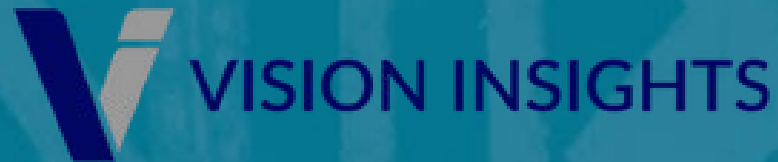




STATE OF HAWAII • DEPARTMENT OF BUSINESS,
ECONOMIC DEVELOPMENT & TOURISM

Vision Insights Responsible Travelers Segment United States

March 12, 2025



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

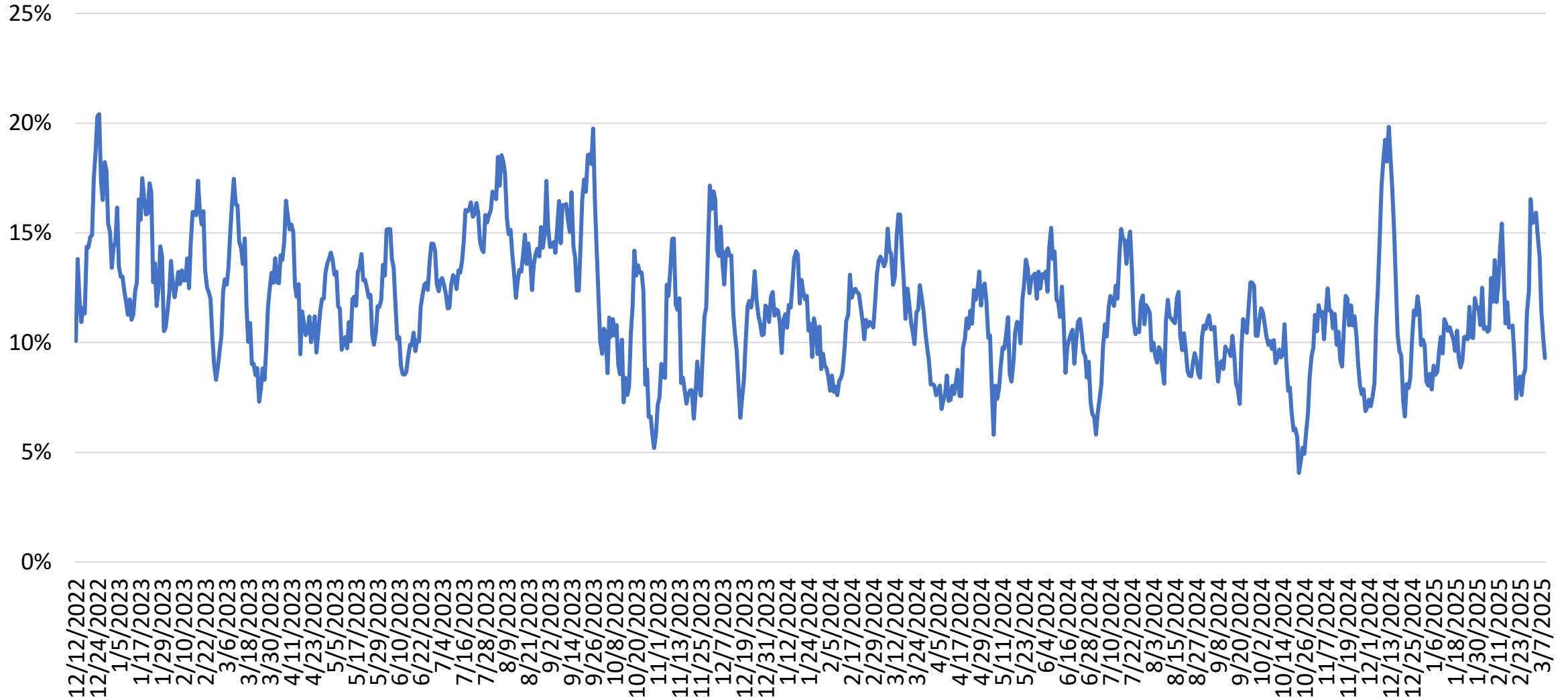


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**United States
Responsible Travelers Segment
State of Hawai'i**



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

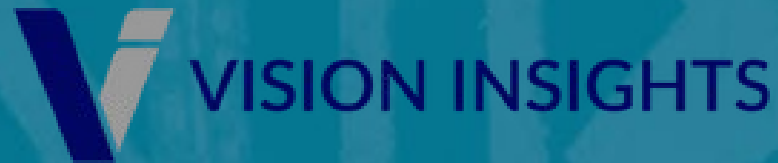


Source: Vision Insights Data as of March 12, 2025

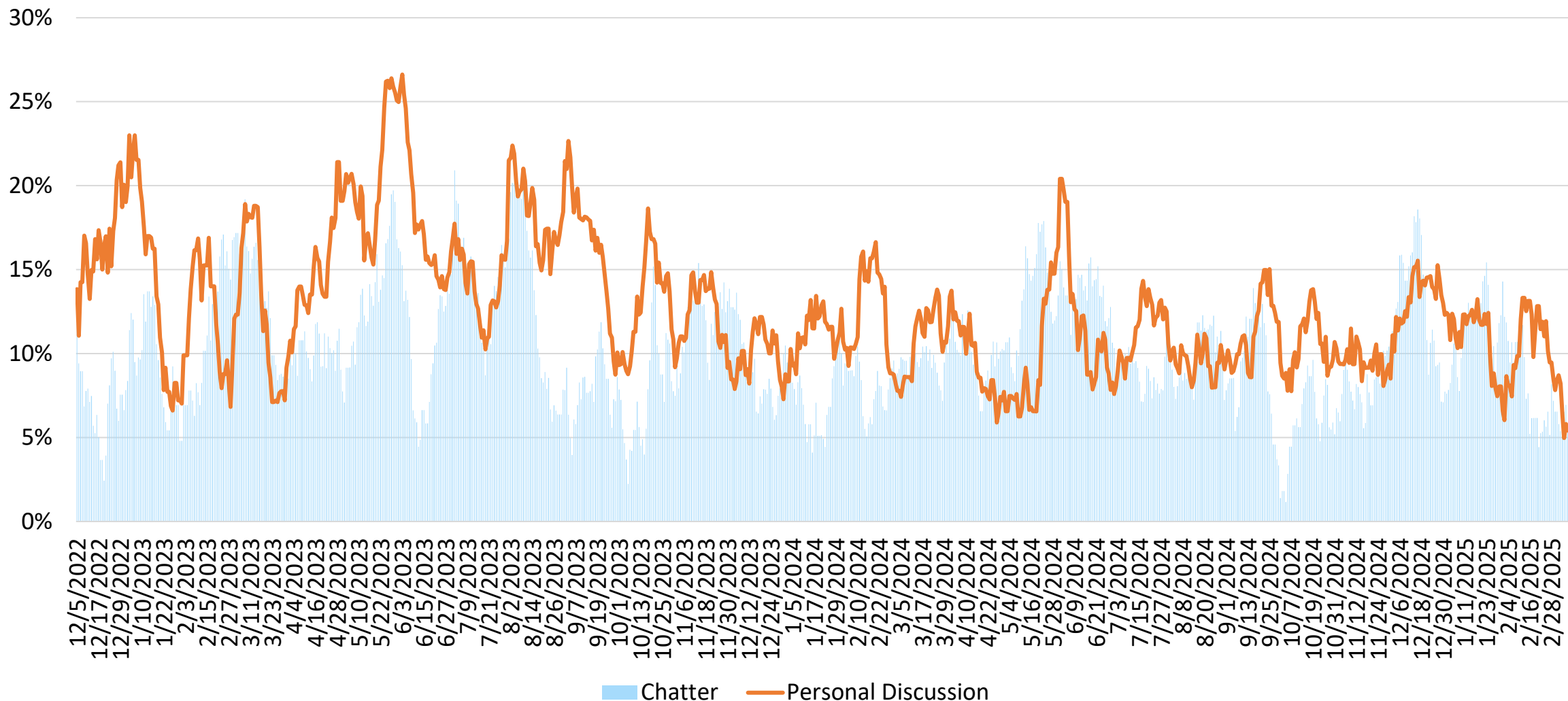


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United States Responsible Travelers Segment O'ahu



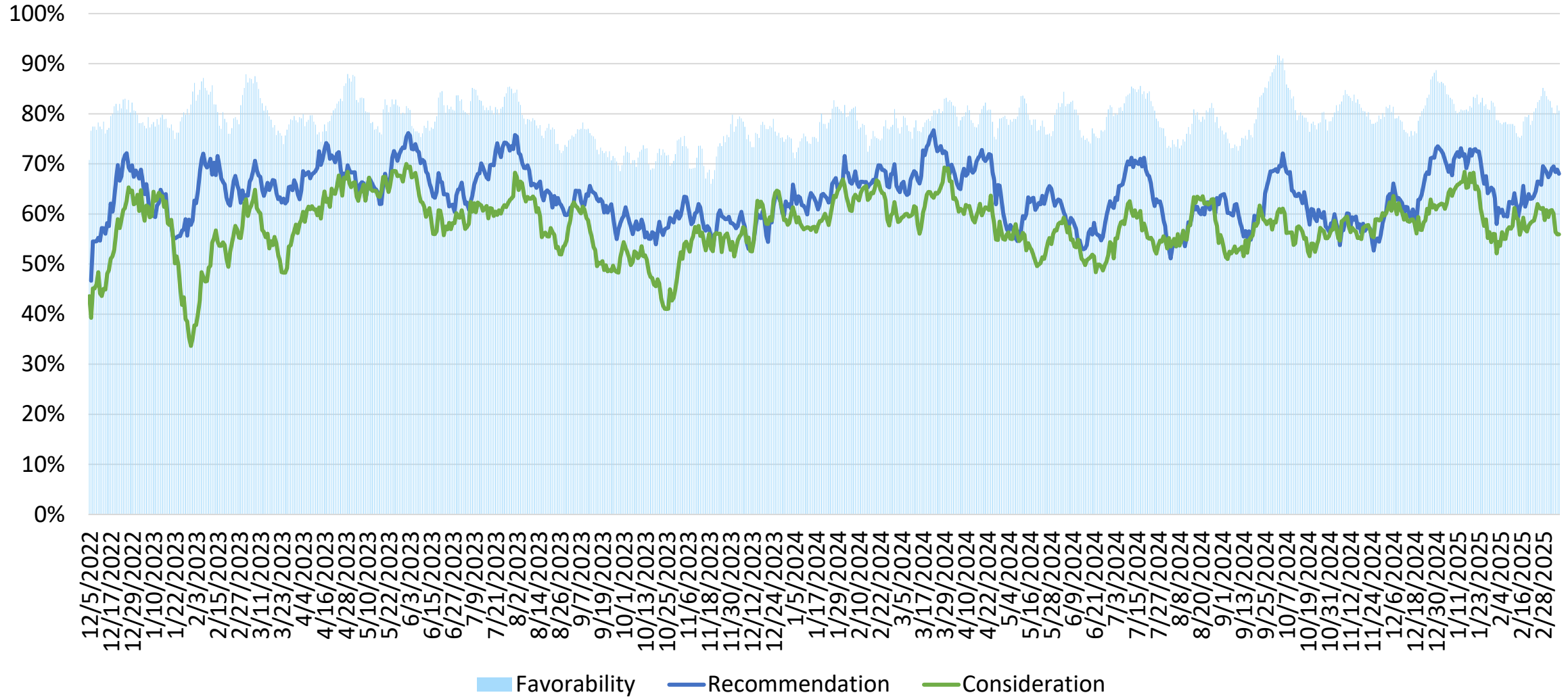
O'ahu – Chatter (Net) and Personal Discussion U.S. Two-Week Moving Average



Source: Vision Insights Data as of March 12, 2025

O'ahu – Recommendation, Consideration and Favorability

U.S. Two-Week Moving Average



Source: Vision Insights Data as of March 12, 2025

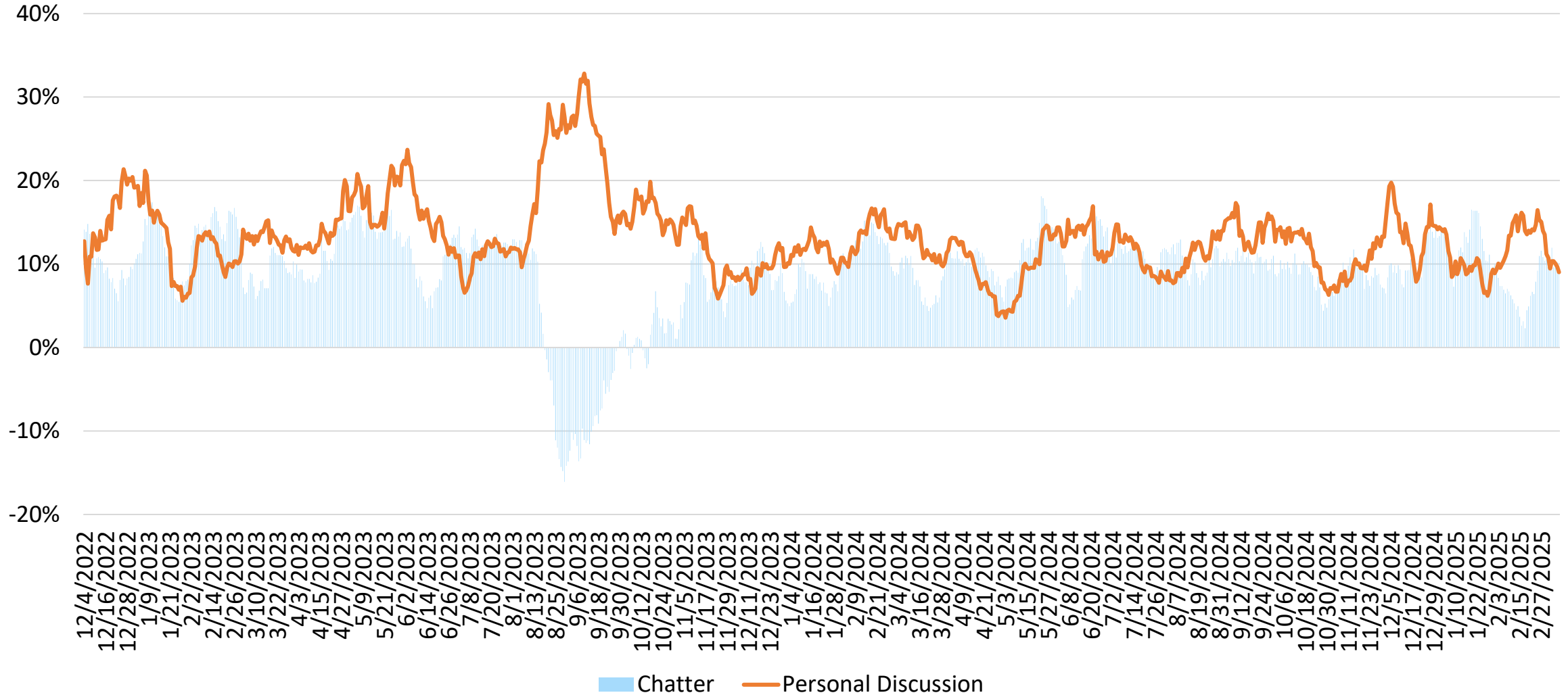


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United States Responsible Travelers Segment Maui



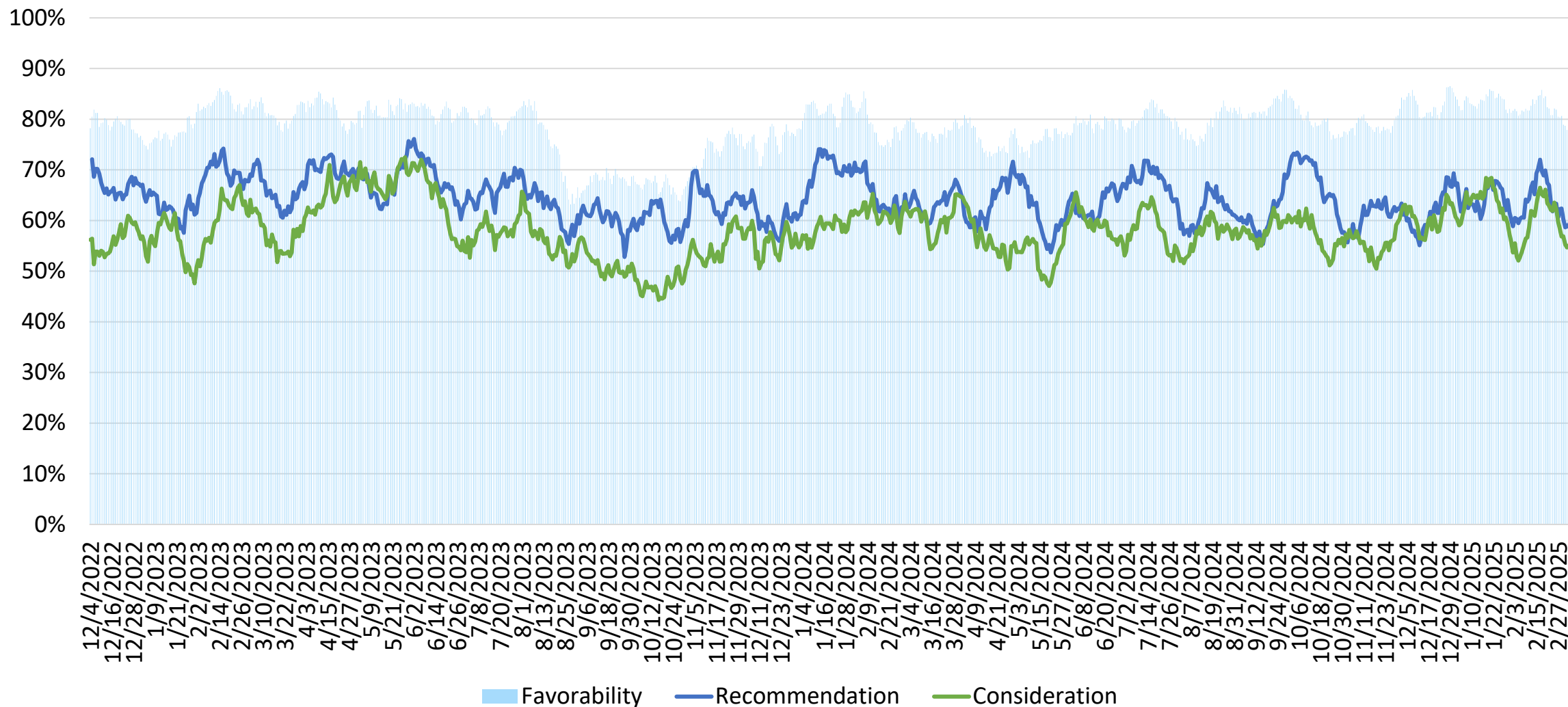
Maui – Chatter (Net) and Personal Discussion U.S. Two-Week Moving Average



Source: Vision Insights Data as of March 12, 2025

Maui – Recommendation, Consideration and Favorability

U.S. Two-Week Moving Average



Source: Vision Insights Data as of March 12, 2025

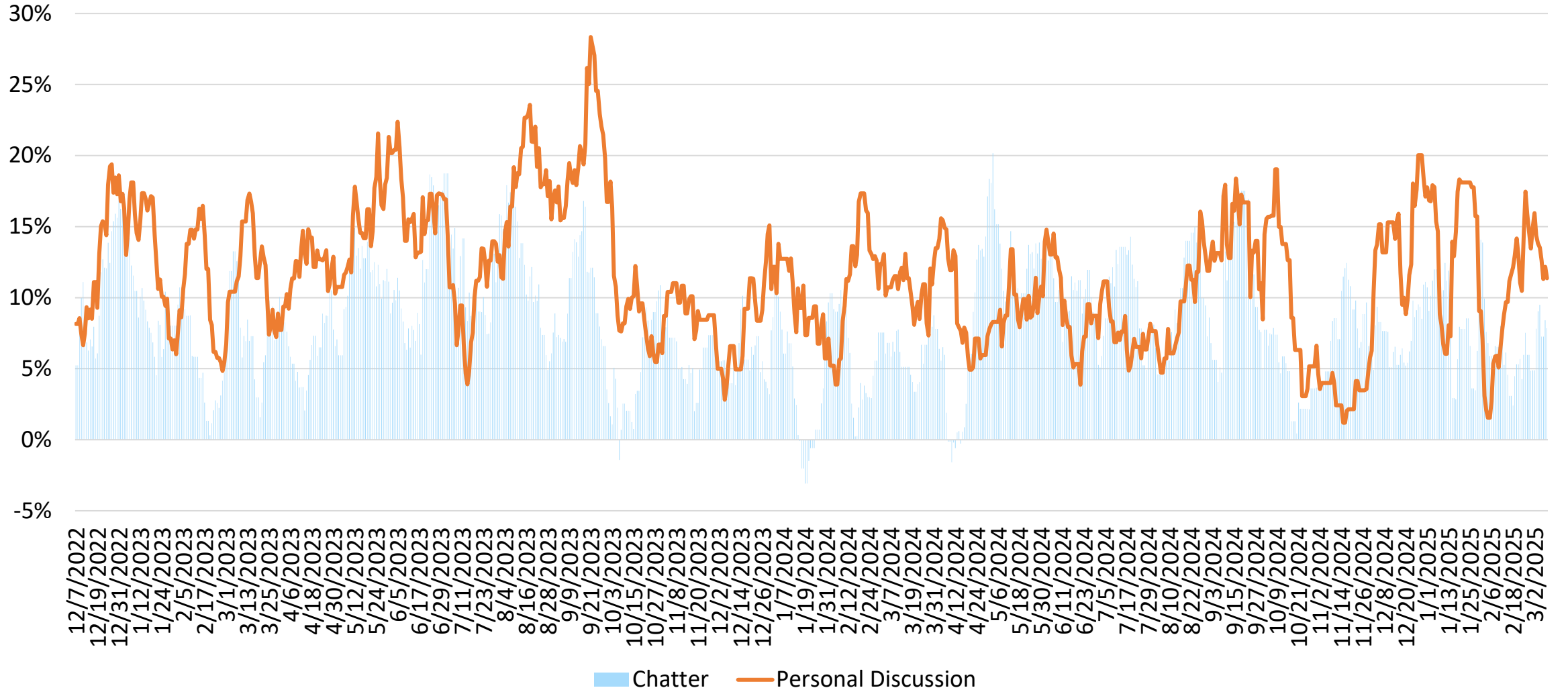


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United States Responsible Travelers Segment Kaua'i



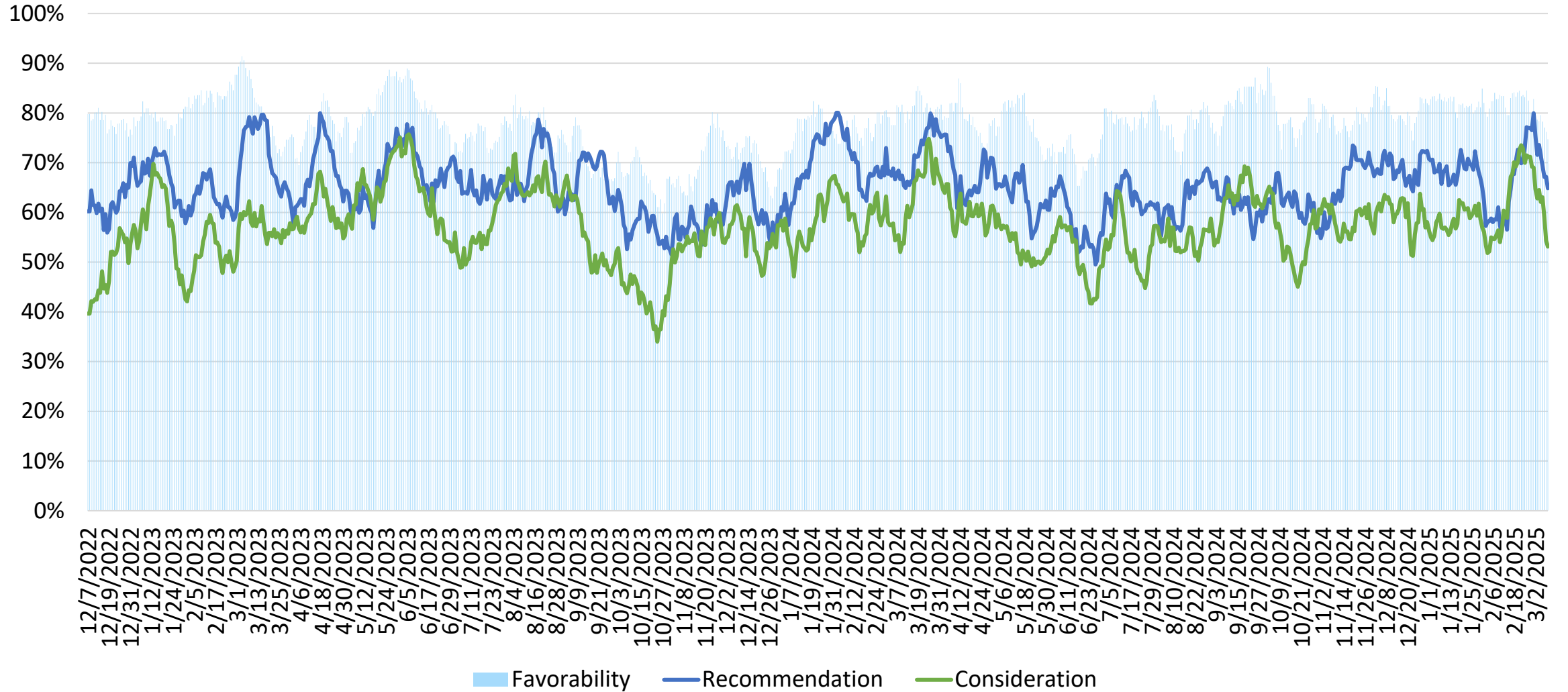
Kaua'i – Chatter (Net) and Personal Discussion U.S. Two-Week Moving Average



Source: Vision Insights Data as of March 12, 2025

Kaua'i – Recommendation, Consideration and Favorability

U.S. Two-Week Moving Average



Source: Vision Insights Data as of March 12, 2025

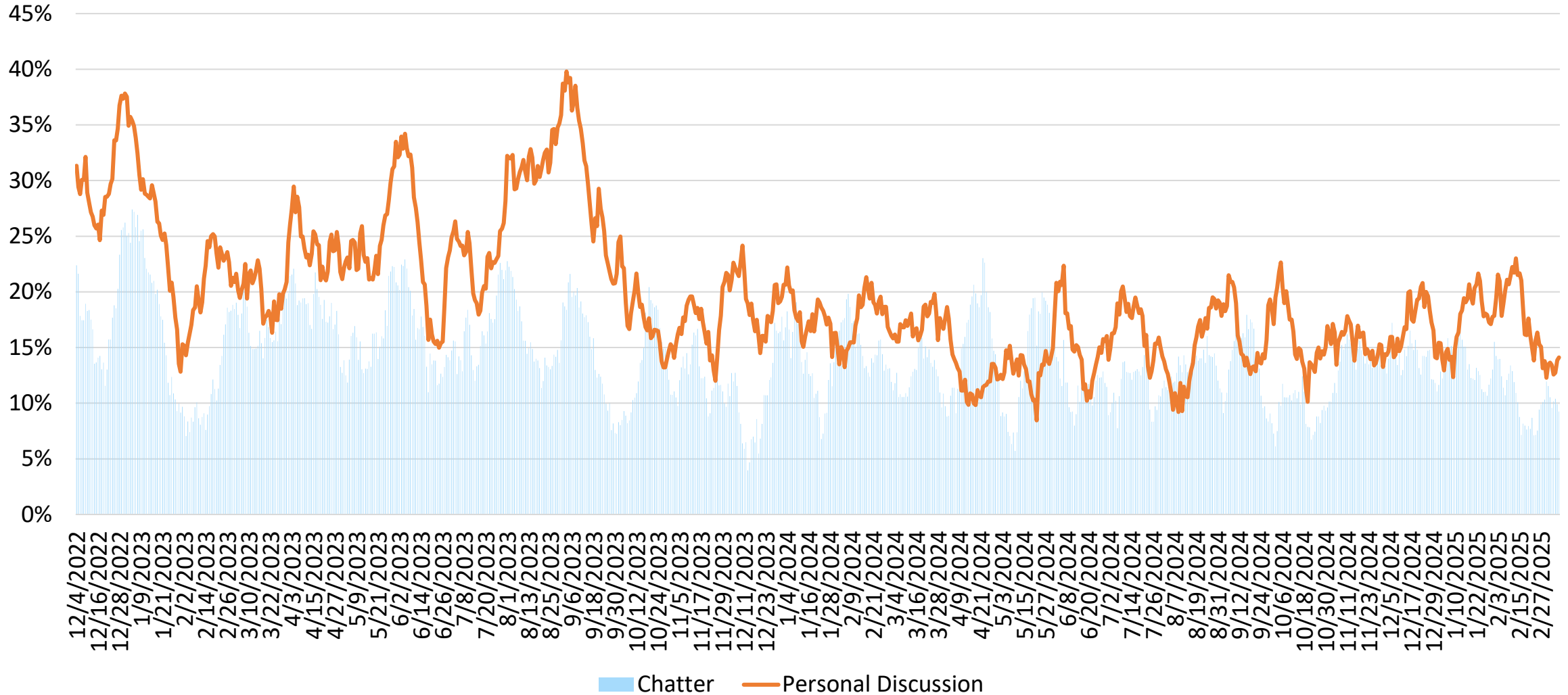


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**United States
Responsible Travelers Segment
Hawai'i Island**



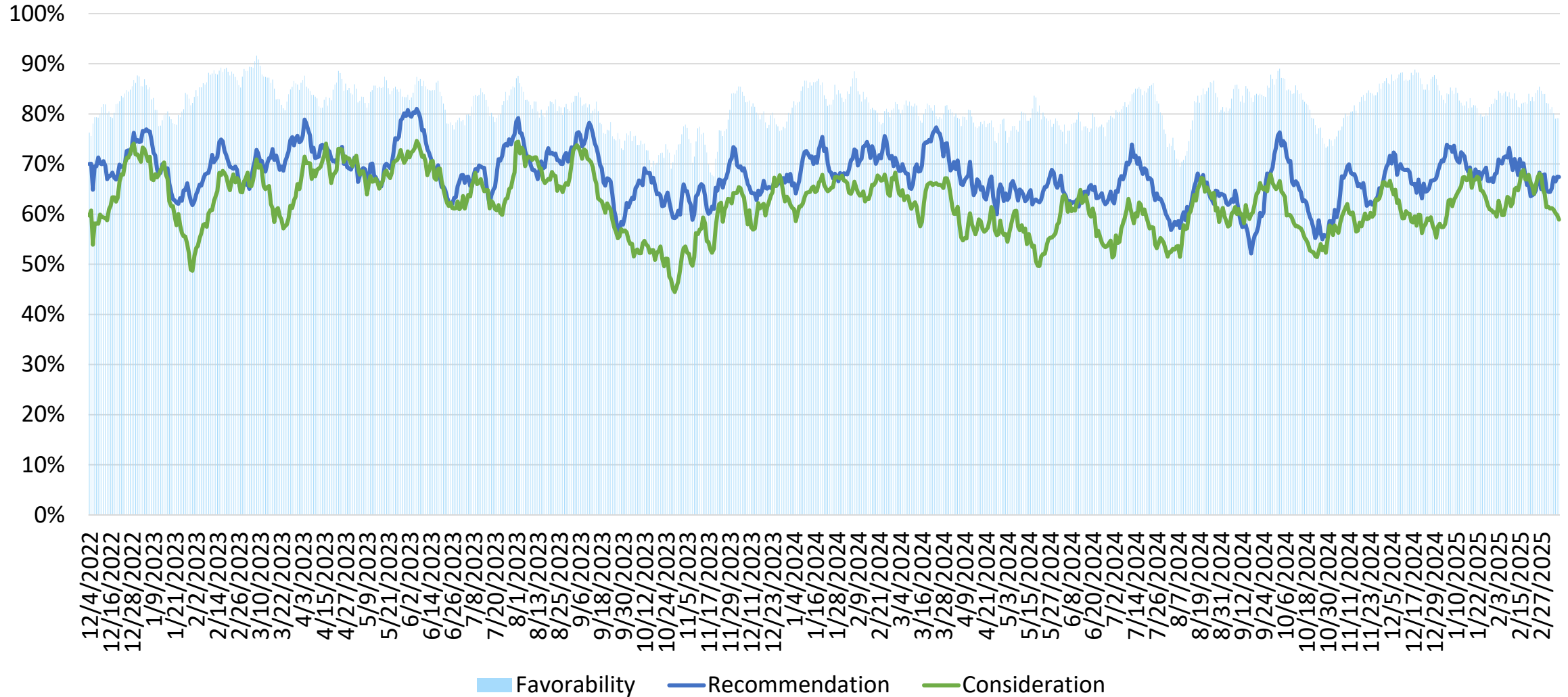
Hawai'i Island – Chatter (Net) and Personal Discussion U.S. Two-Week Moving Average



Source: Vision Insights Data as of March 12, 2025

Hawai'i Island – Recommendation, Consideration and Favorability

U.S. Two-Week Moving Average



Source: Vision Insights Data as of March 12, 2025