

# YouGov Destination Index Trends Responsible Travelers Segment

September 19, 2022



# YouGov Syndicated Survey

- HTA subscribes to YouGov's Brand Index and Profiles databases for the U.S., Japan, and Canada
- YouGov has a global consumer panel with over 11 million participants in 55 countries who take over 20 million surveys each year
- 10,000 consumers are surveyed each day
- HTA receives access to new data each week
- YouGov has daily brand tracking metrics – media-focused, brand health, purchase/intent, consumer status
- Responsible Traveler Segment
  - Respondents who self-identify as responsible travelers (i.e., wellness focused, environmental impact, culturally minded)

# Destination Index

- Metrics

- Buzz

- Net % of people that heard something positive about the brand in past two weeks minus % of people heard something negative about brand in past two weeks

- Recommend

- Net % would recommend to others minus % would tell to avoid

- Word of Mouth Exposure

- Yes% talked with someone about the brand (in-person, online or through social media)

- Consideration

- Yes% would consider purchasing a brand when next in market

- Purchase Intent

- Yes % most likely to visit the brand in question, of all brands considered

# 2020 Significant Dates

**March 26, 2020**  
– mandated 14-day quarantine for all travelers coming to Hawai'i goes into effect at 12:01 a.m.

**June 24, 2020** – Gov. Ige announces pre-travel testing program to avoid the mandatory quarantine starting Aug. 1<sup>st</sup>

**November 28-26, 2020**– Hurricane Douglas passes close to the Hawaiian Islands

**August 6, 2020** – announcement that interisland travel quarantine will be reinstated starting Aug. 11<sup>th</sup>

**September 16, 2020** – pre-travel testing program launch pushed to Oct. 15<sup>th</sup>

**November 24, 2020** – Kaua'i County announces they will opt out of Safe Travels program starting Dec. 2<sup>nd</sup>

**September 16, 2020** – 14-day quarantine requirement for interisland travelers lifted

**July 13, 2020** – pre-travel testing program launch pushed back to Sept. 1<sup>st</sup>

**July 27, 2020** – Gov. Ige announces Hawai'i is being considered by Japan for resumption of international travel

**November 28, 2020** – pre-travel testing program launch pushed back to Oct. 1<sup>st</sup>, at the earliest

**October 15, 2020** – pre-travel testing program officially begins

# 2021 Significant Dates

**January 12, 2021** – CDC recommends all international arrivals over the age of two get tested within three days before returning to the U.S.

**January 26, 2021** – new CDC regulation goes into effect. All international arrivals (2+ years of age) to the U.S. must have a negative COVID-19 test within three days of departure to avoid a 10-day quarantine

**June 4, 2021** – Gov. Ige announces that starting June 15, all restrictions for inter-county travel will be lifted and travelers entering the state who have been vaccinated in Hawai'i may bypass quarantine without a pre-travel test.

**August 23, 2021** – Gov. Ige announces "Now's not a good time to visit Hawai'i."

**November 8, 2021** – non-citizen, non-immigrant air travelers to the United States will be required to be fully vaccinated and to provide proof of vaccination status prior to boarding an airplane to fly to the U.S.

**January 20, 2021** – all arriving passengers to Maui County must upload the *AlohaSafe* COVID-19 exposure app to their cell phones

**March 3, 2021** – Gov. Ige approves Kaua'i's re-entry into Safe Travels for Trans-Pacific travelers beginning April 5

**June 24, 2021** – Gov. Ige announces that individuals vaccinated in the U.S. will be able to bypass the testing/quarantine requirement with proof of vaccination through the state's Safe Travels program

**October 19, 2021** – Gov. Ige announced "Beginning November 29, we want to invite and encourage fully vaccinated visitors or residents to travel transpacific or inter-island"

# 2022 Significant Dates

**March 1, 2022** –  
Governor Ige  
announces  
Safe Travels  
Program  
ends on  
March 25,  
2022

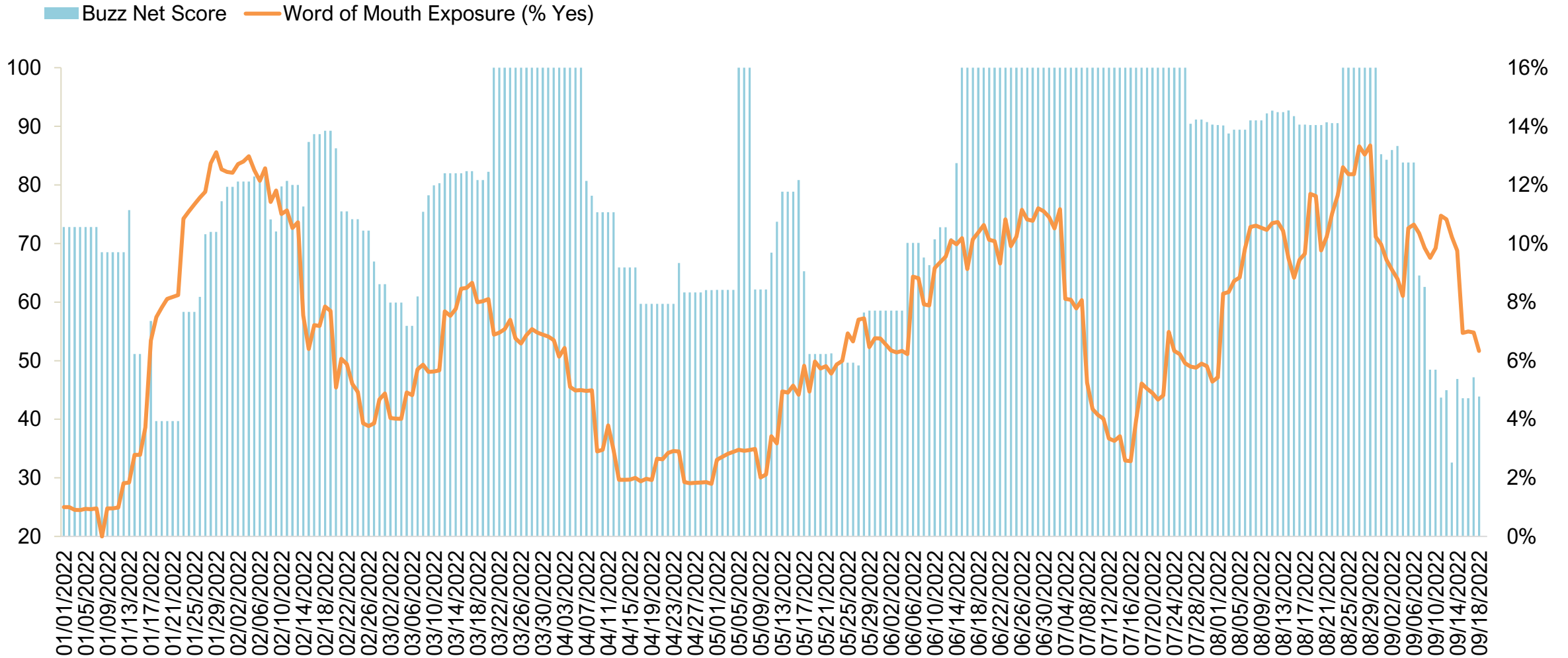


**June 10, 2022** –  
Biden administration  
announced the lifting  
of the pre-departure  
testing requirement  
for inbound air  
travelers to the U.S  
on June 12, 2022

# U.S. Destination Index Trends Responsible Travelers Segment O'ahu



# O'ahu – Buzz Net Score and Word of Mouth Exposure (% Yes) U.S. Four-Week Moving Average

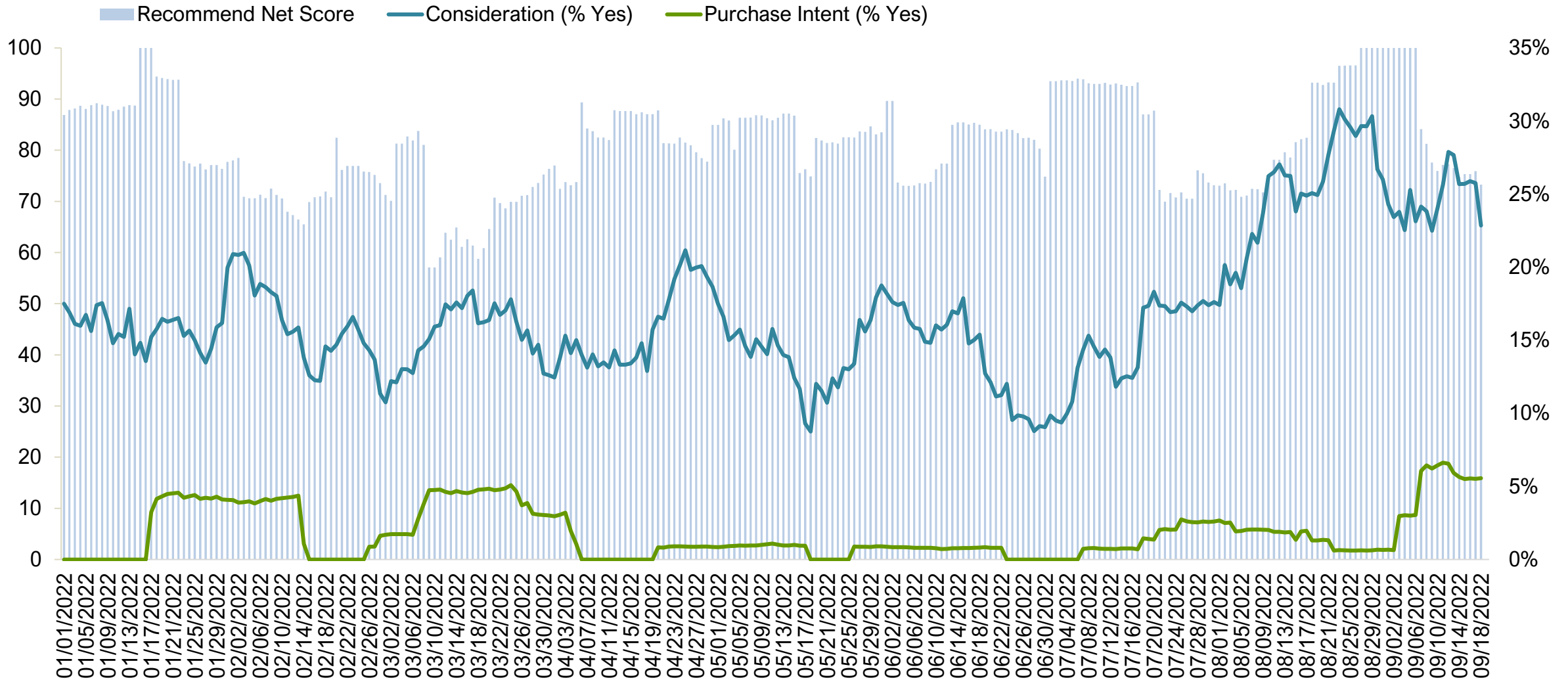


**Buzz Question:** (Net) Over the PAST TWO WEEKS, which of the following destinations have you heard something POSITIVE about (whether in the news, through advertising, or talking to friends and family)? / Now which of the following have you heard something NEGATIVE about over the PAST TWO WEEKS?

**Word of Mouth Exposure Question:** (Net) Which of the following destinations have you talked about with friends and family in the PAST TWO WEEKS (whether in-person, online, or through social media?)



# O'ahu – Recommend Net Score, Consideration (% Yes), Purchase Intent (% Yes) U.S. Four-Week Moving Average

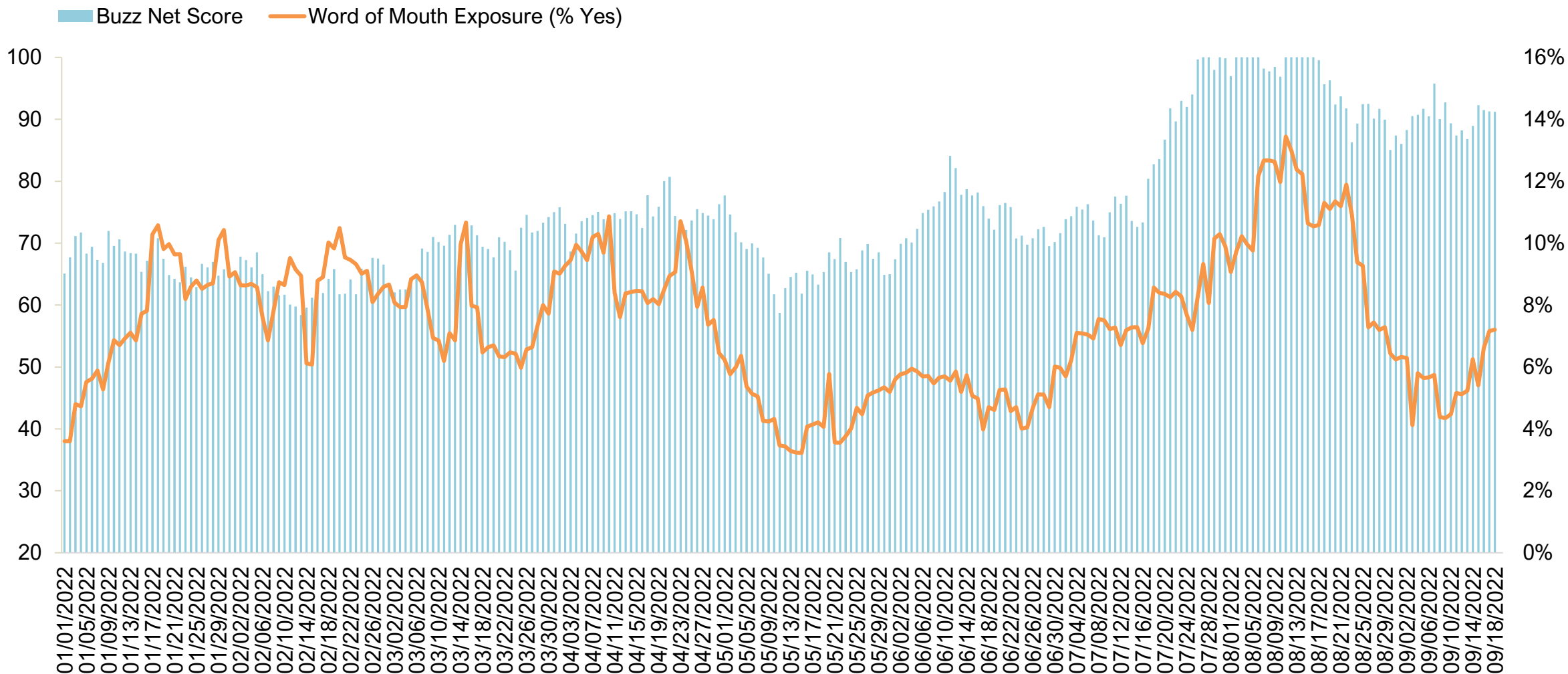


**Recommend Question:** (Net) Which of the following destinations would you RECOMMEND to a friend or colleague? / And which of the following destinations would you tell a friend or colleague to AVOID?  
**Consideration Question:** (Net) Thinking about your next vacation by air alone or with friends, family, a partner or spouse, which of the following destinations would you consider?  
**Purchase Intent Question:** (Net) Of the destinations considered, which are you most likely to visit?

# U.S. Destination Index Trends Responsible Travelers Segment Maui



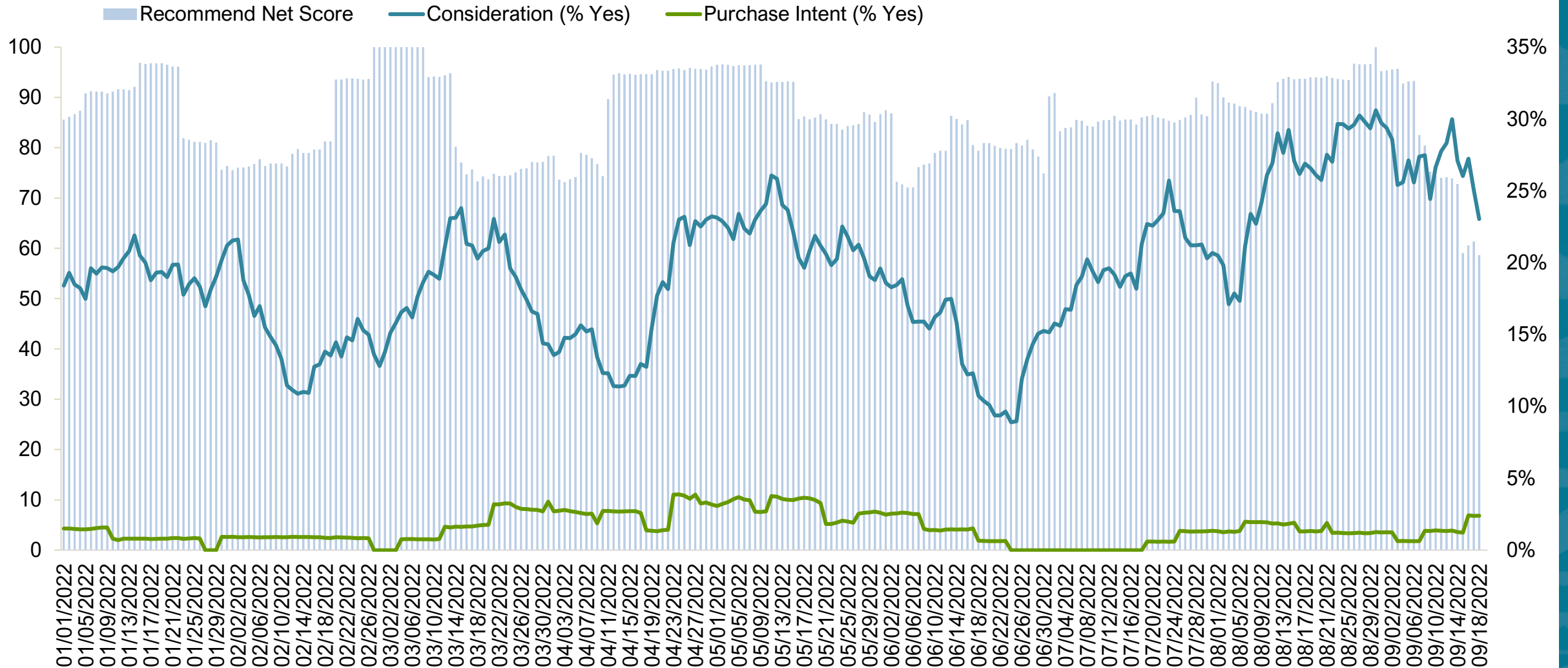
# Maui – Buzz Net Score and Word of Mouth Exposure (% Yes) U.S. Four-Week Moving Average



**Buzz Question:** (Net) Over the PAST TWO WEEKS, which of the following destinations have you heard something POSITIVE about (whether in the news, through advertising, or talking to friends and family)? / Now which of the following have you heard something NEGATIVE about over the PAST TWO WEEKS?

**Word of Mouth Exposure Question:** (Net) Which of the following destinations have you talked about with friends and family in the PAST TWO WEEKS (whether in-person, online, or through social media?)

# Maui – Recommend Net Score, Consideration (% Yes), Purchase Intent (% Yes) U.S. Four-Week Moving Average

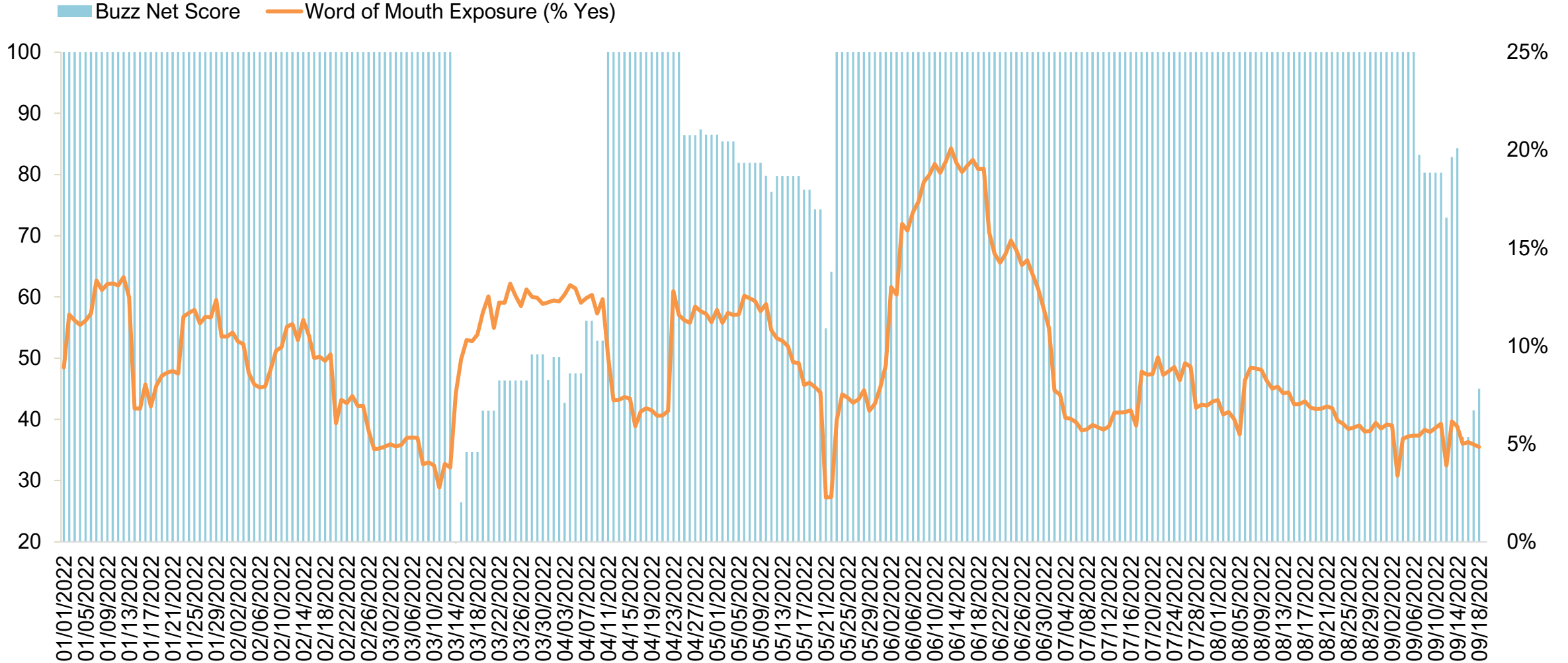


**Recommend Question:** (Net) Which of the following destinations would you RECOMMEND to a friend or colleague? / And which of the following destinations would you tell a friend or colleague to AVOID?  
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# U.S. Destination Index Trends Responsible Travelers Segment Kaua'i



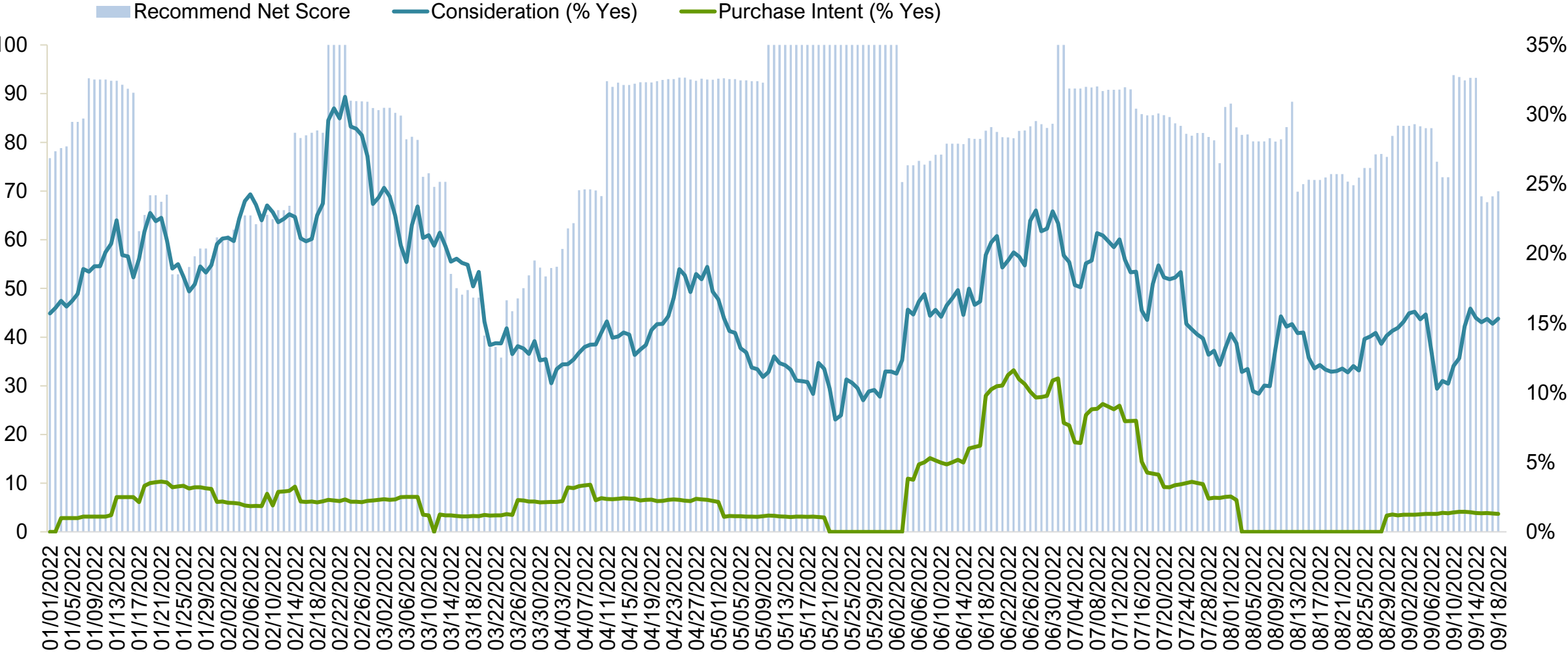
# Kaua'i – Buzz Net Score and Word of Mouth Exposure (% Yes) U.S. Four-Week Moving Average



**Buzz Question:** (Net) Over the PAST TWO WEEKS, which of the following destinations have you heard something POSITIVE about (whether in the news, through advertising, or talking to friends and family)? / Now which of the following have you heard something NEGATIVE about over the PAST TWO WEEKS?

**Word of Mouth Exposure Question:** (Net) Which of the following destinations have you talked about with friends and family in the PAST TWO WEEKS (whether in-person, online, or through social media?)

# Kaua'i – Recommend Net Score, Consideration (% Yes), Purchase Intent (% Yes) U.S. Four-Week Moving Average



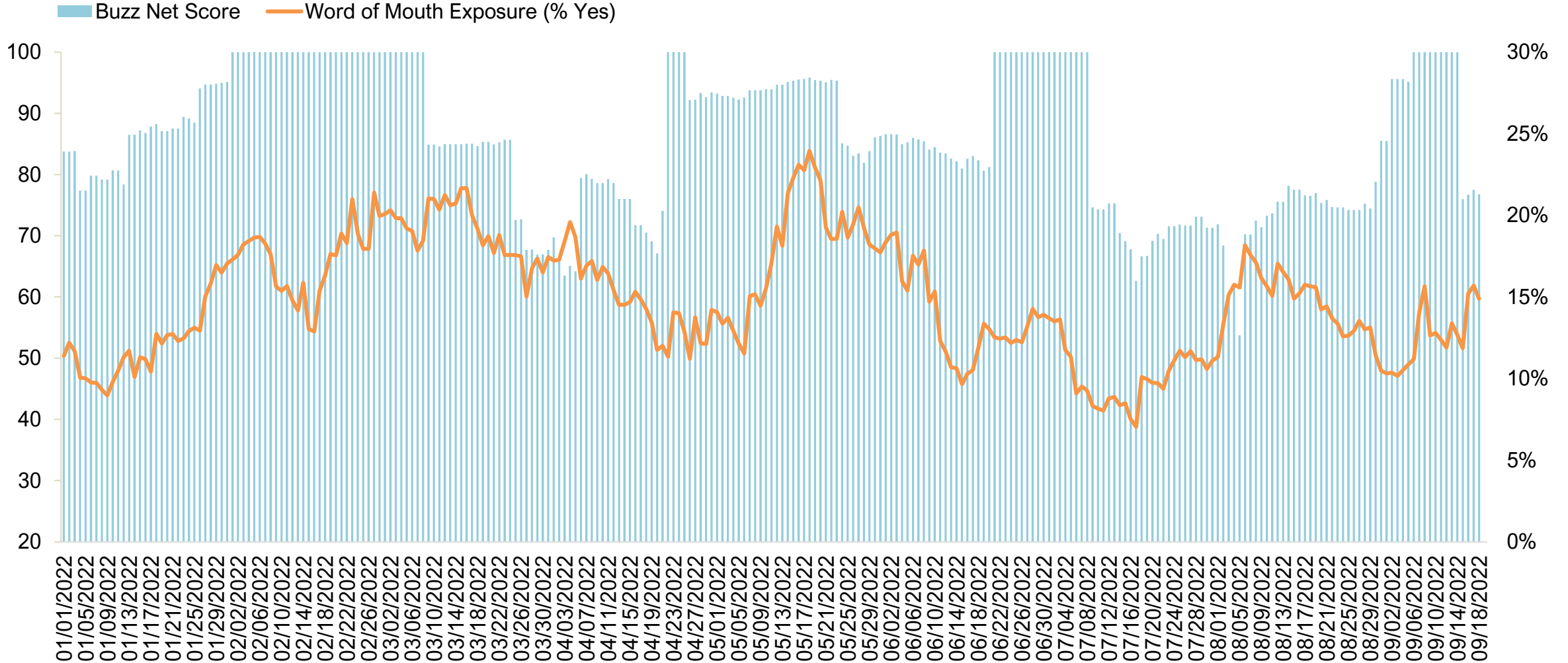
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# U.S. Destination Index Trends Responsible Travelers Segment Island of Hawai'i





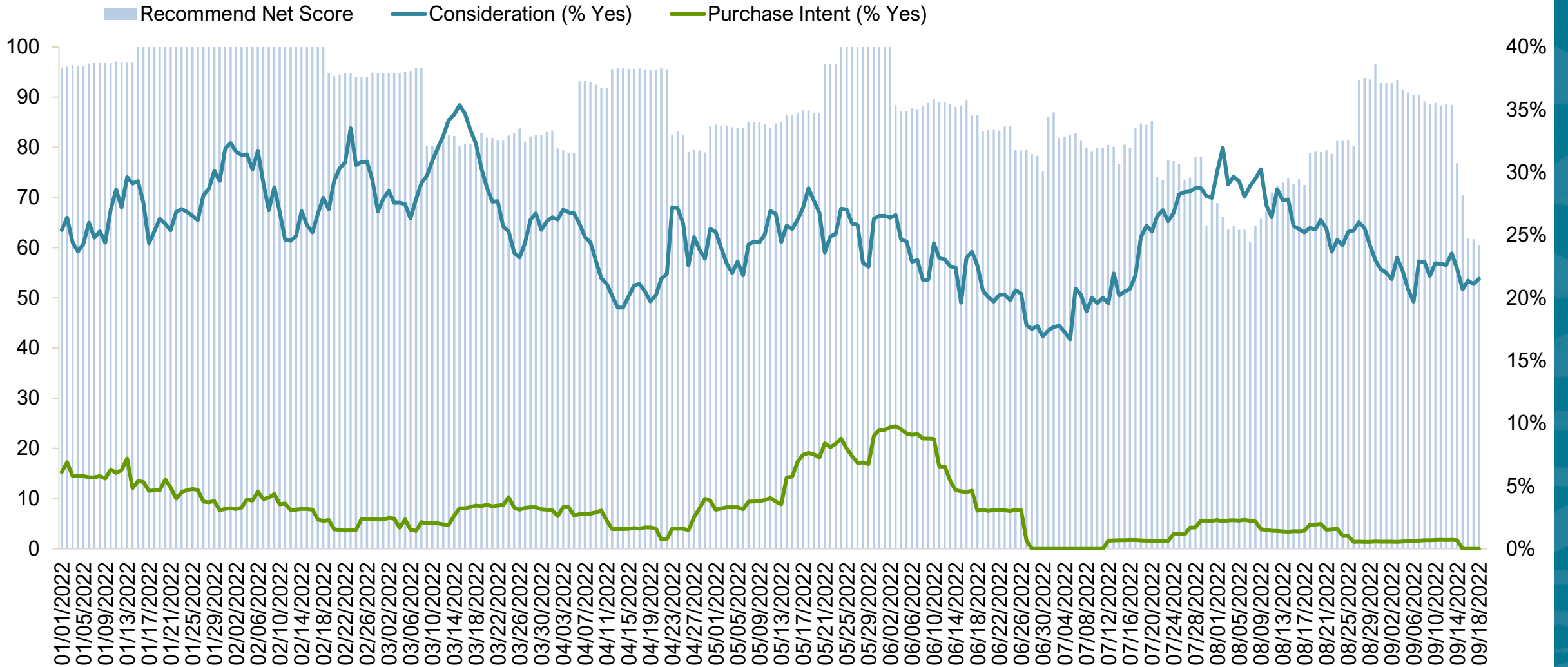
# Island of Hawai'i – Buzz Net Score and Word of Mouth Exposure (% Yes) U.S. Four-Week Moving Average



**Buzz Question:** (Net) Over the PAST TWO WEEKS, which of the following destinations have you heard something POSITIVE about (whether in the news, through advertising, or talking to friends and family)? / Now which of the following have you heard something NEGATIVE about over the PAST TWO WEEKS?

**Word of Mouth Exposure Question:** (Net) Which of the following destinations have you talked about with friends and family in the PAST TWO WEEKS (whether in-person, online, or through social media?)

# Island of Hawai'i – Recommend Net Score, Consideration (% Yes), Purchase Intent (% Yes) U.S. Four-Week Moving Average



**Recommend Question:** (Net) Which of the following destinations would you RECOMMEND to a friend or colleague? / And which of the following destinations would you tell a friend or colleague to AVOID?  
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