



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

Vision Insights Responsible Travelers Segment

July 21, 2026



Vision Insights Syndicated Survey

- DBEDT subscribes to Vision Insight's Responsible Travelers Segment databases for the United States (U.S.), Canada, Australia, and Korea
- 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

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



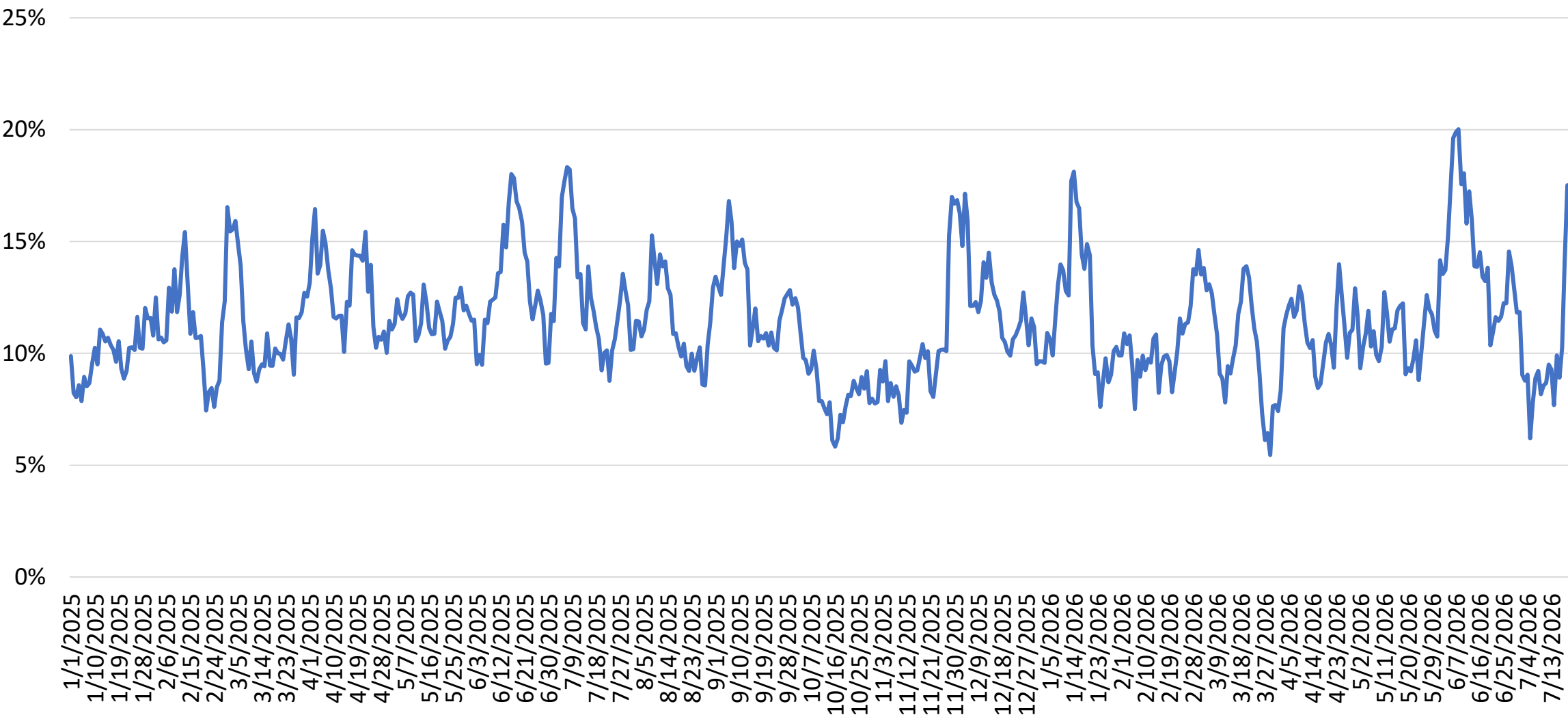
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United States Responsible Travelers Segment



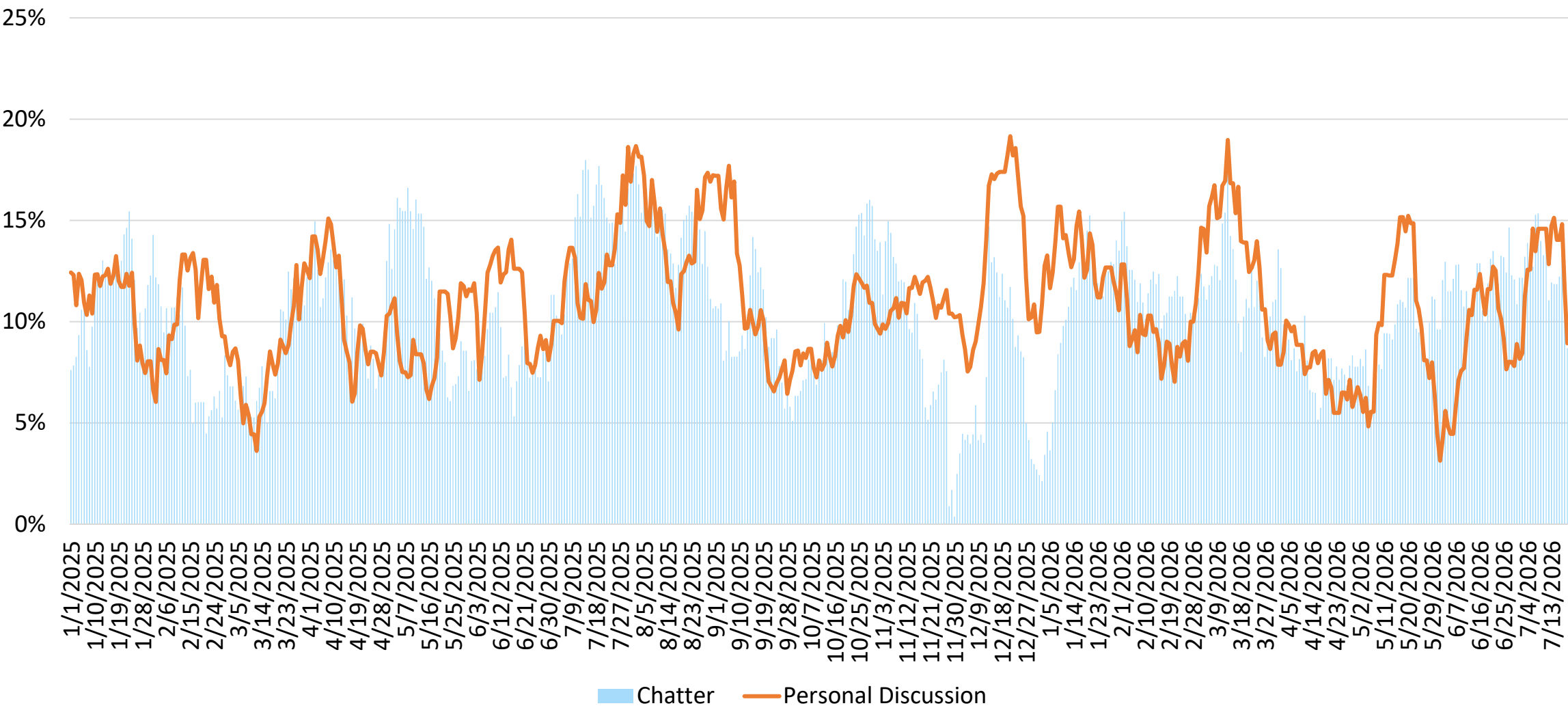
State of Hawai‘i – Intent to Travel

U.S. One-Week Moving Average



Source: Vision Insights Data as of July 21, 2026

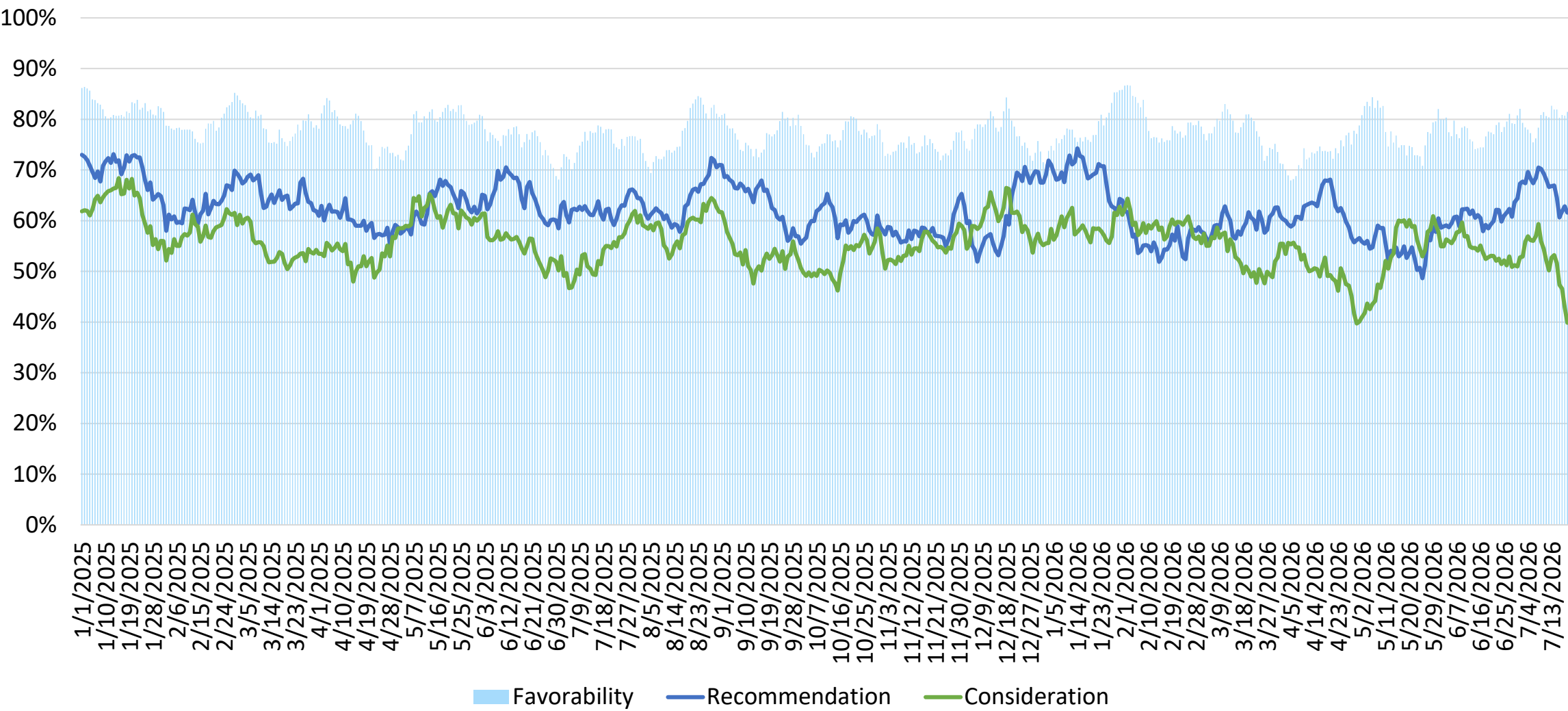
O‘ahu – Chatter (Net) and Personal Discussion U.S. Two-Week Moving Average



Source: Vision Insights Data as of July 21, 2026

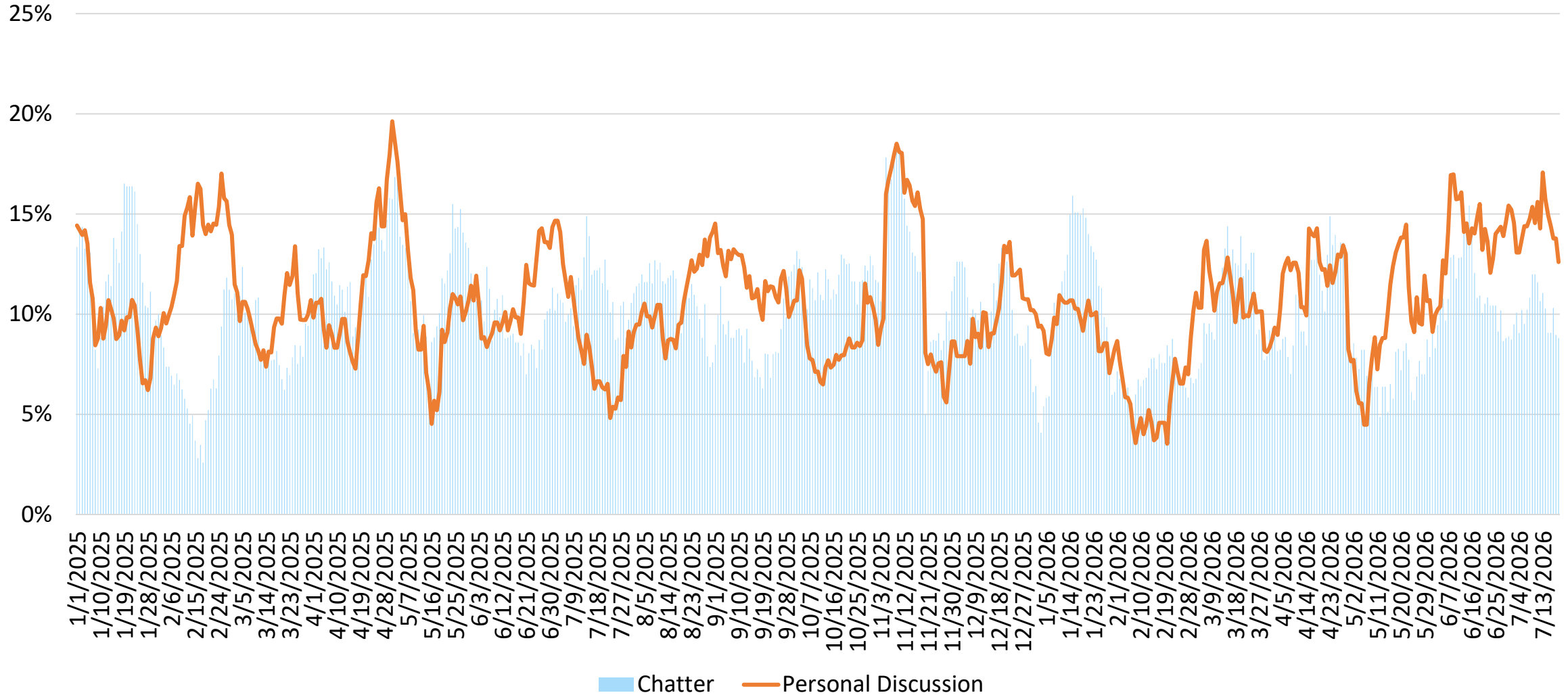
O‘ahu – Recommendation, Consideration and Favorability

U.S. Two-Week Moving Average



Source: Vision Insights Data as of July 21, 2026

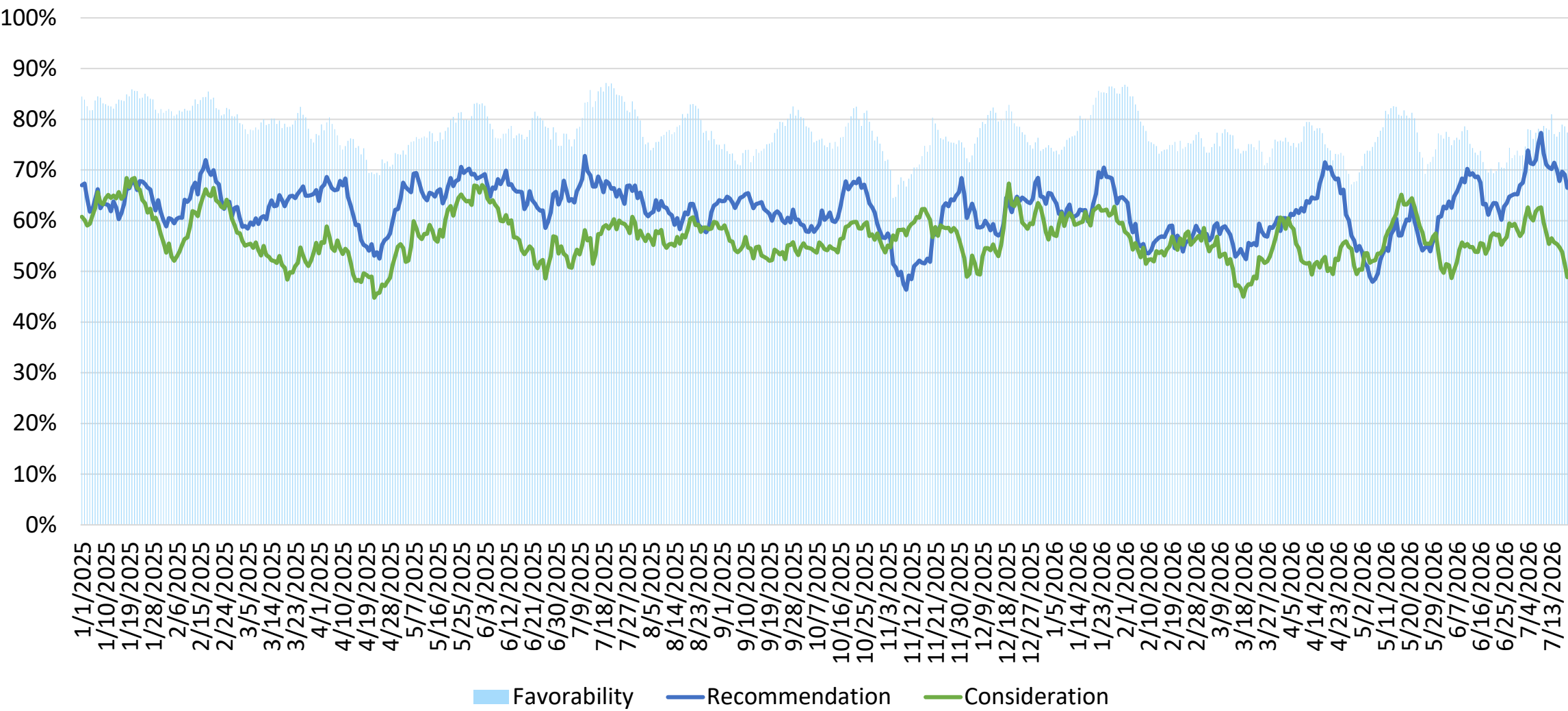
Maui – Chatter (Net) and Personal Discussion U.S. Two-Week Moving Average



Source: Vision Insights Data as of July 21, 2026

Maui – Recommendation, Consideration and Favorability

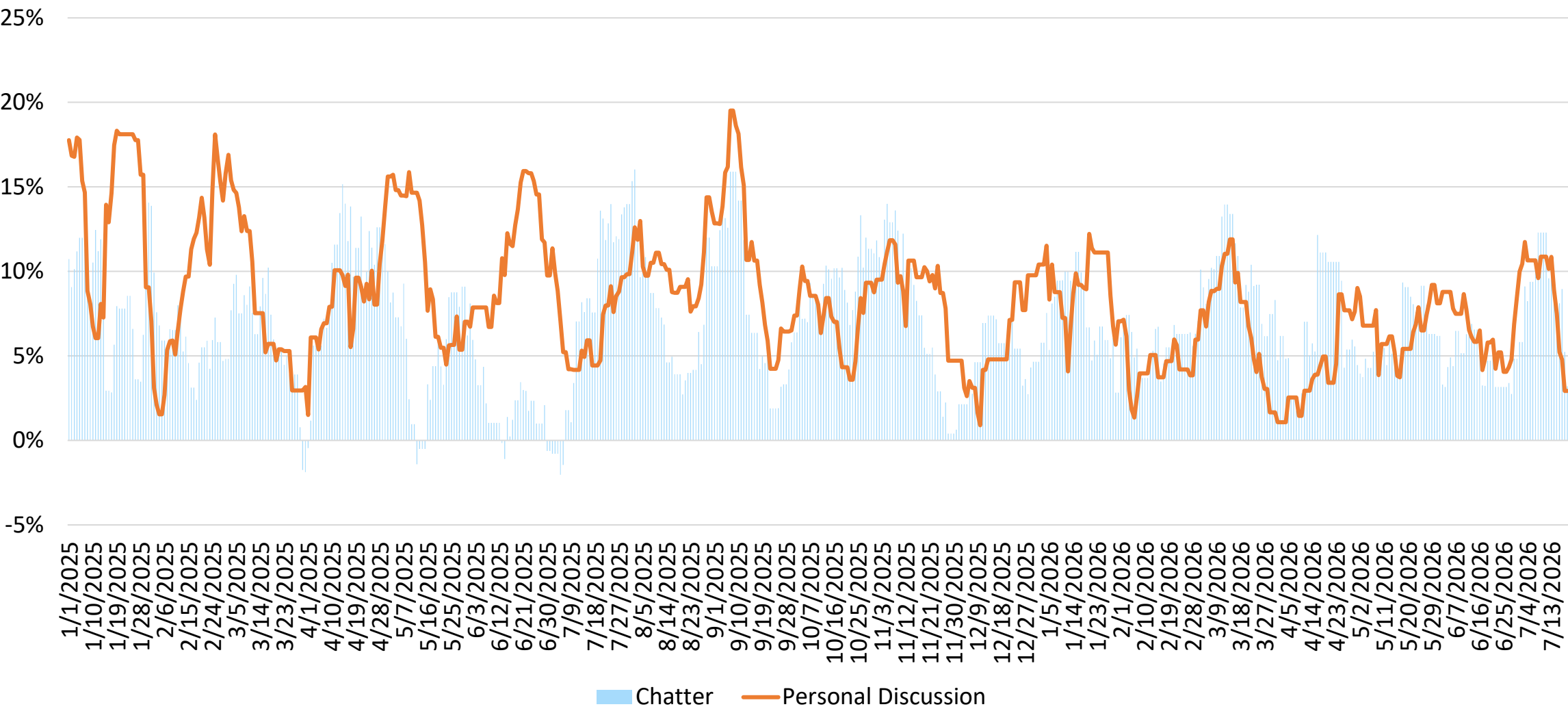
U.S. Two-Week Moving Average



Source: Vision Insights Data as of July 21, 2026

Kaua'i – Chatter (Net) and Personal Discussion

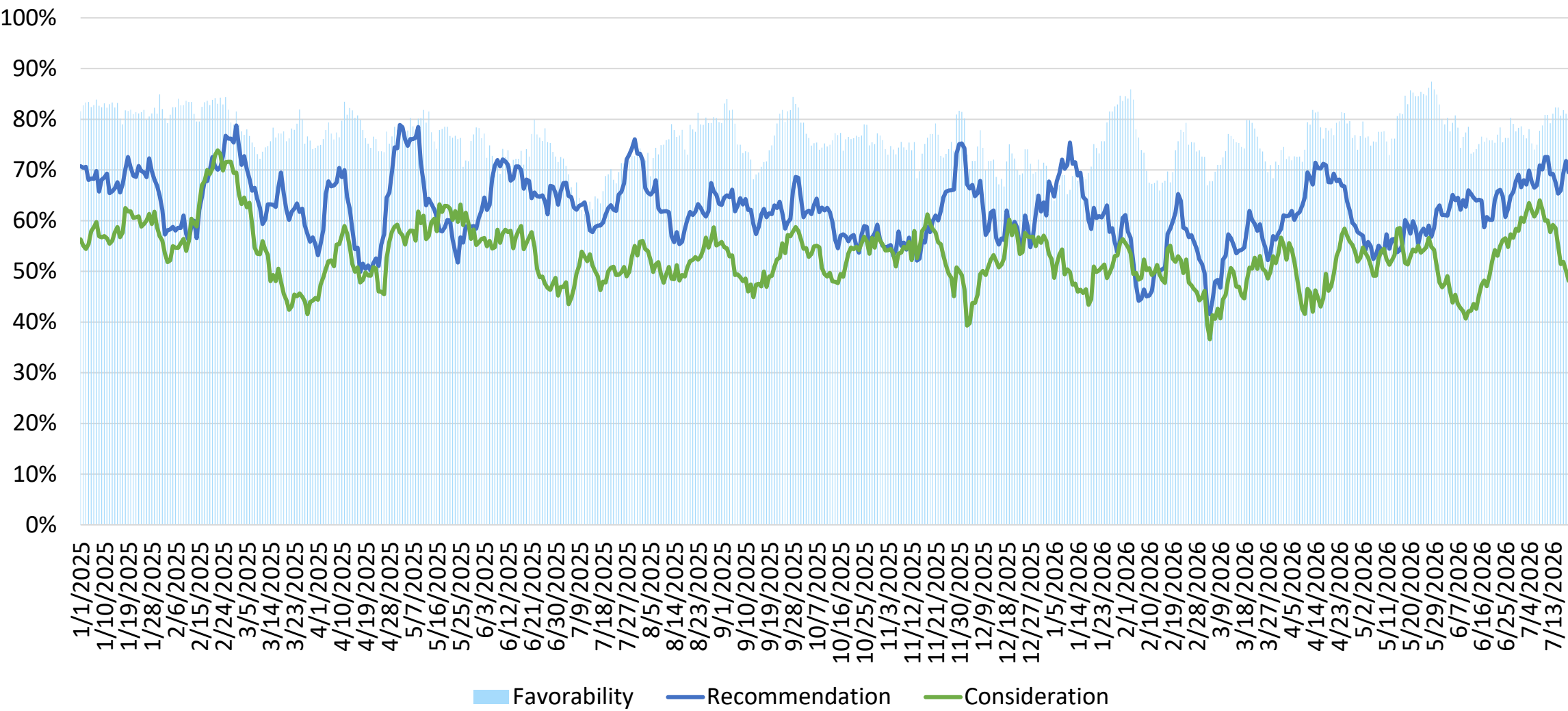
U.S. Two-Week Moving Average



Source: Vision Insights Data as of July 21, 2026

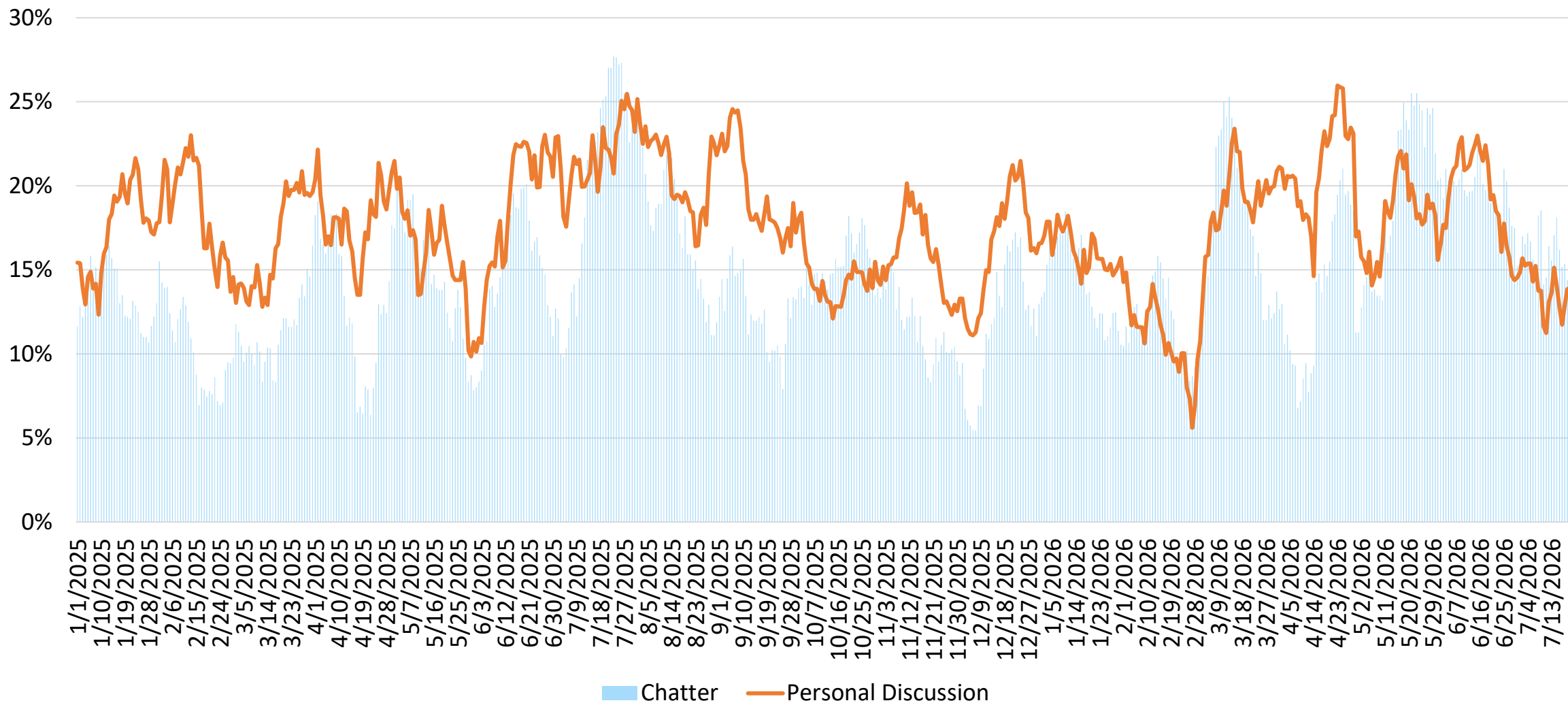
Kaua'i – Recommendation, Consideration and Favorability

U.S. Two-Week Moving Average



Source: Vision Insights Data as of July 21, 2026

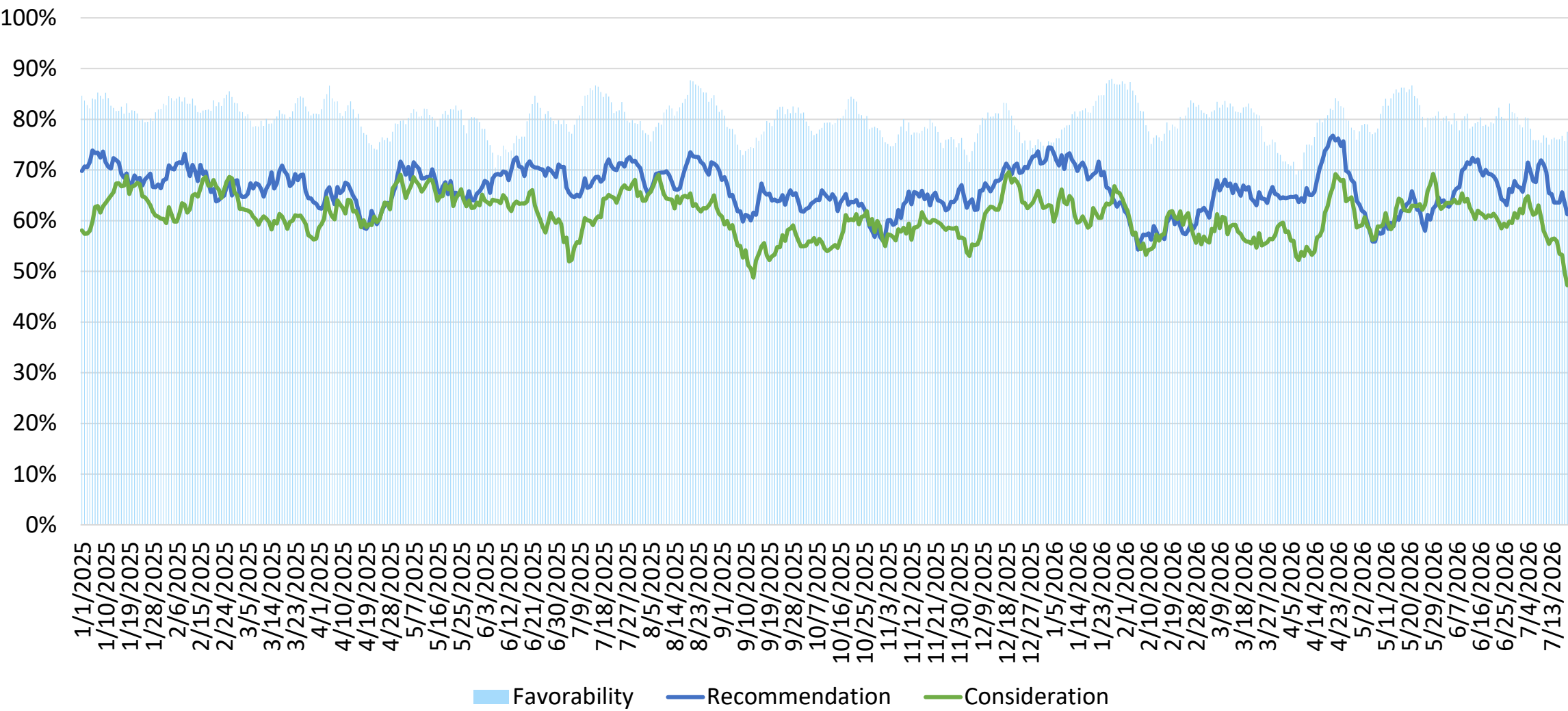
Hawai'i Island – Chatter (Net) and Personal Discussion U.S. Two-Week Moving Average



Source: Vision Insights Data as of July 21, 2026

Hawai'i Island – Recommendation, Consideration and Favorability

U.S. Two-Week Moving Average



Source: Vision Insights Data as of July 21, 2026

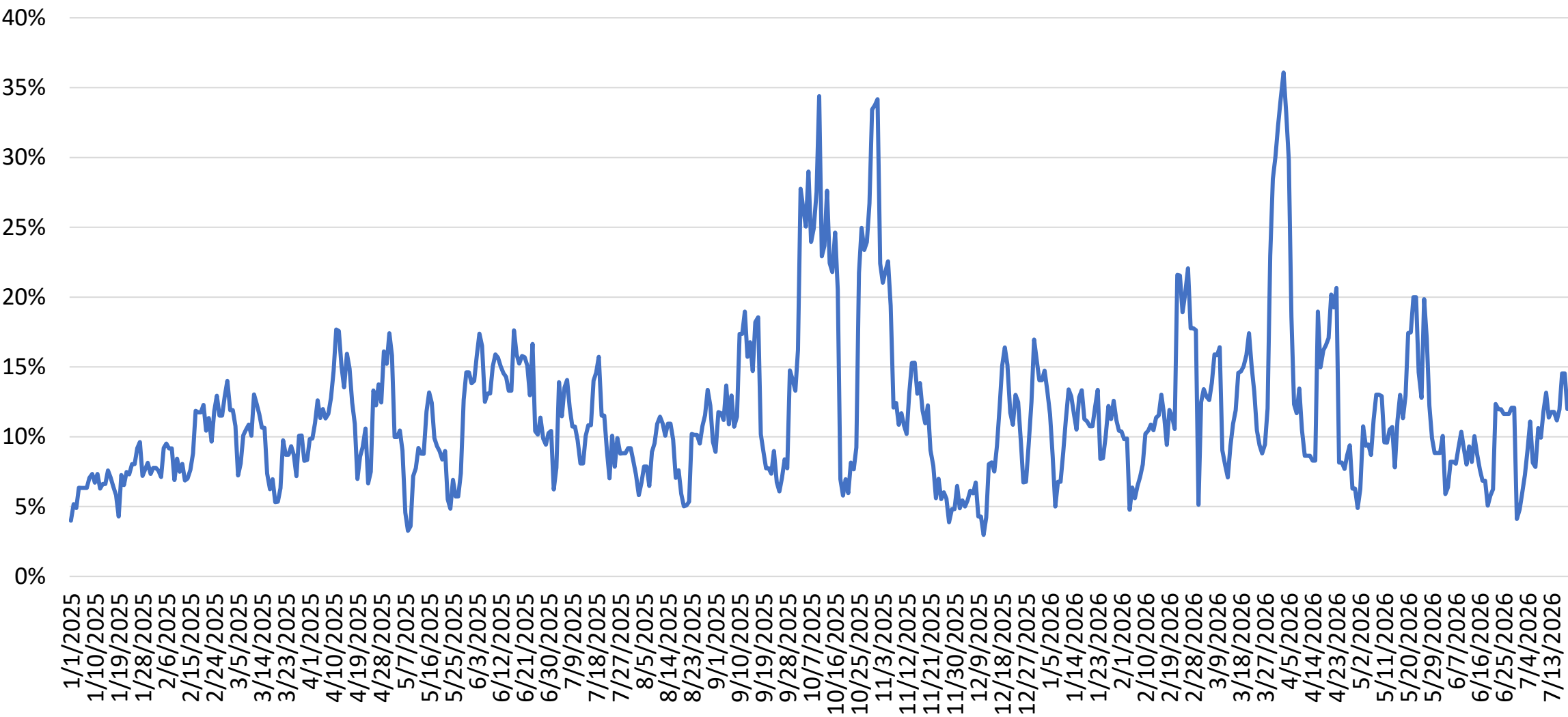


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Canada Responsible Travelers Segment

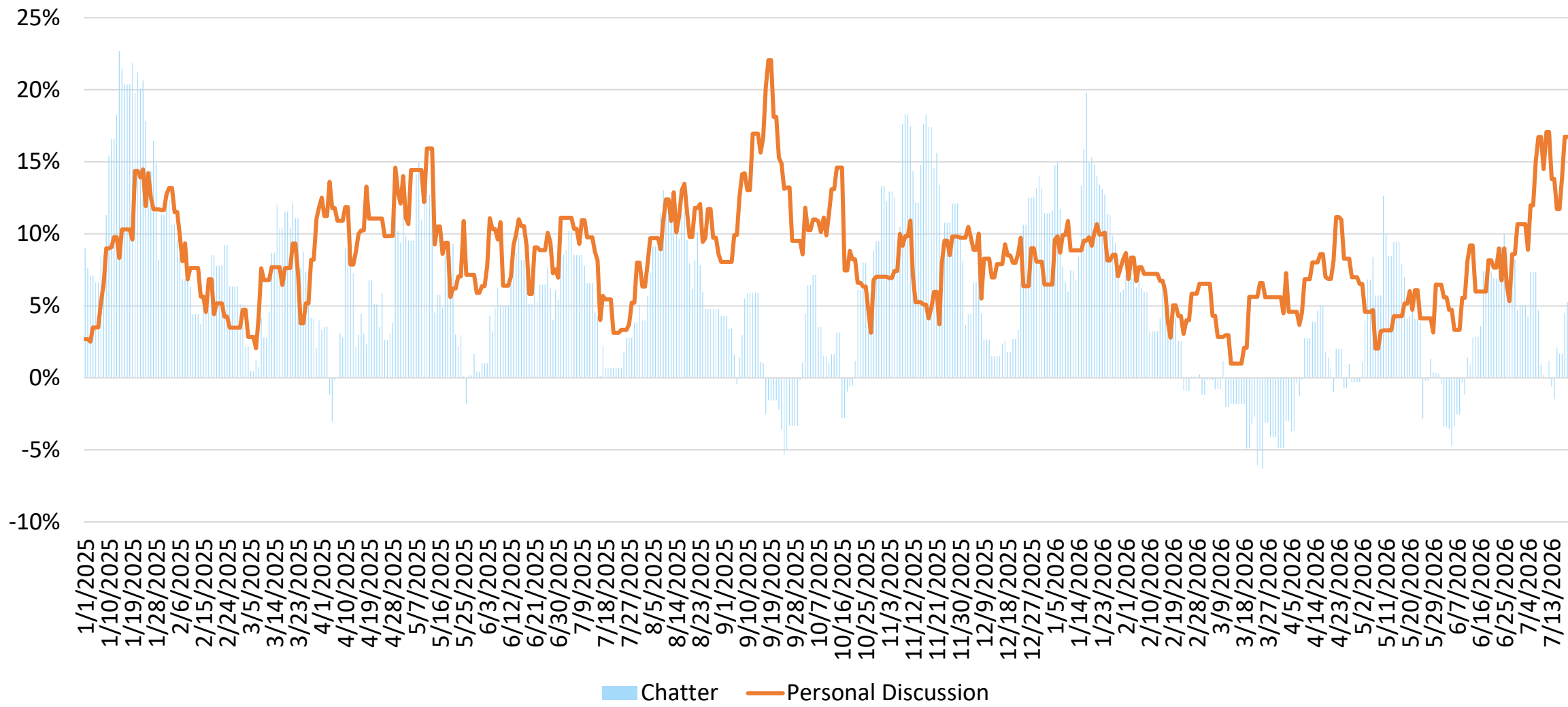


State of Hawai'i – Intent to Travel Canada One-Week Moving Average



Source: Vision Insights Data as of July 21, 2026

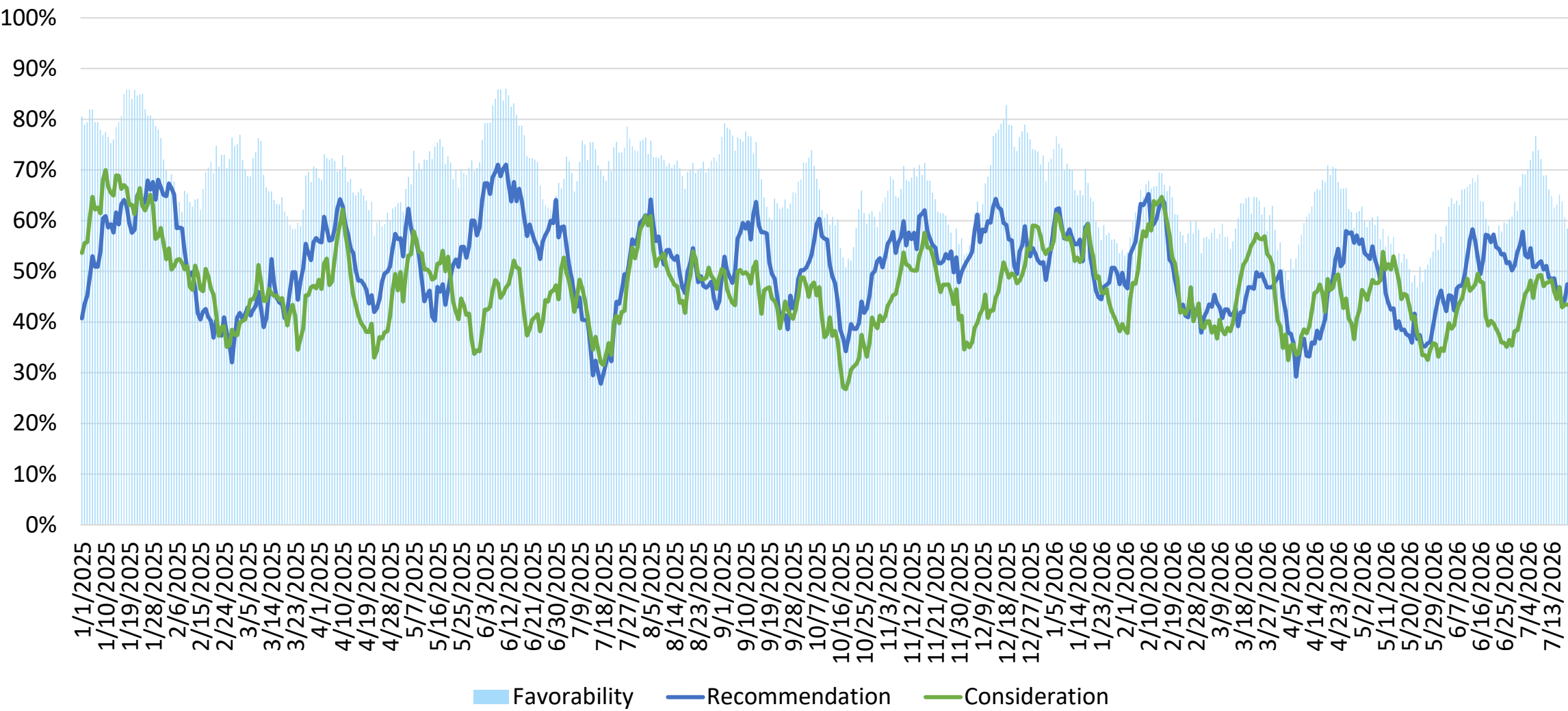
O‘ahu – Chatter (Net) and Personal Discussion Canada Two-Week Moving Average



Source: Vision Insights Data as of July 21, 2026

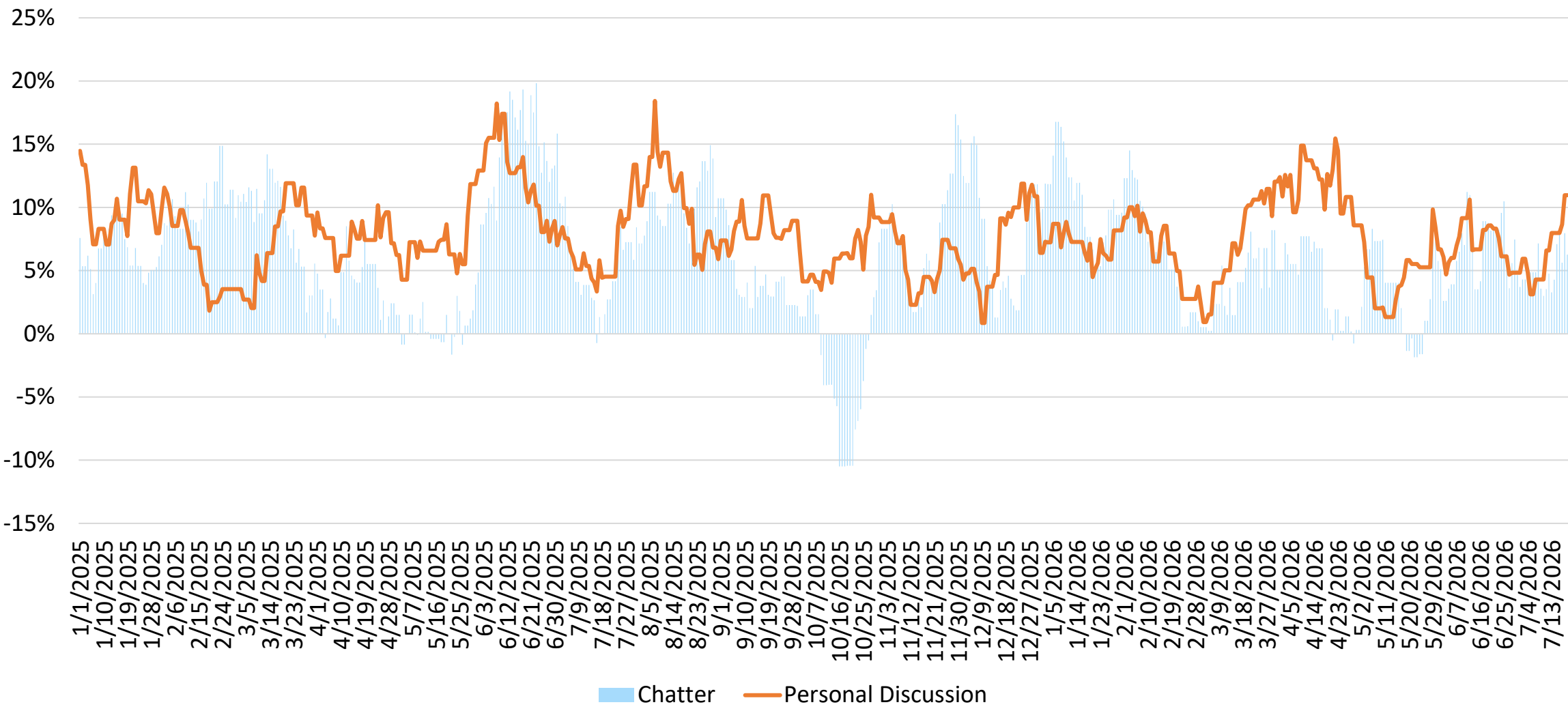
O‘ahu – Recommendation, Consideration and Favorability

Canada Two-Week Moving Average



Source: Vision Insights Data as of July 21, 2026

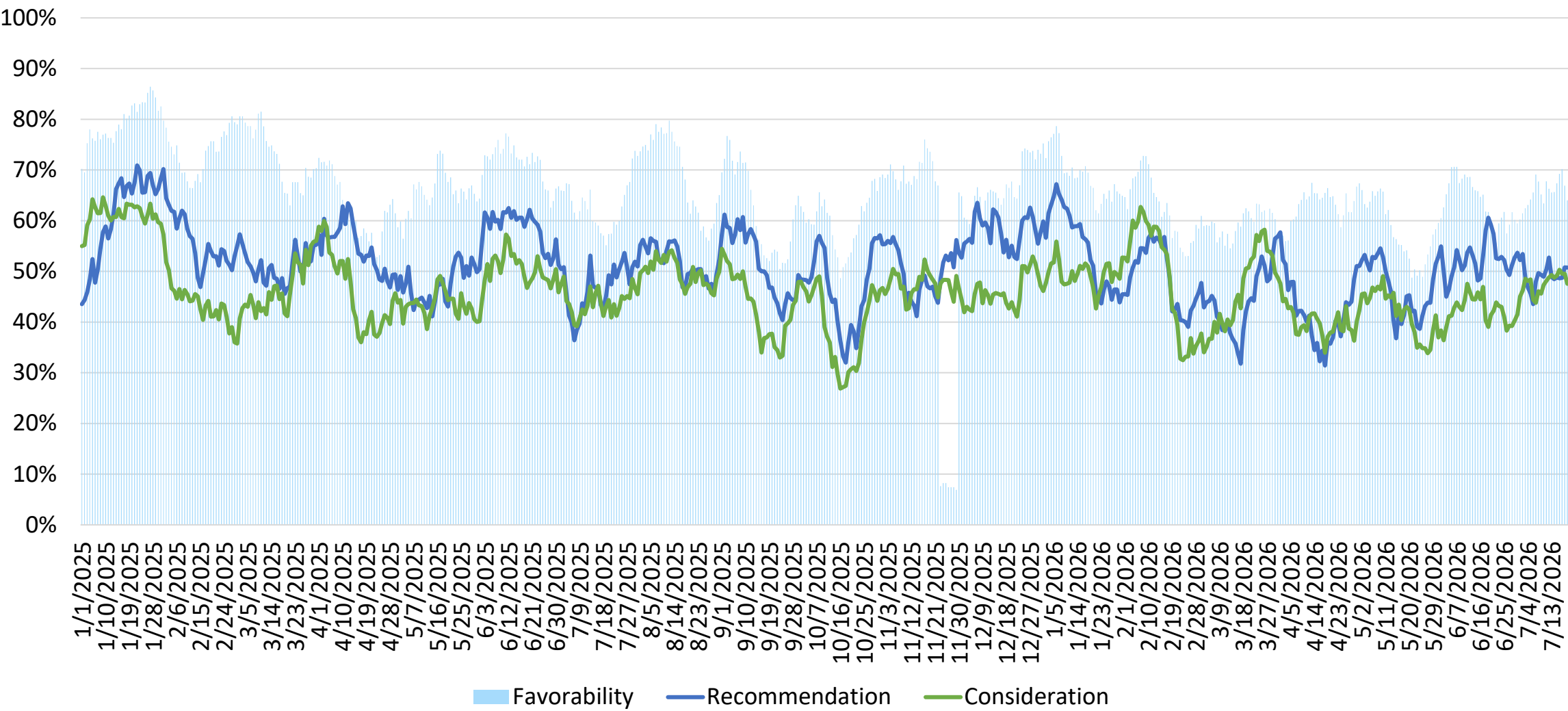
Maui – Chatter (Net) and Personal Discussion Canada Two-Week Moving Average



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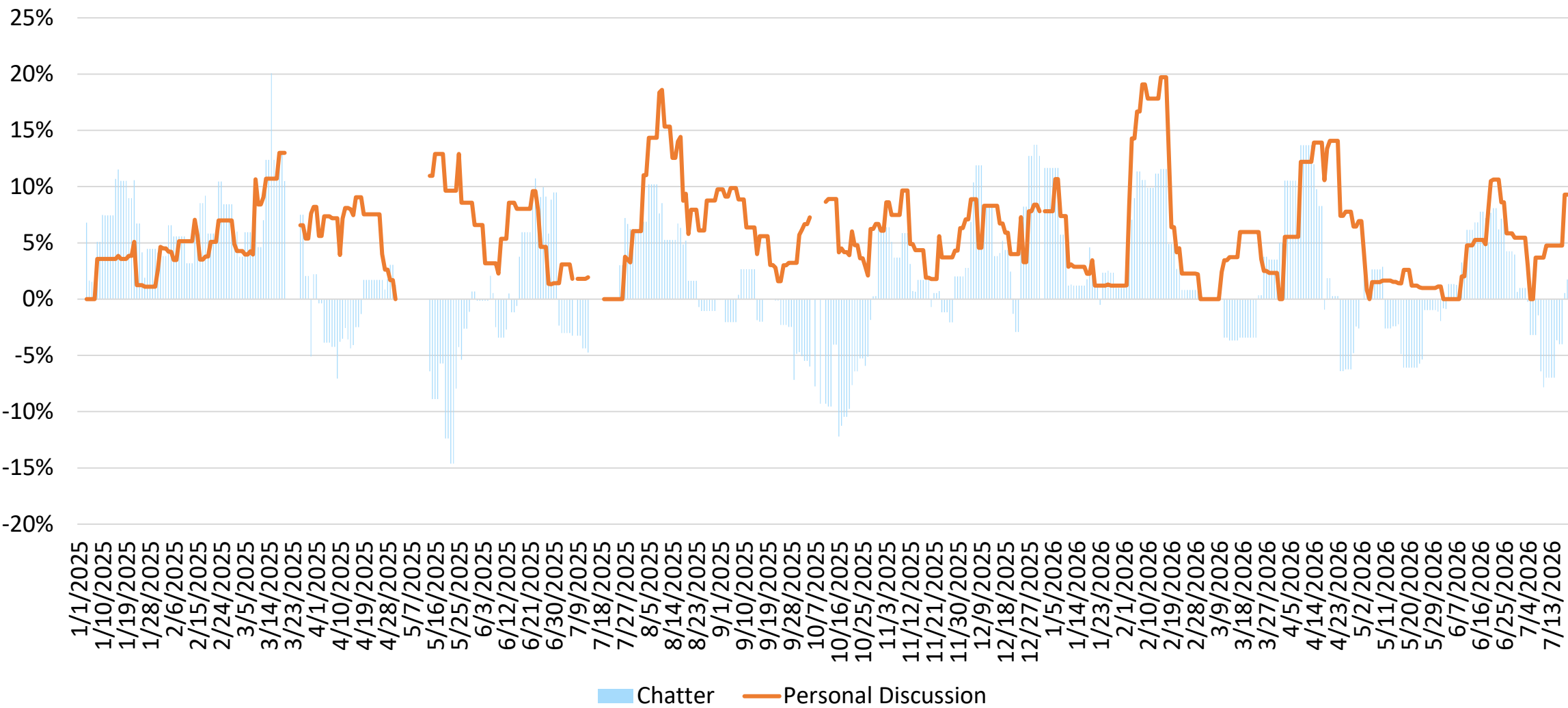
Maui – Recommendation, Consideration and Favorability

Canada Two-Week Moving Average



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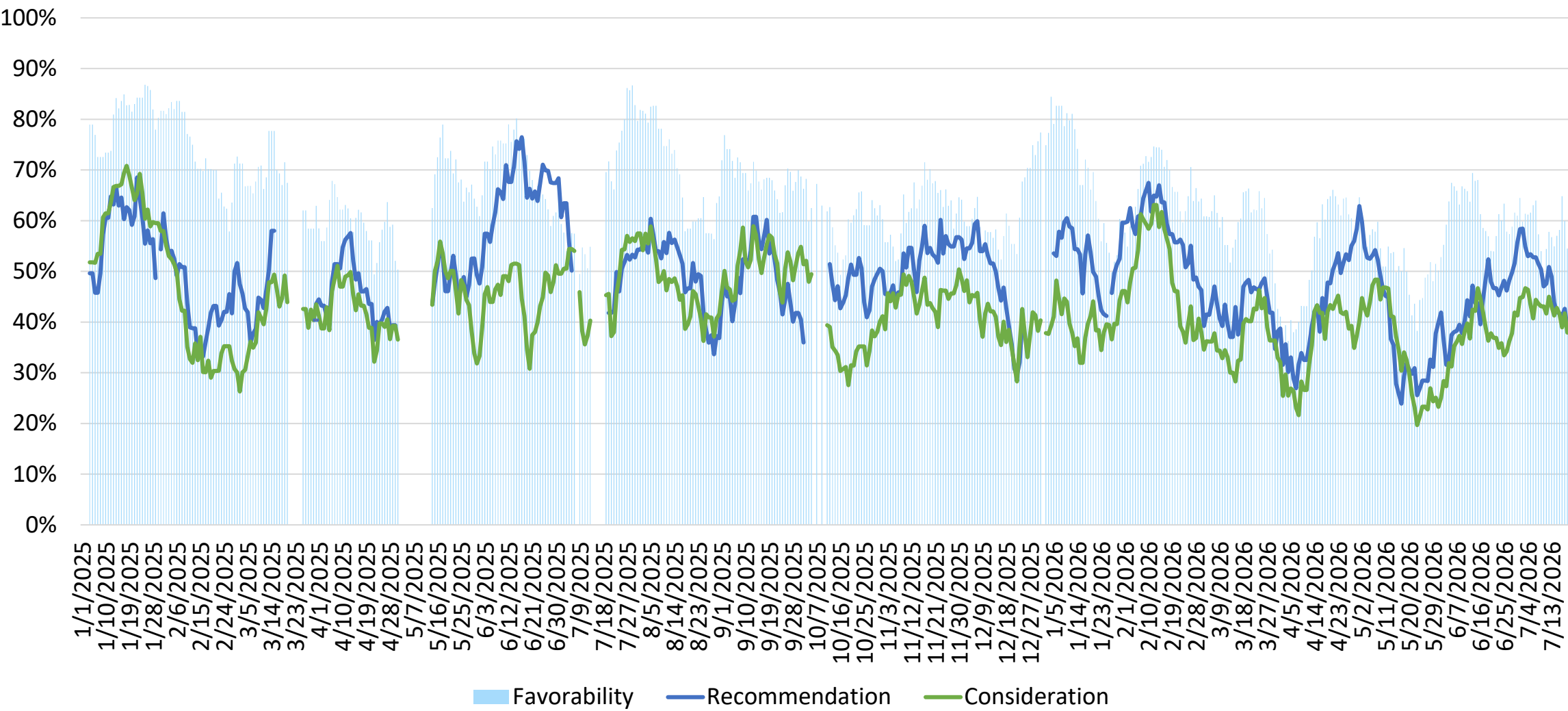
Kaua'i – Chatter (Net) and Personal Discussion Canada Two-Week Moving Average



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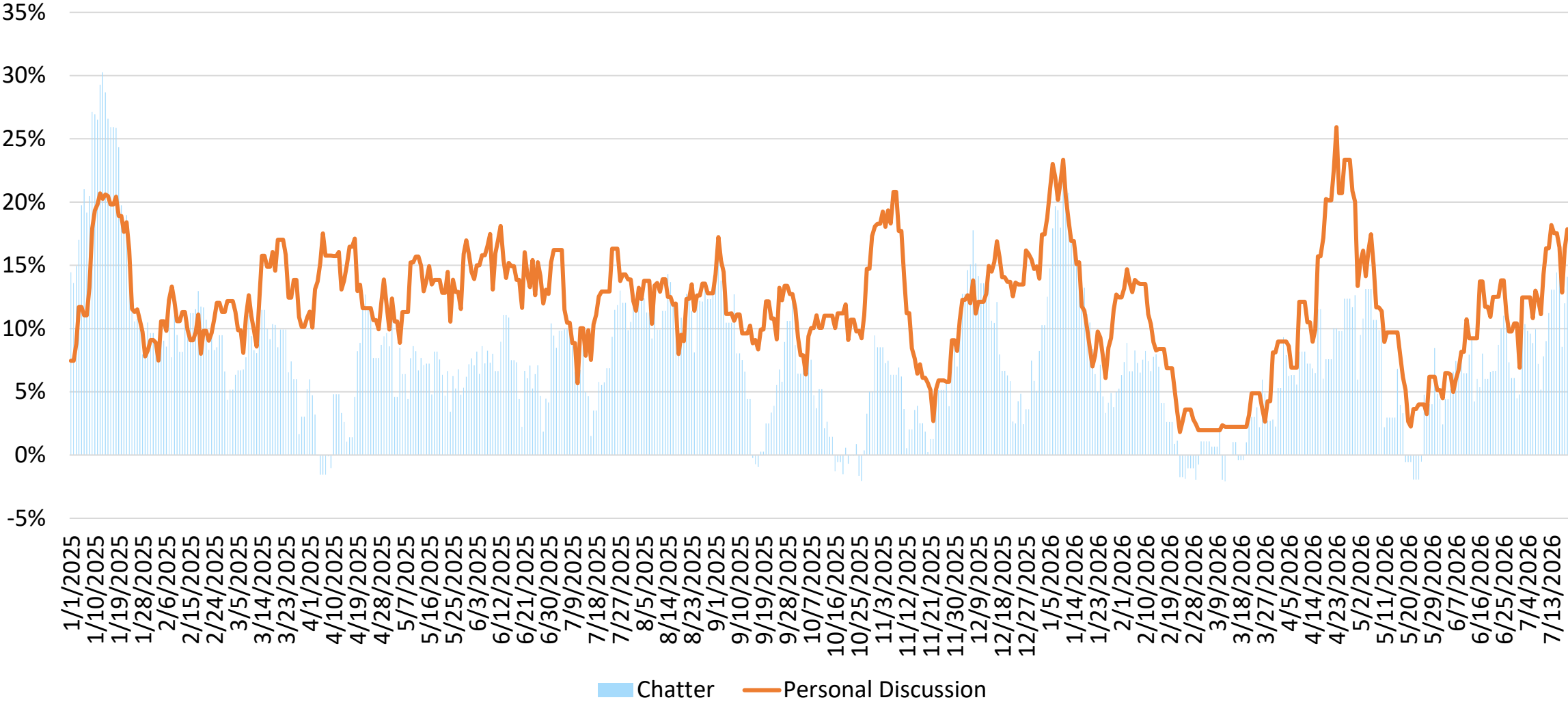
Kaua'i – Recommendation, Consideration and Favorability

Canada Two-Week Moving Average



Source: Vision Insights Data as of July 21, 2026

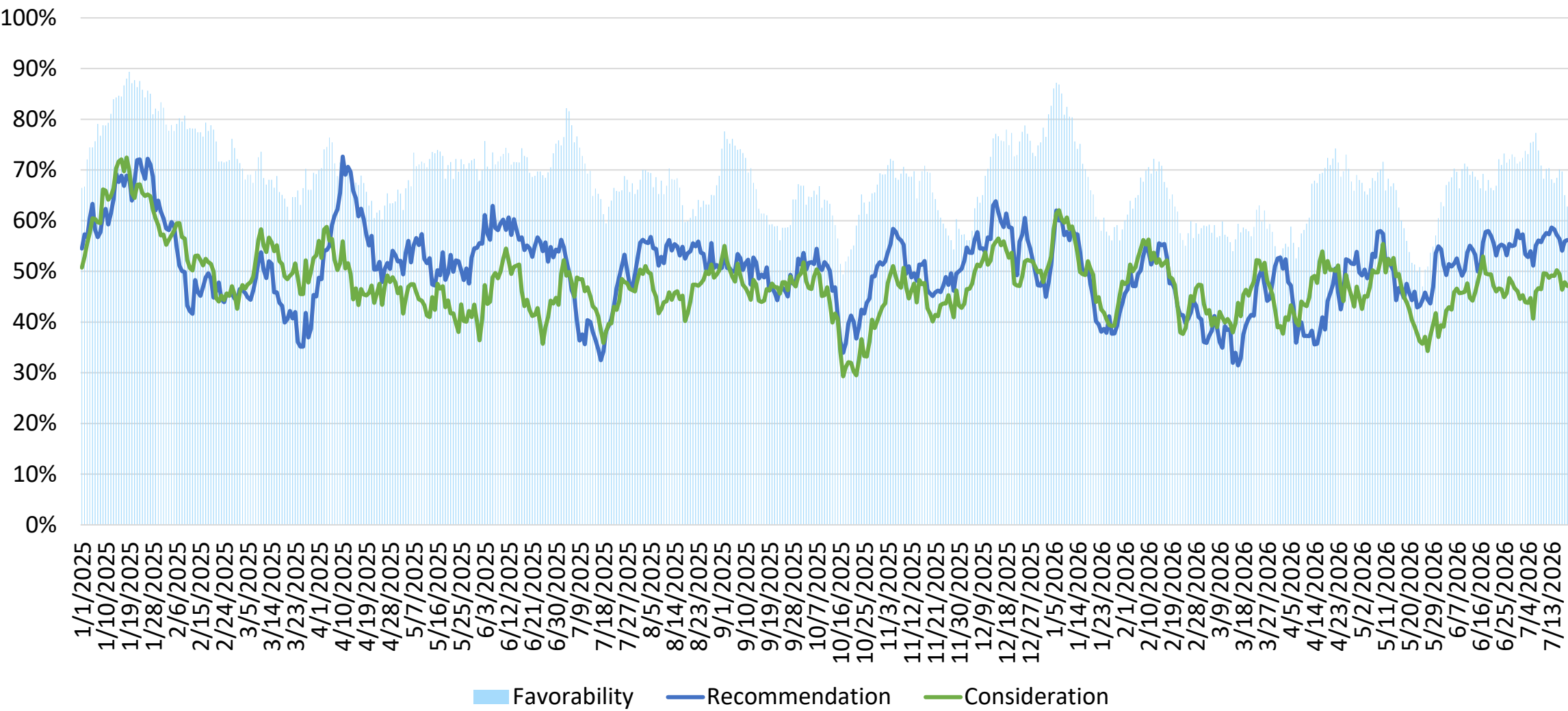
Hawai'i Island – Chatter (Net) and Personal Discussion Canada Two-Week Moving Average



Source: Vision Insights Data as of July 21, 2026

Hawai'i Island – Recommendation, Consideration and Favorability

Canada Two-Week Moving Average



Source: Vision Insights Data as of July 21, 2026

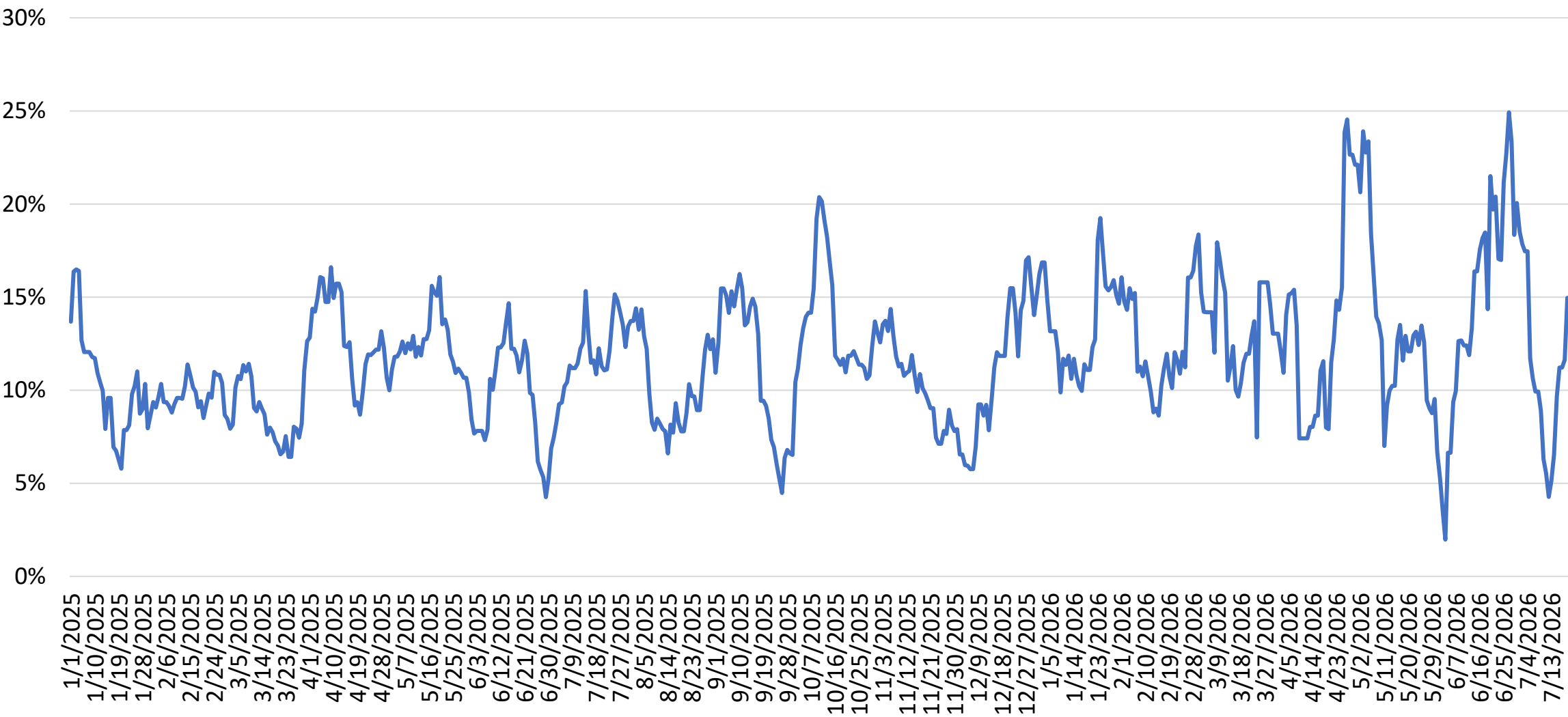


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South Korea Responsible Travelers Segment

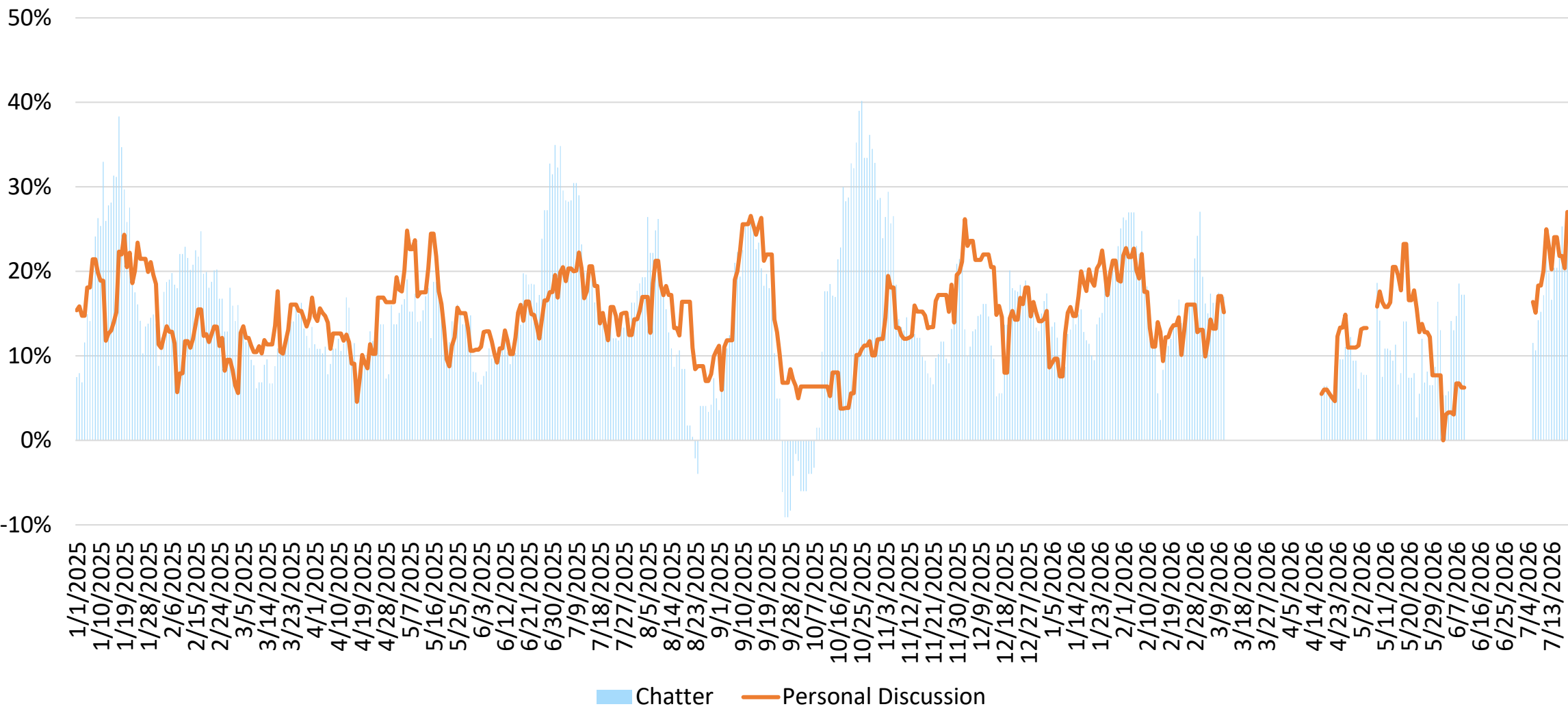


State of Hawai'i – Intent to Travel South Korea Two-Week Moving Average



Source: Vision Insights Data as of July 21, 2026

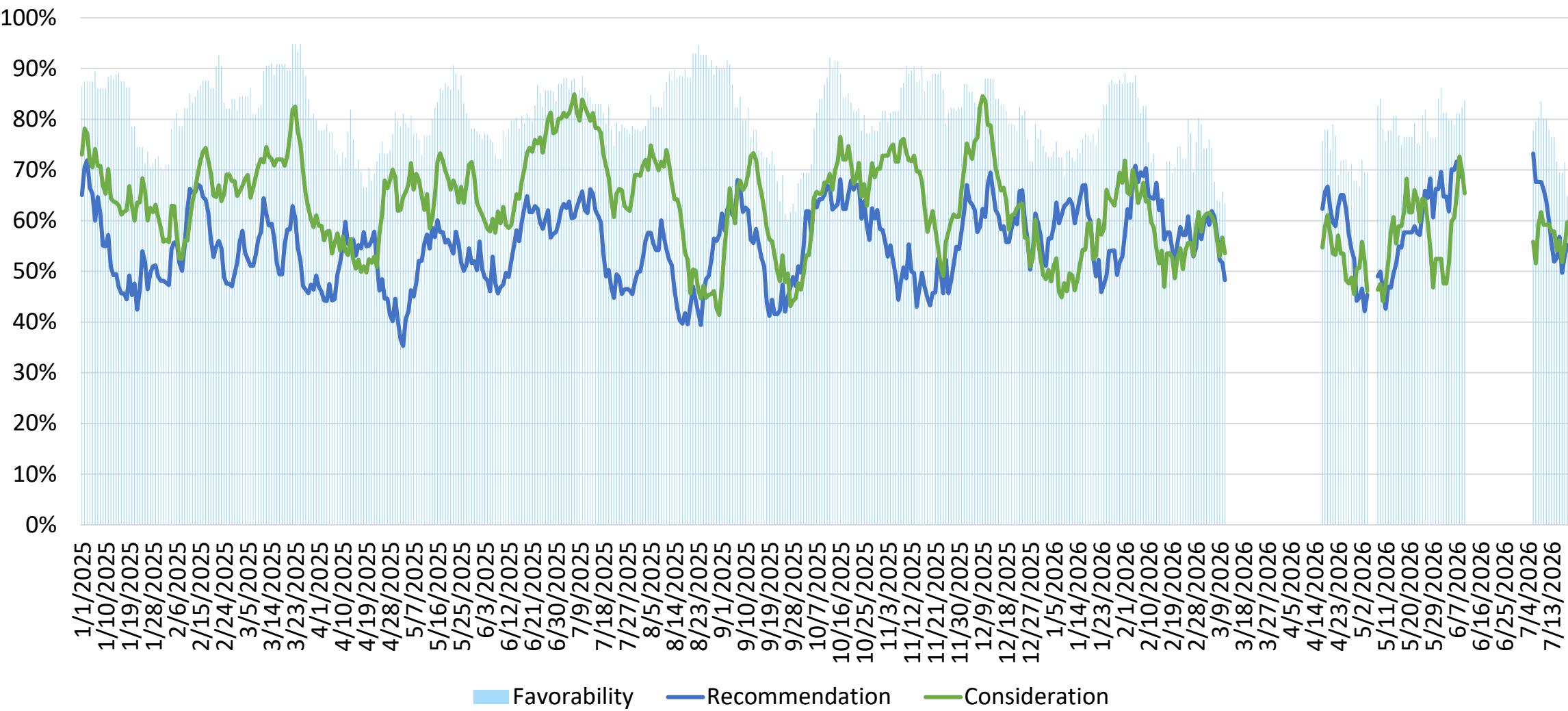
O‘ahu – Chatter (Net) and Personal Discussion South Korea Two-Week Moving Average



Source: Vision Insights Data as of July 21, 2026

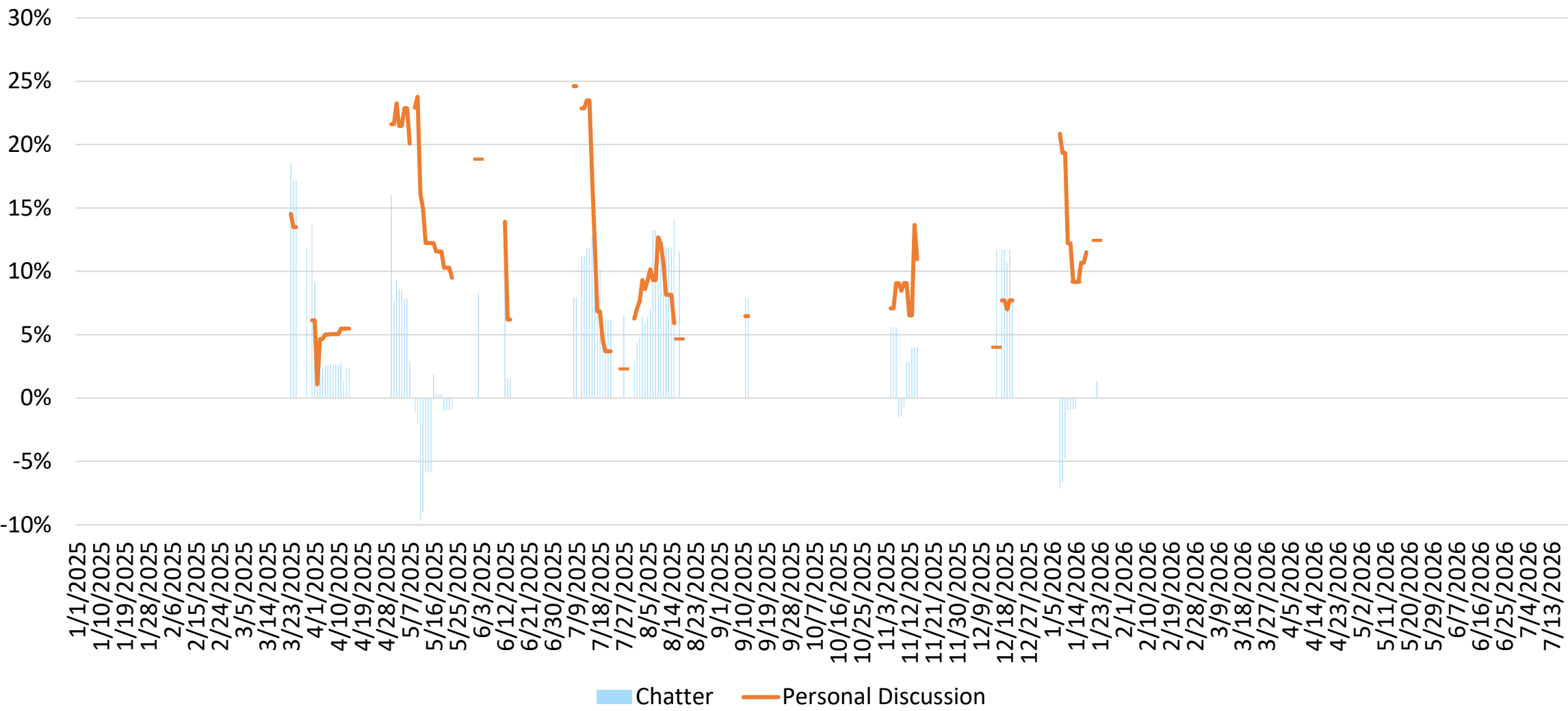
O‘ahu – Recommendation, Consideration and Favorability

South Korea Two-Week Moving Average



Source: Vision Insights Data as of July 21, 2026

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

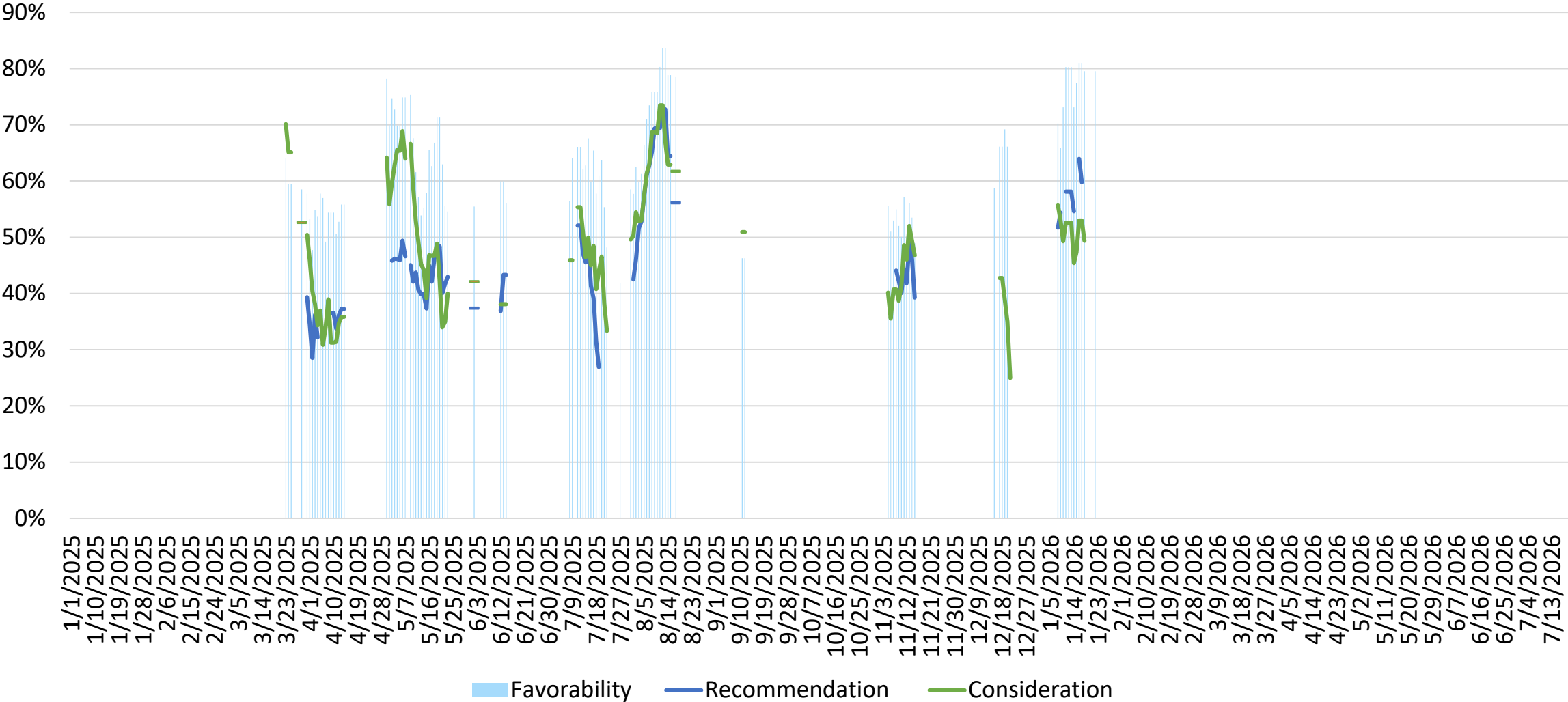


Source: Vision Insights Data as of July 21, 2026

*Low sample size

Maui – Recommendation, Consideration and Favorability

South Korea Two-Week Moving Average



Source: Vision Insights Data as of July 21, 2026

*Low sample size

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

No data available

Source: Vision Insights Data as of July 21, 2026

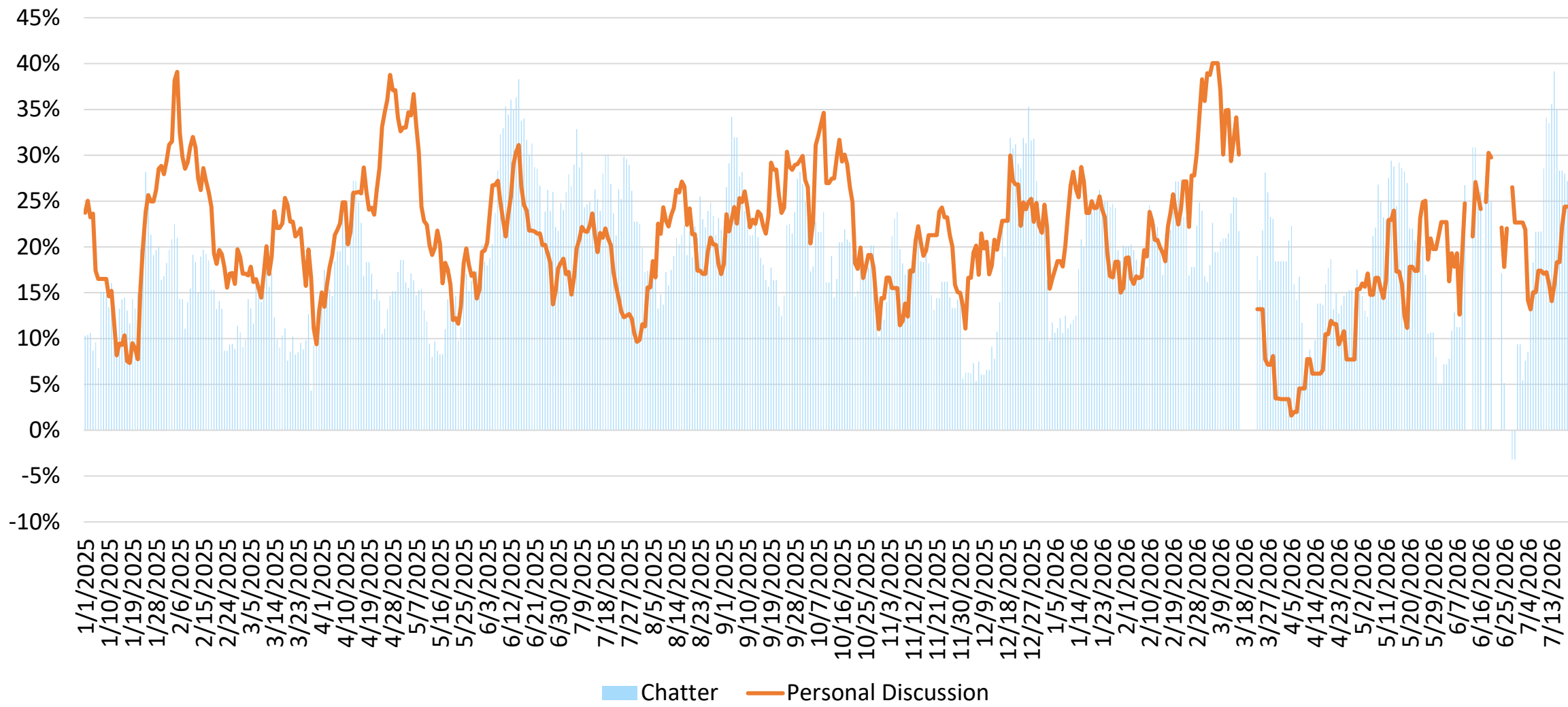
Kaua'i – Recommendation, Consideration and Favorability

South Korea Two-Week Moving Average

No data available

Source: Vision Insights Data as of July 21, 2026

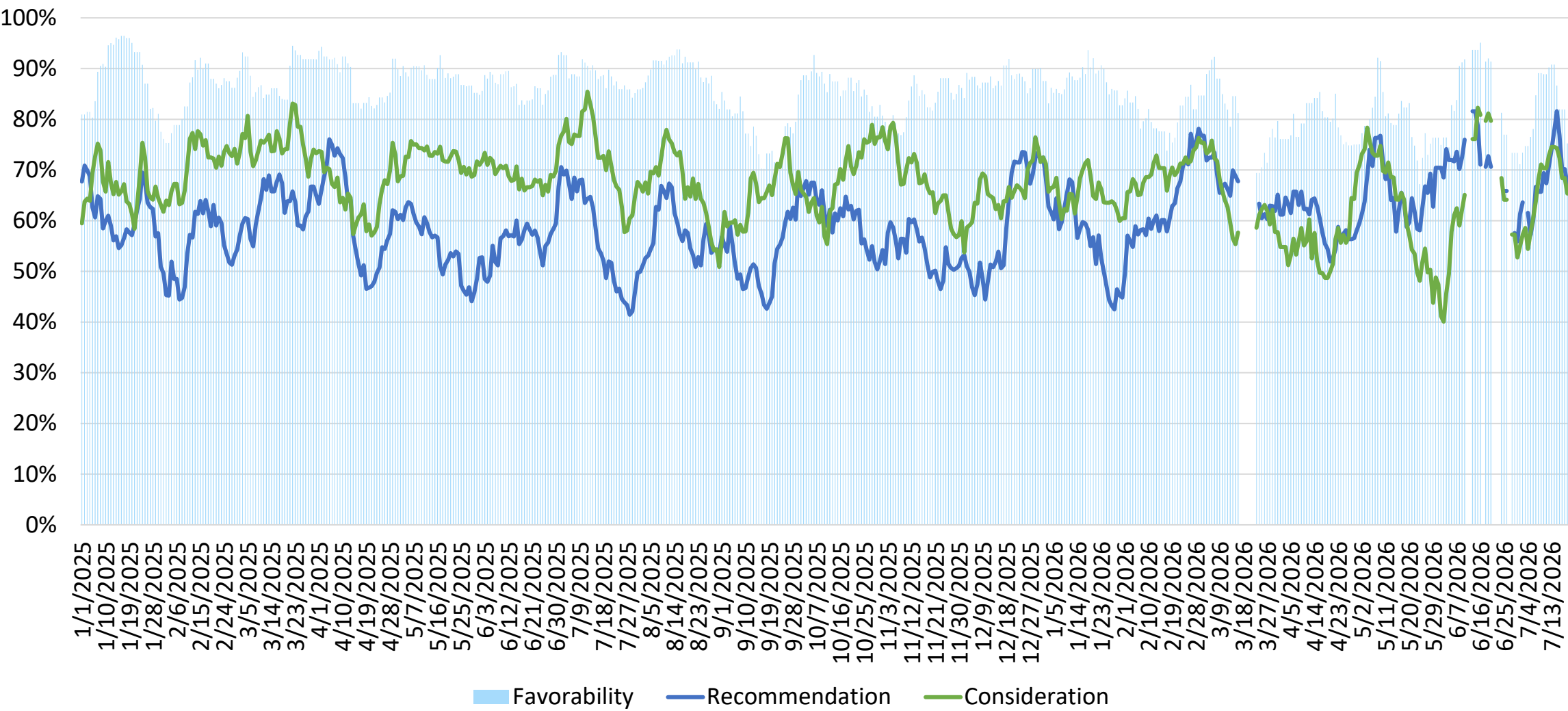
Hawai'i Island – Chatter (Net) and Personal Discussion South Korea Two-Week Moving Average



Source: Vision Insights Data as of July 21, 2026

Hawai'i Island – Recommendation, Consideration and Favorability

South Korea Two-Week Moving Average



Source: Vision Insights Data as of July 21, 2026

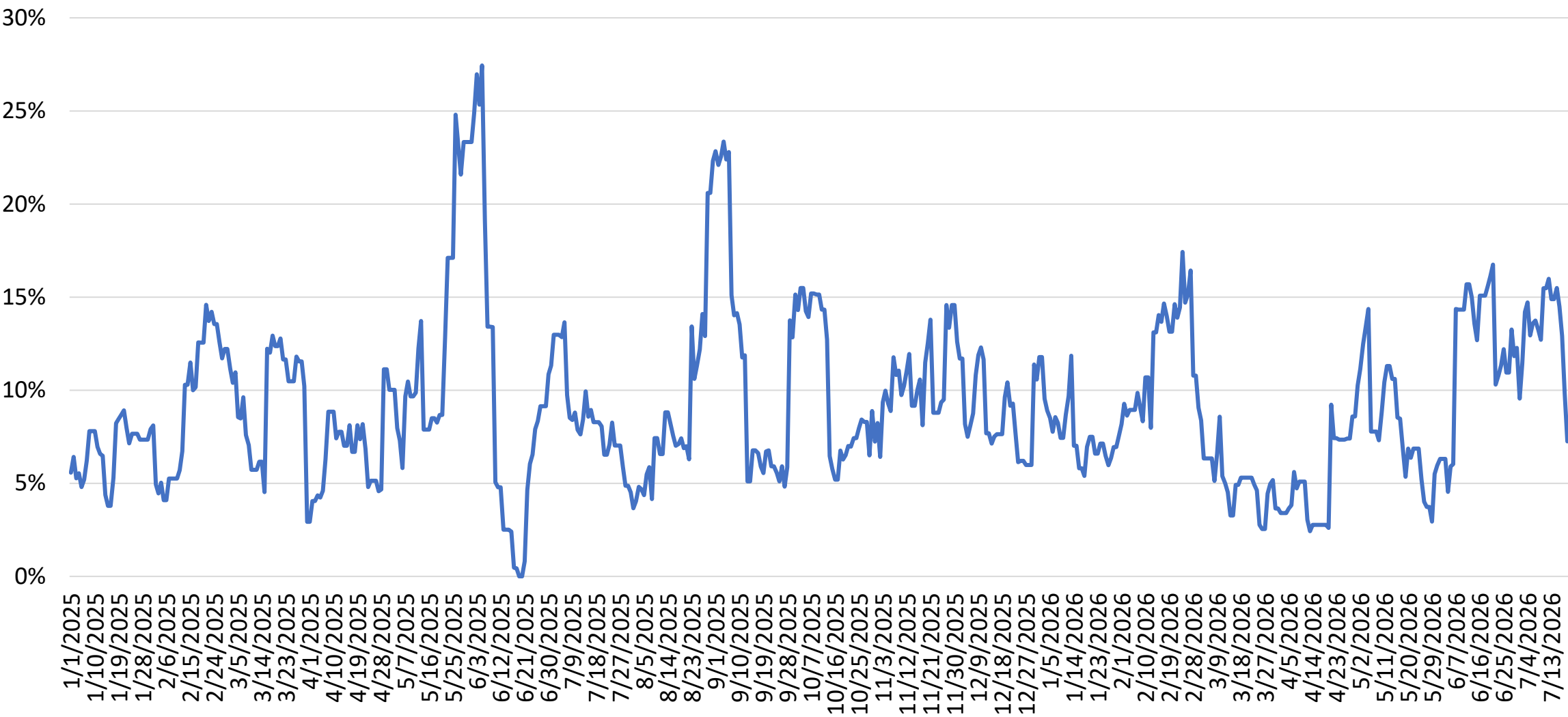


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Australia Responsible Travelers Segment

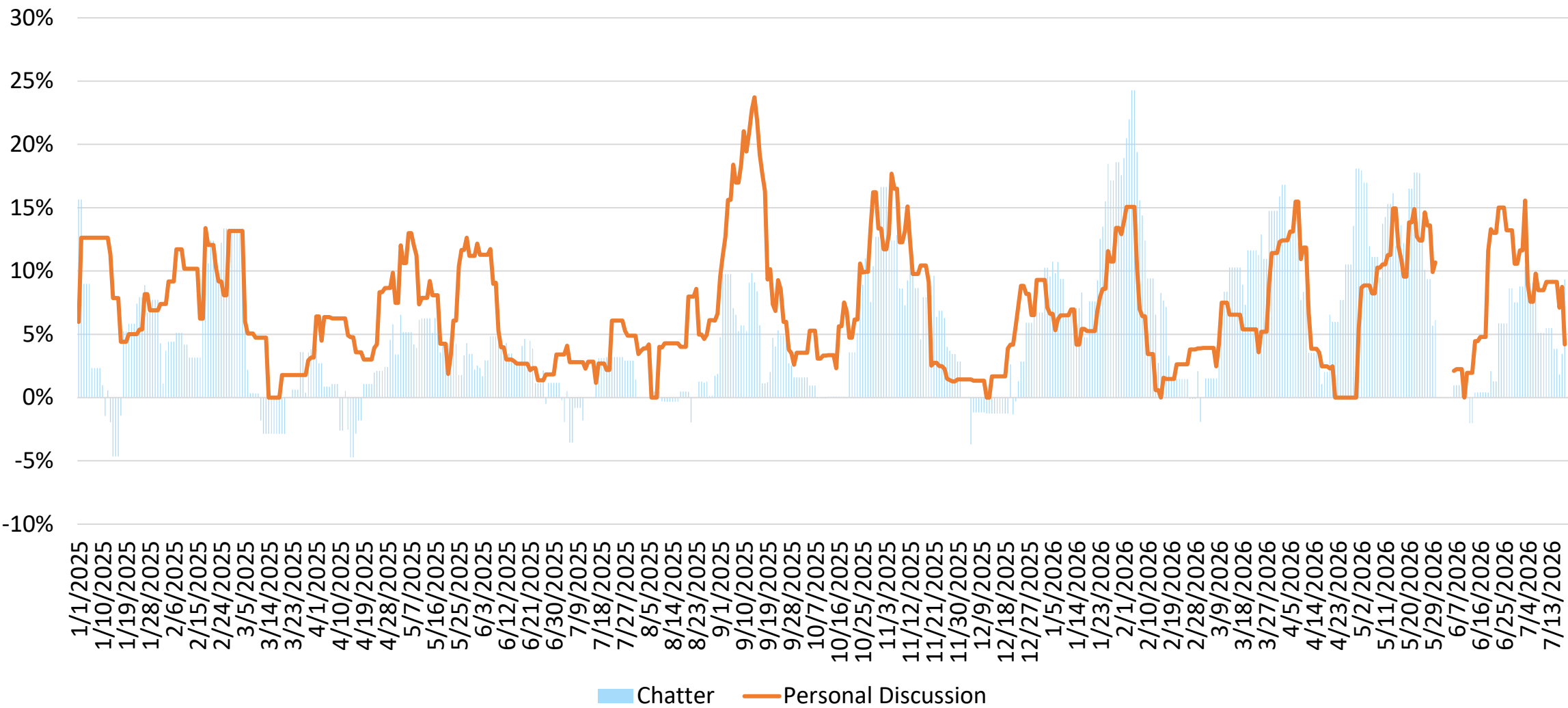


State of Hawai'i – Intent to Travel Australia Two-Week Moving Average



Source: Vision Insights Data as of July 21, 2026

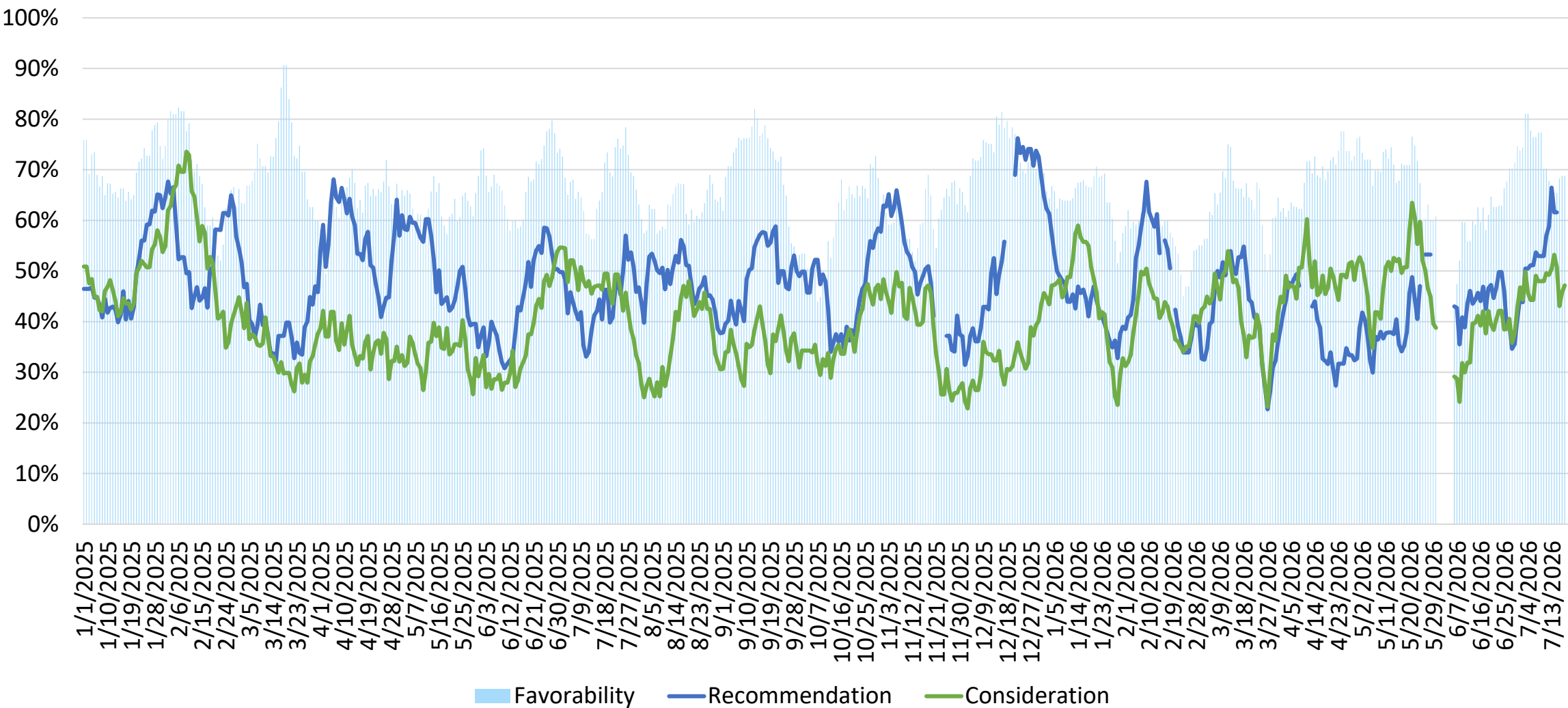
O‘ahu – Chatter (Net) and Personal Discussion Australia Two-Week Moving Average



Source: Vision Insights Data as of July 21, 2026

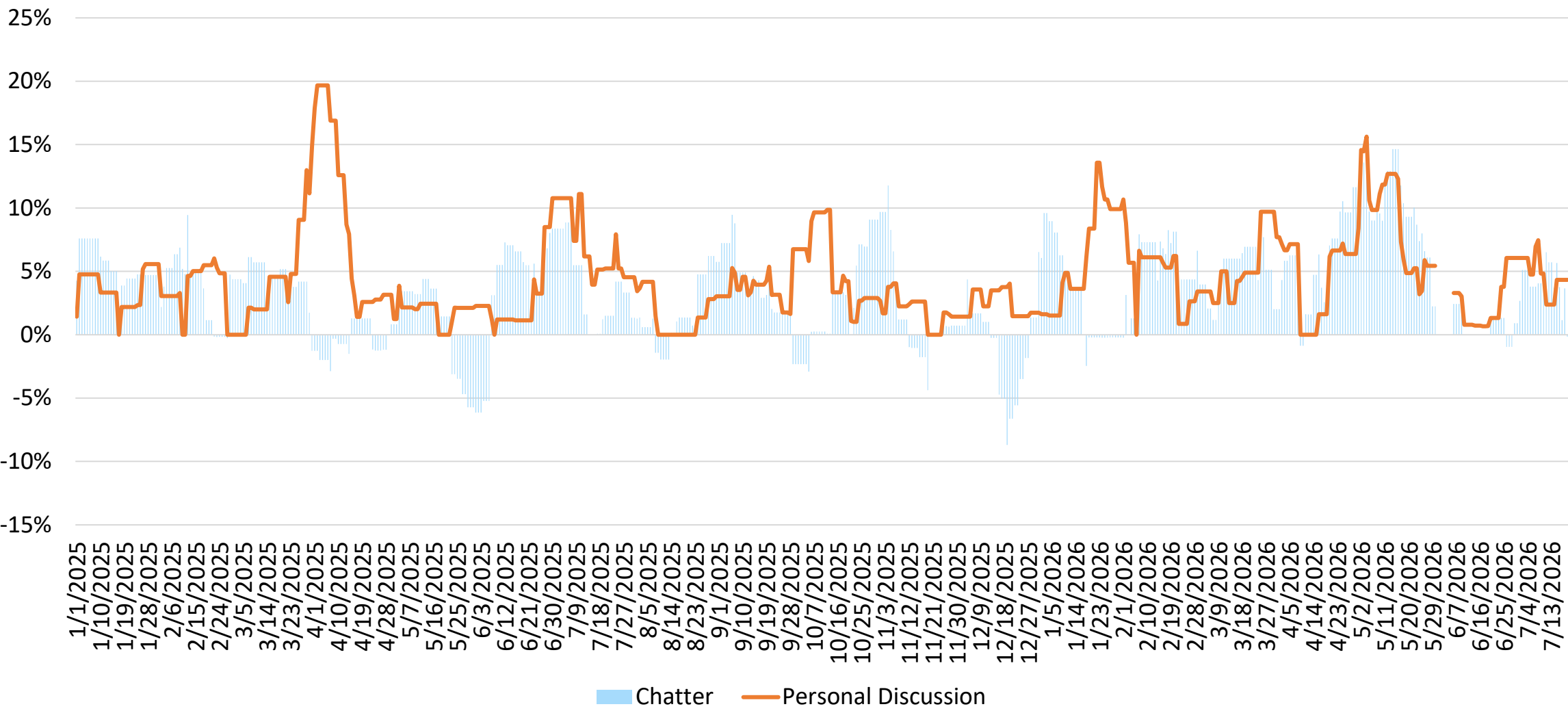
O‘ahu – Recommendation, Consideration and Favorability

Australia Two-Week Moving Average



Source: Vision Insights Data as of July 21, 2026

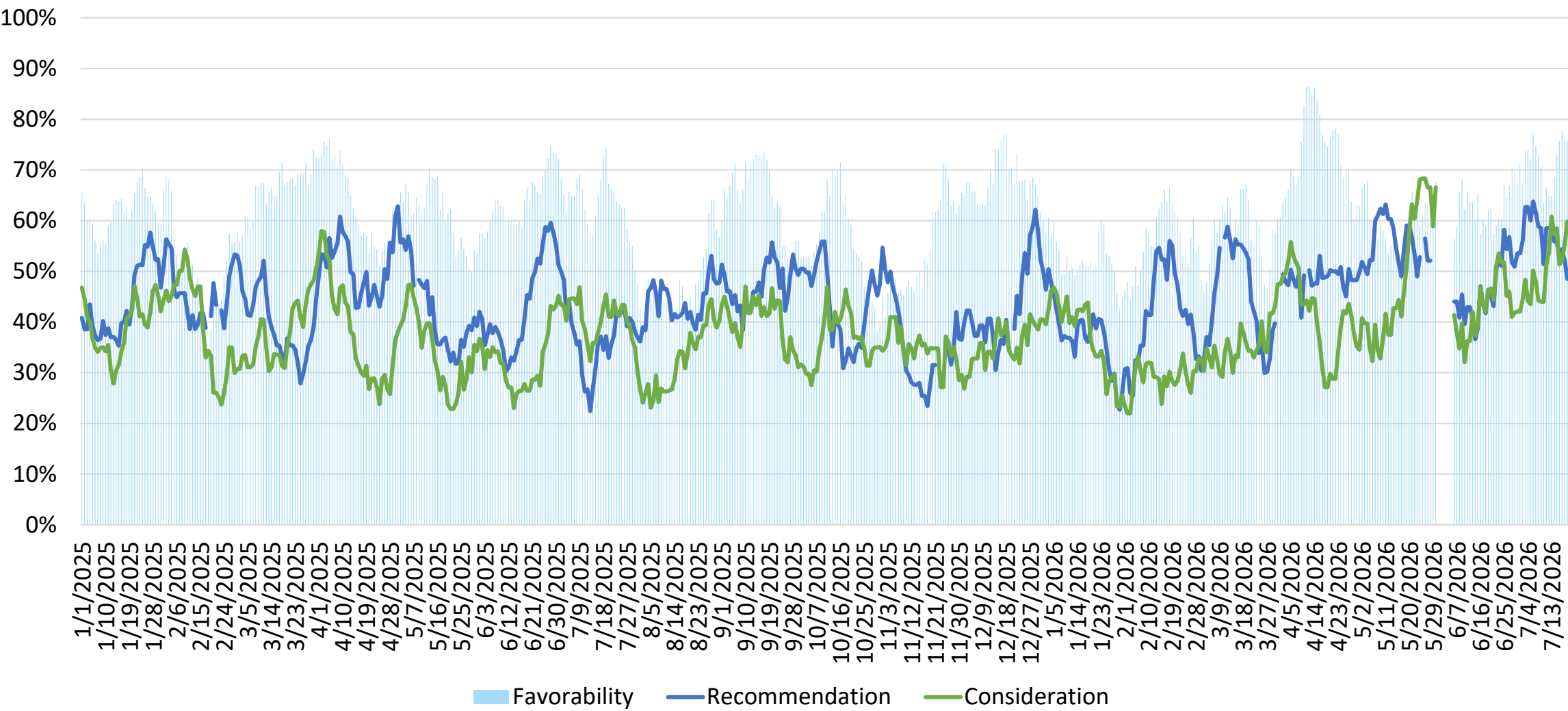
Maui – Chatter (Net) and Personal Discussion Australia Two-Week Moving Average



Source: Vision Insights Data as of July 21, 2026

Maui – Recommendation, Consideration and Favorability

Australia Two-Week Moving Average



Source: Vision Insights Data as of July 21, 2026

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

No data available

Source: Vision Insights Data as of July 21, 2026

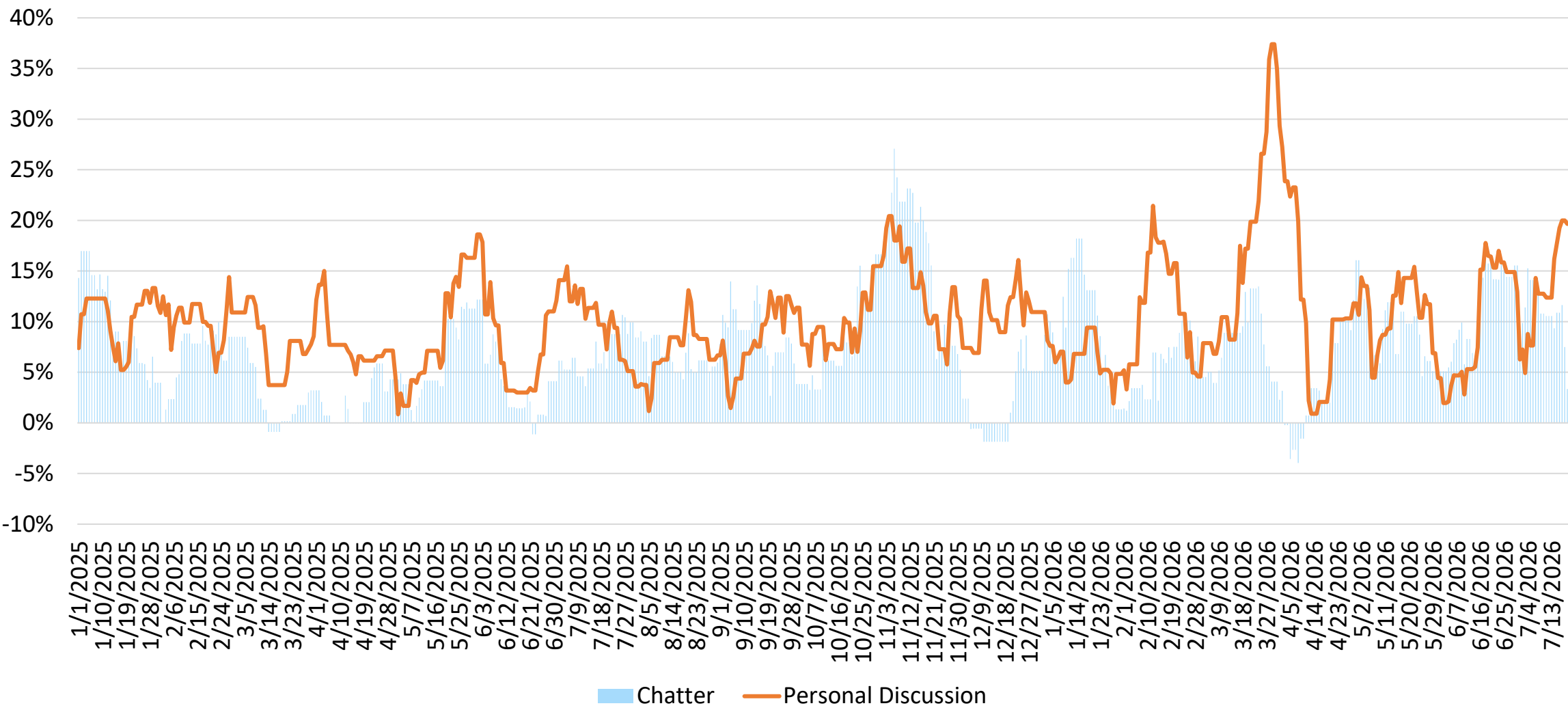
Kaua'i – Recommendation, Consideration and Favorability

Australia Two-Week Moving Average

No data available

Source: Vision Insights Data as of July 21, 2026

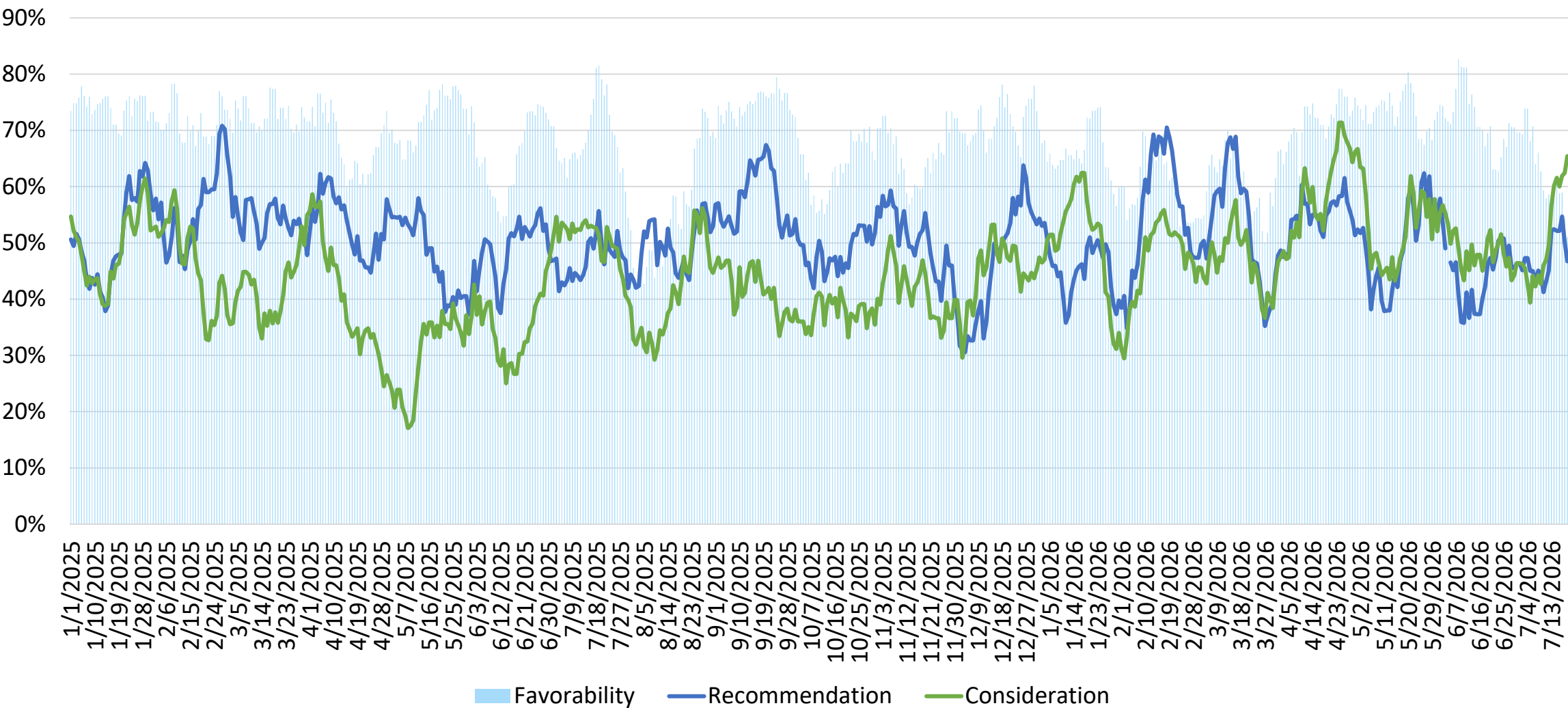
Hawai'i Island – Chatter (Net) and Personal Discussion Australia Two-Week Moving Average



Source: Vision Insights Data as of July 21, 2026

Hawai'i Island – Recommendation, Consideration and Favorability

Australia Two-Week Moving Average



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