



Vision Insights

Canada Traveler Profiles

Q2 2024

July 24, 2024



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
- 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

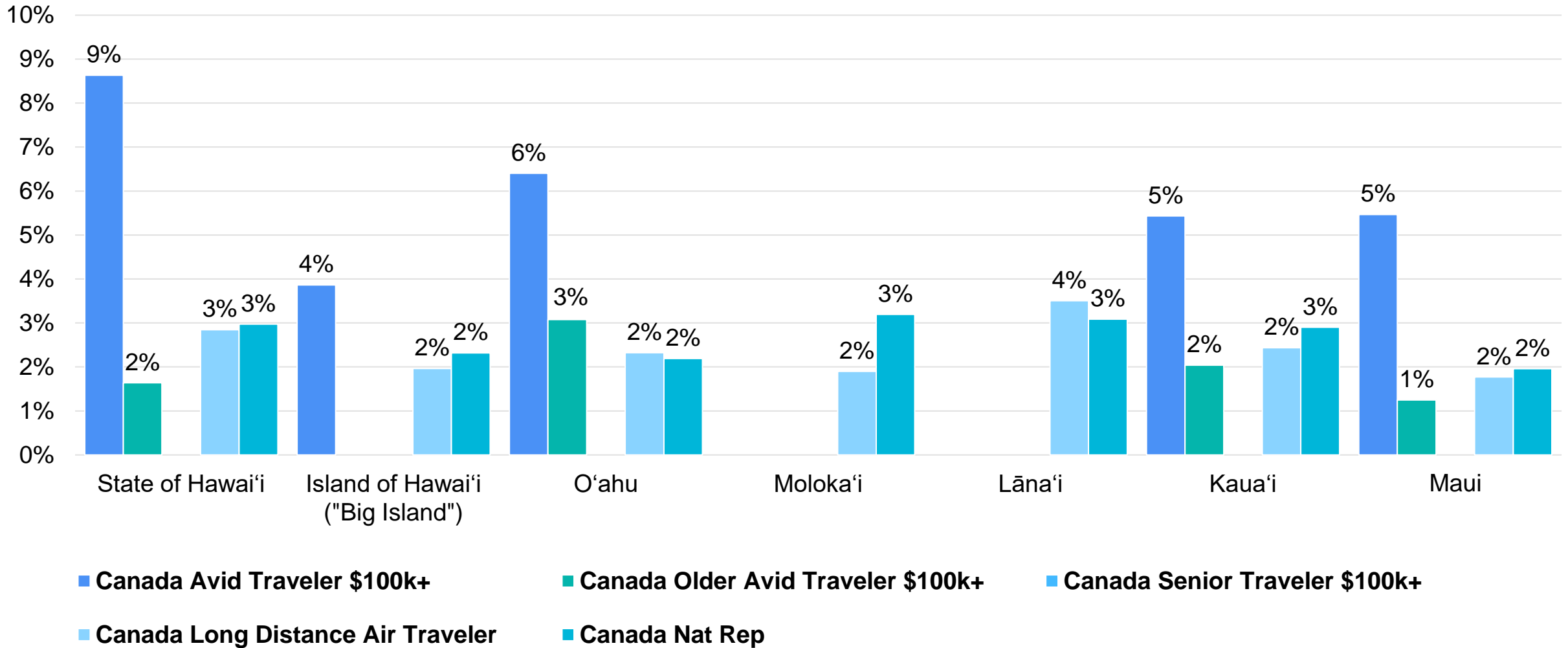
Older Avid Traveler \$100k+

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

Senior Traveler \$100k+

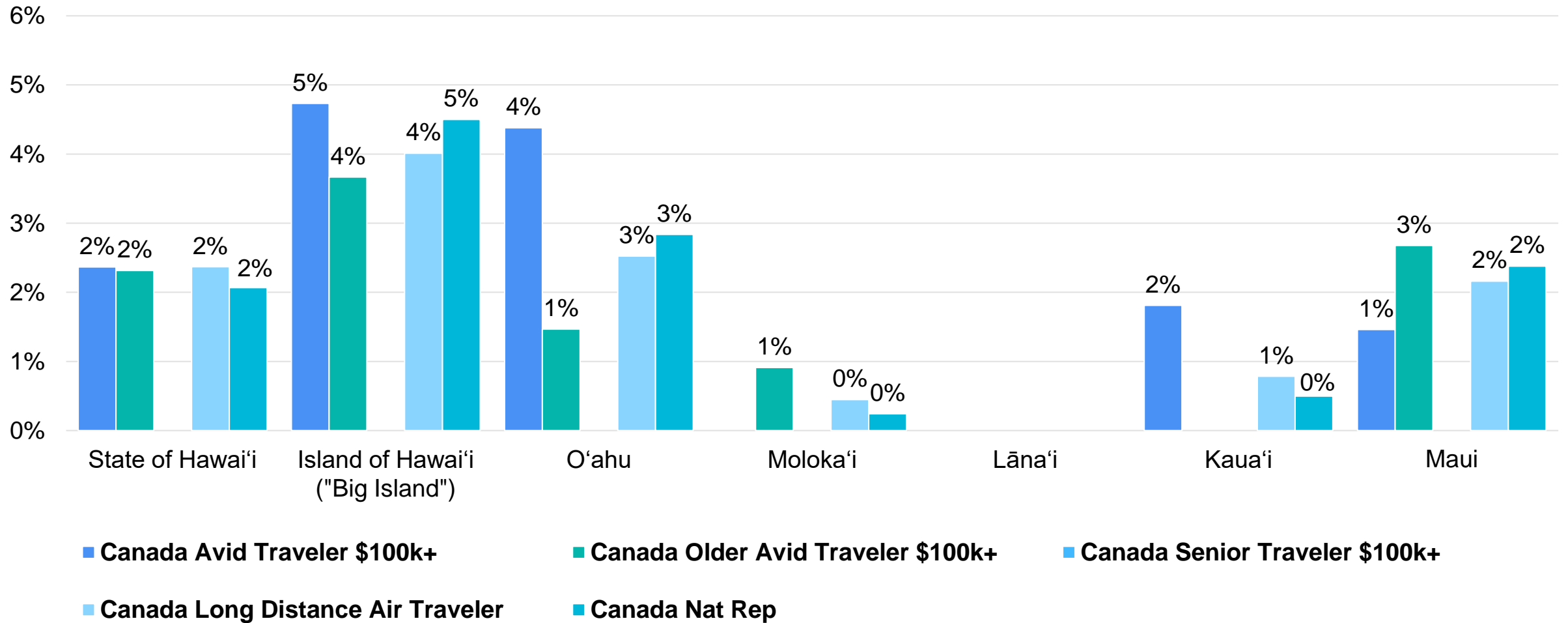
- Gross household income is \$100k+
- Age is 64+
- Been to Hawai'i (ever)

Canada - Leisure Trip in Past 12 Months



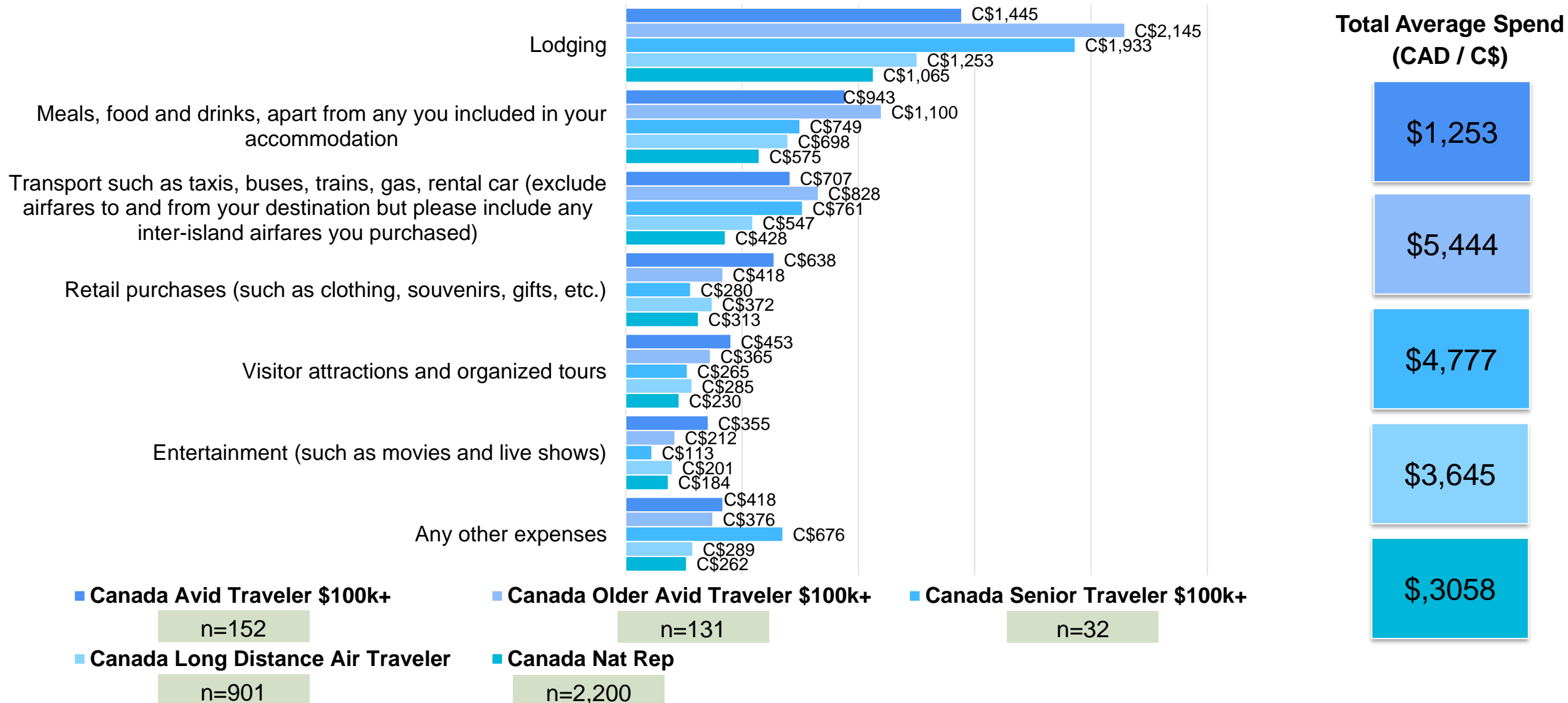
Sample Min. n=50

Canada - Next Destination for Leisure Trip



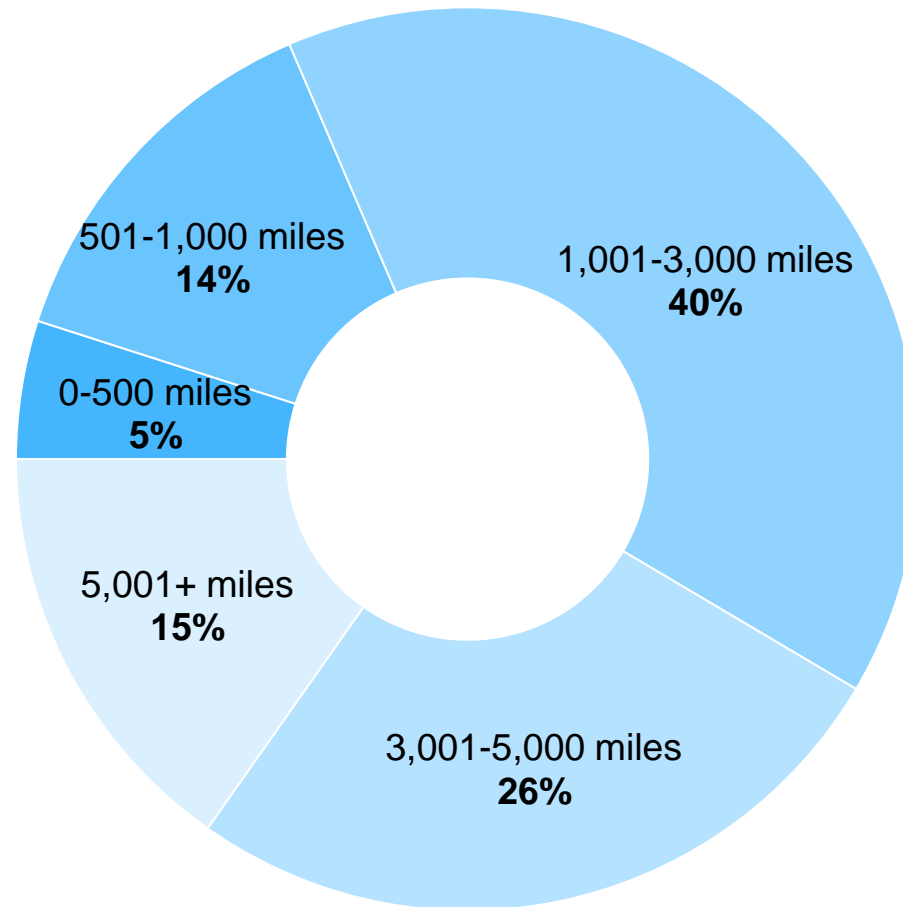
Sample Min. n=75

Canada - Total Annual Holiday Spend



Canada Avid Travelers \$100k+: Annual Vacation

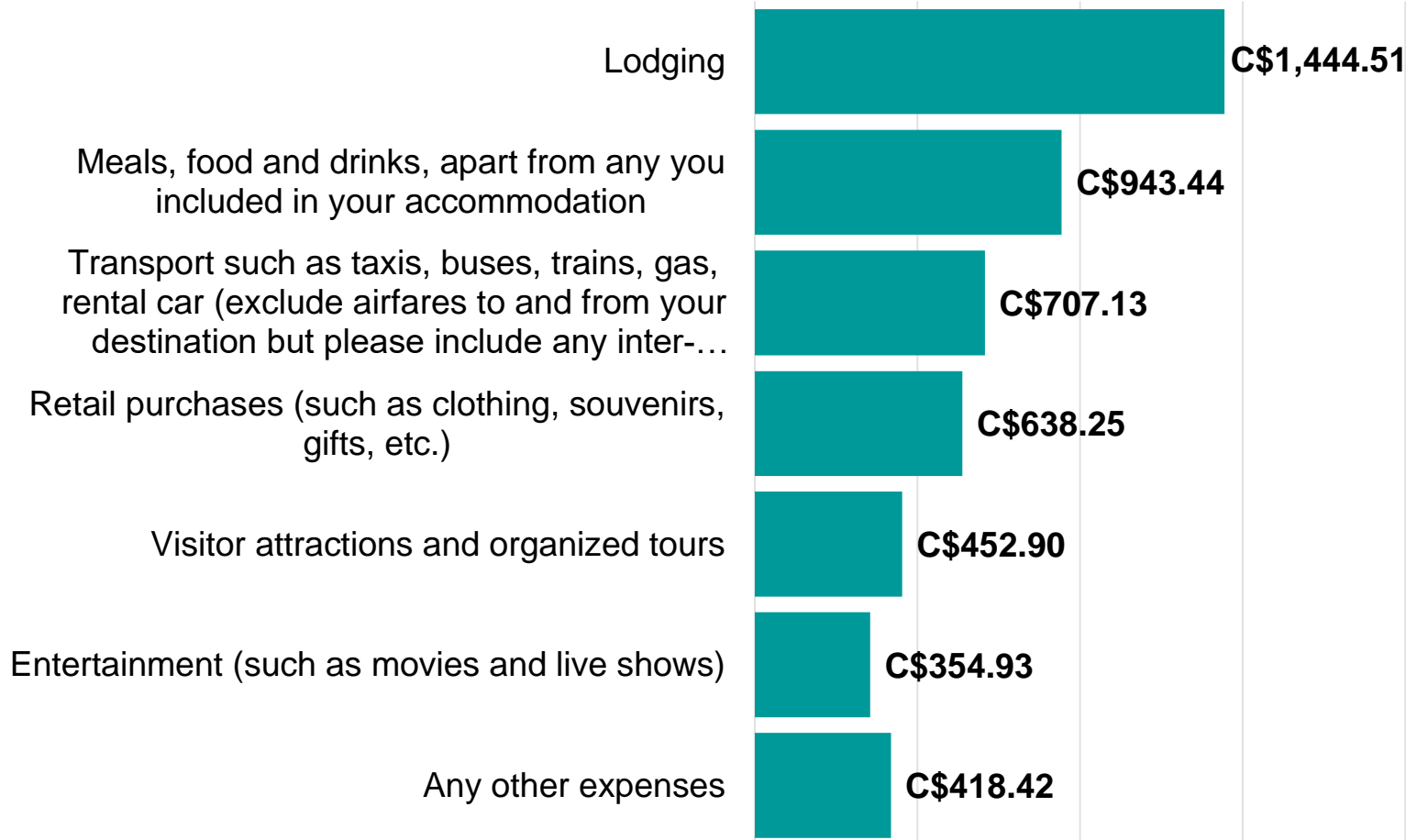
Distance Travelled on Annual Vacation



Sample Size: n=152

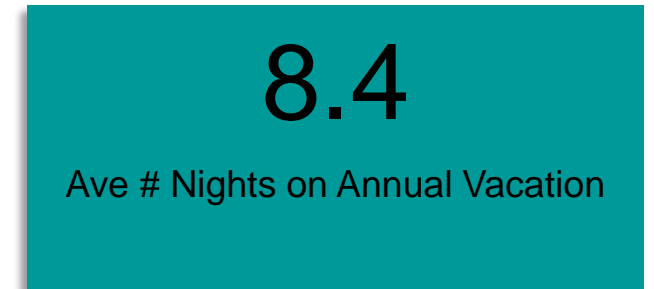
Canada Avid Travelers \$100k+: Annual Vacation

Average Spend



Sample Size: n=152

Spend Per Person Per Day

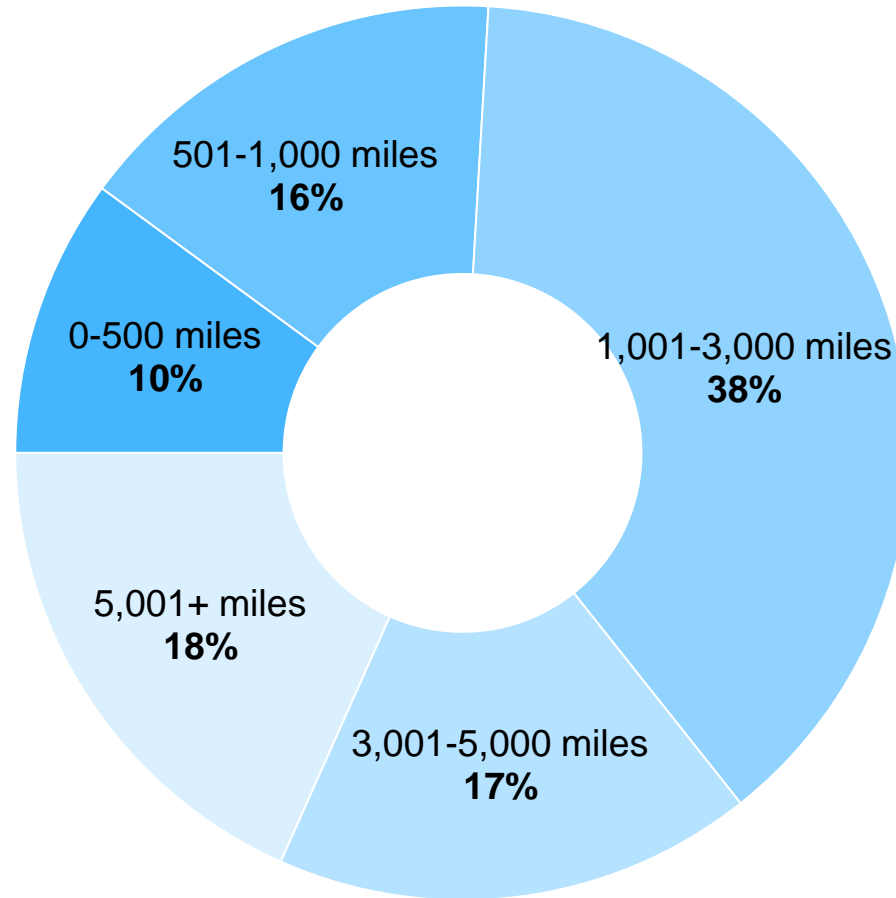


C\$210.78

Ave. Per Person Per Day Spend

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

Distance Travelled on Annual Vacation



Sample Size: n=131

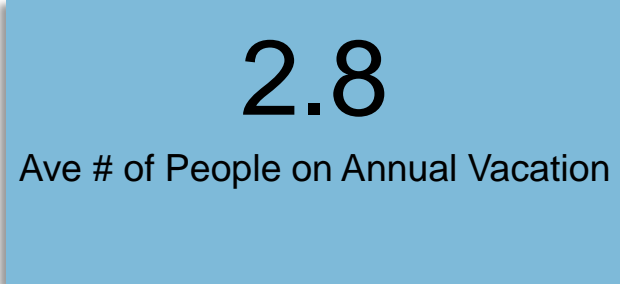
Canada Older Avid Travelers \$100k+: Annual Vacation

Average Spend



Sample Size: n=131

Spend Per Person Per Day



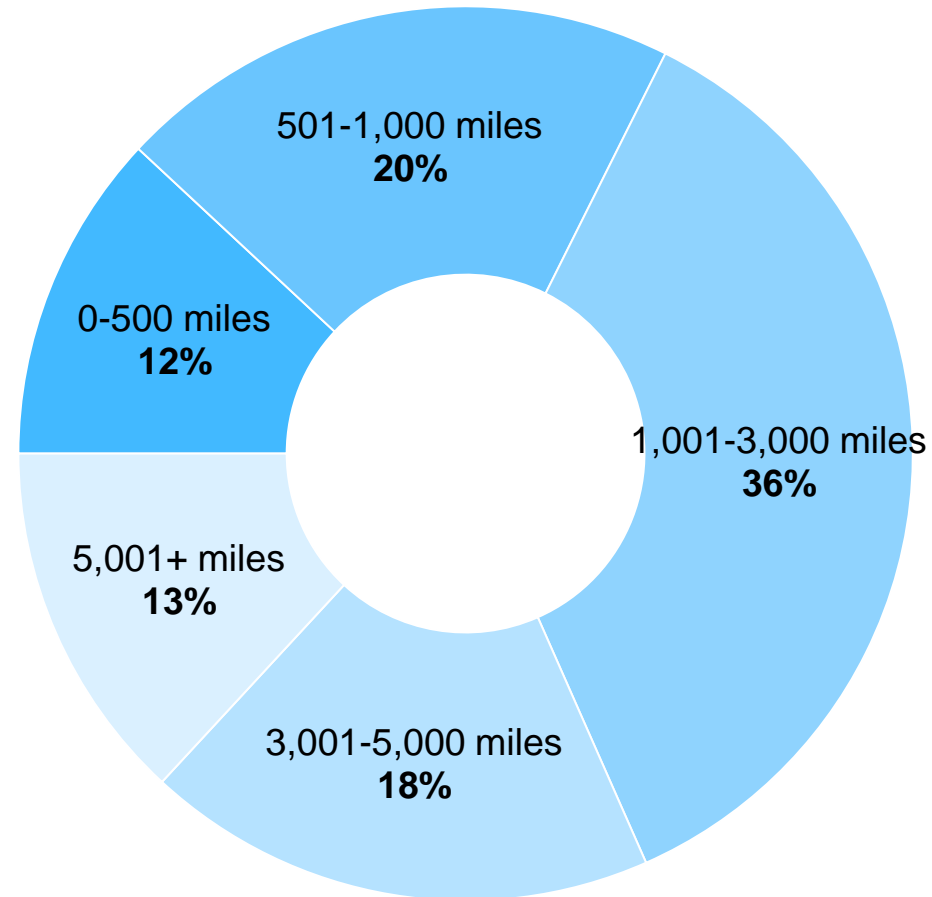
C\$215.01

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=901

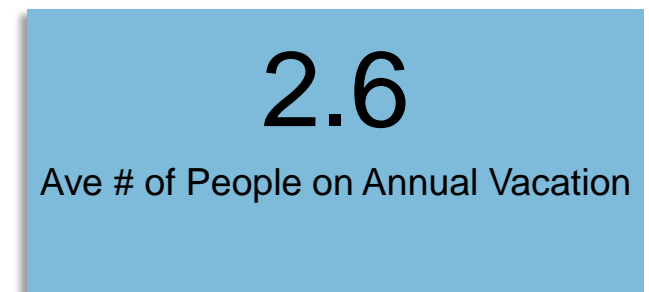
Canada Long-Distance Travelers: Annual Vacation

Average Spend



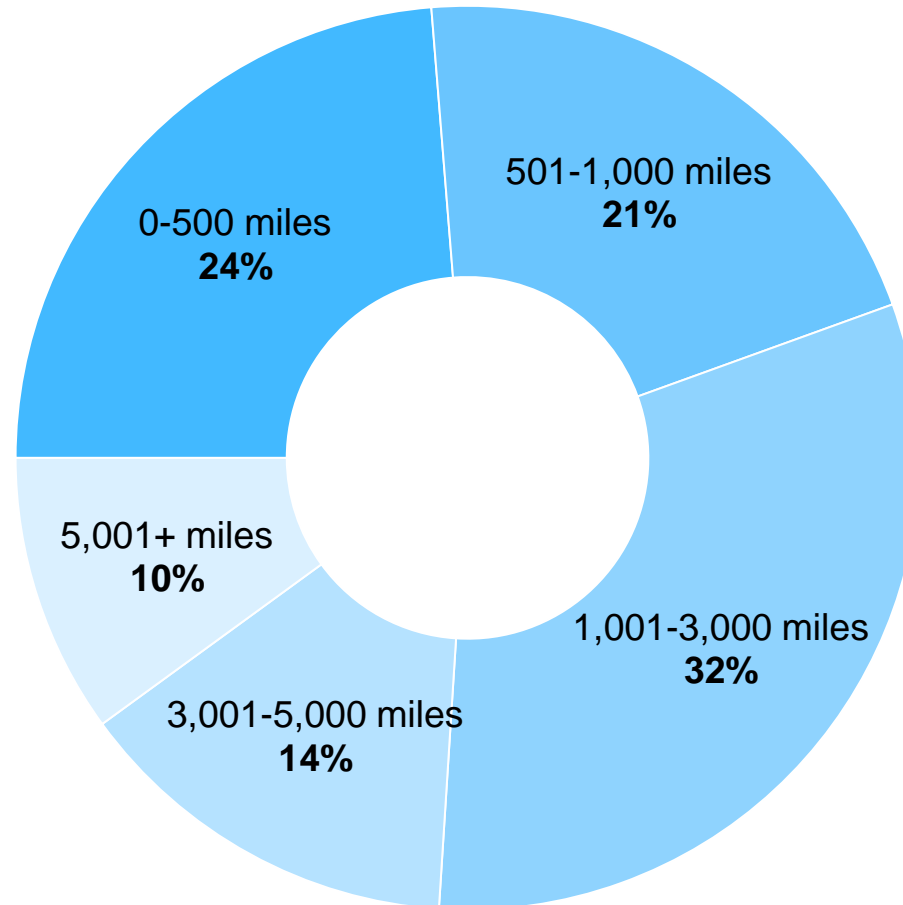
Sample Size: n=901

Spend Per Person Per Day



Canada Nat Rep: Annual Vacation

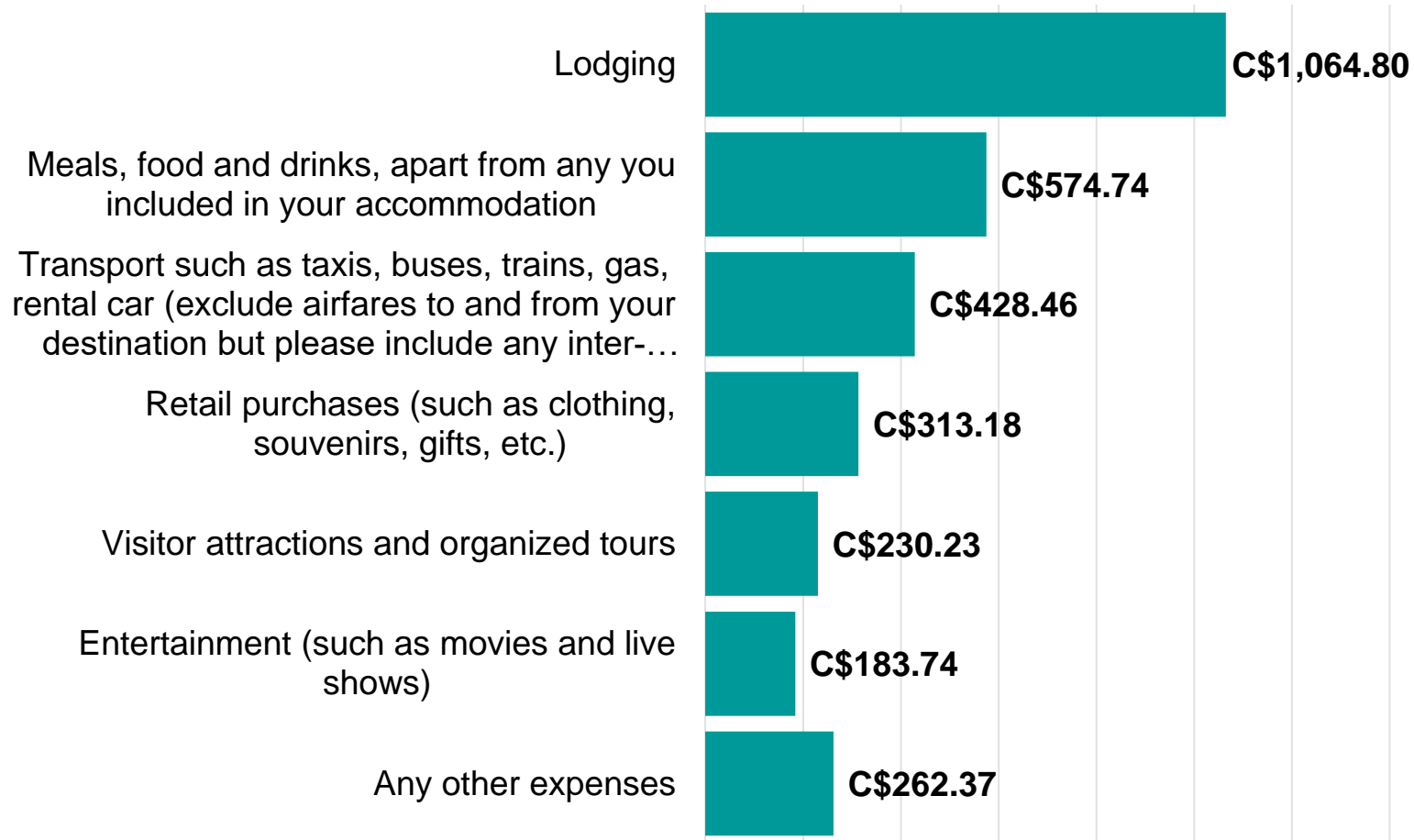
Distance Travelled on Annual Vacation



Sample Size: n=2,200

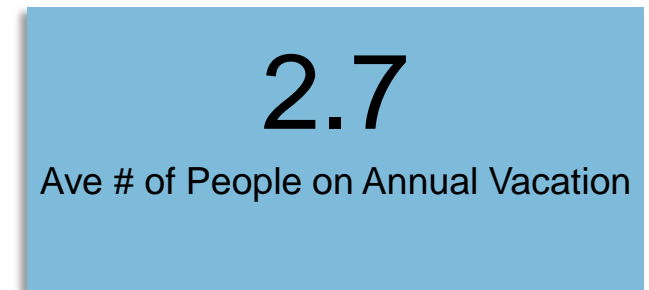
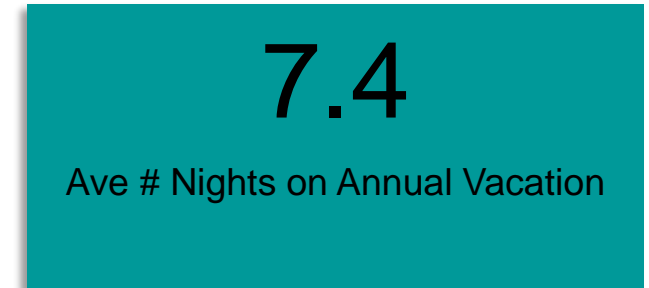
Canada Nat Rep: Annual Vacation

Average Spend



Sample Size: n=2,200

Spend Per Person Per Day



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	50%	54%	47%	59%	57%
Comfort and accessibility	51%	48%	34%	50%	49%
Natural attractions/activities	49%	45%	37%	47%	43%
Family friendly locations and activities	42%	25%	25%	33%	33%
Opportunity to experience local restaurants/businesses	42%	34%	25%	40%	36%
Cultural attractions	39%	32%	38%	37%	35%
Entertainment and nightlife	34%	20%	13%	25%	24%
Consideration of sustainable principles	22%	18%	6%	21%	22%

Sample Size:

n=152

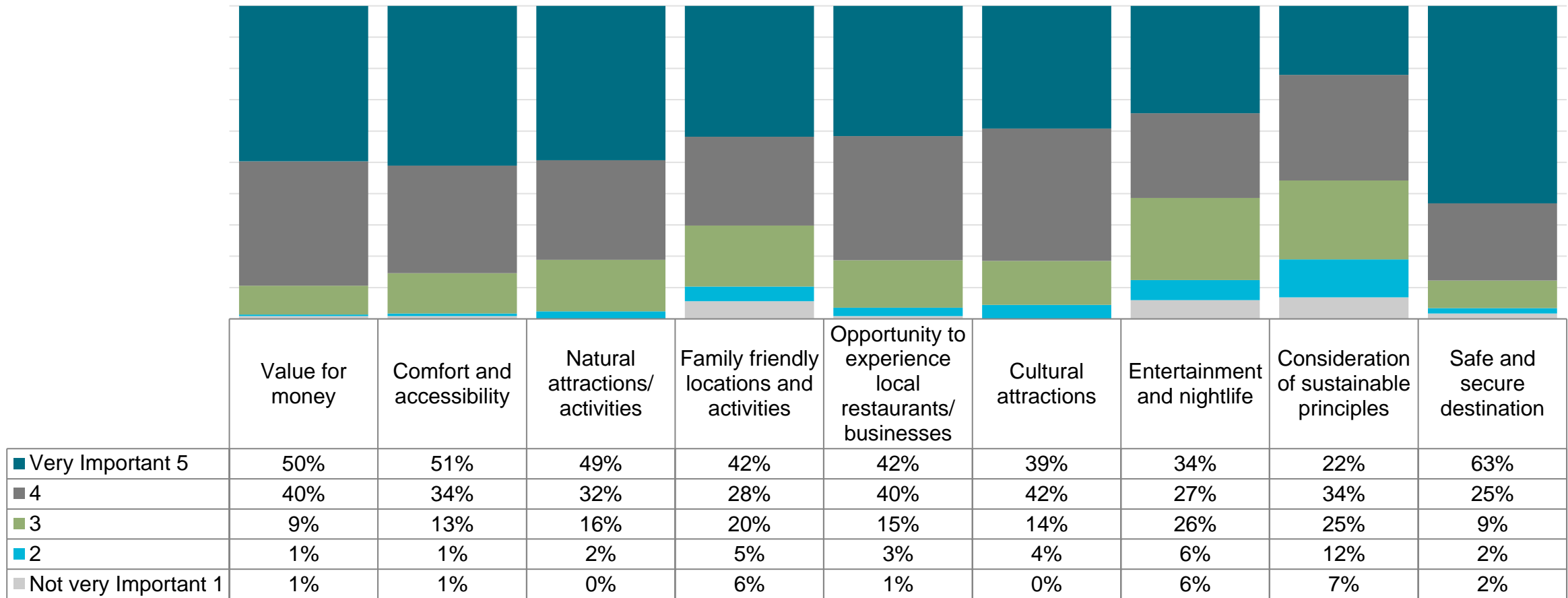
n=131

n=32

n=901

n=2,200

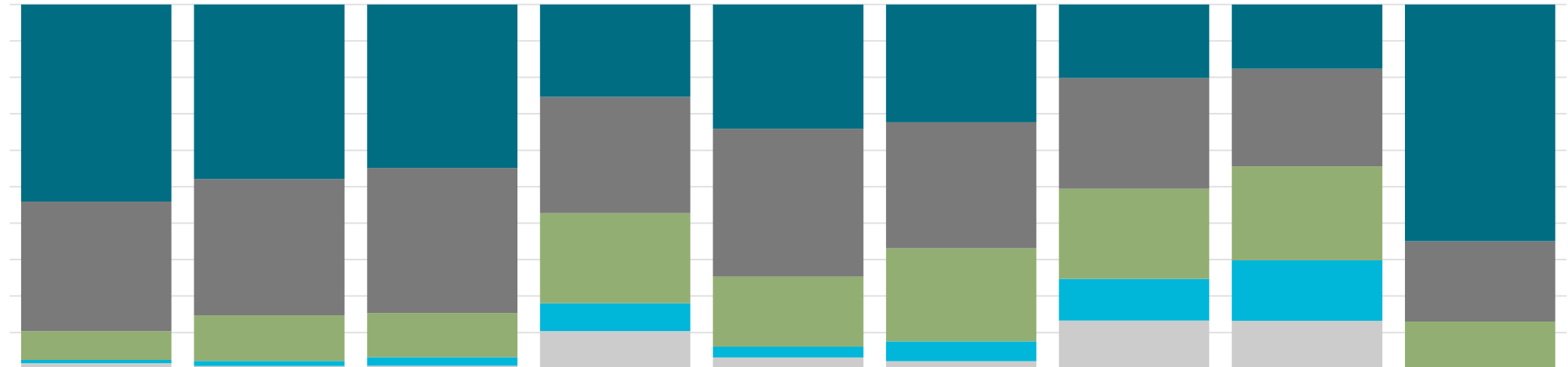
Canada Avid Travelers \$100k+: Importance of Travel Factors



Not very Important 1
 2
 3
 4
 Very Important 5

Sample Size: n=152

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

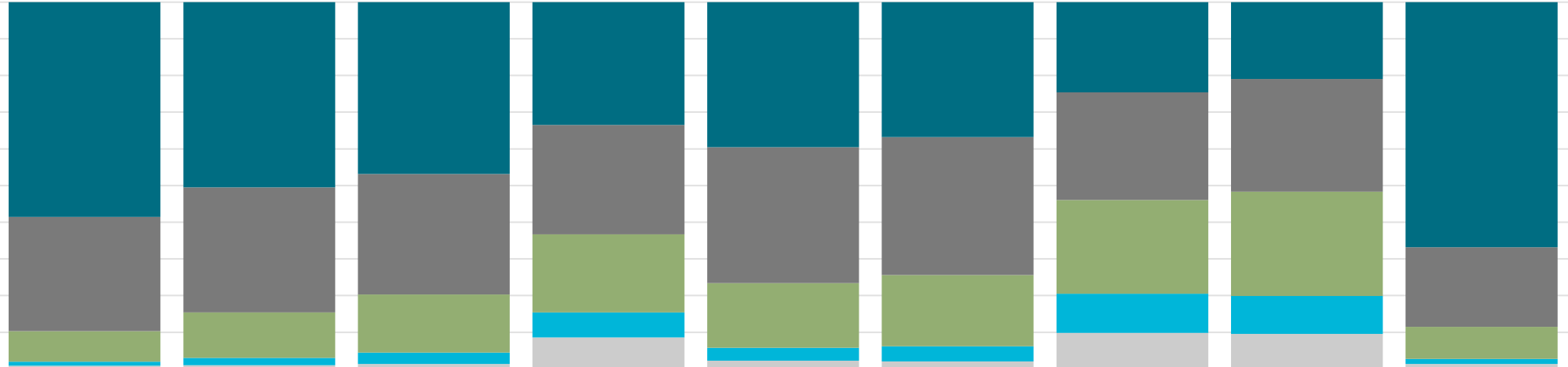


	Value for money	Comfort and accessibility	Natural attractions/activities	Family friendly locations and activities	Opportunity to experience local restaurants/businesses	Cultural attractions	Entertainment and nightlife	Consideration of sustainable principles	Safe and secure destination
Very Important 5	54%	48%	45%	25%	34%	32%	20%	18%	65%
4	36%	37%	40%	32%	41%	35%	30%	27%	22%
3	8%	13%	12%	25%	19%	26%	25%	26%	13%
2	1%	1%	2%	8%	3%	5%	11%	17%	0%
Not very Important 1	2%	1%	1%	10%	3%	2%	13%	13%	0%

Not very Important 1
 2
 3
 4
 Very Important 5

Sample Size: n=131

Canada Long Distance Travelers: Importance of Travel Factors

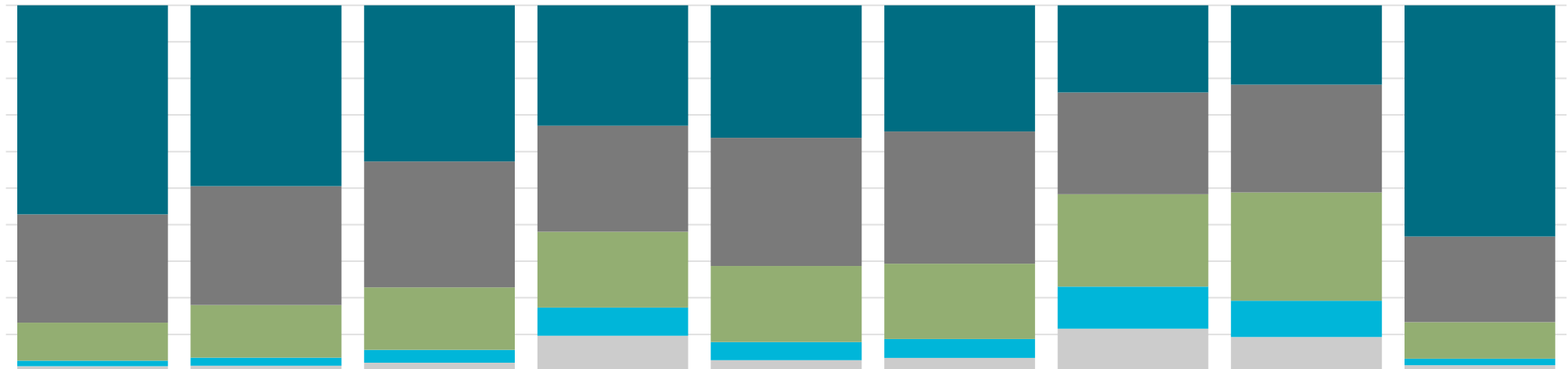


	Value for money	Comfort and accessibility	Natural attractions/activities	Family friendly locations and activities	Opportunity to experience local restaurants/businesses	Cultural attractions	Entertainment and nightlife	Consideration of sustainable principles	Safe and secure destination
Very Important 5	59%	50%	47%	33%	40%	37%	25%	21%	67%
4	31%	34%	33%	30%	37%	38%	29%	31%	22%
3	8%	12%	16%	21%	18%	19%	26%	28%	9%
2	1%	2%	3%	7%	3%	4%	11%	10%	1%
Not very Important 1	1%	1%	1%	9%	2%	2%	10%	10%	1%

Not very Important 1
 2
 3
 4
 Very Important 5

Sample Size: n=901

Canada Nat Rep: Importance of Travel Factors



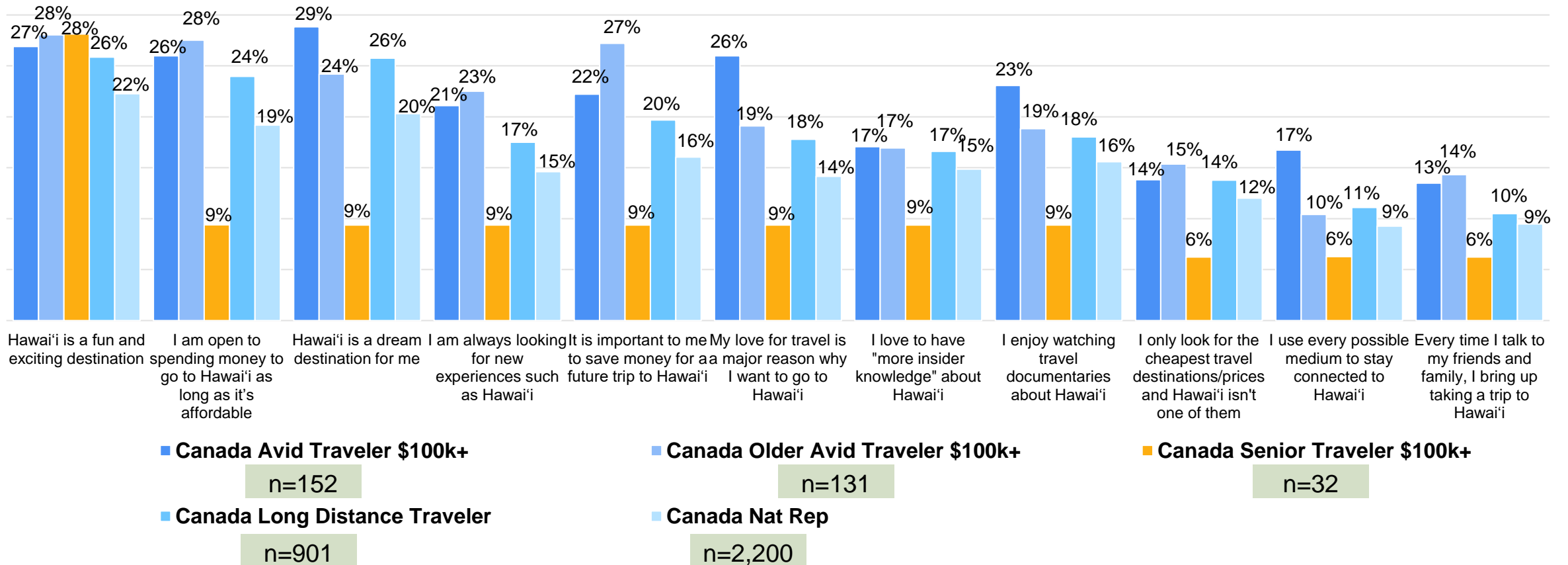
	Value for money	Comfort and accessibility	Natural attractions/activities	Family friendly locations and activities	Opportunity to experience local restaurants/businesses	Cultural attractions	Entertainment and nightlife	Consideration of sustainable principles	Safe and secure destination
Very Important 5	57%	49%	43%	33%	36%	35%	24%	22%	63%
4	30%	33%	34%	29%	35%	36%	28%	29%	23%
3	10%	14%	17%	21%	21%	21%	25%	30%	10%
2	2%	2%	4%	8%	5%	5%	11%	10%	2%
Not very Important 1	1%	1%	2%	10%	3%	4%	12%	9%	2%

Not very Important 1
 2
 3
 4
 Very Important 5

Sample Size: n=2,200

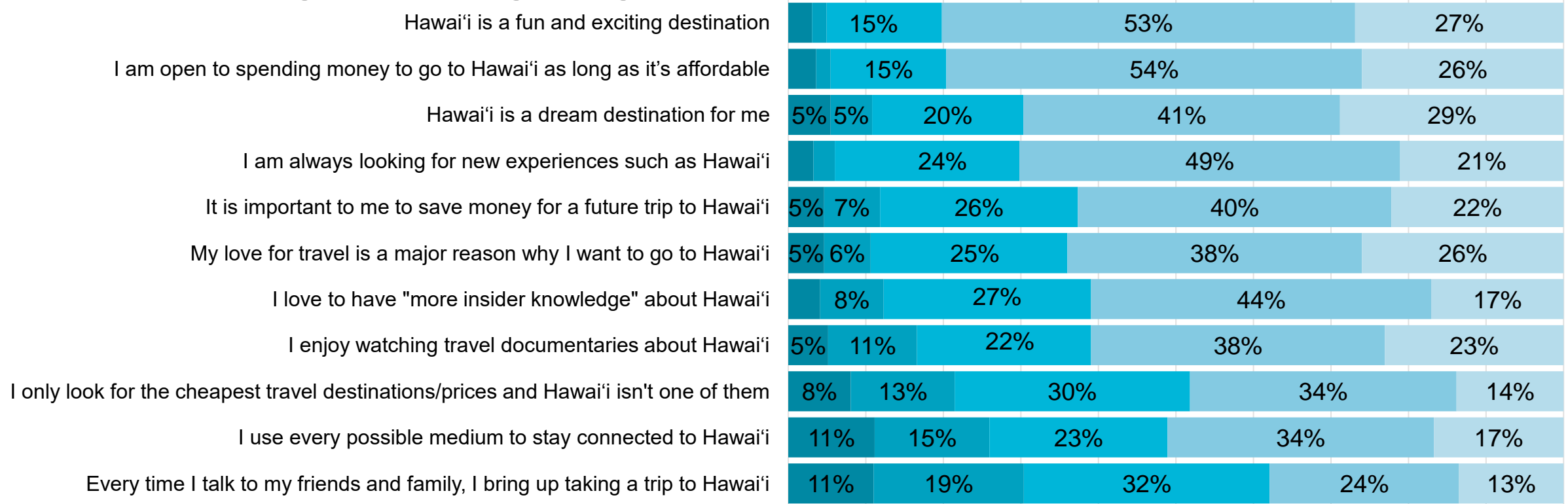
Canada - Hawai'i as an Aspirational Destination

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

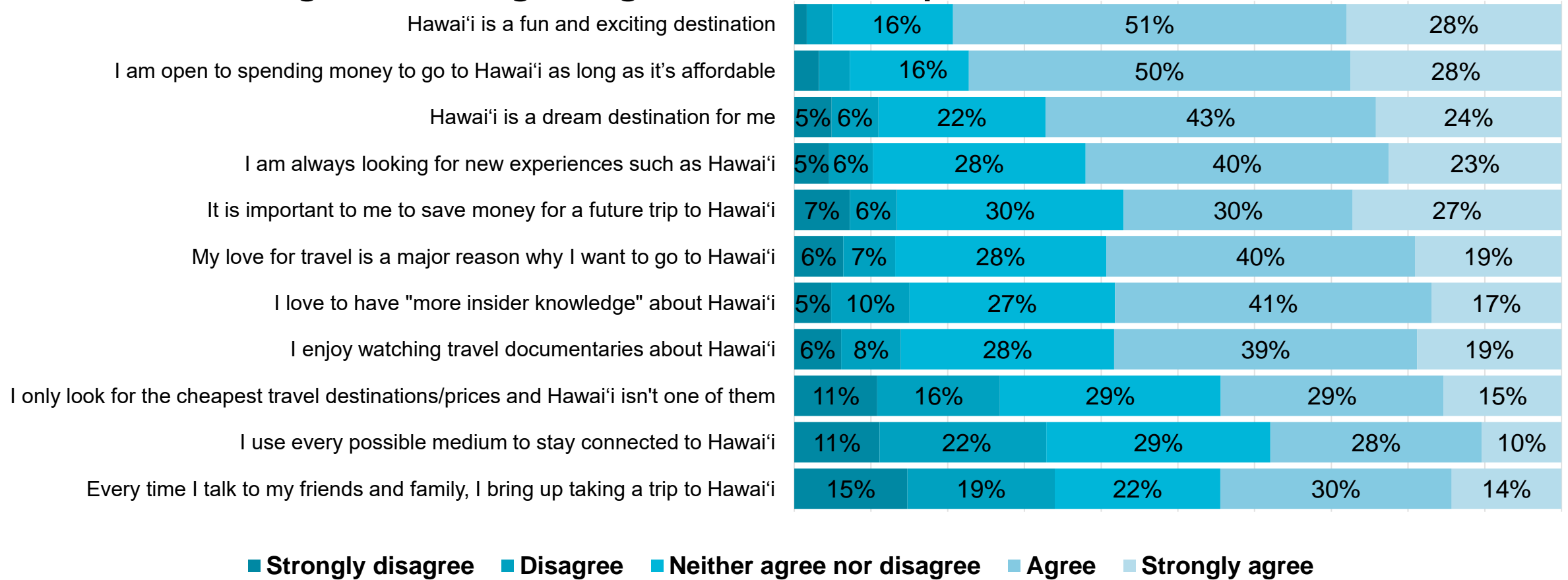


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=152

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

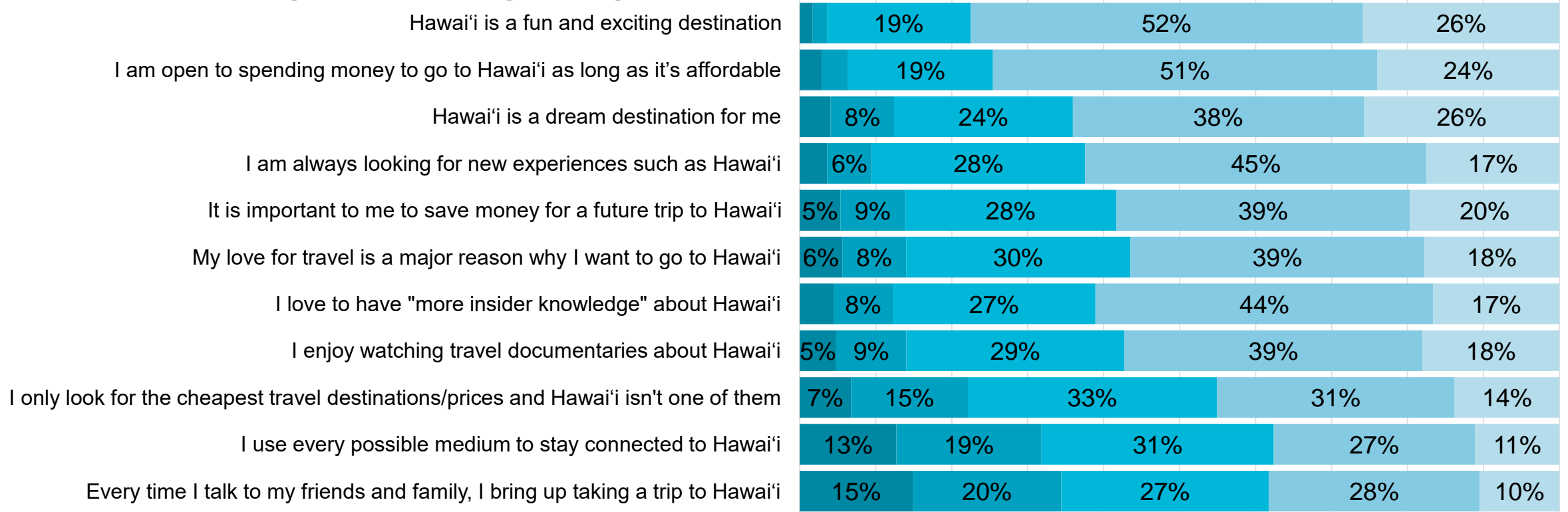
Agreement Regarding Hawai'i as an Aspirational Destination



Sample Size: n=131

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

Agreement Regarding Hawai'i as an Aspirational Destination

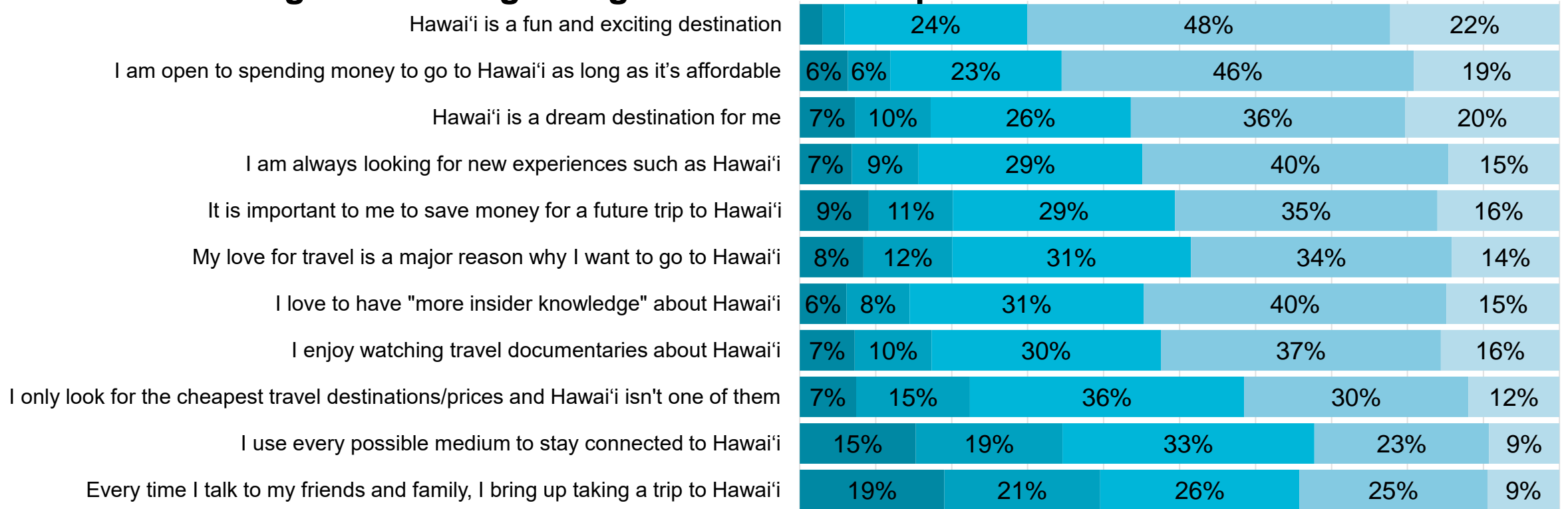


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=901

Canada Nat Rep: Hawai'i as an Aspirational Destination

Agreement Regarding Hawai'i as an Aspirational Destination

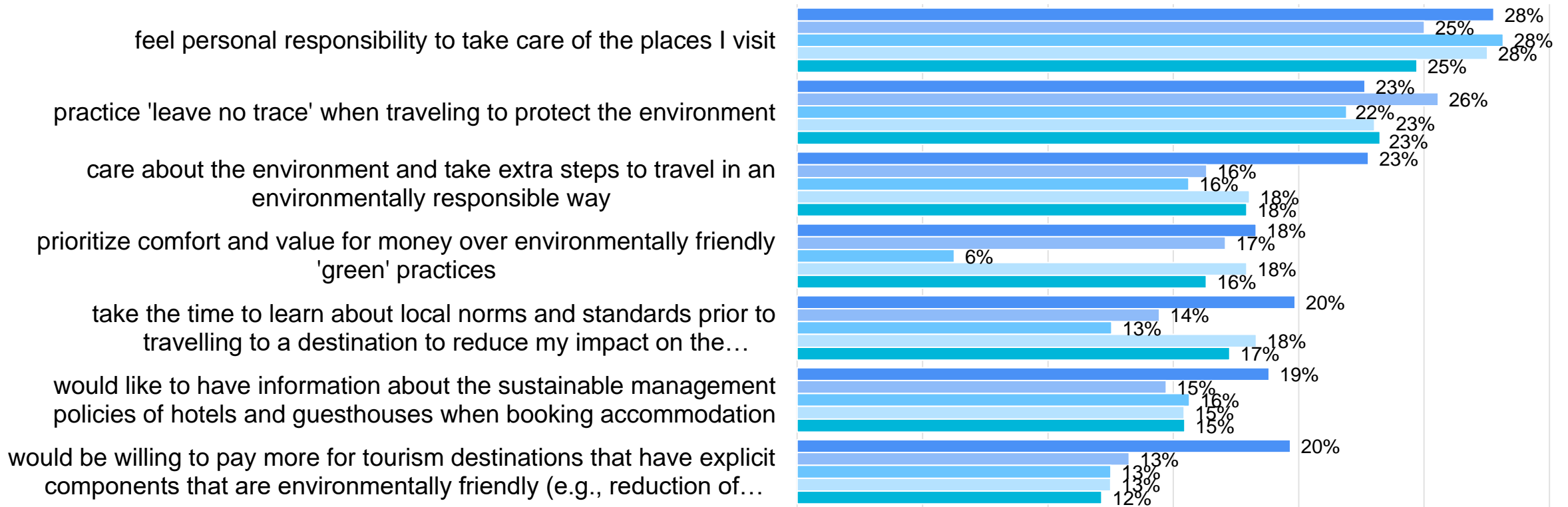


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=2,200

Canada - Sustainability and Travel Responsibility Statements

Agreement Regarding Sustainable Practices While Traveling (Strongly Agree)



■ **Canada Avid Traveler \$100k+**

n=152

■ **Canada Long Distance Traveler**

n=901

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

n=131

■ **Canada Nat Rep**

n=2,200

■ **Canada Senior Traveler \$100k+**

n=32

Canada - Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling (Strongly Agree)



■ **Canada Avid Traveler \$100k+**

n=152

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

n=131

■ **Canada Senior Traveler \$100k+**

n=32

■ **Canada Long Distance Traveler**

n=901

■ **Canada Nat Rep**

n=2,200

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=152

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

Agreement Regarding Sustaining Local Culture While Traveling

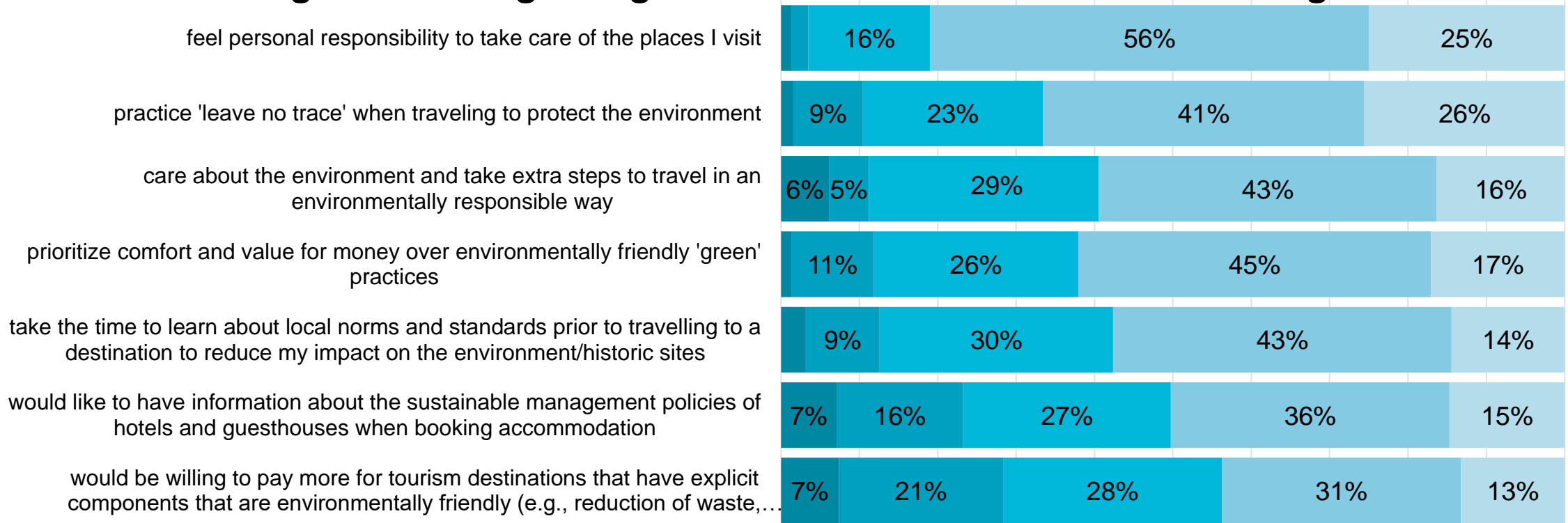


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=152

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

Agreement Regarding Sustainable Practices While Traveling

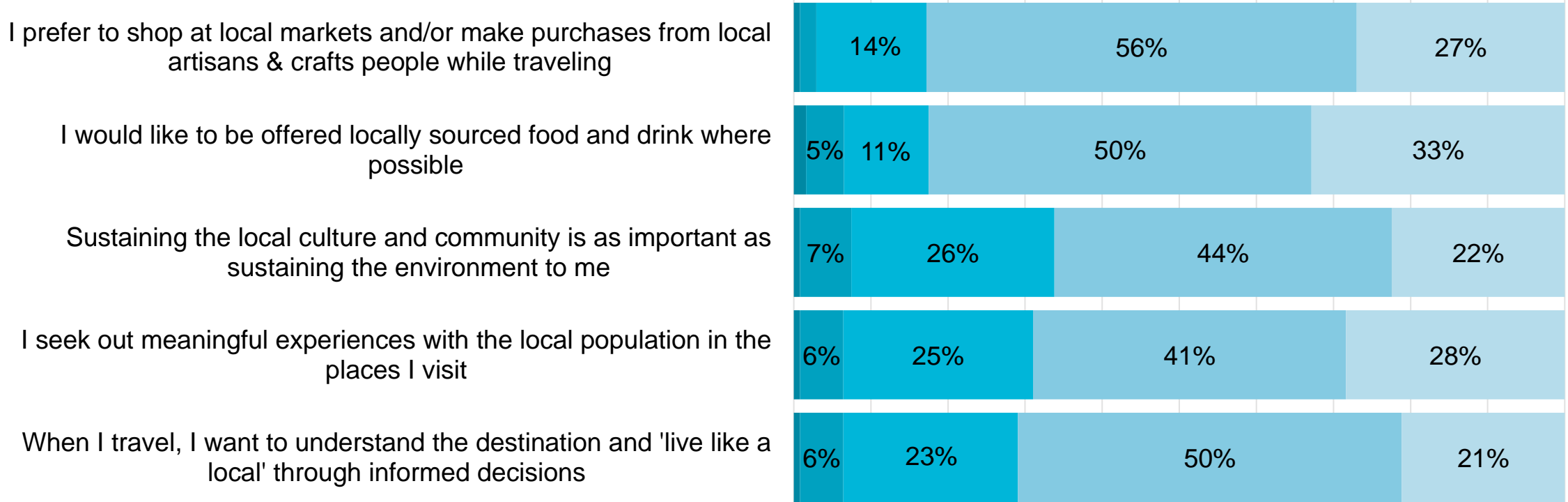


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=131

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

Agreement Regarding Sustaining Local Culture While Traveling

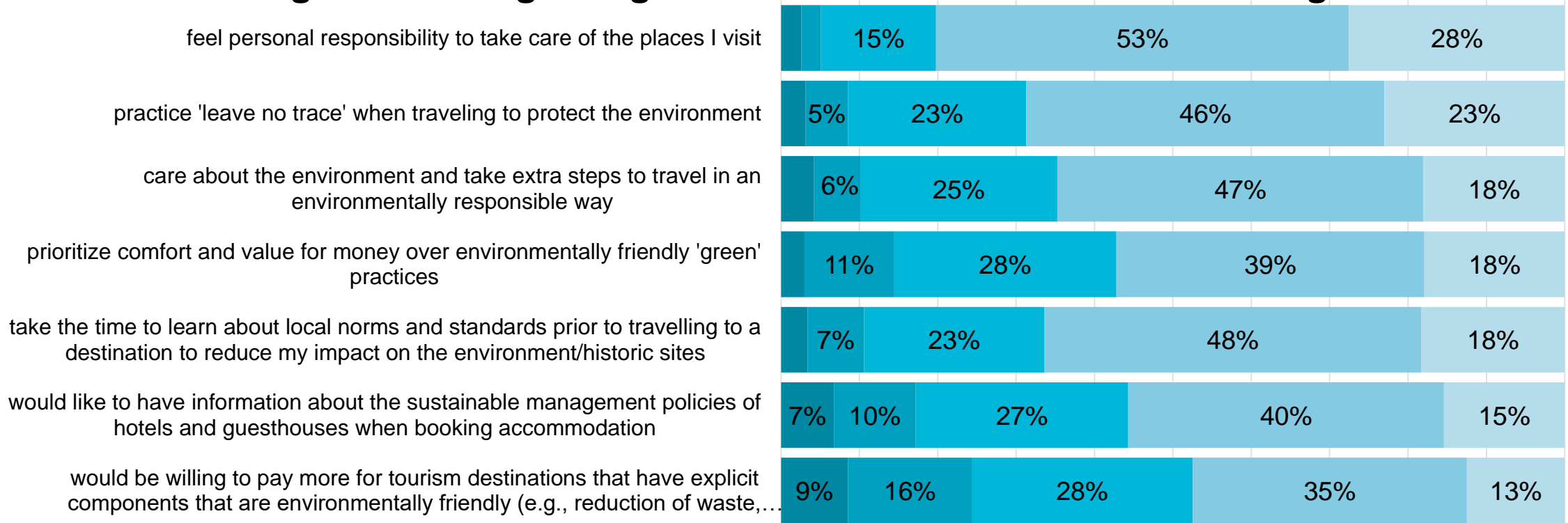


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=131

Canada Long Distance Travelers: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustainable Practices While Traveling

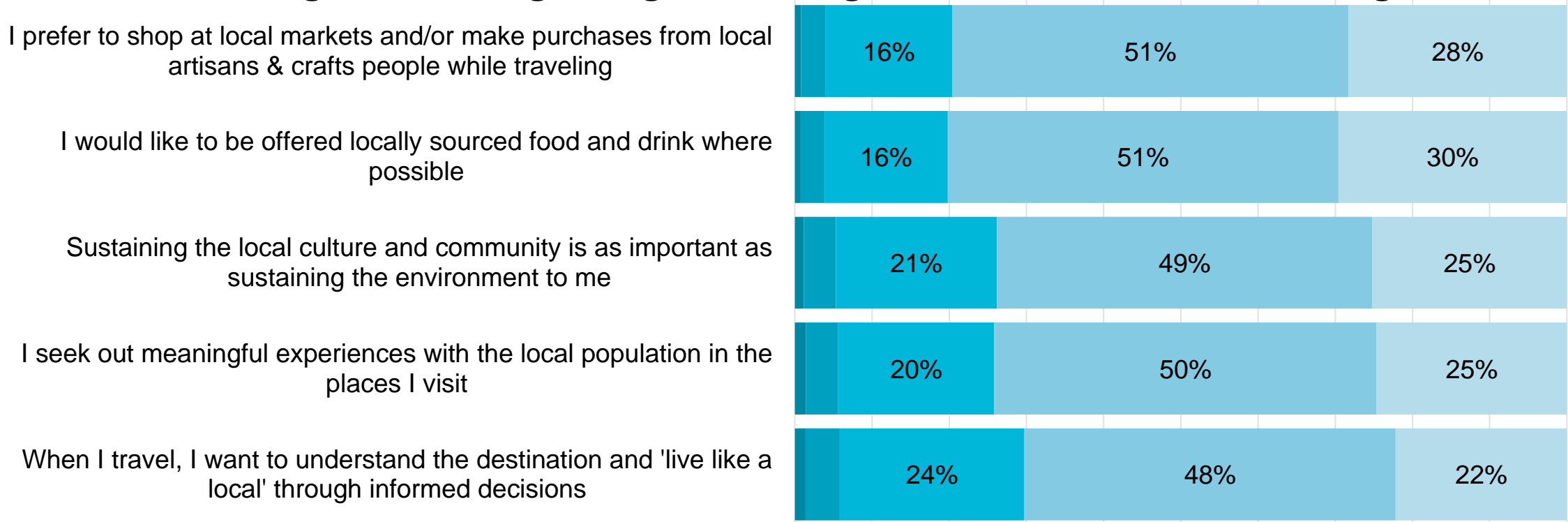


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=901

Canada Long Distance Travelers: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling

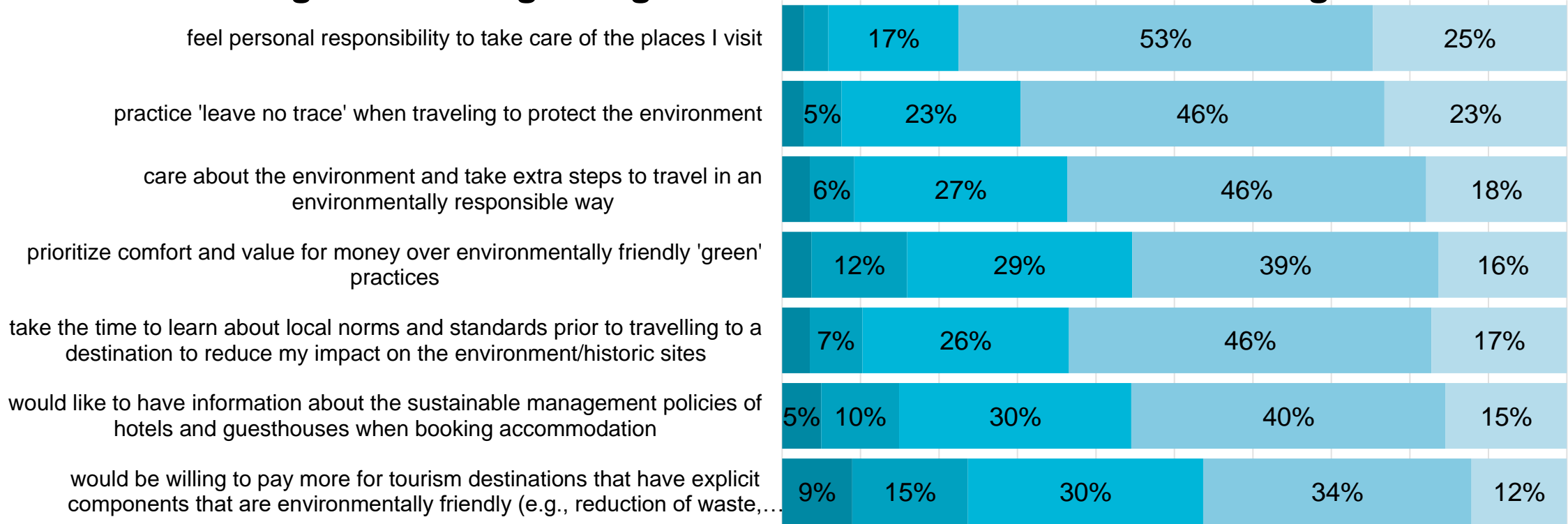


■ Strongly disagree
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 ■ Neither agree nor disagree
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Sample Size: n=901

Canada Nat Rep: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustainable Practices While Traveling

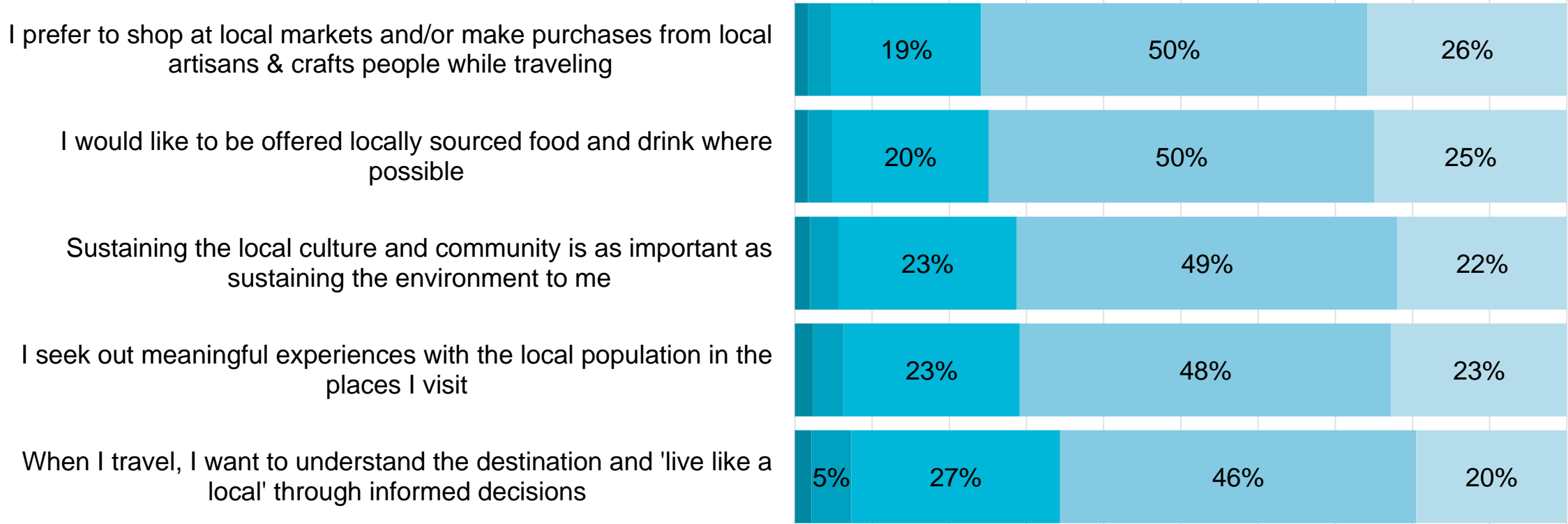


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
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Sample Size: n=2,200

Canada Nat Rep: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling

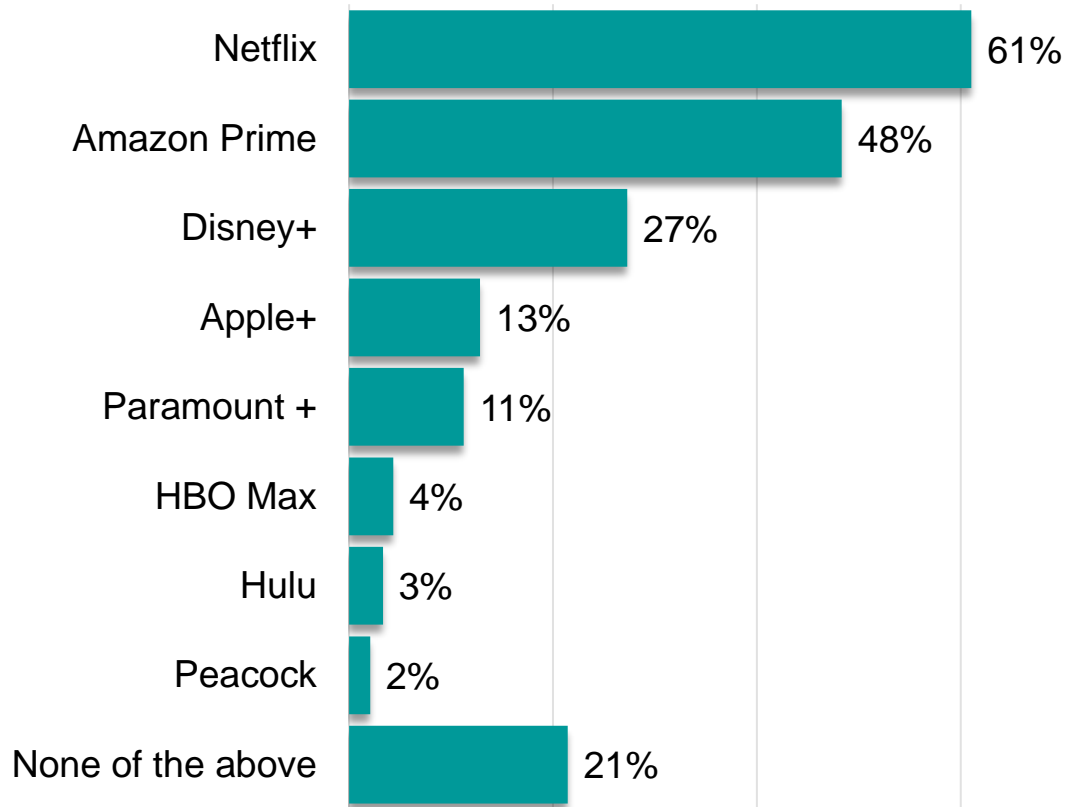


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

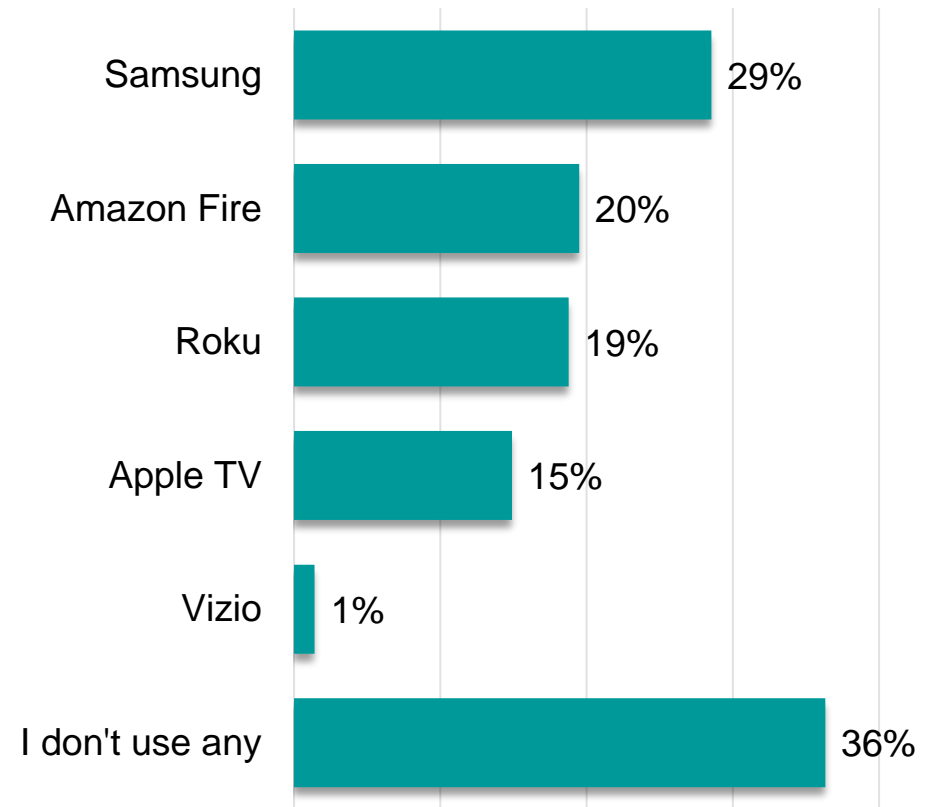
Sample Size: n=2,200

Canada Media Consumption

Streaming Platforms Used Weekly



Connected Device Used

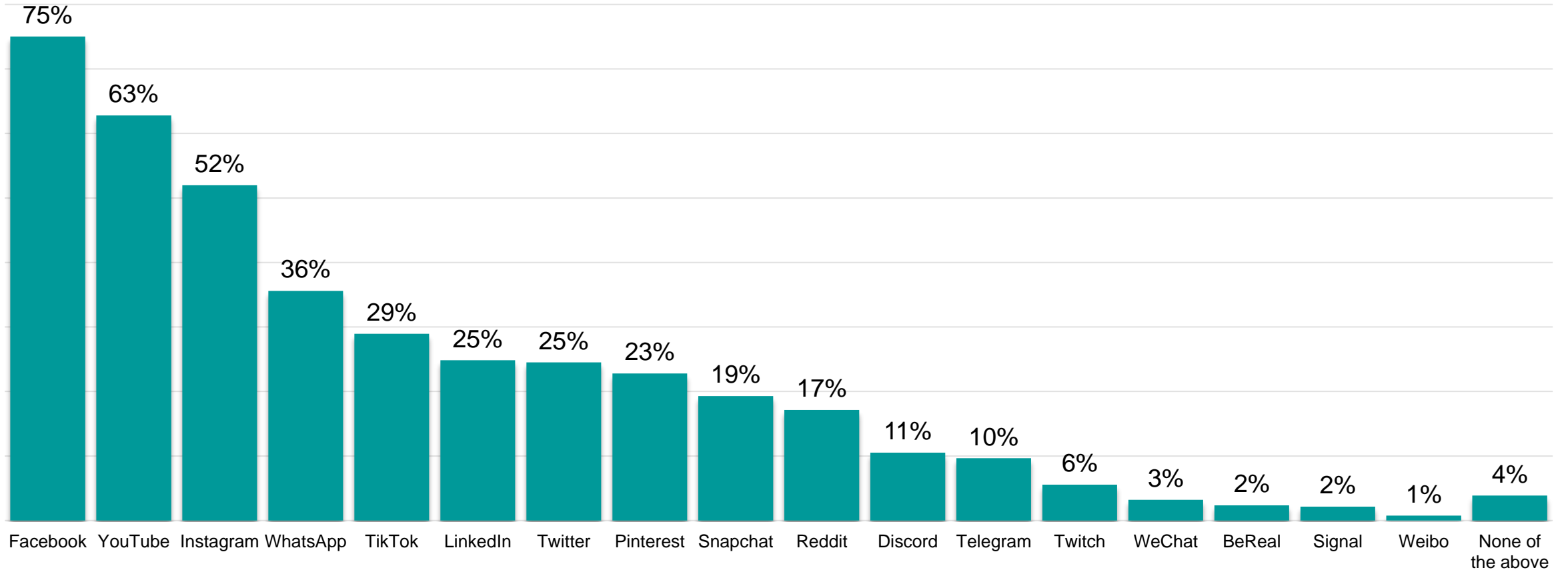


Sample Size: n=2,200

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=2,200

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	39%
Radio	9%
TV commercials	27%
Newspaper	11%
Friends/Family	49%
Social Media	40%
YouTube	37%
Out of Home Advertising (e.g., poster billboards, bus shelter advertisements, etc.)	8%
Email	16%
I don't recall	10%

Actions Taken After Seeing an Ad for a Destination

I go to the destination's website	34%
I search for information about the destination online	48%
I look up the destination on social media	26%
I talk to friends/family about the destination	37%
I book travel to the destination almost immediately	9%
I don't do anything	18%
None of the above	6%

Sample Size: n=2,200

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**