



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

# **Vision Insights**

# **Destination Brand Health Trends**

March 4, 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 re-  
opening West  
Maui to visitors  
starting  
October 8,  
2023

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

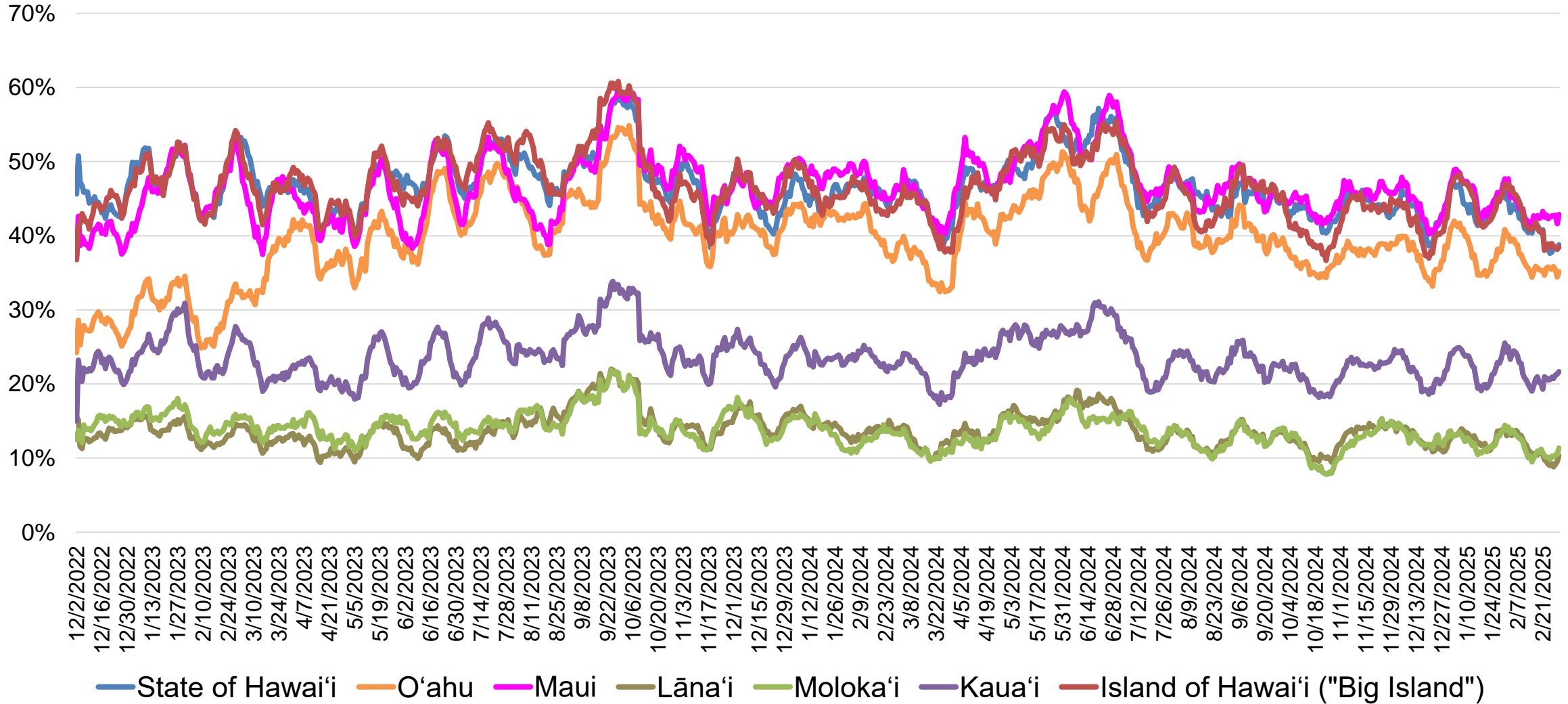


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# United States Destination Brand Health Trends

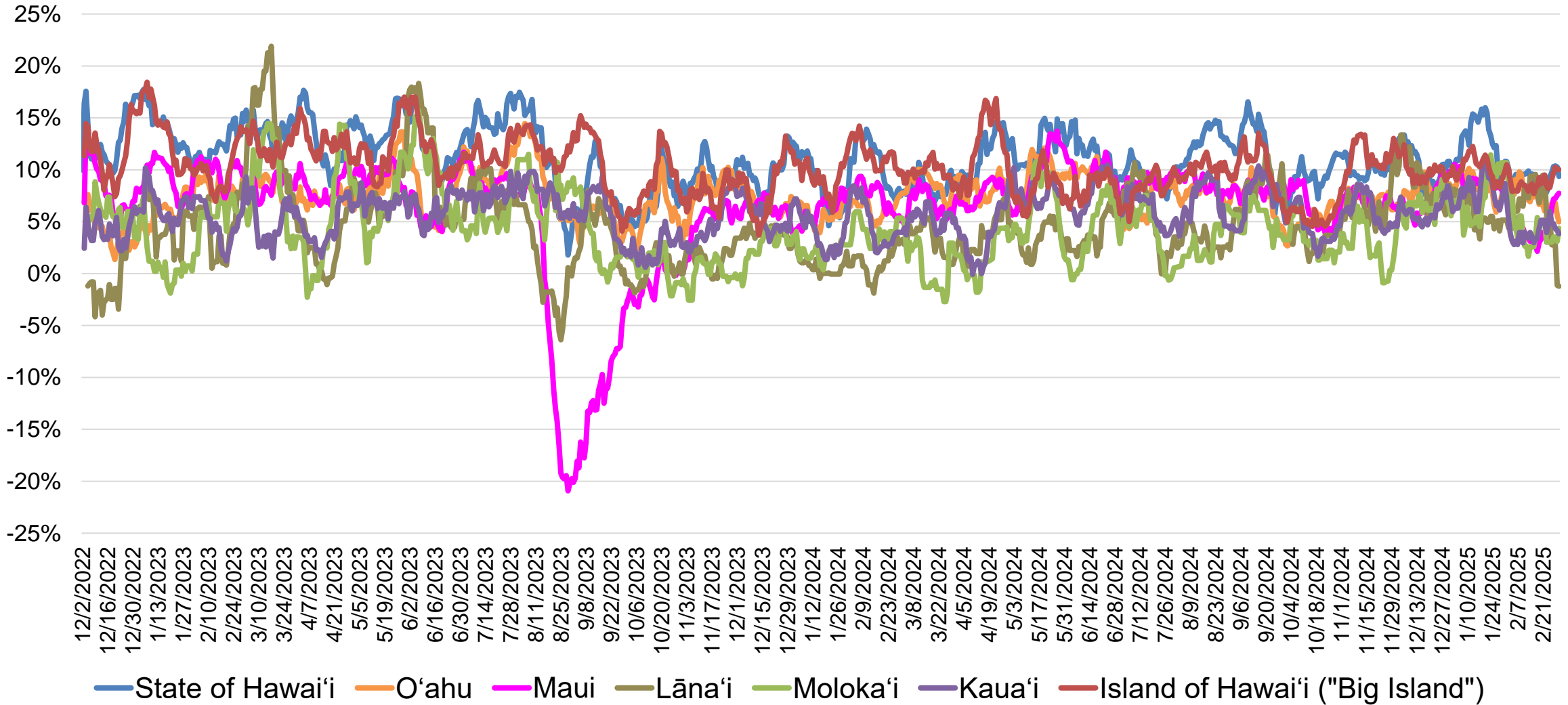


# U.S. Destination Awareness Two-Week Moving Average



Source: Vision Insights Data as of March 4, 2025

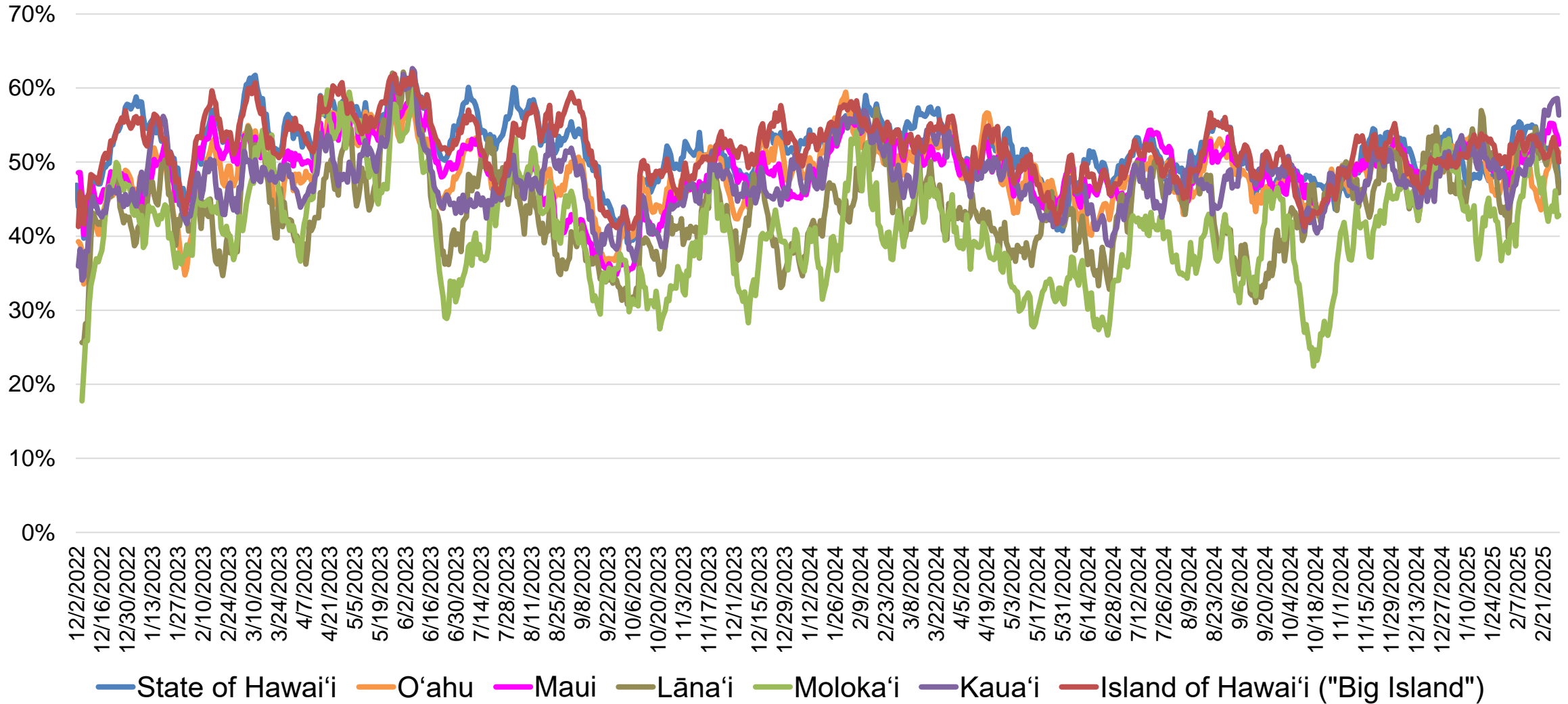
# U.S. Chatter (Net) Two-Week Moving Average



Source: Vision Insights Data as of March 4, 2025

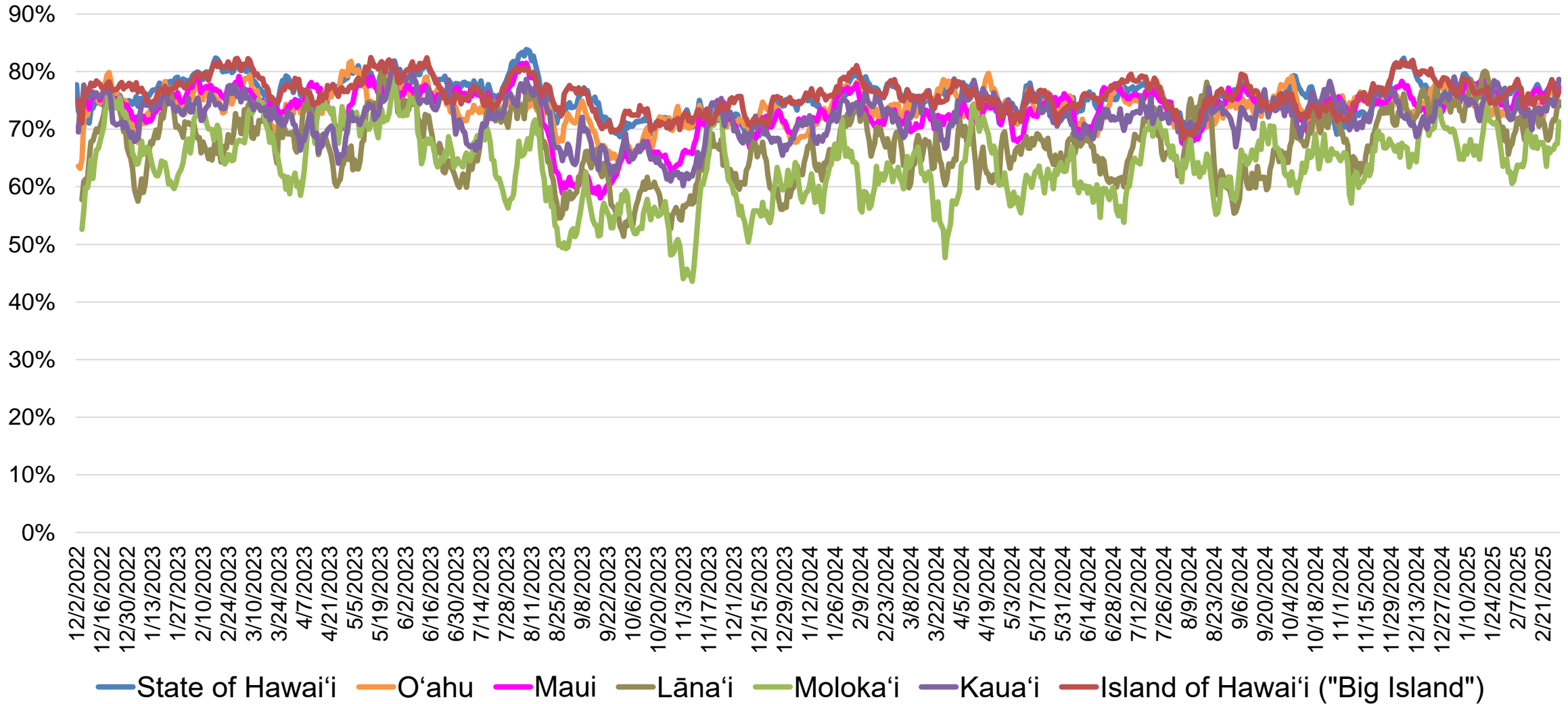


# U.S. Consideration Two-Week Moving Average



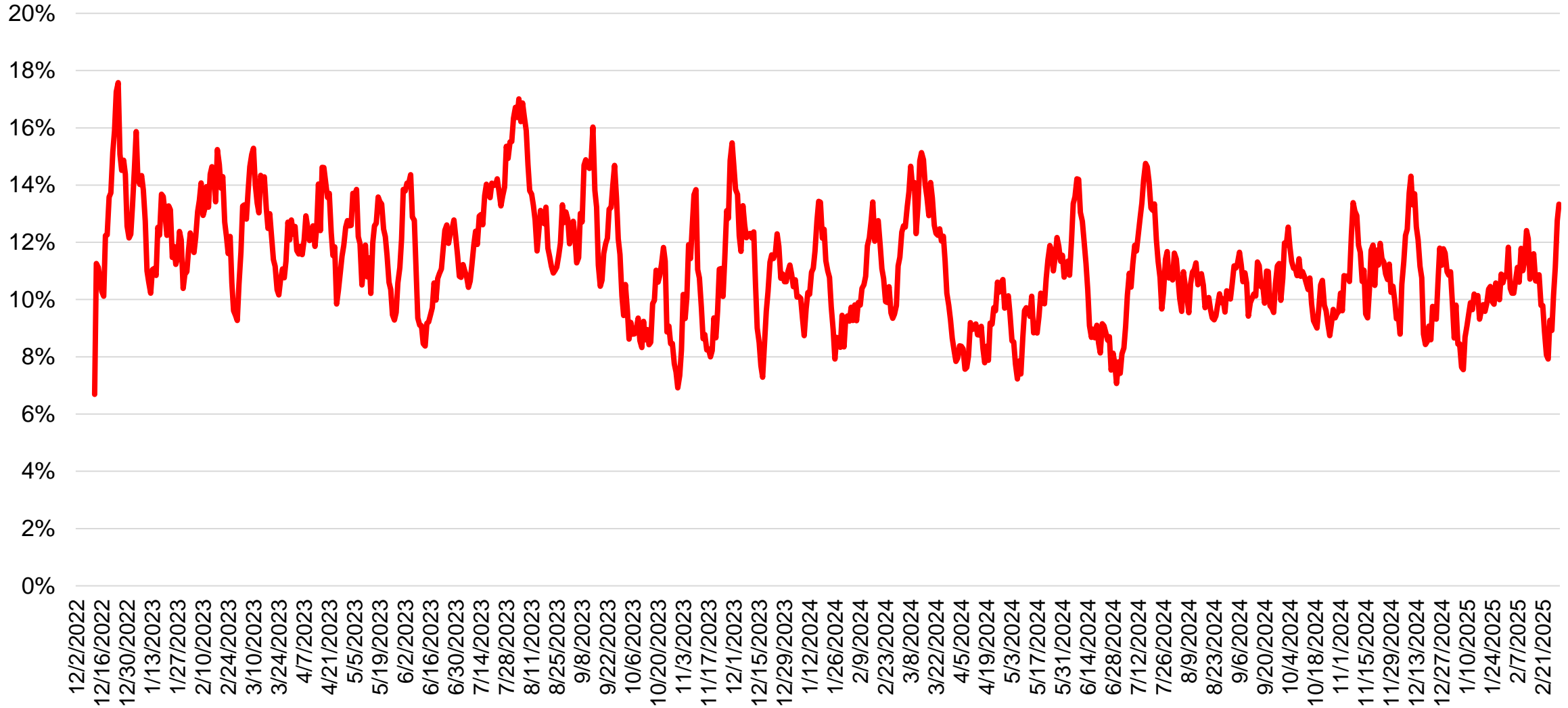
Source: Vision Insights Data as of March 4, 2025

# U.S. Favorability Two-Week Moving Average



Source: Vision Insights Data as of March 4, 2025

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



Source: Vision Insights Data as of March 4, 2025

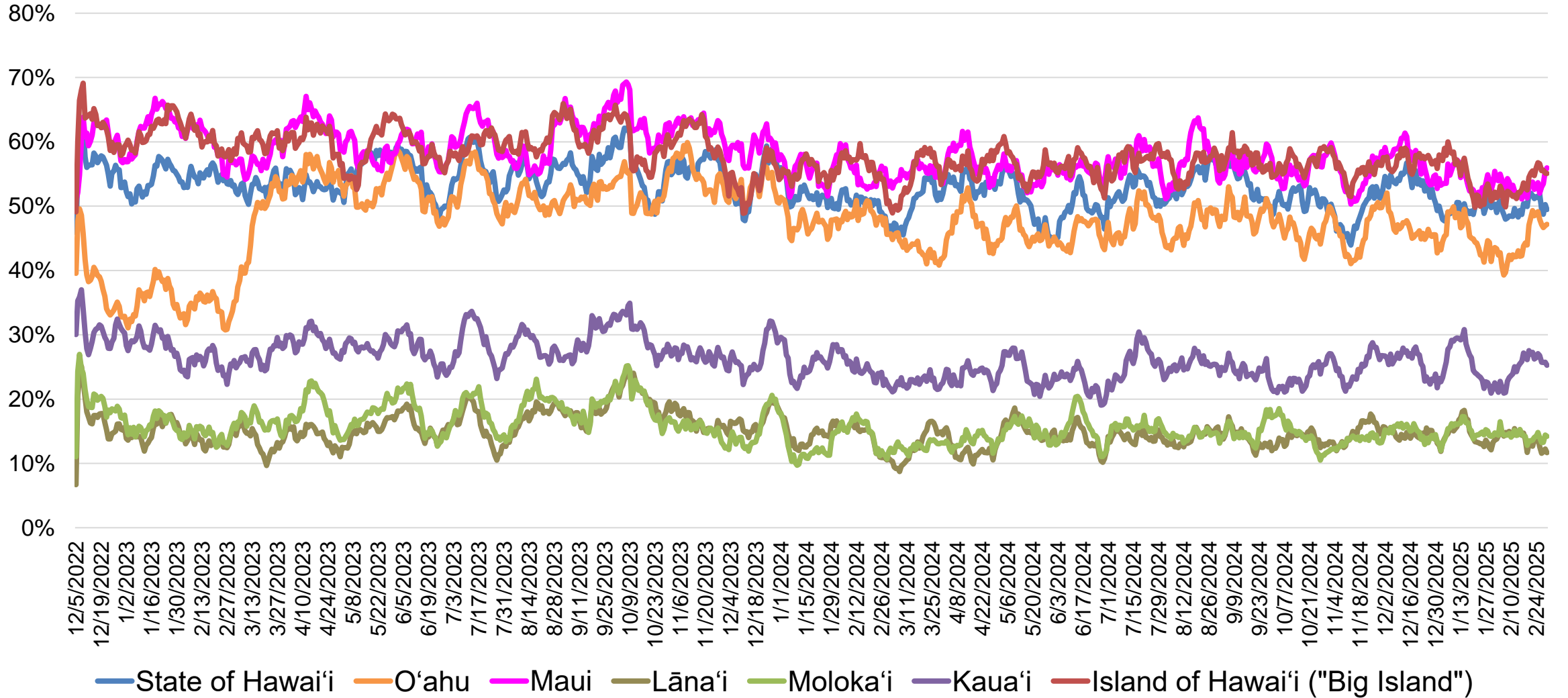


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# Canada Destination Brand Health Trends

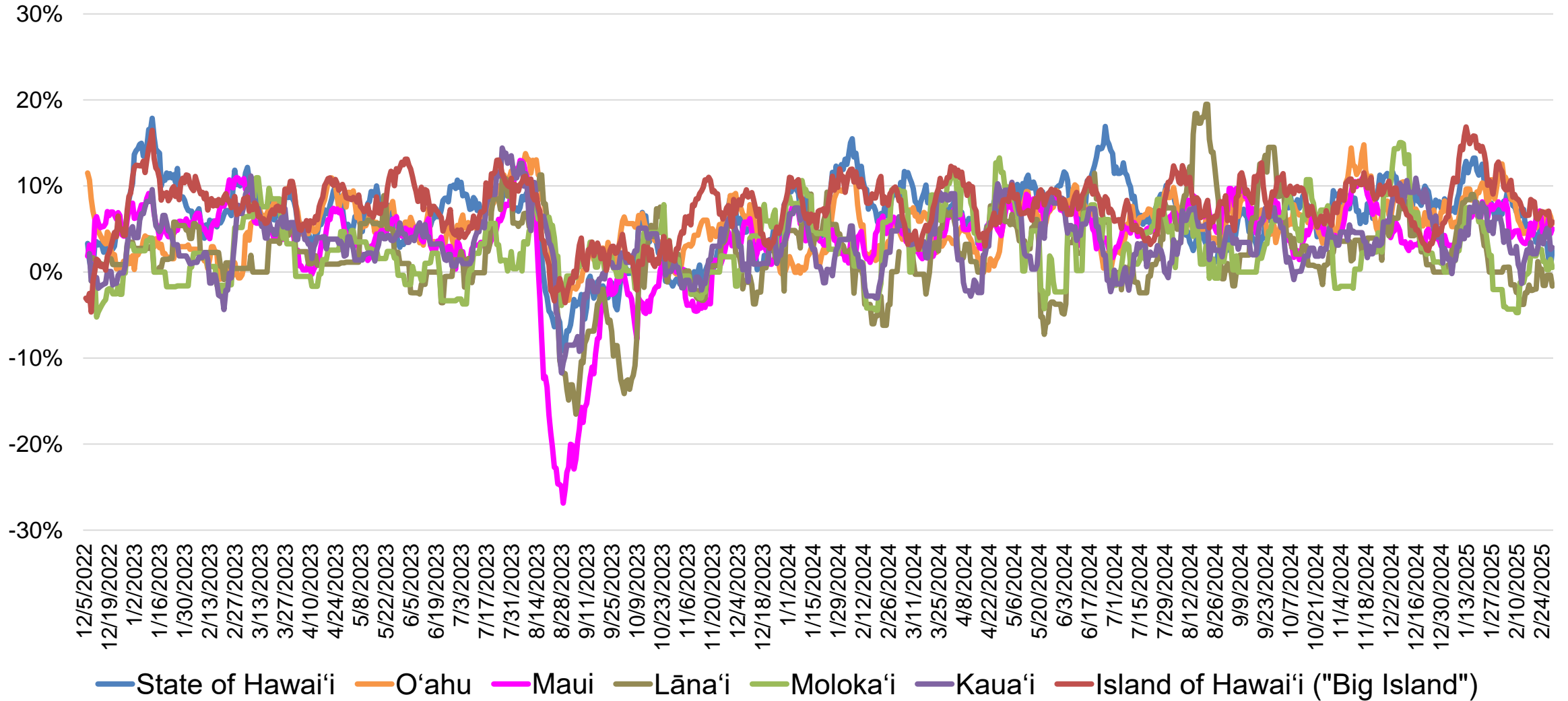


# Canada Destination Awareness Two-Week Moving Average



Source: Vision Insights Data as of March 4, 2025

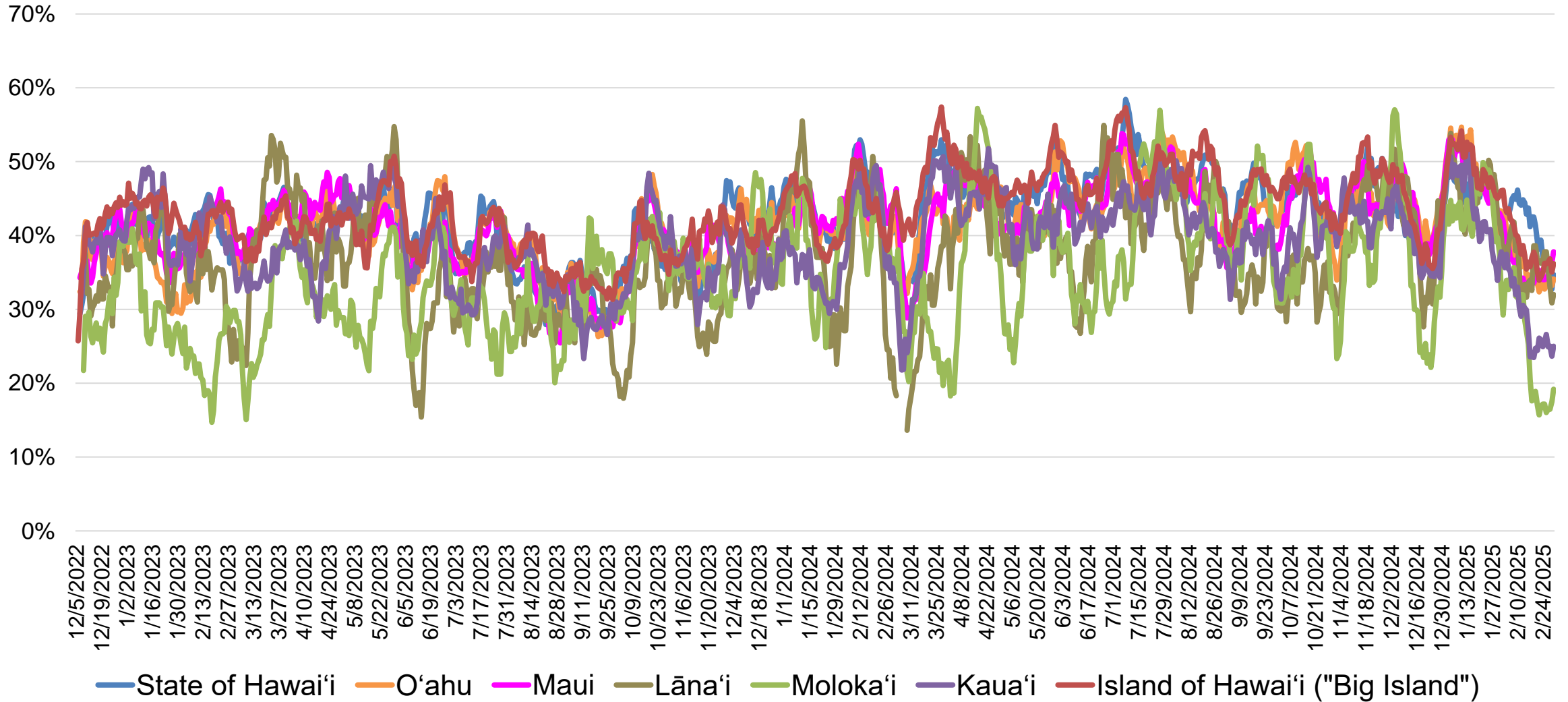
# Canada Chatter (Net) Two-Week Moving Average



Source: Vision Insights Data as of March 4, 2025

Samples for Lāna'i are limited

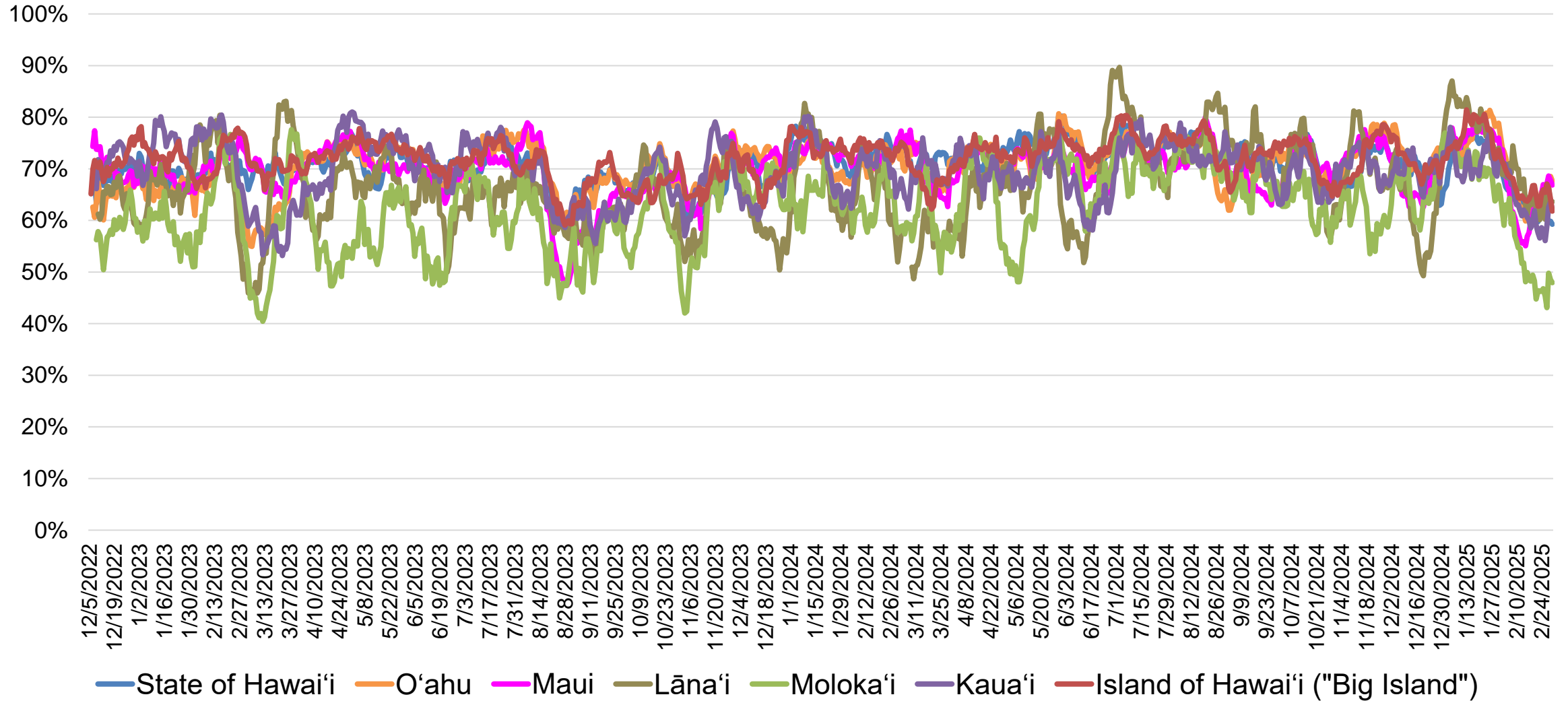
# Canada Consideration Two-Week Moving Average



Source: Vision Insights Data as of March 4, 2025

Samples for Lāna'i are limited

# Canada Favorability Two-Week Moving Average

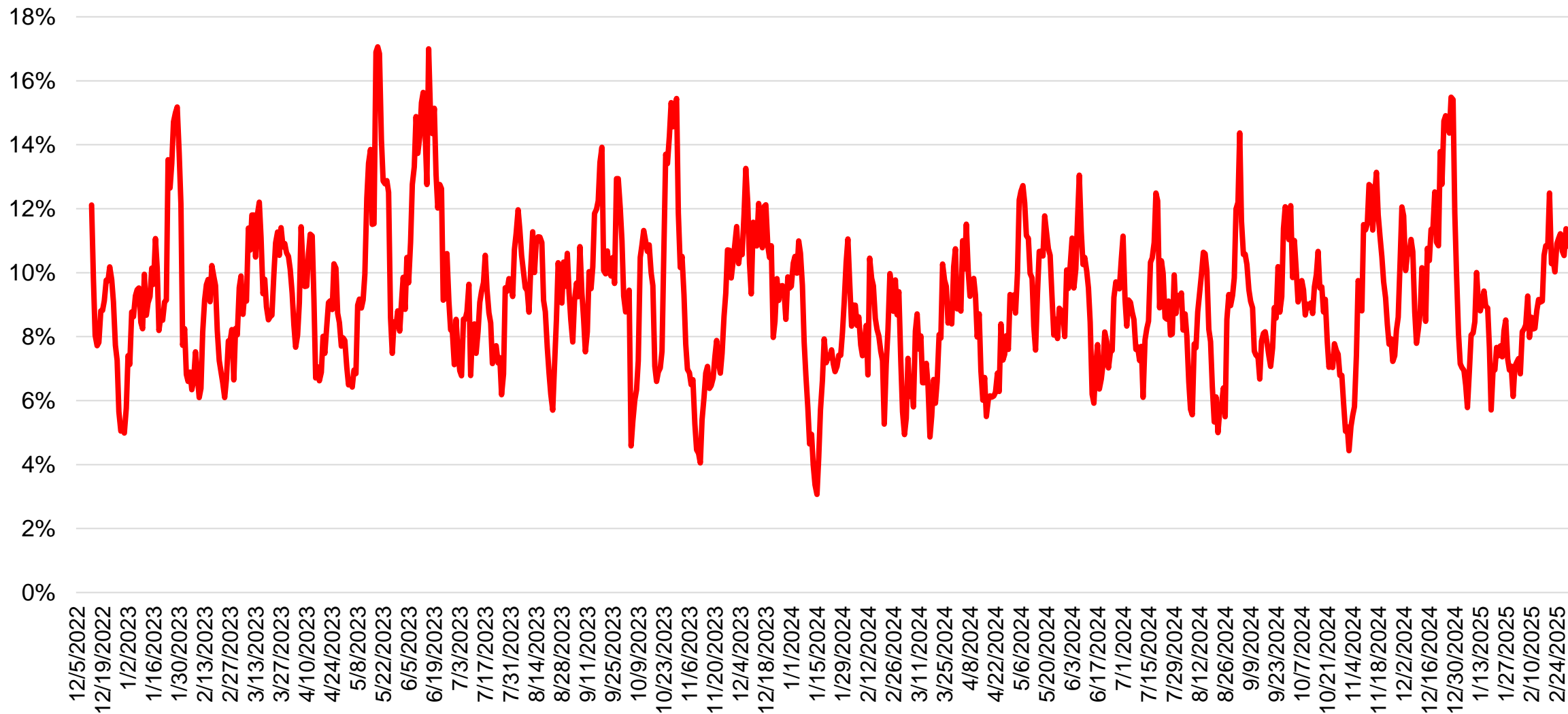


Source: Vision Insights Data as of March 4, 2025

Samples for Lāna'i are limited



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



Source: Vision Insights Data as of March 4, 2025

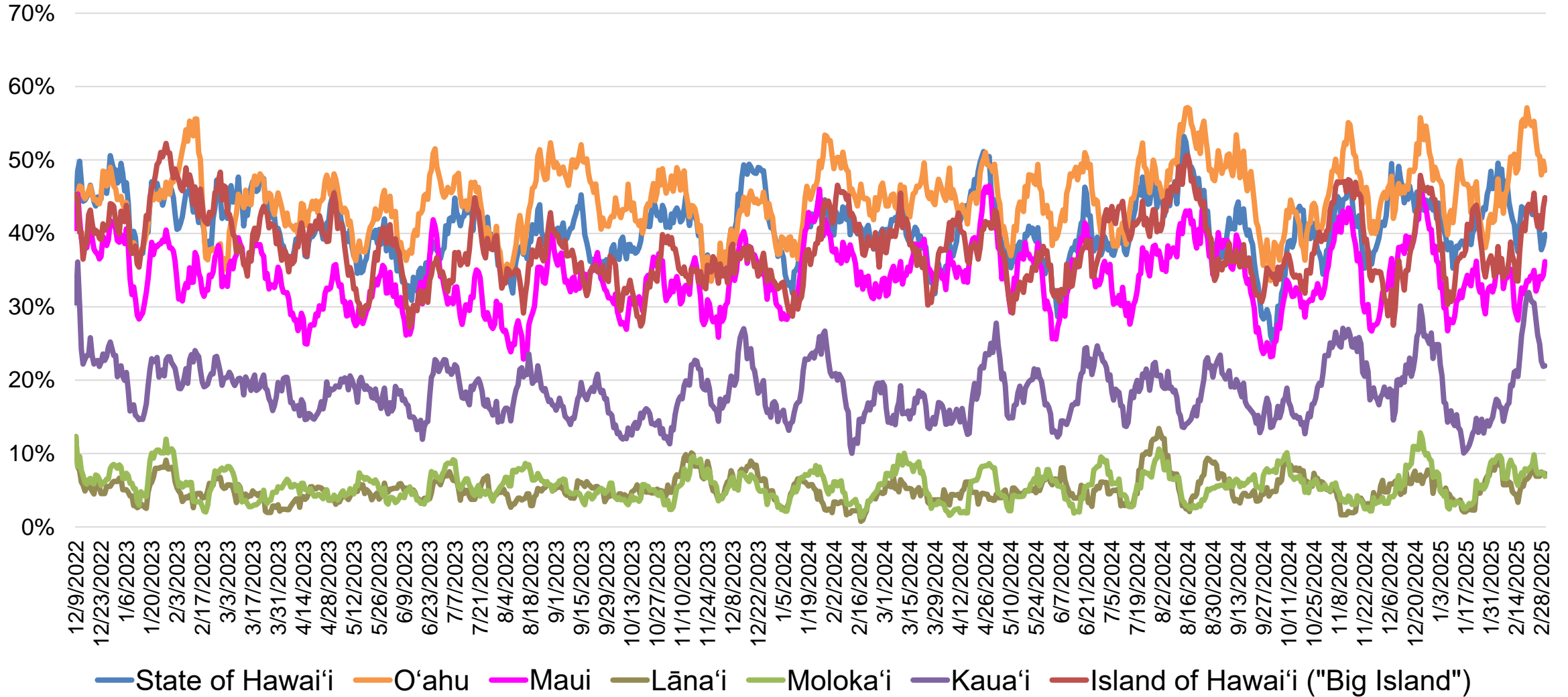


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# Japan Destination Brand Health Trends

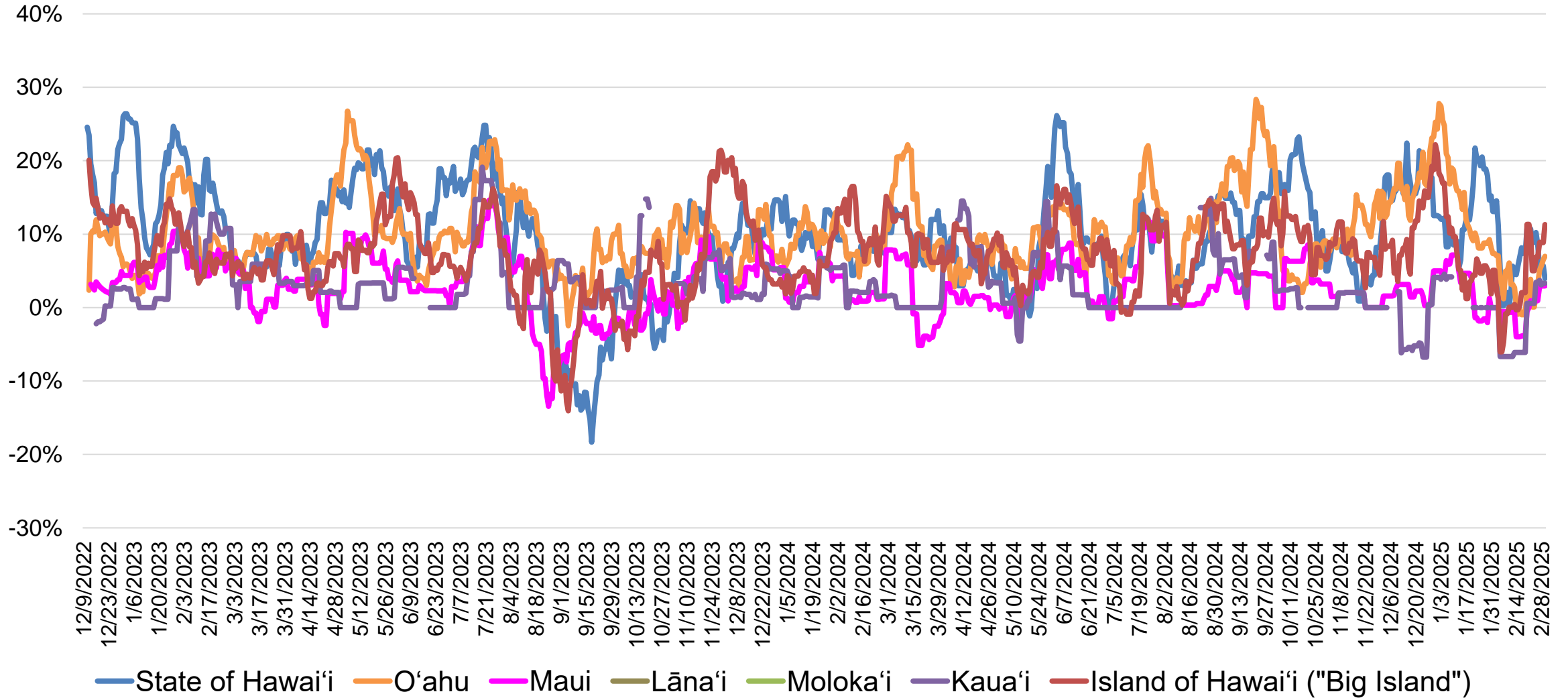


# Japan Destination Awareness Two-Week Moving Average



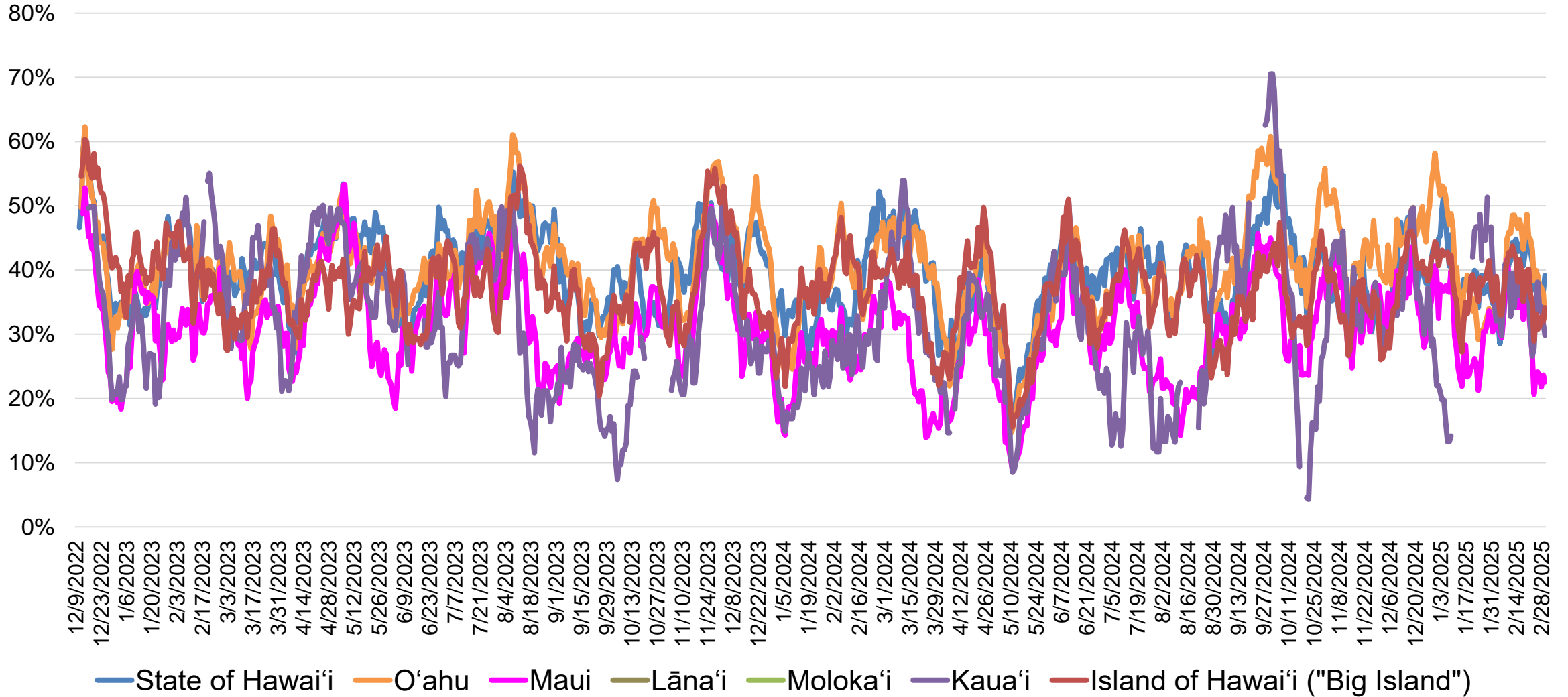
Source: Vision Insights Data as of March 4, 2025

# Japan Chatter (Net) Two-Week Moving Average



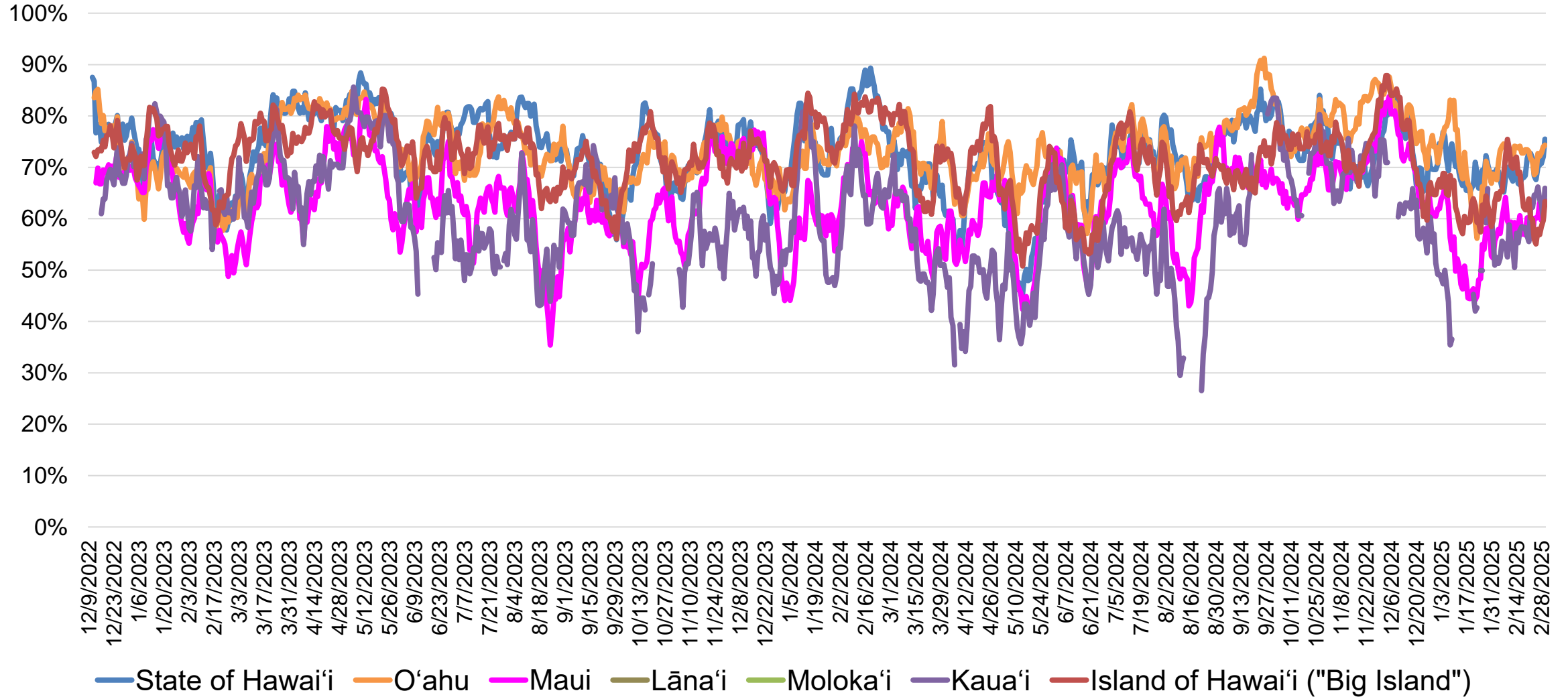
Source: Vision Insights Data as of March 4, 2025  
Samples for Kaua'i, Moloka'i and Lāna'i are small

# Japan Consideration Two-Week Moving Average



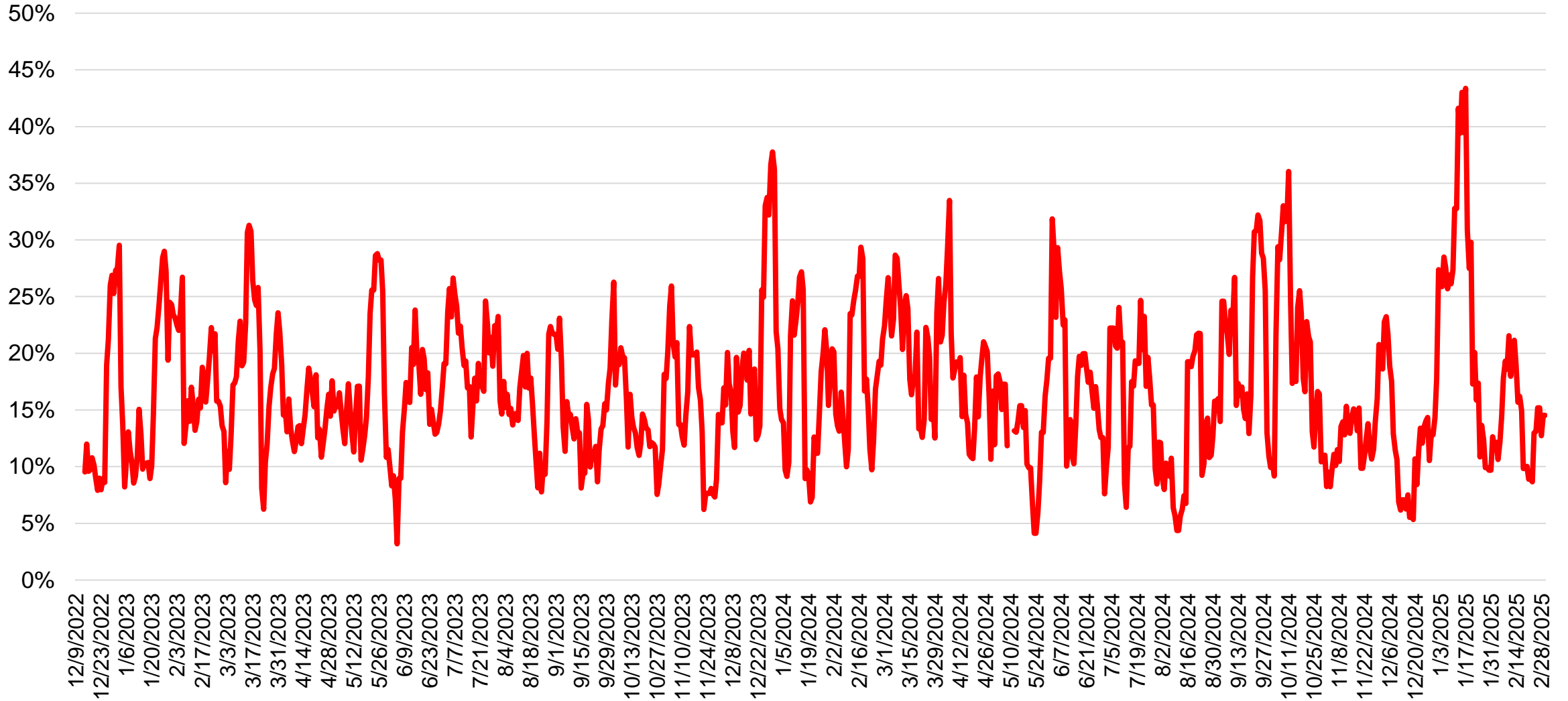
Source: Vision Insights Data as of March 4, 2025  
Samples for Kaua'i, Moloka'i and Lāna'i are small

# Japan Favorability Two-Week Moving Average



Source: Vision Insights Data as of March 4, 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 March 4, 2025



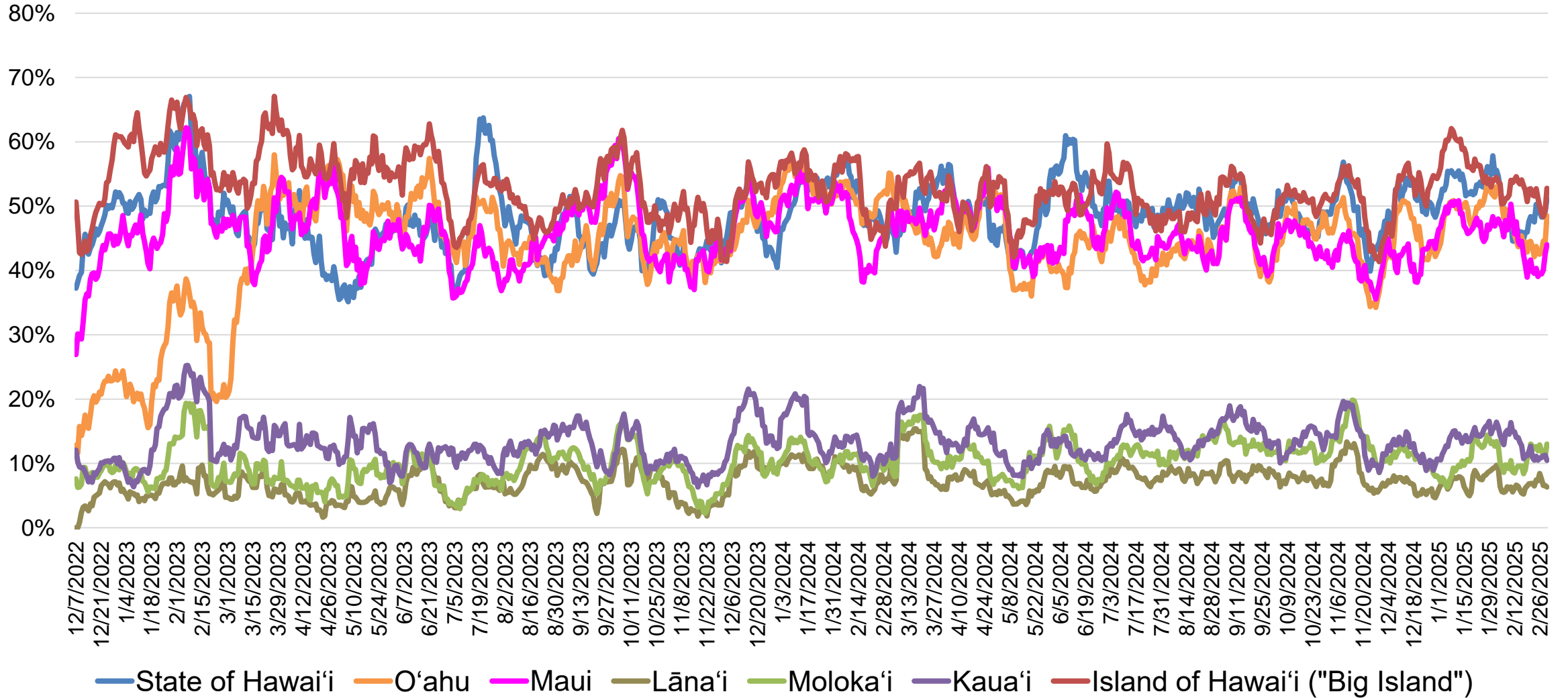
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# Australia Destination Brand Health Trends



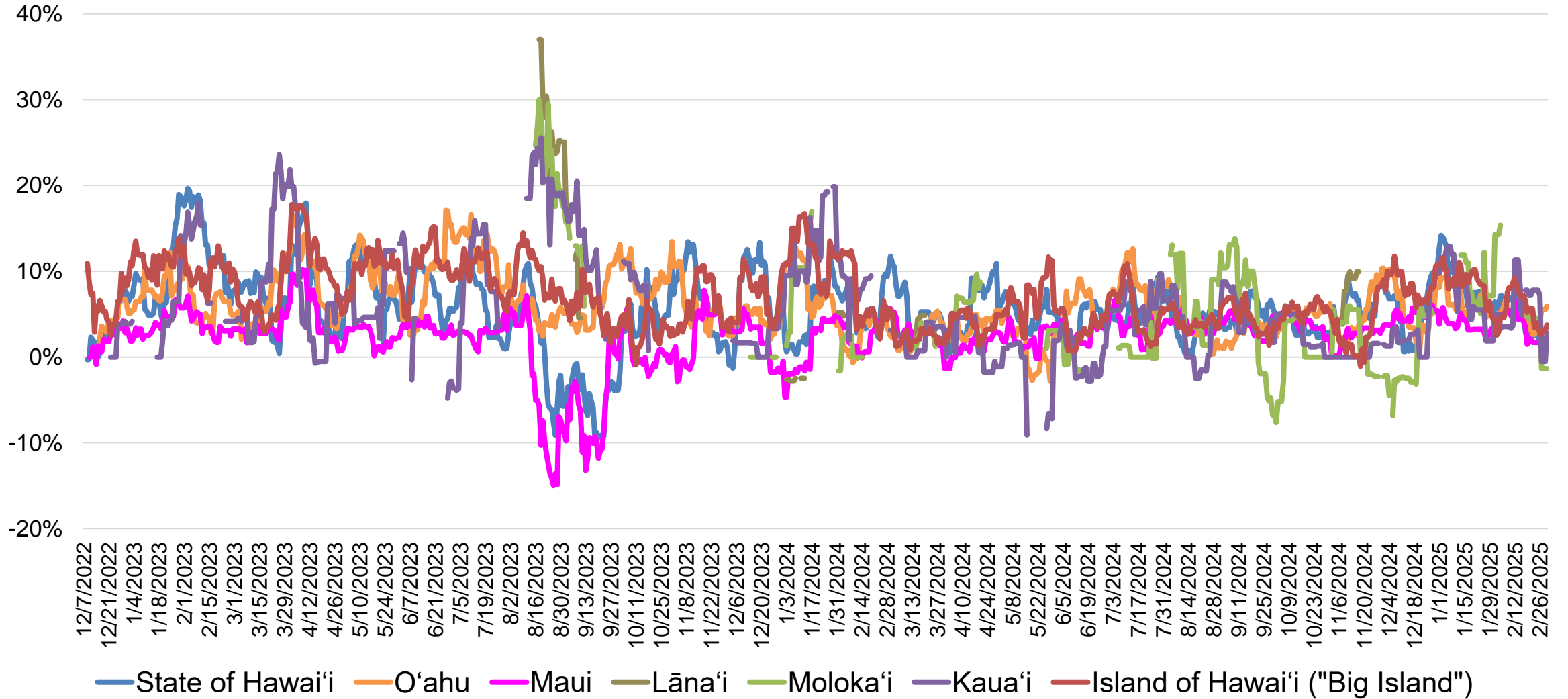


# Australia Destination Awareness Two-Week Moving Average



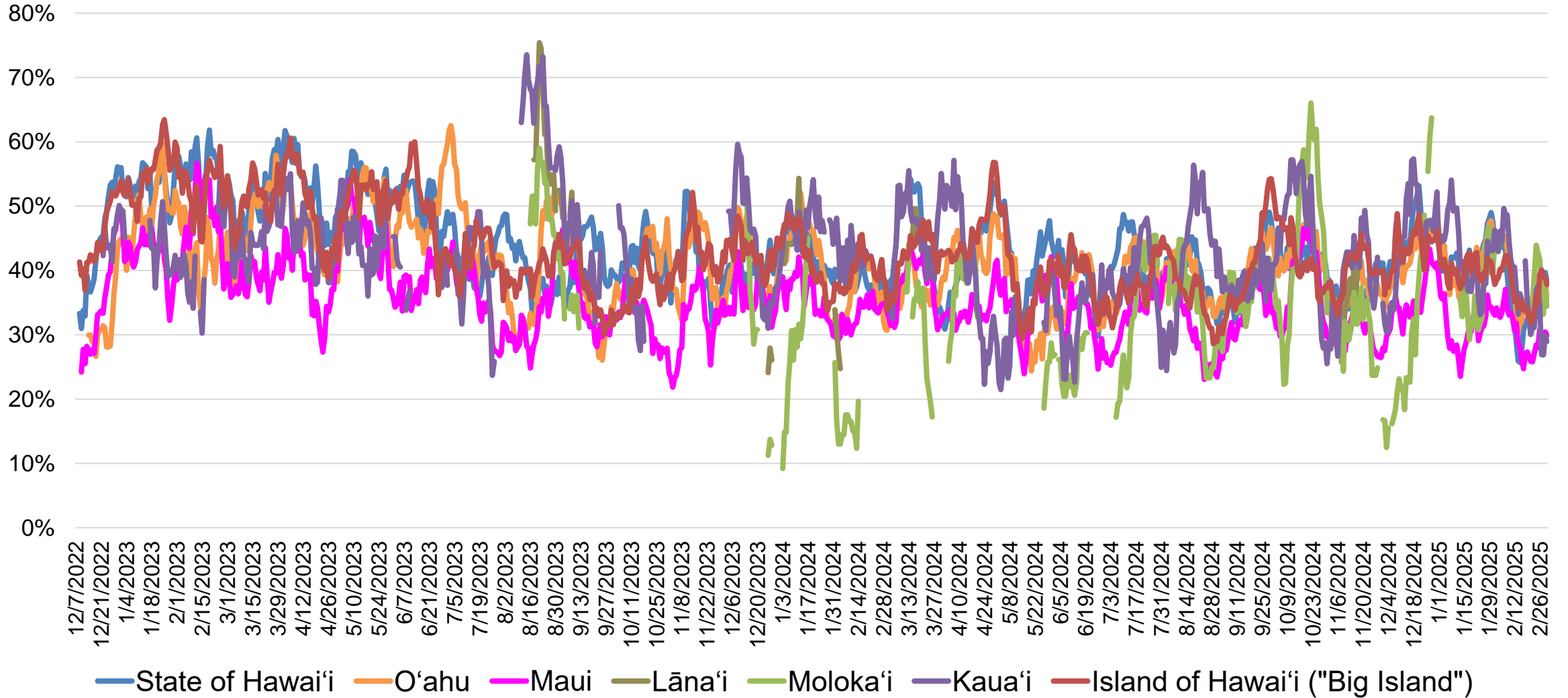
Source: Vision Insights Data as of March 4, 2025

# Australia Chatter (Net) Two-Week Moving Average



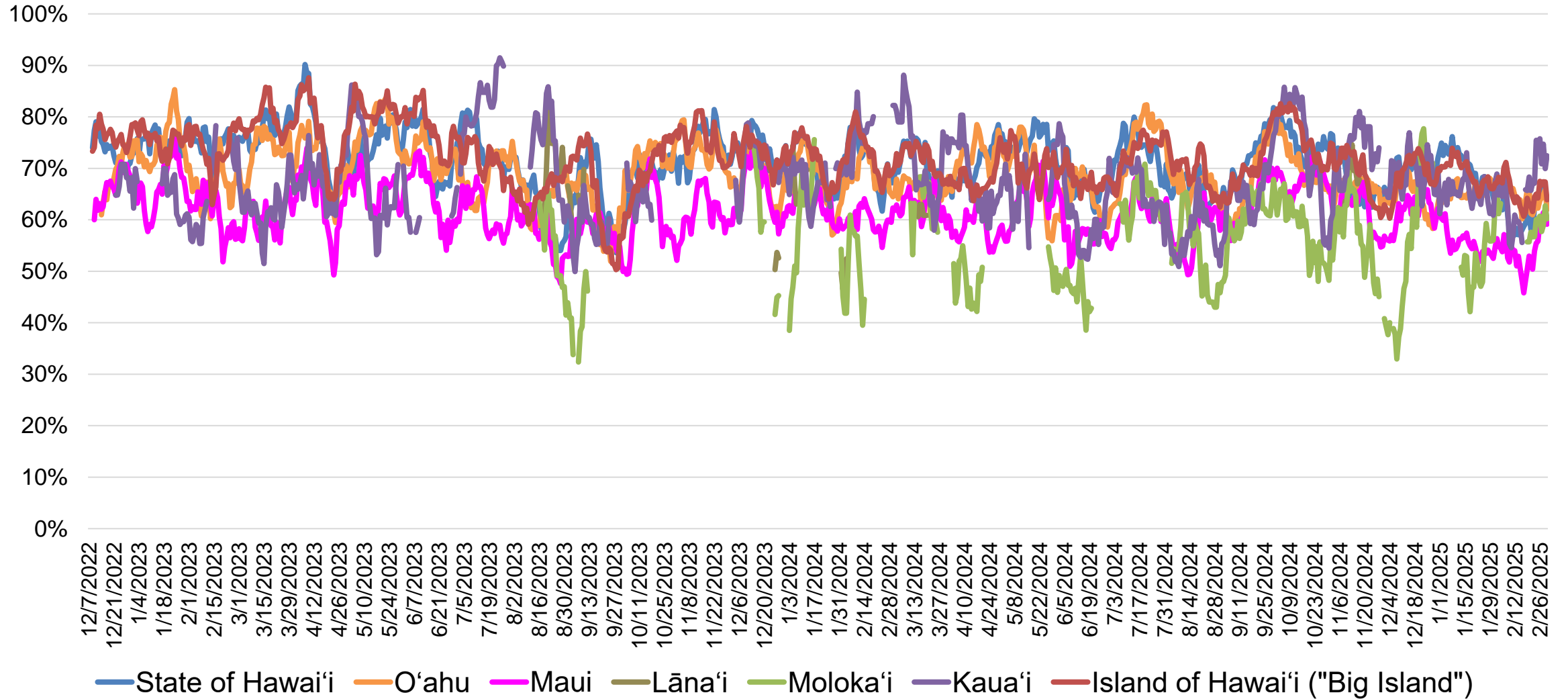
Source: Vision Insights Data as of March 4, 2025  
Samples for Kaua'i, Moloka'i, and Lāna'i are limited

# Australia Consideration Two-Week Moving Average



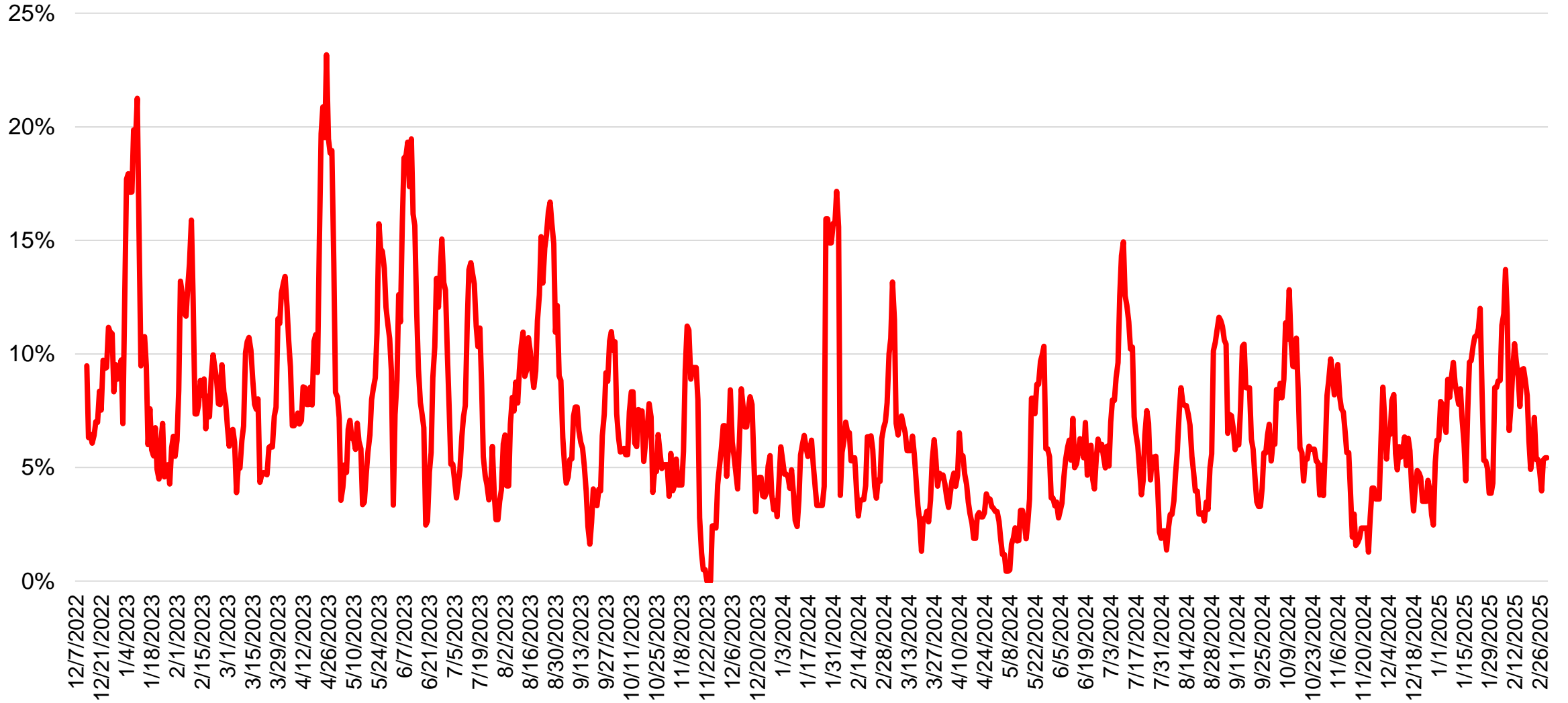
Source: Vision Insights Data as of March 4, 2025  
Samples for Kaua'i, Moloka'i, and Lāna'i are limited

# Australia Favorability Two-Week Moving Average



Source: Vision Insights Data as of March 4, 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 March 4, 2025

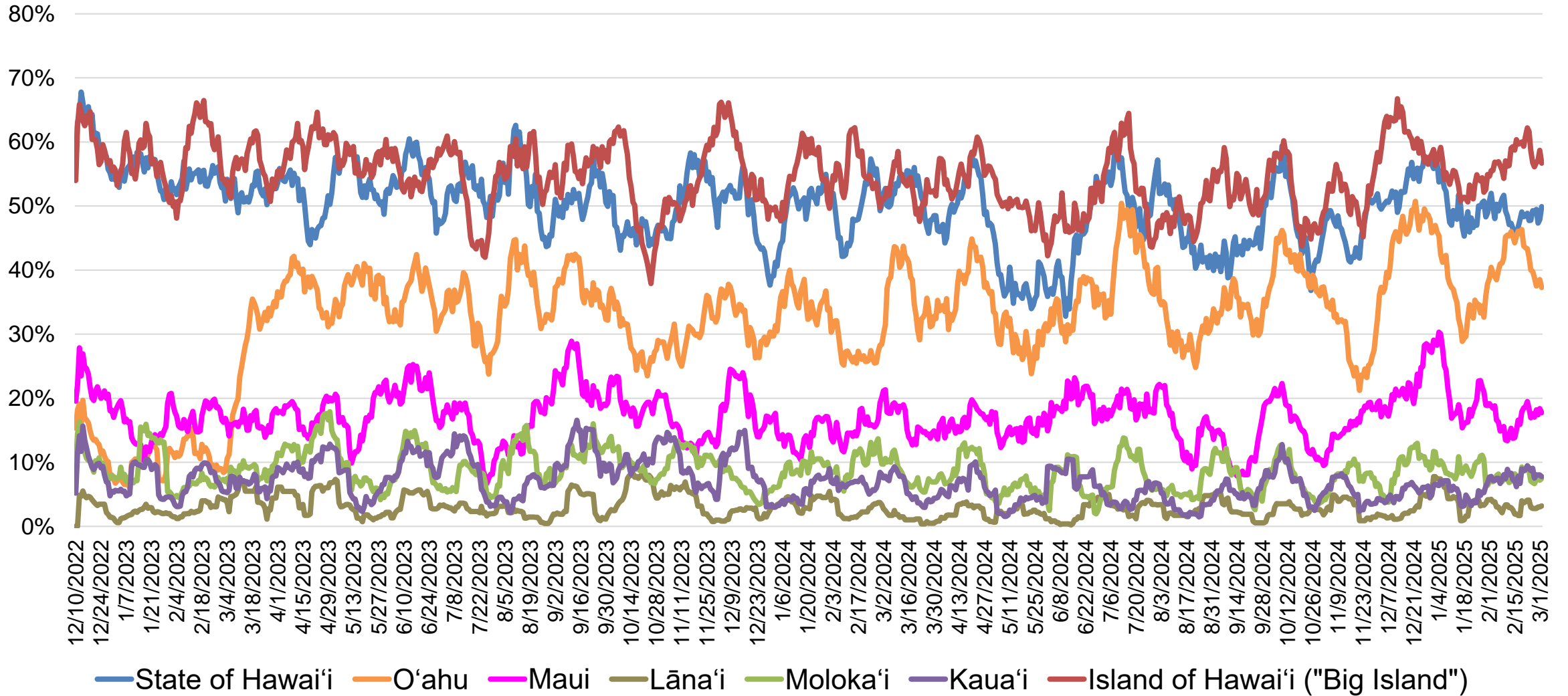


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# **Korea Destination Brand Health Trends**

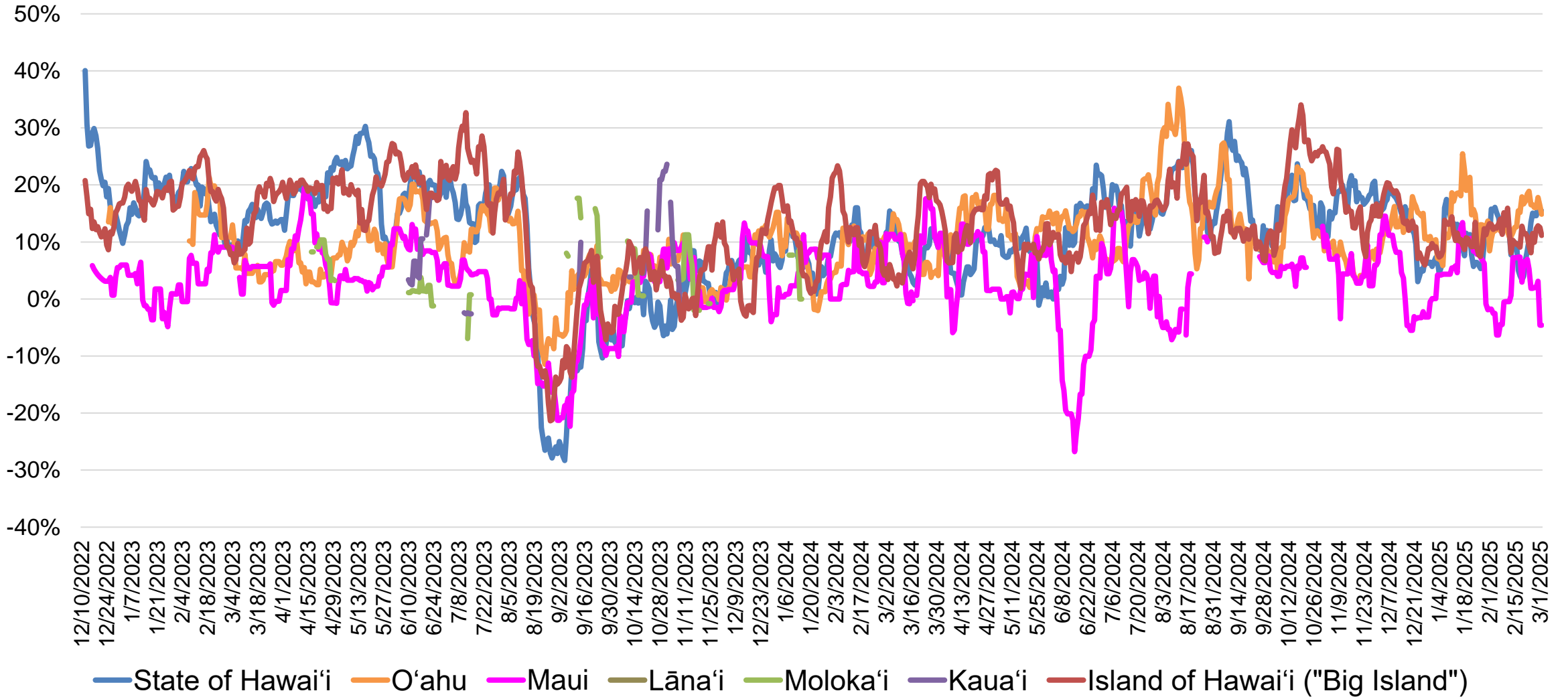


# Korea Destination Awareness Two-Week Moving Average



Source: Vision Insights Data as of March 4, 2025

# Korea Chatter (Net) Two-Week Moving Average

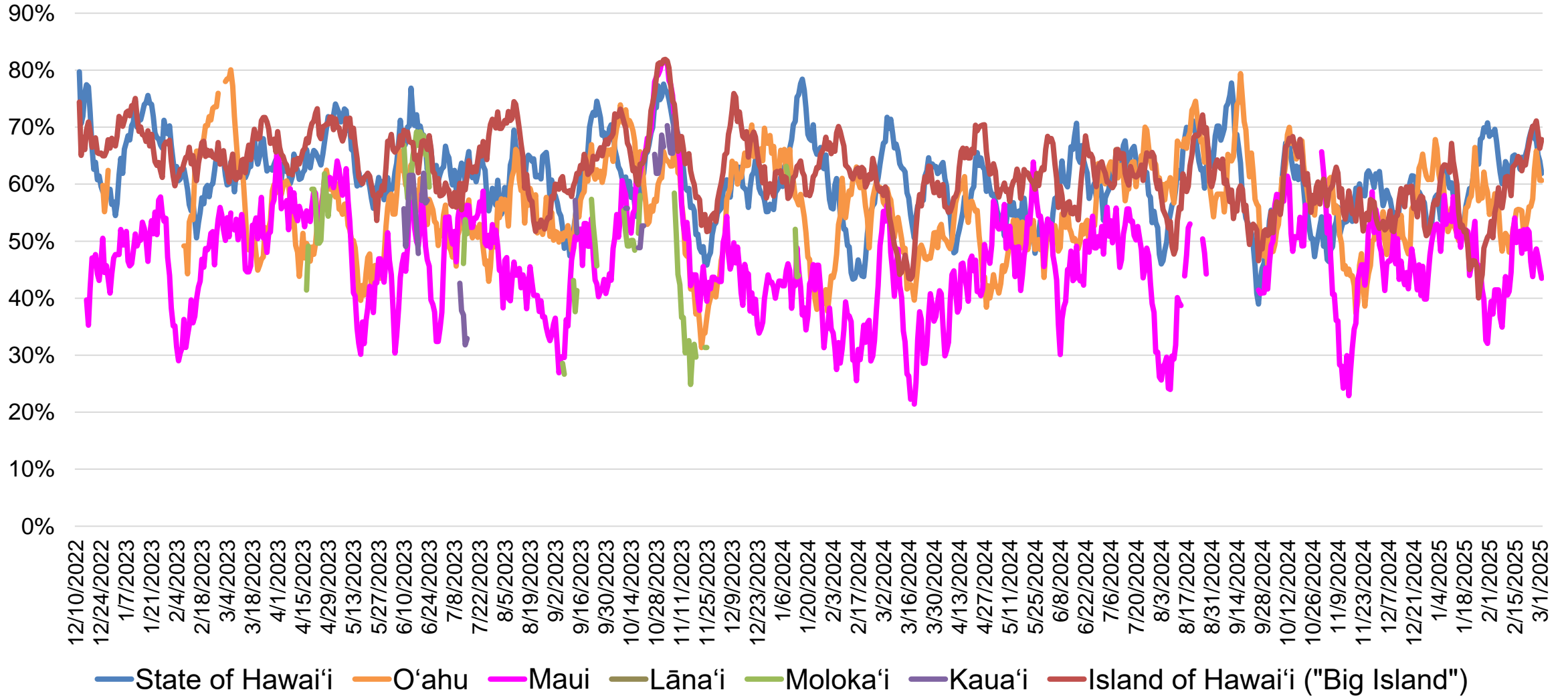


Source: Vision Insights Data as of March 4, 2025

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



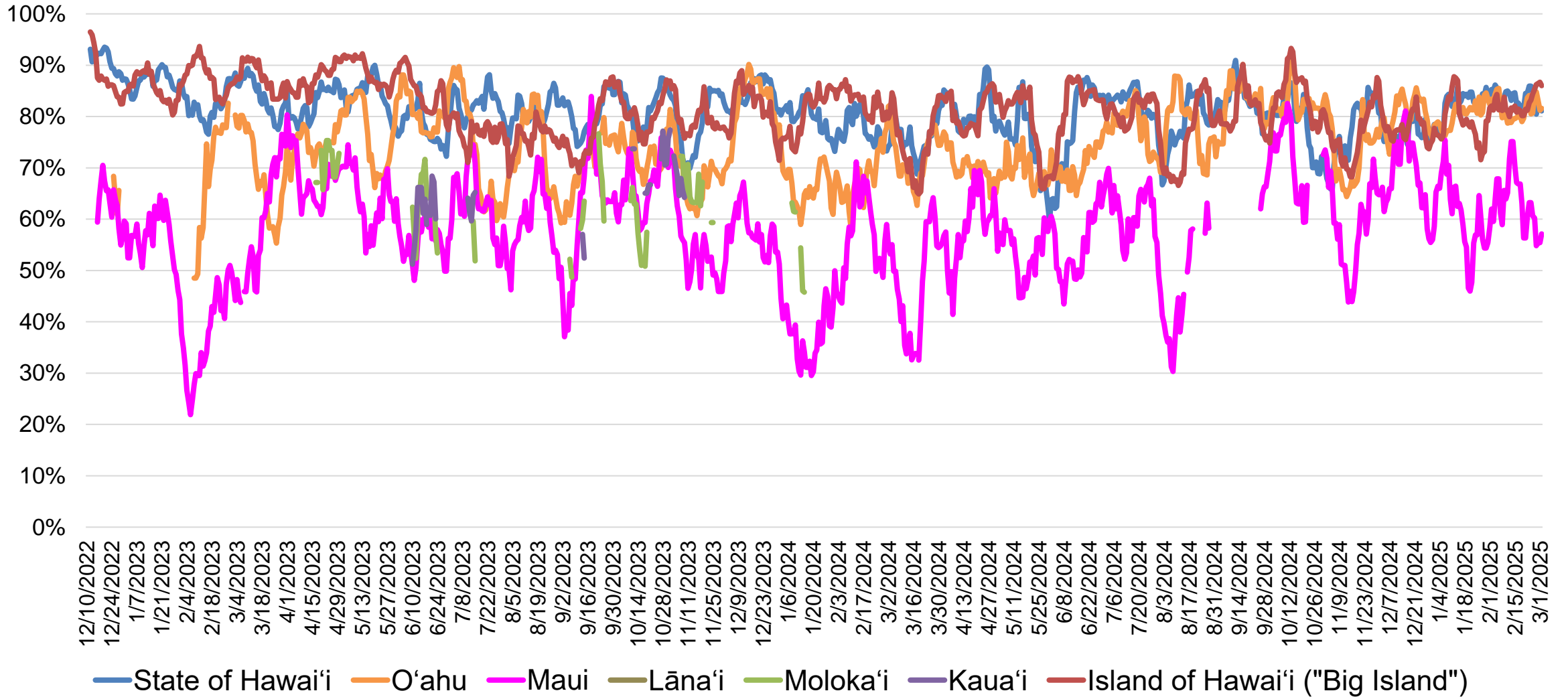
# Korea Consideration Two-Week Moving Average



Source: Vision Insights Data as of March 4, 2025

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

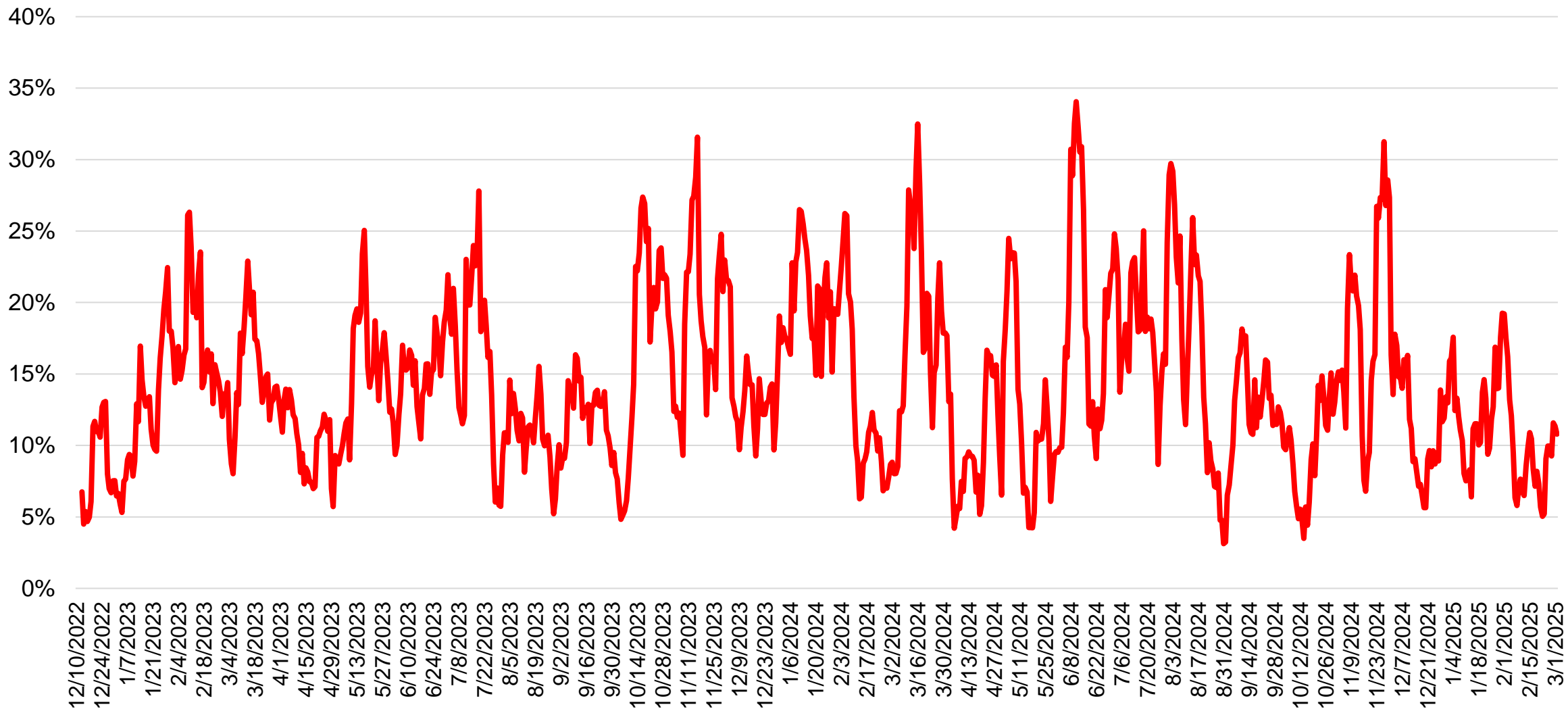
# Korea Favorability Two-Week Moving Average



Source: Vision Insights Data as of March 4, 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 March 4, 2025