



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

Vision Insights Responsible Travelers Segment United States

May 27, 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 re-
opening West
Maui to visitors
starting October
8, 2023

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

2024 Significant Dates

August 2, 2024 –
Hawaii Governor Josh Green announced a historic settlement of \$4 billion to resolve all tort claims arising from the 2023 Maui wildfires

November 5, 2024 –
Donald Trump is elected as the 47th president of the United States of America

June 6 - 16, 2024 –
The 13th Festival of the Pacific Arts & Culture (FestPAC), which is the world's largest celebration of indigenous Pacific Islanders, took place at the Hawai'i Convention Center. Delegations from more than 20 nations participated in FestPAC

September 18, 2024 –
Hawaiian Airlines is officially acquired by Alaska Airlines, expanding passengers' access to domestic and international destinations

December 11, 2024 –
The 11th Eddie Aikau Big Wave Invitational surfing competition was held at Waimea Bay

2025 Significant Dates

January 7, 2025 –
California governor Gavin Newsom proclaimed a state of emergency following the onset of the L.A. fires that same day

January 20, 2025 –
Donald Trump was sworn into office, becoming the 47th president of the United States of America. He signed over 20 executive orders on this day, which included topics relating to border security, gender ideology extremism, and the hiring freeze of federal civilian employees

March 18, 2025 –
Germany's Foreign Office has updated its travel advisory that entry through the Electronic System for Travel Authorization (ESTA) or a U.S. visa is not guaranteed every time and that the final decision rests with the U.S. border control

March 21, 2025 –
Canada and Finland updated their U.S. travel advisory. Canada advised travelers to register their stay if it exceeds 30 days. Finland warned travelers about the U.S.'s two-gender policy and the possibility of entry denial

March 25, 2025 –
The Netherlands has issued a new warning to Dutch citizens considering travel to the United States, especially for LGBTQ+ citizens

April 18, 2025 –
Ireland has updated its U.S. travel advisory to remind travelers about the U.S.'s two-gender policy and advises travelers to always carry immigration documents

January 13, 2025 –
Hawai'i Governor Josh Green announces the "Aloha for LA" program that would offer free flights and reduced hotel rates for first responders and those who lost their homes to the L.A. fires

March 14, 2025 –
The United Kingdom has revised its travel advice for British citizens planning to visit the United States, warning of potential arrest or detention if travelers violate the strict entry rules

March 20, 2025 –
The Ministry of Foreign Affairs of Denmark advised transgender and nonbinary citizens to contact the U.S. embassy before visiting due to President Trump's two-gender policy

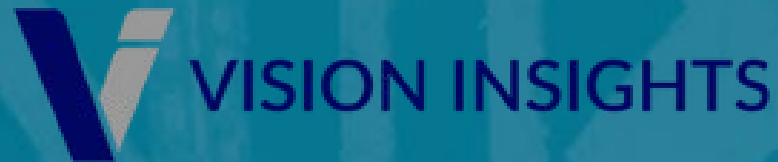
March 24, 2025 –
The French foreign ministry has modified its travel advisory to include information about the change in the U.S.'s gender policy

April 09, 2025 –
The tourism ministry of China has issued a new advisory about the U.S. to Chinese travelers due to the deterioration of trade relations between the United States and China



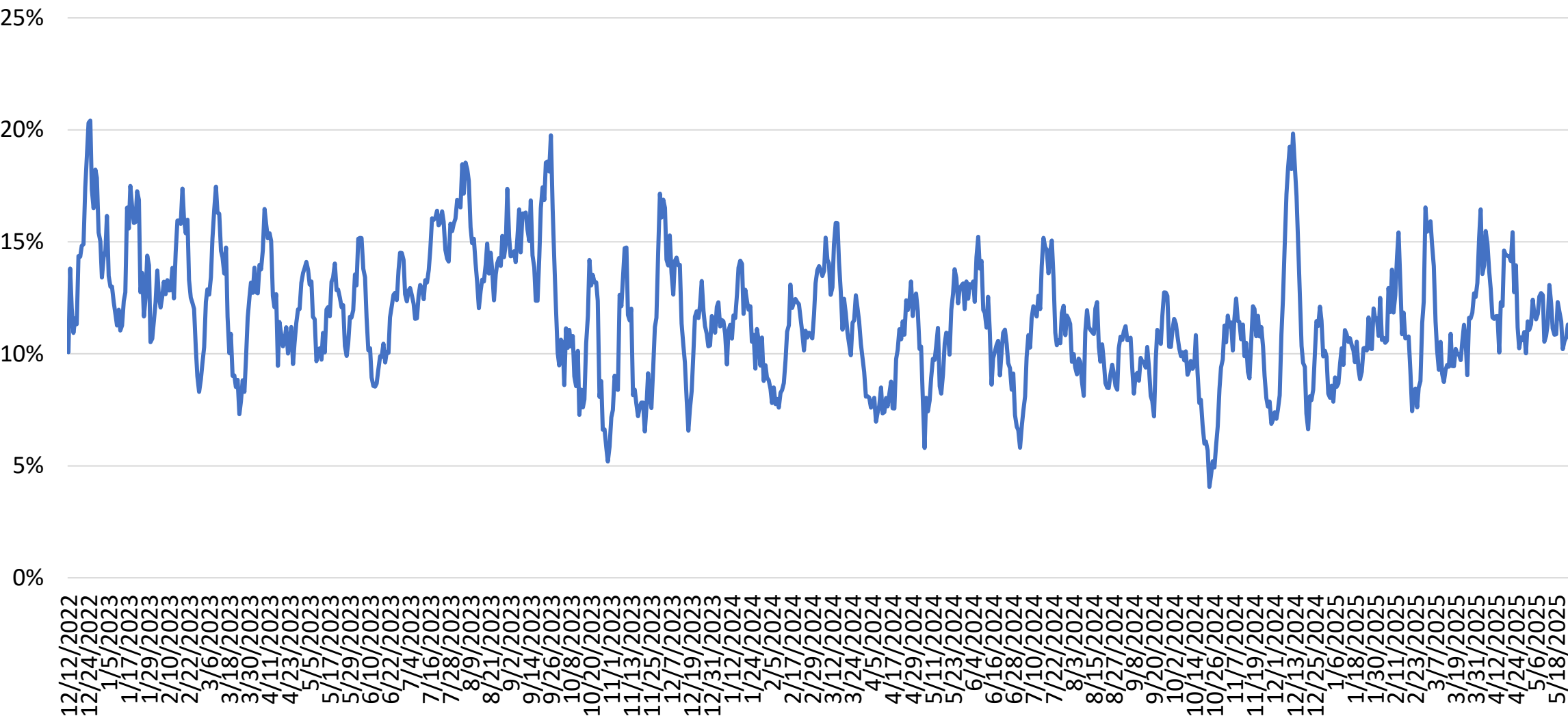
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United States Responsible Travelers Segment State of Hawai'i



State of Hawai‘i – Intent to Travel

U.S. One-Week Moving Average



Source: Vision Insights Data as of May 27, 2025

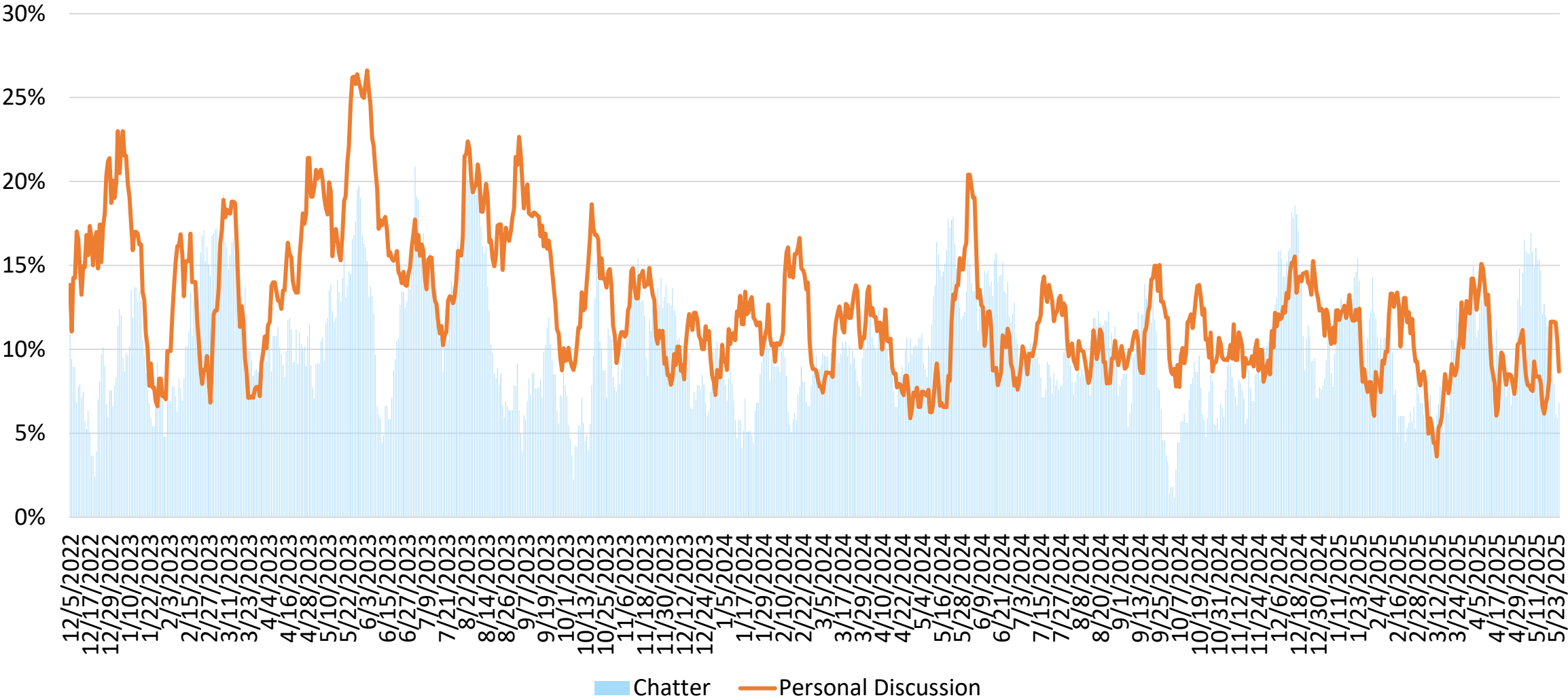


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United States Responsible Travelers Segment O'ahu



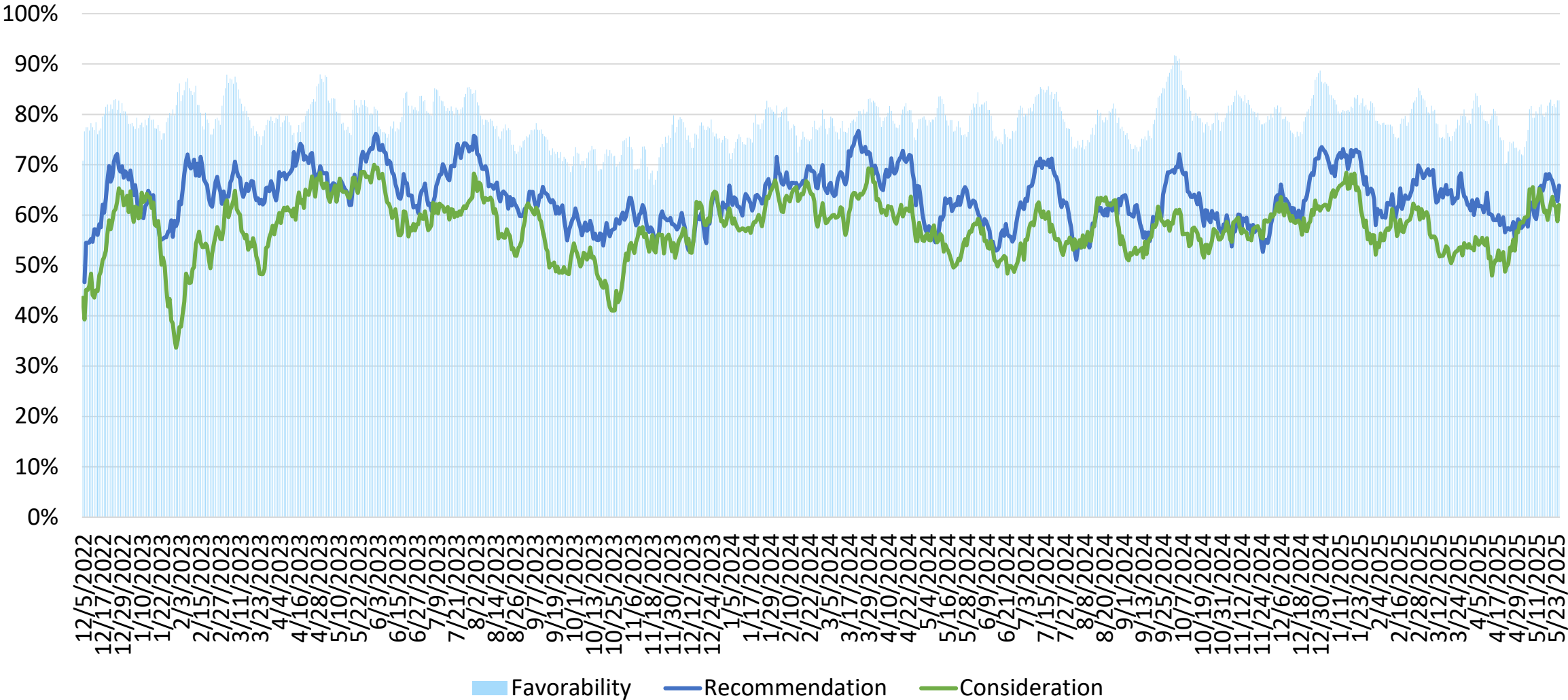
O‘ahu – Chatter (Net) and Personal Discussion U.S. Two-Week Moving Average



Source: Vision Insights Data as of May 27, 2025

O‘ahu – Recommendation, Consideration and Favorability

U.S. Two-Week Moving Average



Source: Vision Insights Data as of May 27, 2025

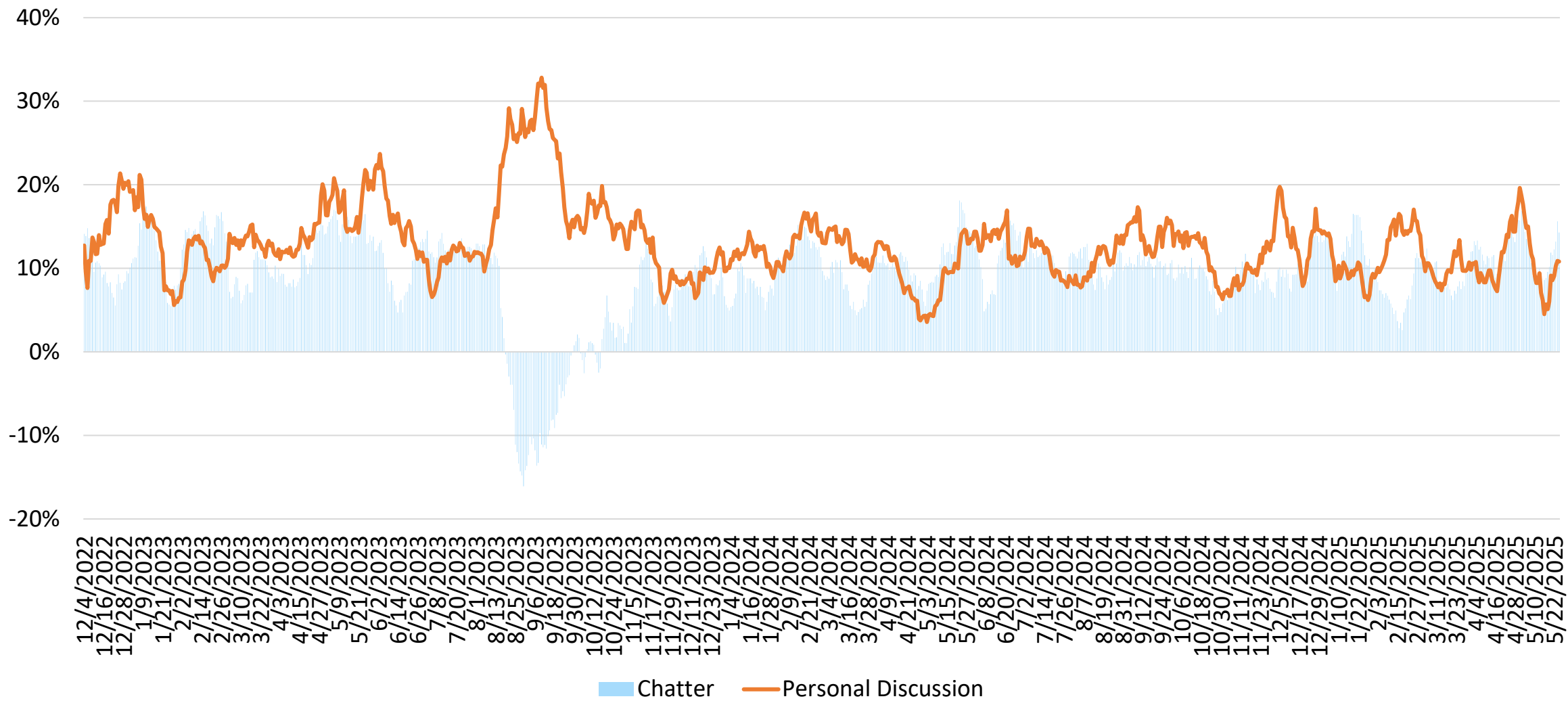


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United States Responsible Travelers Segment Maui



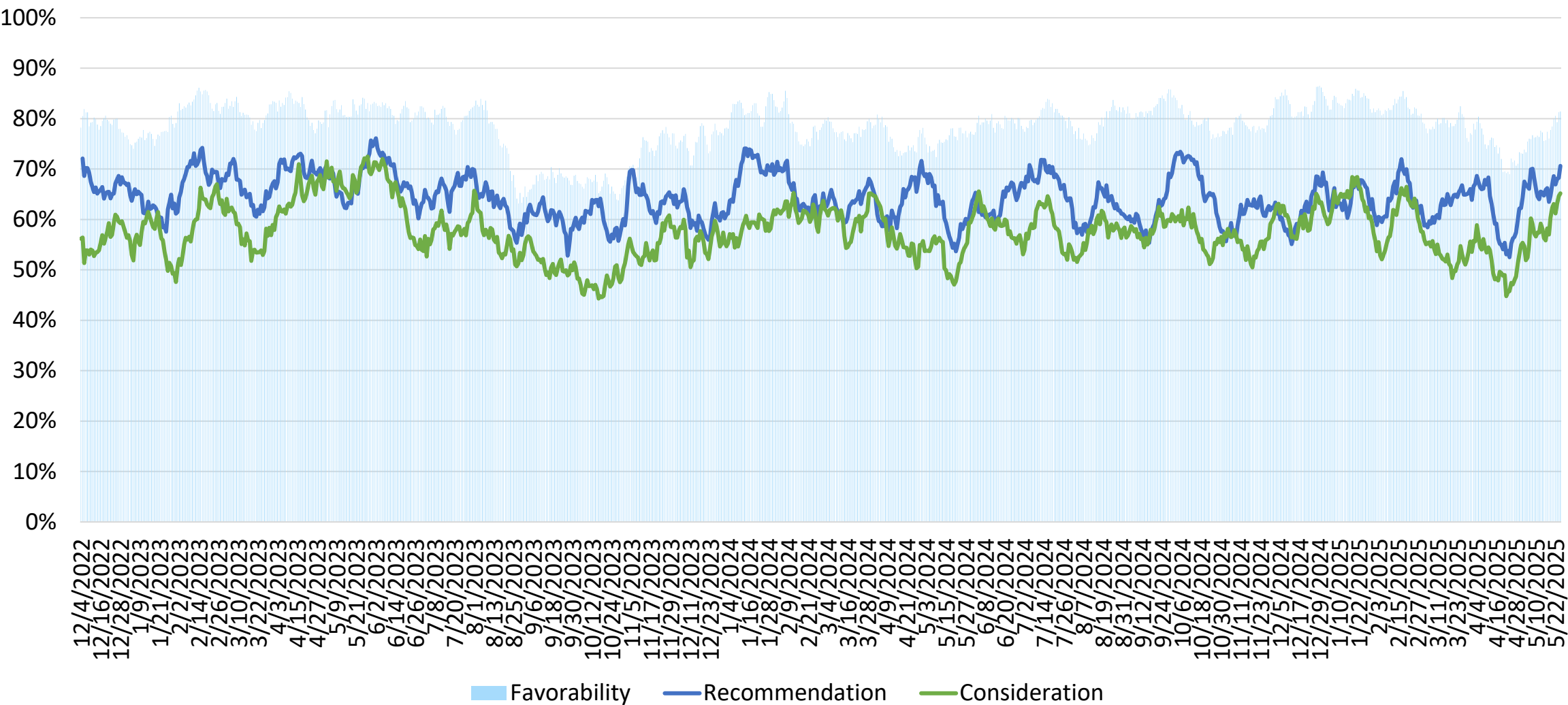
Maui – Chatter (Net) and Personal Discussion U.S. Two-Week Moving Average



Source: Vision Insights Data as of May 27, 2025

Maui – Recommendation, Consideration and Favorability

U.S. Two-Week Moving Average



Source: Vision Insights Data as of May 27, 2025

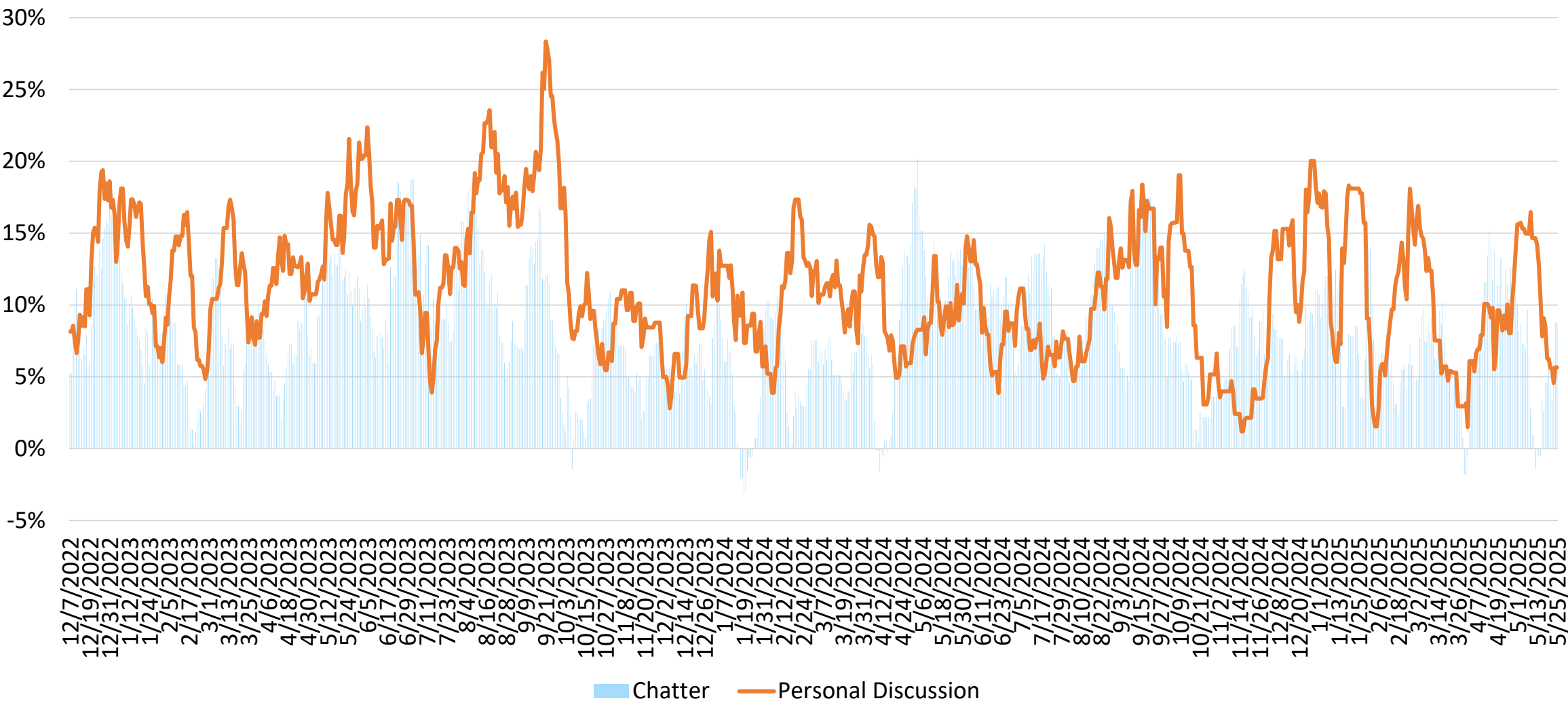


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United States Responsible Travelers Segment Kaua'i



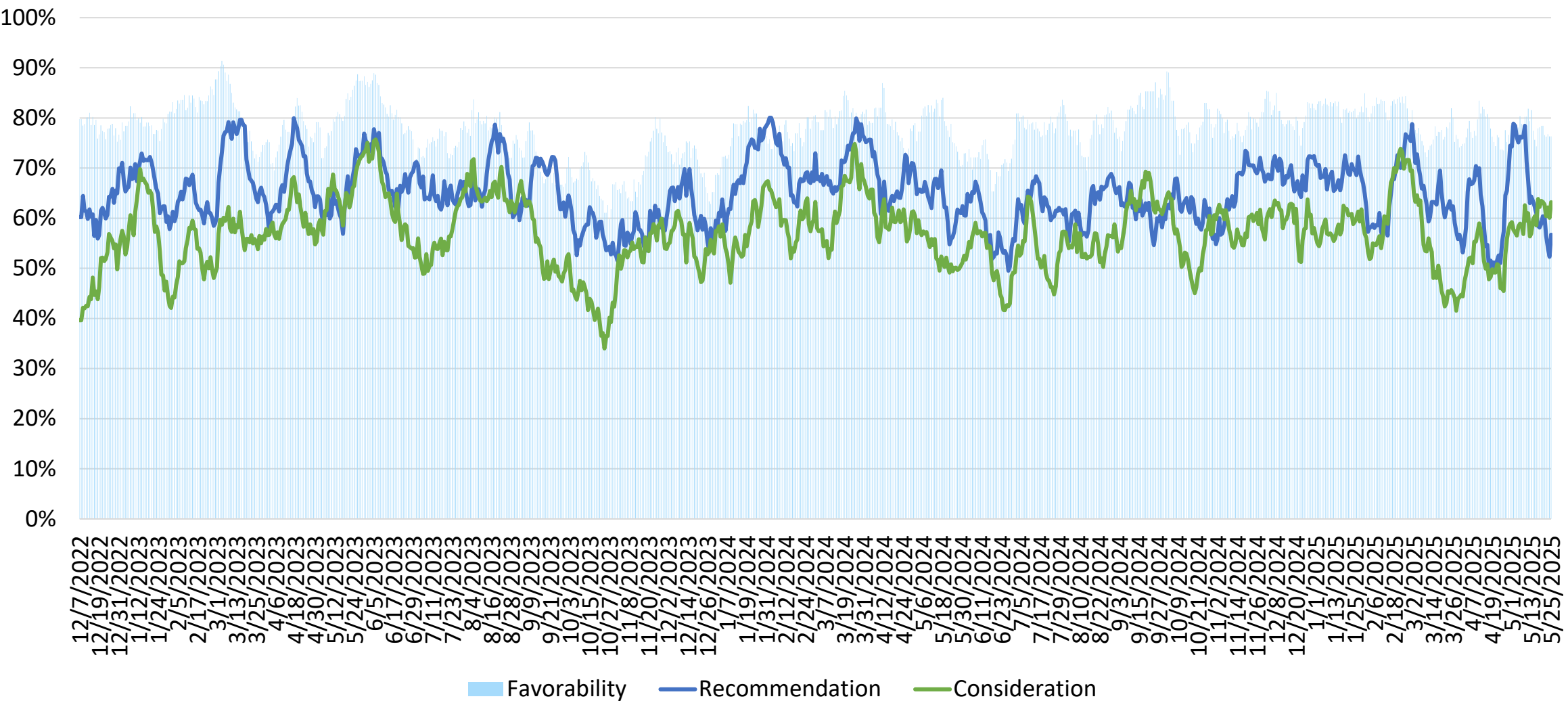
Kaua'i – Chatter (Net) and Personal Discussion U.S. Two-Week Moving Average



Source: Vision Insights Data as of May 27, 2025

Kaua'i – Recommendation, Consideration and Favorability

U.S. Two-Week Moving Average



Source: Vision Insights Data as of May 27, 2025

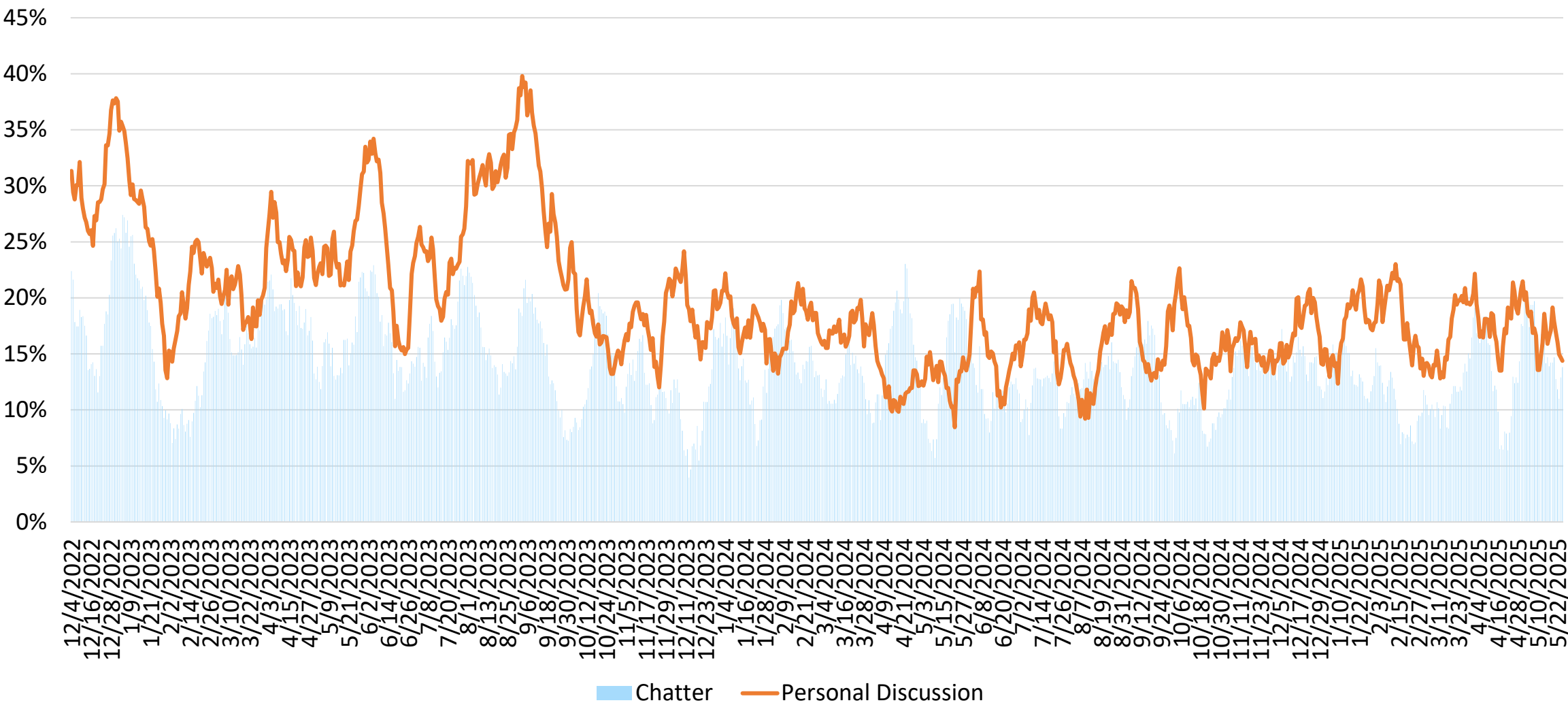


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United States Responsible Travelers Segment Hawai'i Island



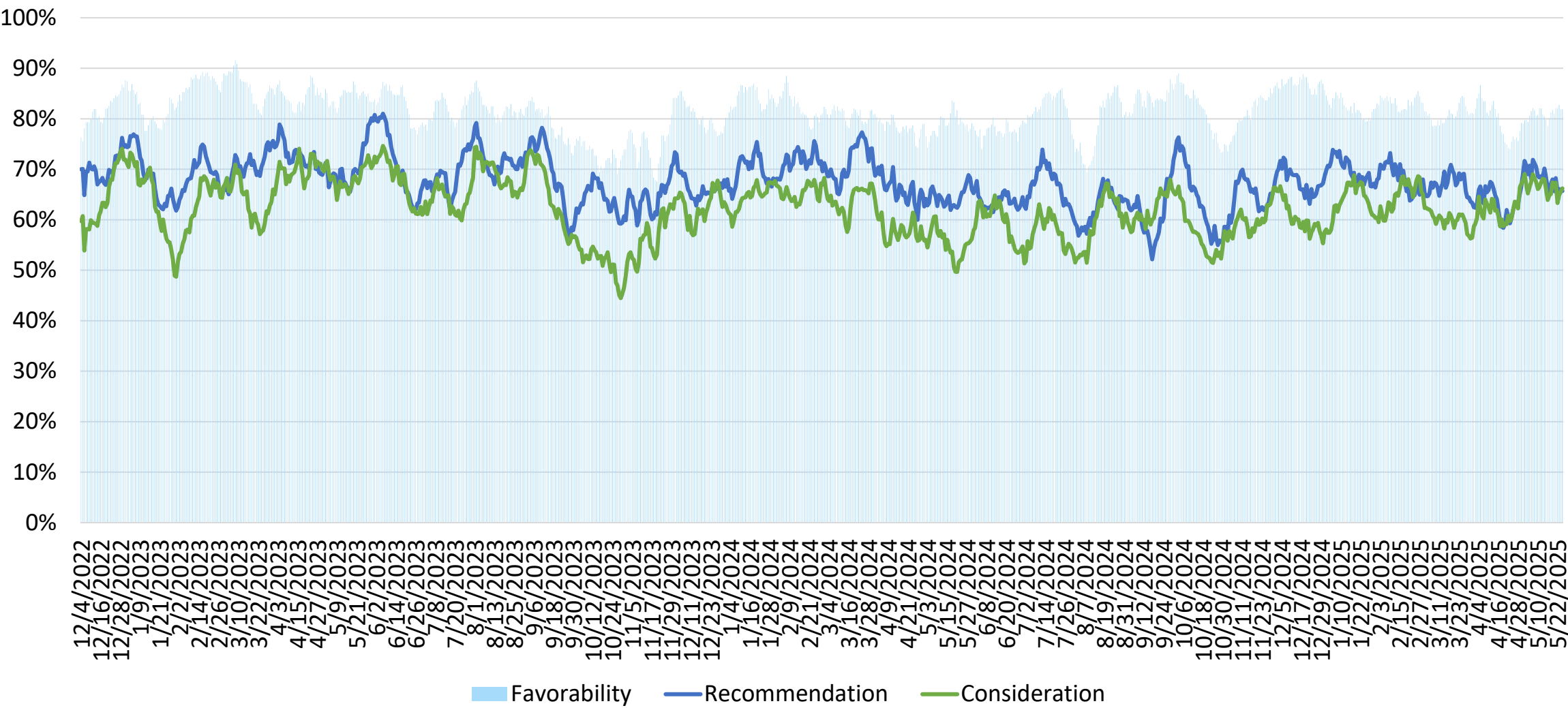
Hawai'i Island – Chatter (Net) and Personal Discussion U.S. Two-Week Moving Average



Source: Vision Insights Data as of May 27, 2025

Hawai‘i Island – Recommendation, Consideration and Favorability

U.S. Two-Week Moving Average



Source: Vision Insights Data as of May 27, 2025