



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

Vision Insights

Destination Brand Health Trends

January 14, 2025



Vision Insights Syndicated Survey

- DBEDT subscribes to Vision Insight's Brand Health and Profiles databases for the United States (U.S.), Canada, Japan, Australia, and Korea
- Consumers are surveyed each day
- Data reflects two-week moving average except for the intent to travel metric to any Hawaiian Island, which reflects one-week moving average
- DBEDT receives access to new data each week for daily brand health tracking metrics – media-focused, brand health, purchase/intent, and consumer status

Brand Health Metrics

- **Destination Awareness:** Percentage of people that are aware of a destination
- **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 2 weeks
- **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)
- **Intent to Travel:** Percentage of people who intend to travel to a destination

Destinations

- Respondents are asked about:
 - State of Hawai‘i
 - O‘ahu
 - Maui
 - Lāna‘i
 - Moloka‘i
 - Kaua‘i
 - Hawai‘i Island
- Selecting State of Hawai‘i indicates respondents’ awareness/chatter/consideration/favorability for the overall Hawai‘i brand (the concept of a beautiful place called “Hawai‘i”) and lack of familiarity with individual islands

2023-2025 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

January 13, 2025 – Governor Josh Green announces the "Aloha for L.A." program in wake of the L.A. wildfires

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

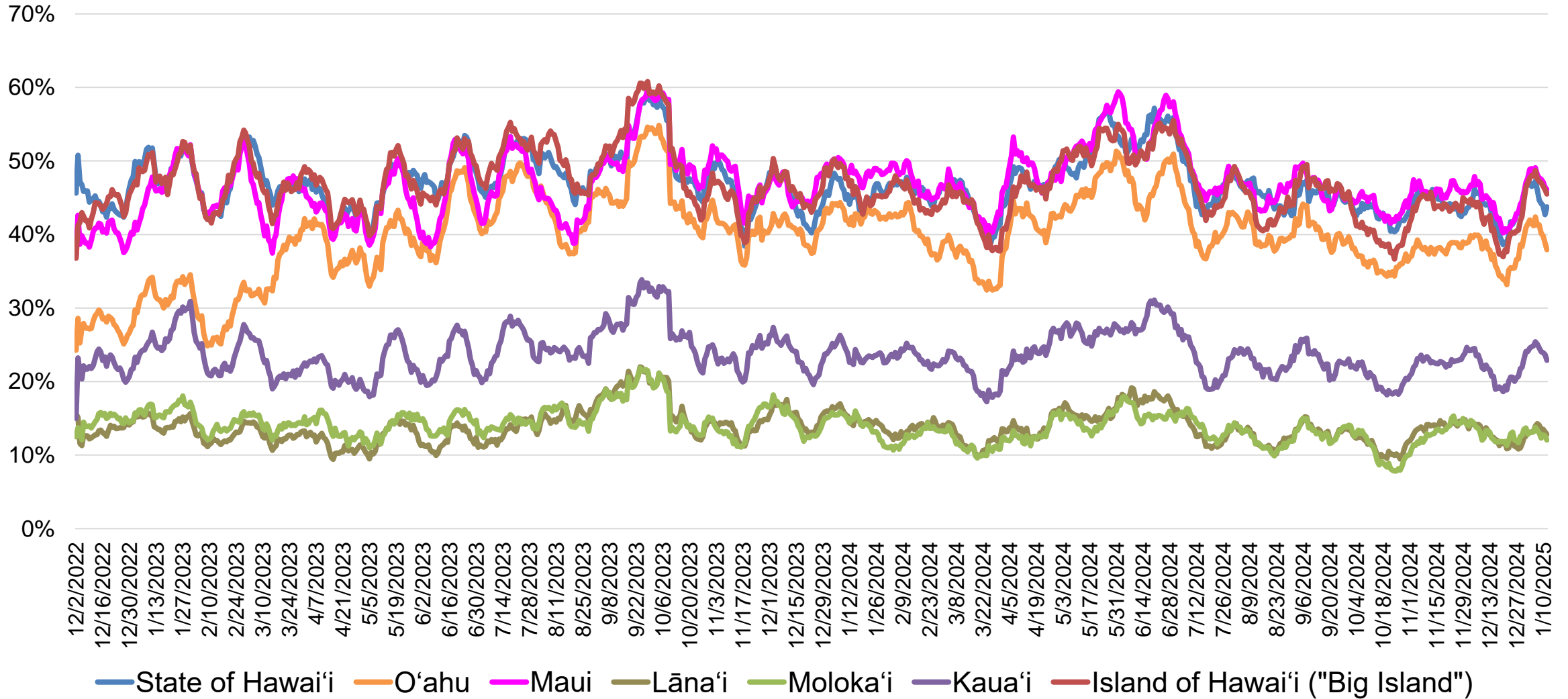


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United States Destination Brand Health Trends

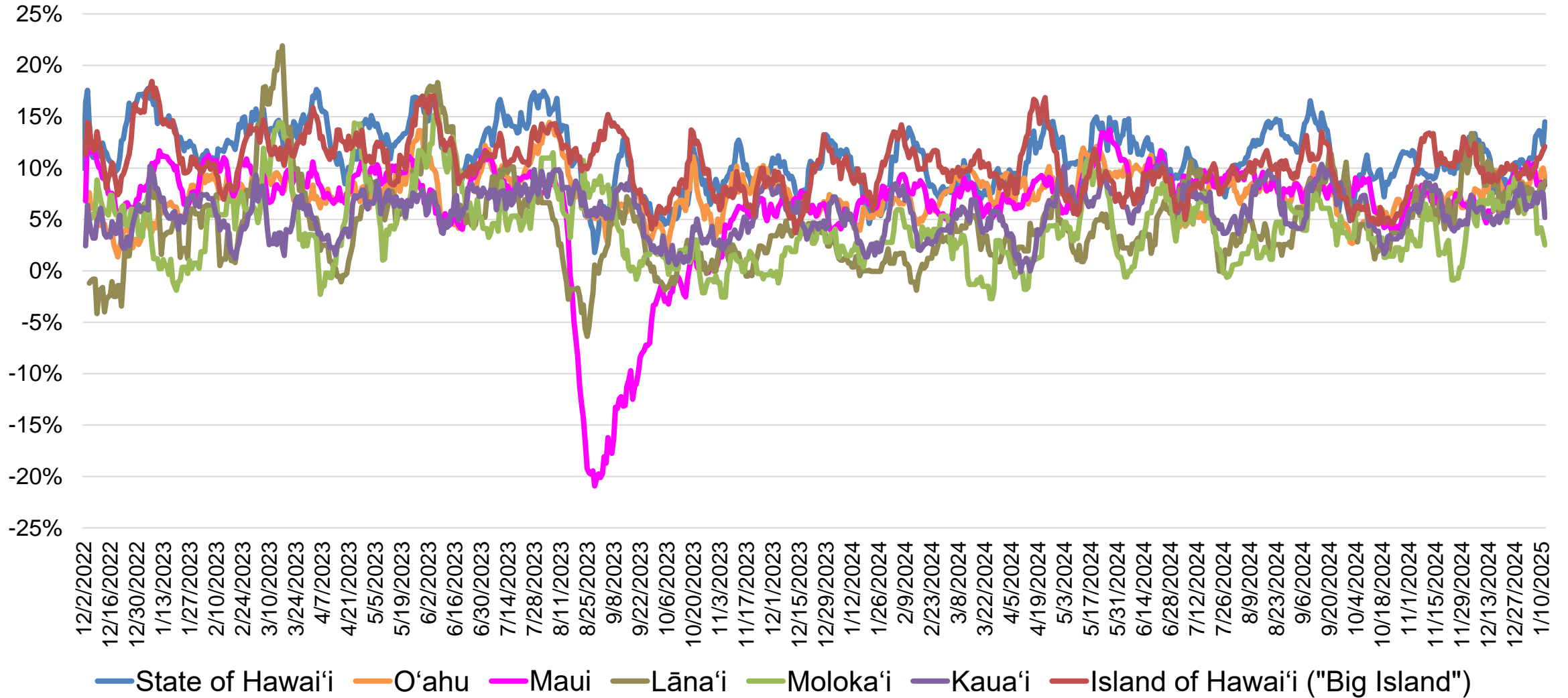


U.S. Destination Awareness Two-Week Moving Average



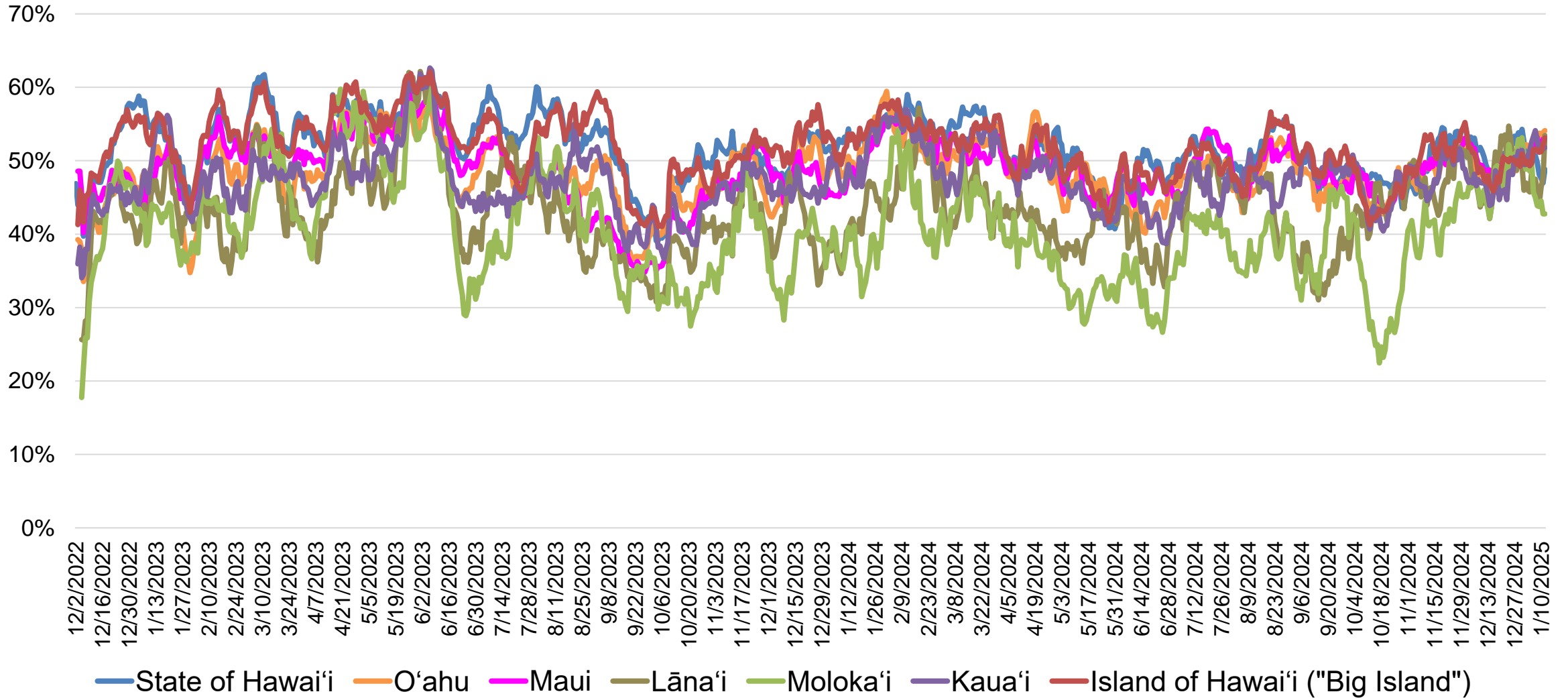
Source: Vision Insights Data as of January 14, 2025

U.S. Chatter (Net) Two-Week Moving Average



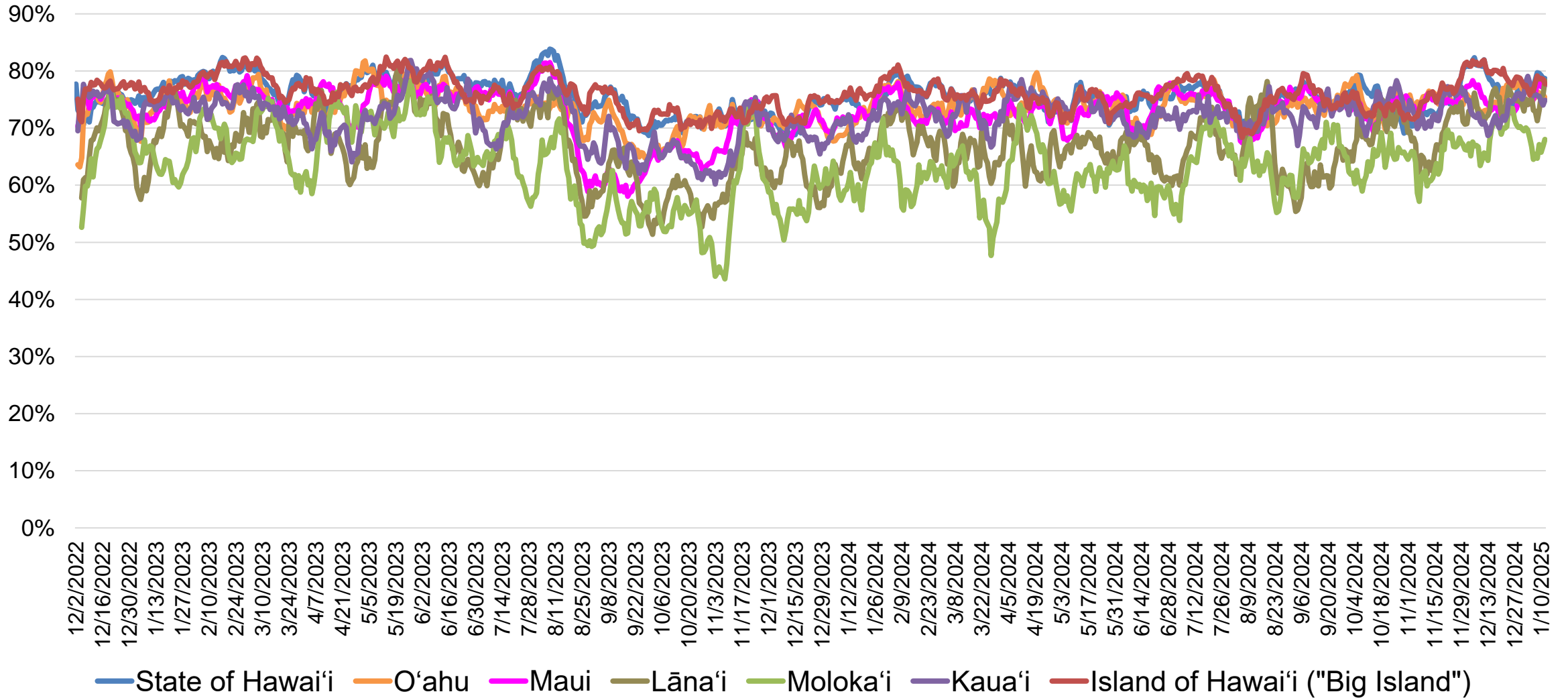
Source: Vision Insights Data as of January 14, 2025

U.S. Consideration Two-Week Moving Average



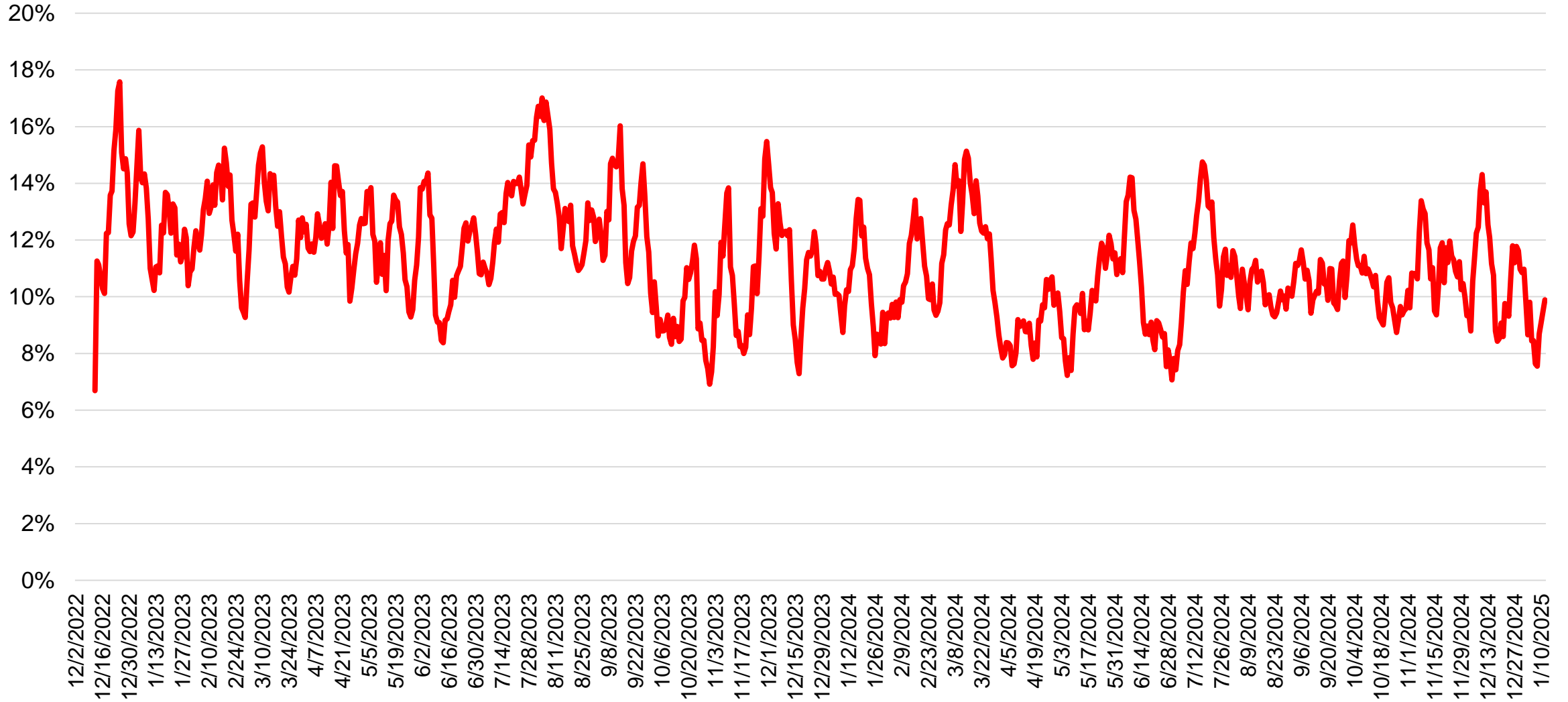
Source: Vision Insights Data as of January 14, 2025

U.S. Favorability Two-Week Moving Average



Source: Vision Insights Data as of January 14, 2025

U.S. Intent to Travel to Any Hawaiian Island One-Week Moving Average



Source: Vision Insights Data as of January 14, 2025

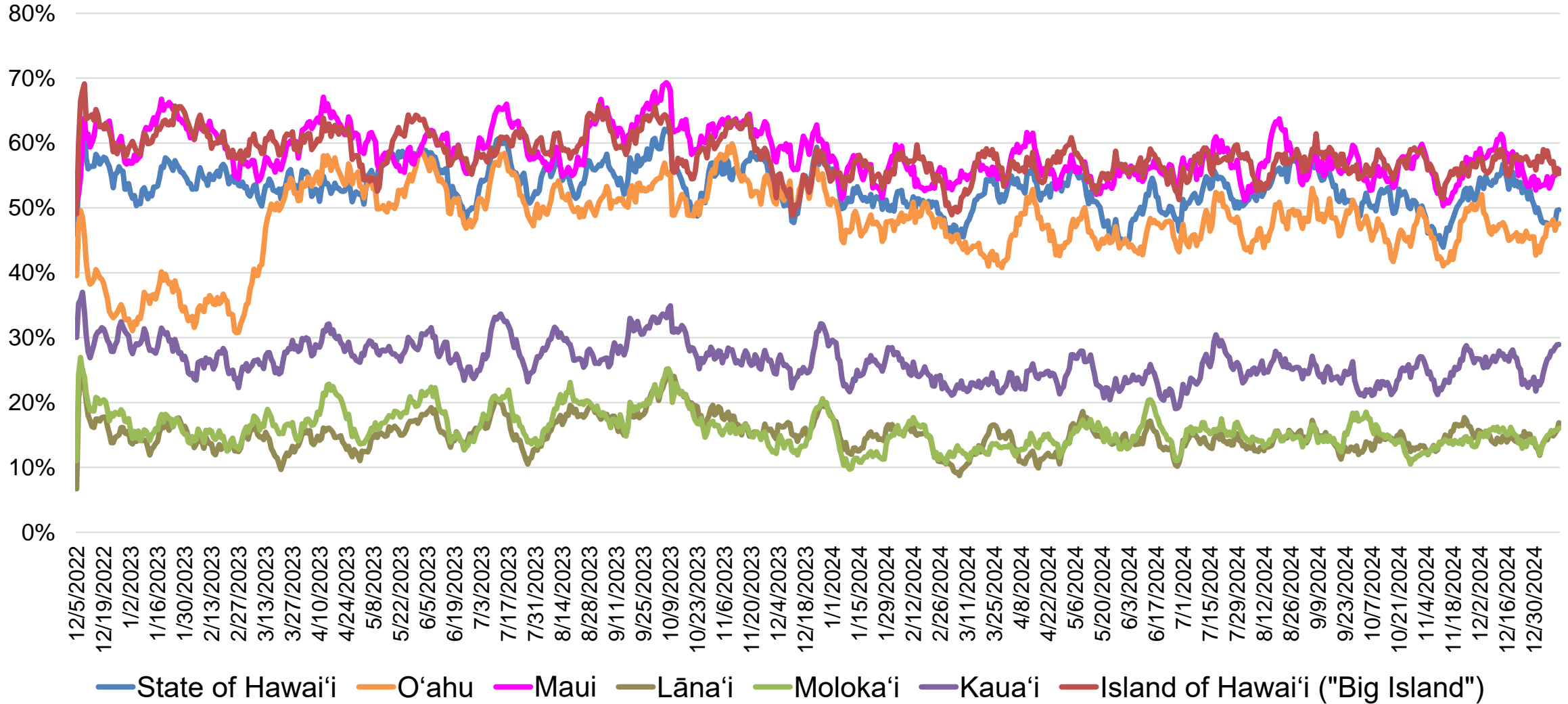


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Canada Destination Brand Health Trends

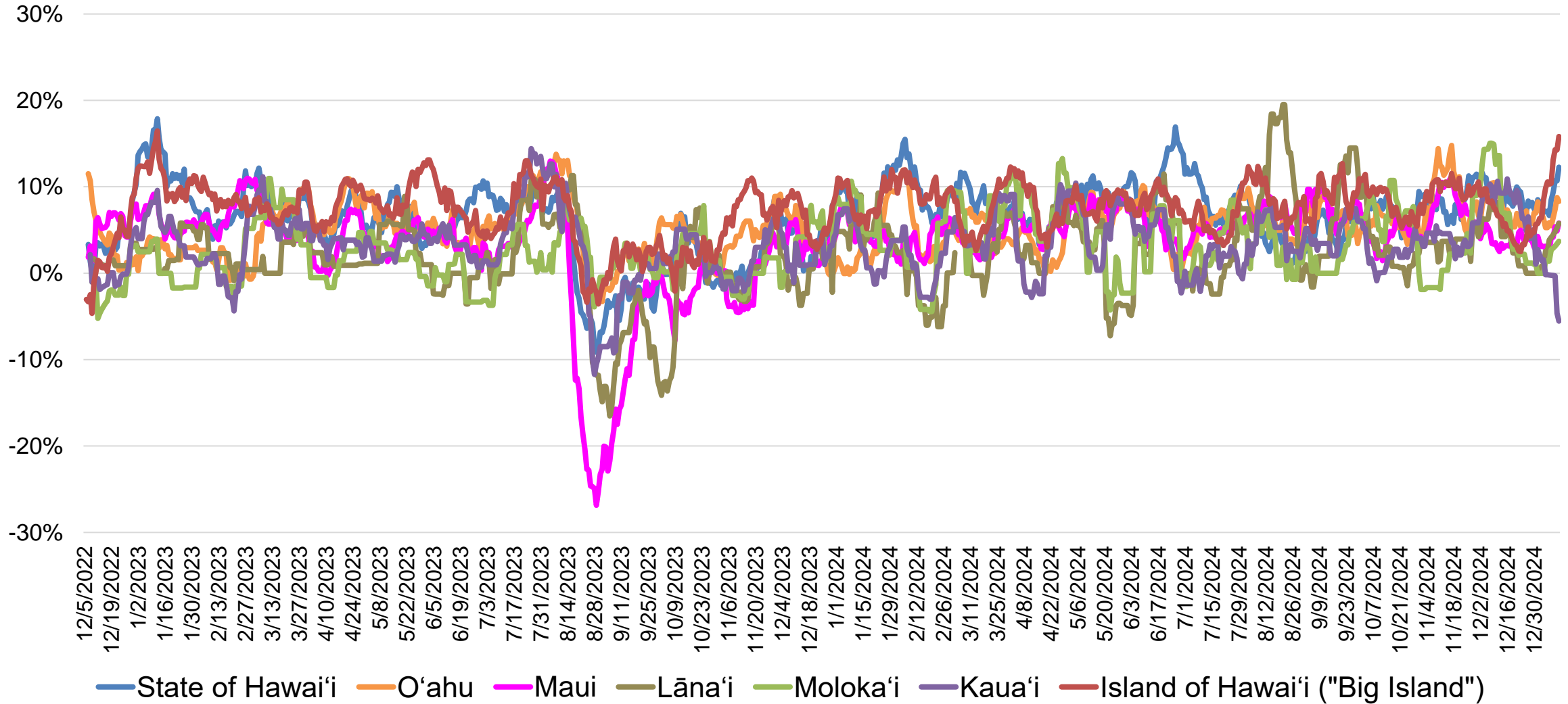


Canada Destination Awareness Two-Week Moving Average



Source: Vision Insights Data as of January 14, 2025

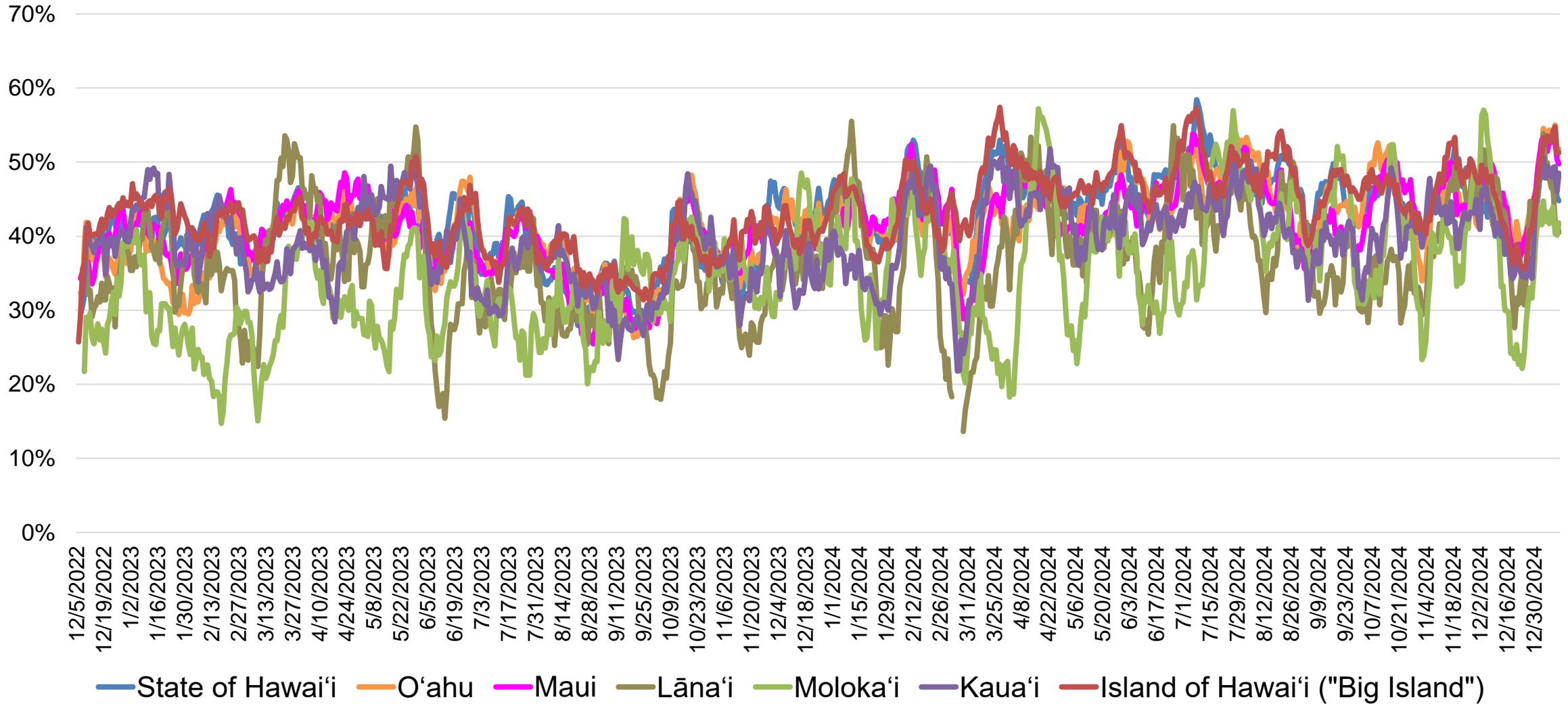
Canada Chatter (Net) Two-Week Moving Average



Source: Vision Insights Data as of January 14, 2025

Samples for Lāna'i are limited

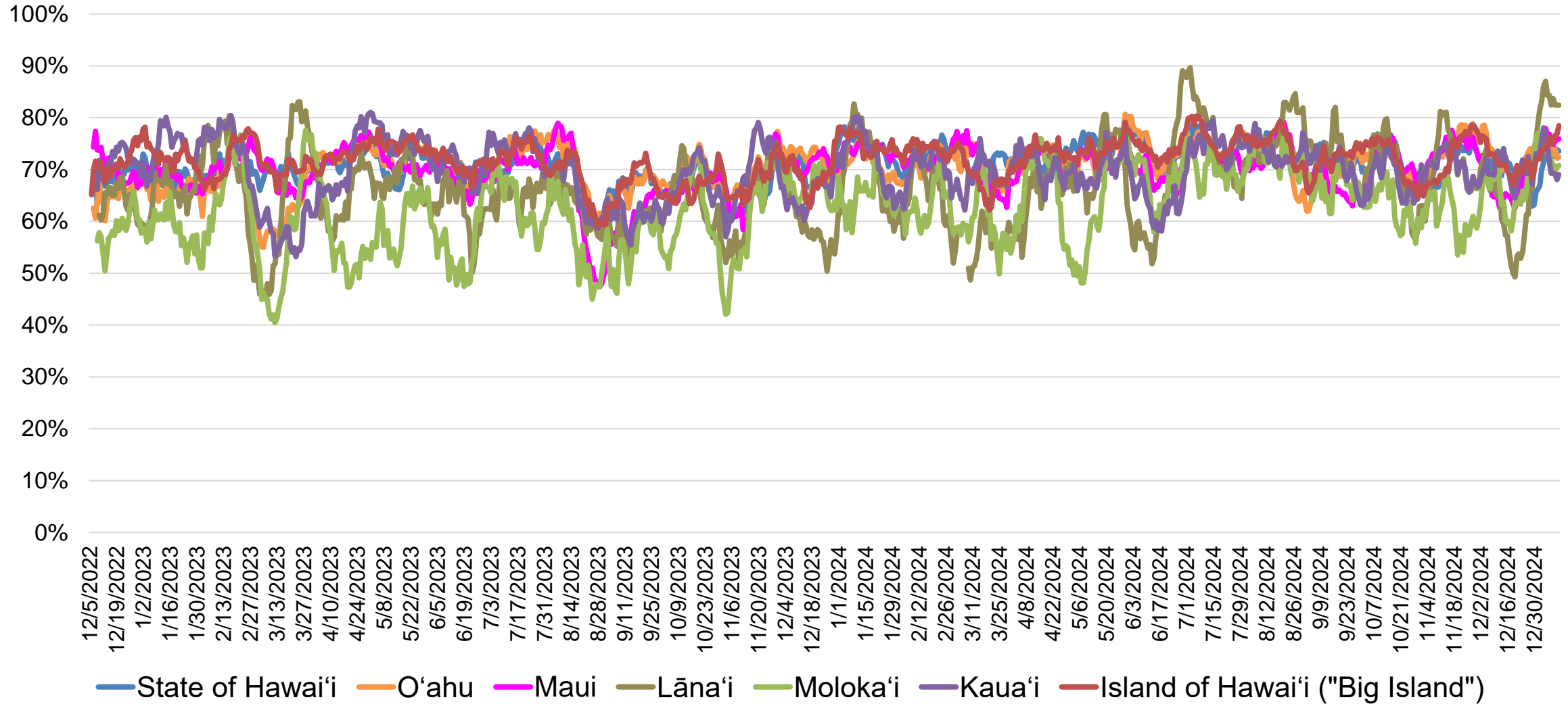
Canada Consideration Two-Week Moving Average



Source: Vision Insights Data as of January 14, 2025

Samples for Lāna'i are limited

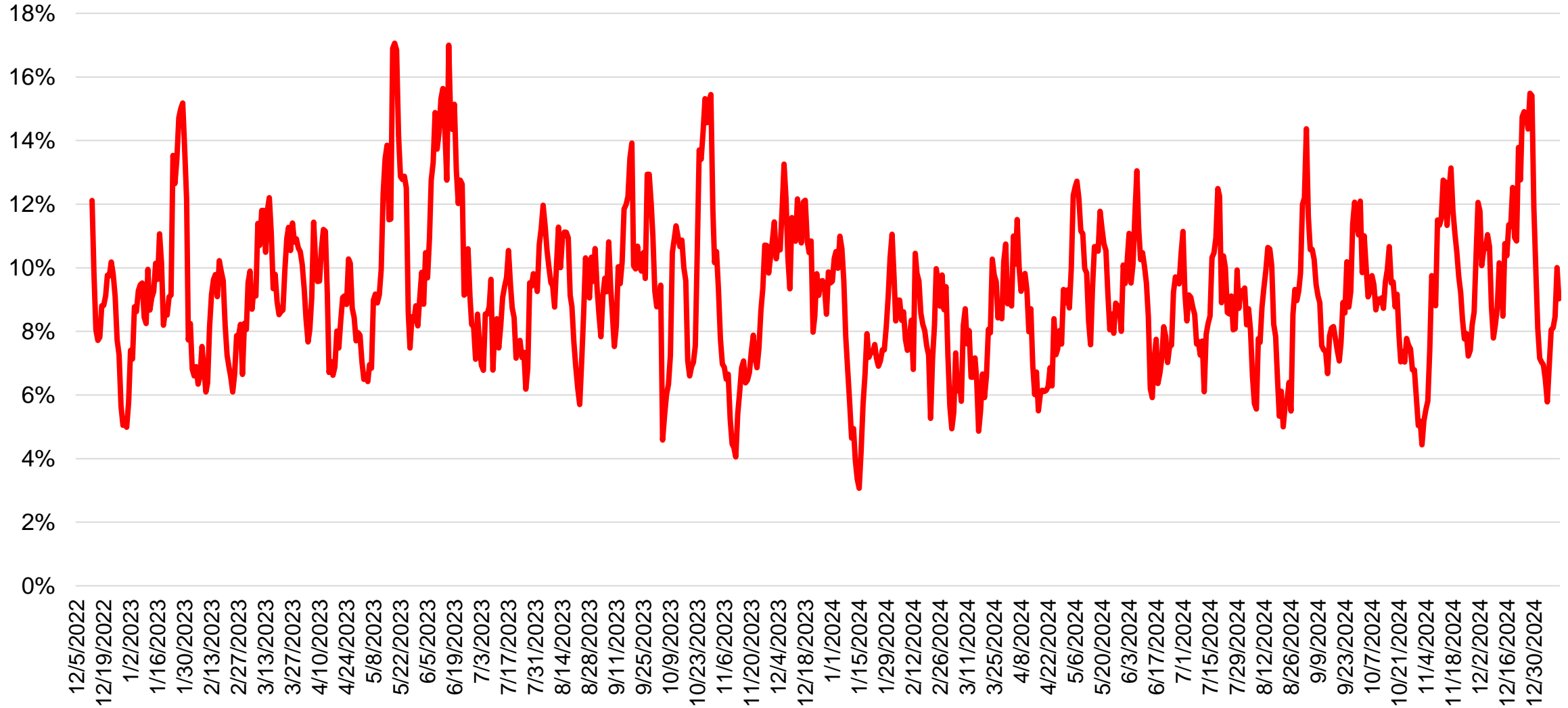
Canada Favorability Two-Week Moving Average



Source: Vision Insights Data as of January 14, 2025

Samples for Lāna'i are limited

Canada Intent to Travel to Any Hawaiian Island One-Week Moving Average



Source: Vision Insights Data as of January 14, 2025

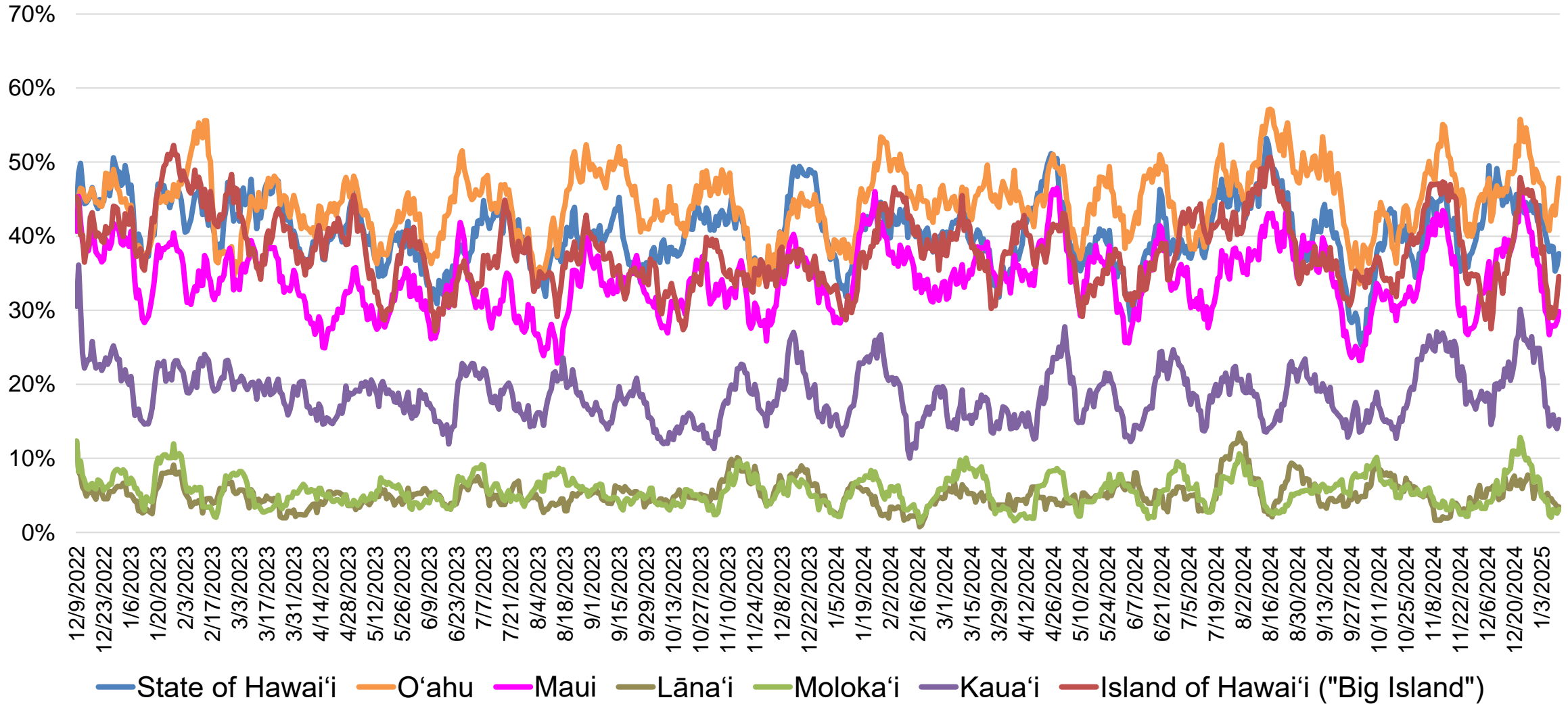


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Japan Destination Brand Health Trends

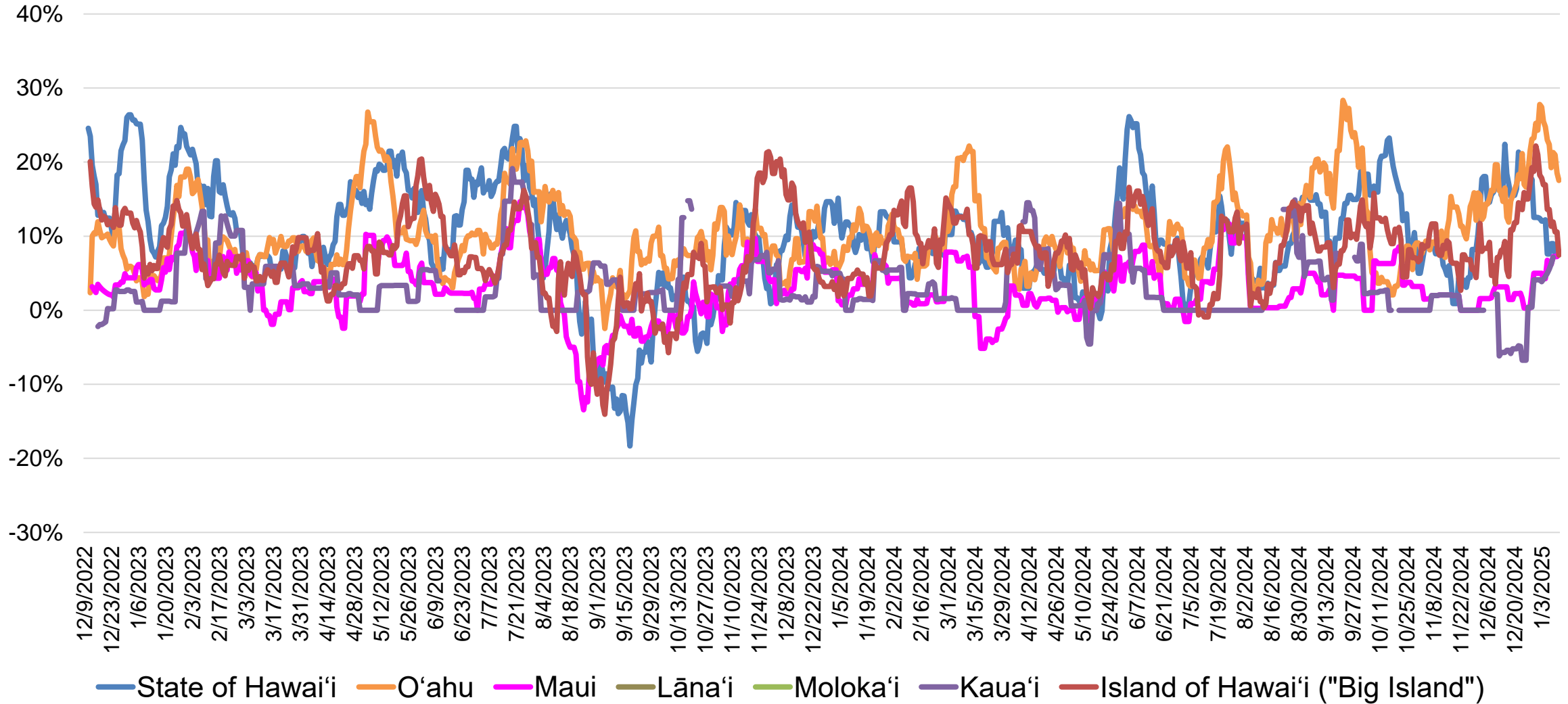


Japan Destination Awareness Two-Week Moving Average



Source: Vision Insights Data as of January 14, 2025

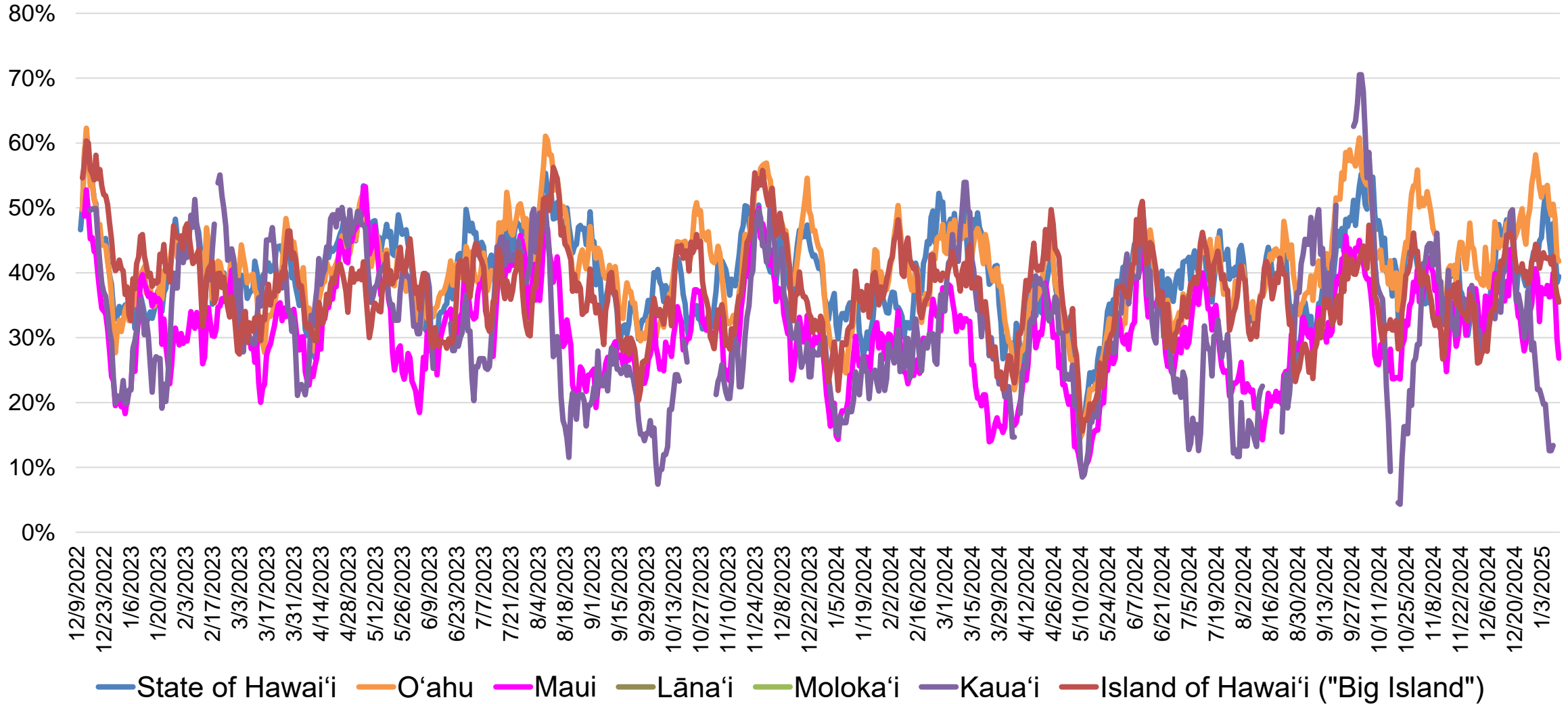
Japan Chatter (Net) Two-Week Moving Average



Source: Vision Insights Data as of January 14, 2025

Samples for Kaua'i, Moloka'i and Lāna'i are small

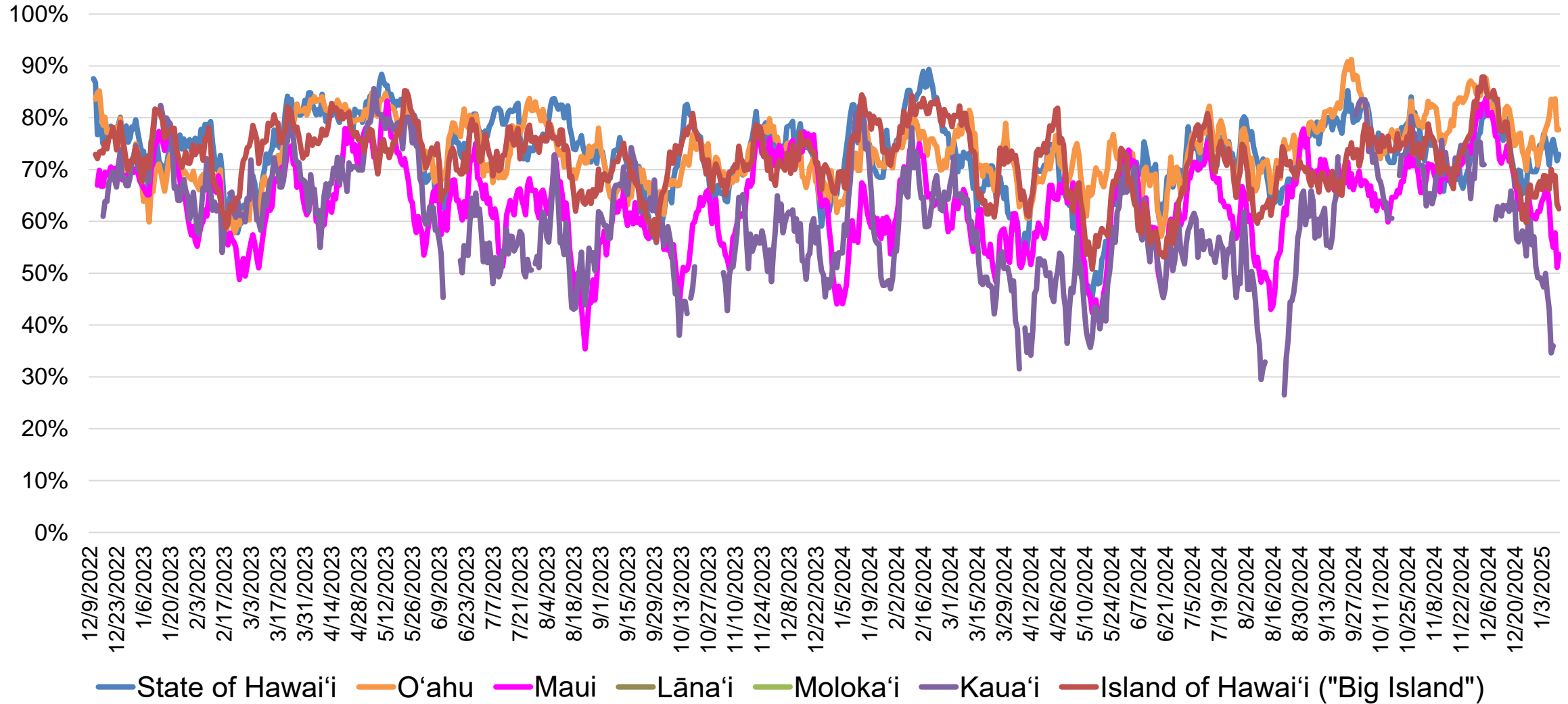
Japan Consideration Two-Week Moving Average



Source: Vision Insights Data as of January 14, 2025

Samples for Kaua'i, Moloka'i and Lāna'i are small

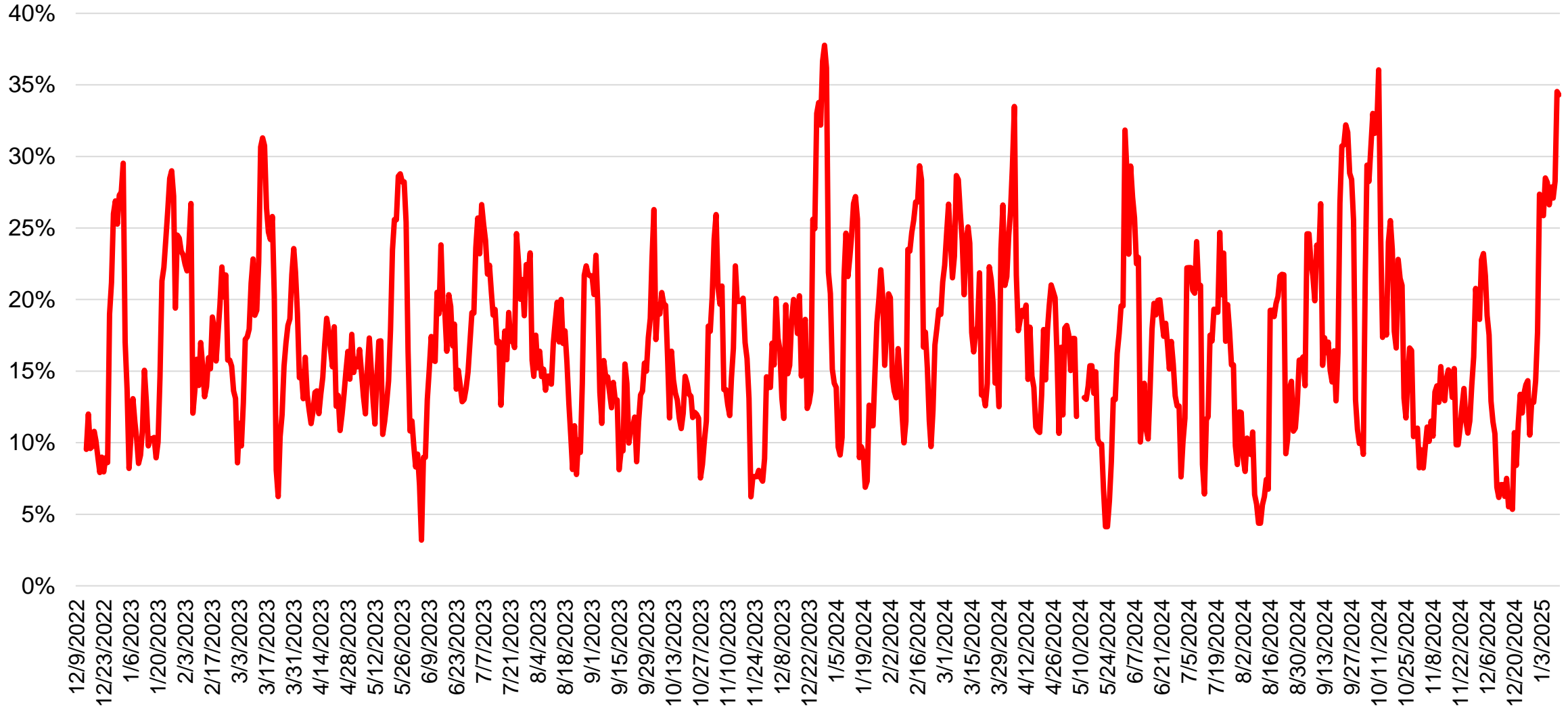
Japan Favorability Two-Week Moving Average



Source: Vision Insights Data as of January 14, 2025

Samples for Kaua'i, Moloka'i and Lāna'i are small

Japan Intent to Travel to Any Hawaiian Island One-Week Moving Average



Source: Vision Insights Data as of January 14, 2025

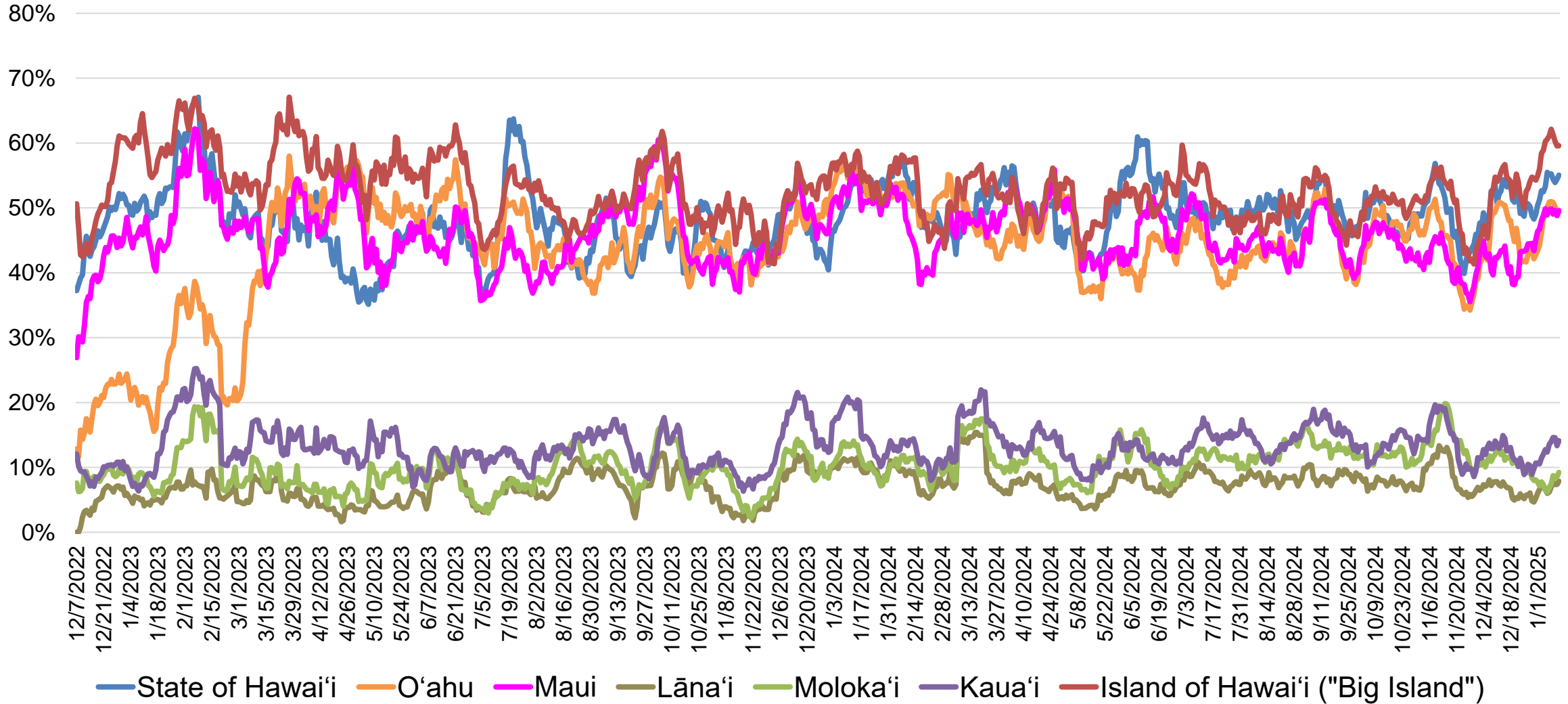


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Australia Destination Brand Health Trends

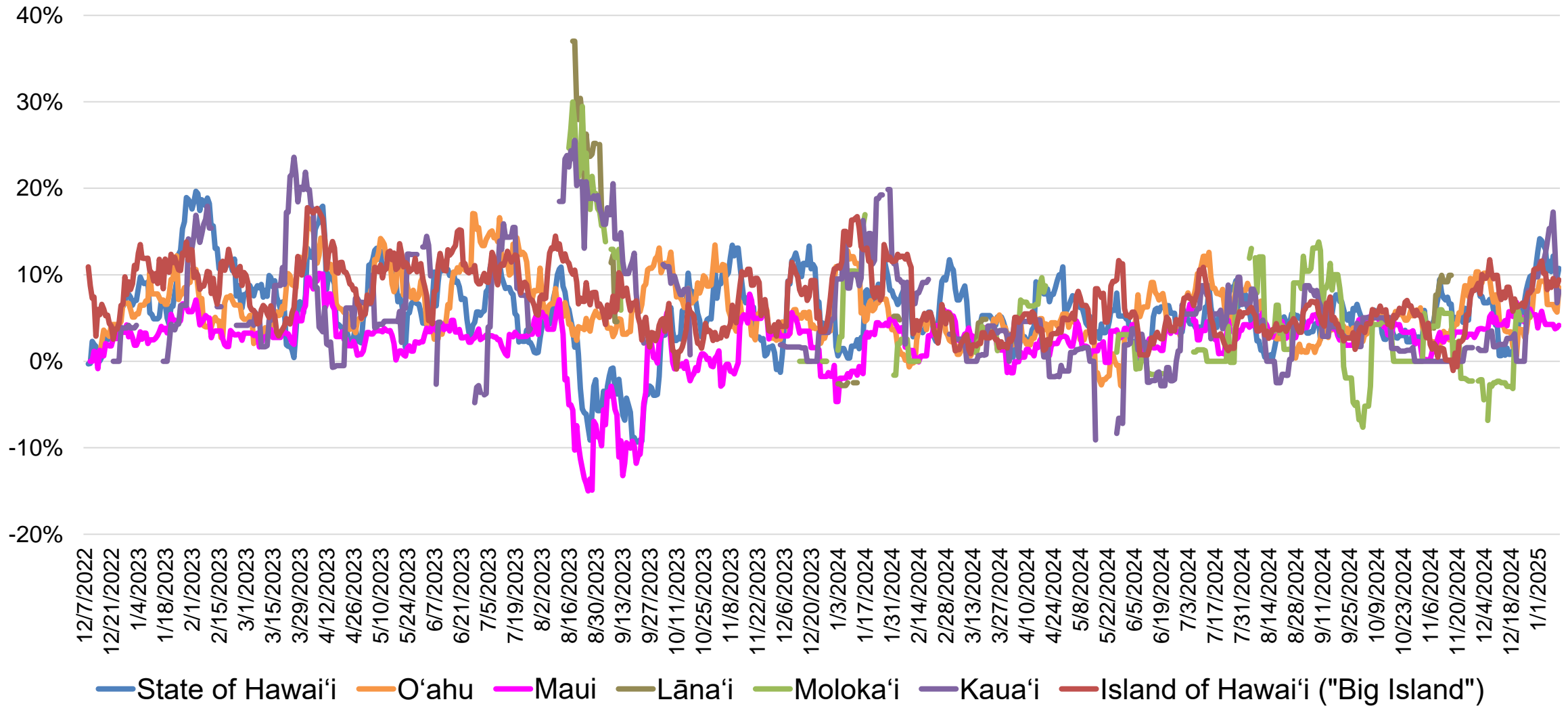


Australia Destination Awareness Two-Week Moving Average



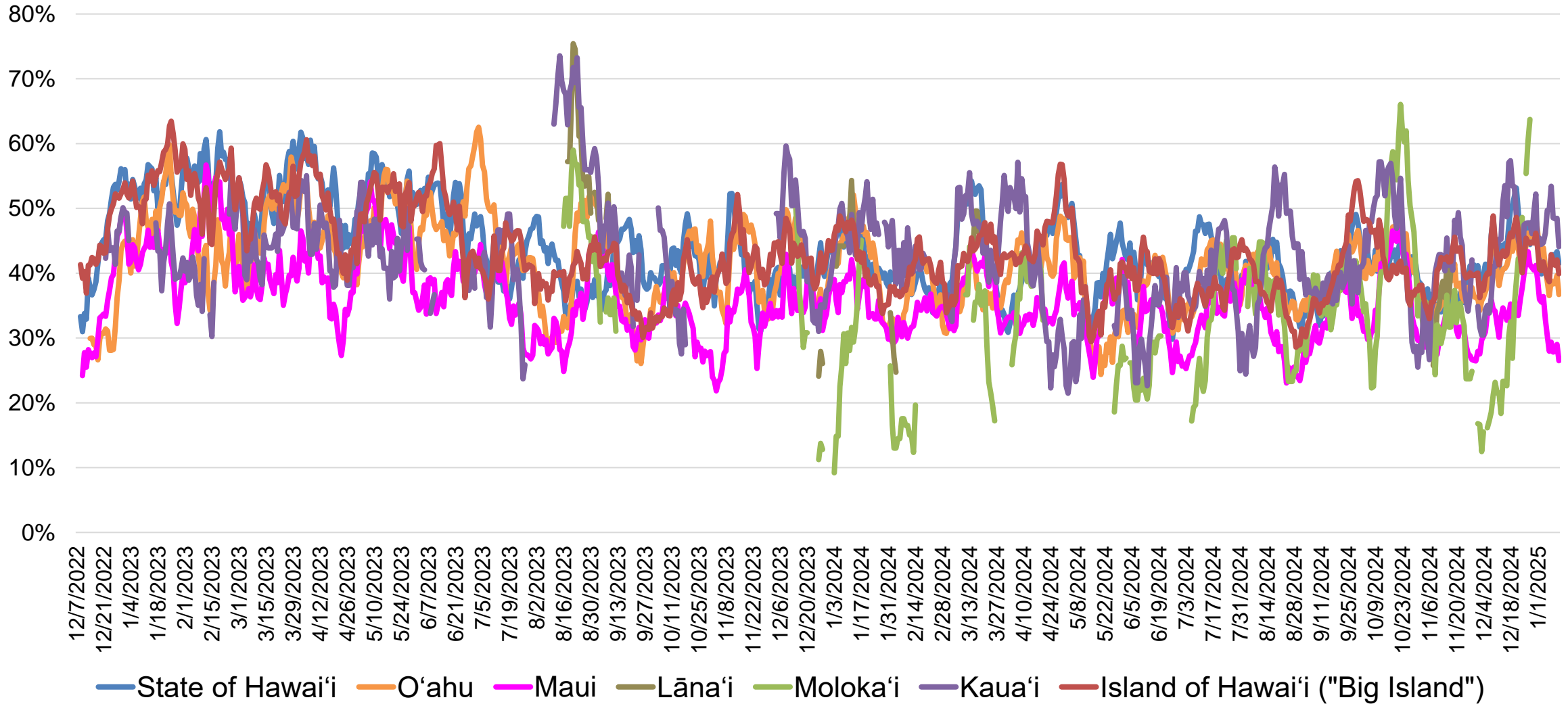
Source: Vision Insights Data as of January 14, 2025

Australia Chatter (Net) Two-Week Moving Average



Source: Vision Insights Data as of January 14, 2025
Samples for Kaua'i, Moloka'i, and Lāna'i are limited

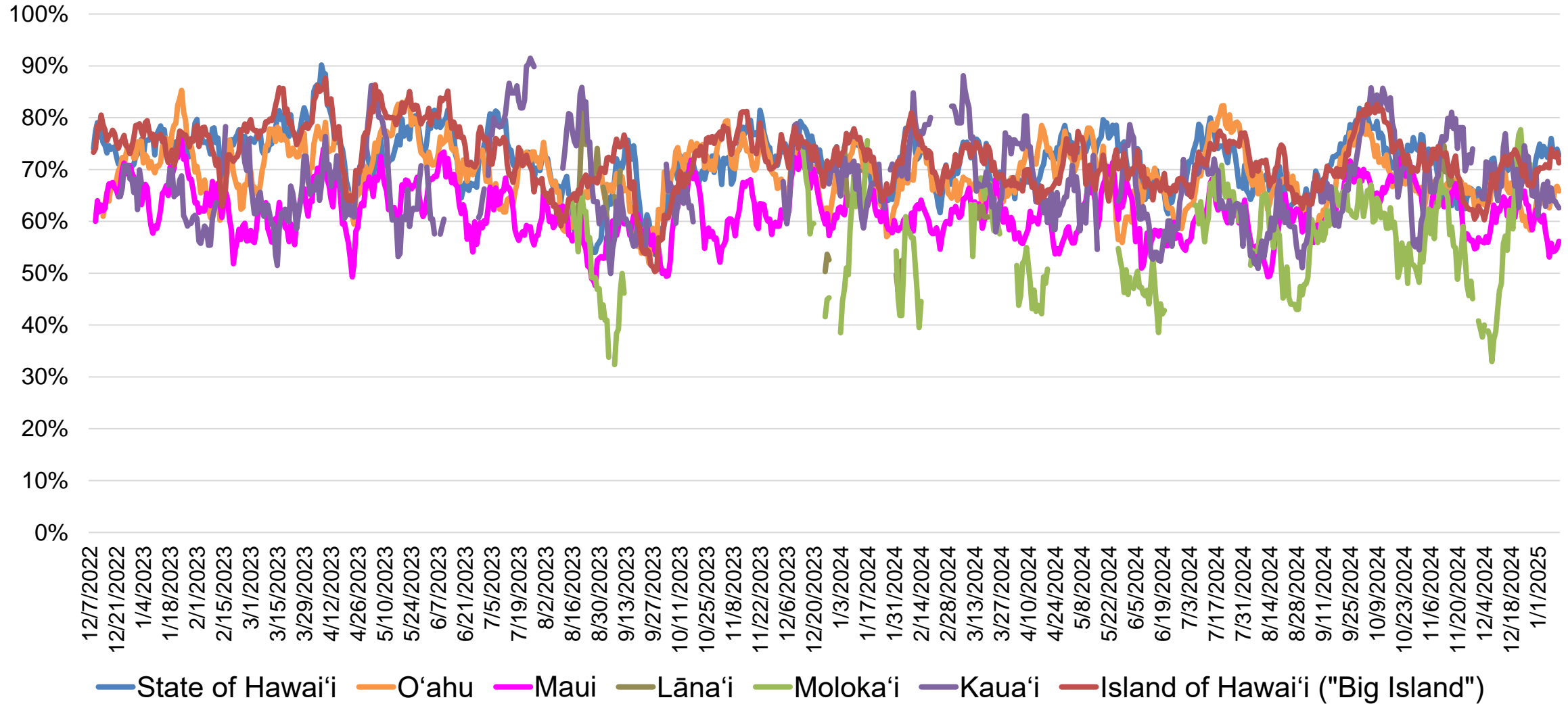
Australia Consideration Two-Week Moving Average



Source: Vision Insights Data as of January 14, 2025

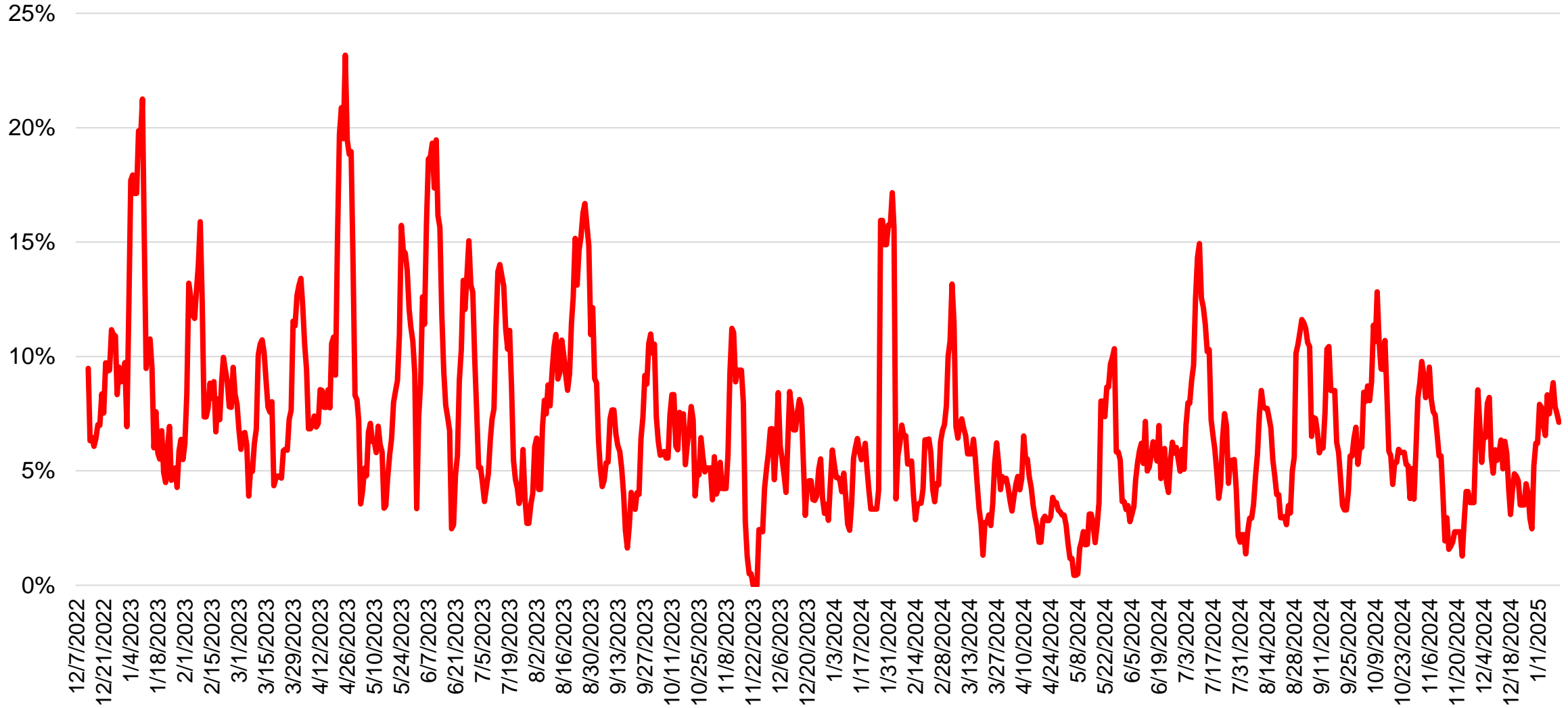
Samples for Kaua'i, Moloka'i, and Lāna'i are limited

Australia Favorability Two-Week Moving Average



Source: Vision Insights Data as of January 14, 2025
Samples for Kaua'i, Moloka'i, and Lāna'i are limited

Australia Intent to Travel to Any Hawaiian Island One-Week Moving Average



Source: Vision Insights Data as of January 14, 2025

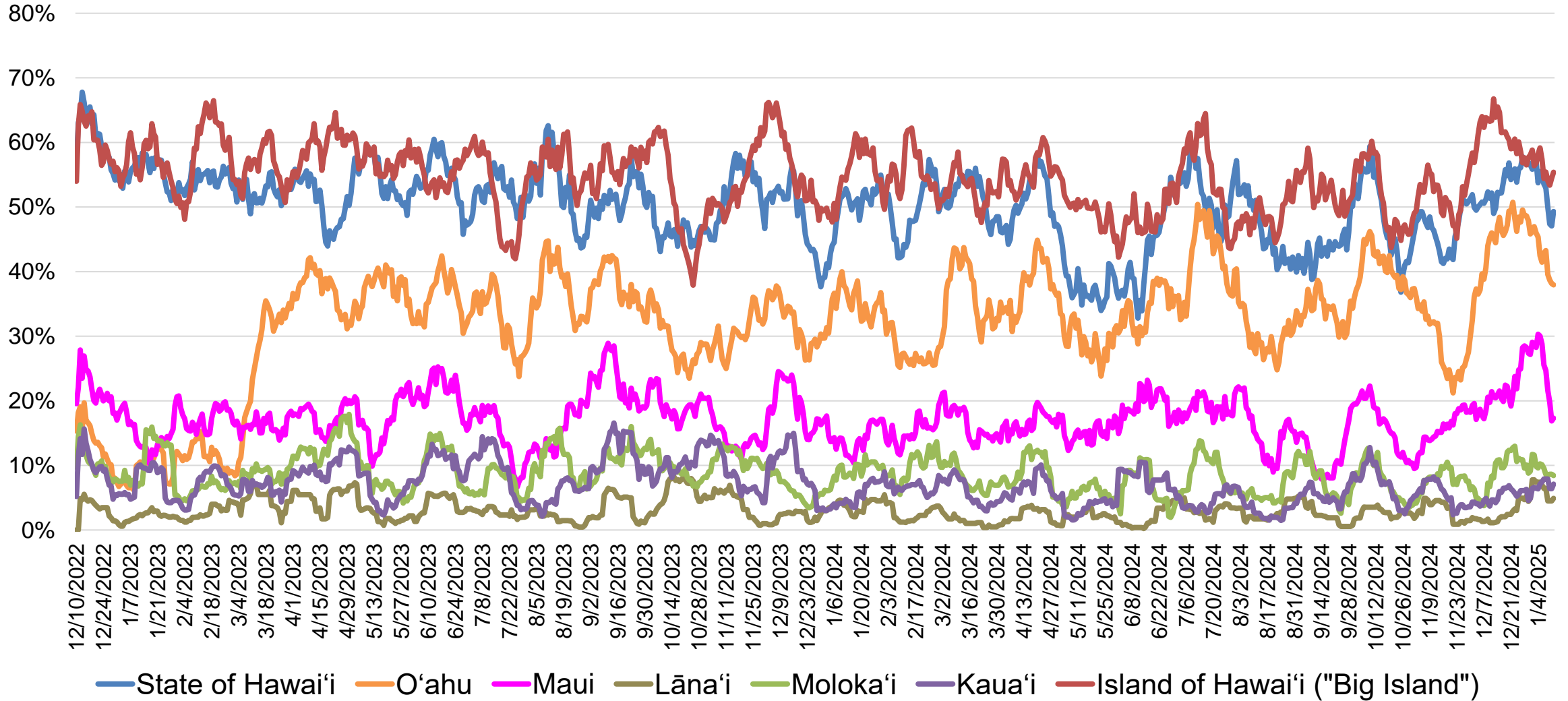


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Korea Destination Brand Health Trends

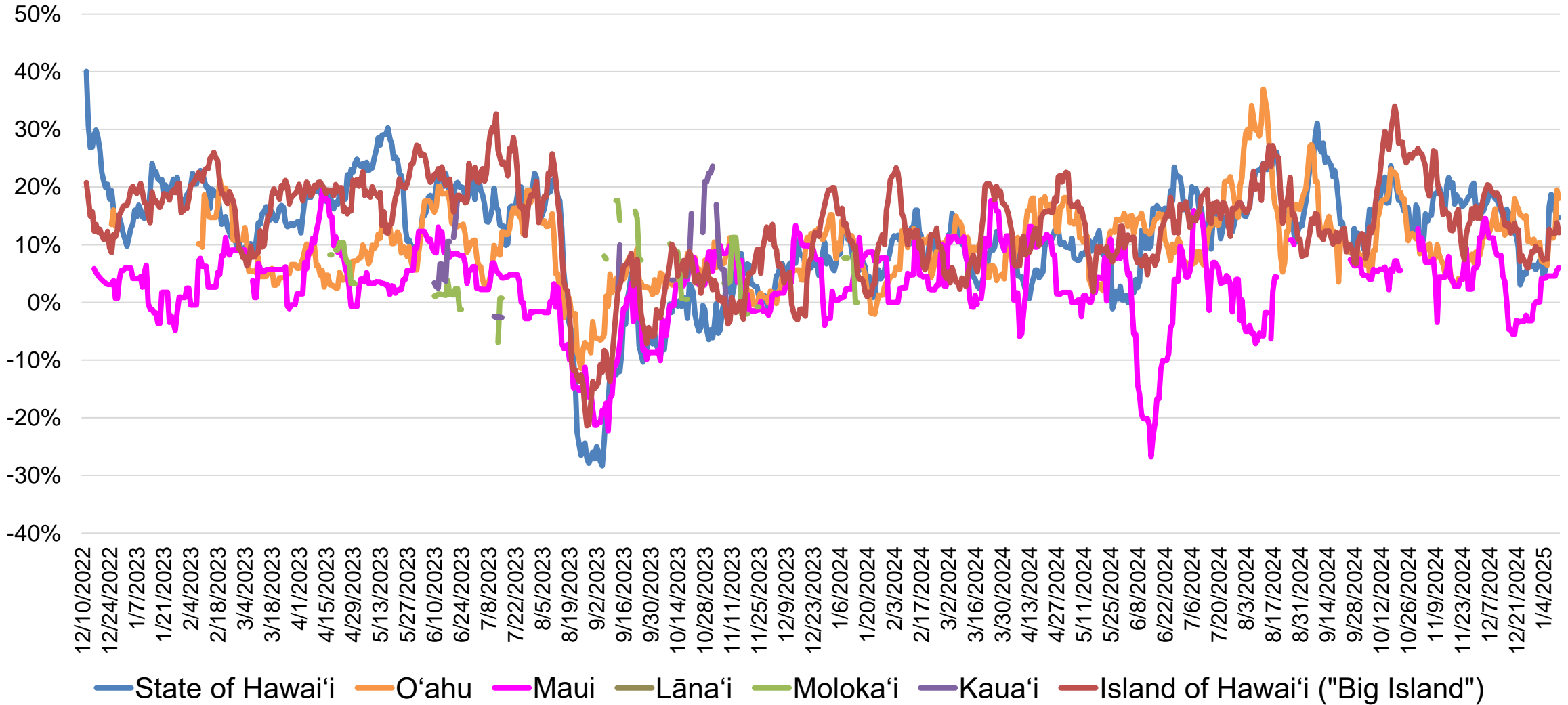


Korea Destination Awareness Two-Week Moving Average



Source: Vision Insights Data as of January 14, 2025

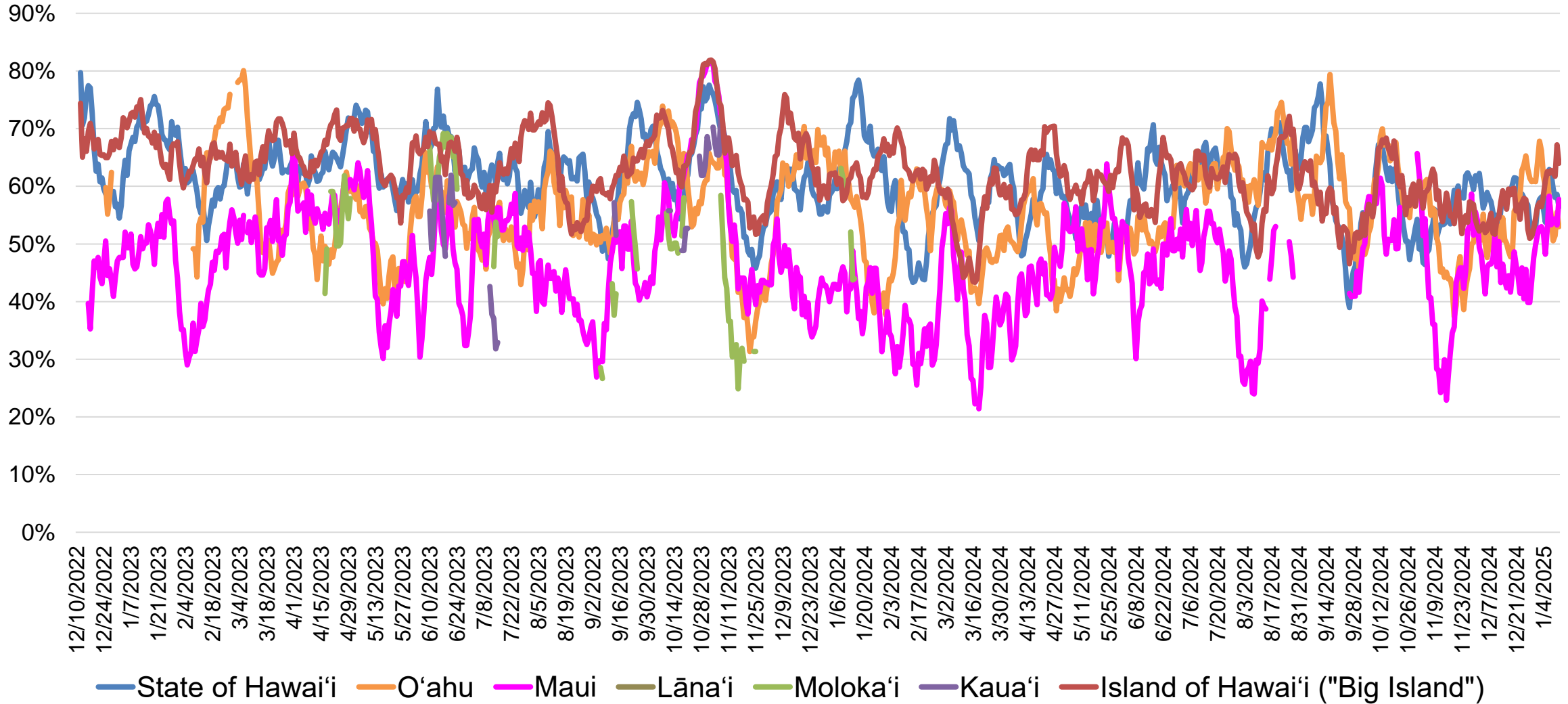
Korea Chatter (Net) Two-Week Moving Average



Source: Vision Insights Data as of January 14, 2025

Samples for O'ahu, Maui, Kaua'i, Moloka'i, and Lāna'i are limited

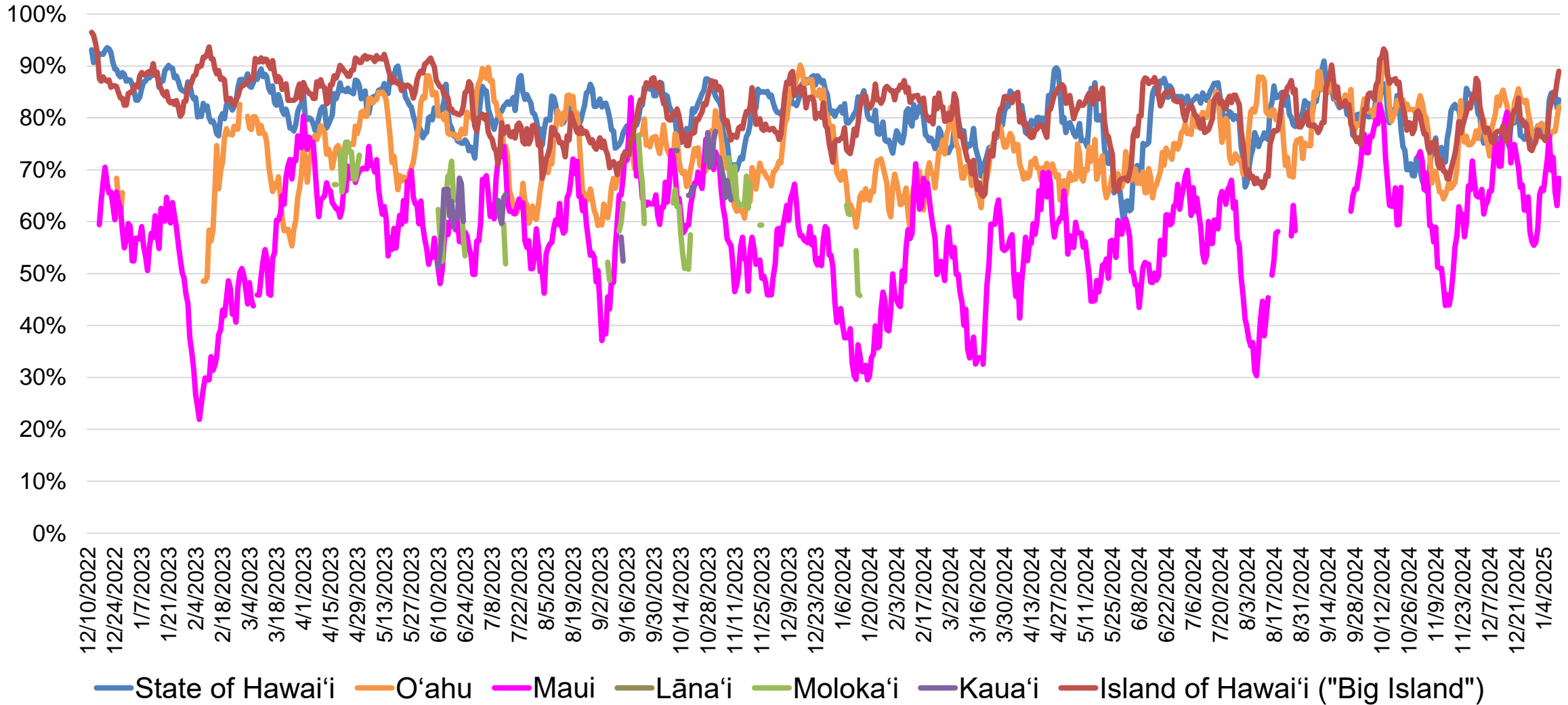
Korea Consideration Two-Week Moving Average



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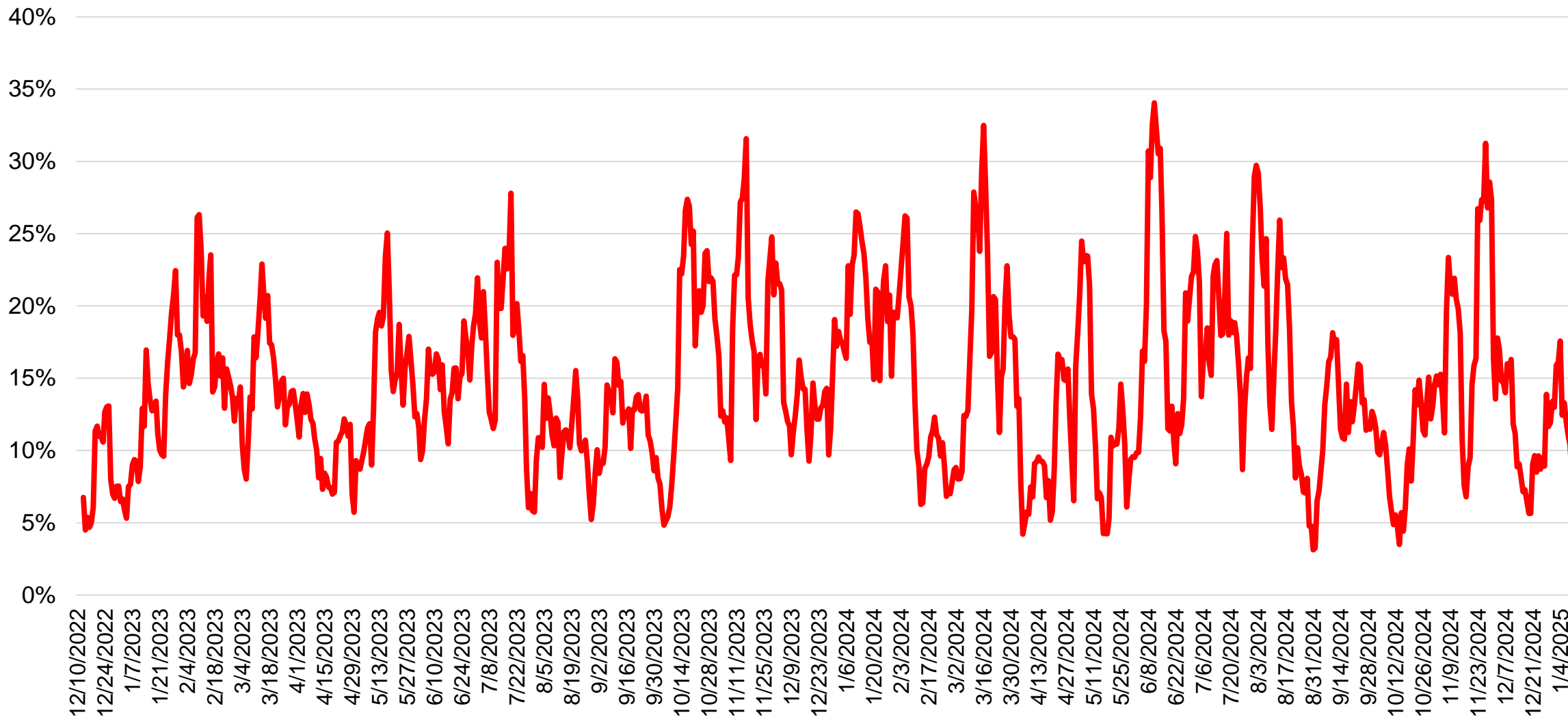
Korea Favorability Two-Week Moving Average



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Samples for O'ahu, Maui, Kaua'i, Moloka'i, and Lāna'i are limited

Korea Intent to Travel to Any Hawaiian Island One-Week Moving Average



Source: Vision Insights Data as of January 14, 2025