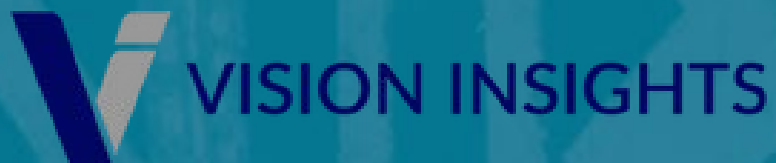




Vision Insights Destination Brand Health Trends

March 15, 2023



Vision Insights Syndicated Survey

- DBEDT subscribes to Vision Insight's Brand Health and Profiles databases for the U.S., Japan, Canada, Australia, and Korea
- Consumers are surveyed each day
- 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)

Destinations

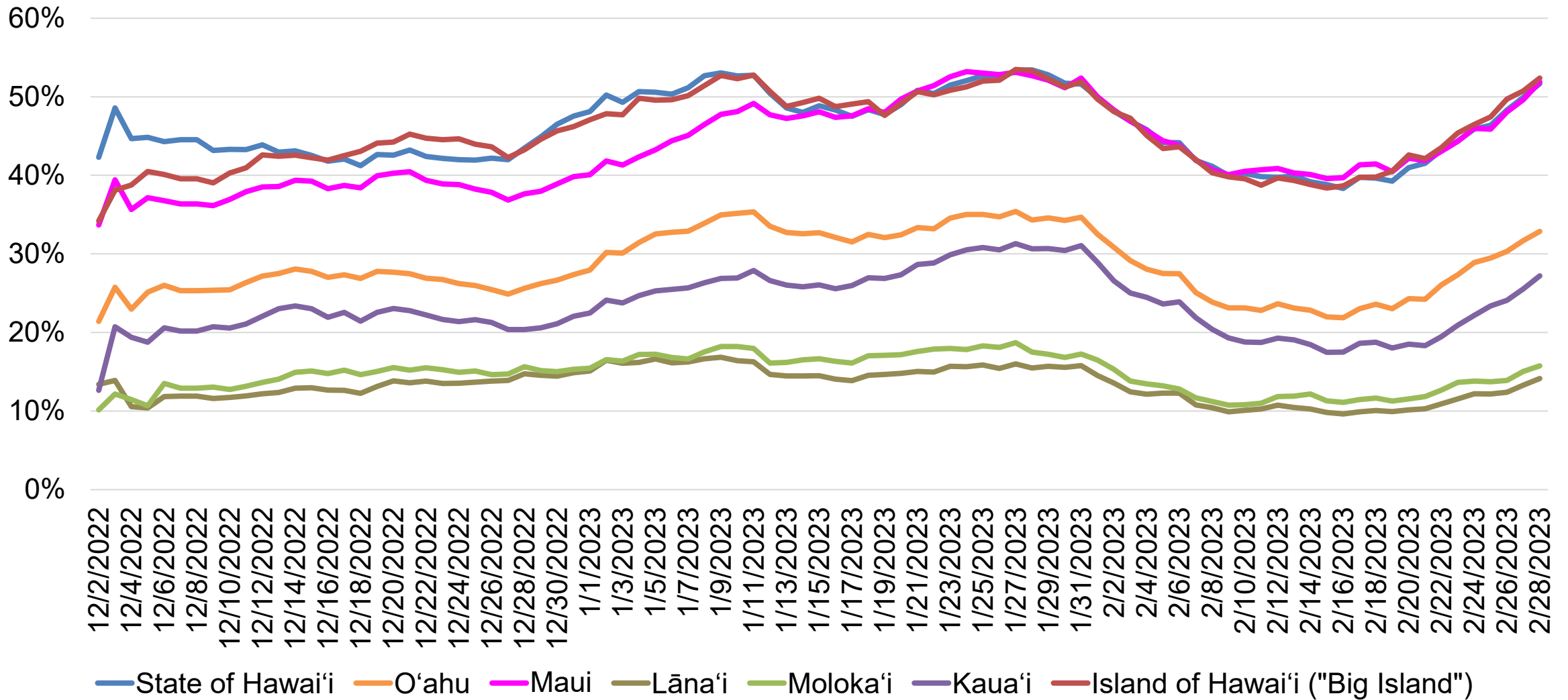
- Respondents are asked about:
 - State of Hawai‘i
 - O‘ahu
 - Maui
 - Lāna‘i
 - Moloka‘i
 - Kaua‘i
 - Hawai‘i Island
- Selecting State of Hawai‘i indicates respondents’ awareness/chatter/consideration/favorability for the overall Hawai‘i brand (the concept of a beautiful place called “Hawai‘i”) and lack of familiarity with individual islands



United States Destination Brand Health Trends



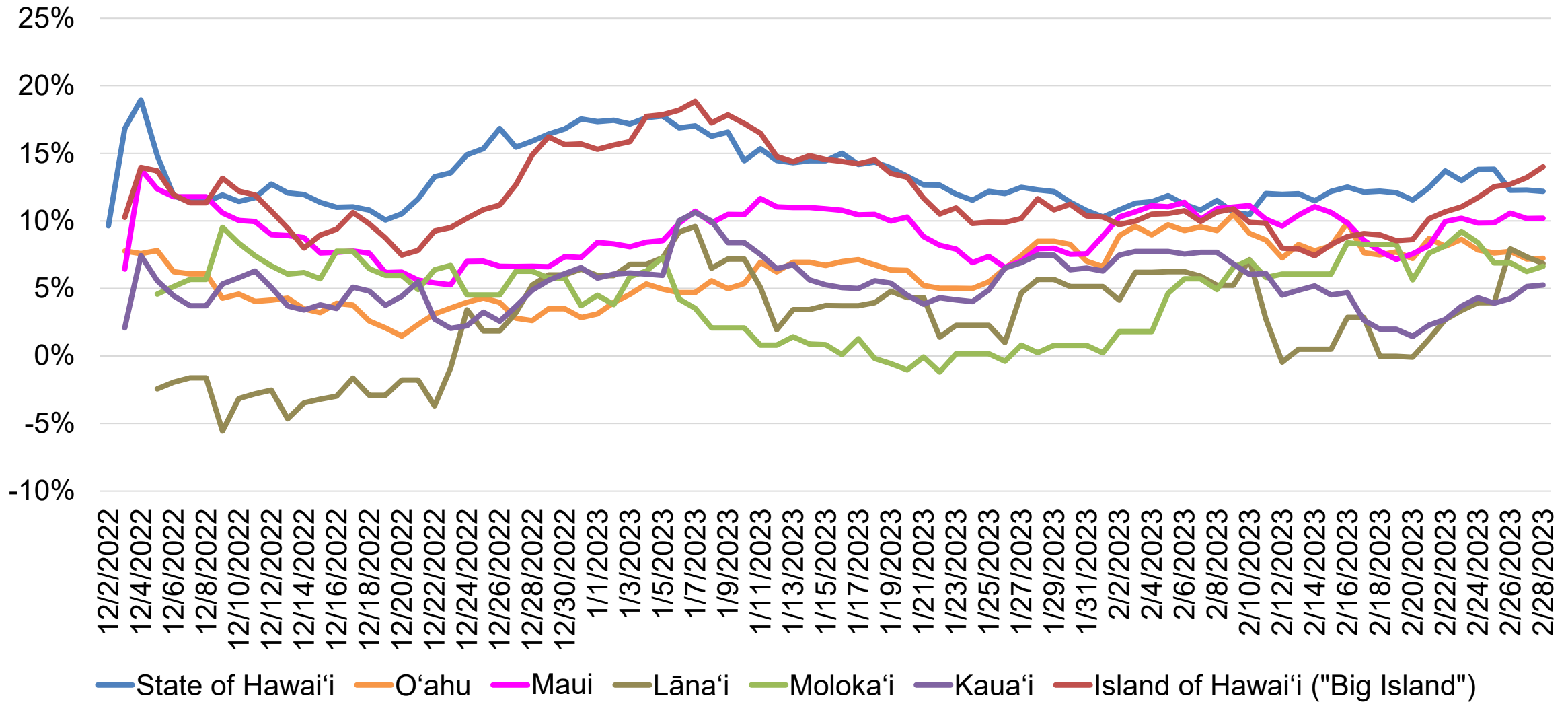
U.S. Destination Awareness Two-Week Moving Average



Source: Vision Insights Data as of March 15, 2023

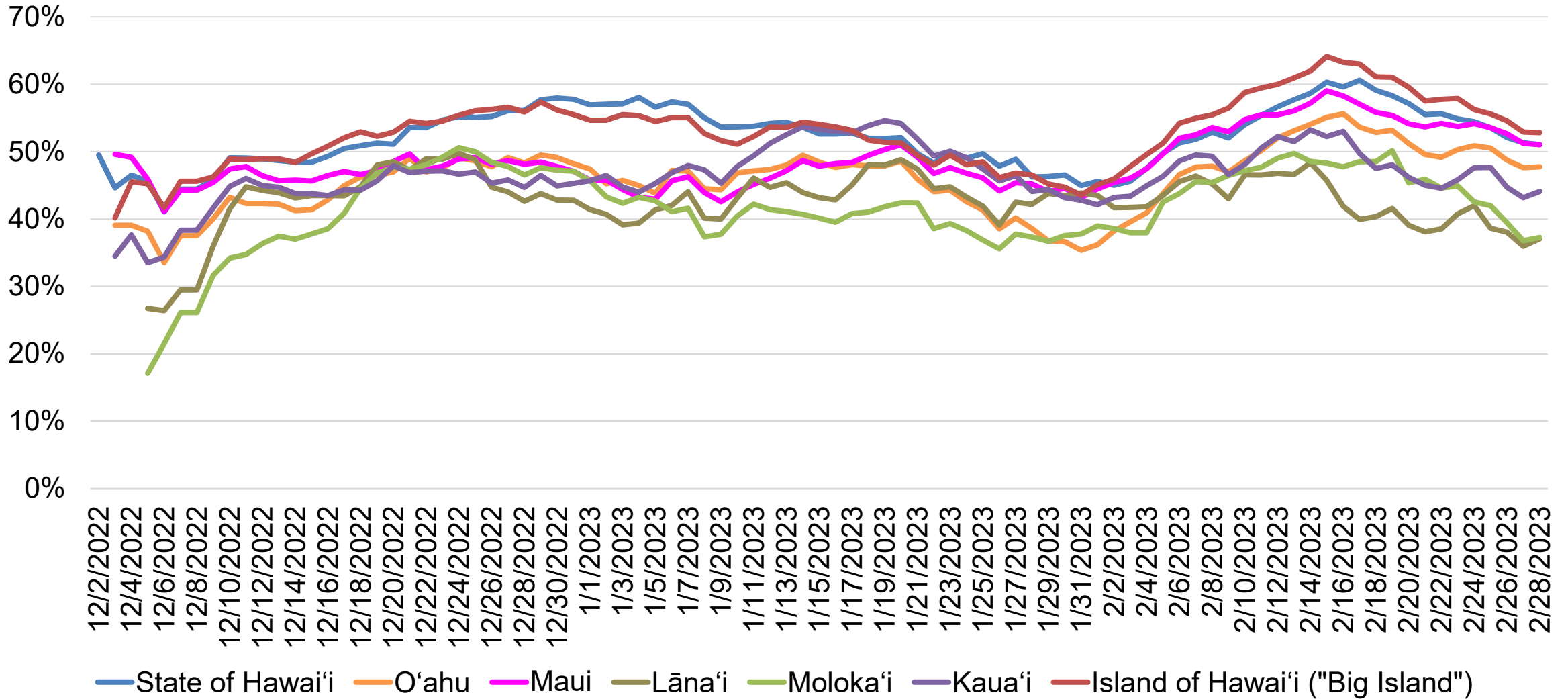


U.S. Chatter (Net) Two-Week Moving Average



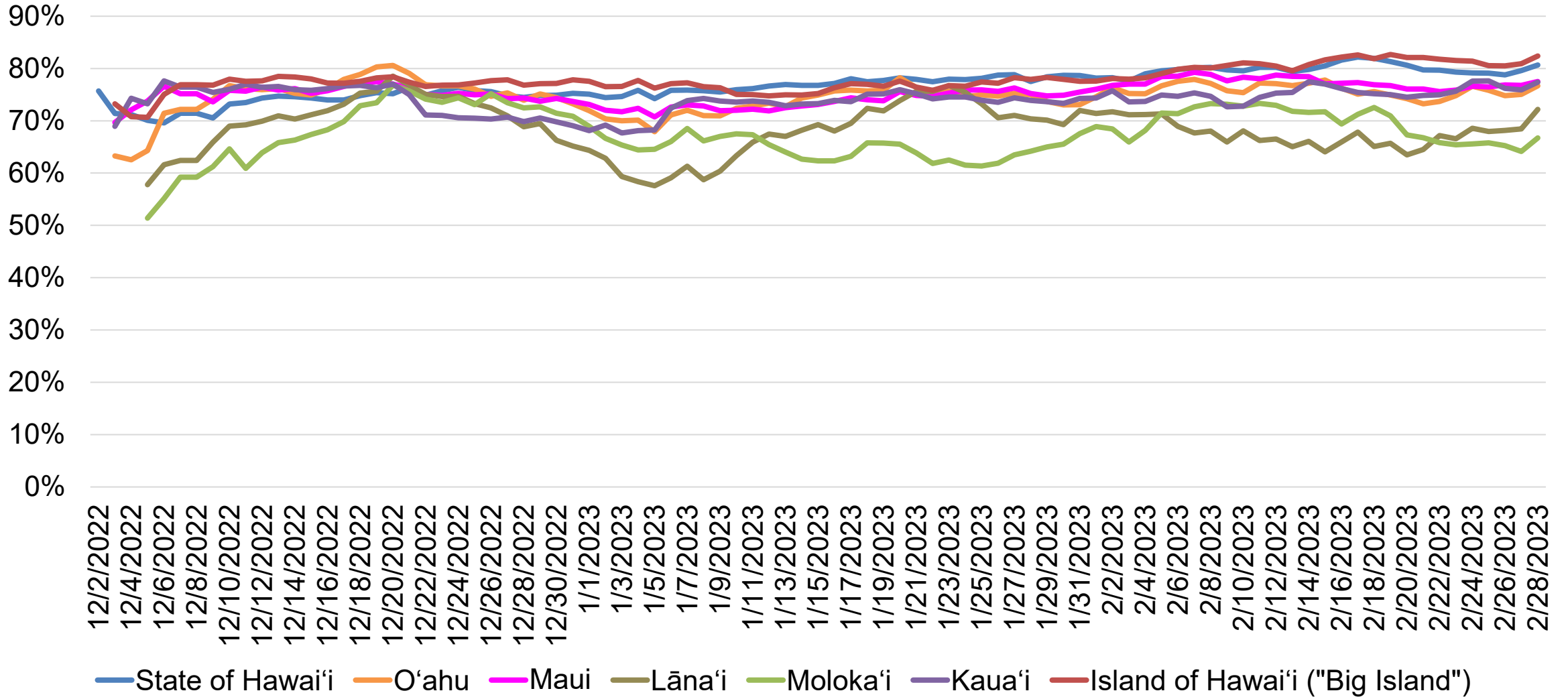
Source: Vision Insights Data as of March 15, 2023

U.S. Consideration Two-Week Moving Average



Source: Vision Insights Data as of March 15, 2023

U.S. Favorability Two-Week Moving Average



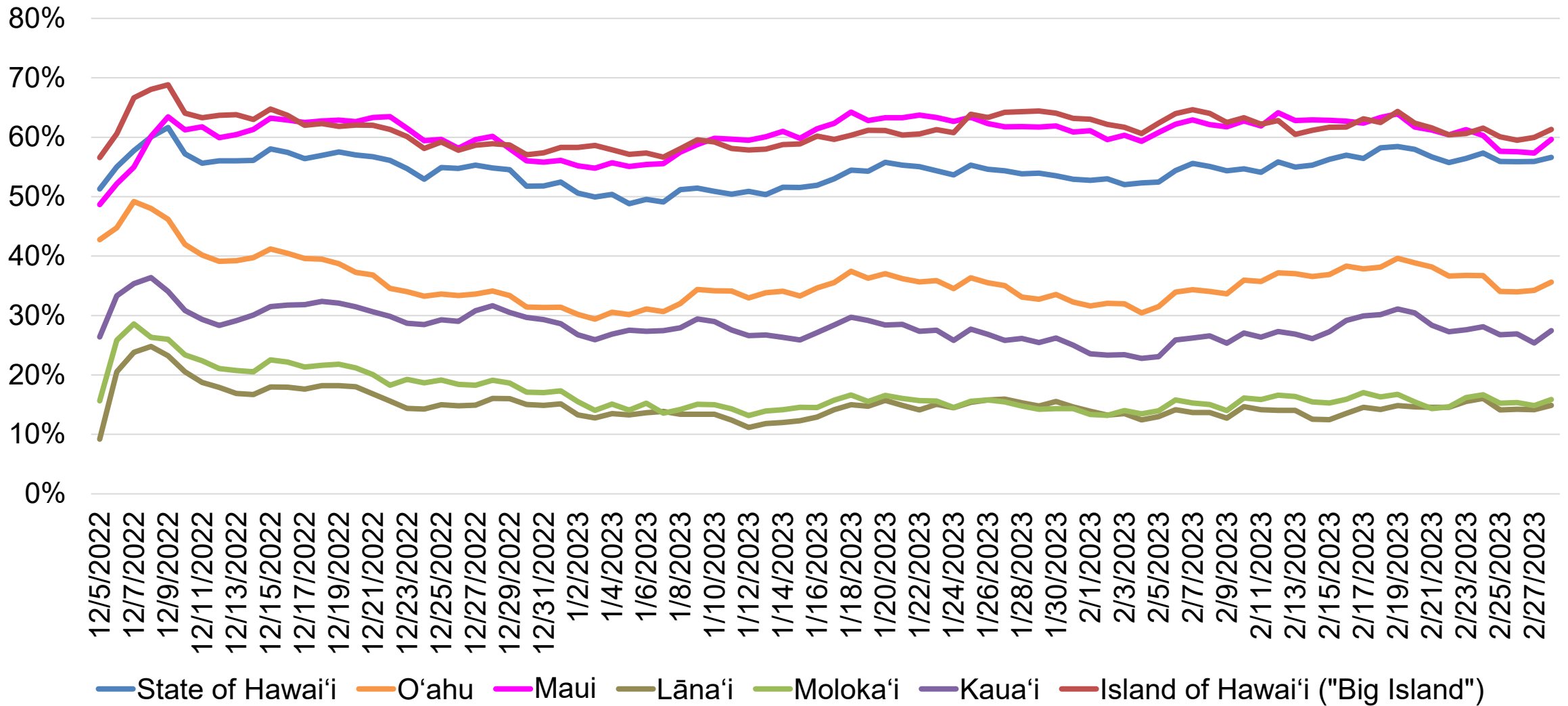
Source: Vision Insights Data as of March 15, 2023



Canada Destination Brand Health Trends



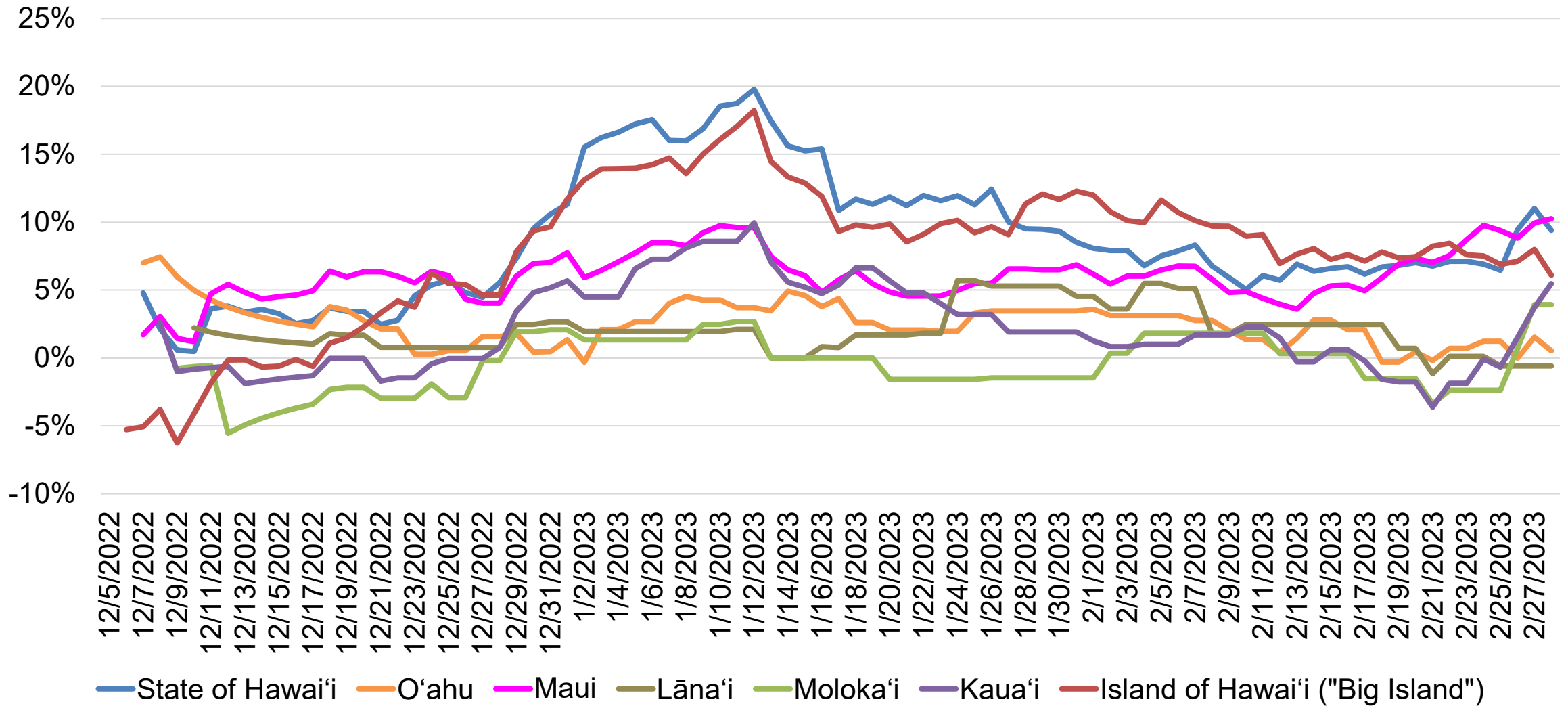
Canada Destination Awareness Two-Week Moving Average



Source: Vision Insights Data as of March 15, 2023

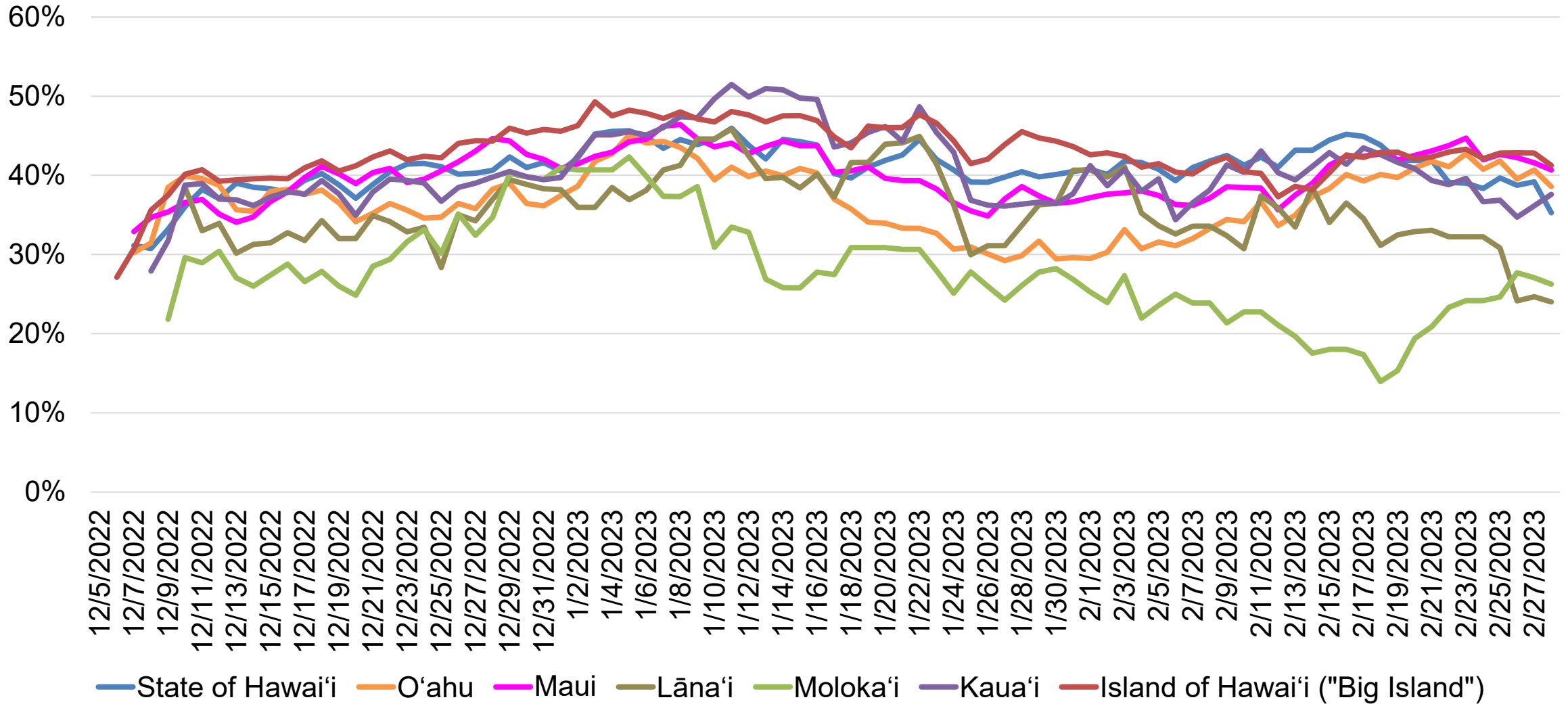


Canada Chatter (Net) Two-Week Moving Average



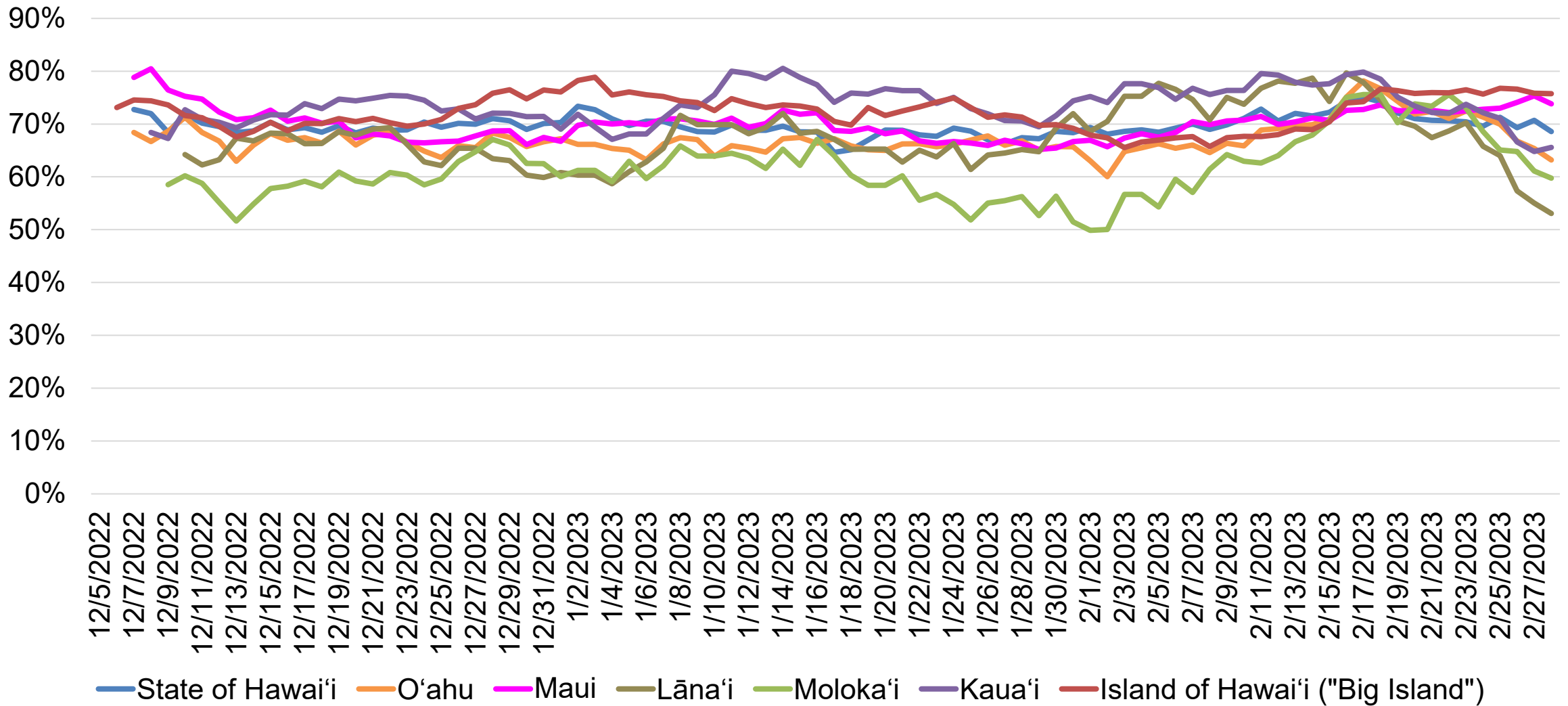
Source: Vision Insights Data as of March 15, 2023

Canada Consideration Two-Week Moving Average



Source: Vision Insights Data as of March 15, 2023

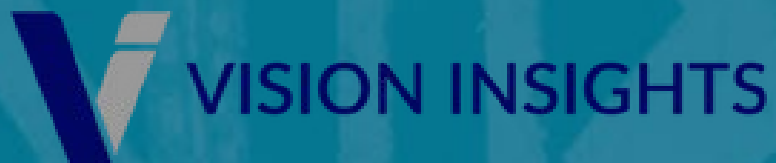
Canada Favorability Two-Week Moving Average



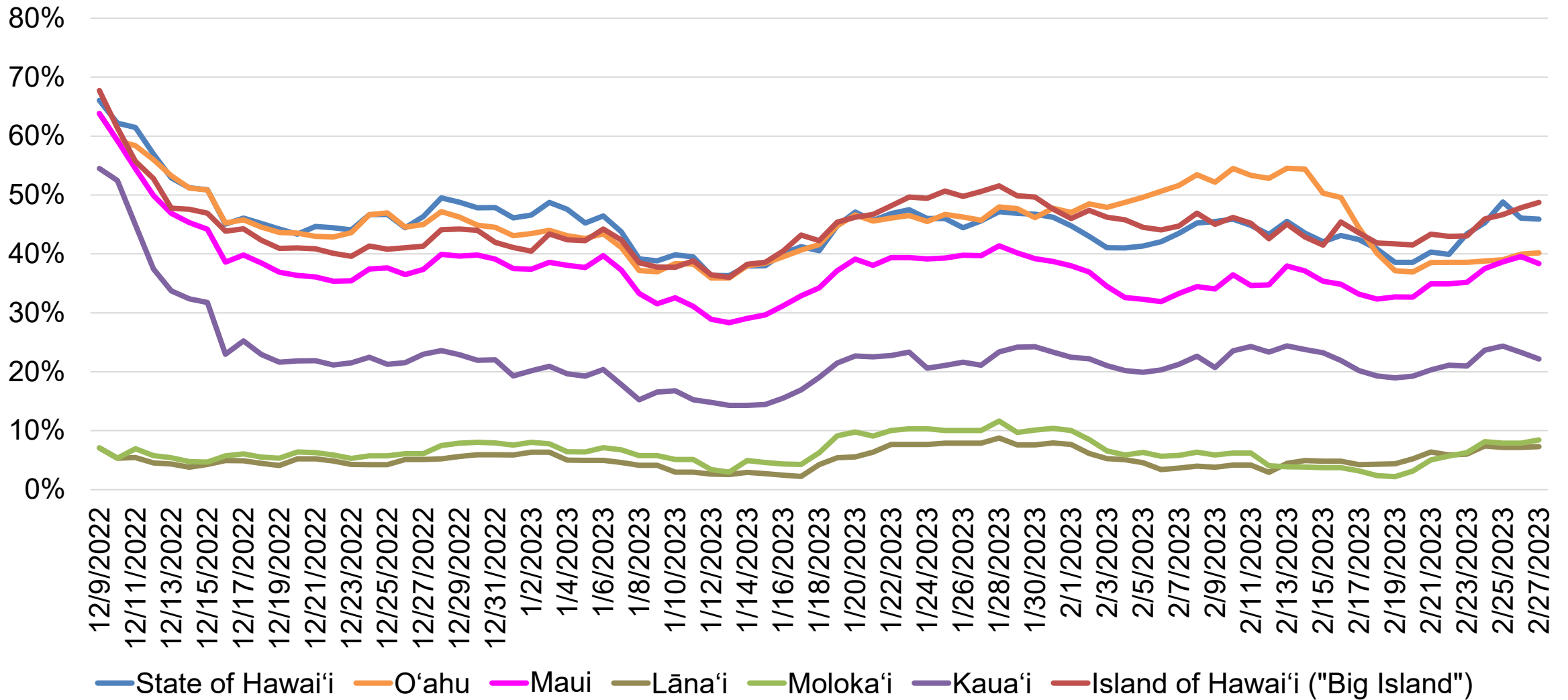
Source: Vision Insights Data as of March 15, 2023



Japan Destination Brand Health Trends



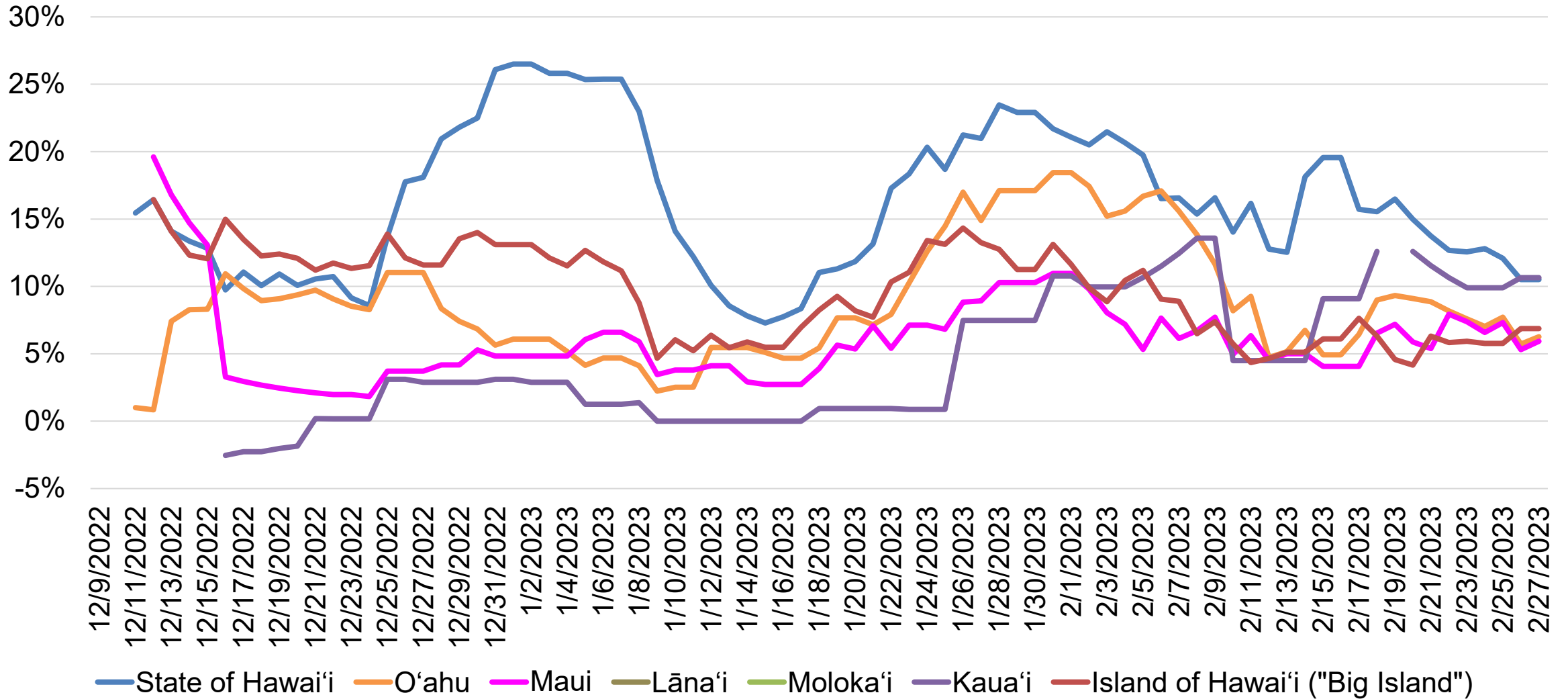
Japan Destination Awareness Two-Week Moving Average



Source: Vision Insights Data as of March 15, 2023



Japan Chatter (Net) Two-Week Moving Average

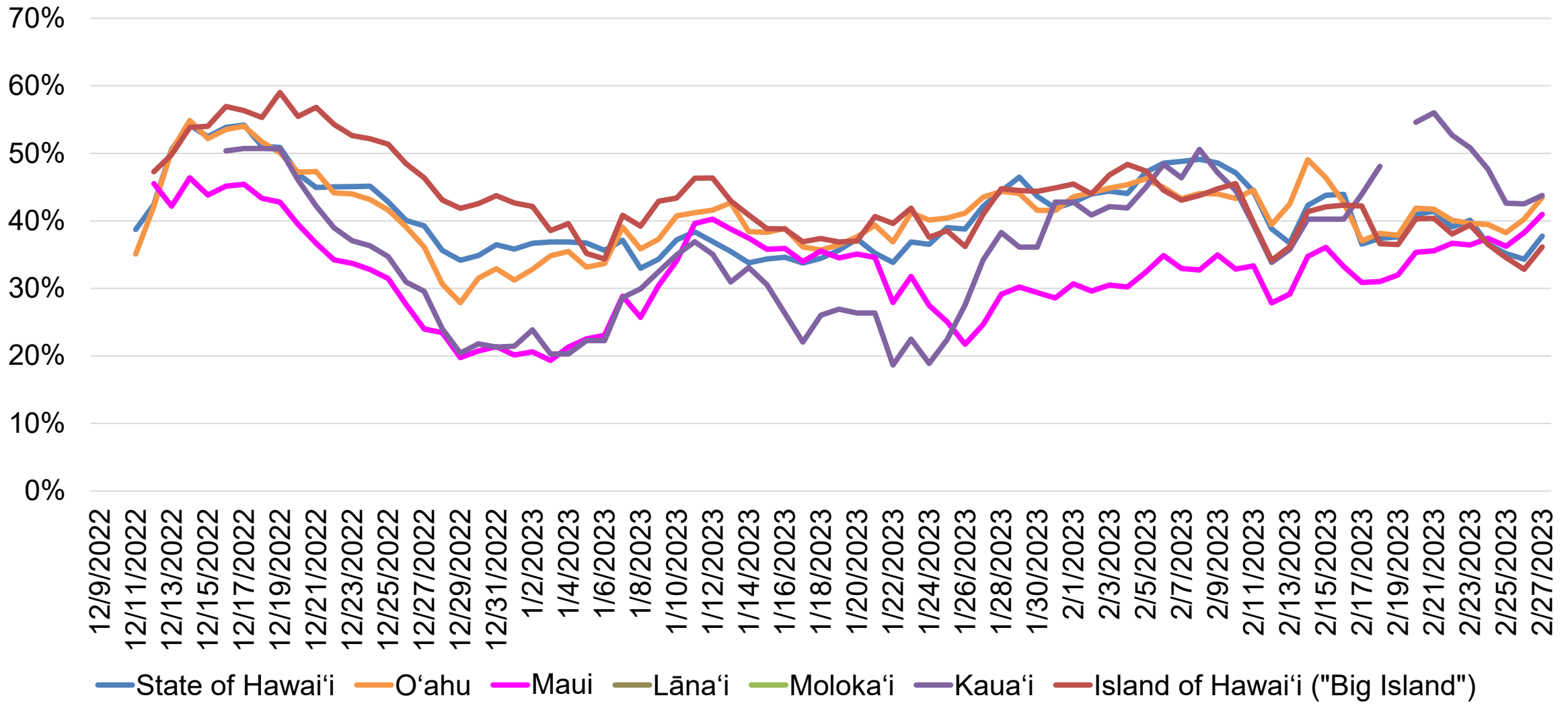


Source: Vision Insights Data as of March 15, 2023

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



Japan Consideration Two-Week Moving Average

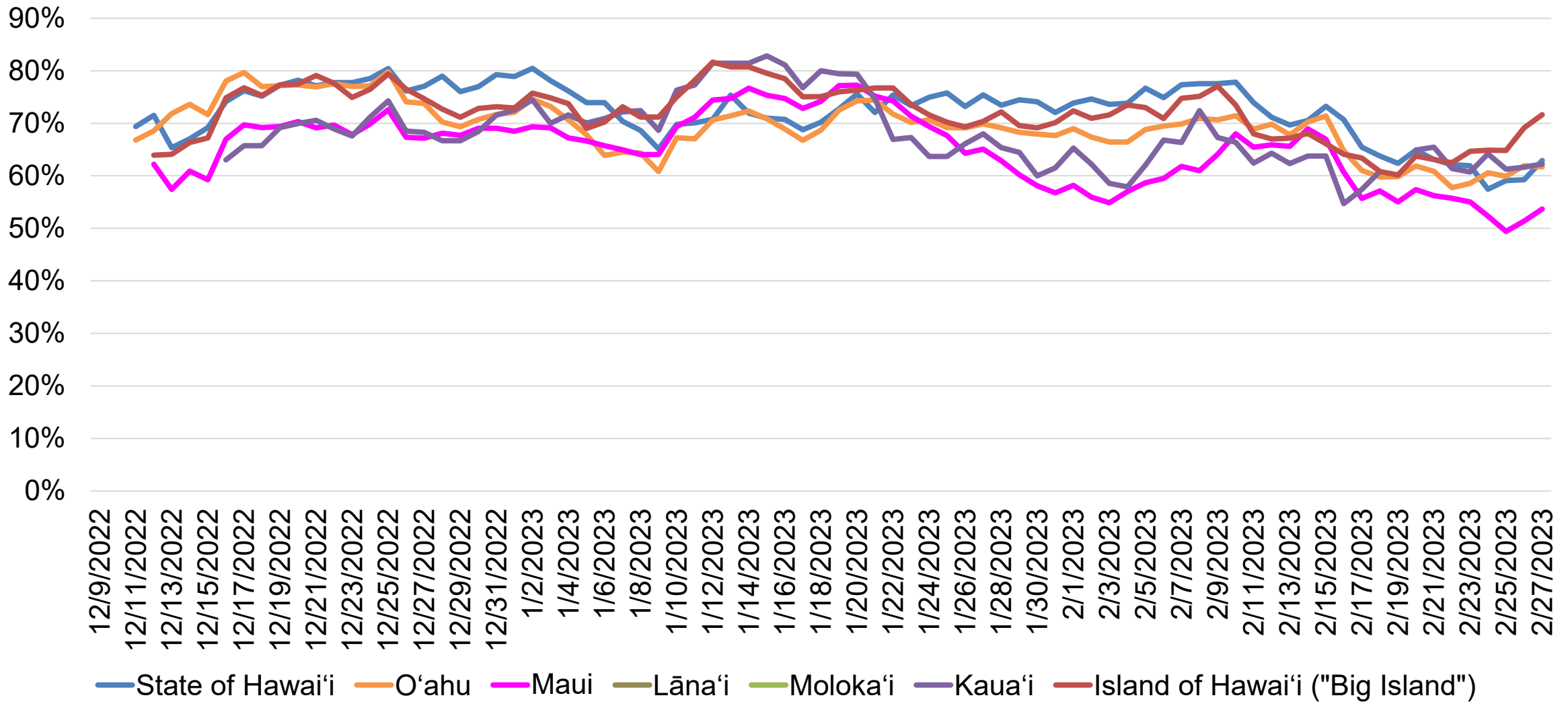


Source: Vision Insights Data as of March 15, 2023

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



Japan Favorability Two-Week Moving Average



Source: Vision Insights Data as of March 15, 2023

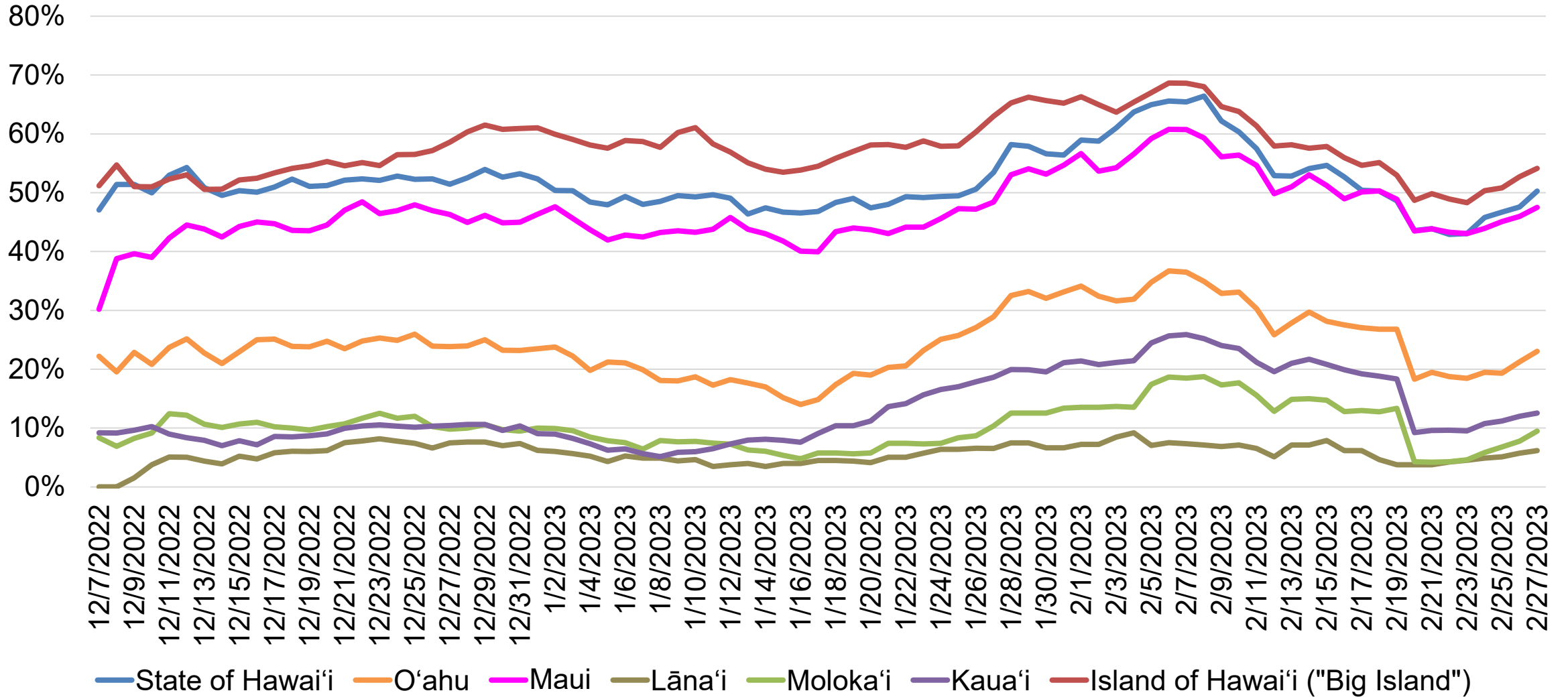
*Samples for Moloka'i and Lāna'i are small



Australia Destination Brand Health Trends

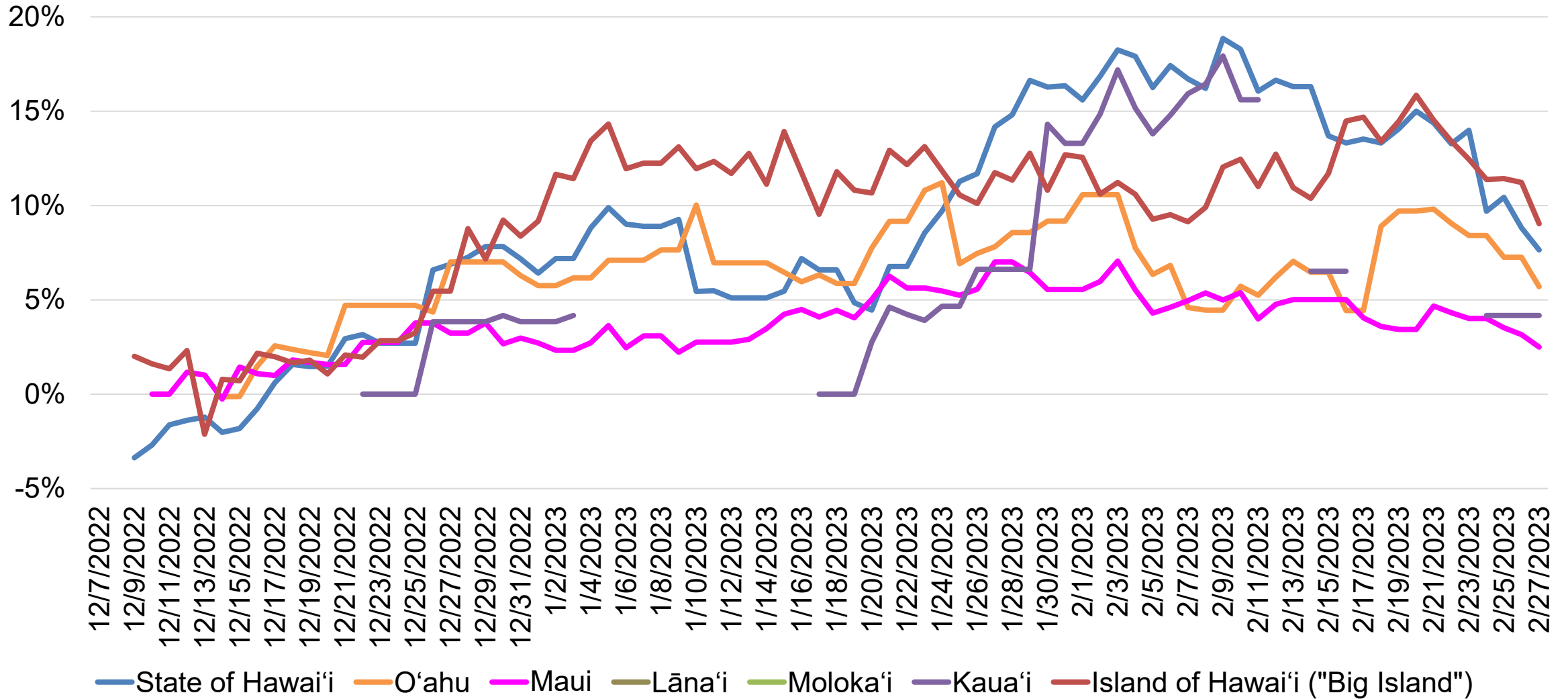


Australia Destination Awareness Two-Week Moving Average



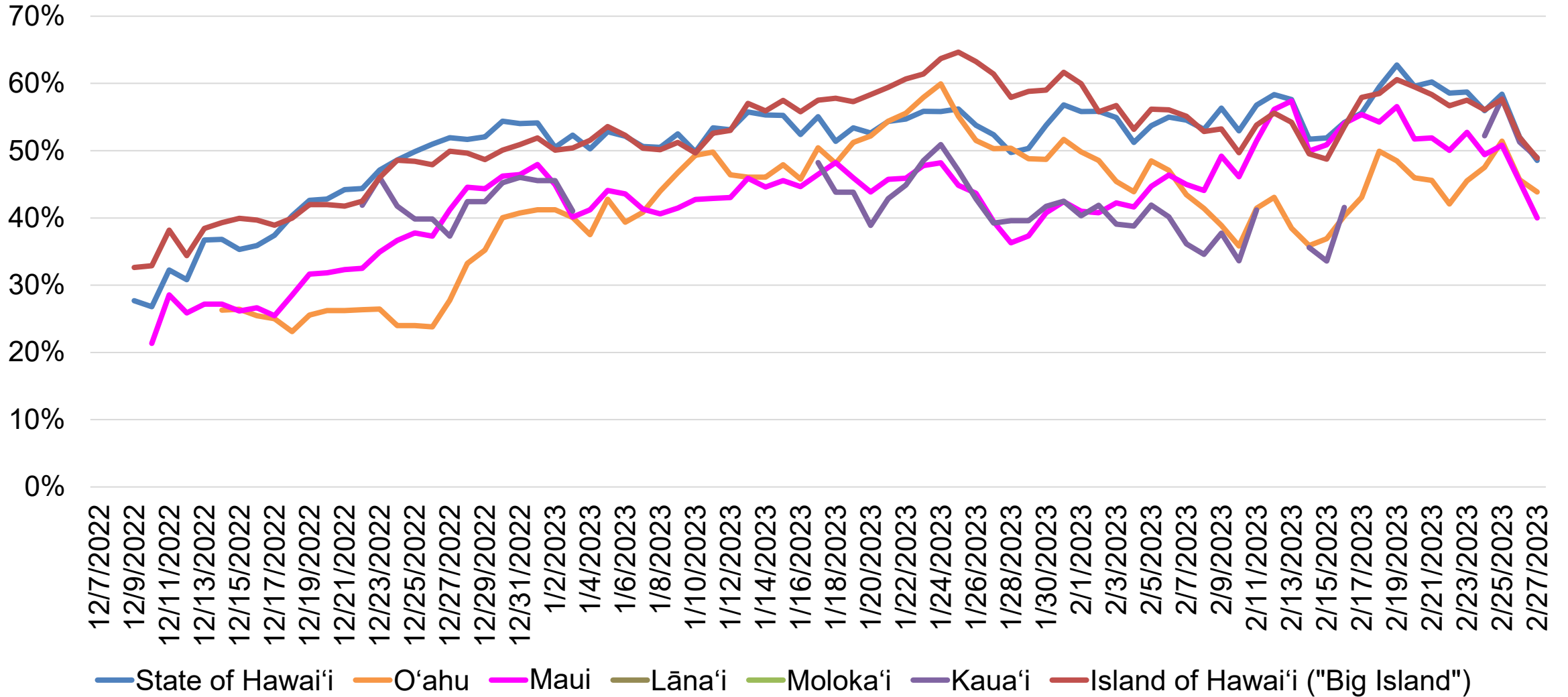
Source: Vision Insights Data as of March 15, 2023

Australia Chatter (Net) Two-Week Moving Average



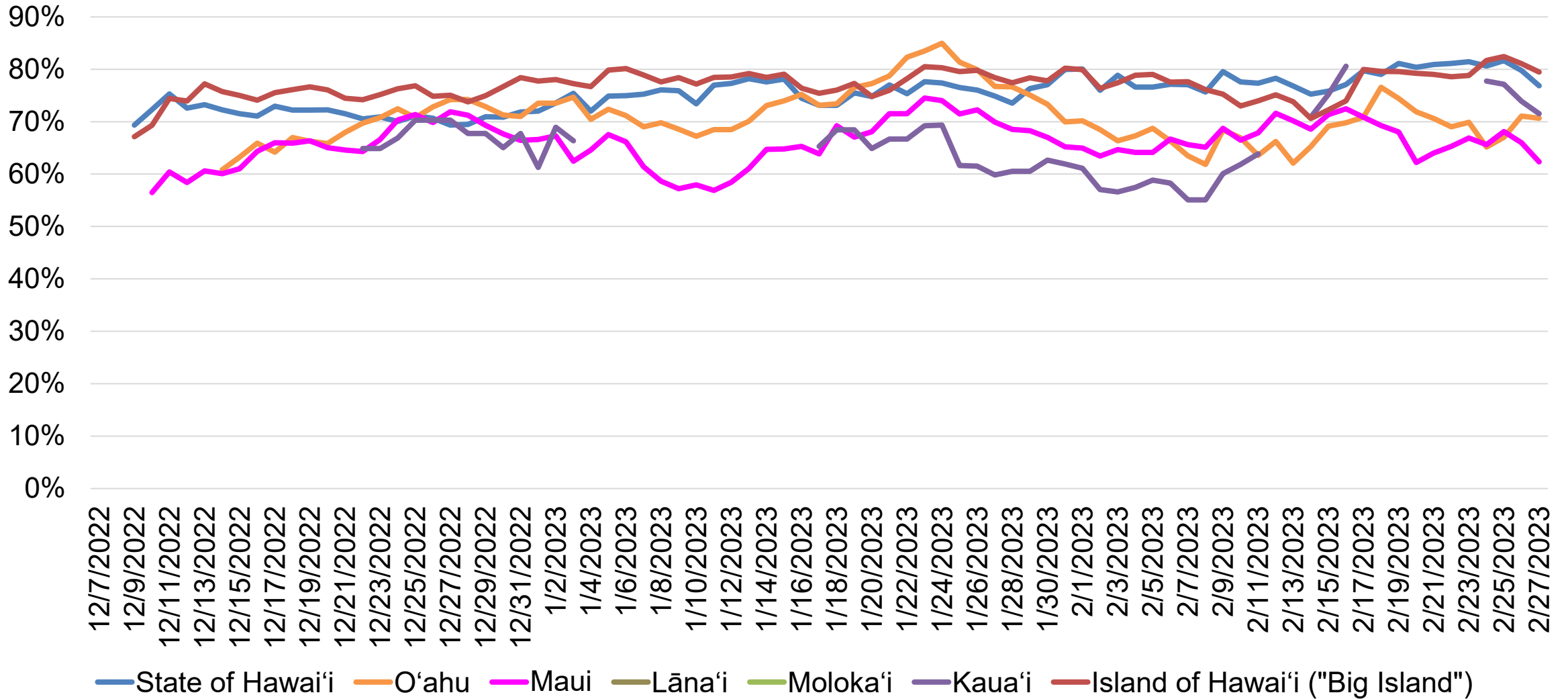
Source: Vision Insights Data as of March 15, 2023
 Samples for Kaua'i, Moloka'i, and Lāna'i are limited

Australia Consideration Two-Week Moving Average



Source: Vision Insights Data as of March 15, 2023
 Samples for Kaua'i, Moloka'i, and Lāna'i are limited

Australia Favorability Two-Week Moving Average



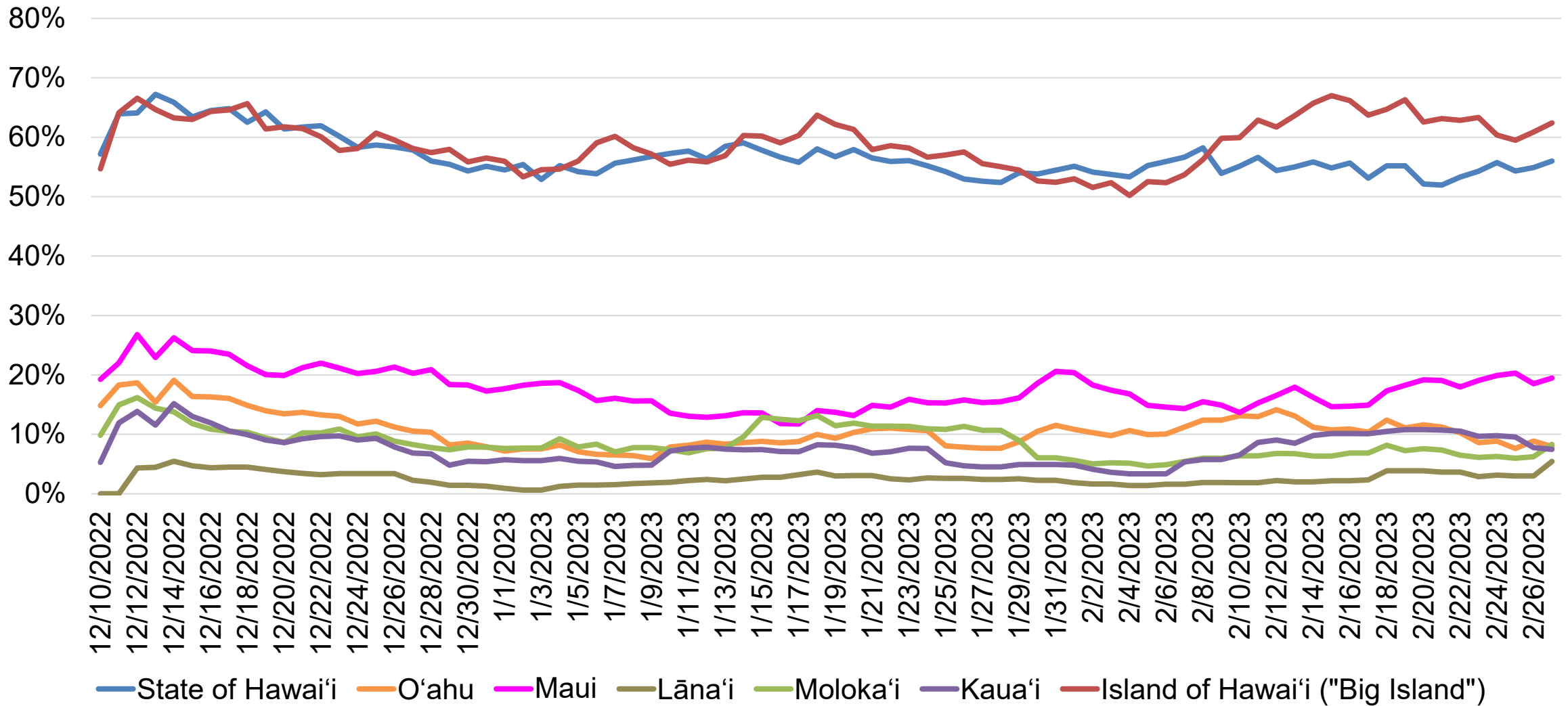
Source: Vision Insights Data as of March 15, 2023
 Samples for Kaua'i, Moloka'i, and Lāna'i are limited



Korea Destination Brand Health Trends

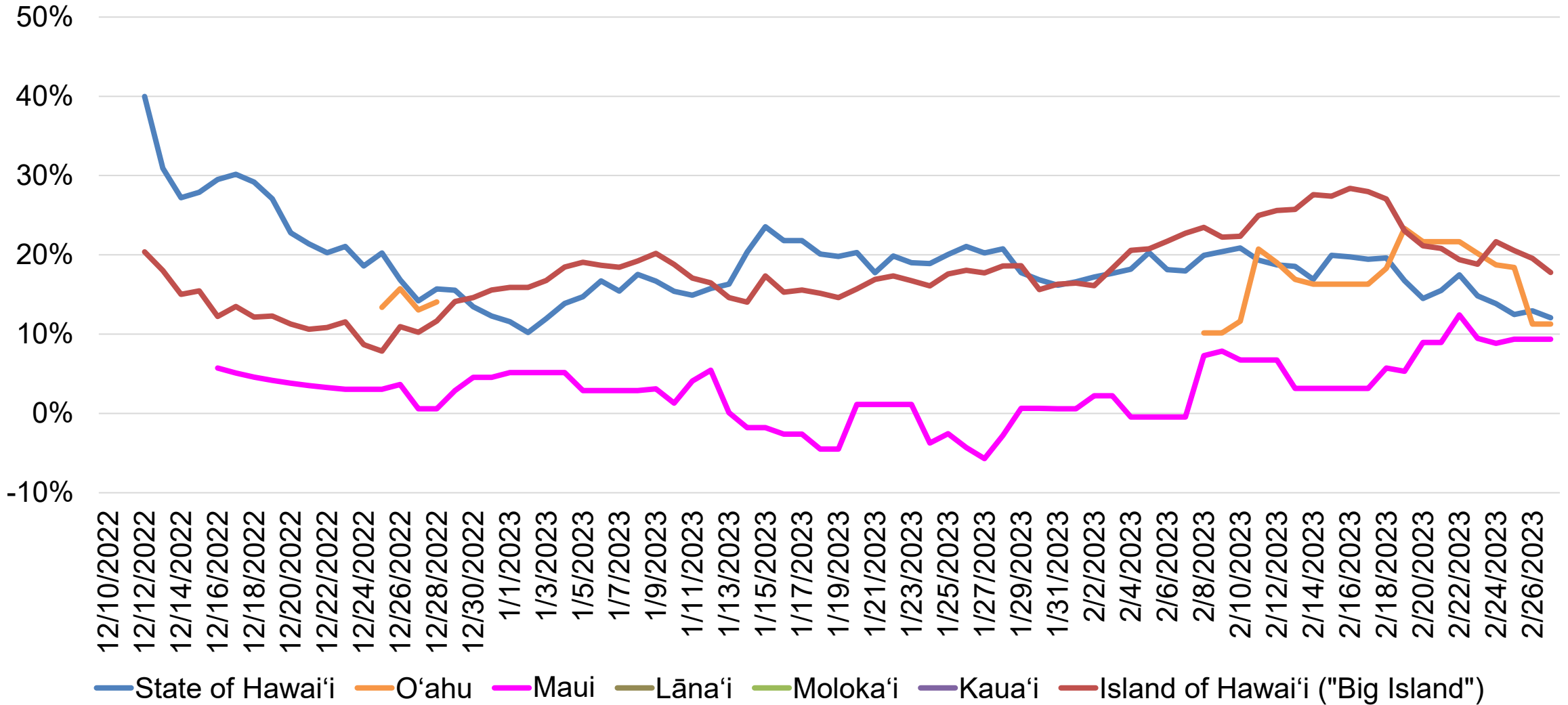


Korea Destination Awareness Two-Week Moving Average



Source: Vision Insights Data as of March 15, 2023

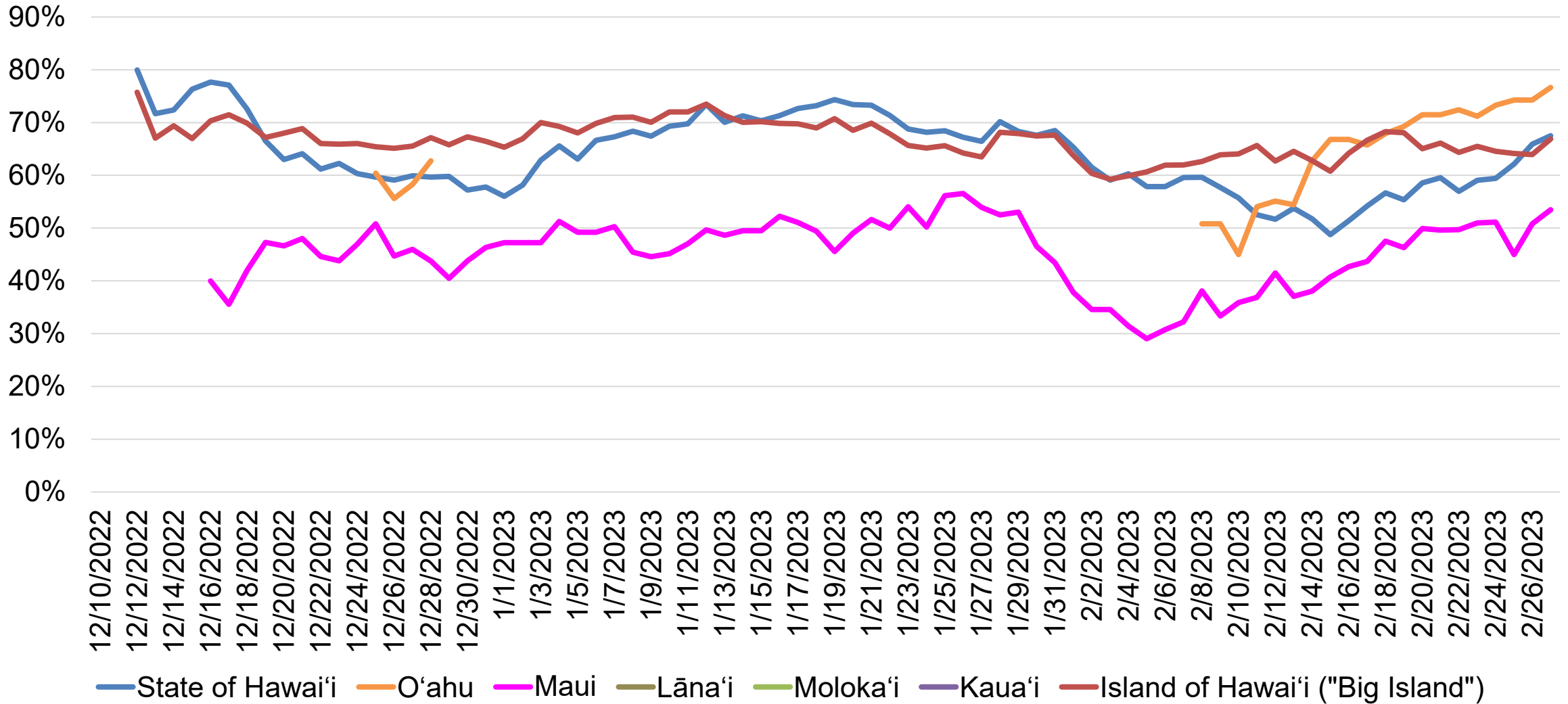
Korea Chatter (Net) Two-Week Moving Average



Source: Vision Insights Data as of March 15, 2023

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

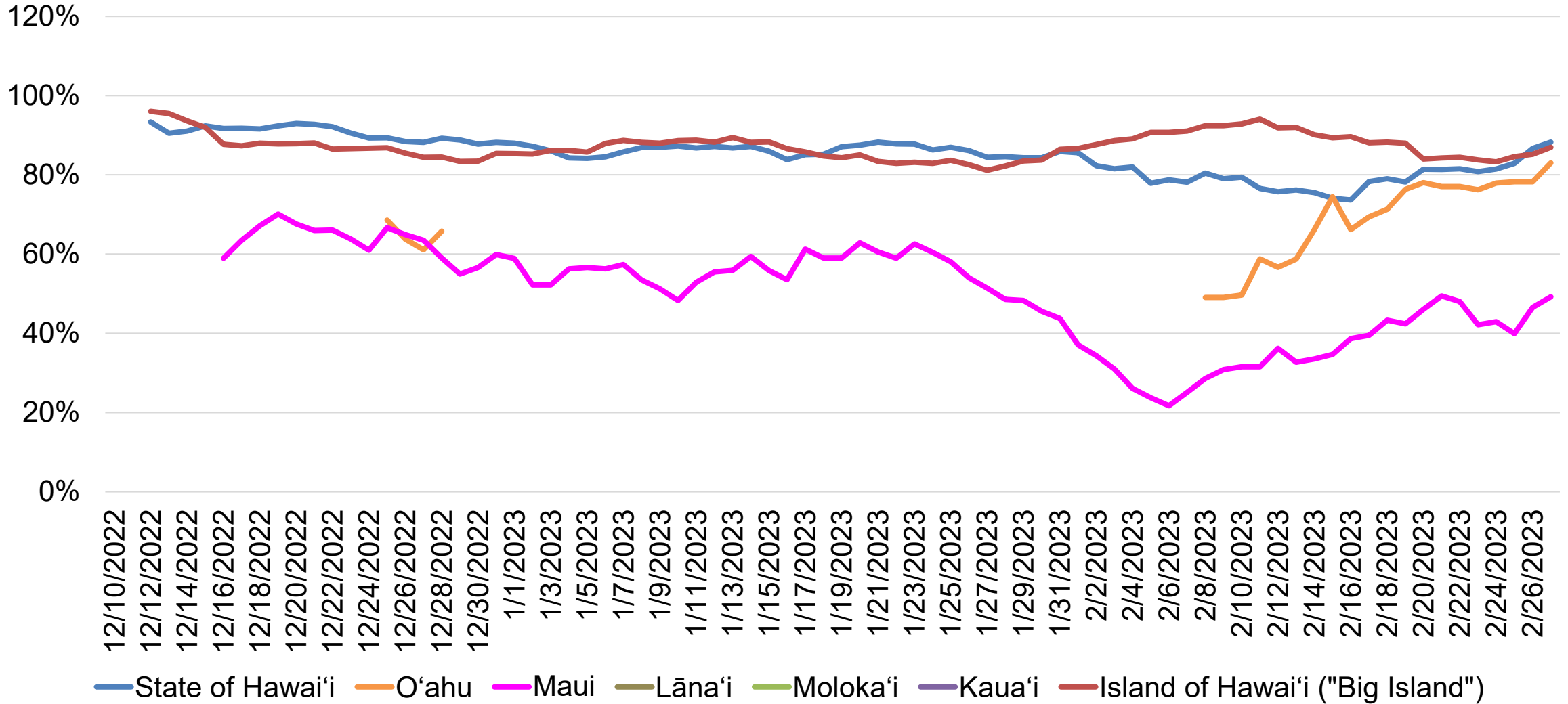
Korea Consideration Two-Week Moving Average



Source: Vision Insights Data as of March 15, 2023

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

Korea Favorability Two-Week Moving Average



Source: Vision Insights Data as of March 15, 2023

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