



Vision Insights Australia Traveler Profiles H1 2026 (January 1 – June 30, 2026)

July 24, 2026



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., Canada, Japan, 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., Canada, Japan, Australia, and Korea
- For the Australia Profiles, the sample size for the Avid Traveler segment is below the minimum sample size requirement 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

Australia - Segment Definitions

Family Traveler

- Gross household income is \$150k+
- Age is 35-50
- Has children under the age of 18
- Either takes international vacations or whose most recent leisure destination was Hawai'i/USA/or Southeast Asia in the past 12 months

Avid Traveler

- Gross household income is \$100k+
- Age is 45-65
- Been to Hawai'i more than 2x in the past
- Either takes international vacations or likely/very likely to book an air trip in the next 12 months

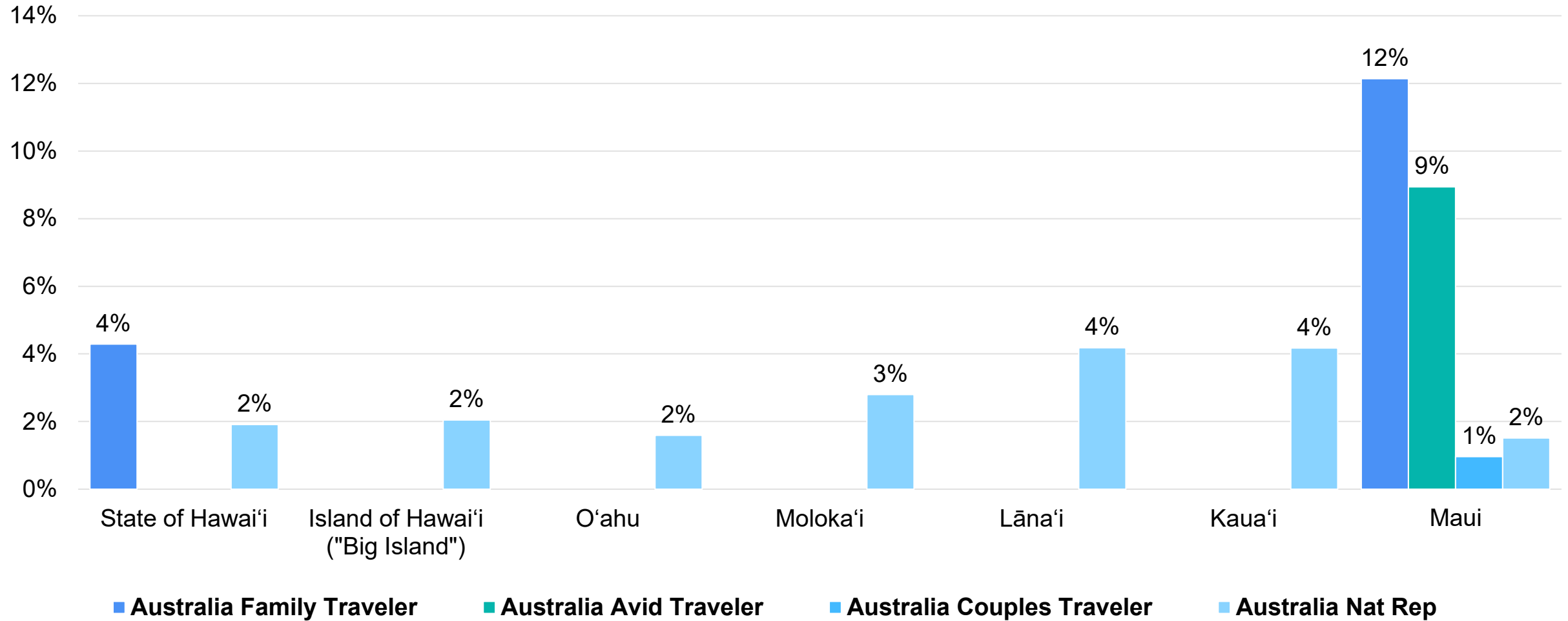
Couples Traveler

- Gross household income is \$100k+
- Married or living with partner
- Age is 30-50
- Not traveling with children under the age of 18
- Either takes international vacations, are likely/very likely to book an air trip in the next 12 months, or whose most recent leisure destination was either Hawai'i/Europe/Bali/Fiji/California/or Thailand in the past two years

Nationally Representative Sample (Nat Rep)

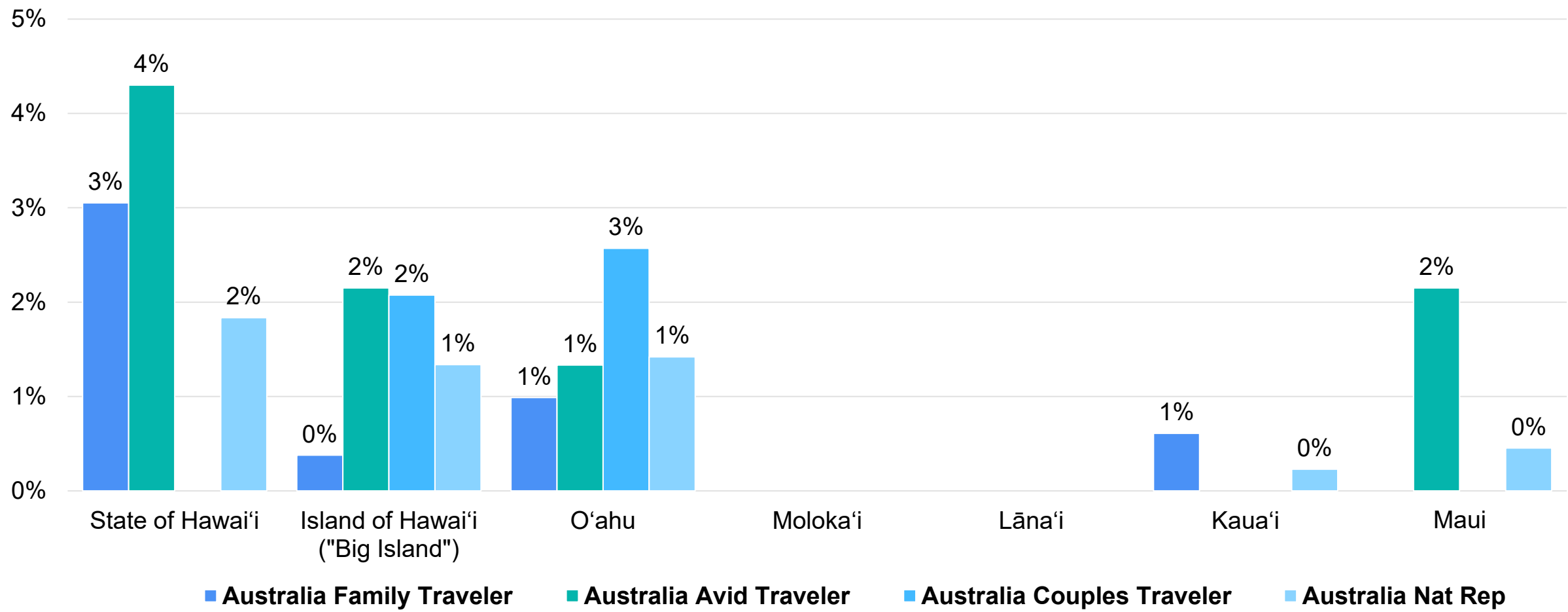
- Representative of Australia adults in terms of age, gender, social class and education

Australia - Leisure Trip in Past 12 Months



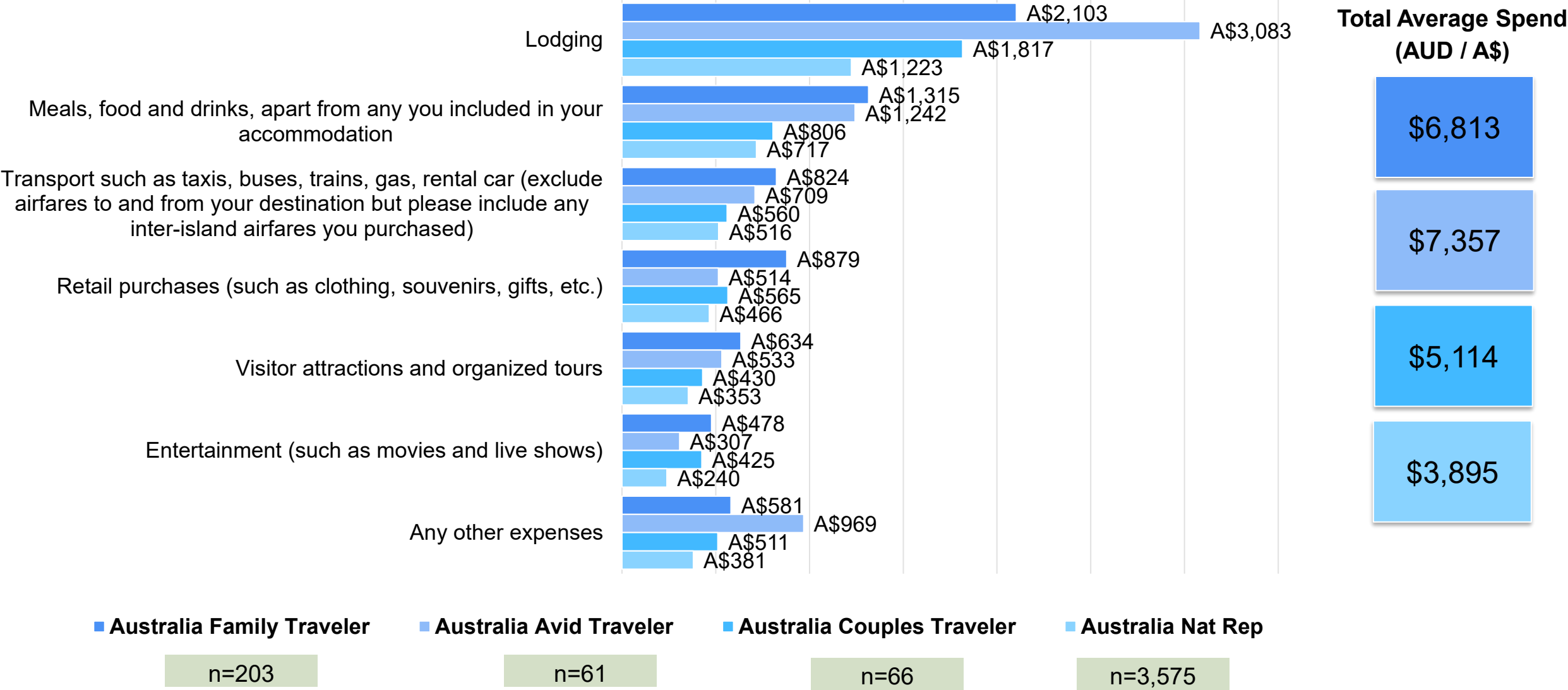
Sample Min. n=50

Australia - Next Destination for Leisure Trip



Sample Min. n=50

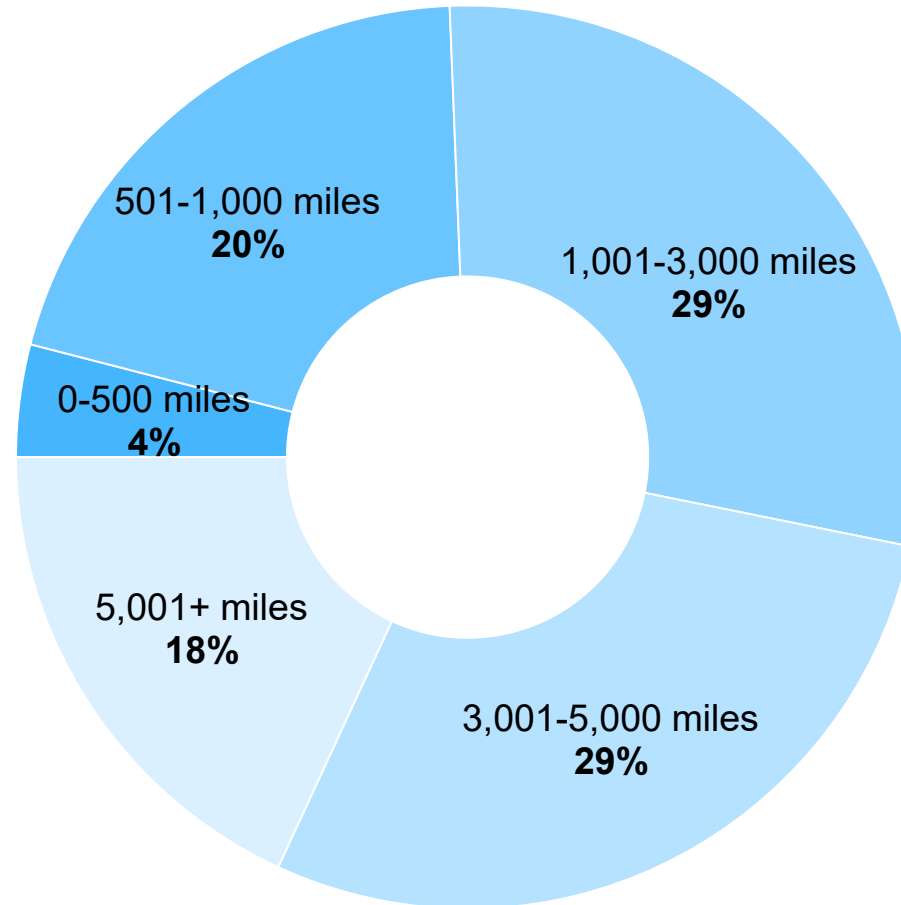
Australia - Total Annual Holiday Spend



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.

Australia Family Travelers: Annual Vacation

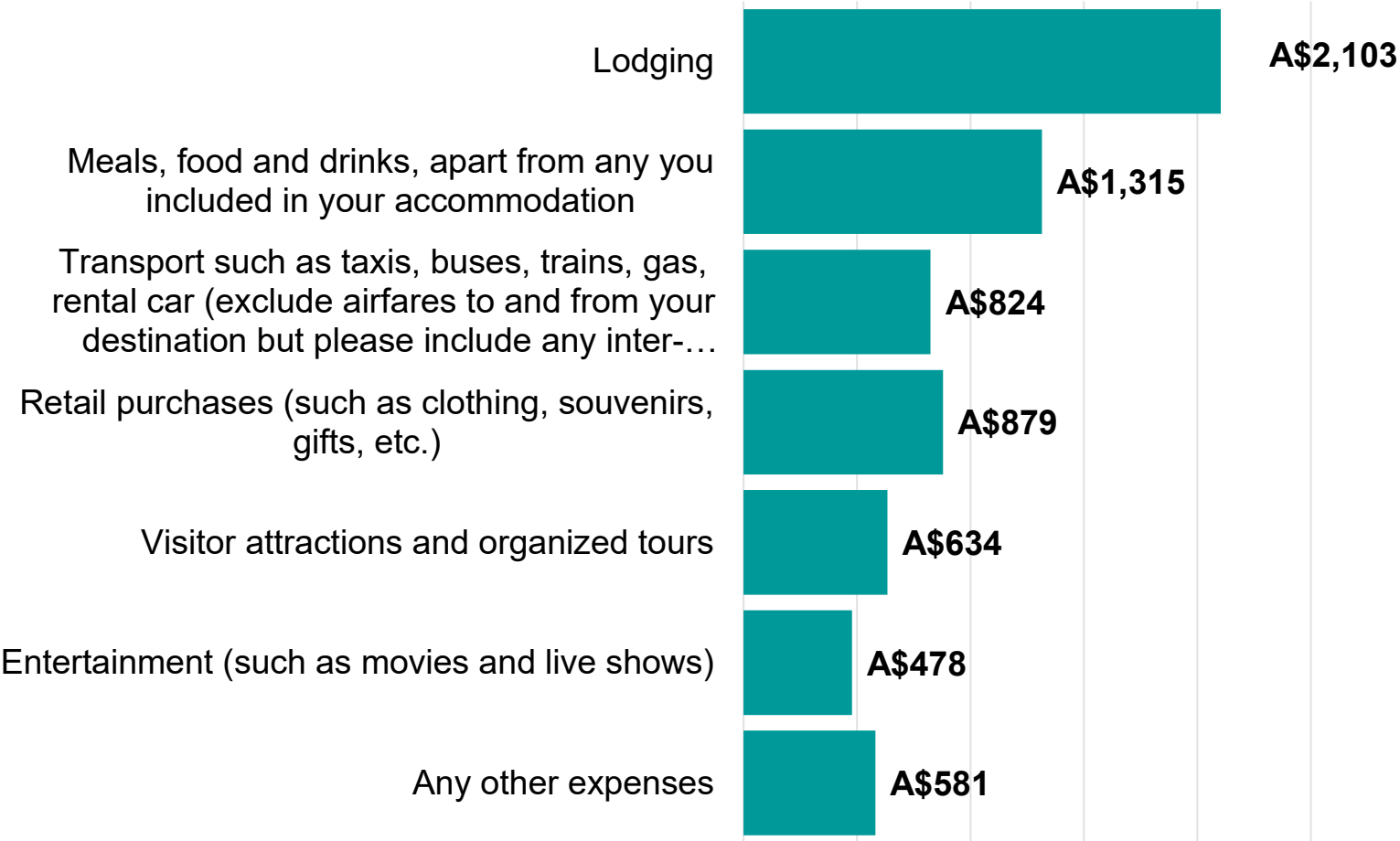
Distance Travelled on Annual Vacation



Sample Size: n=203

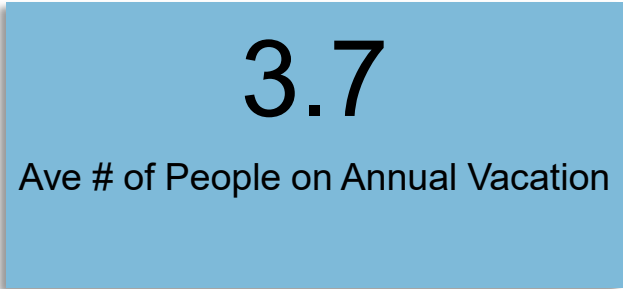
Australia Family Travelers: Annual Vacation

Average Spend



Sample Size: n=203

Spend Per Person Per Day

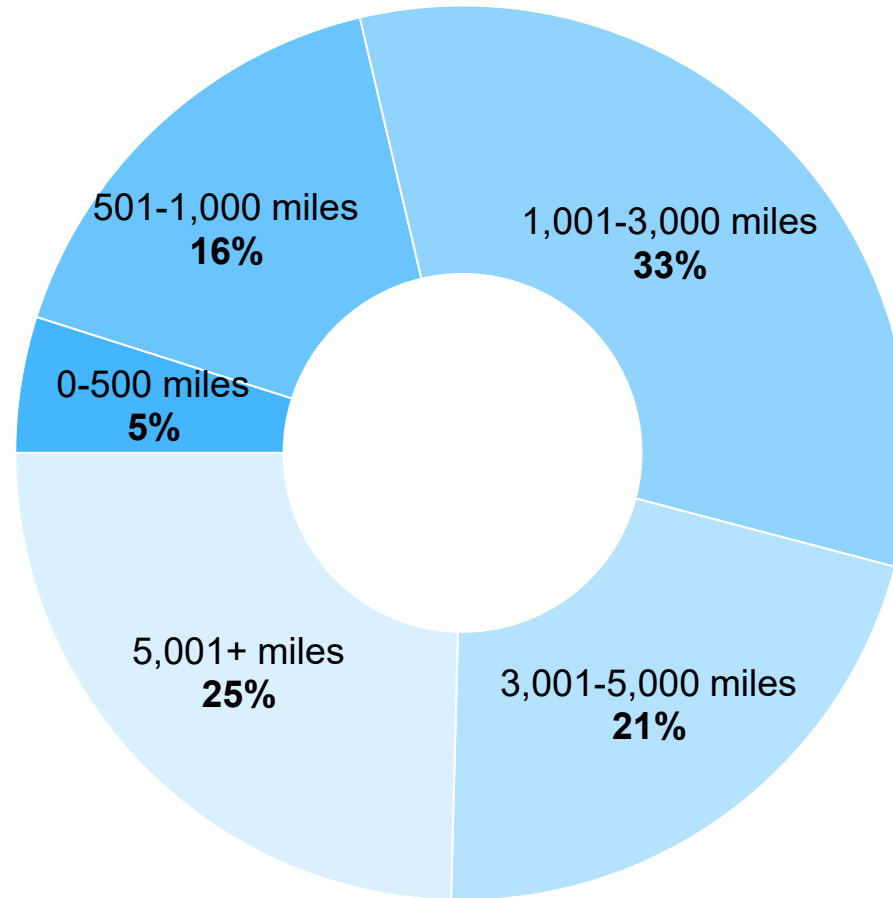


A\$248.95

Ave. Per Person Per Day Spend

Australia Avid Travelers: Annual Vacation

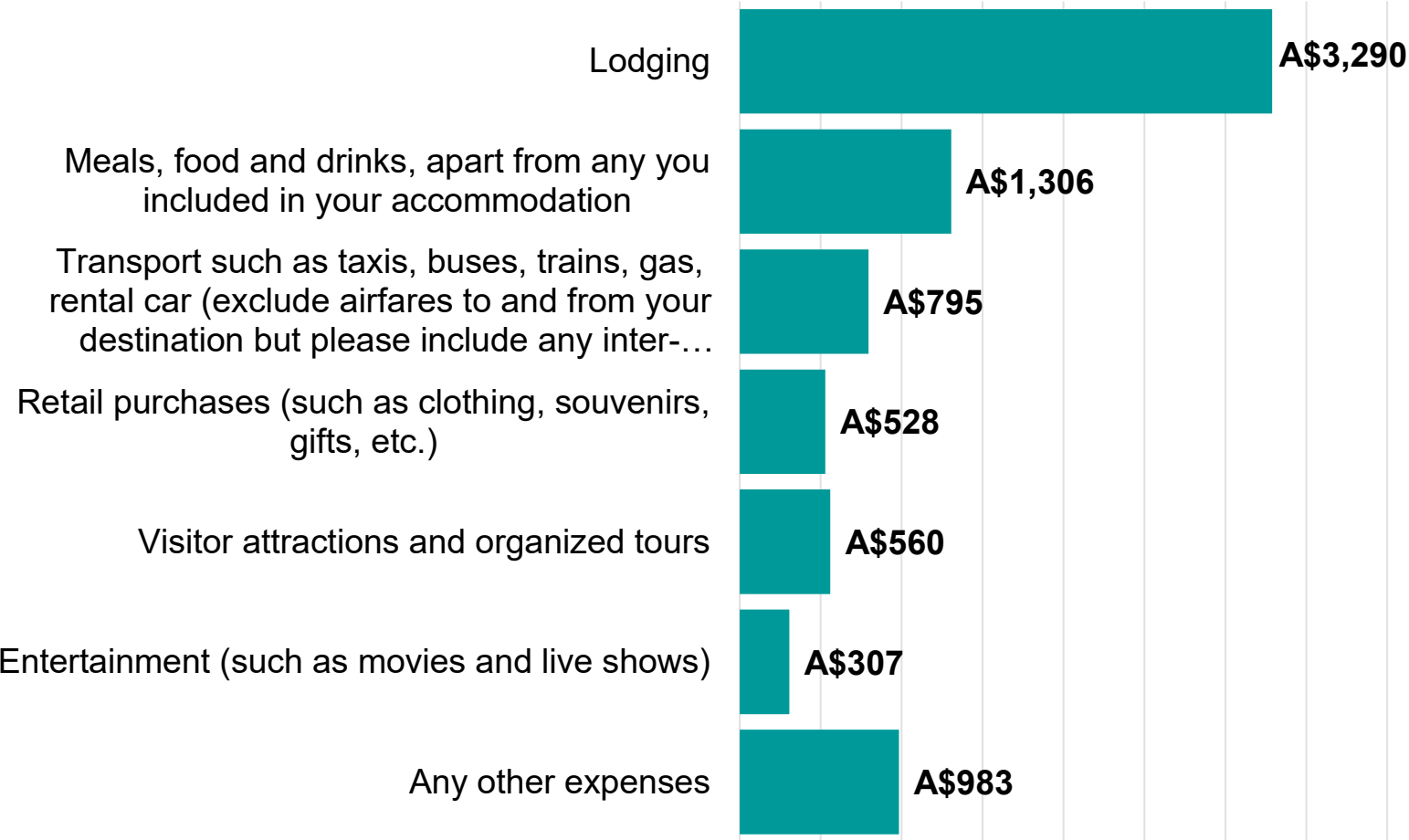
Distance Travelled on Annual Vacation



Sample Size: n=61

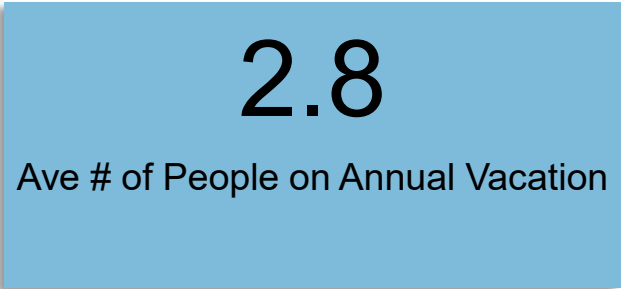
Australia Avid Travelers: Annual Vacation

Average Spend



Sample Size: n=61

Spend Per Person Per Day

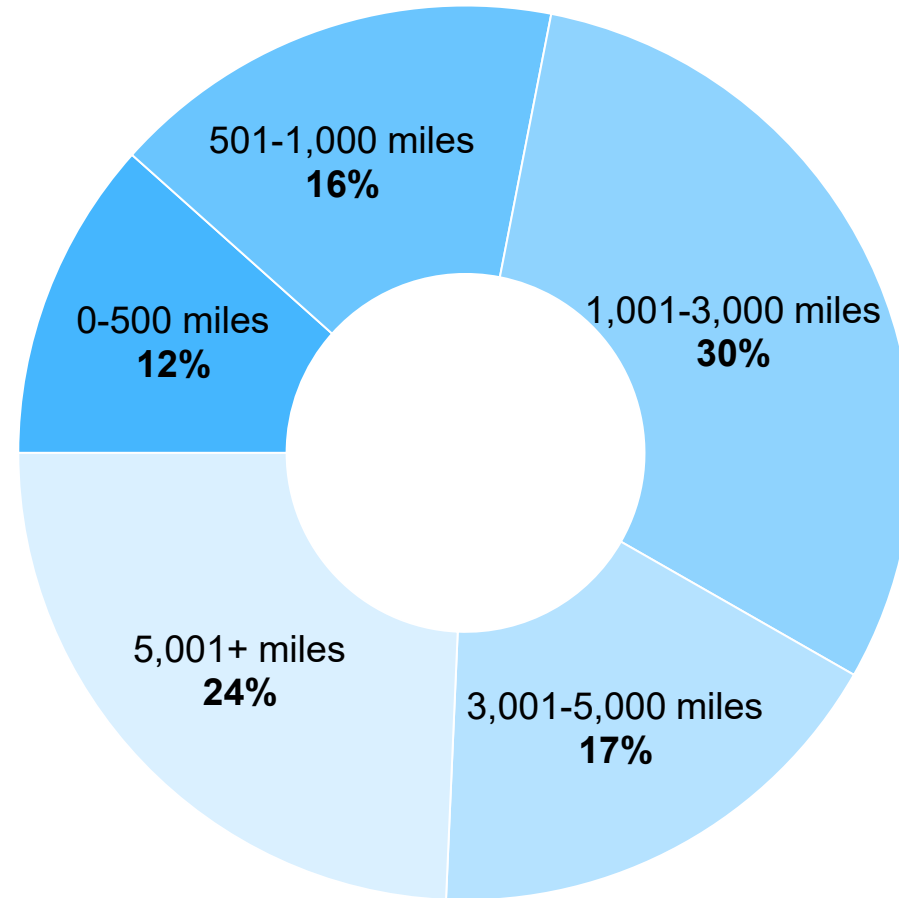


A\$243.76

Ave. Per Person Per Day Spend

Australia Couples Travelers: Annual Vacation

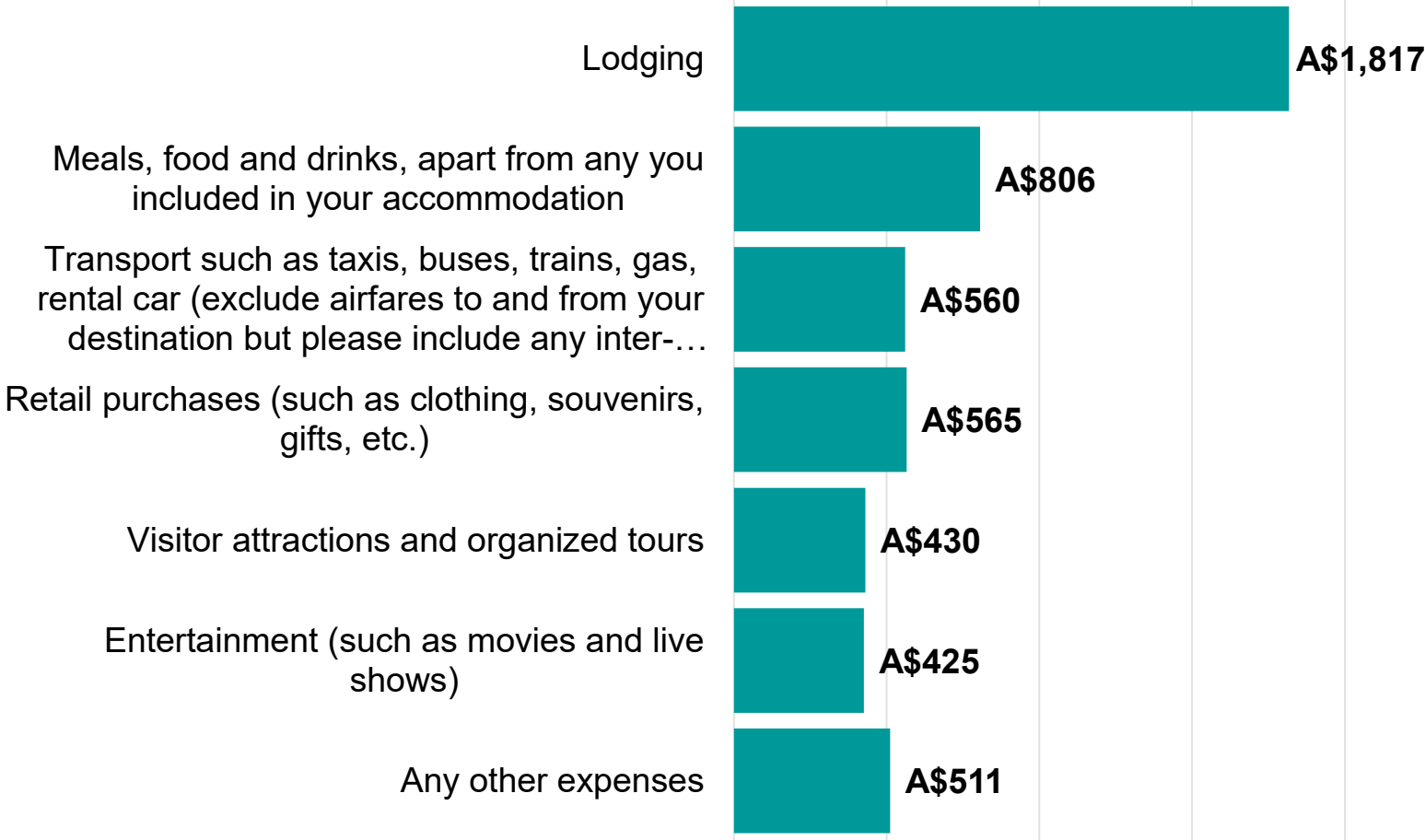
Distance Travelled on Annual Vacation



Sample Size: n=66

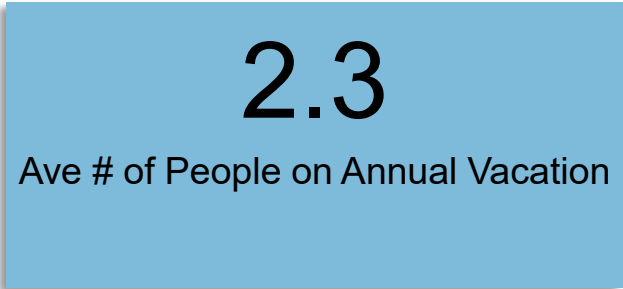
Australia Couples Travelers: Annual Vacation

Average Spend



Sample Size: n=66

Spend Per Person Per Day

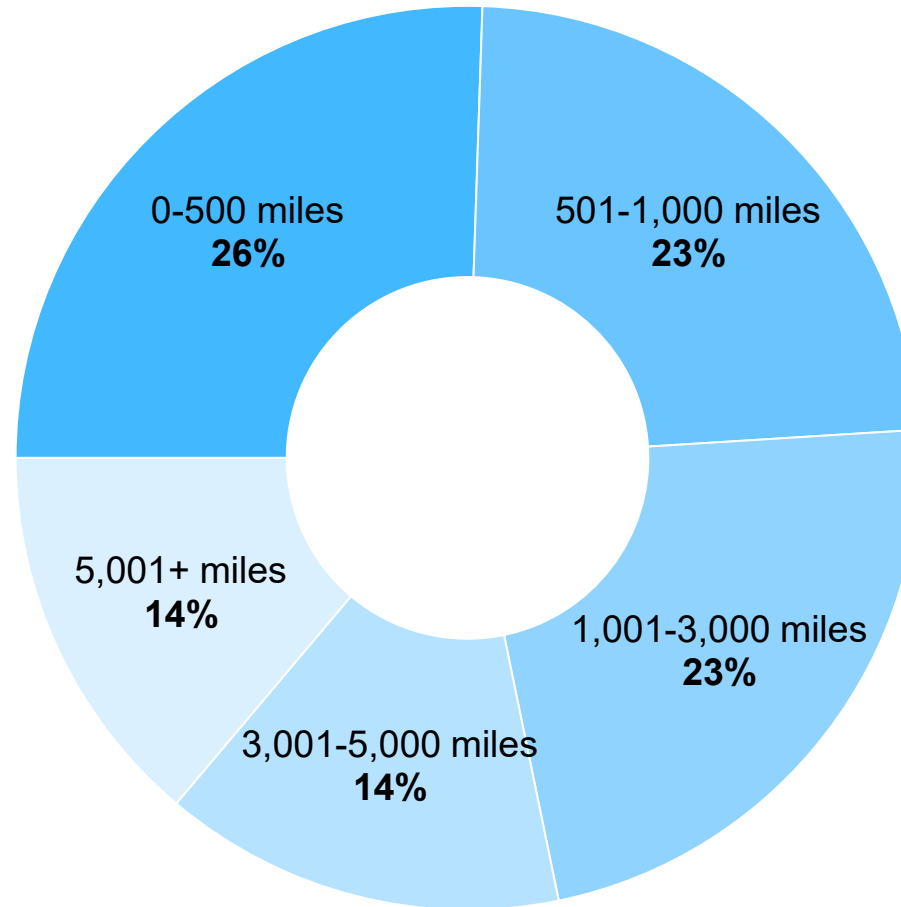


A\$285.07

Ave. Per Person Per Day Spend

Australia Nat Rep: Annual Vacation

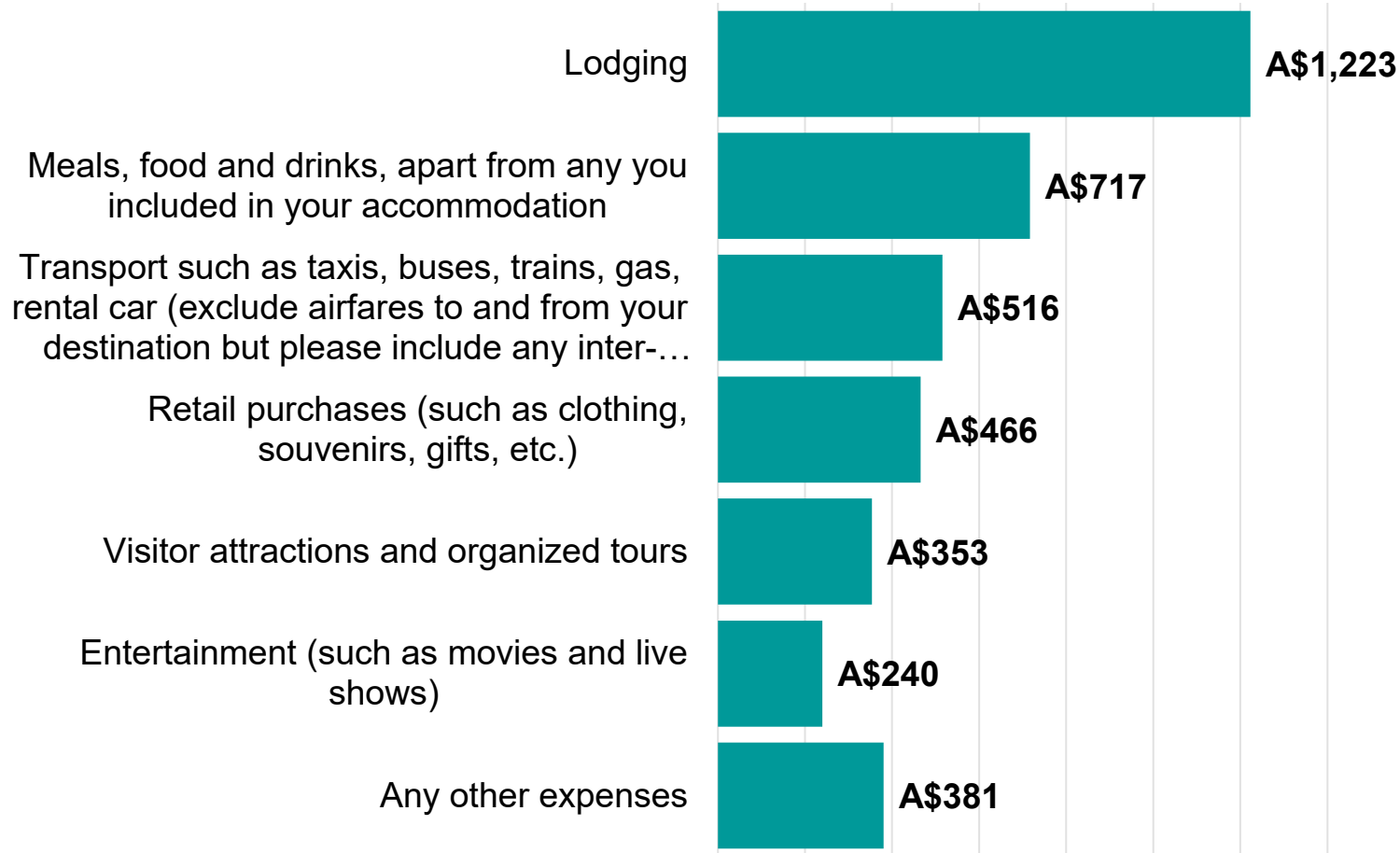
Distance Travelled on Annual Vacation



Sample Size: n=3,575

Australia Nat Rep: Annual Vacation

Average Spend



Sample Size: n=3,575

Spend Per Person Per Day

8.0

Ave # Nights on Annual Vacation

2.7

Ave # of People on Annual Vacation



A\$181.00

Ave. Per Person Per Day Spend

Australia - Importance of Travel Factors

	Very Important 5			
	Australia: Family Traveler	Australia: Avid Traveler	Australia: Couples Traveler	Australia Market
Value for money	62%	52%	53%	55%
Comfort and accessibility	57%	49%	38%	45%
Natural attractions/activities	51%	48%	49%	42%
Family friendly locations and activities	49%	26%	42%	35%
Opportunity to experience local restaurants/businesses	52%	37%	37%	35%
Cultural attractions	45%	41%	36%	36%
Entertainment and nightlife	40%	24%	20%	24%
Consideration of sustainable principles	40%	25%	23%	24%
Safe and secure destination	65%	58%	58%	59%

Sample Size:

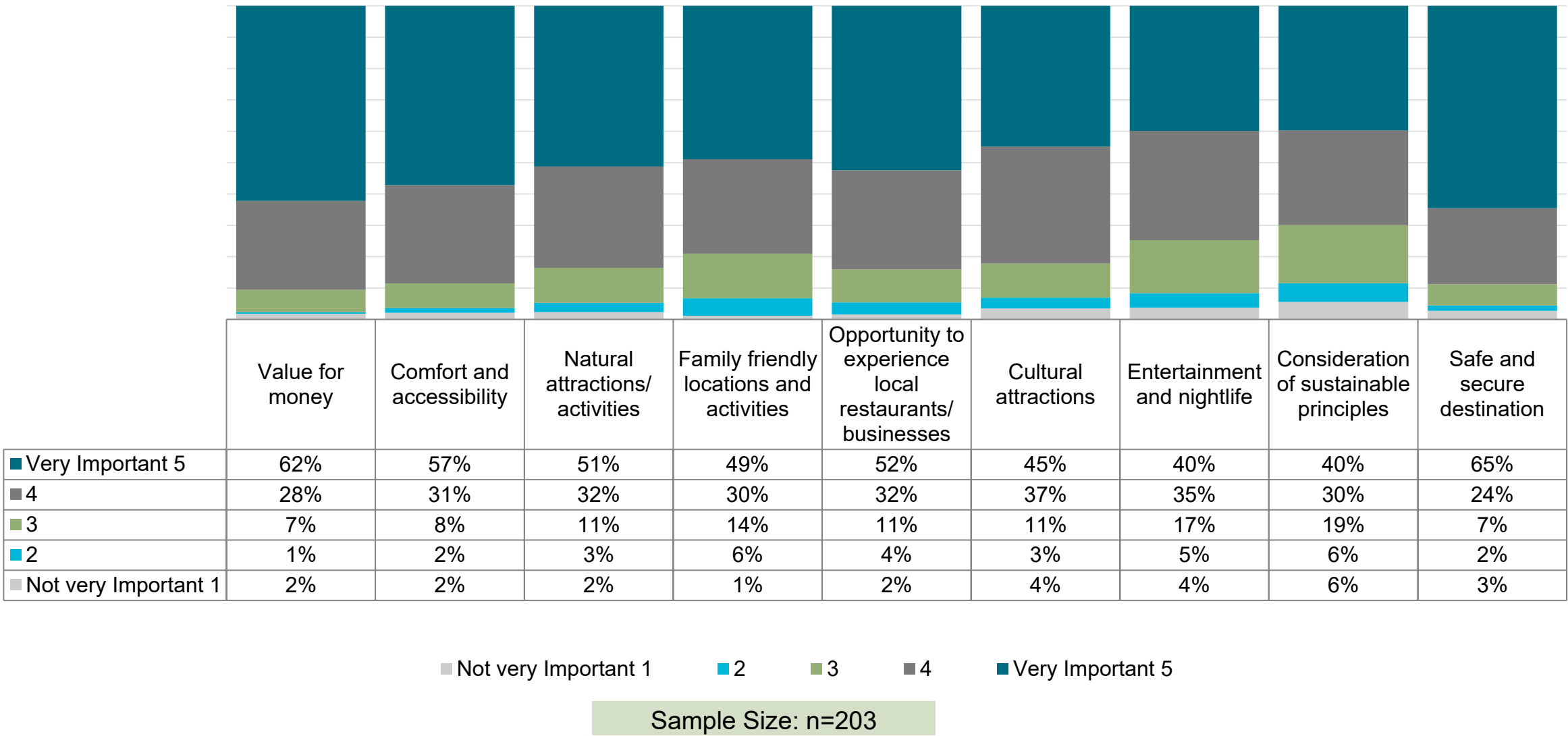
n=203

n=61

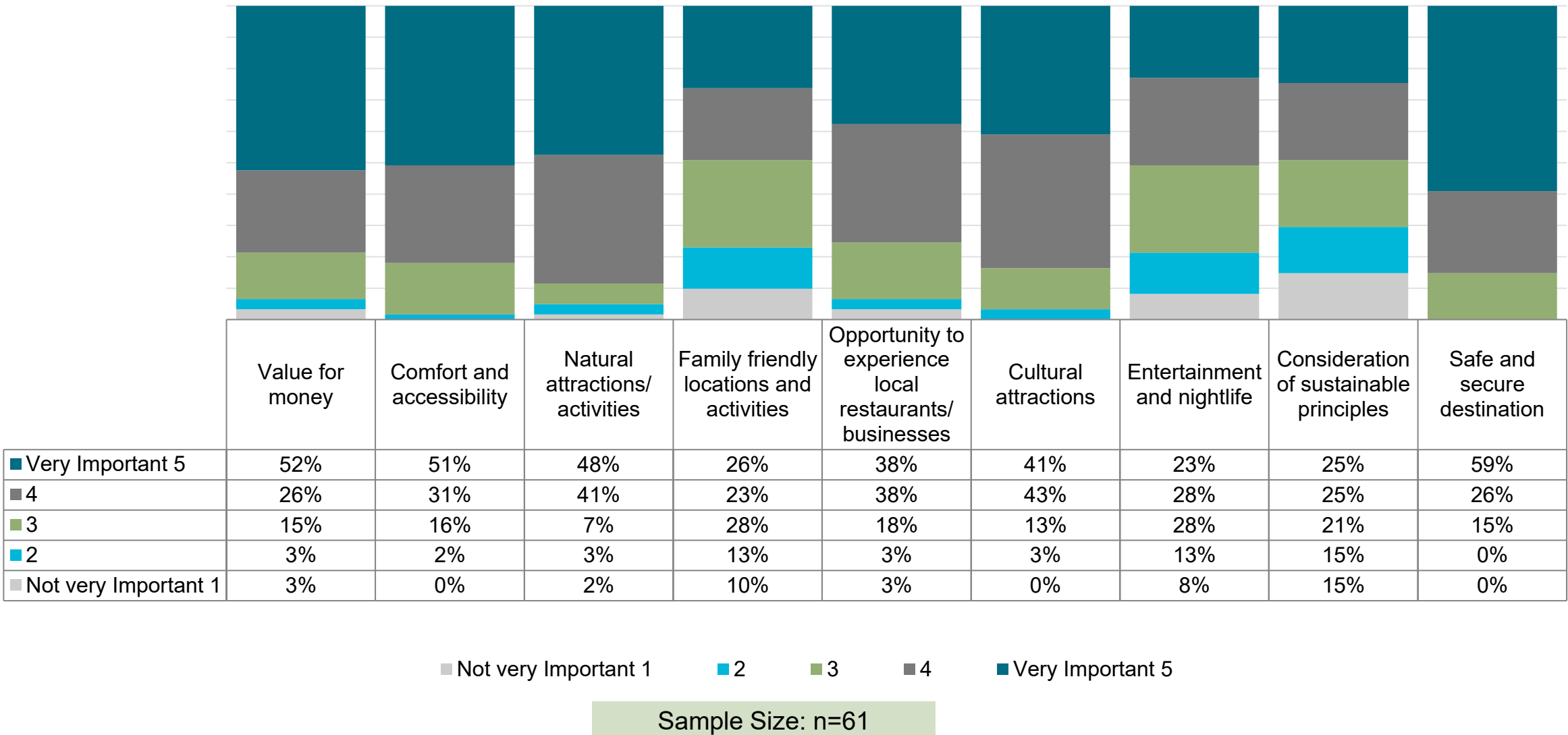
n=66

n=3,575

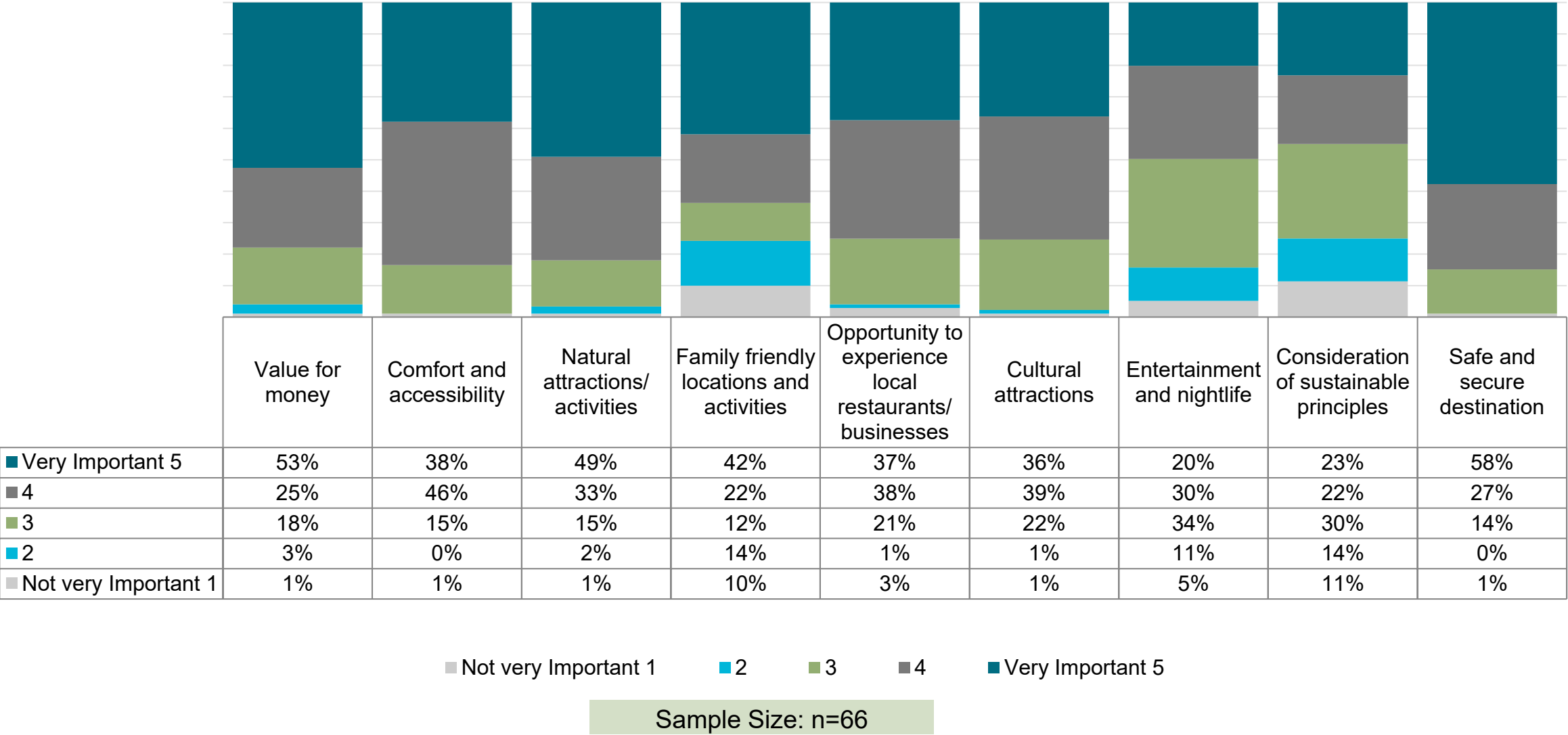
Australia Family Travelers: Importance of Travel Factors



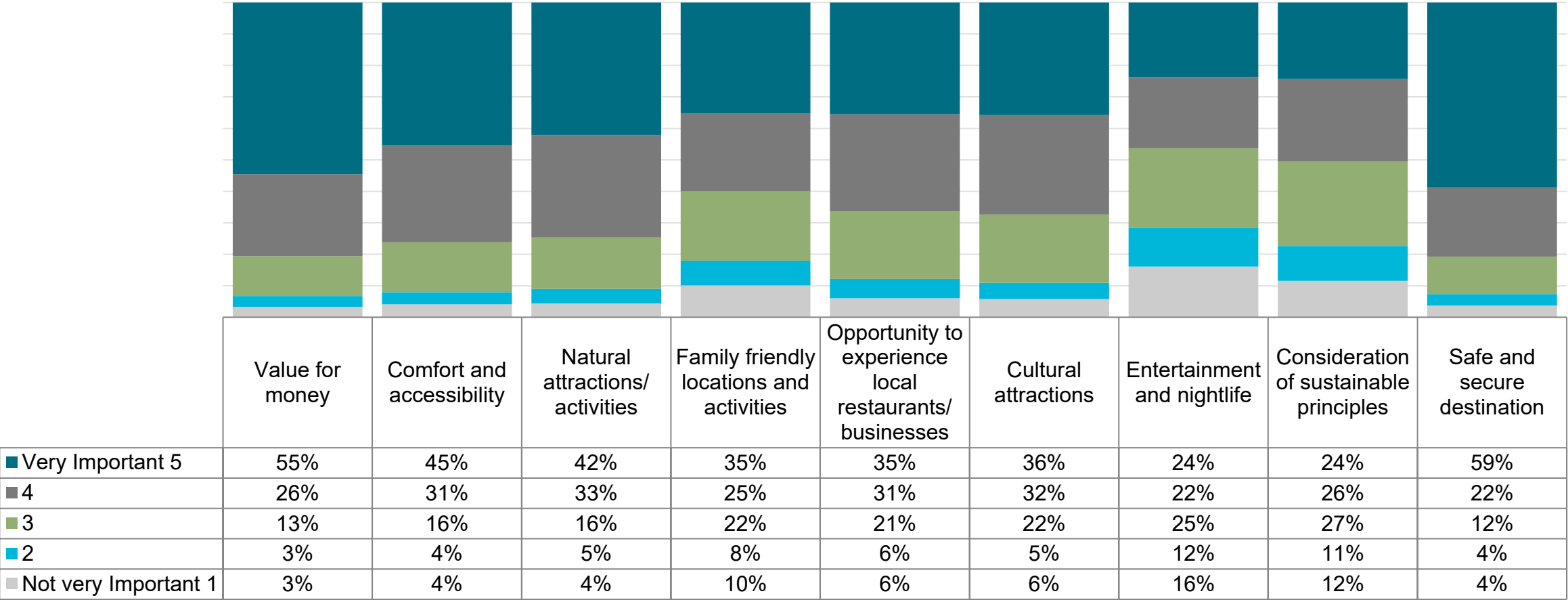
Australia Avid Travelers: Importance of Travel Factors



Australia Couples Travelers: Importance of Travel Factors



Australia Nat Rep: Importance of Travel Factors



Not very Important 1 2 3 4 Very Important 5

Sample Size: n=3,575

Australia - Hawai'i as an Aspirational Destination

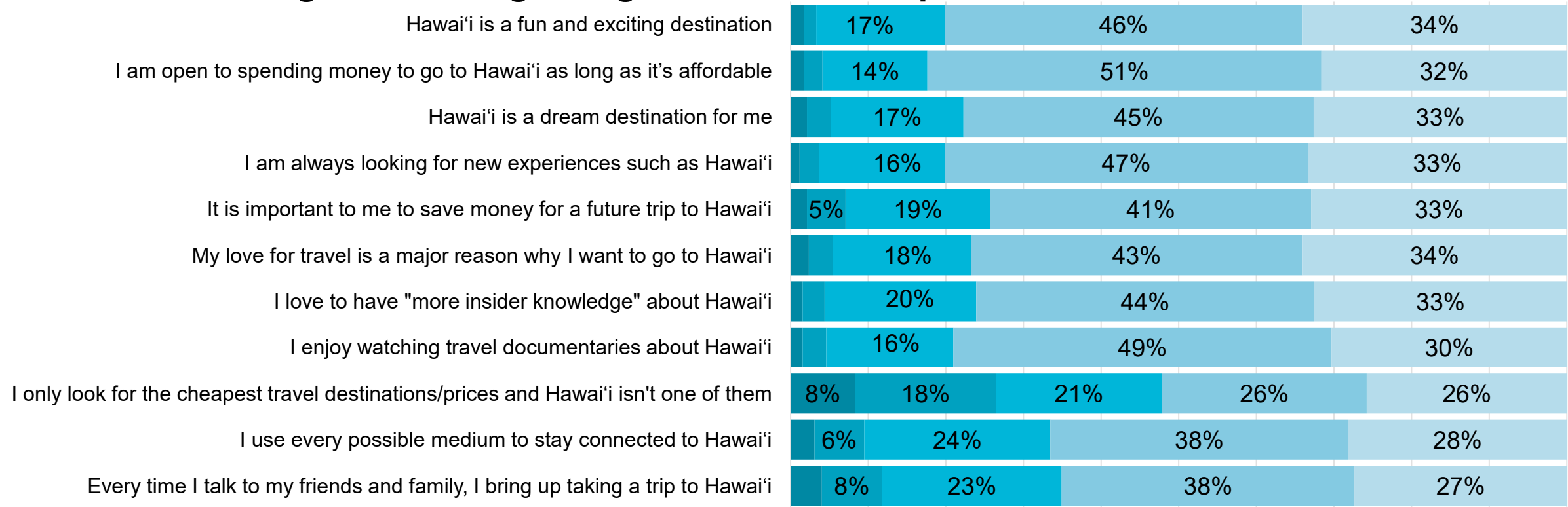
Agreement Regarding Hawai'i as a Travel Destination (Strongly Agree)



Please tell us how much you agree or disagree with each statement below about Hawai'i as a travel destination to you?

Australia Family Travelers: Hawai'i as an Aspirational Destination

Agreement Regarding Hawai'i as an Aspirational Destination

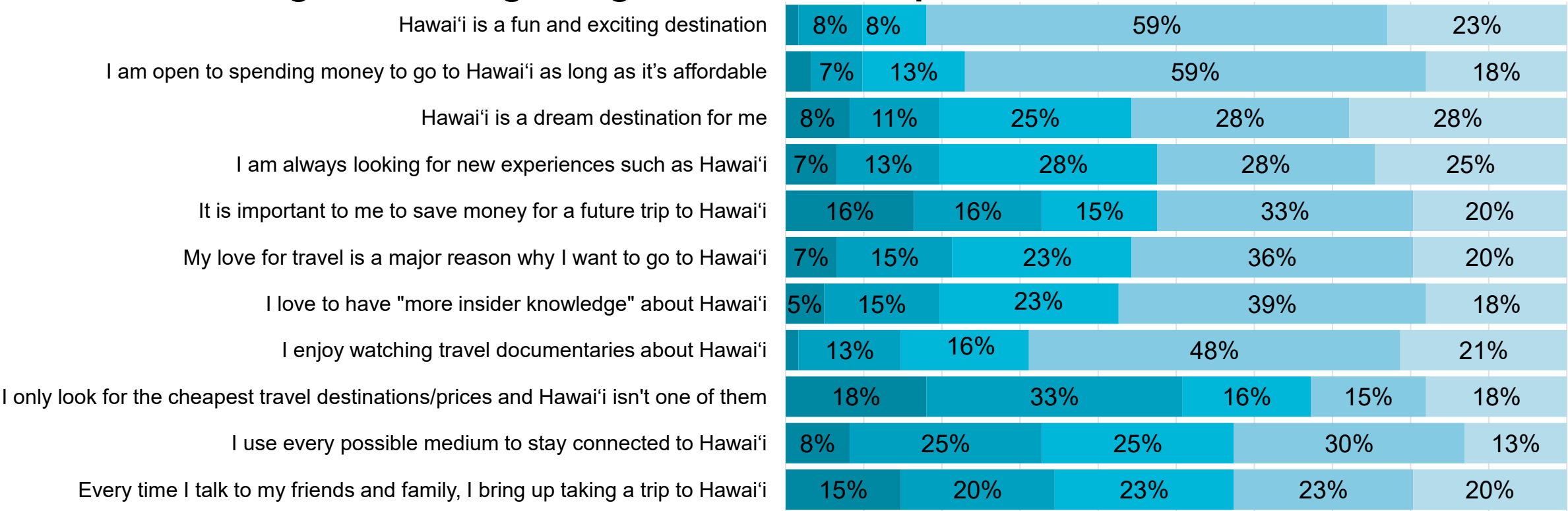


■ Strongly disagree ■ Disagree ■ Neither agree nor disagree ■ Agree ■ Strongly agree

Sample Size: n=203

Australia Avid Travelers: Hawai'i as an Aspirational Destination

Agreement Regarding Hawai'i as an Aspirational Destination

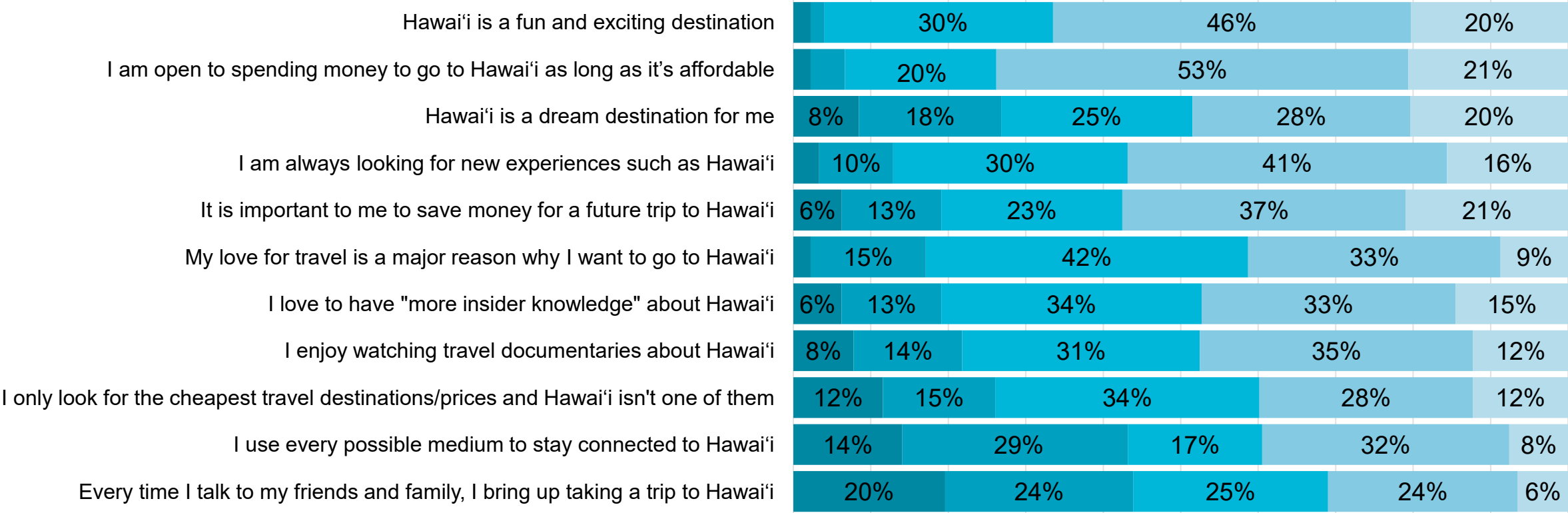


■ Strongly disagree ■ Disagree ■ Neither agree nor disagree ■ Agree ■ Strongly agree

Sample Size: n=61

Australia Couples Travelers: Hawai'i as an Aspirational Destination

Agreement Regarding Hawai'i as an Aspirational Destination



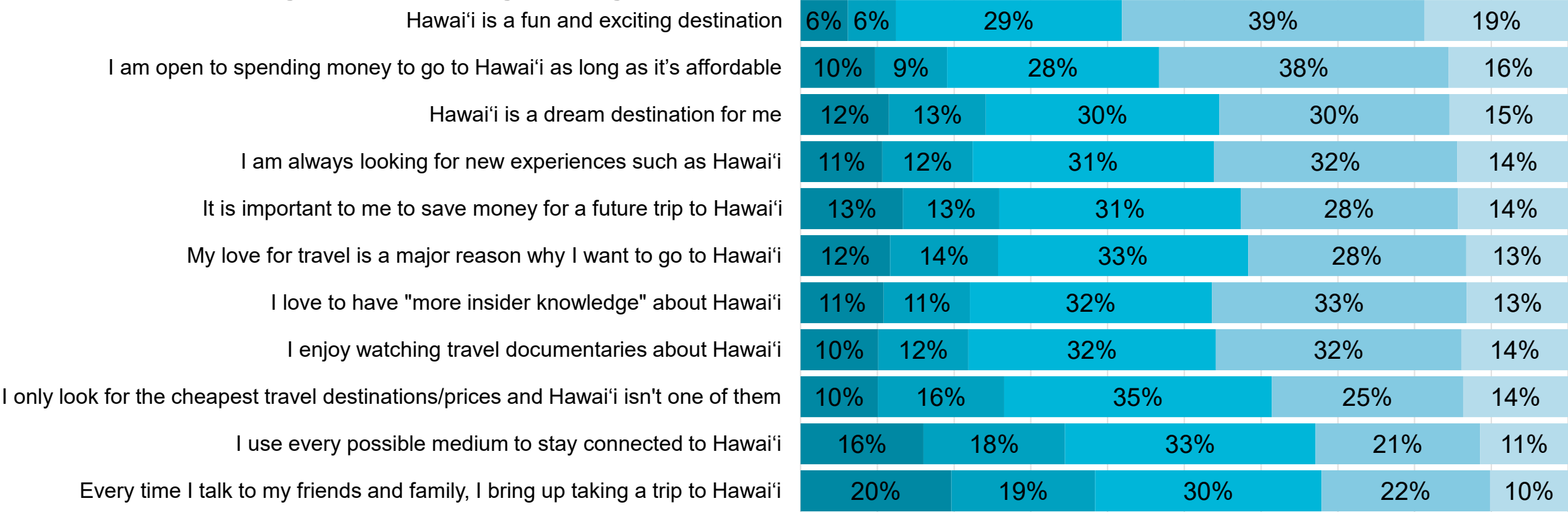
■ Strongly disagree ■ Disagree ■ Neither agree nor disagree ■ Agree ■ Strongly agree

Sample Size: n=66

Australia Nat Rep:

Hawai'i as an Aspirational Destination

Agreement Regarding Hawai'i as an Aspirational Destination

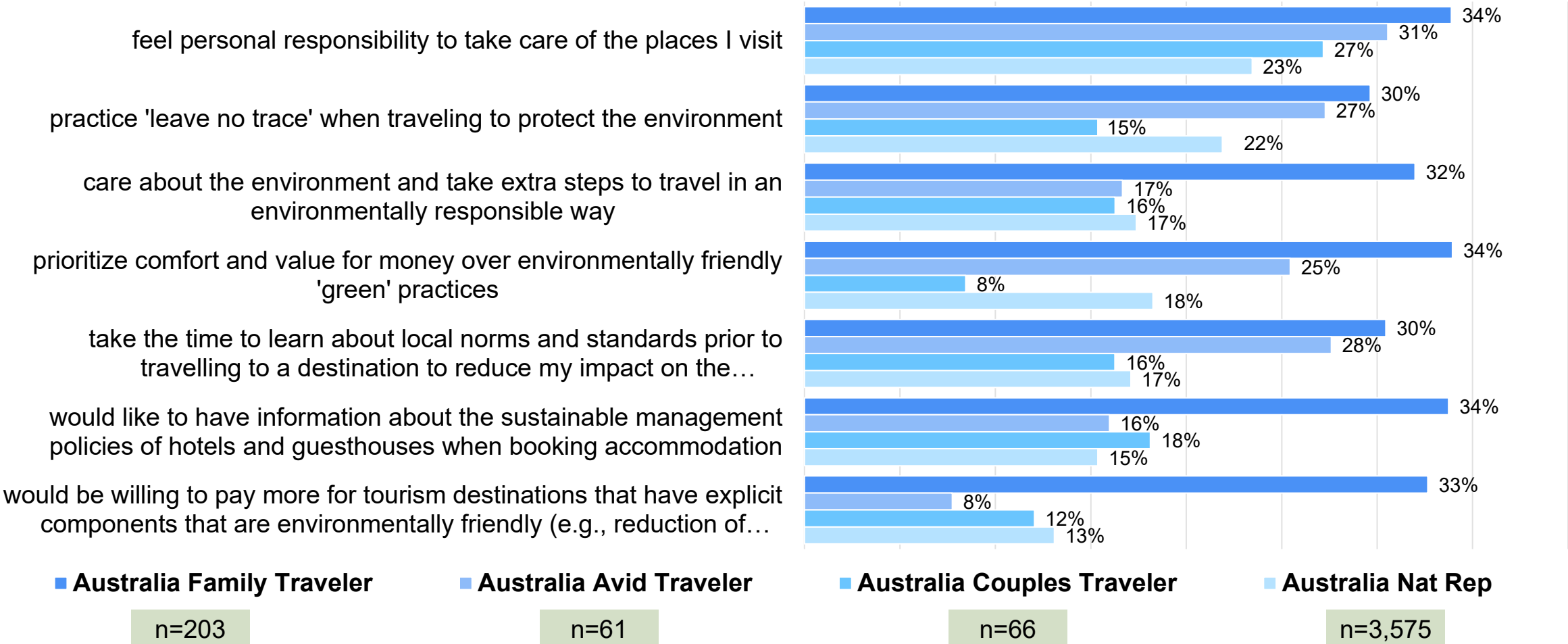


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Sample Size: n=3,575

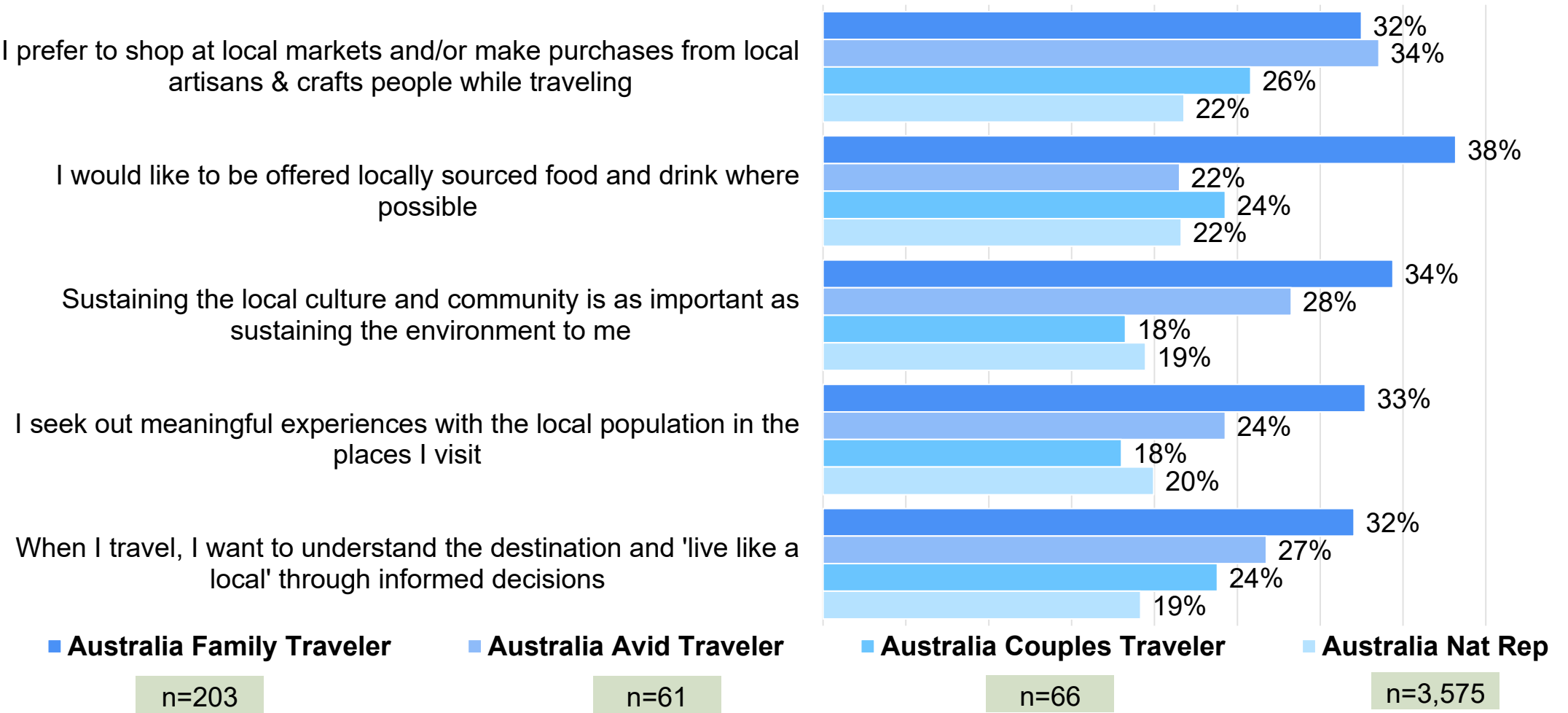
Australia - Sustainability and Travel Responsibility Statements

Agreement Regarding Sustainable Practices While Traveling (Strongly Agree)



Australia - Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling (Strongly Agree)



Australia Family Travelers: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustainable Practices While Traveling

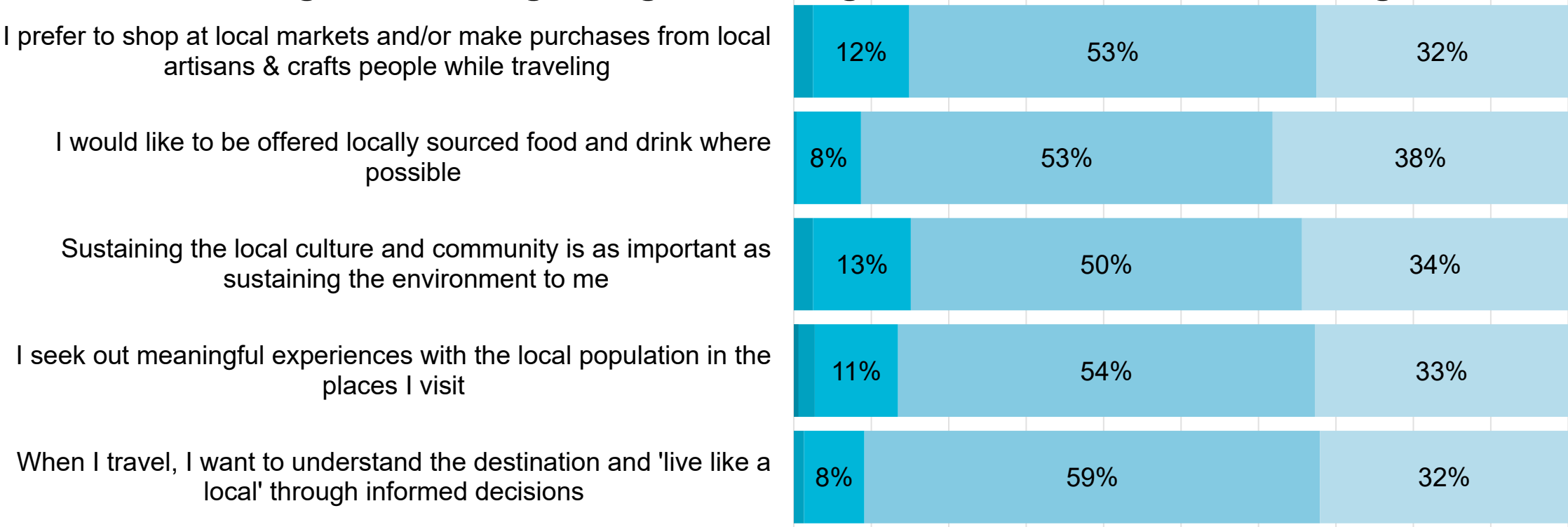


■ Strongly disagree ■ Disagree ■ Neither agree nor disagree ■ Agree ■ Strongly agree

Sample Size: n=203

Australia Family Travelers: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling

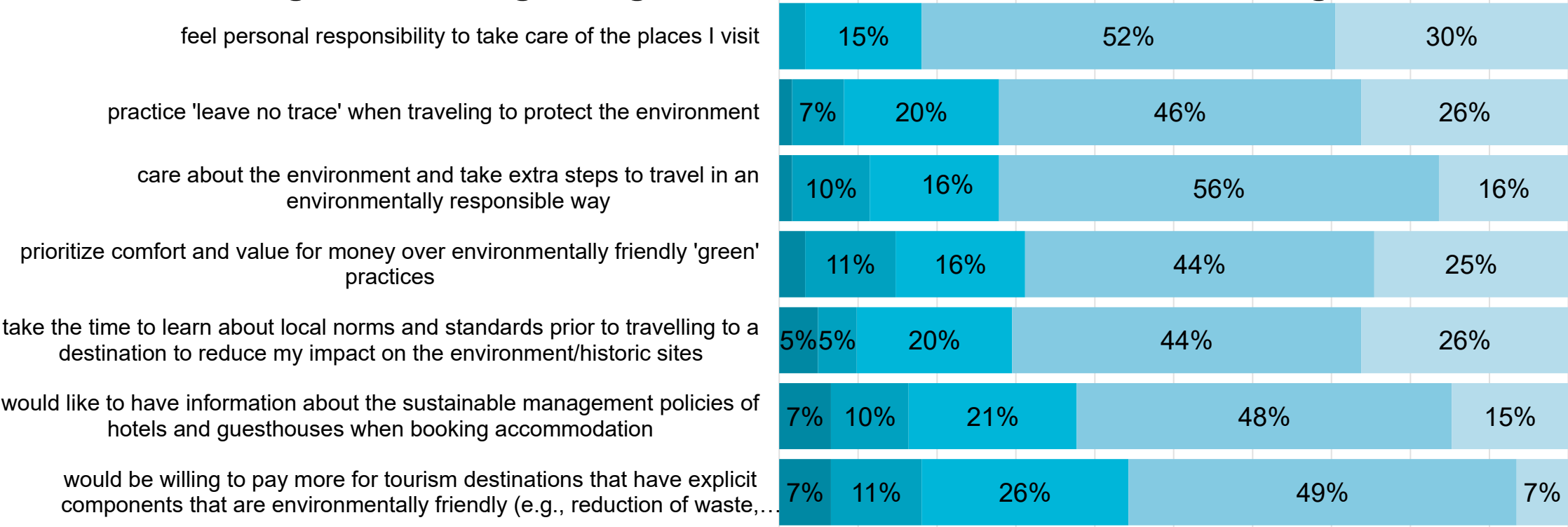


■ Strongly disagree ■ Disagree ■ Neither agree nor disagree ■ Agree ■ Strongly agree

Sample Size: n=203

Australia Avid Travelers: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustainable Practices While Traveling

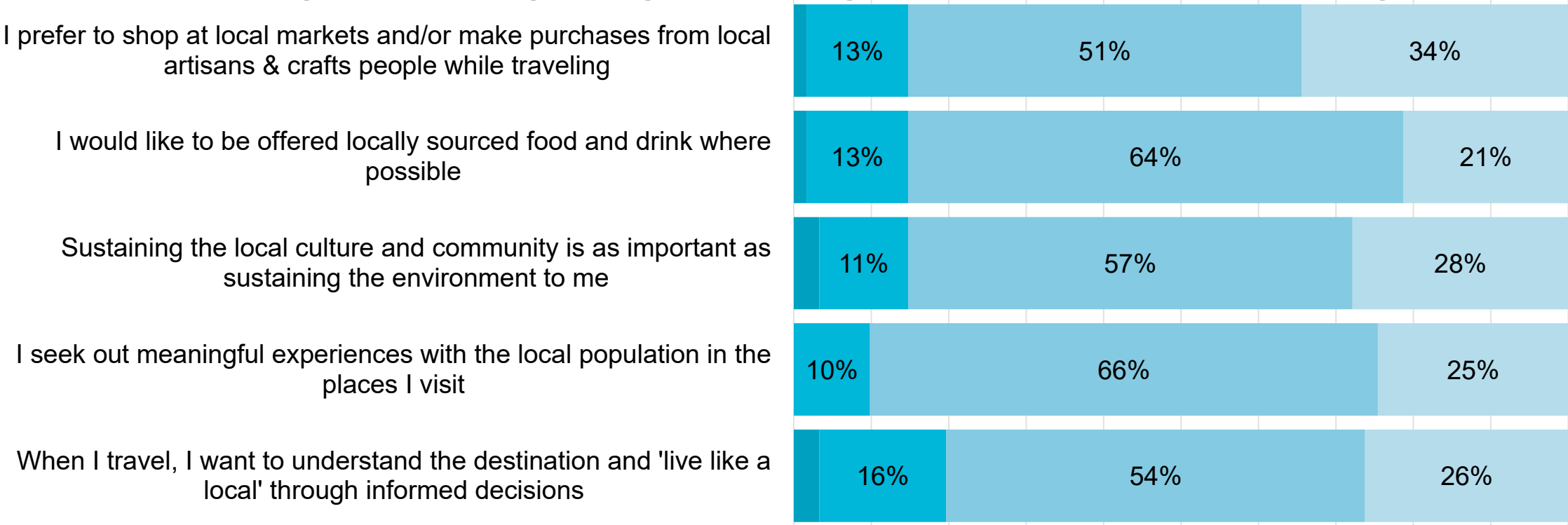


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Agreement Regarding Sustaining Local Culture While Traveling

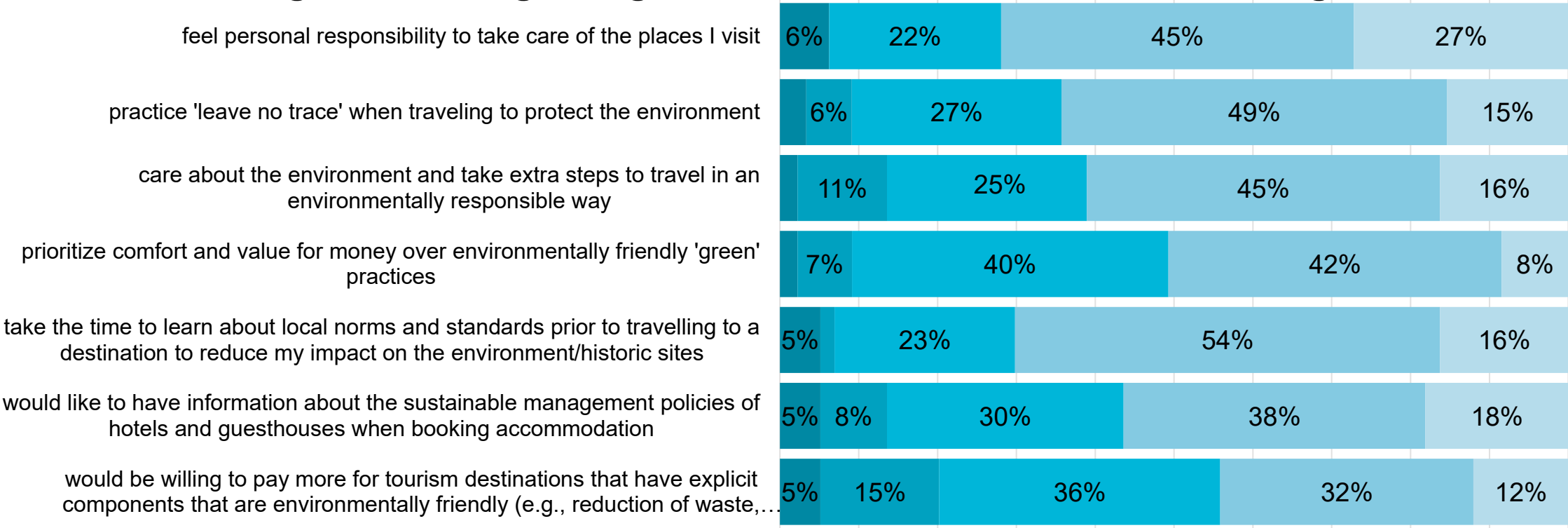


■ Strongly disagree ■ Disagree ■ Neither agree nor disagree ■ Agree ■ Strongly agree

Sample Size: n=61

Australia Couples Travelers: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustainable Practices While Traveling

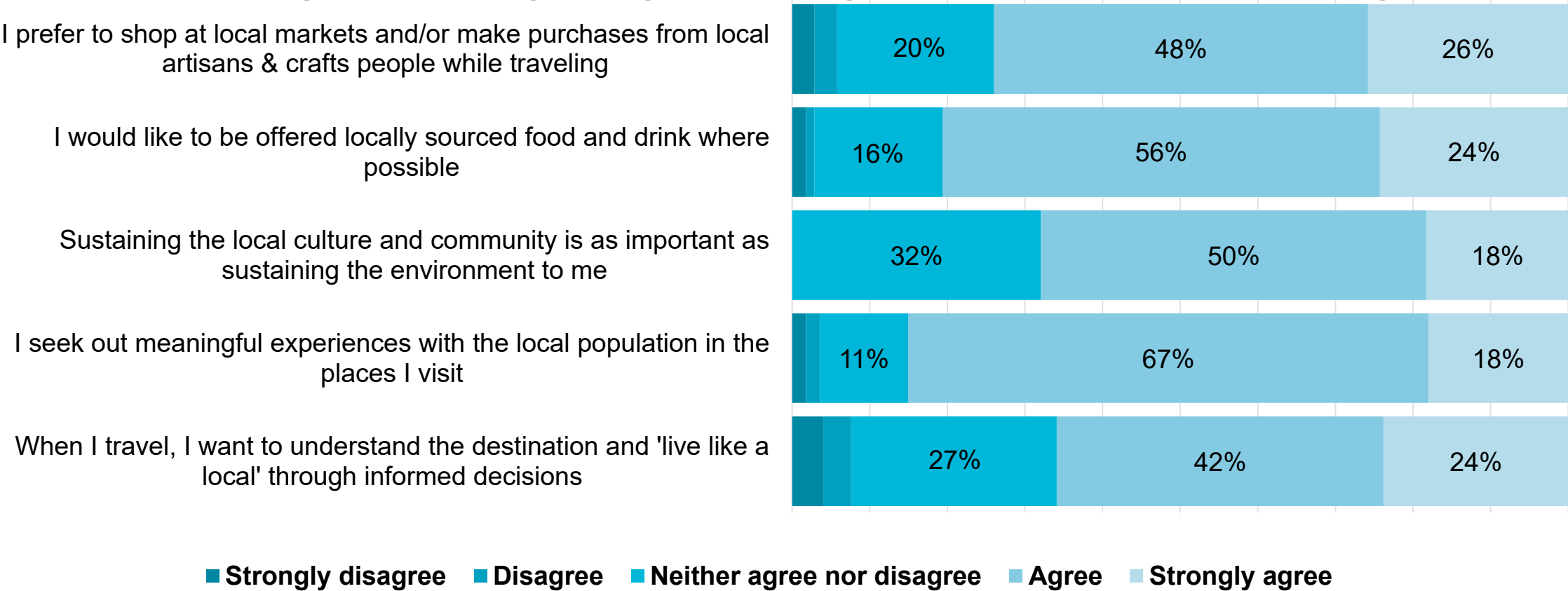


■ Strongly disagree ■ Disagree ■ Neither agree nor disagree ■ Agree ■ Strongly agree

Sample Size: n=66

Australia Couples Travelers: Sustainability and Travel Responsibility Statements

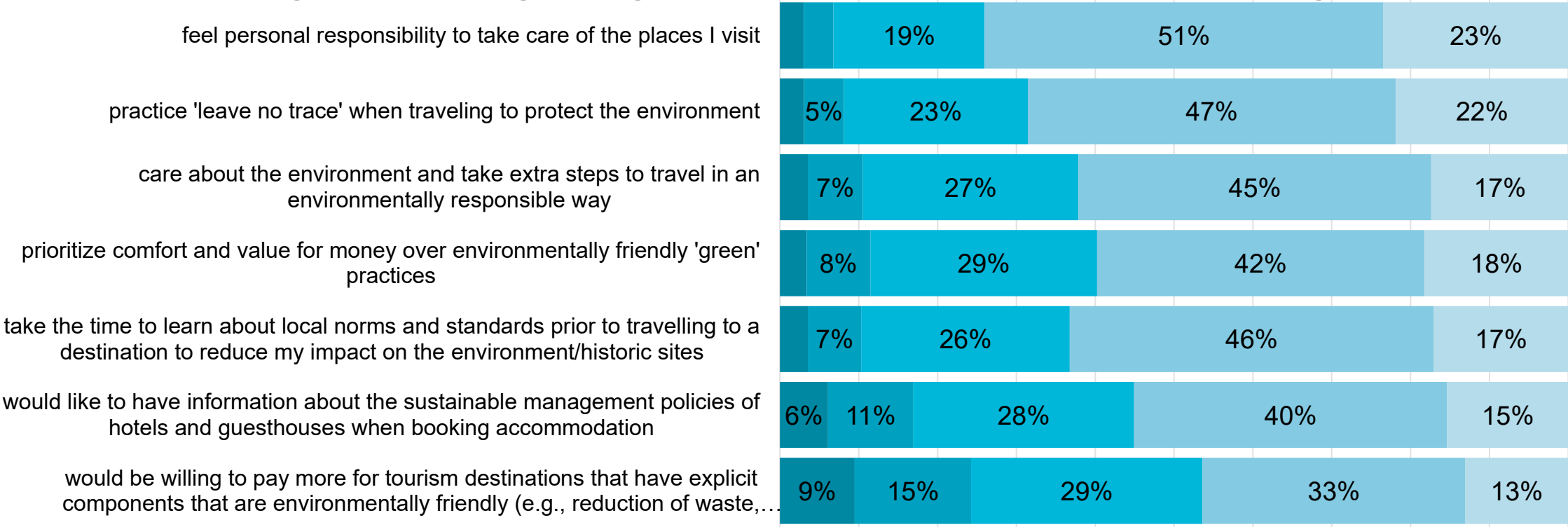
Agreement Regarding Sustaining Local Culture While Traveling



Sample Size: n=66

Australia Nat Rep: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustainable Practices While Traveling

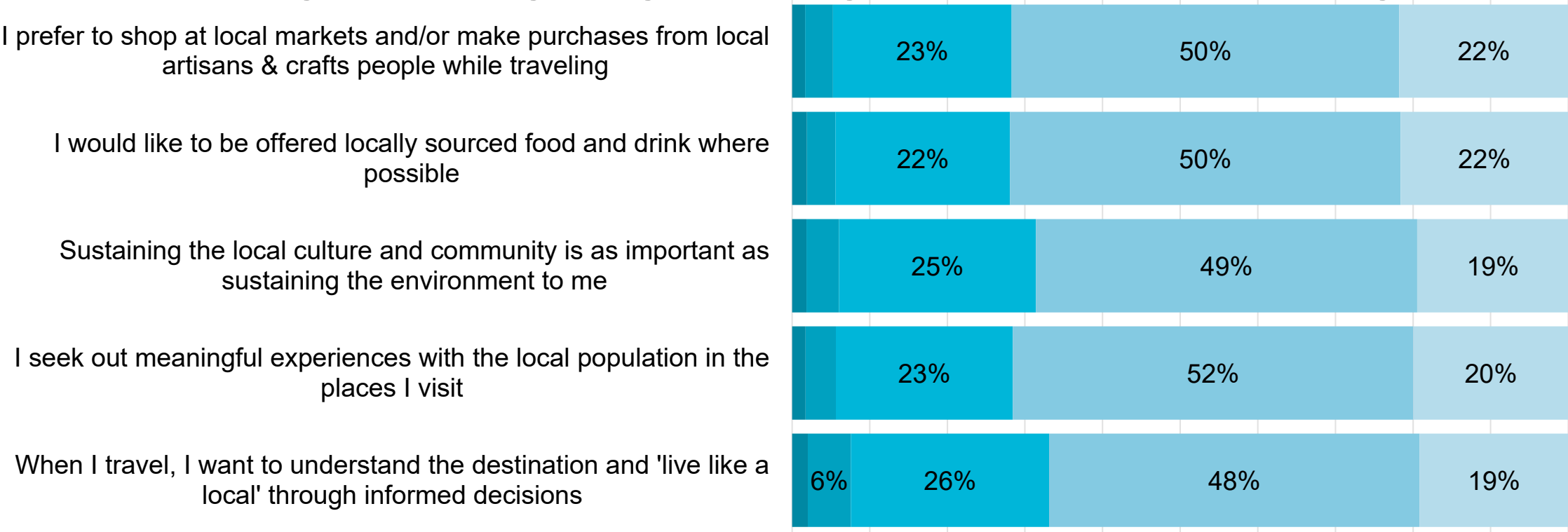


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Sample Size: n=3,575

Australia Nat Rep: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling

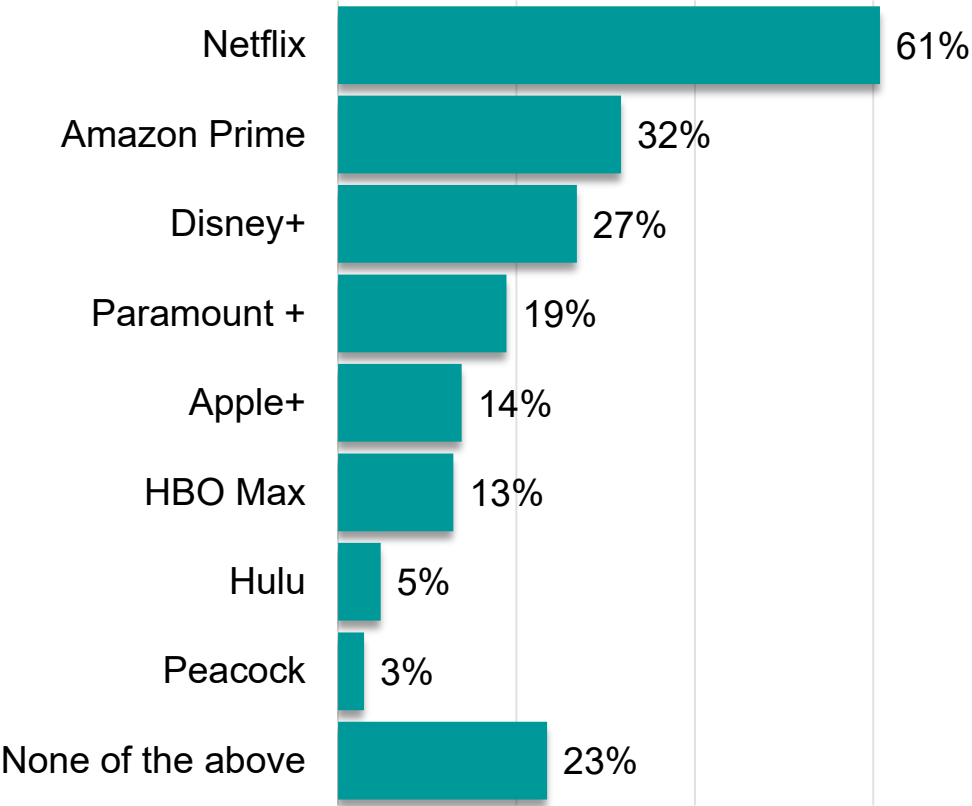


■ Strongly disagree ■ Disagree ■ Neither agree nor disagree ■ Agree ■ Strongly agree

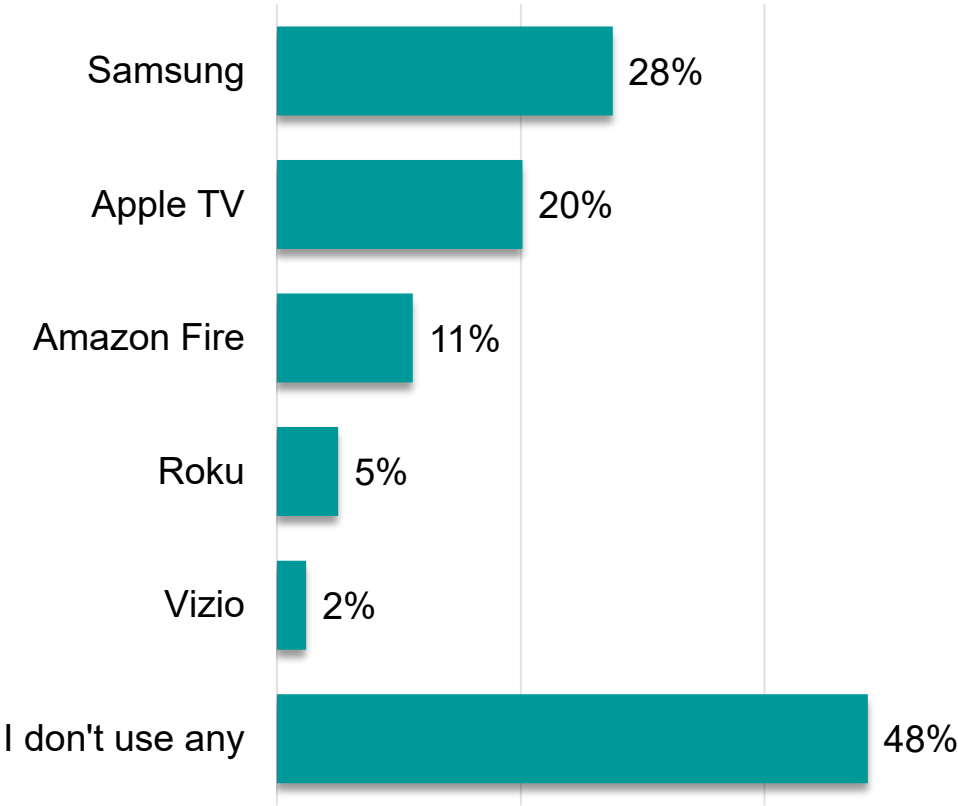
Sample Size: n=3,575

Australia Media Consumption

Streaming Platforms Used Weekly



Connected Device Used

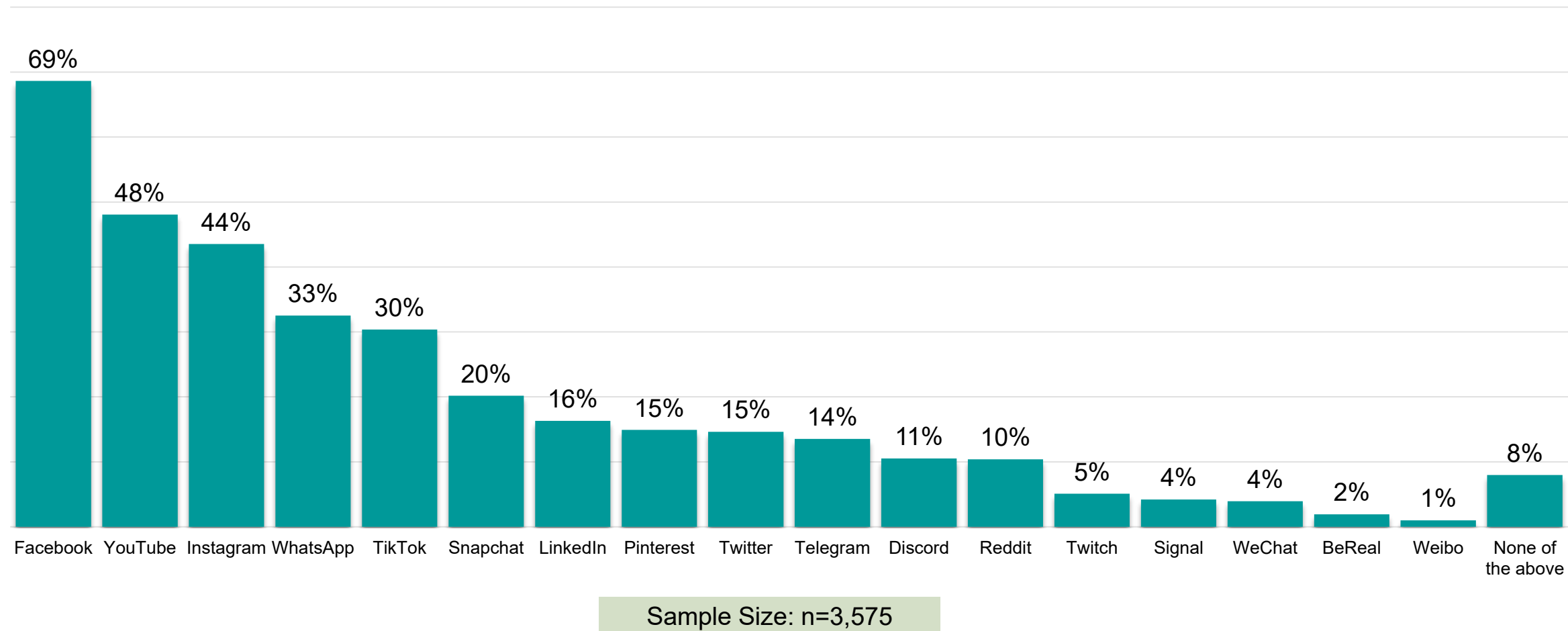


Sample Size: n=3,575

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**

Australia 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**

Australia Media Consumption

Travel Destination Source of Awareness

TV Program/Documentary	27%
Online	31%
Radio	12%
TV commercials	27%
Newspaper	15%
Friends/Family	41%
Social Media	36%
YouTube	33%
Out of Home Advertising (e.g., poster billboards, bus shelter advertisements, etc.)	8%
Email	17%
I don't recall	12%

Actions Taken After Seeing an Ad for a Destination

I go to the destination's website	25%
I search for information about the destination online	39%
I look up the destination on social media	21%
I talk to friends/family about the destination	28%
I book travel to the destination almost immediately	9%
I don't do anything	18%
None of the above	9%

Sample Size: n=3,575