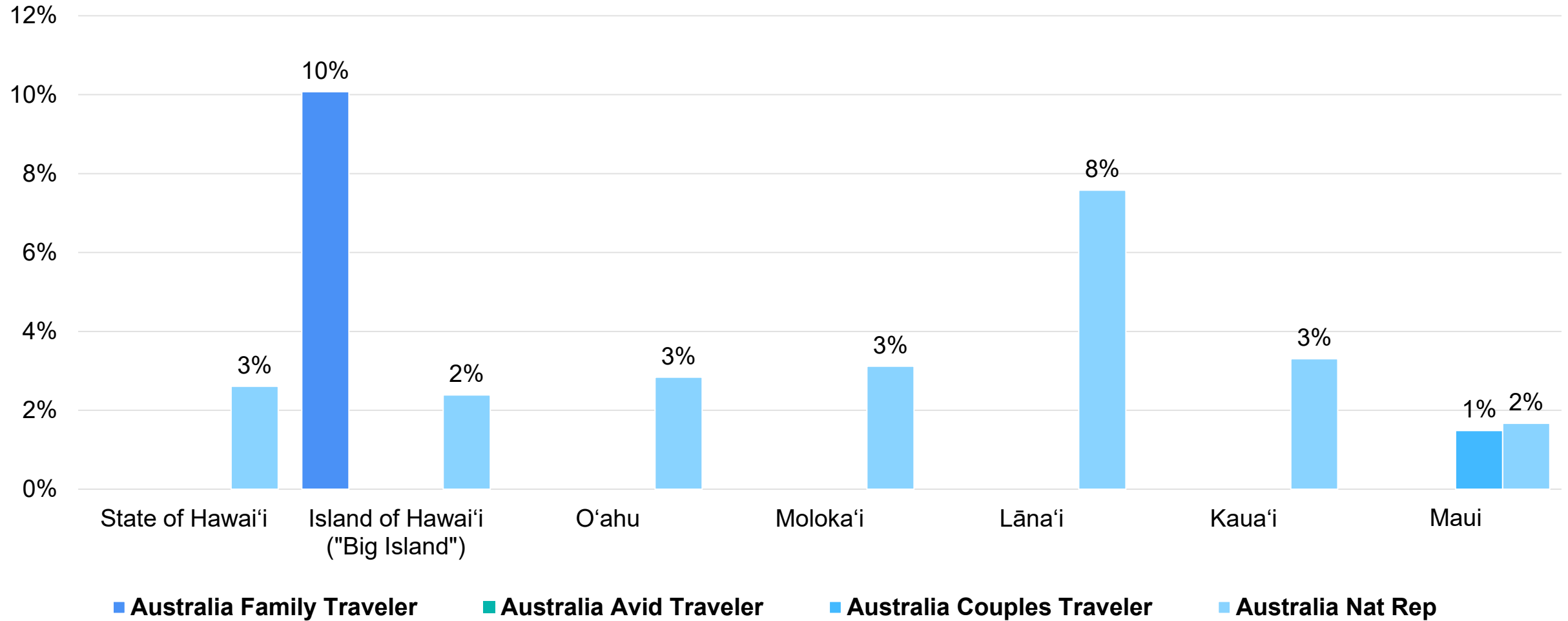
## Couples Traveler

- 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)

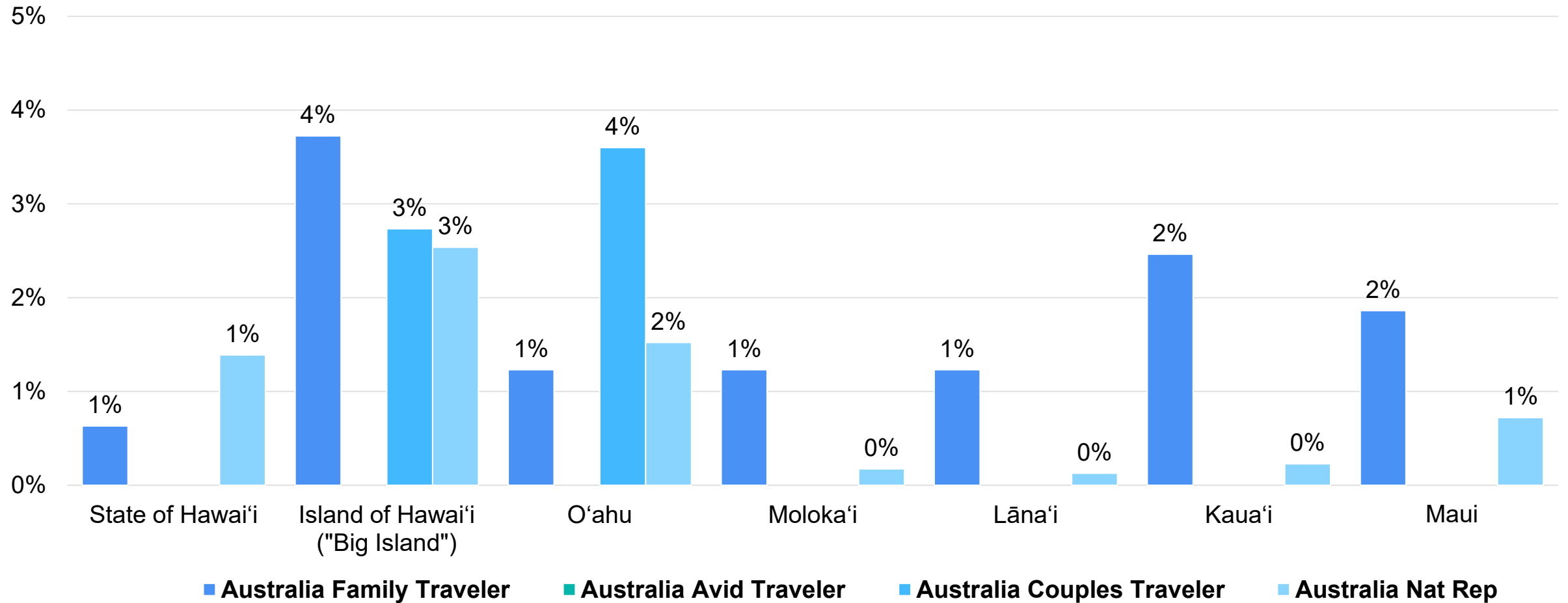
- Representative of Australia adults in terms of age, gender, social class and education

# Australia - Leisure Trip in Past 12 Months



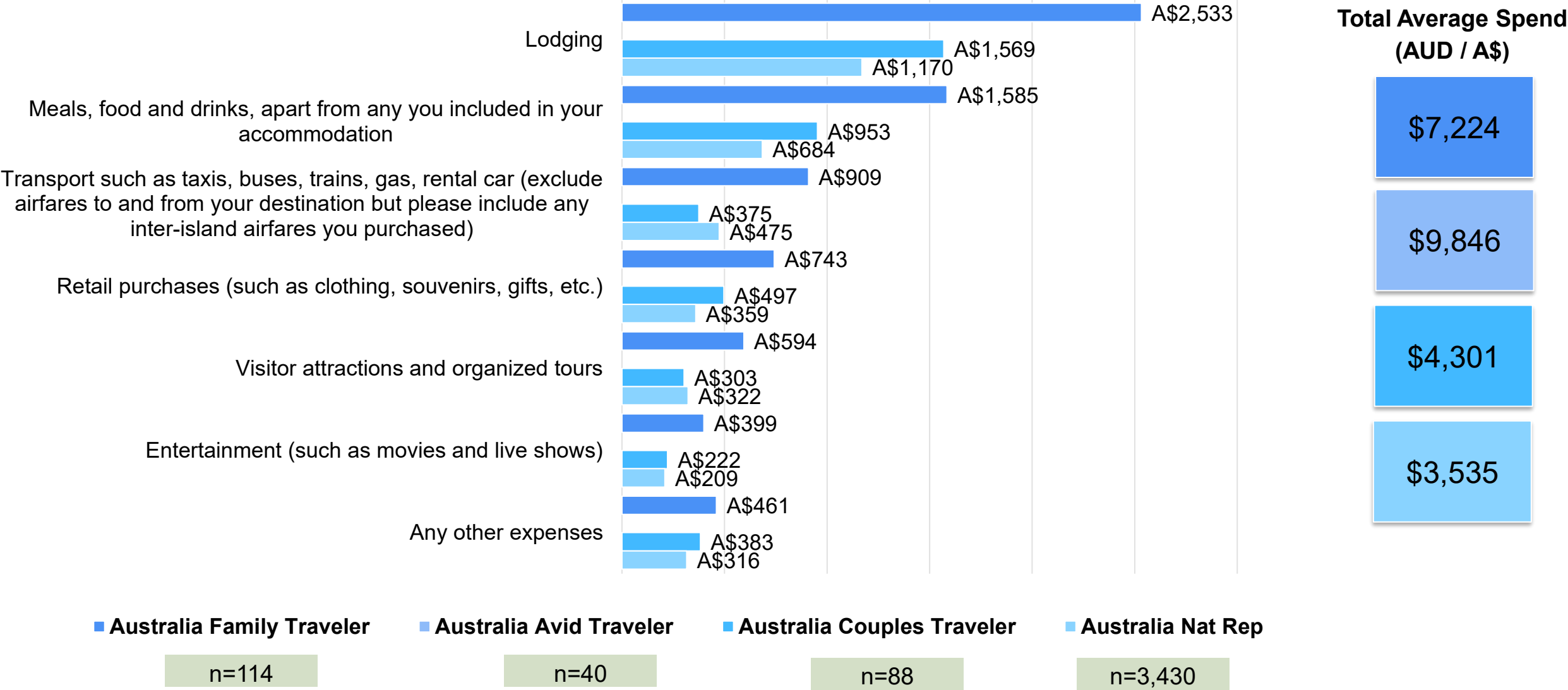
Sample Min. n=50

# Australia - Next Destination for Leisure Trip



Sample Min. n=50

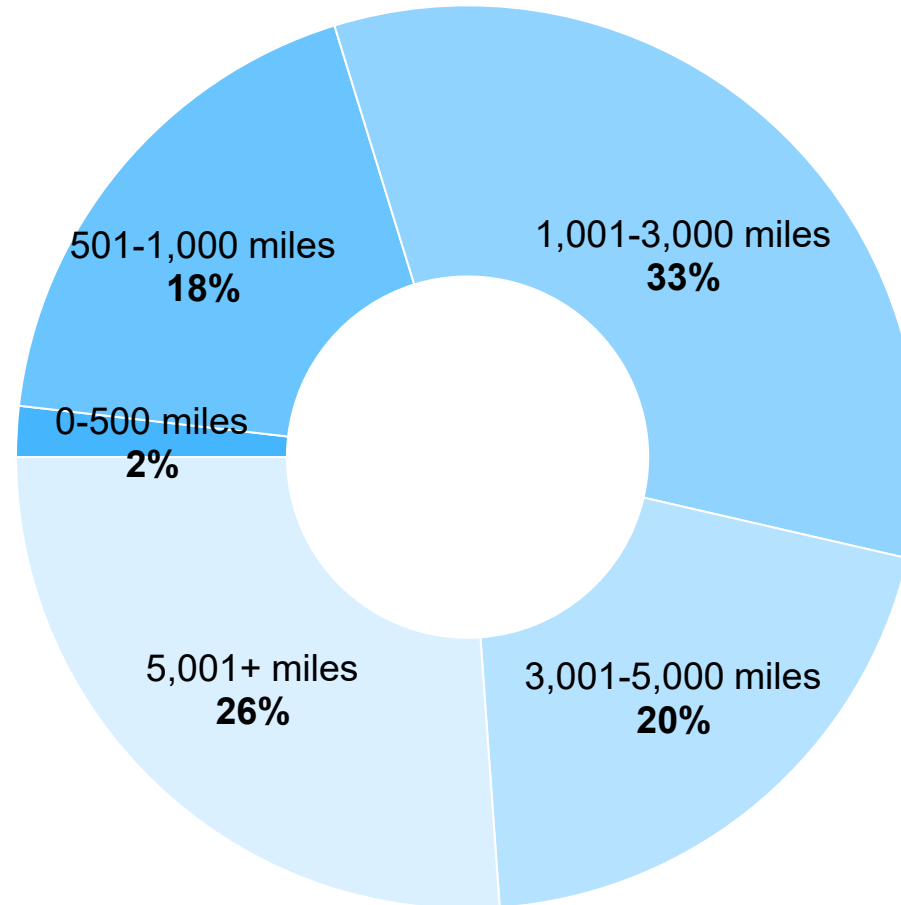
# Australia - Total Annual Holiday Spend



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

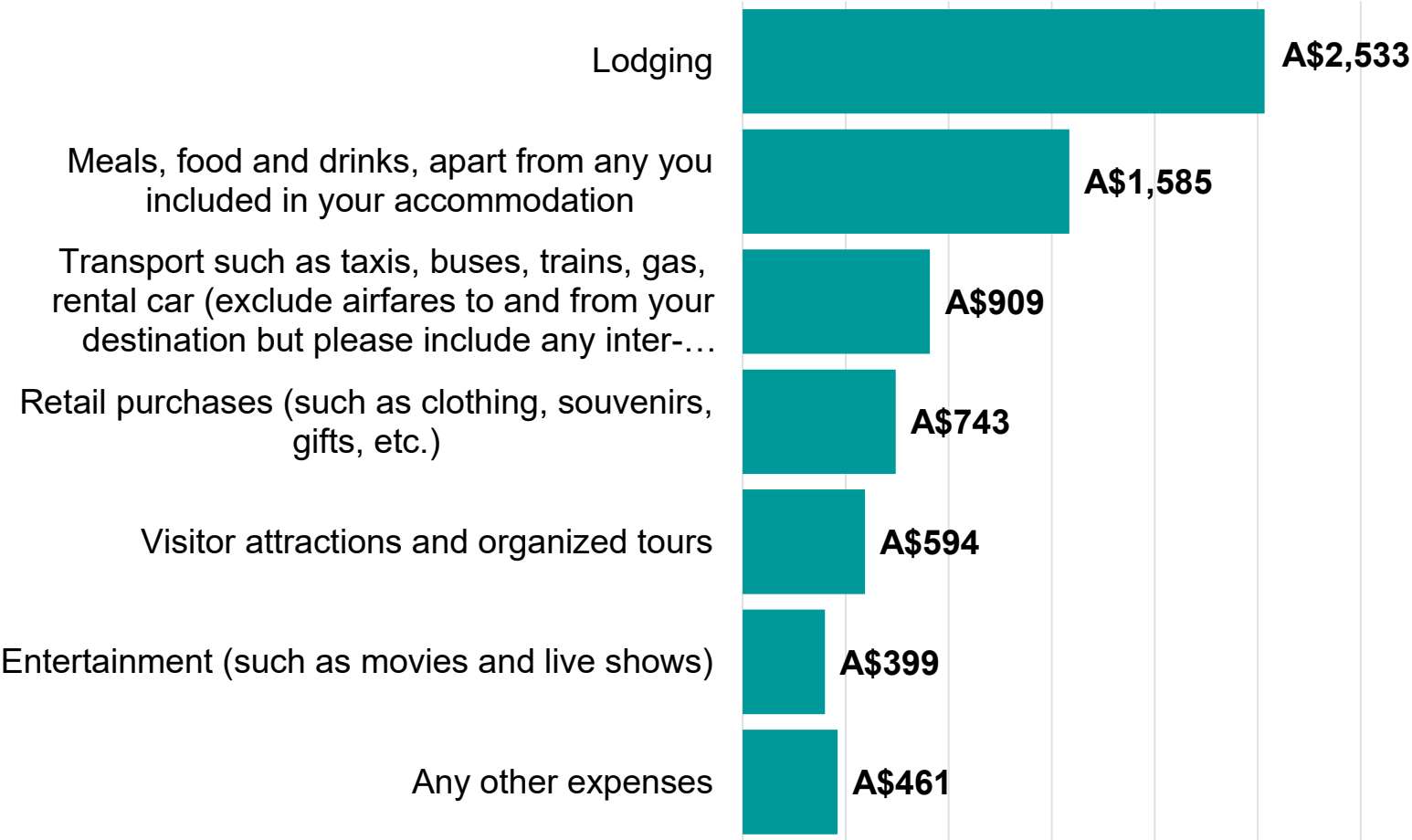
## Distance Travelled on Annual Vacation



Sample Size: n=114

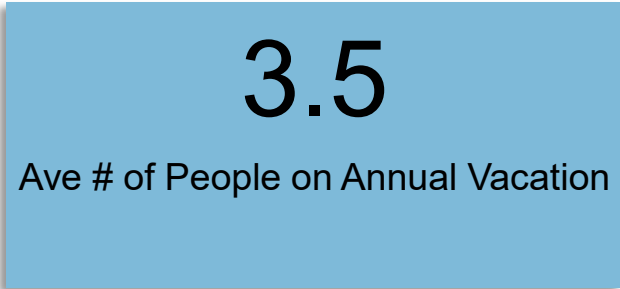
# Australia Family Travelers: Annual Vacation

## Average Spend



Sample Size: n=114

## Spend Per Person Per Day



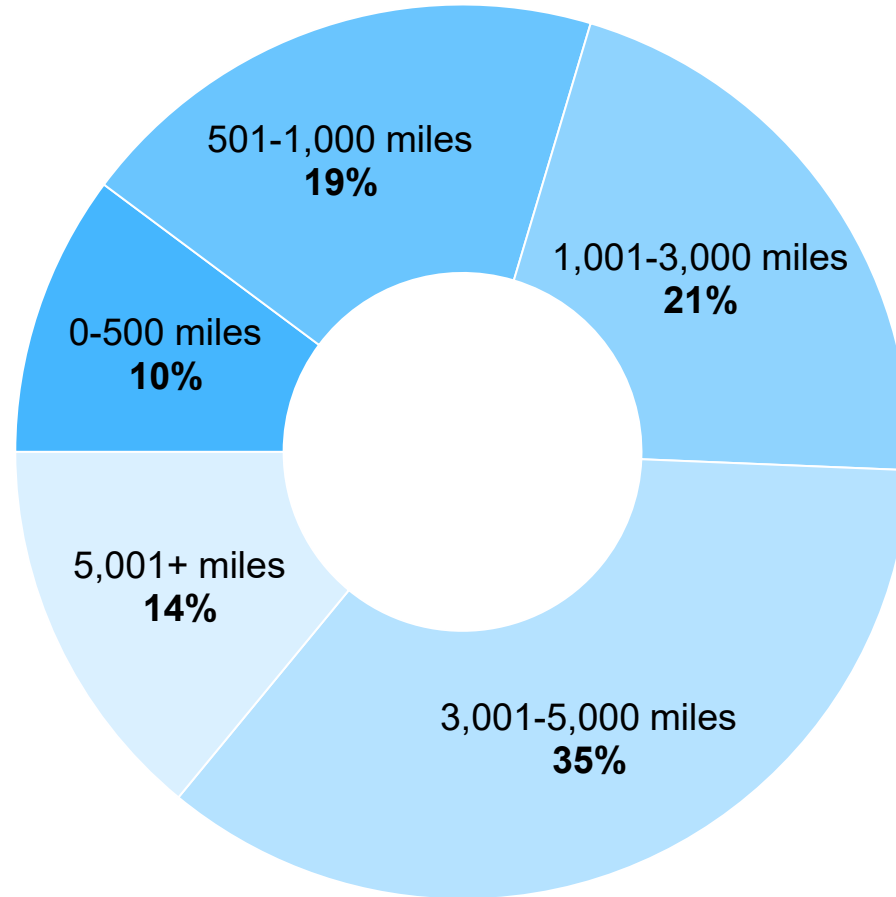
A\$216.68

Ave. Per Person Per Day Spend



# Australia Couples Travelers: Annual Vacation

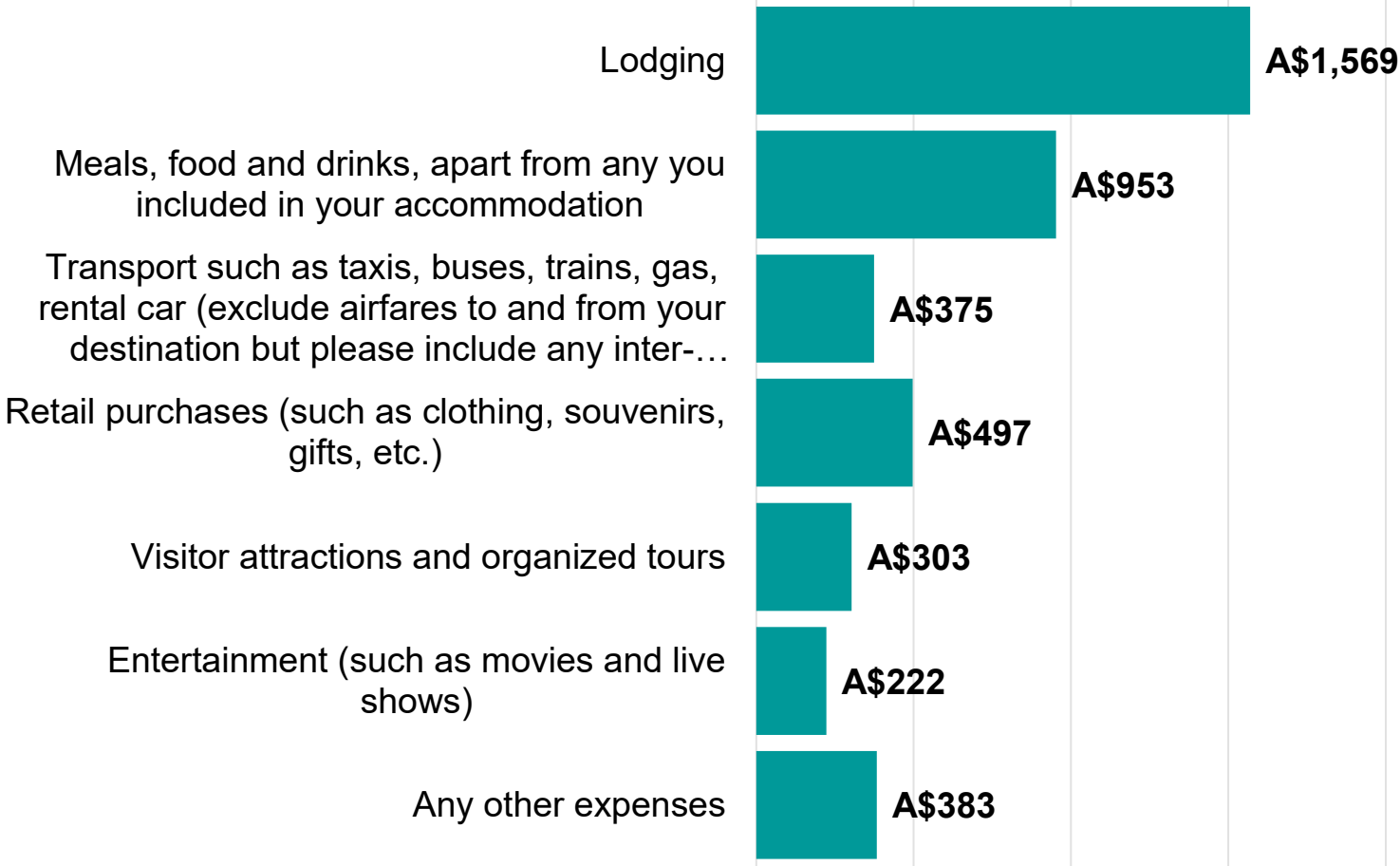
## Distance Travelled on Annual Vacation



Sample Size: n=88

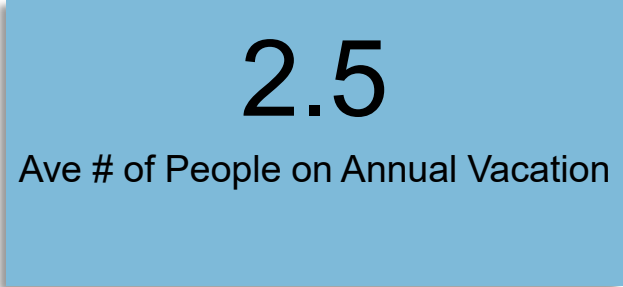
# Australia Couples Travelers: Annual Vacation

## Average Spend



Sample Size: n=88

## Spend Per Person Per Day

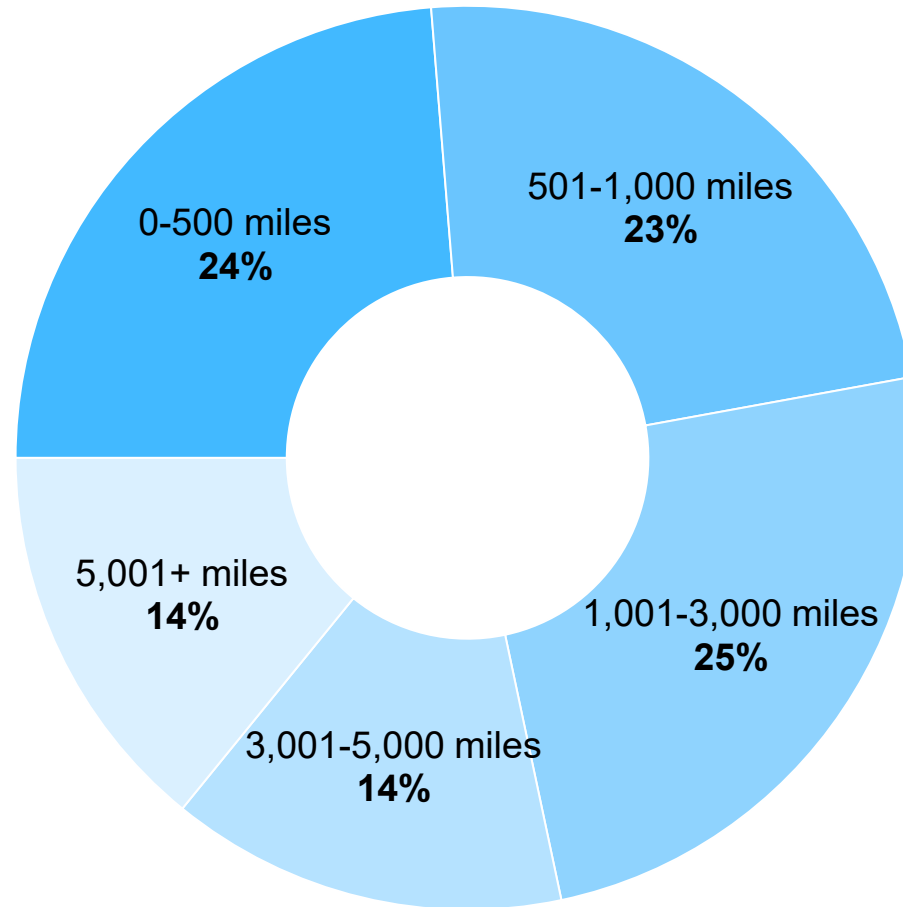


**A\$208.80**

Ave. Per Person Per Day Spend

# Australia Nat Rep: Annual Vacation

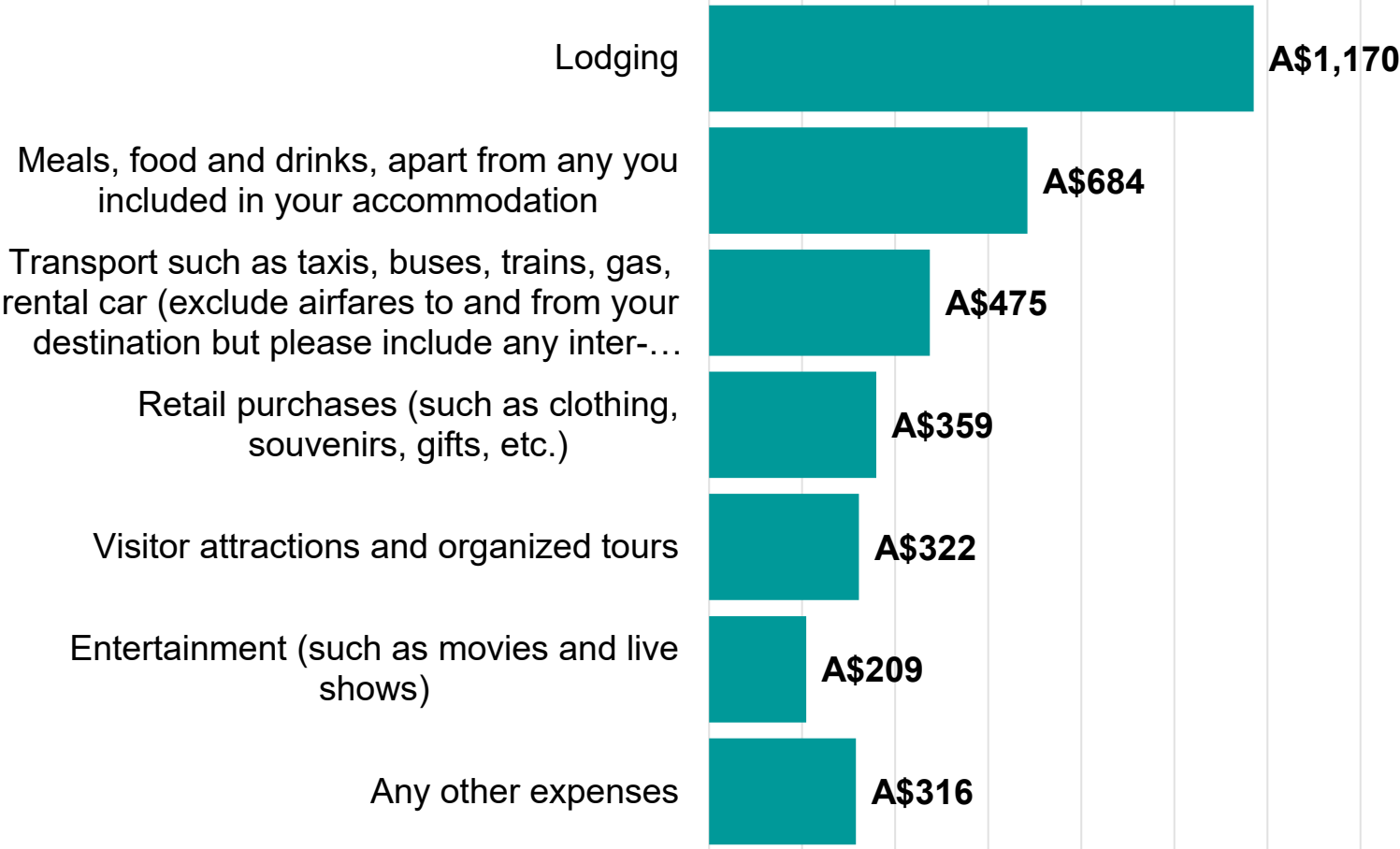
## Distance Travelled on Annual Vacation



Sample Size: n=3,430

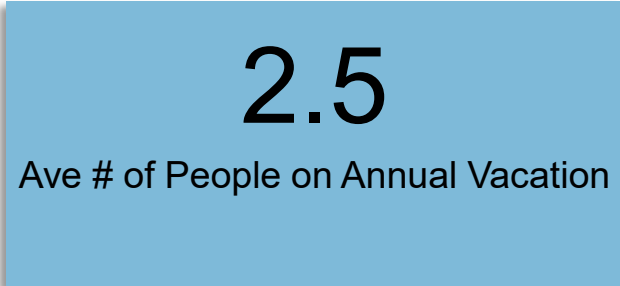
# Australia Nat Rep: Annual Vacation

## Average Spend



Sample Size: n=3,430

## Spend Per Person Per Day



**A\$167.81**  
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	49%	53%	50%	53%
Comfort and accessibility	41%	45%	47%	42%
Natural attractions/activities	45%	52%	43%	40%
Family friendly locations and activities	45%	35%	27%	32%
Opportunity to experience local restaurants/businesses	35%	41%	38%	33%
Cultural attractions	41%	44%	36%	32%
Entertainment and nightlife	27%	40%	20%	18%
Consideration of sustainable principles	26%	23%	20%	18%
Safe and secure destination	56%	61%	61%	58%

Sample Size:

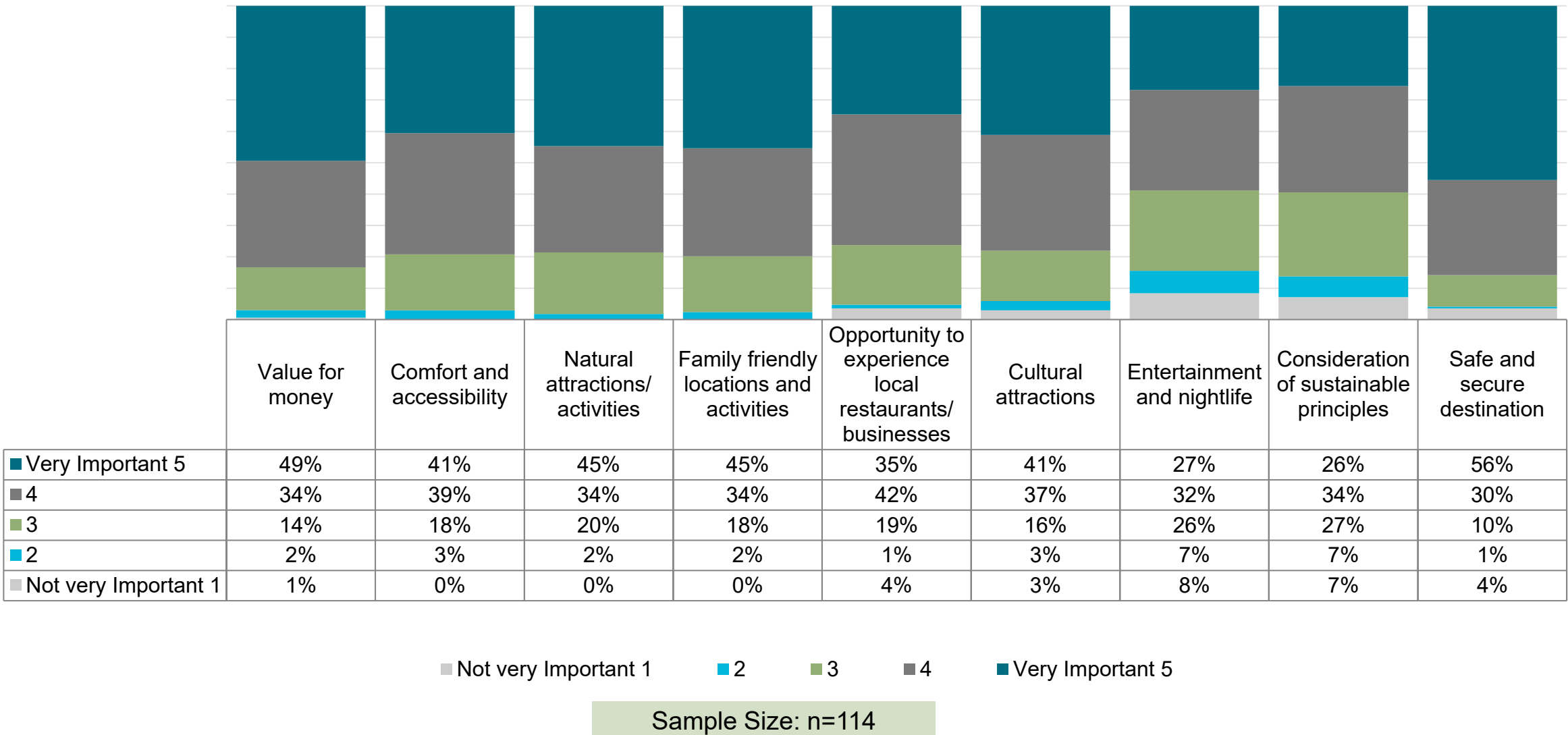
n=114

n=40

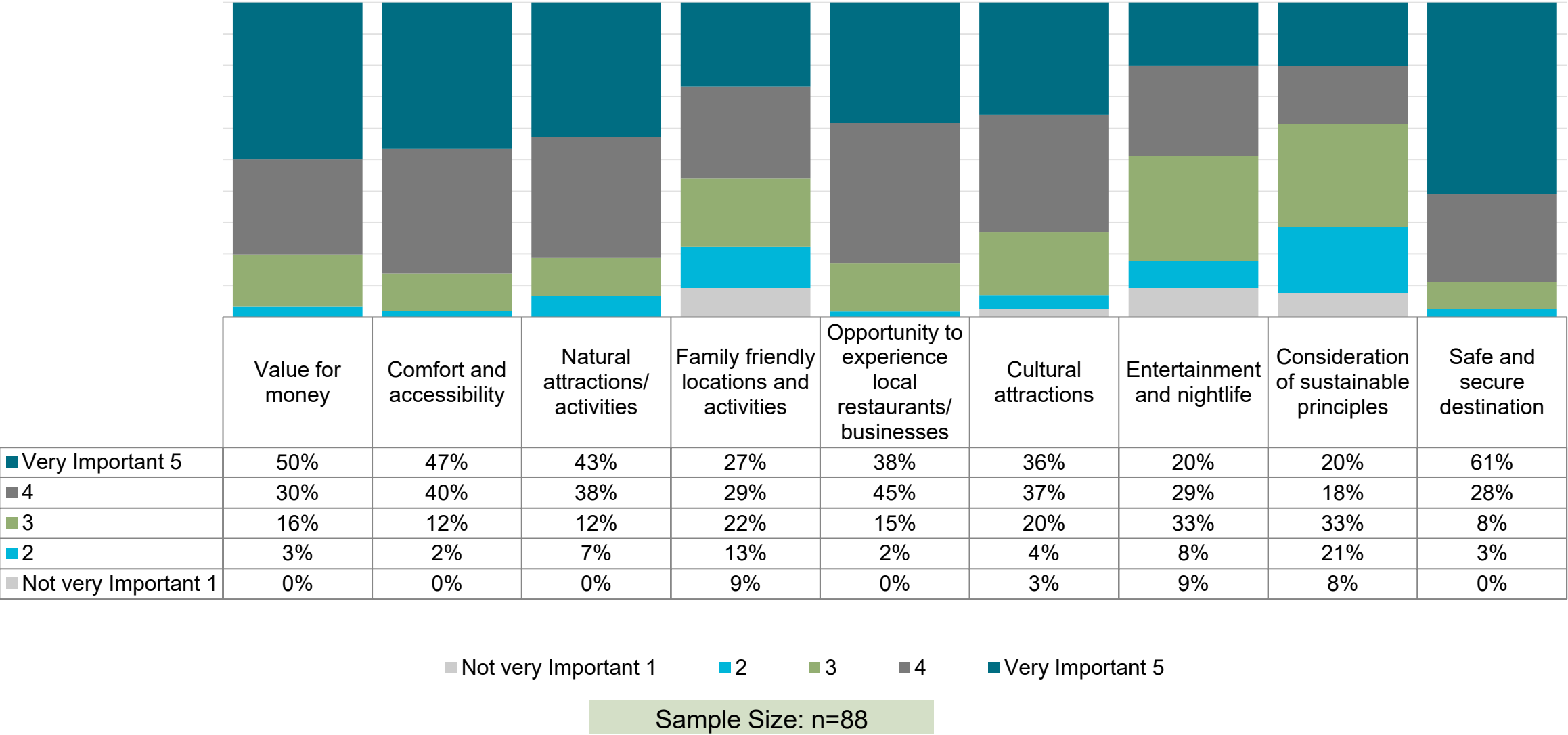
n=88

n=3,430

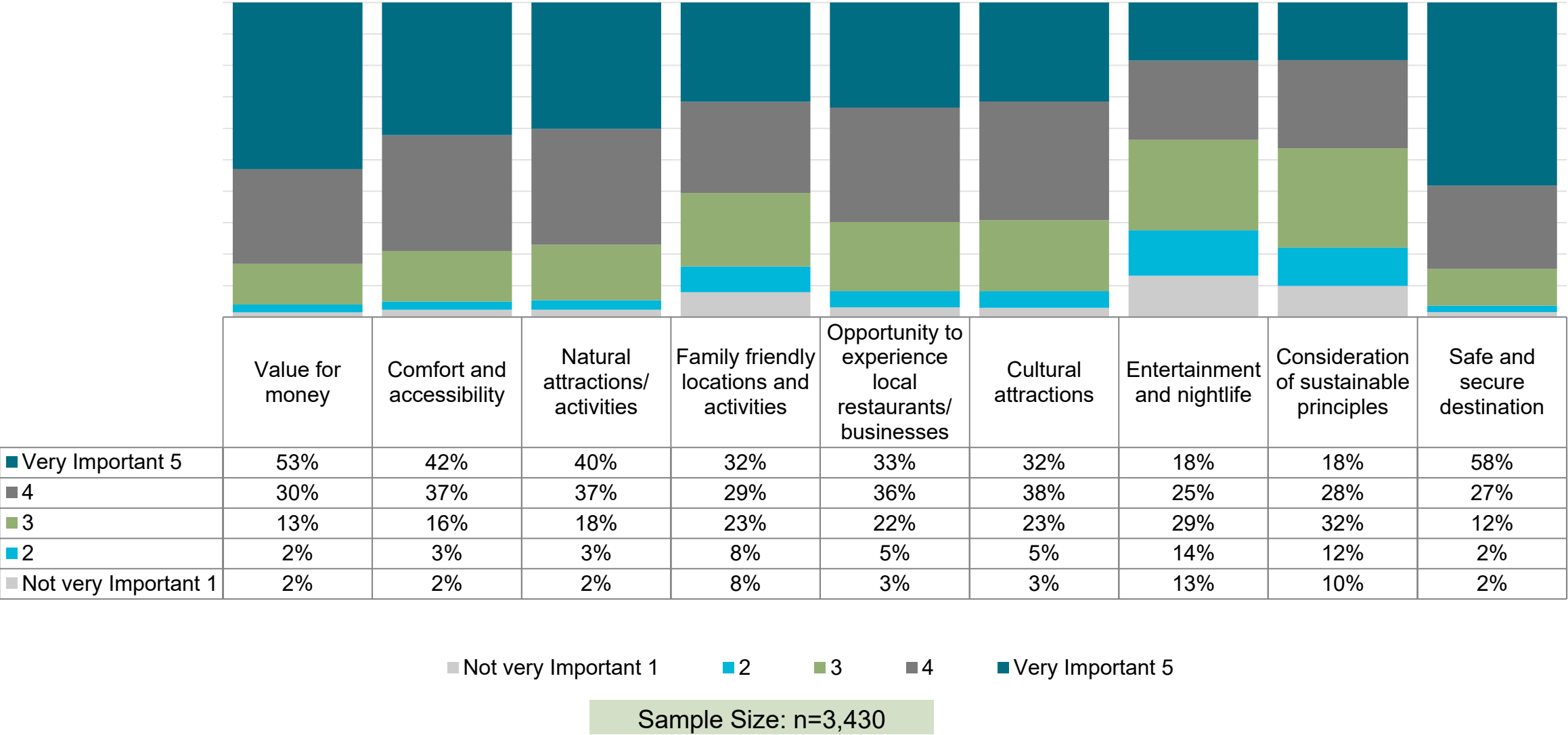
# Australia Family Travelers: Importance of Travel Factors



# Australia Couples Travelers: Importance of Travel Factors



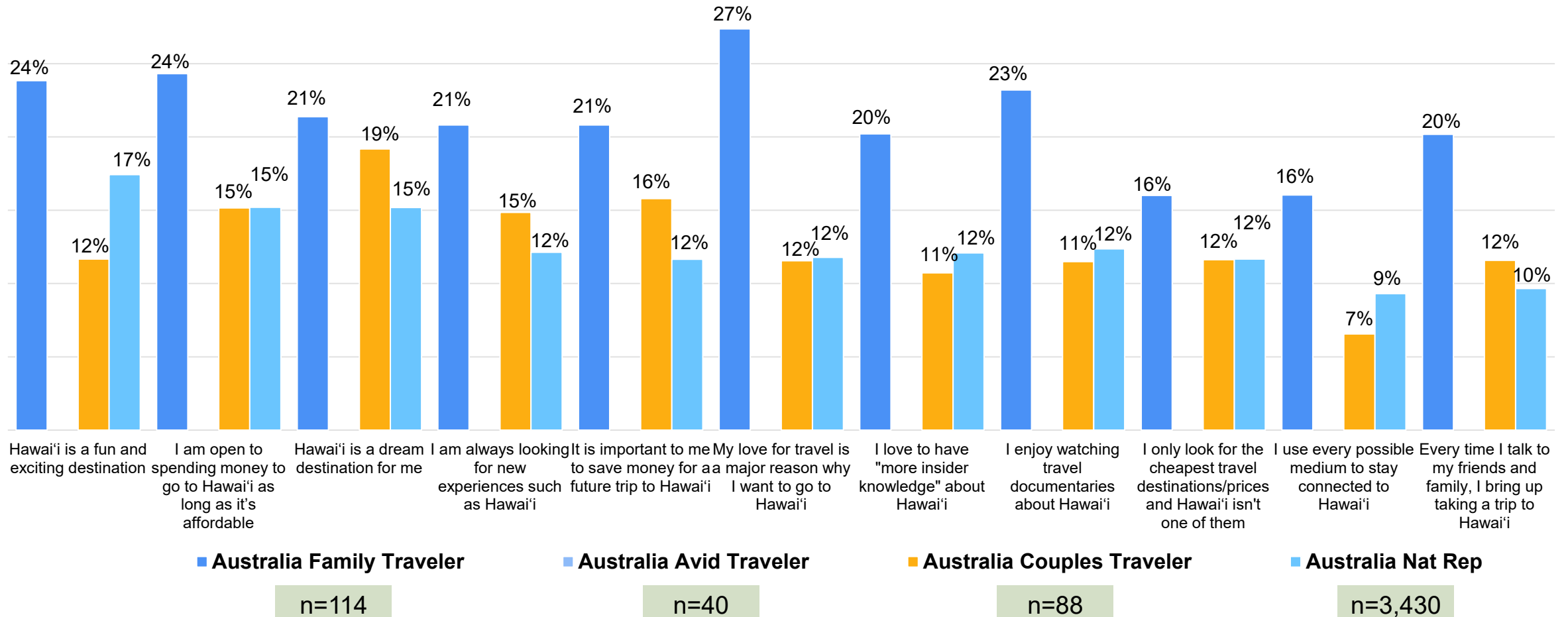
# Australia Nat Rep: Importance of Travel Factors





# Australia - Hawai'i as an Aspirational Destination

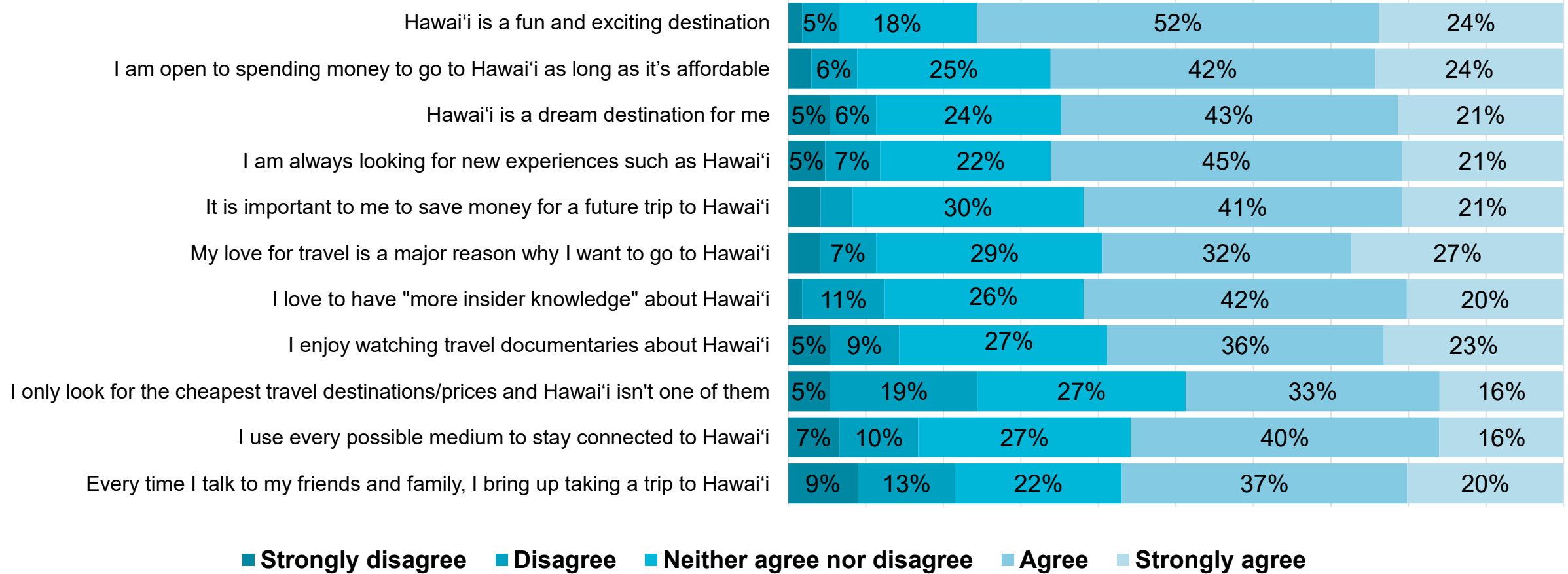
## Agreement Regarding Hawai'i as a Travel Destination (Strongly Agree)



Please tell us how much you agree or disagree with each statement below about Hawai'i as a travel destination to you?

# Australia Family Travelers: Hawai'i as an Aspirational Destination

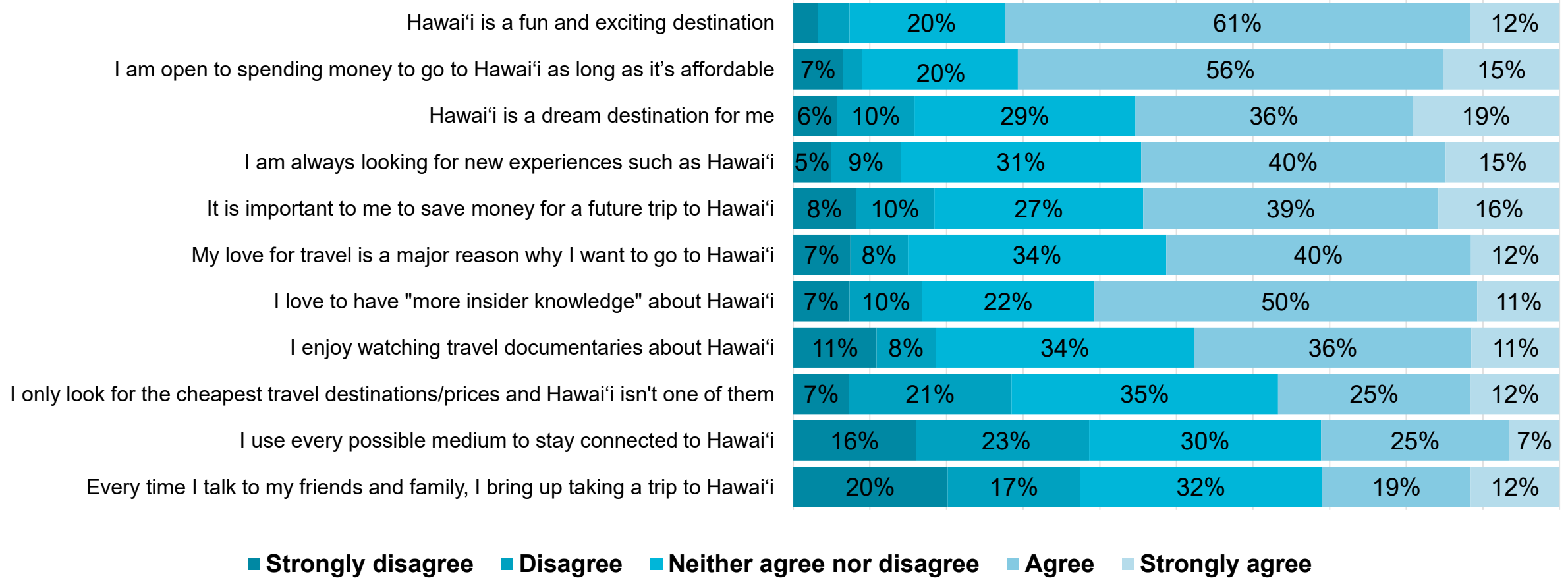
## Agreement Regarding Hawai'i as an Aspirational Destination



Sample Size: n=114

# Australia Couples Travelers: Hawai'i as an Aspirational Destination

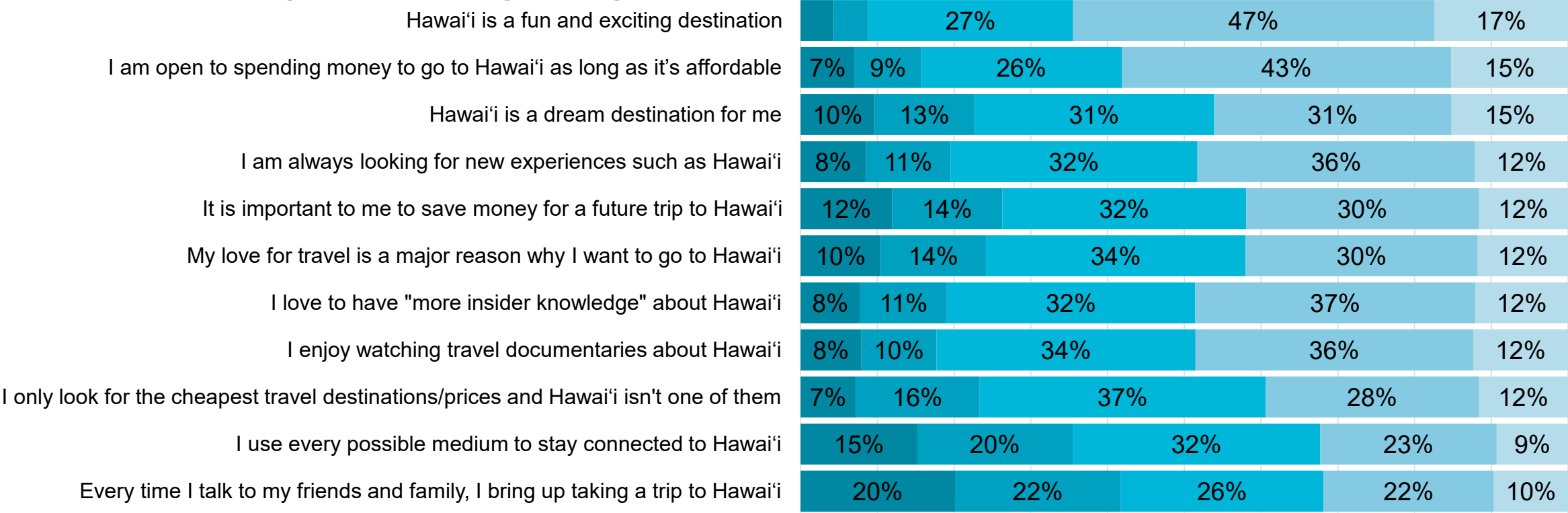
## Agreement Regarding Hawai'i as an Aspirational Destination



Sample Size: n=88

# Australia Nat Rep: Hawai'i as an Aspirational Destination

## Agreement Regarding Hawai'i as an Aspirational Destination

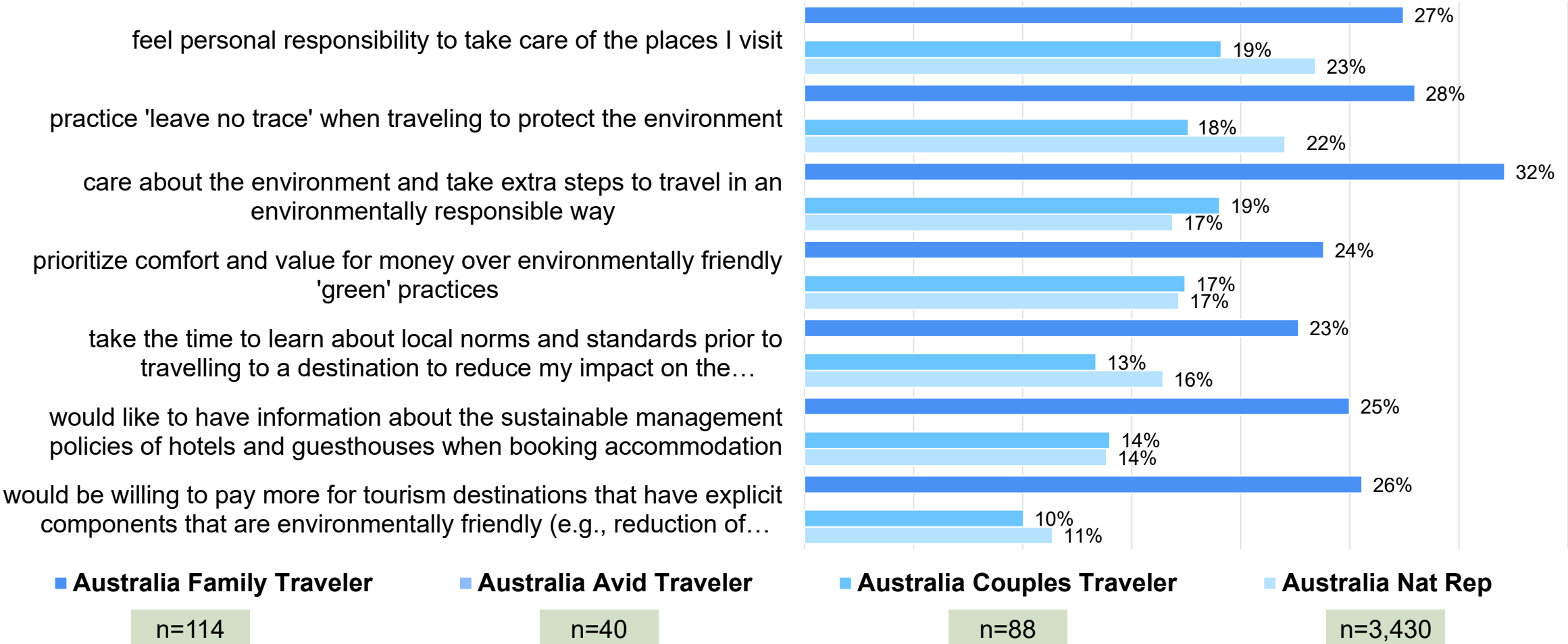


■ Strongly disagree ■ Disagree ■ Neither agree nor disagree ■ Agree ■ Strongly agree

Sample Size: n=3,430

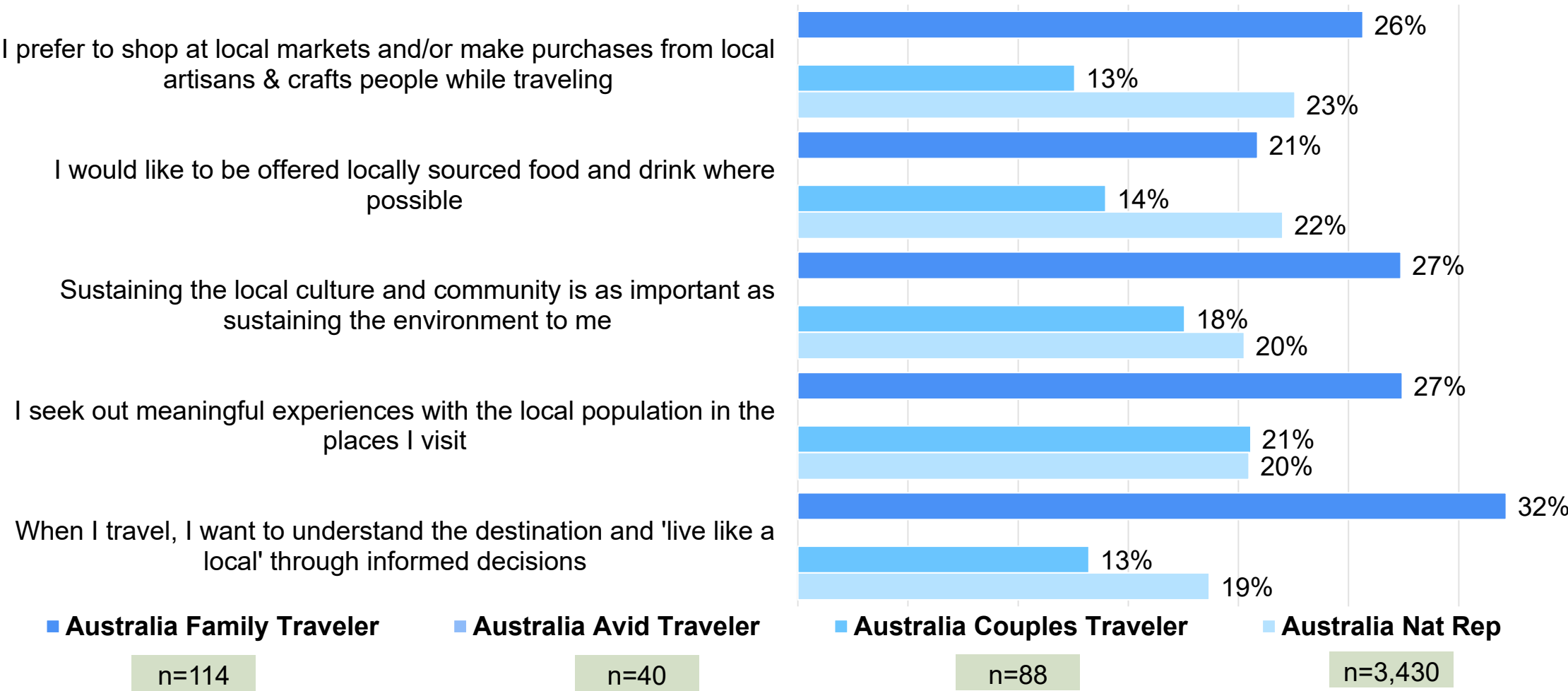
# Australia - Sustainability and Travel Responsibility Statements

## 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

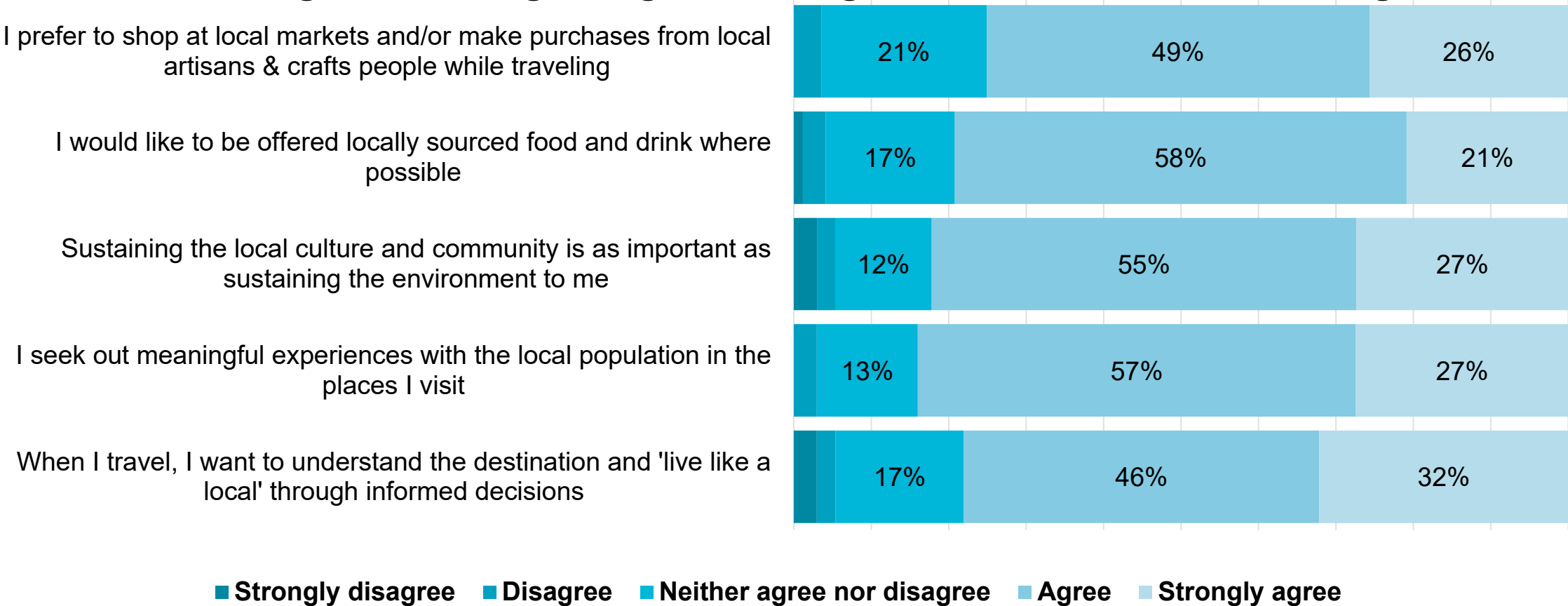


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Sample Size: n=114

# Australia Family Travelers: Sustainability and Travel Responsibility Statements

## Agreement Regarding Sustaining Local Culture While Traveling

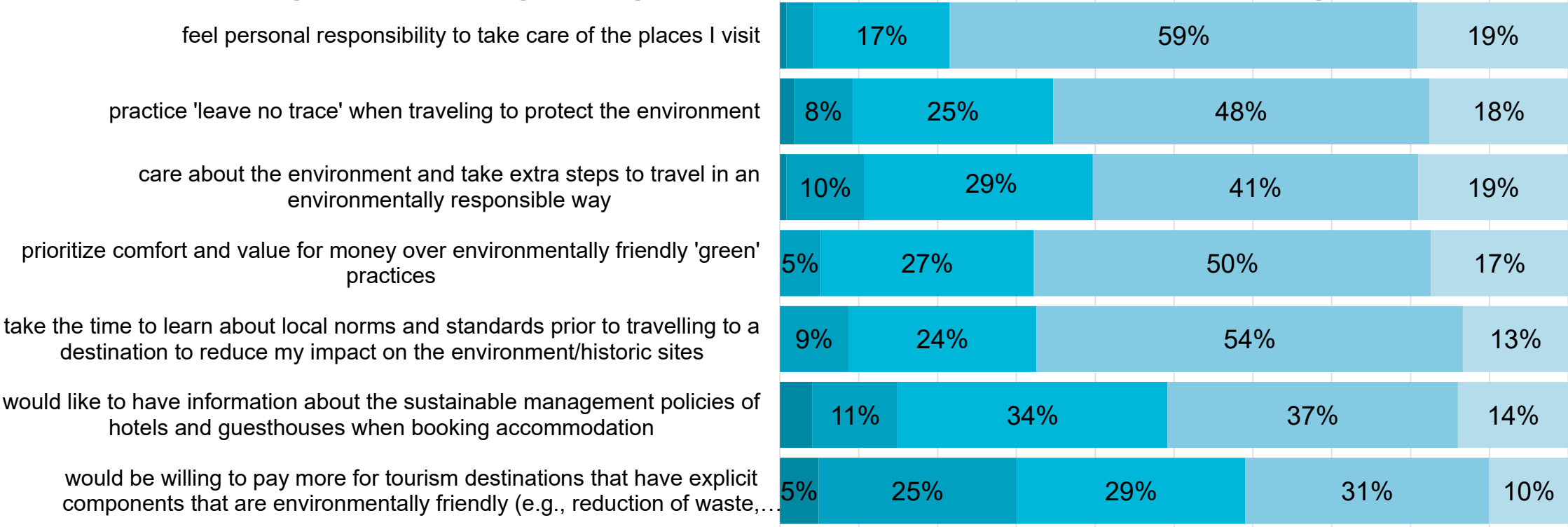


Sample Size: n=114



# Australia Couples 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=88

# Australia Couples Travelers: Sustainability and Travel Responsibility Statements

## Agreement Regarding Sustaining Local Culture While Traveling

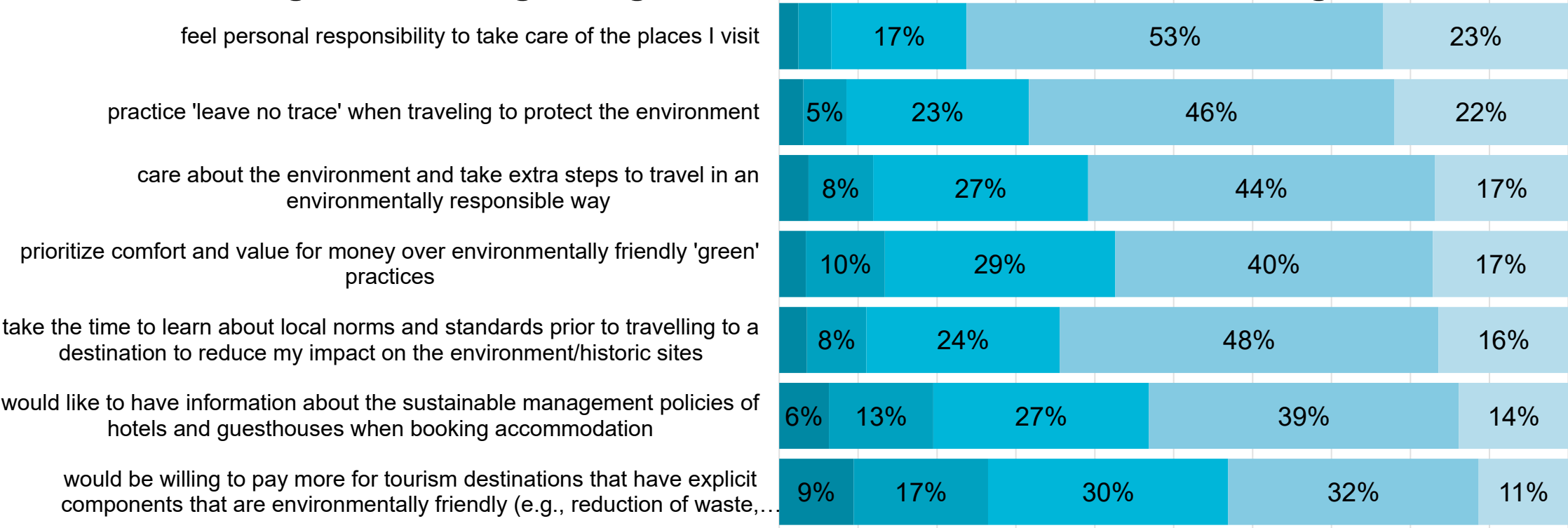


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Sample Size: n=88

# Australia Nat Rep: Sustainability and Travel Responsibility Statements

## Agreement Regarding Sustainable Practices While Traveling

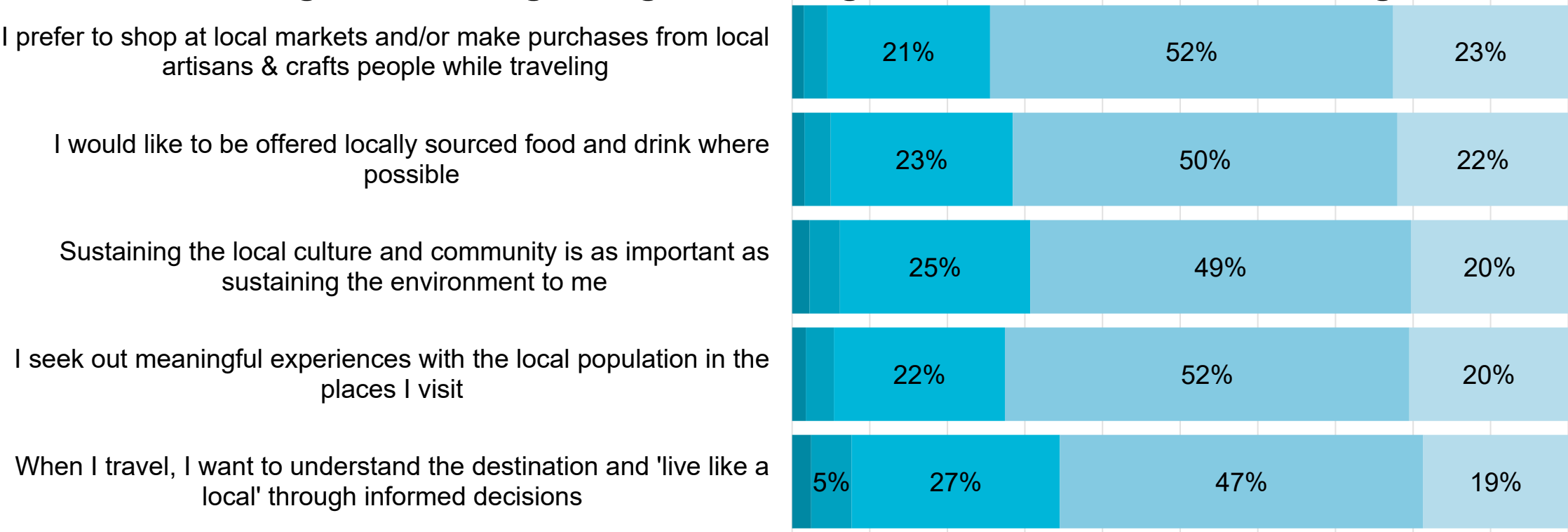


■ Strongly disagree ■ Disagree ■ Neither agree nor disagree ■ Agree ■ Strongly agree

Sample Size: n=3,430

# Australia Nat Rep: Sustainability and Travel Responsibility Statements

## Agreement Regarding Sustaining Local Culture While Traveling

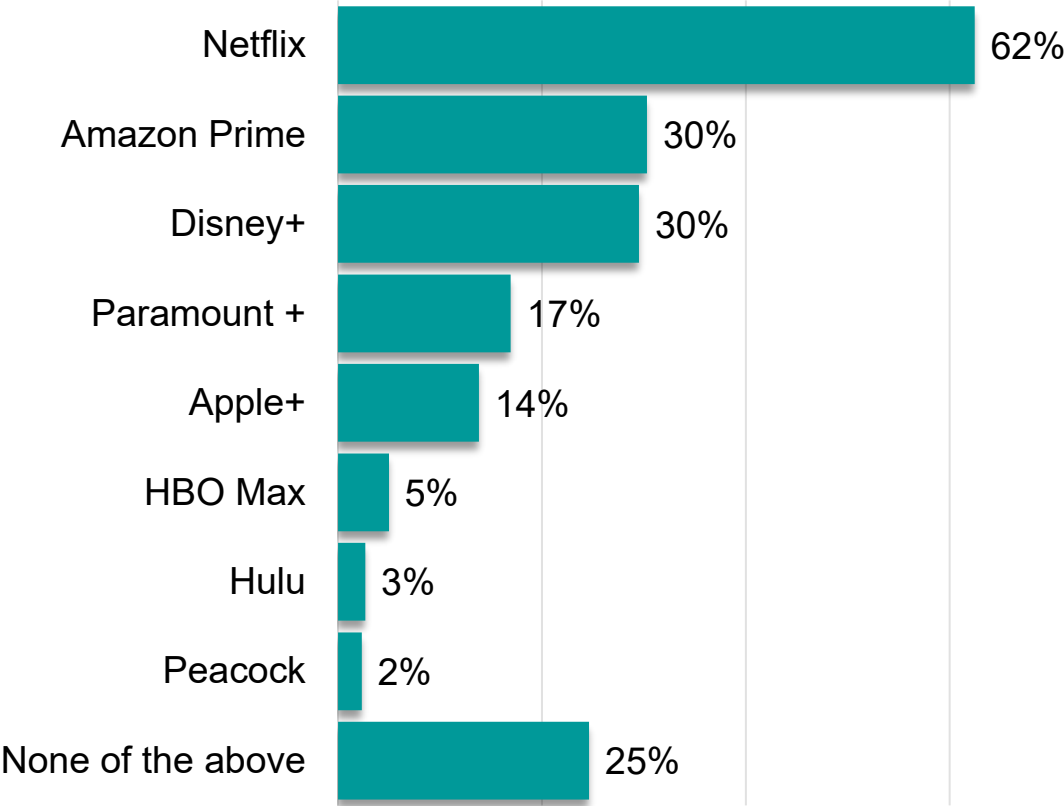


■ Strongly disagree ■ Disagree ■ Neither agree nor disagree ■ Agree ■ Strongly agree

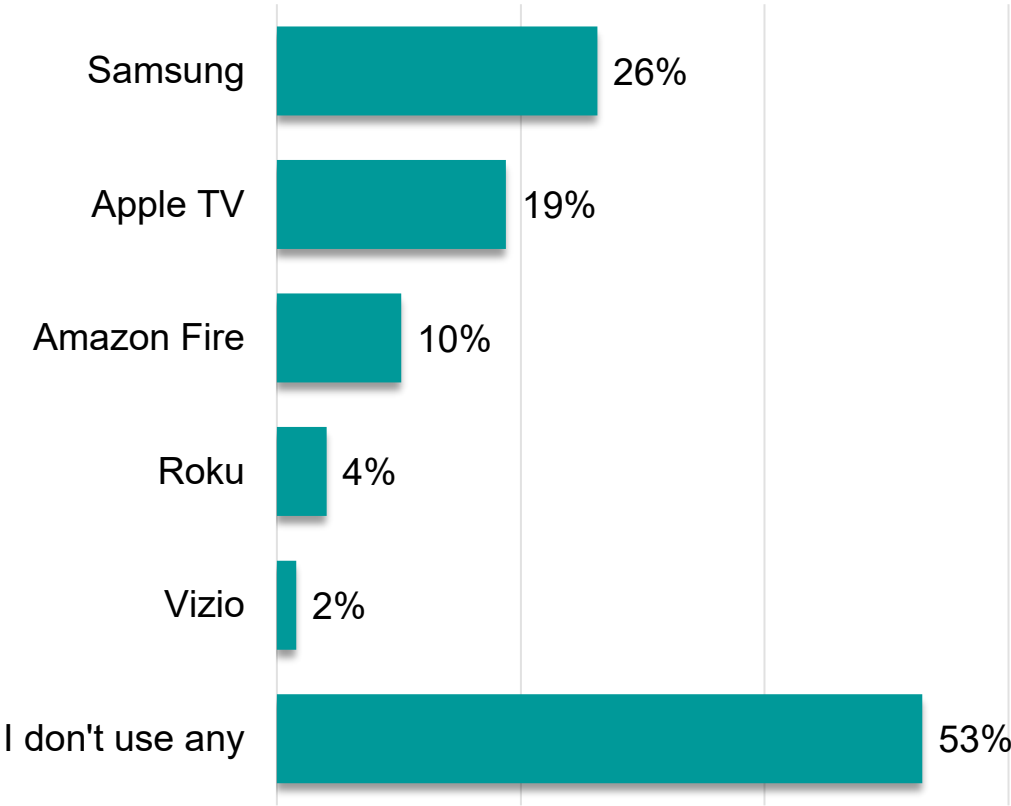
Sample Size: n=3,430

# Australia Media Consumption

Streaming Platforms Used Weekly



Connected Device Used

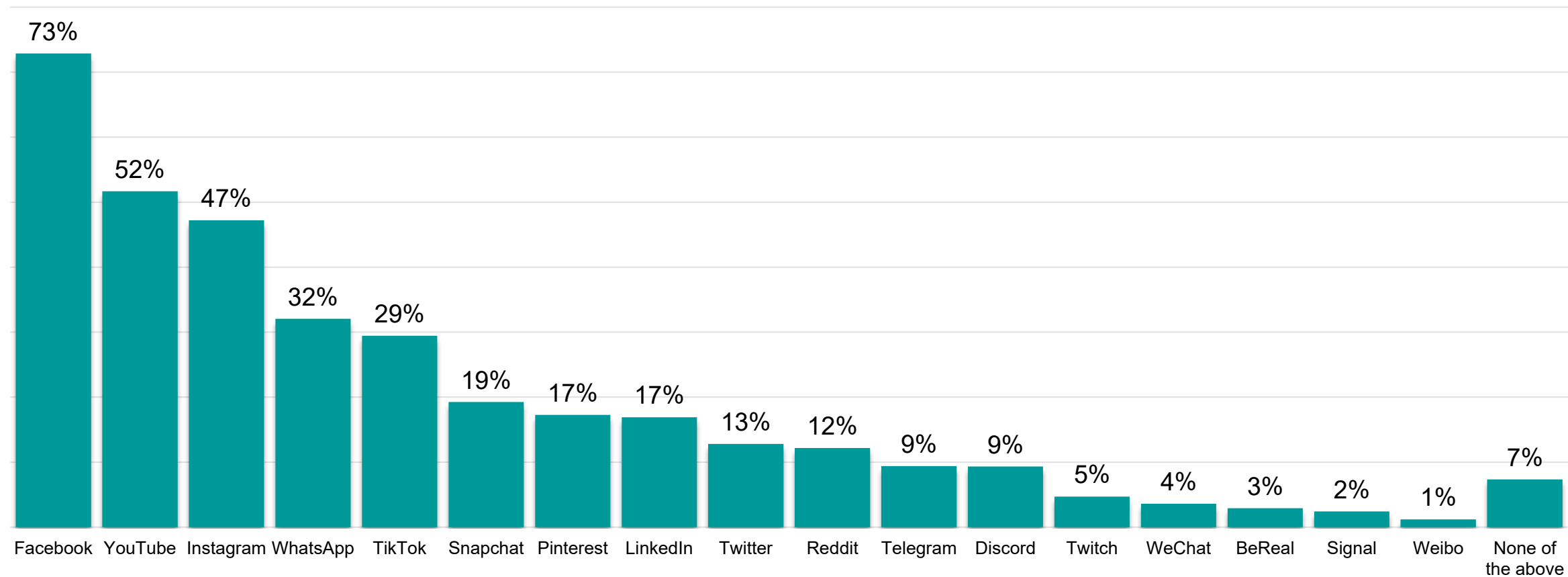


Sample Size: n=3,430

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=3,430

# Australia Media Consumption

## Travel Destination Source of Awareness

TV Program/Documentary	30%
Online	33%
Radio	12%
TV commercials	29%
Newspaper	16%
Friends/Family	46%
Social Media	37%
YouTube	33%
Out of Home Advertising (e.g., poster billboards, bus shelter advertisements, etc.)	9%
Email	20%
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	44%
I look up the destination on social media	24%
I talk to friends/family about the destination	34%
I book travel to the destination almost immediately	12%
I don't do anything	17%
None of the above	7%

Sample Size: n=3,430