



Vision Insights Responsible Travelers Segment

March 31, 2023



Vision Insights Syndicated Survey

- DBEDT subscribes to Vision Insight's Responsible Travelers Segment databases for O'ahu, Maui, Kaua'i and Hawai'i Island.
- Consumers are surveyed each day
- DBEDT receives access to new data each week for daily responsible traveler metrics – media-focused, brand health, purchase/intent, and consumer status
- Responsible Traveler Segment
 - Respondents who self-identify as responsible travelers (i.e., wellness focused, environmental impact, culturally minded)

Vision Insights Metrics

- **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
- **Personal Discussion:** Percentage of people who have discussed the destination with friends and family in the past two weeks
- **Recommendation:** Percentage of people who are very likely to recommend the destination to a family, friend, or colleague
- **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)

Destinations

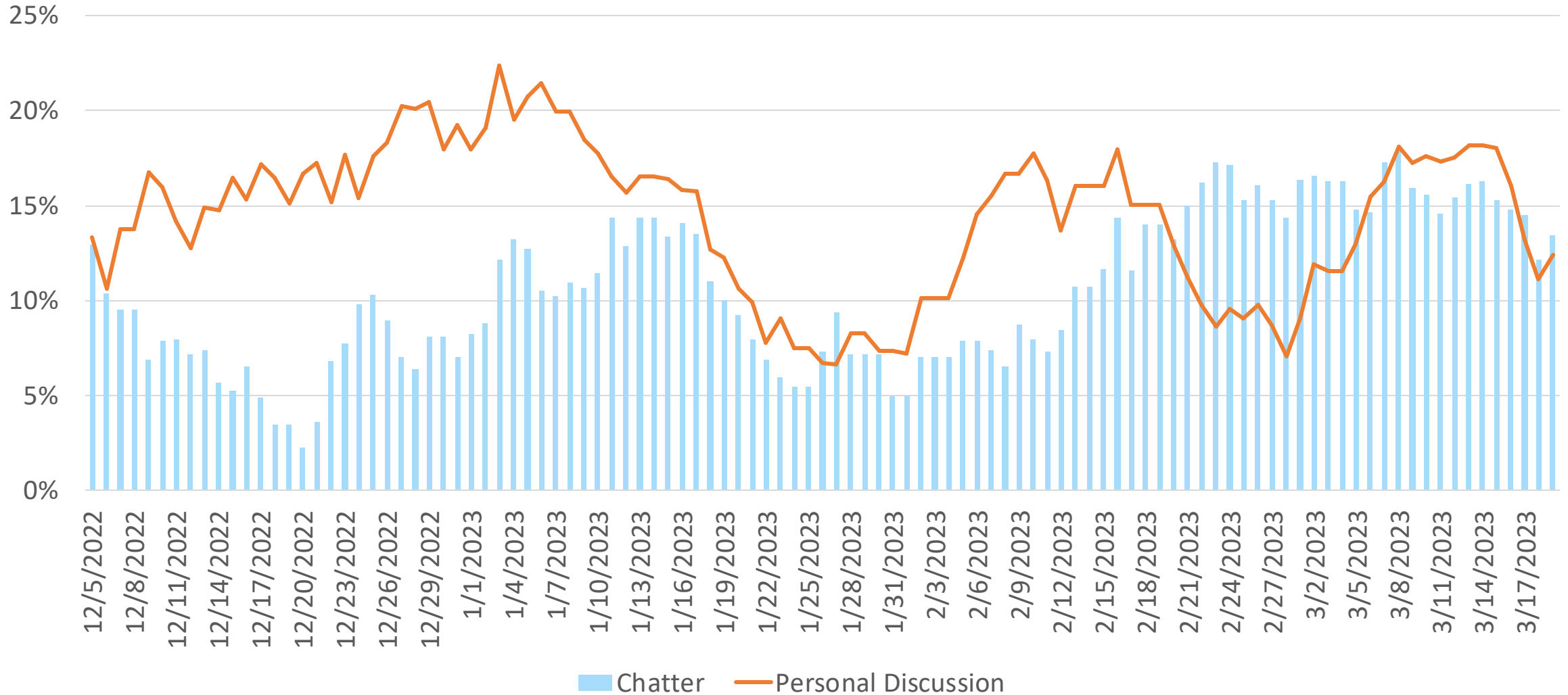
- Respondents are asked about:
 - O‘ahu
 - Maui
 - Kaua‘i
 - Hawai‘i Island
- Selecting a Hawaiian island indicates respondents’ chatter/personal discussion/recommendation/consideration/favorability for that specific Hawaiian island’s brand (the concept of a beautiful place called “Hawai‘i”) and lack of familiarity with individual islands



United States Responsible Travelers Segment O'ahu



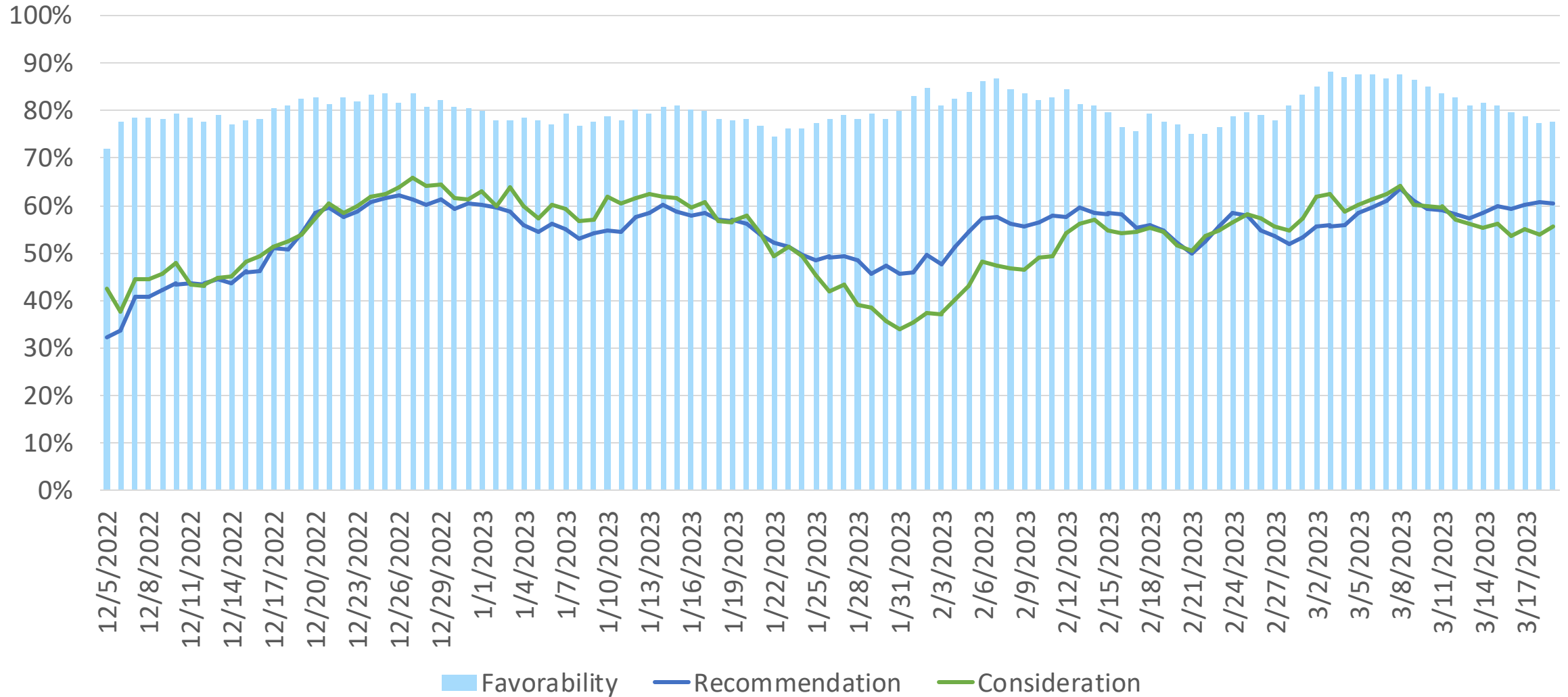
O'ahu – Chatter (Net) and Personal Discussion U.S. Two-Week Moving Average



Source: Vision Insights Data as of March 31, 2023

O'ahu – Recommendation, Consideration and Favorability

U.S. Two-Week Moving Average



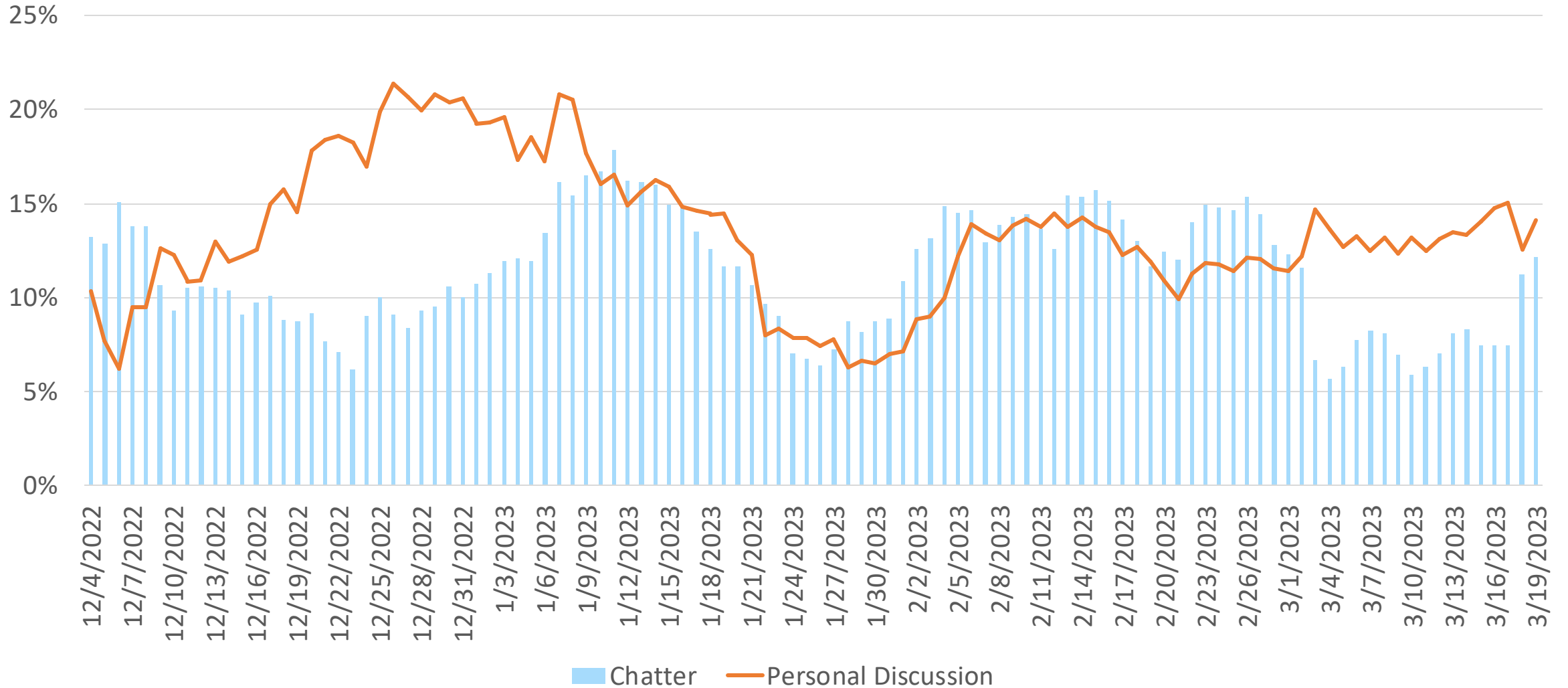
Source: Vision Insights Data as of March 31, 2023



United States Responsible Travelers Segment Maui



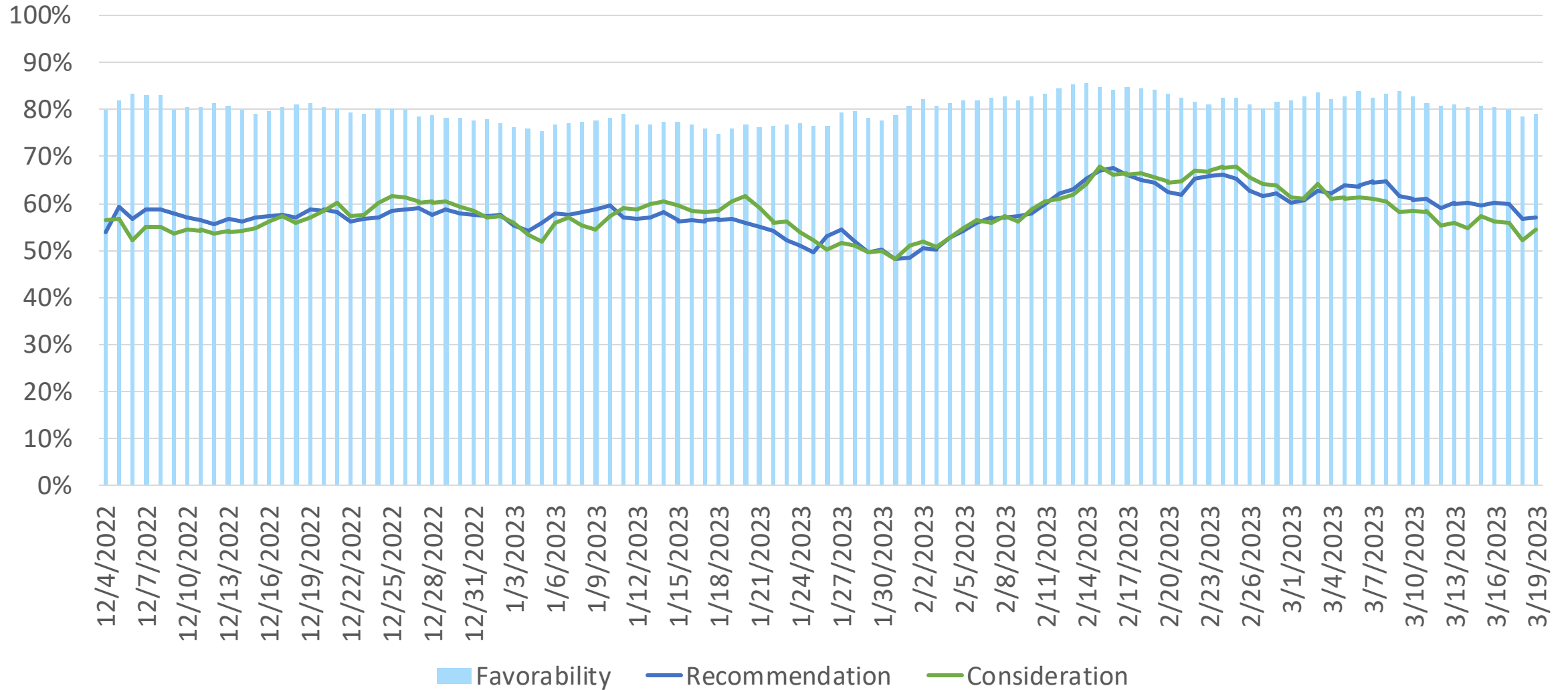
Mauí – Chatter (Net) and Personal Discussion U.S. Two-Week Moving Average



Source: Vision Insights Data as of March 31, 2023

Maui – Recommendation, Consideration and Favorability

U.S. Two-Week Moving Average



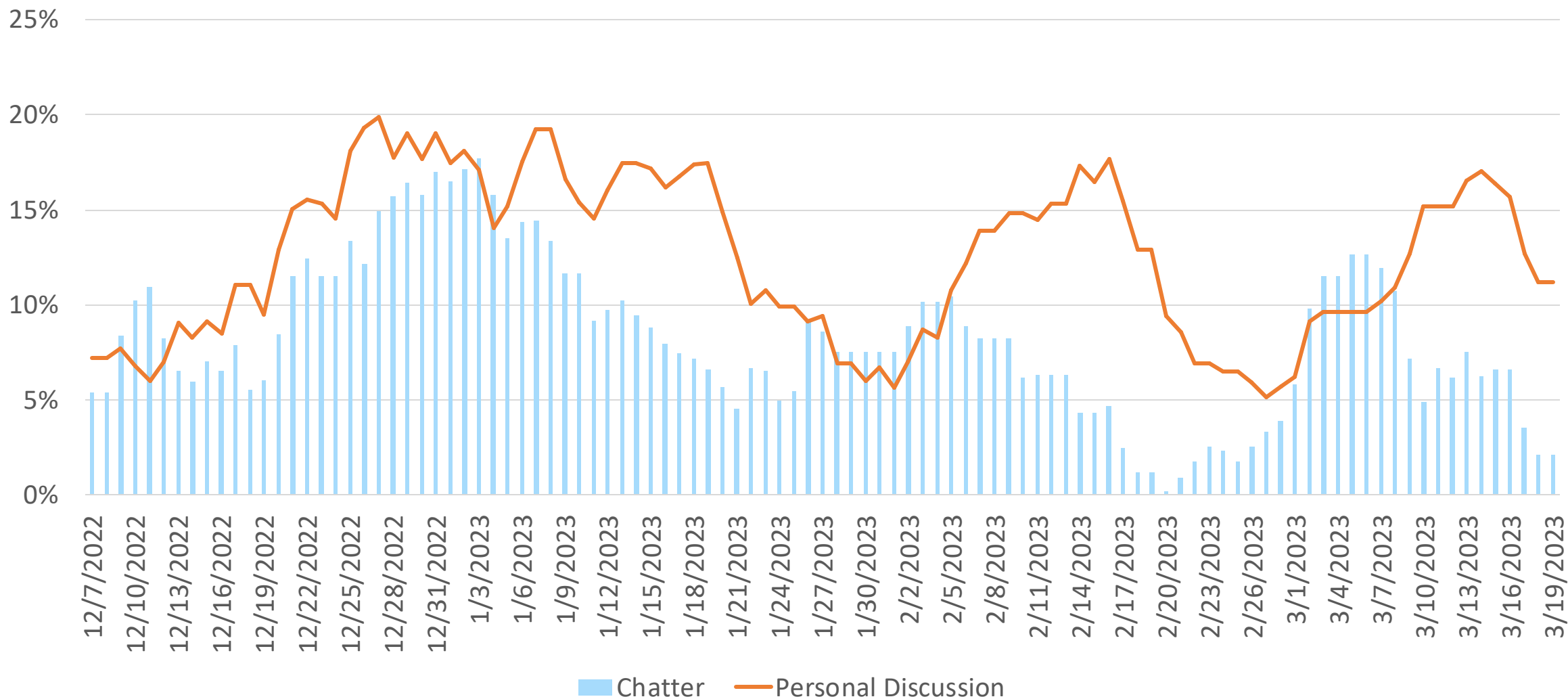
Source: Vision Insights Data as of March 31, 2023



United States Responsible Travelers Segment Kaua'i



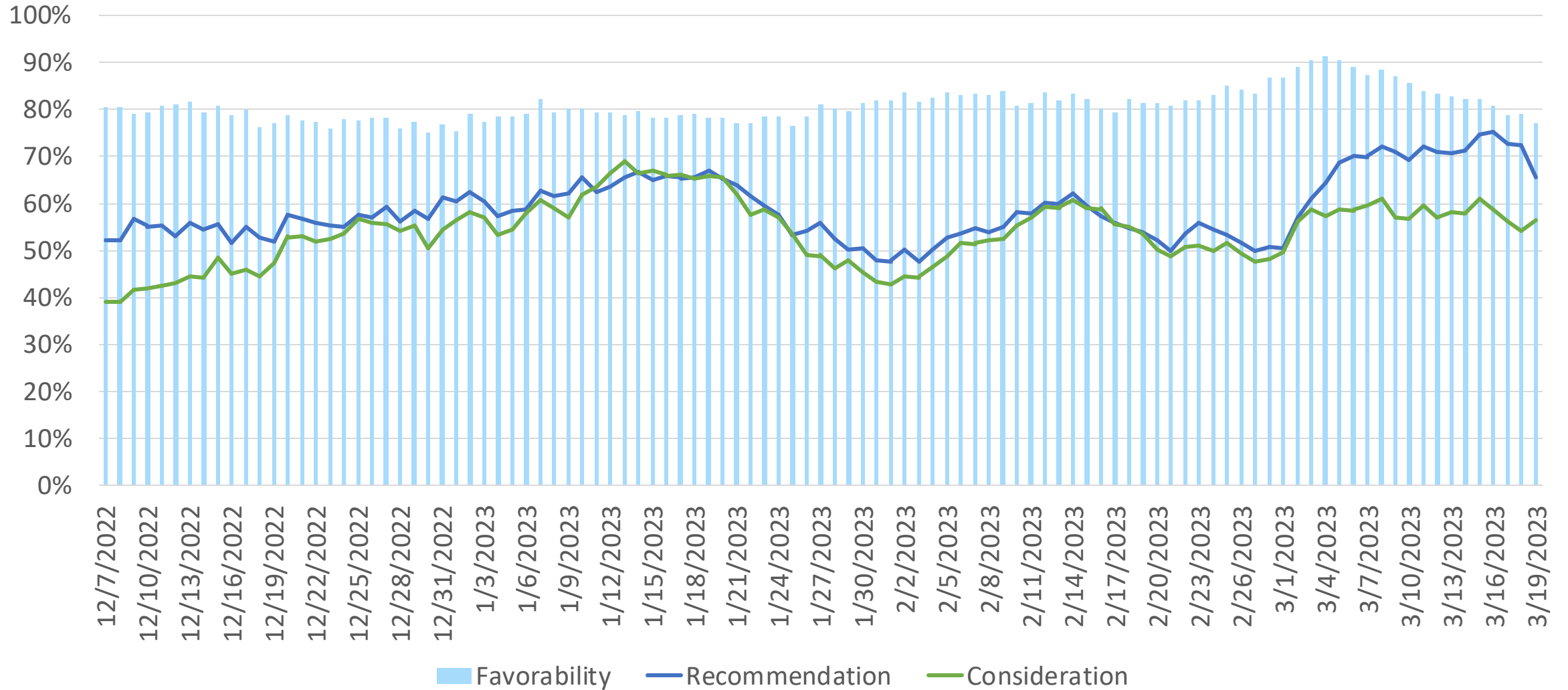
Kaua'i – Chatter (Net) and Personal Discussion U.S. Two-Week Moving Average



Source: Vision Insights Data as of March 31, 2023

Kaua'i – Recommendation, Consideration and Favorability

U.S. Two-Week Moving Average



Source: Vision Insights Data as of March 31, 2023

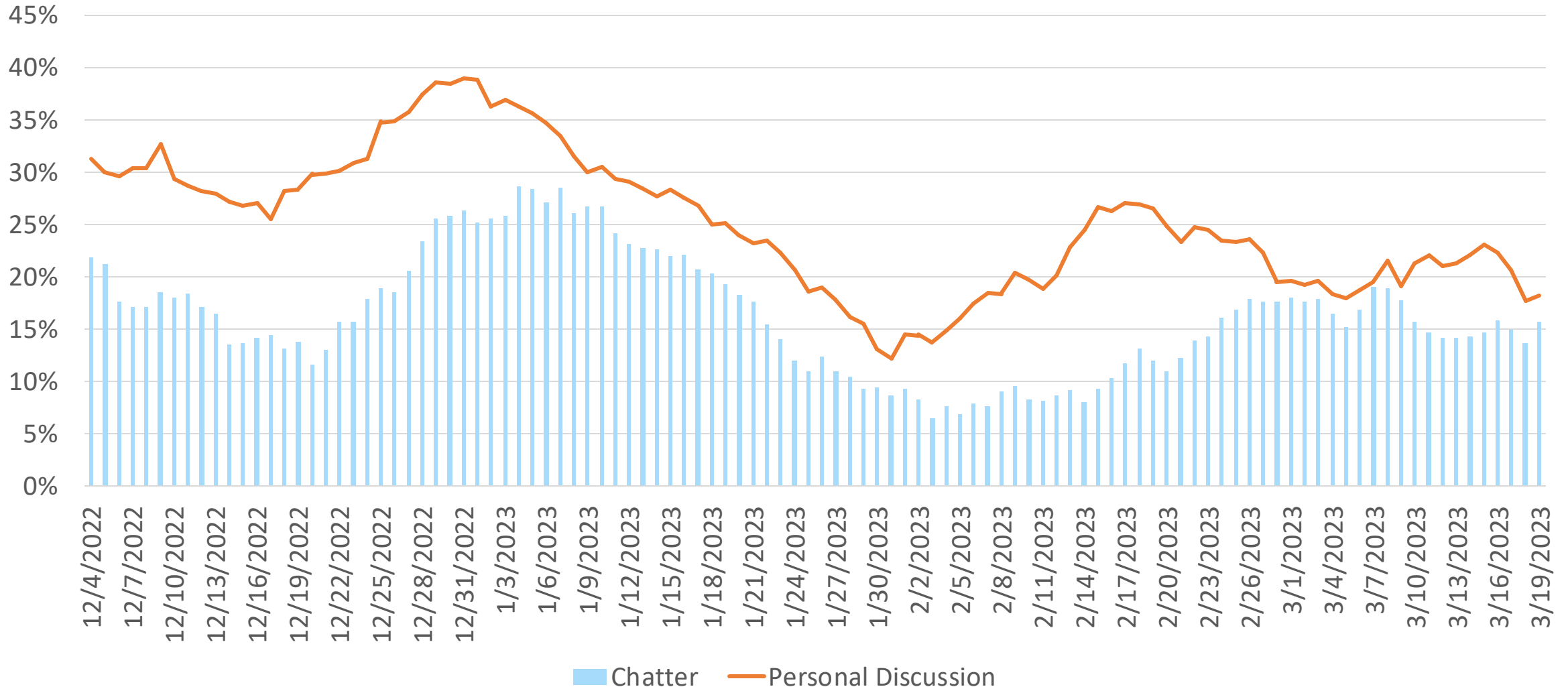
*Samples for Moloka'i and Lāna'i are small



United States Responsible Travelers Segment Hawai'i Island



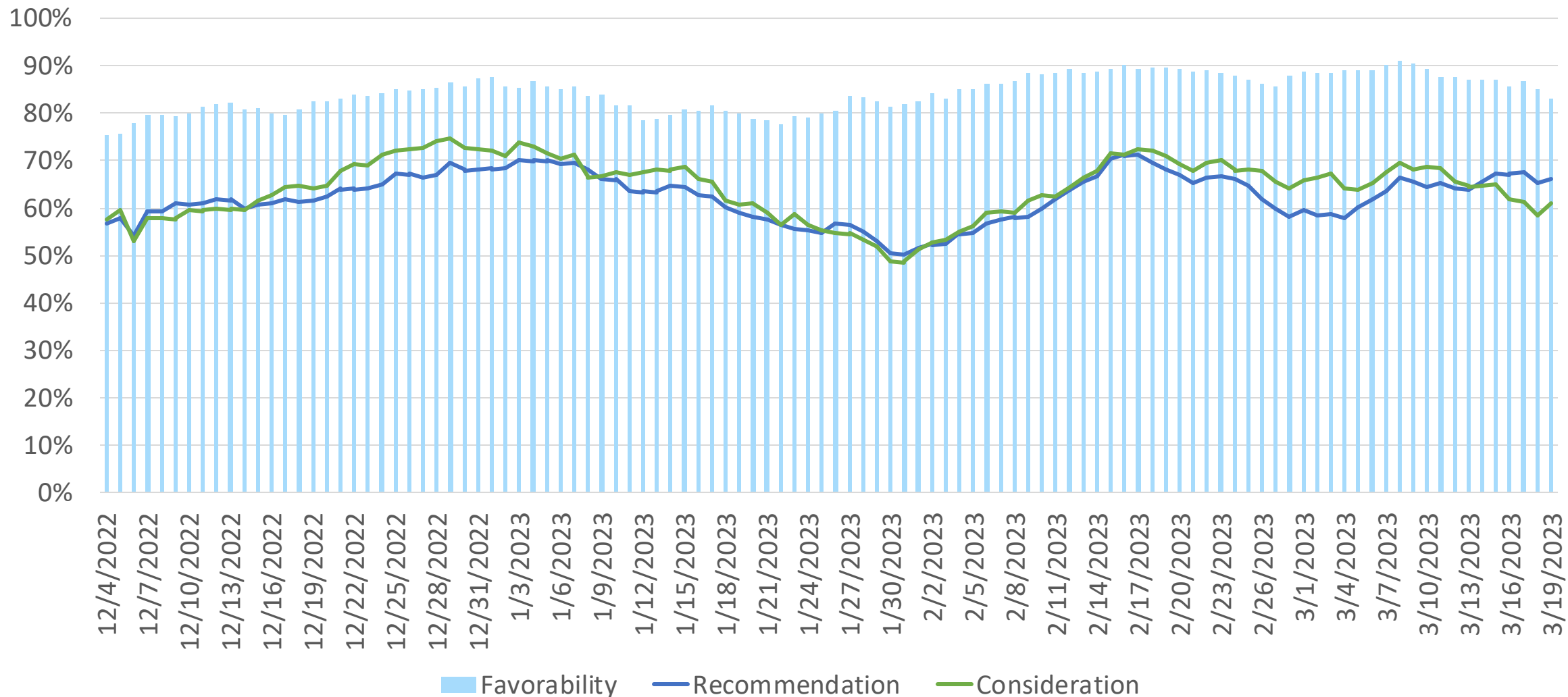
Hawai'i Island – Chatter (Net) and Personal Discussion U.S. Two-Week Moving Average



Source: Vision Insights Data as of March 31, 2023

Hawai'i Island – Recommendation, Consideration and Favorability

U.S. Two-Week Moving Average



Source: Vision Insights Data as of March 31, 2023
 Samples for Kaua'i, Moloka'i, and Lāna'i are limited