



# **Vision Insights**

## **Canada Traveler Profiles**

### **Q1 2024**

April 22, 2024



STATE OF HAWAII • 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
- For the Canada Profiles, the sample size for the Senior Traveler \$100k+ segment is below the minimum sample size requirement (n=75) 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

# 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

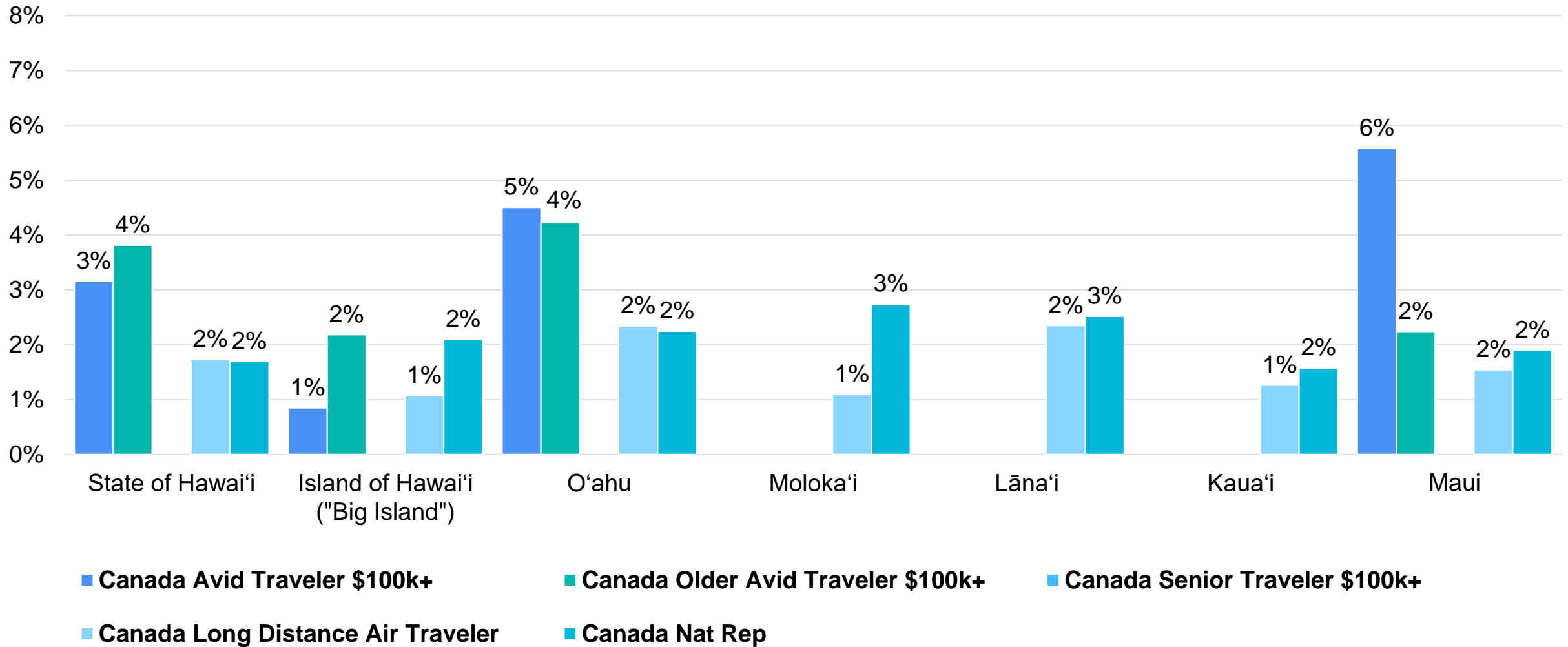
## **Older Avid Traveler \$100k+**

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

## **Senior Traveler \$100k+**

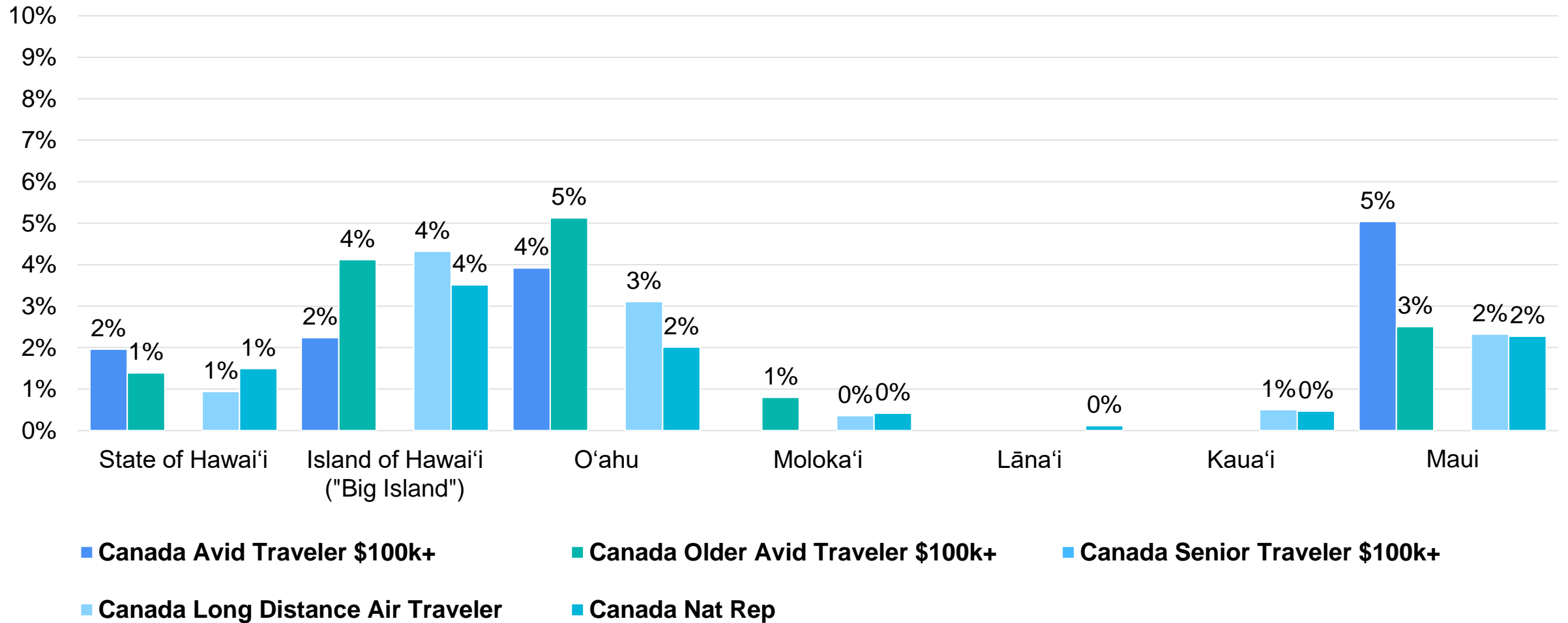
- Gross household income is \$100k+
- Age is 64+
- Been to Hawai'i (ever)

# Canada - Leisure Trip in Past 12 Months



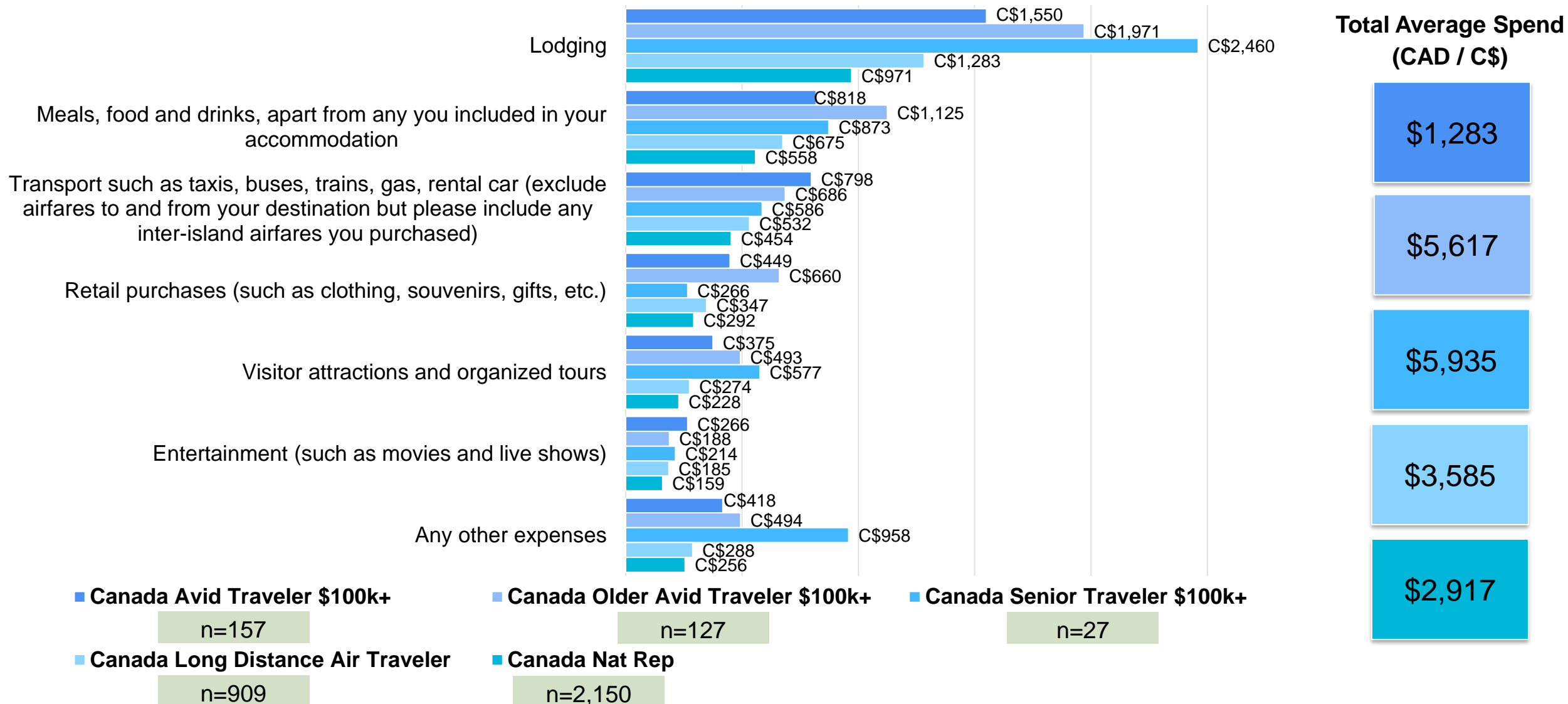
Sample Min. n=50

# Canada - Next Destination for Leisure Trip



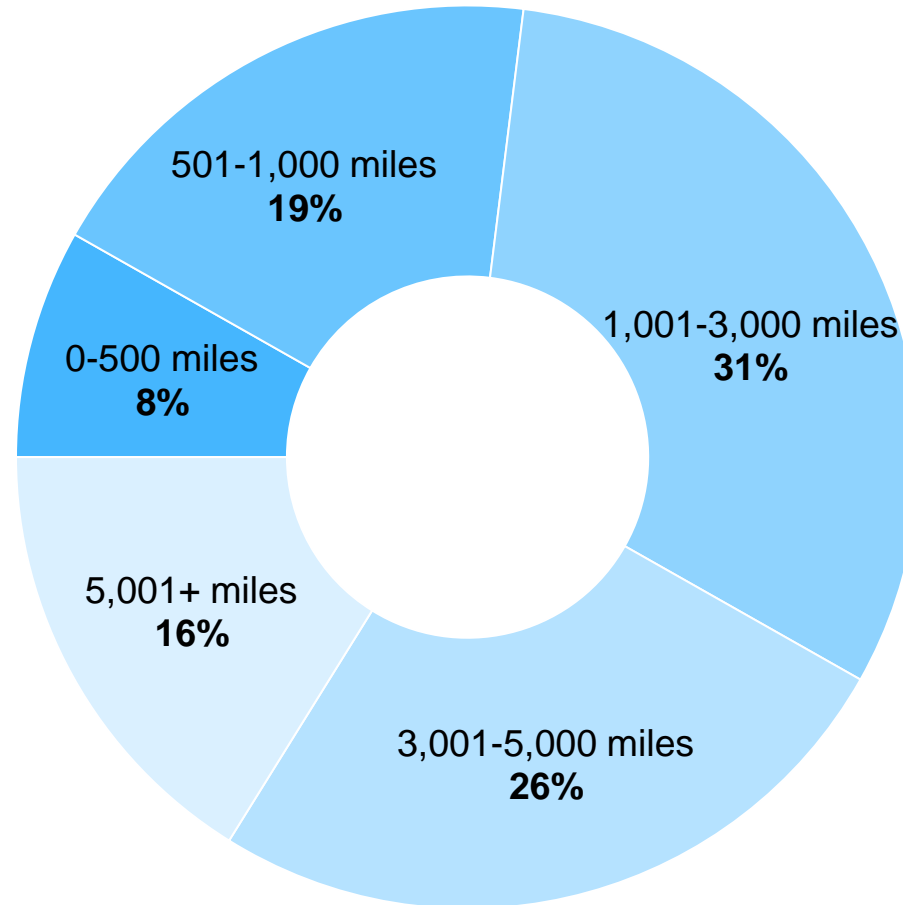
Sample Min. n=75

# Canada - Total Annual Holiday Spend



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

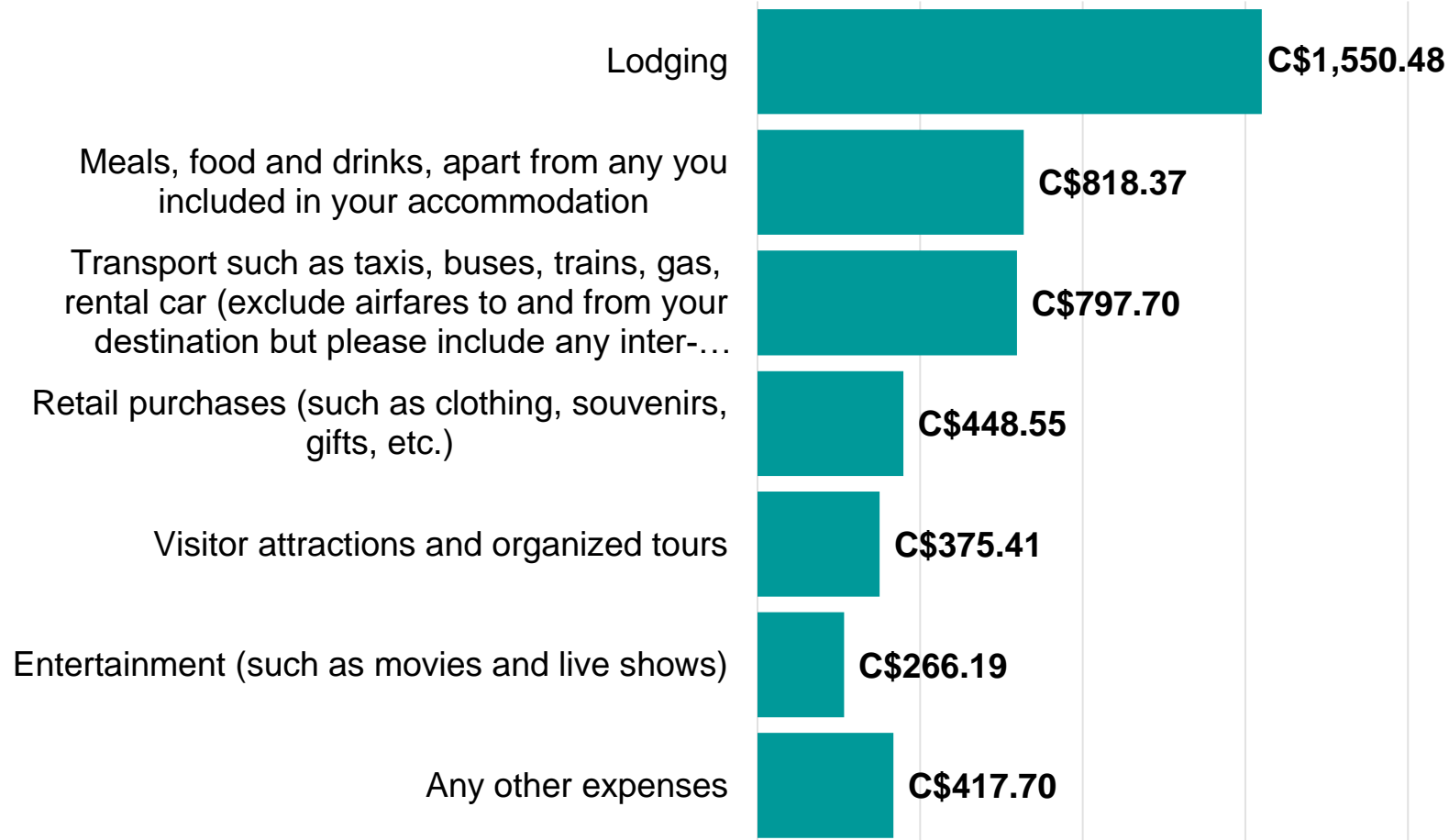
## Distance Travelled on Annual Vacation



Sample Size: n=157

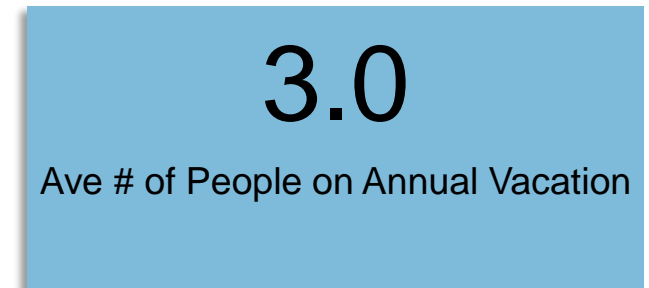
# Canada Avid Travelers \$100k+: Annual Vacation

## Average Spend



Sample Size: n=157

## Spend Per Person Per Day



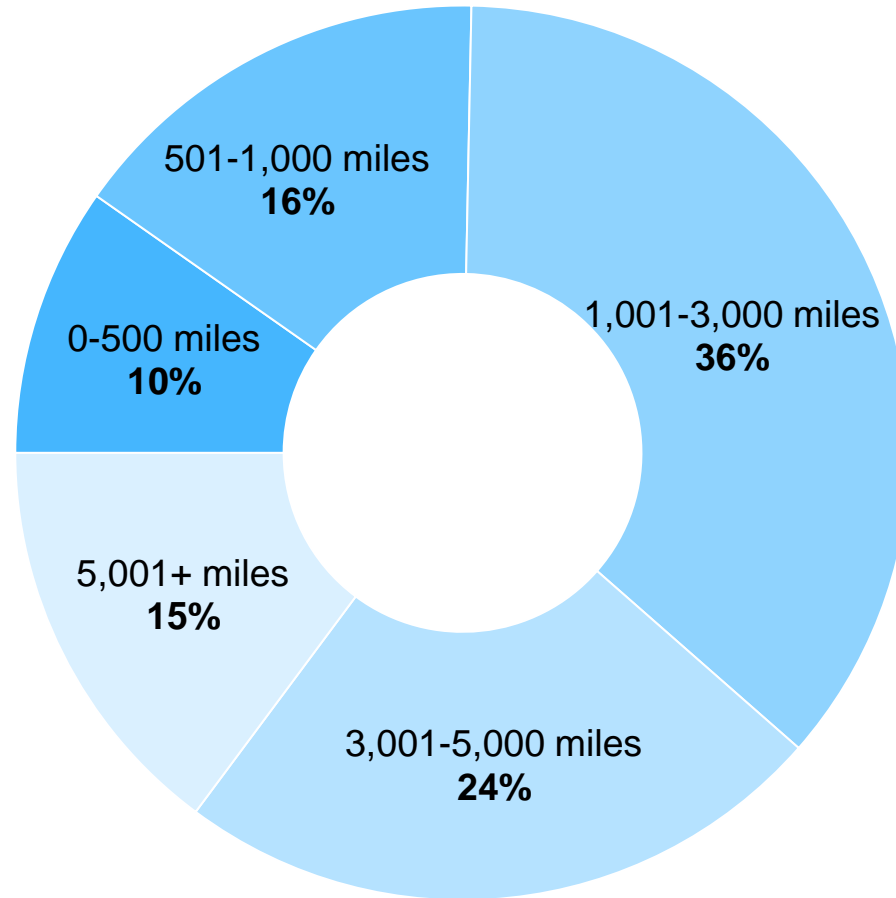
**C\$198.10**

Ave. Per Person Per Day Spend



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

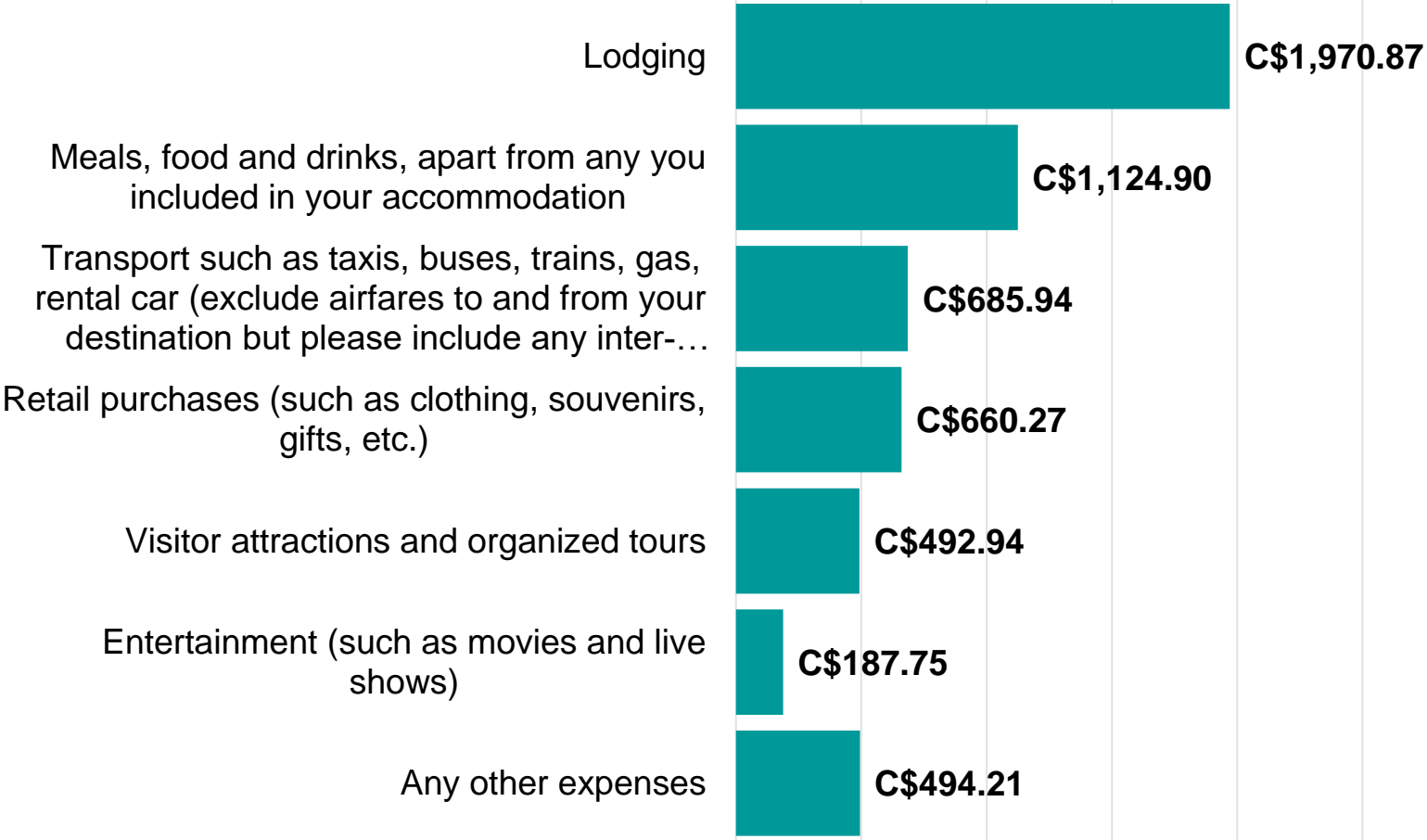
## Distance Travelled on Annual Vacation



Sample Size: n=127

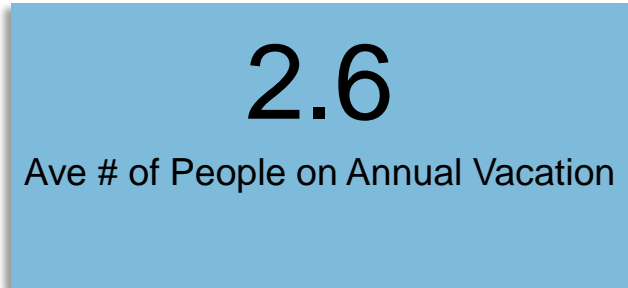
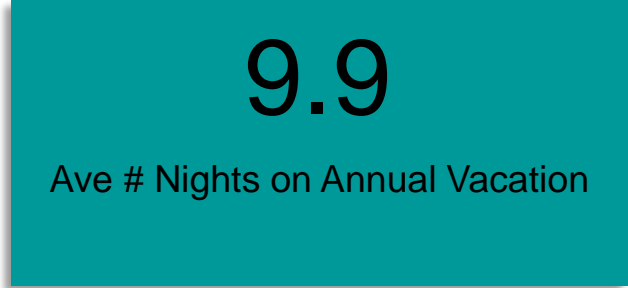
# Canada Older Avid Travelers \$100k+: Annual Vacation

## Average Spend



Sample Size: n=127

## Spend Per Person Per Day

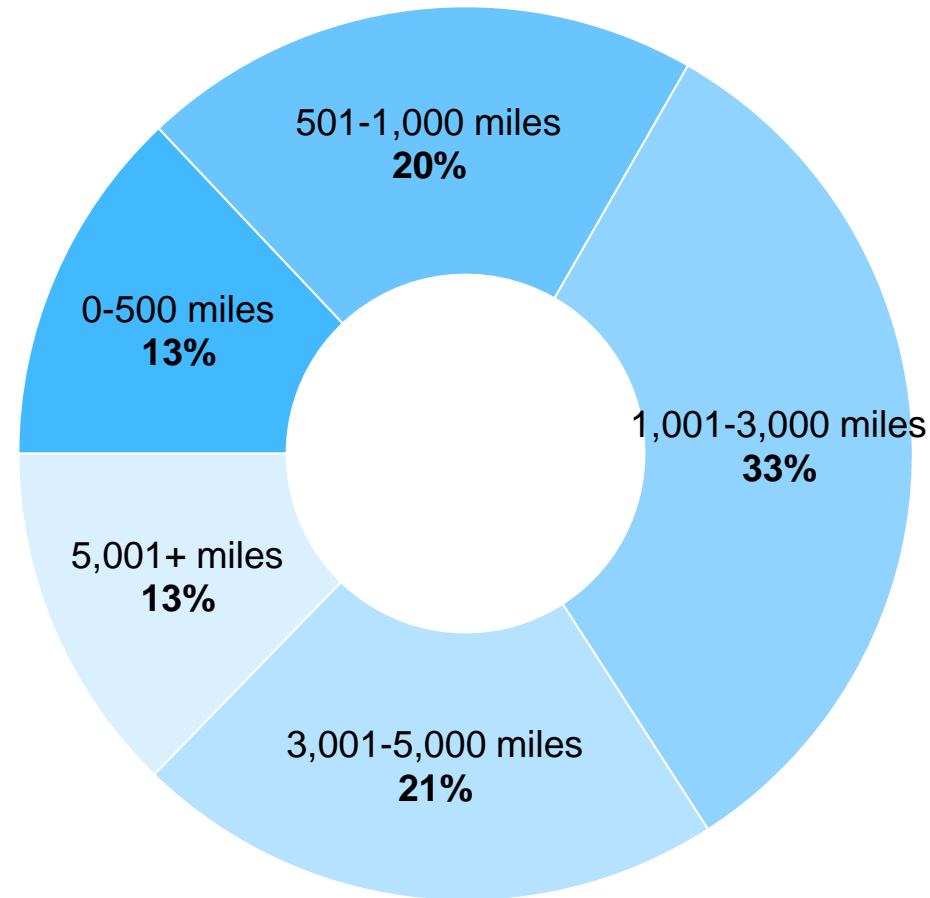


Ave. Per Person Per Day Spend

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.

# Canada Long-Distance Travelers: Annual Vacation

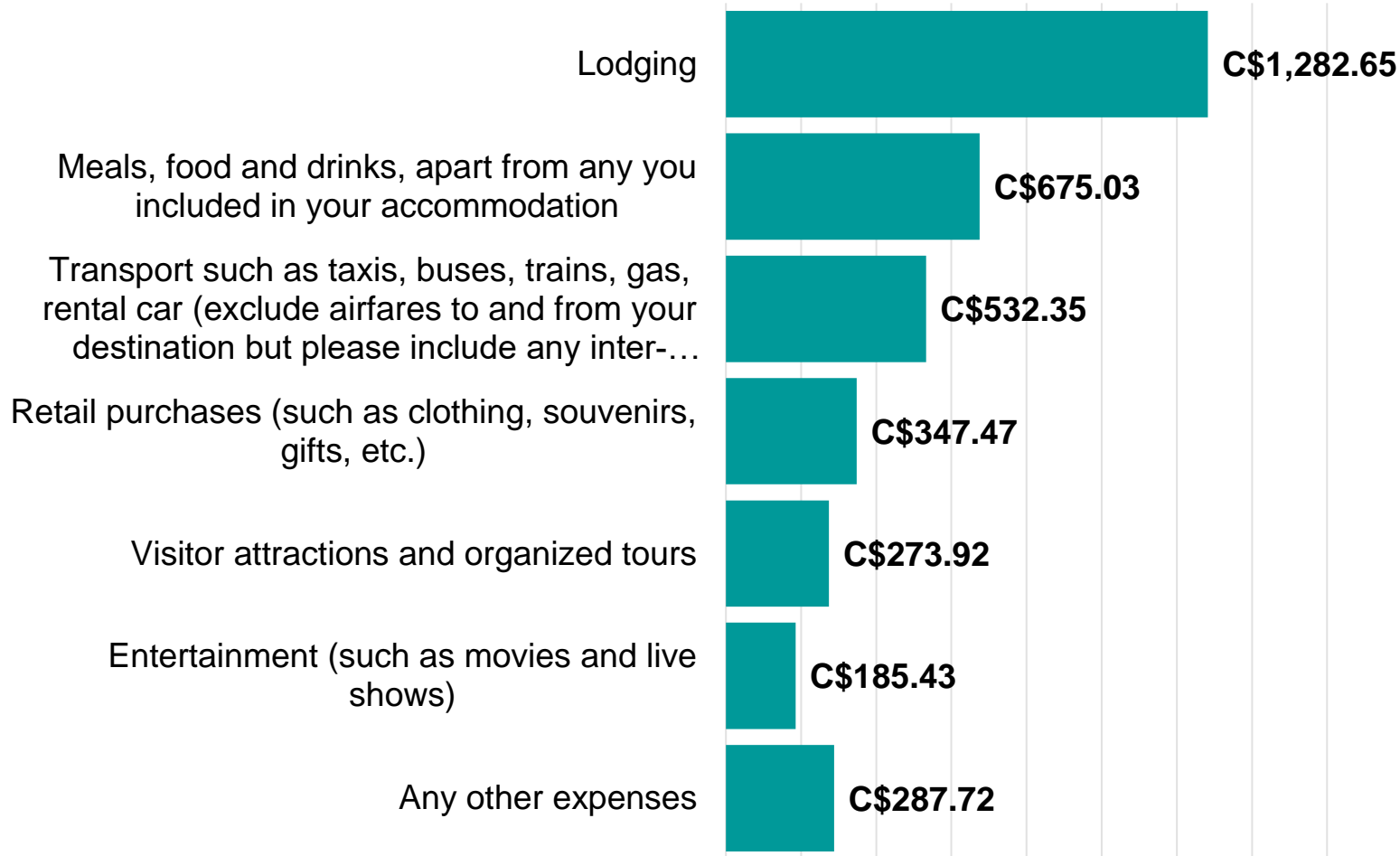
## Distance Travelled on Annual Vacation



Sample Size: n=909

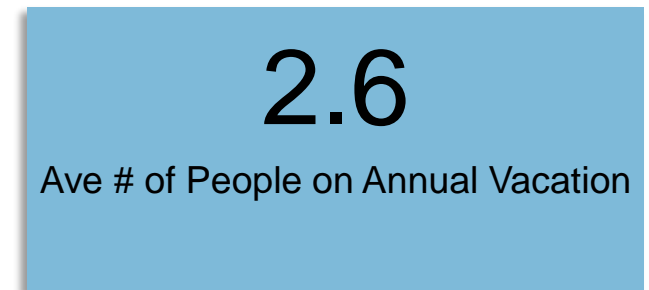
# Canada Long-Distance Travelers: Annual Vacation

## Average Spend



Sample Size: n=909

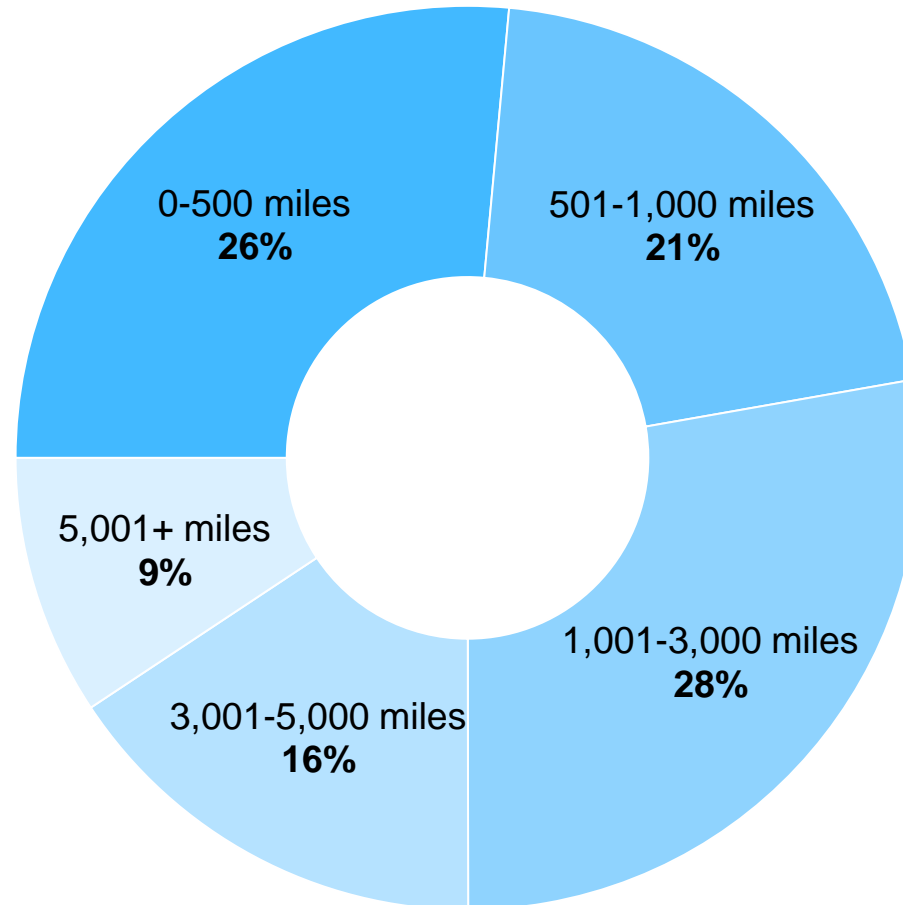
## Spend Per Person Per Day



**C\$169.47**  
Ave. Per Person Per Day Spend

# Canada Nat Rep: Annual Vacation

## Distance Travelled on Annual Vacation



Sample Size: n=2,150

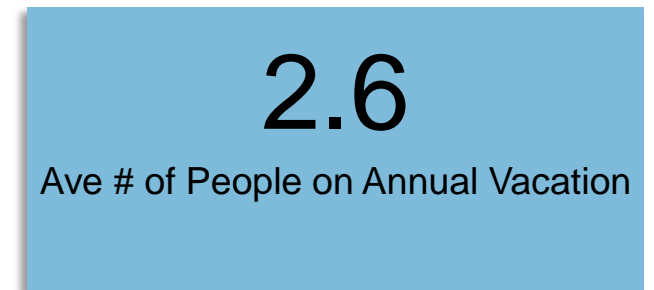
# Canada Nat Rep: Annual Vacation

## Average Spend



Sample Size: n=2,150

## Spend Per Person Per Day



**C\$152.87**  
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	58%	64%	31%	60%	59%
Comfort and accessibility	49%	52%	34%	50%	48%
Natural attractions/activities	45%	44%	45%	44%	42%
Family friendly locations and activities	42%	23%	8%	33%	30%
Opportunity to experience local restaurants/businesses	42%	41%	31%	38%	35%
Cultural attractions	37%	36%	26%	37%	34%
Entertainment and nightlife	21%	11%	8%	22%	23%
Consideration of sustainable principles	24%	20%	7%	20%	20%

Sample Size:

n=157

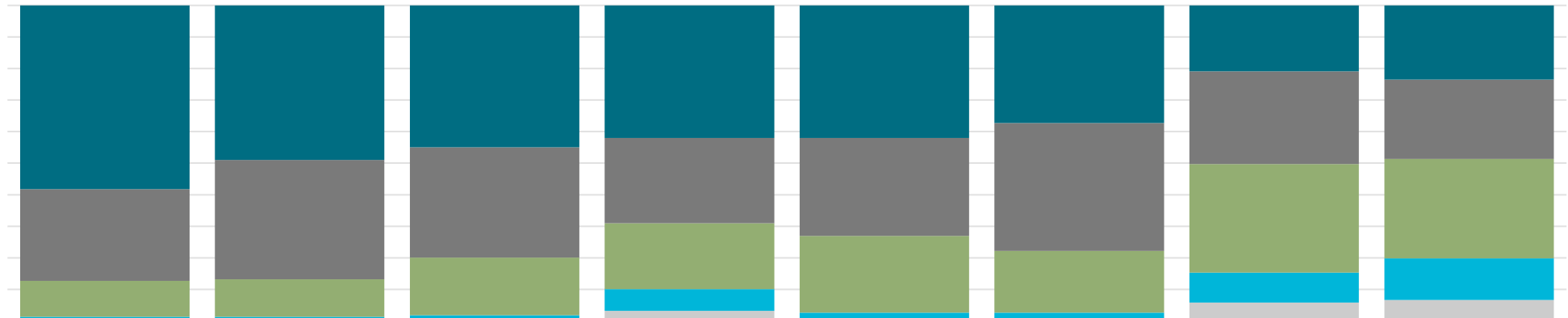
N=127

n=27

n=909

n=2,150

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



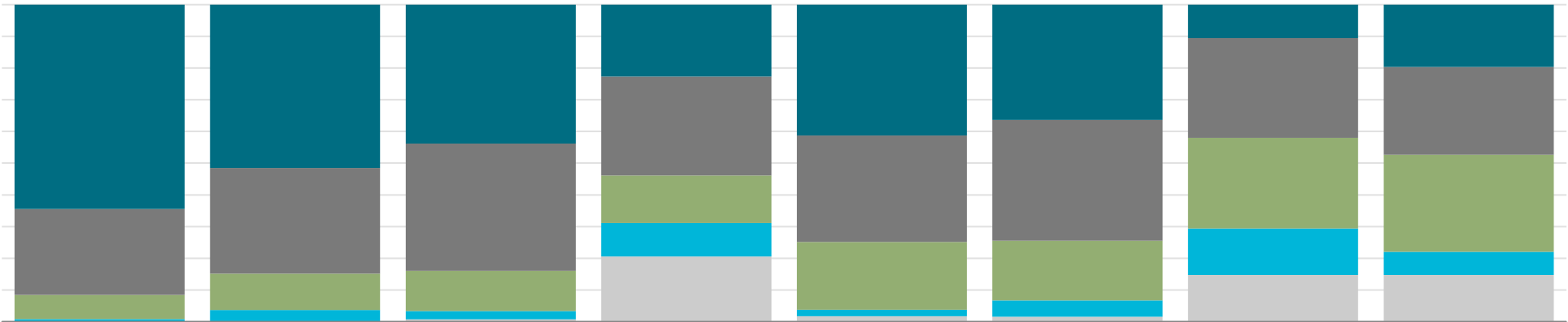
	Value for money	Comfort and accessibility	Natural attractions/activities	Family friendly locations and activities	Opportunity to experience local restaurants/businesses	Cultural attractions	Entertainment and nightlife	Consideration of sustainable principles
■ Very Important 5	58%	49%	45%	42%	42%	37%	21%	24%
■ 4	29%	38%	35%	27%	31%	40%	29%	25%
■ 3	11%	12%	18%	21%	24%	20%	34%	31%
■ 2	1%	1%	2%	7%	3%	2%	10%	13%
■ Not very Important 1	0%	1%	0%	3%	0%	1%	6%	7%

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

Sample Size: n=157



# Canada Older Avid Travelers \$100k+: 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
Very Important 5	64%	52%	44%	23%	41%	36%	11%	20%
4	27%	33%	40%	31%	34%	38%	31%	28%
3	8%	11%	13%	15%	21%	19%	29%	31%
2	1%	4%	3%	11%	2%	5%	15%	7%
Not very Important 1	0%	0%	1%	21%	2%	2%	15%	15%

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

Sample Size: n=127

# 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
Very Important 5	60%	50%	44%	33%	38%	37%	22%	20%
4	30%	36%	37%	29%	36%	37%	28%	30%
3	8%	11%	15%	20%	21%	20%	28%	30%
2	1%	2%	3%	9%	3%	4%	12%	11%
Not very Important 1	1%	1%	1%	10%	2%	2%	10%	9%

Not very Important 1
  2
  3
  4
  Very Important 5

Sample Size: n=909

# Canada Nat Rep: Importance of Travel Factors



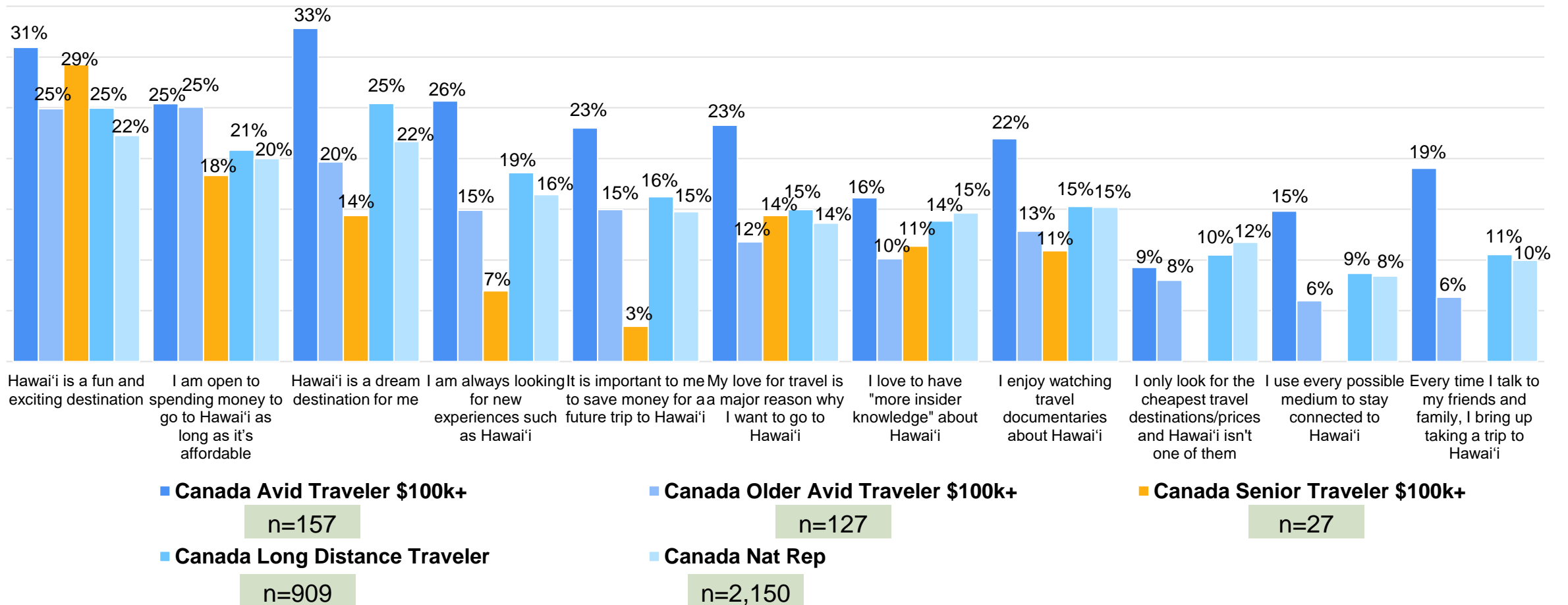
	Value for money	Comfort and accessibility	Natural attractions/activities	Family friendly locations and activities	Opportunity to experience local restaurants/businesses	Cultural attractions	Entertainment and nightlife	Consideration of sustainable principles
■ Very Important 5	59%	48%	42%	30%	35%	34%	23%	20%
■ 4	29%	35%	36%	28%	37%	36%	25%	29%
■ 3	9%	13%	16%	23%	20%	22%	28%	31%
■ 2	2%	2%	4%	10%	4%	5%	12%	11%
■ Not very Important 1	1%	2%	2%	10%	3%	4%	12%	10%

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

Sample Size: n=2,150

# Canada - Hawai'i as an Aspirational Destination

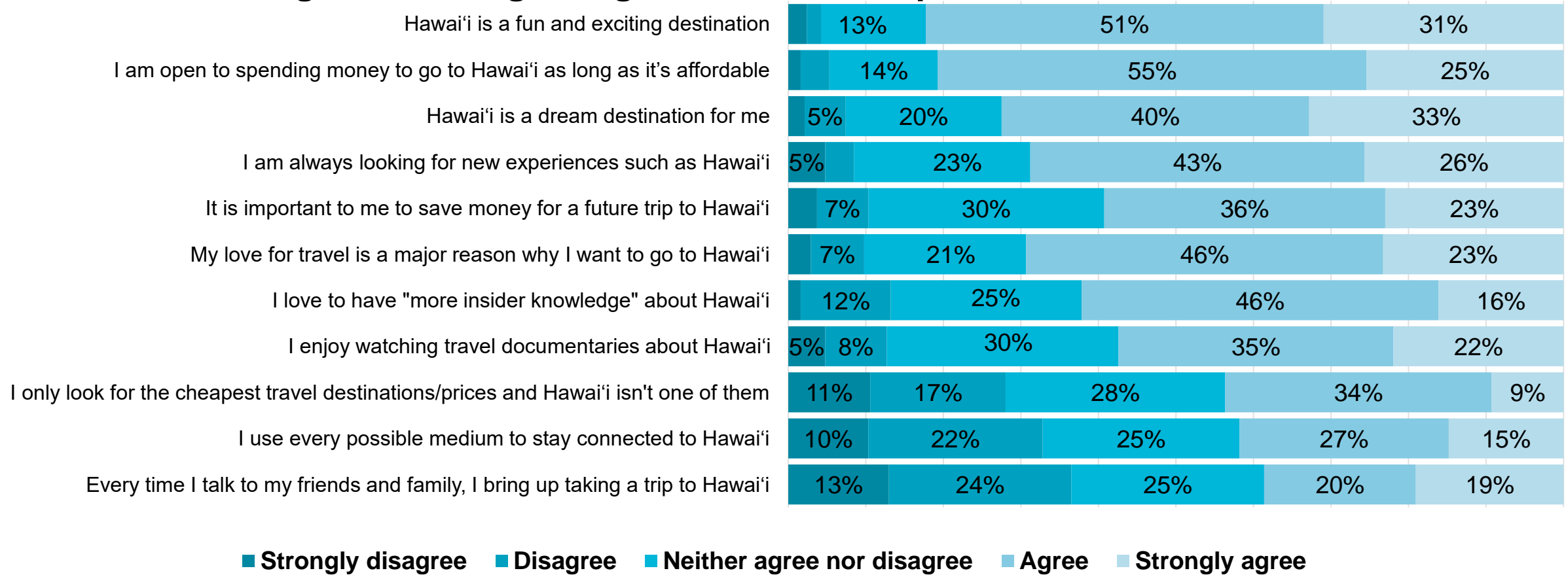
## Agreement Regarding Hawai'i as a Travel Destination (Strongly Agree)



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

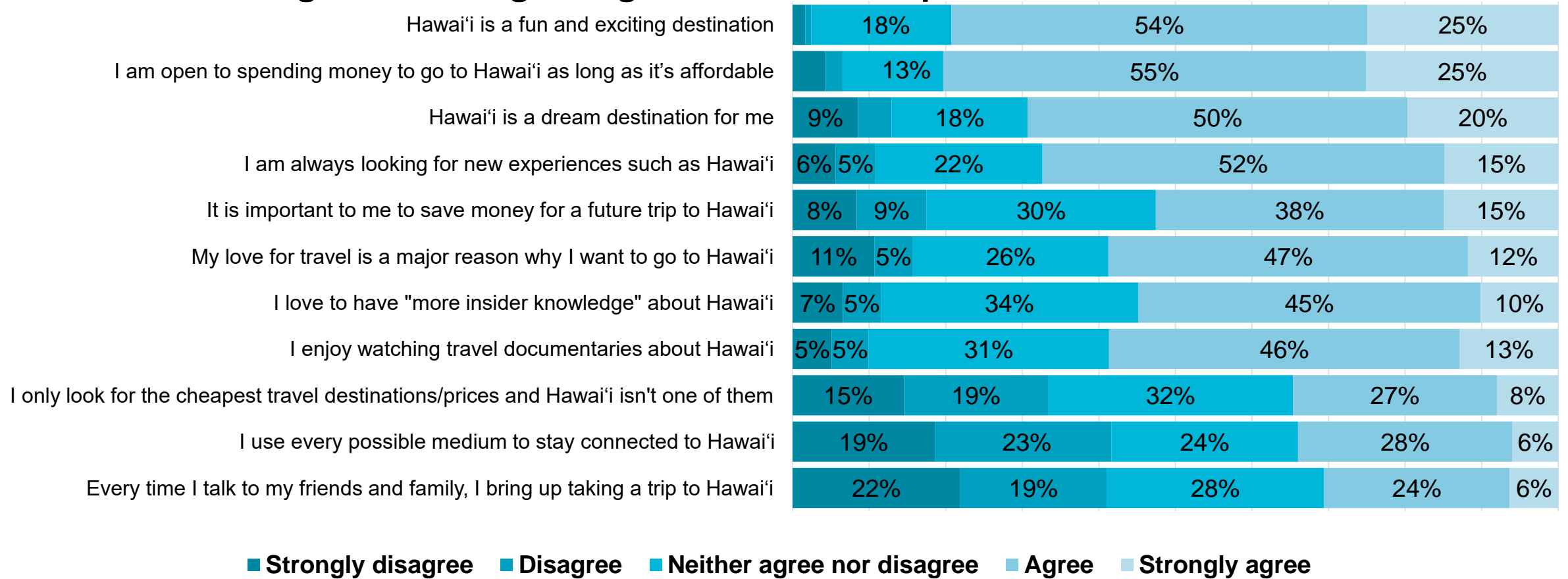
## Agreement Regarding Hawai'i as an Aspirational Destination



Sample Size: n=157

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

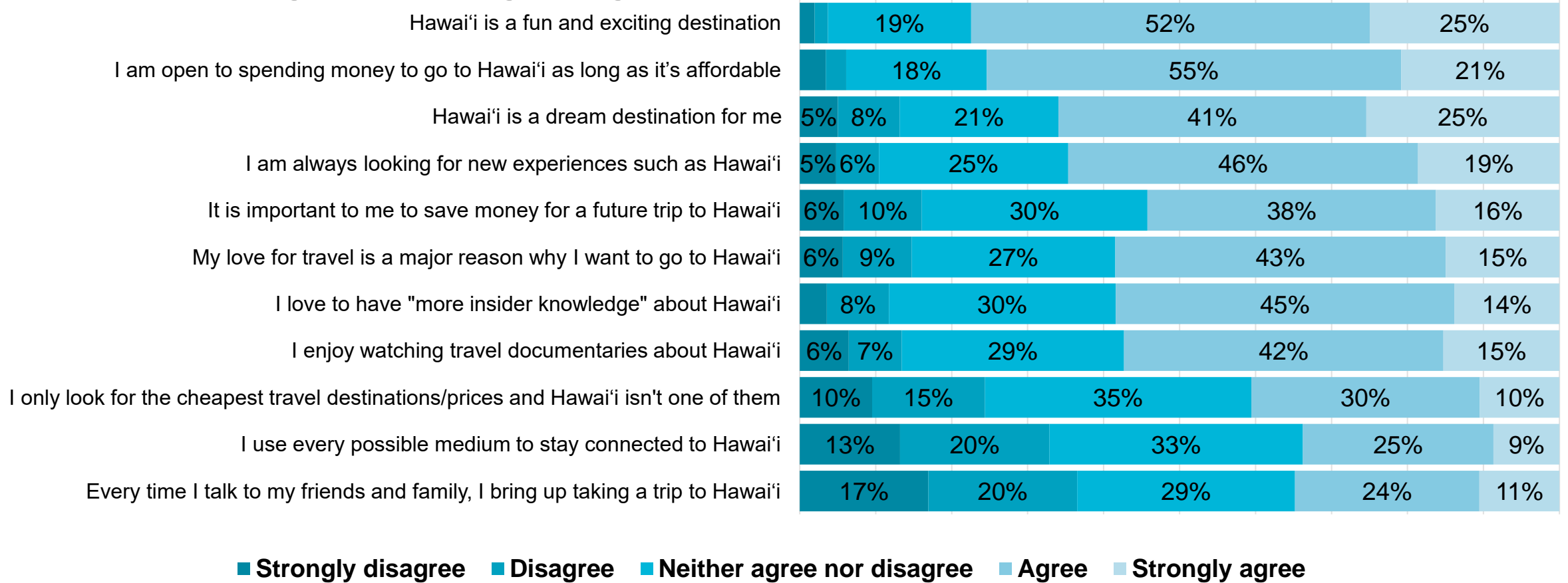
## Agreement Regarding Hawai'i as an Aspirational Destination



Sample Size: n=127

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

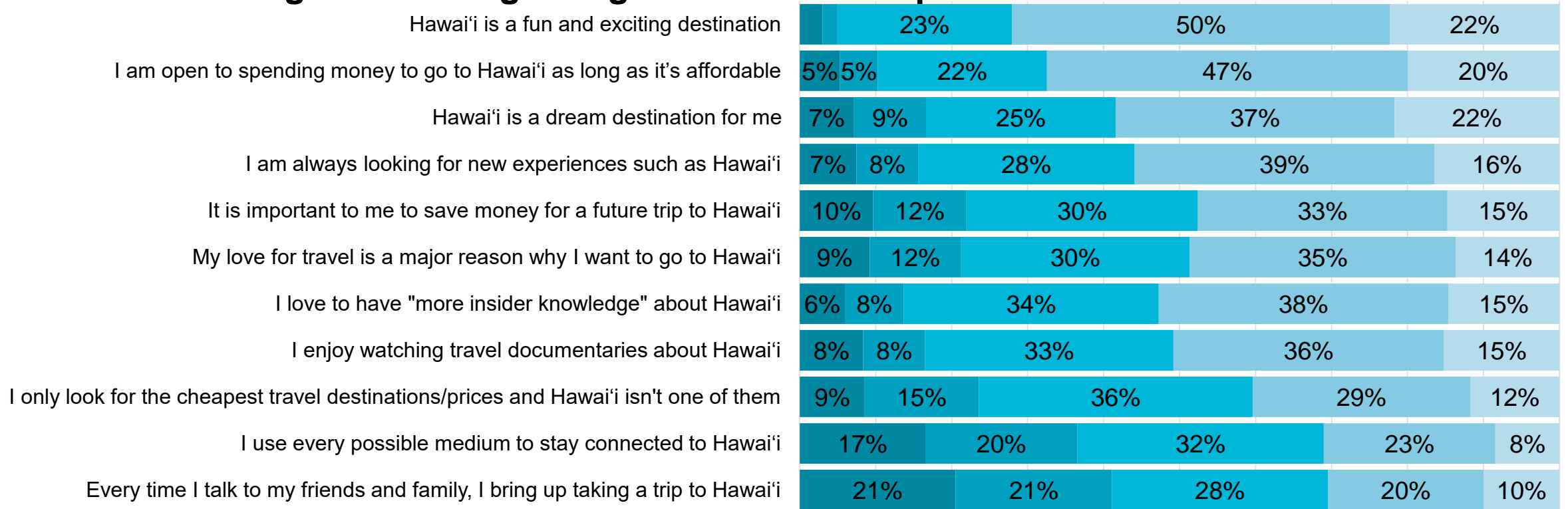
## Agreement Regarding Hawai'i as an Aspirational Destination



Sample Size: n=909

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

## Agreement Regarding Hawai'i as an Aspirational Destination



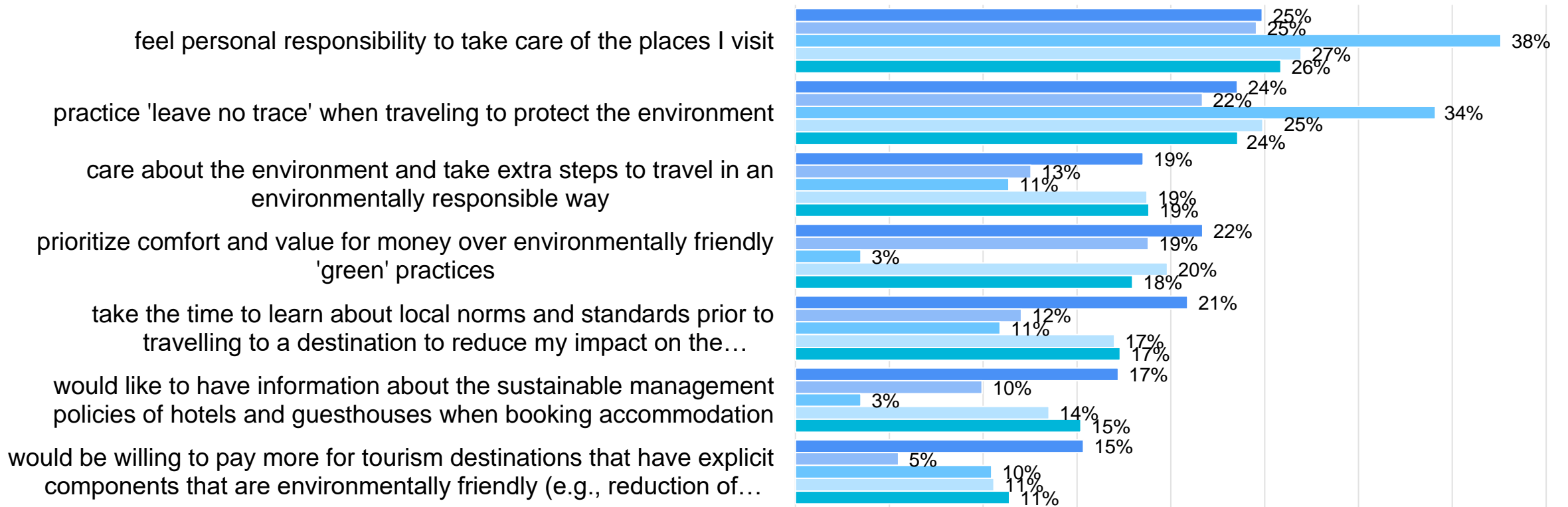
■ Strongly disagree 
 ■ Disagree 
 ■ Neither agree nor disagree 
 ■ Agree 
 ■ Strongly agree

Sample Size: n=2,150



# Canada - Sustainability and Travel Responsibility Statements

## Agreement Regarding Sustainable Practices While Traveling (Strongly Agree)



■ **Canada Avid Traveler \$100k+**

n=157

■ **Canada Older Avid Traveler \$100k+**

n=127

■ **Canada Senior Traveler \$100k+**

n=27

■ **Canada Long Distance Traveler**

n=909

■ **Canada Nat Rep**

n=2,150

# Canada - Sustainability and Travel Responsibility Statements

## Agreement Regarding Sustaining Local Culture While Traveling (Strongly Agree)



■ **Canada Avid Traveler \$100k+**

n=157

■ **Canada Older Avid Traveler \$100k+**

n=127

■ **Canada Senior Traveler \$100k+**

n=27

■ **Canada Long Distance Traveler**

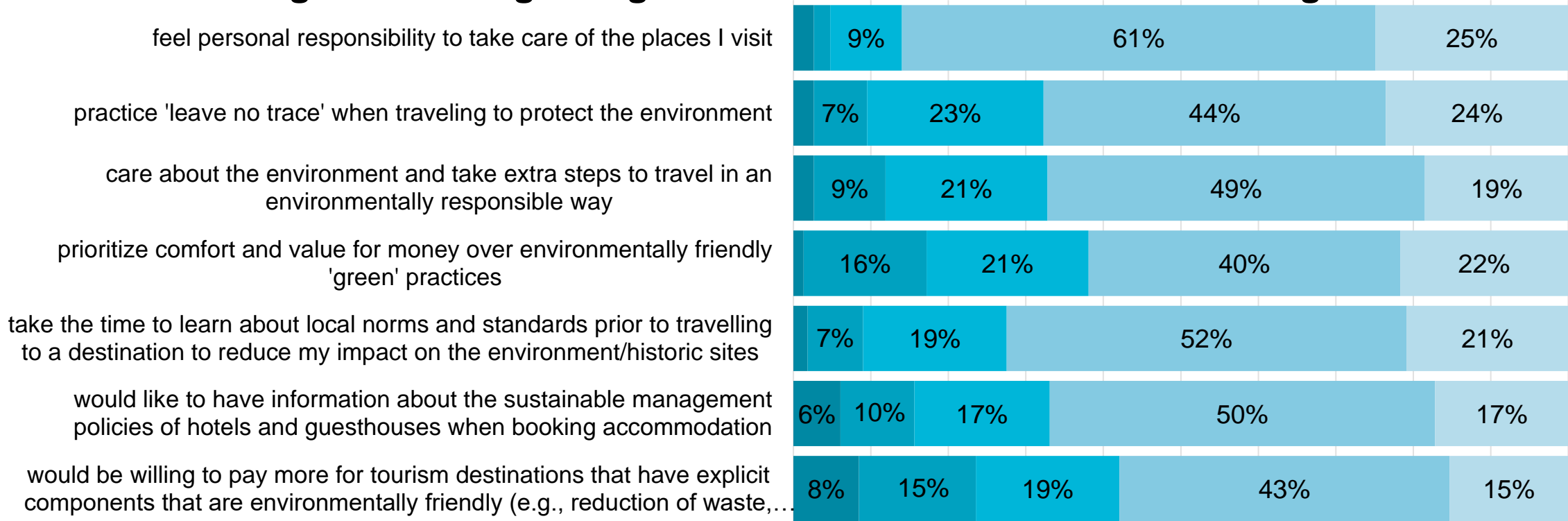
n=909

■ **Canada Nat Rep**

n=2,150

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

## Agreement Regarding Sustainable Practices While Traveling

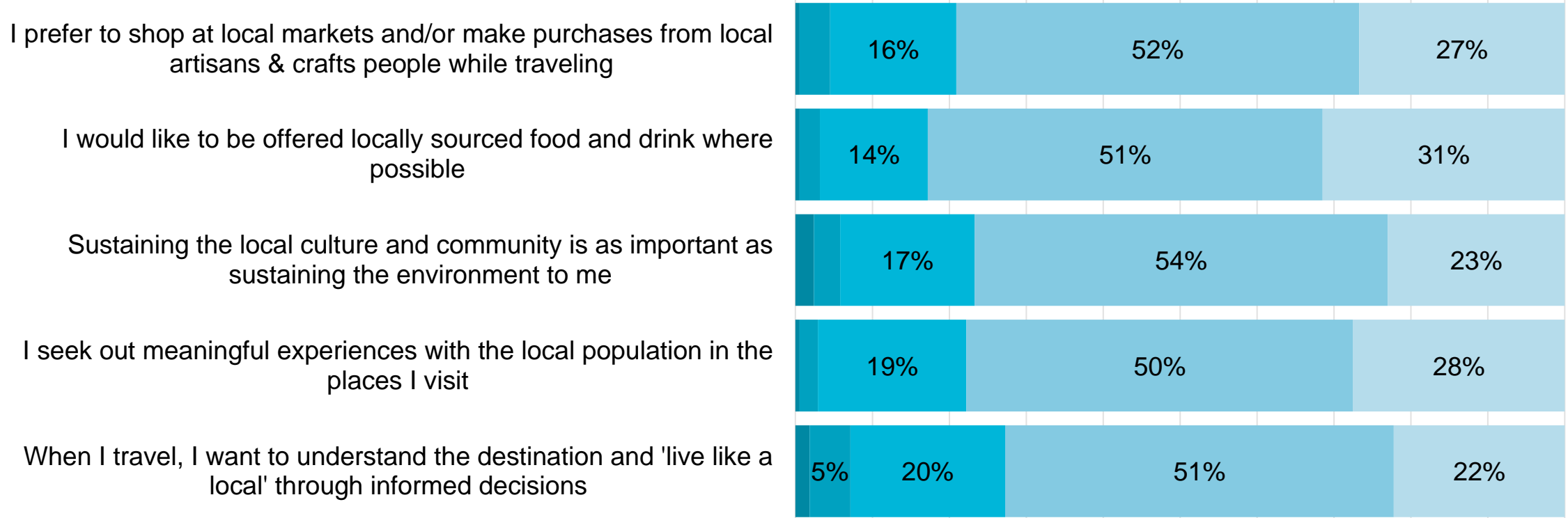


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=157

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

## Agreement Regarding Sustaining Local Culture While Traveling

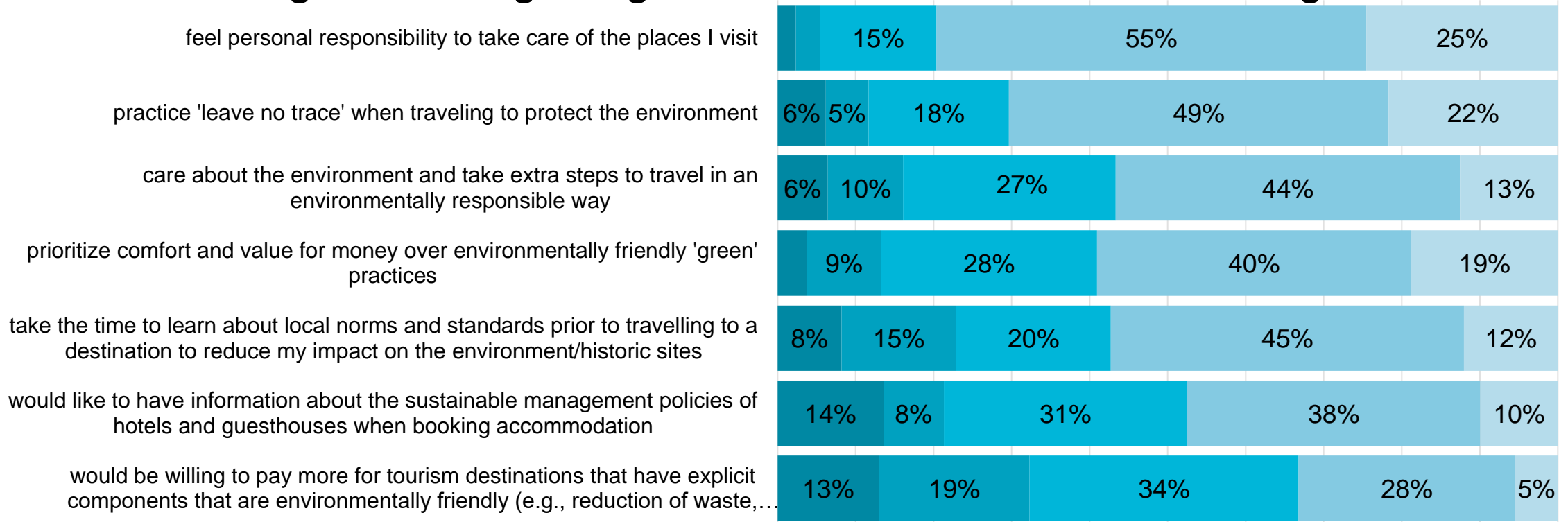


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=157

# 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

Sample Size: n=127

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

## Agreement Regarding Sustaining Local Culture While Traveling

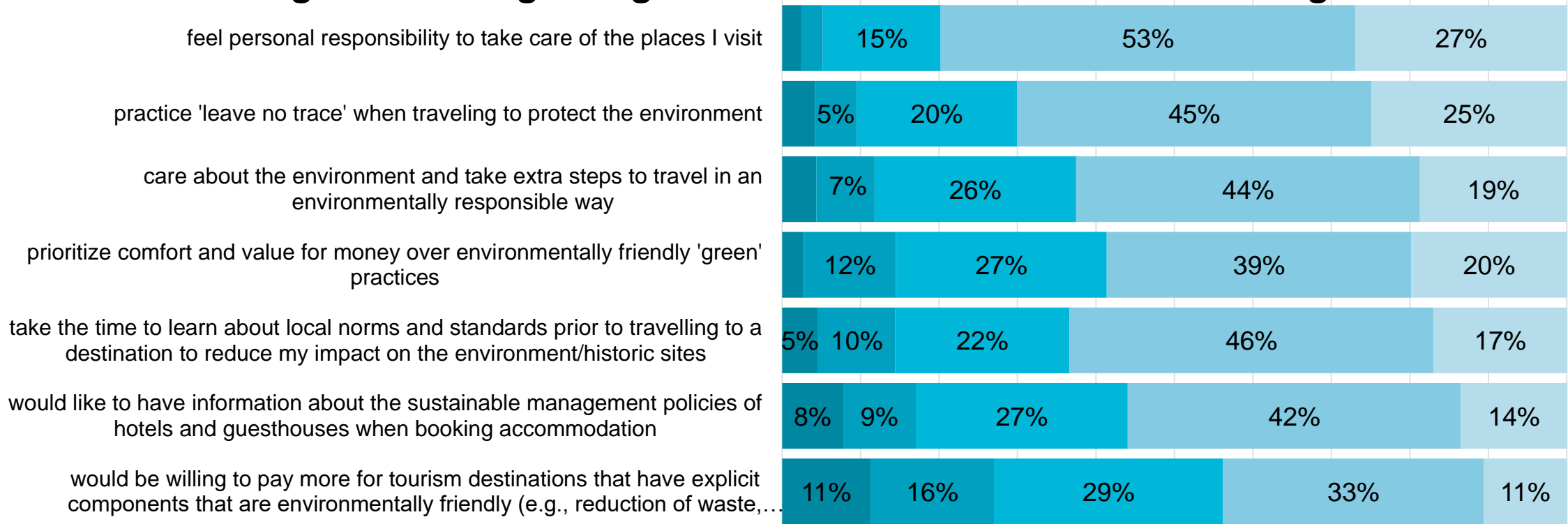


■ Strongly disagree 
 ■ Disagree 
 ■ Neither agree nor disagree 
 ■ Agree 
 ■ Strongly agree

Sample Size: n=127

# Canada Long Distance Travelers: Sustainability and Travel Responsibility Statements

## Agreement Regarding Sustainable Practices While Traveling

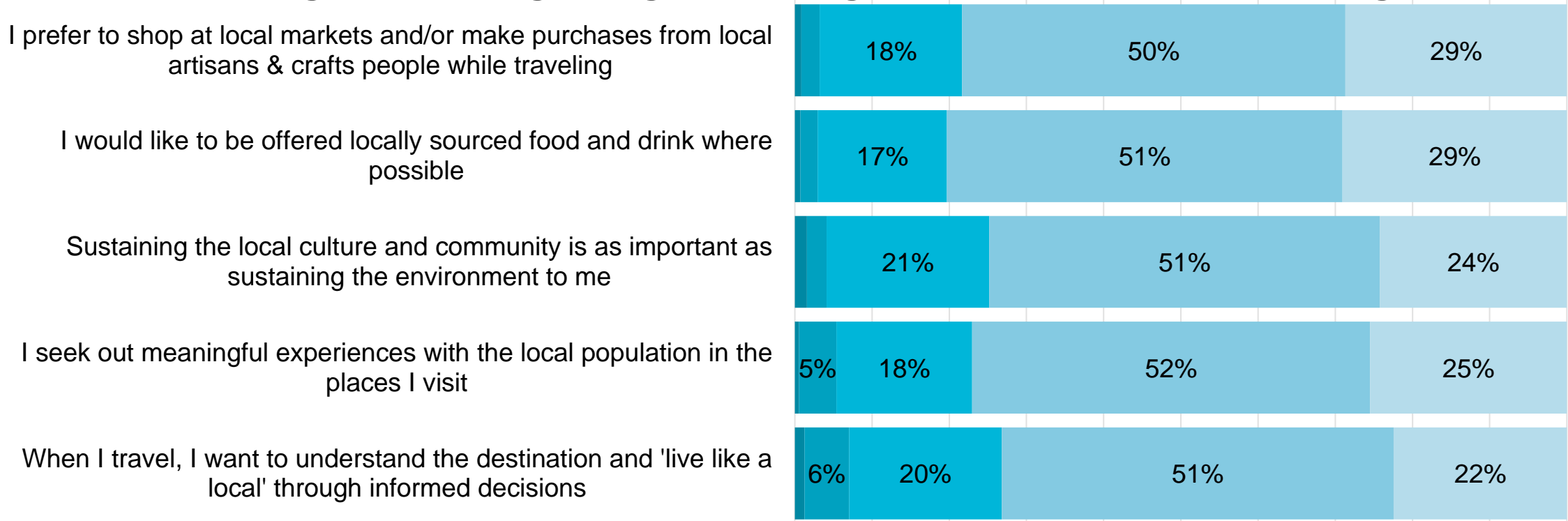


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=909

# Canada Long Distance Travelers: Sustainability and Travel Responsibility Statements

## Agreement Regarding Sustaining Local Culture While Traveling



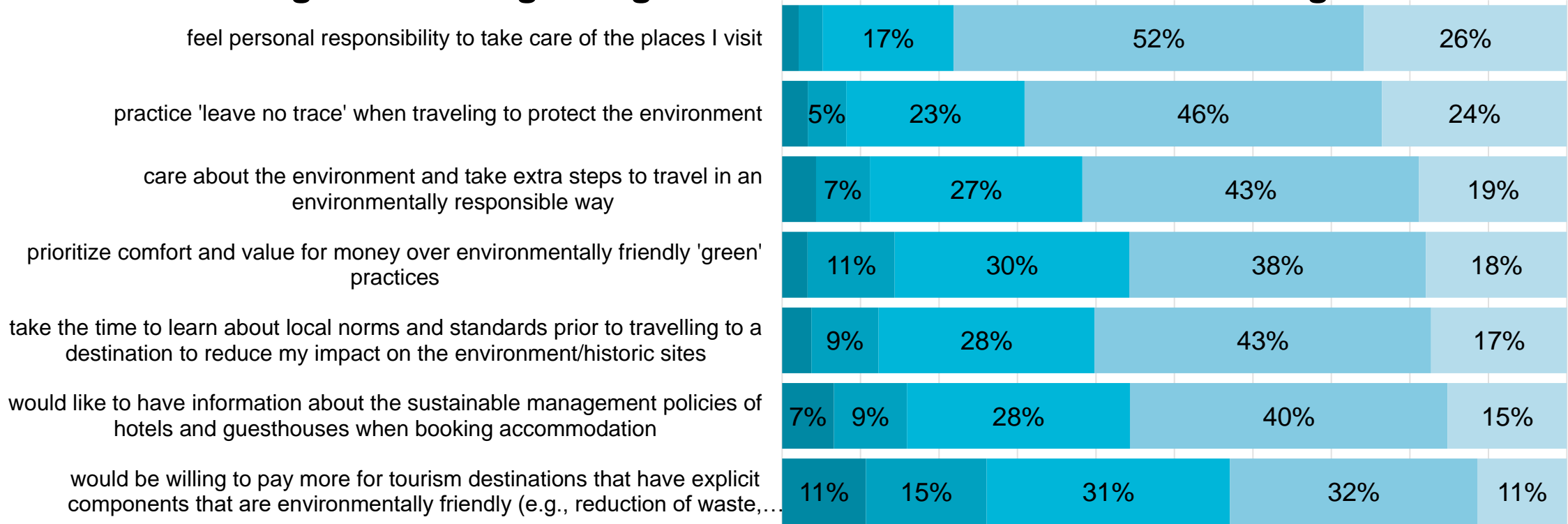
■ Strongly disagree 
 ■ Disagree 
 ■ Neither agree nor disagree 
 ■ Agree 
 ■ Strongly agree

Sample Size: n=909



# Canada Nat Rep: Sustainability and Travel Responsibility Statements

## Agreement Regarding Sustainable Practices While Traveling

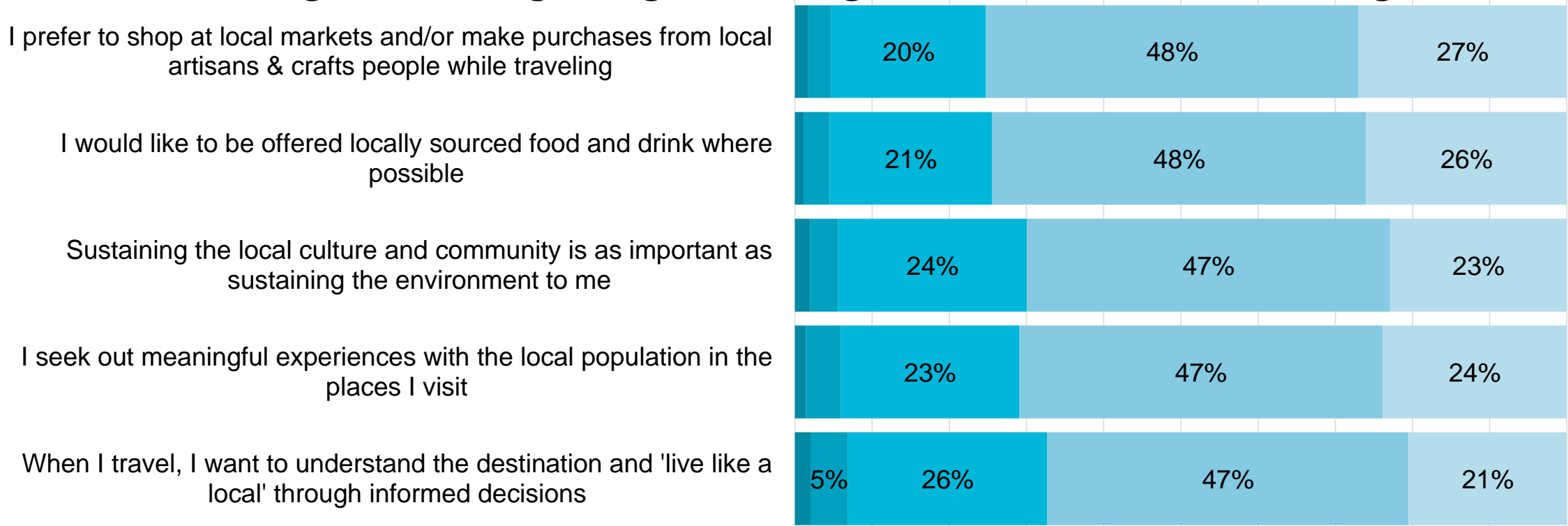


■ Strongly disagree 
 ■ Disagree 
 ■ Neither agree nor disagree 
 ■ Agree 
 ■ Strongly agree

Sample Size: n=2,150

# Canada Nat Rep: Sustainability and Travel Responsibility Statements

## Agreement Regarding Sustaining Local Culture While Traveling

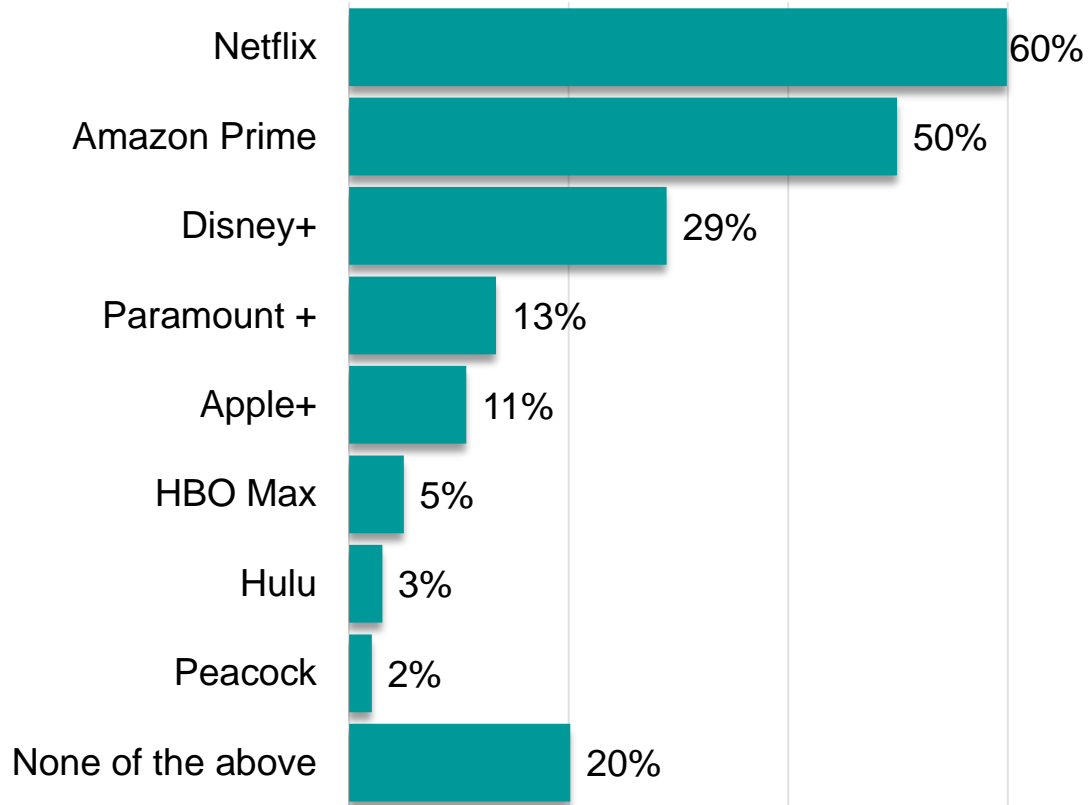


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

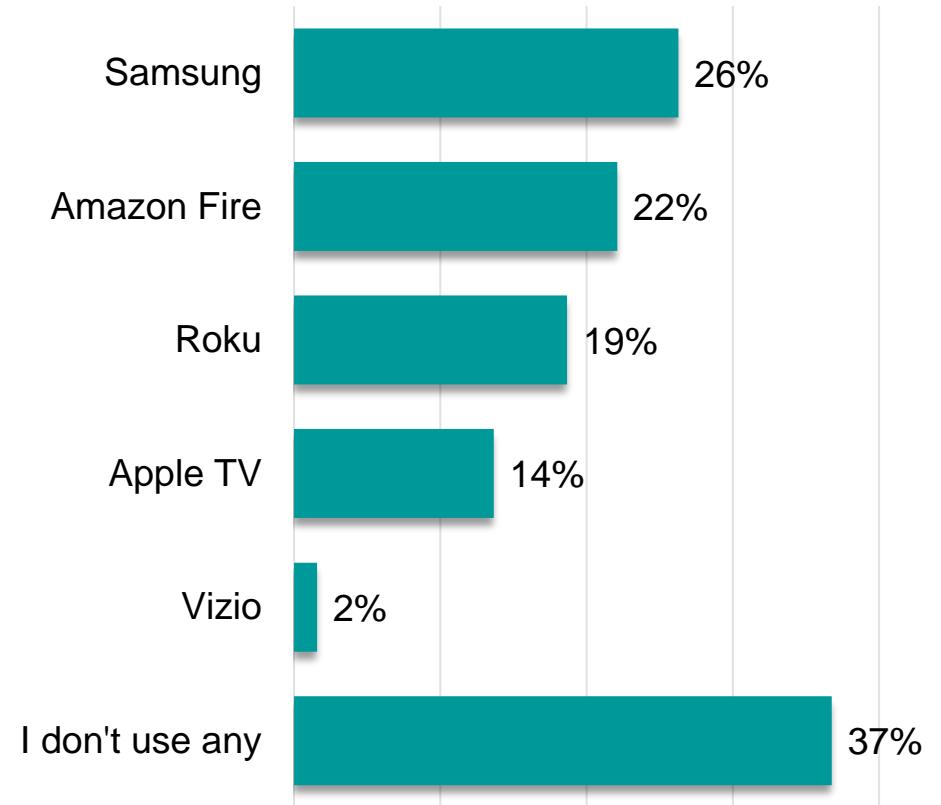
Sample Size: n=2,150

# Canada Media Consumption

## Streaming Platforms Used Weekly



## Connected Device Used

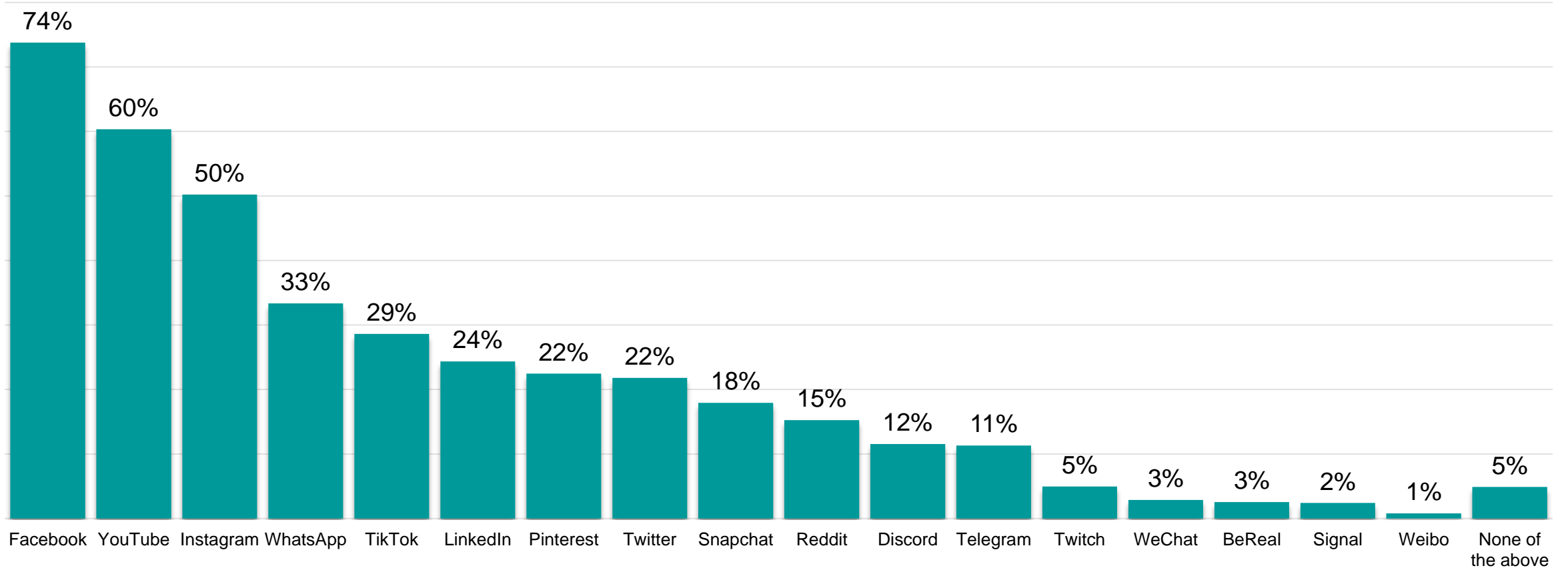


Sample Size: n=2,150

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



Sample Size: n=2,150

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	22%
Online	37%
Radio	8%
TV commercials	27%
Newspaper	11%
Friends/Family	52%
Social Media	39%
YouTube	36%
Out of Home Advertising (e.g., poster billboards, bus shelter advertisements, etc.)	9%
Email	16%
I don't recall	11%

## 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	47%
I look up the destination on social media	23%
I talk to friends/family about the destination	36%
I book travel to the destination almost immediately	8%
I don't do anything	19%
None of the above	7%

Sample Size: n=2,150