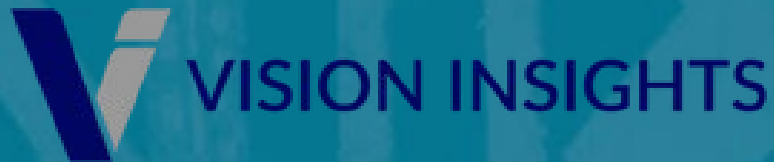




STATE OF HAWAII • DEPARTMENT OF BUSINESS,
ECONOMIC DEVELOPMENT & TOURISM

Vision Insights Responsible Travelers Segment Australia

May 14, 2024



Vision Insights Syndicated Survey

- DBEDT subscribes to Vision Insight's Responsible Travelers Segment databases for the State of Hawai'i (O'ahu, Maui, Kaua'i and Hawai'i Island)
- Consumers are surveyed each day
- DBEDT receives access to new data each week for daily responsible traveler metrics – media-focused, brand health, purchase/intent, and consumer status
- Responsible Traveler Segment
 - Respondents who self-identify as responsible travelers (i.e., wellness focused, environmental impact, culturally minded)

Vision Insights Metrics

- **Intent to Travel:** Percentage of people who intend to travel to a destination in the last two weeks
- **Chatter (Net):** Net percentage of people who heard something positive about a destination and people who heard something negative about a destination in the last two weeks
- **Personal Discussion:** Percentage of people who have discussed the destination with friends and family in the past two weeks
- **Recommendation:** Percentage of people who are very likely to recommend the destination to a family, friend, or colleague
- **Consideration:** Percentage of people who are “Likely” to “Very Likely to Consider” a destination for their next vacation (Top 3 box of 8-point scale)
- **Favorability:** Percentage of people who rated a destination as “Favorable” or “Very Favorable” (Top 2 box of a 5-point scale)

Destinations

- Respondents are asked about:
 - State of Hawai‘i
 - O‘ahu
 - Maui
 - Kaua‘i
 - Hawai‘i Island
- Intent to travel metric focuses on state-level indicating respondents’ interest in traveling to any Hawaiian Island
- Selecting a Hawaiian island indicates respondents’ chatter/personal discussion/recommendation/consideration/favorability for that specific Hawaiian island’s brand (the concept of a beautiful place called “Hawai‘i”) and lack of familiarity with individual islands

2023 Significant Dates

July 31, 2023 –
Tropical
Depression Five-
E begins to be
tracked by the
National
Hurricane Center
(NHC)

August 6, 2023 –
Central Pacific
Hurricane Center
forecasts
Hurricane Dora to
pass well south of
Hawai'i

August 9, 2023 –
Lieutenant
Governor Sylvia
Luke issues a
proclamation that
all nonessential
travel to the
island of Maui is
strongly
discouraged

**September 8,
2023 –**
Governor Josh
Green issues a
proclamation that
all nonessential
travel to the island
of Maui is strongly
discouraged until
October 7, 2023

**October 8,
2023 –**
Nonessential
travel to the
island of Maui
returns, along
with the phase
1 reopening of
West Maui to
visitors

June 7, 2023 –
Halema'uma'u
crater at Hawai'i
Volcanoes
National Park on
Hawai'i Island
begins to erupt
after a three
month pause

August 1, 2023 –
Tropical
Depression Five-
E strengthens to
Tropical
Storm/Hurricane
status, naming
the system Dora

August 8, 2023 –
State of
emergency is
declared for
Lahaina/Kula
(Maui) and
Kohala (Hawai'i
Island) wildfires
caused by
Hurricane Dora.
West Maui is
evacuated

**August 13,
2023 –**
Governor Josh
Green issues a
proclamation
that all
nonessential
travel to the
island of Maui is
strongly
discouraged
until August 31,
2023

**September 27,
2023 –**
Maui County
Mayor Richard
Bissen
announces a
three-phase
approach to re-
opening West
Maui to visitors
starting October
8, 2023

**November 1,
2023 –**
Phases 2 and 3
of reopening
West Maui to
visitors begins

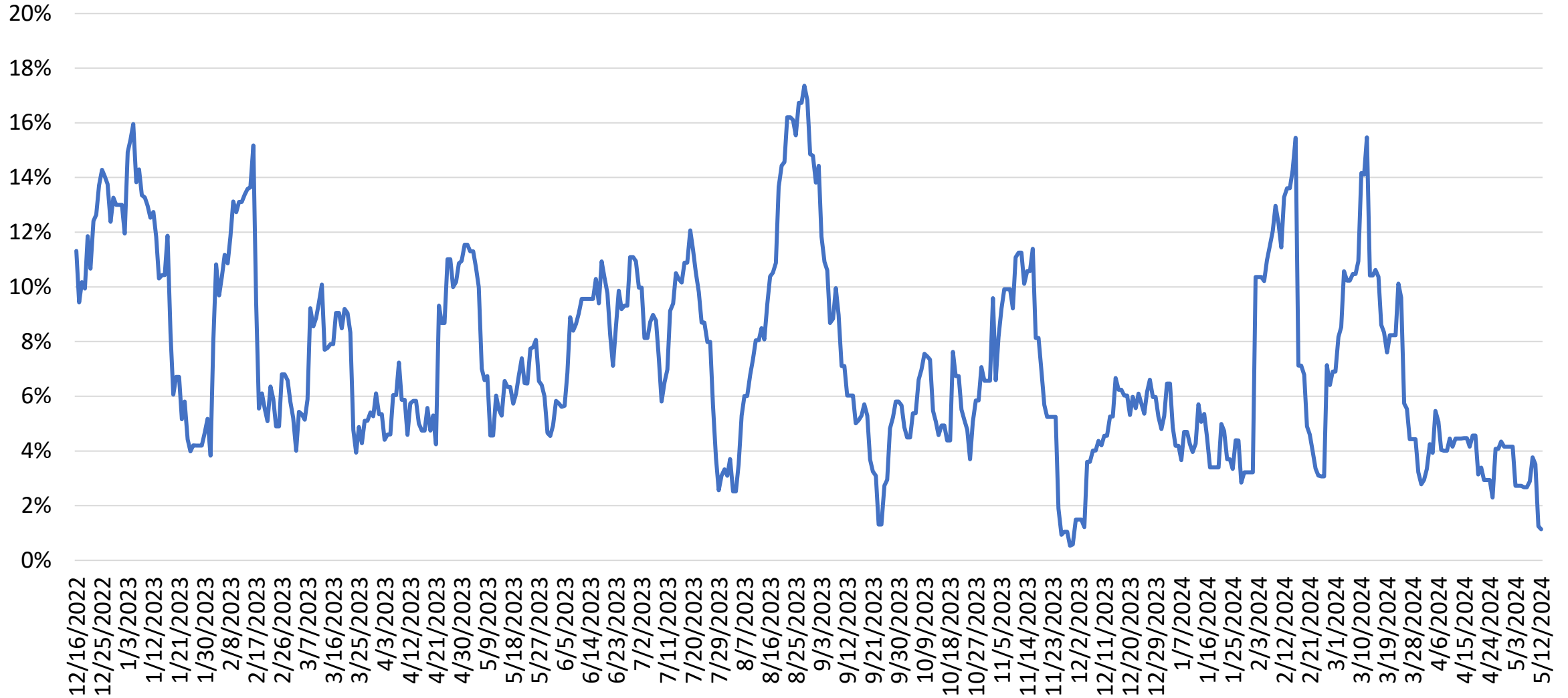


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Australia
Responsible Travelers Segment
State of Hawai'i



State of Hawai'i – Intent to Travel Australia Two-Week Moving Average

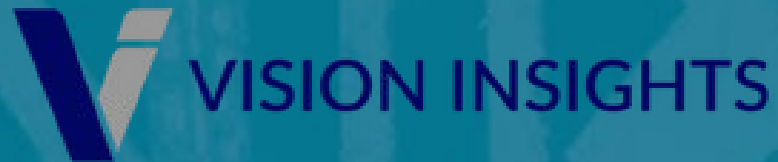


Source: Vision Insights Data as of May 14, 2024

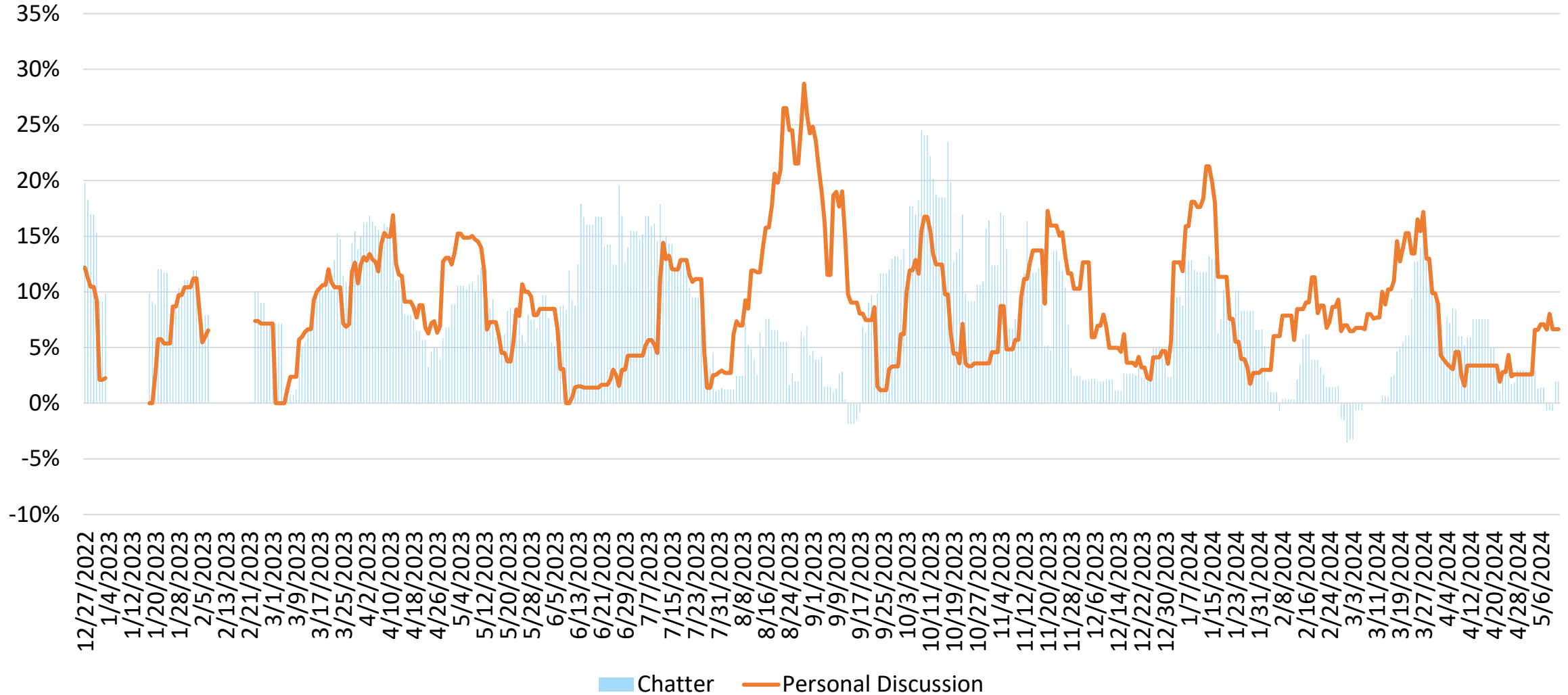


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Australia Responsible Travelers Segment O'ahu

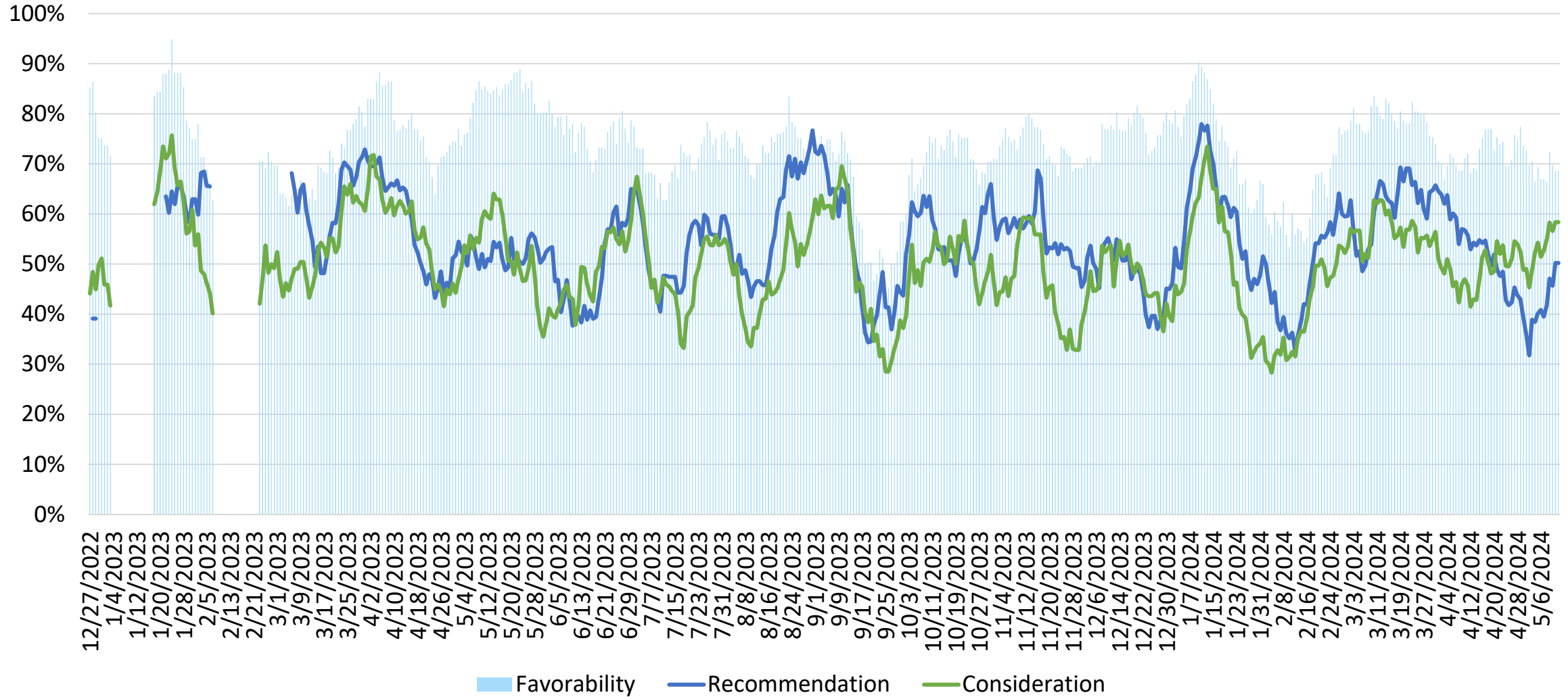


O'ahu – Chatter (Net) and Personal Discussion Australia Two-Week Moving Average



Source: Vision Insights Data as of May 14, 2024

O'ahu – Recommendation, Consideration and Favorability Australia Two-Week Moving Average



Source: Vision Insights Data as of May 14, 2024

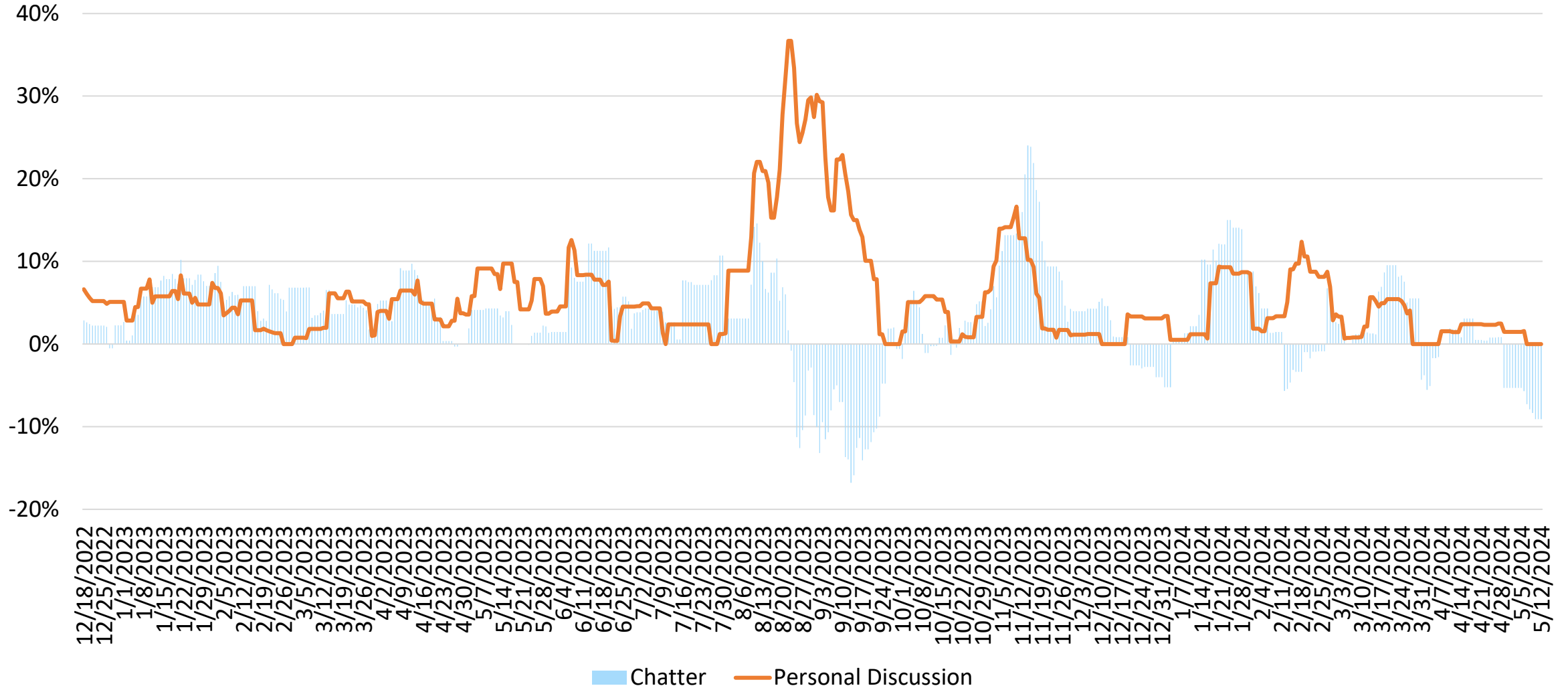


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Australia Responsible Travelers Segment Maui

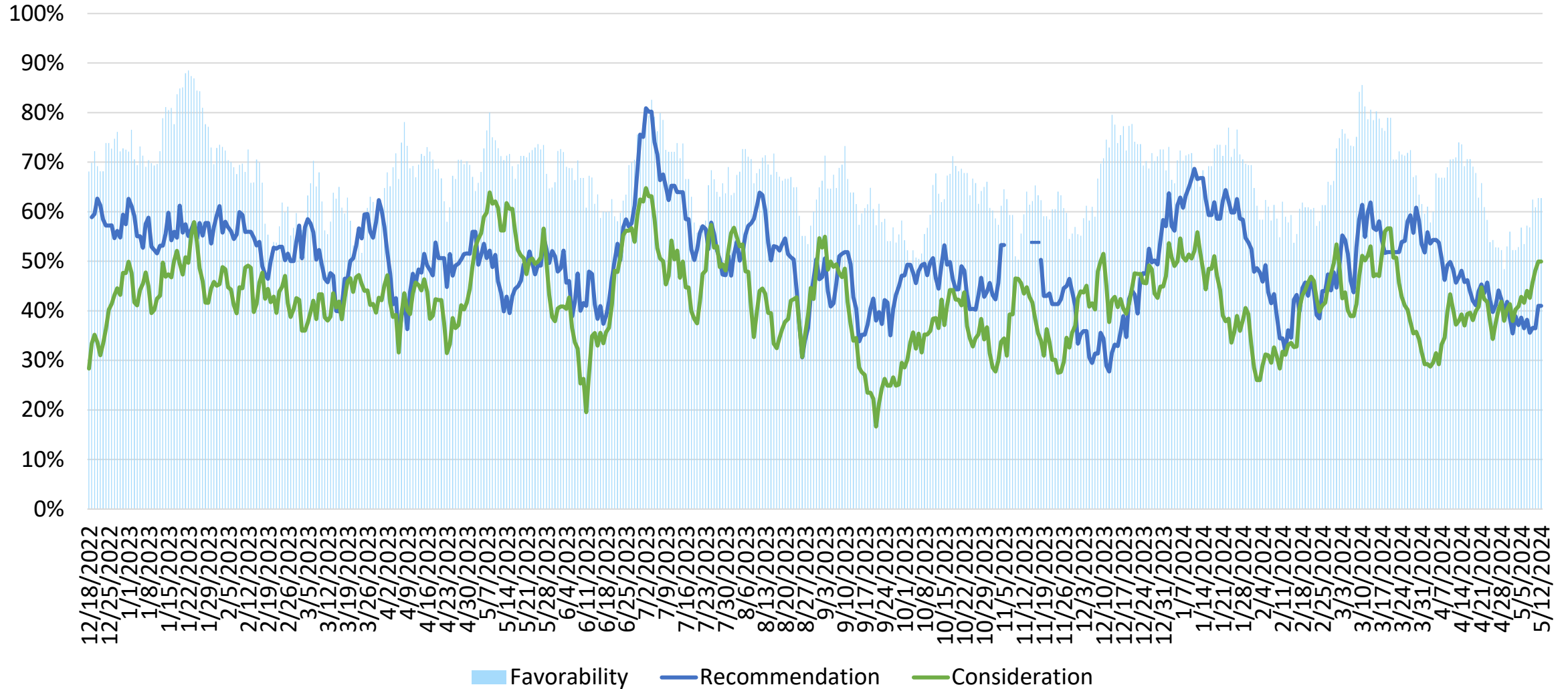


Maui – Chatter (Net) and Personal Discussion Australia Two-Week Moving Average



Source: Vision Insights Data as of May 14, 2024

Maui – Recommendation, Consideration and Favorability Australia Two-Week Moving Average



Source: Vision Insights Data as of May 14, 2024

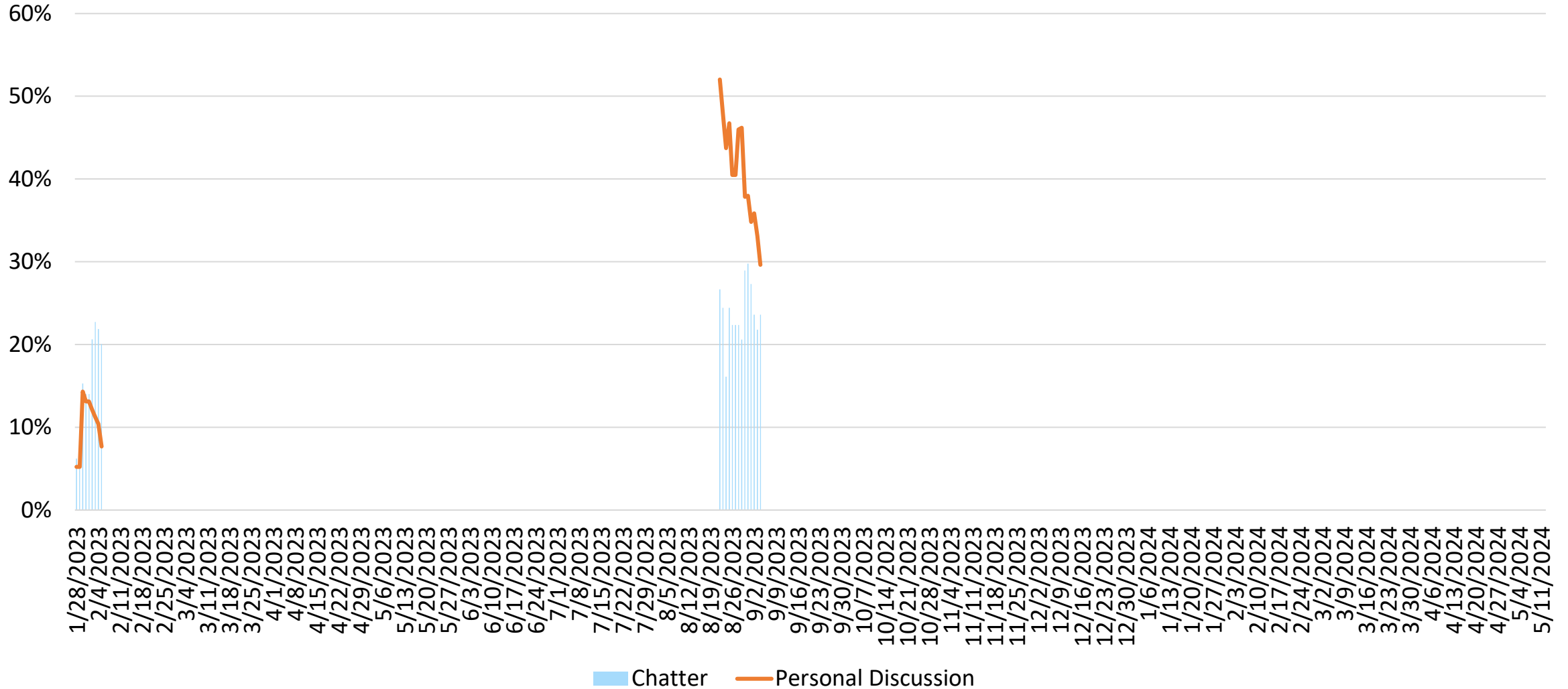


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Australia Responsible Travelers Segment Kaua'i



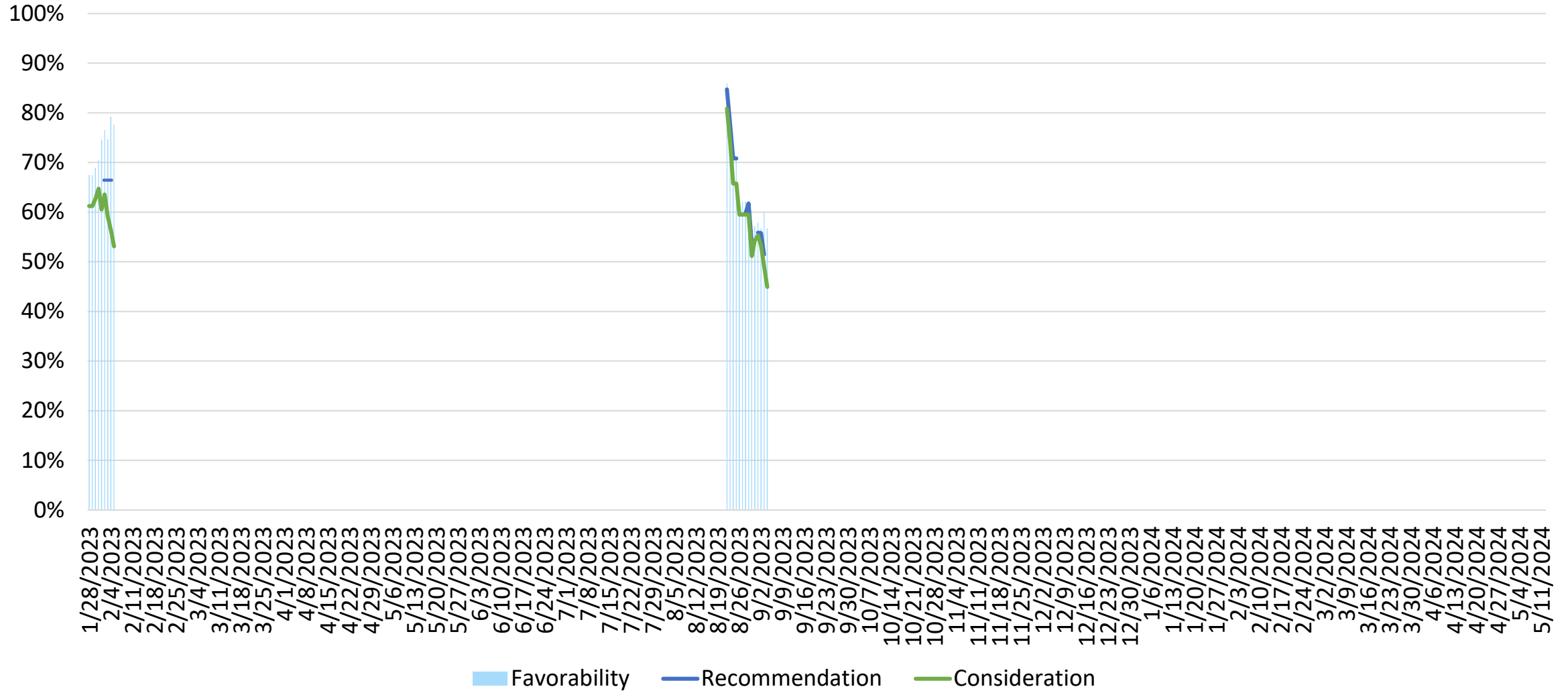
Kaua'i – Chatter (Net) and Personal Discussion Australia Two-Week Moving Average



Source: Vision Insights Data as of May 14, 2024

*Low sample size

Kaua'i – Recommendation, Consideration and Favorability Australia Two-Week Moving Average



Source: Vision Insights Data as of May 14, 2024

*Low sample size

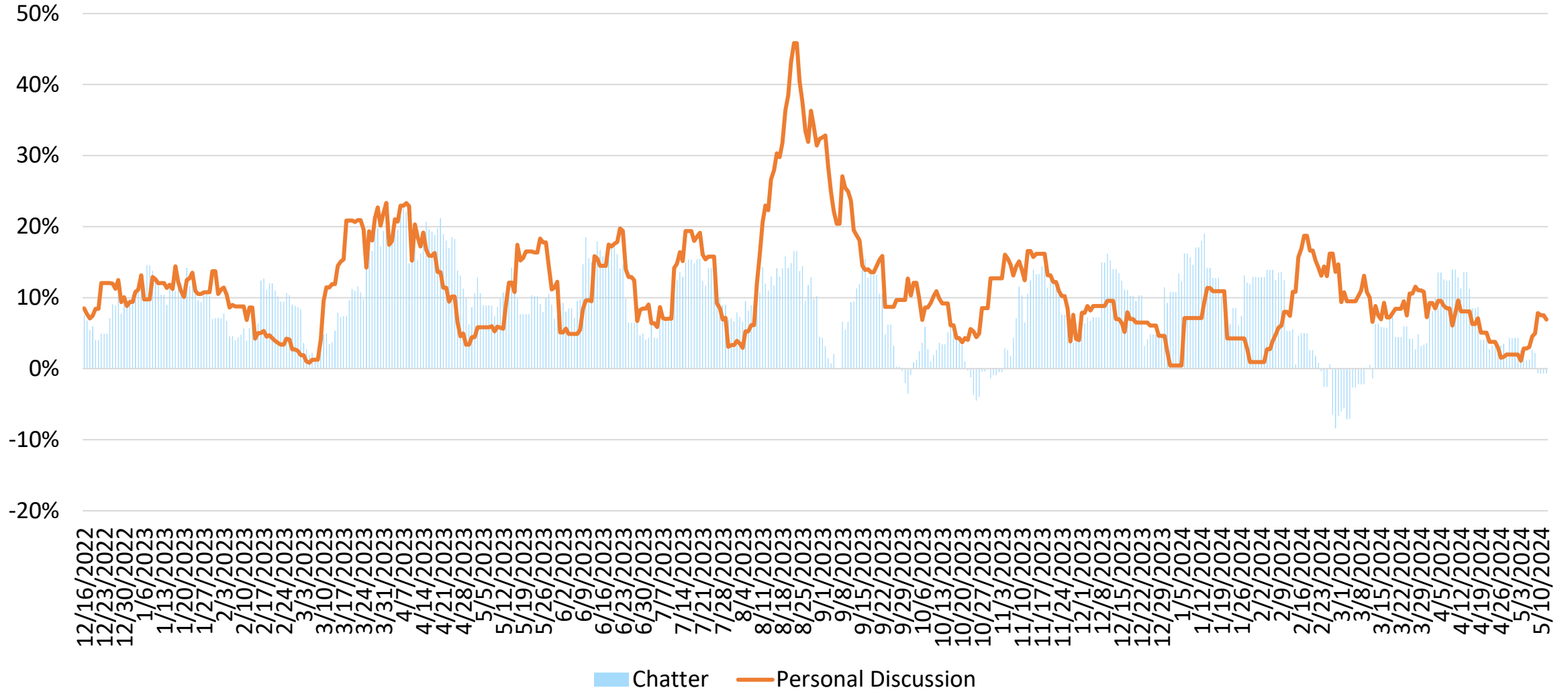


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Australia
Responsible Travelers Segment
Hawai'i Island

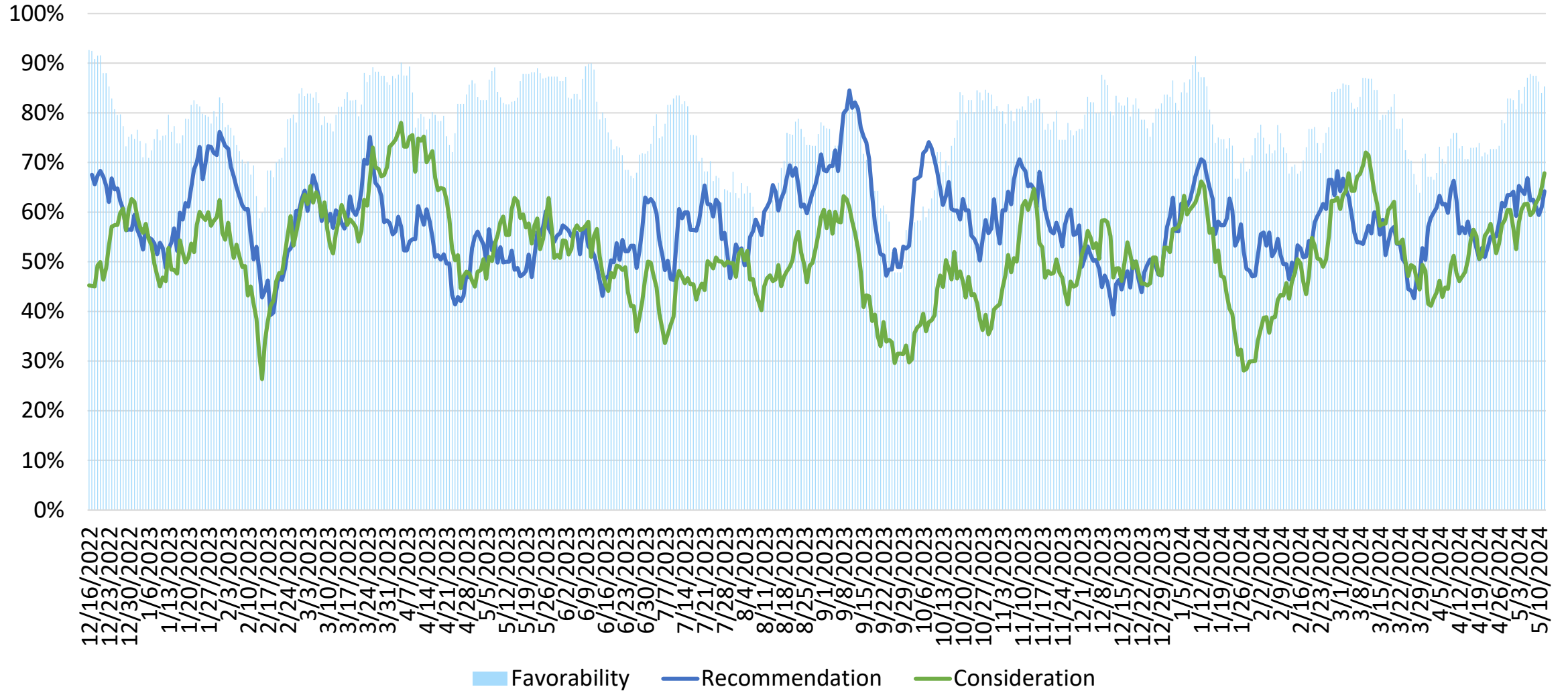


Hawai'i Island – Chatter (Net) and Personal Discussion Australia Two-Week Moving Average



Source: Vision Insights Data as of May 14, 2024

Hawai'i Island – Recommendation, Consideration and Favorability Australia Two-Week Moving Average



Source: Vision Insights Data as of May 14, 2024