VISION INSIGHTS

Vision Insights Canada Traveler Profiles Q2 2025

July 23, 2025





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

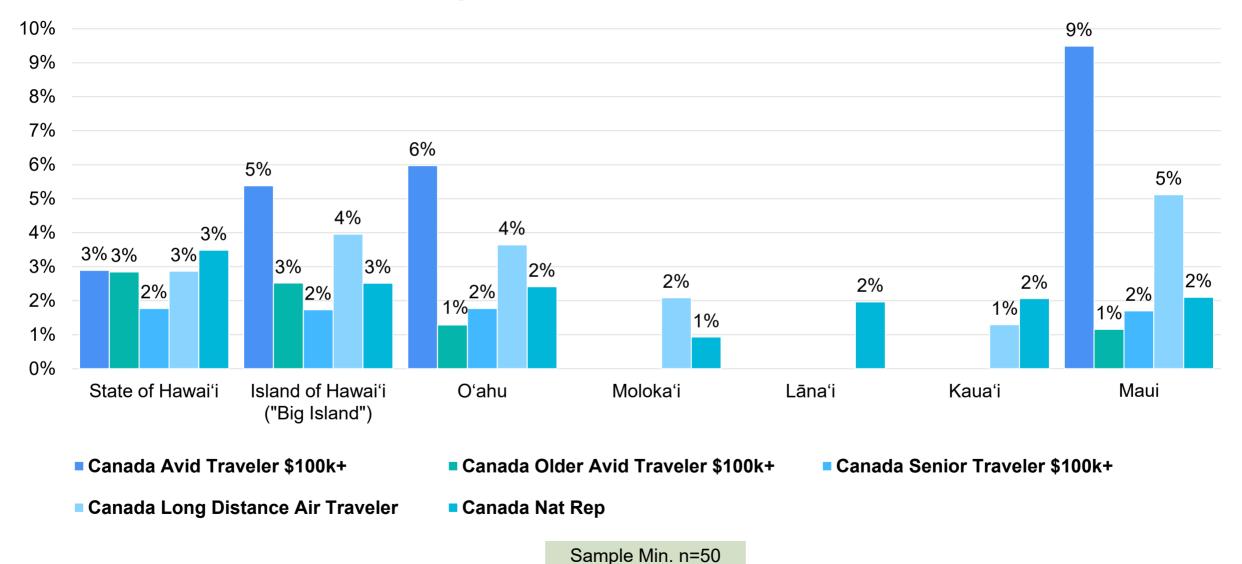
Older Avid Traveler \$100k+

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

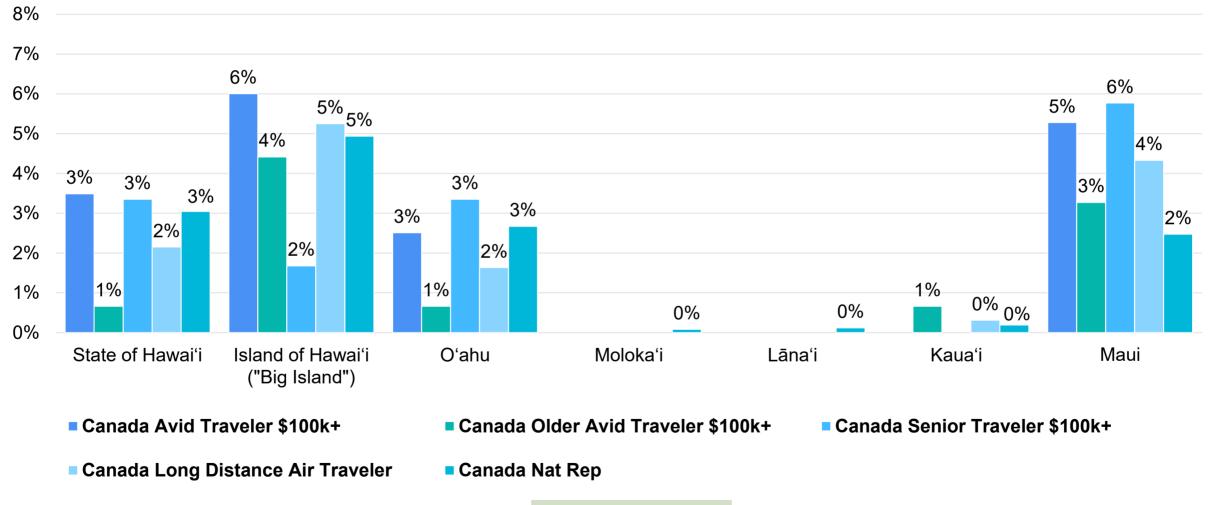
Senior Traveler \$100k+

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

Canada - Leisure Trip in Past 12 Months

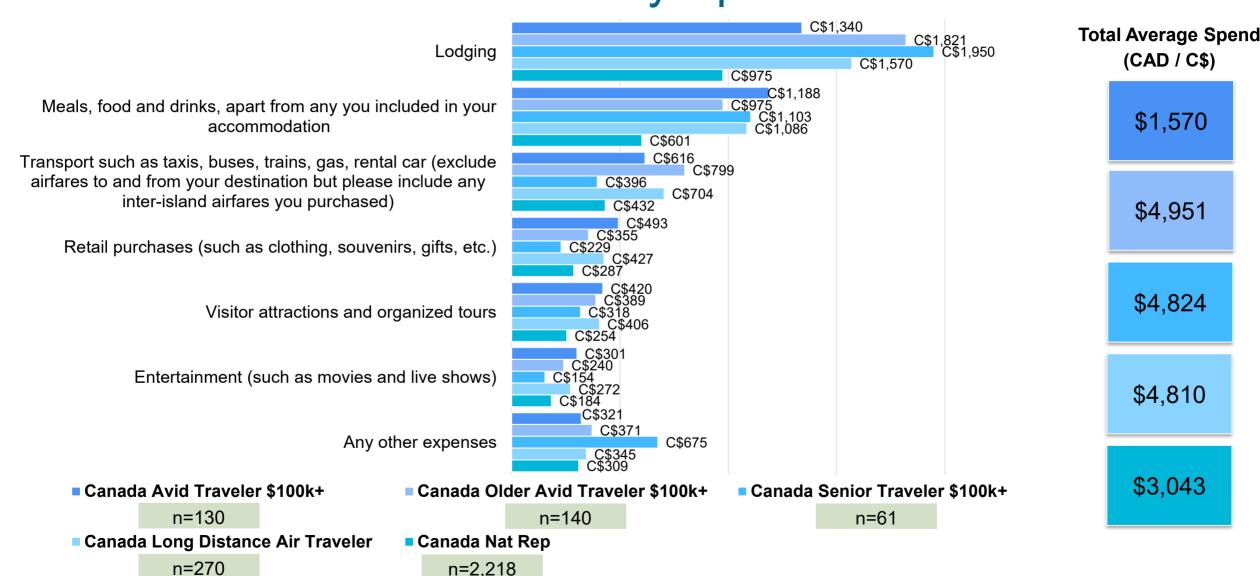


Canada - Next Destination for Leisure Trip



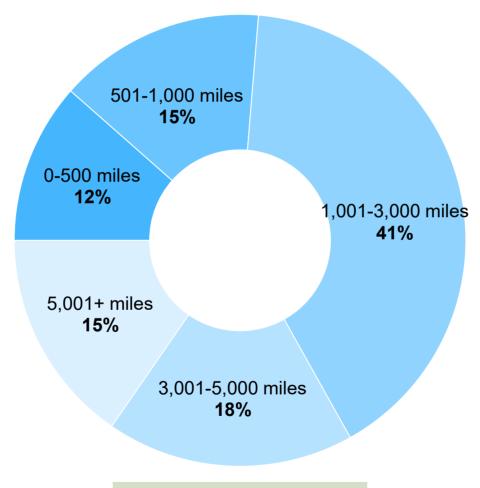
Sample Min. n=75

Canada - Total Annual Holiday Spend

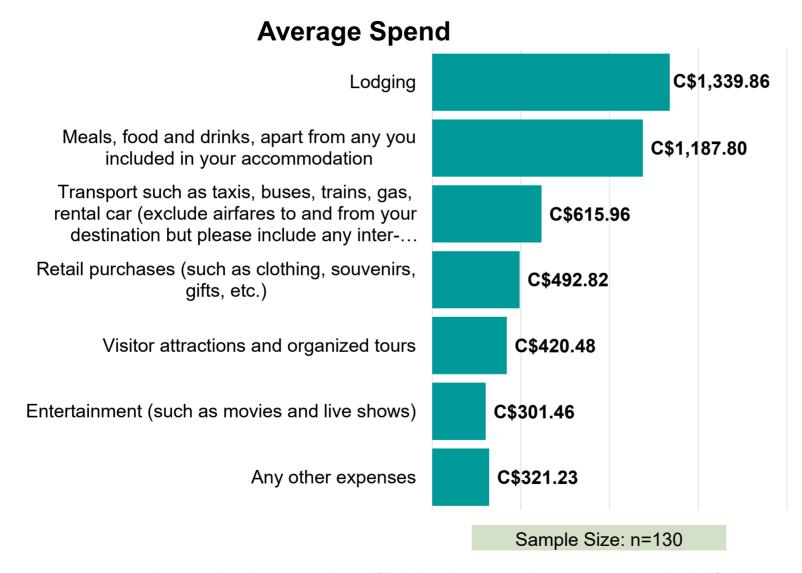


Canada Avid Travelers \$100k+: Annual Vacation

Distance Travelled on Annual Vacation



Canada Avid Travelers \$100k+: Annual Vacation



Spend Per Person Per Day

7.1Ave # Nights on Annual Vacation

2.9

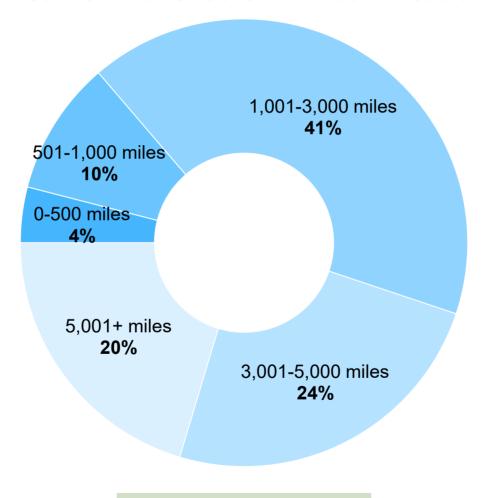
Ave # of People on Annual Vacation

C\$229.36

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

9.0

Ave # Nights on Annual Vacation

2.5

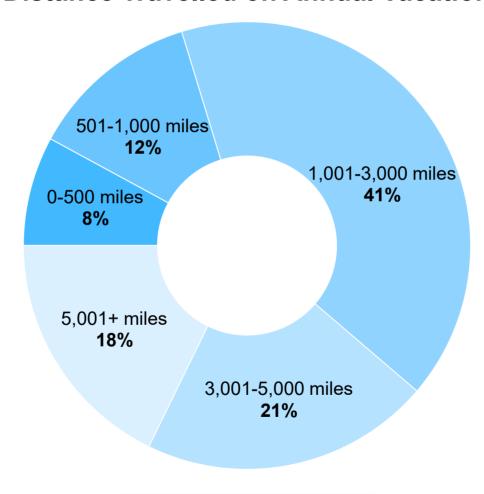
Ave # of People on Annual Vacation



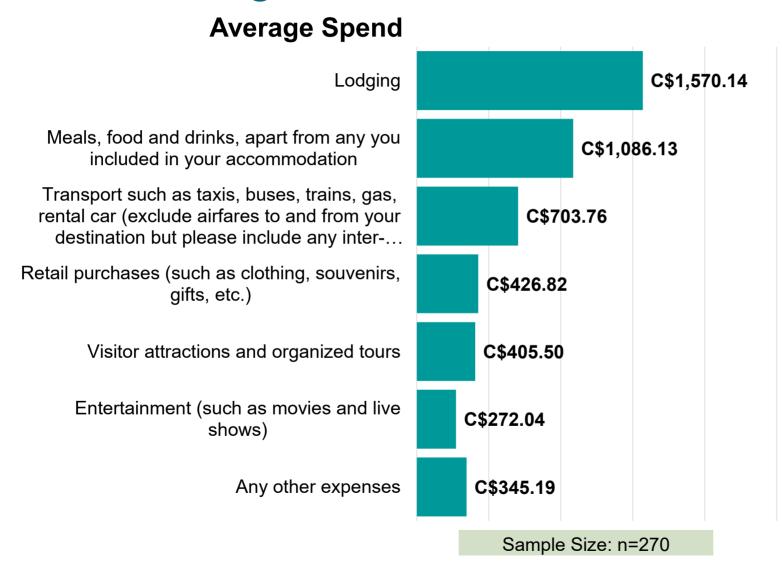
Ave. Per Person Per Day Spend

Canada Long-Distance Travelers: Annual Vacation

Distance Travelled on Annual Vacation



Canada Long-Distance Travelers: Annual Vacation



Spend Per Person Per Day

8.0

Ave # Nights on Annual Vacation

2.7

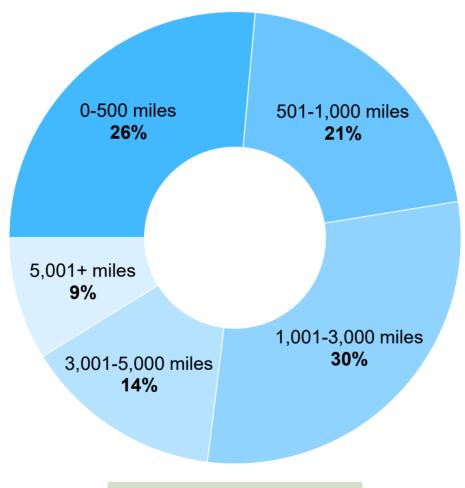
Ave # of People on Annual Vacation



Ave. Per Person Per Day Spend

Canada Nat Rep: Annual Vacation

Distance Travelled on Annual Vacation



Canada Nat Rep: Annual Vacation

Average Spend



Spend Per Person Per Day

7.0

Ave # Nights on Annual Vacation

2.5

Ave # of People on Annual Vacation

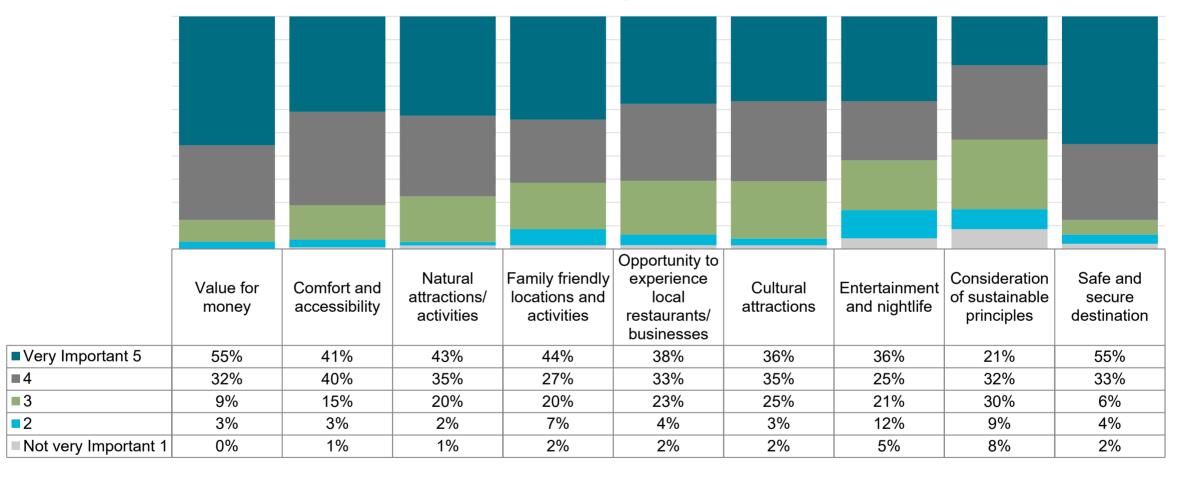


Ave. Per Person Per Day Spend

Canada - Importance of Travel Factors

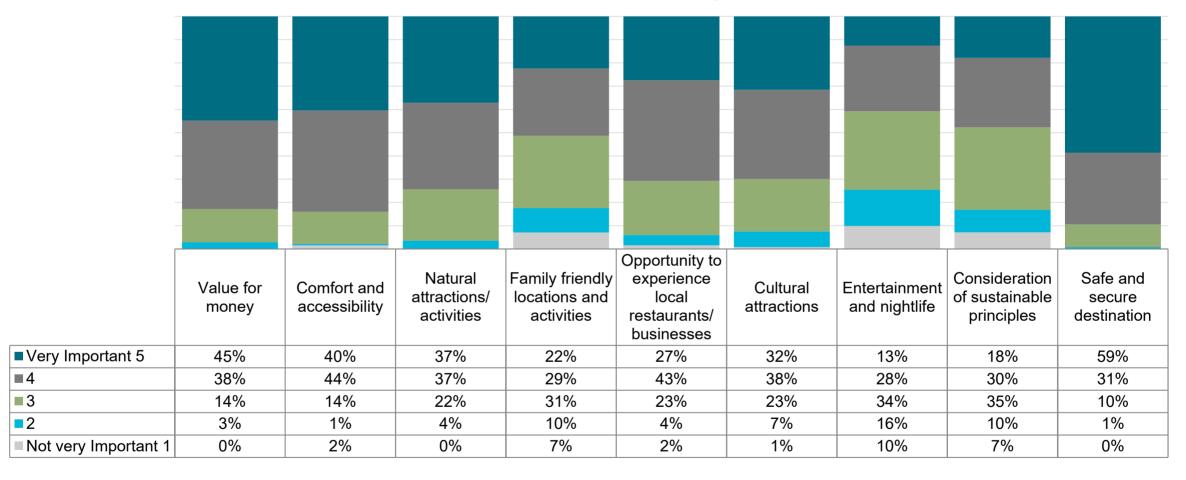
	Very Important 5				
	Canada: Avid Traveler \$100k+	Canada: Older Avid Traveler \$100k+	Canada: Senior Traveler \$100k+	Canada: Long- Distance Air Traveler	Canada Market
Value for money	55%	45%	55%	50%	55%
Comfort and accessibility	41%	40%	40%	41%	46%
Natural attractions/activities	43%	37%	43%	40%	41%
Family friendly locations and activities	44%	22%	13%	34%	32%
Opportunity to experience local restaurants/businesses	38%	27%	31%	33%	34%
Cultural attractions	36%	32%	30%	34%	34%
Entertainment and nightlife	36%	13%	8%	25%	22%
Consideration of sustainable principles	21%	18%	15%	19%	23%
Safe and Secure Destination	55%	59%	69%	57%	60%
Sample Size:	n=130	n=140	n=61	n=270	n=2,218

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



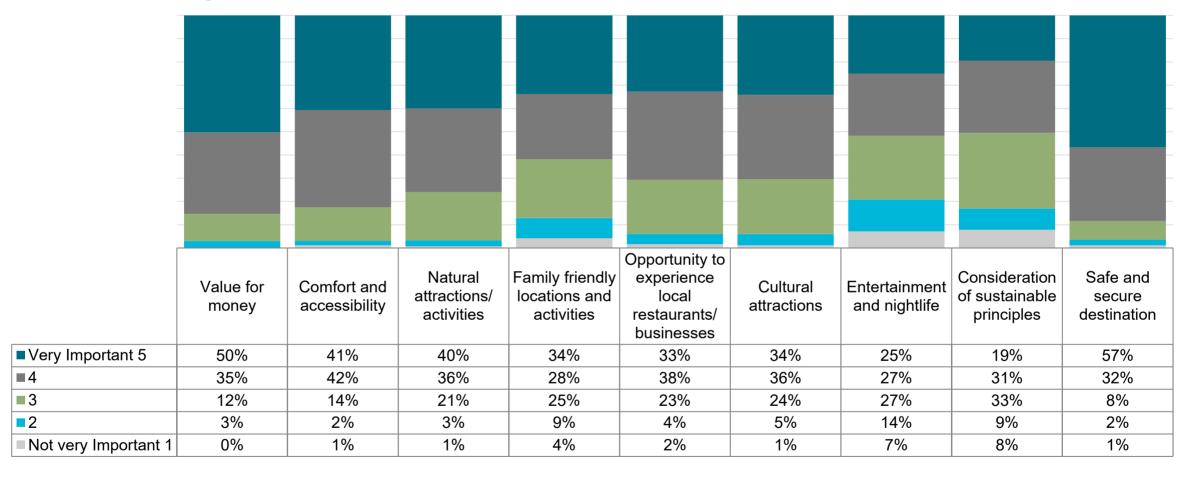
■ Not very Important 1 **2 3 4** ■ Very Important 5

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



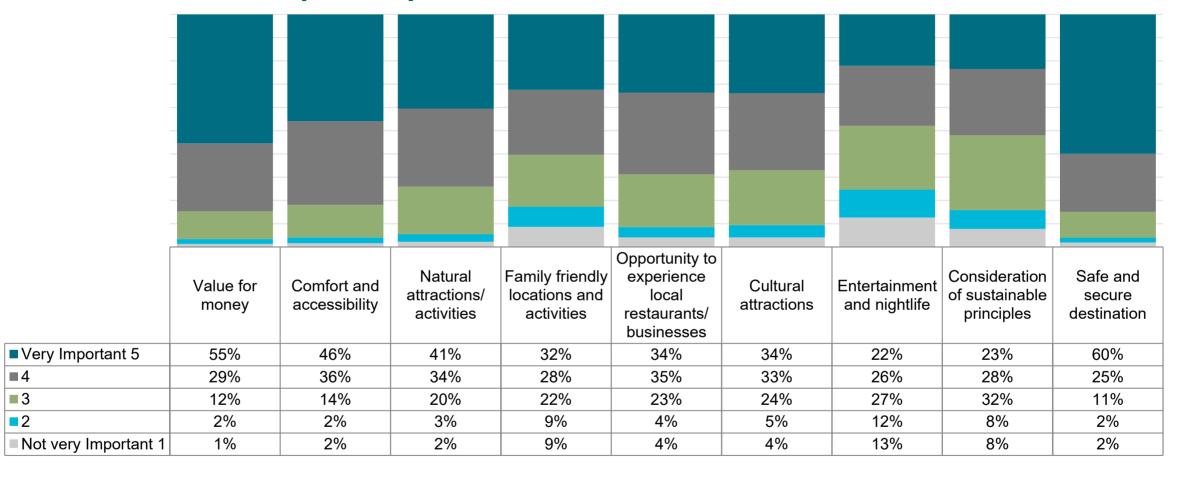
■ Not very Important 1 ■ 2 ■ 3 ■ 4 ■ Very Important 5

Canada Long Distance Travelers: Importance of Travel Factors



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

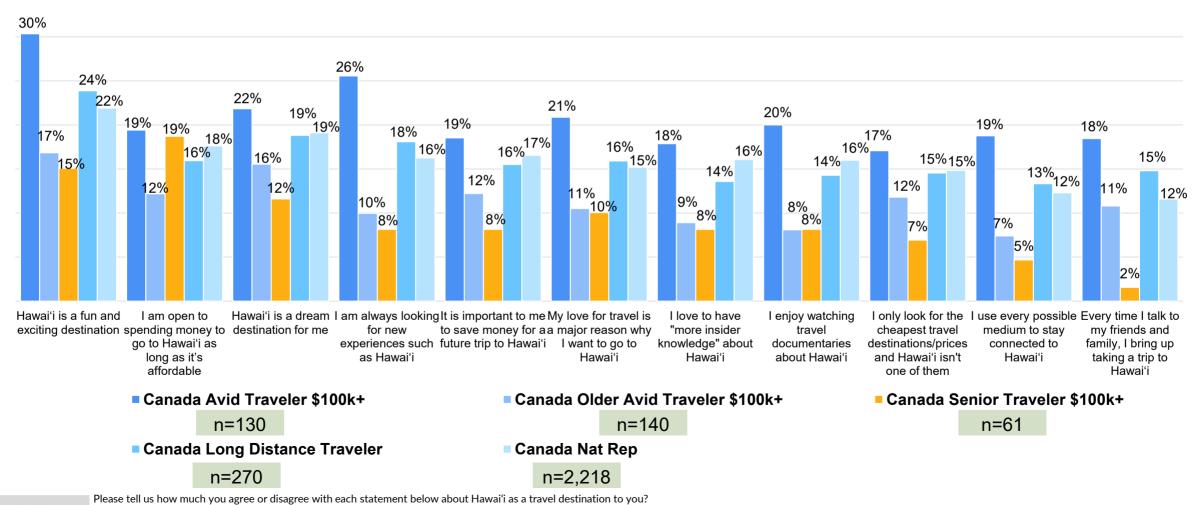
Canada Nat Rep: Importance of Travel Factors



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

Canada - Hawai'i as an Aspirational Destination

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



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

Agreement Regarding Hawai'i as an Aspirational Destination

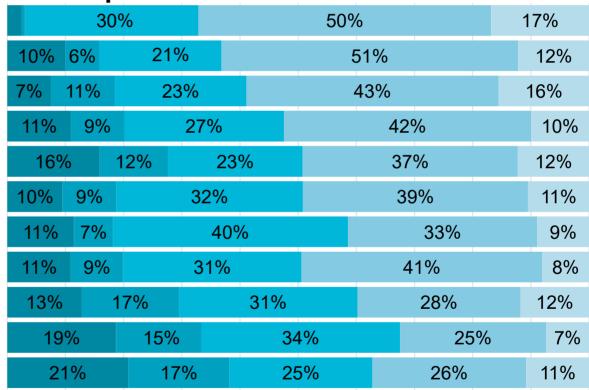
30% Hawai'i is a fun and exciting destination 22% 43% 5% 48% I am open to spending money to go to Hawaii as long as it's affordable 24% 19% 23% 46% 22% Hawai'i is a dream destination for me 7% 39% 28% 26% I am always looking for new experiences such as Hawai'i 9% 42% 28% 19% It is important to me to save money for a future trip to Hawai'i 43% 21% My love for travel is a major reason why I want to go to Hawai'i 5% 28% 32% 5% 43% 18% I love to have "more insider knowledge" about Hawai'i 25% 6% 44% 20% I enjoy watching travel documentaries about Hawai'i 31% 17% I only look for the cheapest travel destinations/prices and Hawaii isn't one of them 18% 29% 15% 29% 30% 19% I use every possible medium to stay connected to Hawai'i 9% 14% 27% 32% 18% 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

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

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

Agreement Regarding Hawai'i as an Aspirational Destination

16%

19%

18%

16%

16%

14%

14%

15%

13%

15%

46% 24% Hawai'i is a fun and exciting destination 26% 6% 6% 22% 50% I am open to spending money to go to Hawai'i as long as it's affordable 5% 9% 23% 45% Hawai'i is a dream destination for me 7% 6% 28% 41% I am always looking for new experiences such as Hawai'i 9% 10% 39% 25% It is important to me to save money for a future trip to Hawai'i 6% 7% 41% 30% My love for travel is a major reason why I want to go to Hawai'i 7% 6% 36% 38% I love to have "more insider knowledge" about Hawai'i 7% 8% 28% 43% I enjoy watching travel documentaries about Hawai'i 9% 18% 30% 29% 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 12% 15% 32% 28% 15% 16% 26% 29% Every time I talk to my friends and family, I bring up taking a trip to Hawai'i



Canada Nat Rep: Hawai'i as an Aspirational Destination

Agreement Regarding Hawai'i as an Aspirational Destination

Hawaiʻi is a fun and exciting destination		2	8%		42%	22%
I am open to spending money to go to Hawaiʻi as long as it's affordable		8%	25%		40%	18%
Hawai'i is a dream destination for me	11%	10%	27%		33%	19%
I am always looking for new experiences such as Hawaiʻi	11%	9%	30%	ó	34%	16%
It is important to me to save money for a future trip to Hawaiʻi	14%	129	%	28%	30%	17%
My love for travel is a major reason why I want to go to Hawaiʻi	13%	11%	3	31%	31%	15%
I love to have "more insider knowledge" about Hawaiʻi	11%	8%	32%	ò	34%	16%
I enjoy watching travel documentaries about Hawaiʻi	10%	9%	30%	ó	34%	16%
I only look for the cheapest travel destinations/prices and Hawai'i isn't one of them	10%	12%		35%	28%	15%
I use every possible medium to stay connected to Hawaiʻi	189	%	16%	32%	23%	12%
Every time I talk to my friends and family, I bring up taking a trip to Hawaiʻi	2:	2%	17%	299	% 21%	12%

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

Canada - 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

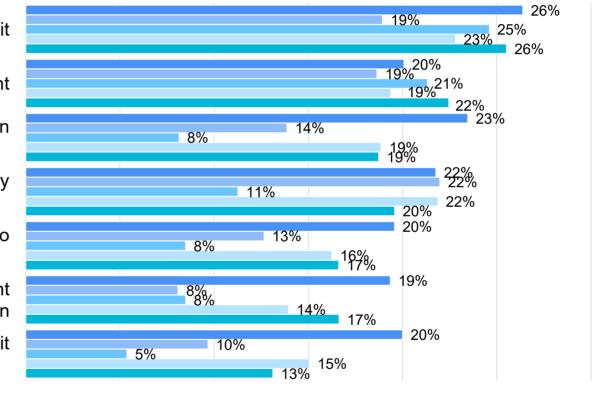
care about the environment and take extra steps to travel in an environmentally responsible way

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 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...



Canada Senior Traveler \$100k+

n=61

Canada Avid Traveler \$100k+

n=130

Canada Long Distance Traveler

Canada Older Avid Traveler \$100k+

n=140

Canada Nat Rep

n=2.218

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



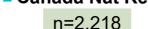
n=130

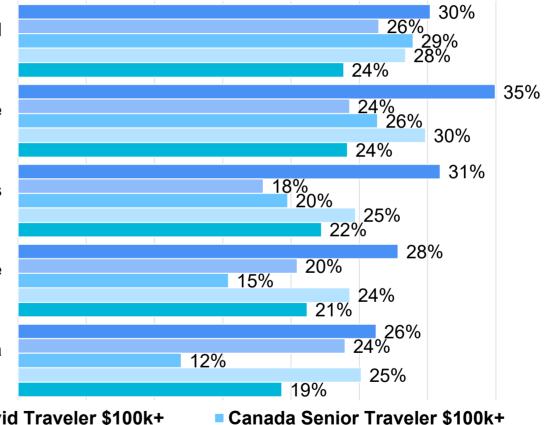
Canada Long Distance Traveler n = 270



n=140

Canada Nat Rep





n = 61

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

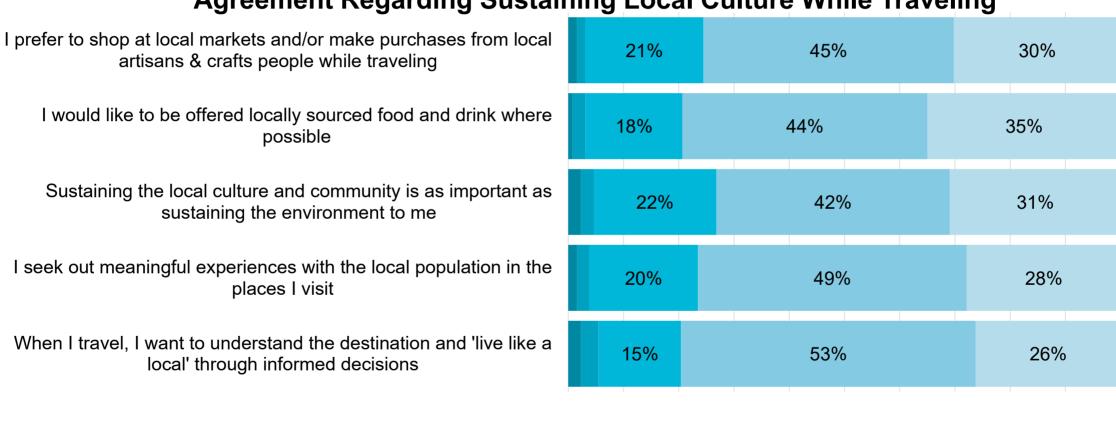
Agreement Regarding Sustainable Practices While Traveling



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

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

Agreement Regarding Sustaining Local Culture While Traveling



Sample Size: n=130

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

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

Agreement Regarding Sustainable Practices While Traveling



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

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

Agreement Regarding Sustaining Local Culture While Traveling

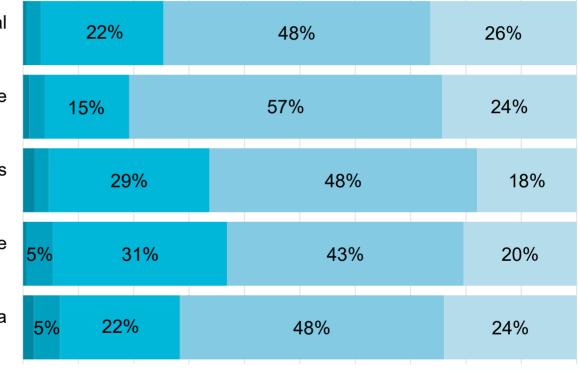
I prefer to shop at local markets and/or make purchases from local artisans & crafts people while traveling

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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

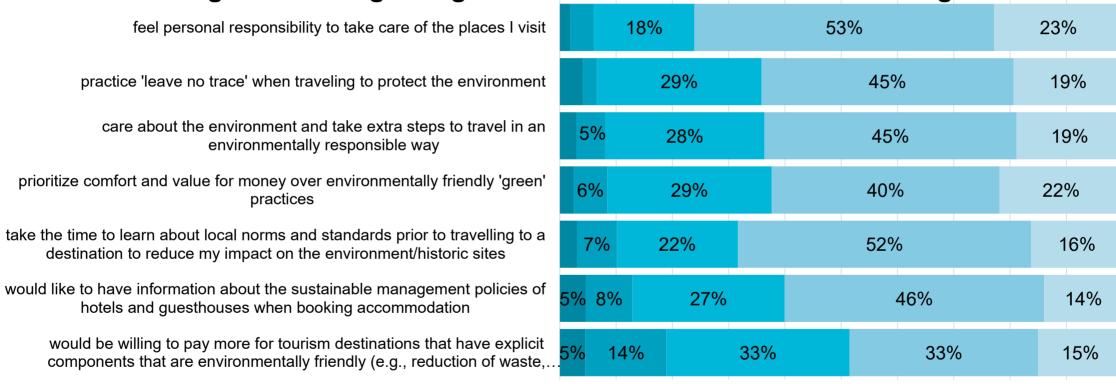
When I travel. I want to understand the destination and 'live like a local' through informed decisions



Strongly disagree ■ Disagree ■ Neither agree nor disagree Strongly agree Aaree

Canada Long Distance Travelers: Sustainability and Travel Responsibility Statements

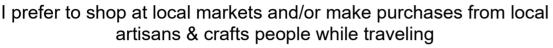
Agreement Regarding Sustainable Practices While Traveling



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

Canada Long Distance Travelers: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling

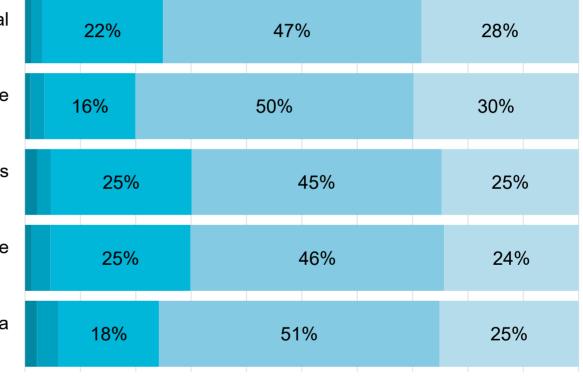


I would like to be offered locally sourced food and drink where possible

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



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Canada Nat Rep: Sustainability and Travel Responsibility Statements

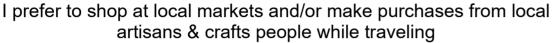
Agreement Regarding Sustainable Practices While Traveling



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

Canada Nat Rep: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling



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

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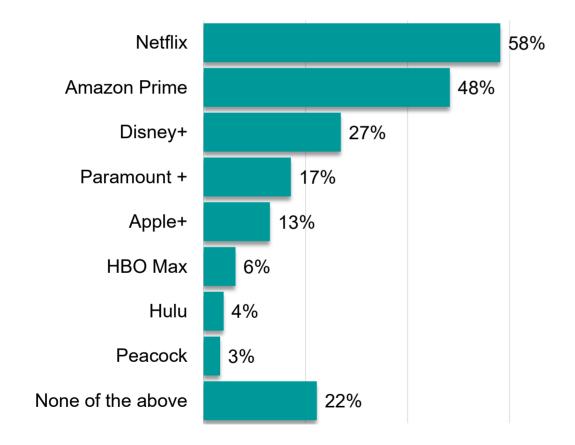
When I travel, I want to understand the destination and 'live like a local' through informed decisions



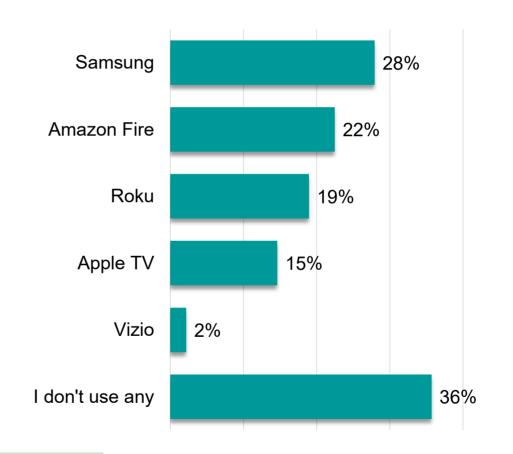
■ Strongly disagree
■ Disagree
■ Neither agree nor disagree
■ Agree
■ Strongly agree

Canada Media Consumption

Streaming Platforms Used Weekly

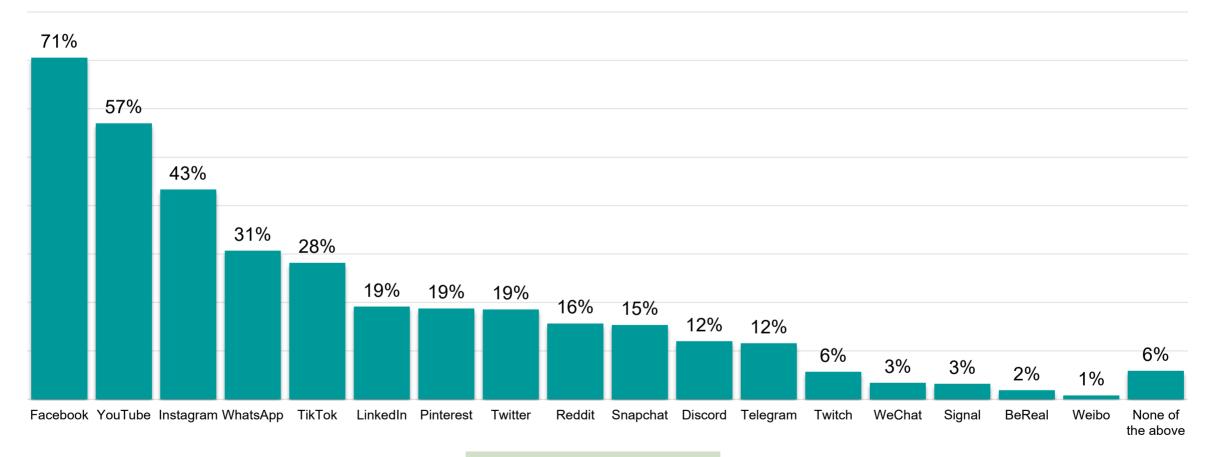


Connected Device Used



Canada Media Consumption

Social Media Platforms Used Weekly



Canada Media Consumption

Travel Destination Source of Awareness

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TV Program/Documentary	20%		
Online	32%		
Radio	8%		
TV commercials	24%		
Newspaper	10%		
Friends/Family	46%		
Social Media	34%		
YouTube	35%		
Out of Home Advertising (e.g., poster billboards, bus shelter advertisements, etc.)	7%		
Email	15%		
I don't recall	14%		

Actions Taken After Seeing an Ad for a Destination

I go to the destination's website	30%		
I search for information about the destination online	39%		
I look up the destination on social media	22%		
I talk to friends/family about the destination	33%		
I book travel to the destination almost immediately	10%		
I don't do anything	19%		
None of the above	9%		