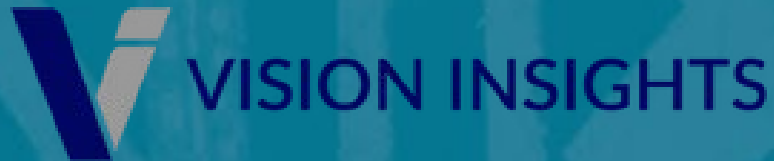




STATE OF HAWAII • DEPARTMENT OF BUSINESS,  
ECONOMIC DEVELOPMENT & TOURISM

# **Vision Insights Responsible Travelers Segment United States**

June 25, 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 week
- **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 reopening West Maui to visitors starting October 8, 2023

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

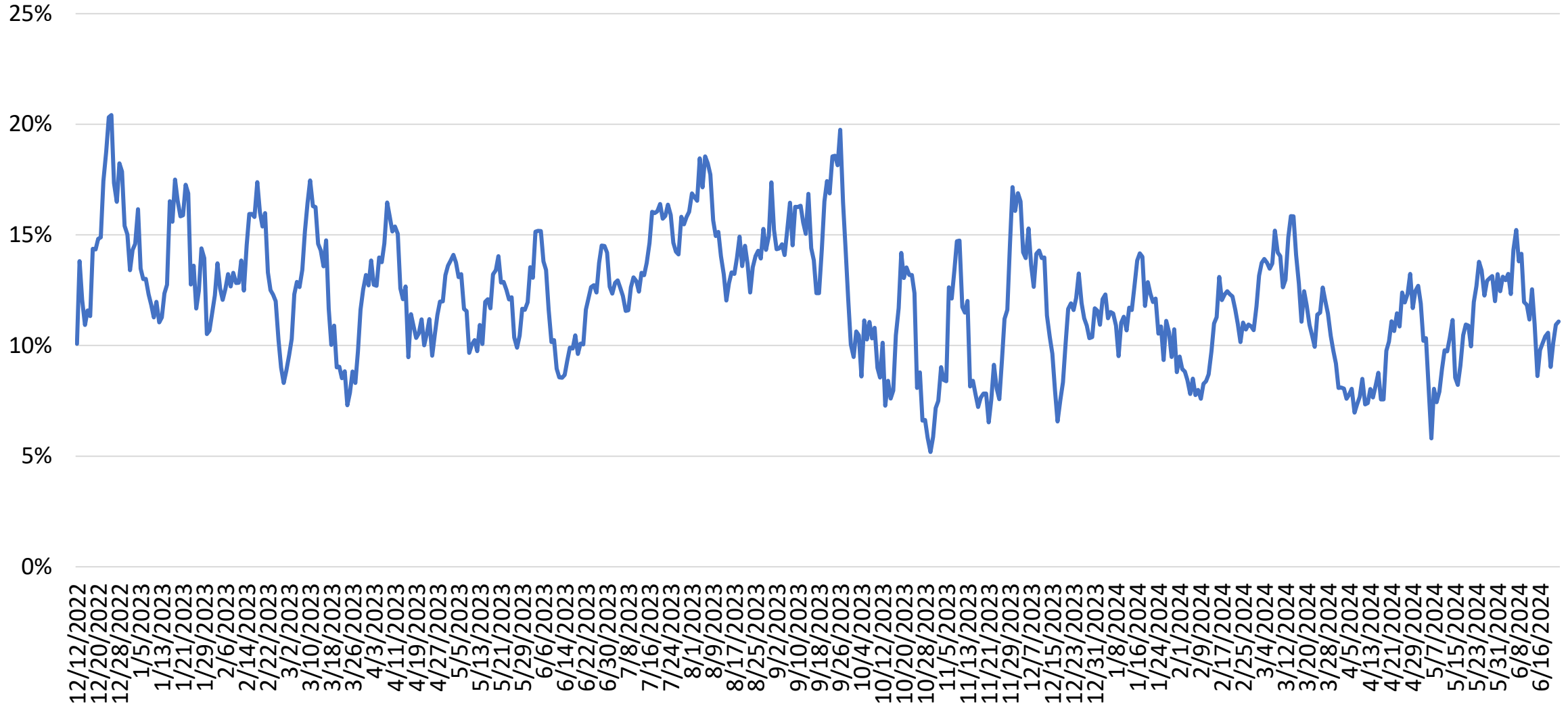


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**United States  
Responsible Travelers Segment  
State of Hawai'i**



# State of Hawai'i – Intent to Travel U.S. One-Week Moving Average



Source: Vision Insights Data as of June 25, 2024



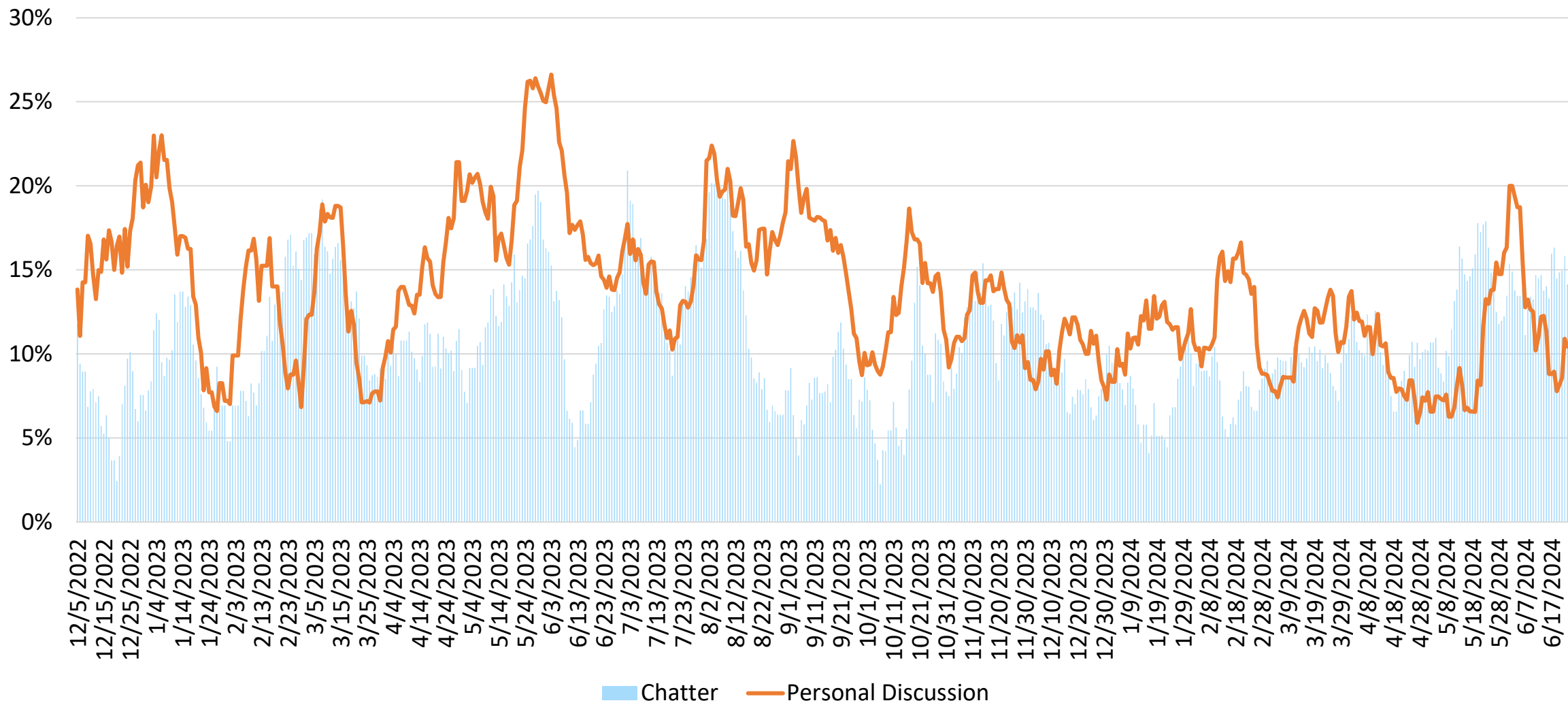
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# **United States Responsible Travelers Segment O'ahu**





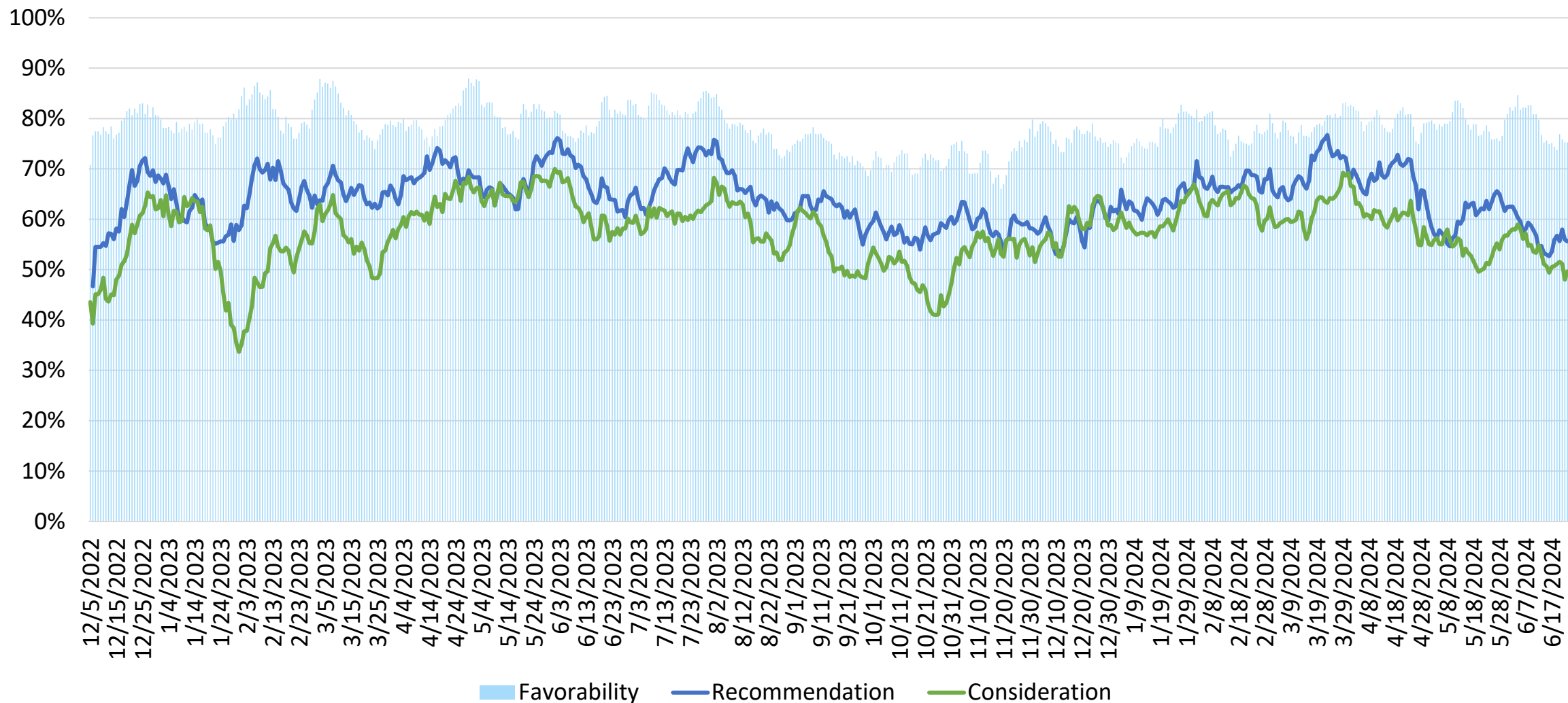
# O'ahu – Chatter (Net) and Personal Discussion U.S. Two-Week Moving Average



Source: Vision Insights Data as of June 25, 2024

# O'ahu – Recommendation, Consideration and Favorability

## U.S. Two-Week Moving Average



Source: Vision Insights Data as of June 25, 2024

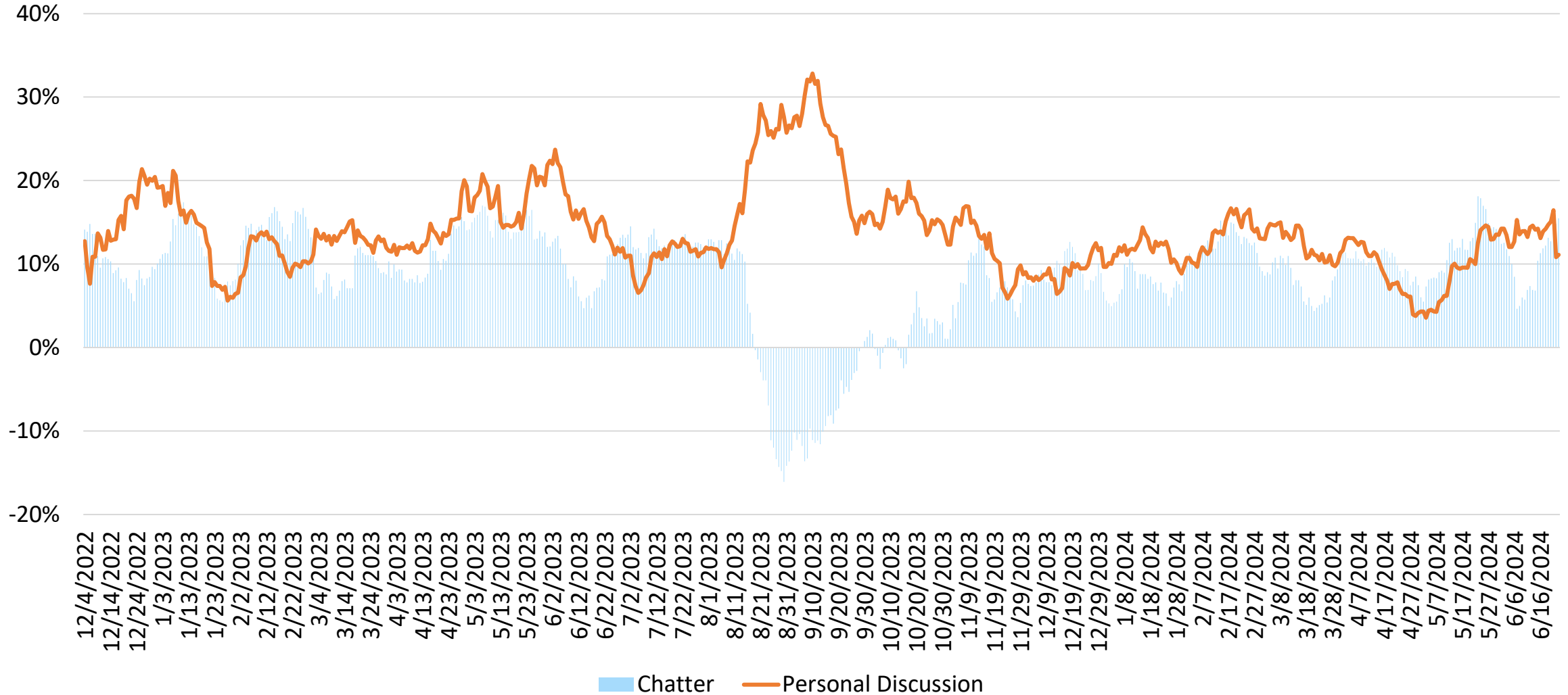


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# **United States Responsible Travelers Segment Maui**



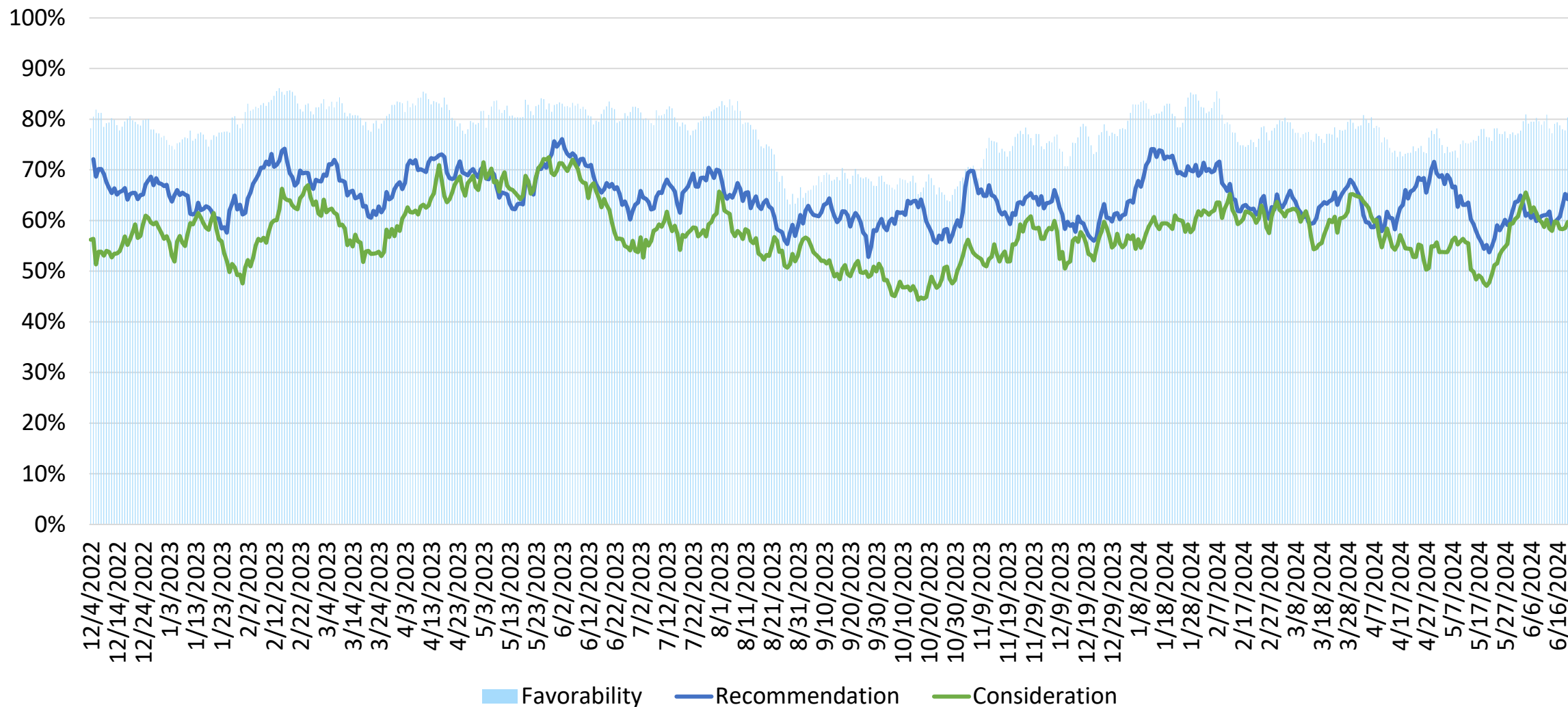
# Maui – Chatter (Net) and Personal Discussion U.S. Two-Week Moving Average



Source: Vision Insights Data as of June 25, 2024

# Maui – Recommendation, Consideration and Favorability

## U.S. Two-Week Moving Average



Source: Vision Insights Data as of June 25, 2024

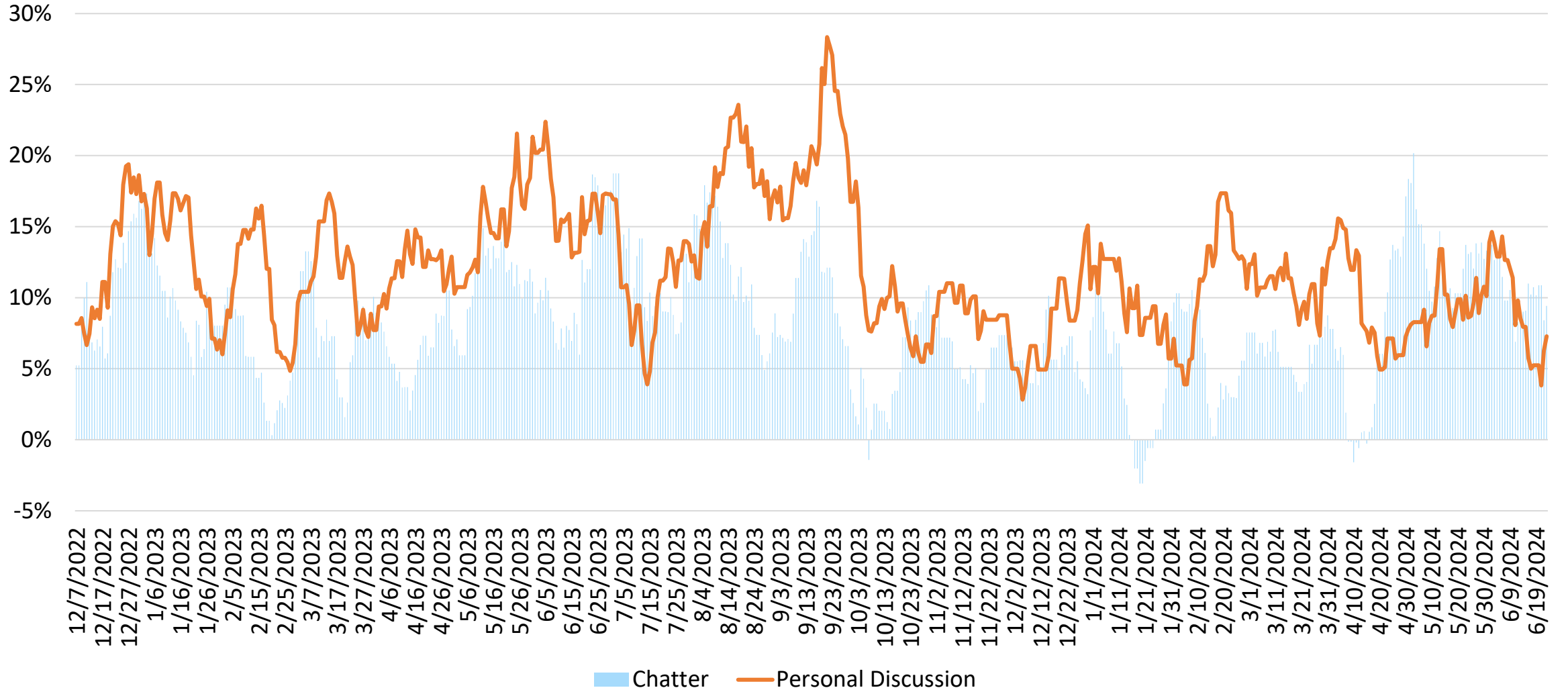


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# **United States Responsible Travelers Segment Kaua'i**



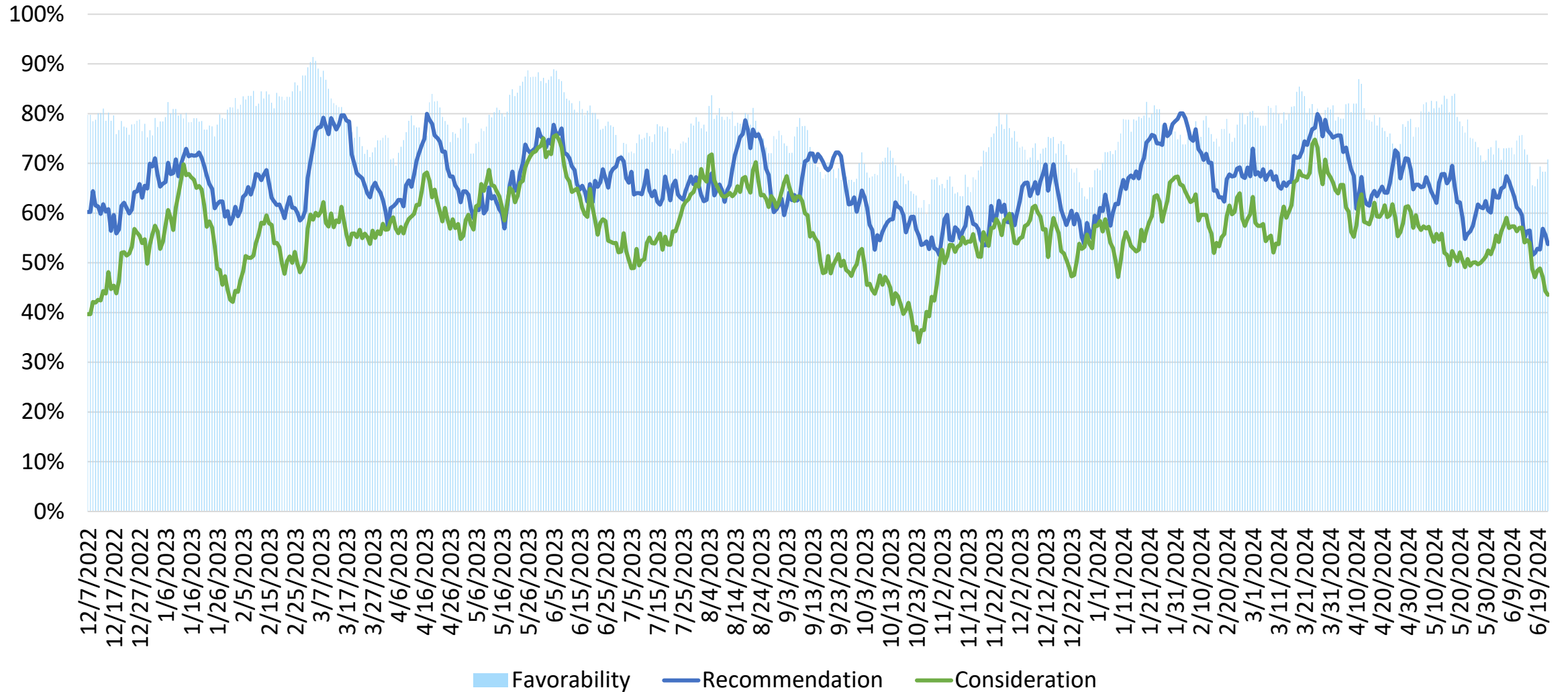
# Kaua'i – Chatter (Net) and Personal Discussion U.S. Two-Week Moving Average



Source: Vision Insights Data as of June 25, 2024

# Kaua'i – Recommendation, Consideration and Favorability

## U.S. Two-Week Moving Average



Source: Vision Insights Data as of June 25, 2024



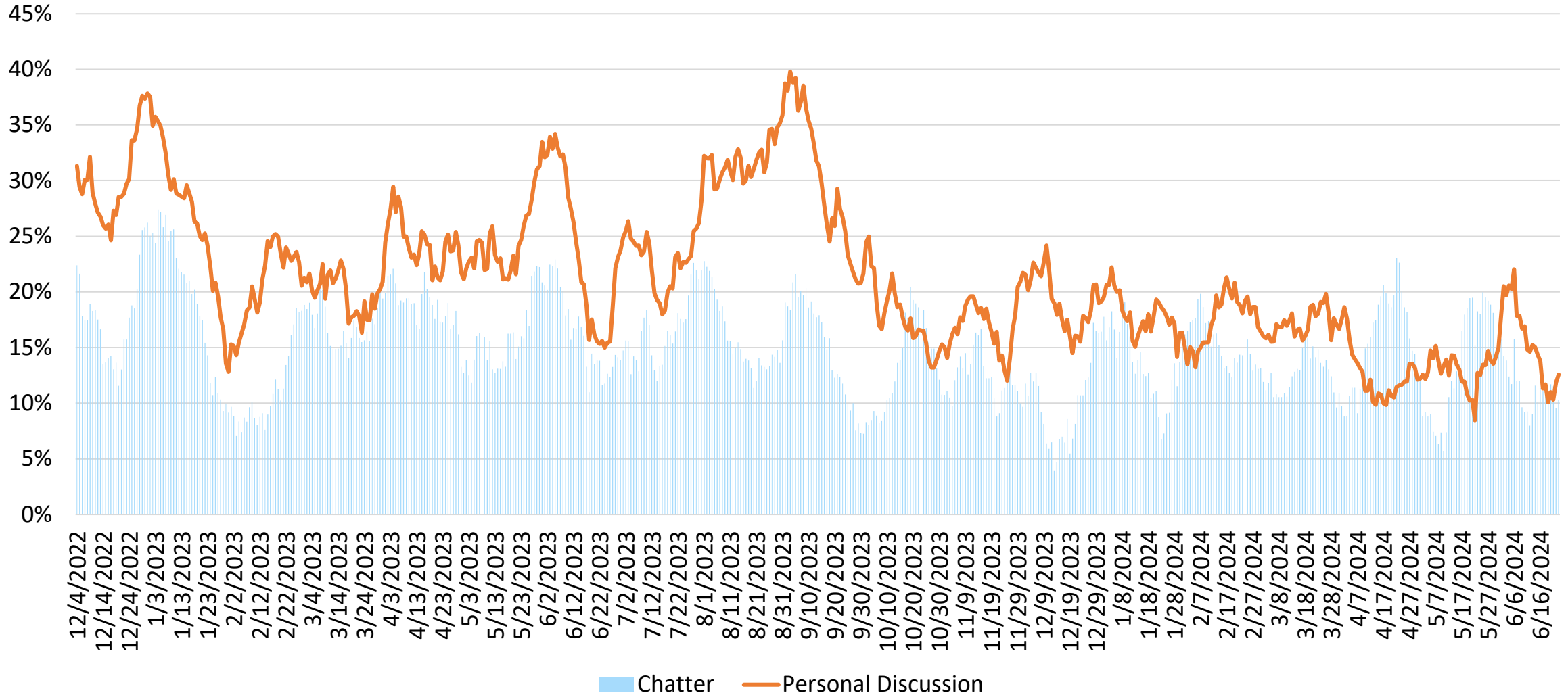


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**United States  
Responsible Travelers Segment  
Hawai'i Island**



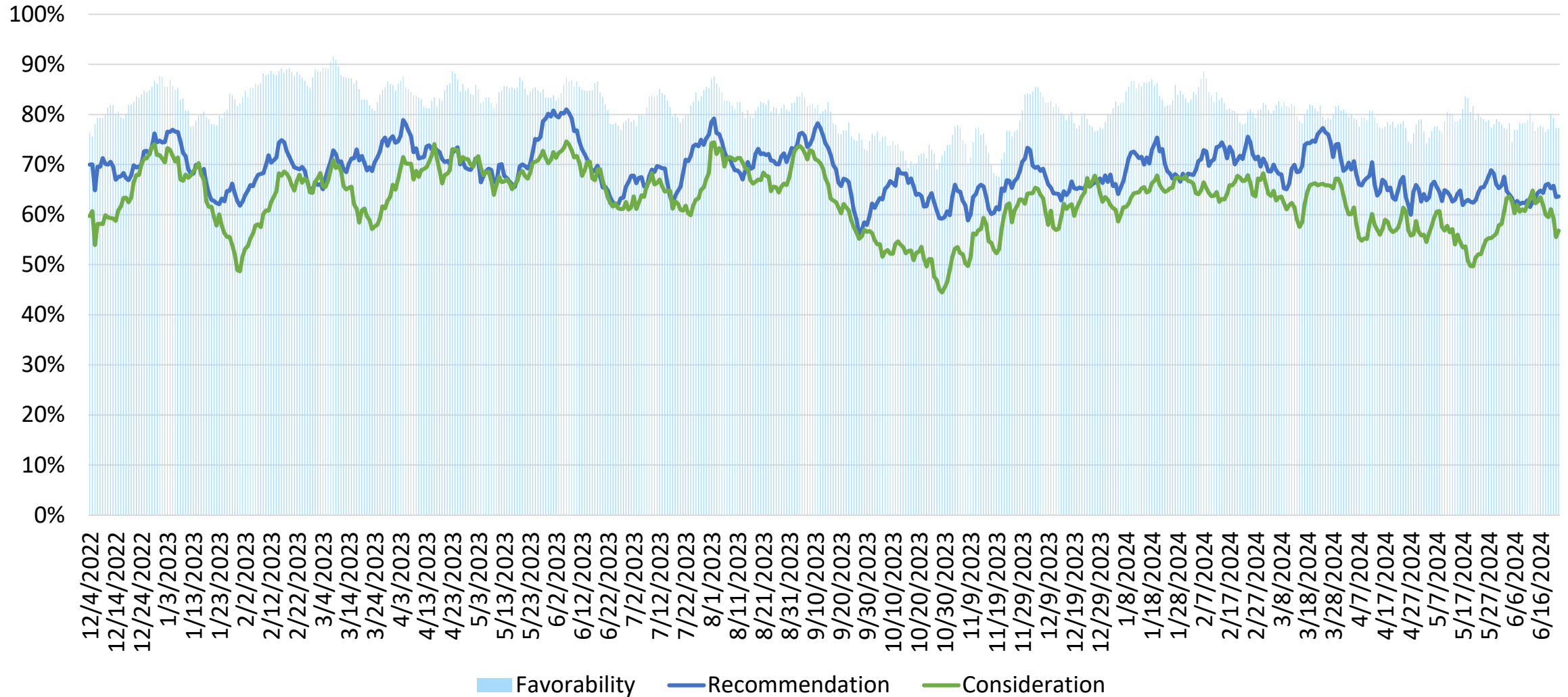
# Hawai'i Island – Chatter (Net) and Personal Discussion U.S. Two-Week Moving Average



Source: Vision Insights Data as of June 25, 2024

# Hawai'i Island – Recommendation, Consideration and Favorability

## U.S. Two-Week Moving Average



Source: Vision Insights Data as of June 25, 2024