YouGov Destination Index Trends Responsible Travelers Segment

June 14, 2021



YouGov Syndicated Survey

- HTA subscribes to YouGov's BrandIndex and Profiles databases for the U.S., Japan, and Canada
- YouGov has a global consumer panel with over 11 million participants in 55 countries who take over 20 million surveys each year
- 10,000 consumers are surveyed each day
- HTA receives access to new data each week
- YouGov has daily brand tracking metrics media-focused, brand health, purchase/intent, consumer status
- Responsible Traveler Segment
 - Respondents who self-identify as responsible travelers (i.e., wellness focused, environmental impact, culturally minded)



Destination Index

Metrics

- Buzz
 - Net % of people that heard something positive about the brand in past two weeks minus % of people heard something negative about brand in past two weeks
- Recommend
 - Net % would recommend to others minus % would tell to avoid
- Word of Mouth Exposure
 - Yes% talked with someone about the brand (in-person, online or through social media)
- Consideration
 - Yes% would consider purchasing a brand when next in market
- Purchase Intent
 - Yes % most likely to visit the brand in question, of all brands considered



2020 Significant Dates

March 26, 2020 mandated 14day quarantine for all travelers coming to Hawai'i goes into effect at 12:01 a.m.

June 24, 2020-Gov. Ige announces pretravel testing program to avoid the mandatory quarantine starting Aug. 1st

July 25-26, 2020-Hurricane Douglas passes close to the Hawaiian Islands

August 6, 2020 announcement that interisland travel quarantine will be reinstated starting Aug. 11th

September 16, 2020pre-travel testing program launch pushed to Oct. 15th

November 24, 2020-Kaua'i County announces they will opt out of Safe Travels program starting Dec. 2nd























June 146. 2020-14-day quarantine requirement for interisland travelers lifted

July 13, 2020 pre-travel testing program launch pushed back to Sept.

July 27, 2020 -Gov. Ige announces Hawai'i is being considered by Japan for resumption of international travel

August 18, 2020 pre-travel testing program launch pushed back to Oct. 1st, at the earliest

October 15, 2020 pre-travel testing program officially begins



2021 Significant Dates

January 12, 2021 – CDC recommends all international arrivals over the age of two get tested within three days before returning to the U.S.

January 26, 2021 – new CDC regulation goes into effect, requiring all international arrivals (2+ years of age) to the U.S. have a negative COVID-19 test within three days of departure to avoid a 10-day quarantine









June 14, 2021 – all arriving passengers to Maui County must upload the *AlohaSafe* COVID-19 exposure app to their cell phones

March 5, 2021 – Gov. Ige approves Kaua'i County reentry into Safe Travels Program beginning June 14th

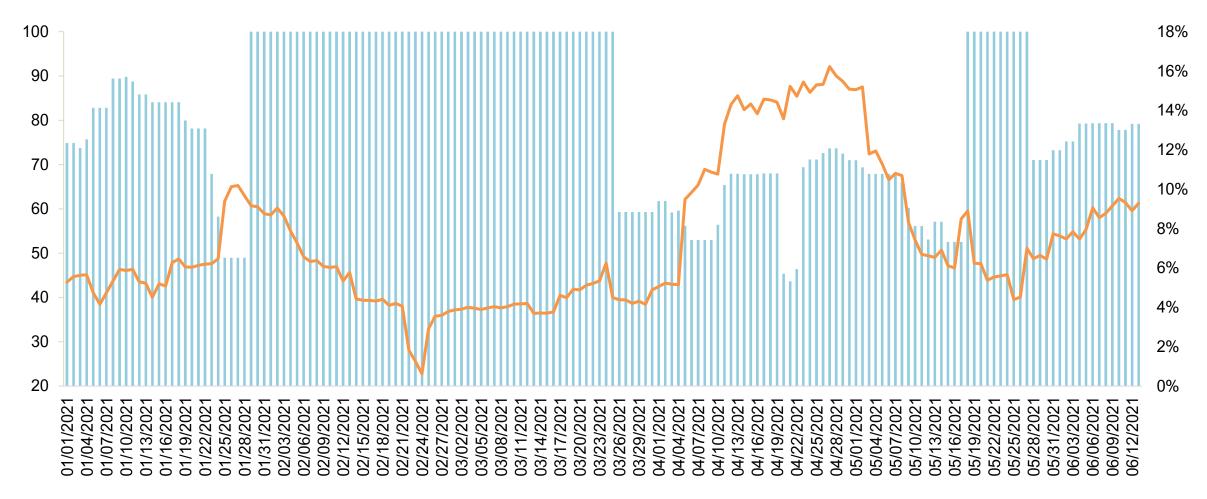


U.S. Destination Index Trends Responsible Travelers Segment O'ahu



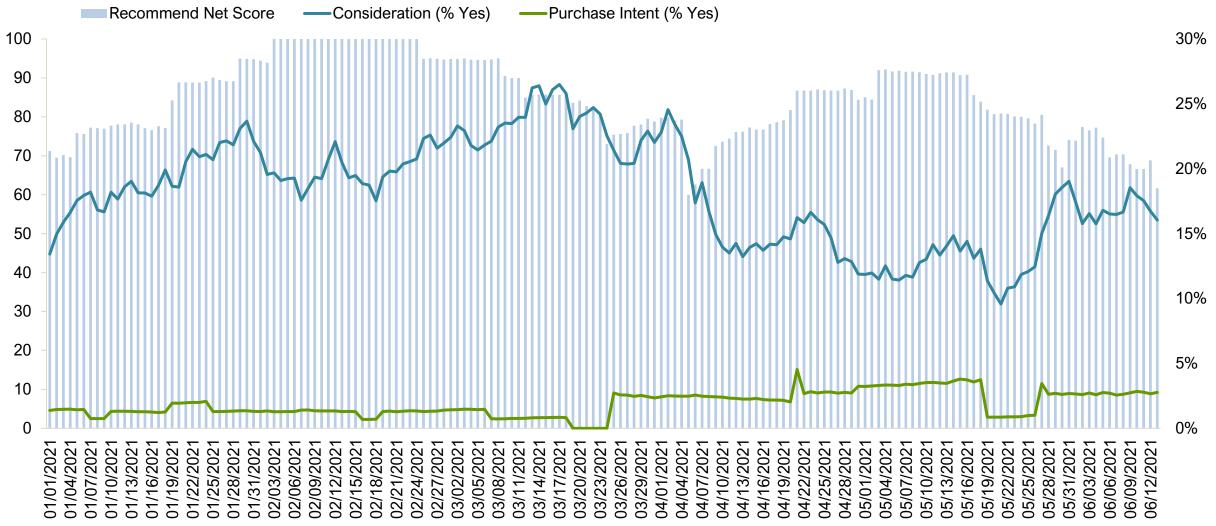
O'ahu – Buzz Net Score and Word of Mouth Exposure (% Yes) U.S. Four-Week Moving Average

Buzz Net Score — Word of Mouth Exposure (% Yes)



Buzz Question: (Net) Over the PAST TWO WEEKS, which of the following destinations have you heard something POSITIVE about (whether in the news, through advertising, or talking to friends and family)? / Now which of the following have you heard something NEGATIVE about over the PAST TWO WEEKS?

O'ahu – Recommend Net Score, Consideration (% Yes), Purchase Intent (% Yes) U.S. Four-Week Moving Average

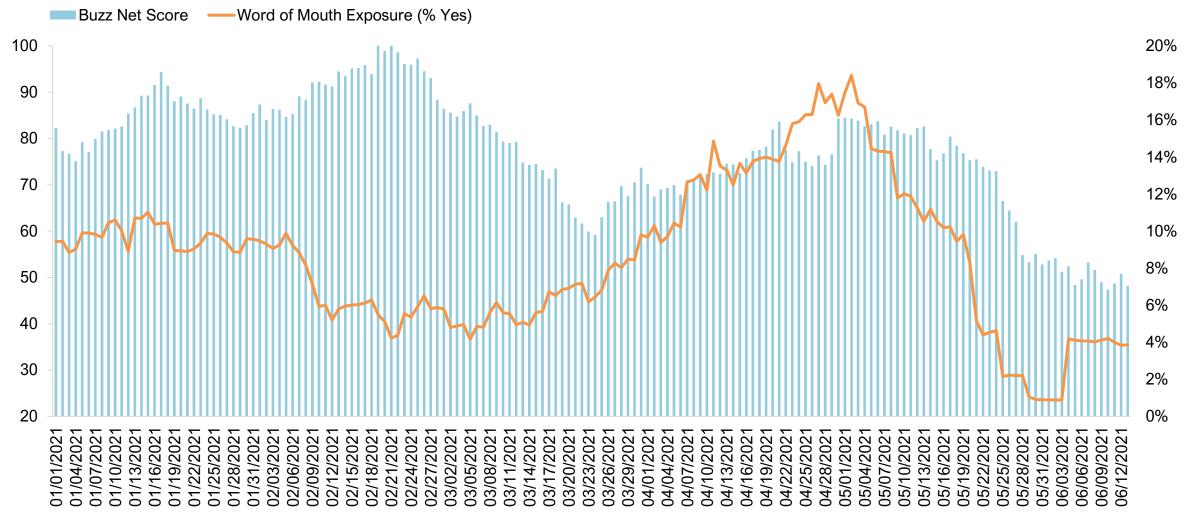


Recommend Question: (Net) Which of the following destinations would you RECOMMEND to a friend or colleague? / And which of the following destinations would you tell a friend or colleague to AVOID? **Consideration Question**: (Net) Thinking about your next vacation by air alone or with friends, family, a partner or spouse, which of the following destinations would you consider? **Purchase Intent Question**: (Net) Of the destinations considered, which are you most likely to visit?

U.S. Destination Index Trends Responsible Travelers Segment Maui

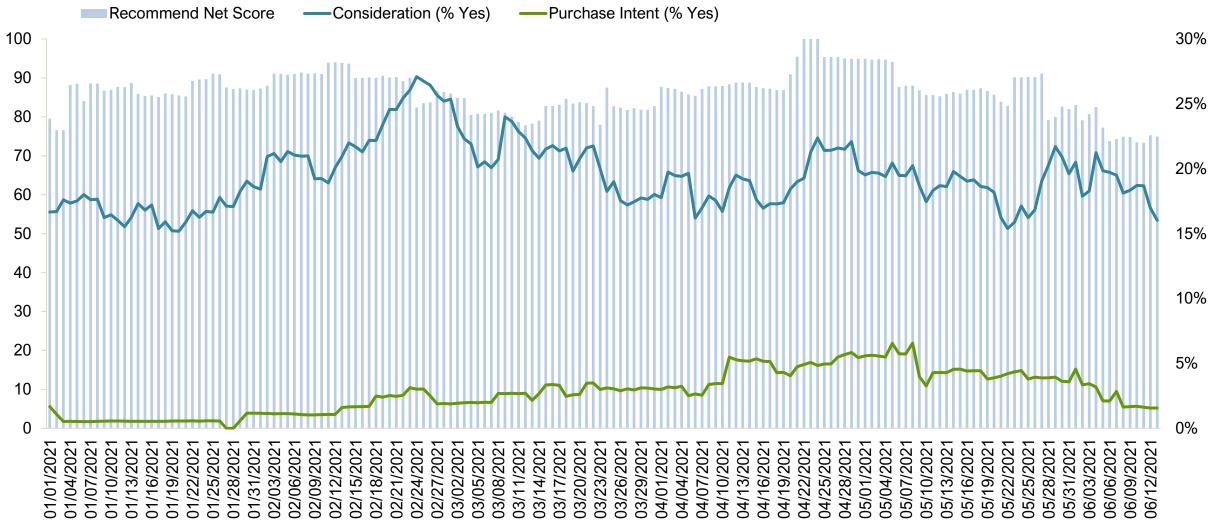


Maui – Buzz Net Score and Word of Mouth Exposure (% Yes) U.S. Four-Week Moving Average



Buzz Question: (Net) Over the PAST TWO WEEKS, which of the following destinations have you heard something POSITIVE about (whether in the news, through advertising, or talking to friends and family)? / Now which of the following have you heard something NEGATIVE about over the PAST TWO WEEKS?

Maui – Recommend Net Score, Consideration (% Yes), Purchase Intent (% Yes) **U.S. Four-Week Moving Average**

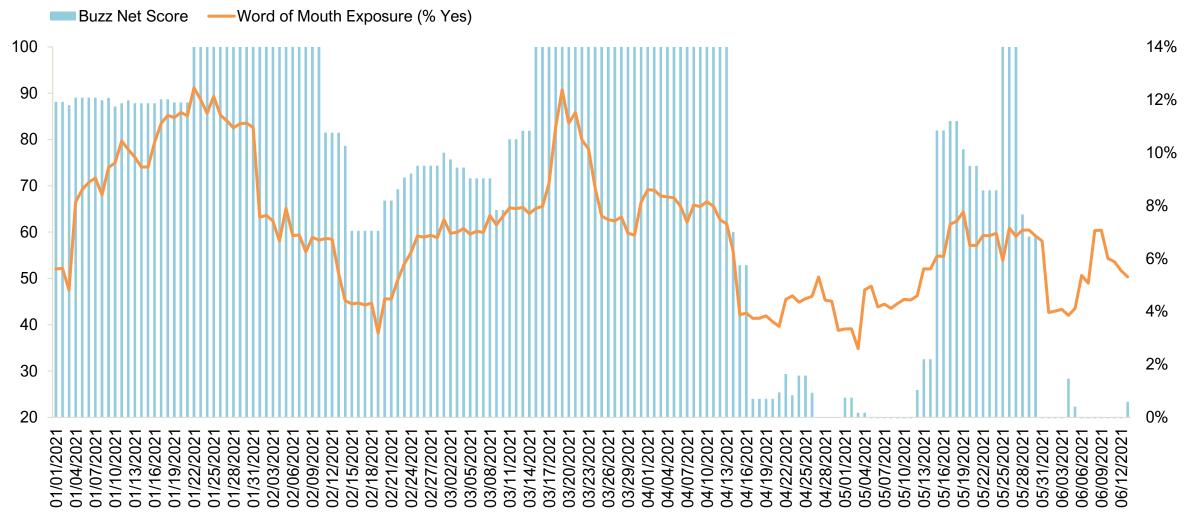


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U.S. Destination Index Trends Responsible Travelers Segment Kaua'i

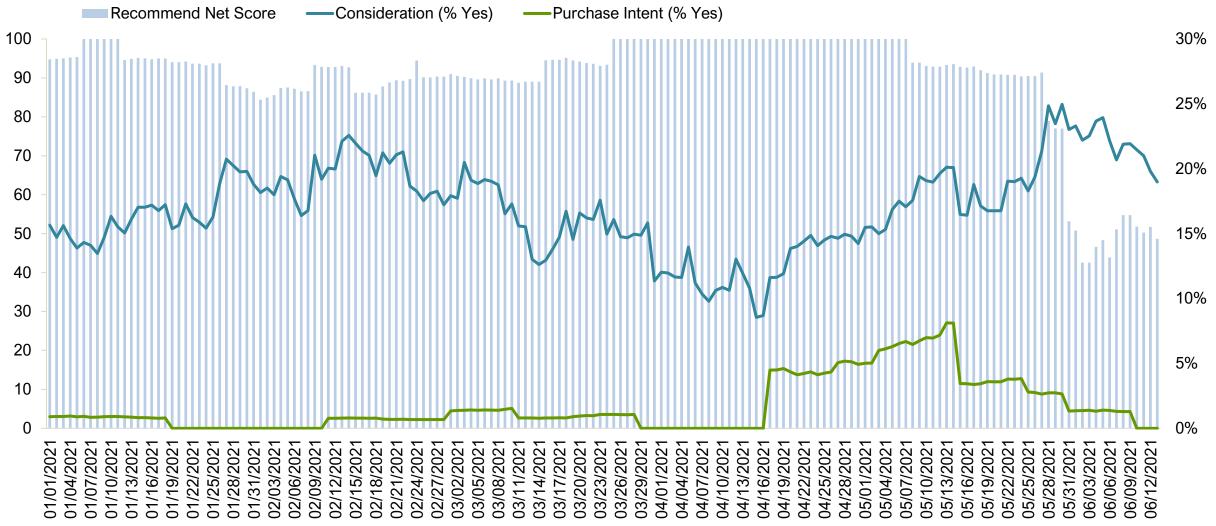


Kaua'i – Buzz Net Score and Word of Mouth Exposure (% Yes) U.S. Four-Week Moving Average



Buzz Question: (Net) Over the PAST TWO WEEKS, which of the following destinations have you heard something POSITIVE about (whether in the news, through advertising, or talking to friends and family)? / Now which of the following have you heard something NEGATIVE about over the PAST TWO WEEKS?

Kaua'i – Recommend Net Score, Consideration (% Yes), Purchase Intent (% Yes) **U.S. Four-Week Moving Average**

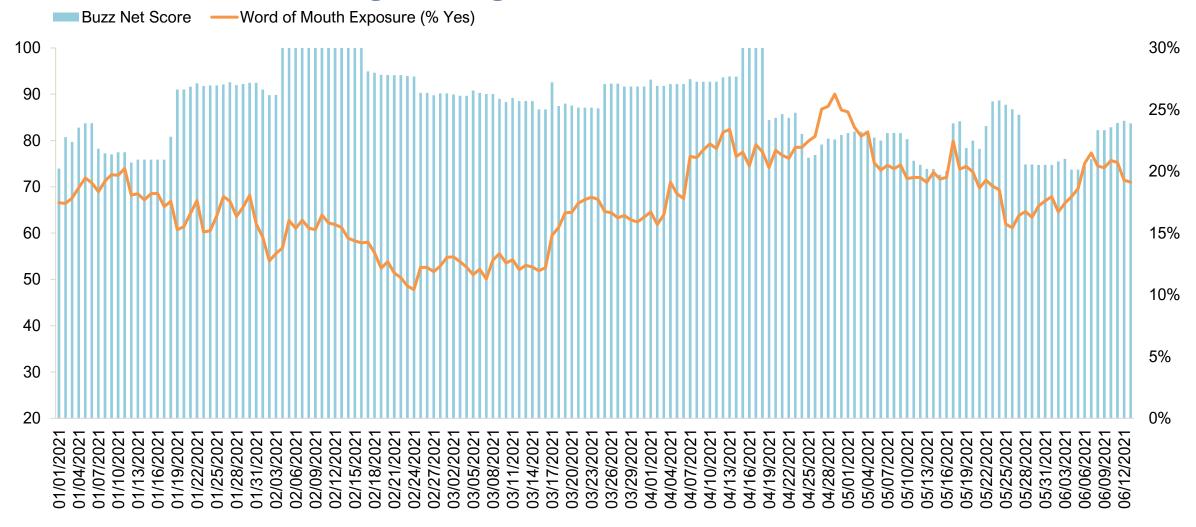


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U.S. Destination Index Trends Responsible Travelers Segment Island of Hawaii

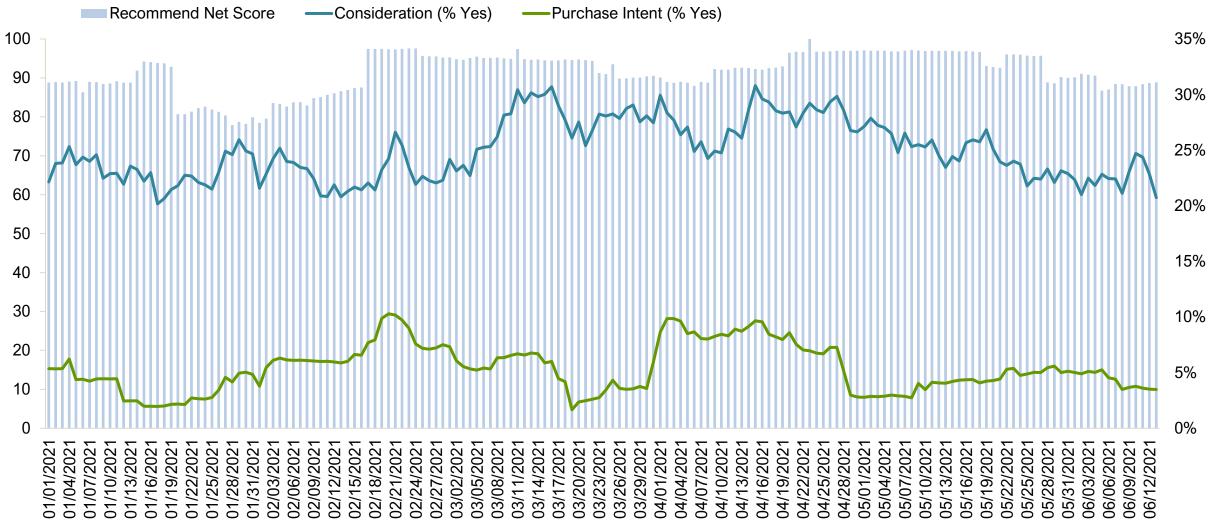


Island of Hawai'i – Buzz Net Score and Word of Mouth Exposure (% Yes) U.S. Four-Week Moving Average



Buzz Question: (Net) Over the PAST TWO WEEKS, which of the following destinations have you heard something POSITIVE about (whether in the news, through advertising, or talking to friends and family)? / Now which of the following have you heard something NEGATIVE about over the PAST TWO WEEKS?

Island of Hawai'i – Recommend Net Score, Consideration (% Yes), Purchase Intent (% Yes) **U.S. Four-Week Moving Average**



Recommend Question: (Net) Which of the following destinations would you RECOMMEND to a friend or colleague? / And which of the following destinations would you tell a friend or colleague to AVOID? Consideration Question: (Net) Thinking about your next vacation by air alone or with friends, family, a partner or spouse, which of the following destinations would you consider? Purchase Intent Question: (Net) Of the destinations considered, which are you most likely to visit?