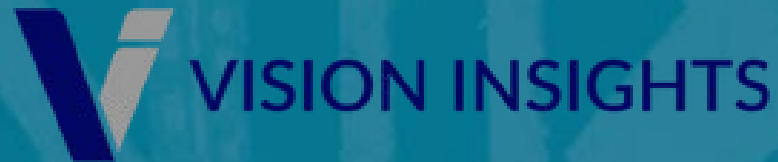




STATE OF HAWAII • DEPARTMENT OF BUSINESS,
ECONOMIC DEVELOPMENT & TOURISM

Vision Insights Destination Brand Health Trends

May 21, 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

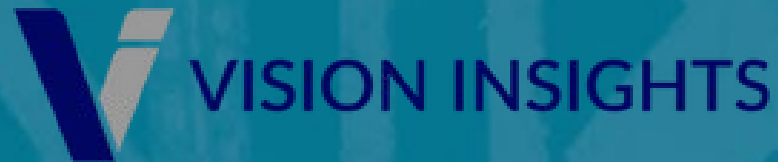
**September 27,
2023 –**
Maui County
Mayor Richard
Bissen
announces a
three-phase
approach to re-
opening West
Maui to visitors
starting
October 8,
2023

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

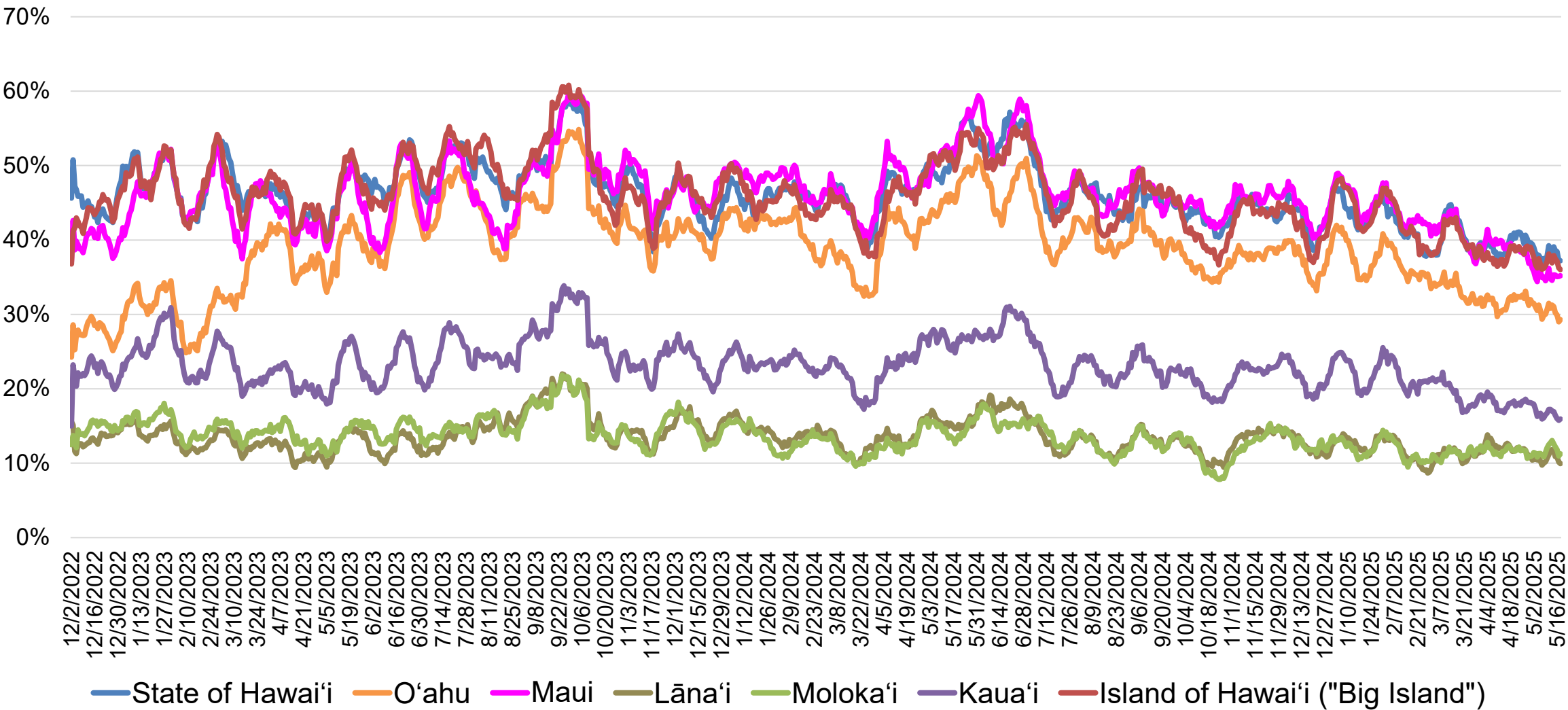


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United States Destination Brand Health Trends

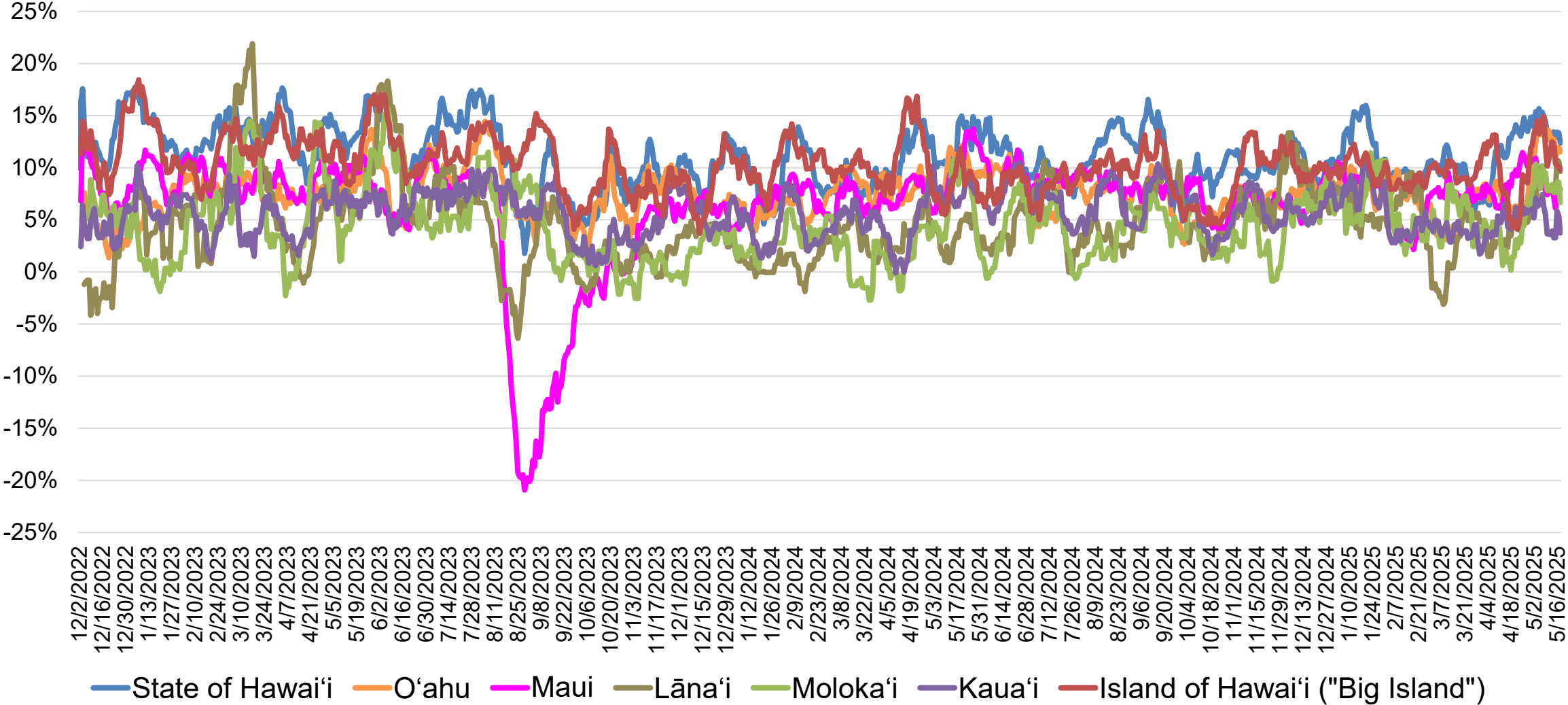


U.S. Destination Awareness Two-Week Moving Average



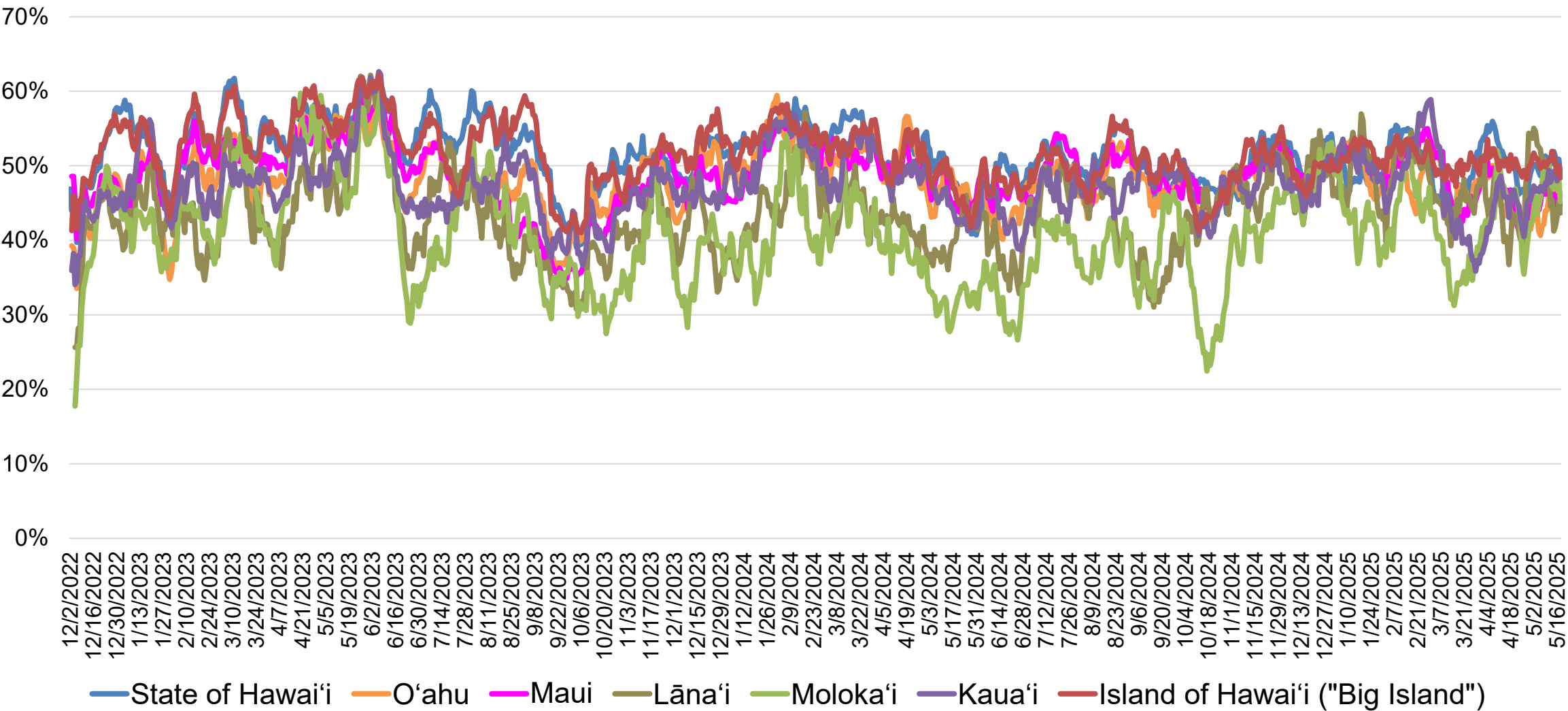
Source: Vision Insights Data as of May 21, 2025

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



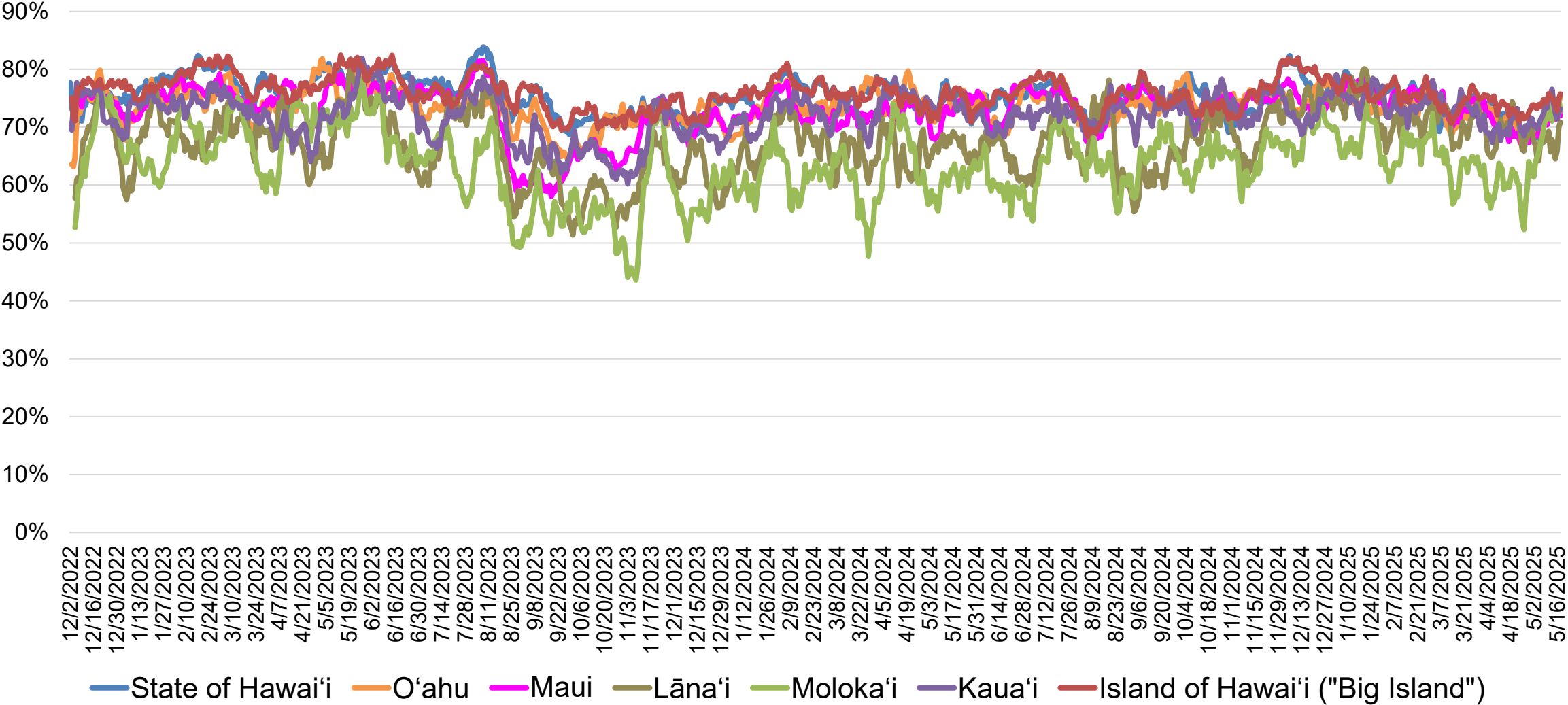
Source: Vision Insights Data as of May 21, 2025

U.S. Consideration Two-Week Moving Average



Source: Vision Insights Data as of May 21, 2025

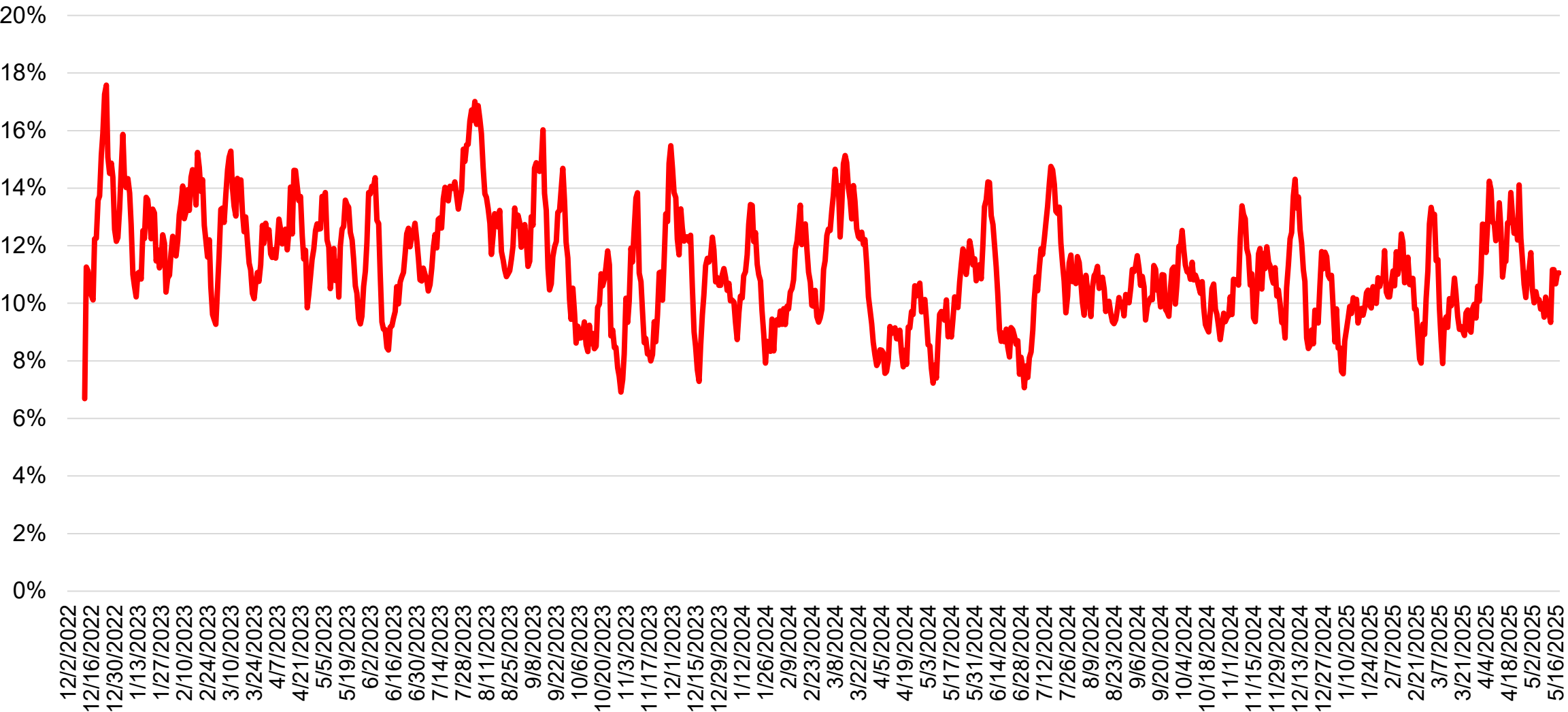
U.S. Favorability Two-Week Moving Average



Source: Vision Insights Data as of May 21, 2025

U.S. Intent to Travel to Any Hawaiian Island

One-Week Moving Average

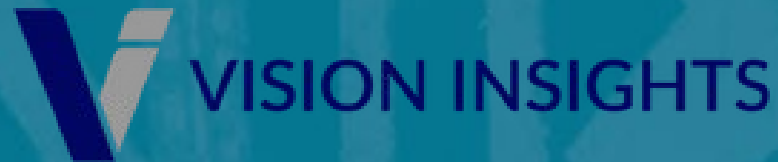


Source: Vision Insights Data as of May 21, 2025

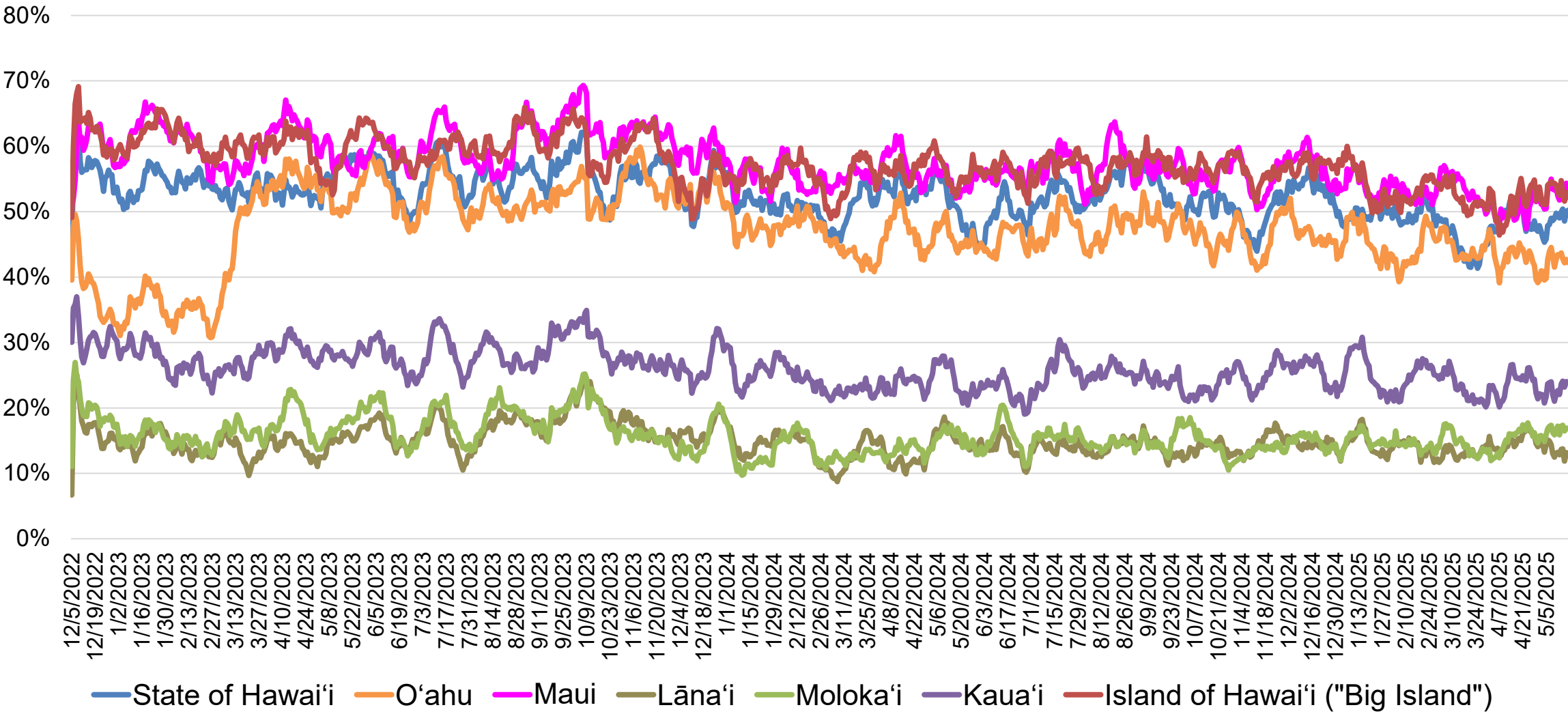


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Canada Destination Brand Health Trends

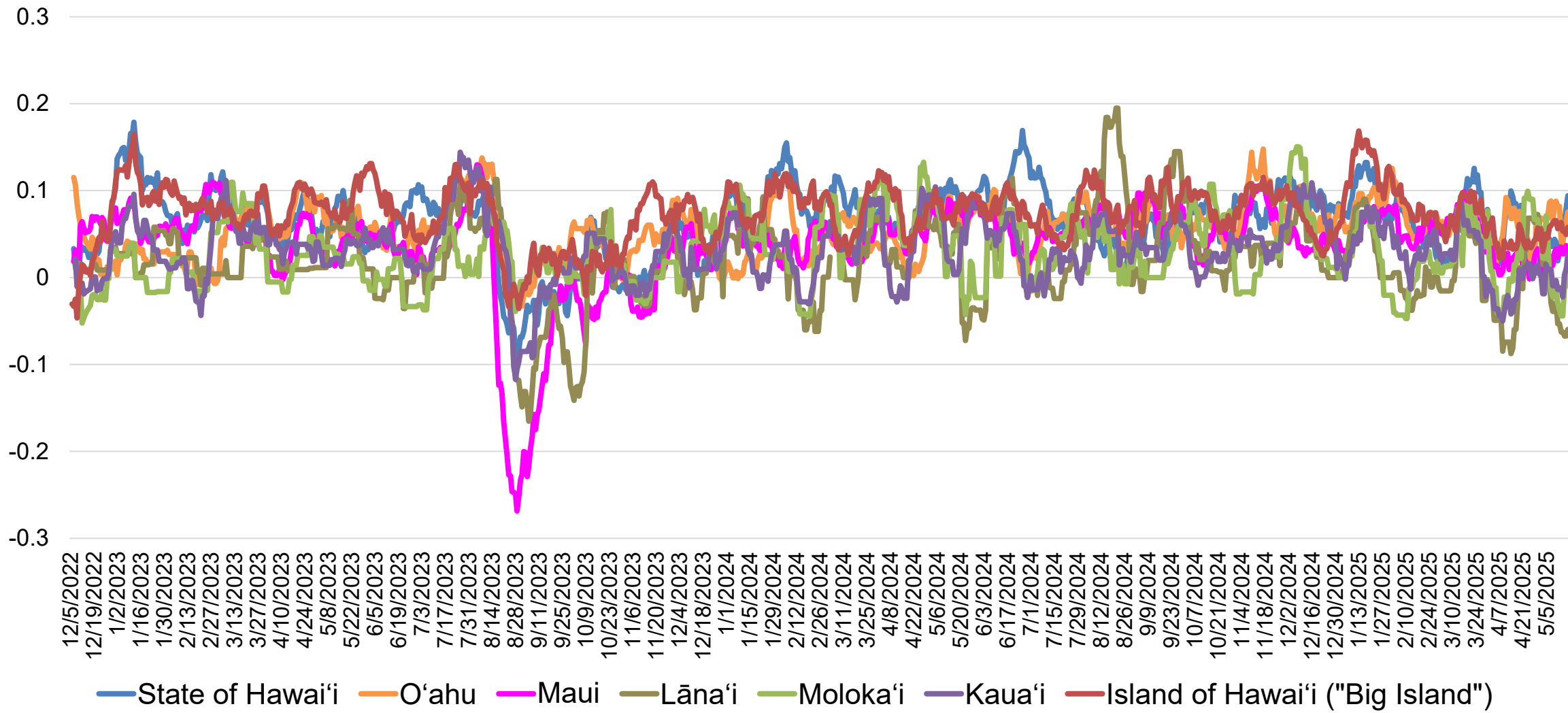


Canada Destination Awareness Two-Week Moving Average



Source: Vision Insights Data as of May 21, 2025

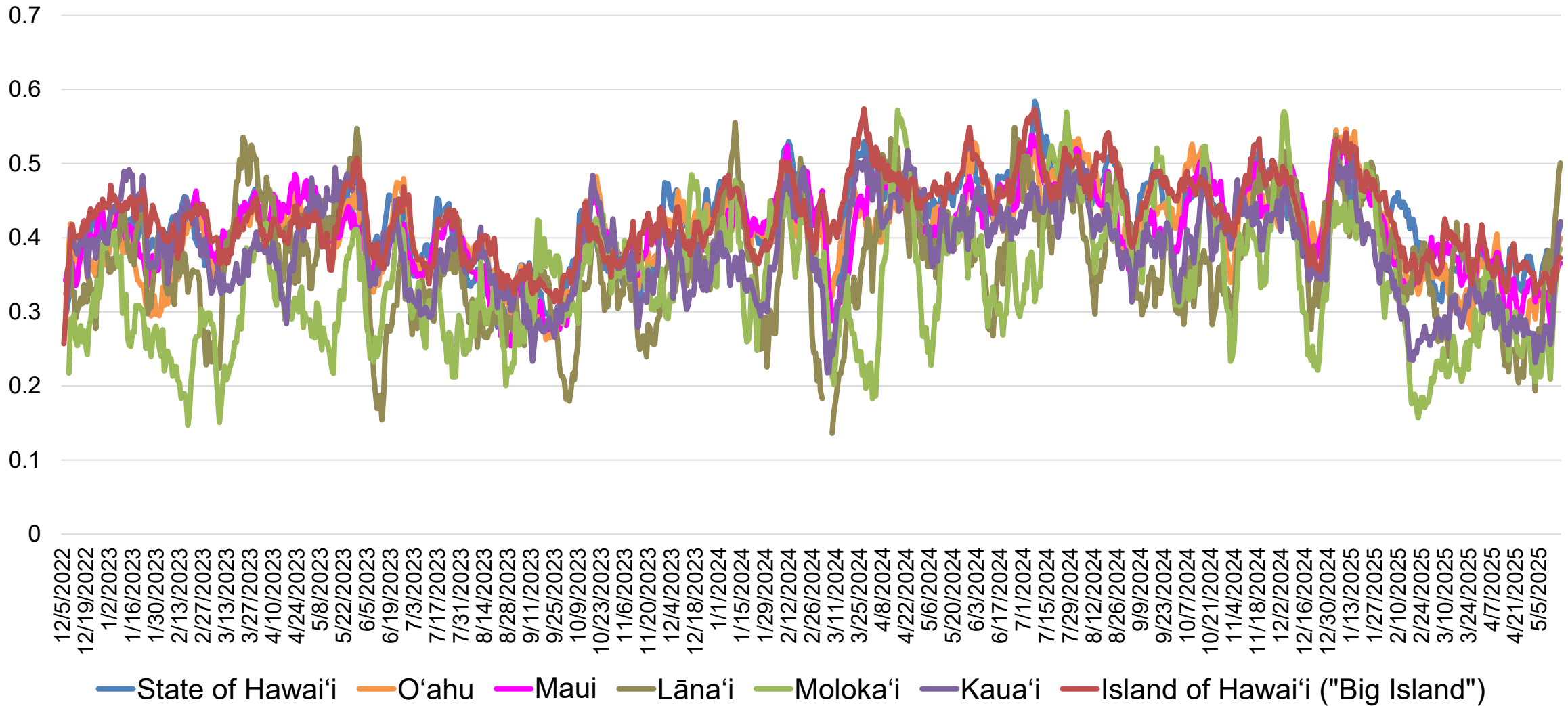
Canada Chatter (Net) Two-Week Moving Average



Source: Vision Insights Data as of May 21, 2025

Samples for Lāna'i are limited

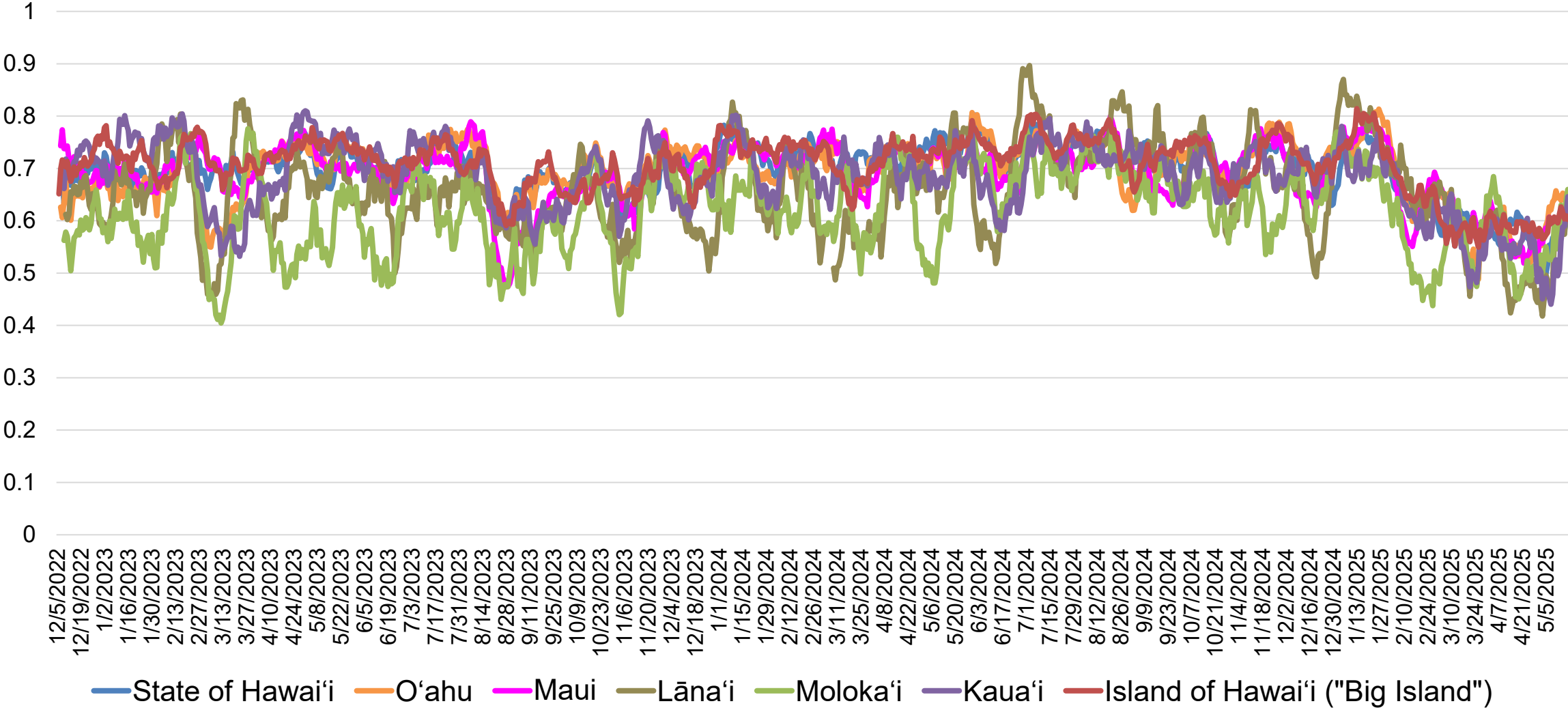
Canada Consideration Two-Week Moving Average



Source: Vision Insights Data as of May 21, 2025

Samples for Lāna'i are limited

Canada Favorability Two-Week Moving Average

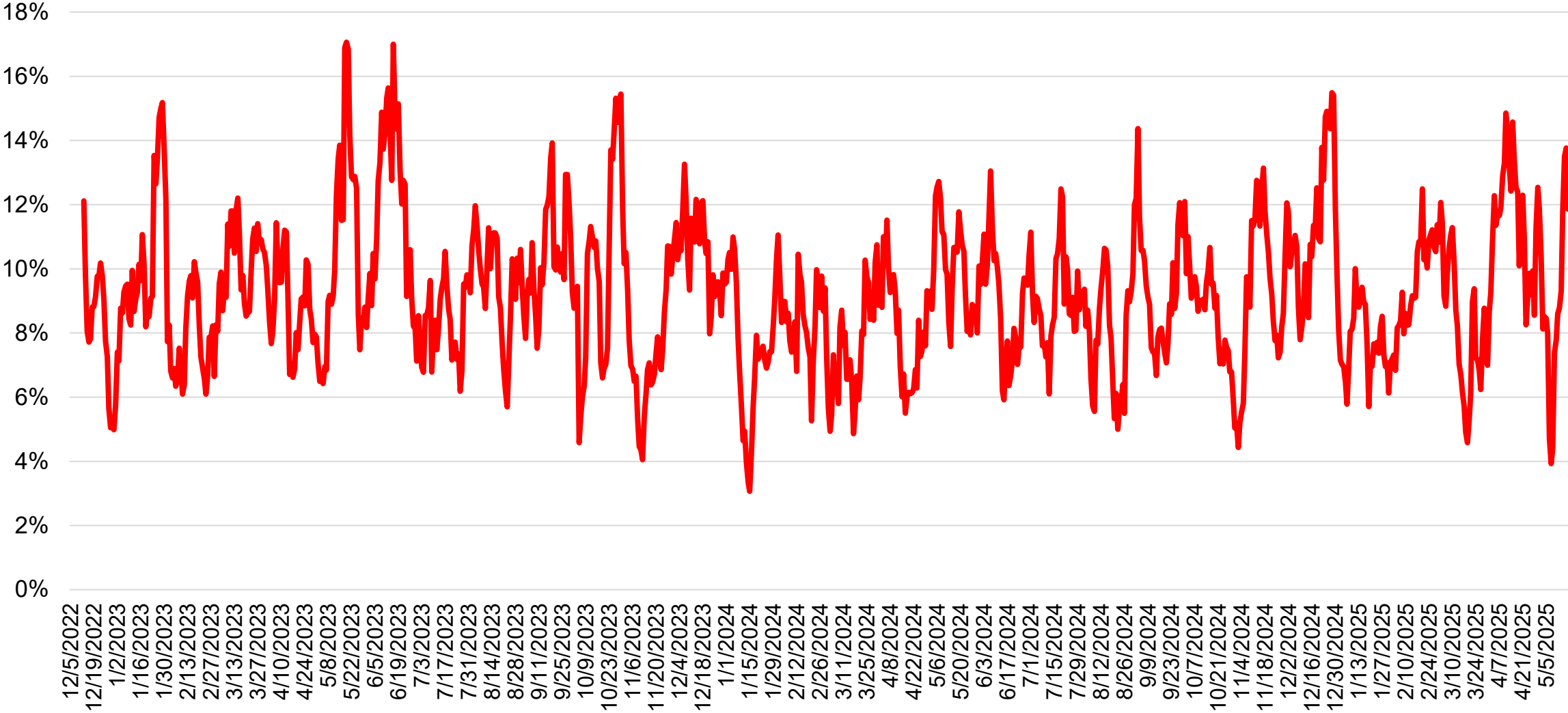


Source: Vision Insights Data as of May 21, 2025

Samples for Lāna'i are limited

Canada Intent to Travel to Any Hawaiian Island

One-Week Moving Average

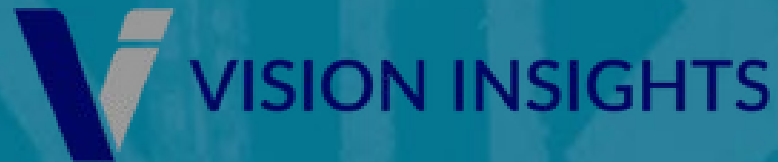


Source: Vision Insights Data as of May 21, 2025

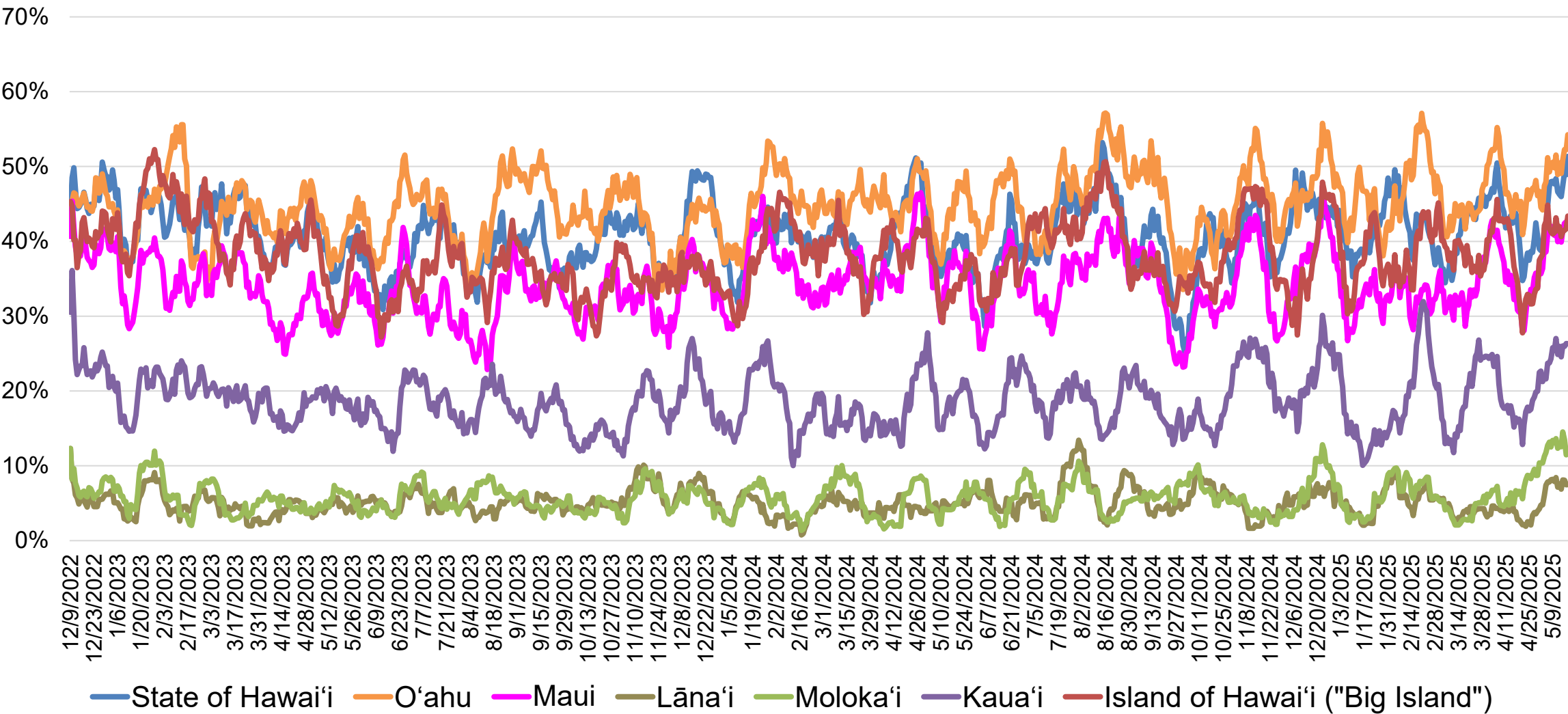


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Japan Destination Brand Health Trends

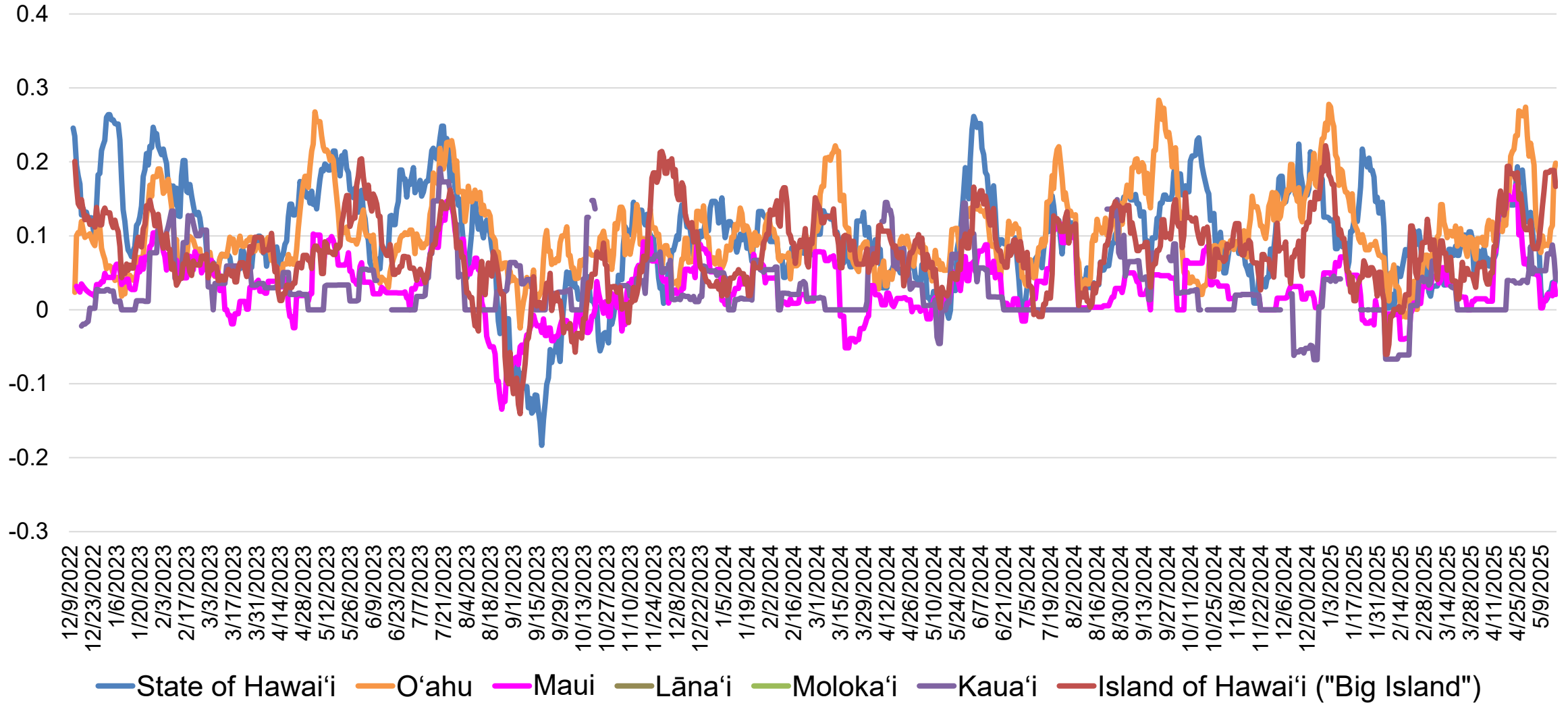


Japan Destination Awareness Two-Week Moving Average



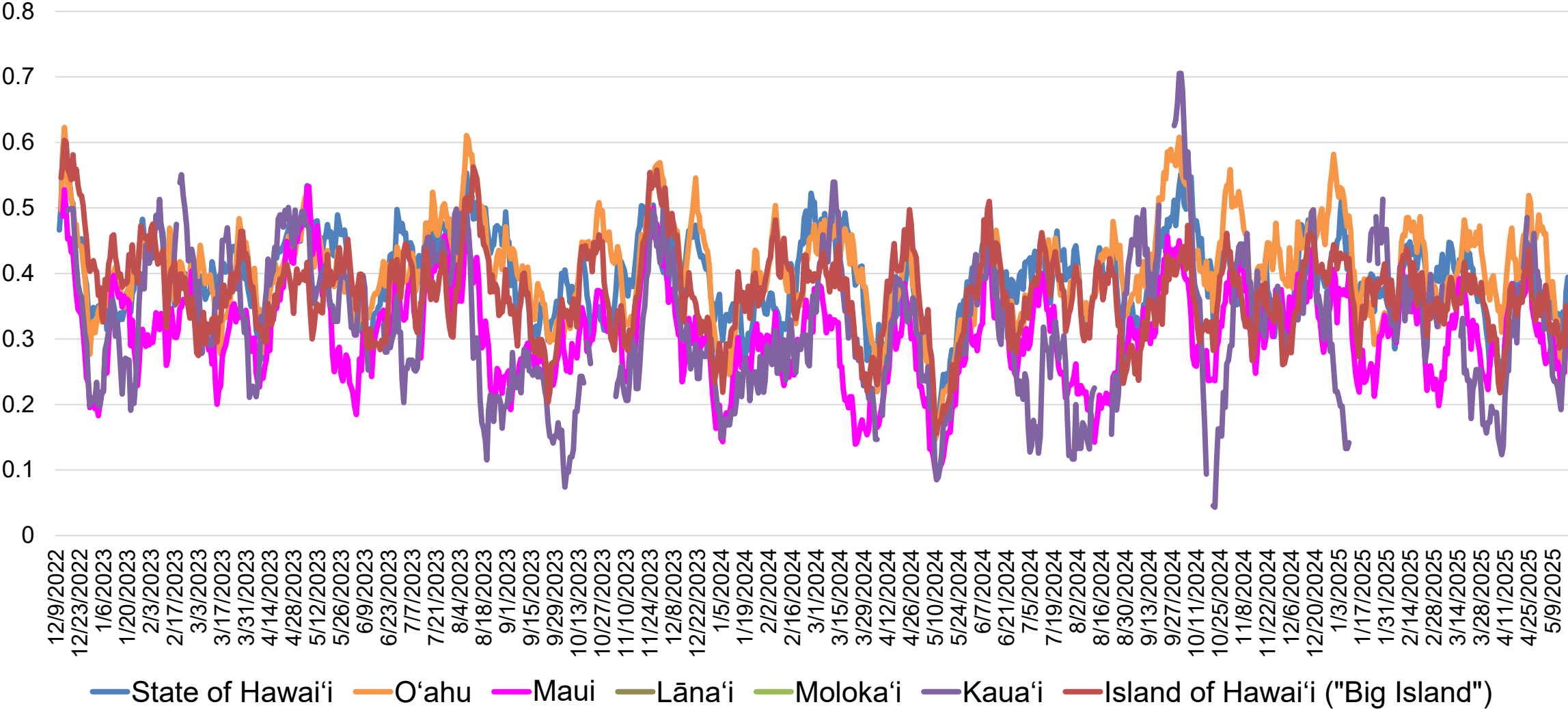
Source: Vision Insights Data as of May 21, 2025

Japan Chatter (Net) Two-Week Moving Average



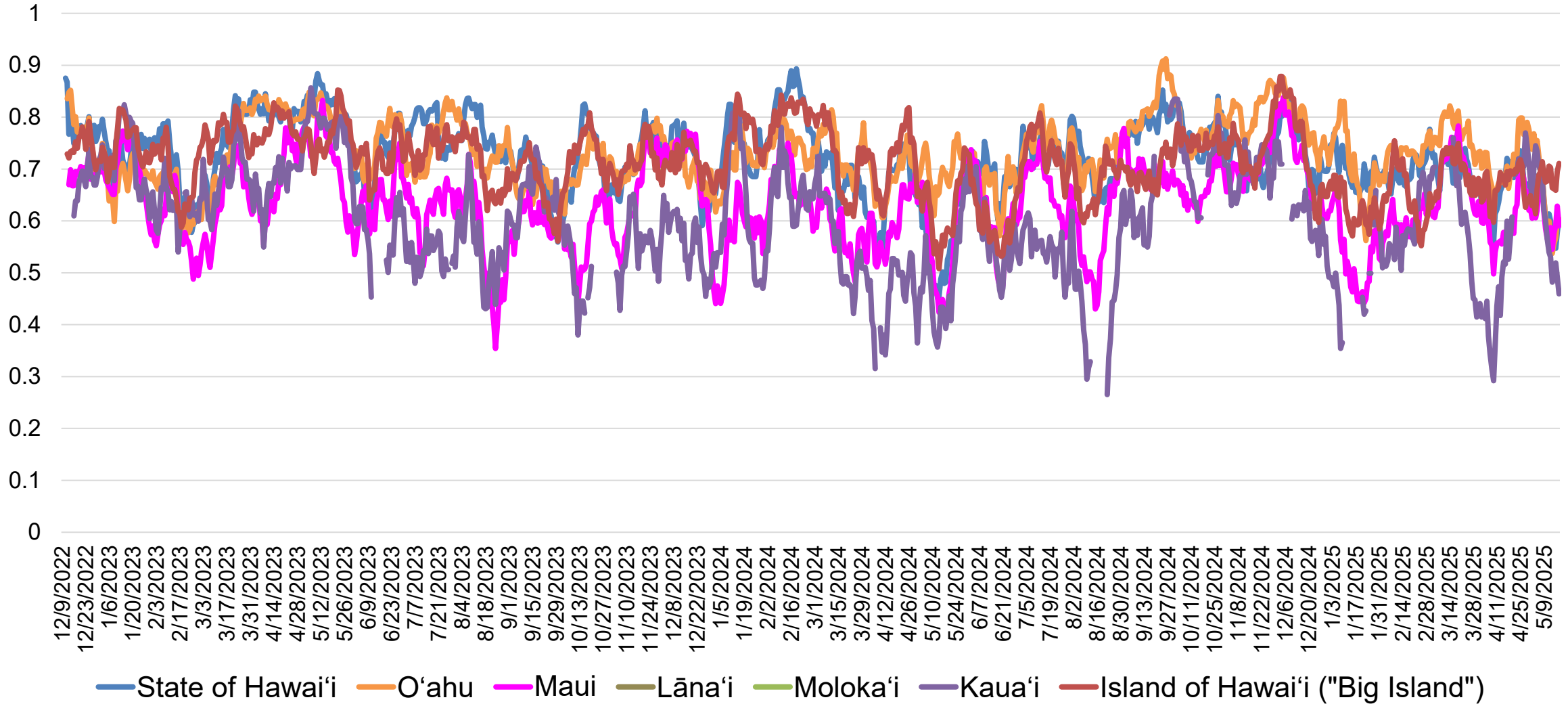
Source: Vision Insights Data as of May 21, 2025
Samples for Kaua'i, Moloka'i and Lāna'i are small

Japan Consideration Two-Week Moving Average



Source: Vision Insights Data as of May 21, 2025
Samples for Kaua'i, Moloka'i and Lāna'i are small

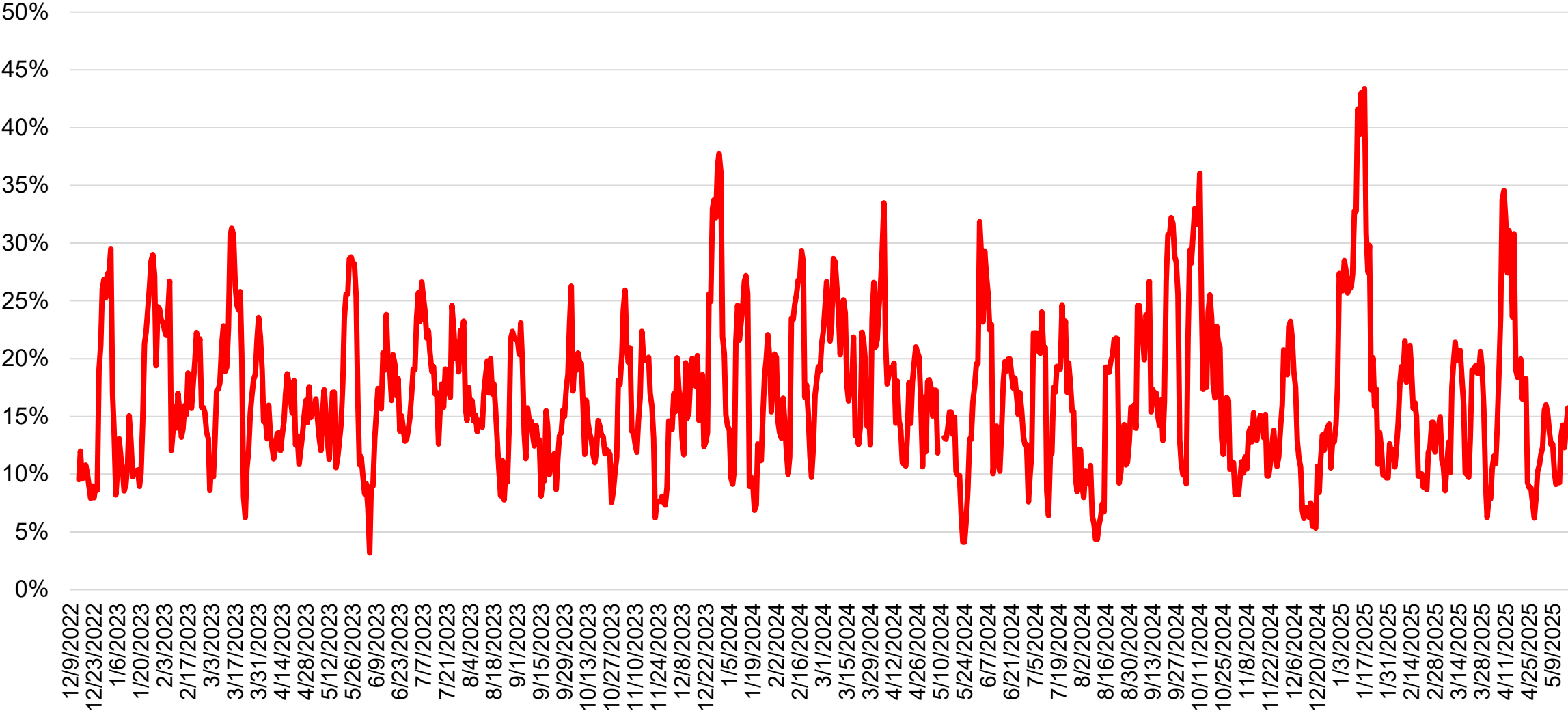
Japan Favorability Two-Week Moving Average



Source: Vision Insights Data as of May 21, 2025
Samples for Kaua'i, Moloka'i and Lāna'i are small

Japan Intent to Travel to Any Hawaiian Island

One-Week Moving Average

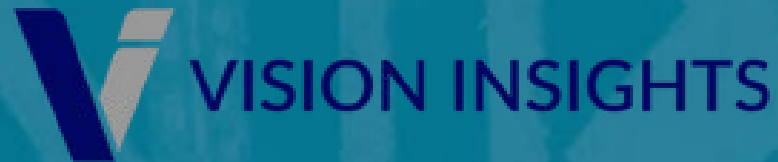


Source: Vision Insights Data as of May 21, 2025

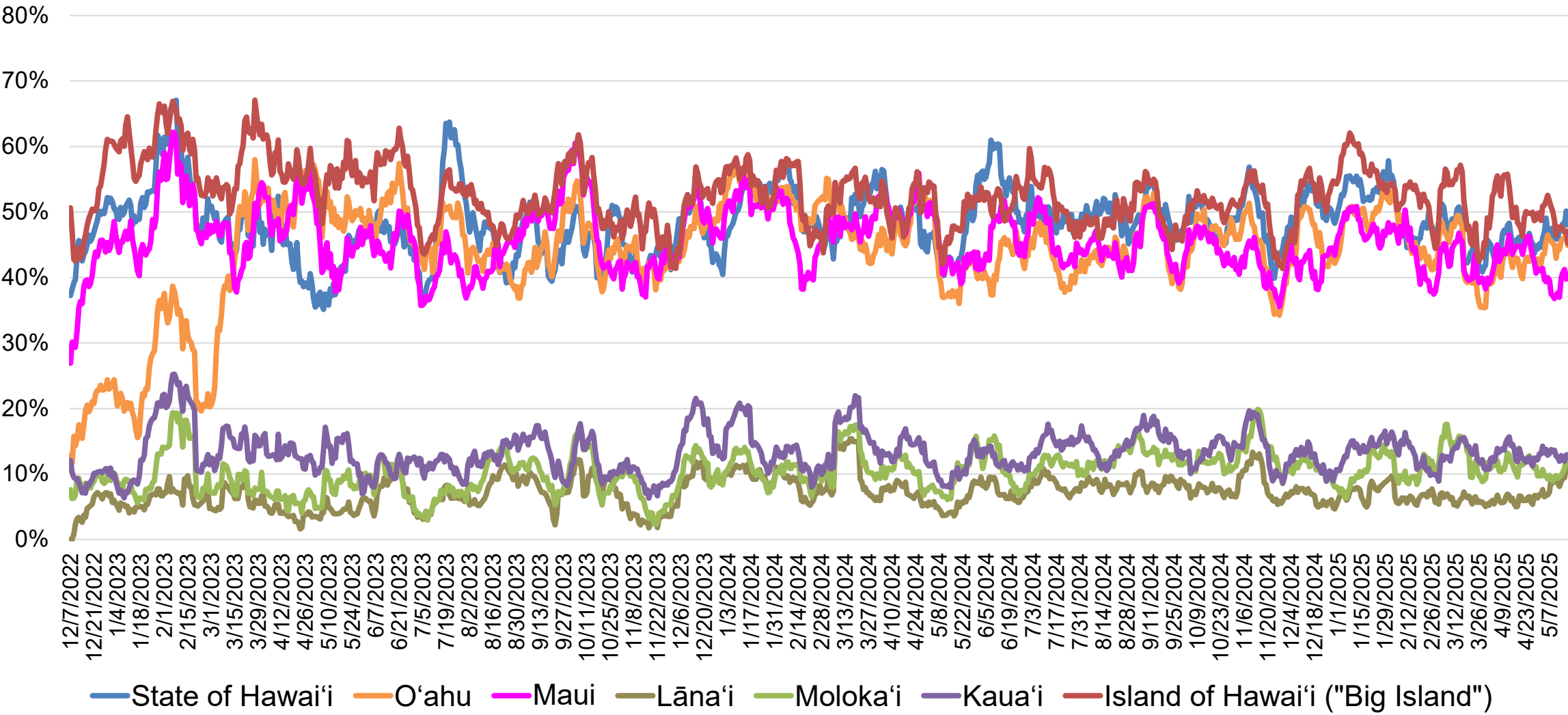


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Australia Destination Brand Health Trends

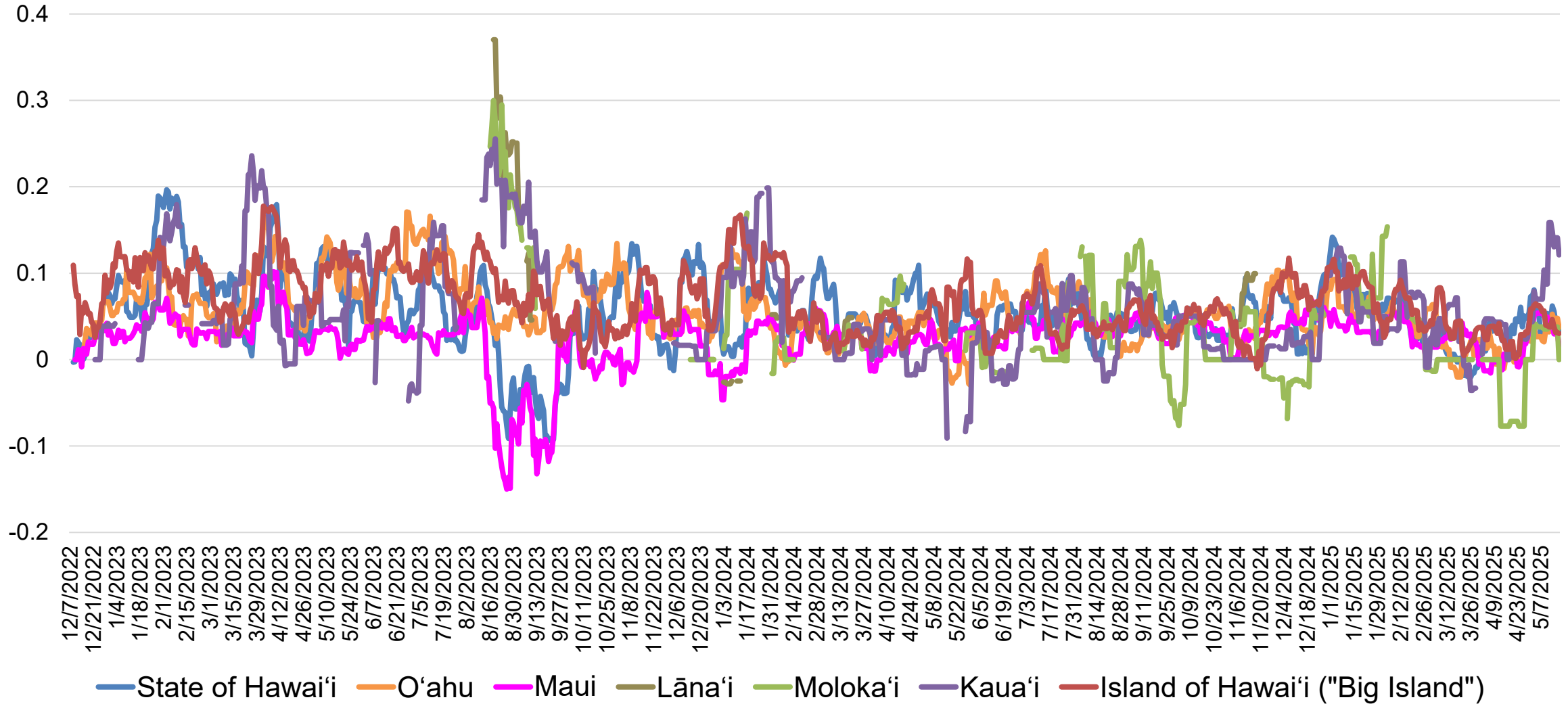


Australia Destination Awareness Two-Week Moving Average



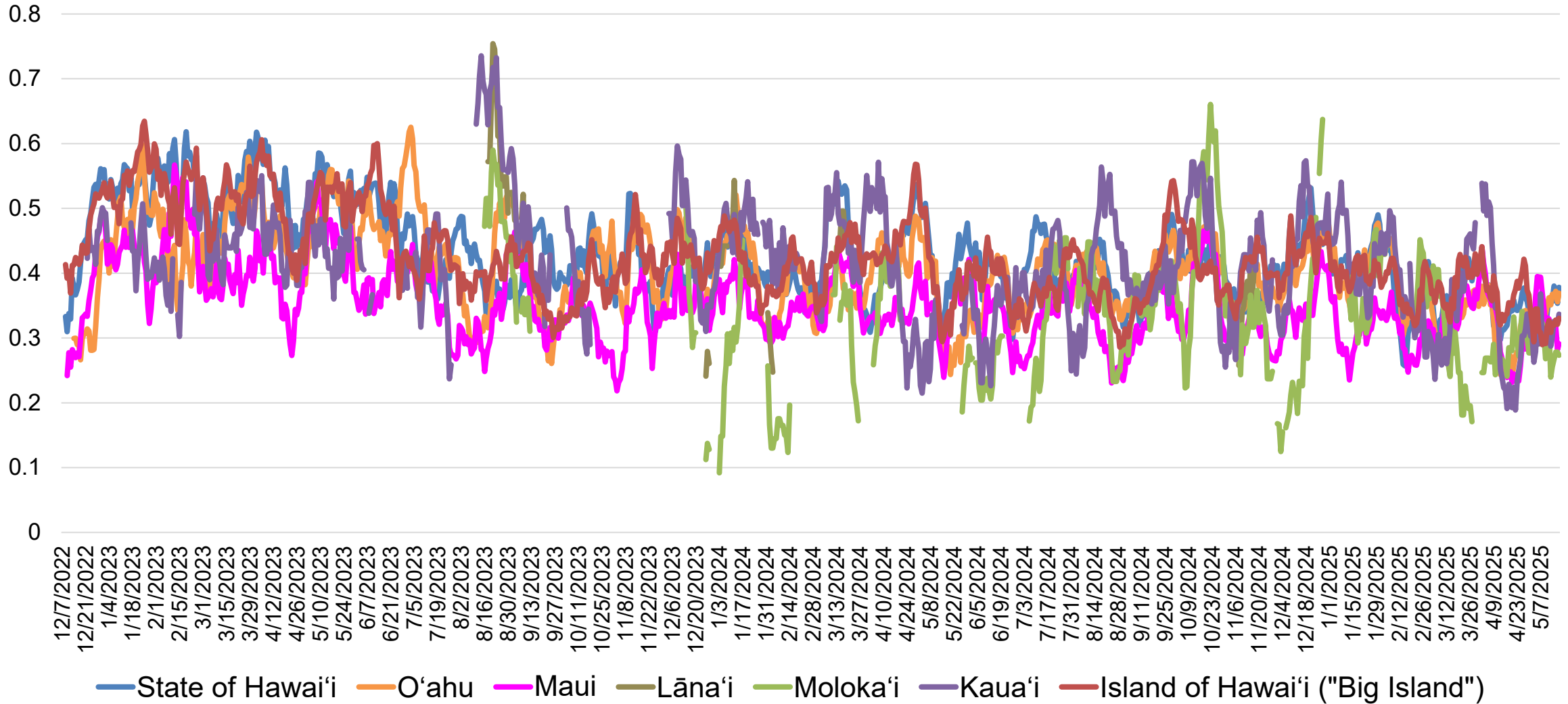
Source: Vision Insights Data as of May 21, 2025

Australia Chatter (Net) Two-Week Moving Average



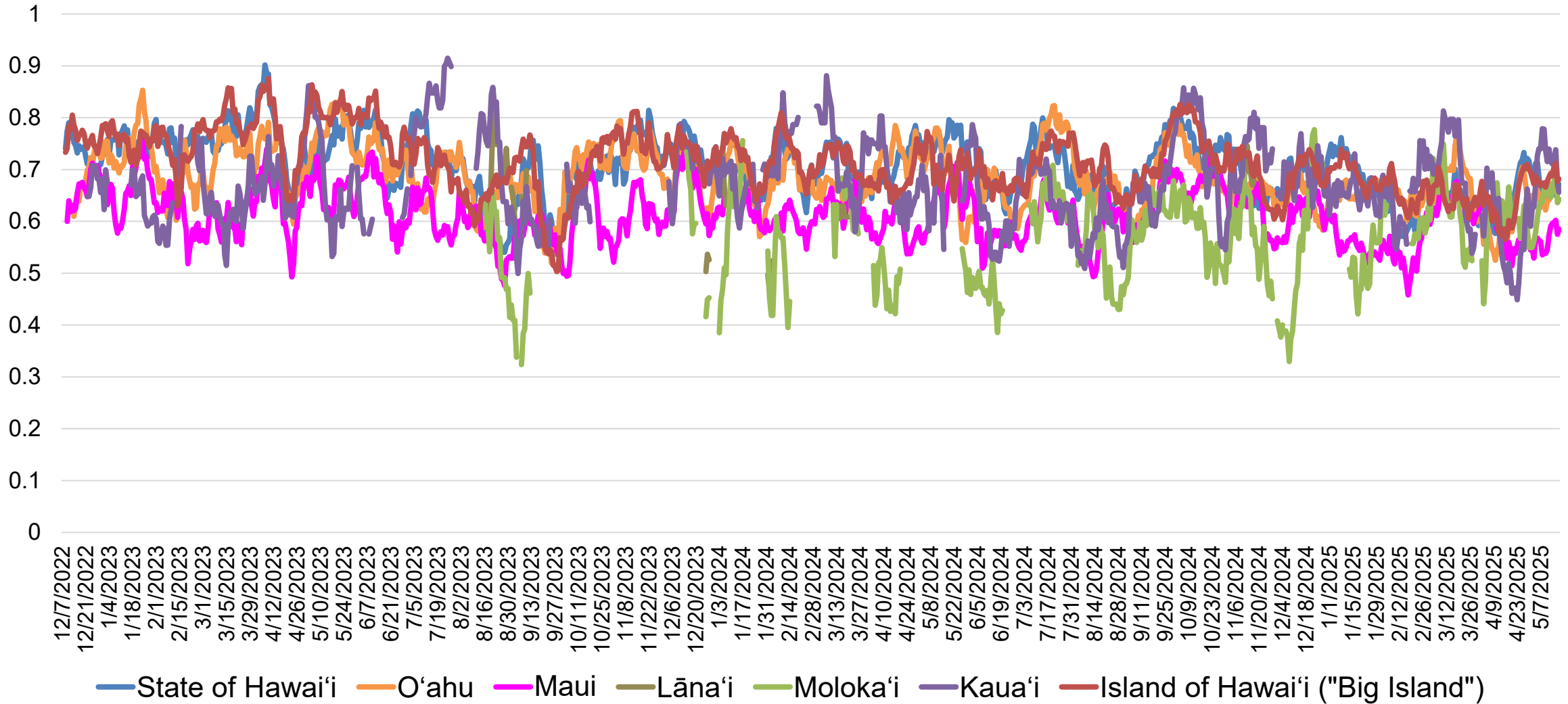
Source: Vision Insights Data as of May 21, 2025
Samples for Kaua'i, Moloka'i, and Lāna'i are limited

Australia Consideration Two-Week Moving Average



Source: Vision Insights Data as of May 21, 2025
Samples for Kaua'i, Moloka'i, and Lāna'i are limited

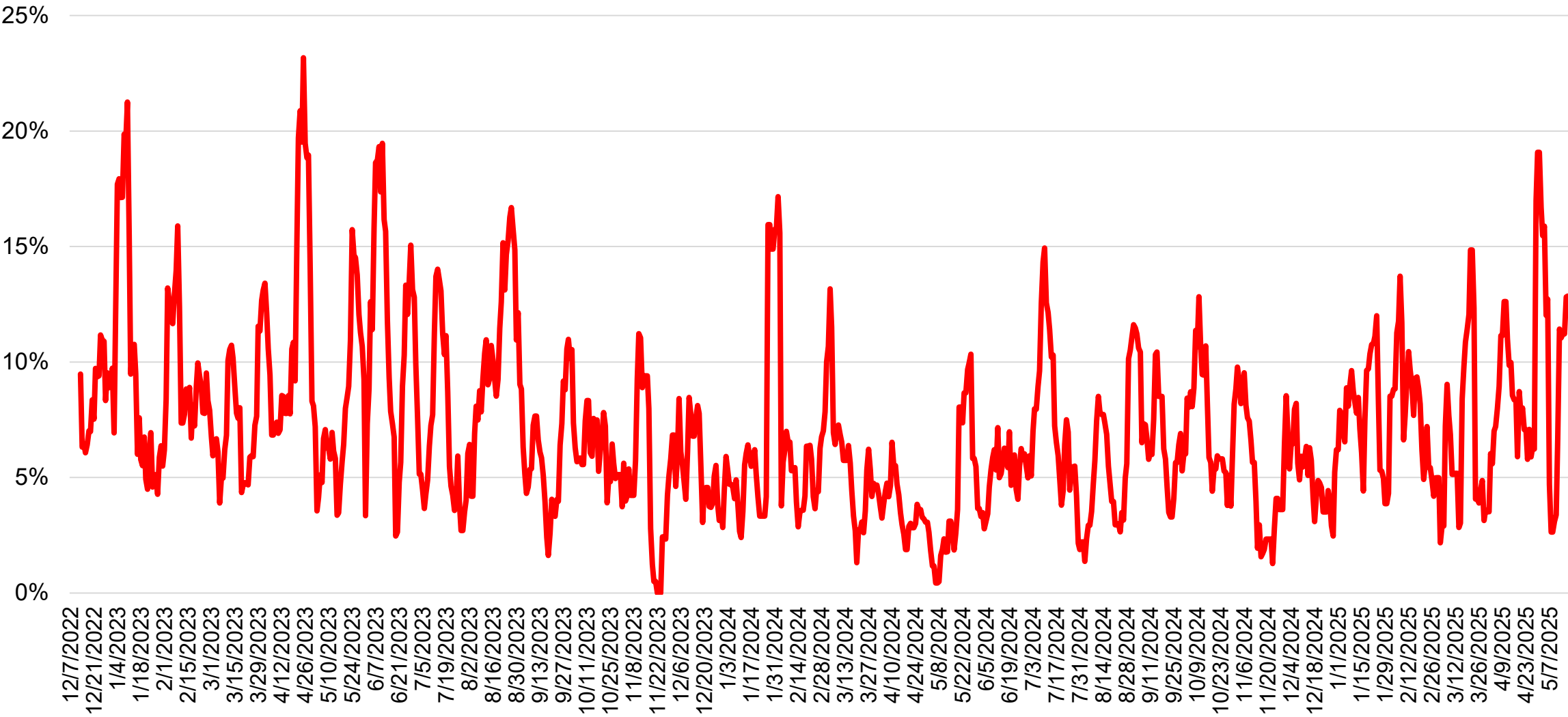
Australia Favorability Two-Week Moving Average



Source: Vision Insights Data as of May 21, 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 May 21, 2025

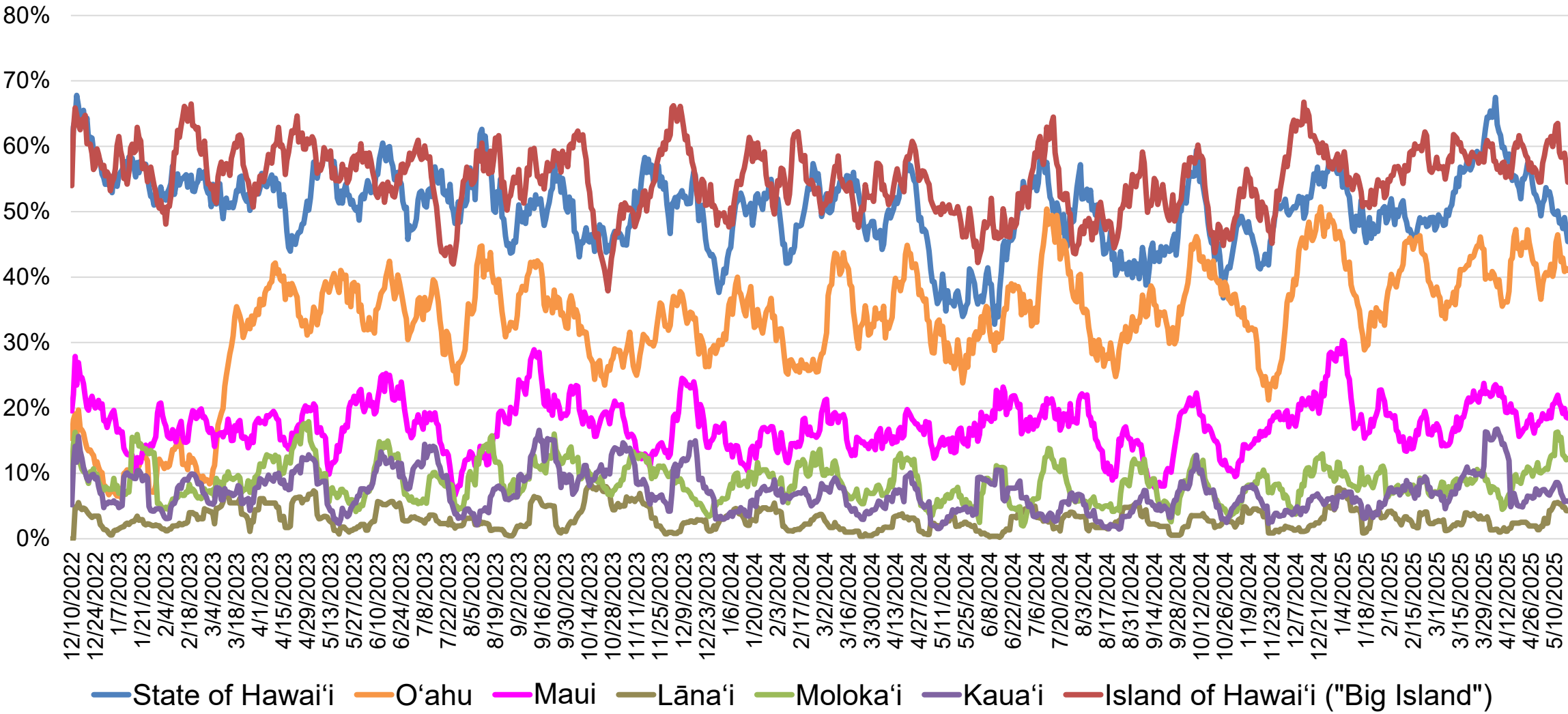


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Korea Destination Brand Health Trends

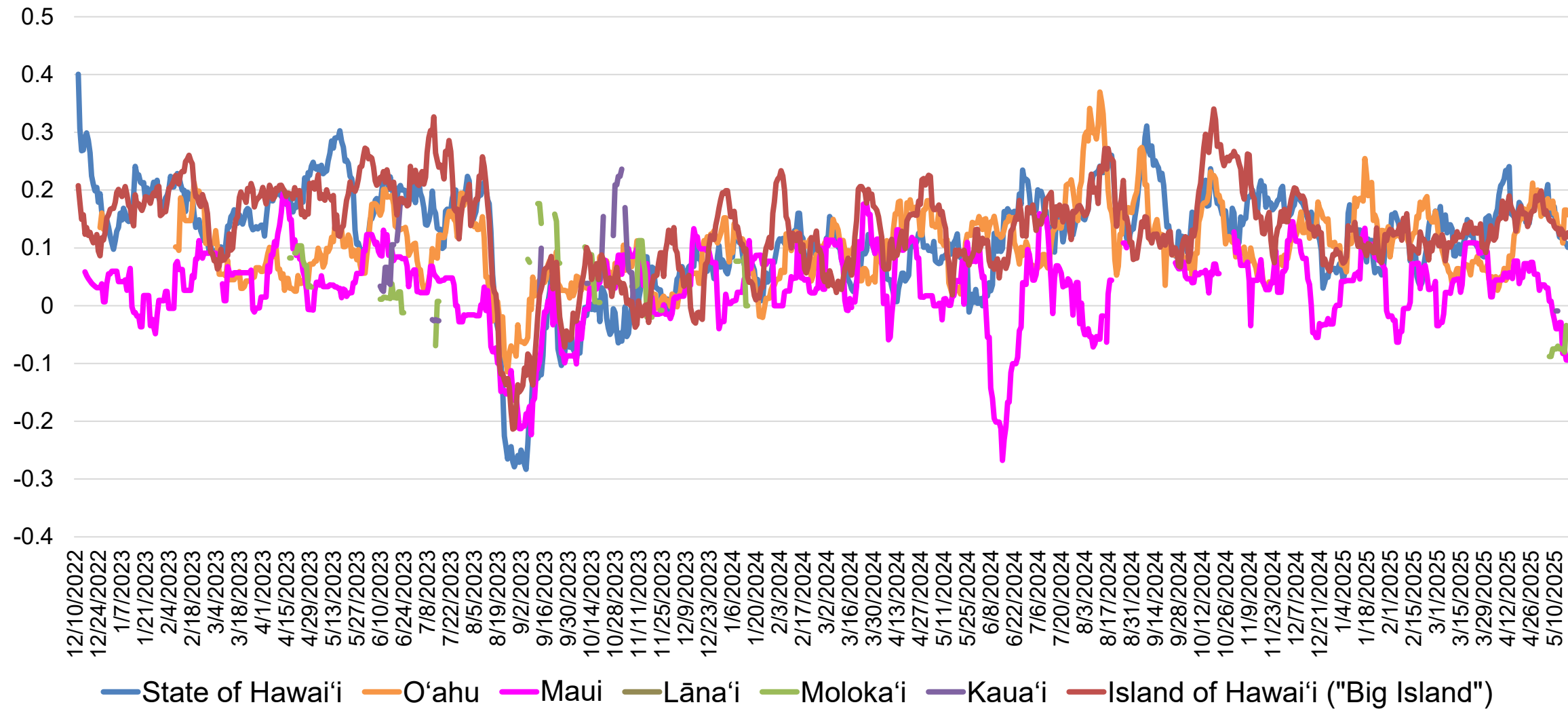


Korea Destination Awareness Two-Week Moving Average



Source: Vision Insights Data as of May 21, 2025

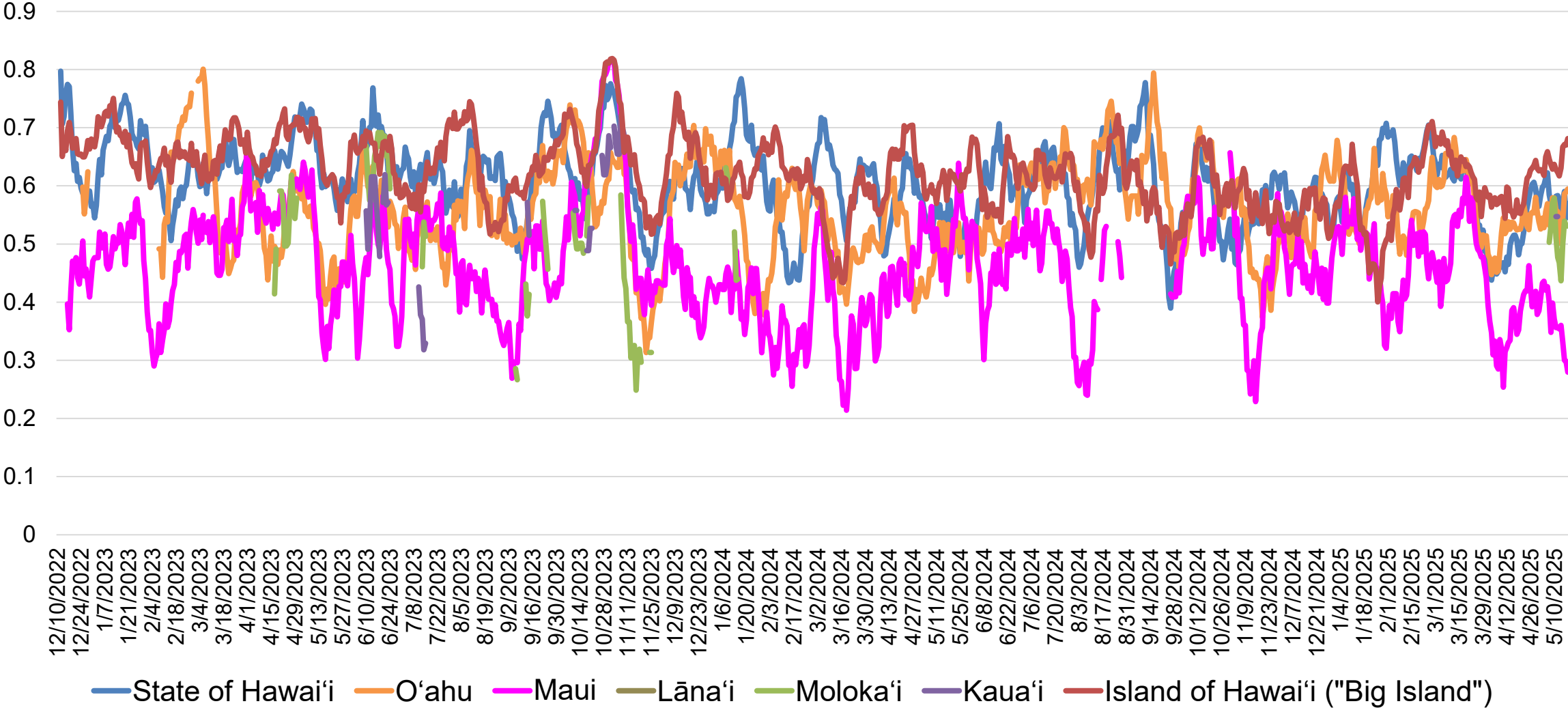
Korea Chatter (Net) Two-Week Moving Average



Source: Vision Insights Data as of May 21, 2025

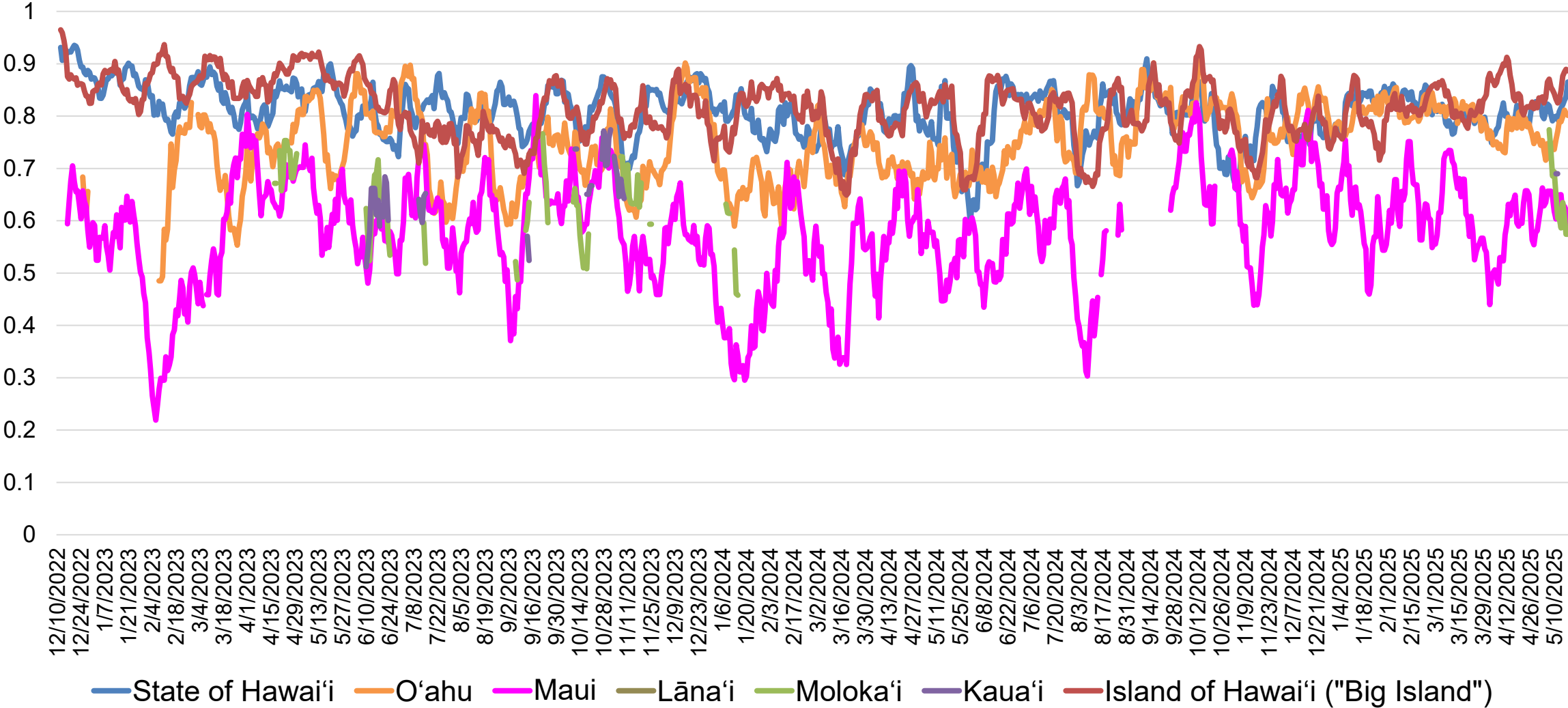
Samples for O'ahu, Maui, Kaua'i, Moloka'i, and Lāna'i are limited

Korea Consideration Two-Week Moving Average



Source: Vision Insights Data as of May 21, 2025
Samples for O'ahu, Maui, Kaua'i, Moloka'i, and Lāna'i are limited

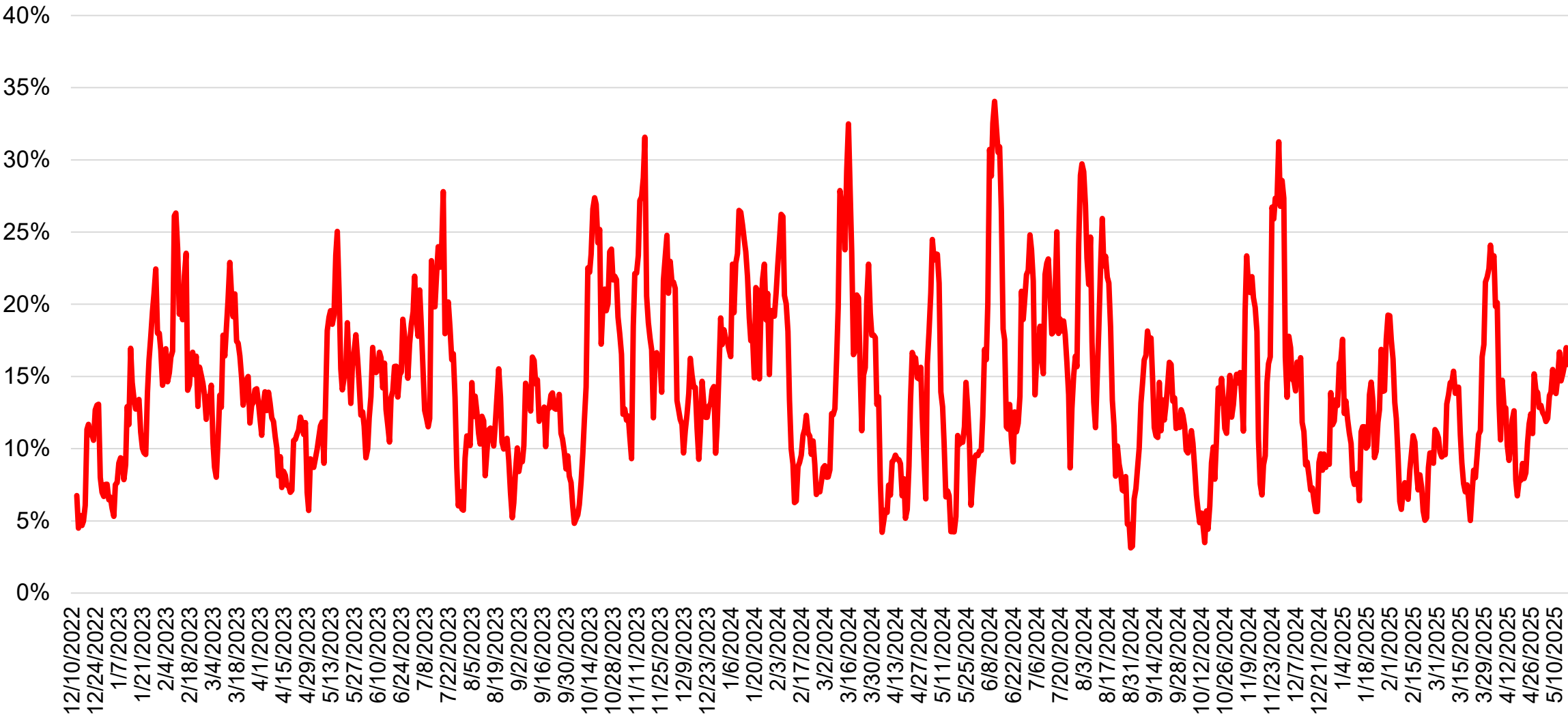
Korea Favorability Two-Week Moving Average



Source: Vision Insights Data as of May 21, 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 May 21, 2025