



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

Vision Insights

Destination Brand Health Trends

March 30, 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

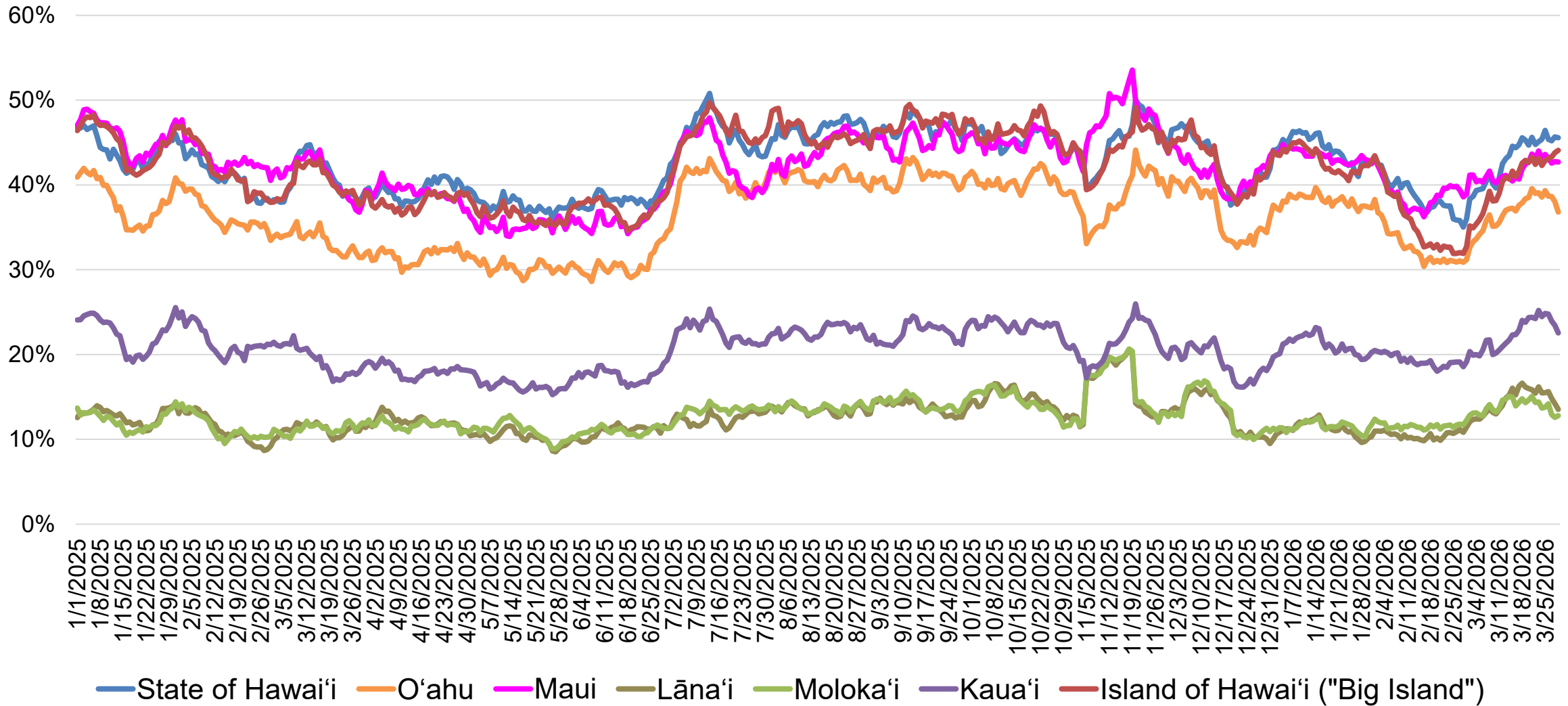


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United States Destination Brand Health Trends

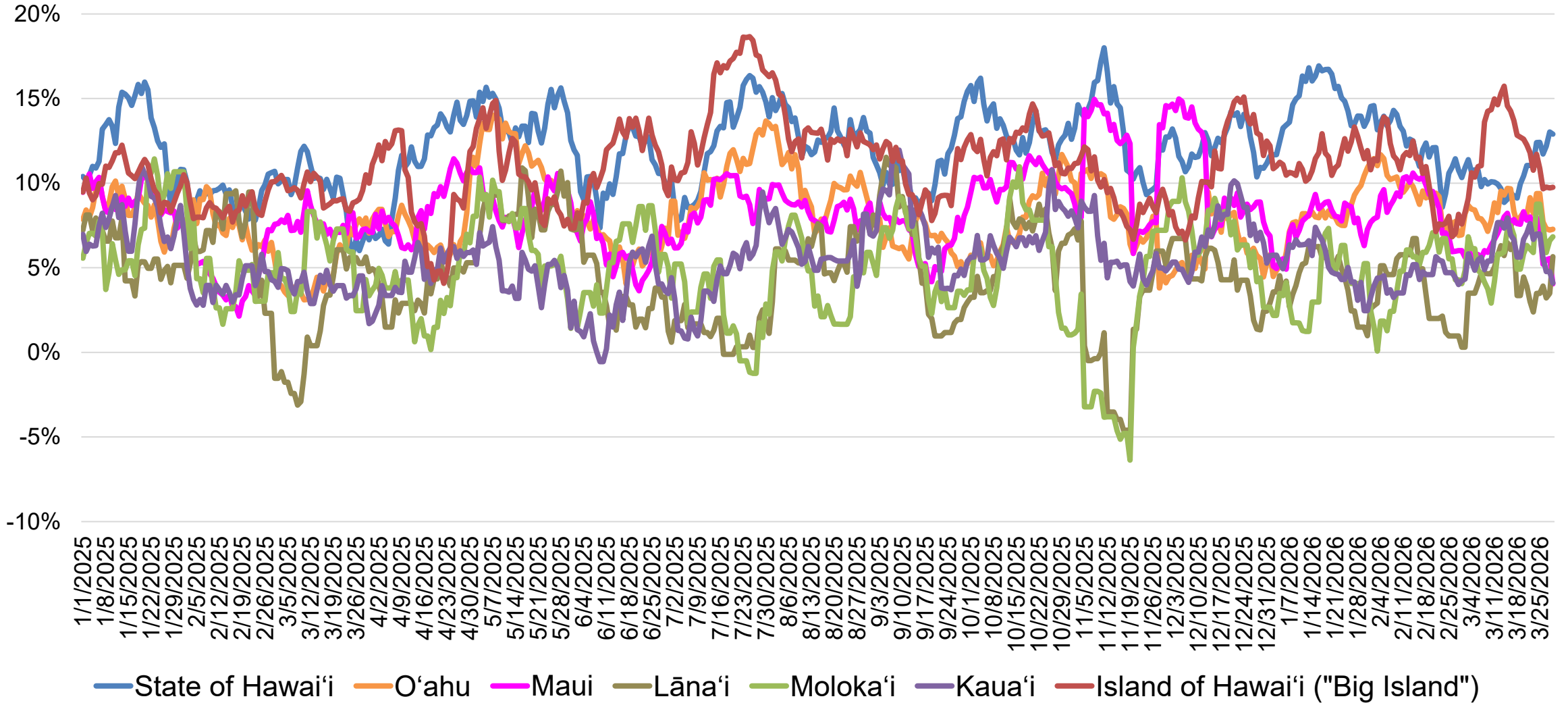


U.S. Destination Awareness Two-Week Moving Average



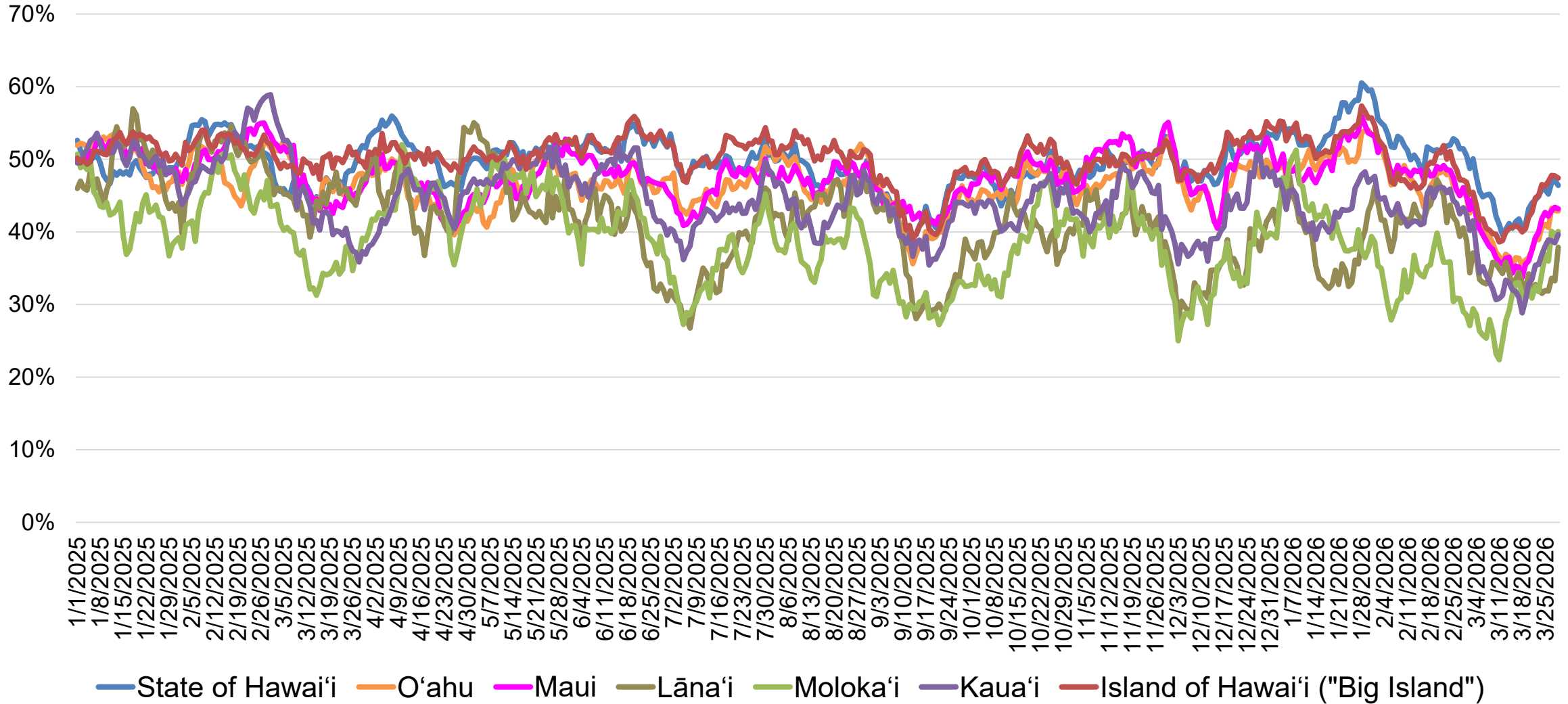
Source: Vision Insights Data as of March 30, 2026

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



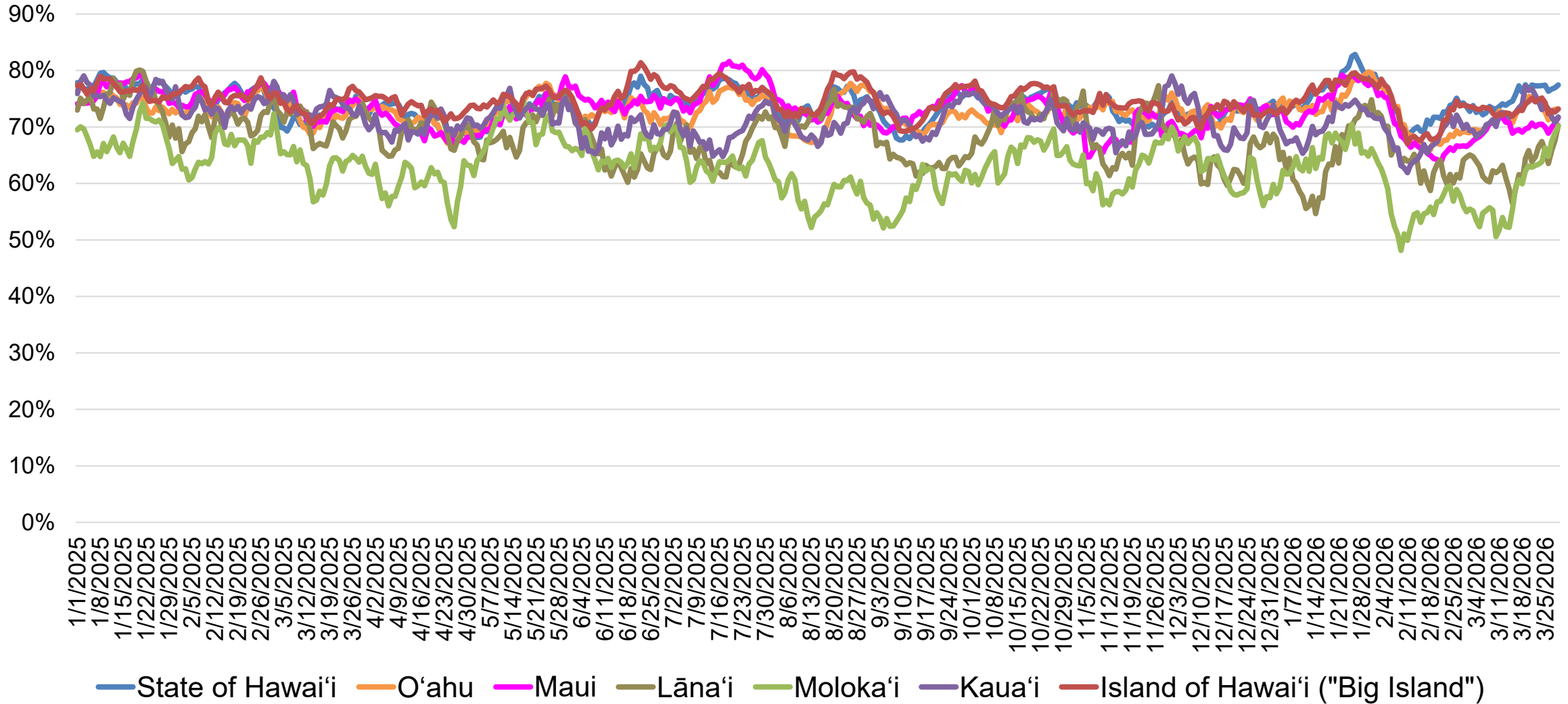
Source: Vision Insights Data as of March 30, 2026

U.S. Consideration Two-Week Moving Average



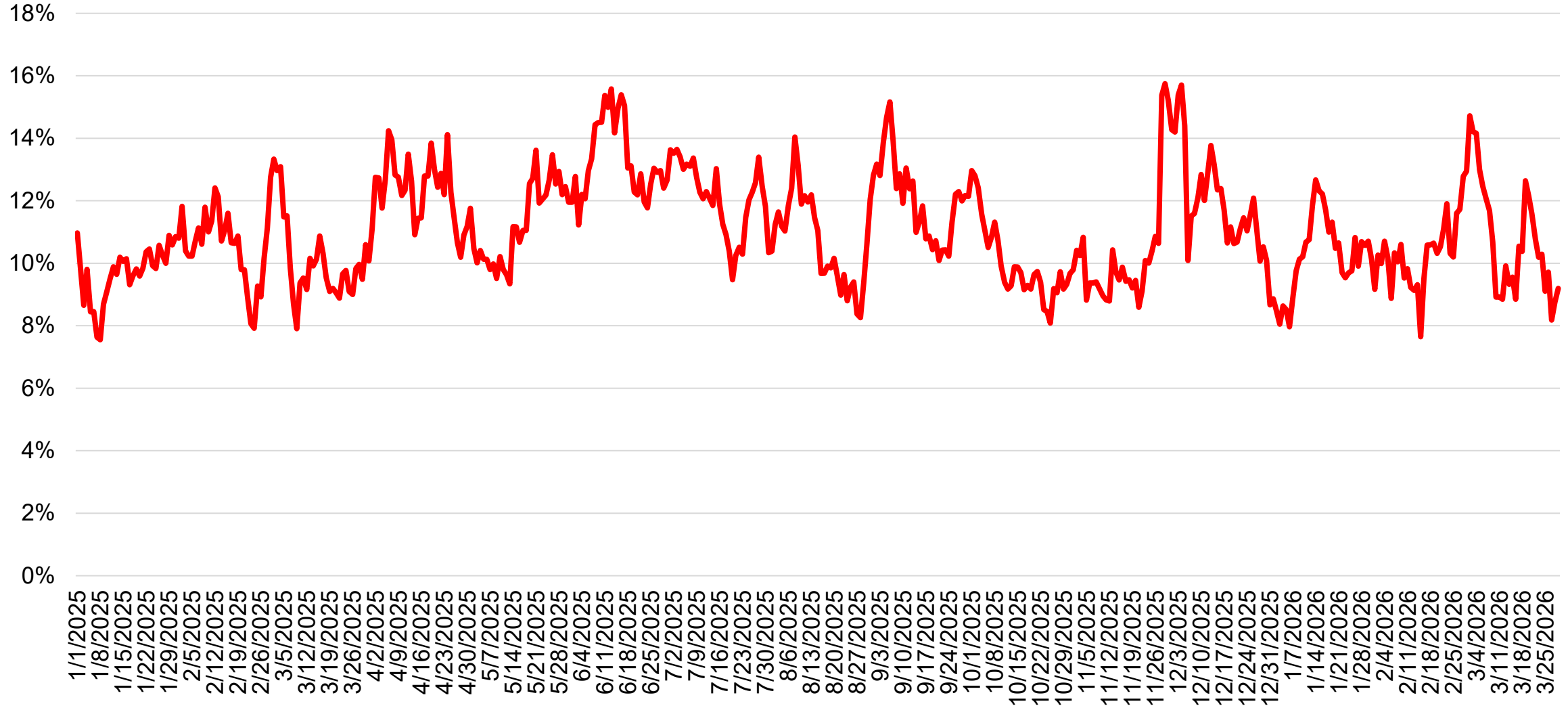
Source: Vision Insights Data as of March 30, 2026

U.S. Favorability Two-Week Moving Average



Source: Vision Insights Data as of March 30, 2026

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



Source: Vision Insights Data as of March 30, 2026

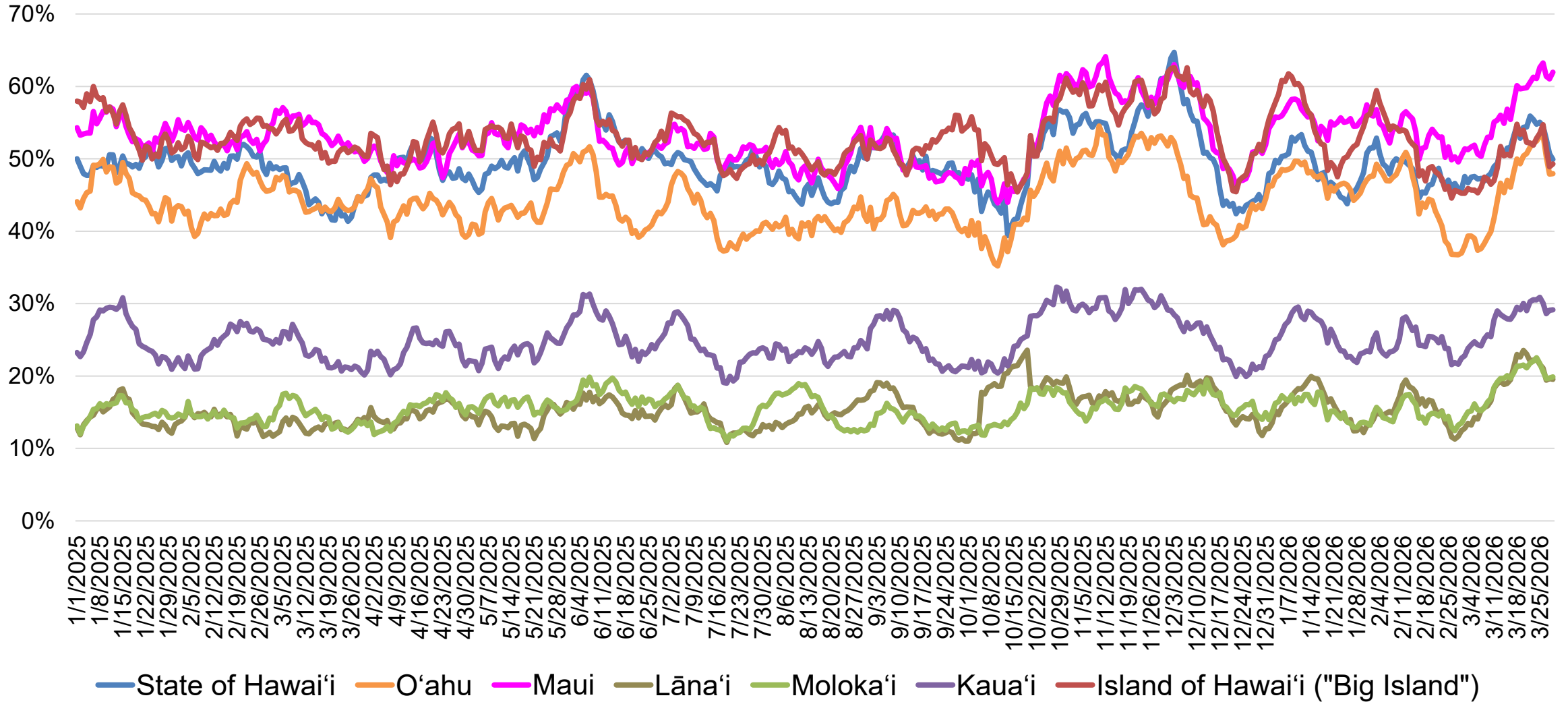


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Canada Destination Brand Health Trends

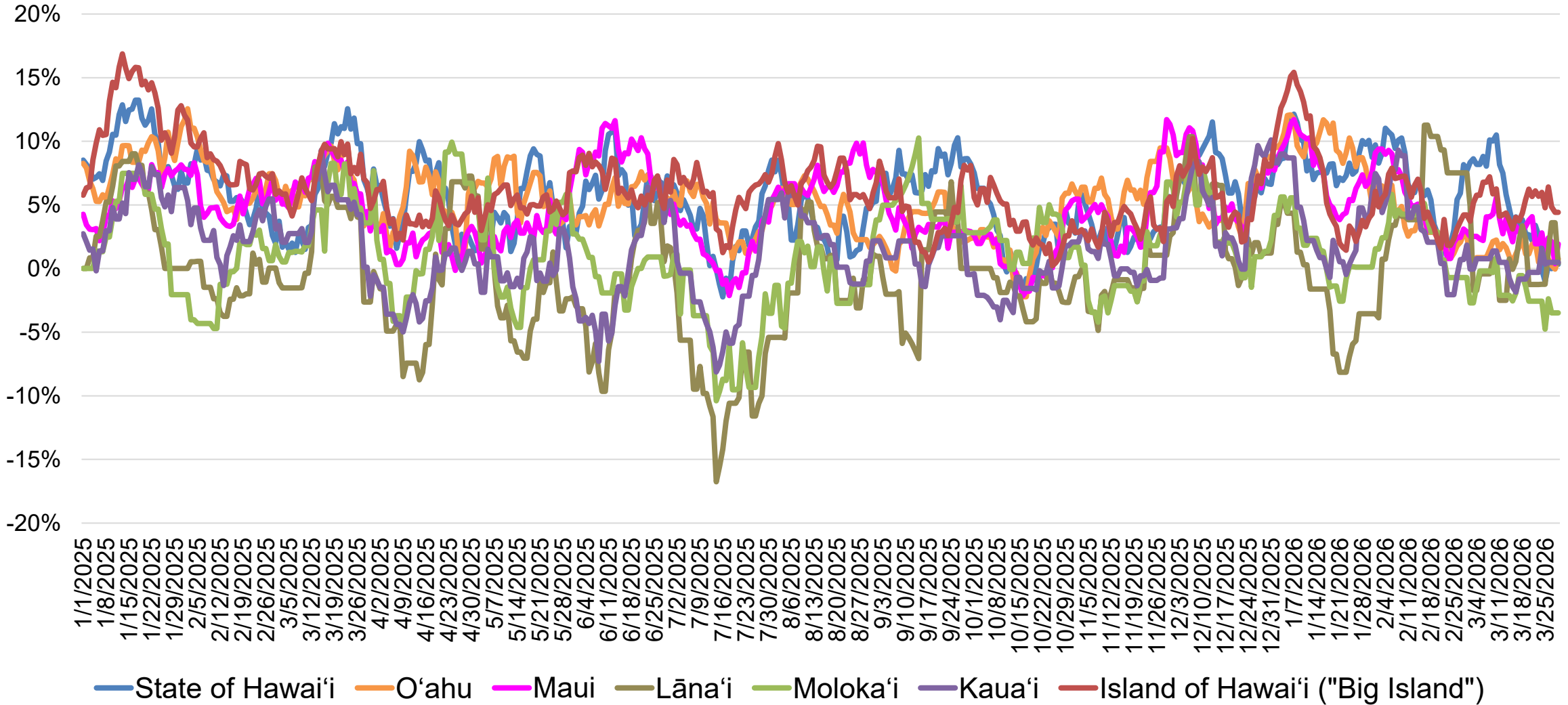


Canada Destination Awareness Two-Week Moving Average



Source: Vision Insights Data as of March 30, 2026

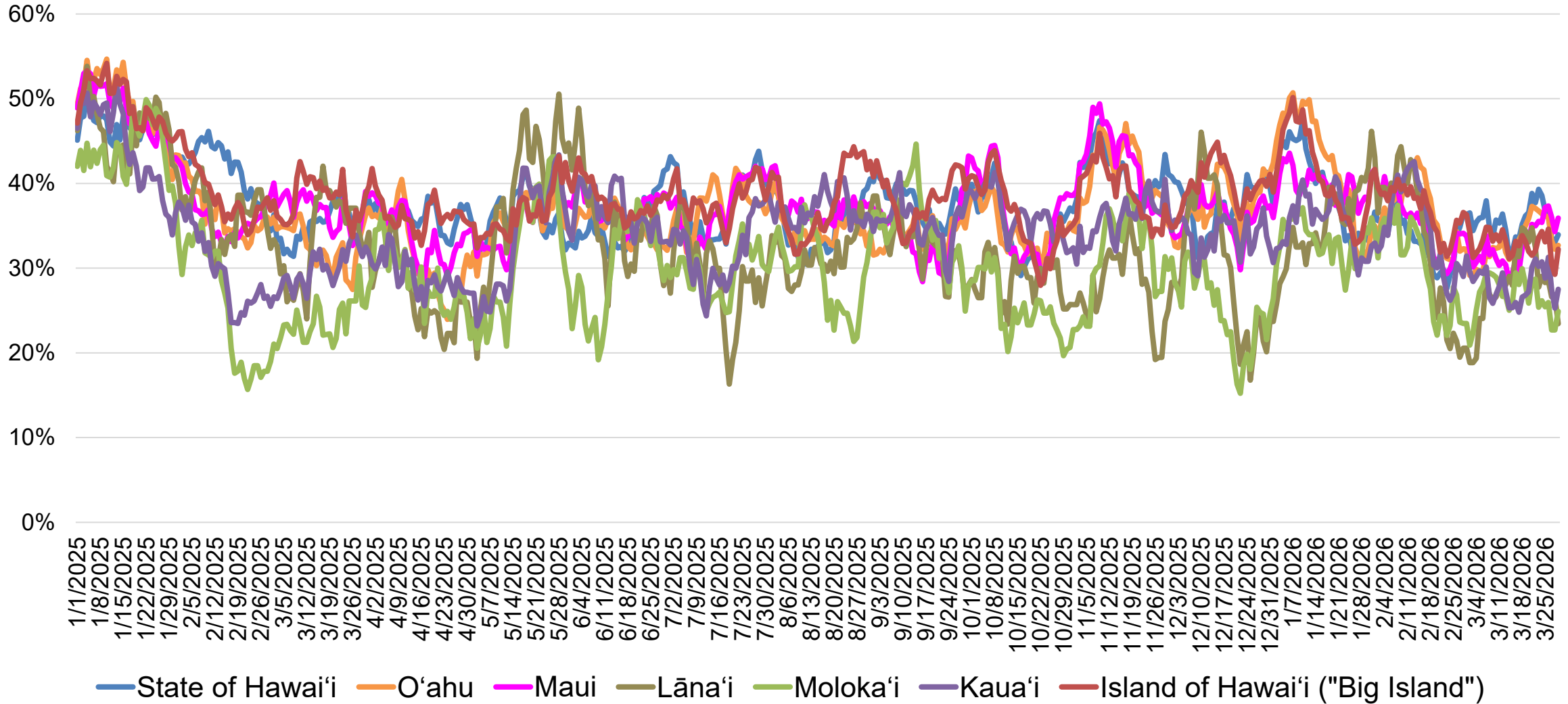
Canada Chatter (Net) Two-Week Moving Average



Source: Vision Insights Data as of March 30, 2026

Samples for Lāna'i are limited

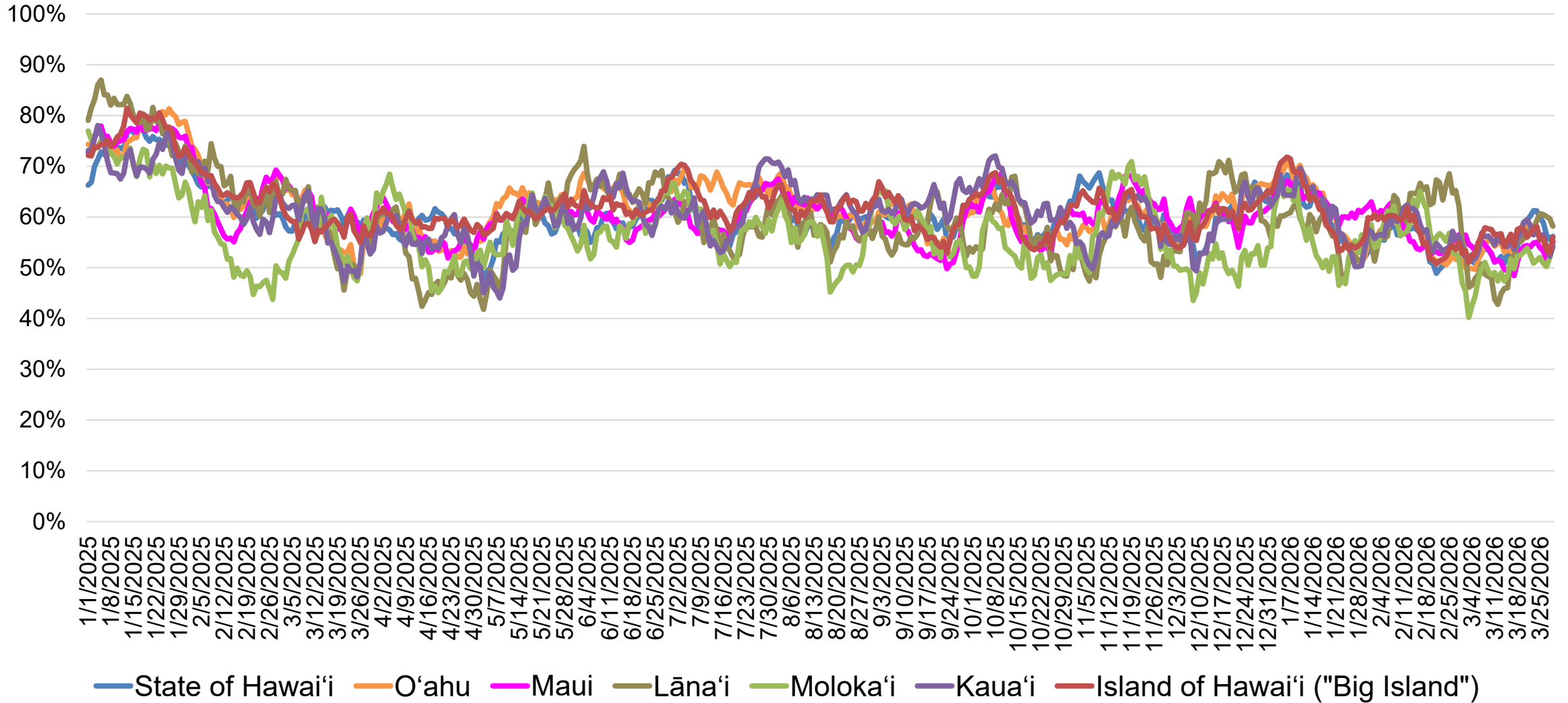
Canada Consideration Two-Week Moving Average



Source: Vision Insights Data as of March 30, 2026

Samples for Lāna'i are limited

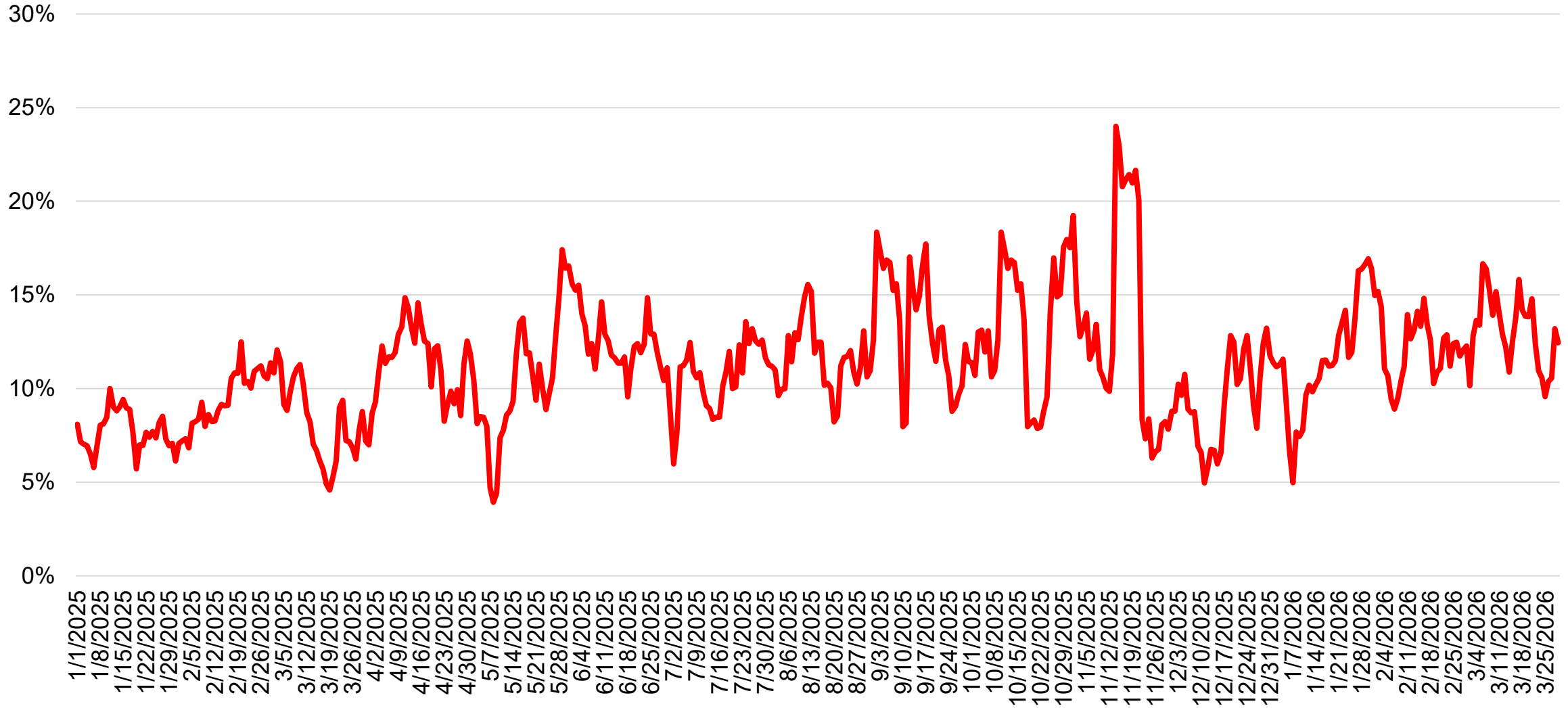
Canada Favorability Two-Week Moving Average



Source: Vision Insights Data as of March 30, 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 30, 2026

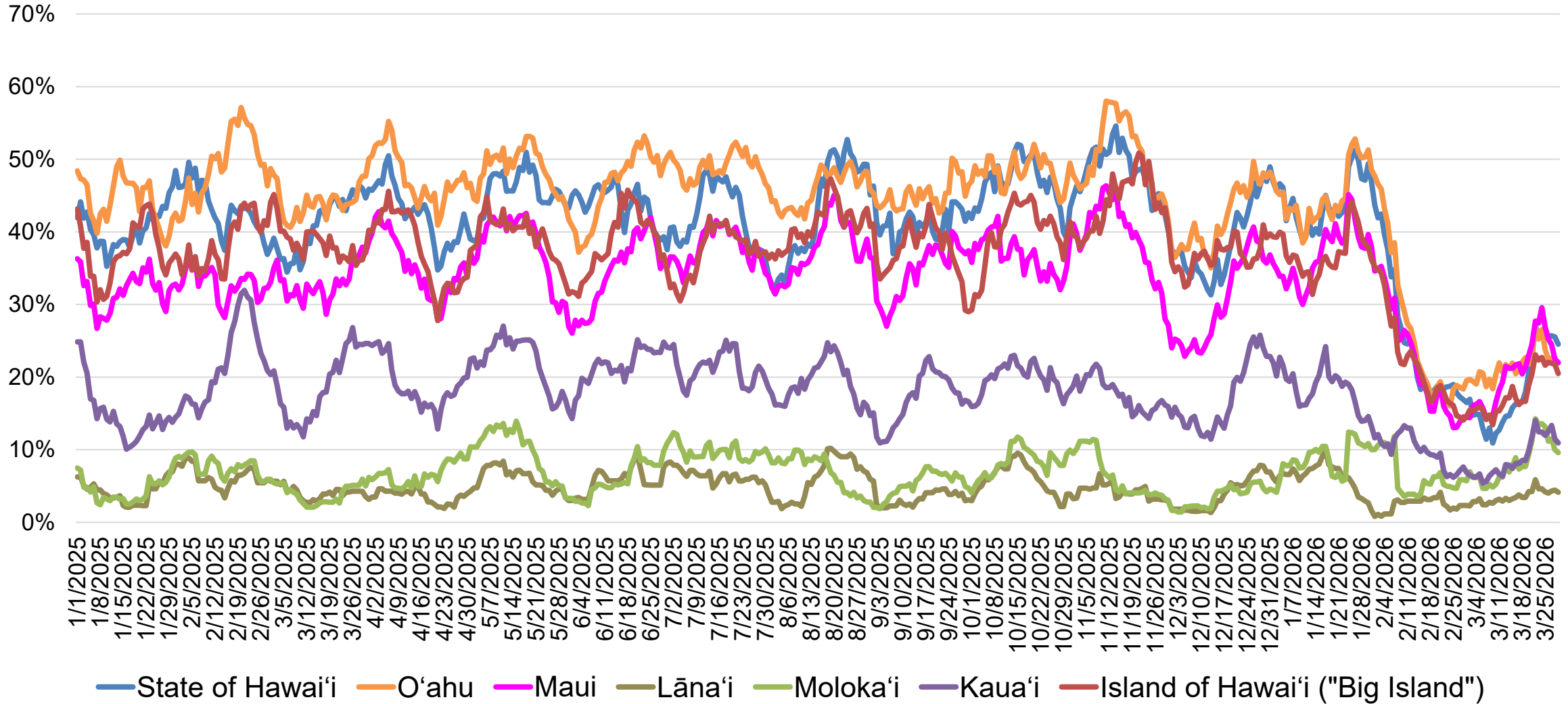


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Japan Destination Brand Health Trends

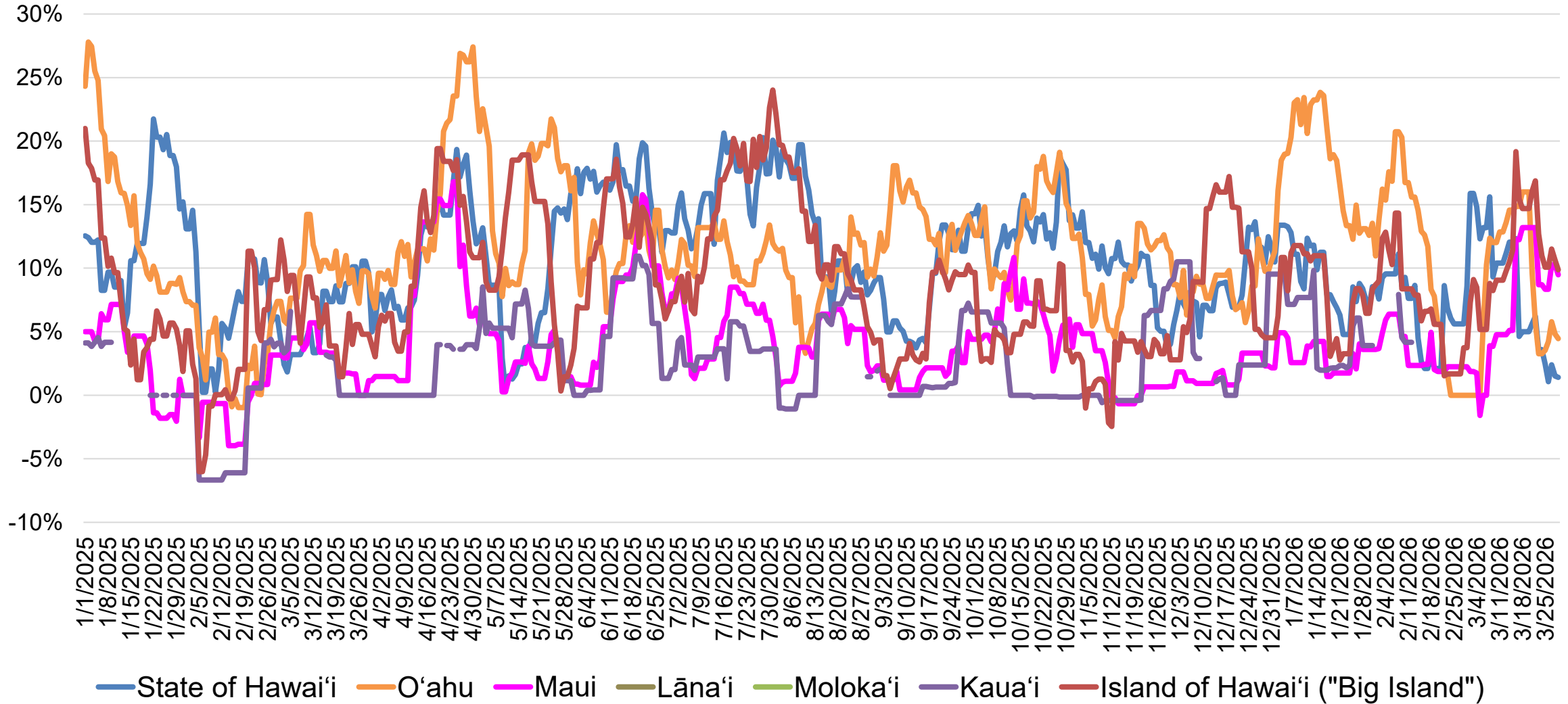


Japan Destination Awareness Two-Week Moving Average



Source: Vision Insights Data as of March 30, 2026

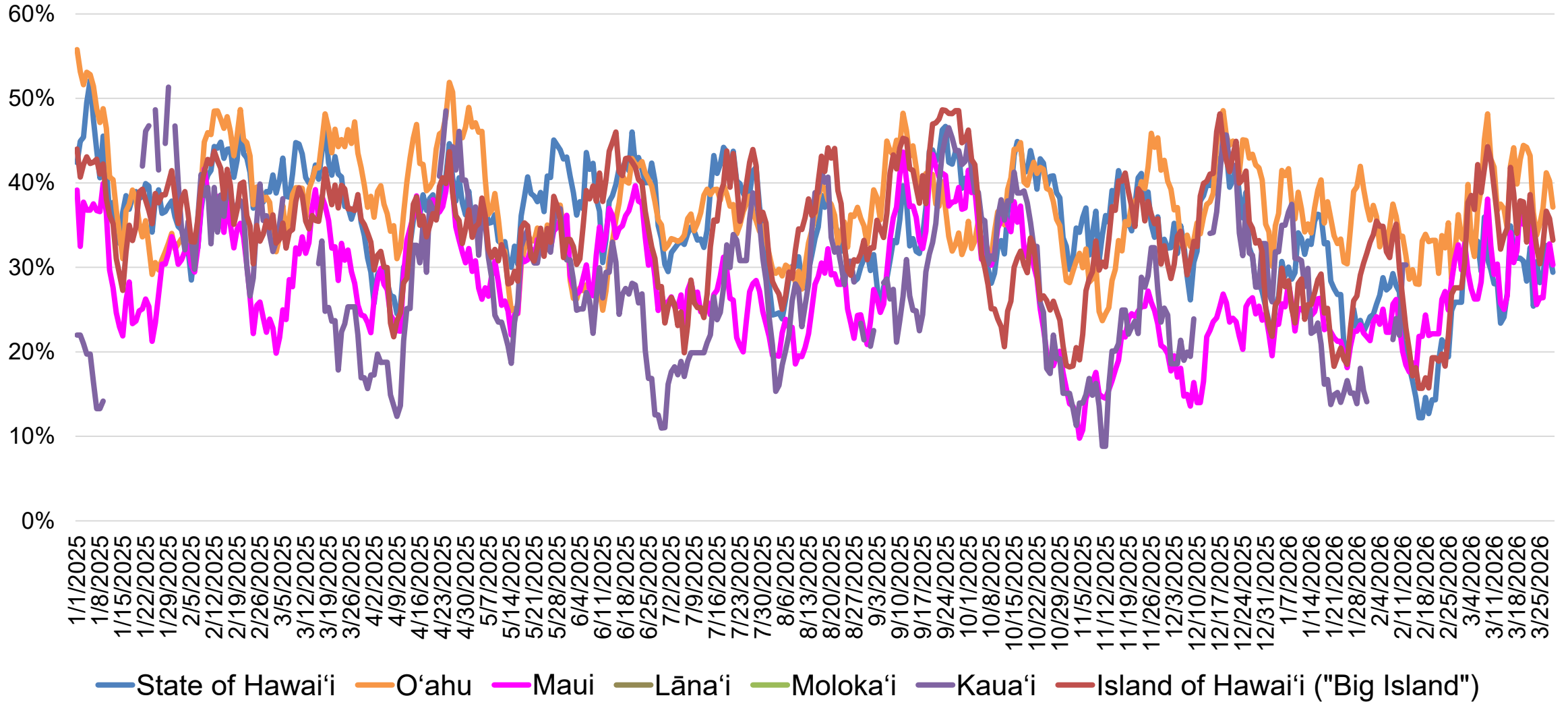
Japan Chatter (Net) Two-Week Moving Average



Source: Vision Insights Data as of March 30, 2026

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

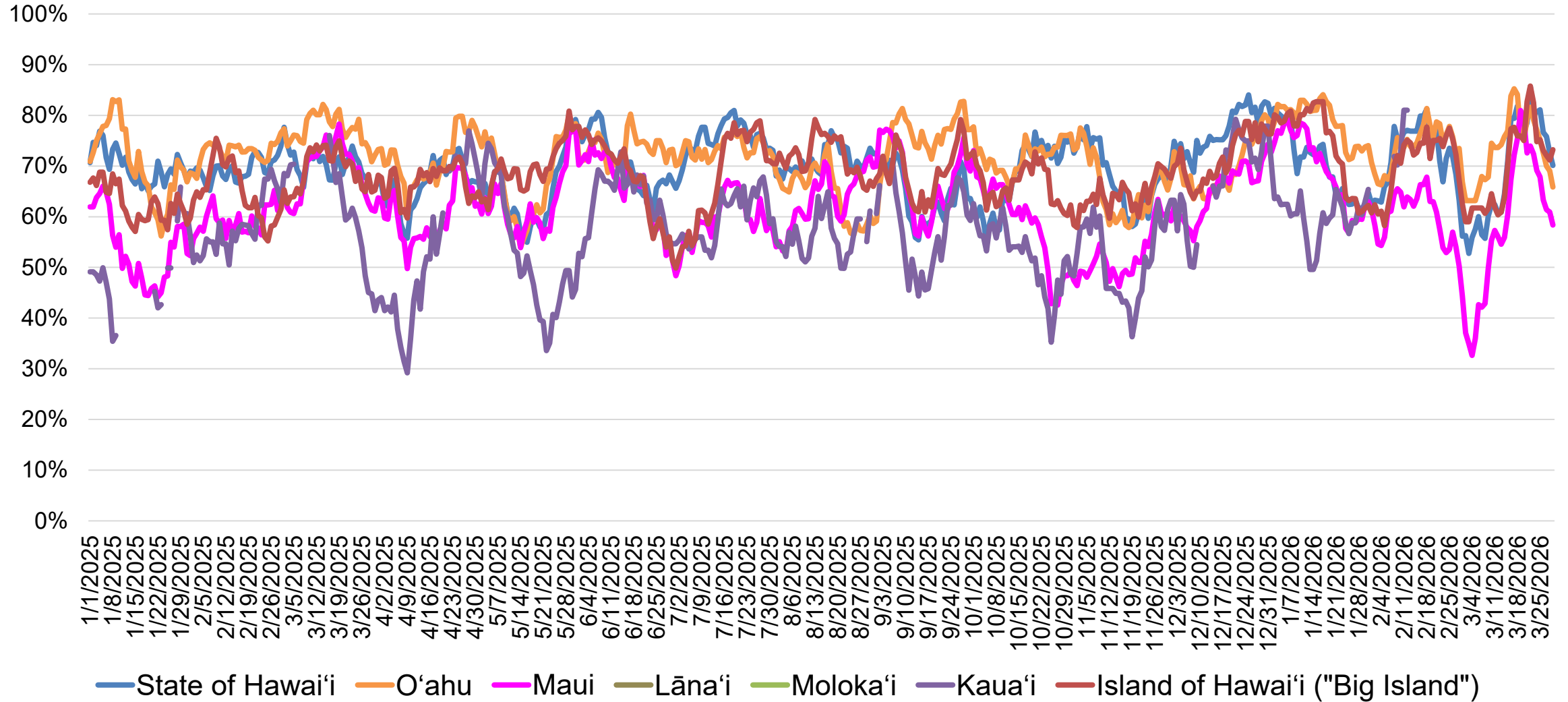
Japan Consideration Two-Week Moving Average



Source: Vision Insights Data as of March 30, 2026

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

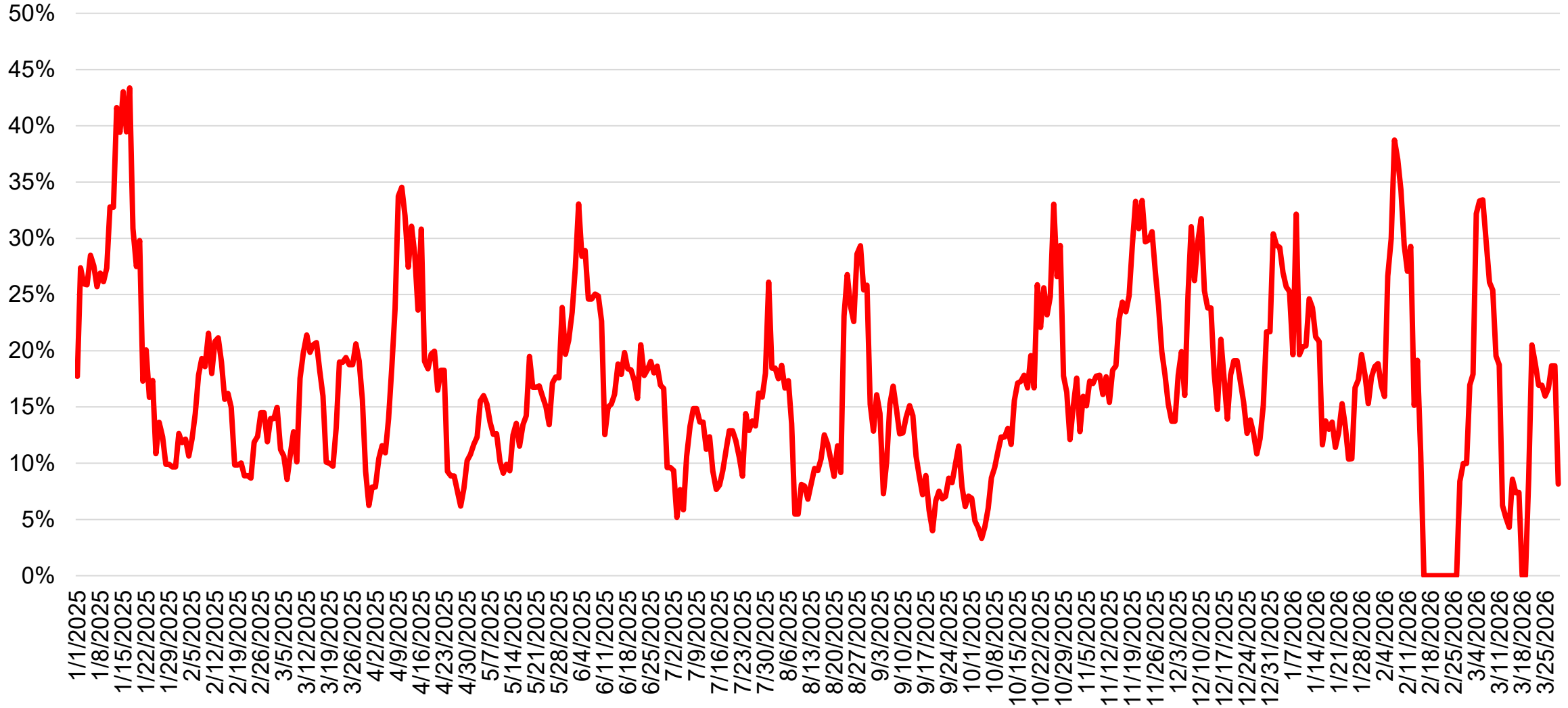
Japan Favorability Two-Week Moving Average



Source: Vision Insights Data as of March 30, 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 30, 2026

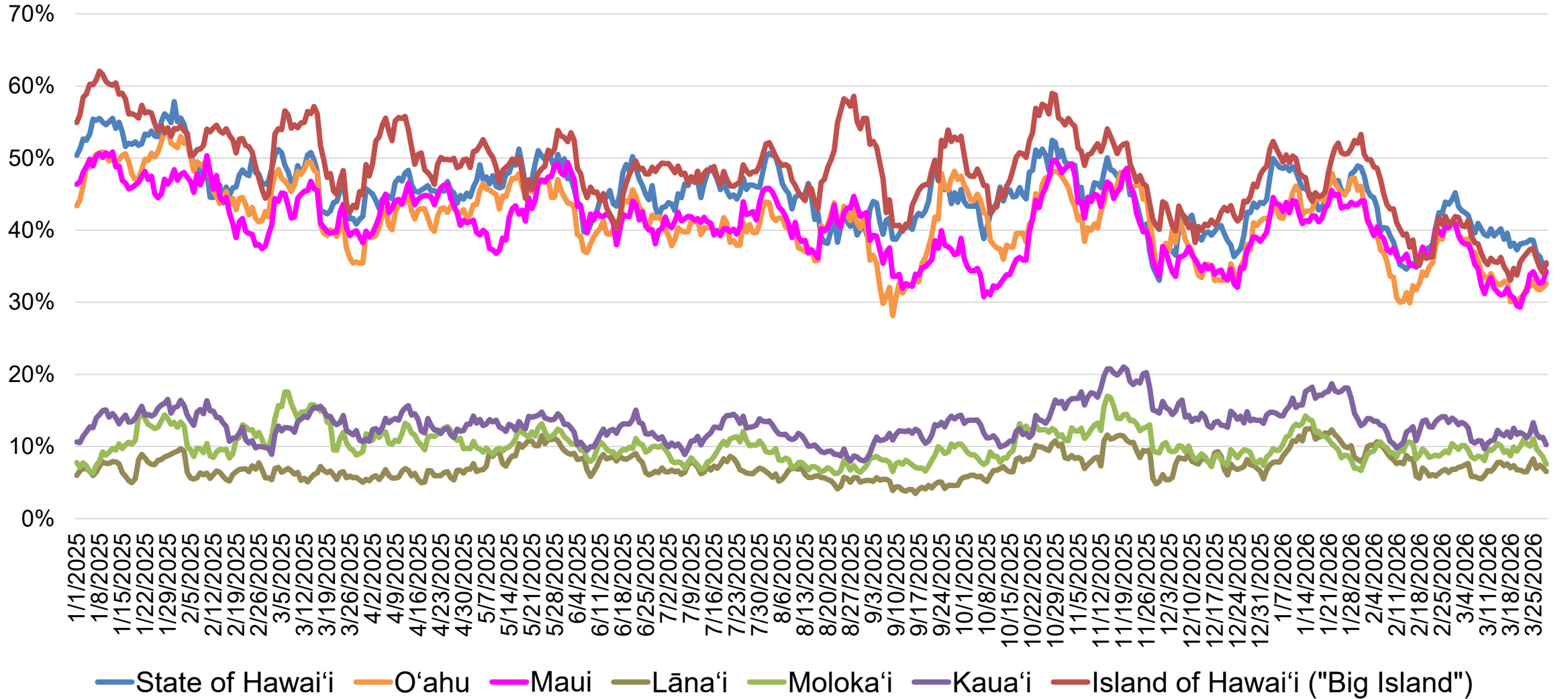


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Australia Destination Brand Health Trends

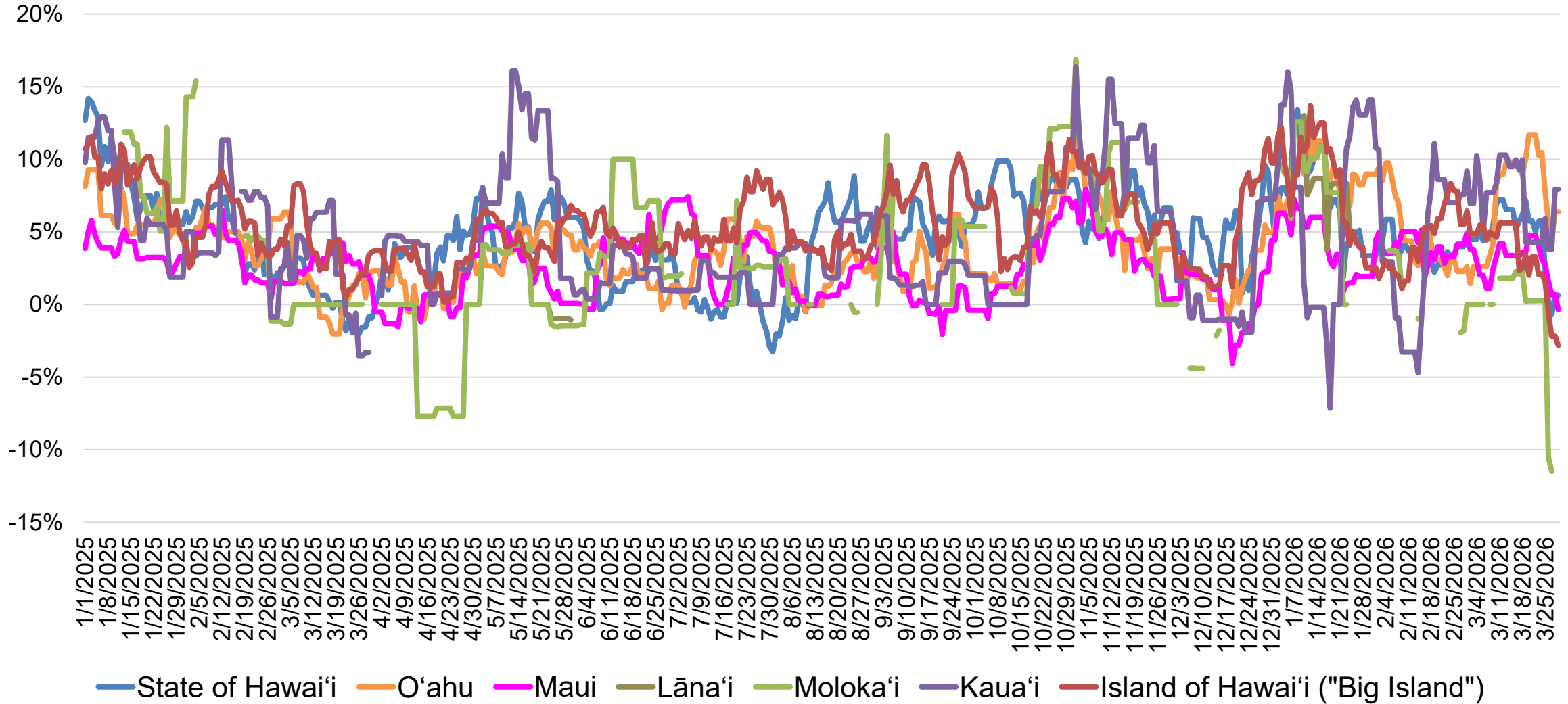


Australia Destination Awareness Two-Week Moving Average



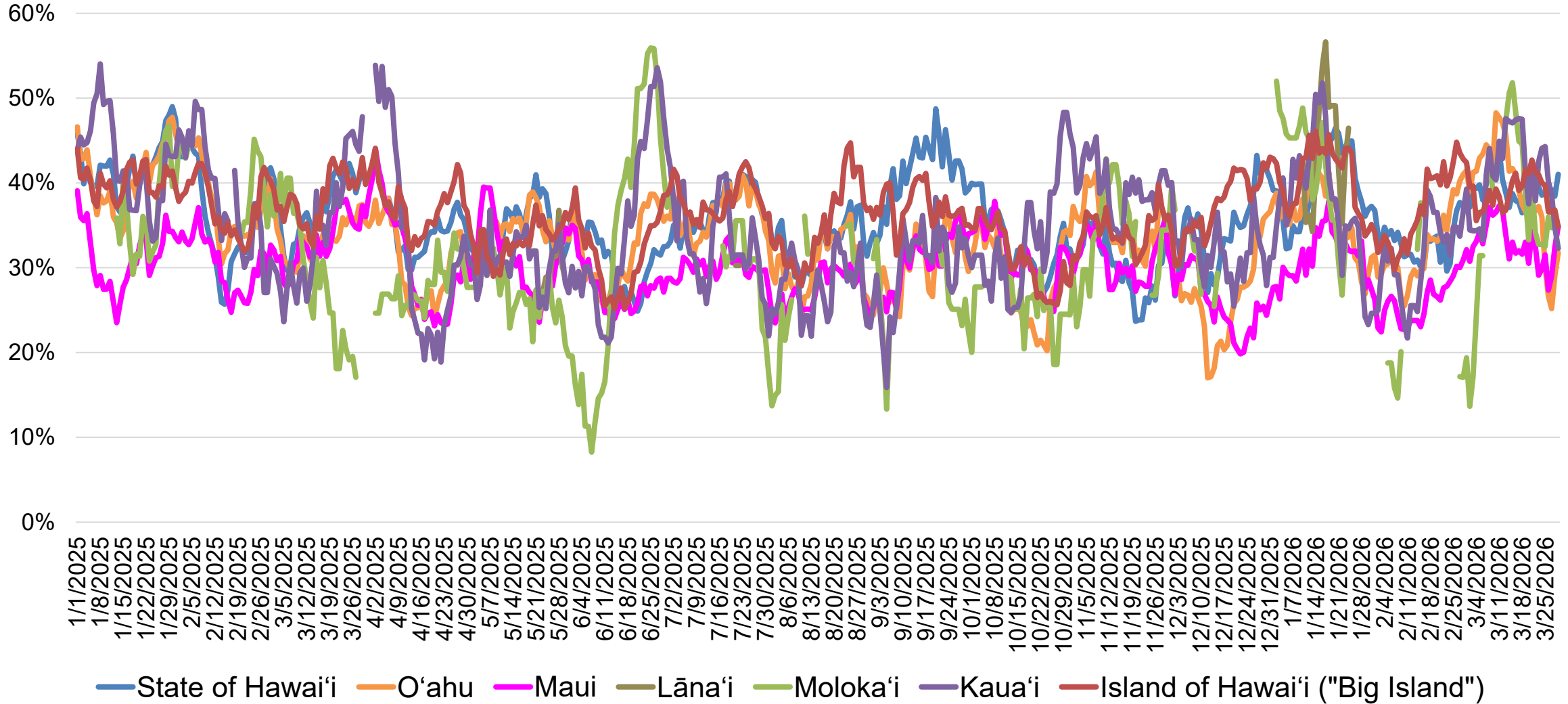
Source: Vision Insights Data as of March 30, 2026

Australia Chatter (Net) Two-Week Moving Average



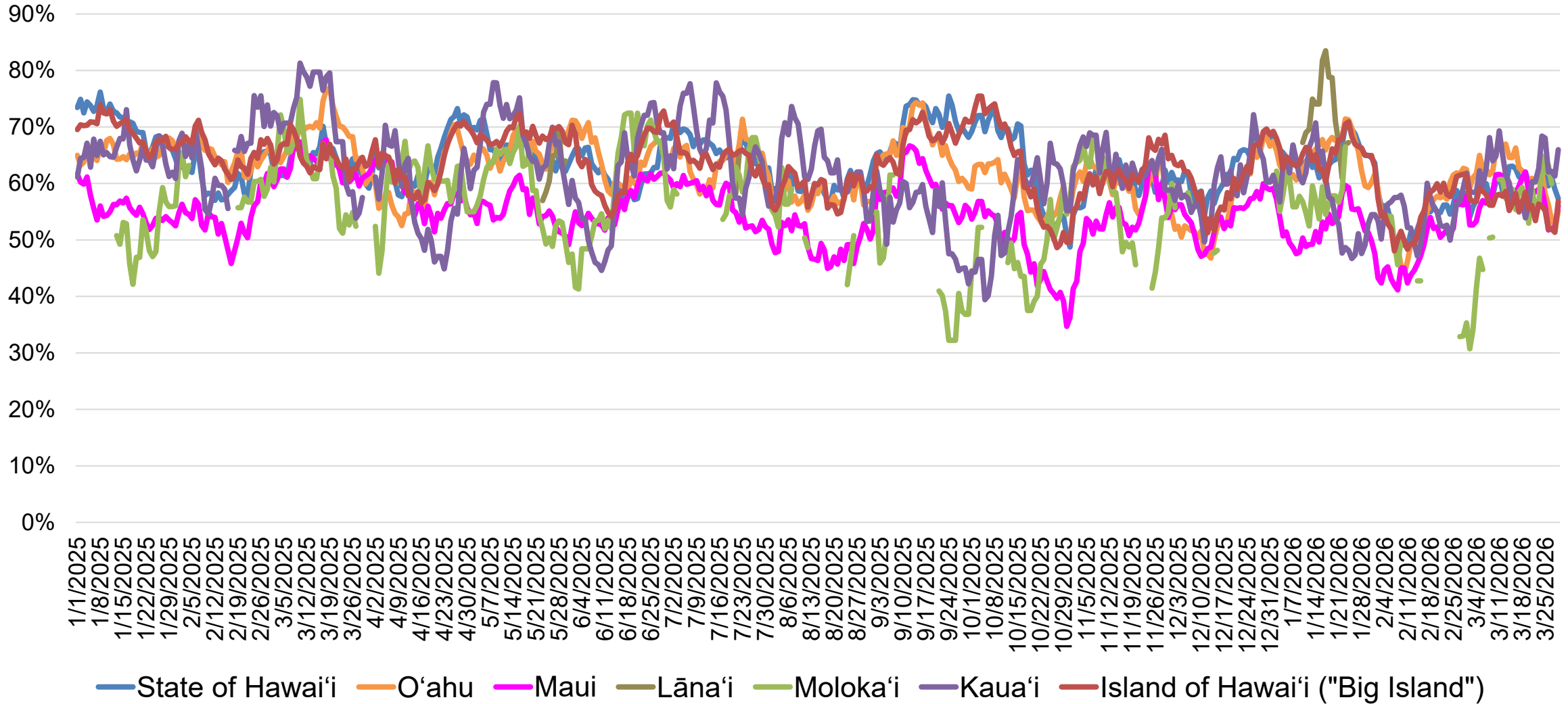
Source: Vision Insights Data as of March 30, 2026
 Samples for Kaua'i, Moloka'i, and Lāna'i are limited

Australia Consideration Two-Week Moving Average



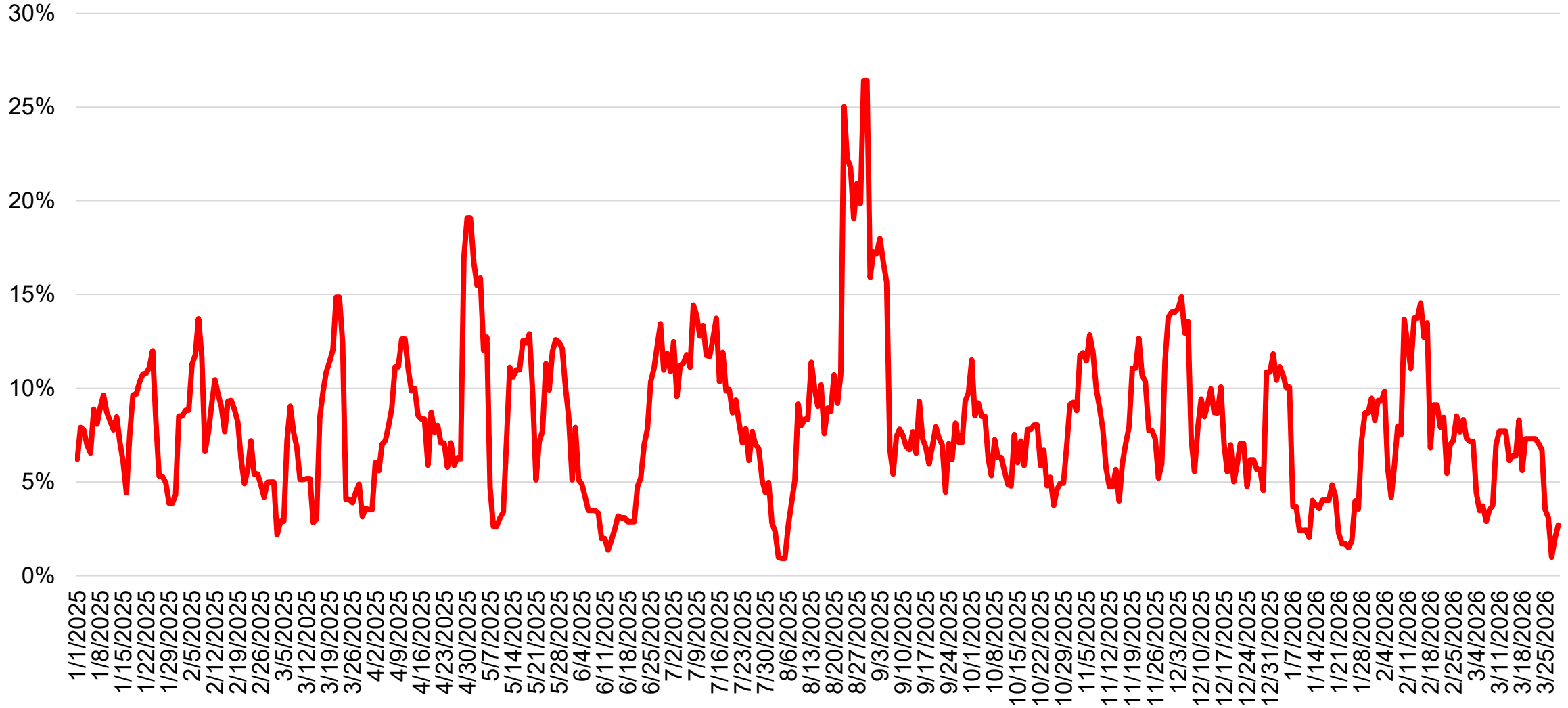
Source: Vision Insights Data as of March 30, 2026
Samples for Kaua'i, Moloka'i, and Lāna'i are limited

Australia Favorability Two-Week Moving Average



Source: Vision Insights Data as of March 30, 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 30, 2026

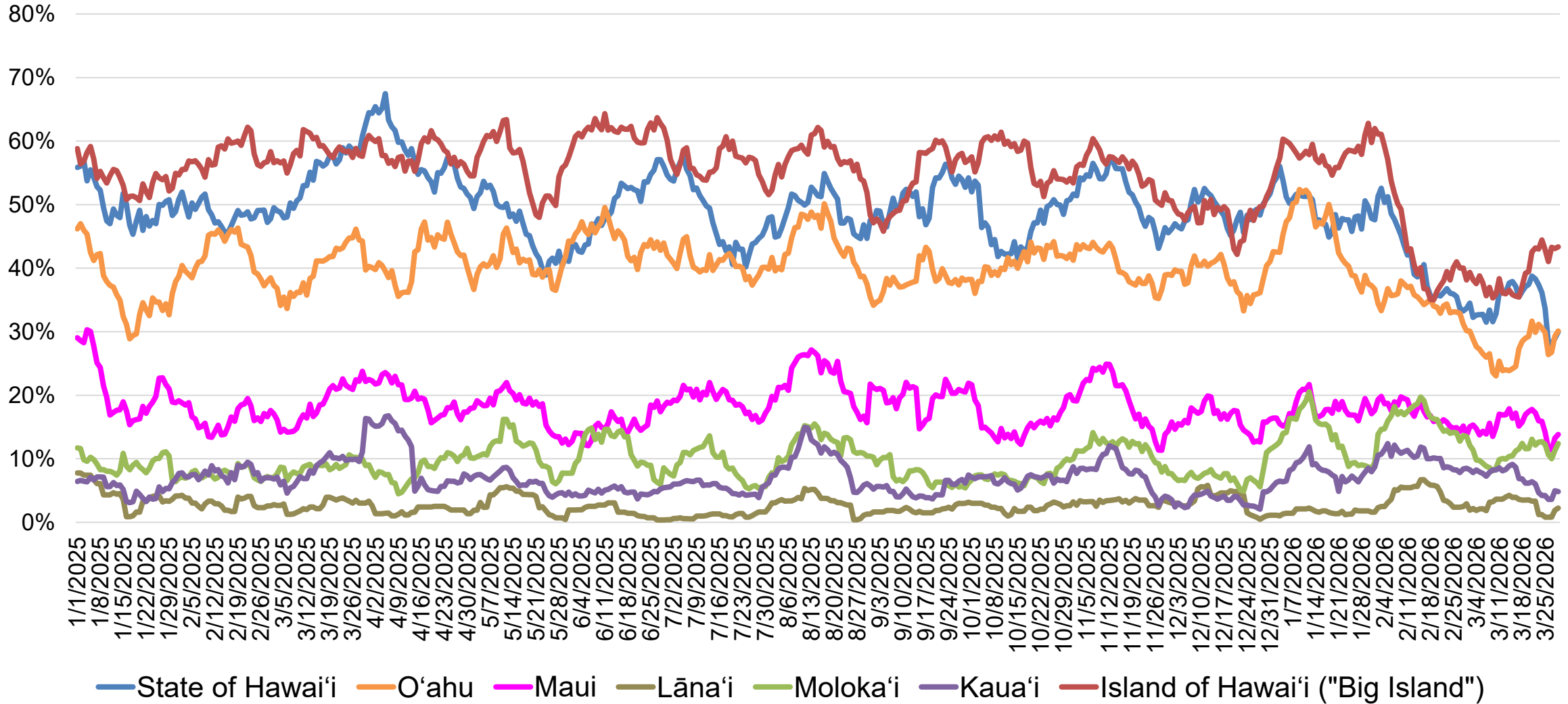


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Korea Destination Brand Health Trends

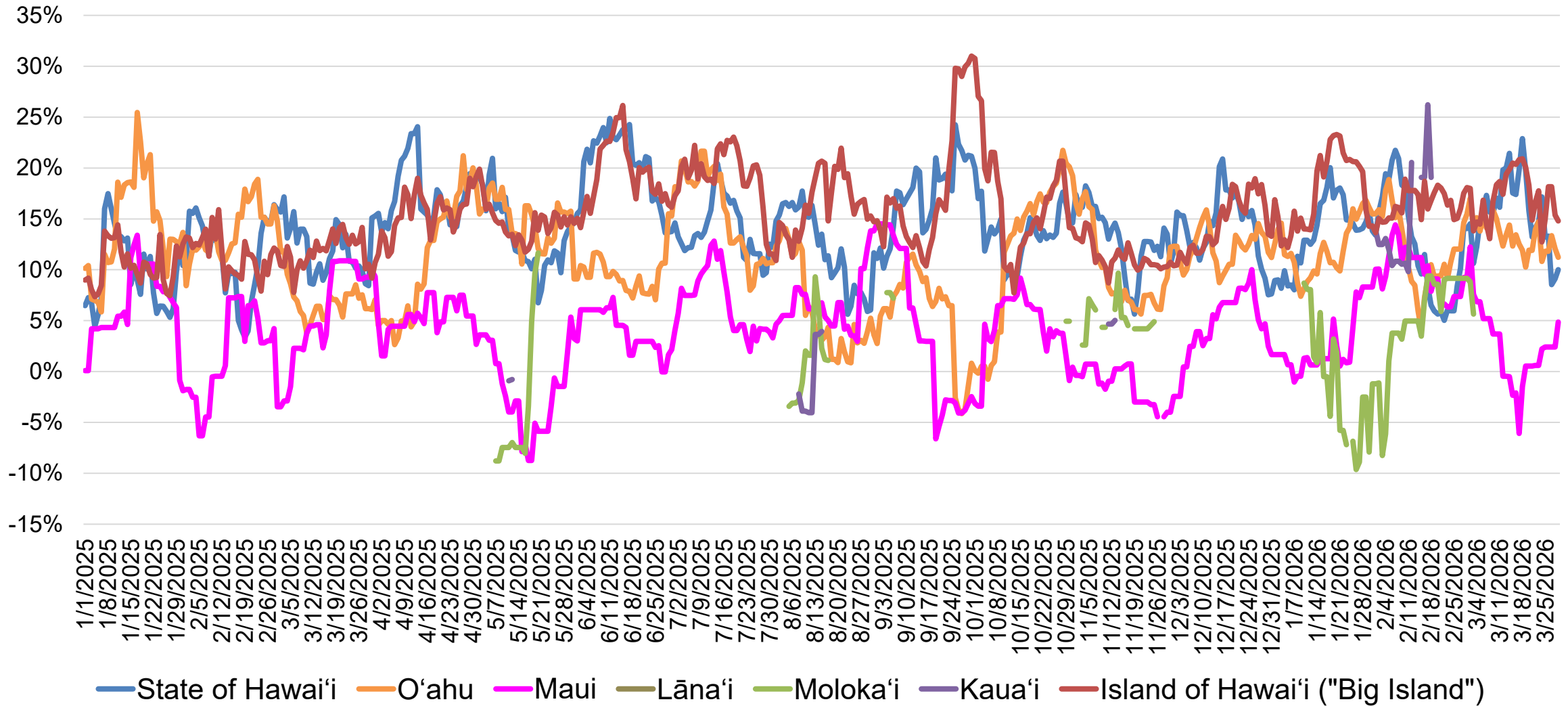


Korea Destination Awareness Two-Week Moving Average



Source: Vision Insights Data as of March 30, 2026

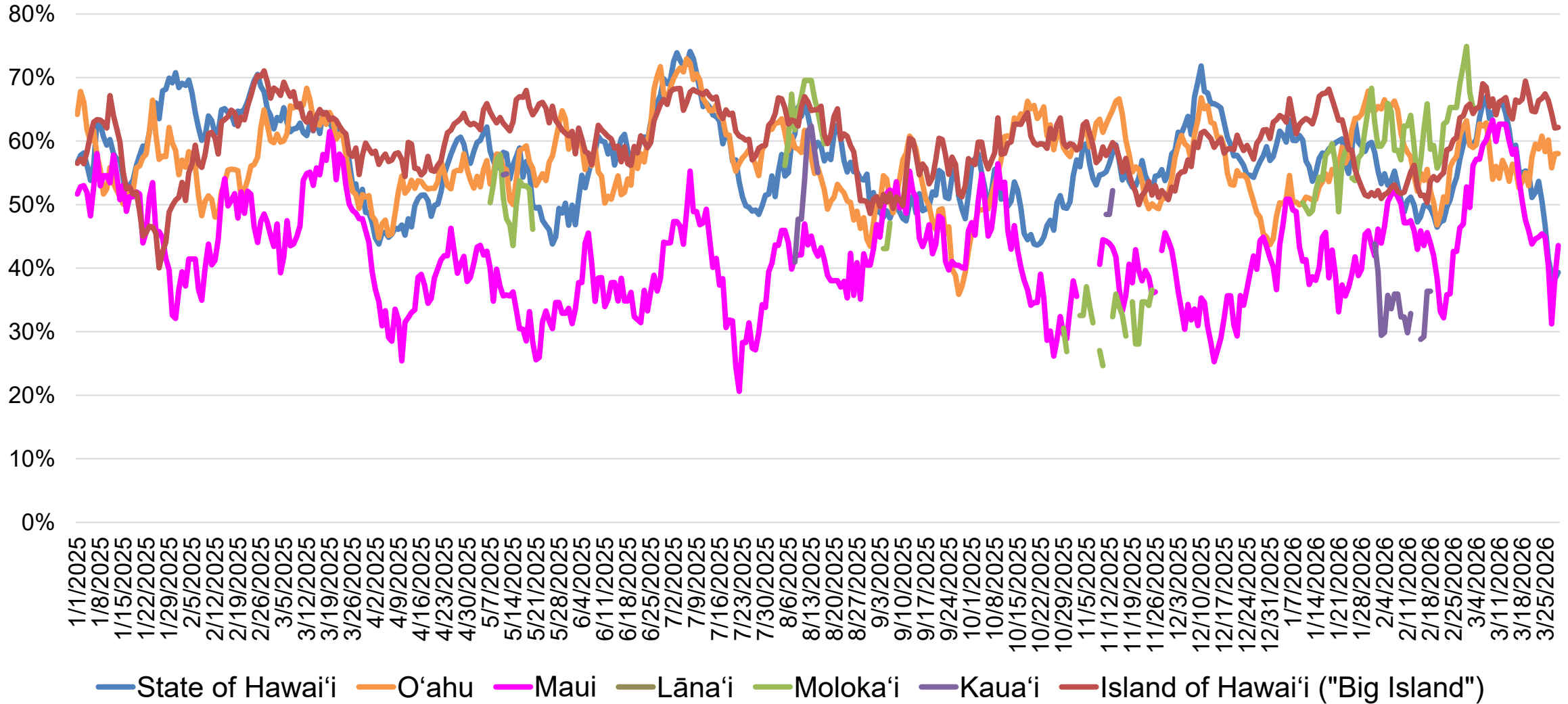
Korea Chatter (Net) Two-Week Moving Average



Source: Vision Insights Data as of March 30, 2026

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

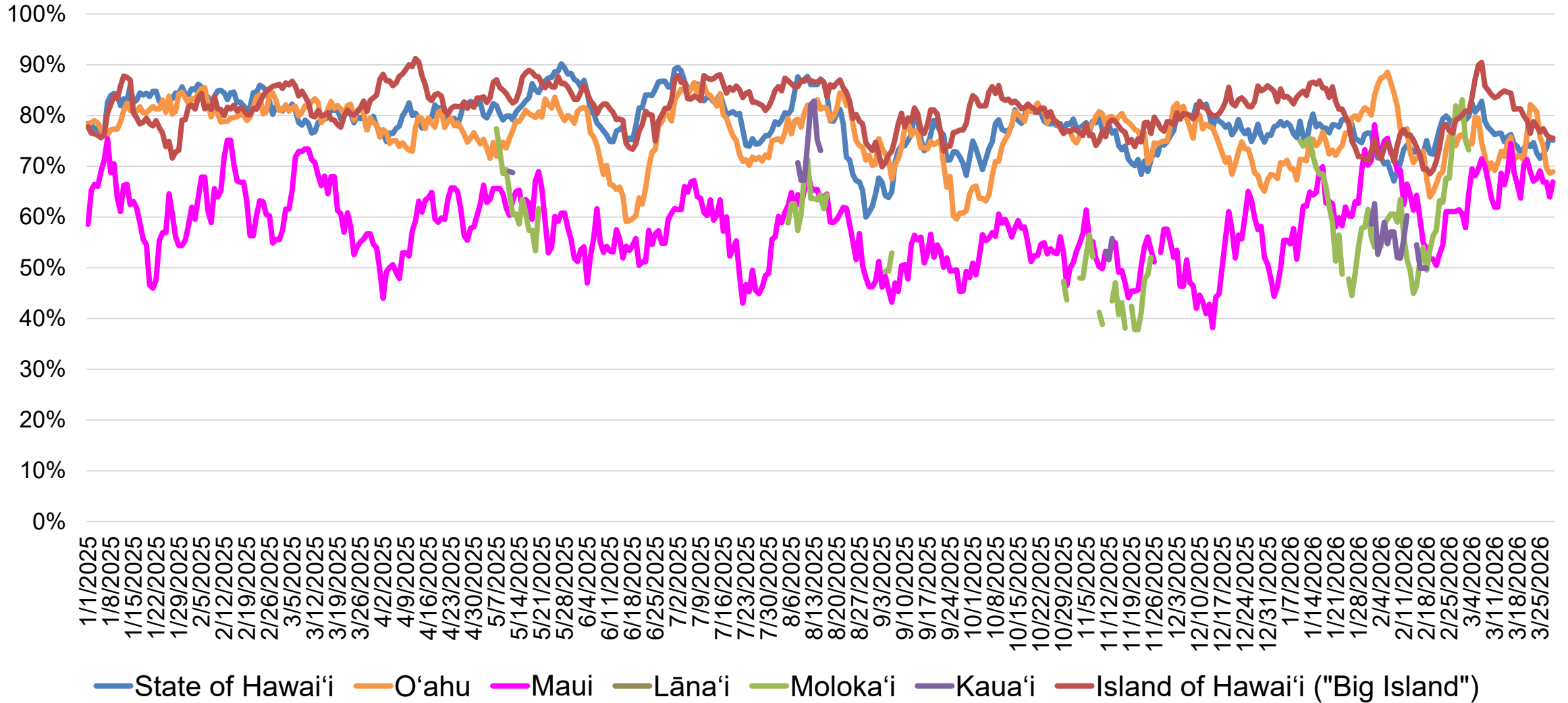
Korea Consideration Two-Week Moving Average



Source: Vision Insights Data as of March 30, 2026

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

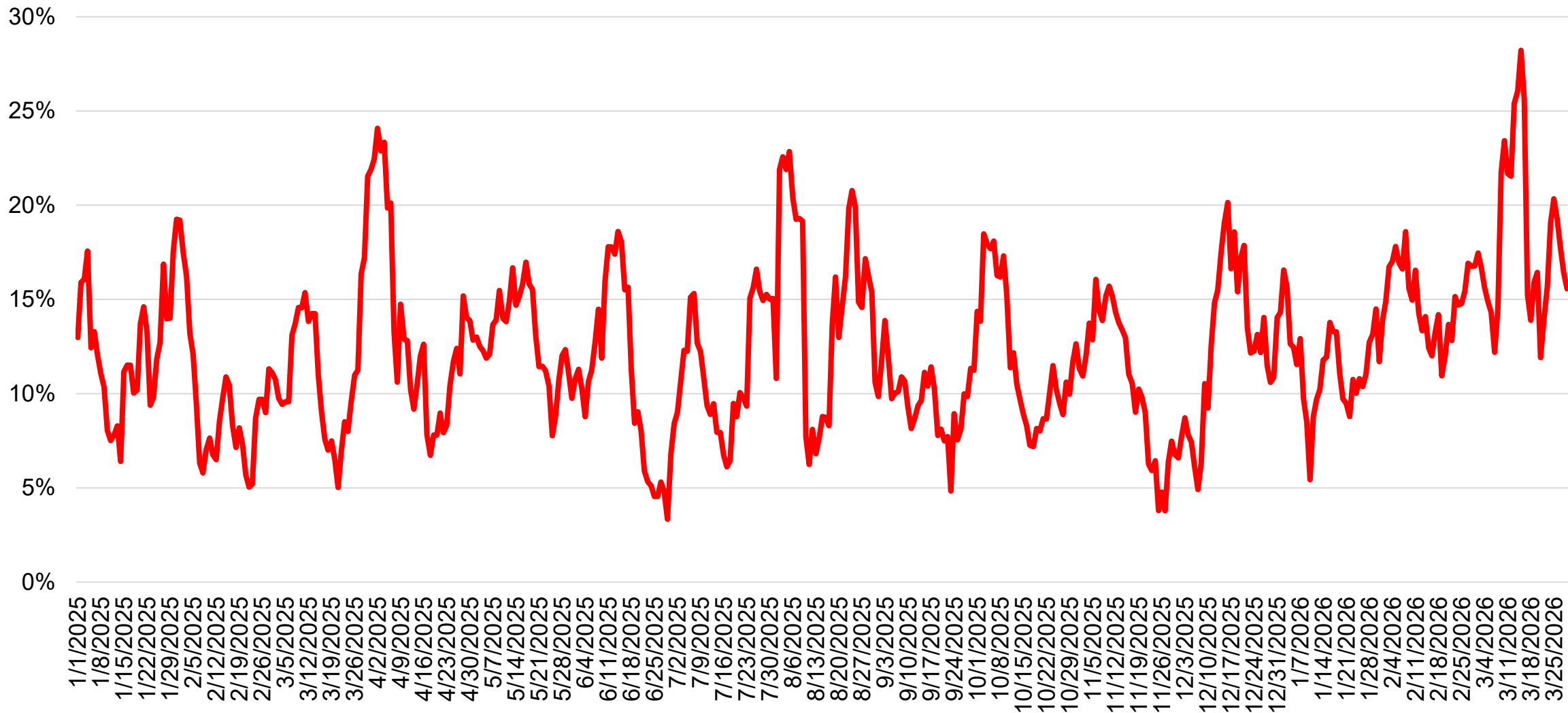
Korea Favorability Two-Week Moving Average



Source: Vision Insights Data as of March 30, 2026

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 30, 2026