



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

# **Vision Insights**

# **Destination Brand Health Trends**

March 23, 2026



# 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

# 2025 Significant Dates

**January 7, 2025** – California governor Gavin Newsom proclaimed a state of emergency following the onset of the L.A. fires that same day

**January 20, 2025** – Donald Trump was sworn into office, becoming the 47th president of the United States of America. He signed over 20 executive orders on this day, which included topics relating to border security, gender ideology extremism, and the hiring freeze of federal civilian employees

**March 18, 2025** – Germany's Foreign Office has updated its travel advisory that entry through the Electronic System for Travel Authorization (ESTA) or a U.S. visa is not guaranteed every time and that the final decision rests with the U.S. border control

**March 21, 2025** – Canada and Finland updated their U.S. travel advisory. Canada advised travelers to register their stay if it exceeds 30 days. Finland warned travelers about the U.S.'s two-gender policy and the possibility of entry denial

**March 25, 2025** – The Netherlands has issued a new warning to Dutch citizens considering travel to the United States, especially for LGBTQ+ citizens

**April 18, 2025** – Ireland has updated its U.S. travel advisory to remind travelers about the U.S.'s two-gender policy and advises travelers to always carry immigration documents

**January 13, 2025** – Hawai'i Governor Josh Green announces the "Aloha for LA" program that would offer free flights and reduced hotel rates for first responders and those who lost their homes to the L.A. fires

**March 14, 2025** – The United Kingdom has revised its travel advice for British citizens planning to visit the United States, warning of potential arrest or detention if travelers violate the strict entry rules

**March 20, 2025** – The Ministry of Foreign Affairs of Denmark advised transgender and nonbinary citizens to contact the U.S. embassy before visiting due to President Trump's two-gender policy

**March 24, 2025** – The French foreign ministry has modified its travel advisory to include information about the change in the U.S.'s gender policy

**April 09, 2025** – The tourism ministry of China has issued a new advisory about the U.S. to Chinese travelers due to the deterioration of trade relations between the United States and China

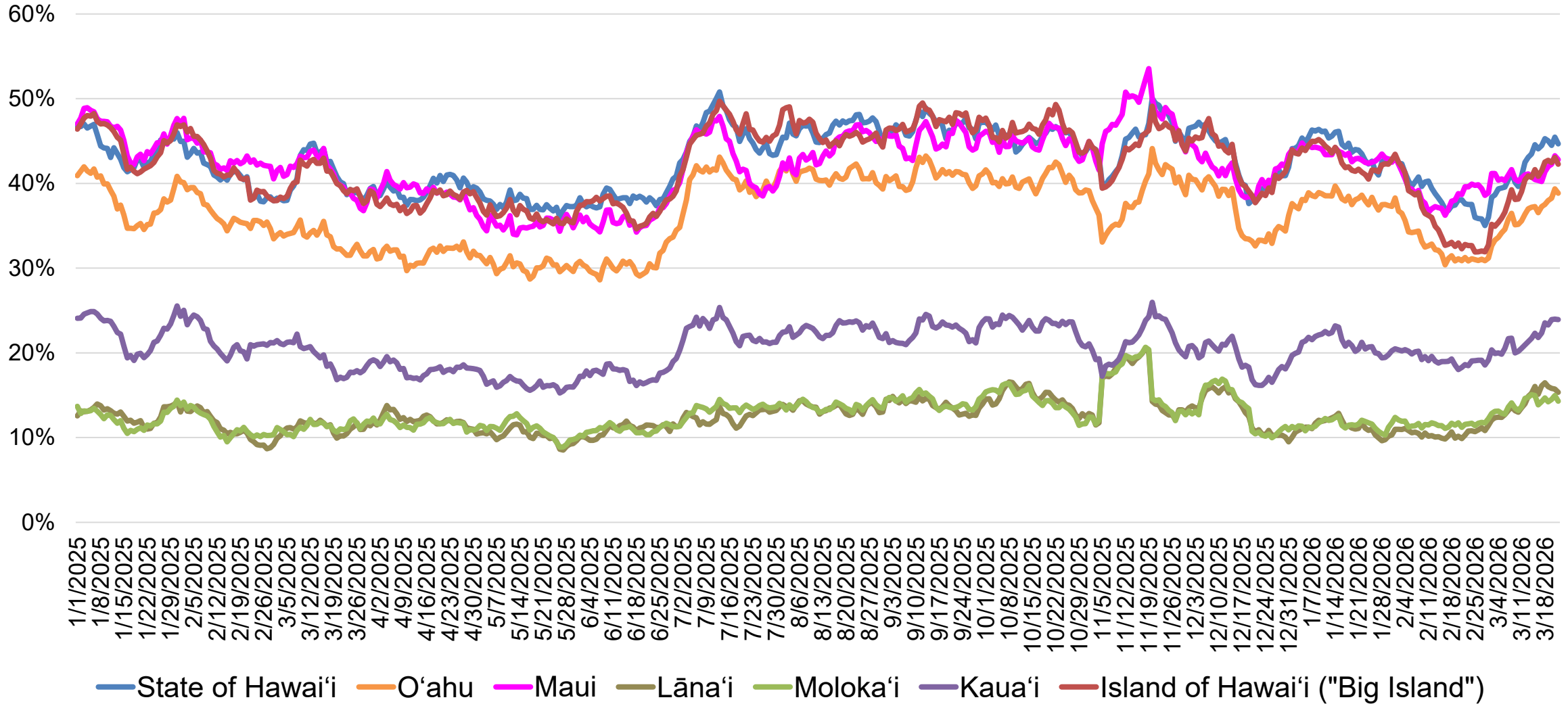


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# United States Destination Brand Health Trends

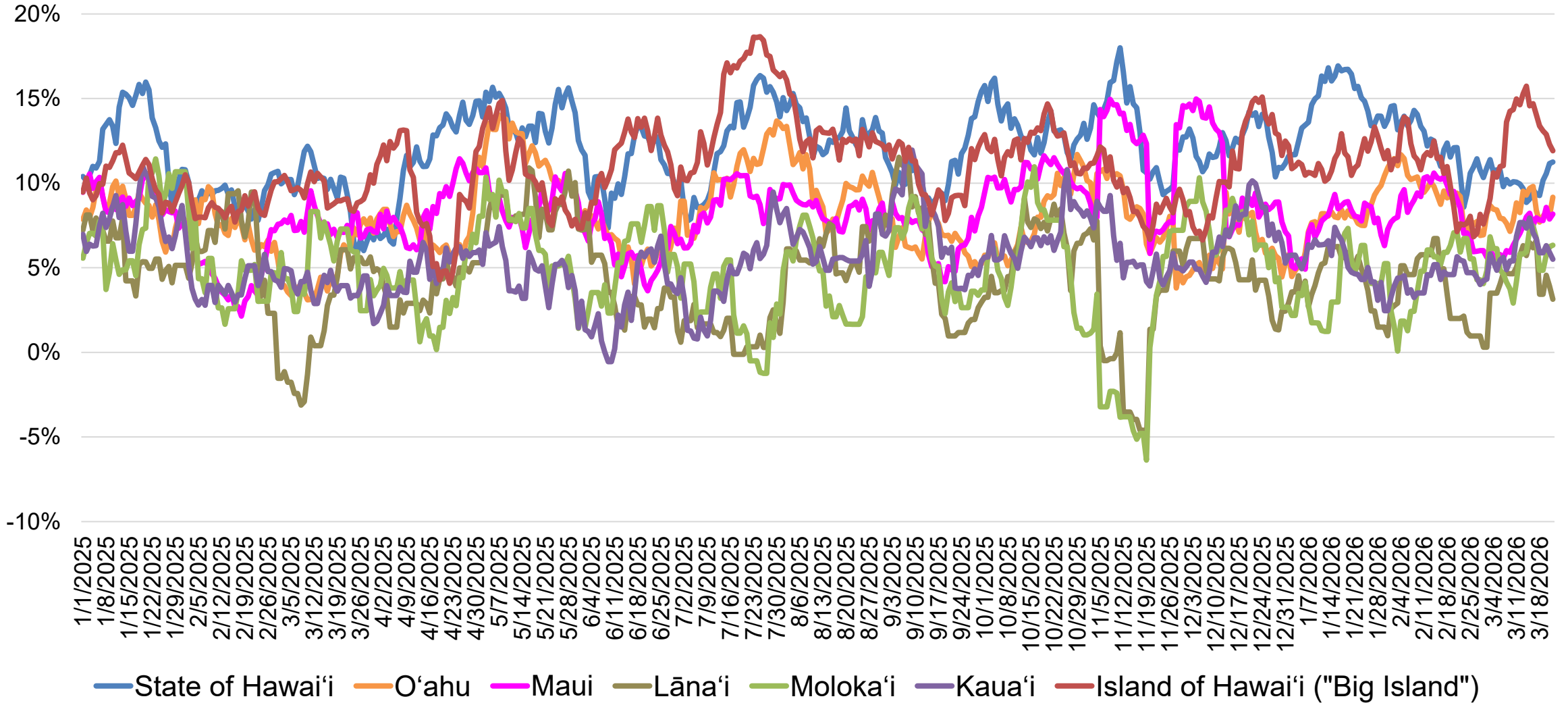


# U.S. Destination Awareness Two-Week Moving Average



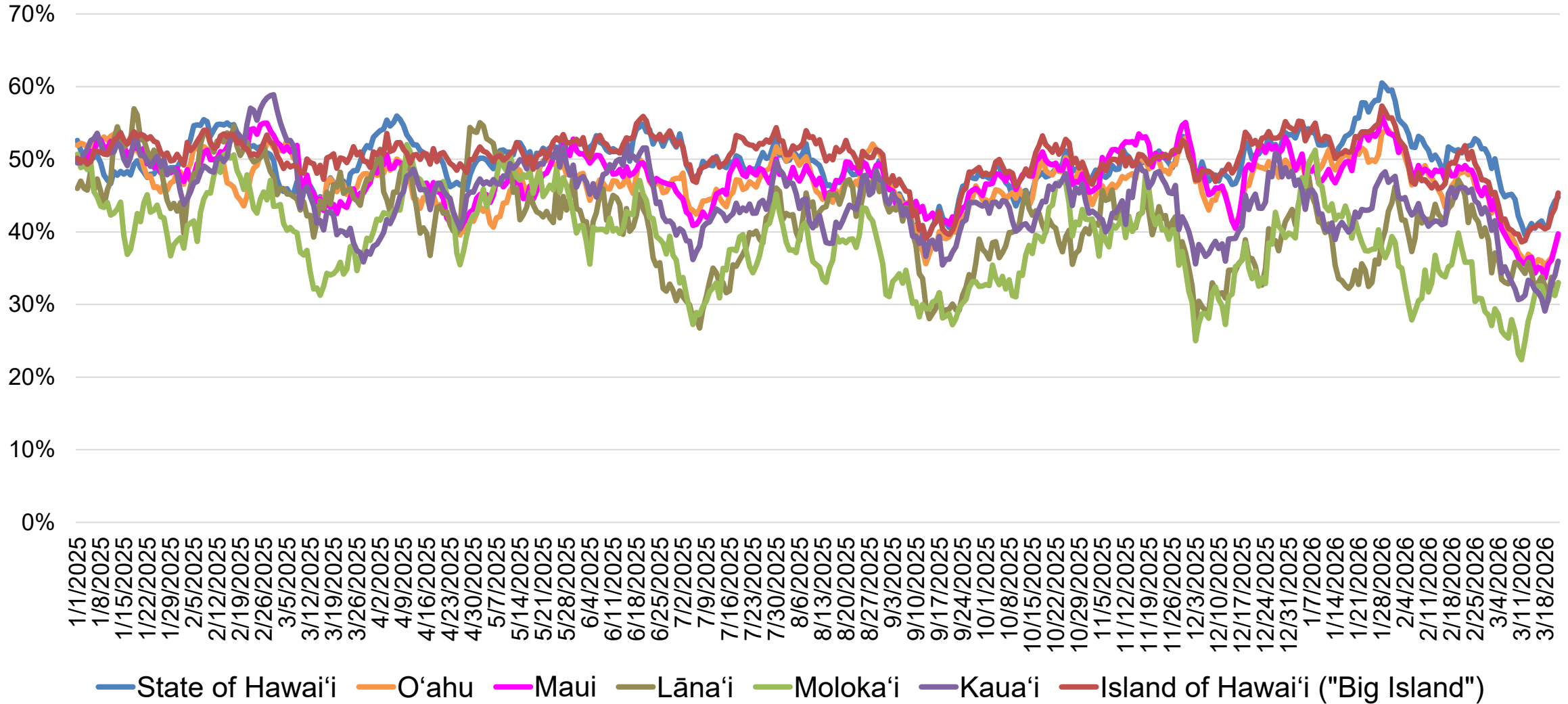
Source: Vision Insights Data as of March 23, 2026

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



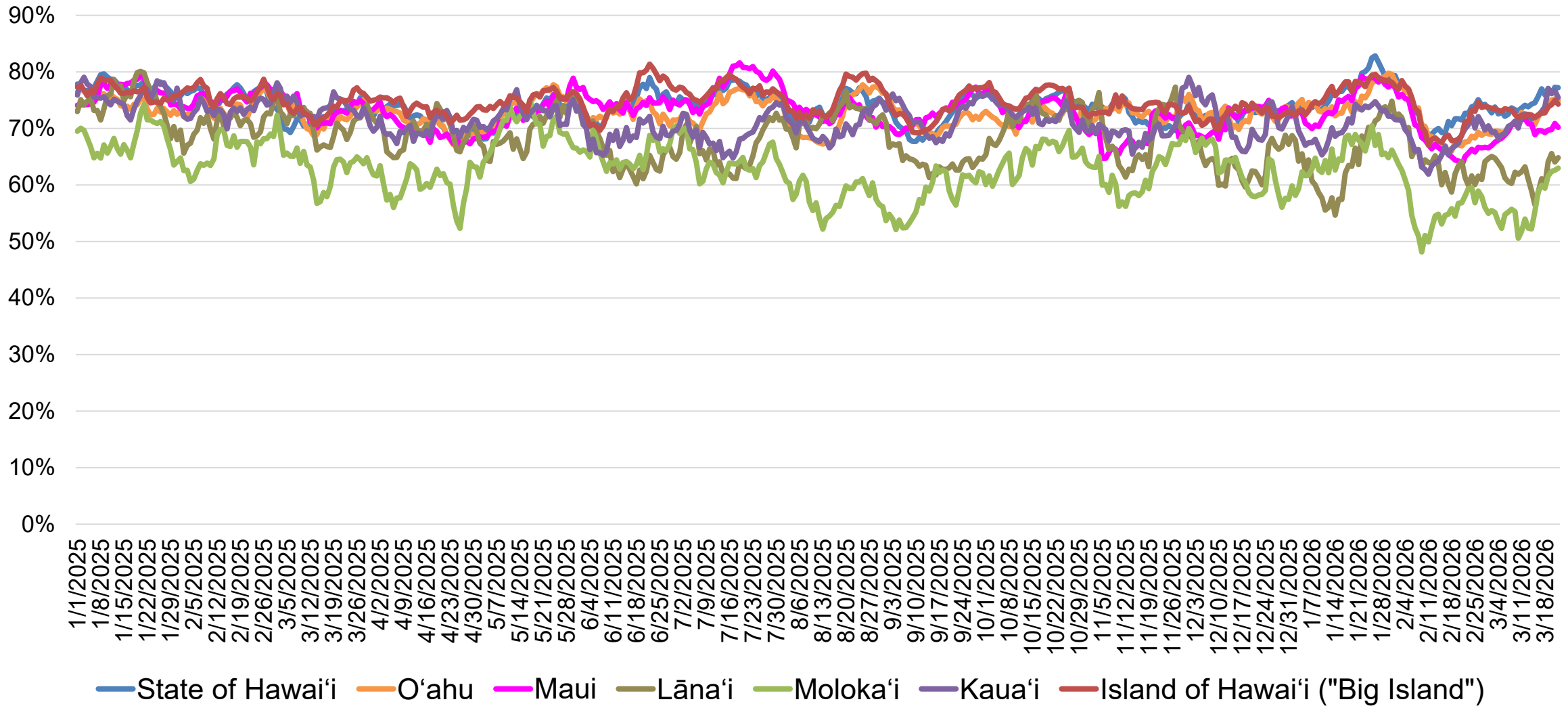
Source: Vision Insights Data as of March 23, 2026

# U.S. Consideration Two-Week Moving Average



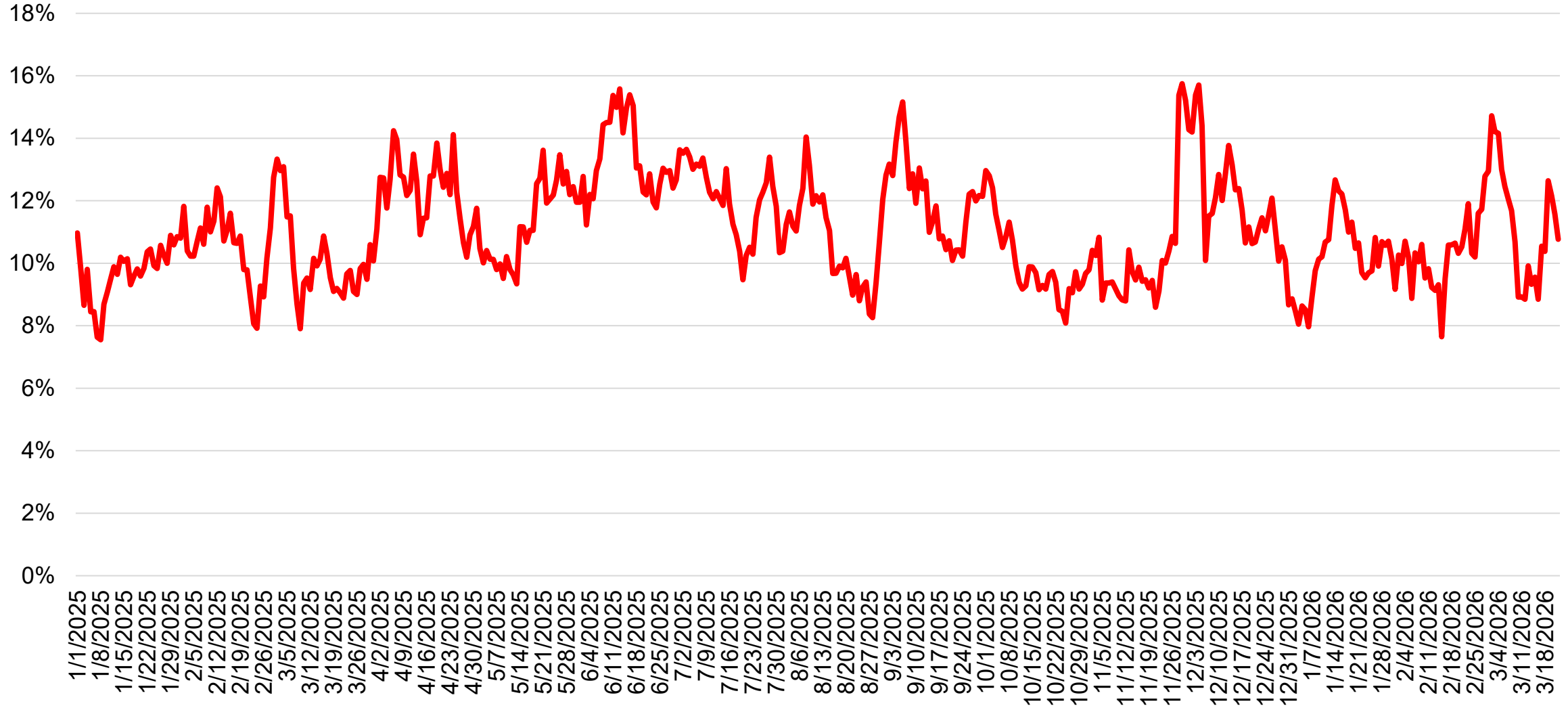
Source: Vision Insights Data as of March 23, 2026

# U.S. Favorability Two-Week Moving Average



Source: Vision Insights Data as of March 23, 2026

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



Source: Vision Insights Data as of March 23, 2026

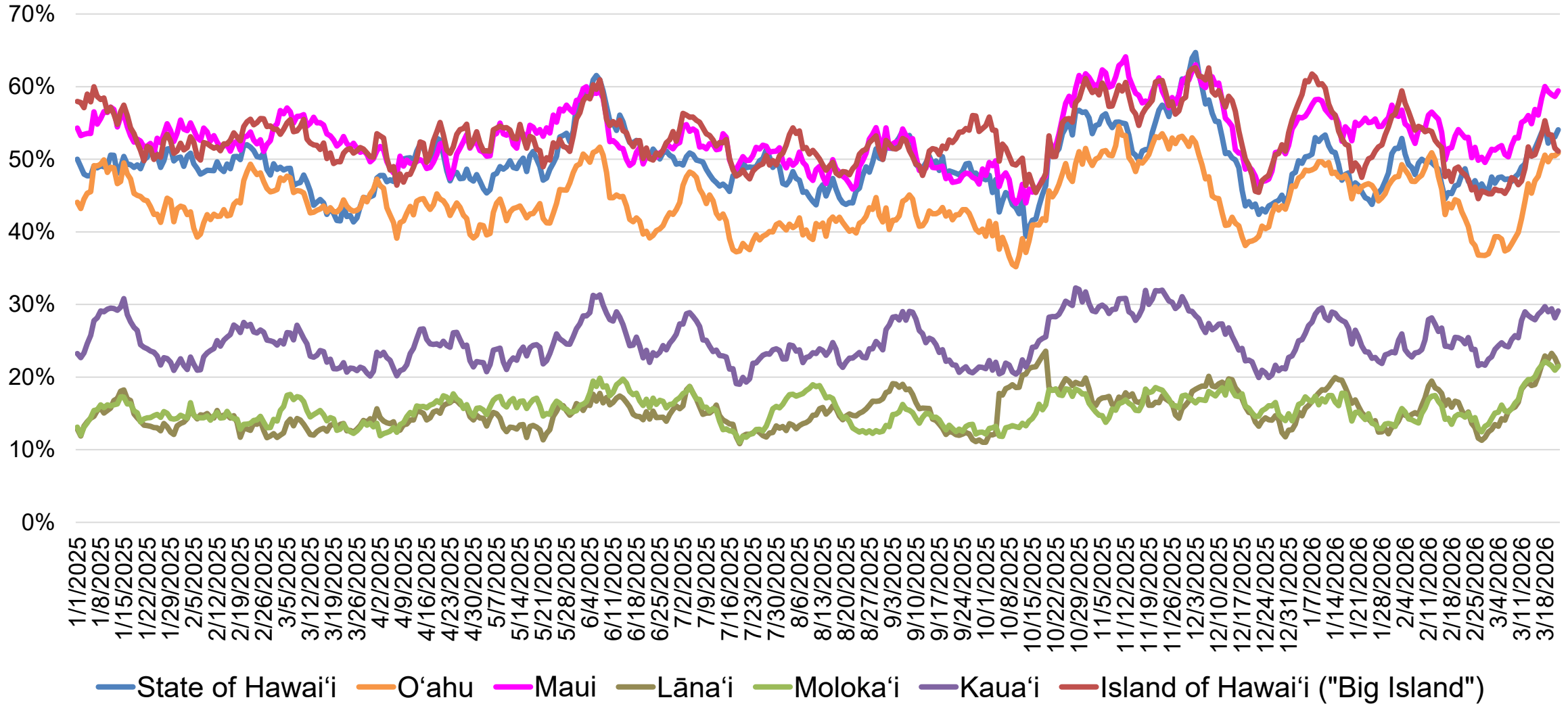


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# Canada Destination Brand Health Trends

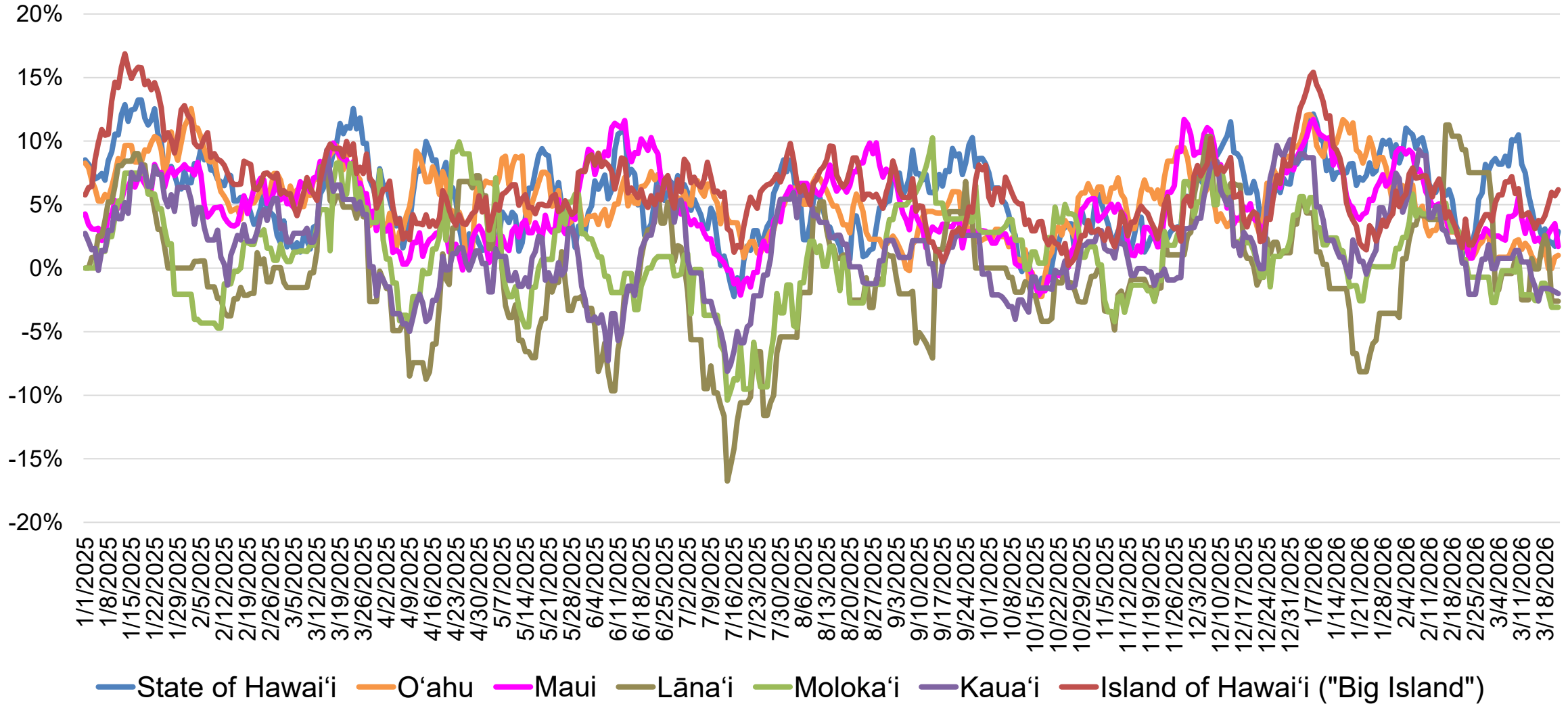


# Canada Destination Awareness Two-Week Moving Average



Source: Vision Insights Data as of March 23, 2026

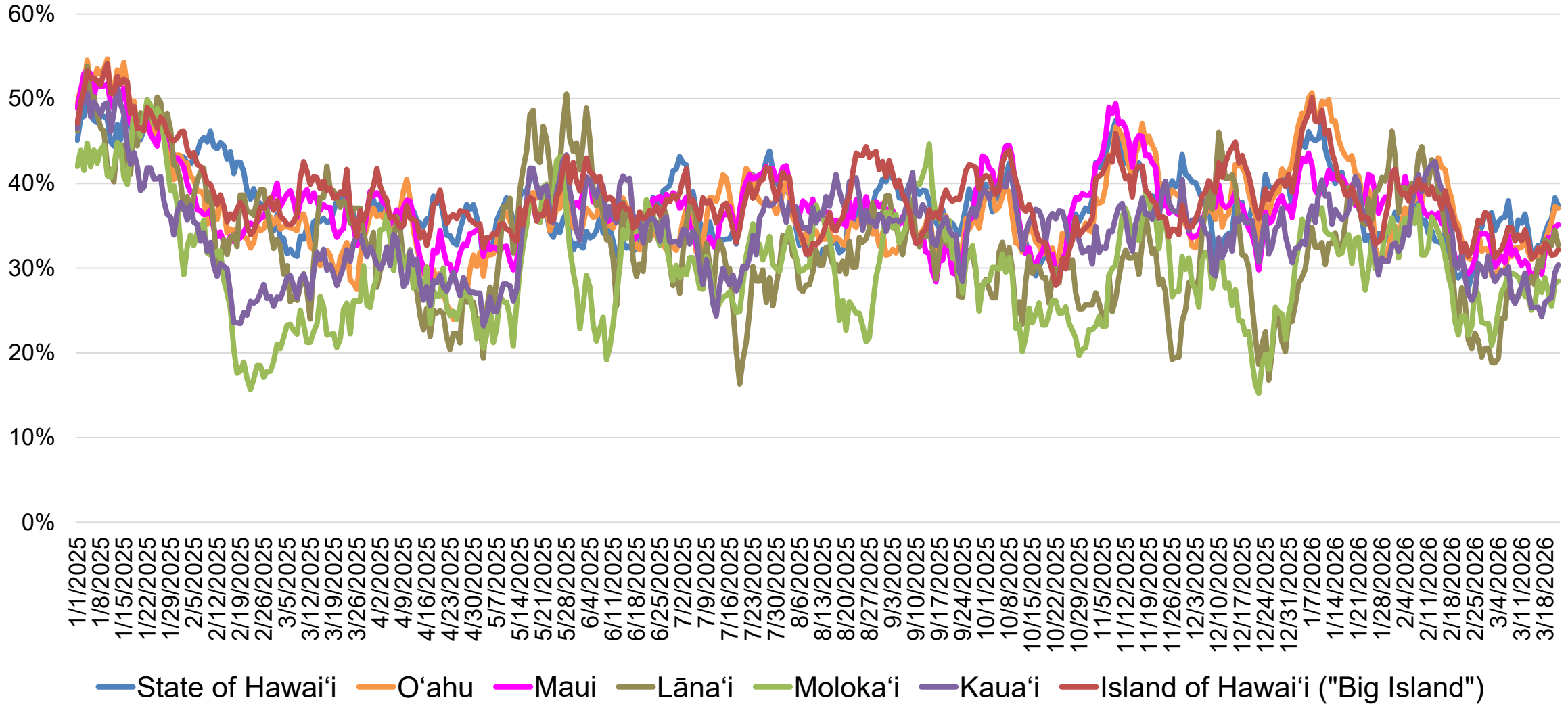
# Canada Chatter (Net) Two-Week Moving Average



Source: Vision Insights Data as of March 23, 2026

Samples for Lāna'i are limited

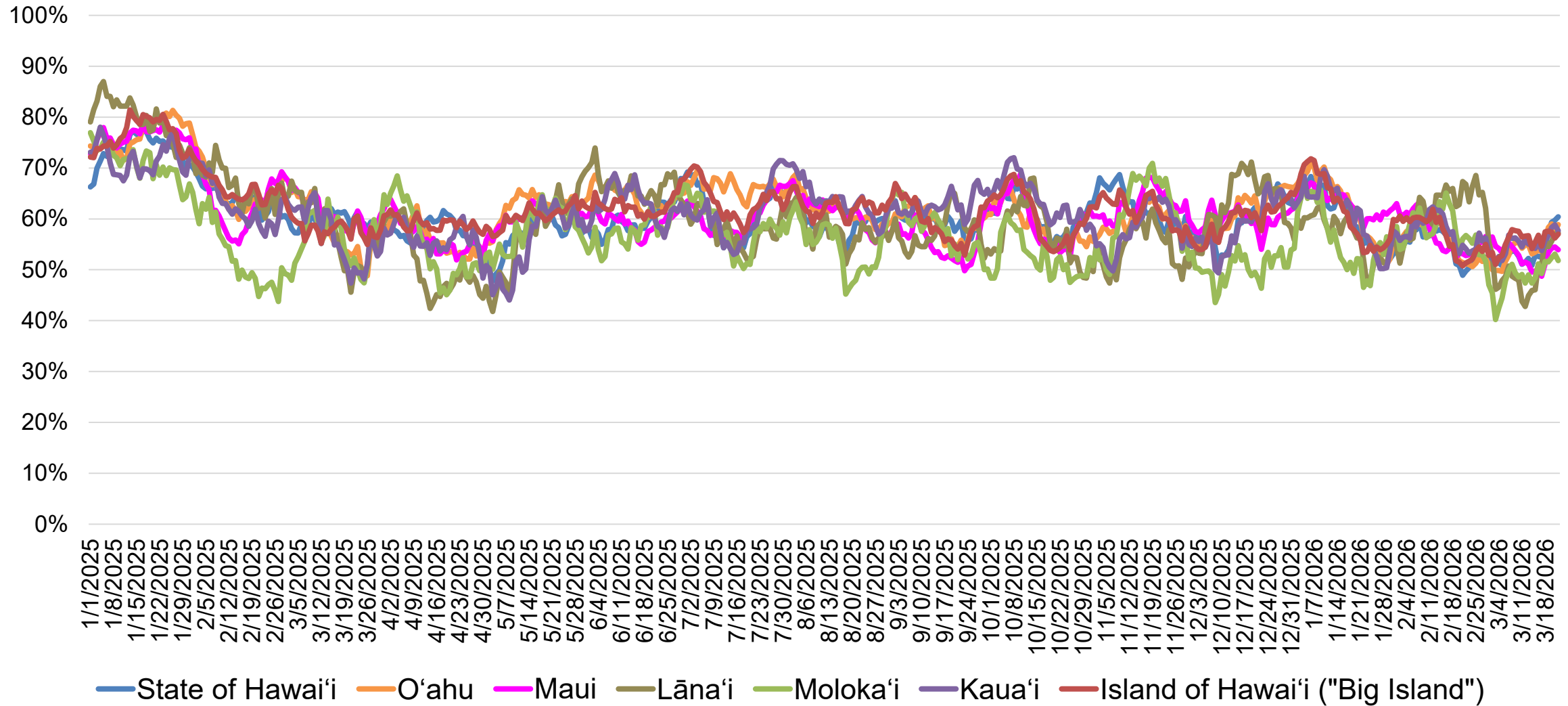
# Canada Consideration Two-Week Moving Average



Source: Vision Insights Data as of March 23, 2026

Samples for Lāna'i are limited

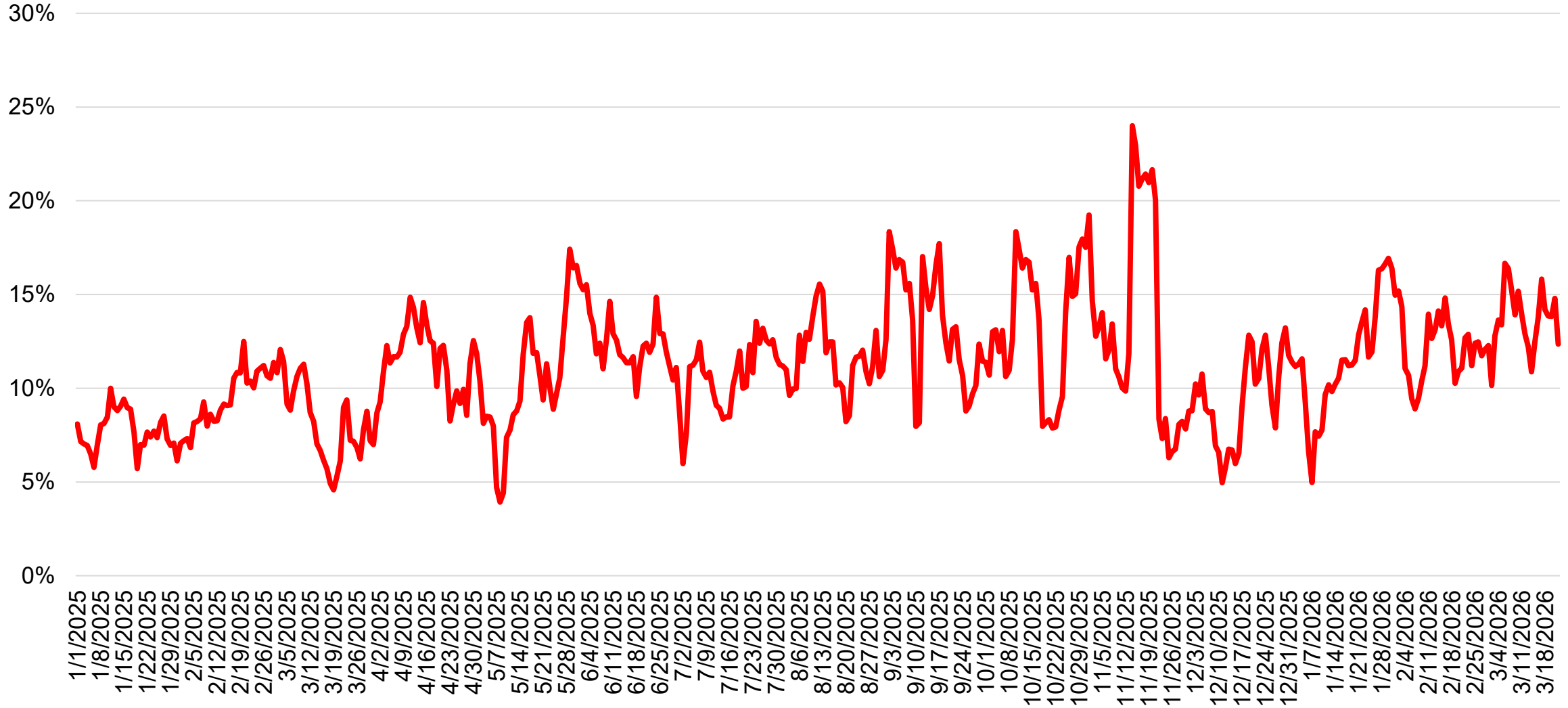
# Canada Favorability Two-Week Moving Average



Source: Vision Insights Data as of March 23, 2026

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 23, 2026

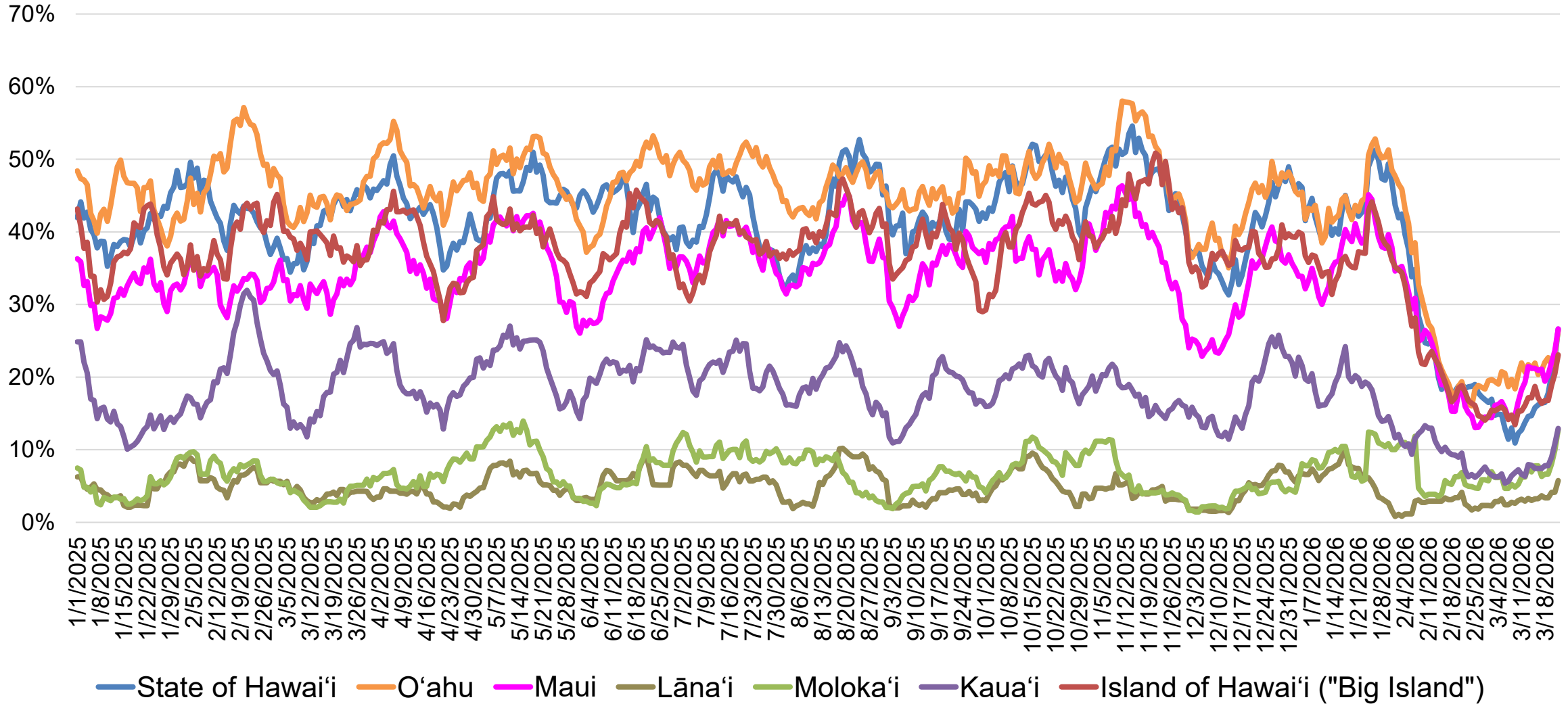


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# Japan Destination Brand Health Trends

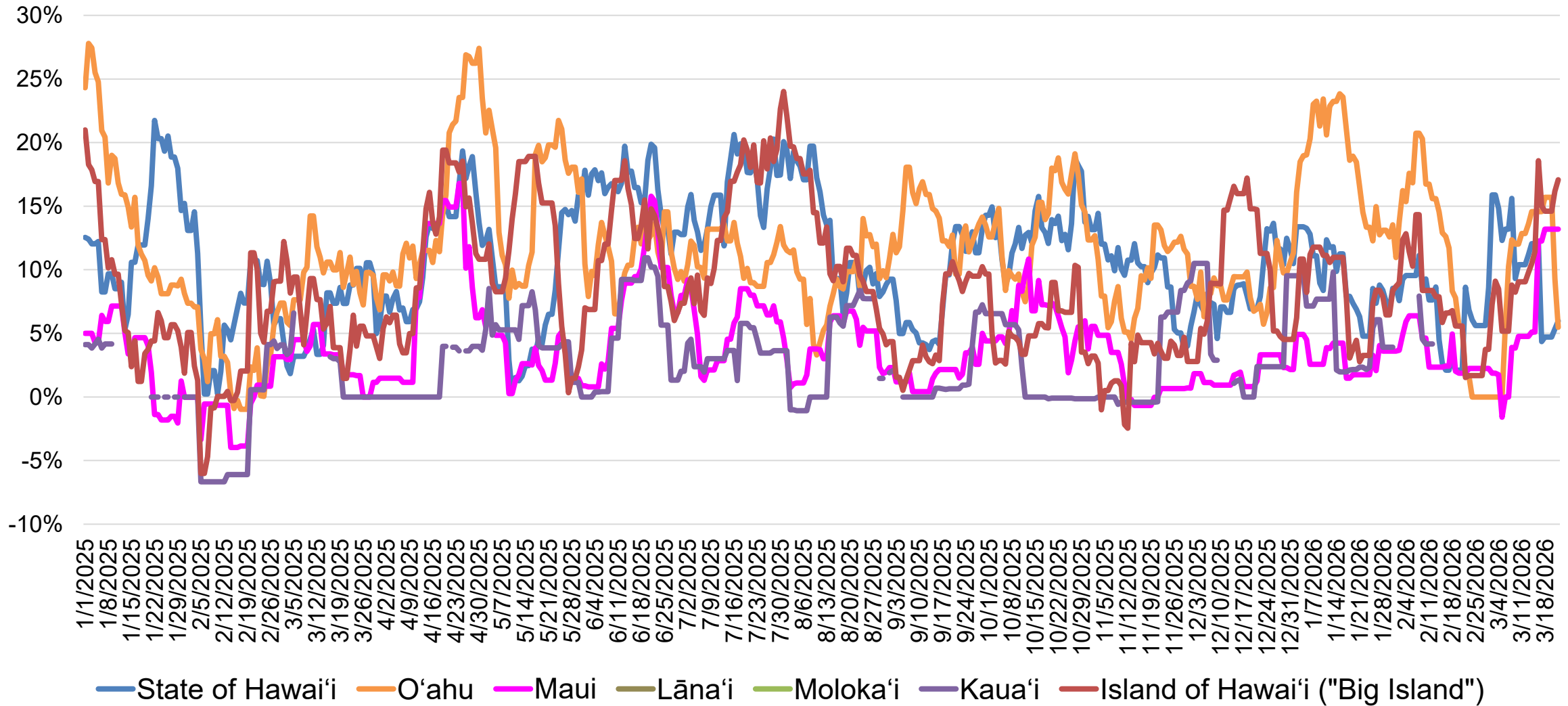


# Japan Destination Awareness Two-Week Moving Average



Source: Vision Insights Data as of March 23, 2026

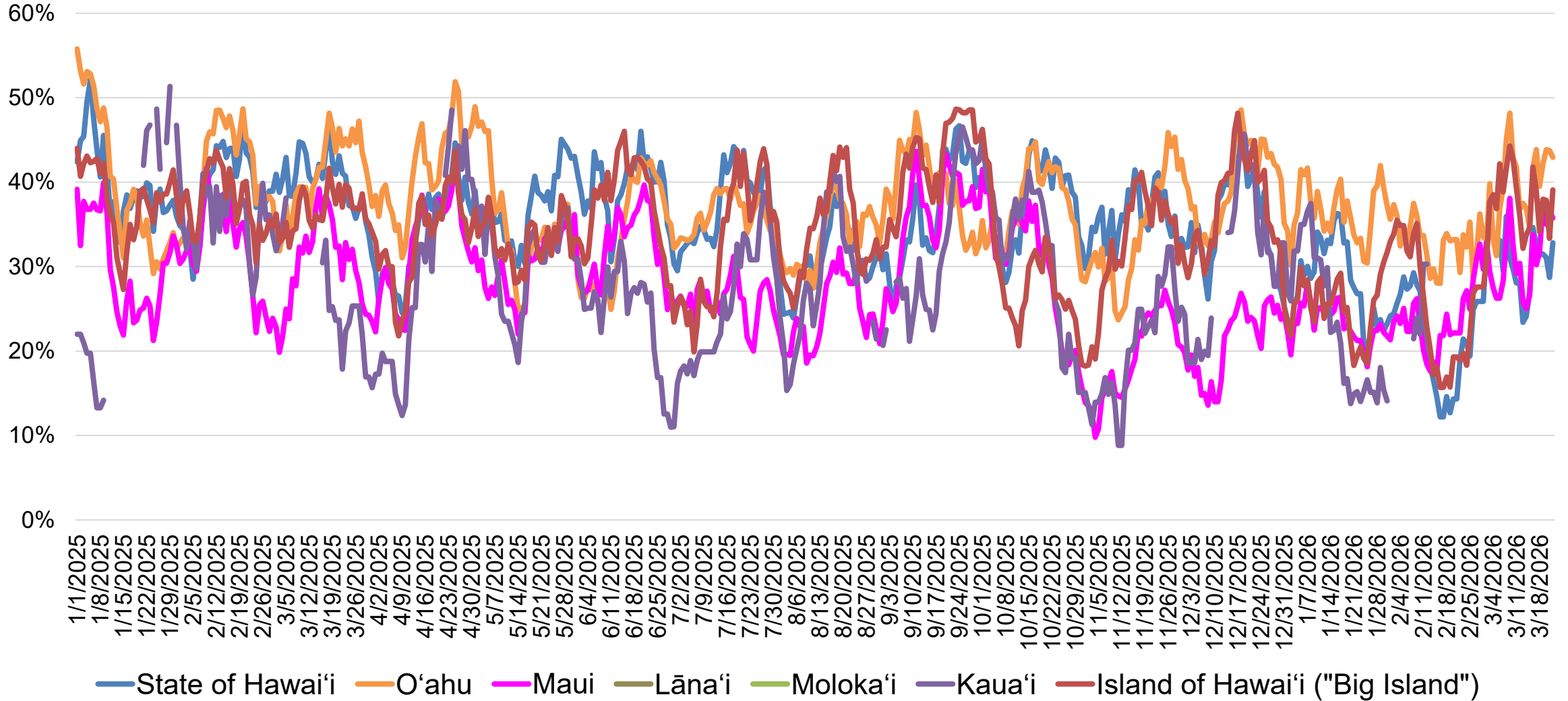
# Japan Chatter (Net) Two-Week Moving Average



Source: Vision Insights Data as of March 23, 2026

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

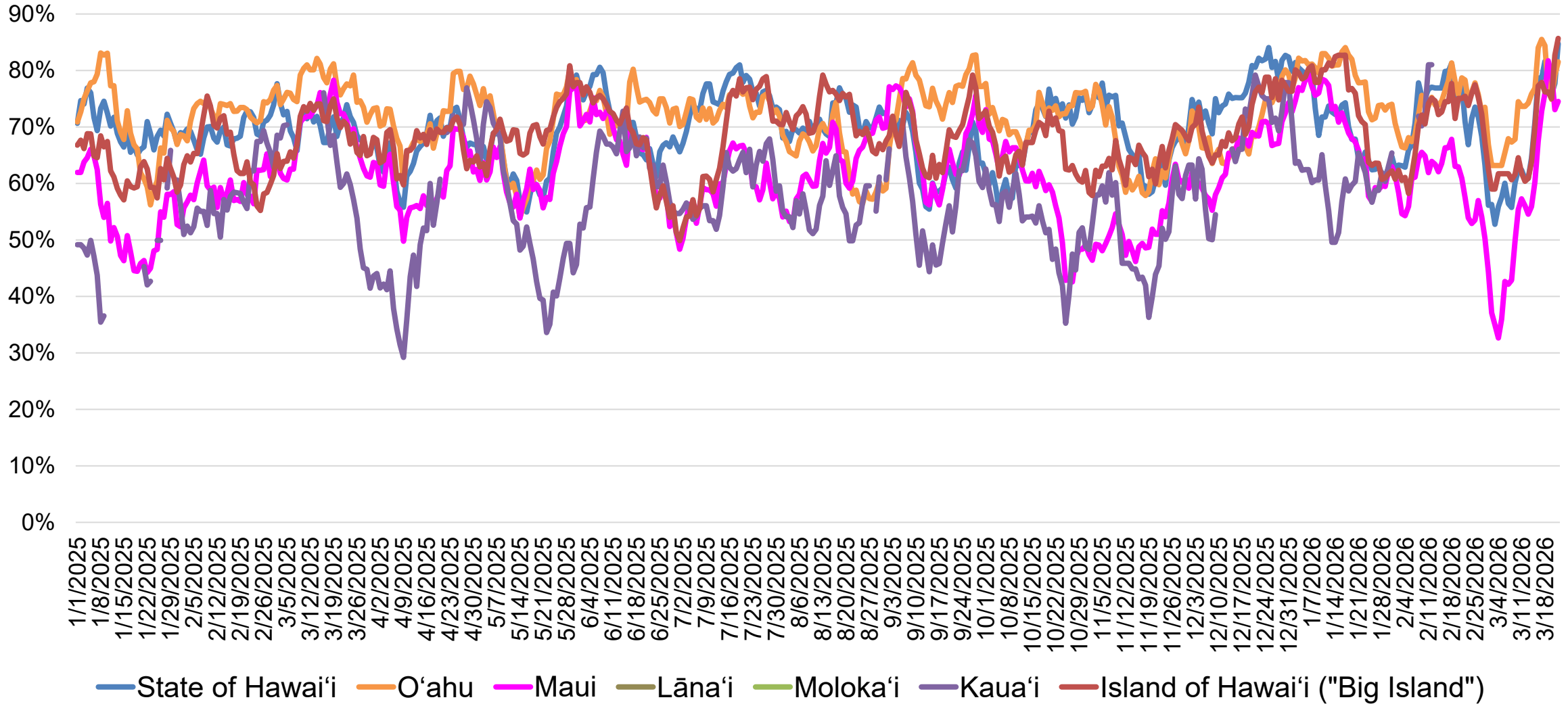
# Japan Consideration Two-Week Moving Average



Source: Vision Insights Data as of March 23, 2026

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

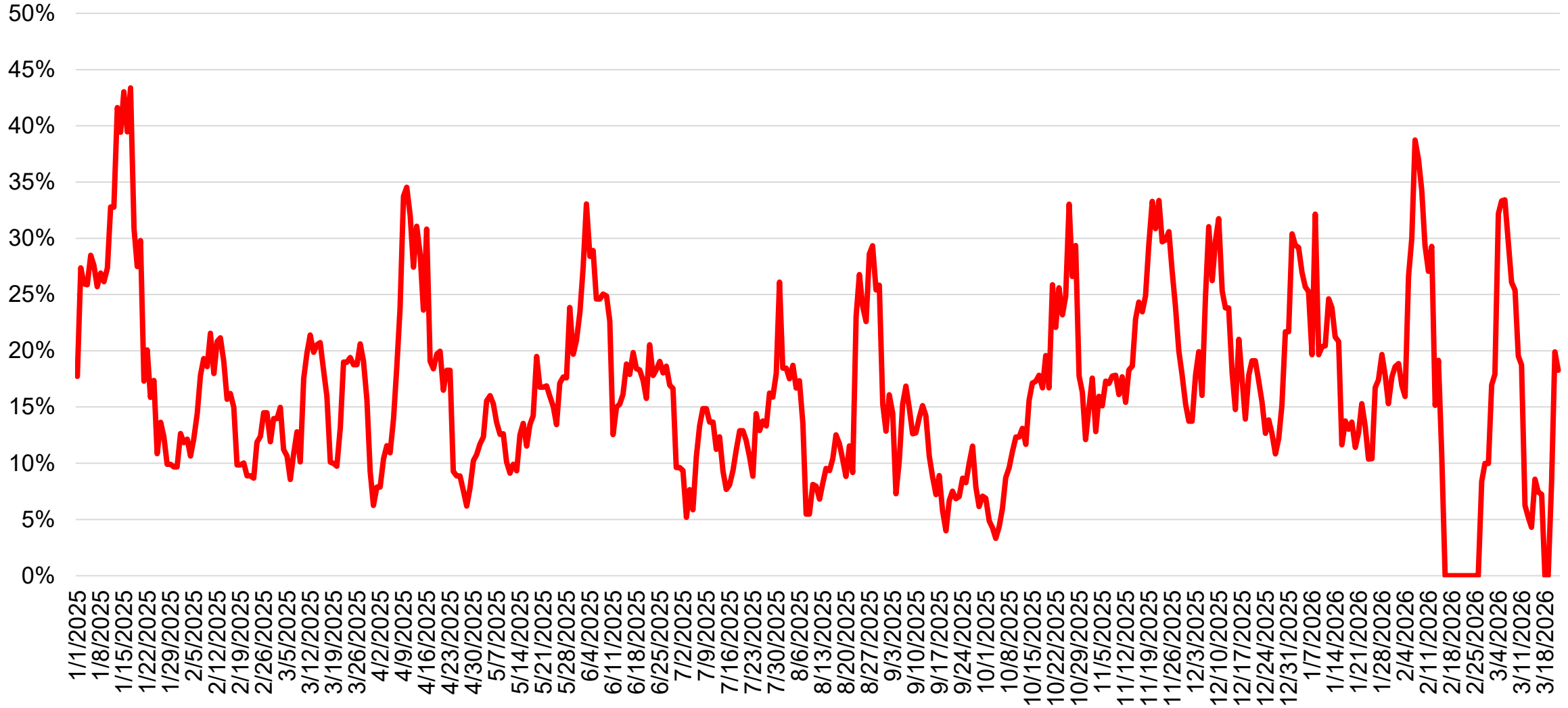
# Japan Favorability Two-Week Moving Average



Source: Vision Insights Data as of March 23, 2026

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 23, 2026

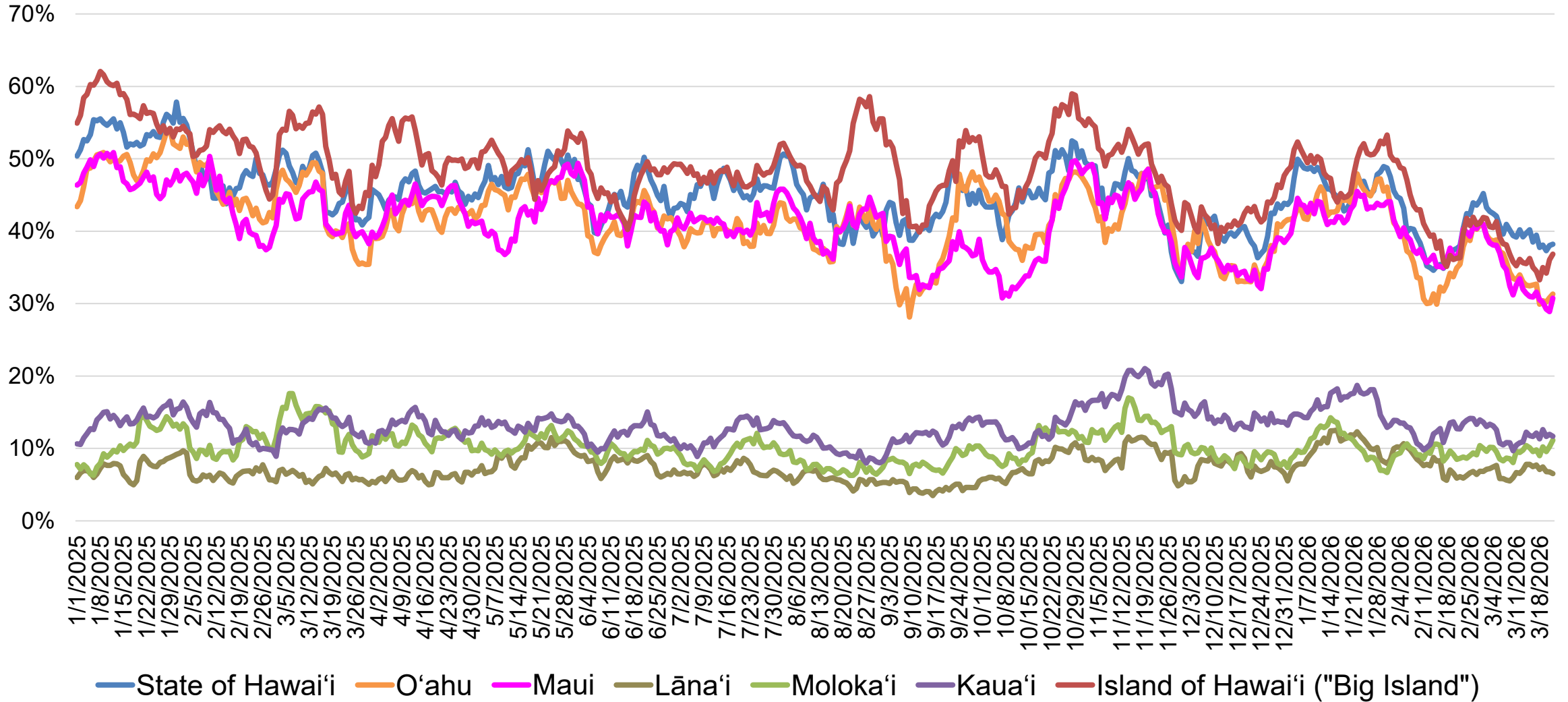


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# Australia Destination Brand Health Trends

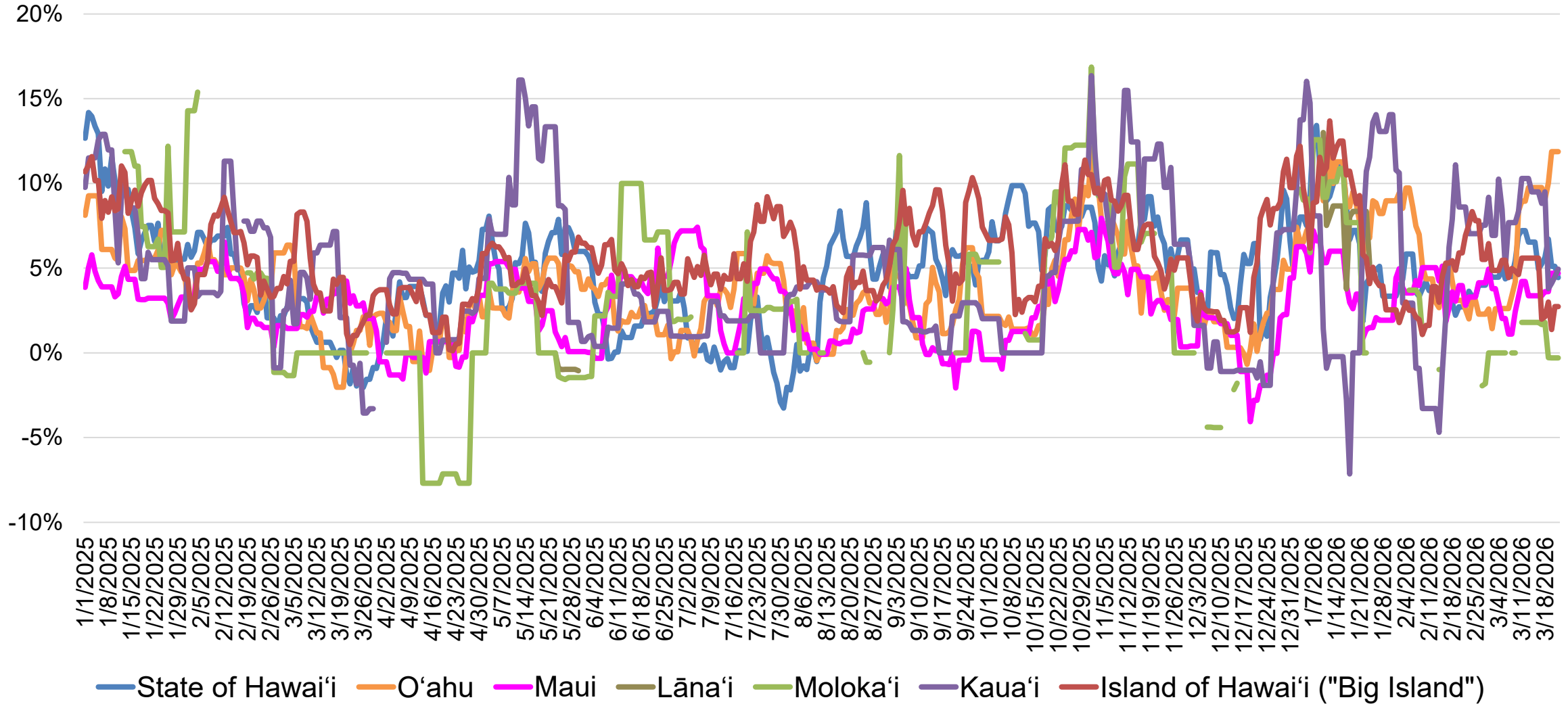


# Australia Destination Awareness Two-Week Moving Average



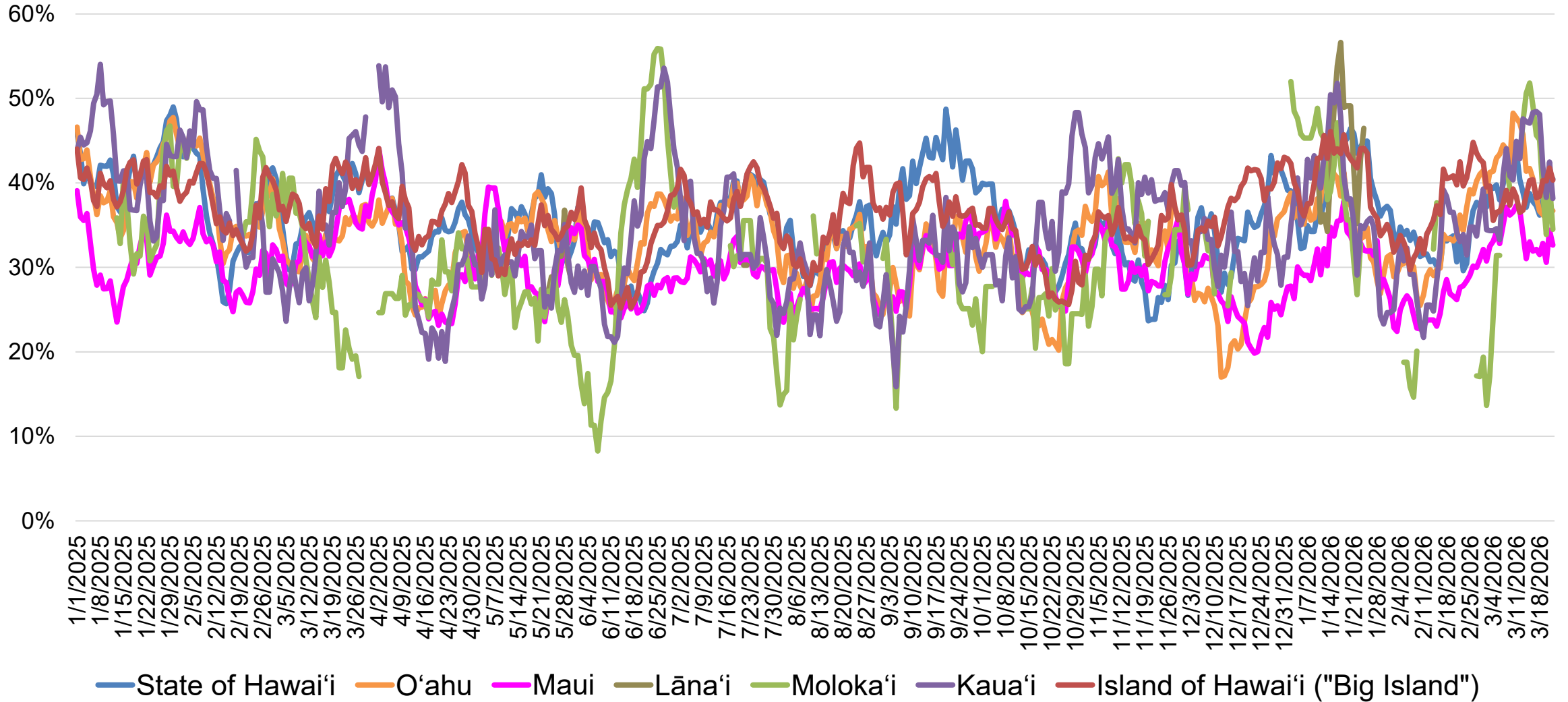
Source: Vision Insights Data as of March 23, 2026

# Australia Chatter (Net) Two-Week Moving Average



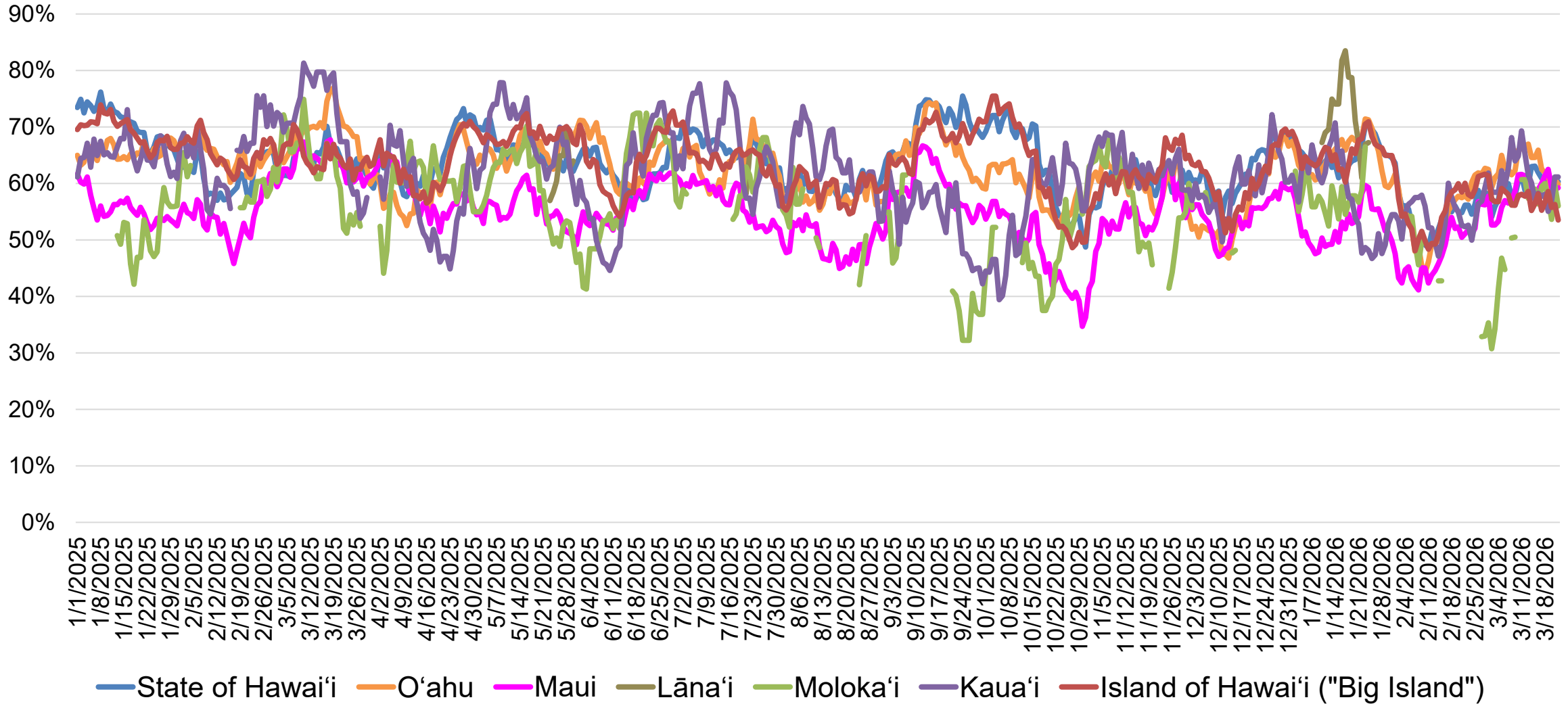
Source: Vision Insights Data as of March 23, 2026  
Samples for Kaua'i, Moloka'i, and Lāna'i are limited

# Australia Consideration Two-Week Moving Average



Source: Vision Insights Data as of March 23, 2026  
Samples for Kaua'i, Moloka'i, and Lāna'i are limited

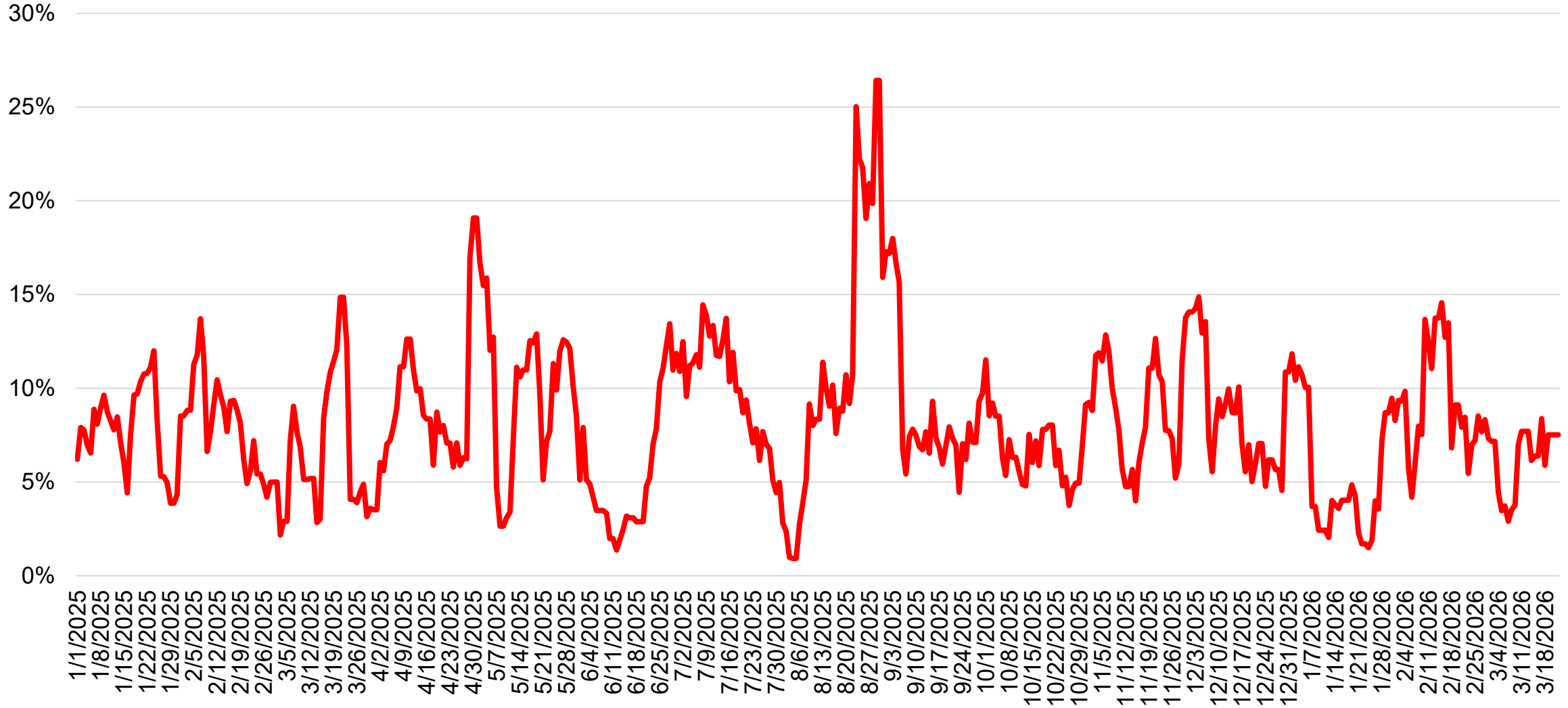
# Australia Favorability Two-Week Moving Average



Source: Vision Insights Data as of March 23, 2026  
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 23, 2026



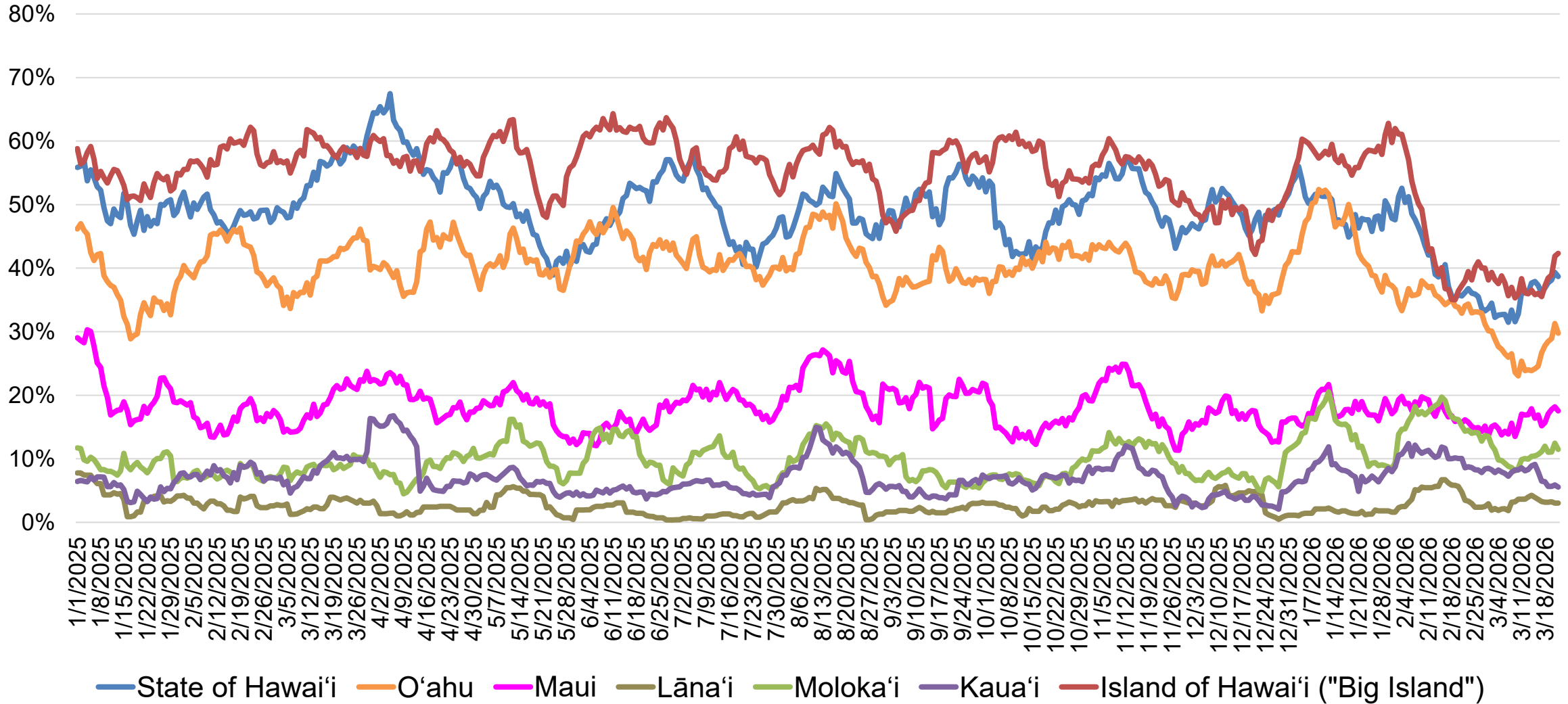
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# **Korea**

# **Destination Brand Health Trends**

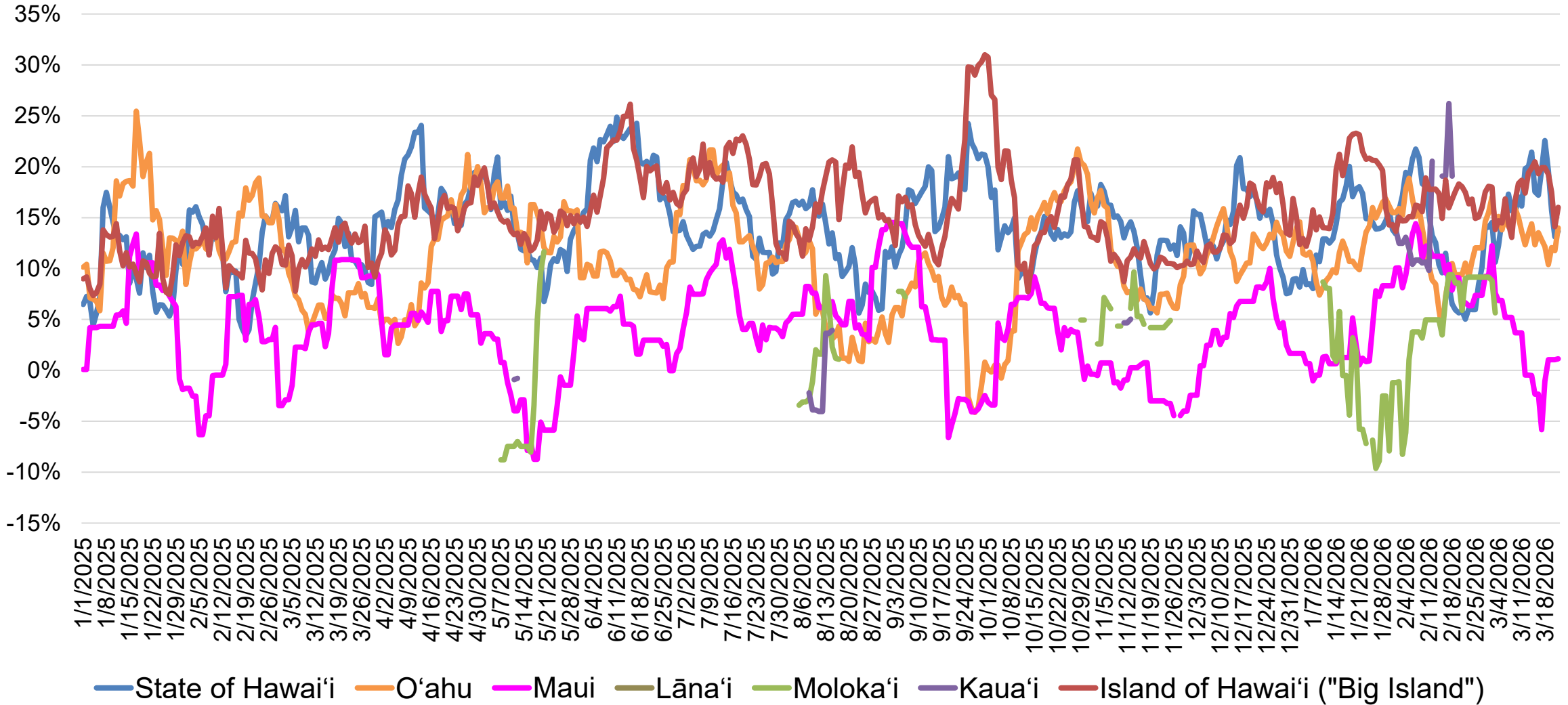


# Korea Destination Awareness Two-Week Moving Average



Source: Vision Insights Data as of March 23, 2026

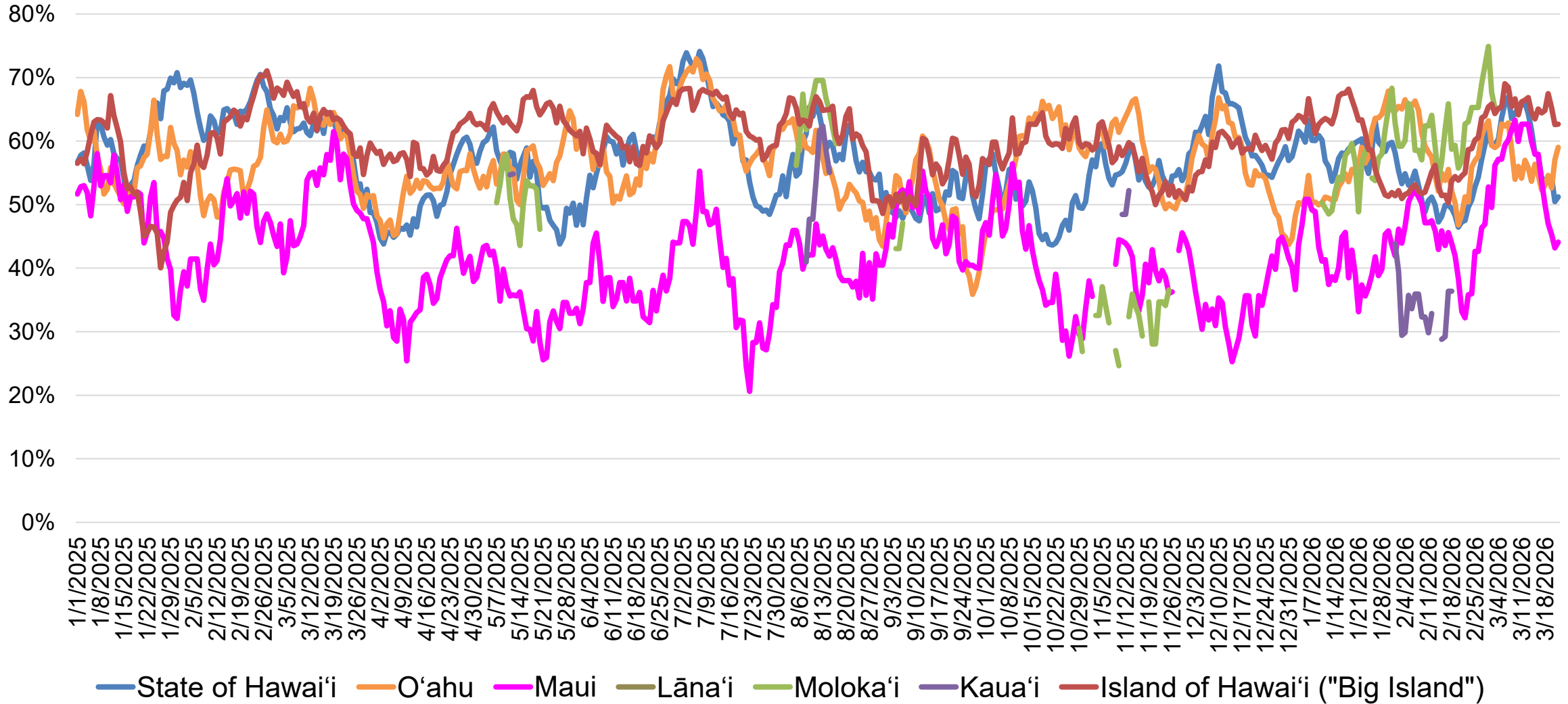
# Korea Chatter (Net) Two-Week Moving Average



Source: Vision Insights Data as of March 23, 2026

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 23, 2026

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

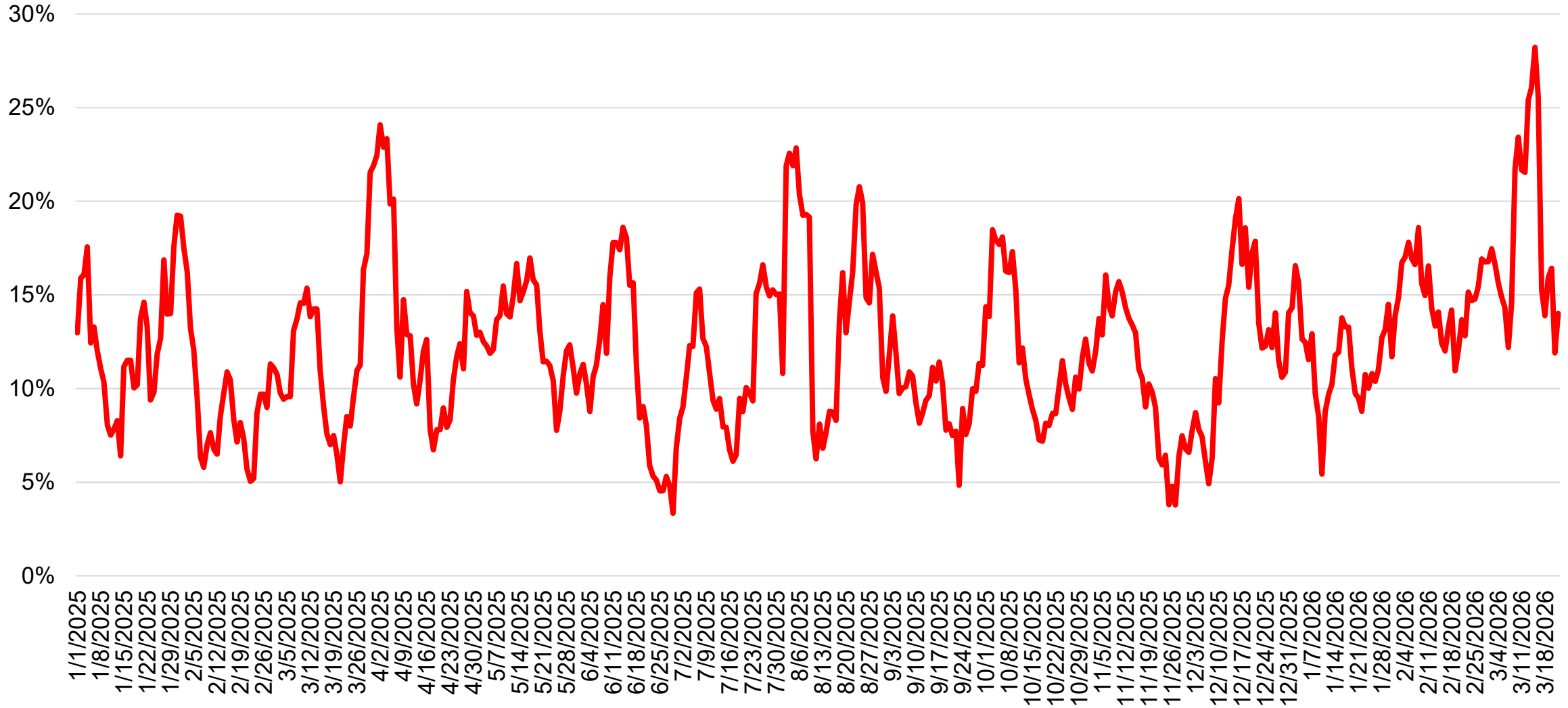
# Korea Favorability Two-Week Moving Average



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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 March 23, 2026