



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

# **Vision Insights Destination Brand Health Trends**

July 15, 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 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

# 2024 Significant Dates

**August 2, 2024 –**  
Hawaii Governor Josh Green announced a historic settlement of \$4 billion to resolve all tort claims arising from the 2023 Maui wildfires

**November 5, 2024 –**  
Donald Trump is elected as the 47<sup>th</sup> president of the United States of America

**June 6 - 16, 2024 –**  
The 13<sup>th</sup> Festival of the Pacific Arts & Culture (FestPAC), which is the world's largest celebration of indigenous Pacific Islanders, took place at the Hawai'i Convention Center. Delegations from more than 20 nations participated in FestPAC

**September 18, 2024 –**  
Hawaiian Airlines is officially acquired by Alaska Airlines, expanding passengers' access to domestic and international destinations

**December 11, 2024 –**  
The 11<sup>th</sup> Eddie Aikau Big Wave Invitational surfing competition was held at Waimea Bay

# 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





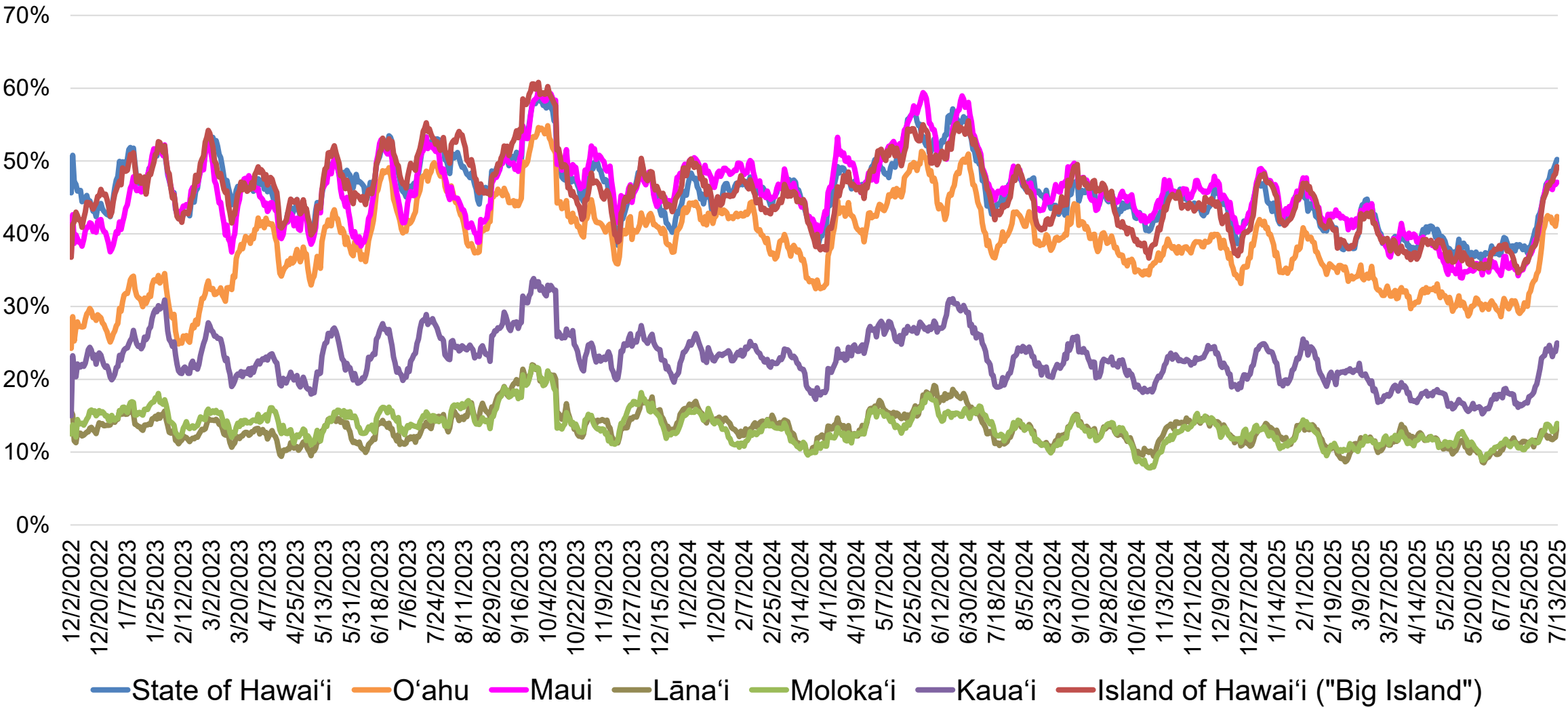
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# **United States Destination Brand Health Trends**



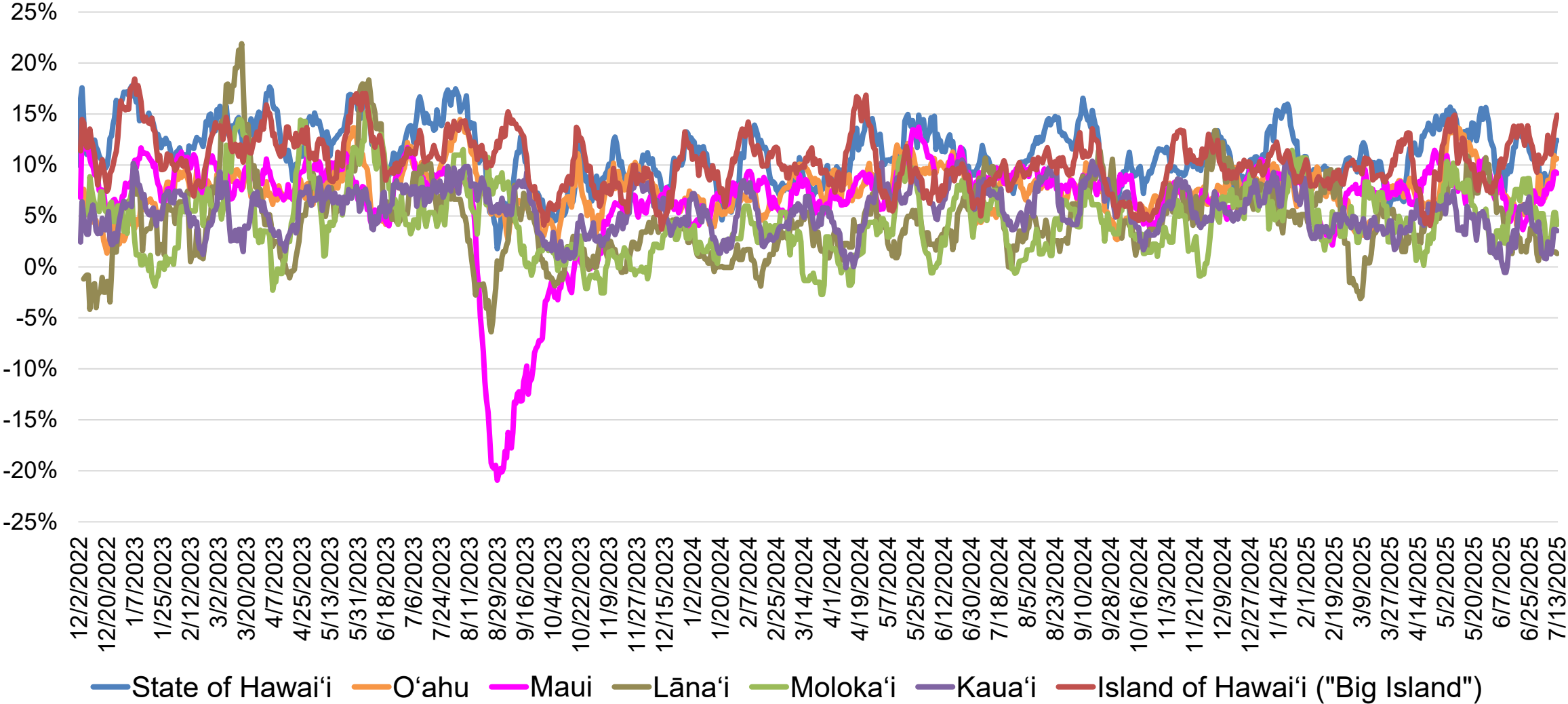


# U.S. Destination Awareness Two-Week Moving Average



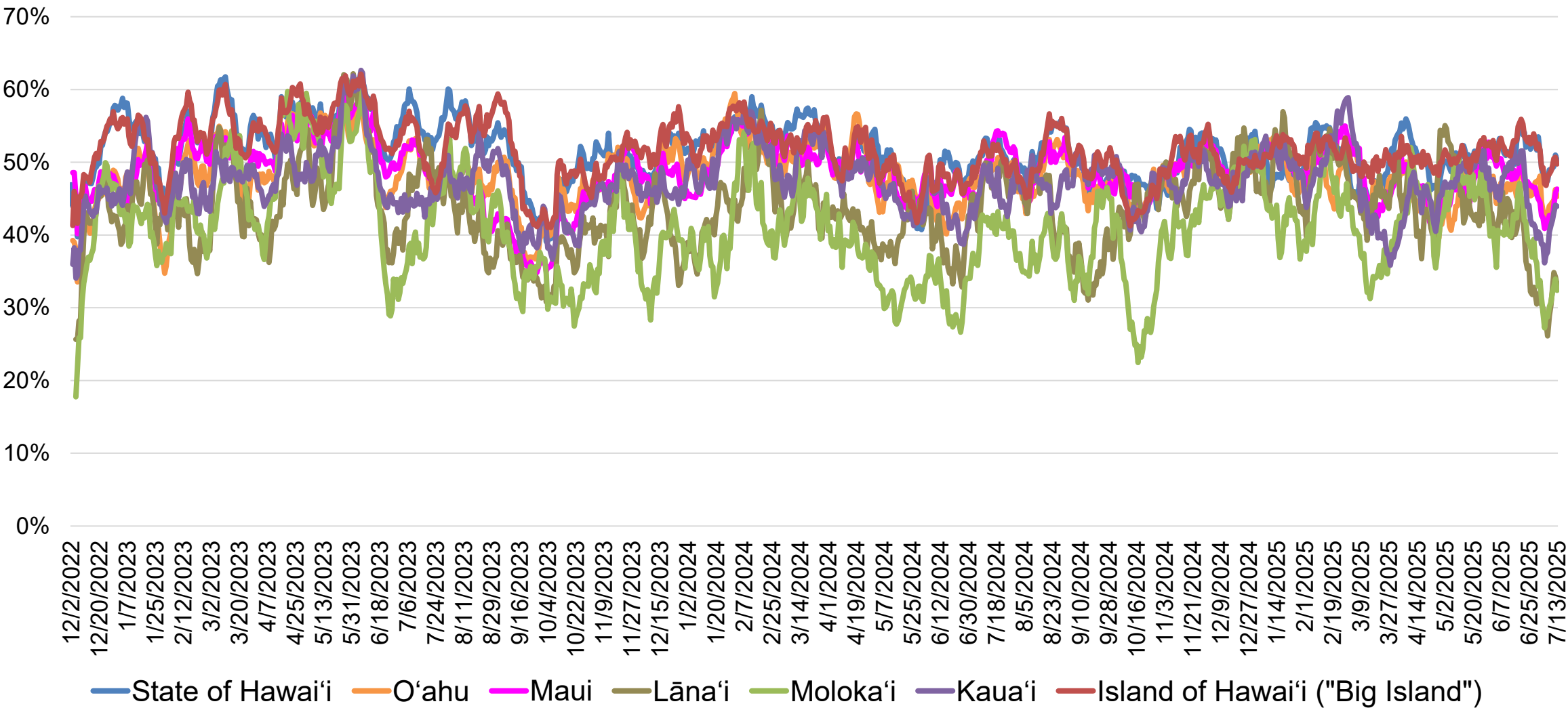
Source: Vision Insights Data as of July 15, 2025

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



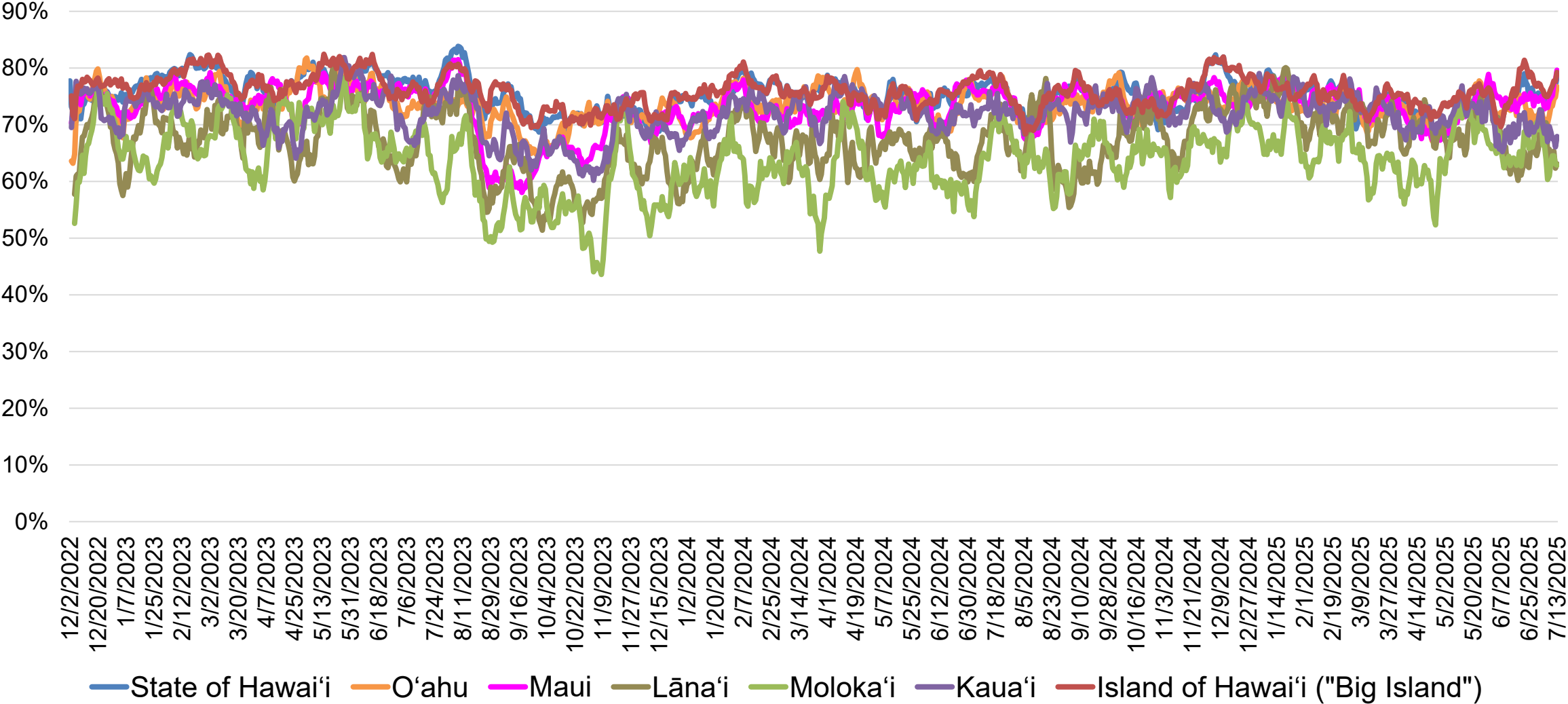
Source: Vision Insights Data as of July 15, 2025

# U.S. Consideration Two-Week Moving Average



Source: Vision Insights Data as of July 15, 2025

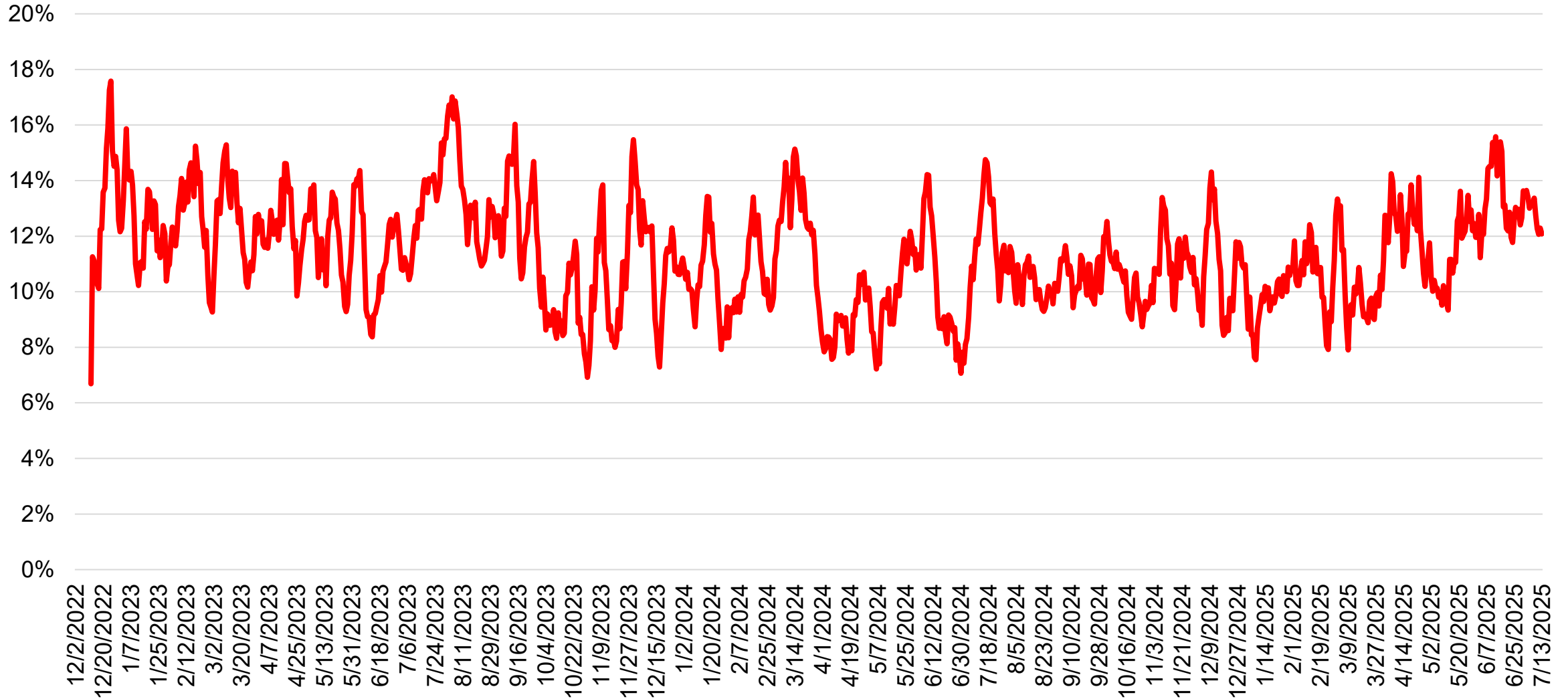
# U.S. Favorability Two-Week Moving Average



Source: Vision Insights Data as of July 15, 2025

# U.S. Intent to Travel to Any Hawaiian Island

## One-Week Moving Average



Source: Vision Insights Data as of July 15, 2025

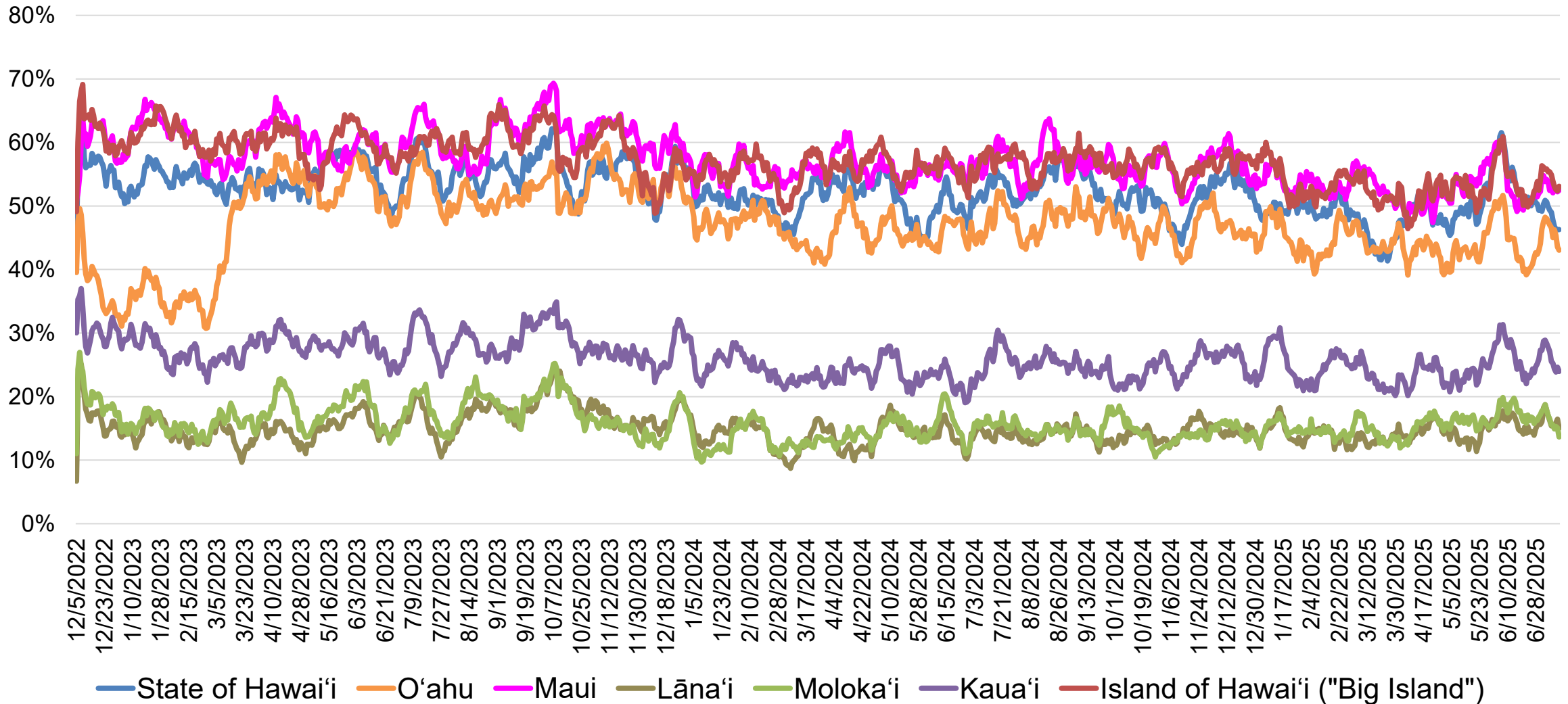


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# **Canada Destination Brand Health Trends**



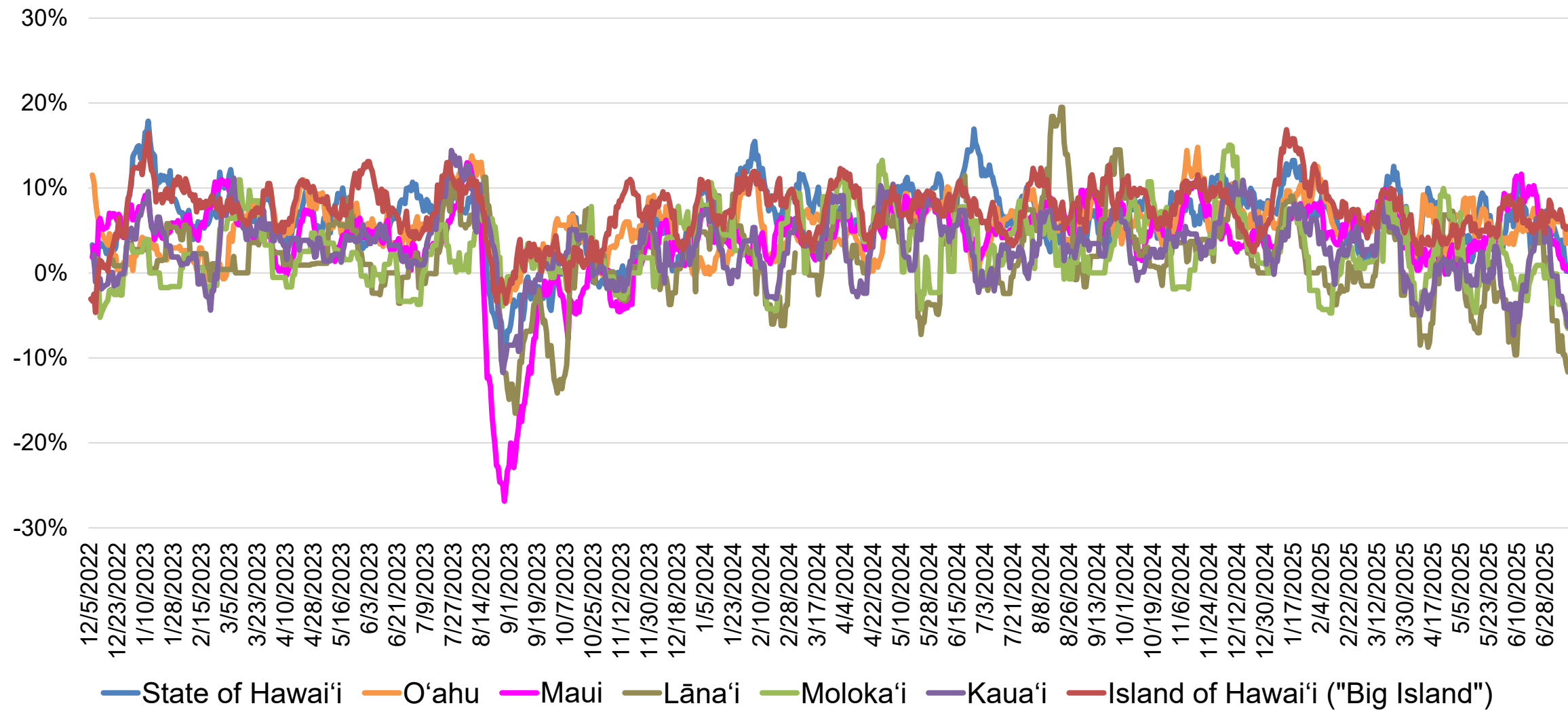
# Canada Destination Awareness Two-Week Moving Average



Source: Vision Insights Data as of July 15, 2025



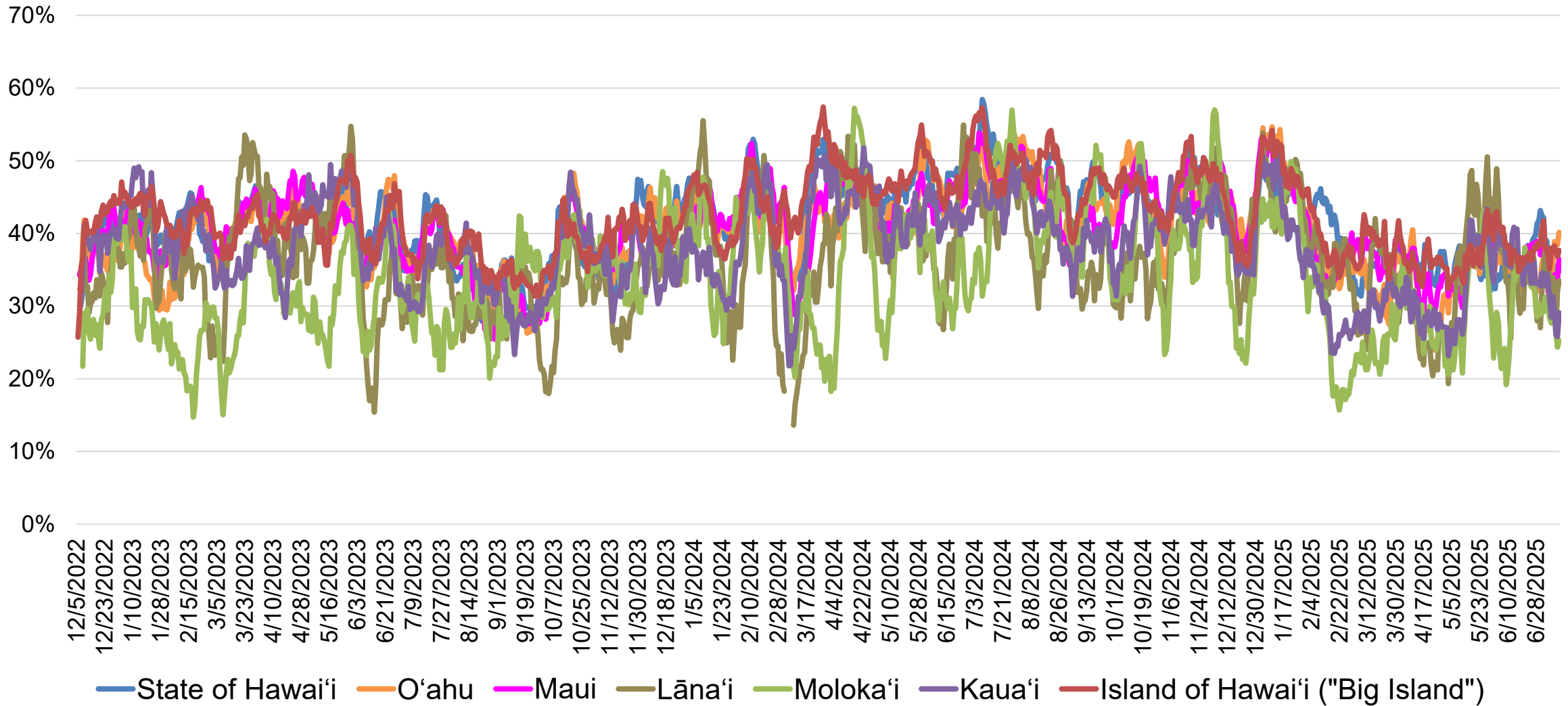
# Canada Chatter (Net) Two-Week Moving Average



Source: Vision Insights Data as of July 15, 2025

Samples for Lāna'i are limited

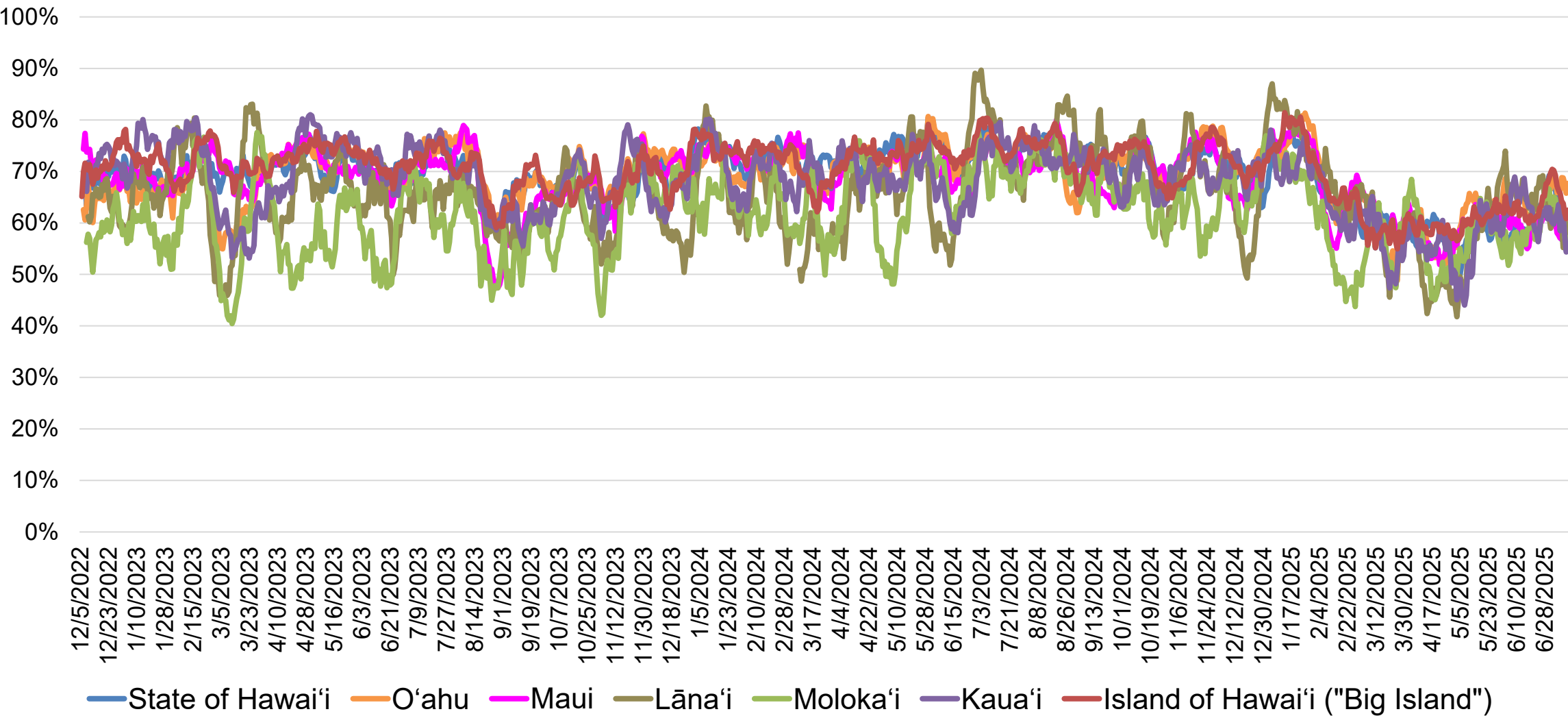
# Canada Consideration Two-Week Moving Average



Source: Vision Insights Data as of July 15, 2025

Samples for Lāna'i are limited

# Canada Favorability Two-Week Moving Average

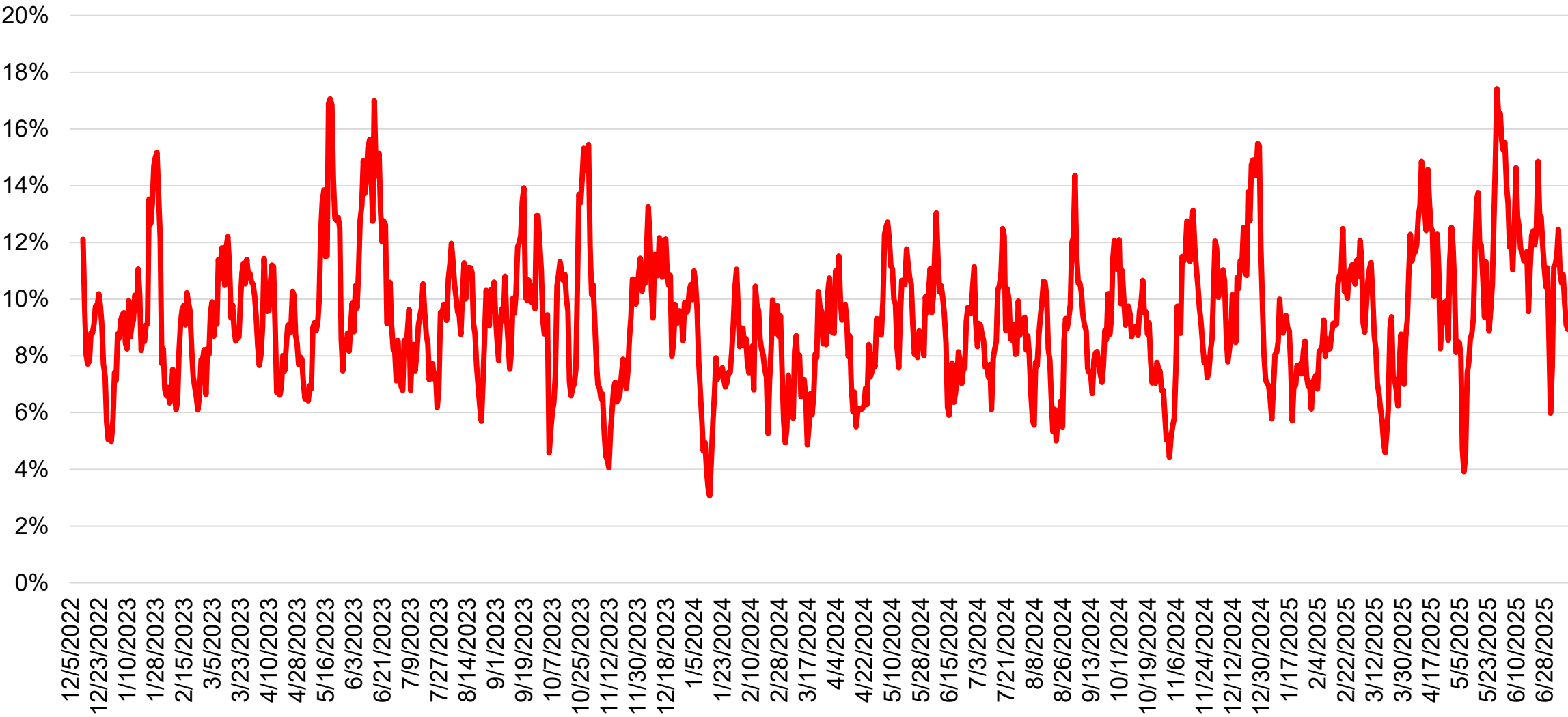


Source: Vision Insights Data as of July 15, 2025

Samples for Lāna'i are limited

# Canada Intent to Travel to Any Hawaiian Island

## One-Week Moving Average



Source: Vision Insights Data as of July 15, 2025

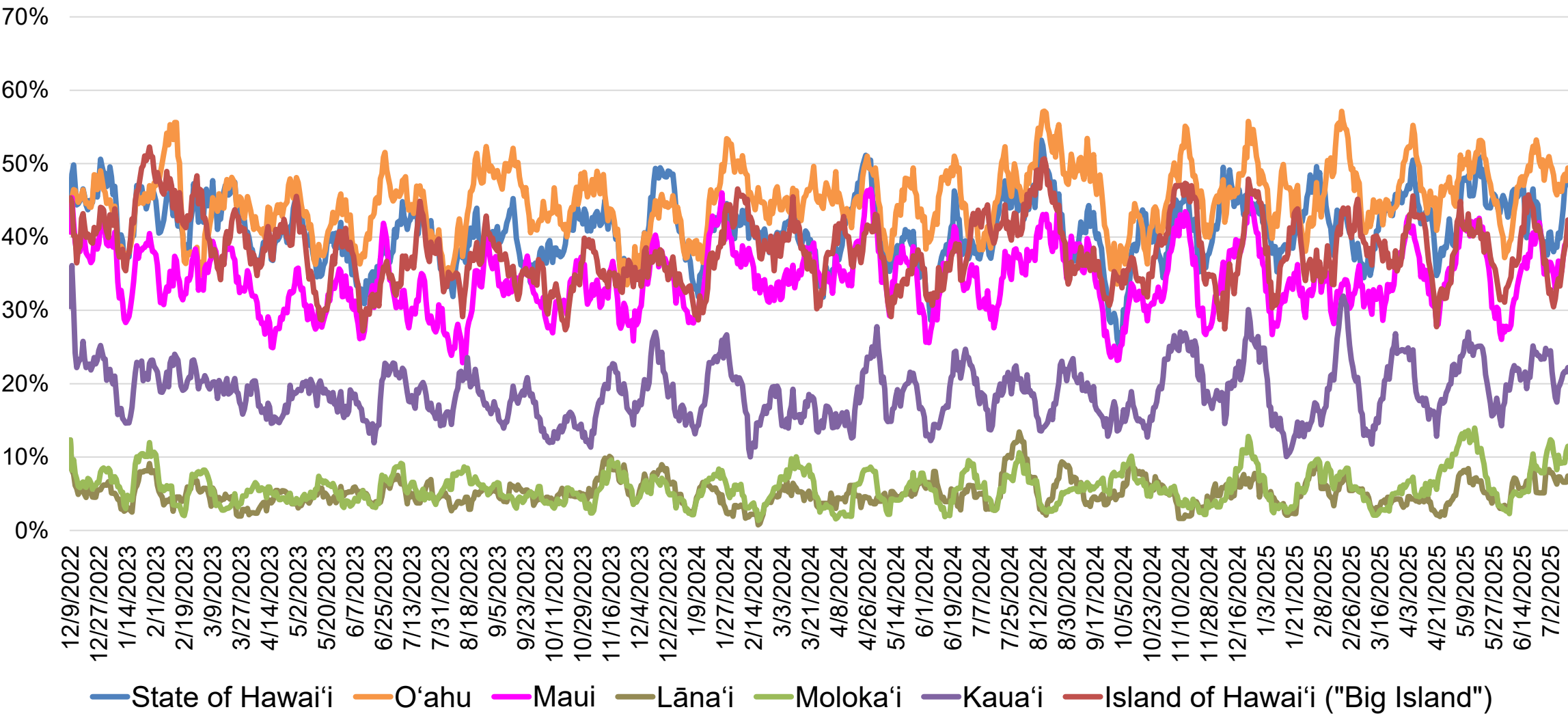


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# **Japan Destination Brand Health Trends**

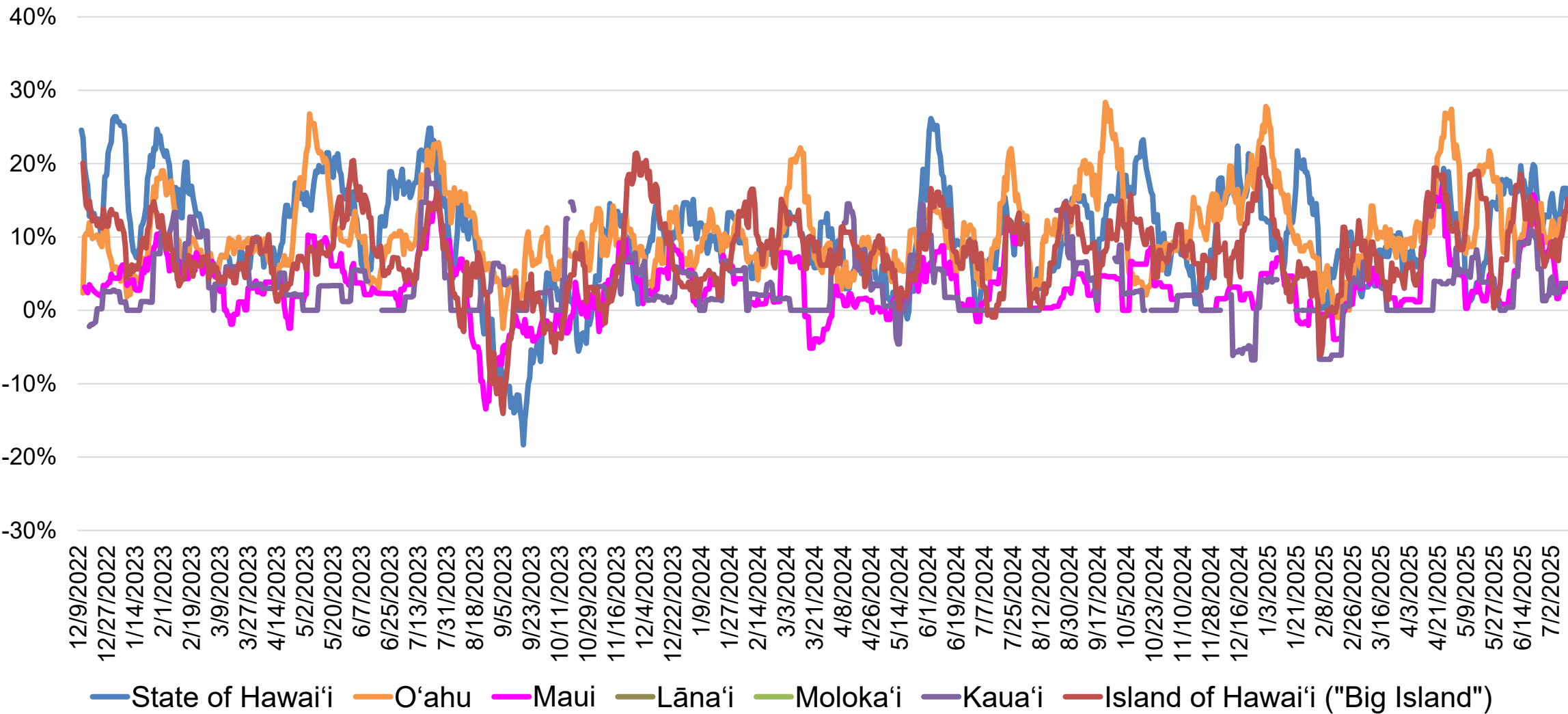


# Japan Destination Awareness Two-Week Moving Average



Source: Vision Insights Data as of July 15, 2025

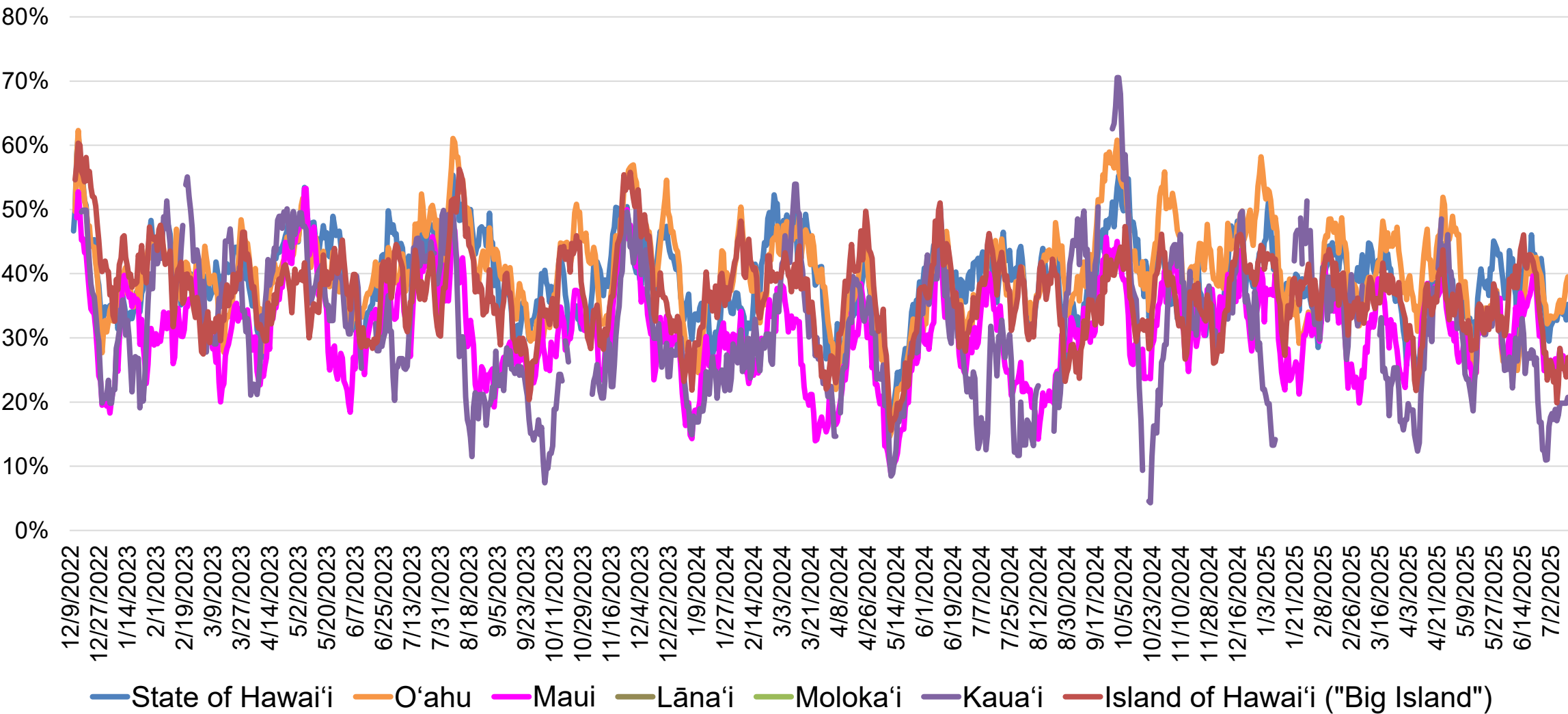
# Japan Chatter (Net) Two-Week Moving Average



Source: Vision Insights Data as of July 15, 2025  
Samples for Kaua'i, Moloka'i and Lāna'i are small

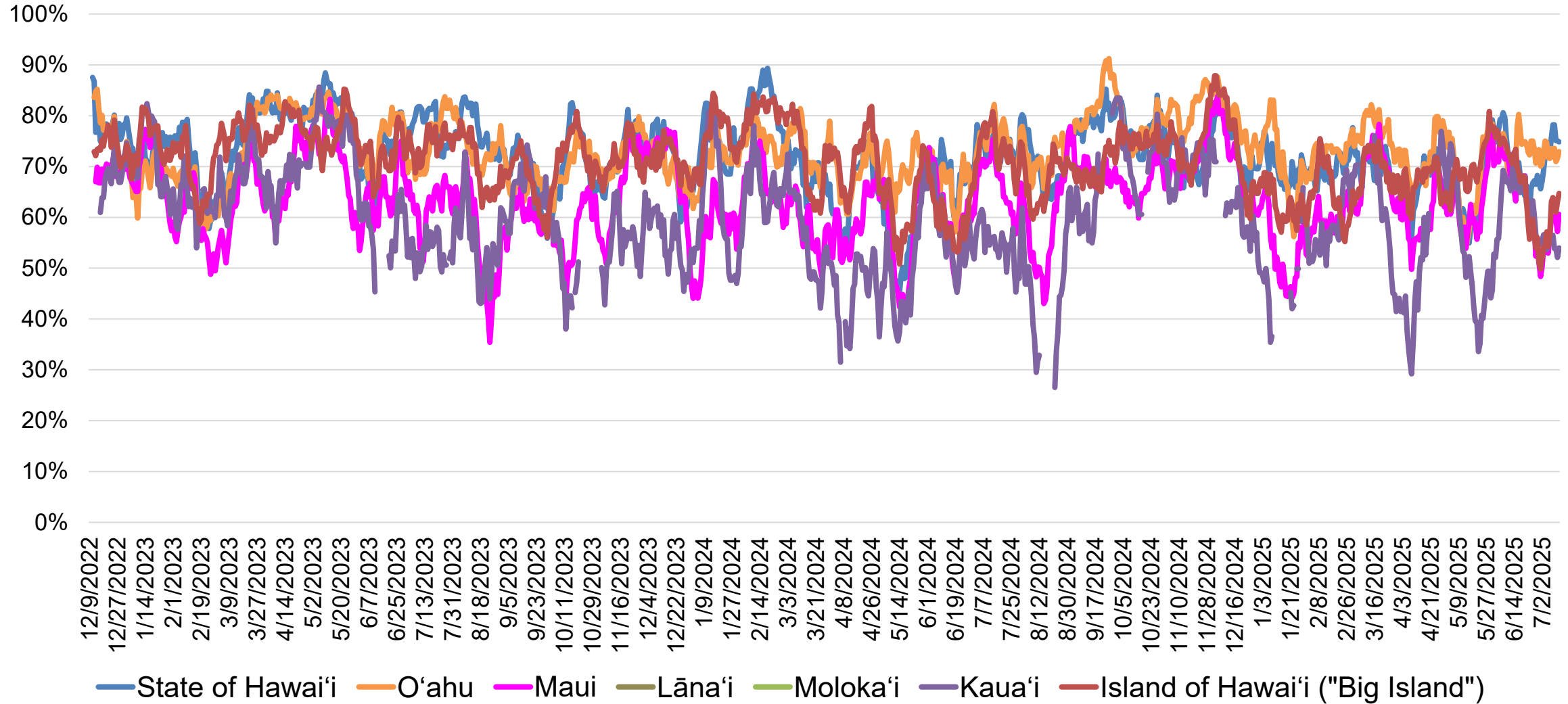


# Japan Consideration Two-Week Moving Average



Source: Vision Insights Data as of July 15, 2025  
Samples for Kaua'i, Moloka'i and Lāna'i are small

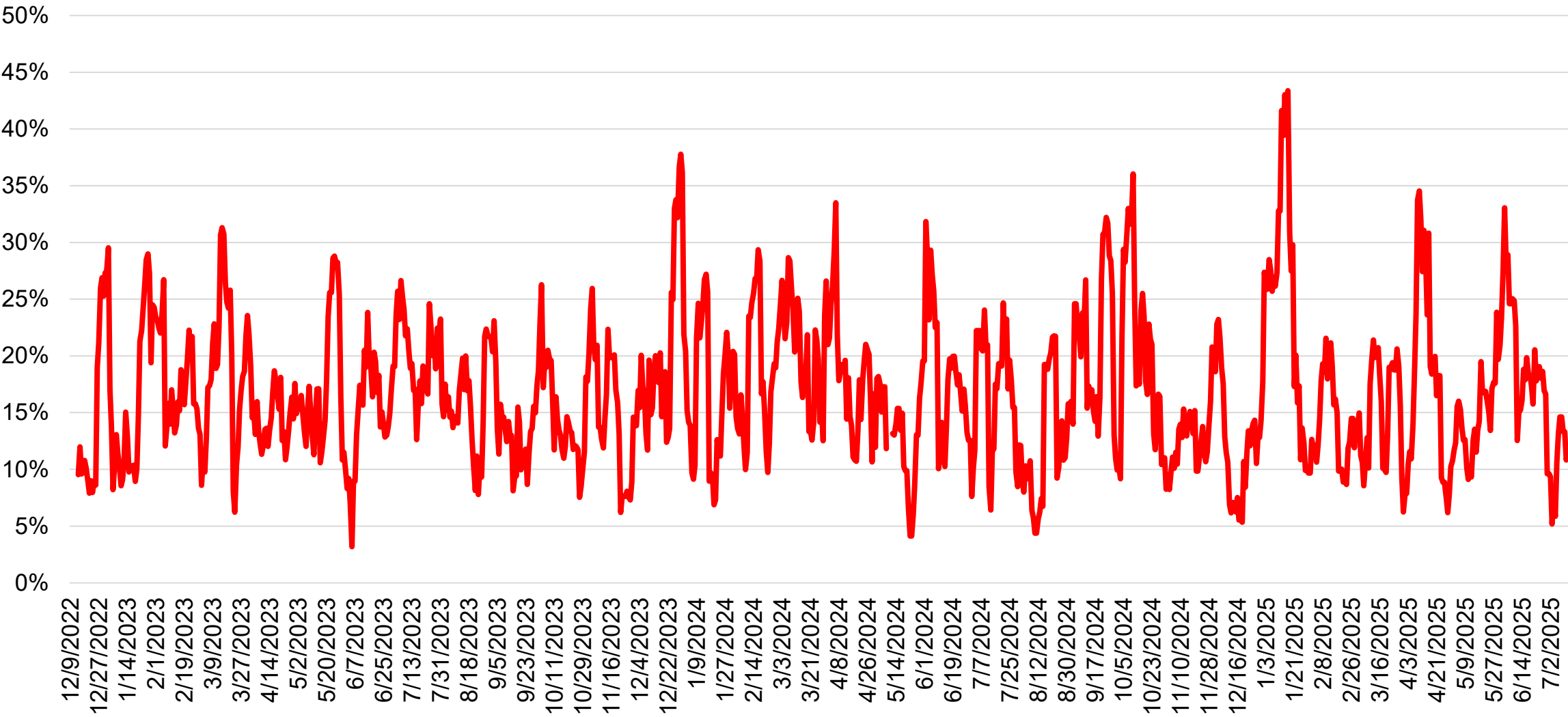
# Japan Favorability Two-Week Moving Average



Source: Vision Insights Data as of July 15, 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 July 15, 2025

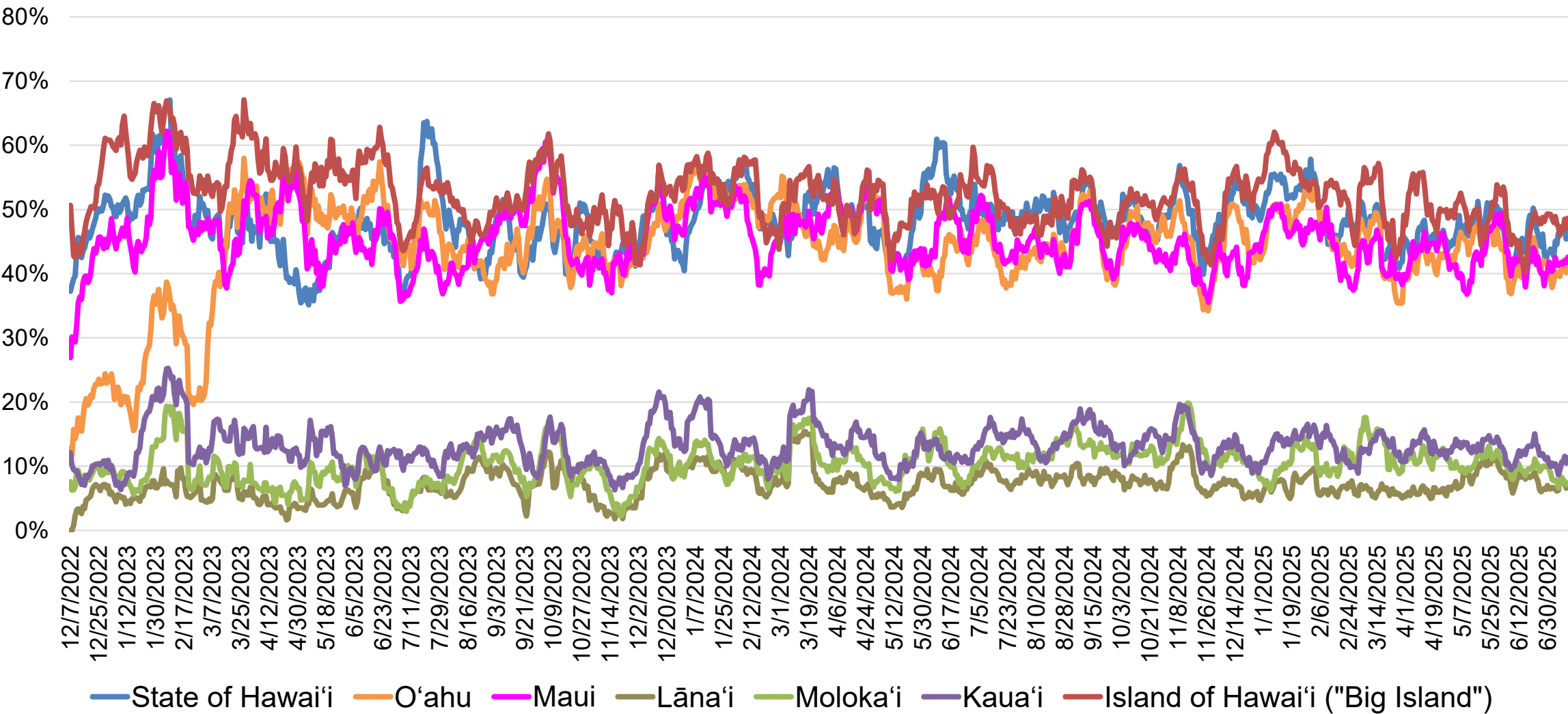


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# **Australia Destination Brand Health Trends**

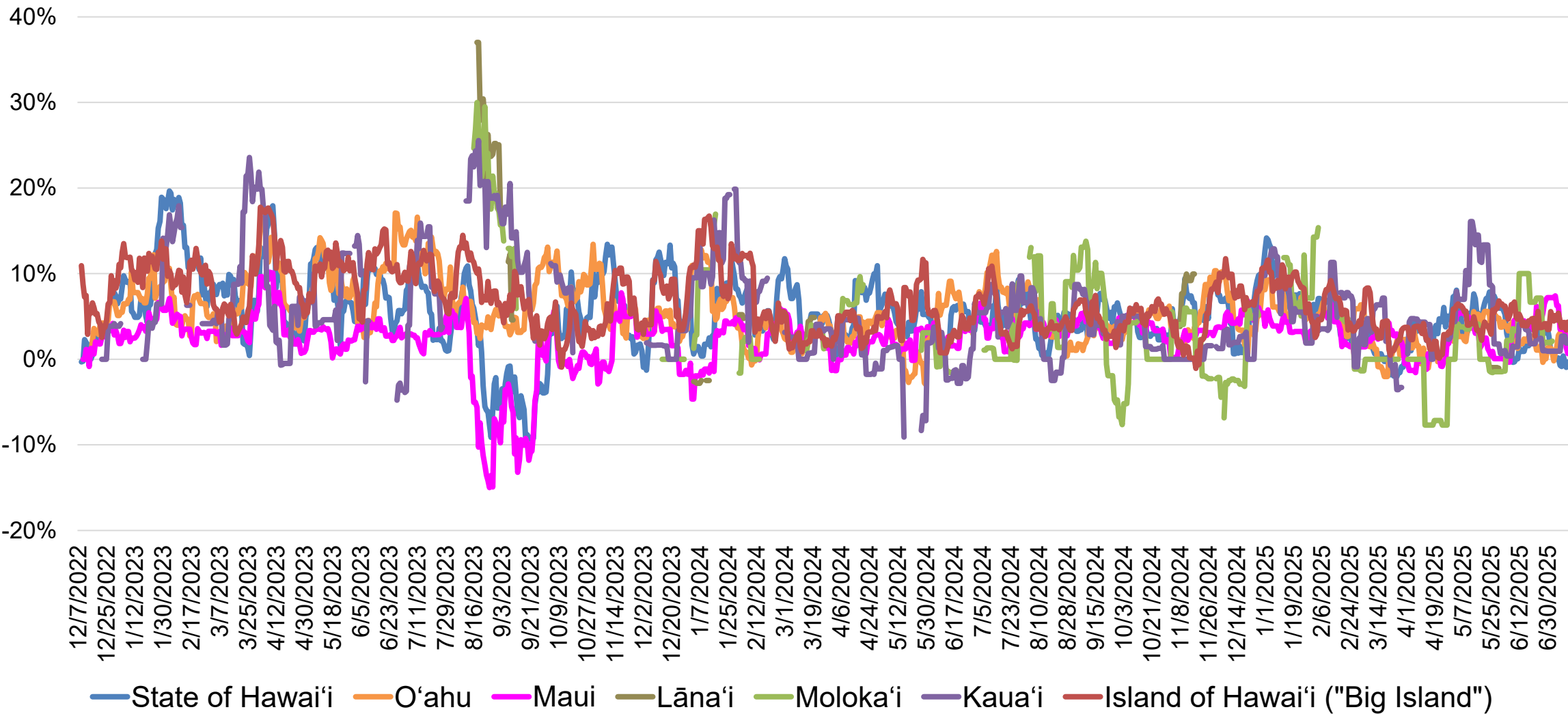


# Australia Destination Awareness Two-Week Moving Average



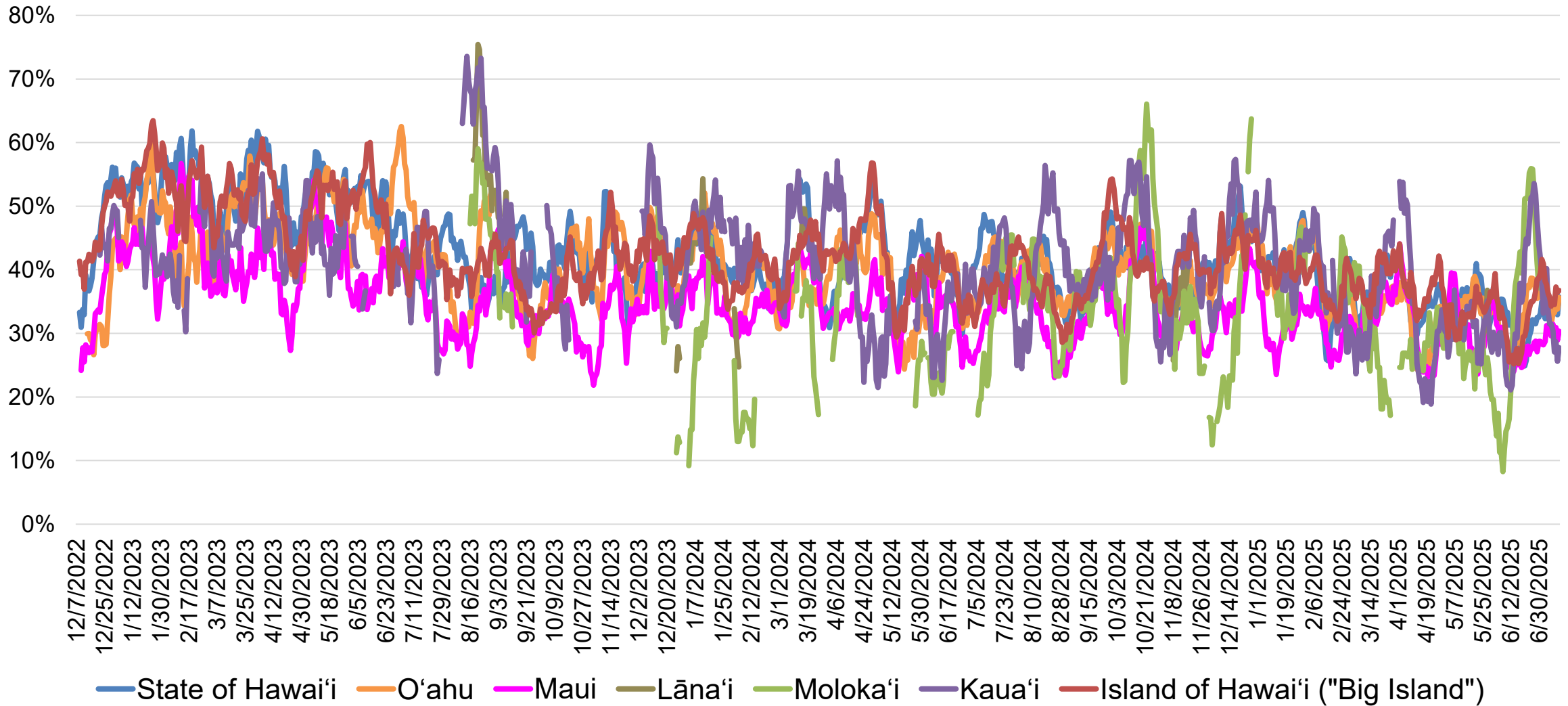
Source: Vision Insights Data as of July 15, 2025

# Australia Chatter (Net) Two-Week Moving Average



Source: Vision Insights Data as of July 15, 2025  
Samples for Kaua'i, Moloka'i, and Lāna'i are limited

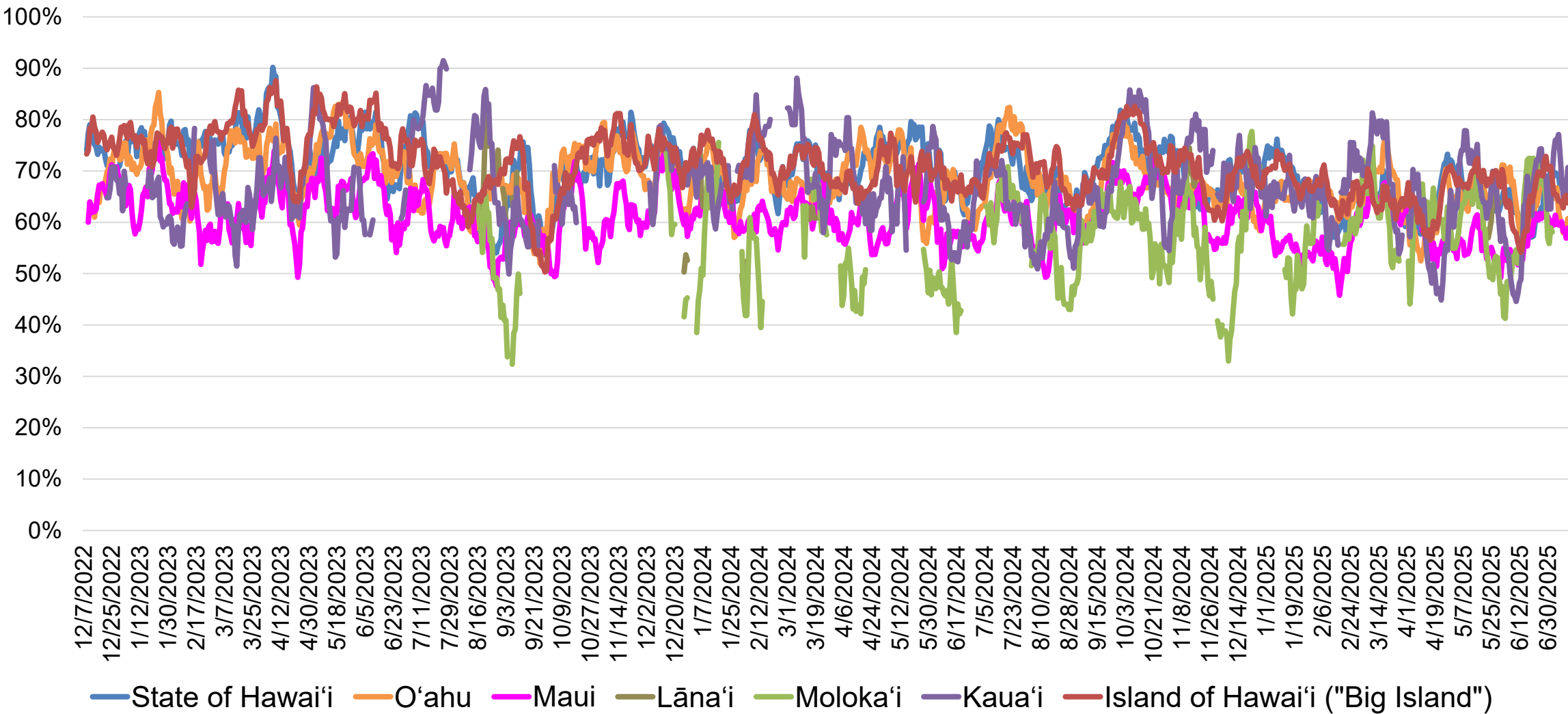
# Australia Consideration Two-Week Moving Average



Source: Vision Insights Data as of July 15, 2025  
Samples for Kaua'i, Moloka'i, and Lāna'i are limited



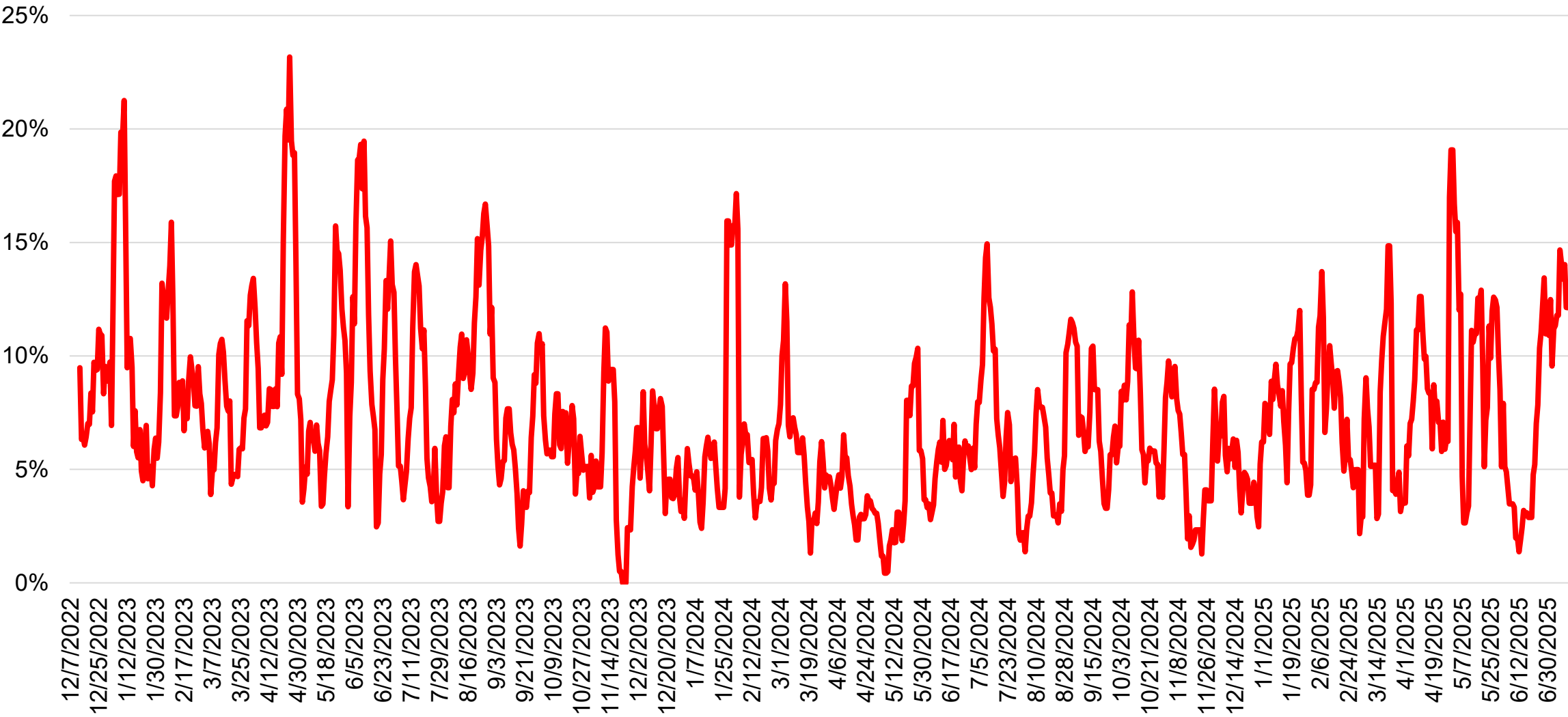
# Australia Favorability Two-Week Moving Average



Source: Vision Insights Data as of July 15, 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 July 15, 2025



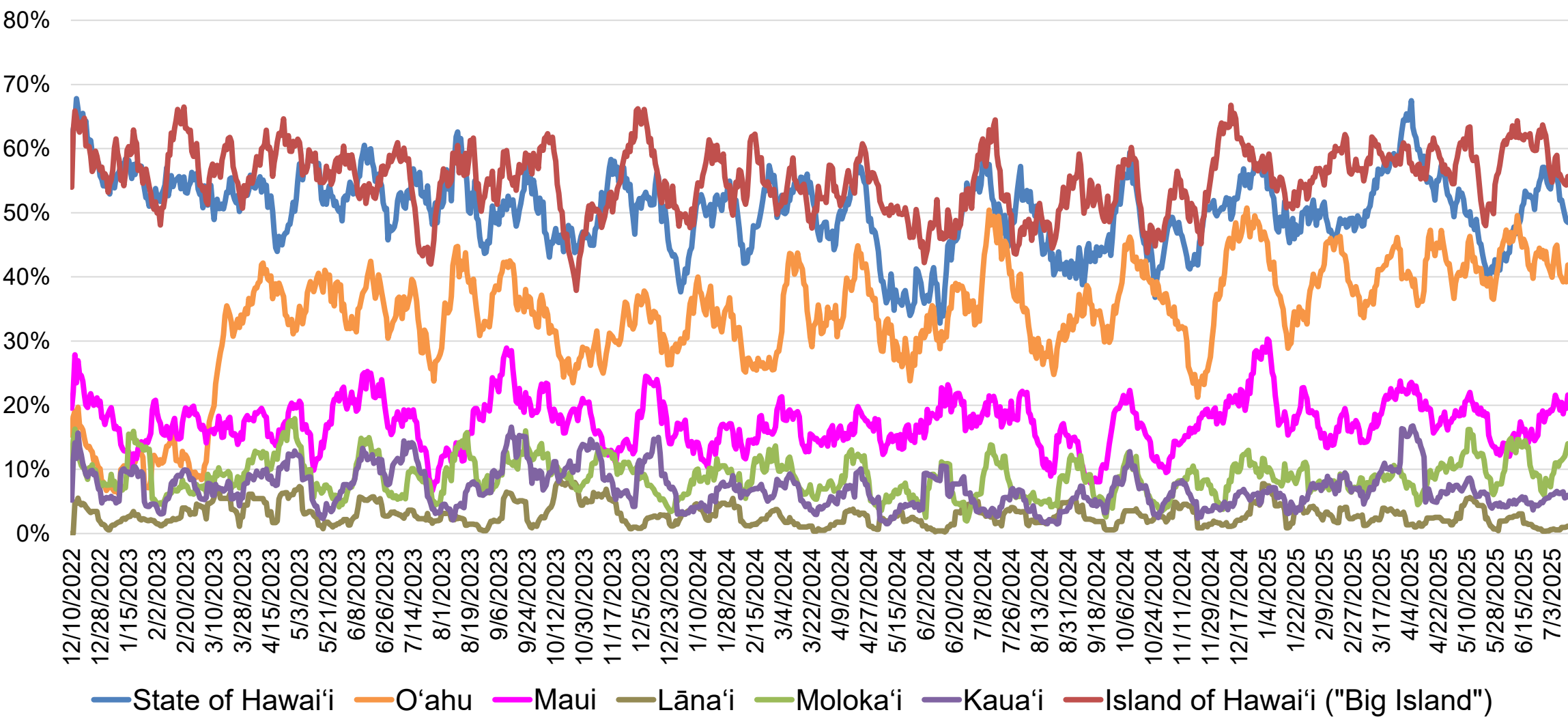
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# **Korea**

# **Destination Brand Health Trends**

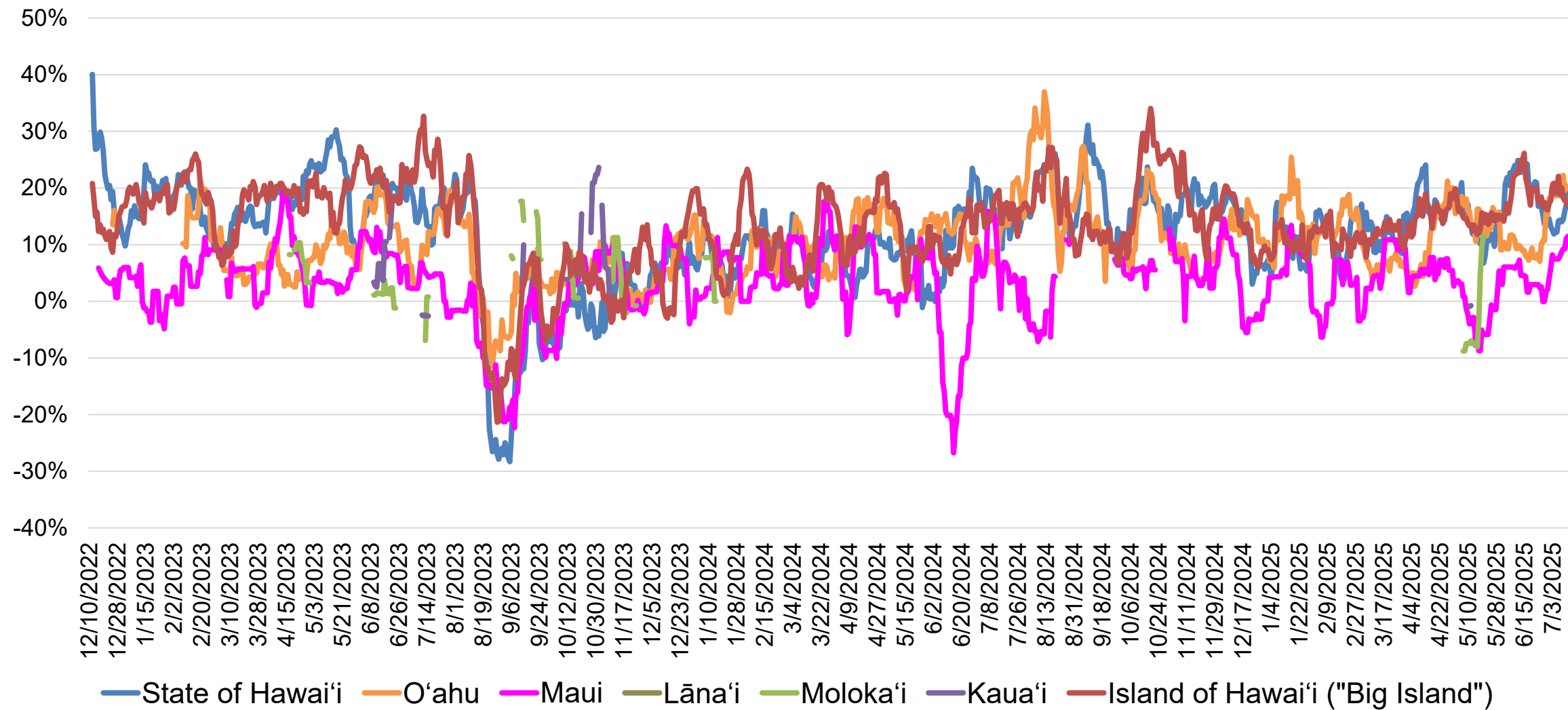


# Korea Destination Awareness Two-Week Moving Average



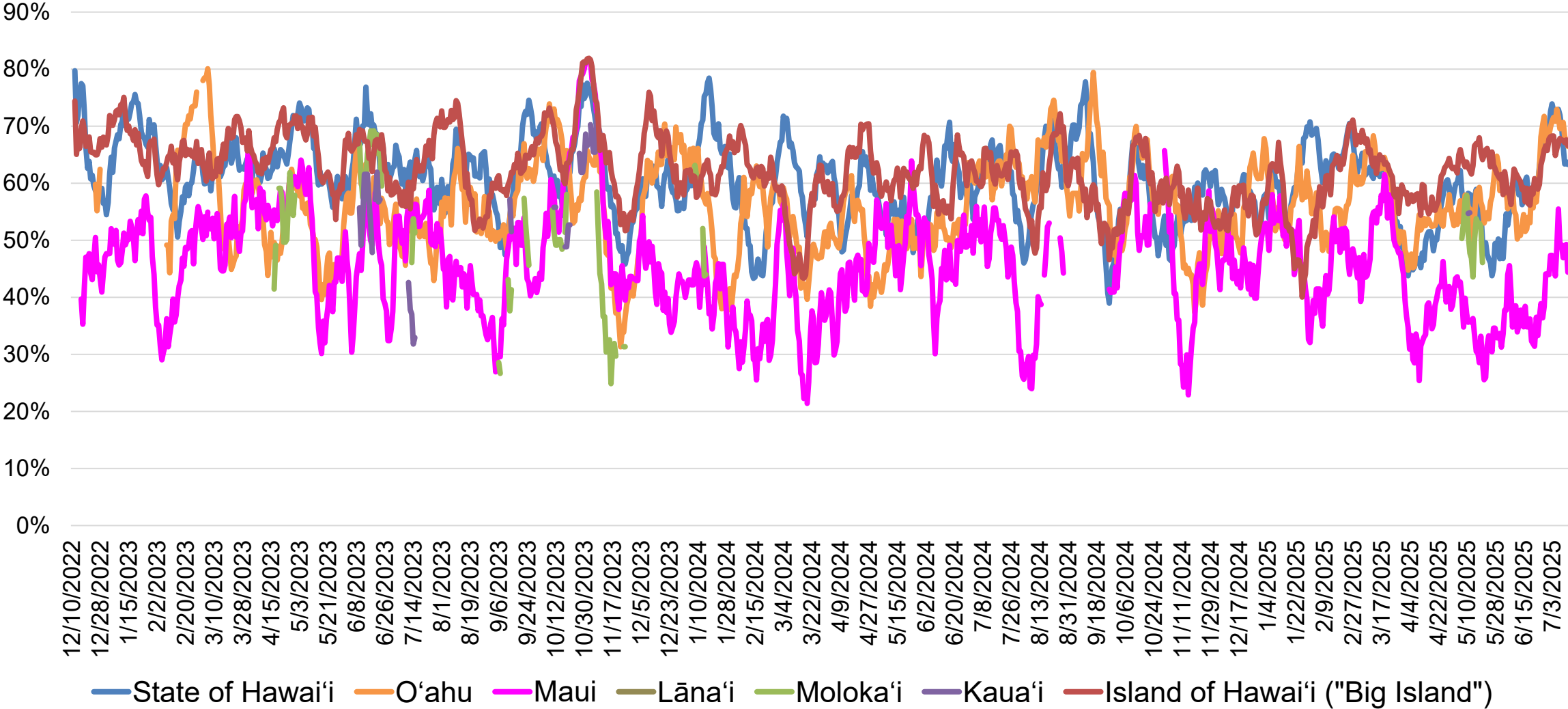
Source: Vision Insights Data as of July 15, 2025

# Korea Chatter (Net) Two-Week Moving Average



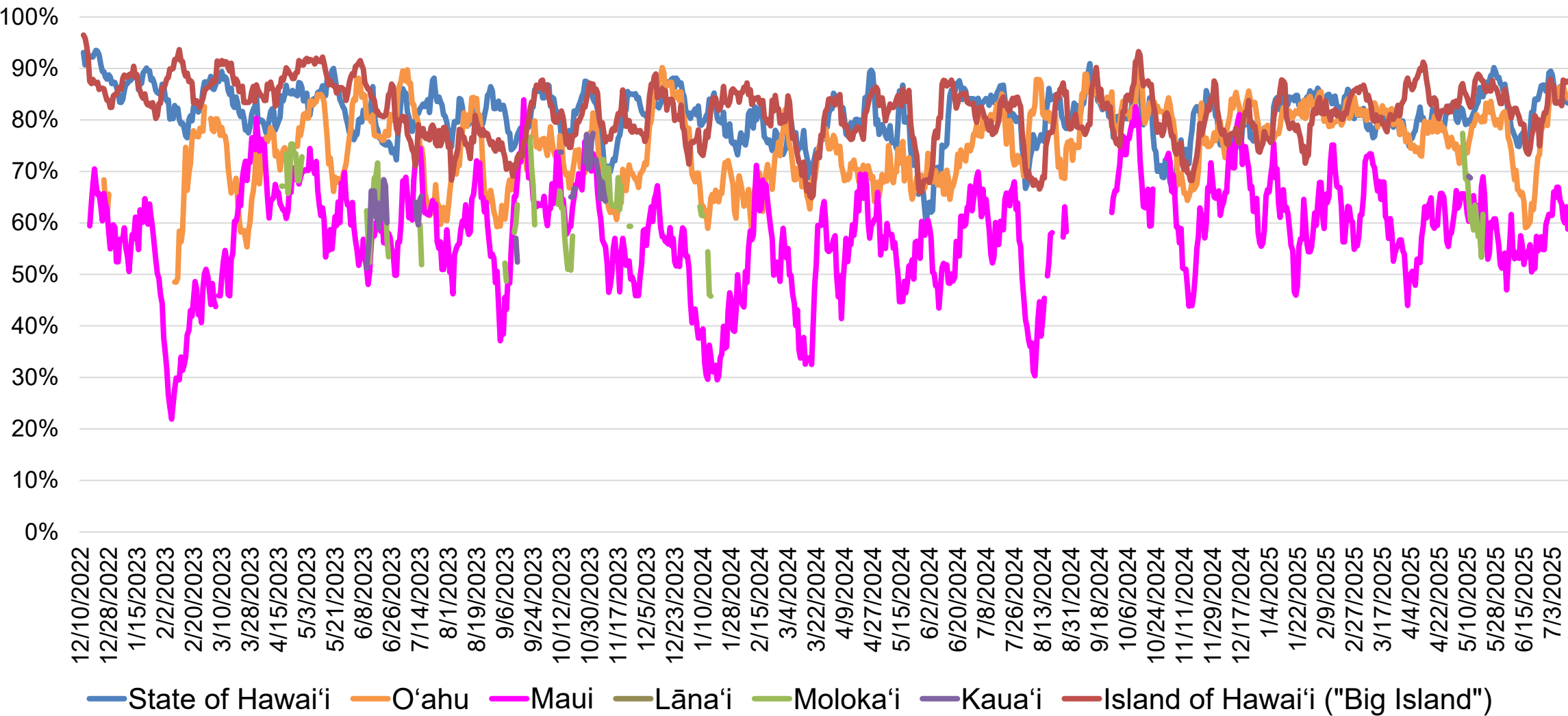
Source: Vision Insights Data as of July 15, 2025  
Samples for O'ahu, Maui, Kaua'i, Moloka'i, and Lāna'i are limited

# Korea Consideration Two-Week Moving Average



Source: Vision Insights Data as of July 15, 2025  
Samples for O'ahu, Maui, Kaua'i, Moloka'i, and Lāna'i are limited

# Korea Favorability Two-Week Moving Average

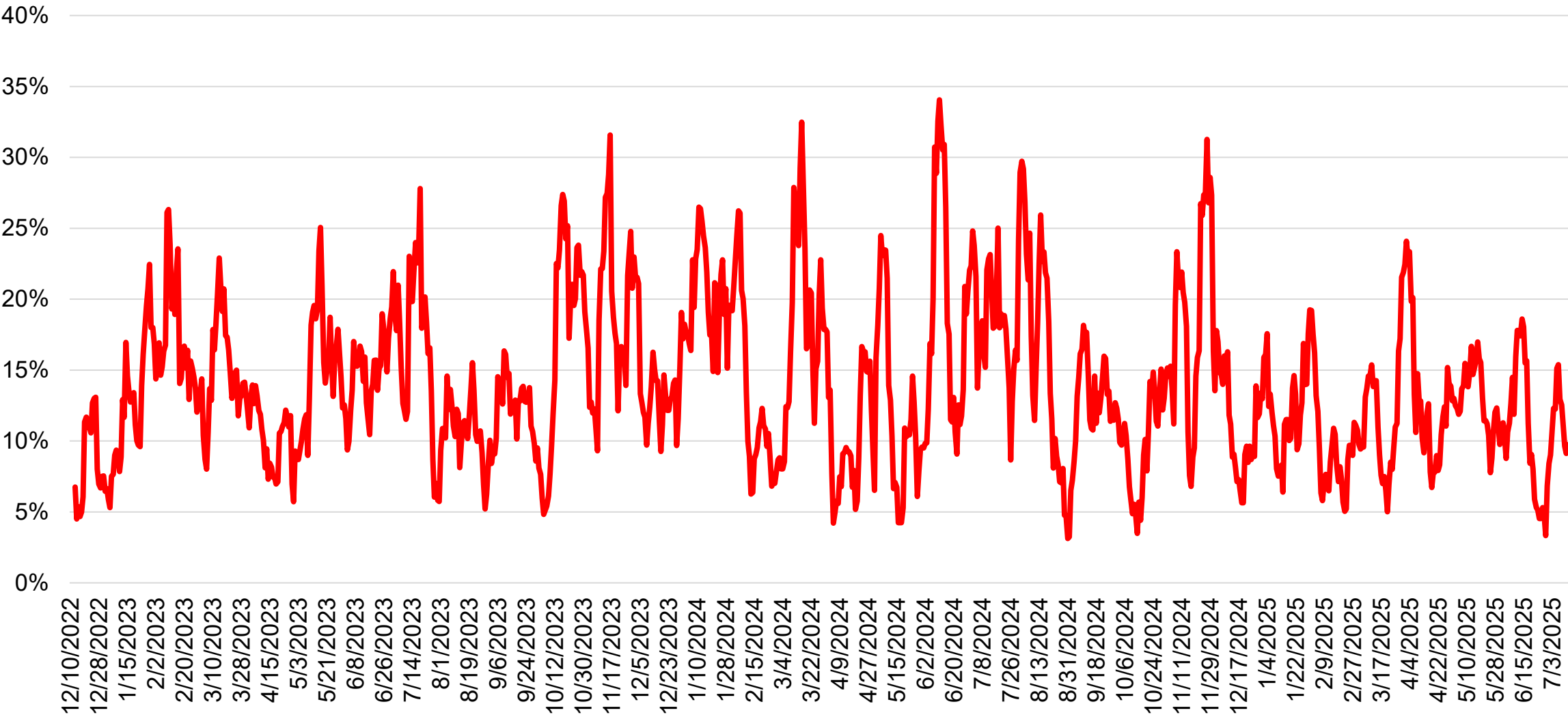


Source: Vision Insights Data as of July 15, 2025  
Samples for O'ahu, Maui, Kaua'i, Moloka'i, and Lāna'i are limited



# Korea Intent to Travel to Any Hawaiian Island

## One-Week Moving Average



Source: Vision Insights Data as of July 15, 2025