



Vision Insights Canada Traveler Profiles Q2 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., 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

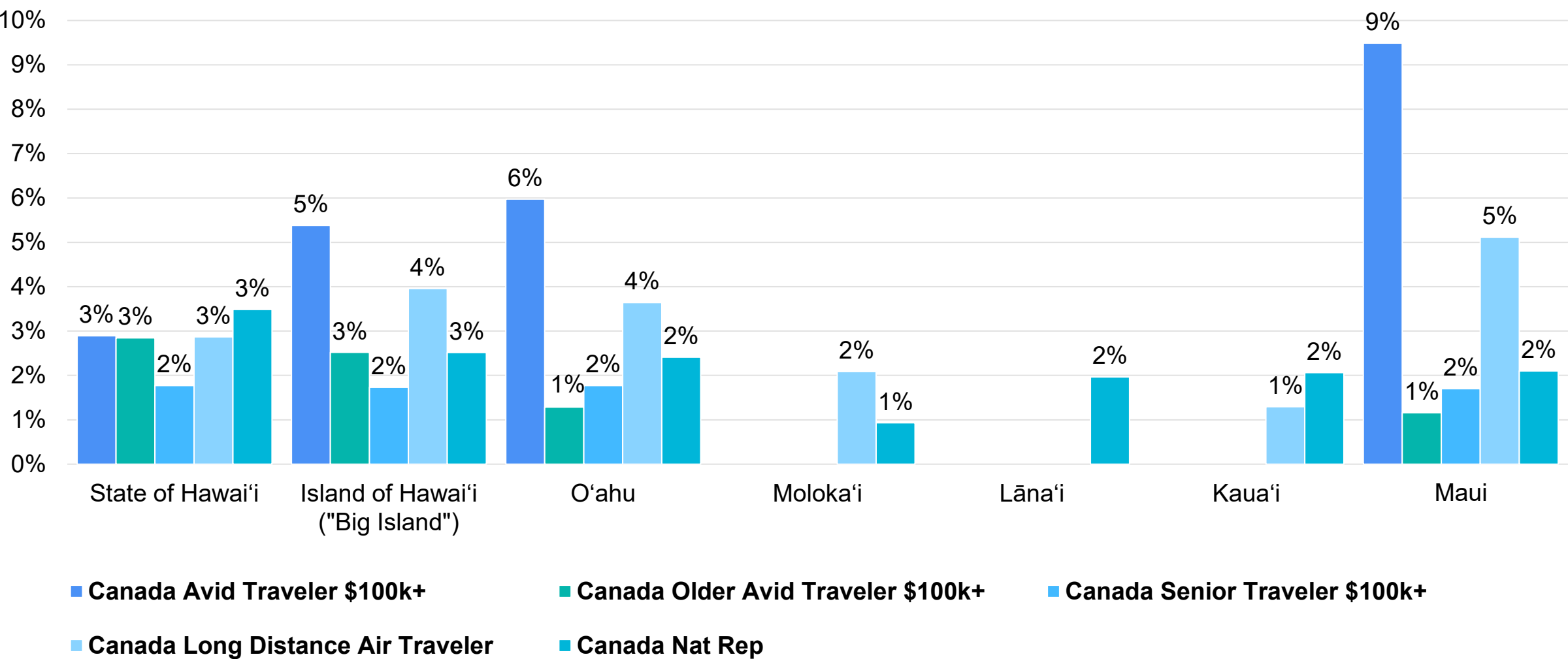
Older Avid Traveler \$100k+

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

Senior Traveler \$100k+

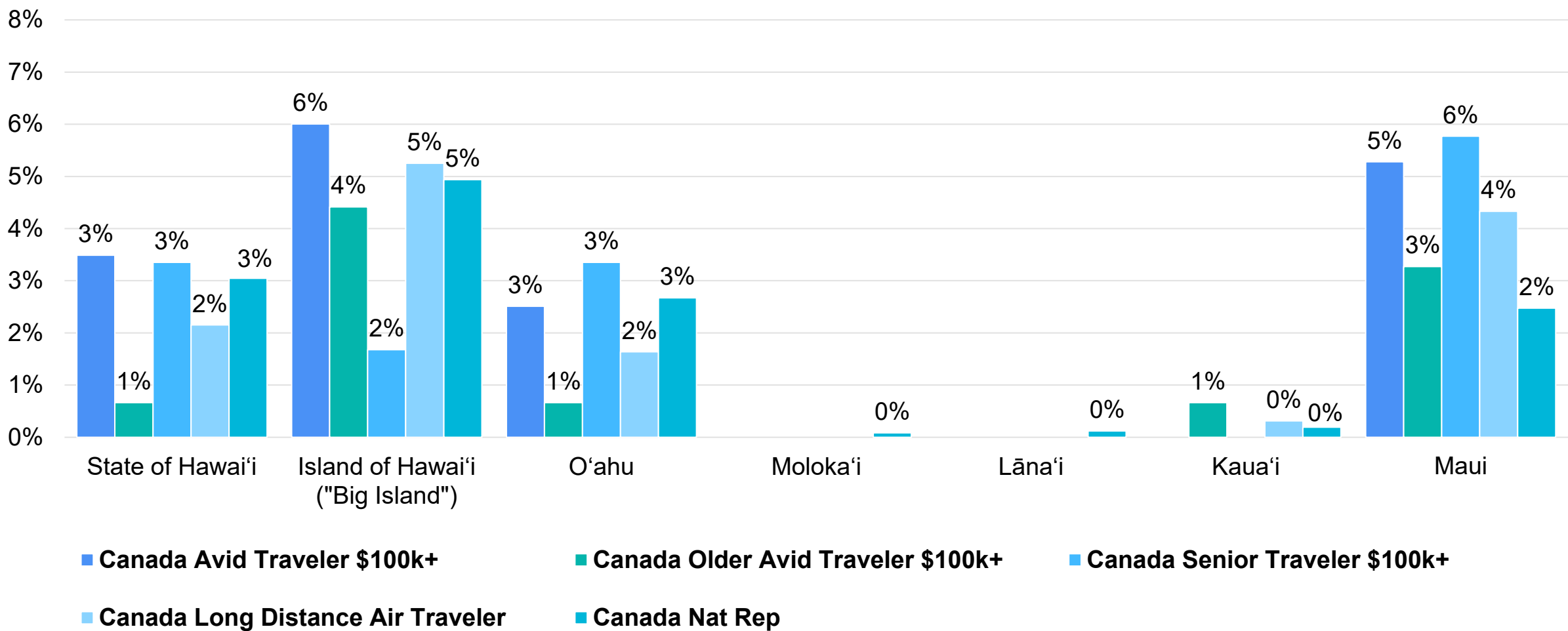
- Gross household income is \$100k+
- Age is 64+
- Been to Hawai'i (ever)

Canada - Leisure Trip in Past 12 Months



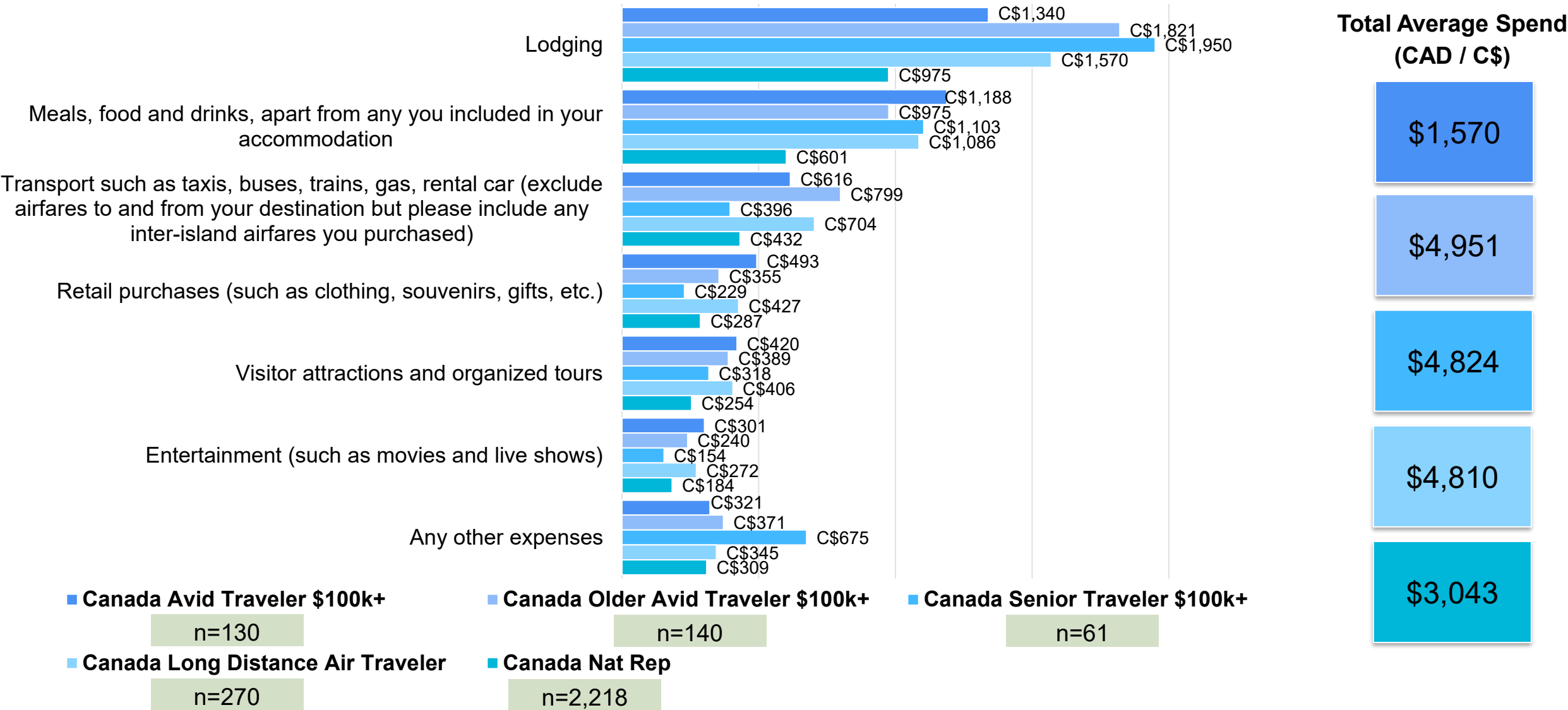
Sample Min. n=50

Canada - Next Destination for Leisure Trip



Sample Min. n=75

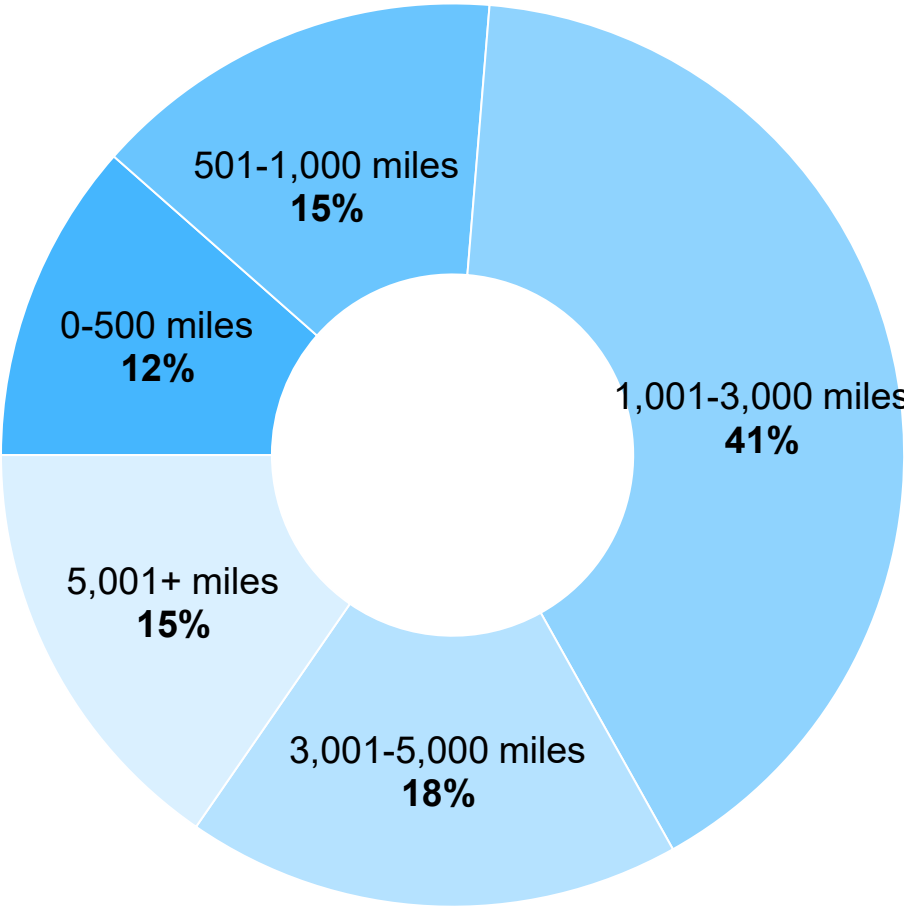
Canada - Total Annual Holiday Spend



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.

Canada Avid Travelers \$100k+: Annual Vacation

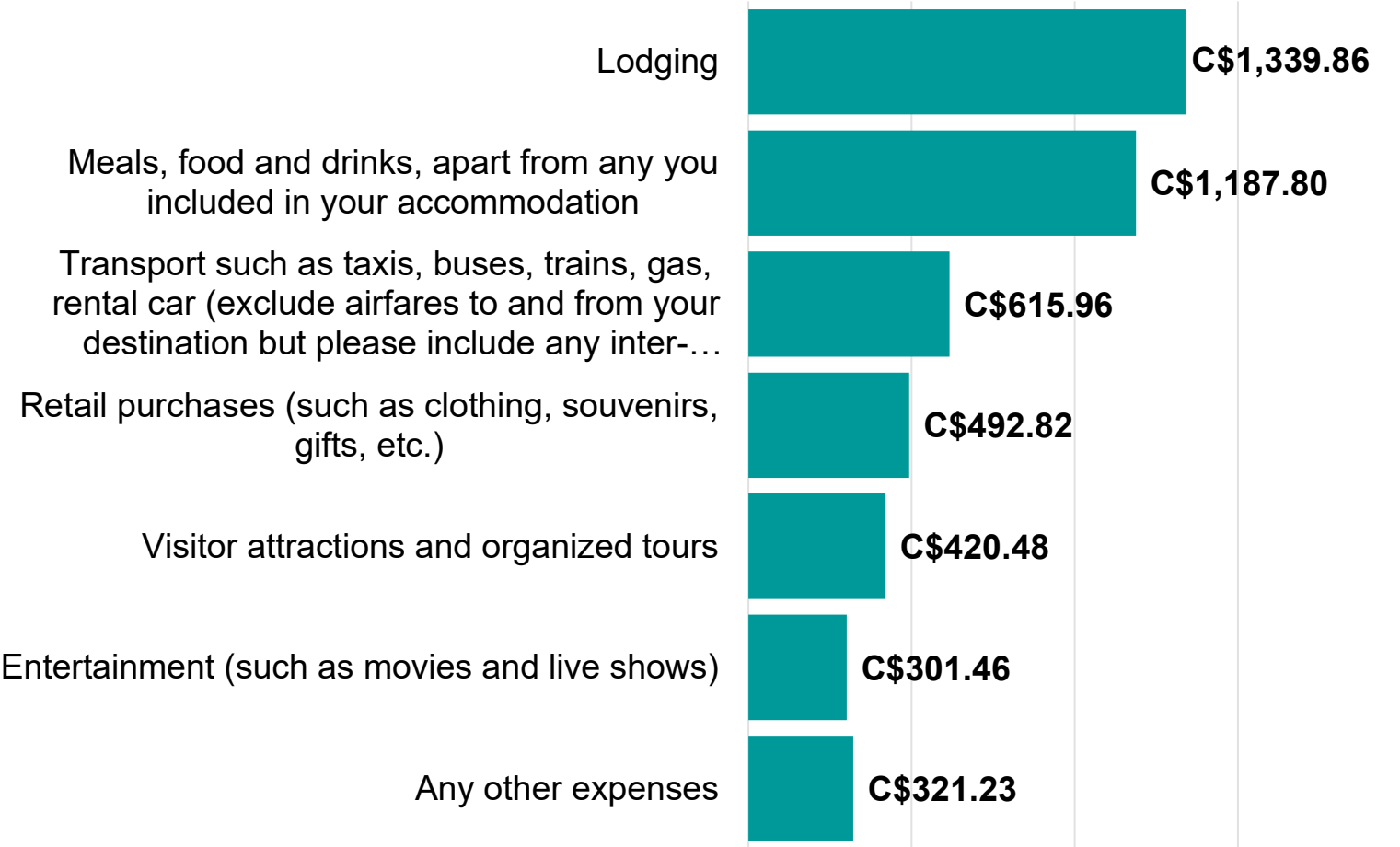
Distance Travelled on Annual Vacation



Sample Size: n=130

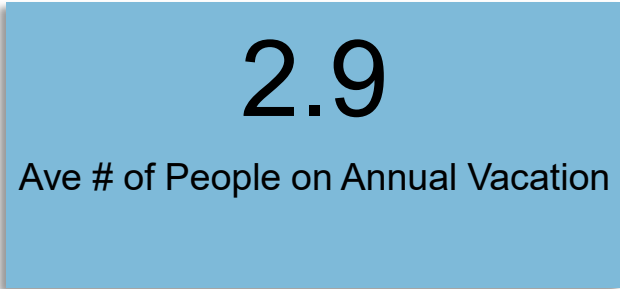
Canada Avid Travelers \$100k+: Annual Vacation

Average Spend



Sample Size: n=130

Spend Per Person Per Day

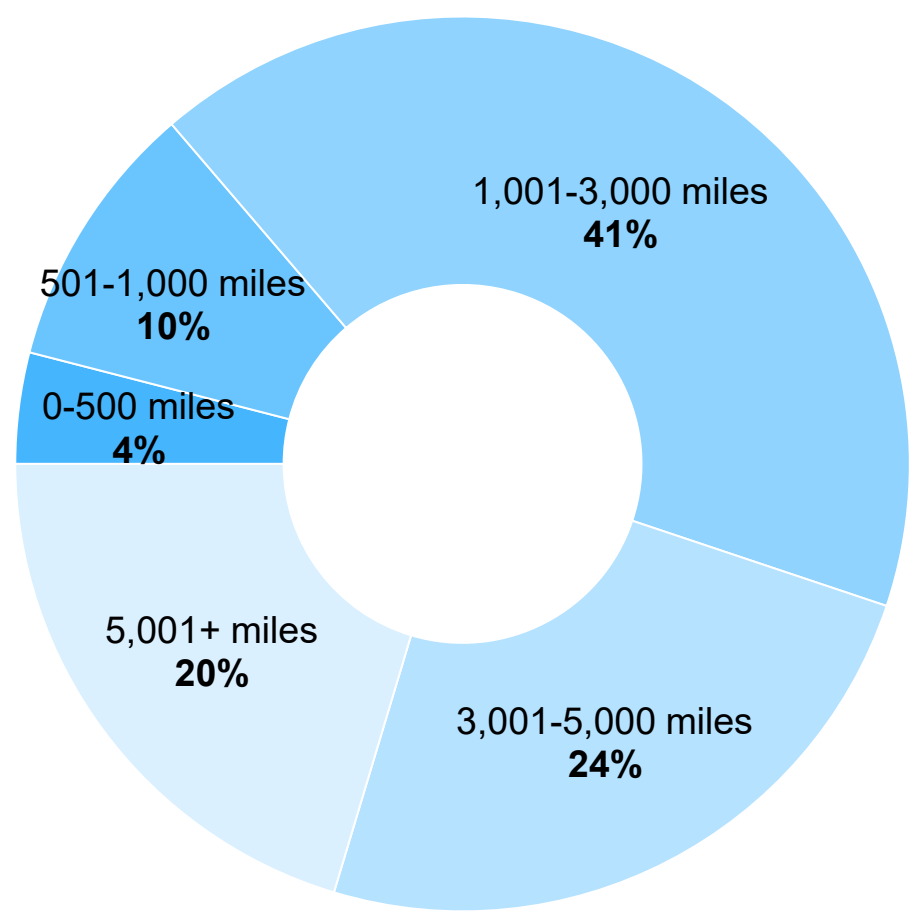


C\$229.36

Ave. Per Person Per Day Spend

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

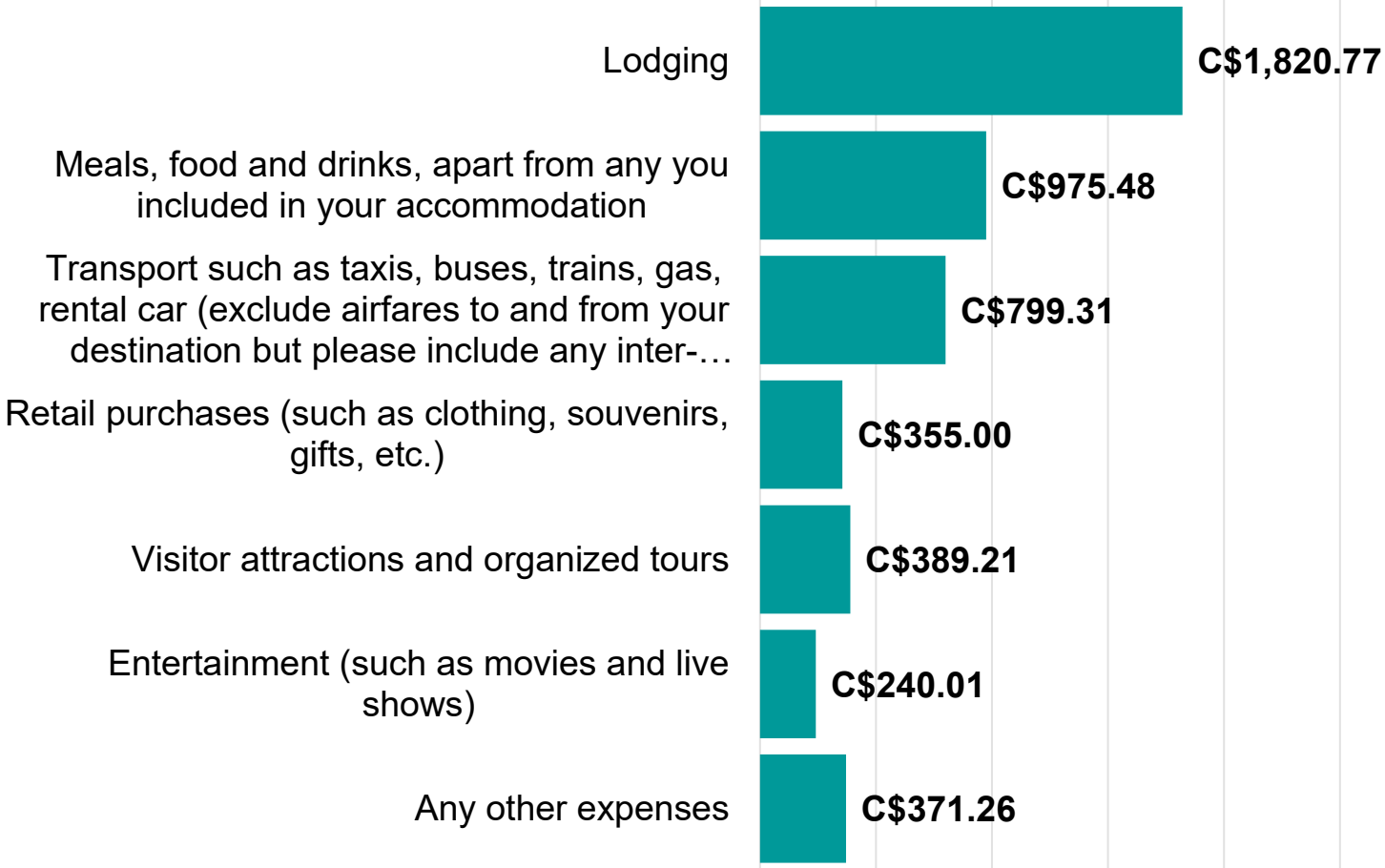
Distance Travelled on Annual Vacation



Sample Size: n=140

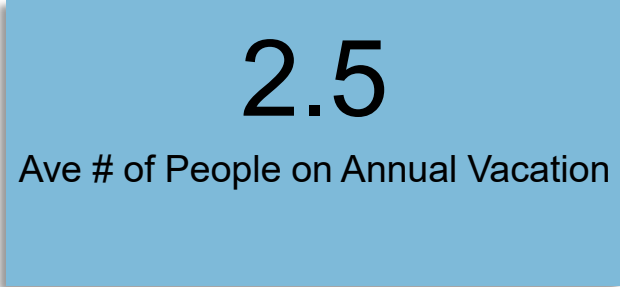
Canada Older Avid Travelers \$100k+: Annual Vacation

Average Spend



Sample Size: n=140

Spend Per Person Per Day

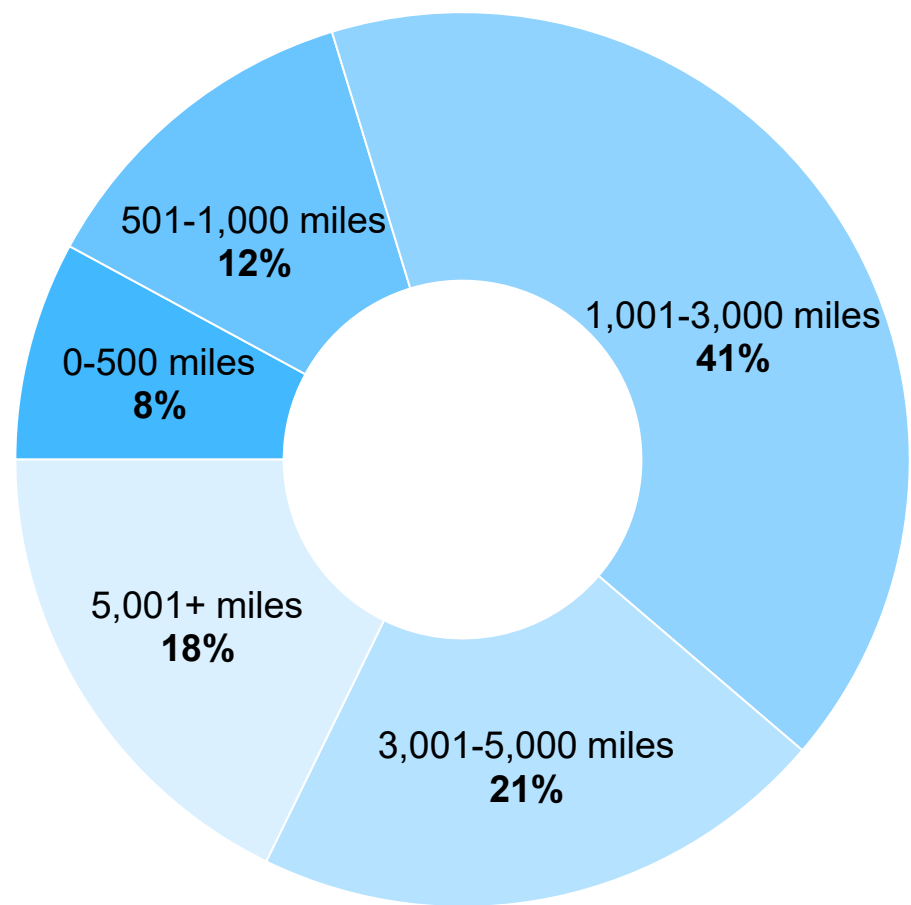


C\$214.78

Ave. Per Person Per Day Spend

Canada Long-Distance Travelers: Annual Vacation

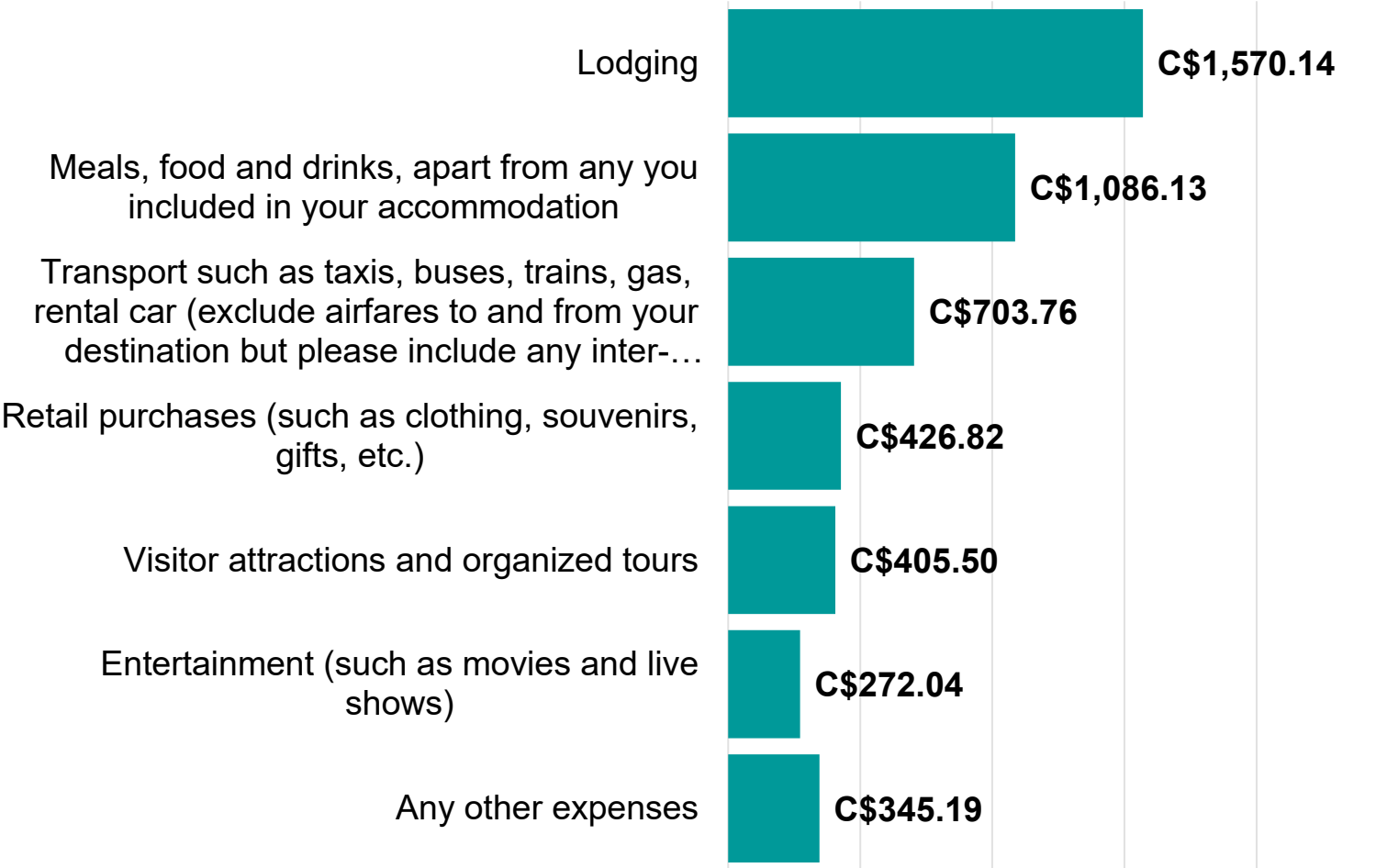
Distance Travelled on Annual Vacation



Sample Size: n=270

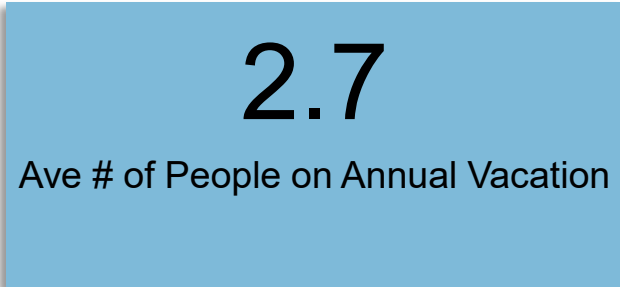
Canada Long-Distance Travelers: Annual Vacation

Average Spend



Sample Size: n=270

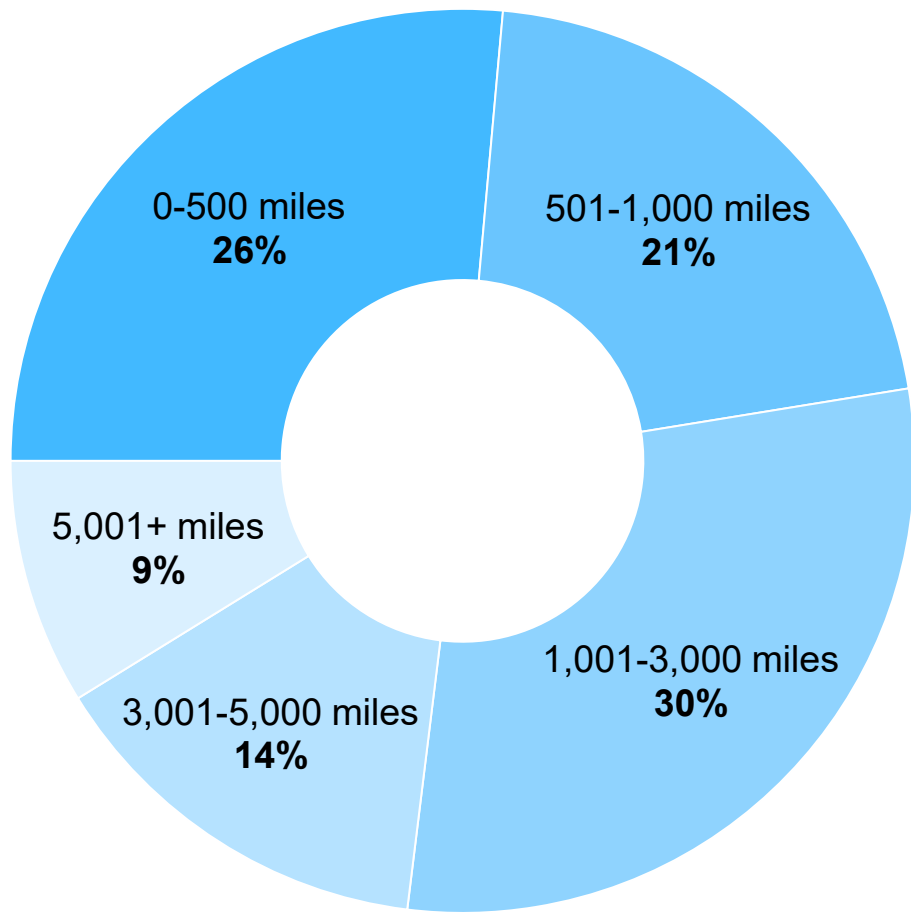
Spend Per Person Per Day



C\$220.37
Ave. Per Person Per Day Spend

Canada Nat Rep: Annual Vacation

Distance Travelled on Annual Vacation



Sample Size: n=2,218

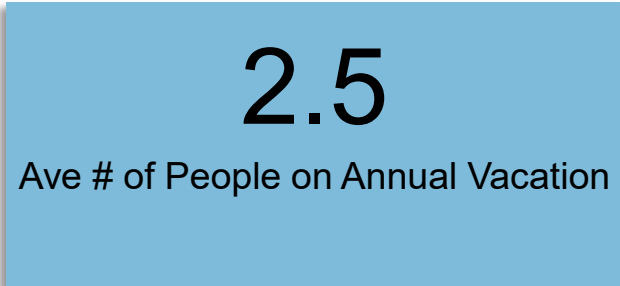
Canada Nat Rep: Annual Vacation

Average Spend



Sample Size: n=2,218

Spend Per Person Per Day



C\$174.18
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

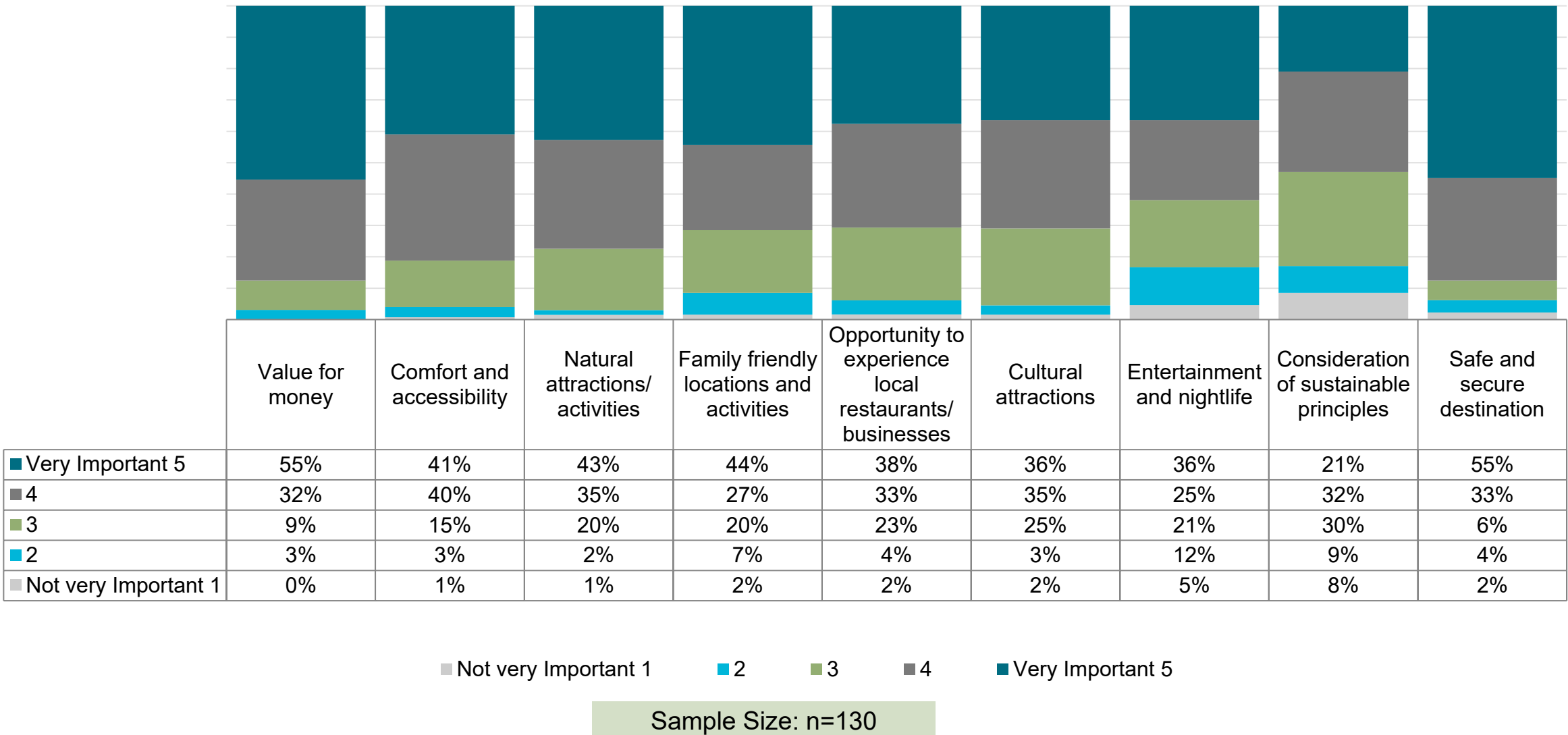
n=140

n=61

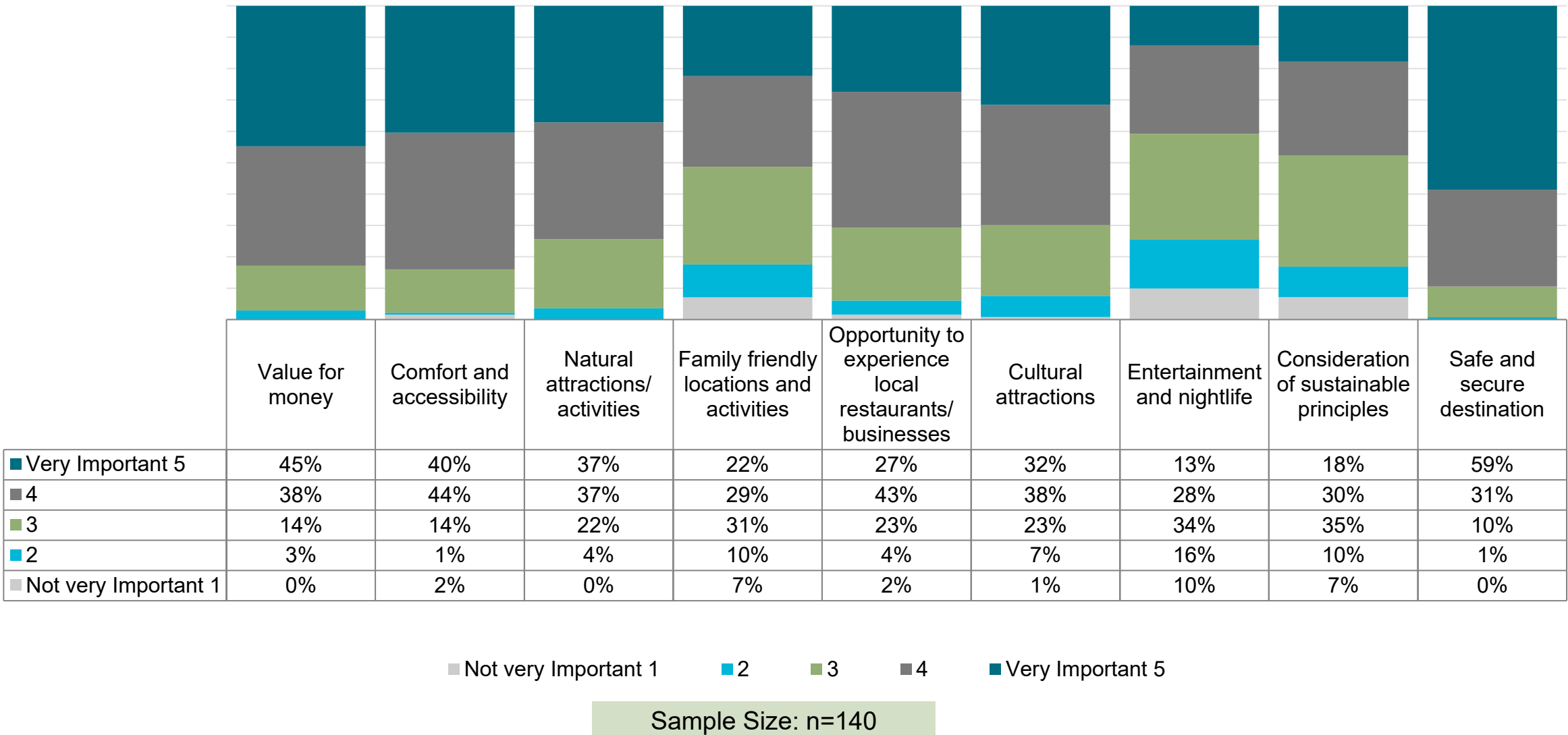
n=270

n=2,218

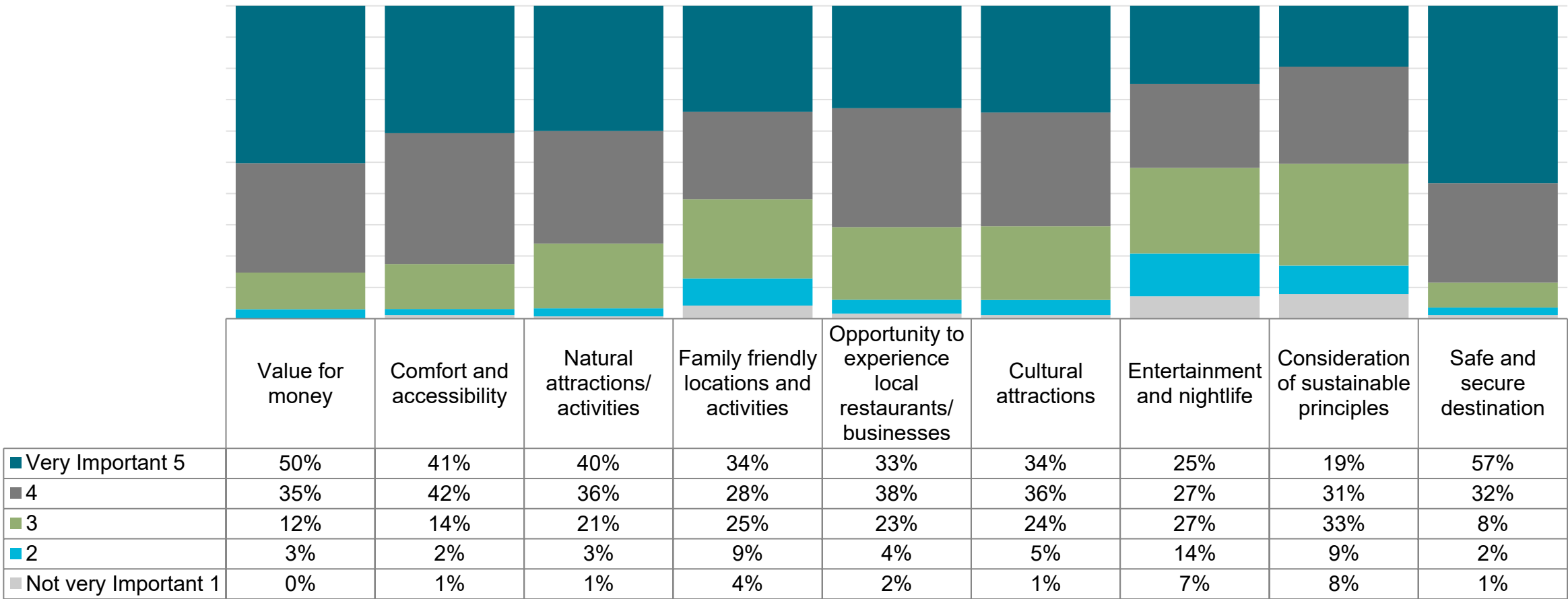
Canada Avid Travelers \$100k+: Importance of Travel Factors



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



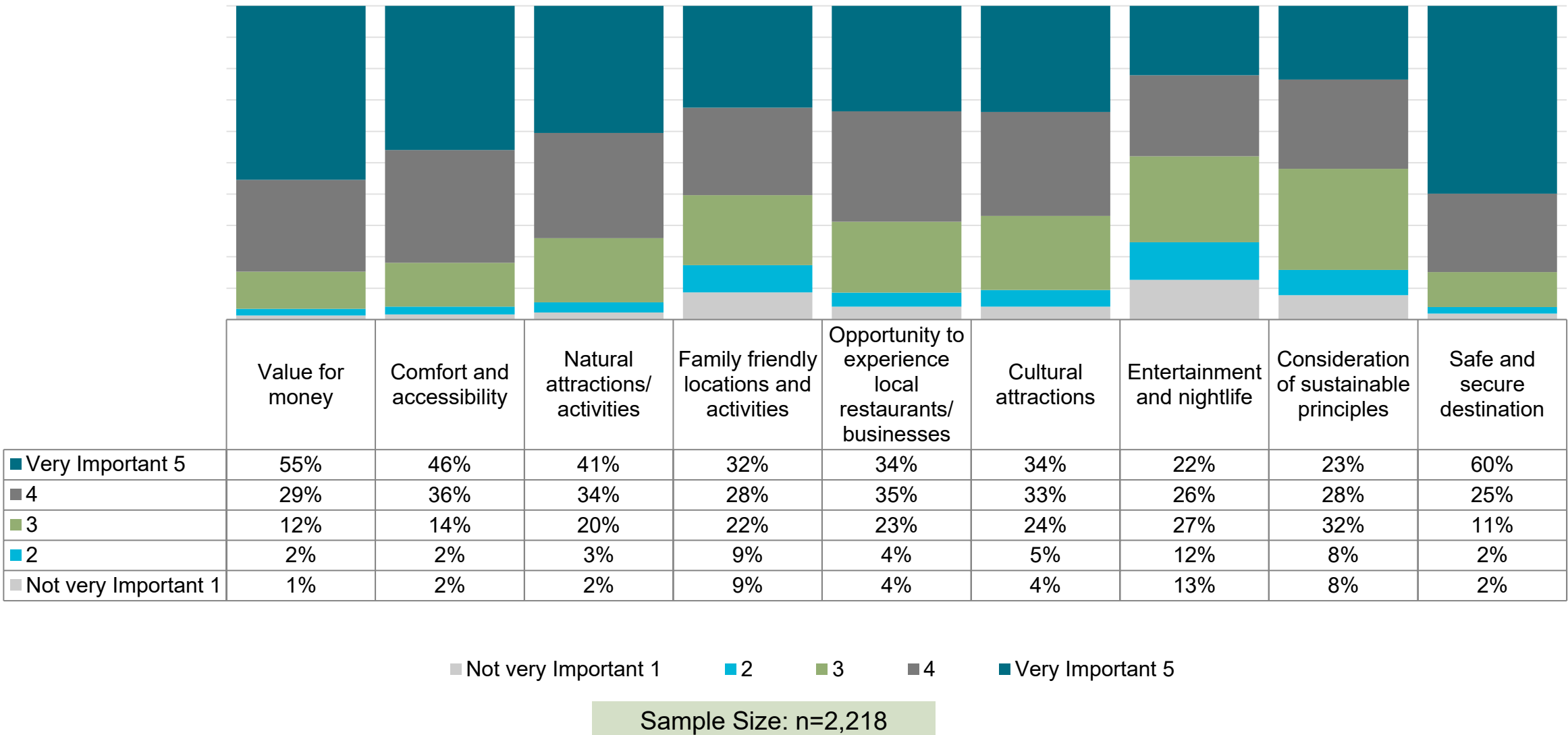
Canada Long Distance Travelers: Importance of Travel Factors



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

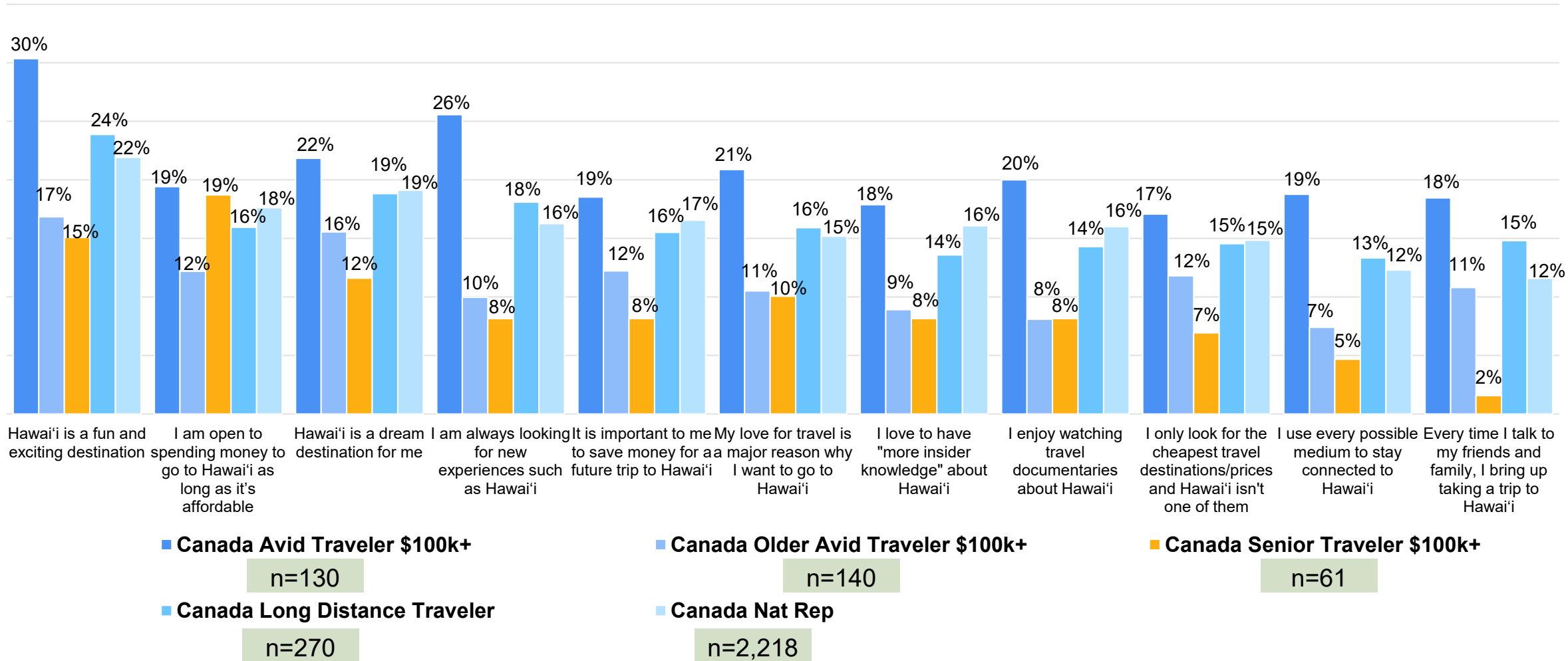
Sample Size: n=270

Canada Nat Rep: Importance of Travel Factors



Canada - Hawai'i as an Aspirational Destination

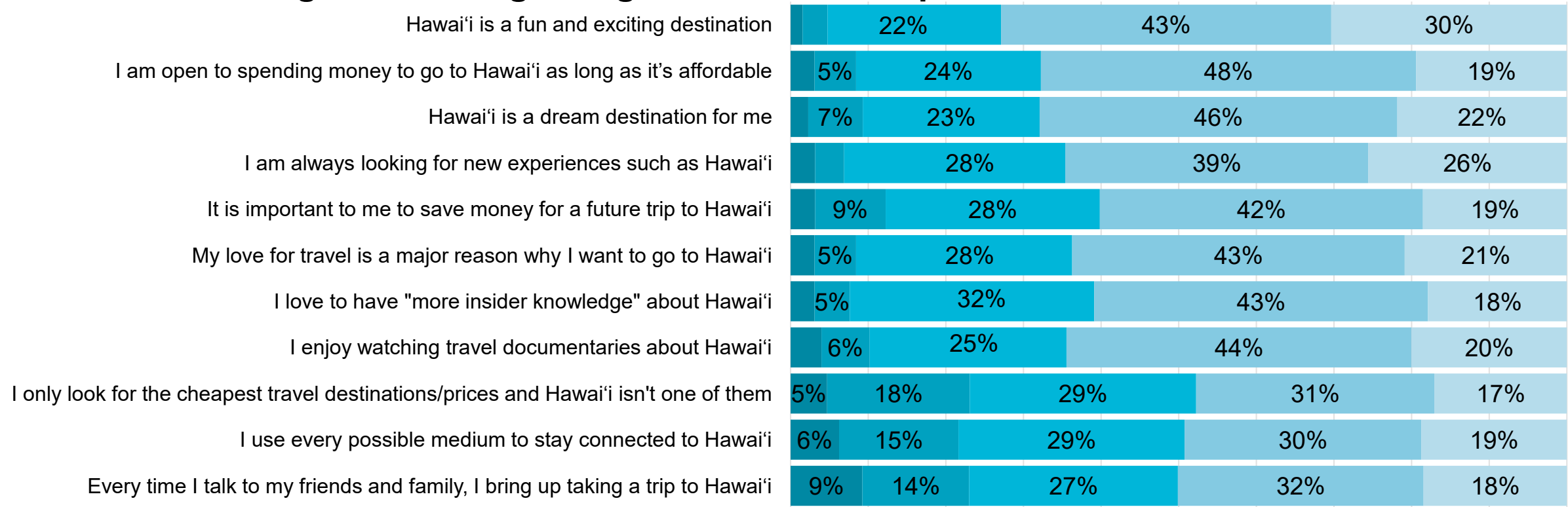
Agreement Regarding Hawai'i as a Travel Destination (Strongly Agree)



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

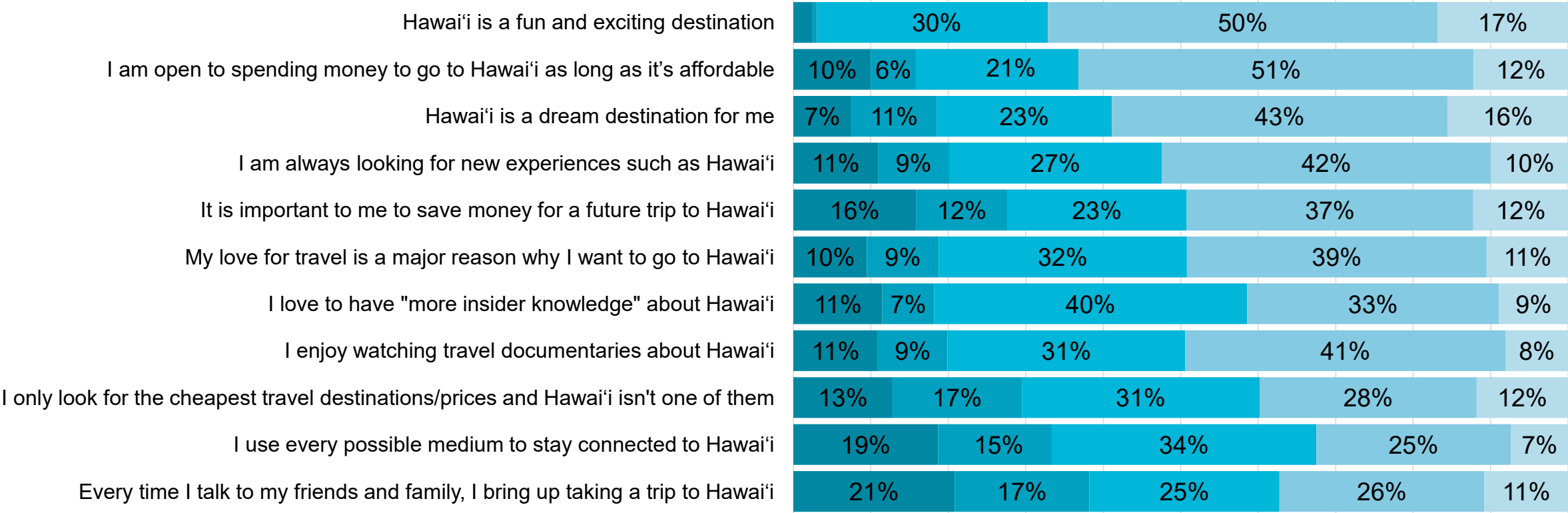


■ Strongly disagree ■ Disagree ■ Neither agree nor disagree ■ Agree ■ Strongly agree

Sample Size: n=130

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

Agreement Regarding Hawai'i as an Aspirational Destination

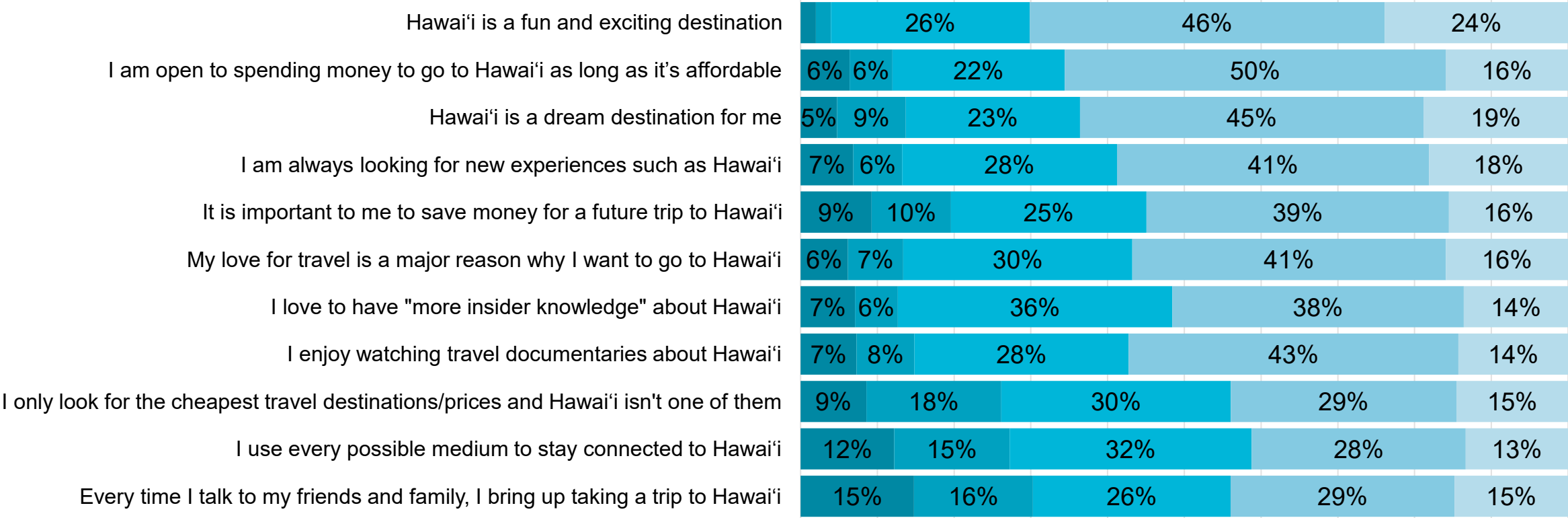


■ Strongly disagree ■ Disagree ■ Neither agree nor disagree ■ Agree ■ Strongly agree

Sample Size: n=140

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

Agreement Regarding Hawai'i as an Aspirational Destination

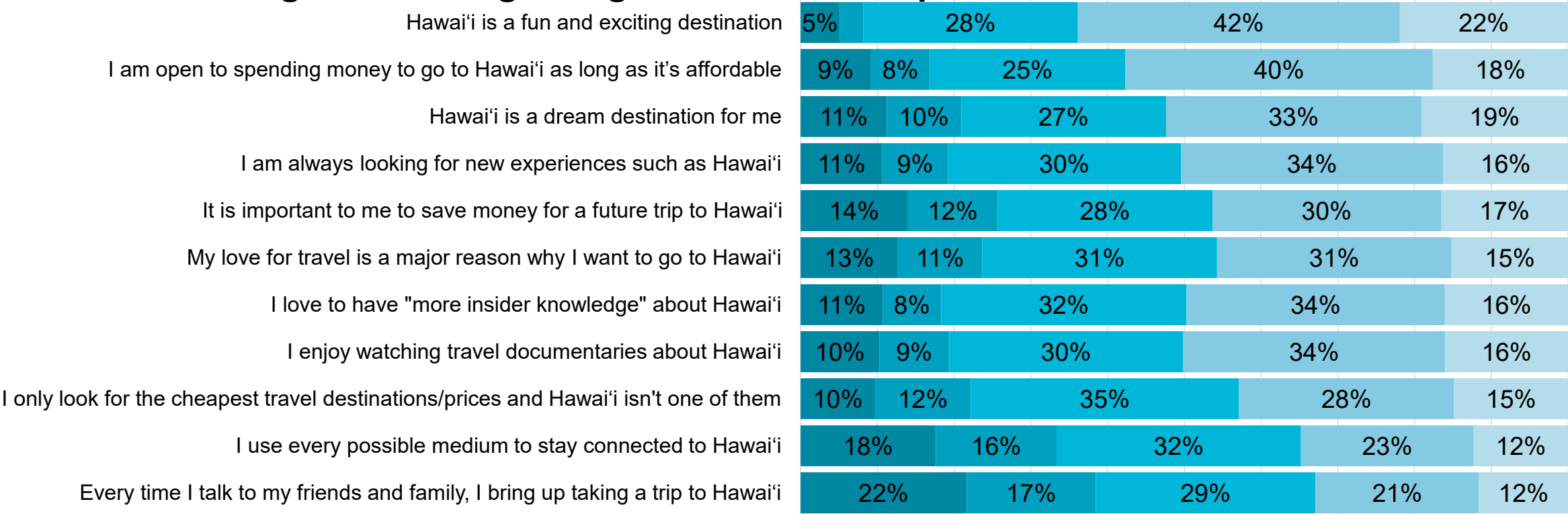


■ Strongly disagree ■ Disagree ■ Neither agree nor disagree ■ Agree ■ Strongly agree

Sample Size: n=270

Canada Nat Rep: Hawai'i as an Aspirational Destination

Agreement Regarding Hawai'i as an Aspirational Destination



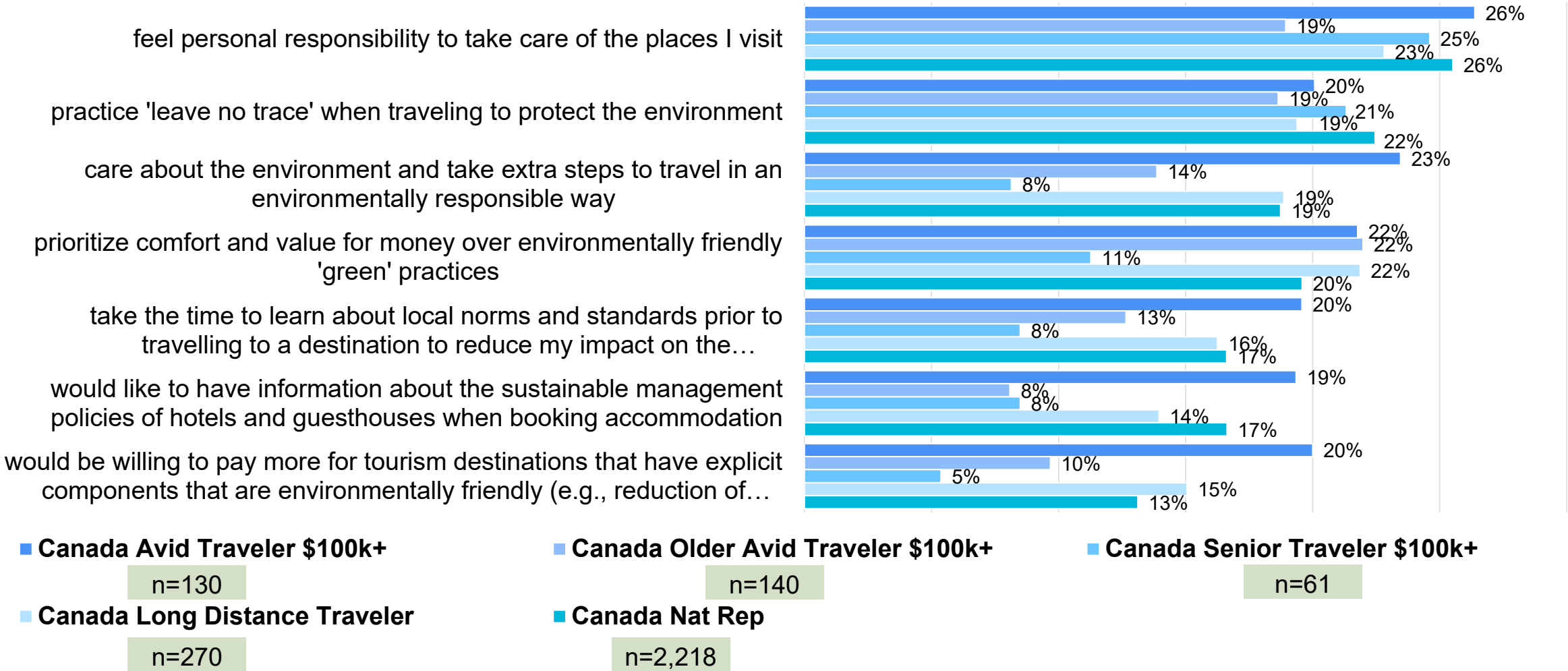
■ Strongly disagree ■ Disagree ■ Neither agree nor disagree ■ Agree ■ Strongly agree

Sample Size: n=2,218

Canada - Sustainability and Travel Responsibility Statements

Agreement Regarding Sustainable Practices While Traveling

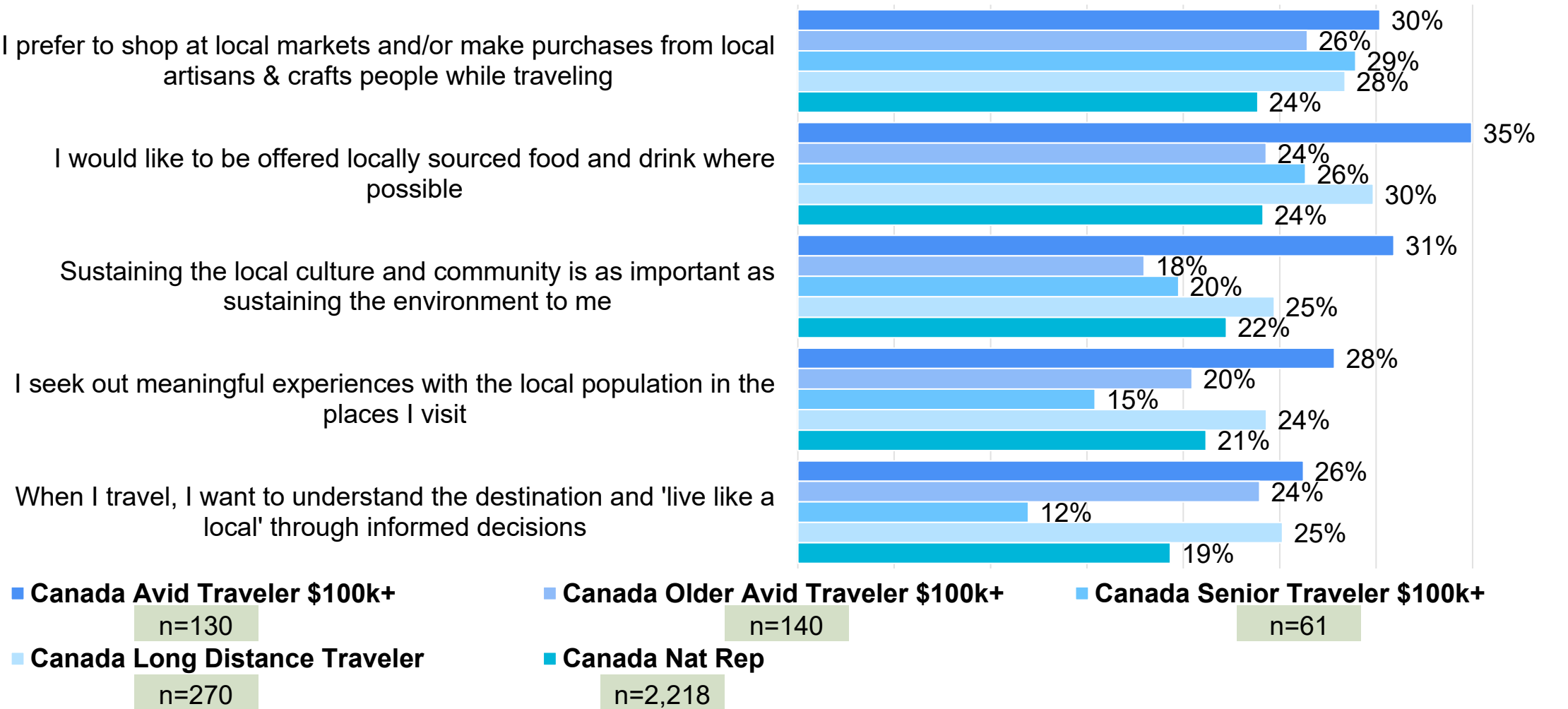
(Strongly Agree)



Canada - Sustainability and Travel Responsibility Statements

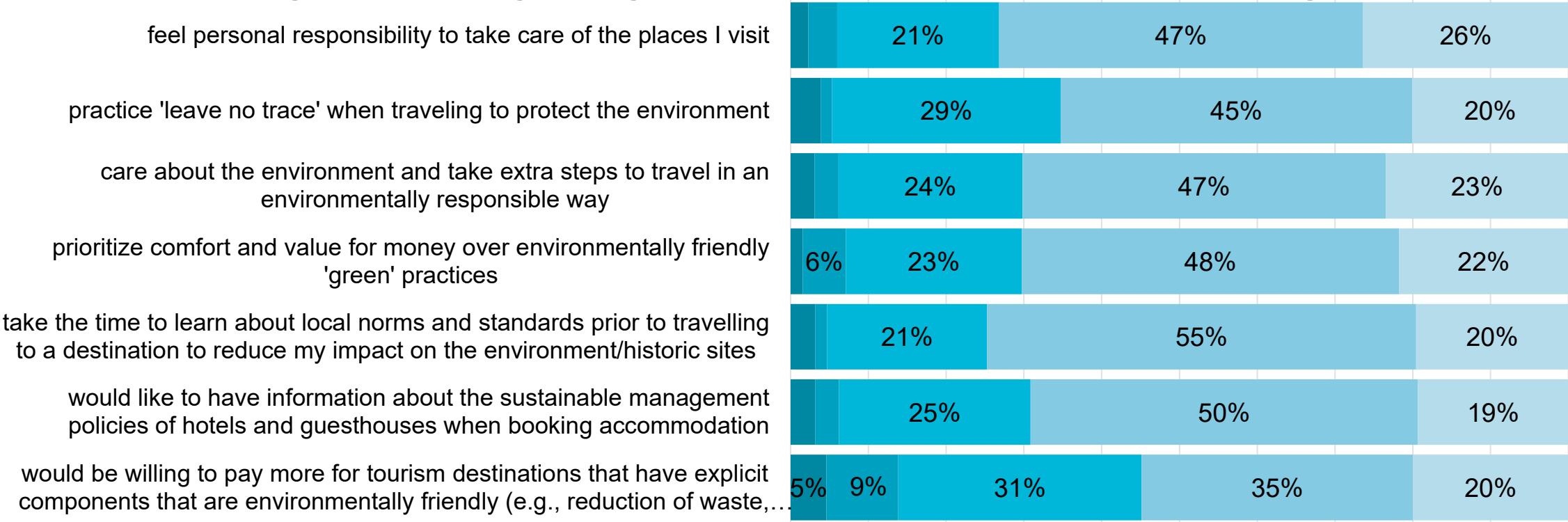
Agreement Regarding Sustaining Local Culture While Traveling

(Strongly Agree)



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

Agreement Regarding Sustainable Practices While Traveling

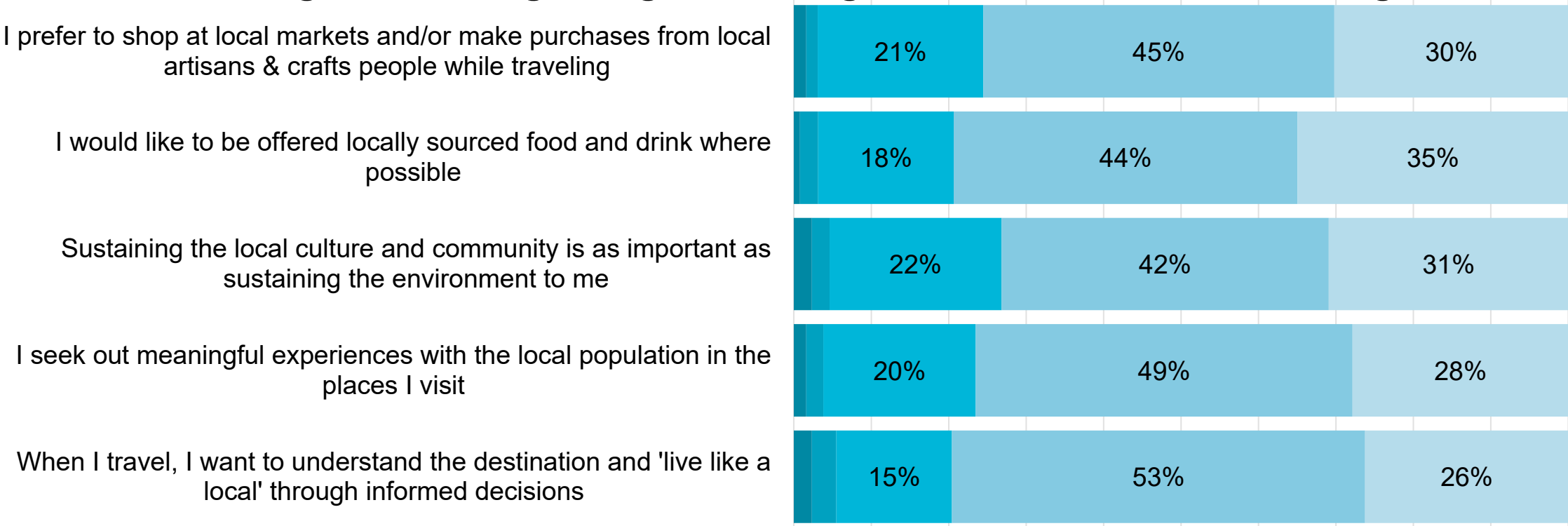


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Sample Size: n=130

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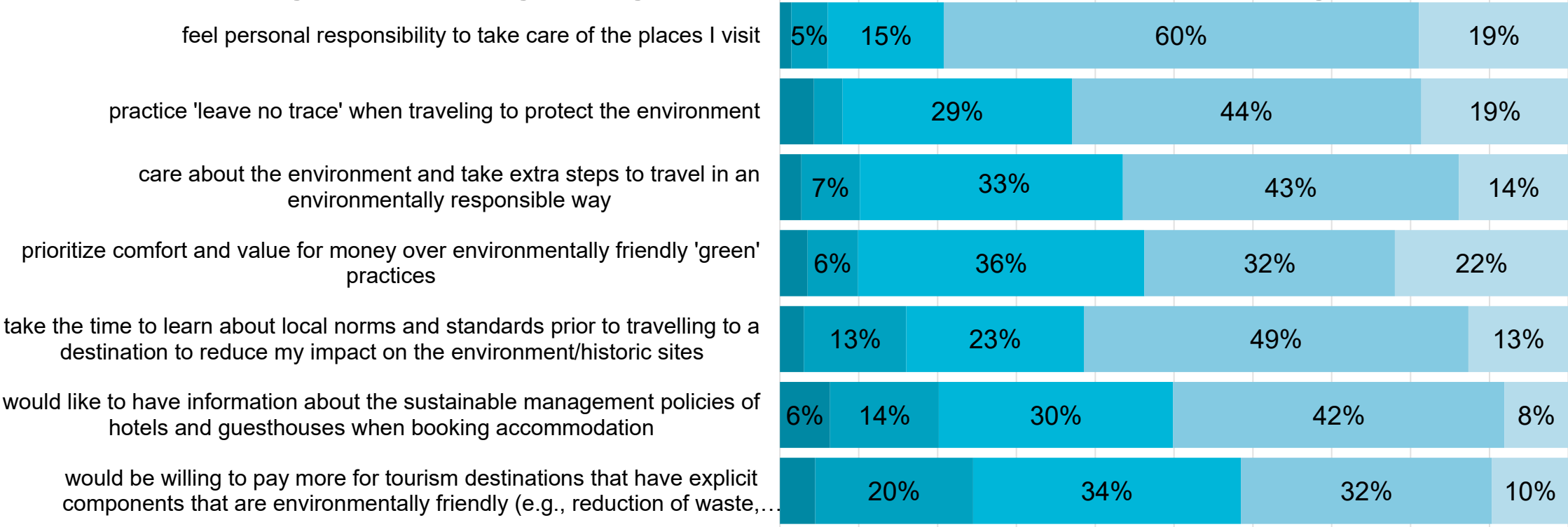


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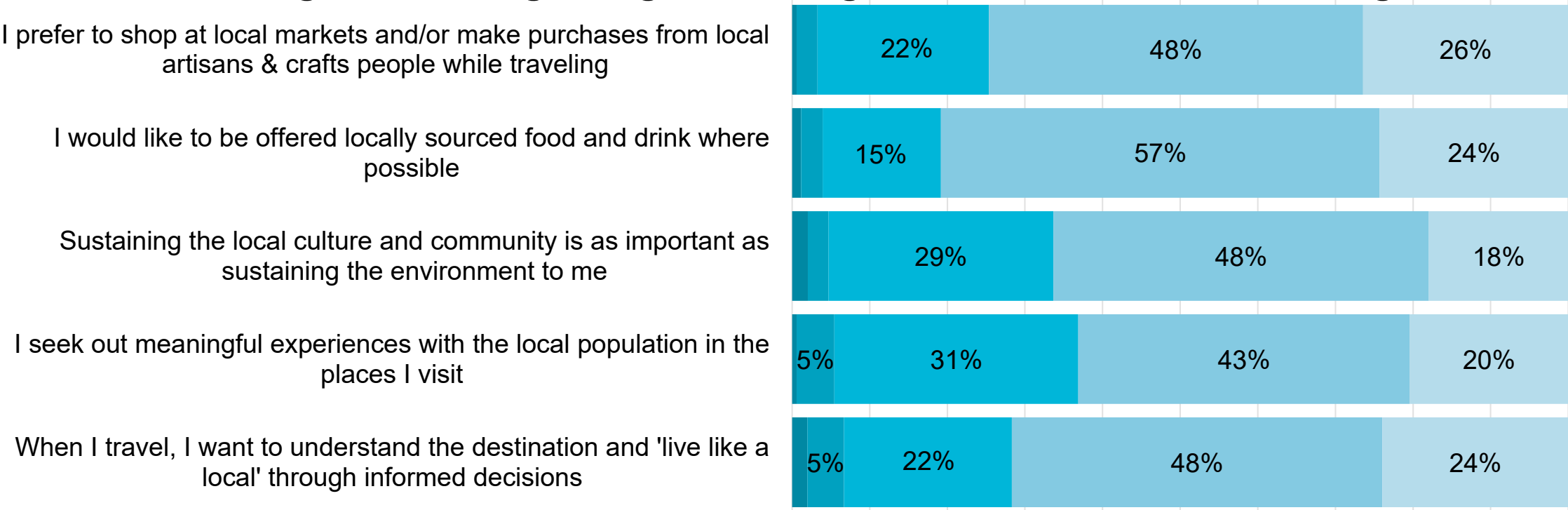


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Sample Size: n=140

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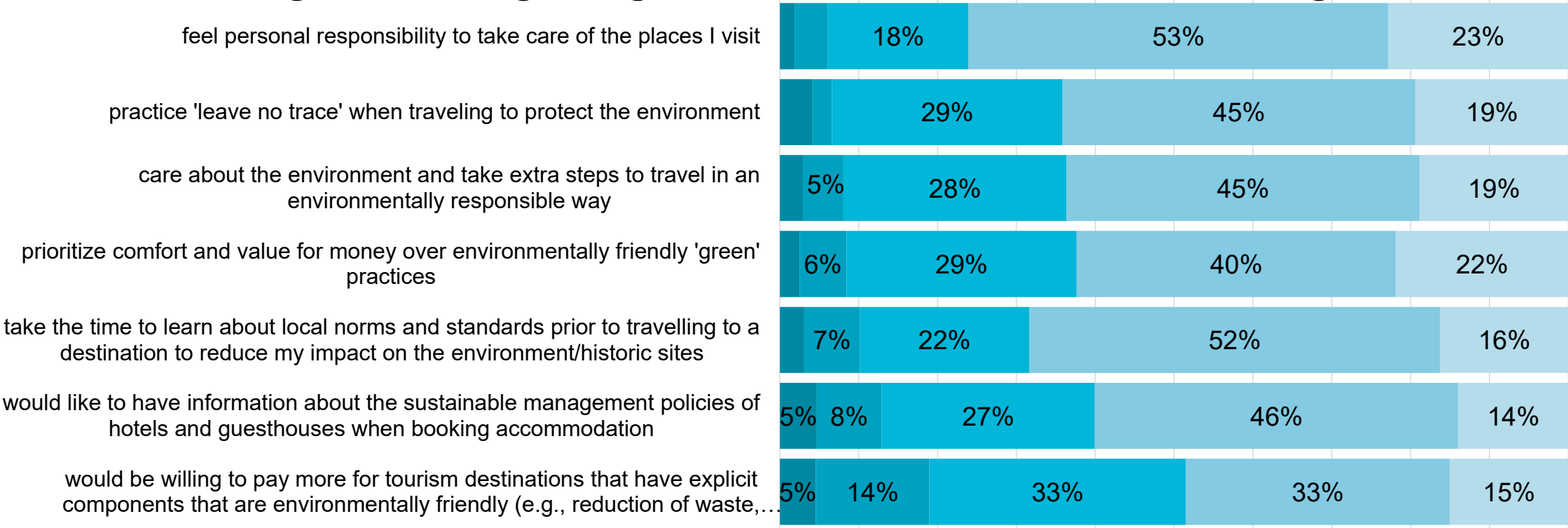


■ Strongly disagree ■ Disagree ■ Neither agree nor disagree ■ Agree ■ Strongly agree

Sample Size: n=140

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

Sample Size: n=270

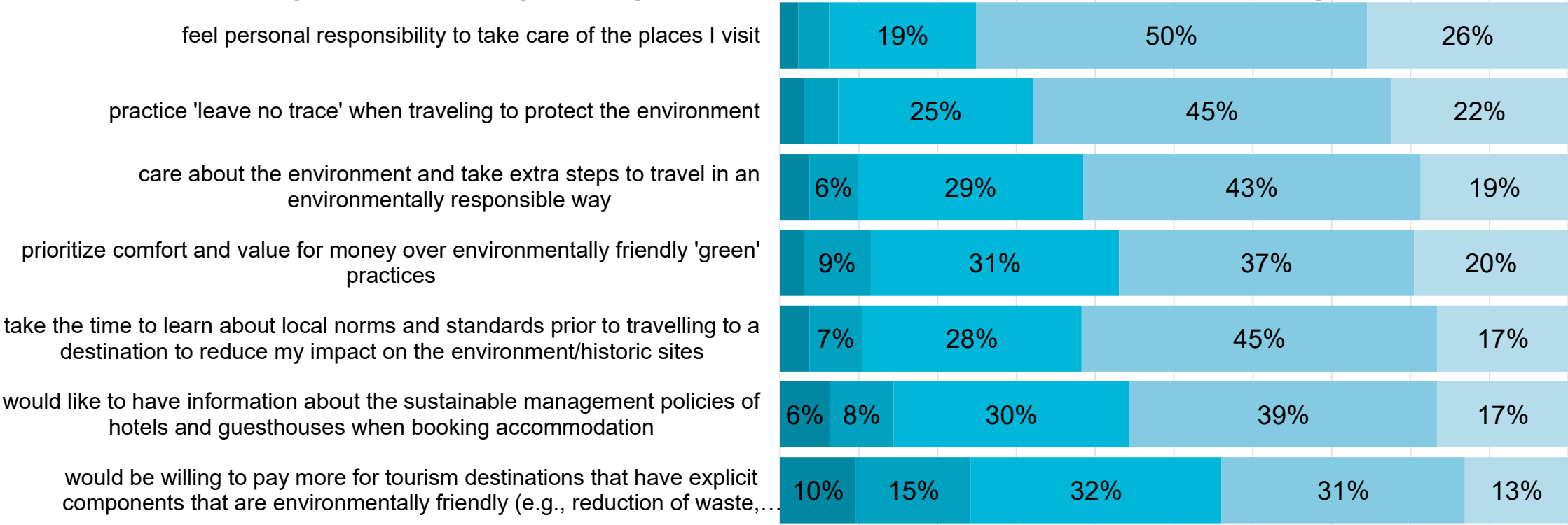
Canada Long Distance Travelers: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling



Canada 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=2,218

Canada Nat Rep: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling

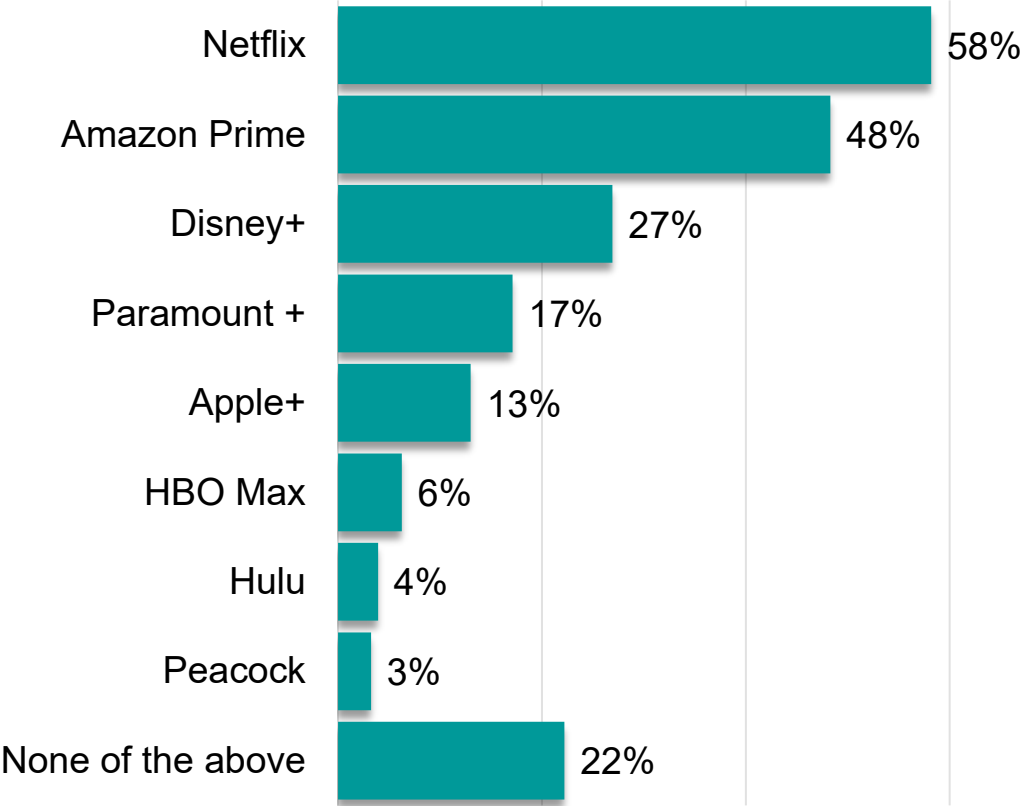


■ Strongly disagree ■ Disagree ■ Neither agree nor disagree ■ Agree ■ Strongly agree

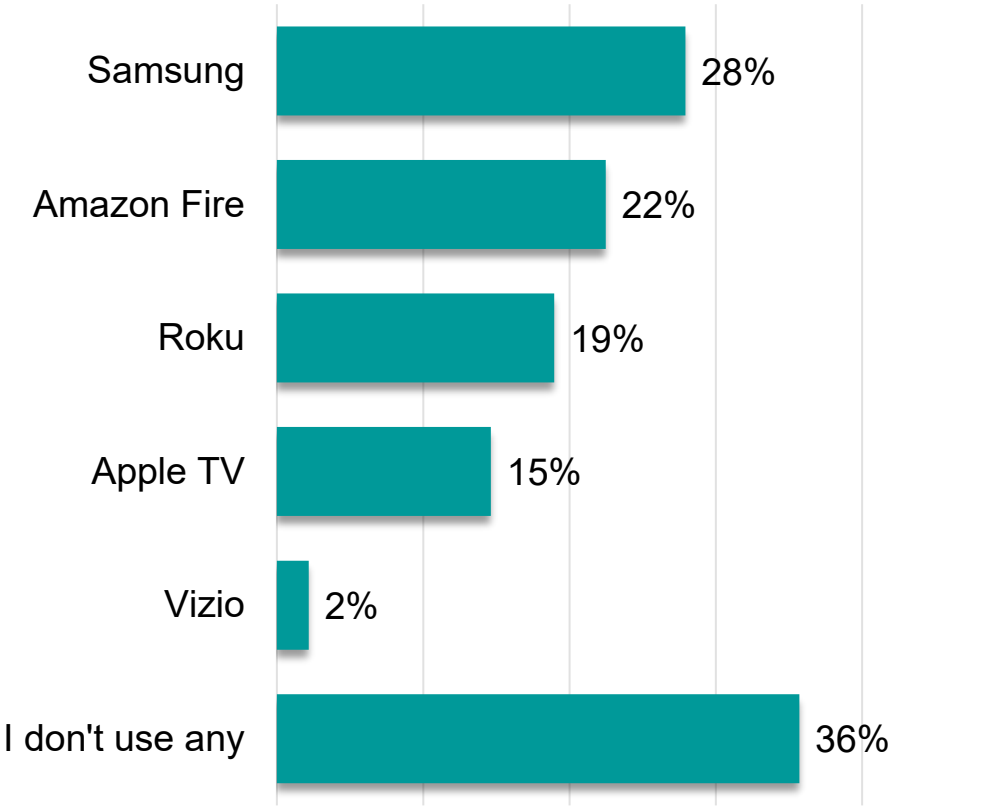
Sample Size: n=2,218

Canada Media Consumption

Streaming Platforms Used Weekly



Connected Device Used

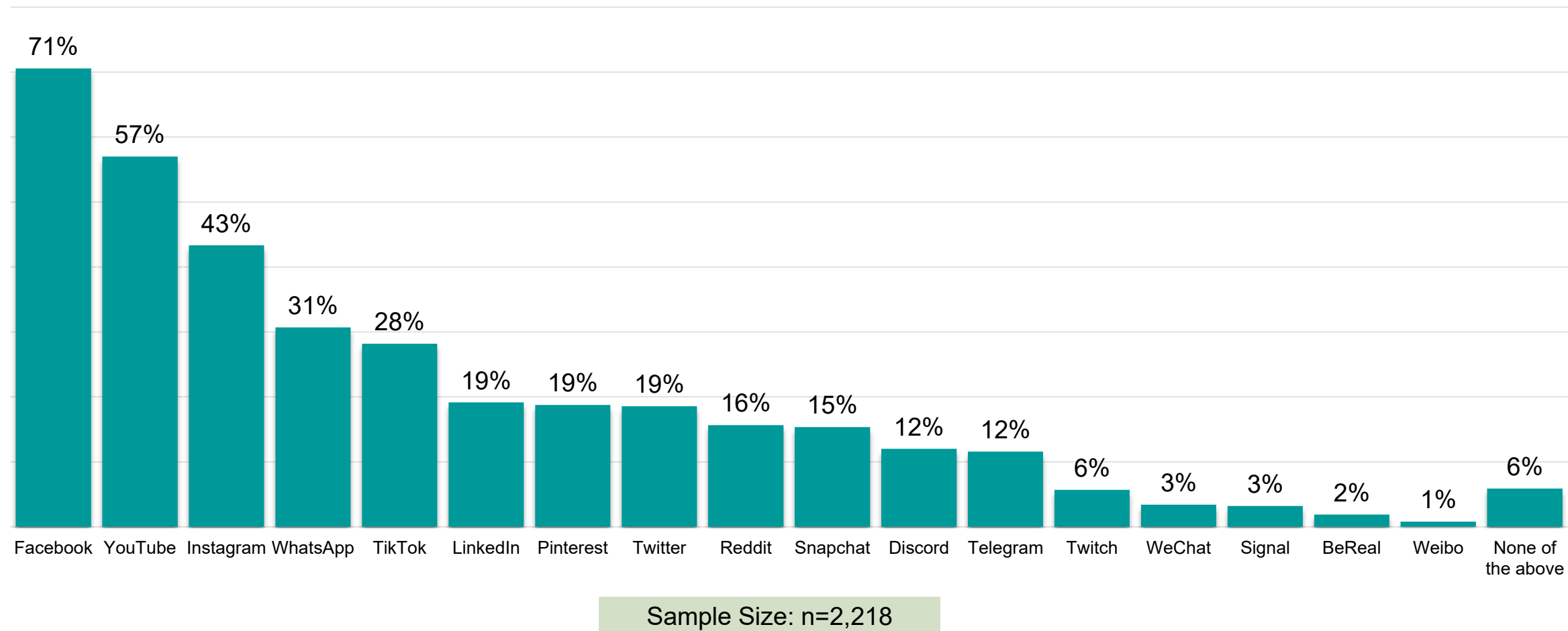


Sample Size: n=2,218

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

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

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%

Sample Size: n=2,218