VISION INSIGHTS

Vision Insights Canada Traveler Profiles Q1 2023

June 19, 2023



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 US, 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

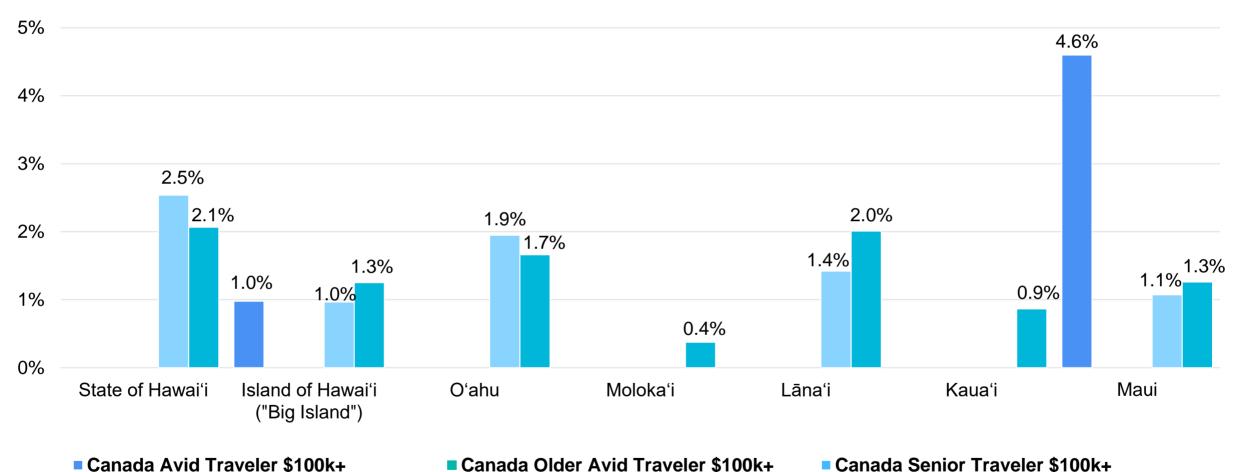
Older Avid Traveler \$100k+

- 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

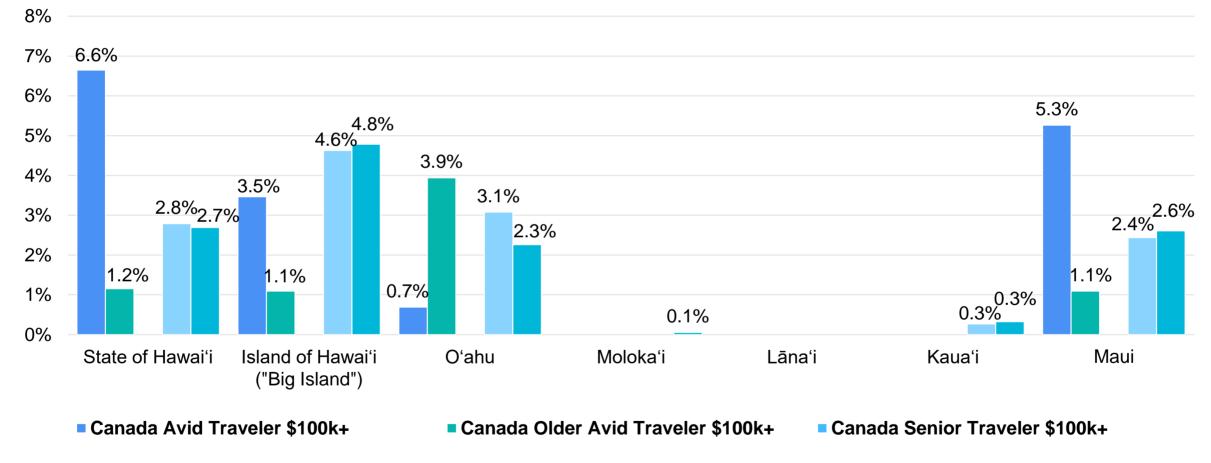


Canada Long Distance Air Traveler

Canada Nat Rep

Sample Min. n=75

Canada - Next Destination for Leisure Trip

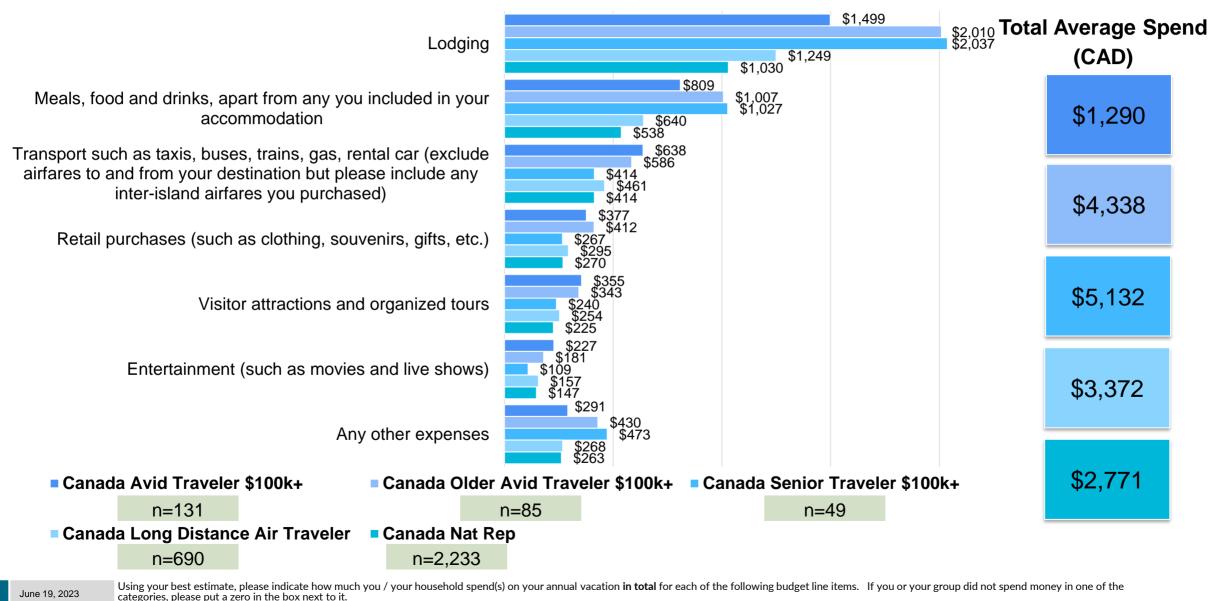


Canada Long Distance Air Traveler

Sample Min. n=75

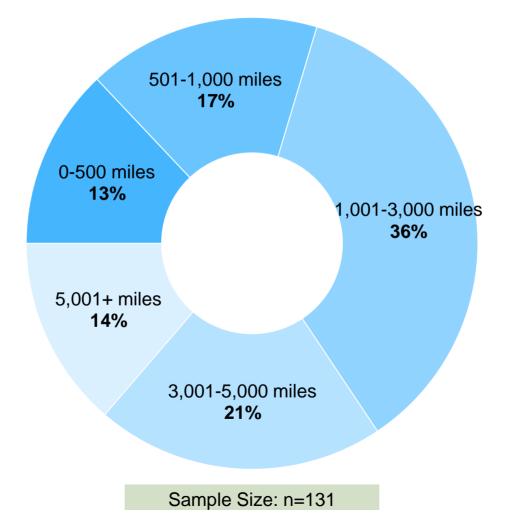
Canada Nat Rep

Canada - Total Annual Holiday Spend



Canada Avid Travelers \$100k+: Annual Vacation

Distance Travelled on Annual Vacation



Canada Avid Travelers \$100k+: Annual Vacation

Average Spend Spend Per Person Per Day Lodging \$1,662.67 7.5 Meals, food and drinks, apart from any you \$836.56 Ave # Nights on Annual Vacation included in your accommodation Transport such as taxis, buses, trains, gas, rental car (exclude airfares to and from your \$648.04 destination but please include any inter-... 3.7 Retail purchases (such as clothing, souvenirs, \$363.86 gifts, etc.) Ave # of People on Annual Vacation Visitor attractions and organized tours \$367.85 Entertainment (such as movies and live shows) \$208.89 \$157.62 Any other expenses \$250.95

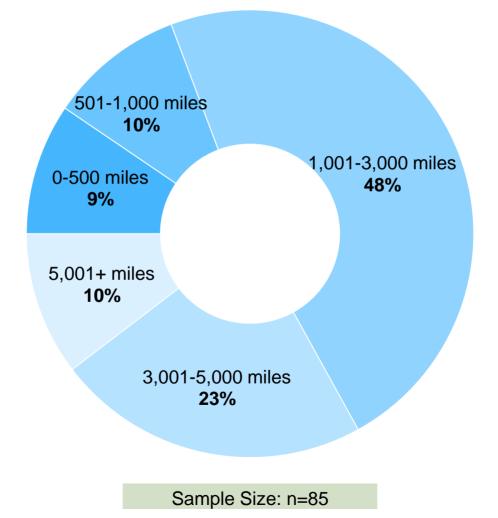
Sample Size: n=131

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Ave. Per Person Per Day Spend

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

Distance Travelled on Annual Vacation



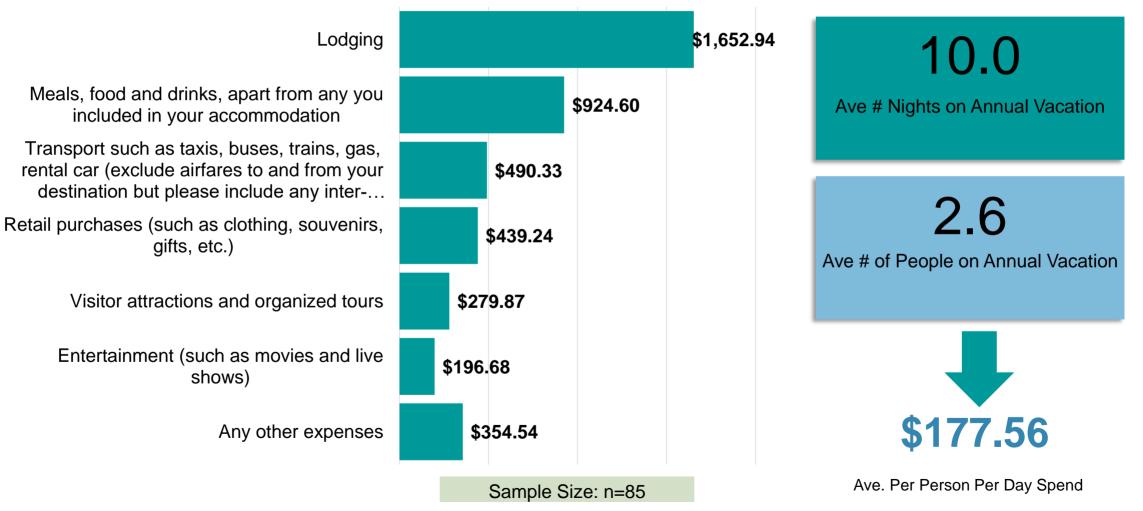
How far do you normally travel for your annual vacation? | Typically, for how many nights do you travel for your annual vacation? | Including yourself, how many individuals typically travel with you on your annual vacation? | Using your best estimate, please indicate how much you / your household spend(s) 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.

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

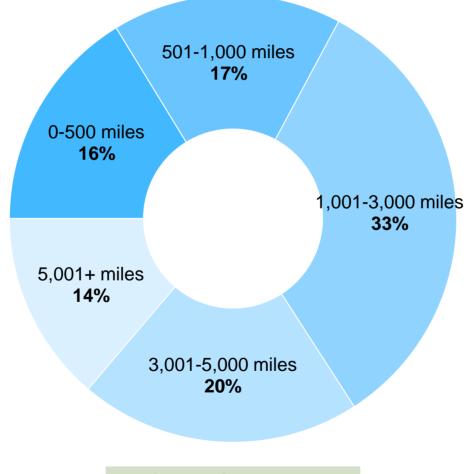
Average Spend

Spend Per Person Per Day



Canada Long-Distance Travelers: Annual Vacation

Distance Travelled on Annual Vacation



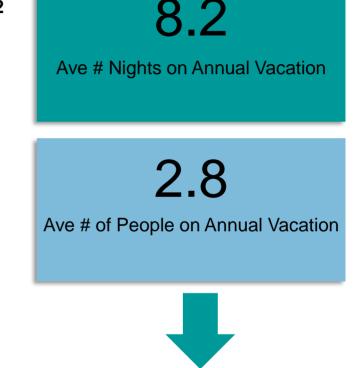
Sample Size: n=690

Canada Long-Distance Travelers: Annual Vacation

Average Spend

Spend Per Person Per Day





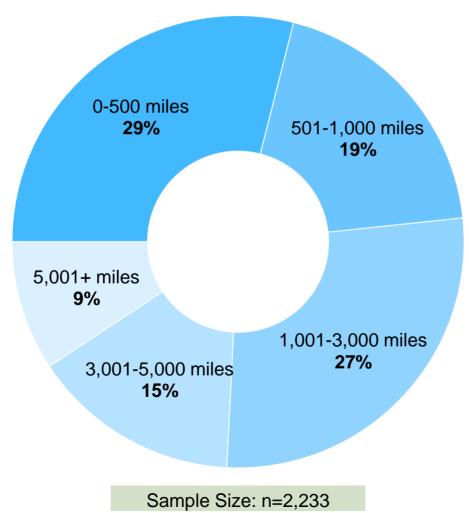
Ave. Per Person Per Day Spend

\$155.25

Canada Nat Rep: Annual Vacation

June 19, 2023

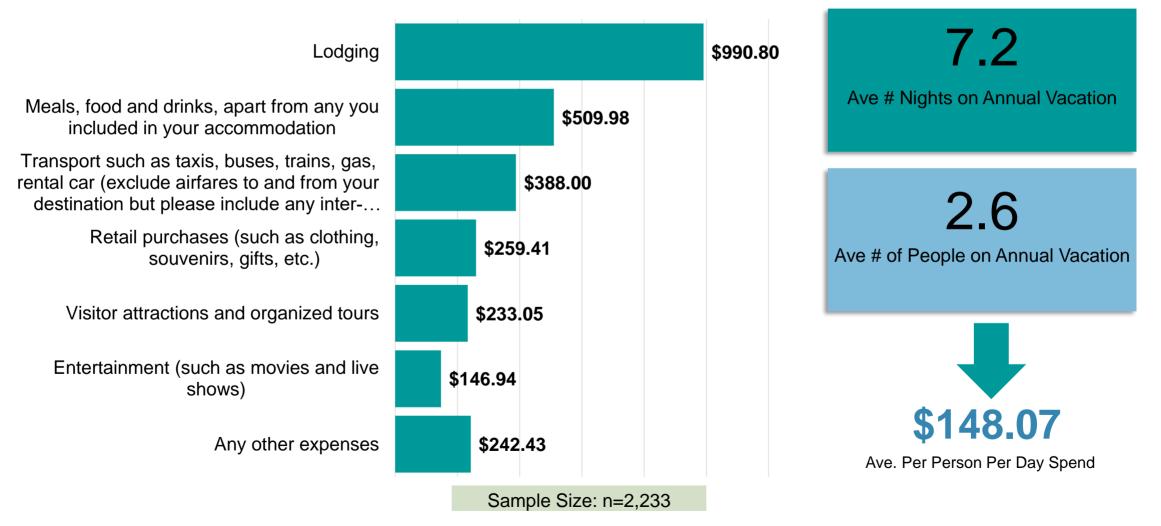
Distance Travelled on Annual Vacation



Canada Nat Rep: Annual Vacation

Average Spend

Spend Per Person Per Day



Canada - Importance of Travel Factors

		Ve	ry 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	50%	58%	35%	57%	57%
Comfort and accessibility	44%	40%	29%	46%	47%
Natural attractions/activities	34%	36%	45%	39%	40%
Family friendly locations and activities	32%	23%	21%	32%	30%
Opportunity to experience local restaurants/businesses	26%	37%	35%	34%	33%
Cultural attractions	24%	40%	41%	34%	31%
Entertainment and nightlife	19%	12%	4%	18%	19%
Consideration of sustainable principles	13%	14%	4%	17%	17%
Sample Size:	n=131	n=85	n=49	n=690	n=2,233

How important are the following factors in choosing your travel destination. Please rate the following list with 1 = not very important and 5 = very important?

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	50%	44%	34%	32%	26%	24%	19%	13%
■4	32%	34%	41%	27%	39%	39%	35%	34%
■3	15%	18%	17%	20%	26%	27%	31%	34%
2	2%	2%	5%	11%	5%	6%	10%	10%
Not very Important 1	1%	2%	3%	9%	4%	5%	6%	9%

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

Sample Size: n=131

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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	HENTOTIONMONT	Consideration of sustainable principles
Very Important 5	58%	40%	36%	23%	37%	40%	12%	14%
■ 4	27%	45%	42%	23%	42%	34%	32%	23%
■3	15%	14%	19%	25%	15%	22%	29%	40%
2	0%	0%	0%	12%	4%	2%	14%	11%
Not very Important 1	0%	1%	2%	16%	1%	2%	13%	12%

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

Sample Size: n=85

June 19, 2023

How important are the following factors in choosing your travel destination? Please rate the following list with 1 = not very important and 5 = Very important | Which activities would you participate in if you take a trip to Hawai'i? Select all that apply

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	57%	46%	39%	32%	34%	34%	18%	17%
■ 4	30%	36%	41%	30%	37%	37%	32%	32%
3	10%	15%	17%	19%	21%	23%	28%	33%
2	2%	3%	2%	10%	6%	4%	12%	10%
Not very Important 1	1%	1%	1%	10%	3%	3%	10%	8%

Not very Important 1 2 3 4 Very Important 5

Sample Size: n=690

June 19, 2023

How important are the following factors in choosing your travel destination? Please rate the following list with 1 = not very important and 5 = Very important | Which activities would you participate in if you take a trip to Hawai'i? Select all that apply

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	57%	47%	40%	30%	33%	31%	19%	17%
■ 4	28%	33%	37%	27%	36%	34%	26%	28%
■3	11%	15%	18%	22%	22%	24%	28%	33%
2	2%	2%	3%	10%	6%	6%	14%	11%
Not very Important 1	2%	2%	3%	11%	4%	4%	13%	10%

Not very Important 1 2 Very Important 5

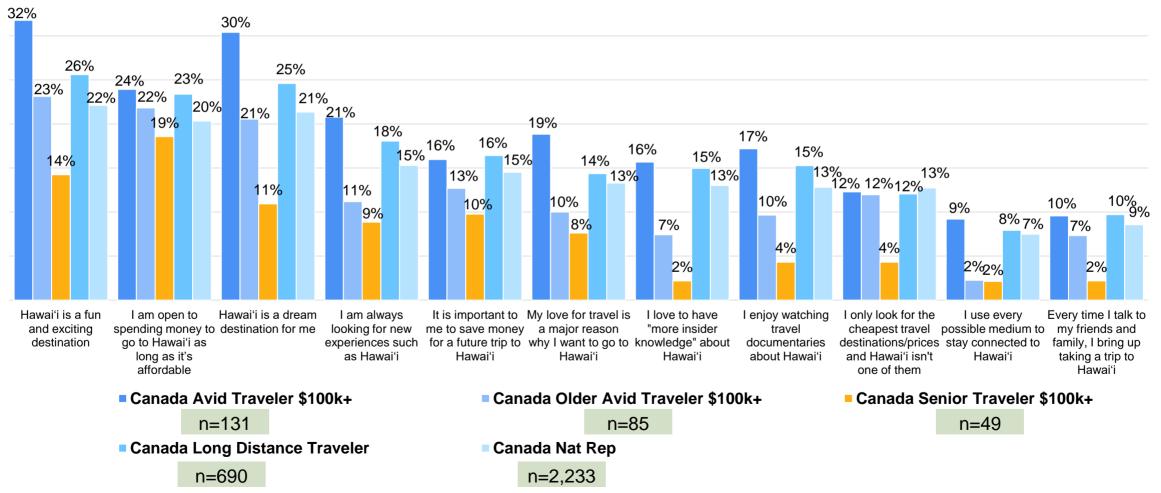
Sample Size: n=2,233

How important are the following factors in choosing your travel destination? Please rate the following list with 1 = not very important and 5 = Very important | Which activities would you participate in if you take a trip to Hawai'i? Select all that apply

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

				I	
ו	18%		52%		25%
Э	6% 18%		52%		22%
Э	6% 12%	16%	40%		26%
i	9%	21%	53	3%	14%
i	8% 10%	26%		40%	17%
i	6% 7%	29%		44%	14%
i	8%	23%	52	2%	14%
i	6% 8%	31%		38%	17%
ı	20%		36%	29%	12%
i	13% 2	20%	28%	30%	6 10%
i	21%	20%	24%	25	5% 9%

Hawai'i is a fun and exciting destination I am open to spending money to go to Hawai'i 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 Older Avid Travelers \$100k+: Hawai'i as an Aspirational Destination

Agreement Regarding Hawai'i as an Aspirational Destination

	14%			61	%				2	0%)
7%	10%	18%	6			48	%			16	%
8%	6%	22%				44%	6			19%	, 0
9%	7%		37%					39%			7%
7%	17%		30	%			3	4%		1	2%
6%	13%		41	%				33%			7%
6%	13%		29%				4	6%			6%
11%	14%	6	3	4%				32%			9%
7%	2	28%			34%	6		18%	6	1	2%
2	0%		32%				35	%		12	2%
	22%		25%				33%		12%	, 0	8%

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

n	18%		55	%			24%	6
е	1	9%	Ę	51%			229	%
е	5% 7%	23%		40%			24%	6
ʻi	<mark>5%</mark> 6%	30%		2	43%		1	6%
ʻi	7% 12%	27%)		37%		1	6%
ʻi	<mark>5%</mark> 10%	30%			42%			12%
ʻi	<mark>5%</mark> 8%	28%			46%			13%
ʻi	6% 9%	32%			38%			14%
n	<mark>5%</mark> 209	%	34%			30%		12%
ʻi	14%	22%		34%		23%	/ 0	7%
ʻi	21%	20%		27%		22%		10%

Hawai'i is a fun and exciting destination I am open to spending money to go to Hawai'i as long as it's affordable Hawai'i is a dream destination for me I am always looking for new experiences such as Hawai' It is important to me to save money for a future trip to Hawai' My love for travel is a major reason why I want to go to Hawai I love to have "more insider knowledge" about Hawai' I enjoy watching travel documentaries about Hawai 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' Every time I talk to my friends and family, I bring up taking a trip to Hawai'

Strongly disagree Disagree Neither agree nor disagree Agree Strongly agree

Canada Nat Rep: Hawai'i as an Aspirational Destination

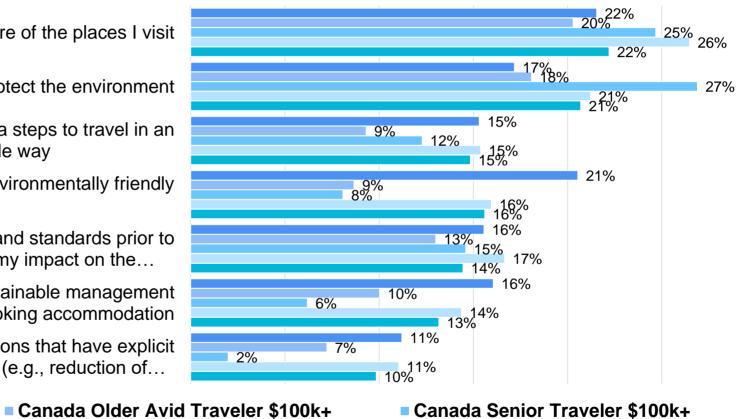
Agreement Regarding Hawai'i as an Aspirational Destination

		26%	/ 0			48	%			2	21%	I
;	7% 6%		24%			2	45%	/ 0		·	19%	, D
;	10%	10%		27%			3	33%		2	20%)
	9% 1	0%		33%				35	%		1:	3%
	12%	14%	%	29	9%			3	0%		14	1%
	11%	13%		32	%			3	32%		1	2%
	8% 1	0%		31%				399	%		1	2%
	9%	12%		34%	, 0			3	33%		1	2%
	8%	17%		3	36%				26%		1:	3%
	219	%	2	2%			33%	6		18%		6%
	2	7%		21%			27	%		18%		8%

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

Canada Avid Traveler \$100k+

n=131

Canada Long Distance Traveler

n=690

n=85 Canada Nat Rep

n=2.233

n=49

June 19, 2023 Please indicate your level of agreement or disagreement with each of the following statements regarding sustainability and environmental practices while you are travelling. | Please indicate the extent to which you agree or disagree with the following statements about sustainability of culture and community.

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

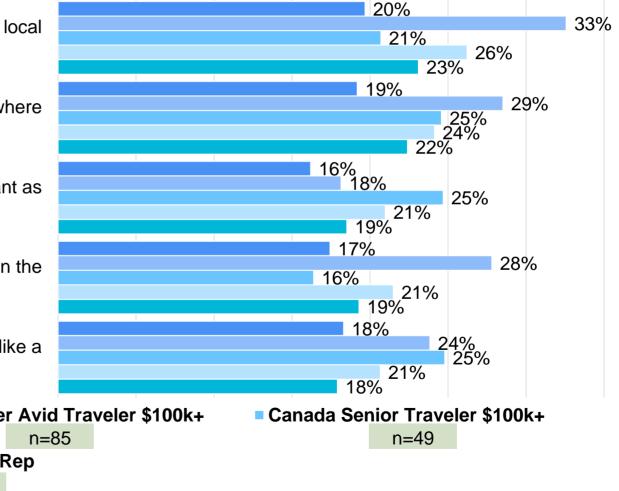
Canada Avid Traveler \$100k+ n=131 Canada Long Distance Traveler

n=690

June 19, 2023

Canada Older Avid Traveler \$100k+ n=85 Canada Nat Rep

n=2.233



Please indicate your level of agreement or disagreement with each of the following statements regarding sustainability and environmental practices while you are travelling. | Please indicate the extent to which you agree or disagree with the following statements about sustainability of culture and community.

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

Agreement Regarding Sustainable Practices While Traveling

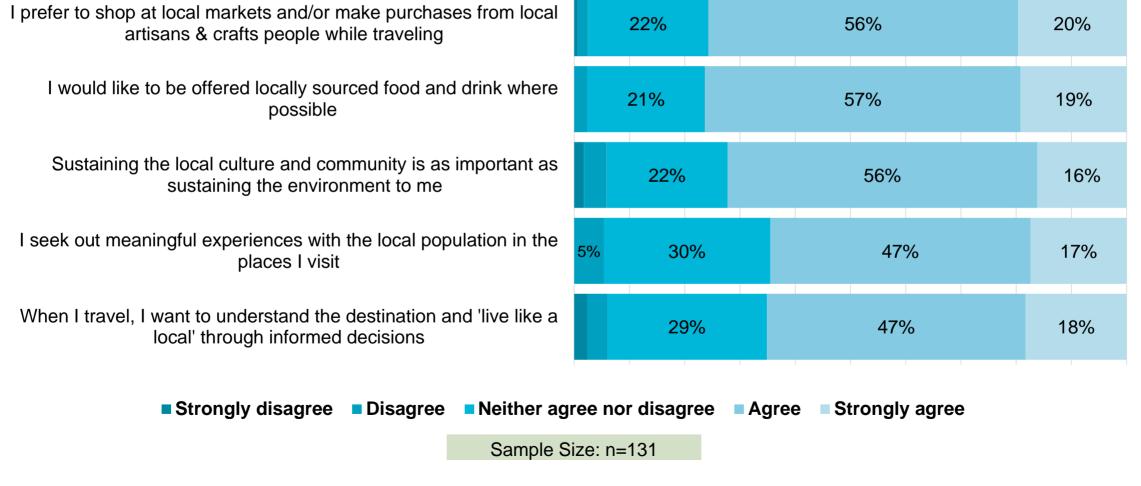
feel personal responsibility to take care of the places I visit 5% 6% 19% 49% 22% practice 'leave no trace' when traveling to protect the environment 6% 31% 44% 17% care about the environment and take extra steps to travel in an 8% 29% 45% 15% environmentally responsible way prioritize comfort and value for money over environmentally friendly 11% 25% 40% 21% 'green' practices take the time to learn about local norms and standards prior to travelling 9% 23% 48% 16% to a destination to reduce my impact on the environment/historic sites would like to have information about the sustainable management 9% 6% 27% 42% 16% policies of hotels and guesthouses when booking accommodation would be willing to pay more for tourism destinations that have explicit 22% 19% 42% 11% 5% components that are environmentally friendly (e.g., reduction of waste,

Strongly disagree Disagree Neither agree nor disagree Agree Strongly agree

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

Agreement Regarding Sustaining Local Culture While Traveling



June 19, 2023 Please indicate your level of agreement or disagreement with each of the following statements regarding sustainability and environmental practices while you are travelling. | Please indicate the extent to which you agree or disagree with the following statements about sustainability of culture and community.

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

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Agreement Regarding Sustainable Practices While Traveling

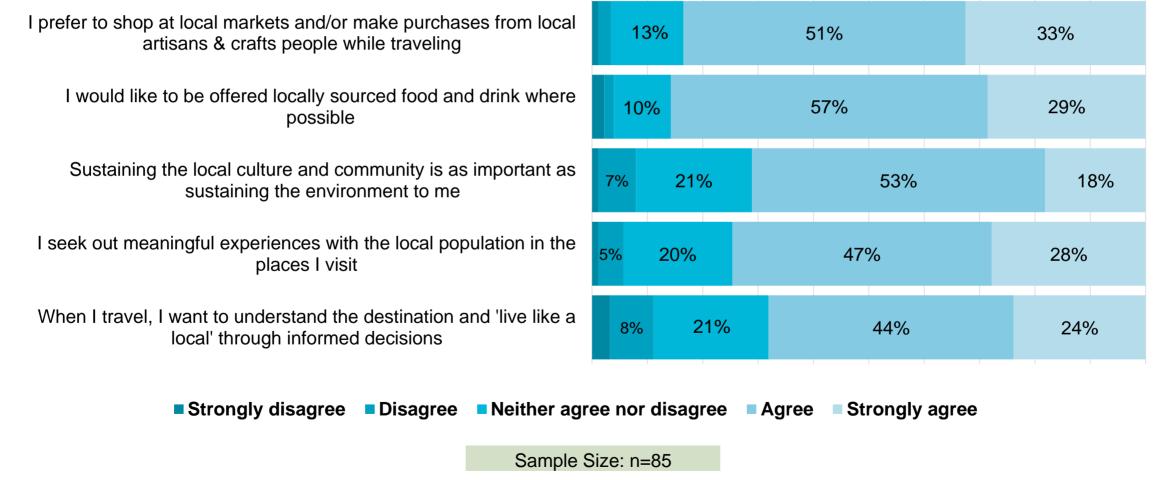
feel personal responsibility to take care of the places I visit	13	%	63	3%		20	%
practice 'leave no trace' when traveling to protect the environment	7% 23%		50%		18	8%	
care about the environment and take extra steps to travel in an environmentally responsible way	7%	319	%	50)%		9%
prioritize comfort and value for money over environmentally friendly 'green' practices	209	%	36%		36%		9%
take the time to learn about local norms and standards prior to travelling to a destination to reduce my impact on the environment/historic sites	10%	25%		50%			13%
would like to have information about the sustainable management policies of hotels and guesthouses when booking accommodation	9%	3	6%		42%		10%
would be willing to pay more for tourism destinations that have explicit components that are environmentally friendly (e.g., reduction of waste,		24%	37%	%	28%	, D	7%
Strongly disagree Disagree Neither age		-	Agree	Strongly ag	ree		

June 19, 2023 Please indicate your level of agreement or disagreement with each of the following statements regarding sustainability and environmental practices while you are travelling. | Please indicate the extent to which you agree or disagree with the following statements about sustainability of culture and community.

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

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Agreement Regarding Sustaining Local Culture While Traveling



June 19, 2023 Please indicate your level of agreement or disagreement with each of the following statements regarding sustainability and environmental practices while you are travelling. | Please indicate the extent to which you agree or disagree with the following statements about sustainability of culture and community.

Canada Avid Travelers Long Distance Traveler: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustainable Practices While Traveling

feel personal responsibility to take care of the places I visit	16%		52%				26%		
practice 'leave no trace' when traveling to protect the environment	6	5%	26	6%		44%		21	%
care about the environment and take extra steps to travel in an environmentally responsible way	ę	9%		31%		43	%		15%
prioritize comfort and value for money over environmentally friendly 'green' practices		12%		30%		3	9%		16%
take the time to learn about local norms and standards prior to travelling to a destination to reduce my impact on the environment/historic sites		8%		27%		45%	, D		17%
would like to have information about the sustainable management policies of hotels and guesthouses when booking accommodation	5%	119	%	30%			40%		14%
would be willing to pay more for tourism destinations that have explicit components that are environmentally friendly (e.g., reduction of waste,	6%		20%		33%		30%		11%
Strongly disagree	ree	nor	disag	ree Ag	jree 🔳	Strongly a	gree		

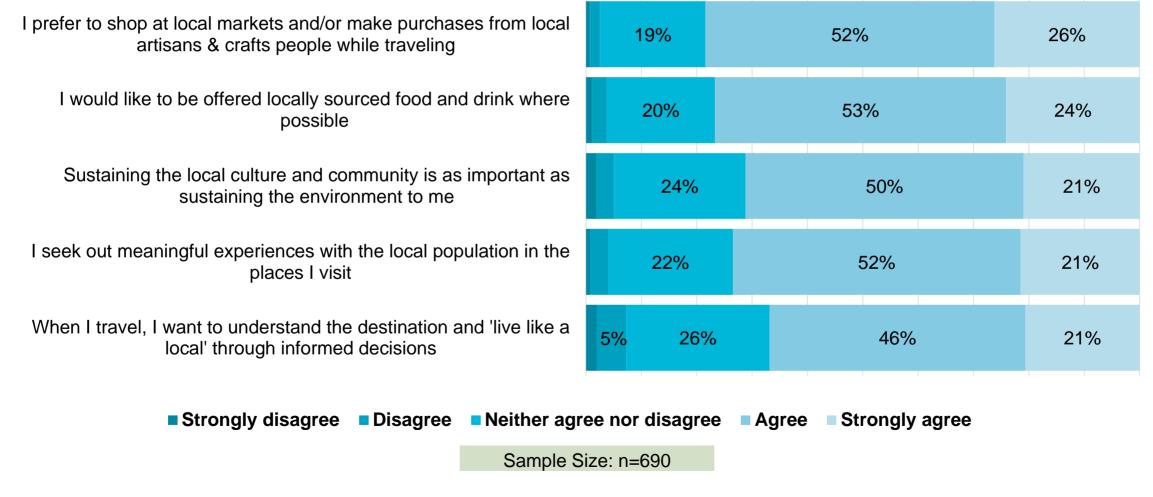
Sample Size: n=690

Please indicate your level of agreement or disagreement with each of the following statements regarding sustainability and environmental practices while you are travelling. | Please indicate the extent to which you agree or disagree with the following statements about sustainability of culture and community.

Canada Avid Travelers Long Distance Traveler: Sustainability and Travel Responsibility Statements

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Agreement Regarding Sustaining Local Culture While Traveling



June 19, 2023 Please indicate your level of agreement or disagreement with each of the following statements regarding sustainability and environmental practices while you are travelling. | Please indicate the extent to which you agree or disagree with the following statements about sustainability of culture and community.

Canada Avid Travelers Nat Rep: Sustainability and Travel Responsibility Statements

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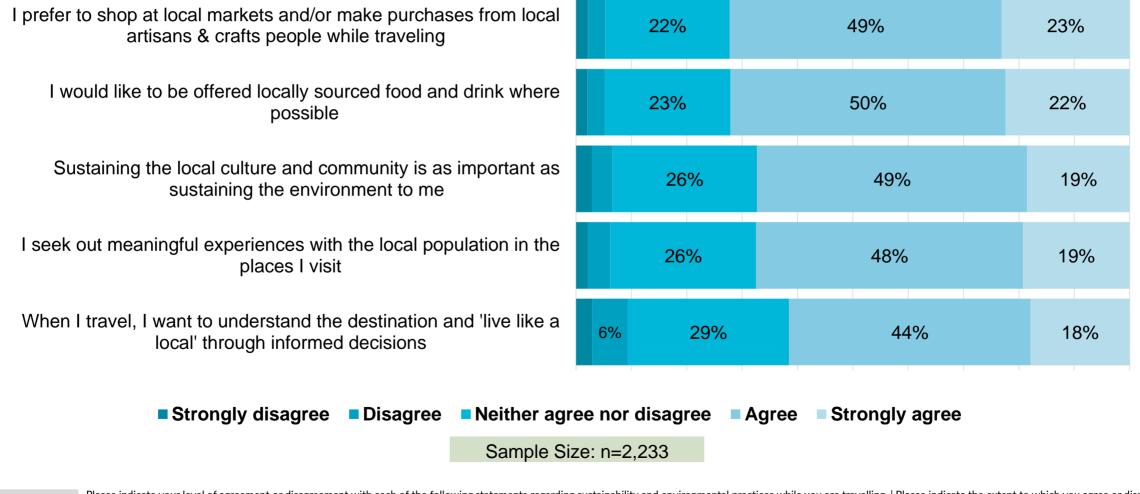
Agreement Regarding Sustainable Practices While Traveling

feel personal responsibility to take care of the places I visit		17	%	5	53%		22	%
practice 'leave no trace' when traveling to protect the environment	6	6% 25%		44%		44%		%
care about the environment and take extra steps to travel in an environmentally responsible way		8%	31%		4	2%		15%
prioritize comfort and value for money over environmentally friendly 'green' practices		11%	33%	, D	:	37%		6%
take the time to learn about local norms and standards prior to travelling to a destination to reduce my impact on the environment/historic sites	5%	9%	30%		4	2%		14%
would like to have information about the sustainable management policies of hotels and guesthouses when booking accommodation	6%	11%	319	%		39%		13%
would be willing to pay more for tourism destinations that have explicit components that are environmentally friendly (e.g., reduction of waste,	10	% 1	8%	34%		29%		10%
Strongly disagree	ree	nor dis	agree 🔳 A	gree 🛛 S	trongly a	gree		
Sample S	ize:	n=2,233	3					

June 19, 2023 Please indicate your level of agreement or disagreement with each of the following statements regarding sustainability and environmental practices while you are travelling. | Please indicate the extent to which you agree or disagree with the following statements about sustainability of culture and community.

Canada Avid Travelers Nat Rep: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling

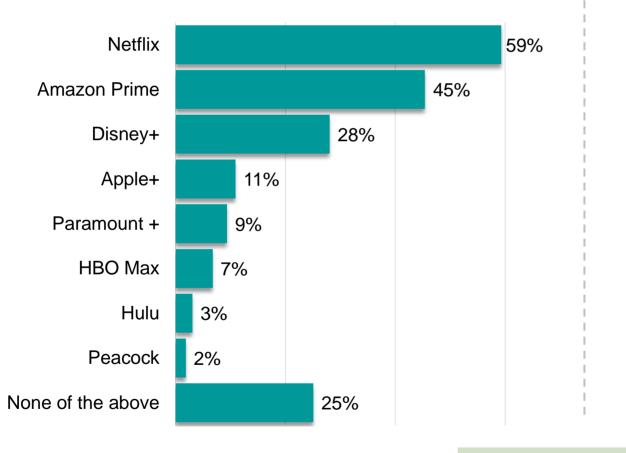


June 19, 2023

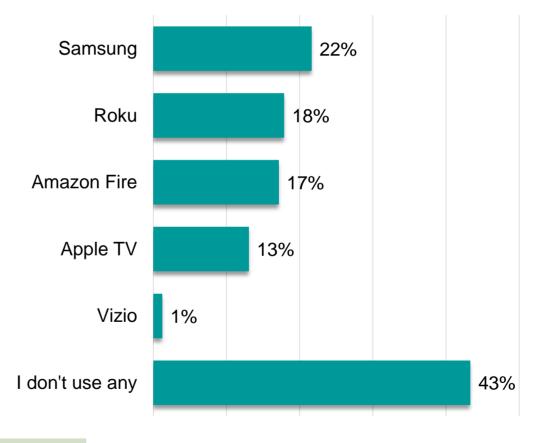
Please indicate your level of agreement or disagreement with each of the following statements regarding sustainability and environmental practices while you are travelling. | Please indicate the extent to which you agree or disagree with the following statements about sustainability of culture and community.

Canada Media Consumption

Streaming Platforms used Weekly



Connected Device Used



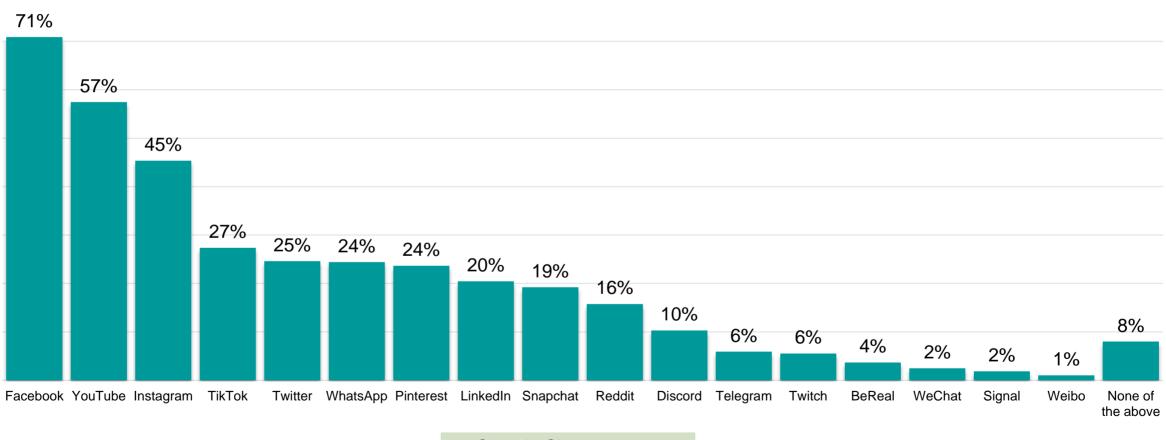
Sample Size: n=2,233

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**

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Canada Media Consumption

Social Media Platforms used Weekly



Sample Size: n=2,233

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**

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Canada Media Consumption

Travel Destination Source of Awareness

	-
TV Program/Documentary	22%
Online	37%
Radio	9%
TV commercials	26%
Newspaper	13%
Friends/Family	51%
Social Media	35%
YouTube	28%
Out of home advertising (e.g., poster billboards, bus shelter advertisements, etc.)	8%
Email	17%
I don't recall	13%

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	45%
I look up the destination on social media	22%
I talk to friends/family about the destination	34%
I book travel to the destination almost immediately	6%
I don't do anything	22%
None of the above	6%

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