



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

# **Vision Insights**

# **Destination Brand Health Trends**

February 18, 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

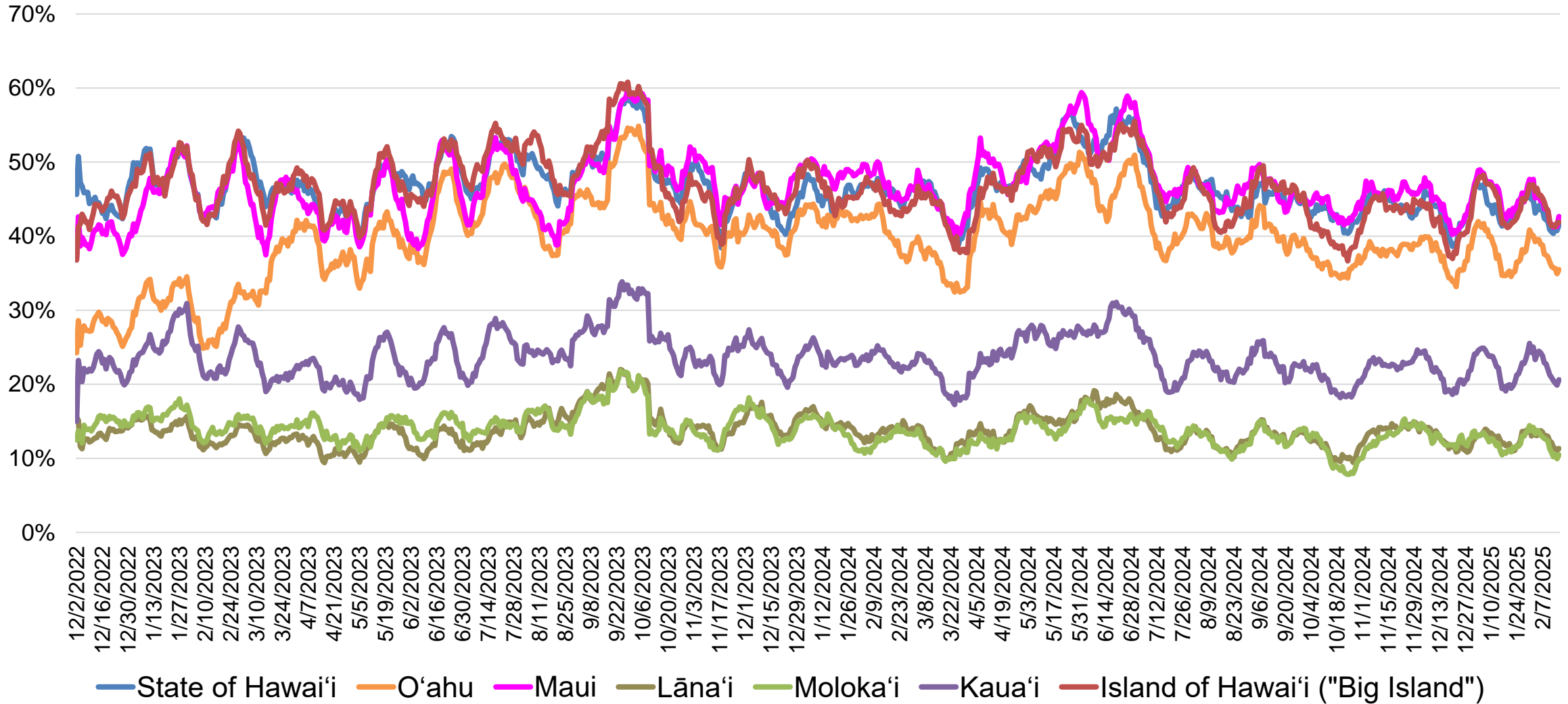


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# United States Destination Brand Health Trends

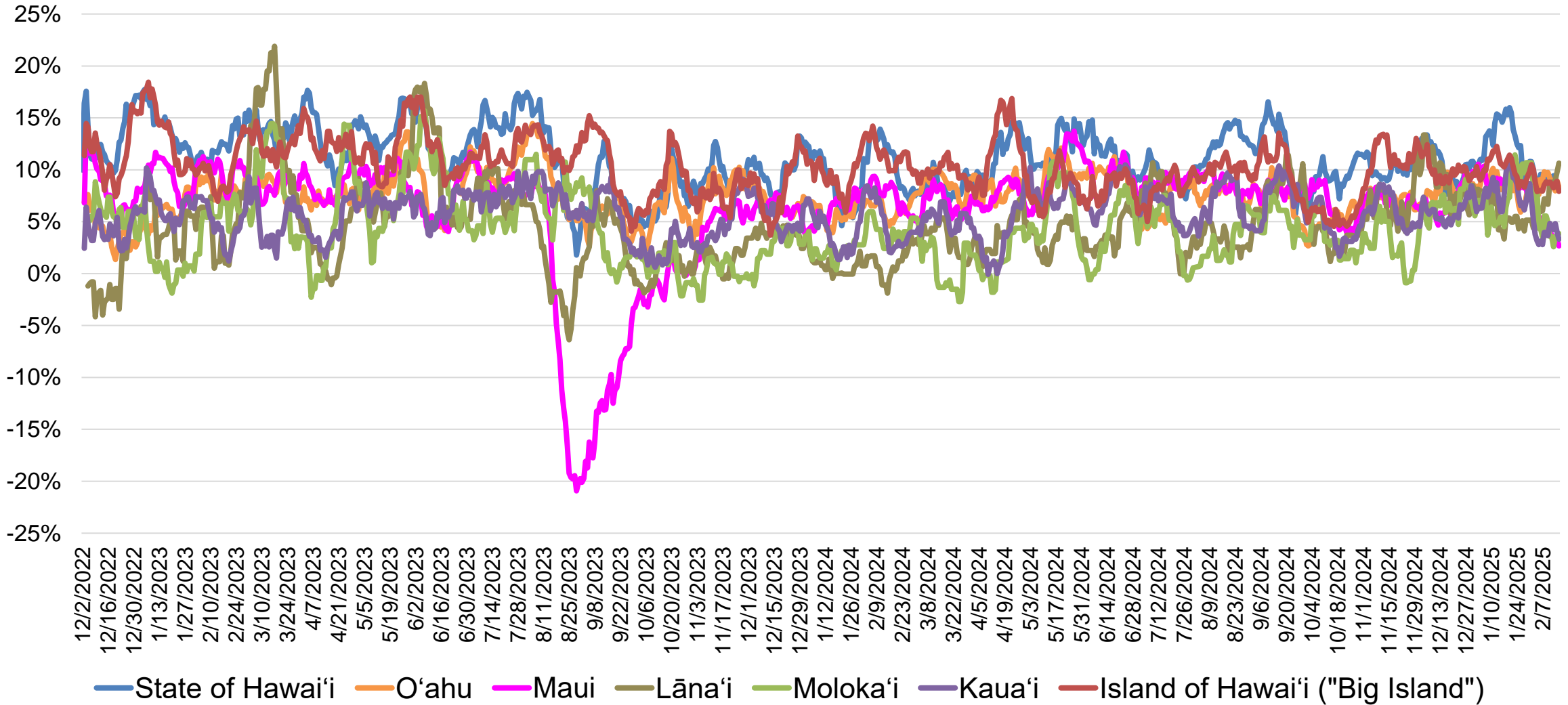


# U.S. Destination Awareness Two-Week Moving Average



Source: Vision Insights Data as of February 18, 2025

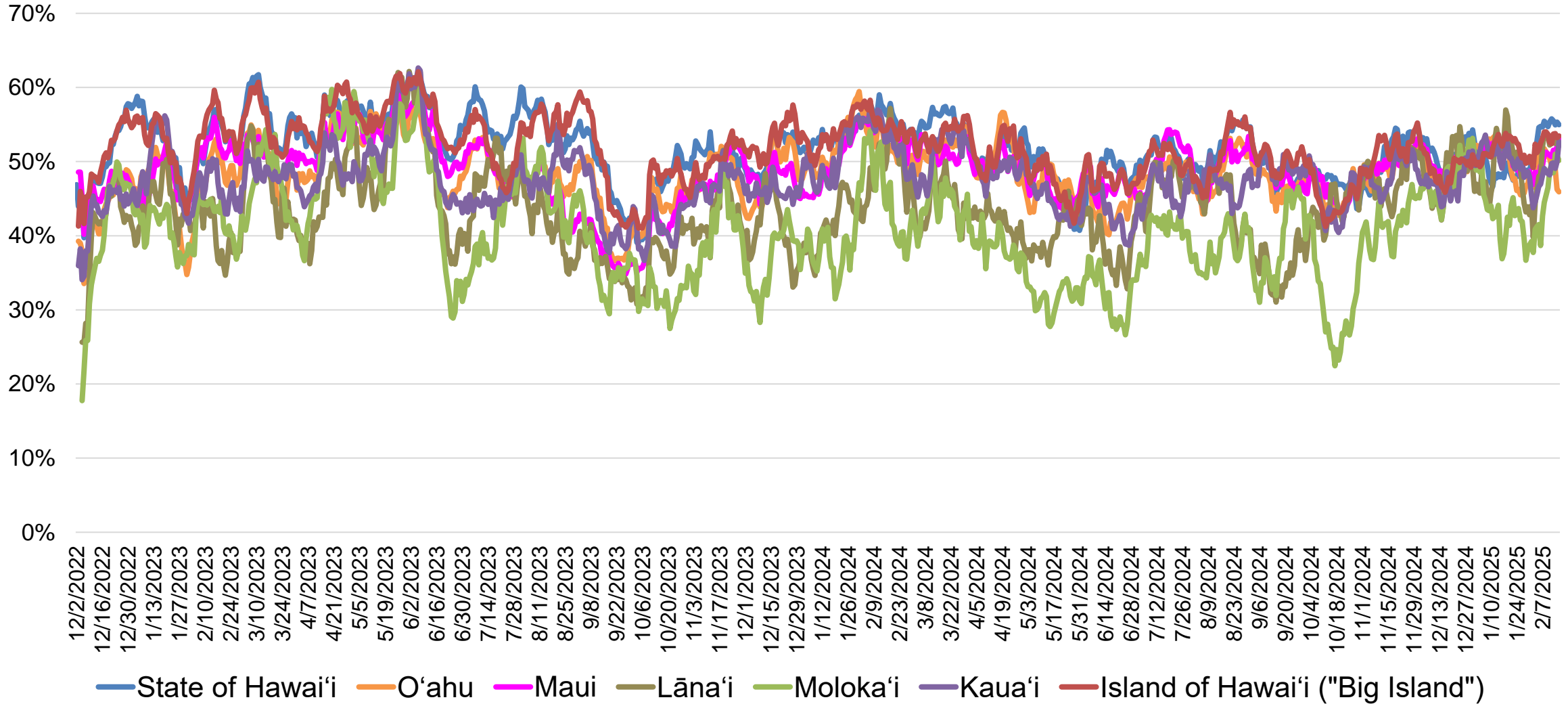
# U.S. Chatter (Net) Two-Week Moving Average



Source: Vision Insights Data as of February 18, 2025

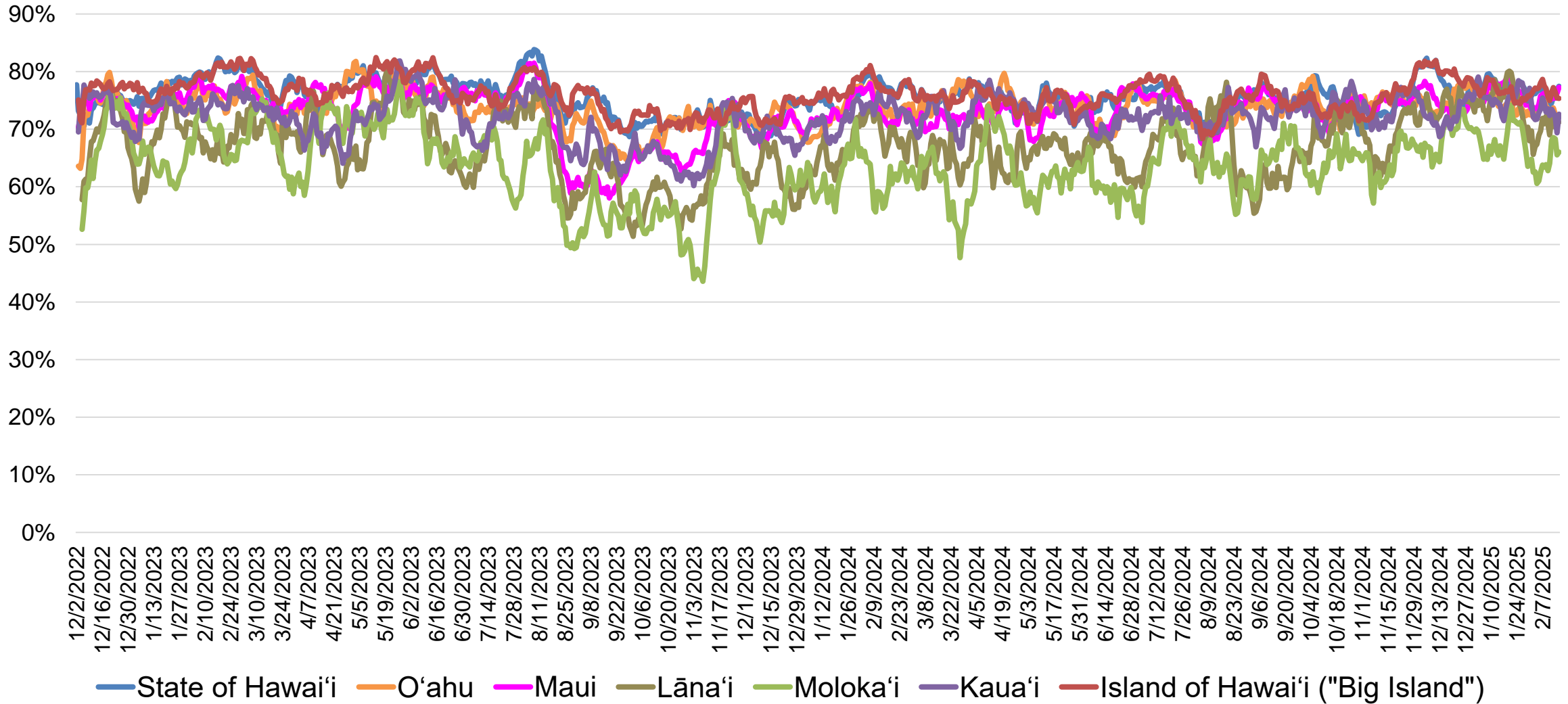


# U.S. Consideration Two-Week Moving Average



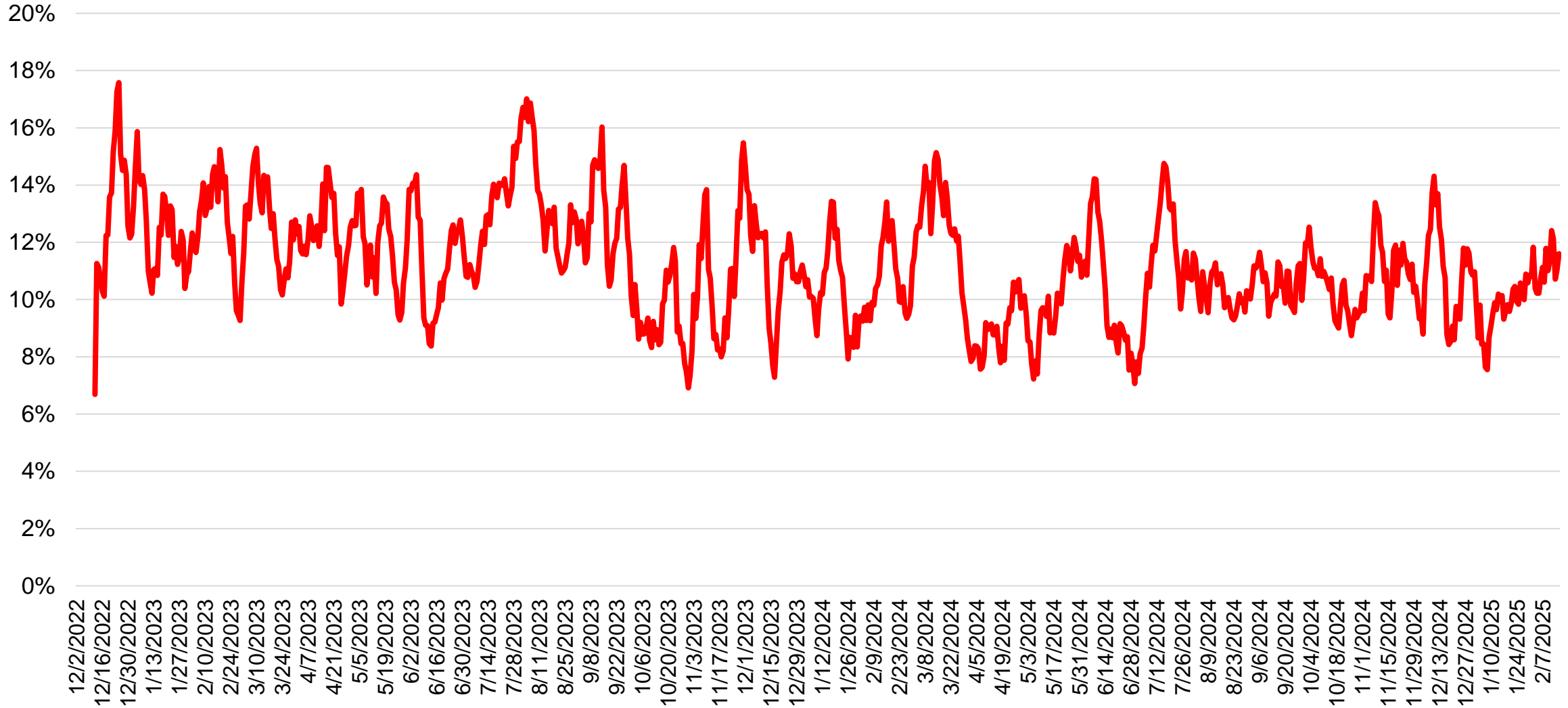
Source: Vision Insights Data as of February 18, 2025

# U.S. Favorability Two-Week Moving Average



Source: Vision Insights Data as of February 18, 2025

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



Source: Vision Insights Data as of February 18, 2025

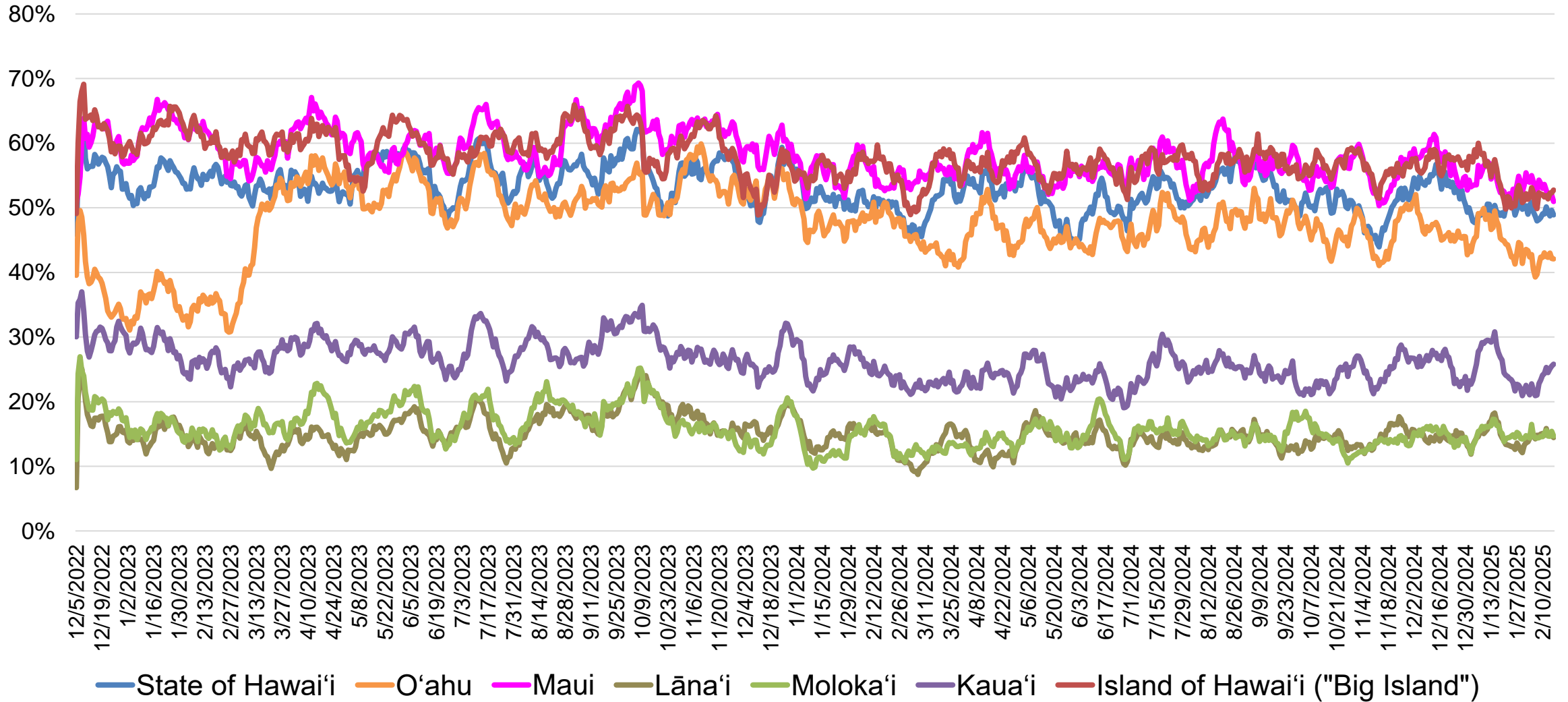


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# Canada Destination Brand Health Trends

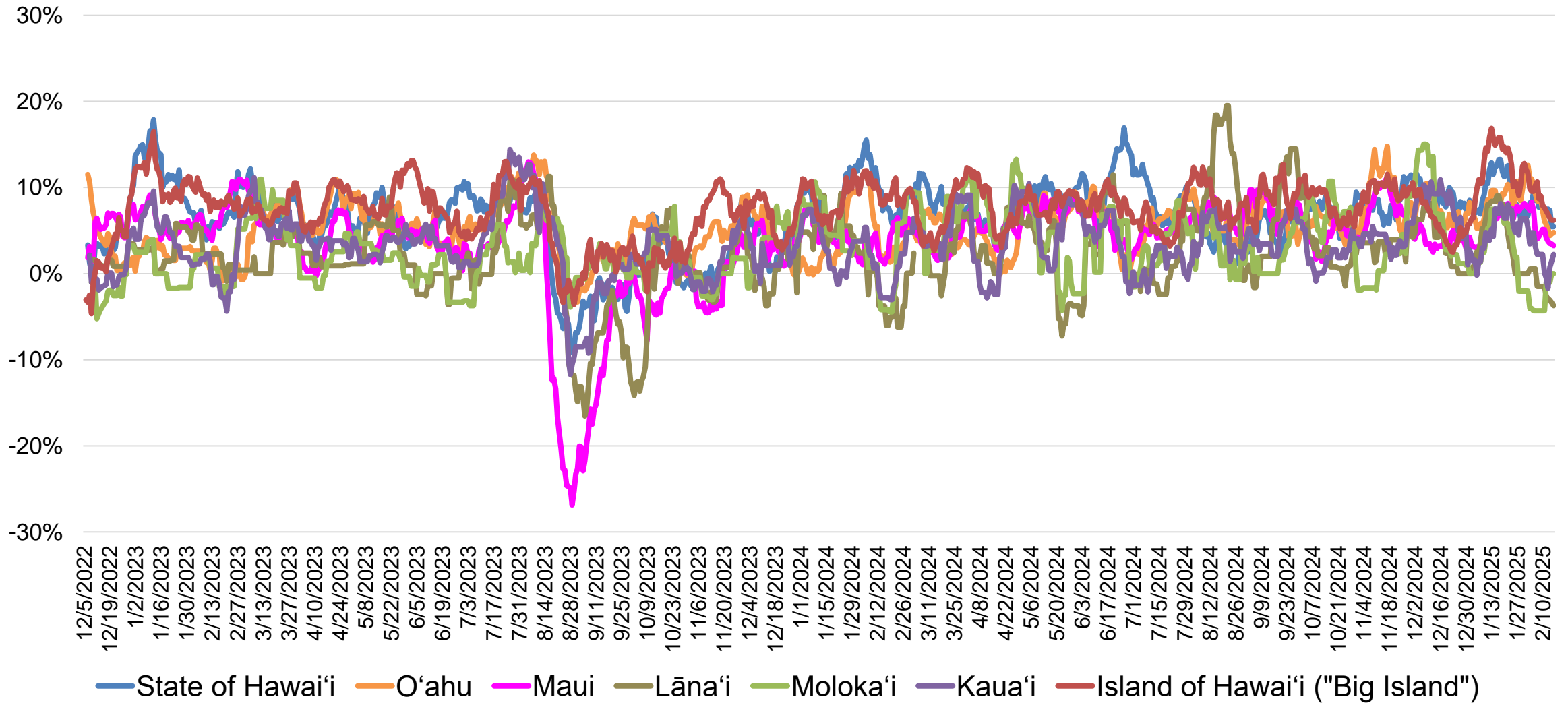


# Canada Destination Awareness Two-Week Moving Average



Source: Vision Insights Data as of February 18, 2025

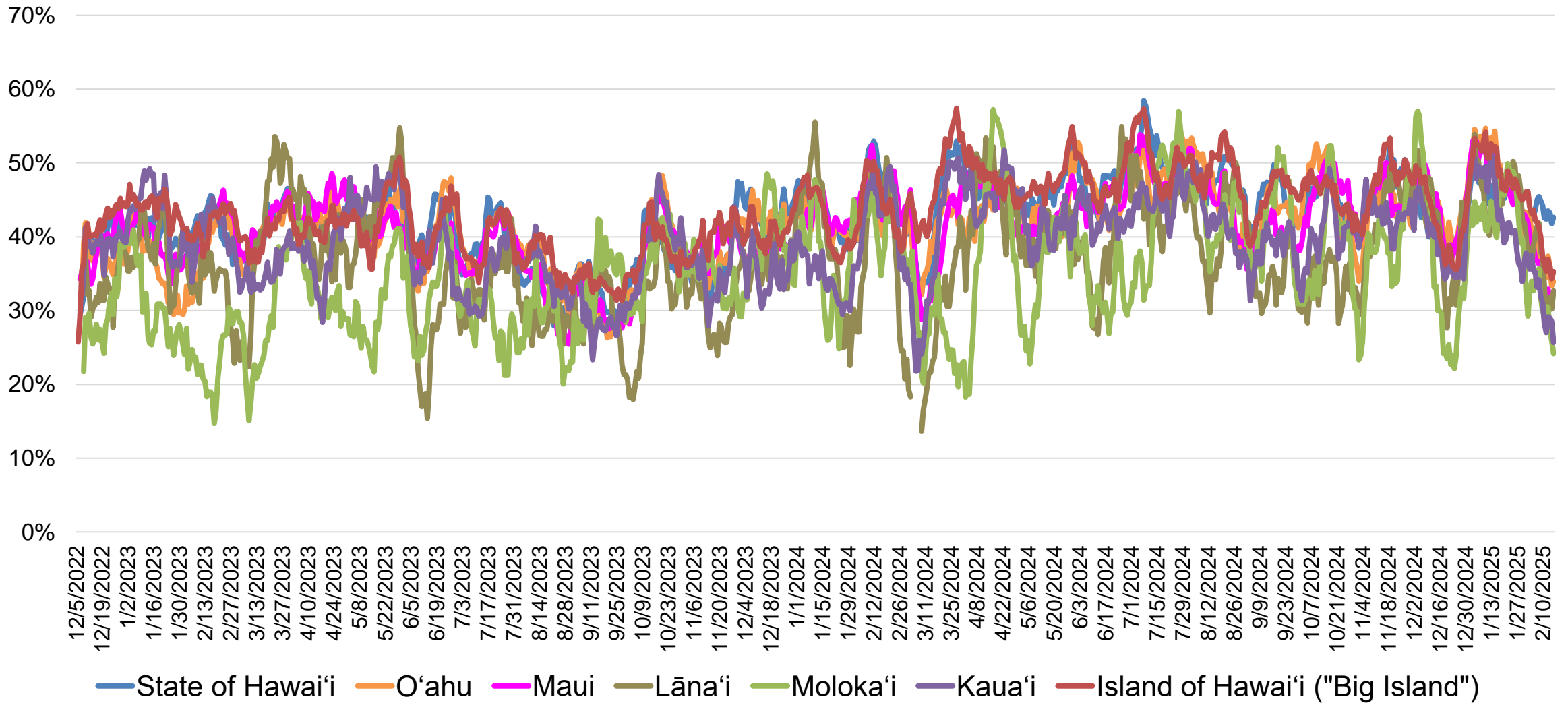
# Canada Chatter (Net) Two-Week Moving Average



Source: Vision Insights Data as of February 18, 2025

Samples for Lāna'i are limited

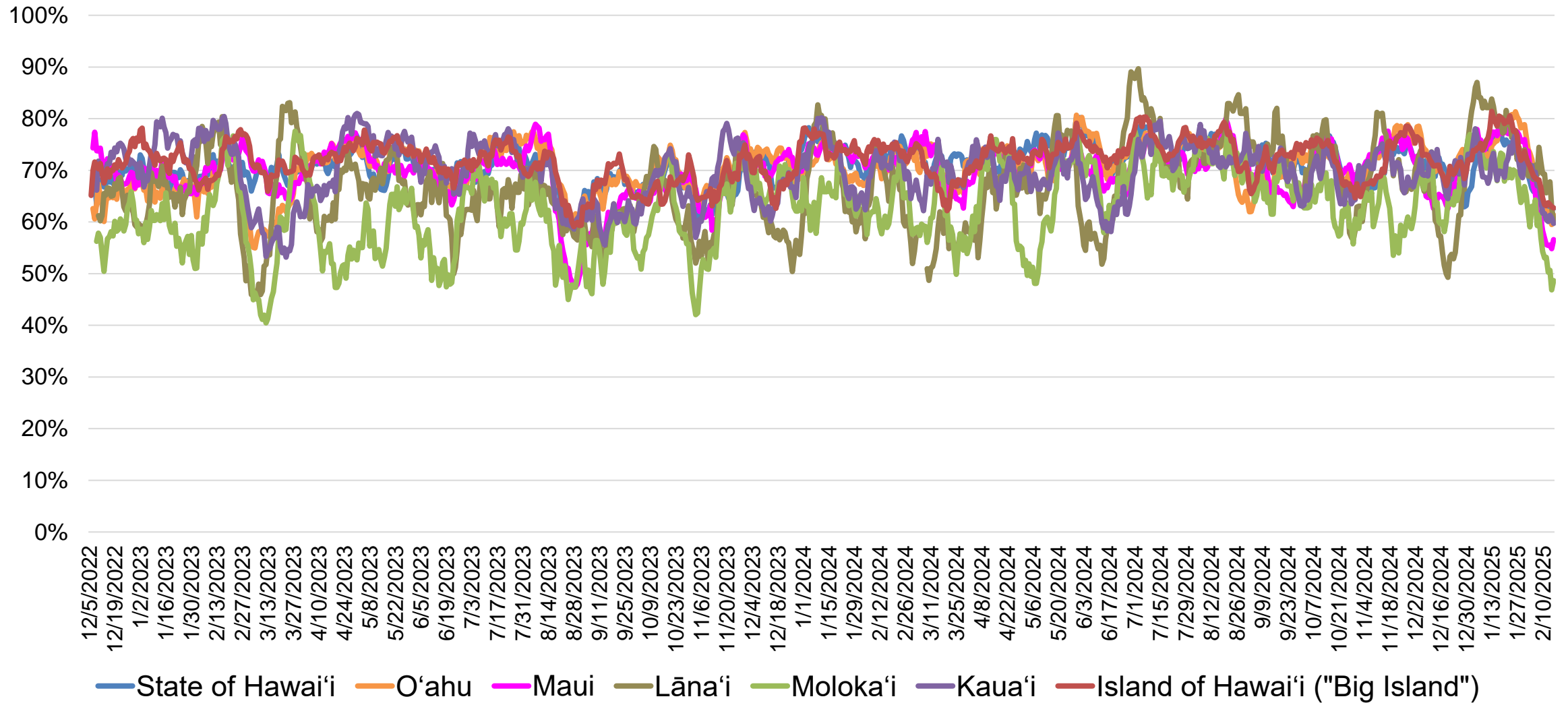
# Canada Consideration Two-Week Moving Average



Source: Vision Insights Data as of February 18, 2025

Samples for Lāna'i are limited

# Canada Favorability Two-Week Moving Average

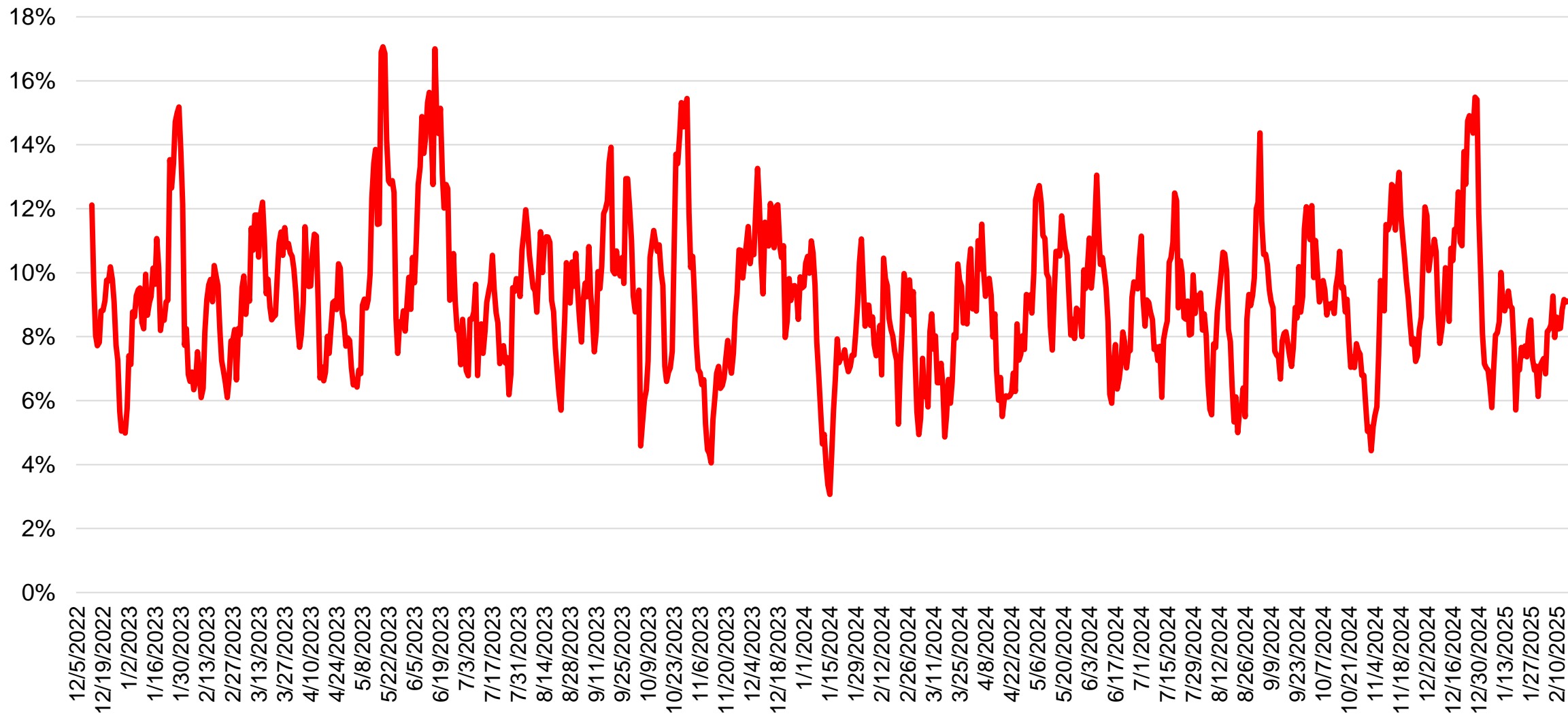


Source: Vision Insights Data as of February 18, 2025

Samples for Lāna'i are limited



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



Source: Vision Insights Data as of February 18, 2025

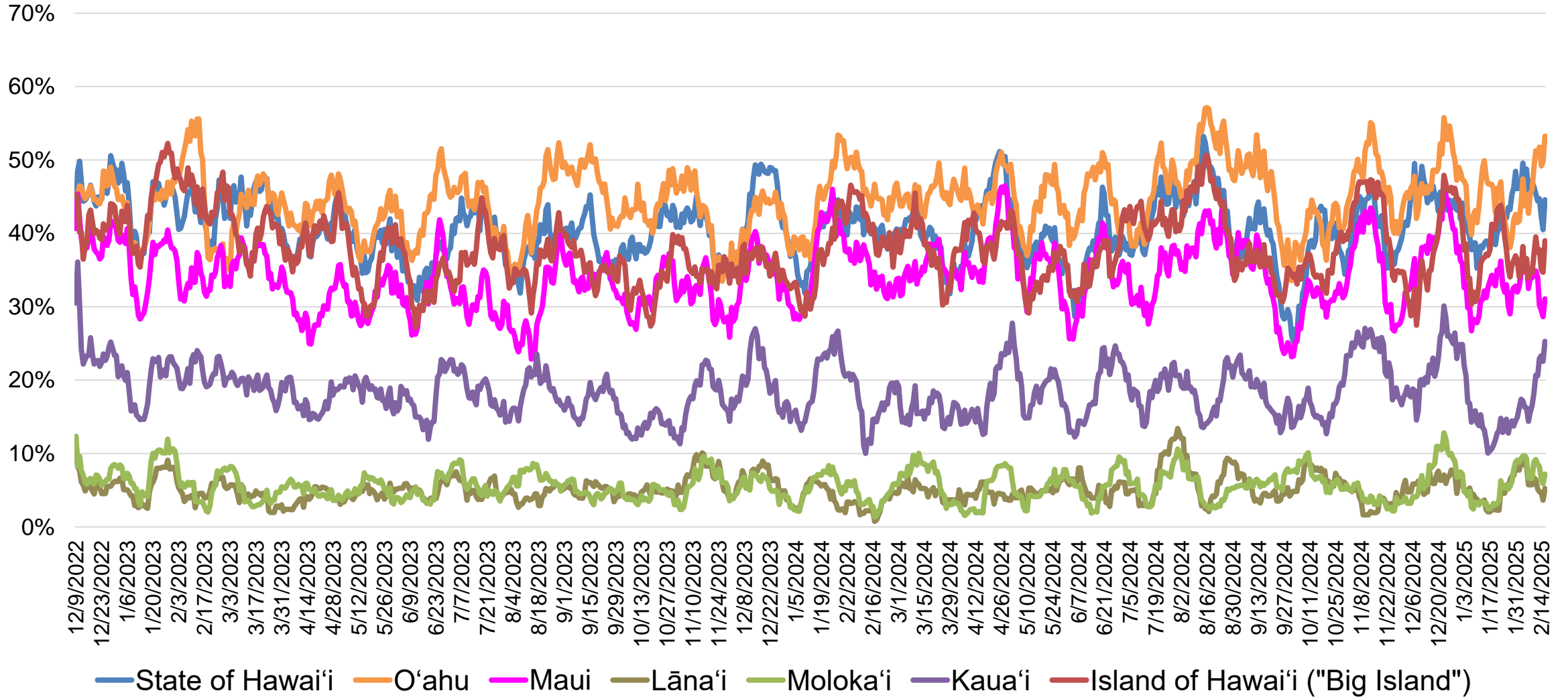


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# Japan Destination Brand Health Trends

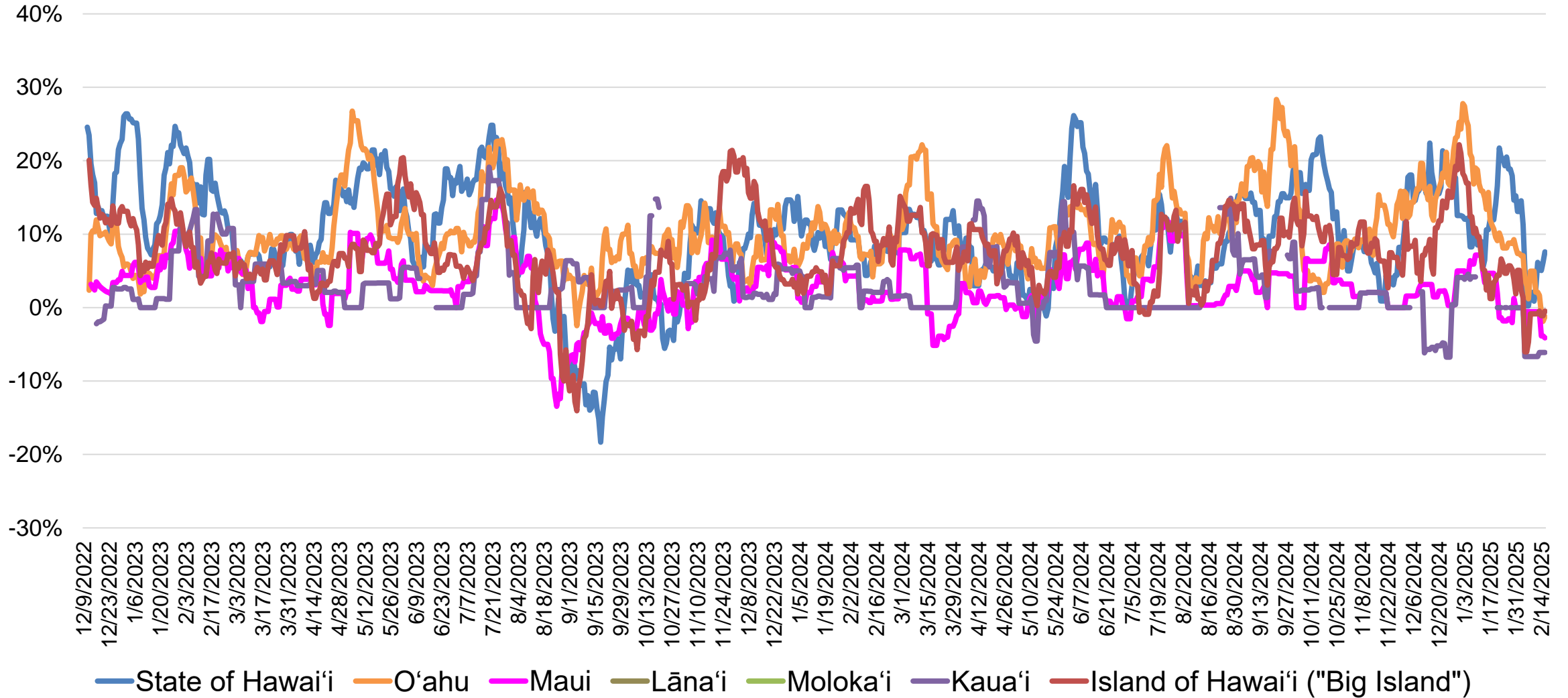


# Japan Destination Awareness Two-Week Moving Average



Source: Vision Insights Data as of February 18, 2025

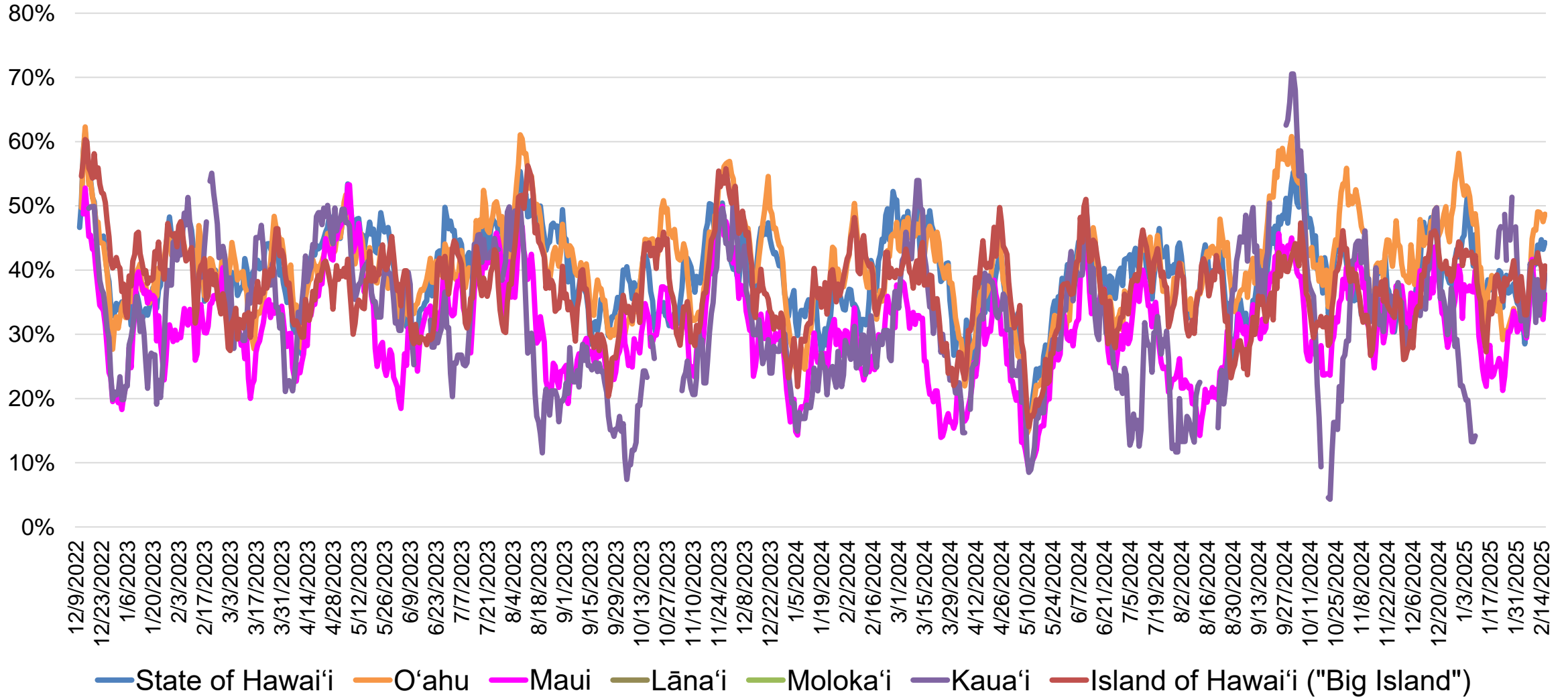
# Japan Chatter (Net) Two-Week Moving Average



Source: Vision Insights Data as of February 18, 2025

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

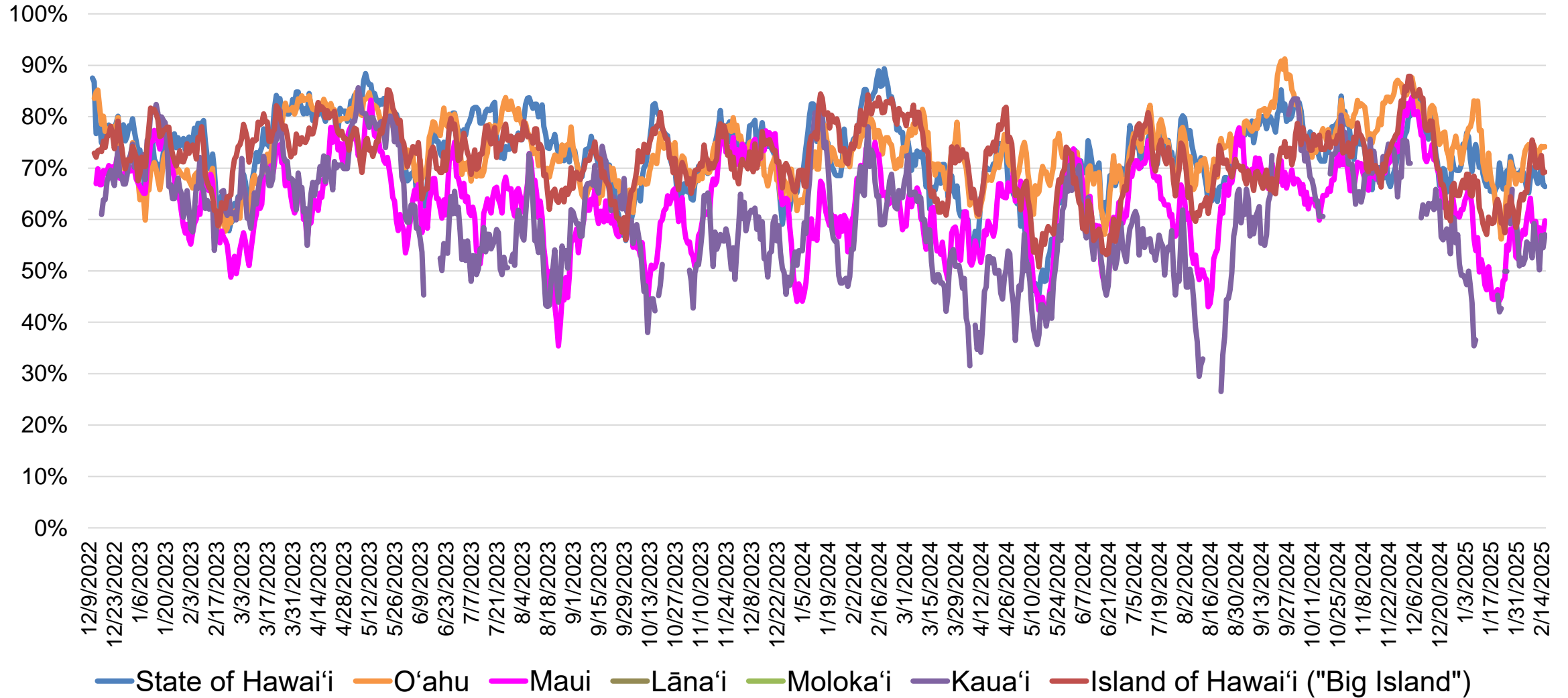
# Japan Consideration Two-Week Moving Average



Source: Vision Insights Data as of February 18, 2025

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

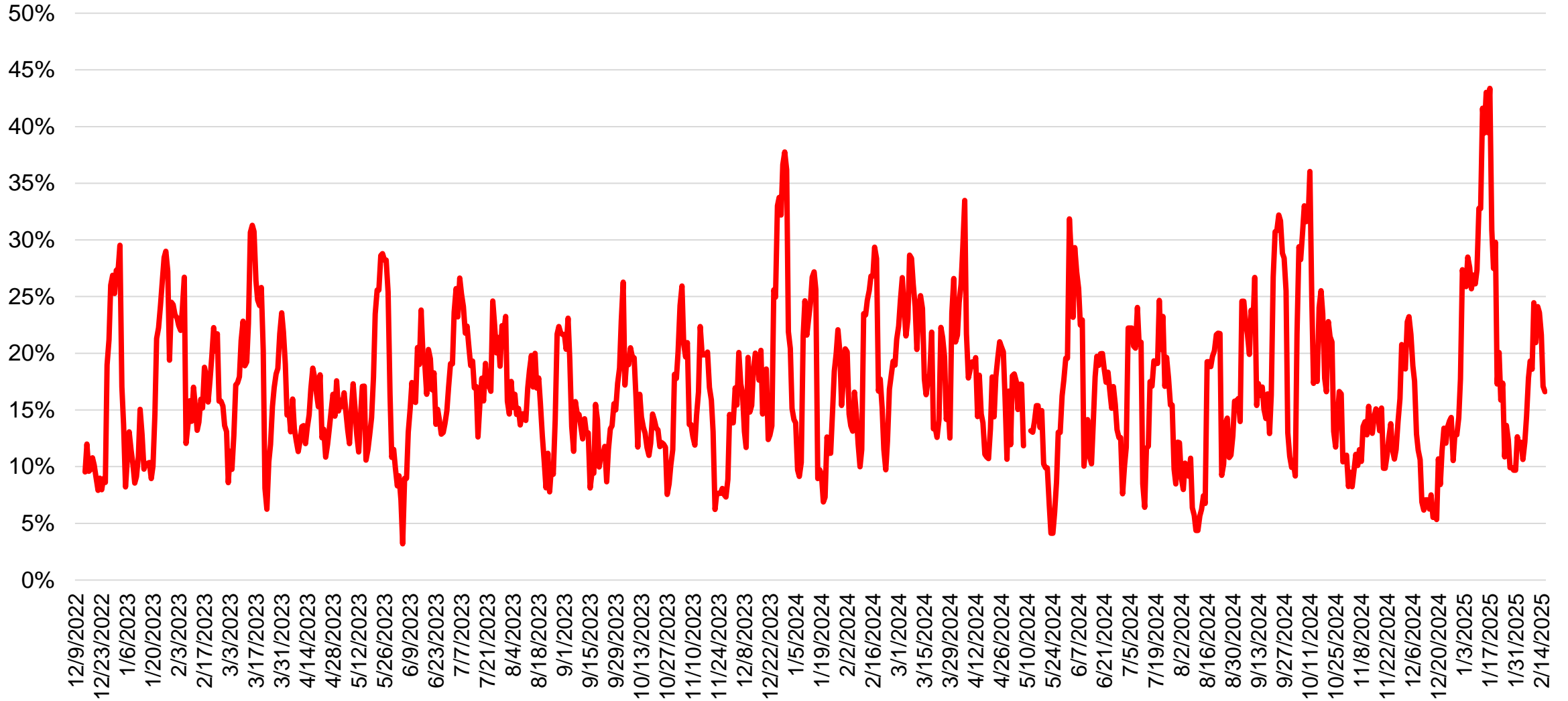
# Japan Favorability Two-Week Moving Average



Source: Vision Insights Data as of February 18, 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 February 18, 2025



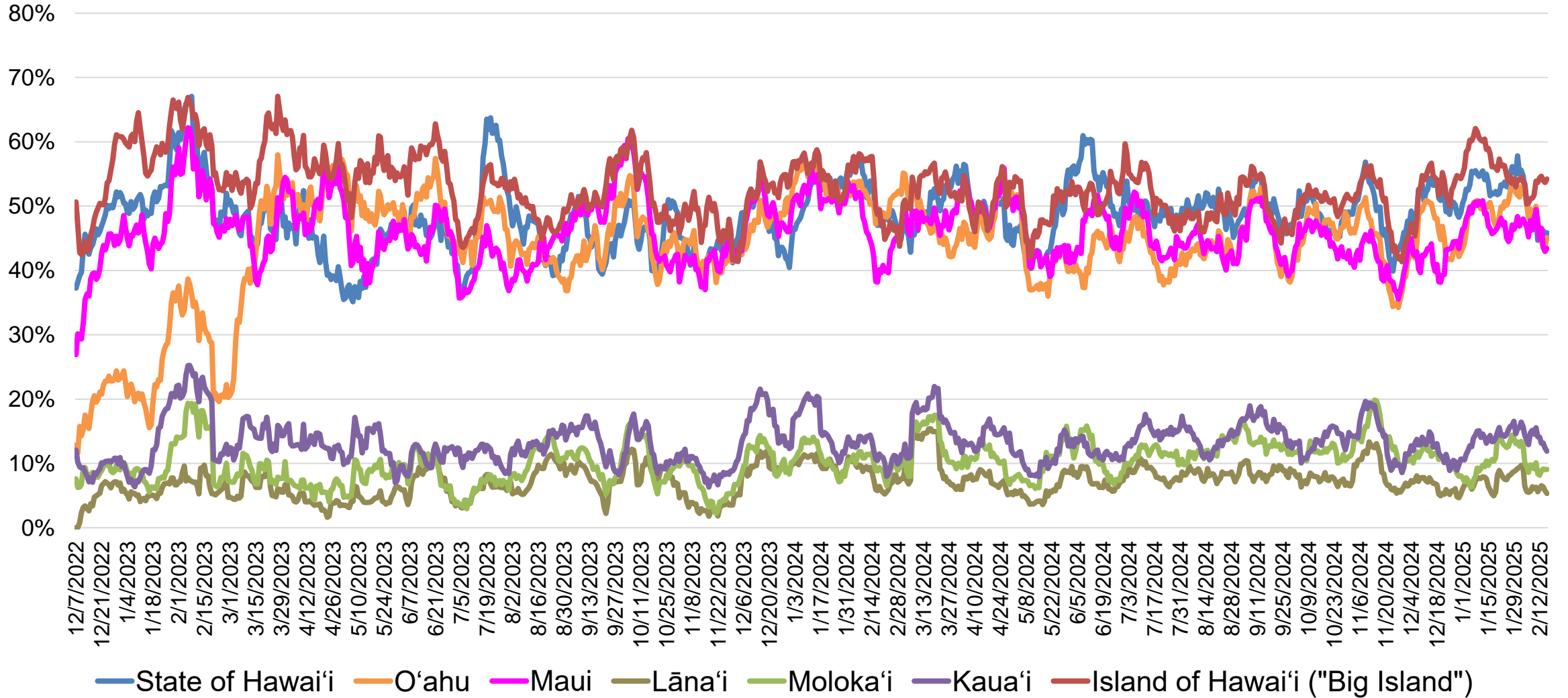
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# Australia Destination Brand Health Trends



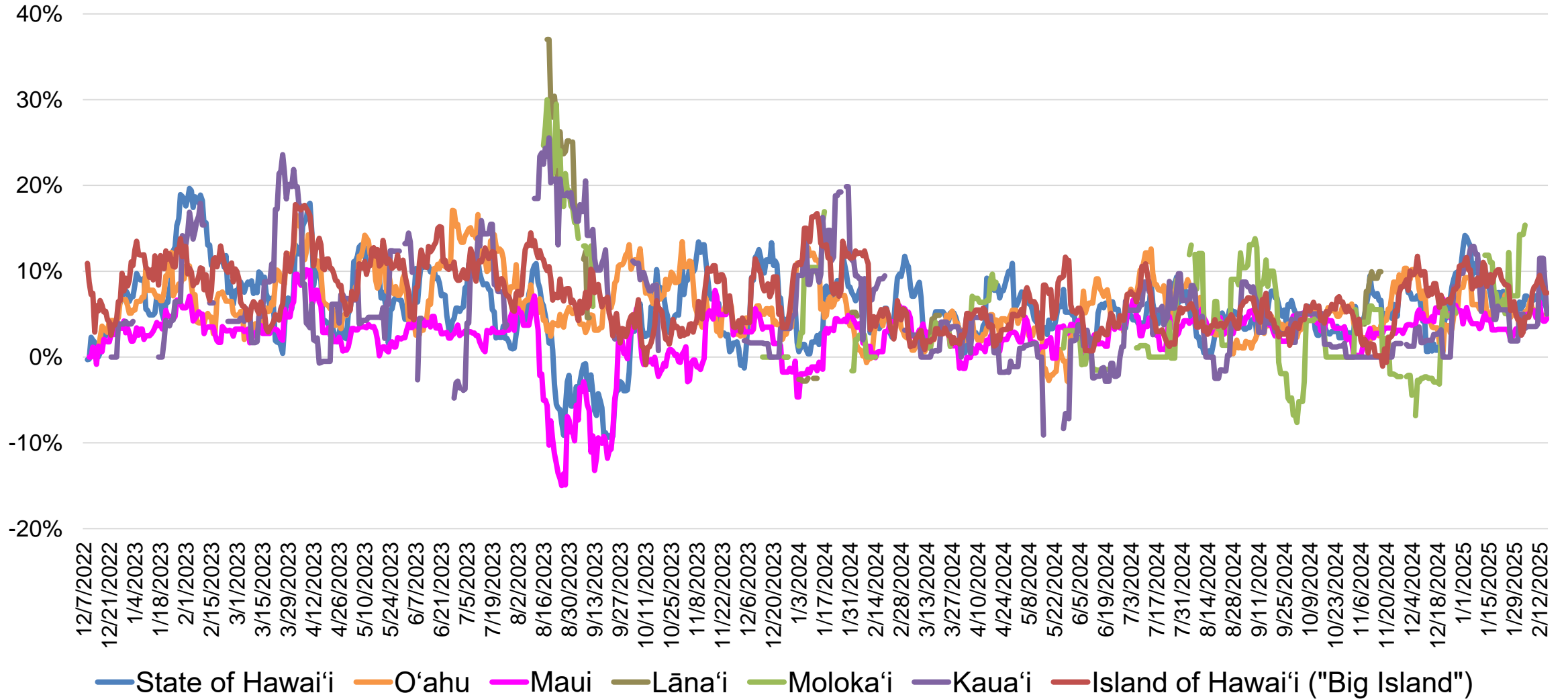


# Australia Destination Awareness Two-Week Moving Average



Source: Vision Insights Data as of February 18, 2025

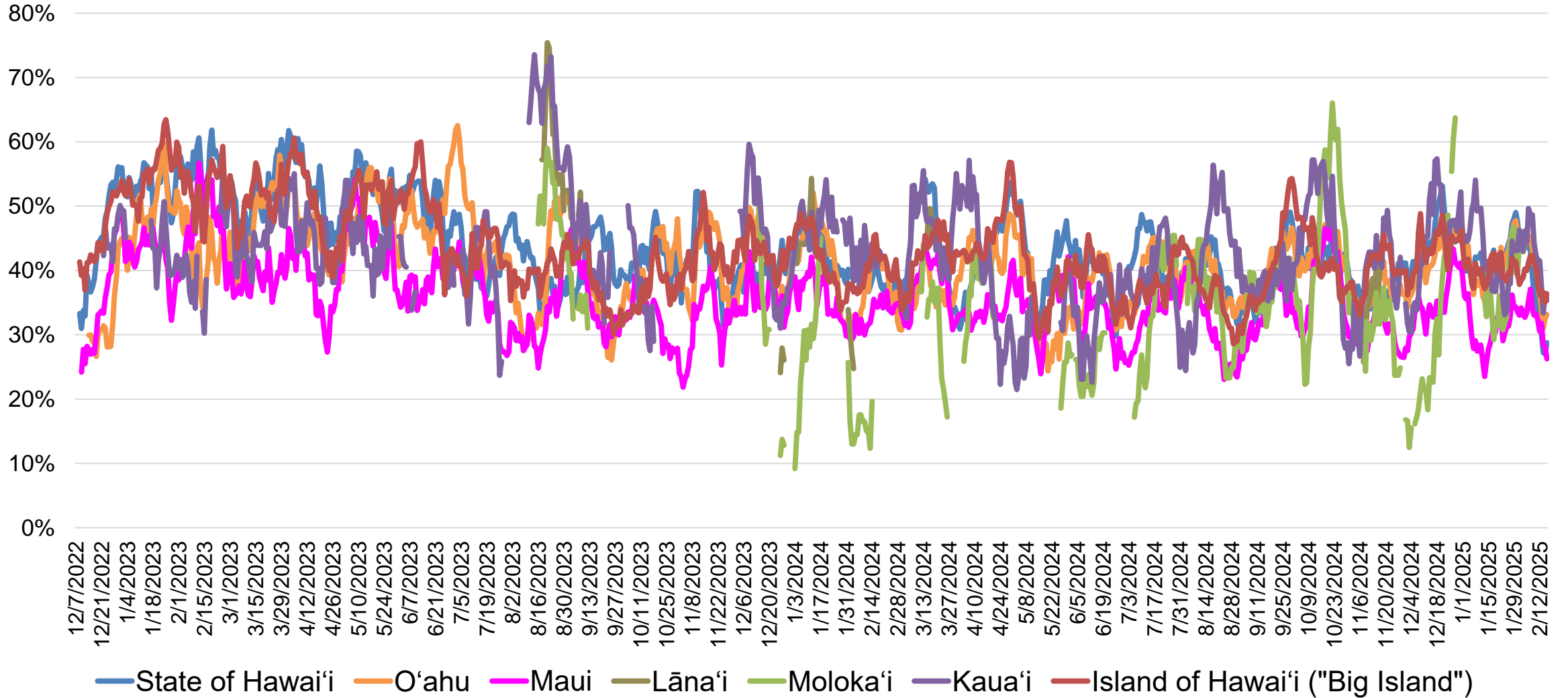
# Australia Chatter (Net) Two-Week Moving Average



Source: Vision Insights Data as of February 18, 2025

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

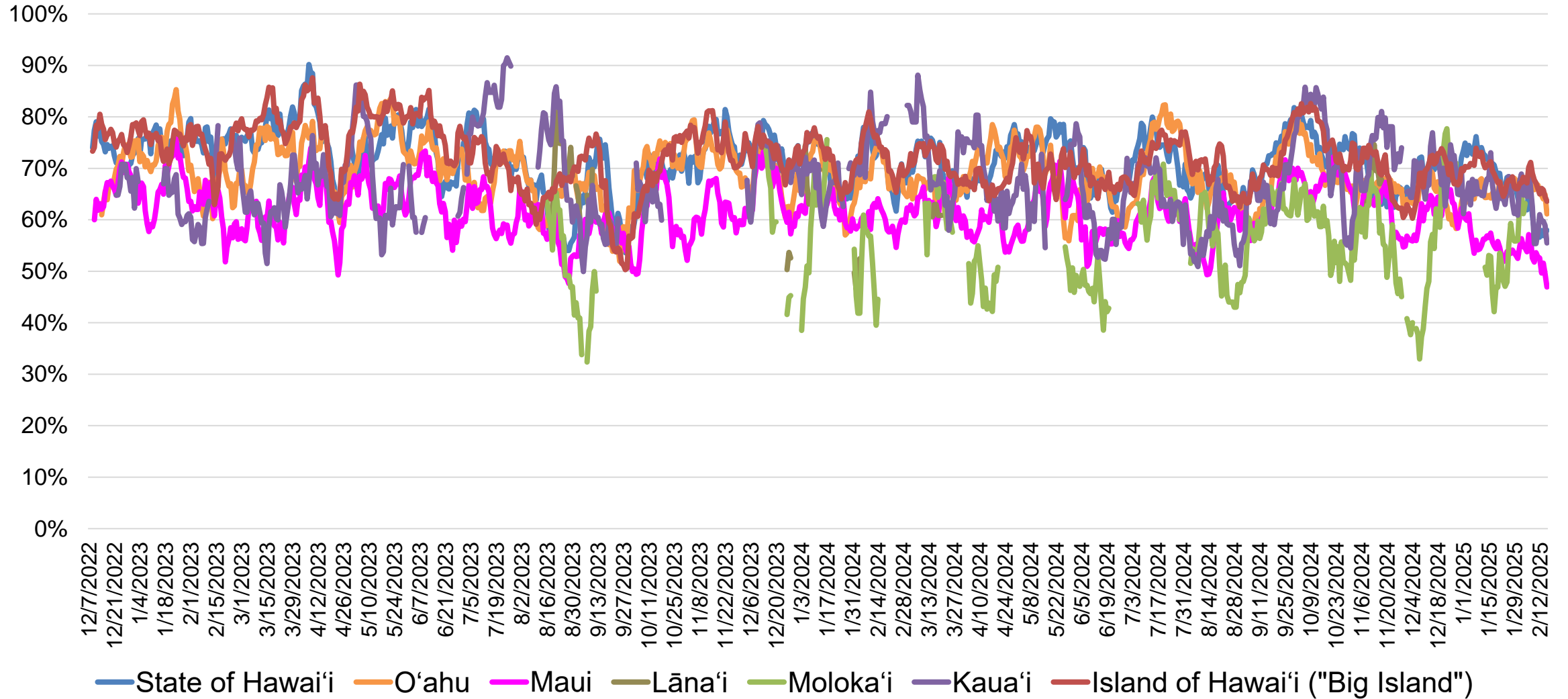
# Australia Consideration Two-Week Moving Average



Source: Vision Insights Data as of February 18, 2025

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

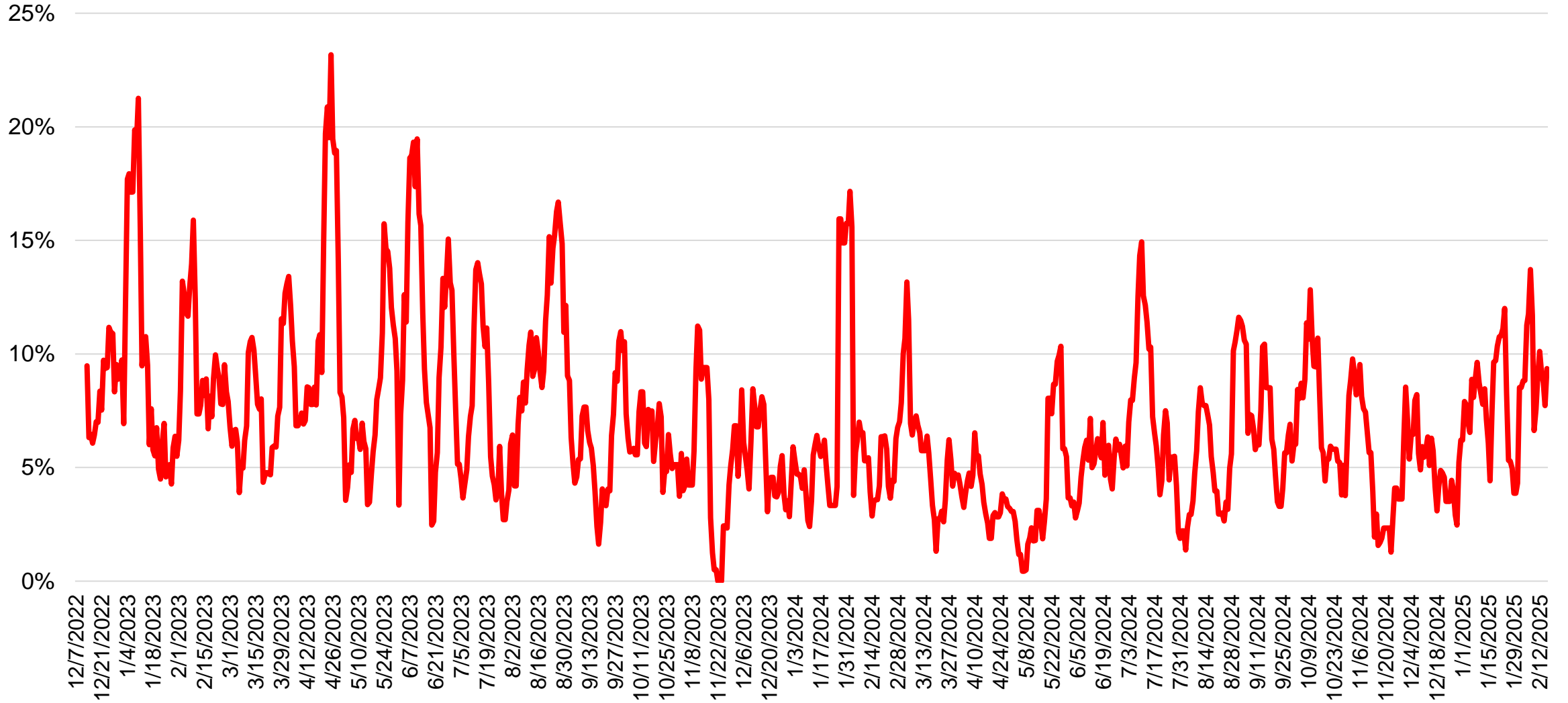
# Australia Favorability Two-Week Moving Average



Source: Vision Insights Data as of February 18, 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 February 18, 2025

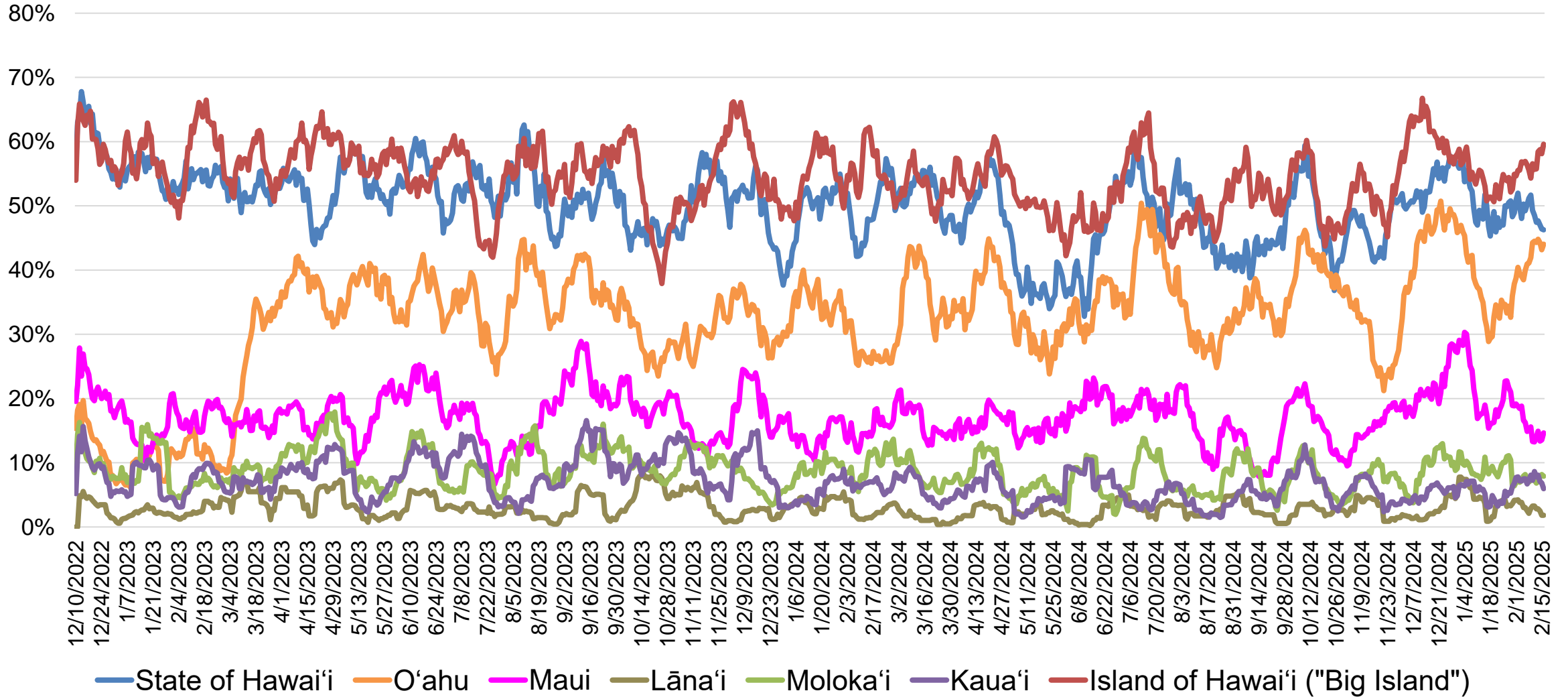


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# **Korea Destination Brand Health Trends**

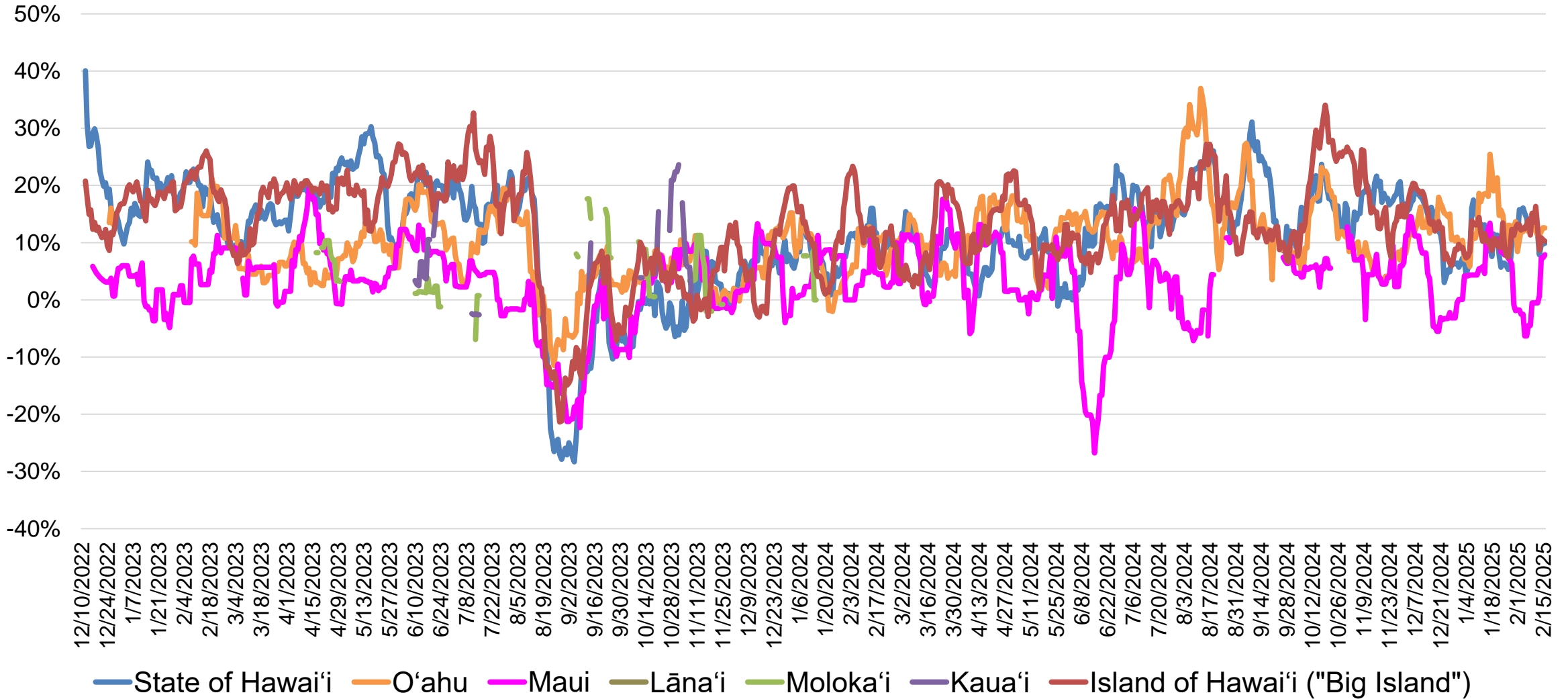


# Korea Destination Awareness Two-Week Moving Average



Source: Vision Insights Data as of February 18, 2025

# Korea Chatter (Net) Two-Week Moving Average

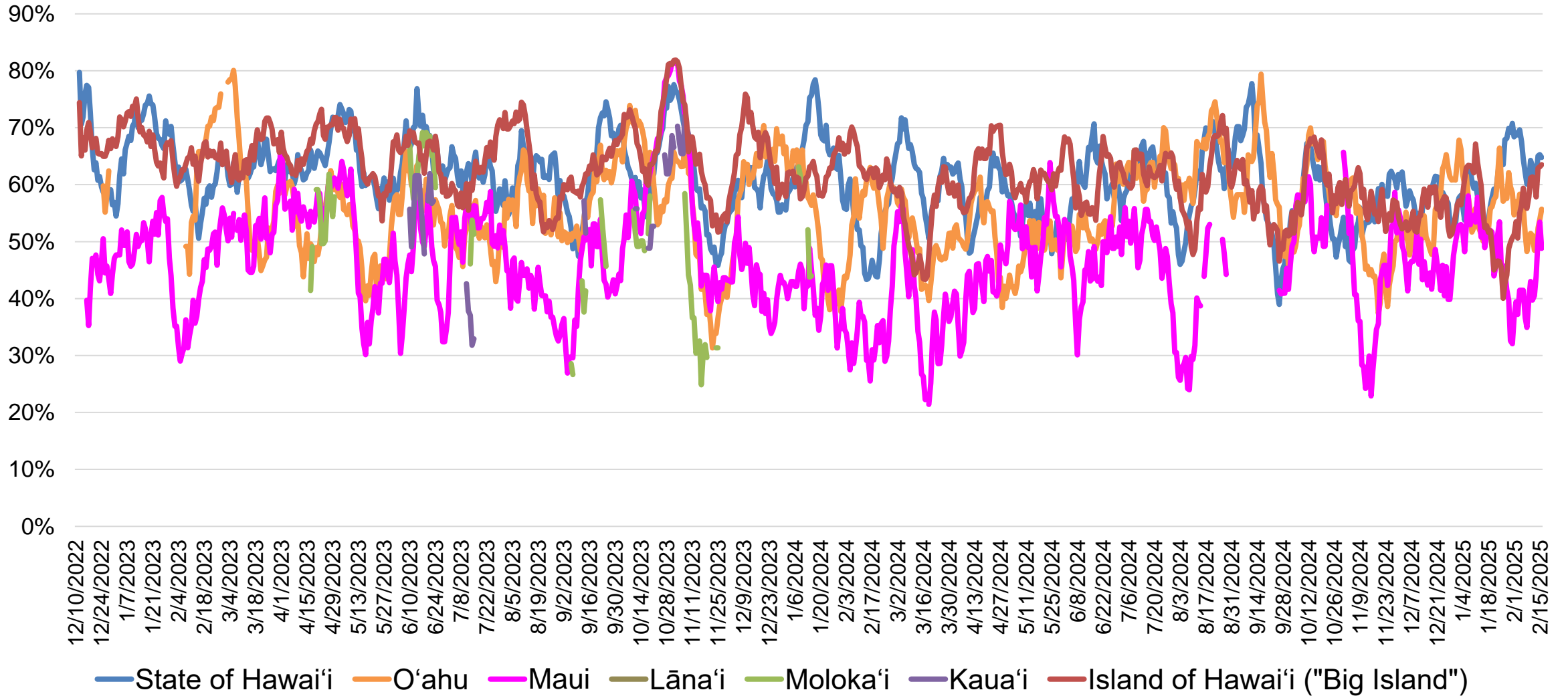


Source: Vision Insights Data as of February 18, 2025

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



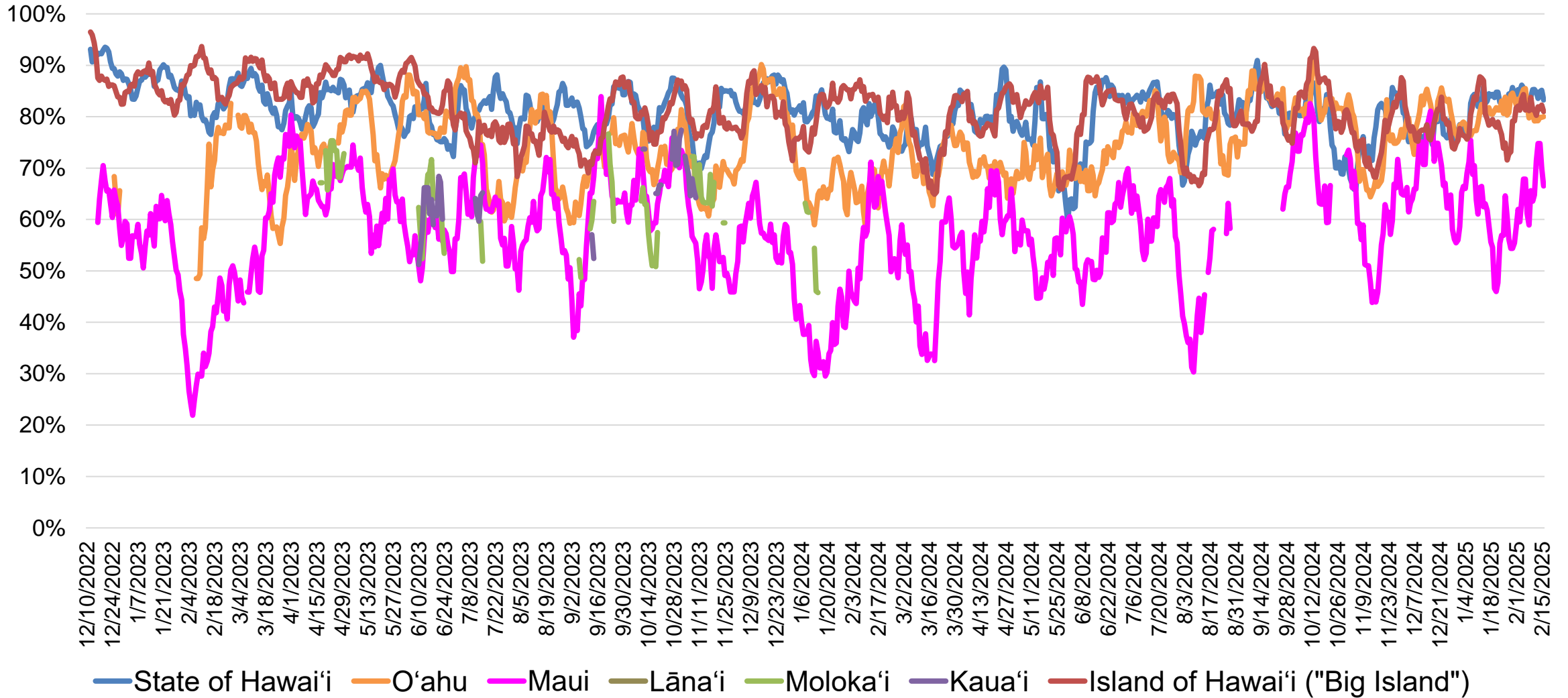
# Korea Consideration Two-Week Moving Average



Source: Vision Insights Data as of February 18, 2025

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

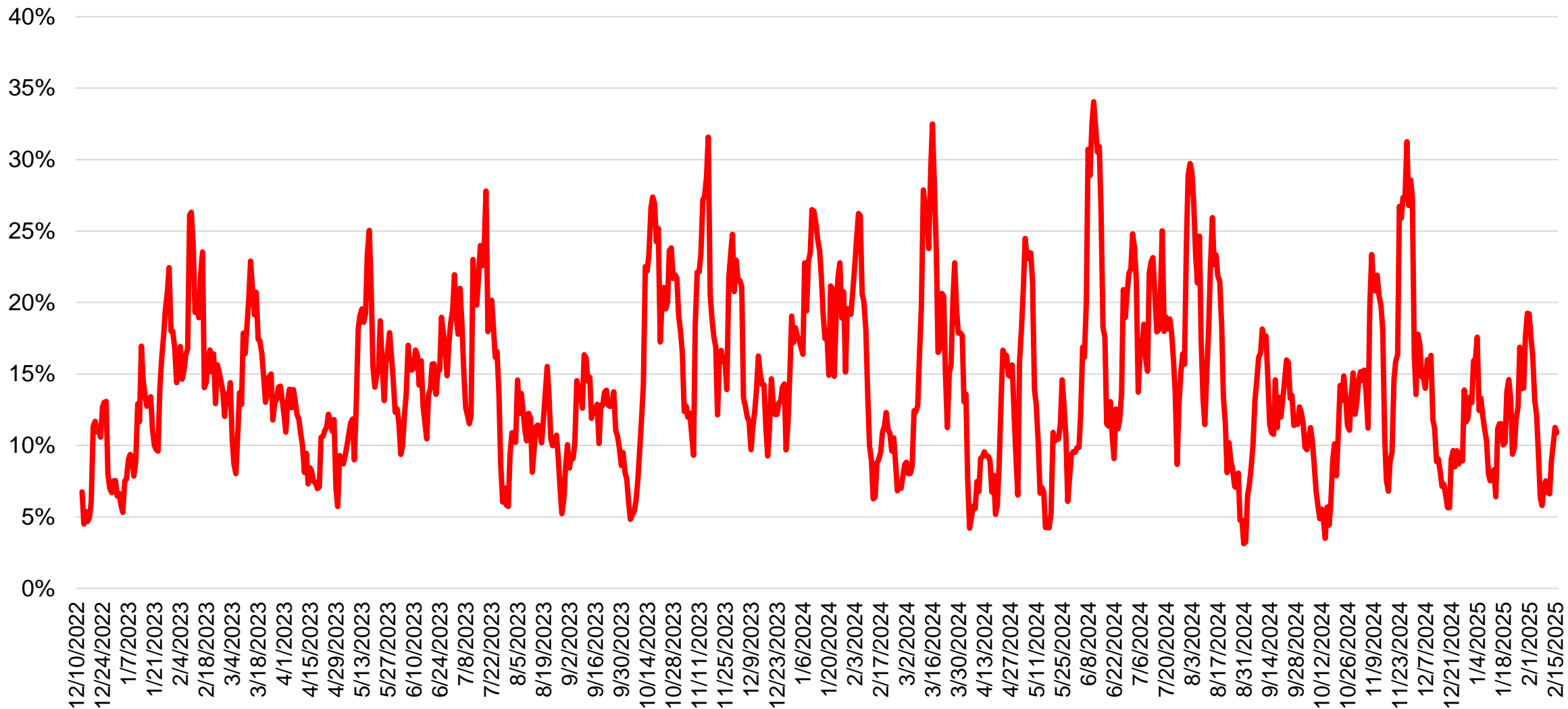
# Korea Favorability Two-Week Moving Average



Source: Vision Insights Data as of February 18, 2025

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 February 18, 2025