

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

July 23, 2025





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

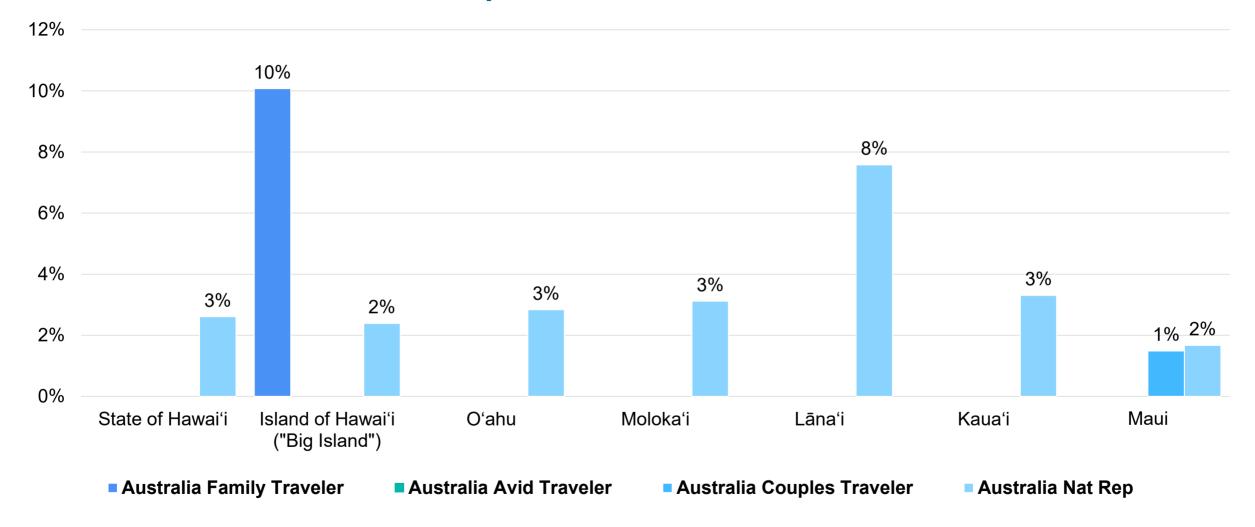
Couples Traveler

- 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)

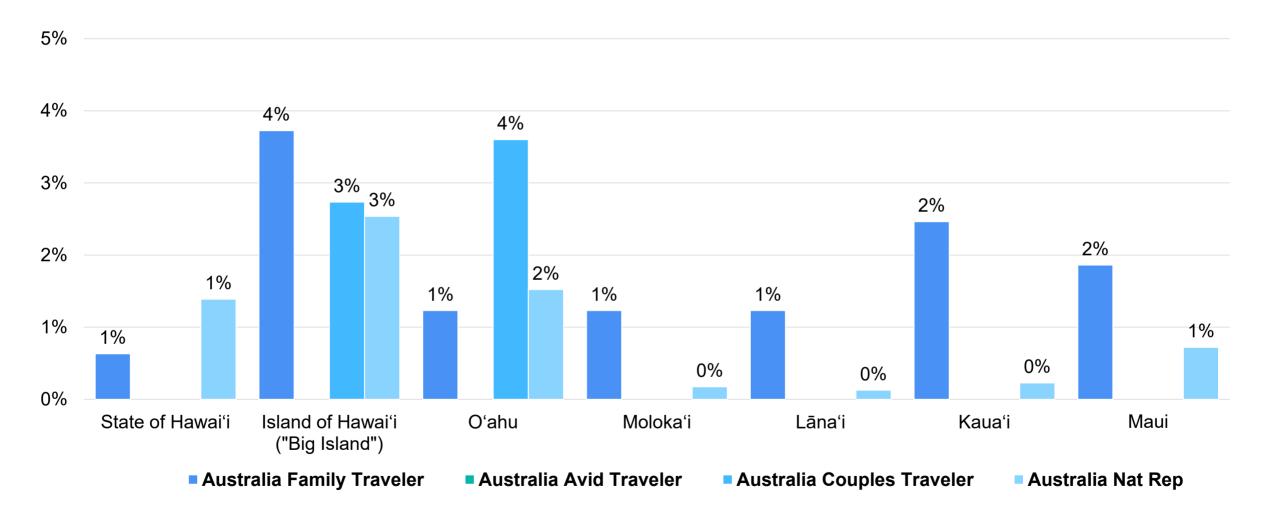
 Representative of Australia adults in terms of age, gender, social class and education

Australia - Leisure Trip in Past 12 Months



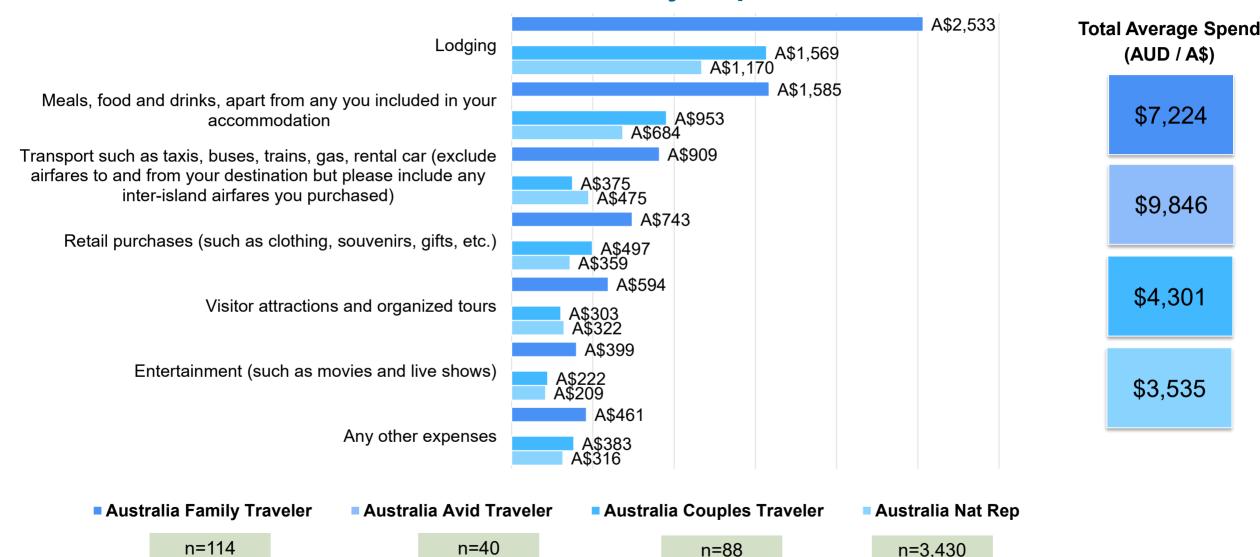
Sample Min. n=50

Australia - Next Destination for Leisure Trip



Sample Min. n=50

Australia - Total Annual Holiday Spend

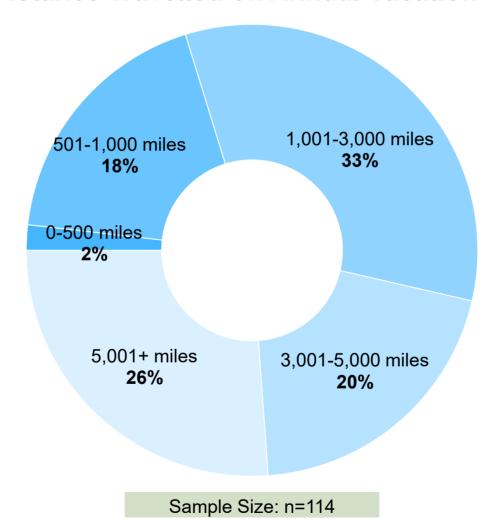


July 23, 2025

Australia Family Travelers: Annual Vacation

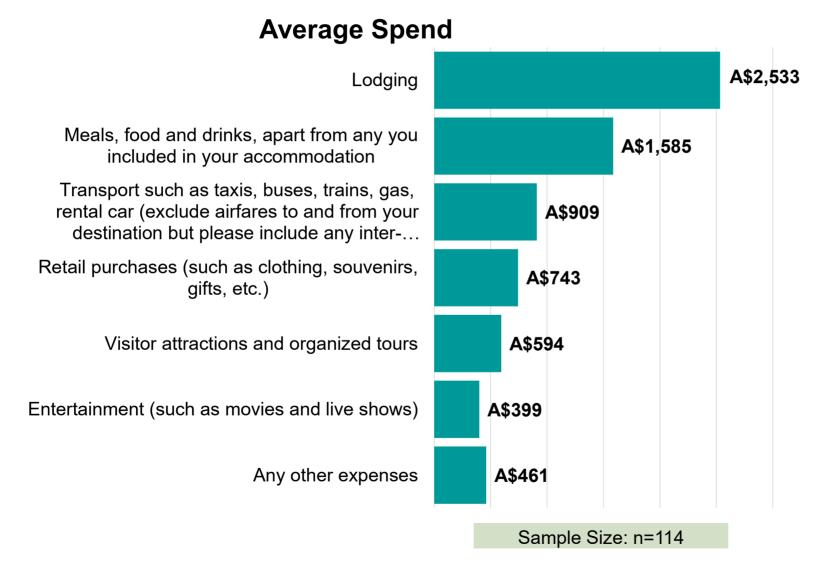
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Distance Travelled on Annual Vacation



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.

Australia Family Travelers: Annual Vacation



Spend Per Person Per Day

9.5

Ave # Nights on Annual Vacation

3.5

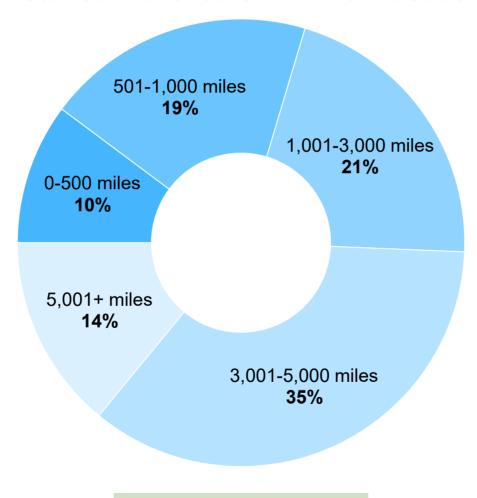
Ave # of People on Annual Vacation



Ave. Per Person Per Day Spend

Australia Couples Travelers: Annual Vacation

Distance Travelled on Annual Vacation



Australia Couples Travelers: Annual Vacation





Spend Per Person Per Day

8.3

Ave # Nights on Annual Vacation

2.5

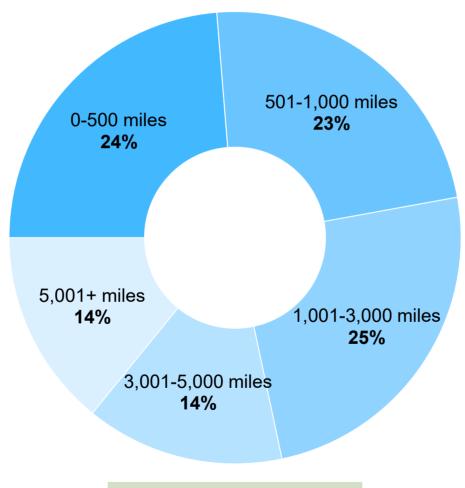
Ave # of People on Annual Vacation



Ave. Per Person Per Day Spend

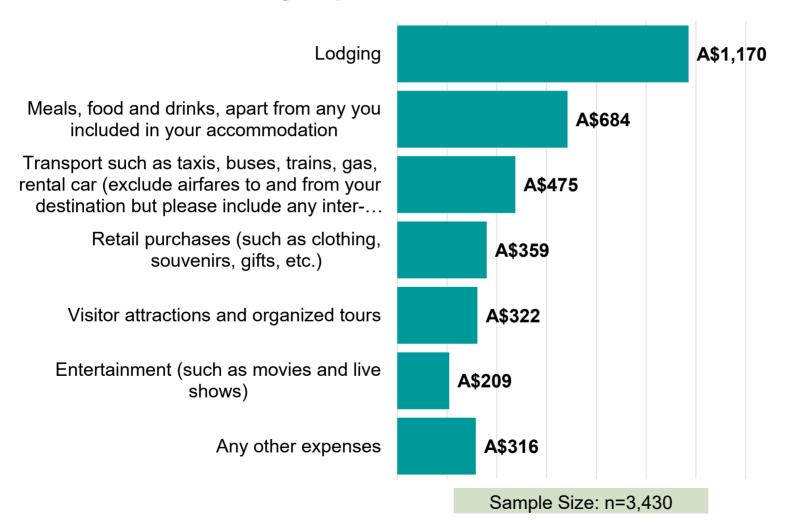
Australia Nat Rep: Annual Vacation

Distance Travelled on Annual Vacation



Australia Nat Rep: Annual Vacation

Average Spend



Spend Per Person Per Day

8.4

Ave # Nights on Annual Vacation

2.5

Ave # of People on Annual Vacation

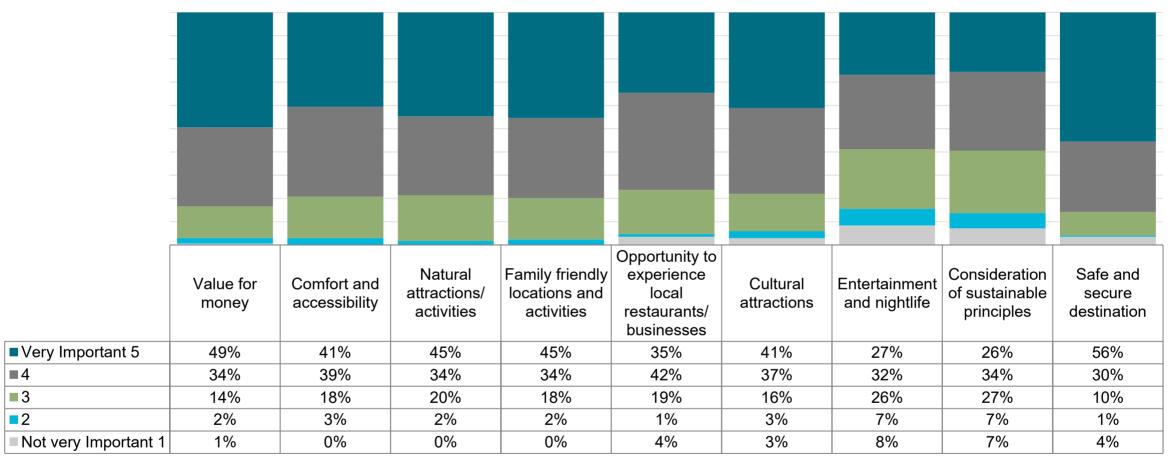


Ave. Per Person Per Day Spend

Australia - Importance of Travel Factors

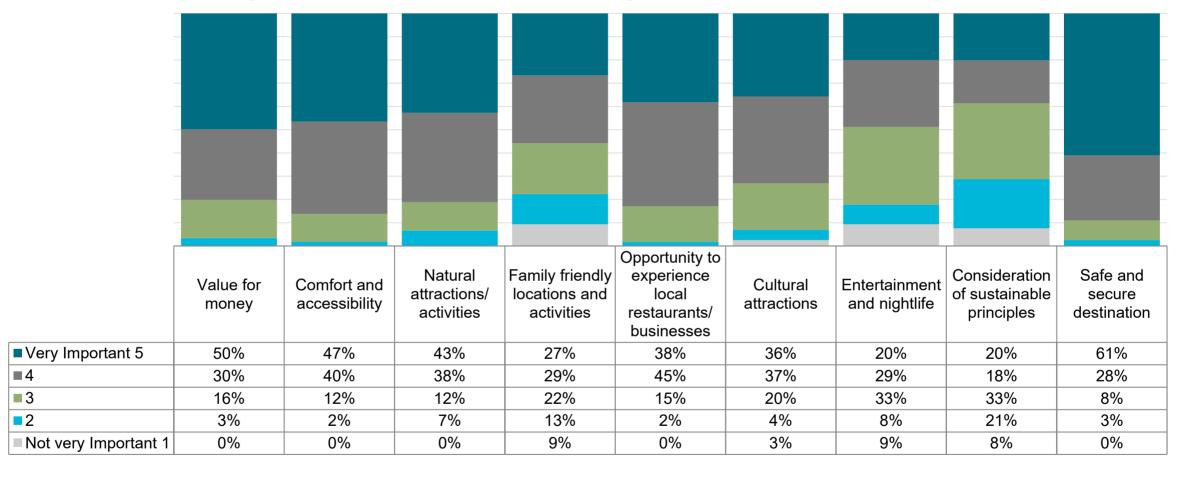
	Very Important 5			
	Australia: Family Traveler	Australia: Avid Traveler	Australia: Couples Traveler	Australia Market
Value for money	49%	53%	50%	53%
Comfort and accessibility	41%	45%	47%	42%
Natural attractions/activities	45%	52%	43%	40%
Family friendly locations and activities	45%	35%	27%	32%
Opportunity 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



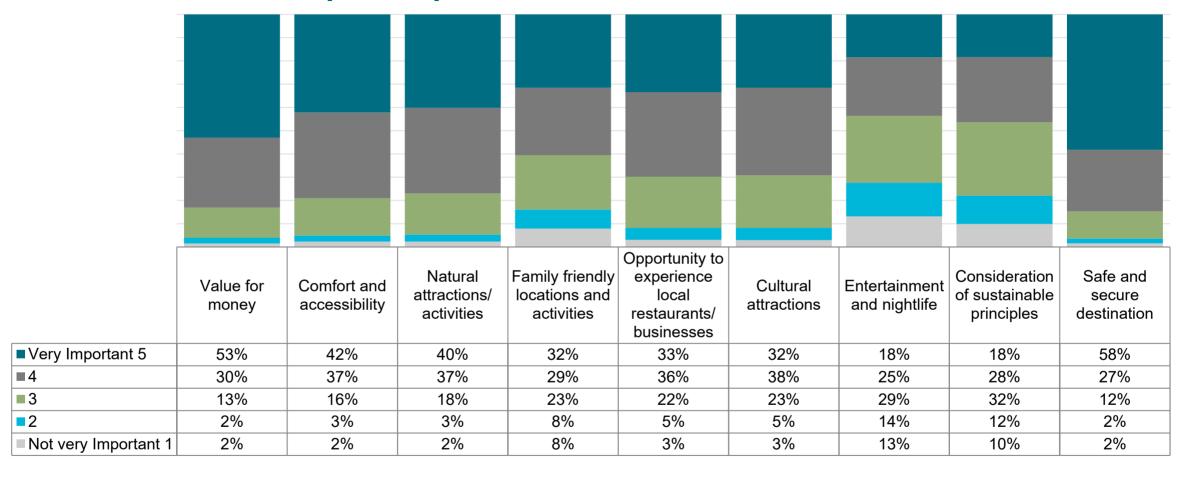
■Not very Important 1 ■2 ■3 ■4 ■Very Important 5

Australia Couples Travelers: Importance of Travel Factors



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

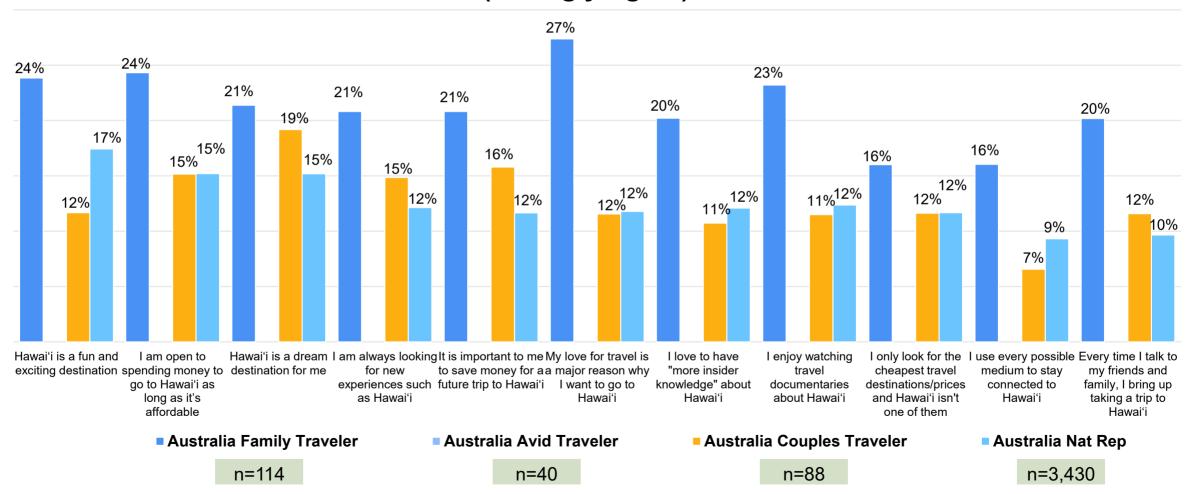
Australia Nat Rep: Importance of Travel Factors



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

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

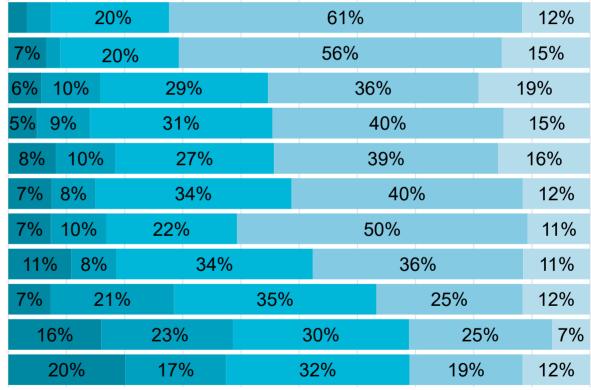
Hawai'i is a fun and exciting destination 5% 18% 52% 24% 25% 42% 24% I am open to spending money to go to Hawaii as long as it's affordable 6% 5% 6% 24% 43% 21% Hawai'i is a dream destination for me 5% 7% 45% 21% I am always looking for new experiences such as Hawai'i 22% 30% 41% 21% It is important to me to save money for a future trip to Hawai'i 32% 27% My love for travel is a major reason why I want to go to Hawai'i 7% 29% 26% 11% 42% 20% I love to have "more insider knowledge" about Hawai'i 27% 5% 9% 36% 23% I enjoy watching travel documentaries about Hawai'i 19% 27% 33% 16% I only look for the cheapest travel destinations/prices and Hawaii isn't one of them 10% 27% 40% 16% I use every possible medium to stay connected to Hawai'i 7% 9% 13% 22% 37% 20% 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 Couples Travelers: Hawai'i as an Aspirational Destination

Agreement Regarding Hawai'i as an Aspirational Destination

Hawai'i is a fun and exciting destination I am open to spending money to go to Hawaii 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

17% Hawai'i is a fun and exciting destination 27% 47% 9% 26% 43% 15% I am open to spending money to go to Hawai'i as long as it's affordable 31% 15% Hawai'i is a dream destination for me 10% 13% 31% 8% 11% 32% 36% 12% I am always looking for new experiences such as Hawai'i 12% 12% It is important to me to save money for a future trip to Hawai'i 14% 32% 30% 12% My love for travel is a major reason why I want to go to Hawai'i 10% 14% 34% 30% 12% 11% 32% 37% I love to have "more insider knowledge" about Hawai'i 36% I enjoy watching travel documentaries about Hawai'i 8% 10% 34% 12% 37% 28% 12% I only look for the cheapest travel destinations/prices and Hawai'i isn't one of them 16% 15% 20% 32% 23% 9% 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 20% 22% 26% 22% 10%

■ 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...



n=114

Australia Avid Traveler

n=40



Australia Couples Traveler



26%

25%

27%

28%

32%

19%

19%

18%

17%

17%

17%

16%

13%

14%

14%

23%

24%

22%

23%

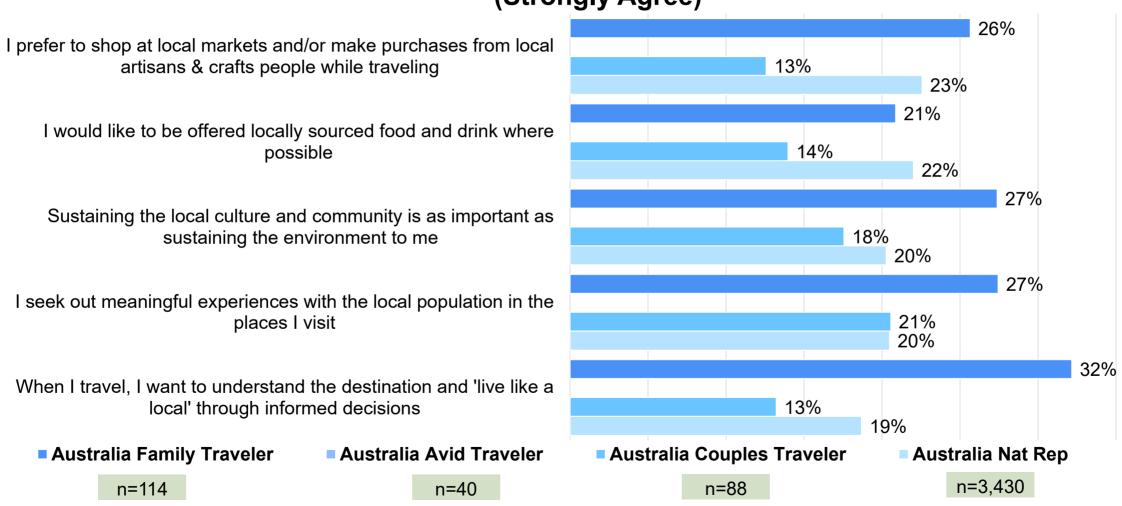
n=88

n=3,430



Australia - Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling (Strongly Agree)



Australia Family Travelers: Sustainability and Travel Responsibility Statements

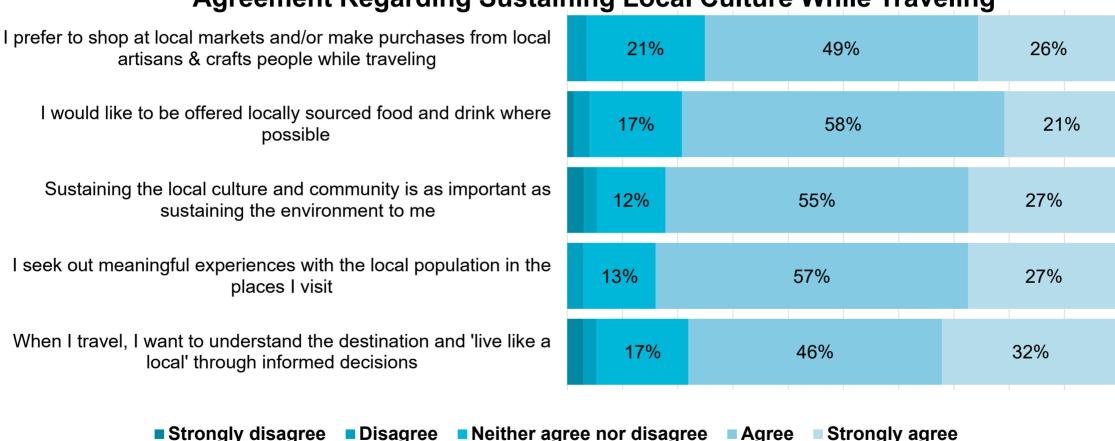
Agreement Regarding Sustainable Practices While Traveling



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

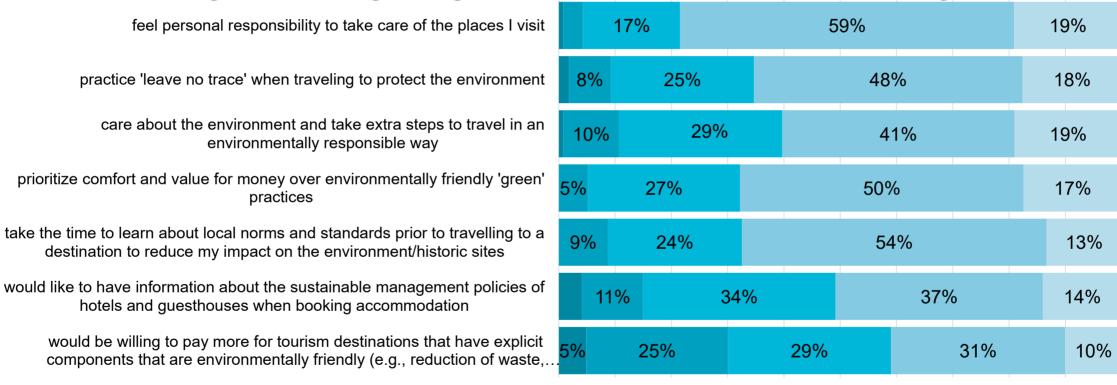
Australia Family Travelers: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling



Australia Couples Travelers: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustainable Practices While Traveling



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

Australia Couples Travelers: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling

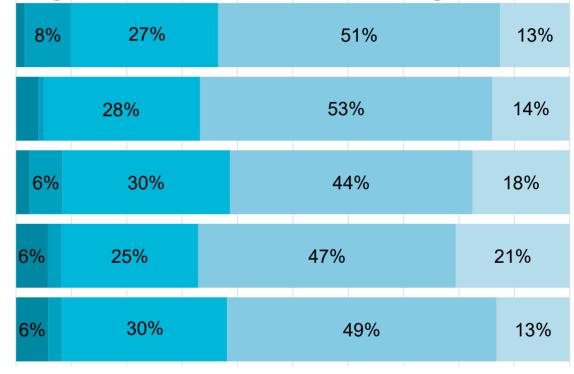
I prefer to shop at local markets and/or make purchases from local artisans & crafts people while traveling

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



Strongly disagree Disagree ■ Neither agree nor disagree Strongly agree Agree

Australia Nat Rep: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustainable Practices While Traveling



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

Australia Nat Rep: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling

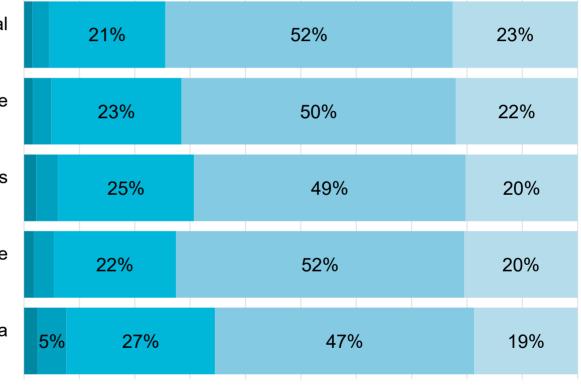
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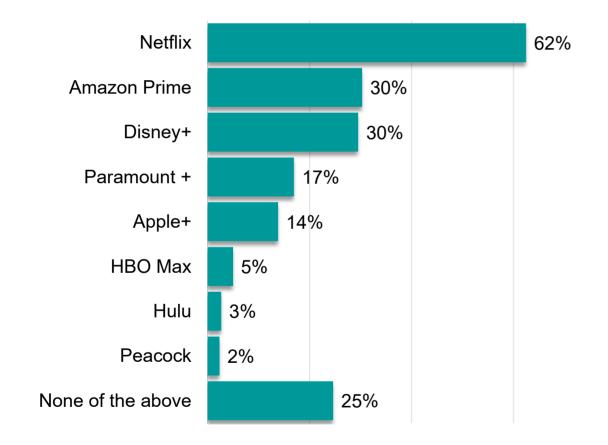
When I travel. I want to understand the destination and 'live like a local' through informed decisions



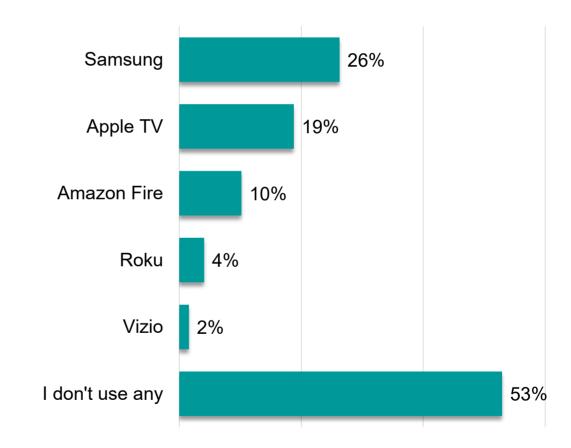
■ Disagree ■ Neither agree nor disagree Strongly disagree Agree Strongly agree

Australia Media Consumption

Streaming Platforms Used Weekly

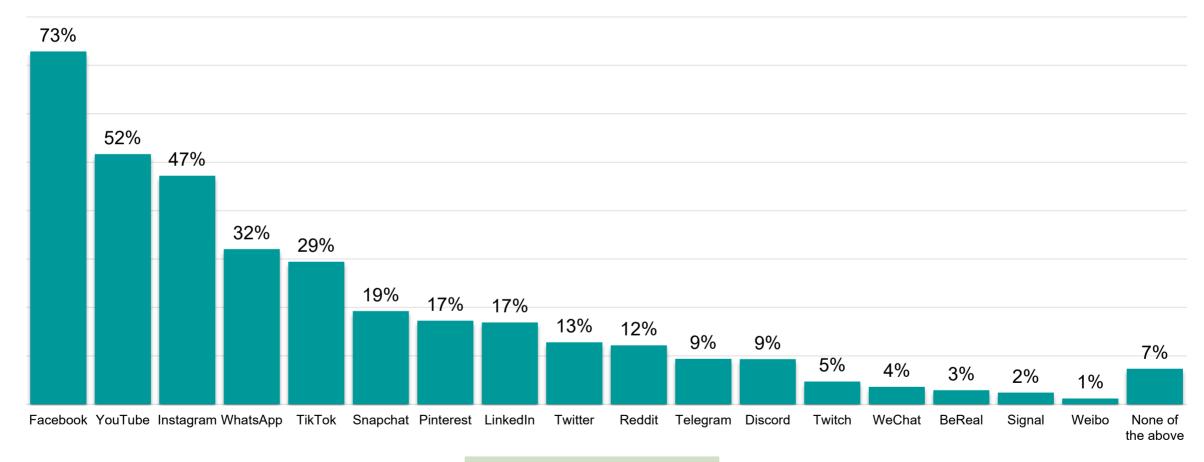


Connected Device Used



Australia Media Consumption

Social Media Platforms Used Weekly



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**

31%
44%
24%
34%
12%
17%
7%