



Vision Insights Canada Traveler Profiles Q3 2024

October 25, 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

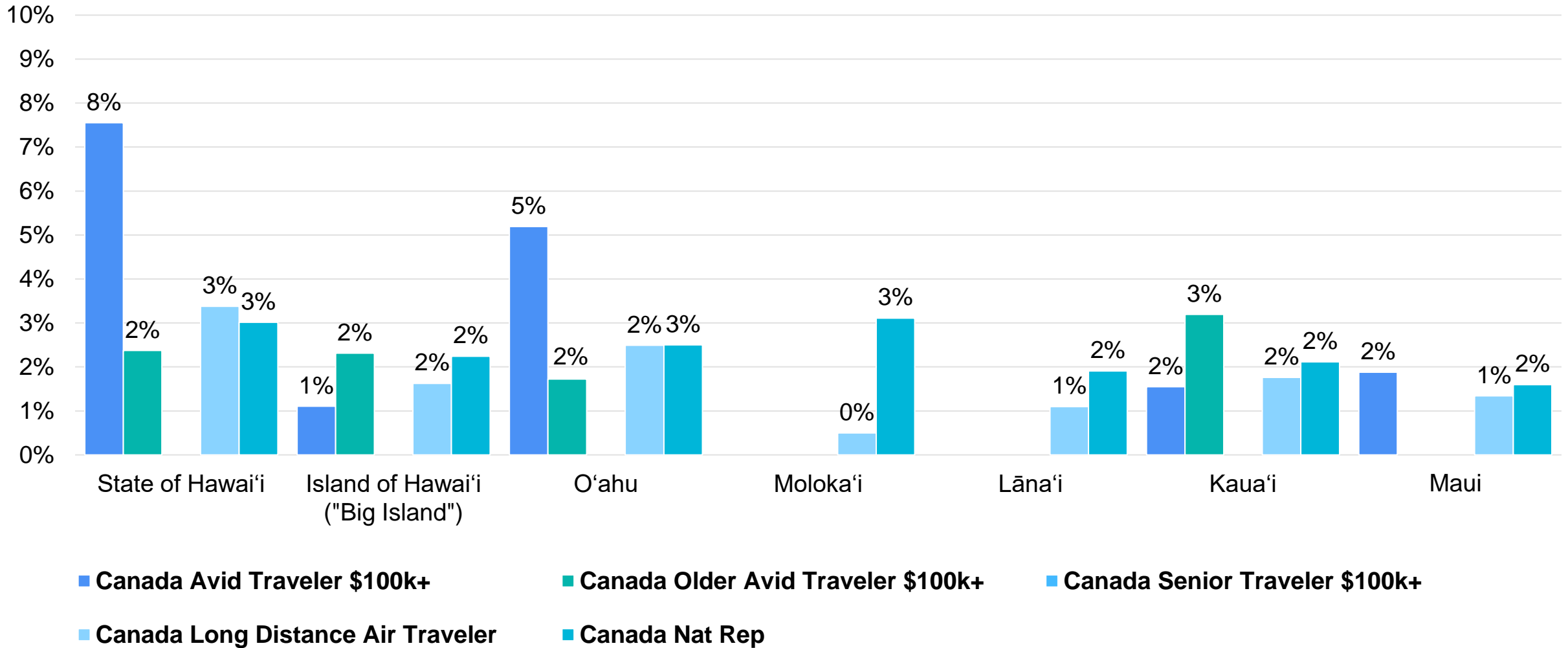
Older Avid Traveler \$100k+

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

Senior Traveler \$100k+

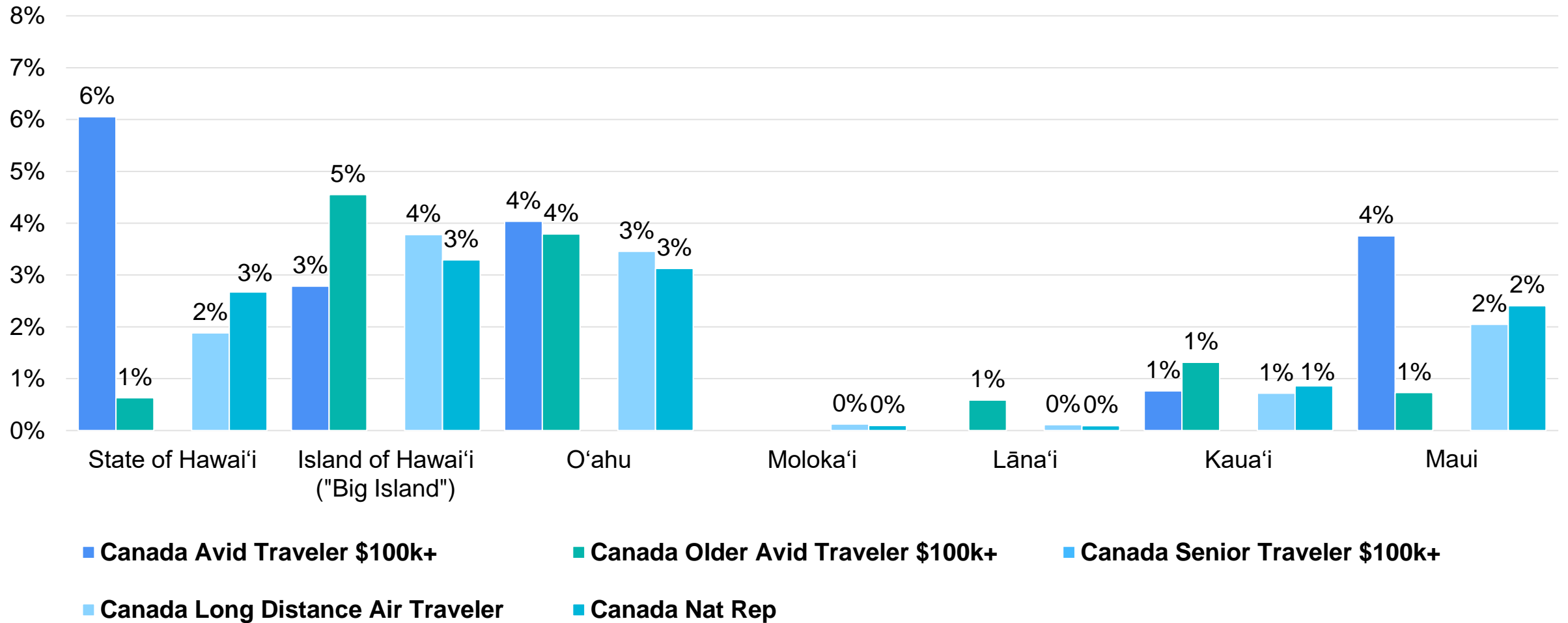
- Gross household income is \$100k+
- Age is 64+
- Been to Hawai'i (ever)

Canada - Leisure Trip in Past 12 Months



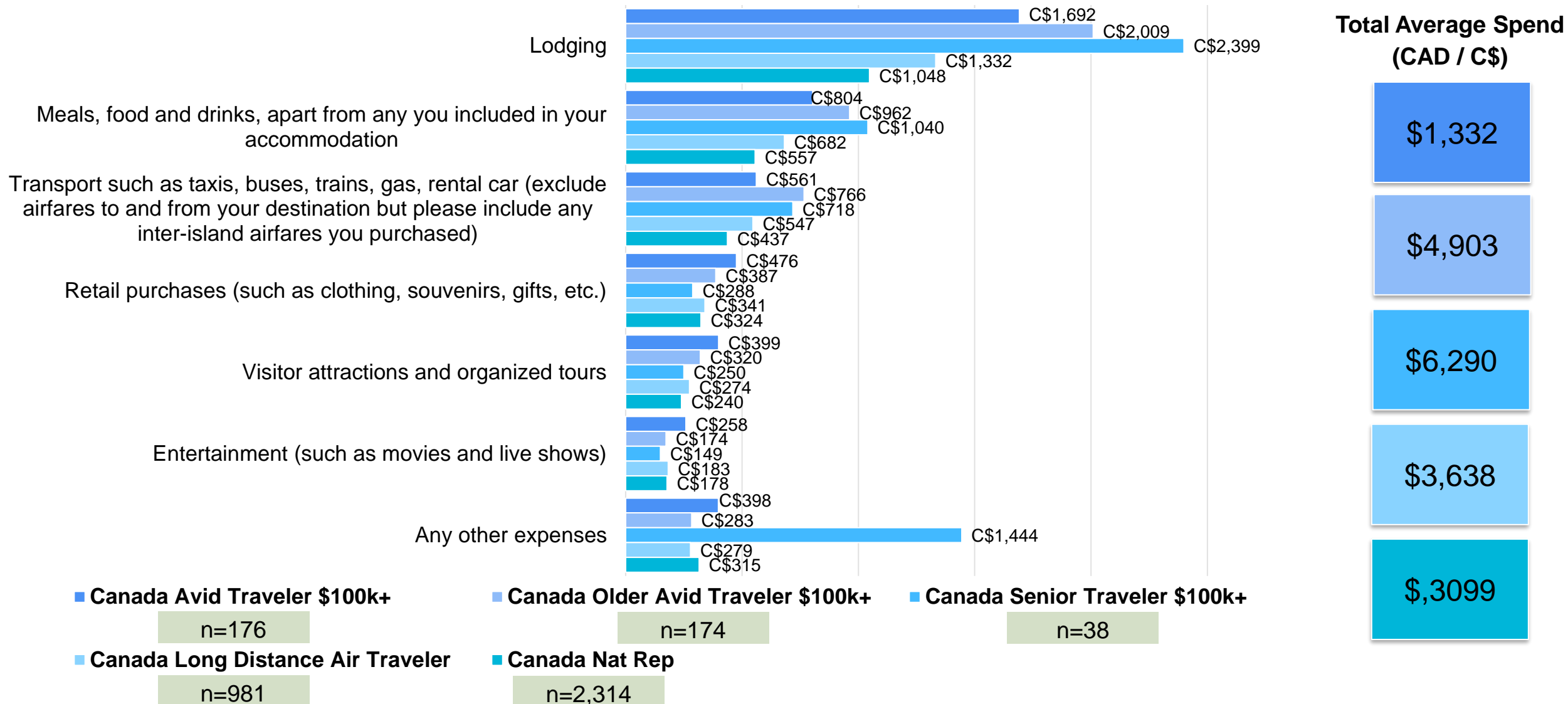
Sample Min. n=50

Canada - Next Destination for Leisure Trip



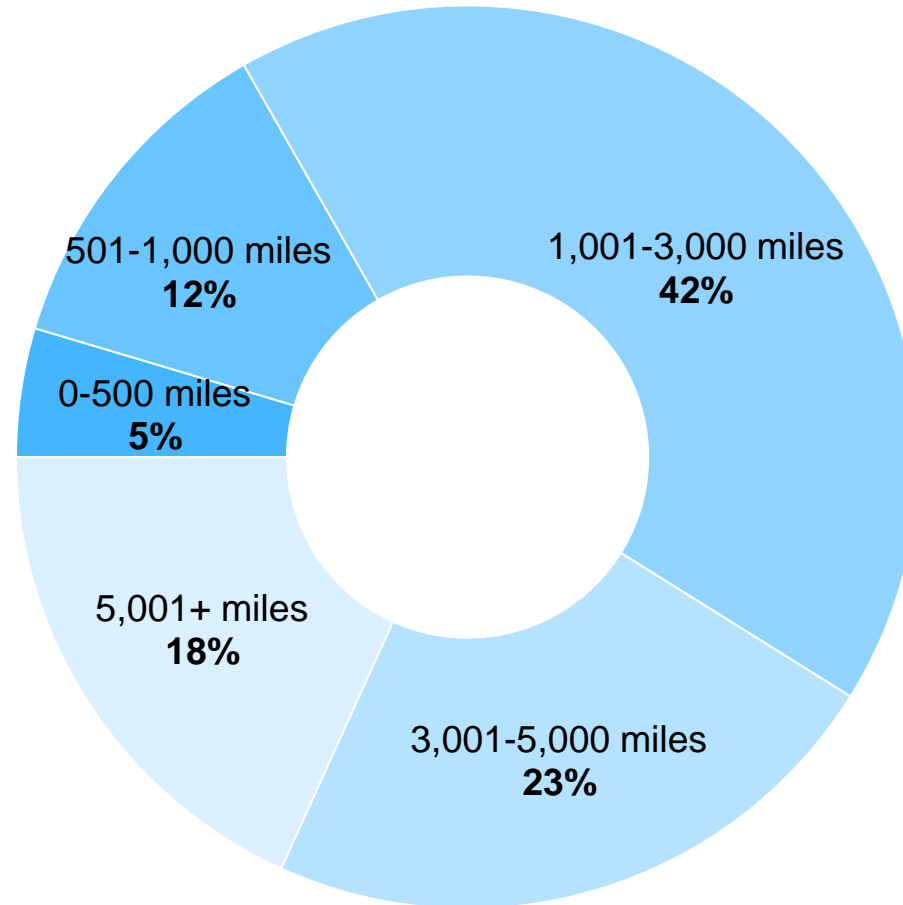
Sample Min. n=75

Canada - Total Annual Holiday Spend



Canada Avid Travelers \$100k+: Annual Vacation

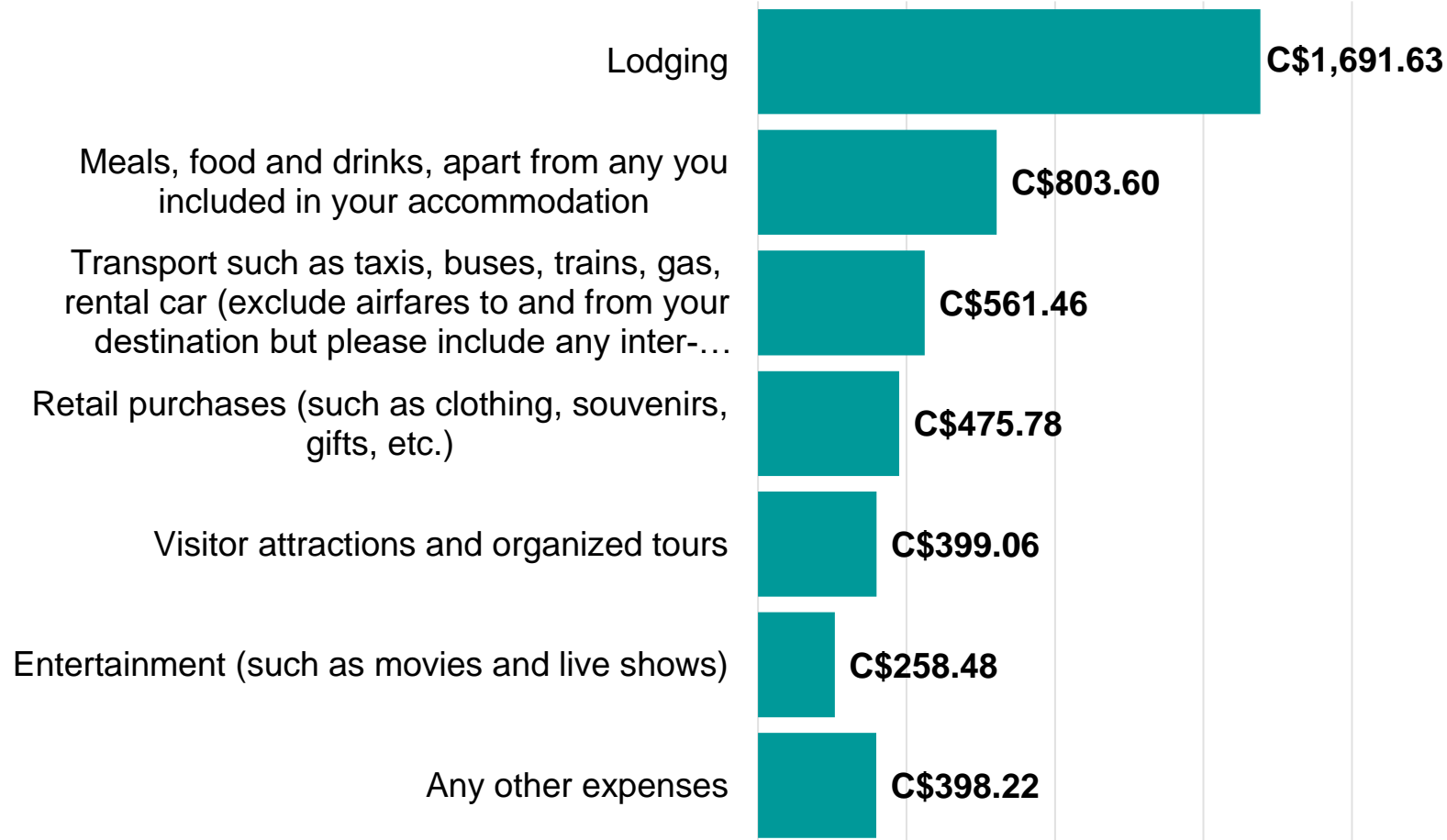
Distance Travelled on Annual Vacation



Sample Size: n=176

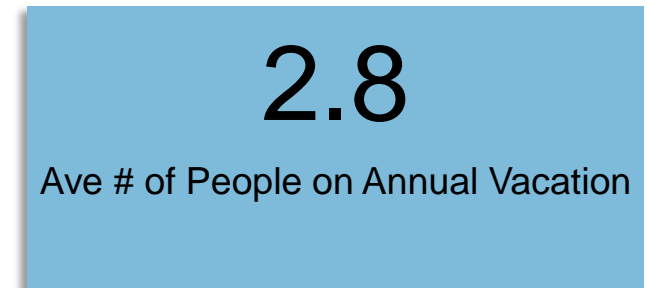
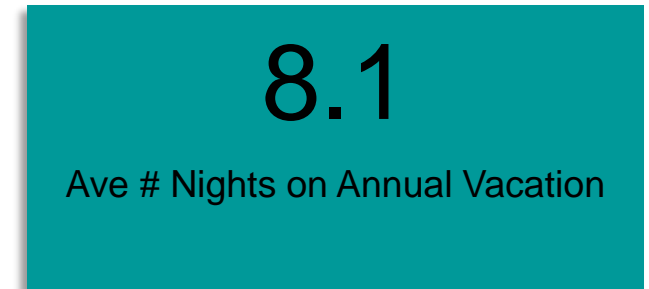
Canada Avid Travelers \$100k+: Annual Vacation

Average Spend



Sample Size: n=176

Spend Per Person Per Day

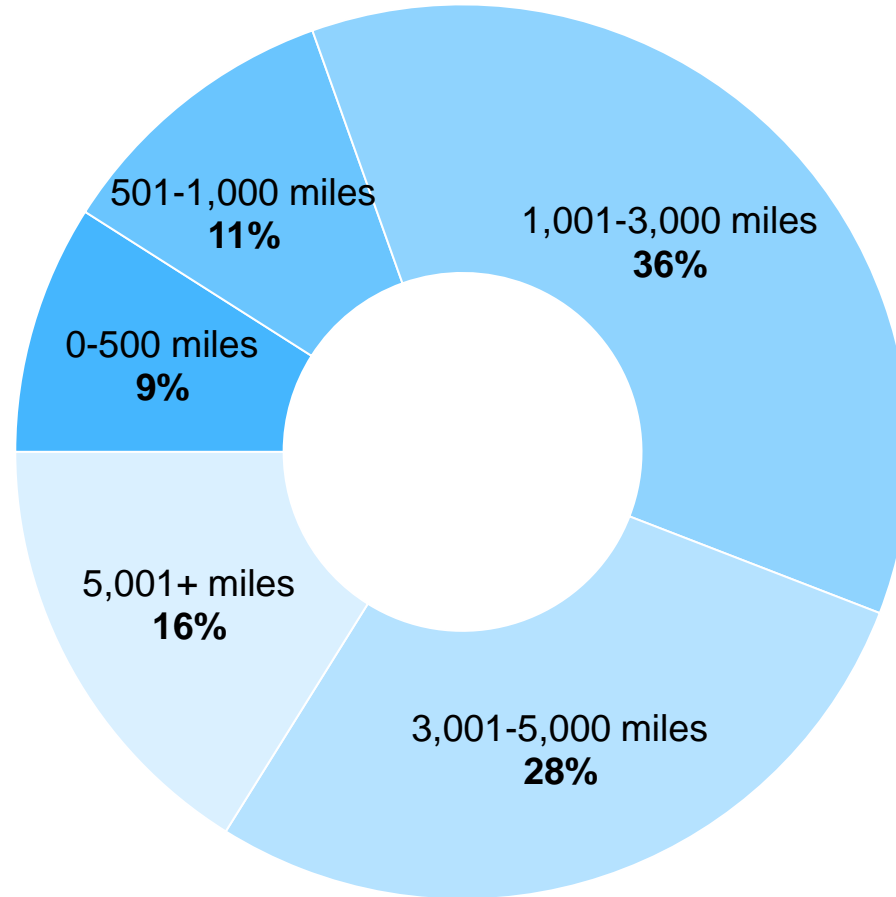


C\$199.46

Ave. Per Person Per Day Spend

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

Distance Travelled on Annual Vacation



Sample Size: n=174

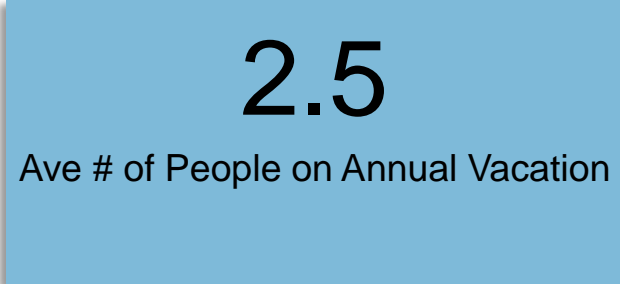
Canada Older Avid Travelers \$100k+: Annual Vacation

Average Spend



Sample Size: n=174

Spend Per Person Per Day



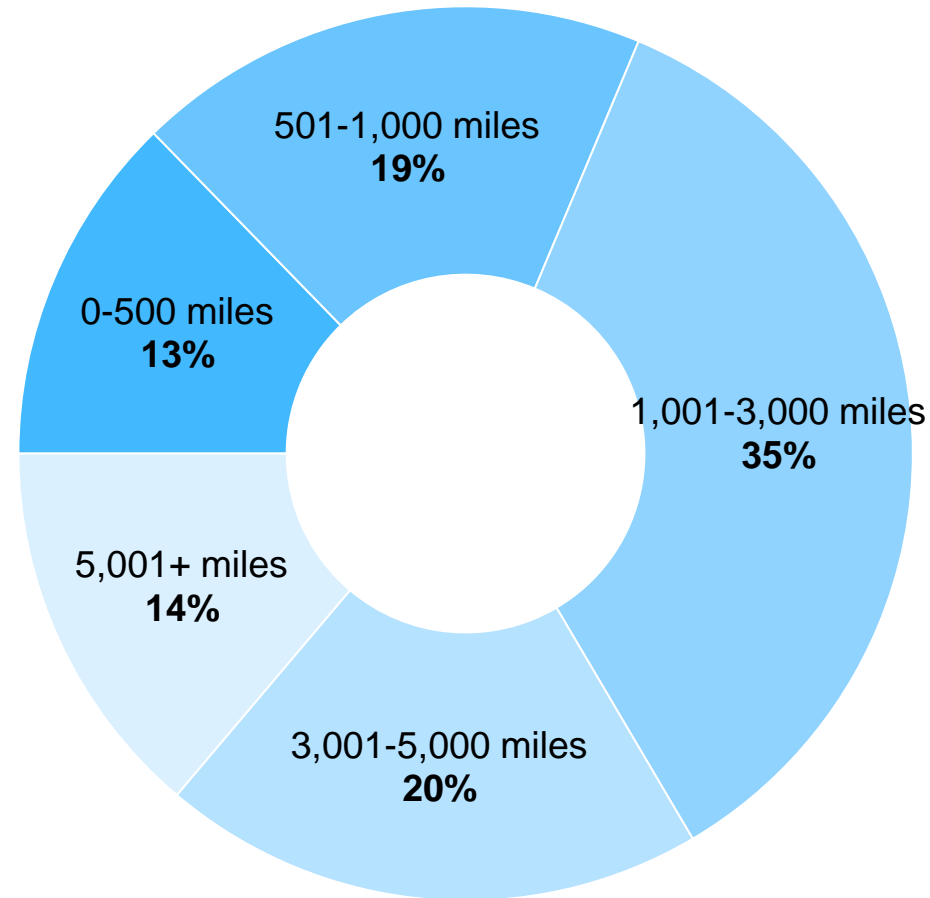
C\$191.17

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=981

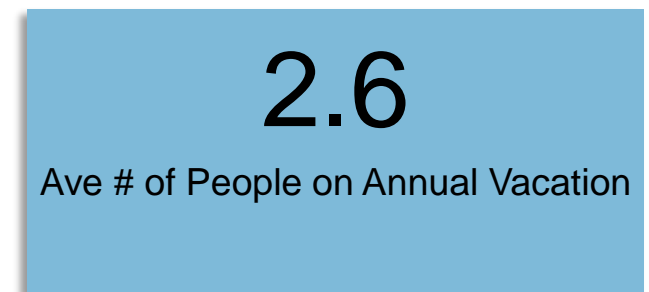
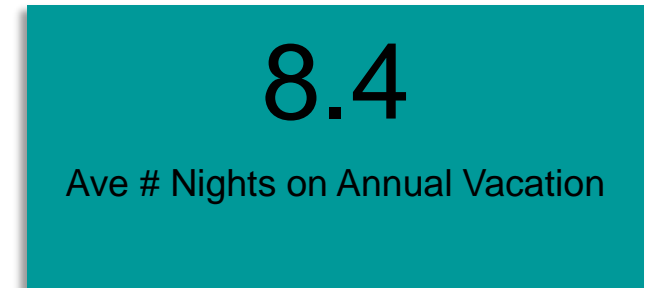
Canada Long-Distance Travelers: Annual Vacation

Average Spend



Sample Size: n=981

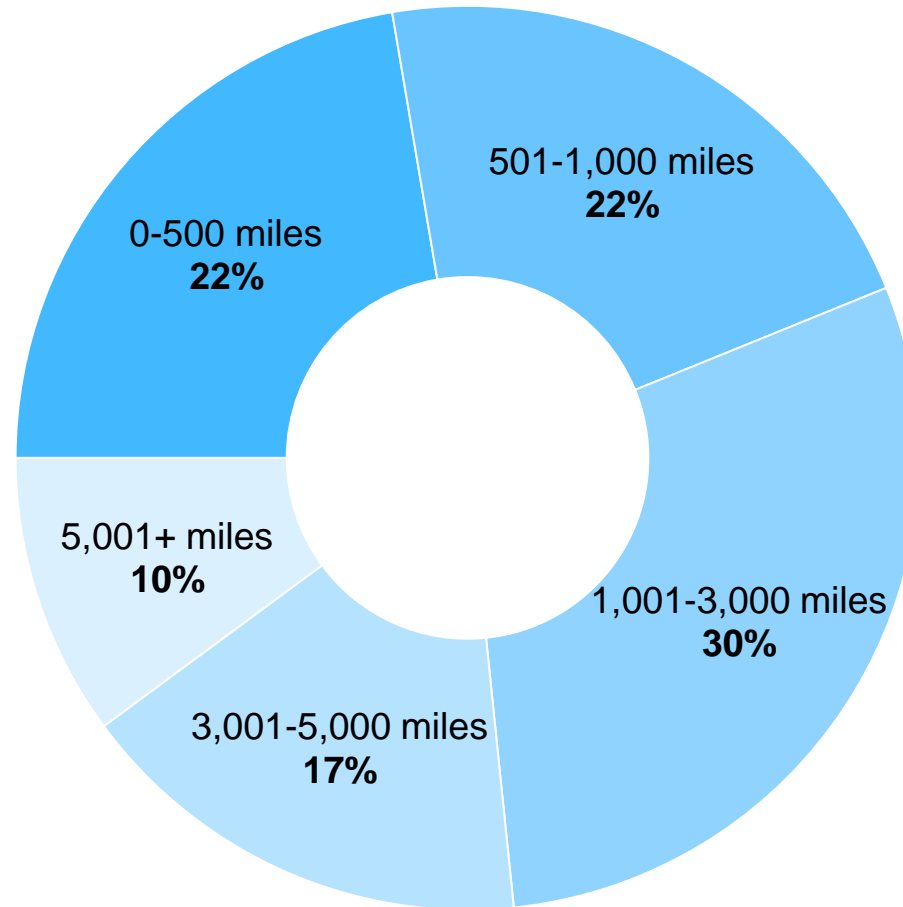
Spend Per Person Per Day



C\$170.09
Ave. Per Person Per Day Spend

Canada Nat Rep: Annual Vacation

Distance Travelled on Annual Vacation



Sample Size: n=2,314

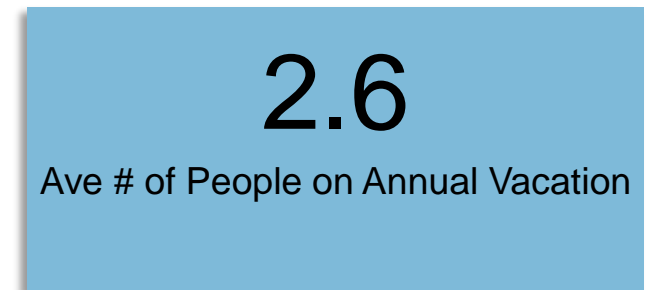
Canada Nat Rep: Annual Vacation

Average Spend



Sample Size: n=2,314

Spend Per Person Per Day



C\$158.58
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 | 52% | 62% | 40% | 59% | 57% |
| Comfort and accessibility | 42% | 51% | 44% | 49% | 47% |
| Natural attractions/activities | 45% | 42% | 47% | 43% | 39% |
| Family friendly locations and activities | 36% | 29% | 24% | 30% | 29% |
| Opportunity to experience local restaurants/businesses | 41% | 38% | 29% | 38% | 33% |
| Cultural attractions | 38% | 40% | 35% | 38% | 32% |
| Entertainment and nightlife | 25% | 16% | 5% | 20% | 20% |
| Consideration of sustainable principles | 27% | 19% | 16% | 22% | 21% |
| Safe and Secure Destination | 59% | 79% | 74% | 66% | 63% |

Sample Size:

n=176

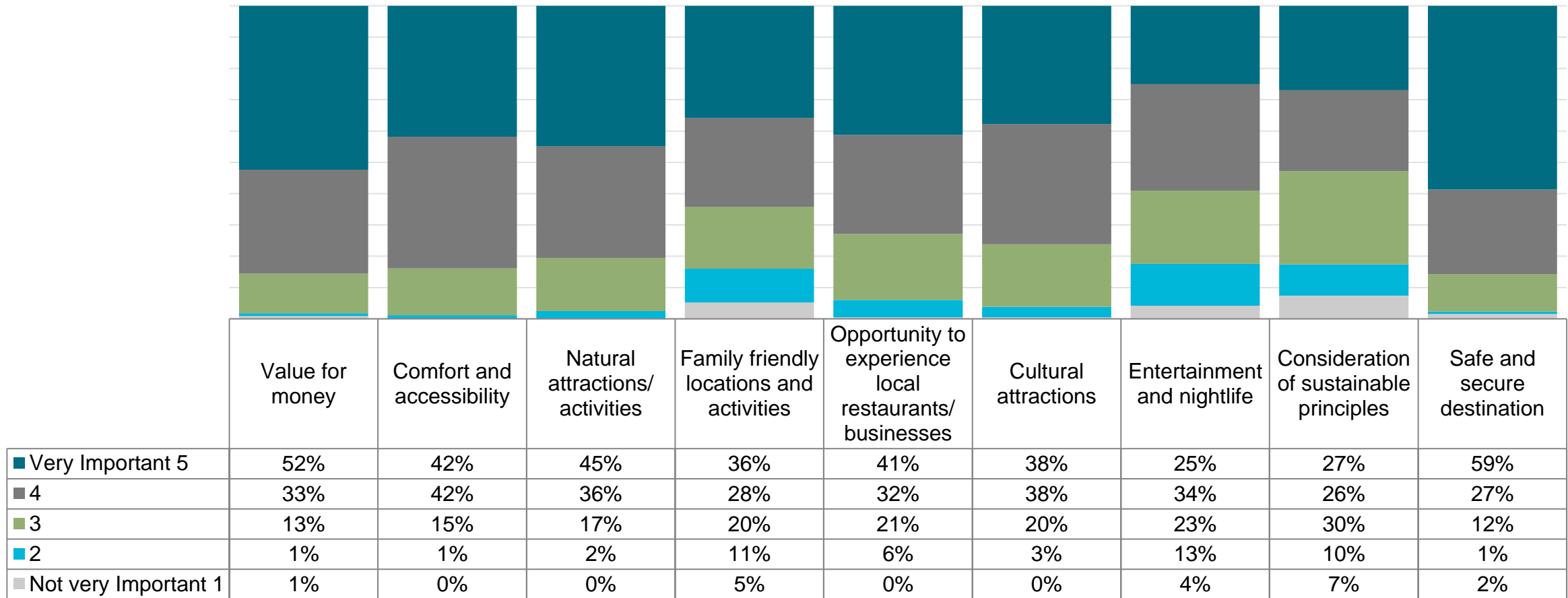
n=174

n=38

n=981

n=2,314

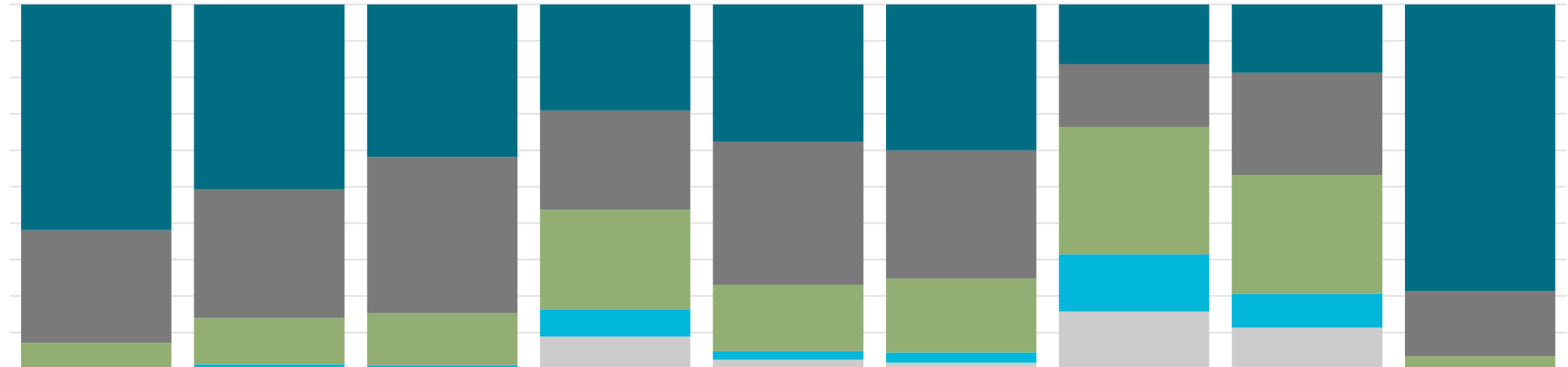
Canada Avid Travelers \$100k+: Importance of Travel Factors



Not very Important 1
 2
 3
 4
 Very Important 5

Sample Size: n=176

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

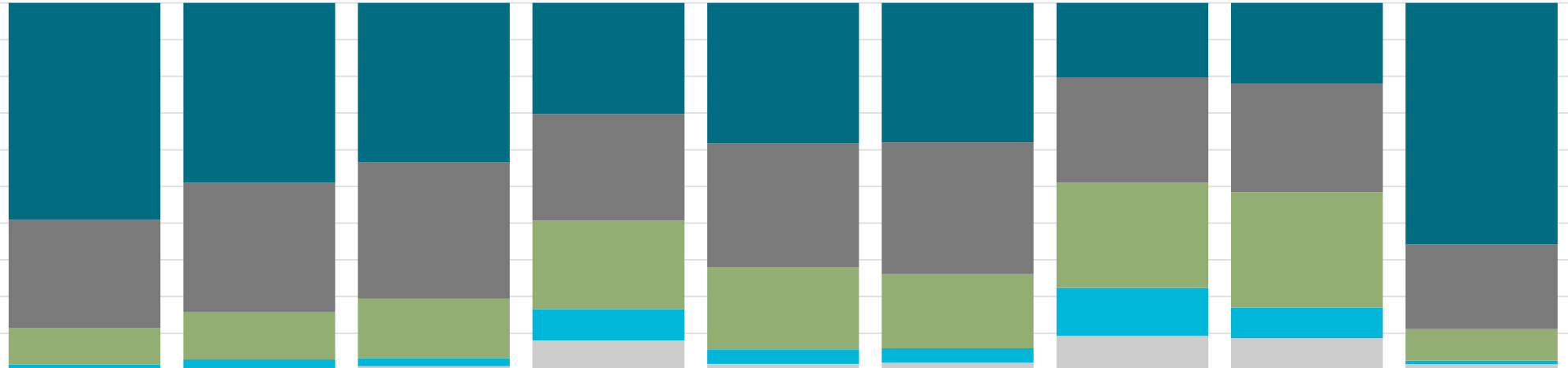


| | Value for money | Comfort and accessibility | Natural attractions/activities | Family friendly locations and activities | Opportunity to experience local restaurants/businesses | Cultural attractions | Entertainment and nightlife | Consideration of sustainable principles | Safe and secure destination |
|----------------------|-----------------|---------------------------|--------------------------------|--|--|----------------------|-----------------------------|---|-----------------------------|
| Very Important 5 | 62% | 51% | 42% | 29% | 38% | 40% | 16% | 19% | 79% |
| 4 | 31% | 35% | 43% | 27% | 39% | 35% | 17% | 28% | 18% |
| 3 | 7% | 13% | 14% | 27% | 18% | 20% | 35% | 33% | 3% |
| 2 | 0% | 1% | 1% | 7% | 2% | 3% | 16% | 9% | 0% |
| Not very Important 1 | 0% | 0% | 1% | 9% | 3% | 2% | 16% | 11% | 1% |

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

Sample Size: n=174

Canada Long Distance Travelers: Importance of Travel Factors

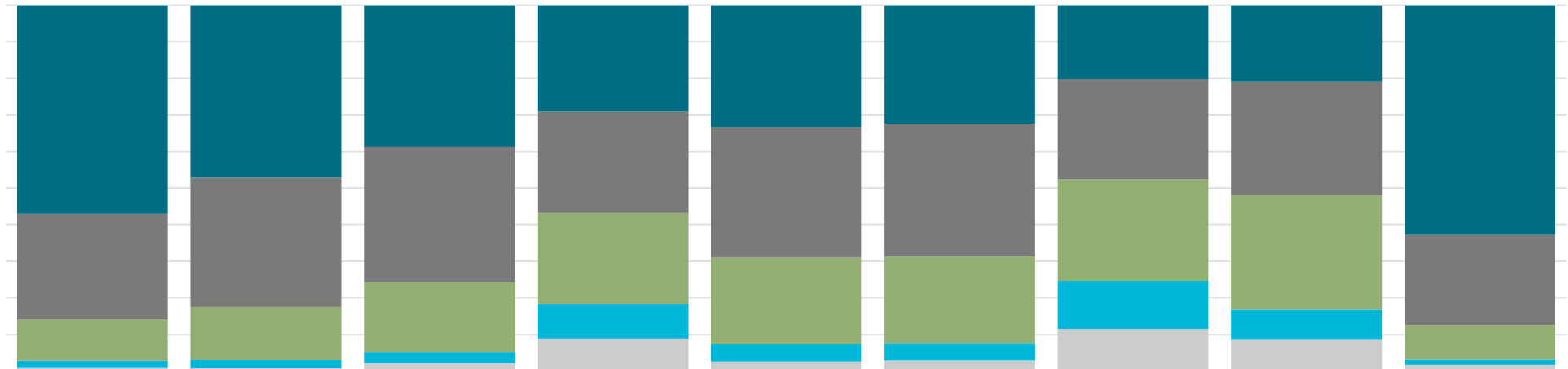


| | Value for money | Comfort and accessibility | Natural attractions/activities | Family friendly locations and activities | Opportunity to experience local restaurants/businesses | Cultural attractions | Entertainment and nightlife | Consideration of sustainable principles | Safe and secure destination |
|----------------------|-----------------|---------------------------|--------------------------------|--|--|----------------------|-----------------------------|---|-----------------------------|
| Very Important 5 | 59% | 49% | 43% | 30% | 38% | 38% | 20% | 22% | 66% |
| 4 | 29% | 35% | 37% | 29% | 34% | 36% | 29% | 30% | 23% |
| 3 | 10% | 13% | 16% | 24% | 22% | 20% | 29% | 32% | 9% |
| 2 | 1% | 2% | 2% | 9% | 4% | 4% | 13% | 8% | 1% |
| Not very Important 1 | 0% | 1% | 1% | 8% | 2% | 2% | 9% | 9% | 2% |

Not very Important 1
 2
 3
 4
 Very Important 5

Sample Size: n=981

Canada Nat Rep: Importance of Travel Factors



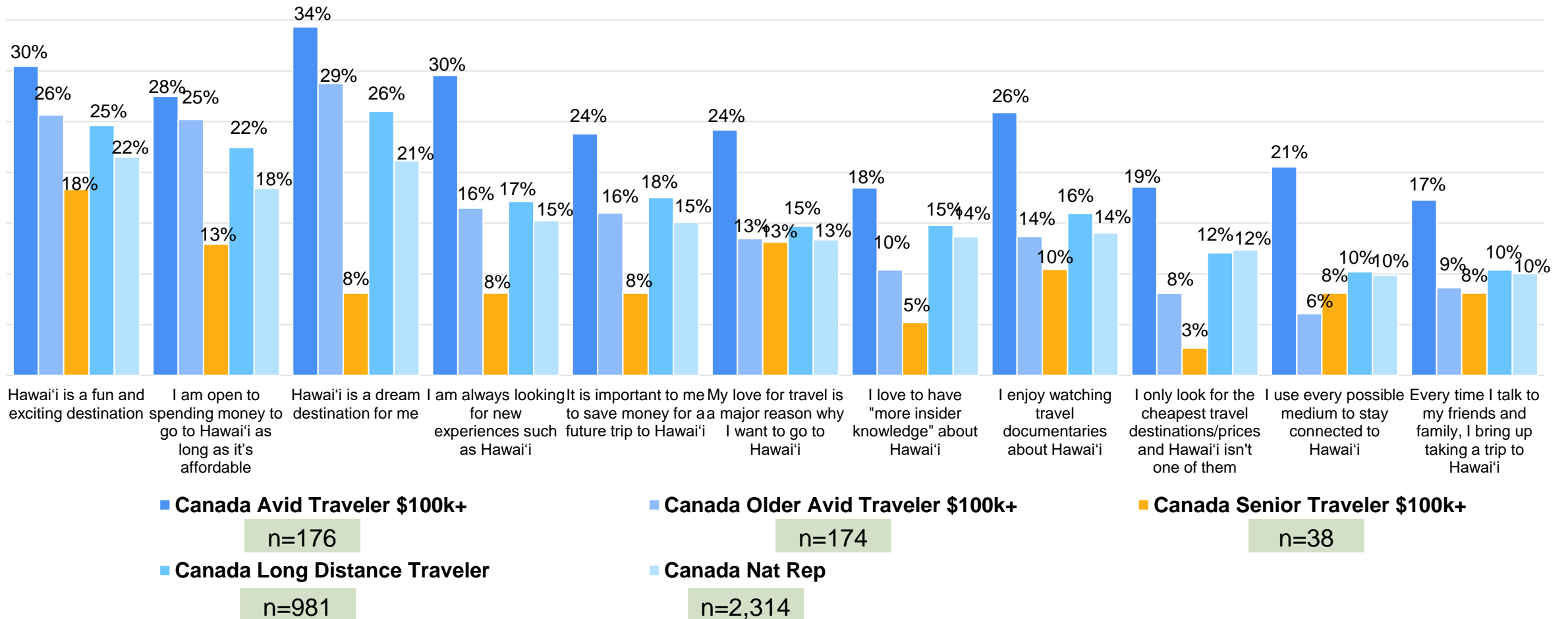
| | Value for money | Comfort and accessibility | Natural attractions/activities | Family friendly locations and activities | Opportunity to experience local restaurants/businesses | Cultural attractions | Entertainment and nightlife | Consideration of sustainable principles | Safe and secure destination |
|----------------------|-----------------|---------------------------|--------------------------------|--|--|----------------------|-----------------------------|---|-----------------------------|
| Very Important 5 | 57% | 47% | 39% | 29% | 33% | 32% | 20% | 21% | 63% |
| 4 | 29% | 35% | 37% | 28% | 36% | 36% | 27% | 31% | 25% |
| 3 | 11% | 14% | 19% | 25% | 24% | 24% | 28% | 31% | 9% |
| 2 | 2% | 2% | 3% | 9% | 5% | 5% | 13% | 8% | 2% |
| Not very Important 1 | 1% | 1% | 2% | 9% | 3% | 3% | 11% | 9% | 2% |

Not very Important 1
 2
 3
 4
 Very Important 5

Sample Size: n=2,314

Canada - Hawai'i as an Aspirational Destination

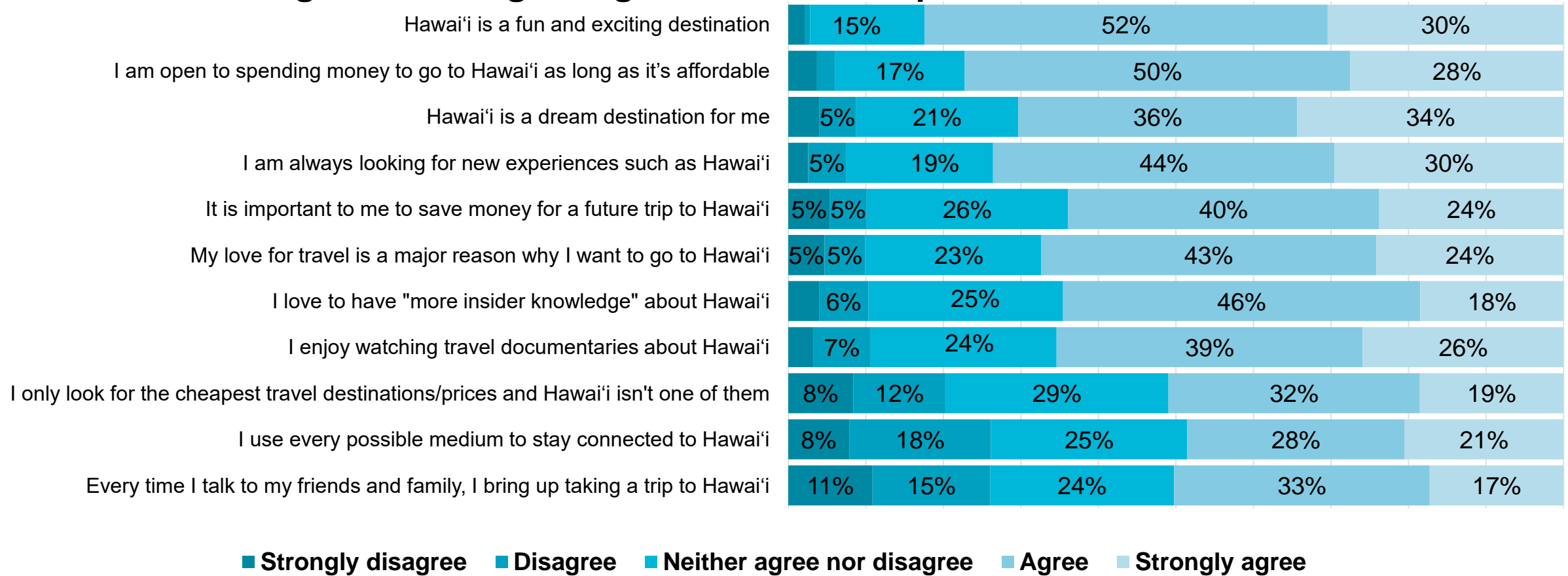
Agreement Regarding Hawai'i as a Travel Destination (Strongly Agree)



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

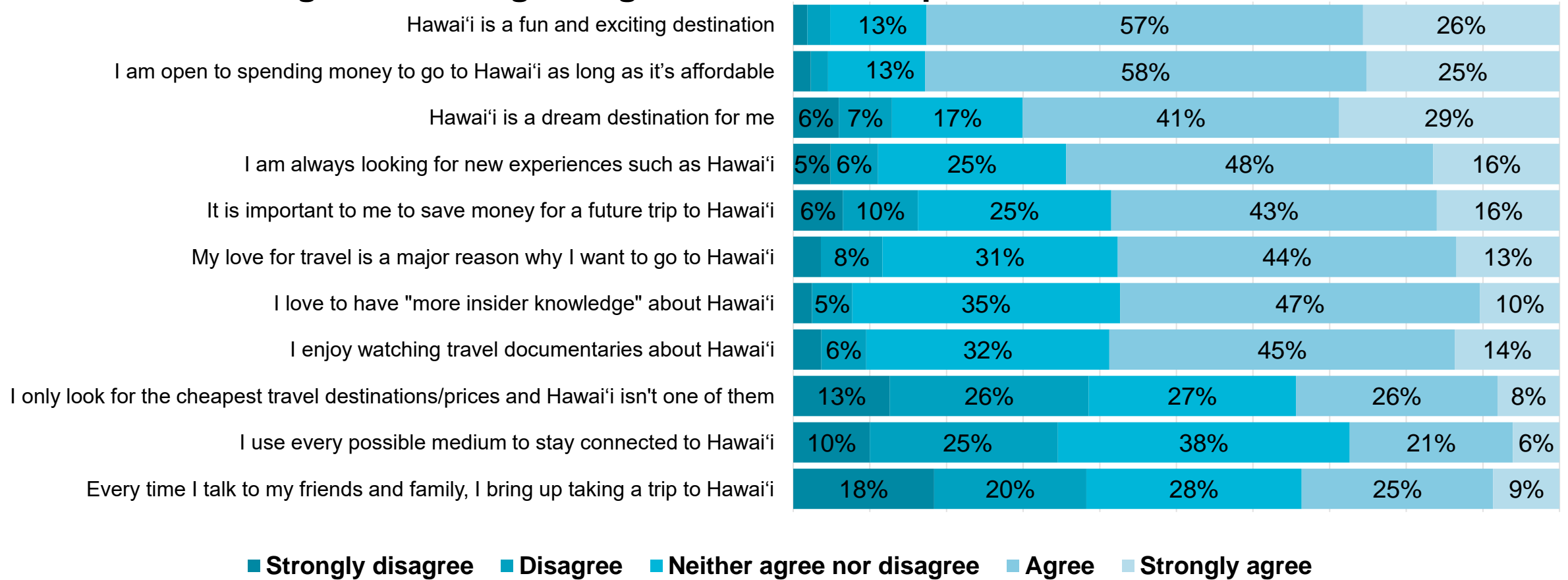
Agreement Regarding Hawai'i as an Aspirational Destination



Sample Size: n=176

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

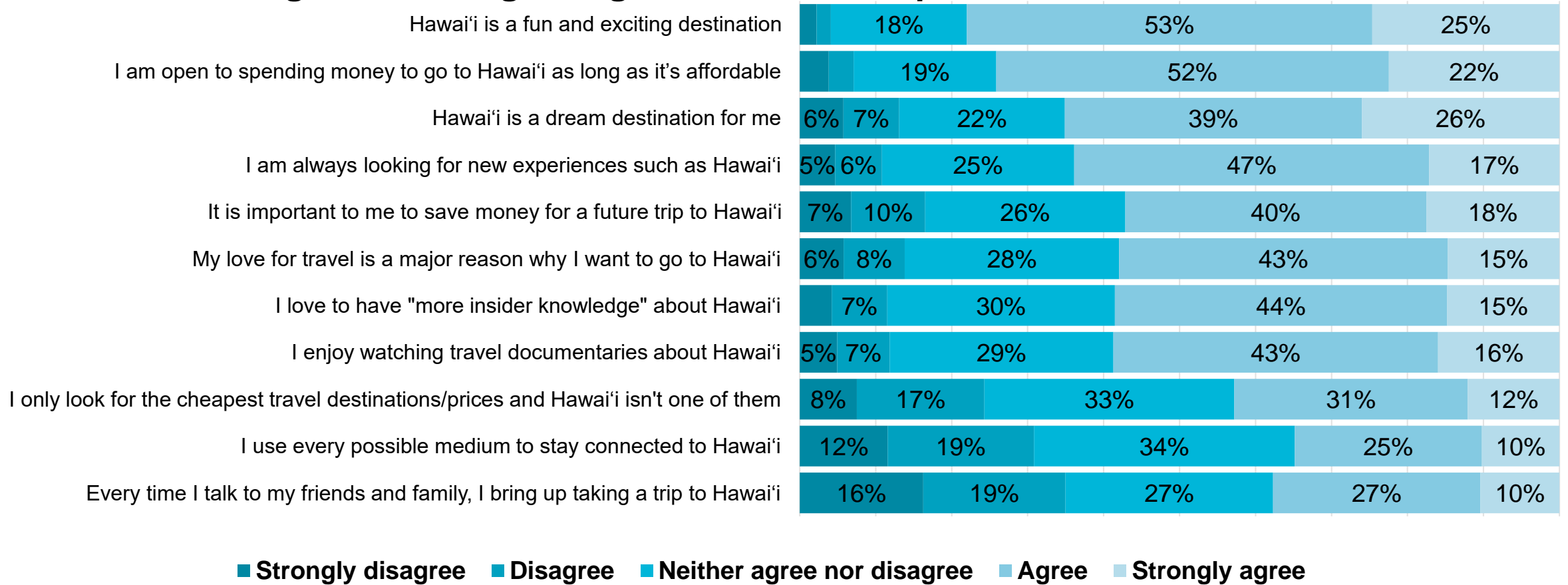
Agreement Regarding Hawai'i as an Aspirational Destination



Sample Size: n=174

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

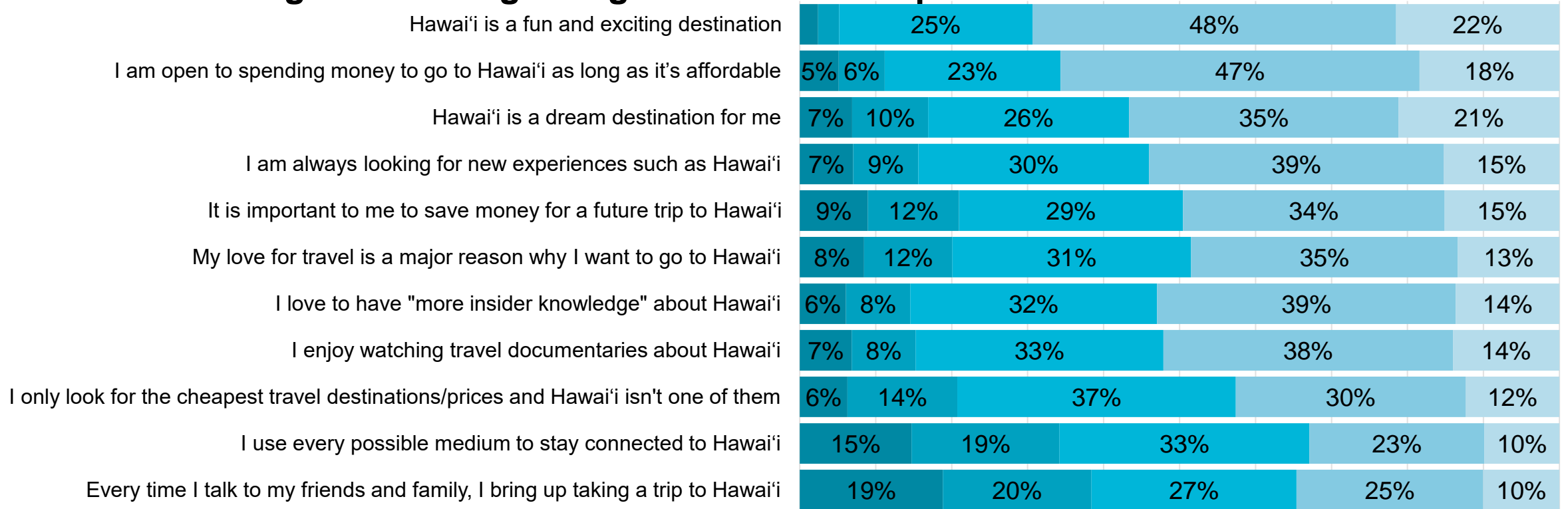
Agreement Regarding Hawai'i as an Aspirational Destination



Sample Size: n=981

Canada Nat Rep: Hawai'i as an Aspirational Destination

Agreement Regarding Hawai'i as an Aspirational Destination

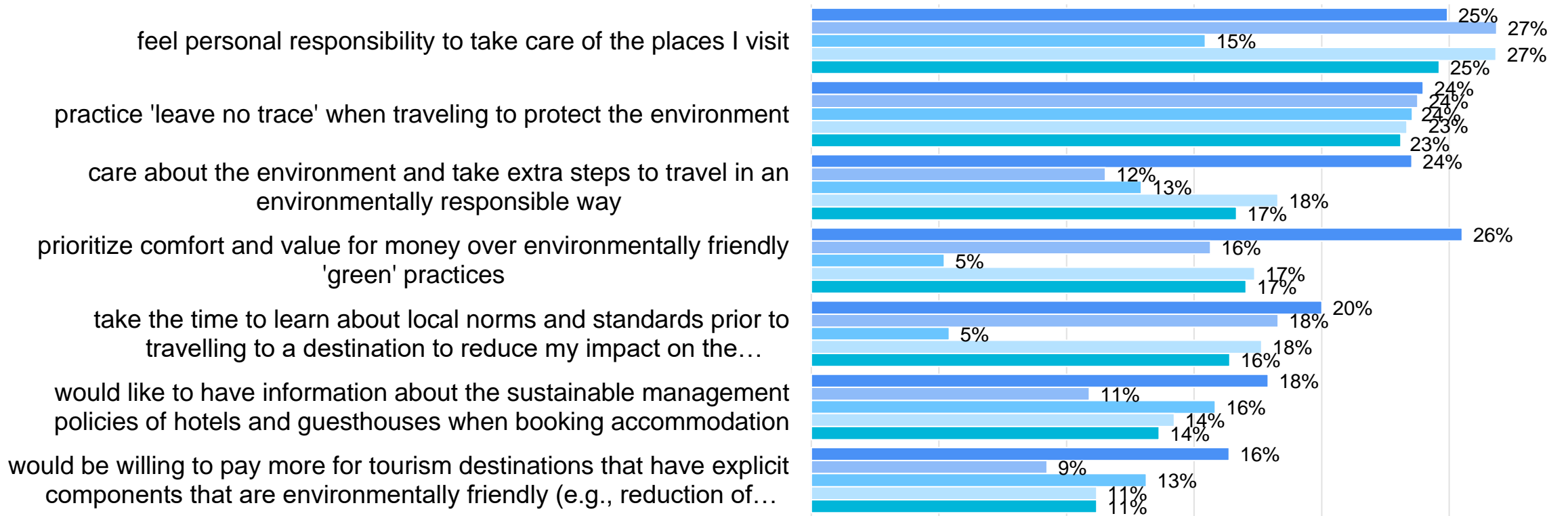


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=2,314

Canada - Sustainability and Travel Responsibility Statements

Agreement Regarding Sustainable Practices While Traveling (Strongly Agree)



■ **Canada Avid Traveler \$100k+**

n=176

■ **Canada Long Distance Traveler**

n=981

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

n=174

■ **Canada Nat Rep**

n=2,314

■ **Canada Senior Traveler \$100k+**

n=38

Canada - Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling (Strongly Agree)



■ **Canada Avid Traveler \$100k+**

n=176

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

n=174

■ **Canada Senior Traveler \$100k+**

n=38

■ **Canada Long Distance Traveler**

n=981

■ **Canada Nat Rep**

n=2,314

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

Agreement Regarding Sustainable Practices While Traveling

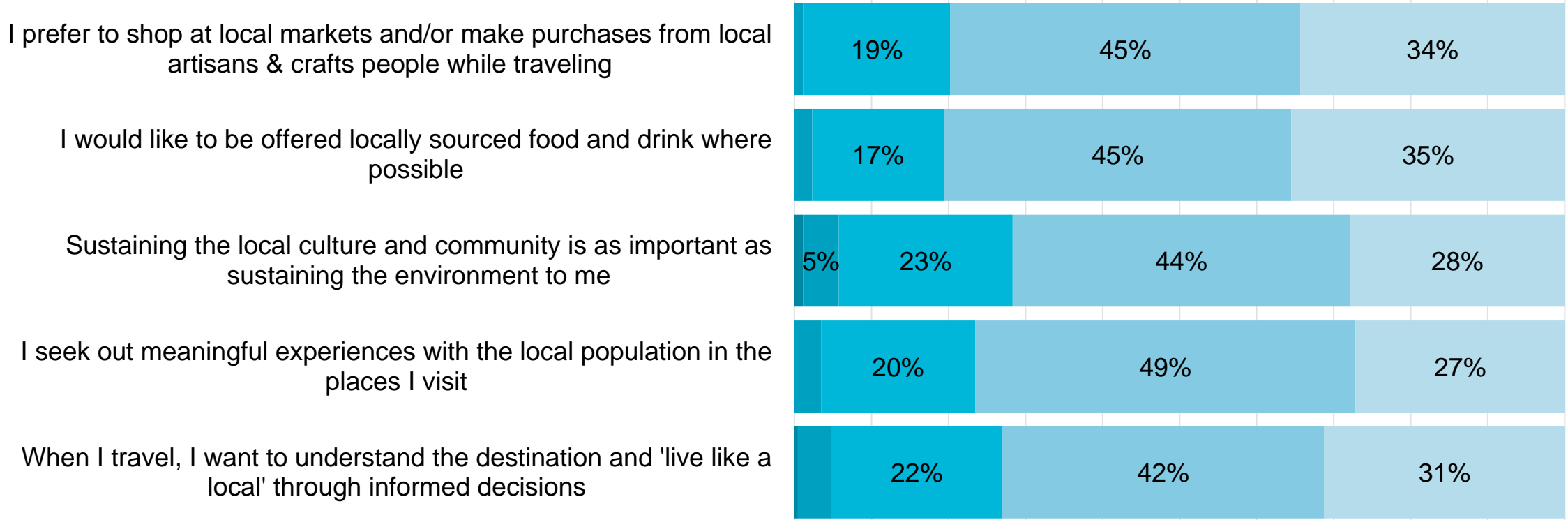


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=176

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

Agreement Regarding Sustaining Local Culture While Traveling

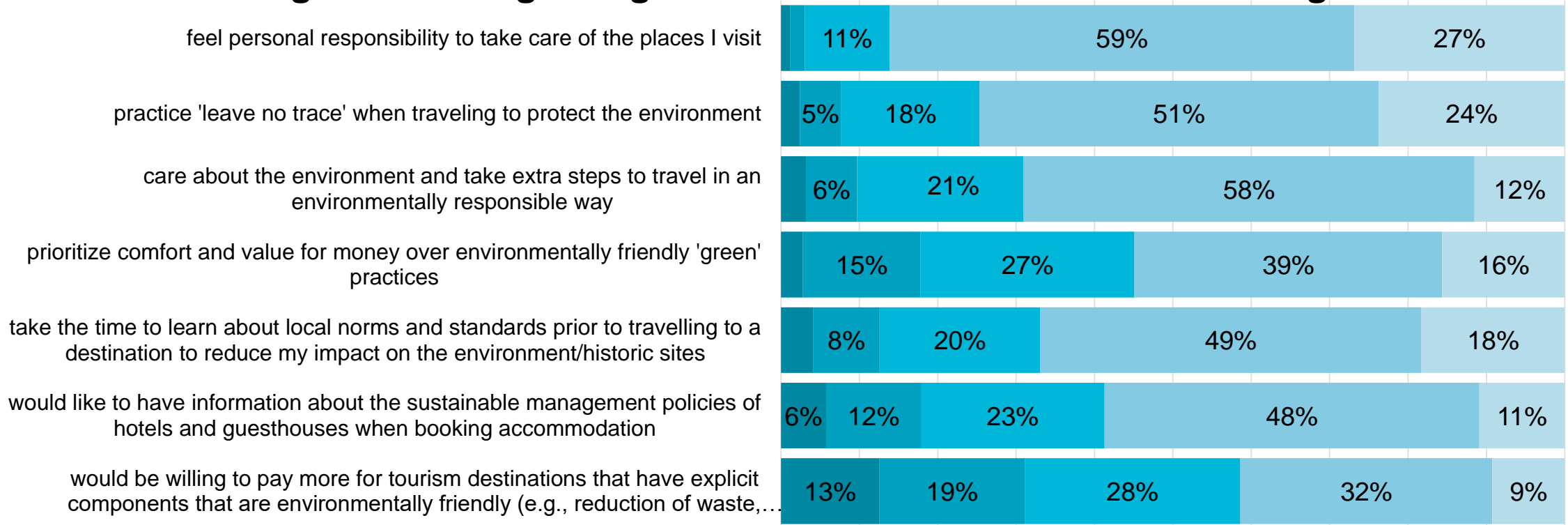


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=176

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

Agreement Regarding Sustainable Practices While Traveling

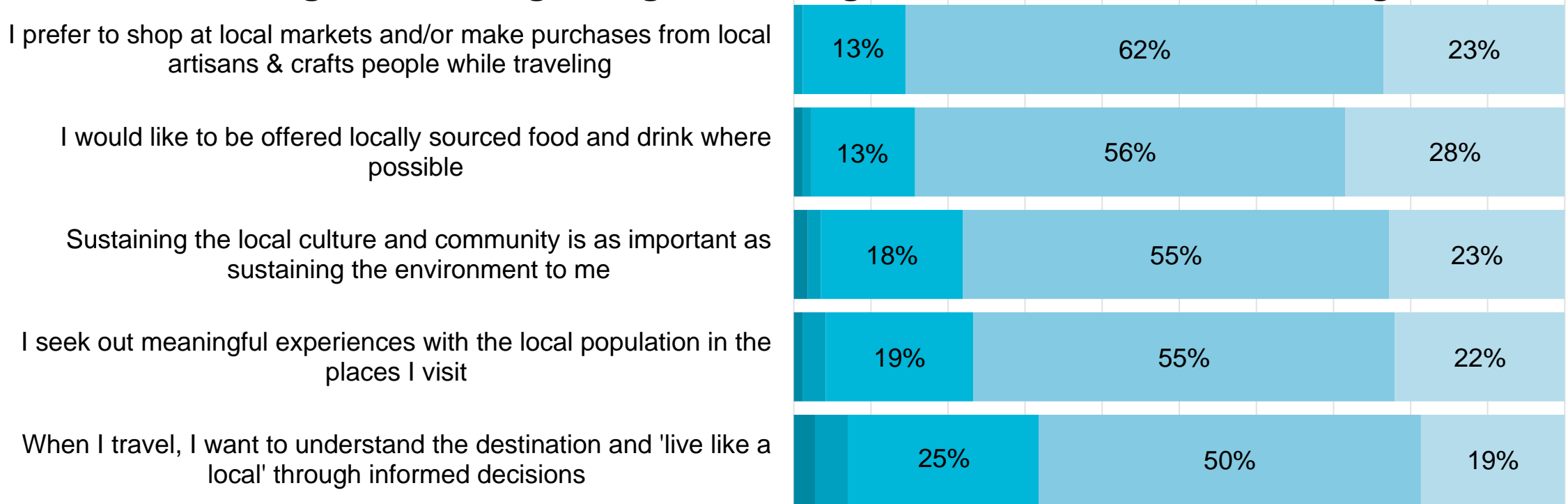


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=174

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

Agreement Regarding Sustaining Local Culture While Traveling

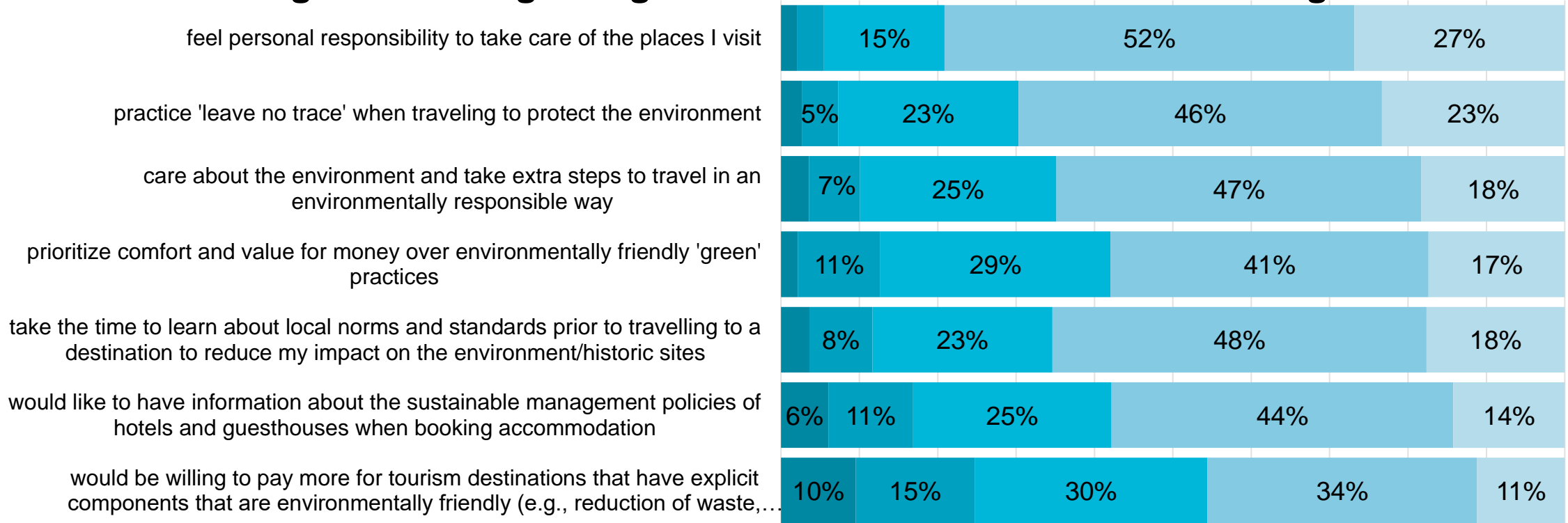


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=174

Canada Long Distance Travelers: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustainable Practices While Traveling

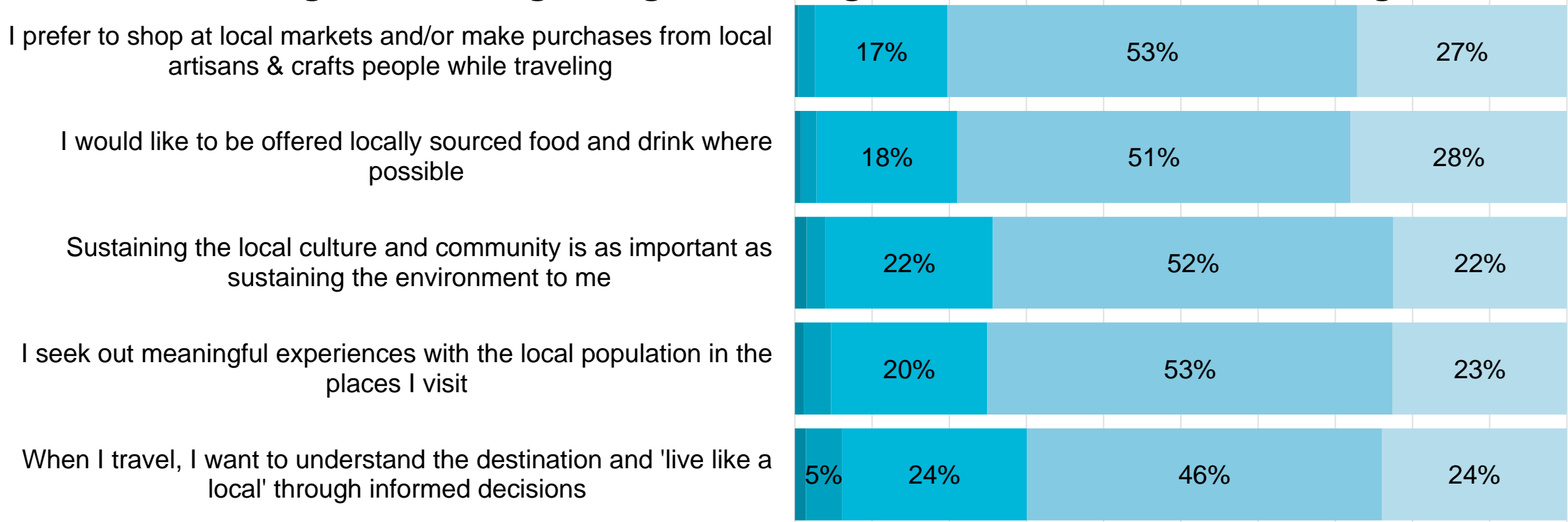


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=981

Canada Long Distance Travelers: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling

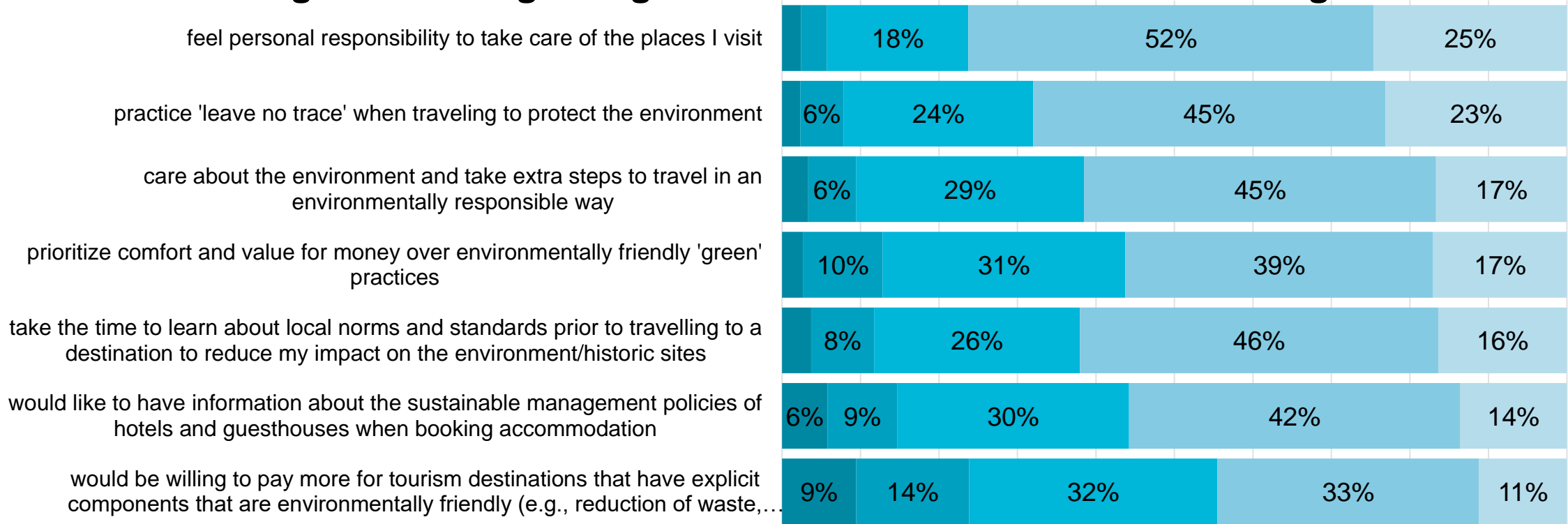


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=981

Canada Nat Rep: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustainable Practices While Traveling

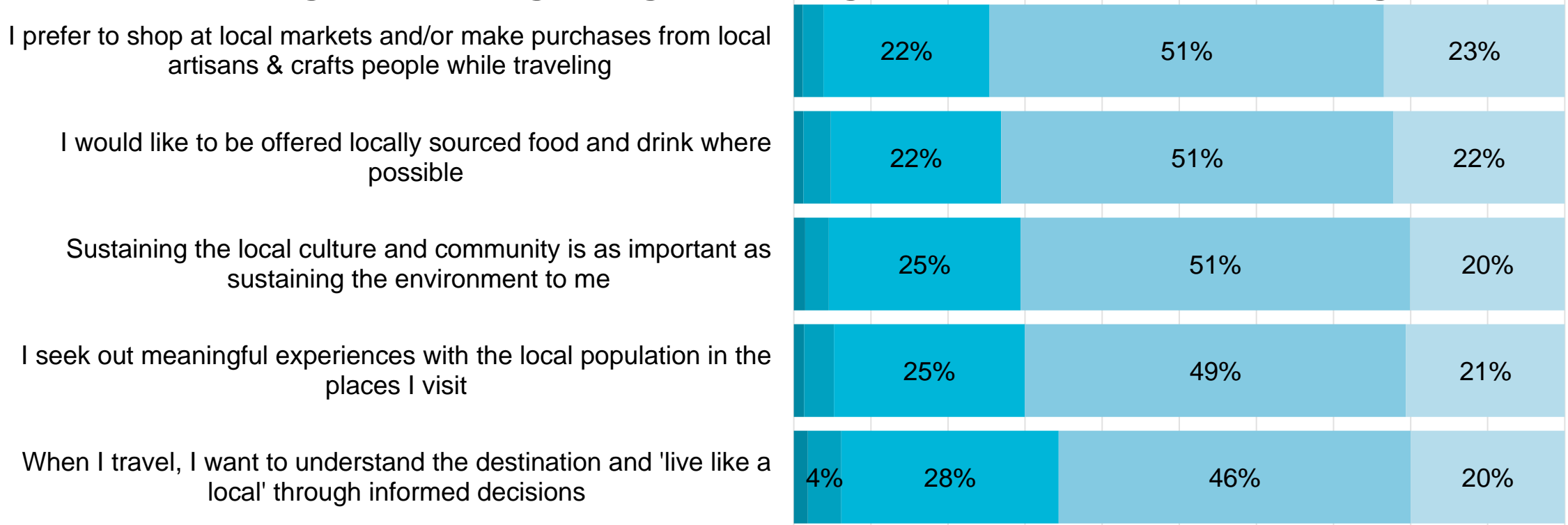


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=2,314

Canada Nat Rep: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling

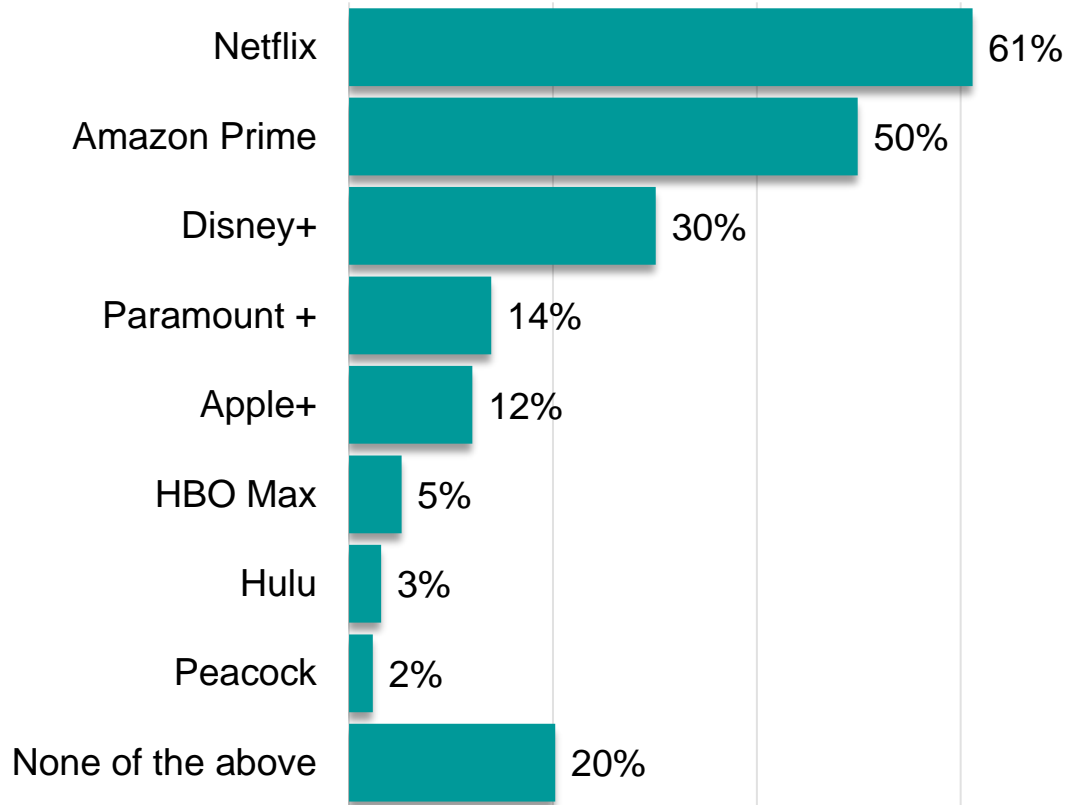


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

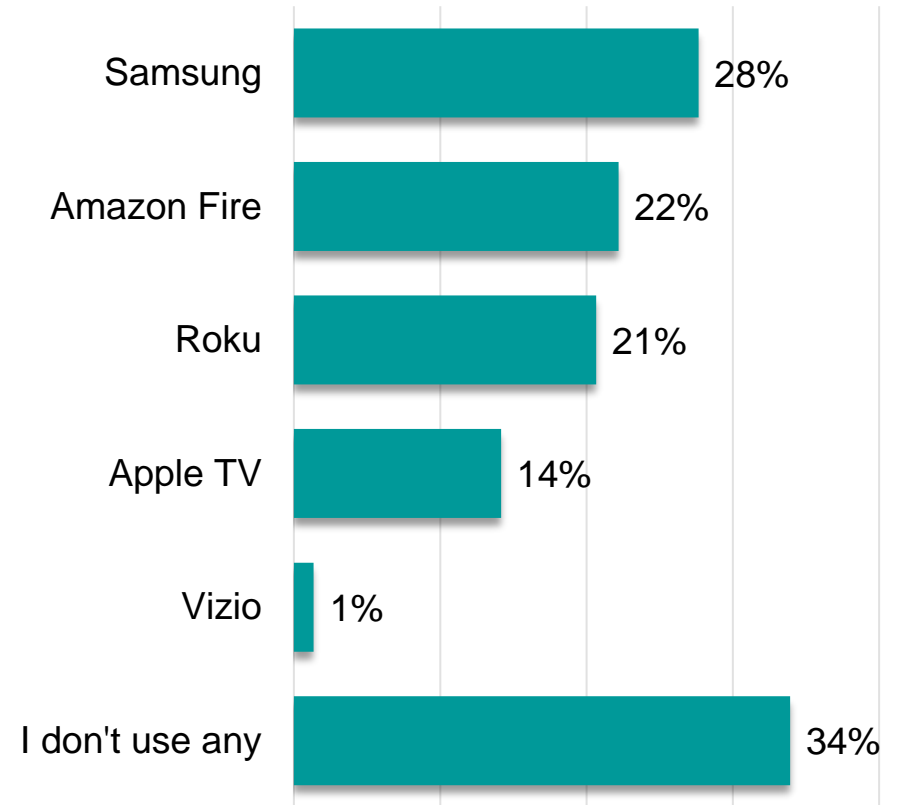
Sample Size: n=2,314

Canada Media Consumption

Streaming Platforms Used Weekly



Connected Device Used

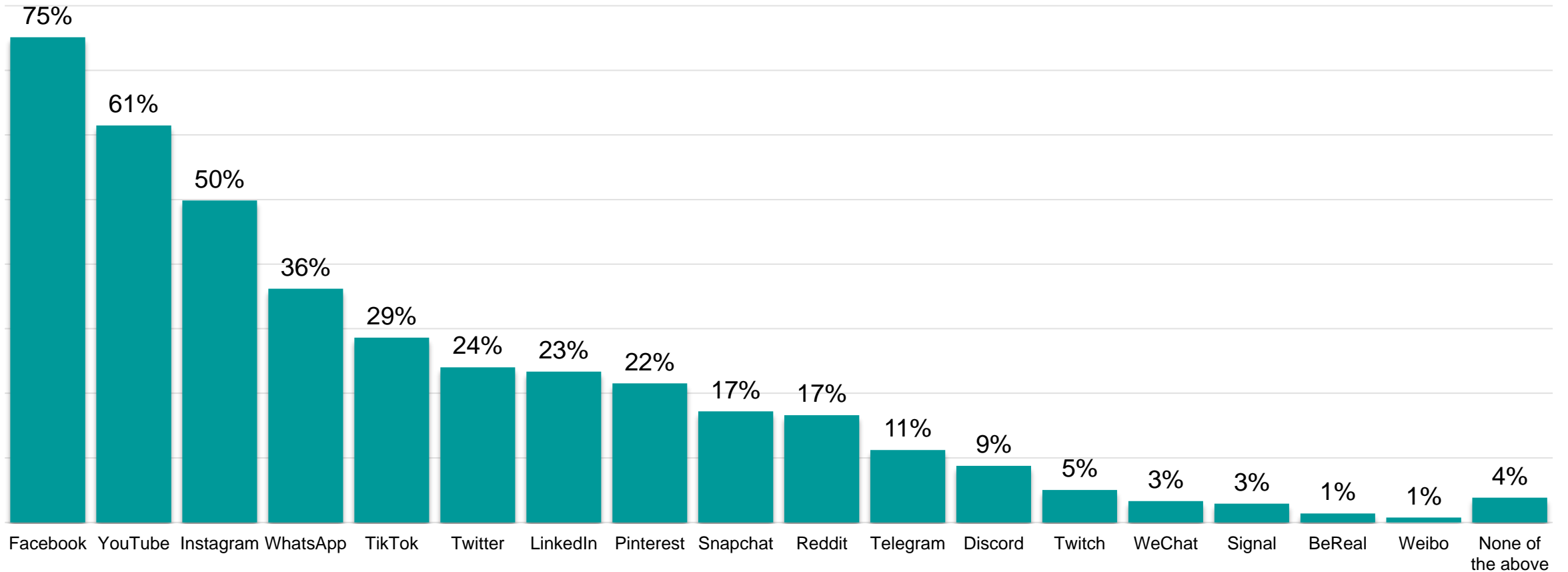


Sample Size: n=2,314

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=2,314

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 | 35% |
| Radio | 8% |
| TV commercials | 26% |
| Newspaper | 11% |
| Friends/Family | 49% |
| Social Media | 38% |
| YouTube | 37% |
| Out of Home Advertising (e.g., poster billboards, bus shelter advertisements, etc.) | 8% |
| Email | 16% |
| I don't recall | 12% |

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 | 35% |
| I book travel to the destination almost immediately | 9% |
| I don't do anything | 18% |
| None of the above | 7% |

Sample Size: n=2,314

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**