



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

Vision Insights

Destination Brand Health Trends

March 18, 2024



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 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

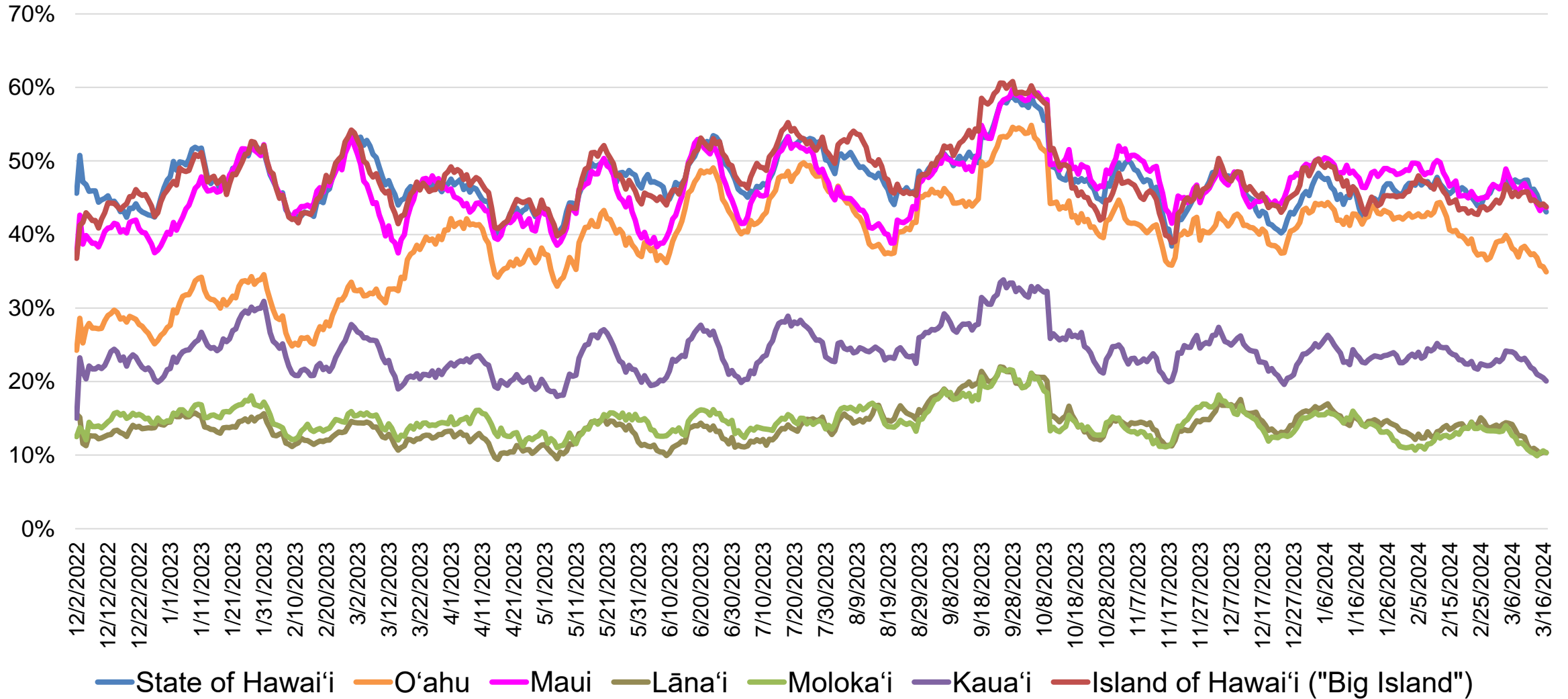


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United States Destination Brand Health Trends

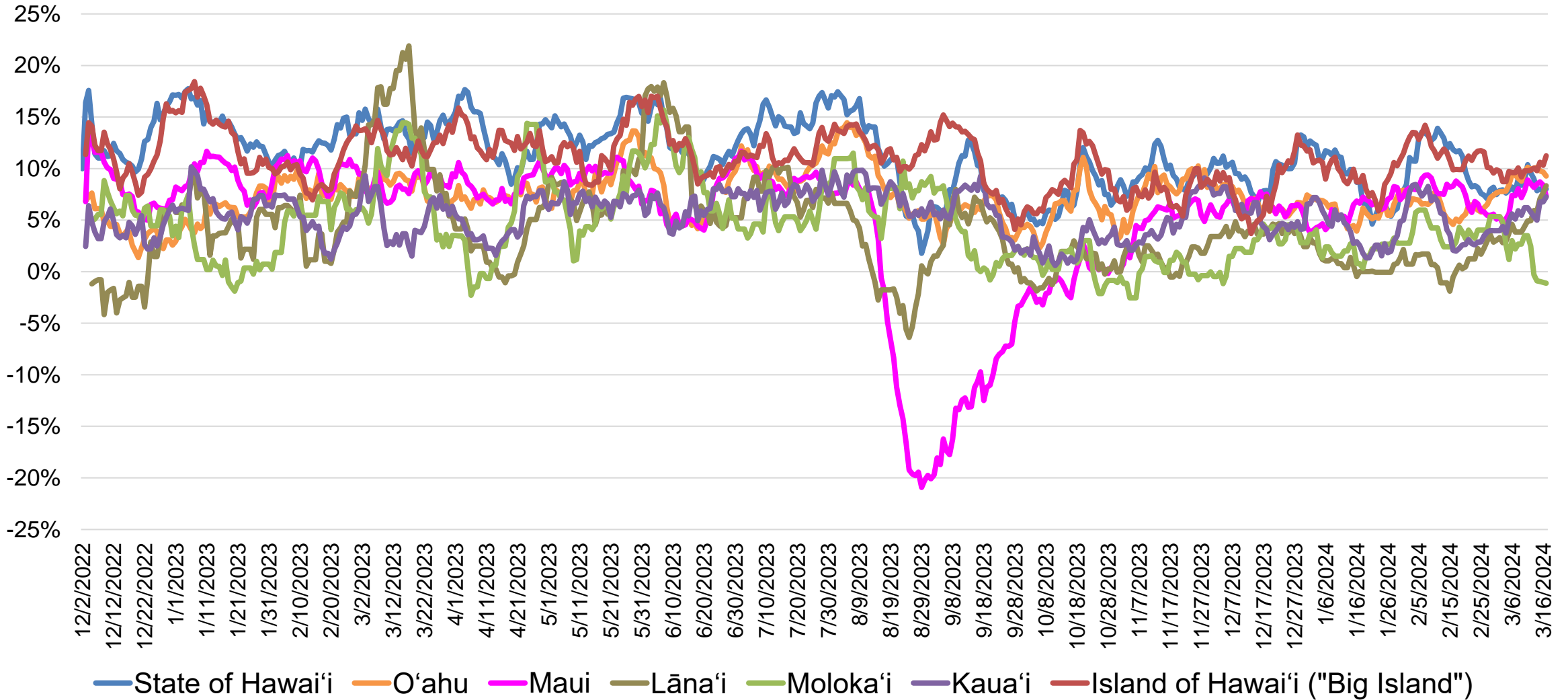


U.S. Destination Awareness Two-Week Moving Average



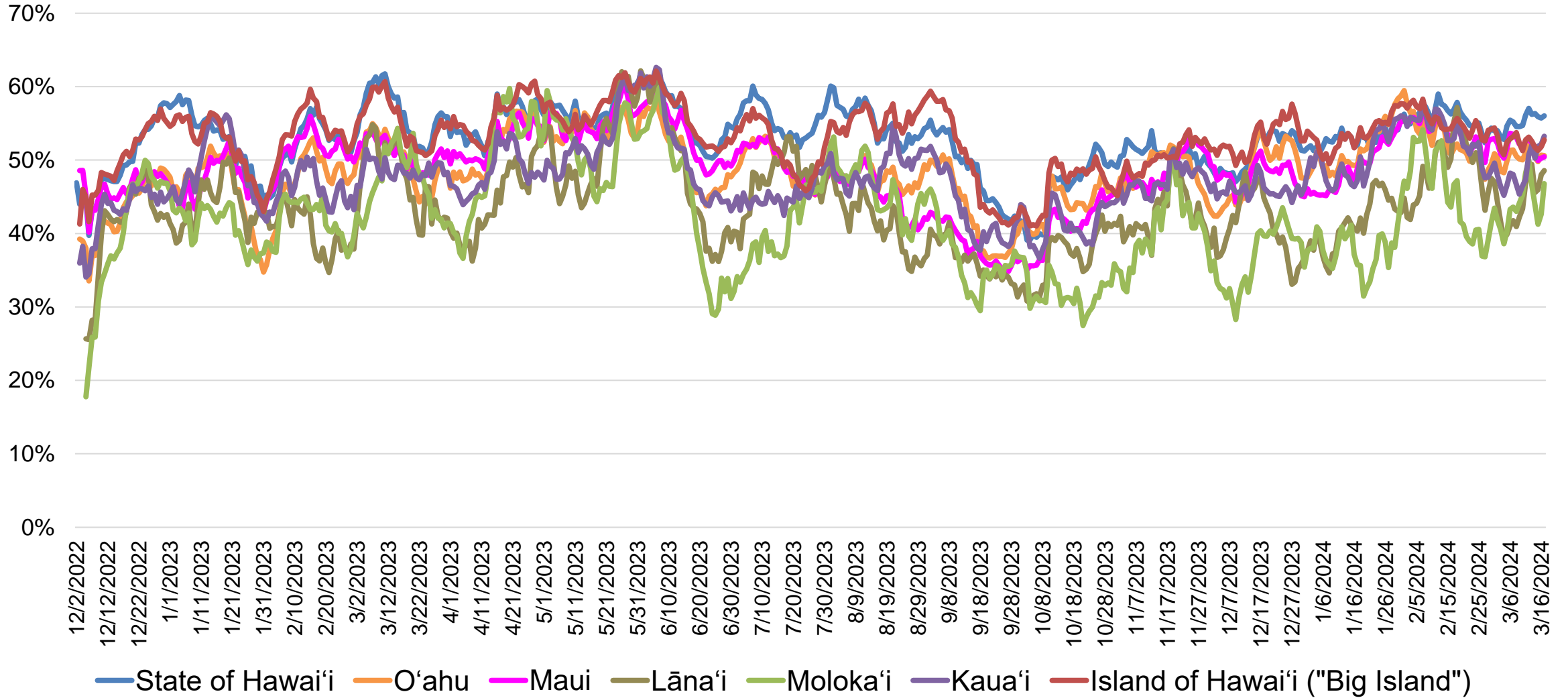
Source: Vision Insights Data as of March 18, 2024

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



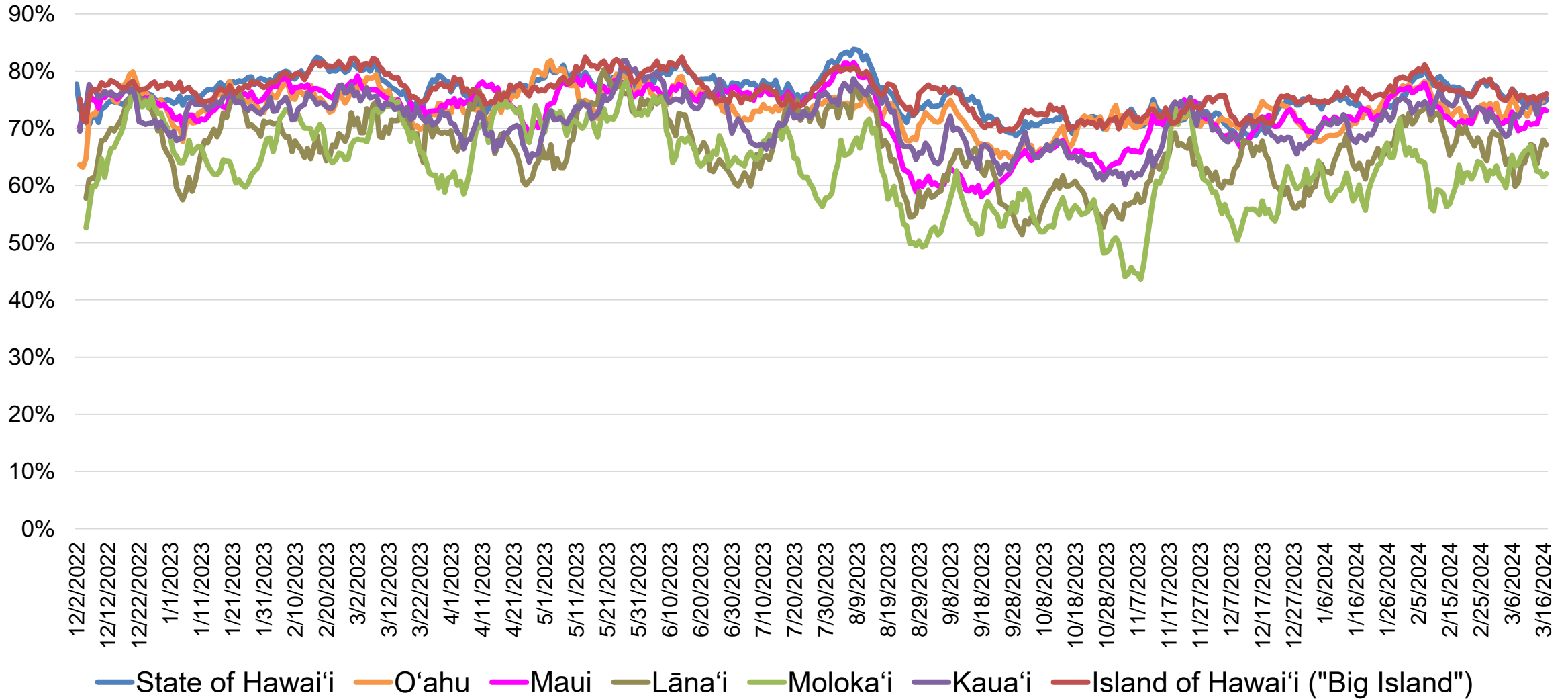
Source: Vision Insights Data as of March 18, 2024

U.S. Consideration Two-Week Moving Average



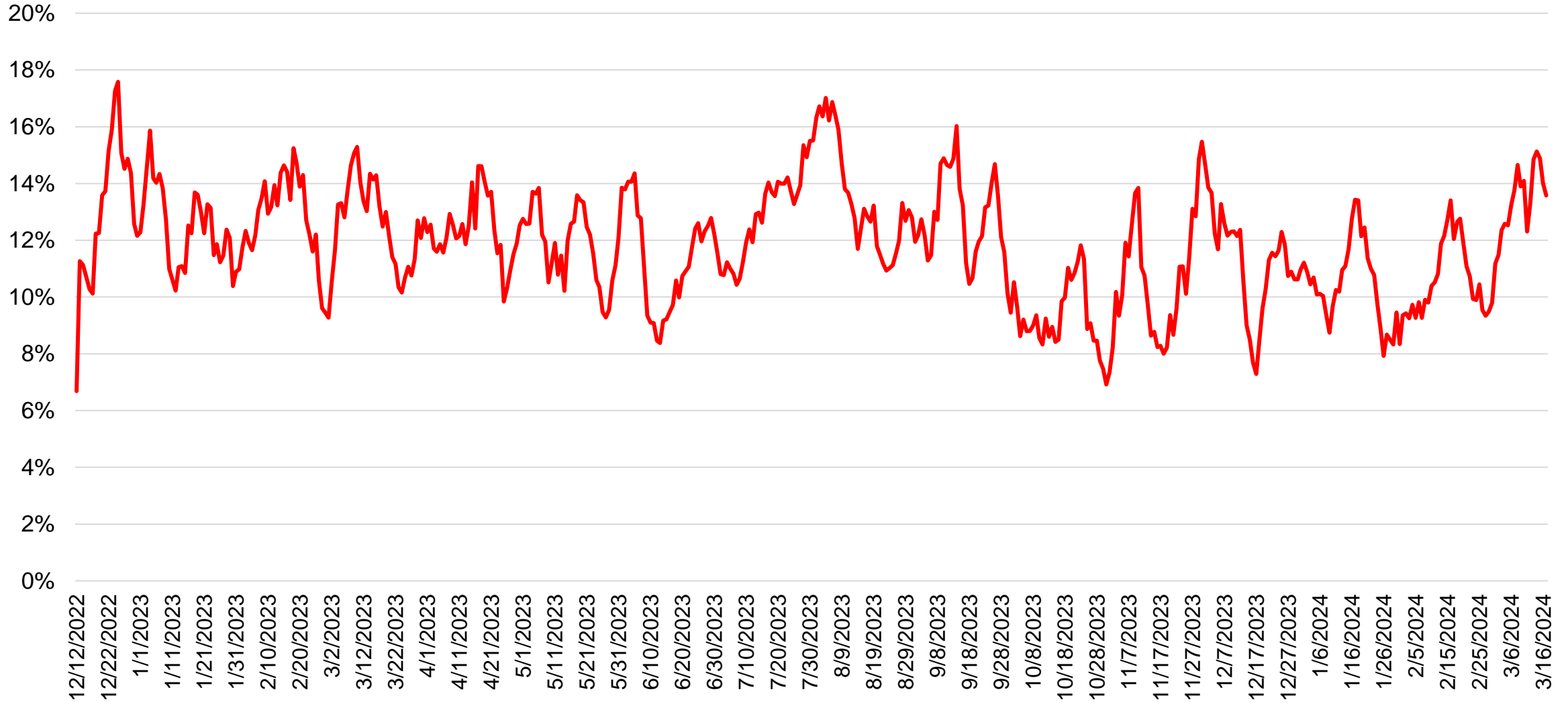
Source: Vision Insights Data as of March 18, 2024

U.S. Favorability Two-Week Moving Average



Source: Vision Insights Data as of March 18, 2024

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



Source: Vision Insights Data as of March 18, 2024

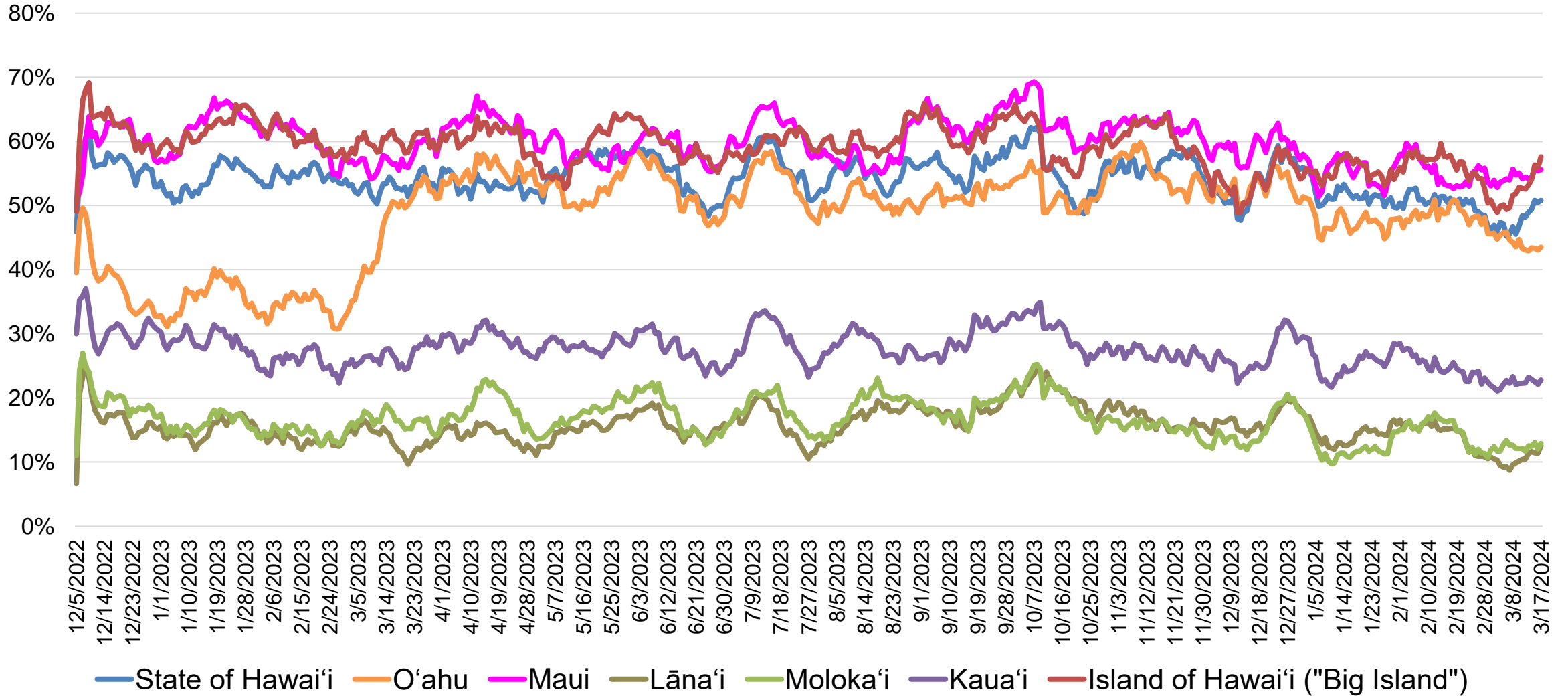


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Canada Destination Brand Health Trends

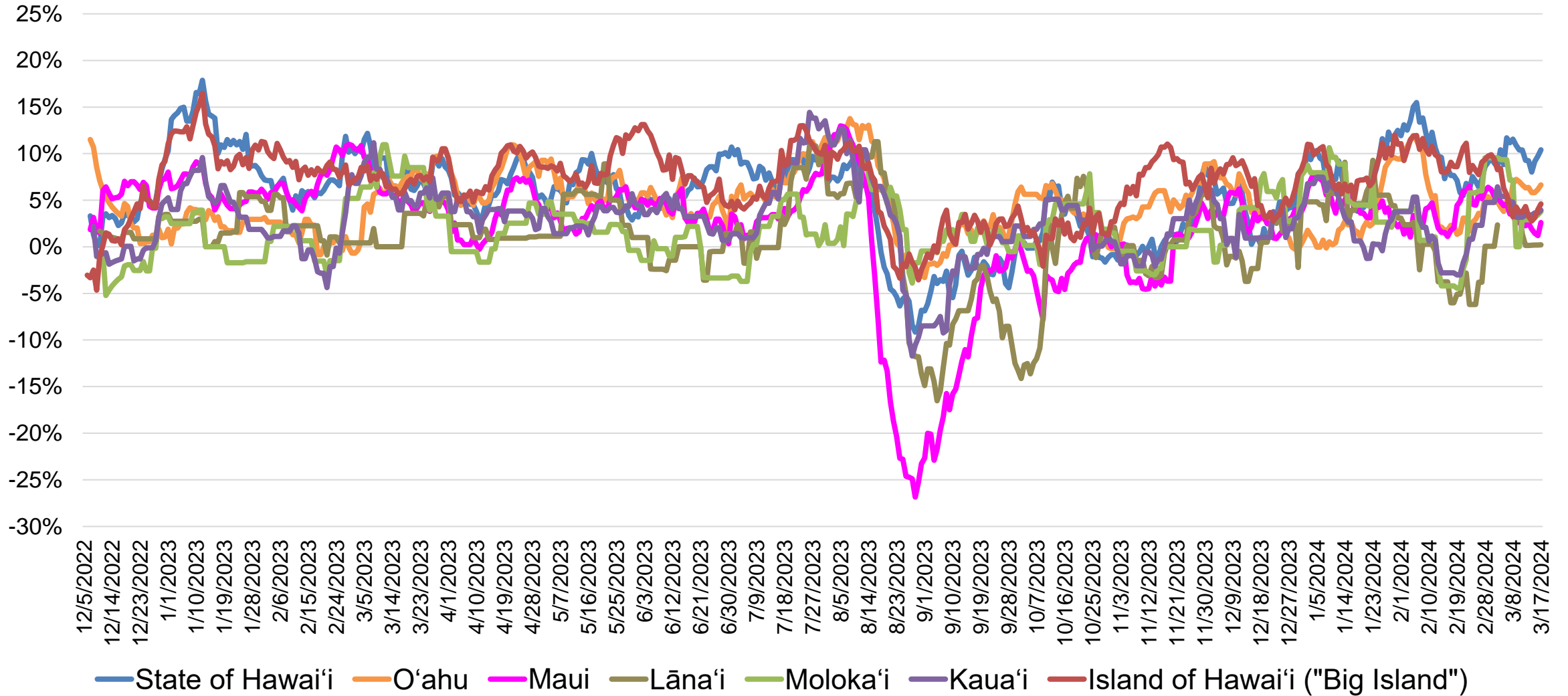


Canada Destination Awareness Two-Week Moving Average



Source: Vision Insights Data as of March 18, 2024

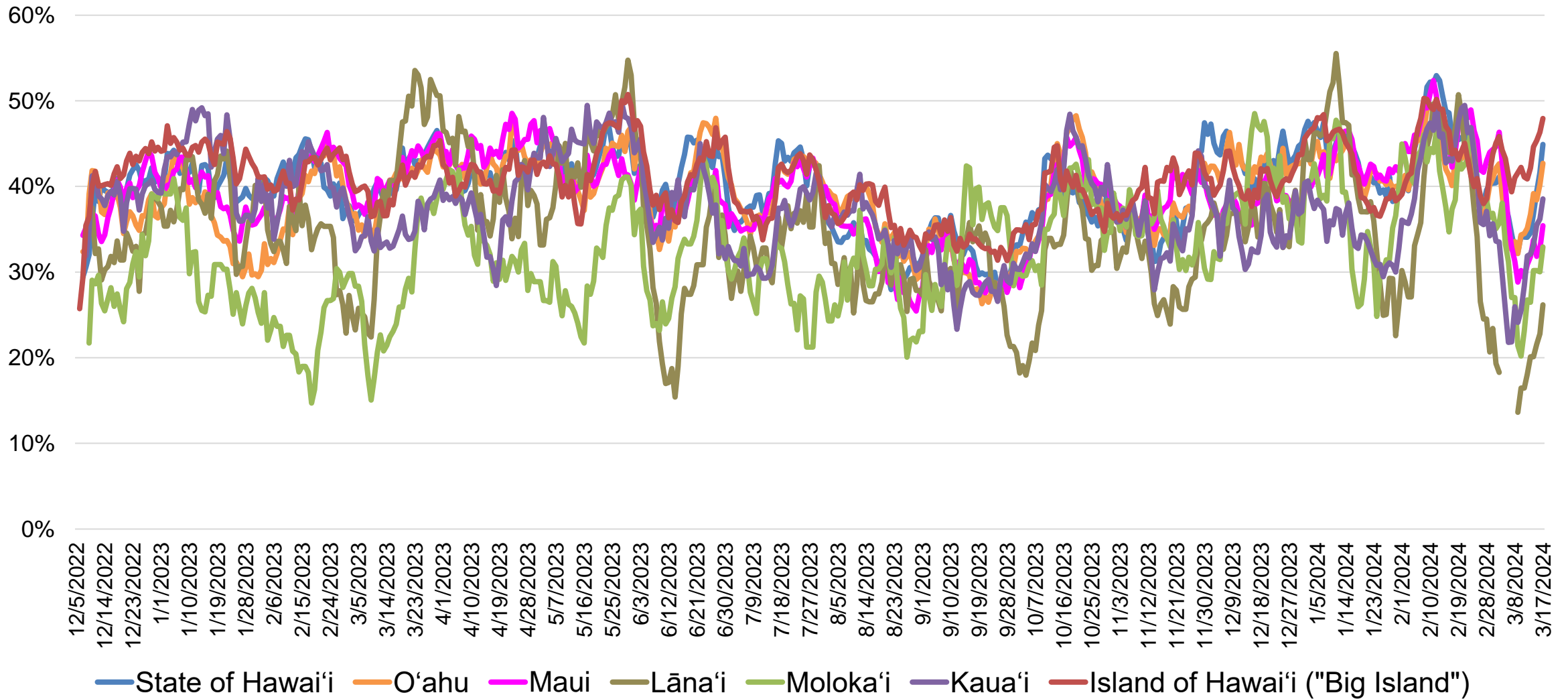
Canada Chatter (Net) Two-Week Moving Average



Source: Vision Insights Data as of March 18, 2024

Samples for Lāna'i are limited

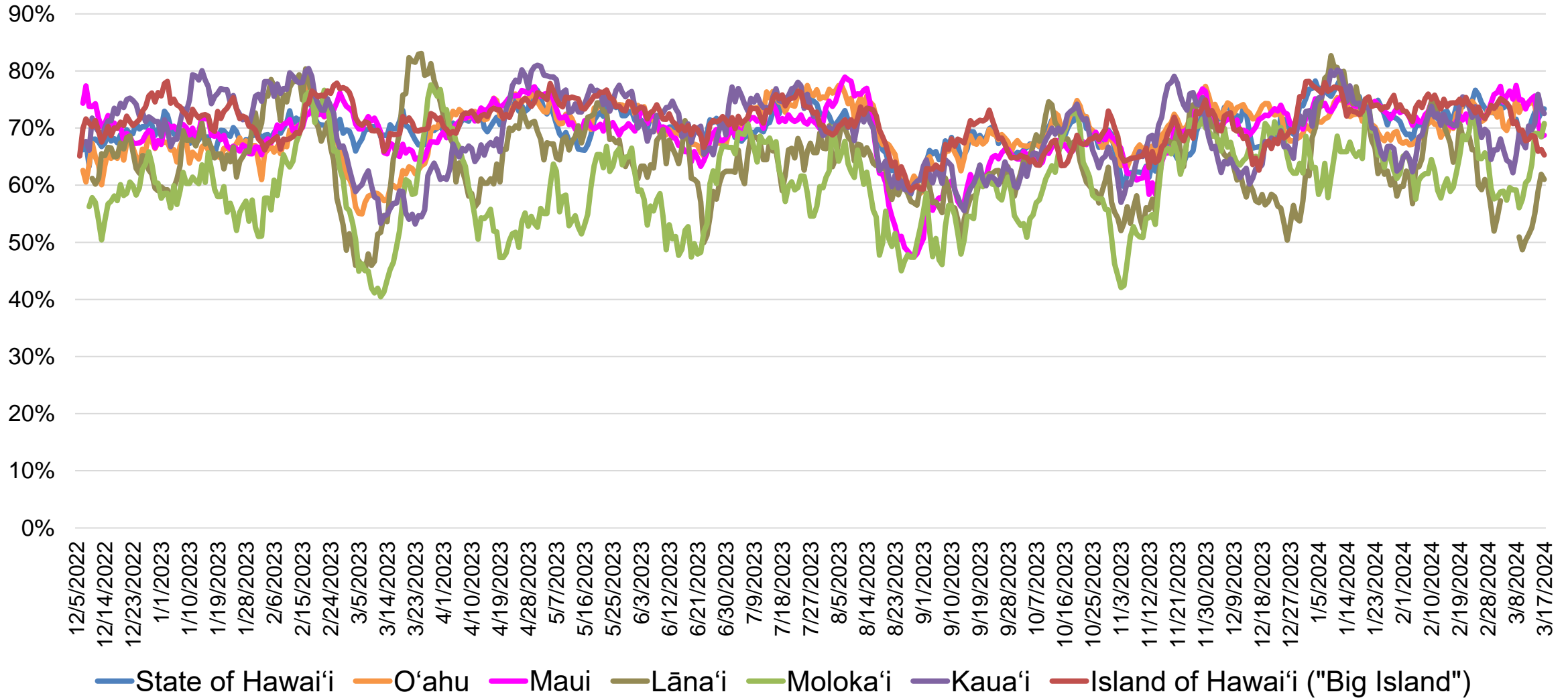
Canada Consideration Two-Week Moving Average



Source: Vision Insights Data as of March 18, 2024

Samples for Lāna'i are limited

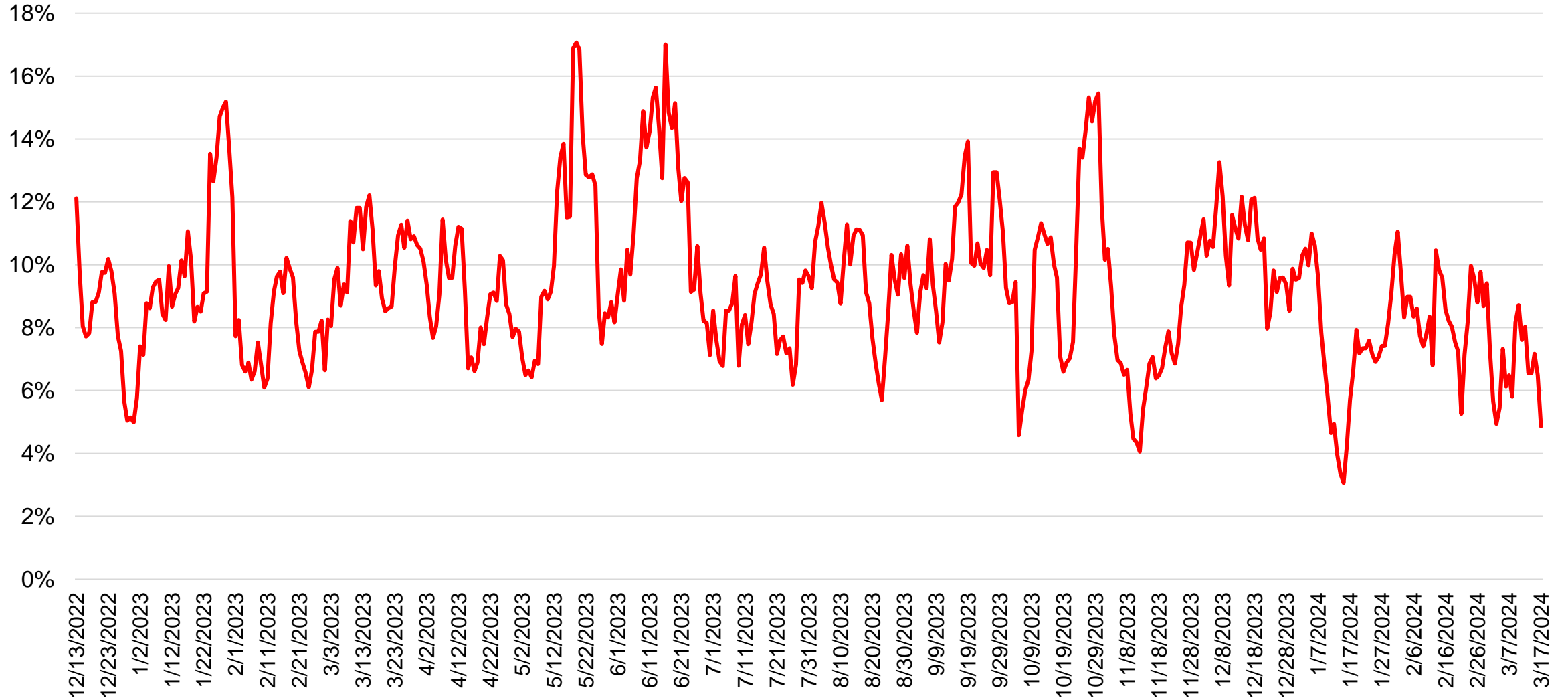
Canada Favorability Two-Week Moving Average



Source: Vision Insights Data as of March 18, 2024

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 18, 2024

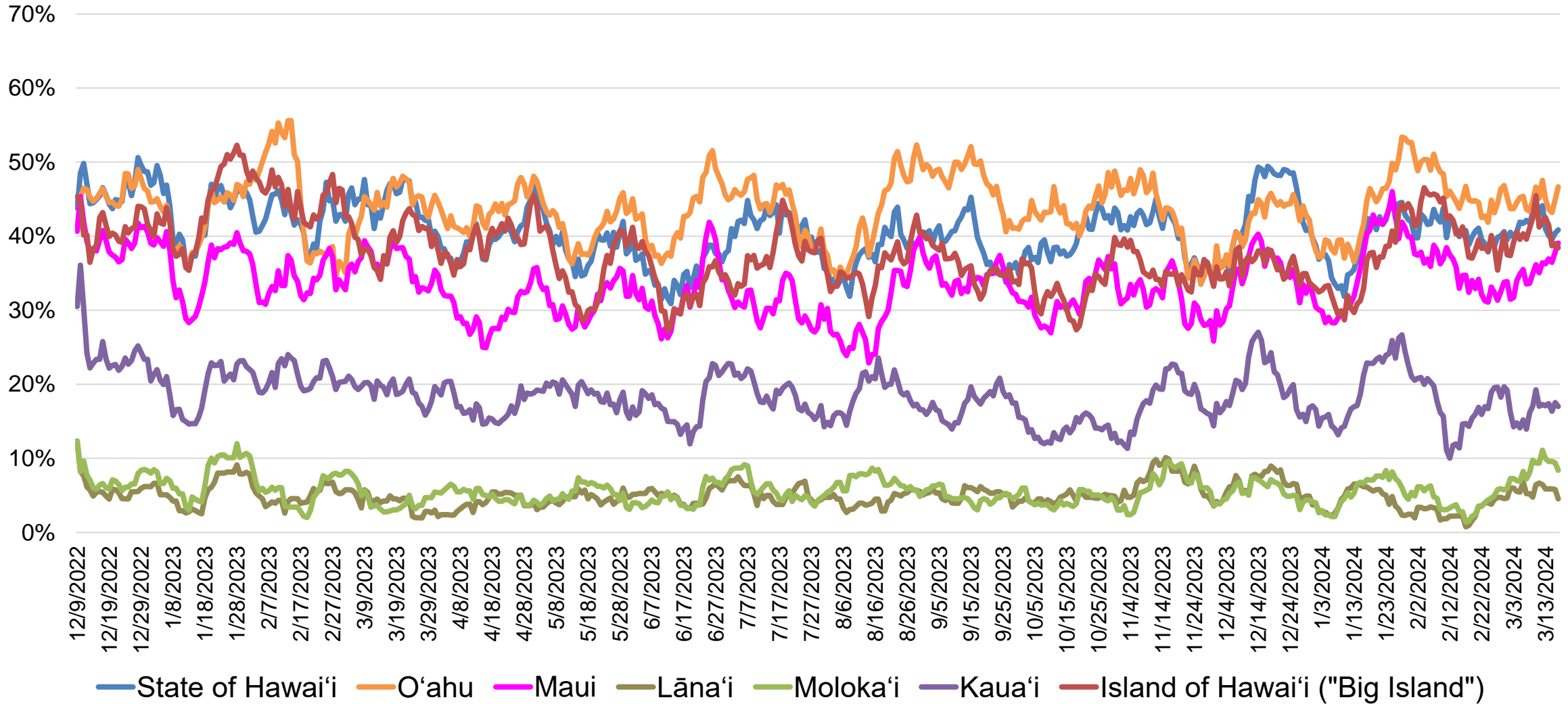


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Japan Destination Brand Health Trends

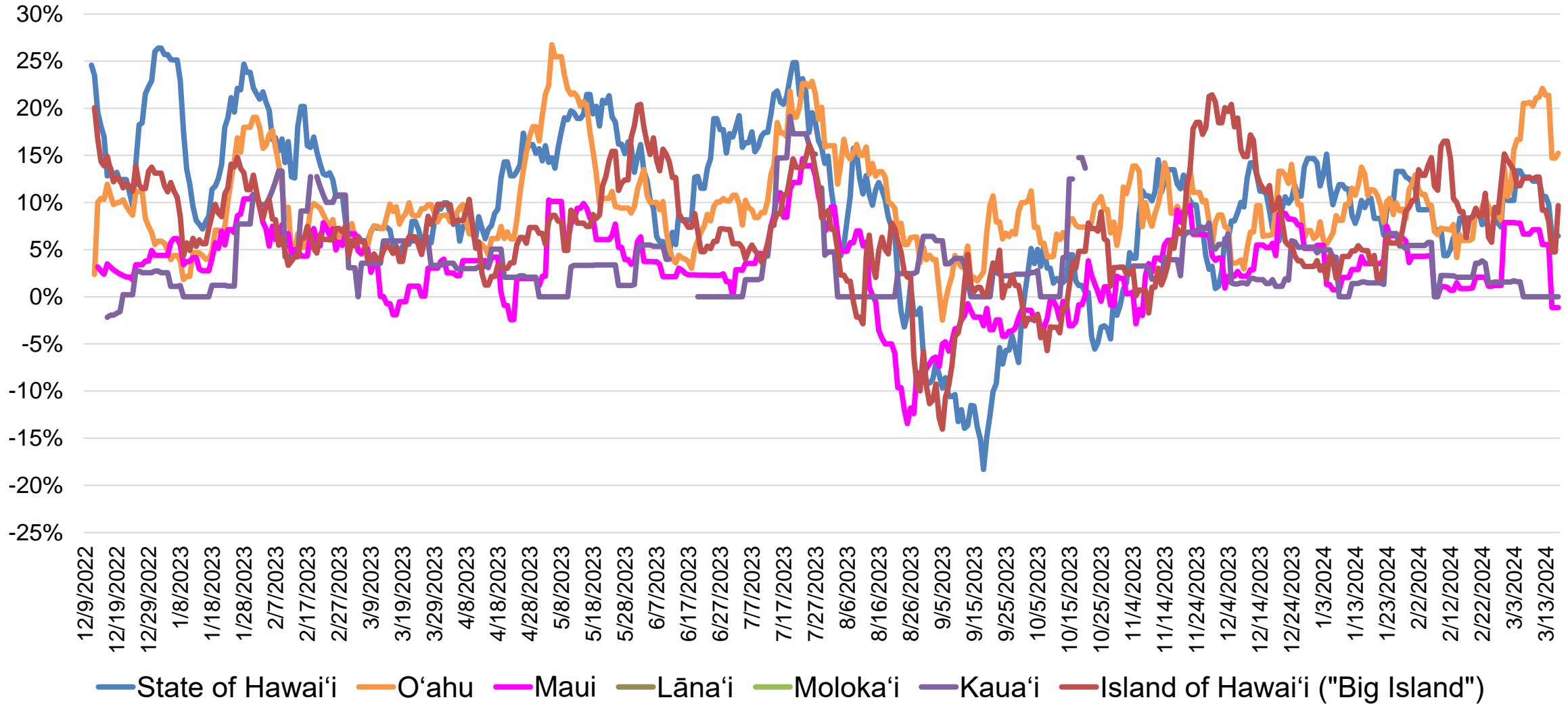


Japan Destination Awareness Two-Week Moving Average



Source: Vision Insights Data as of March 18, 2024

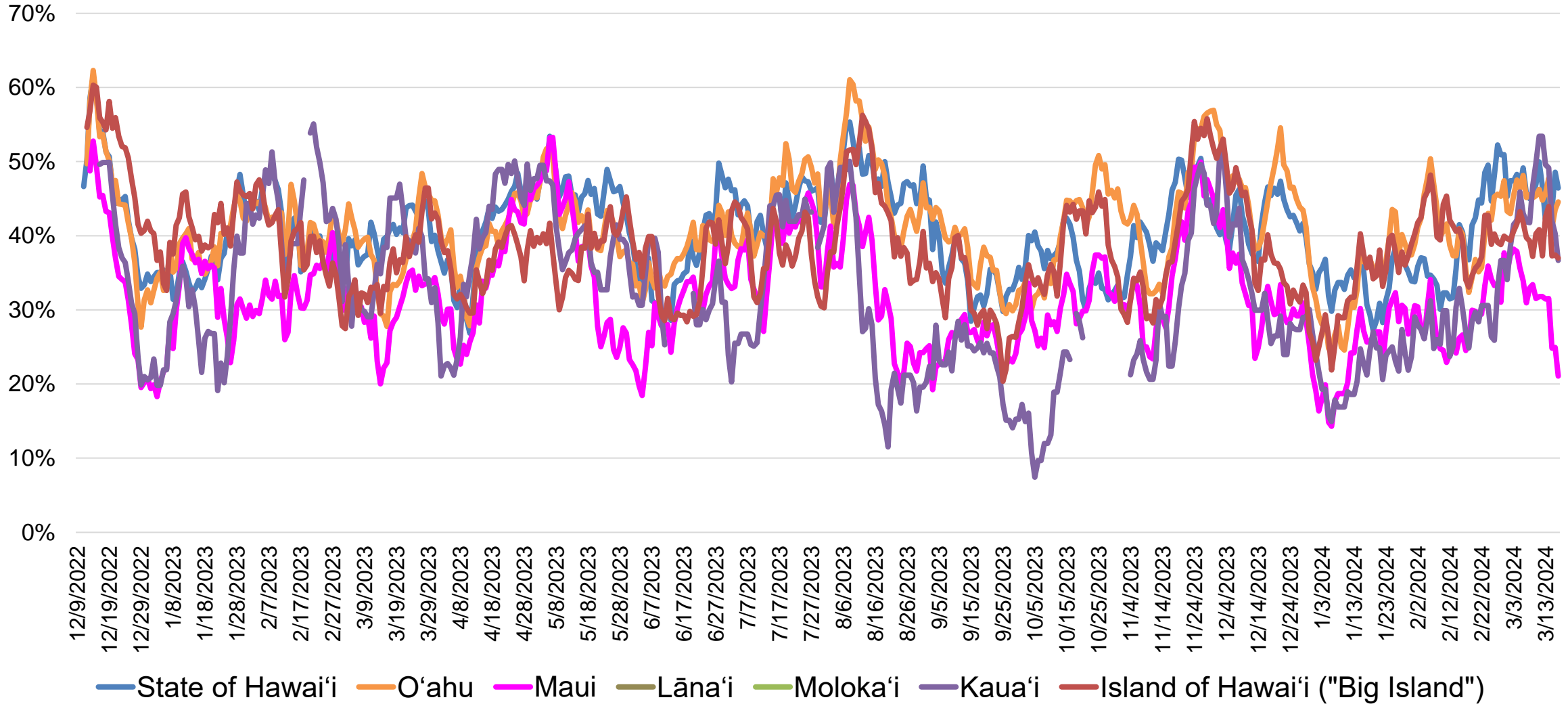
Japan Chatter (Net) Two-Week Moving Average



Source: Vision Insights Data as of March 18, 2024

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

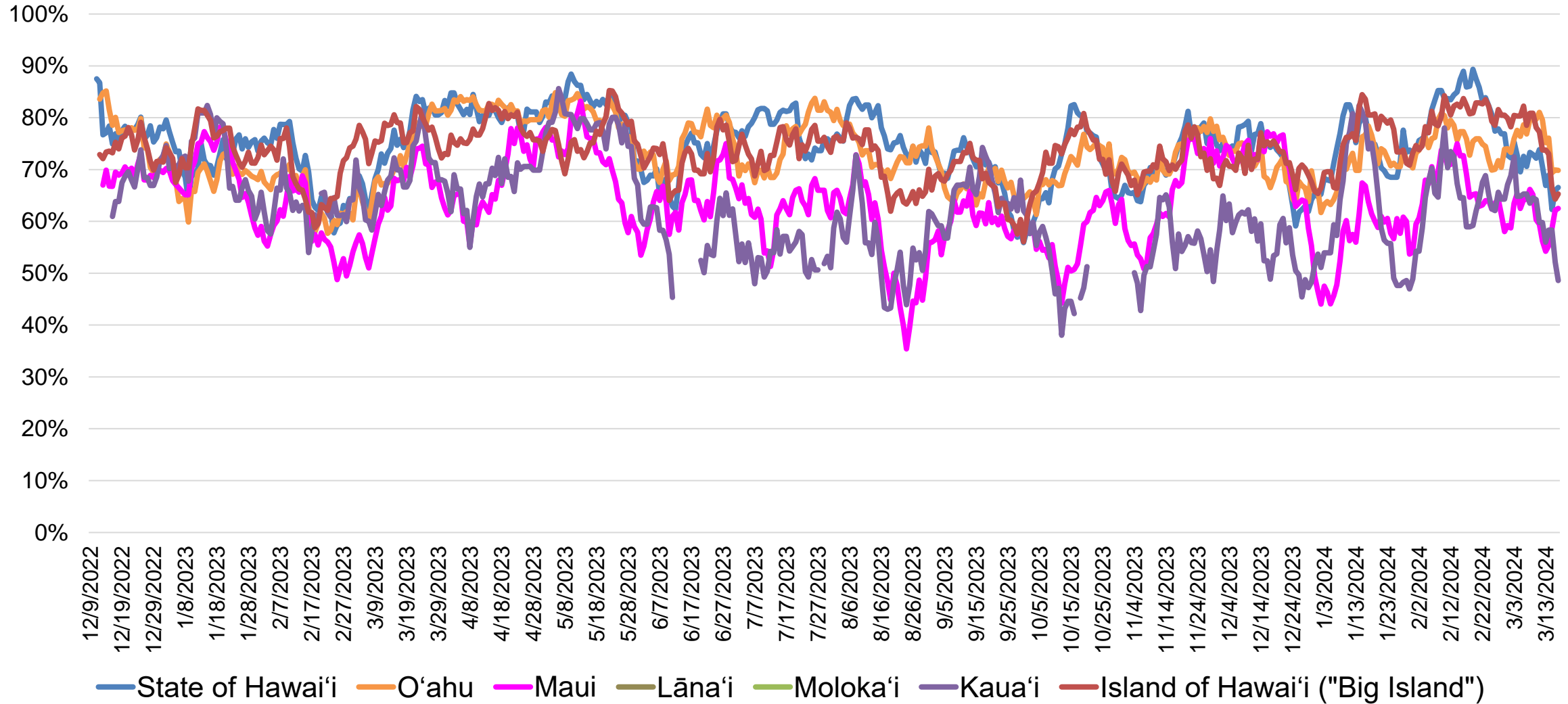
Japan Consideration Two-Week Moving Average



Source: Vision Insights Data as of March 18, 2024

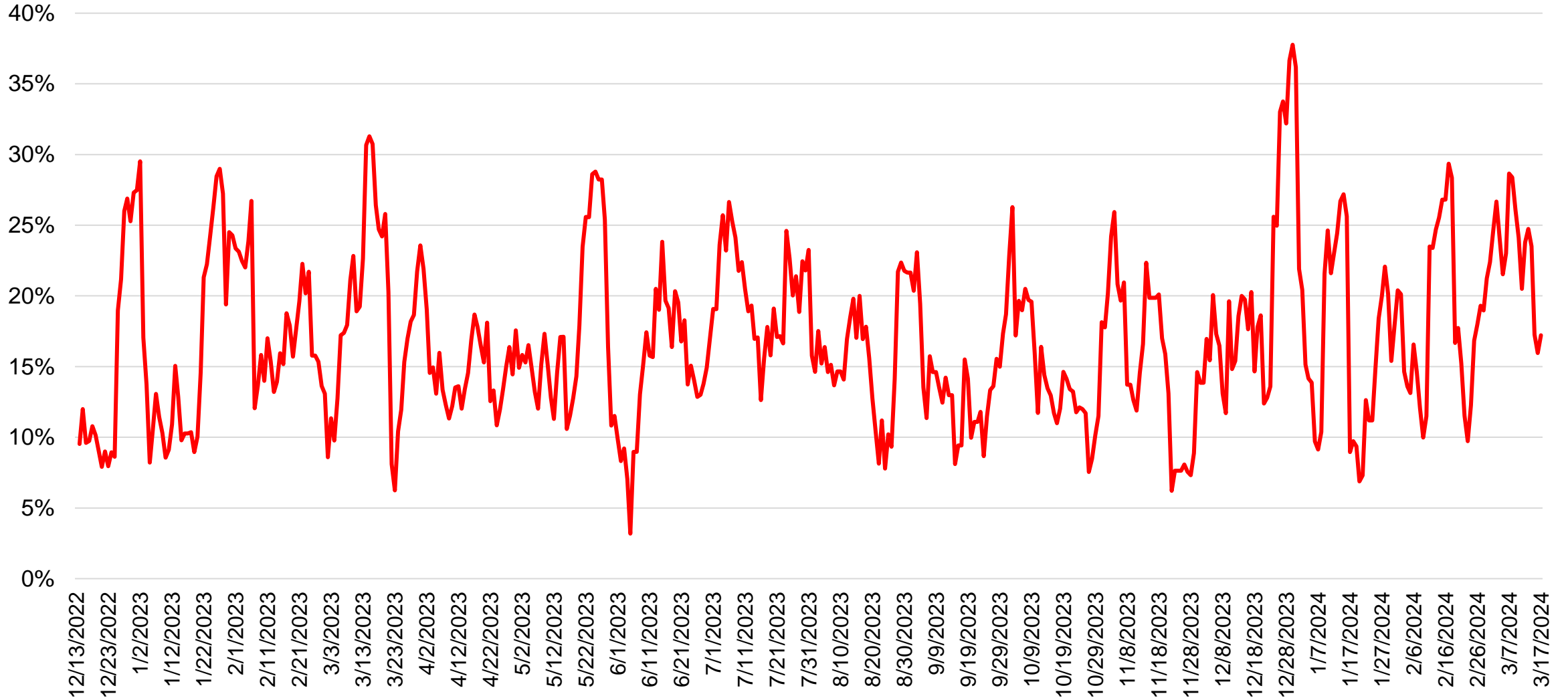
Samples for Kaua'i, Moloka'i and Lāna'i are small

Japan Favorability Two-Week Moving Average



Source: Vision Insights Data as of March 18, 2024
 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 18, 2024

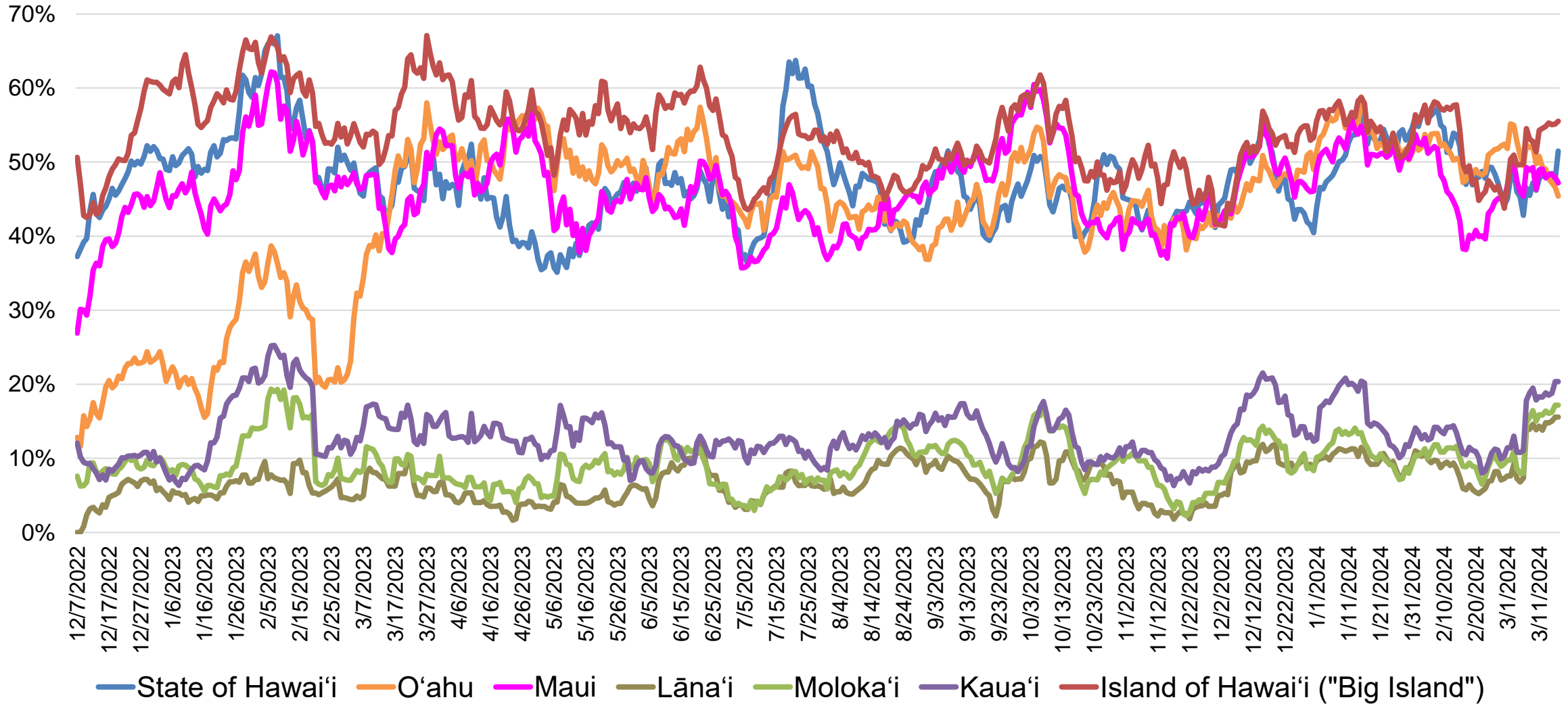


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Australia Destination Brand Health Trends

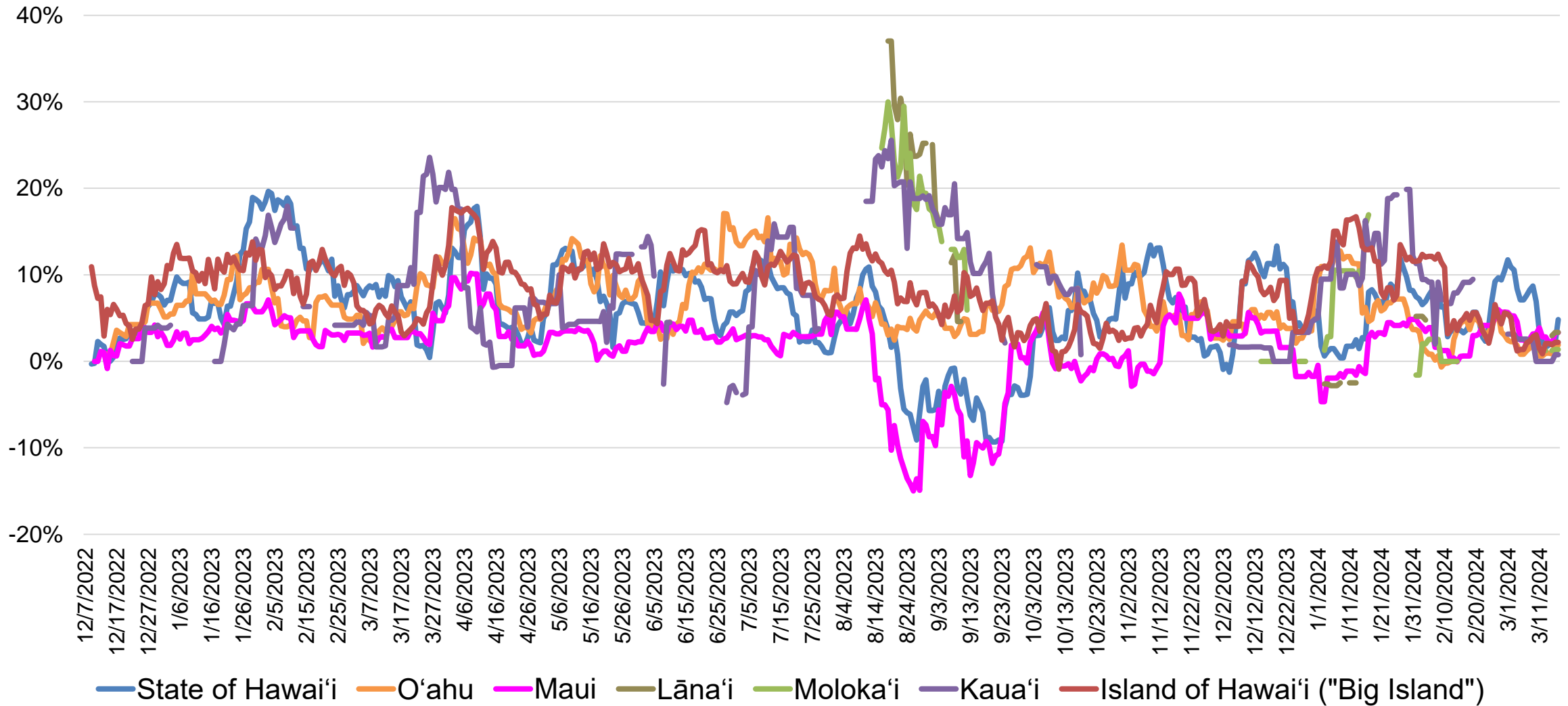


Australia Destination Awareness Two-Week Moving Average



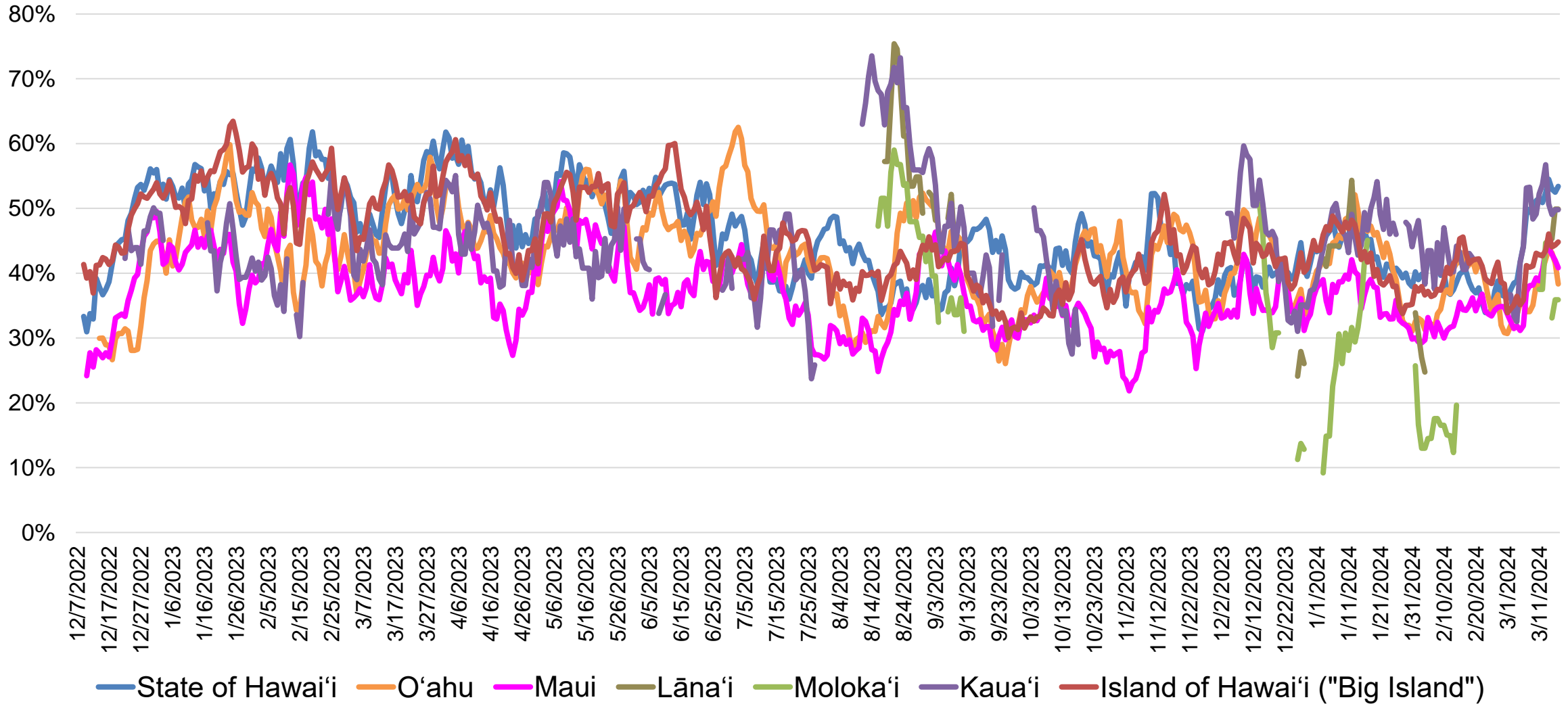
Source: Vision Insights Data as of March 18, 2024

Australia Chatter (Net) Two-Week Moving Average



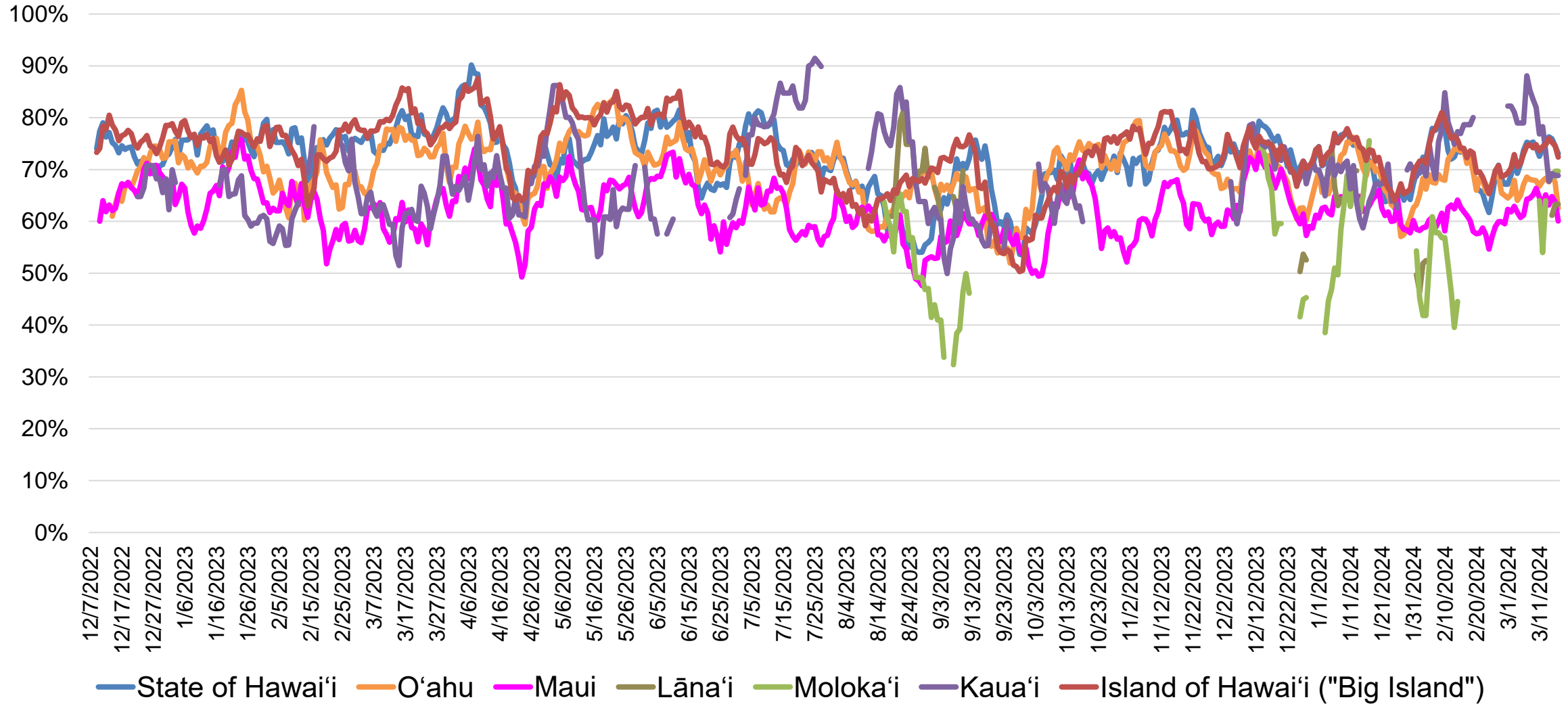
Source: Vision Insights Data as of March 18, 2024
Samples for Kaua'i, Moloka'i, and Lāna'i are limited

Australia Consideration Two-Week Moving Average



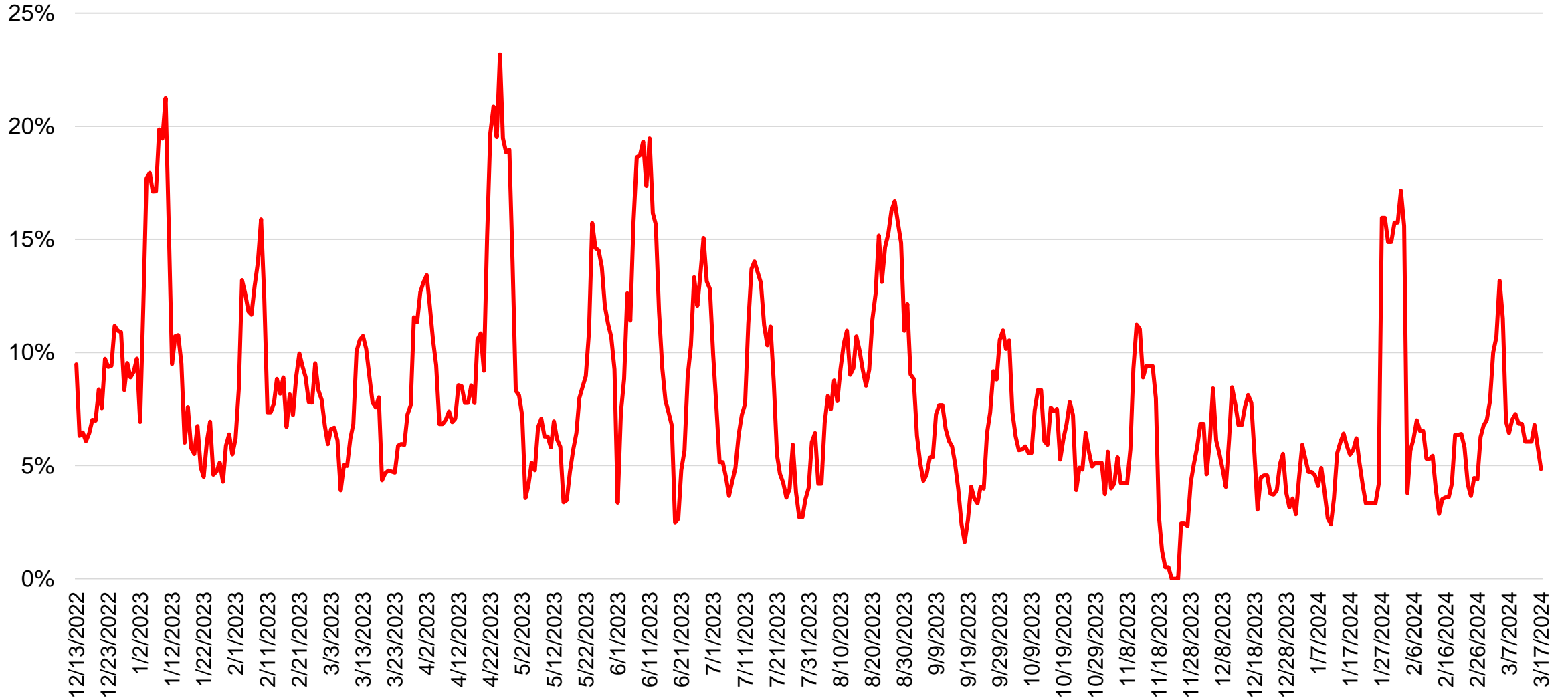
Source: Vision Insights Data as of March 18, 2024
Samples for Kaua'i, Moloka'i, and Lāna'i are limited

Australia Favorability Two-Week Moving Average



Source: Vision Insights Data as of March 18, 2024
 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 18, 2024



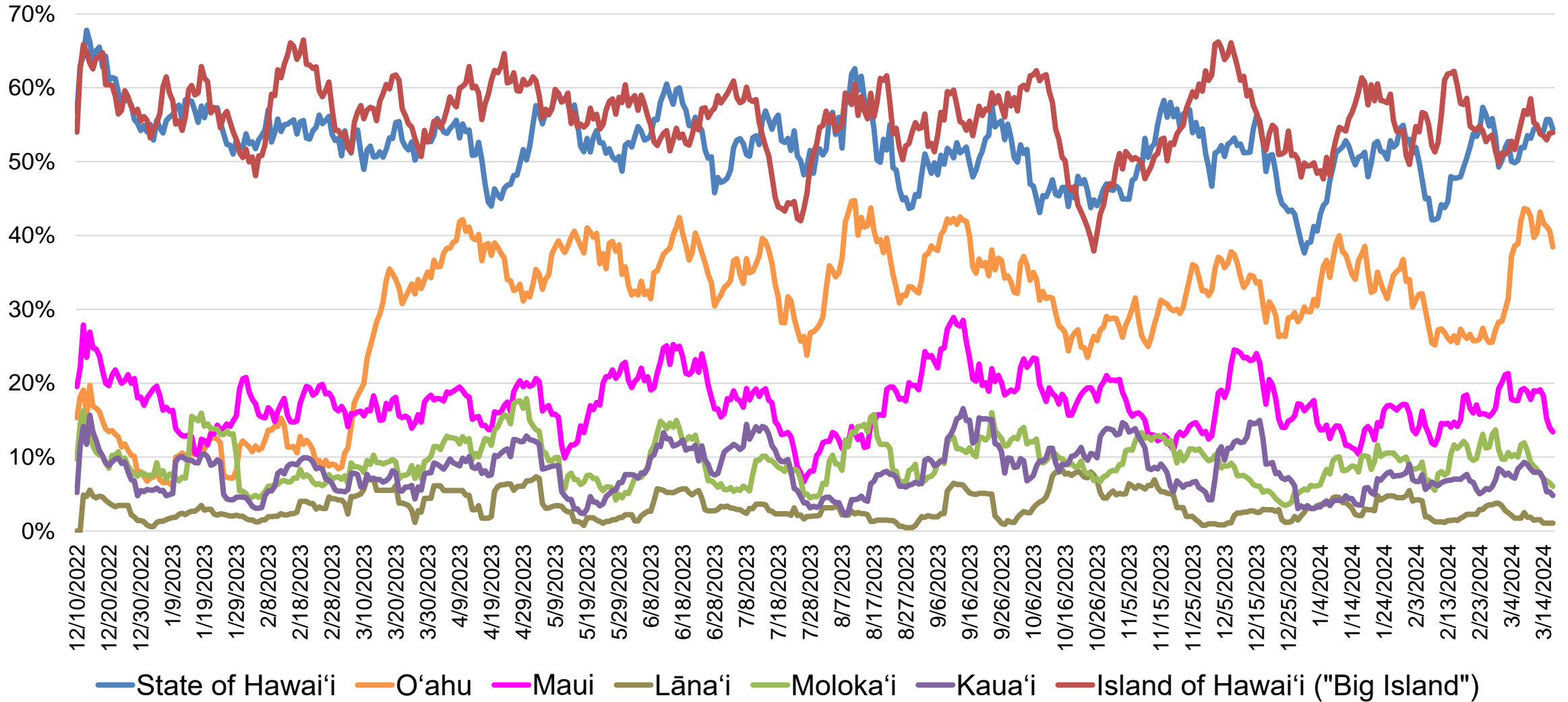
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Korea

Destination Brand Health Trends

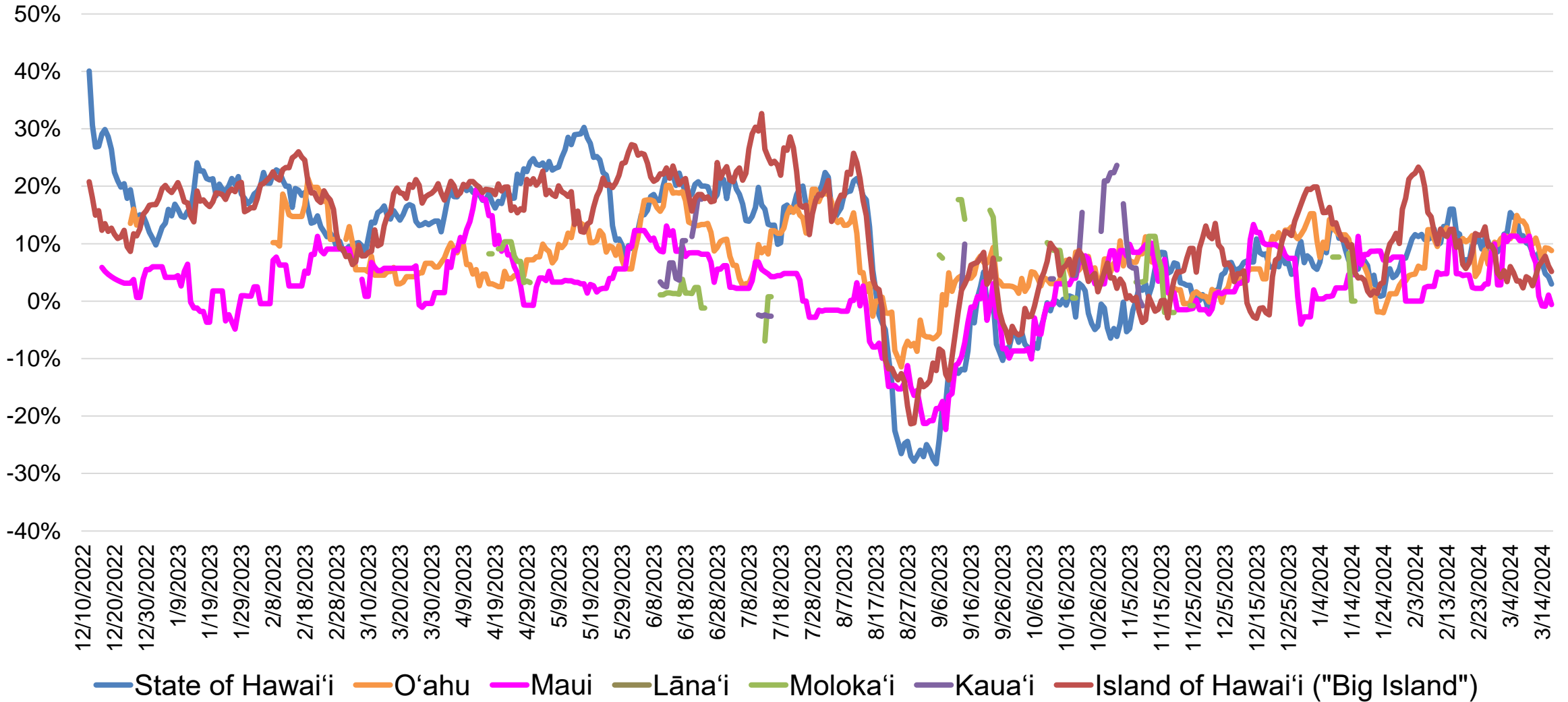


Korea Destination Awareness Two-Week Moving Average



Source: Vision Insights Data as of March 18, 2024

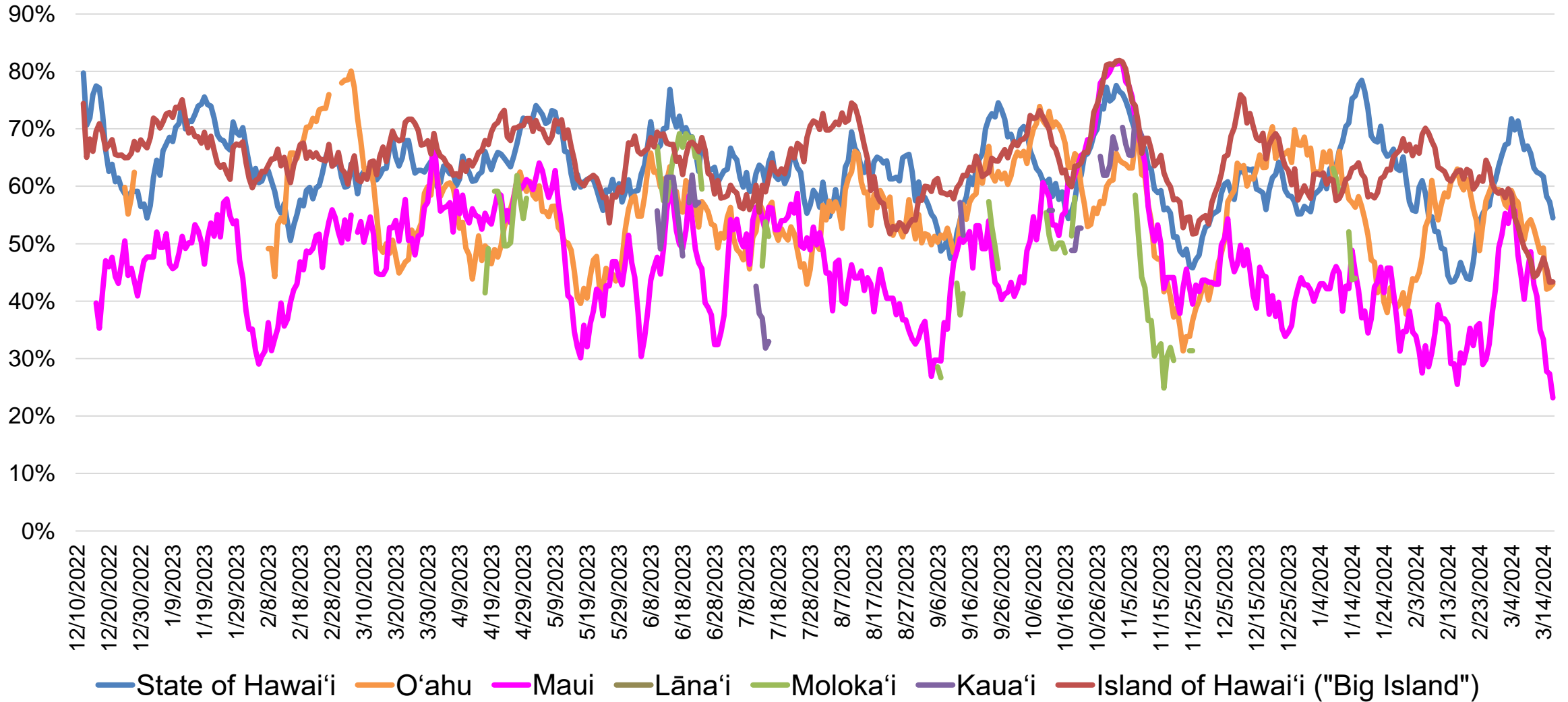
Korea Chatter (Net) Two-Week Moving Average



Source: Vision Insights Data as of March 18, 2024

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

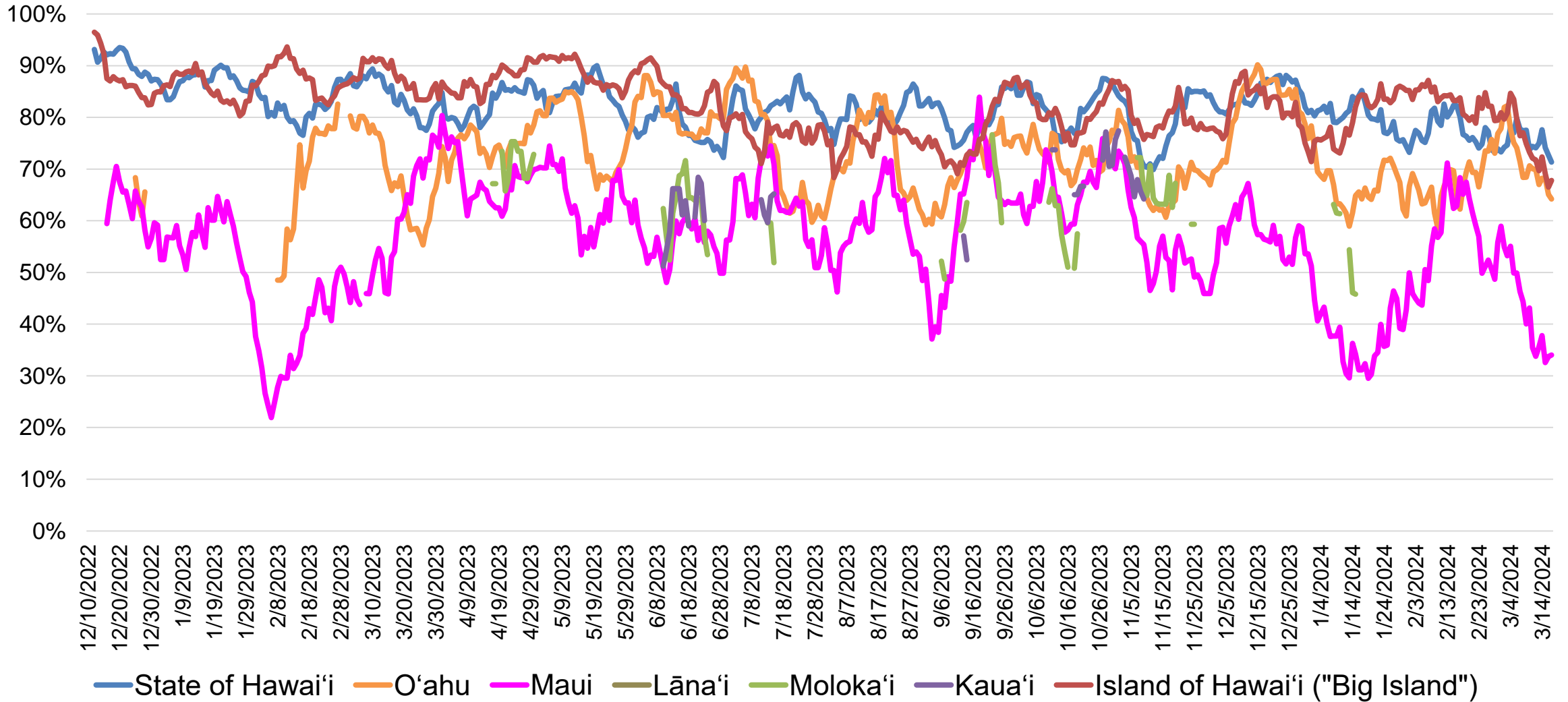
Korea Consideration Two-Week Moving Average



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

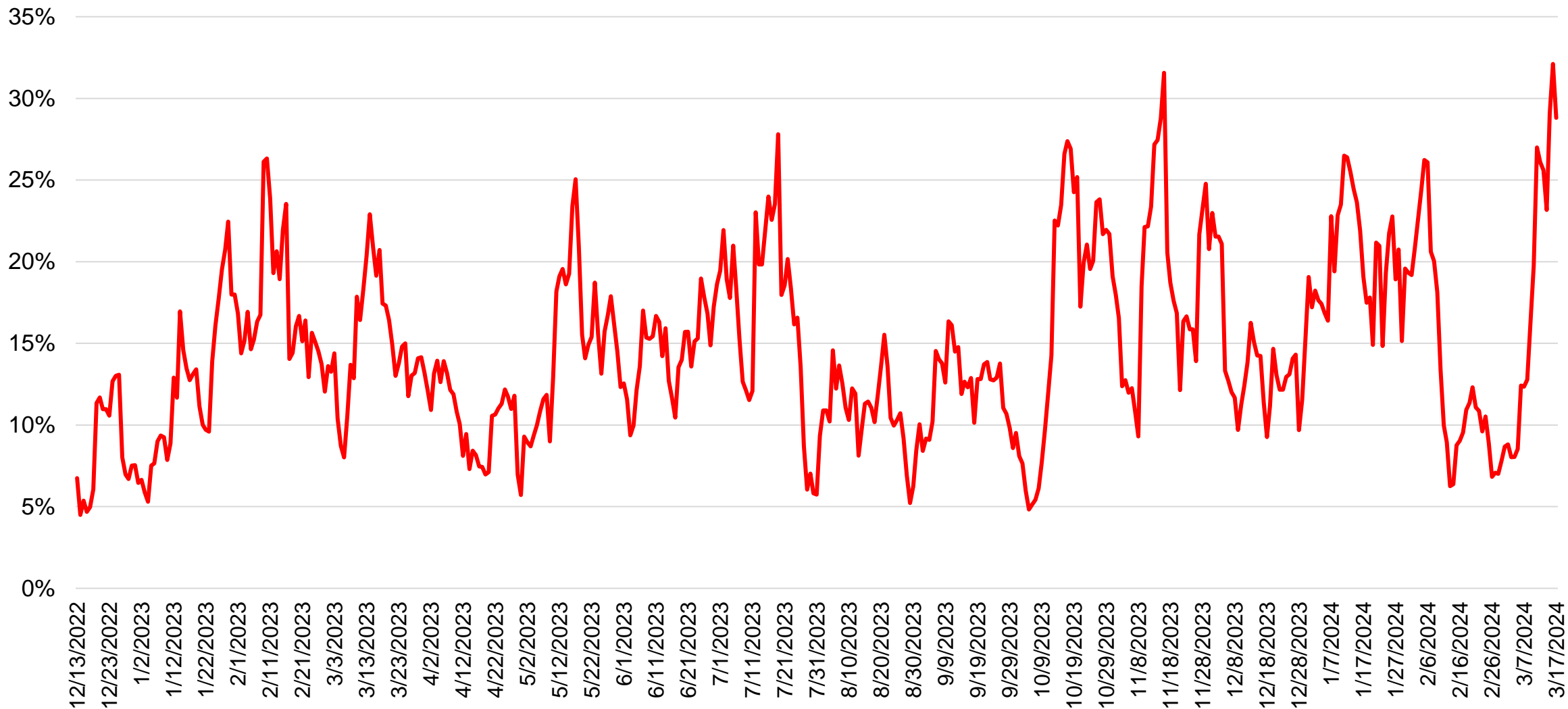
Korea Favorability Two-Week Moving Average



Source: Vision Insights Data as of March 18, 2024

Samples for O'ahu, 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 18, 2024