

YouGov Destination Index Trends

December 20, 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 6 million participants in 42 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

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

- Indexing

- U.S. and Japan data are indexed to January 1, 2020, as a pre-COVID-19 baseline to compare magnitude in shifts across markets. Canada data began on September 18, 2020, well into the pandemic, and thus cannot be indexed to a pre-pandemic date.

2020 Significant Dates

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

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

September 6-26, 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, 2020 – pre-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

September 16, 2020 – 14-day quarantine requirement for interisland travelers lifted

July 13, 2020 – pre-travel testing program launch pushed back to Sept. 1st

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

September 6, 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. All international arrivals (2+ years of age) to the U.S. must have a negative COVID-19 test within three days of departure to avoid a 10-day quarantine

June 4, 2021 – Gov. Ige announces that starting June 15, all restrictions for inter-county travel will be lifted and travelers entering the state who have been vaccinated in Hawai'i may bypass quarantine without a pre-travel test.

August 23, 2021 – Gov. Ige announces "Now's not a good time to visit Hawai'i."

November 8, 2021 - Non-citizen, non-immigrant air travelers to the United States will be required to be fully vaccinated and to provide proof of vaccination status prior to boarding an airplane to fly to the U.S

January 20, 2021 – all arriving passengers to Maui County must upload the *AlohaSafe* COVID-19 exposure app to their cell phones

March 3, 2021 – Gov. Ige approves Kaua'i's re-entry into Safe Travels for Trans-Pacific travelers beginning April 5

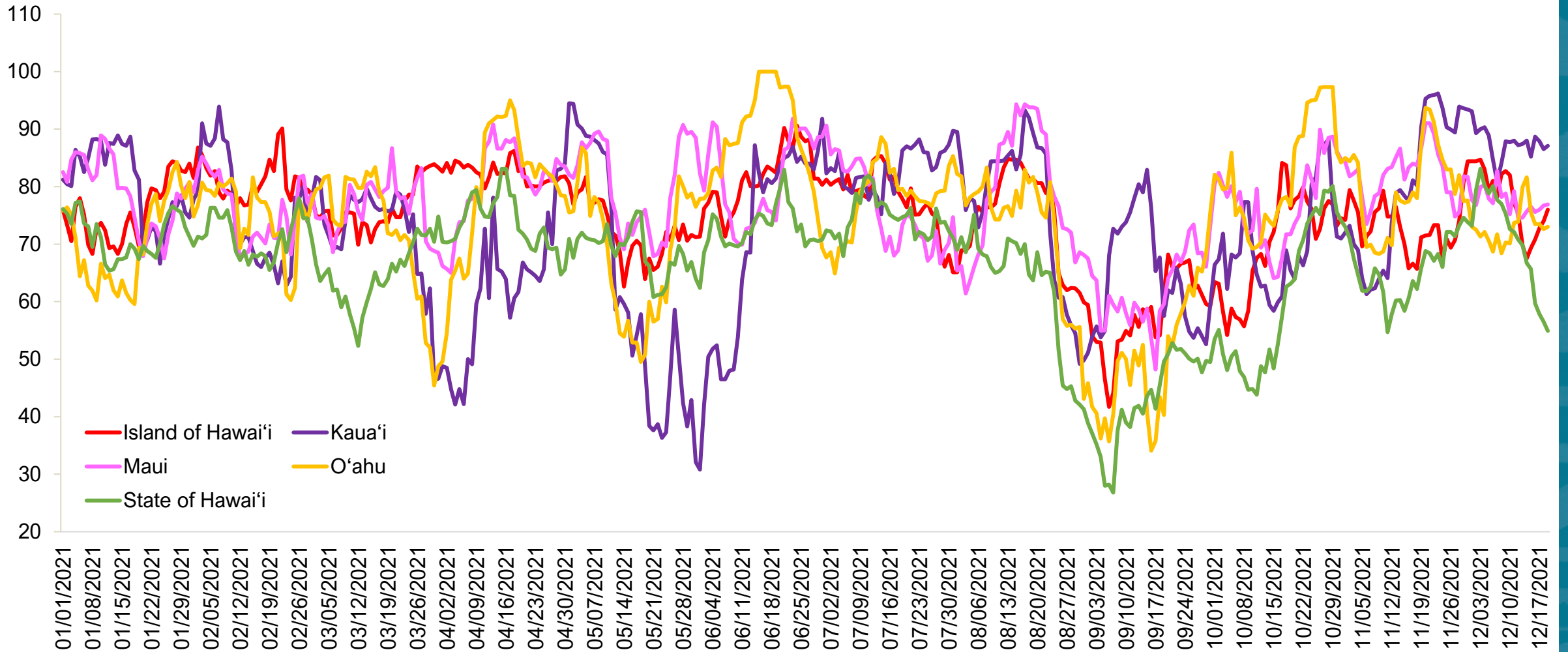
June 24, 2021 – Gov. Ige announces that individuals vaccinated in the U.S. will be able to bypass the testing/quarantine requirement with proof of vaccination through the state's Safe Travels program

October 19, 2021 – Governor Ige announced "Beginning November 1, we want to invite and encourage fully vaccinated visitors or residents to travel transpacific or inter-island"

U.S. Destination Index Trends



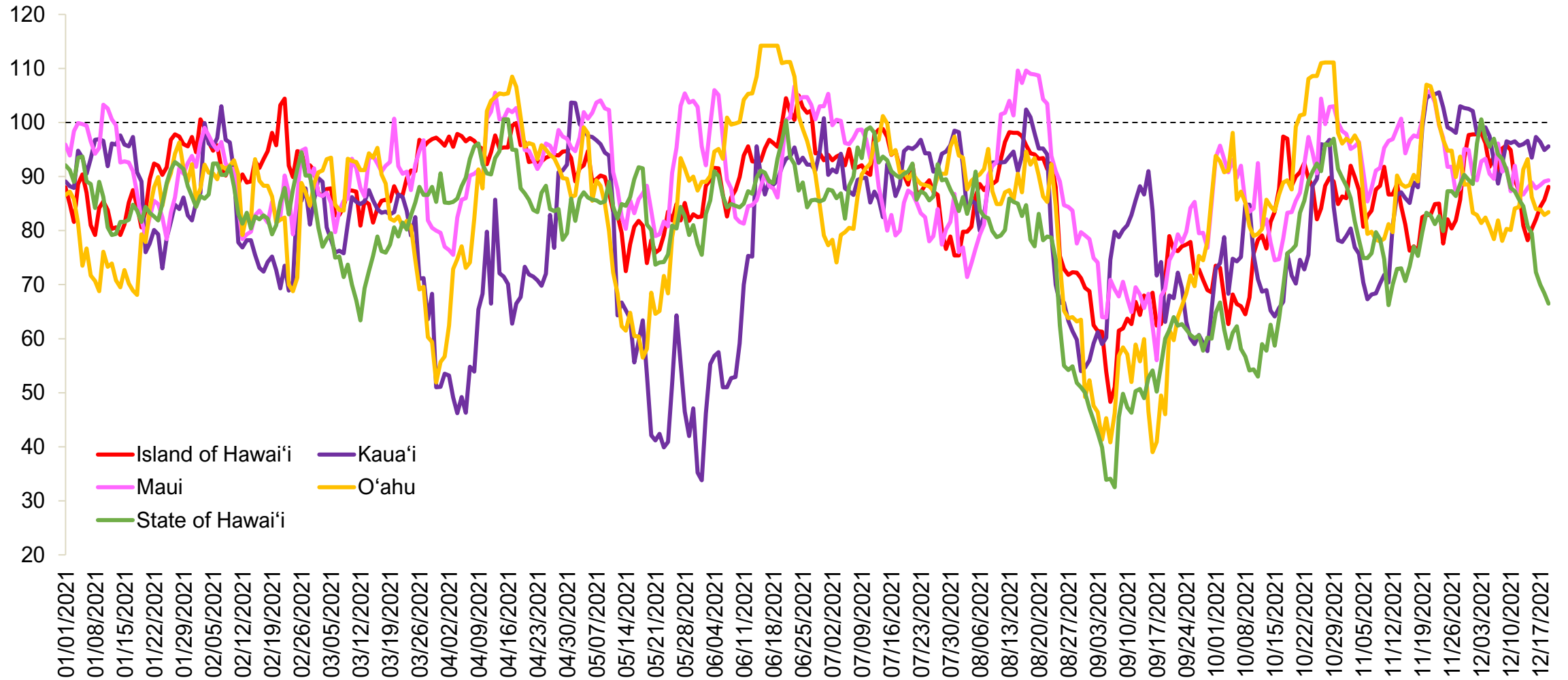
U.S. Buzz Net Score Two-Week Moving Average



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?

Source: YouGov data as of December 20, 2021

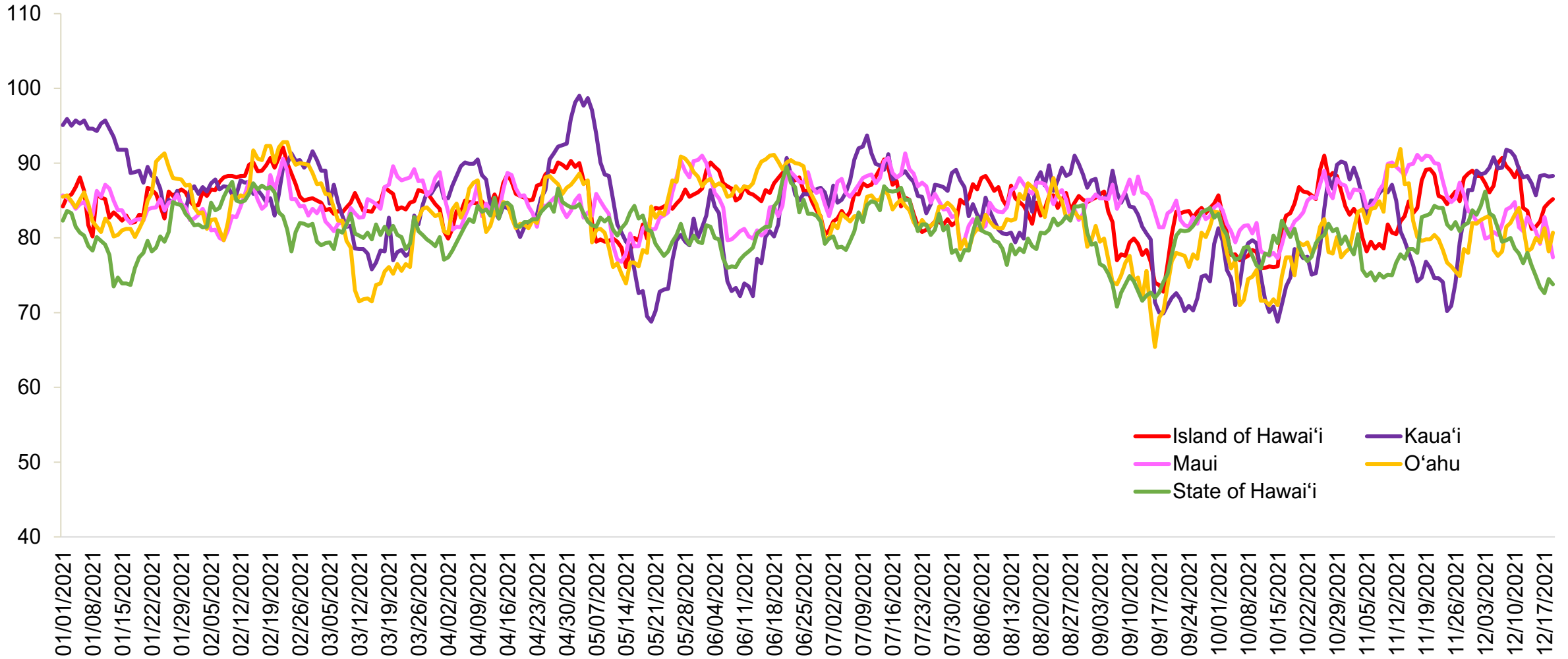
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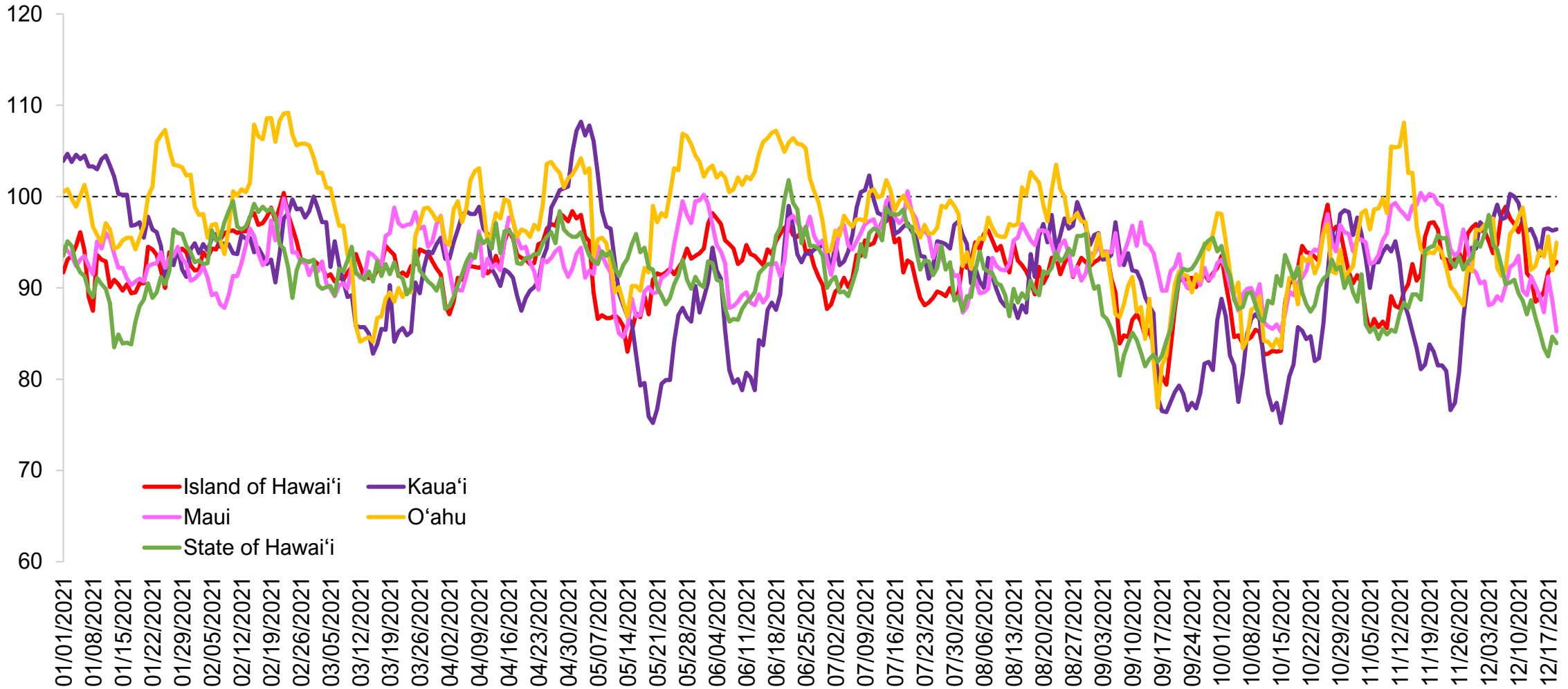
Source: YouGov data as of December 20, 2021

U.S. Recommend Net Score Two-Week Moving Average



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?

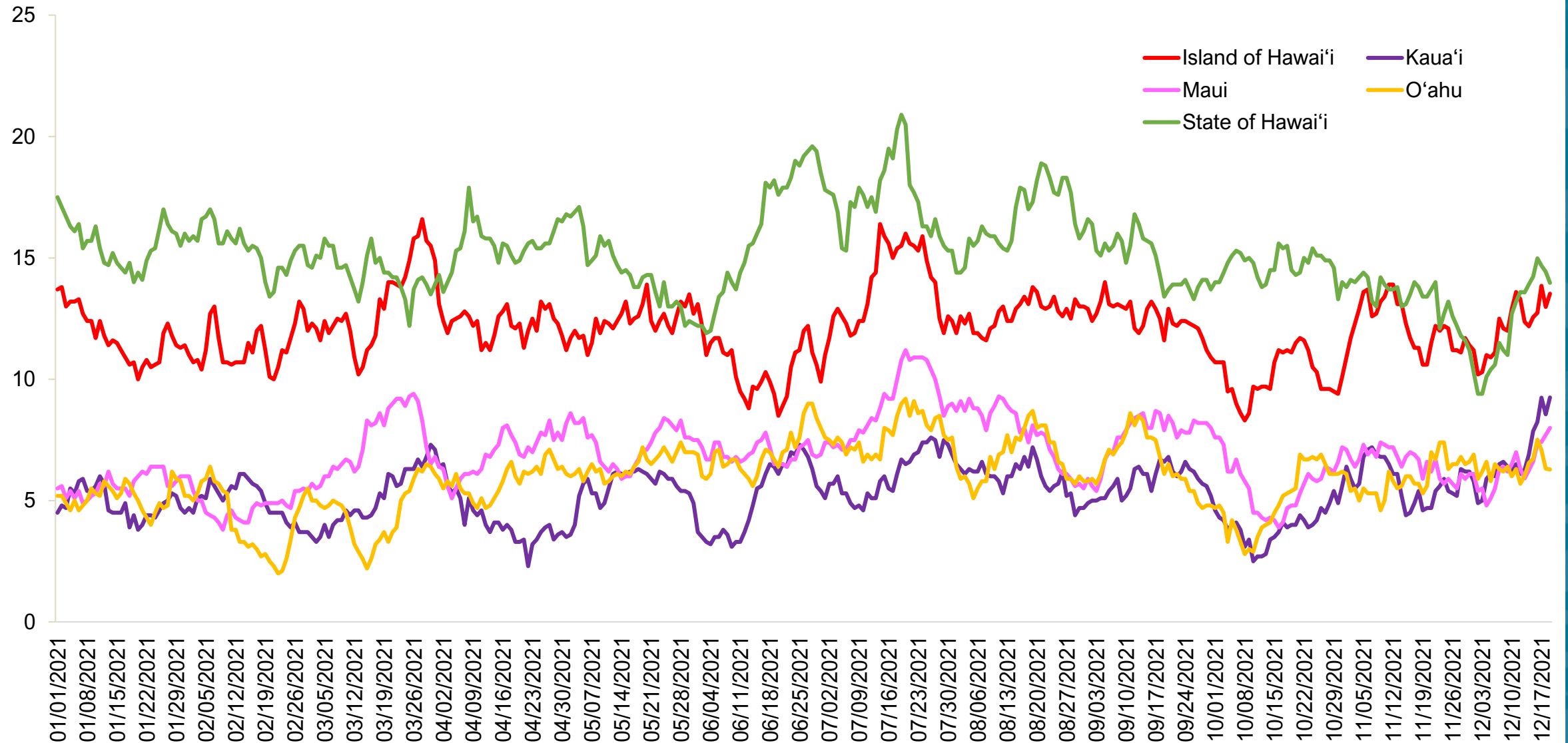
Index of U.S. Recommend Net Score Two-Week Moving Average



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?

Source: HVCB analysis of YouGov data as of December 20, 2021

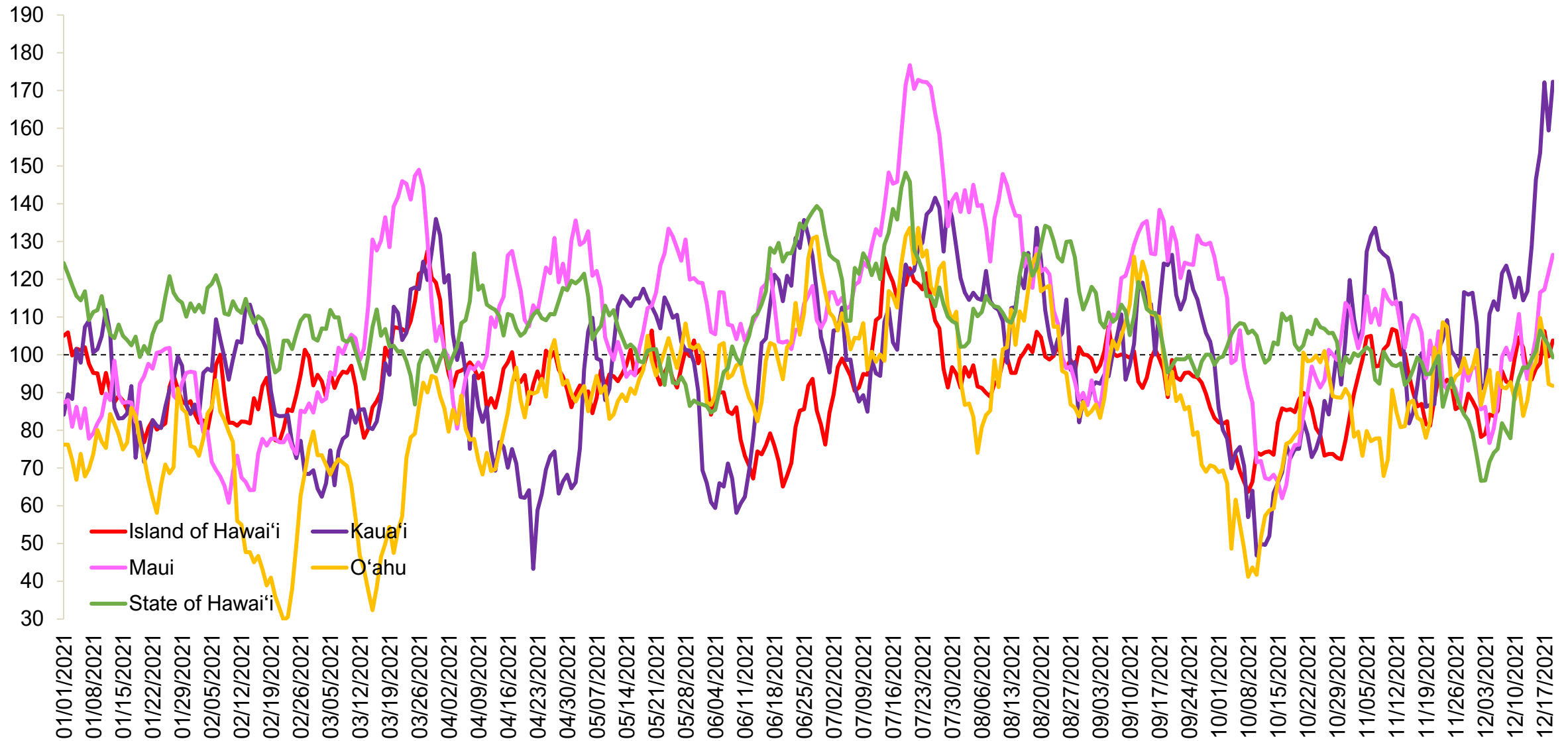
U.S. Word of Mouth Exposure (% Yes) Two-Week Moving Average



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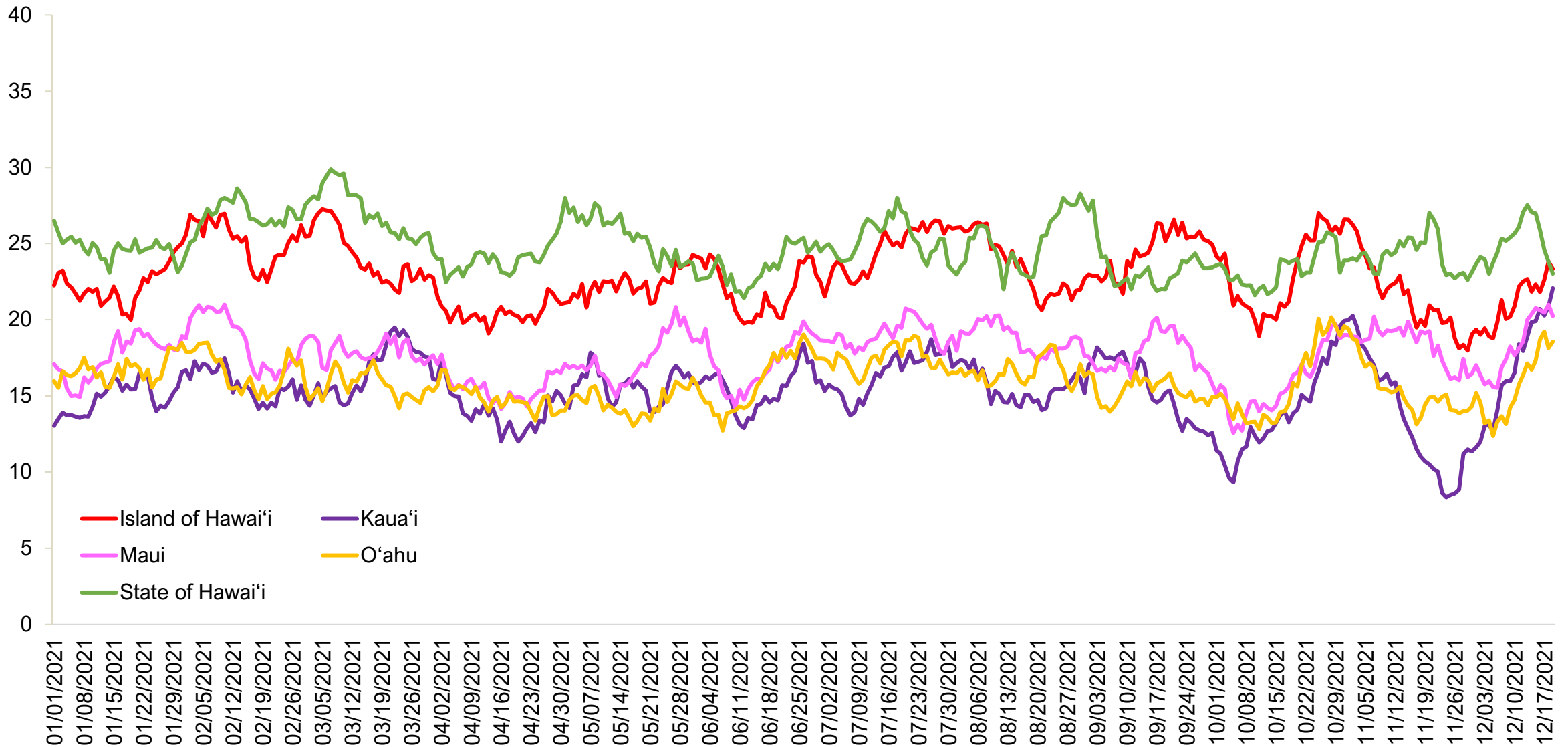
Source: YouGov data as of December 20, 2021

Index of U.S. Word of Mouth Exposure (% Yes) Two-Week Moving Average



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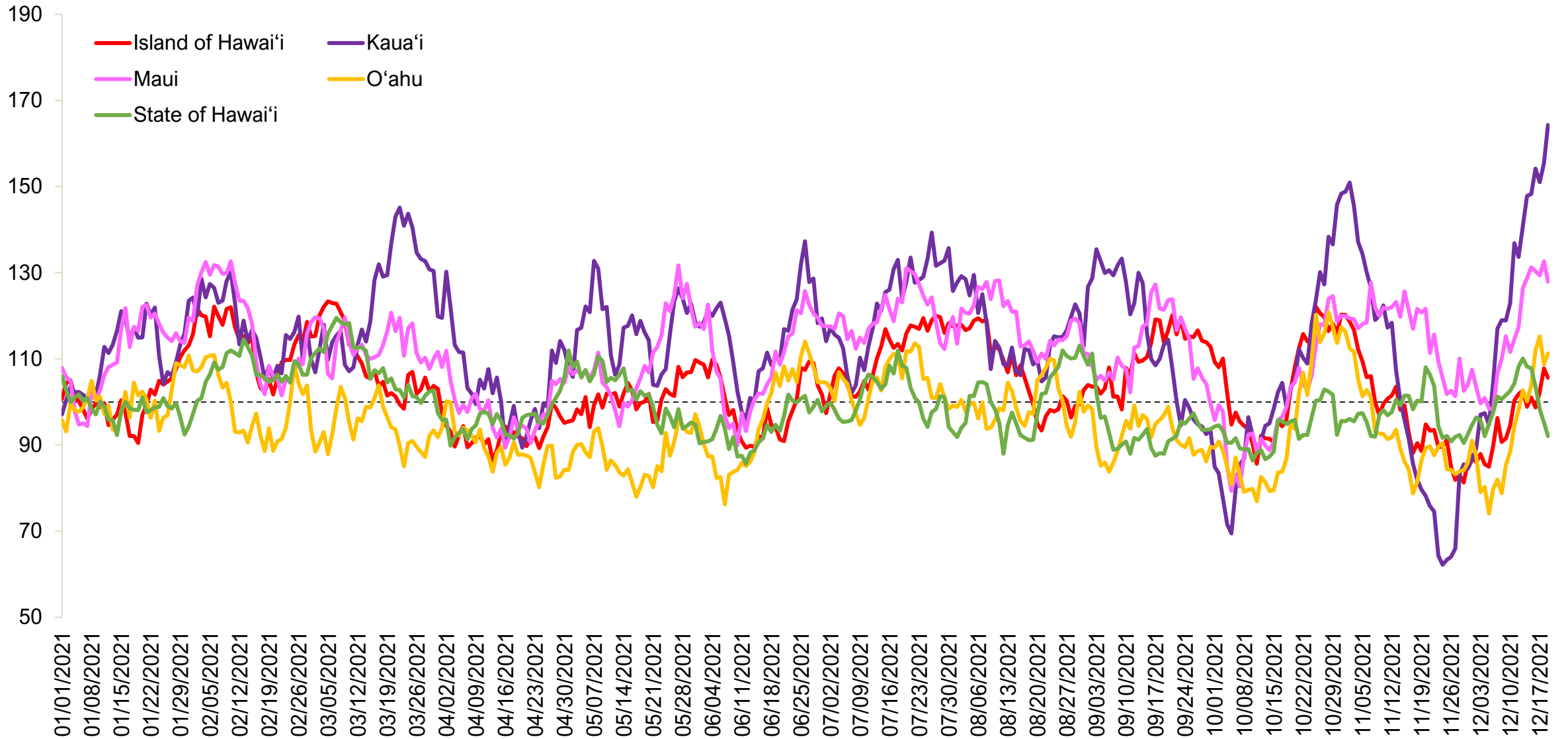
U.S. Consideration (% Yes) Two-Week Moving Average



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?

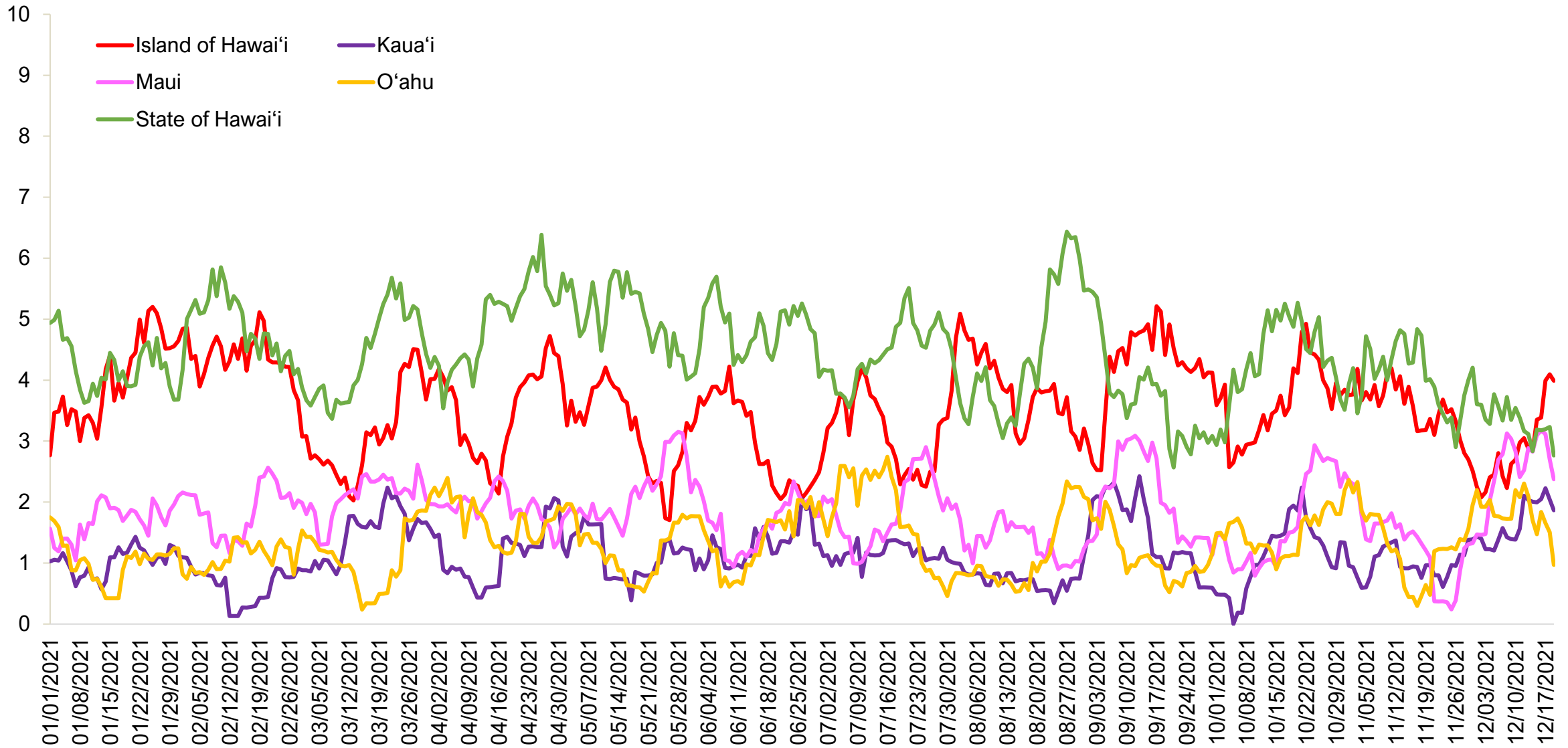
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Index of U.S. Consideration (% Yes) Two-Week Moving Average



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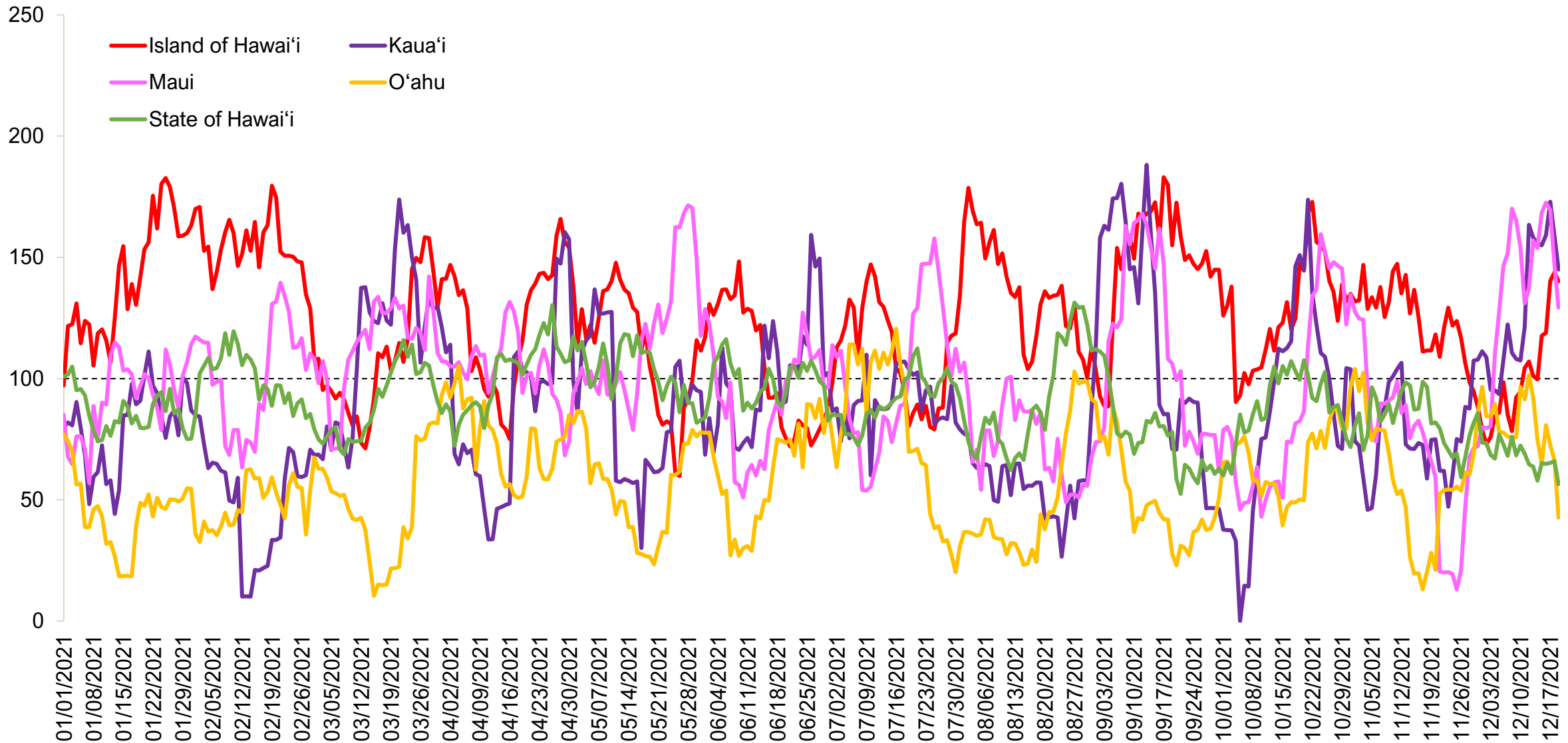
U.S. Purchase Intent (% Yes) Two-Week Moving Average



Question: (Net) Of the destinations considered, which are you most likely to visit?

Source: YouGov data as of December 20, 2021

Index of U.S. Purchase Intent (% Yes) Two-Week Moving Average



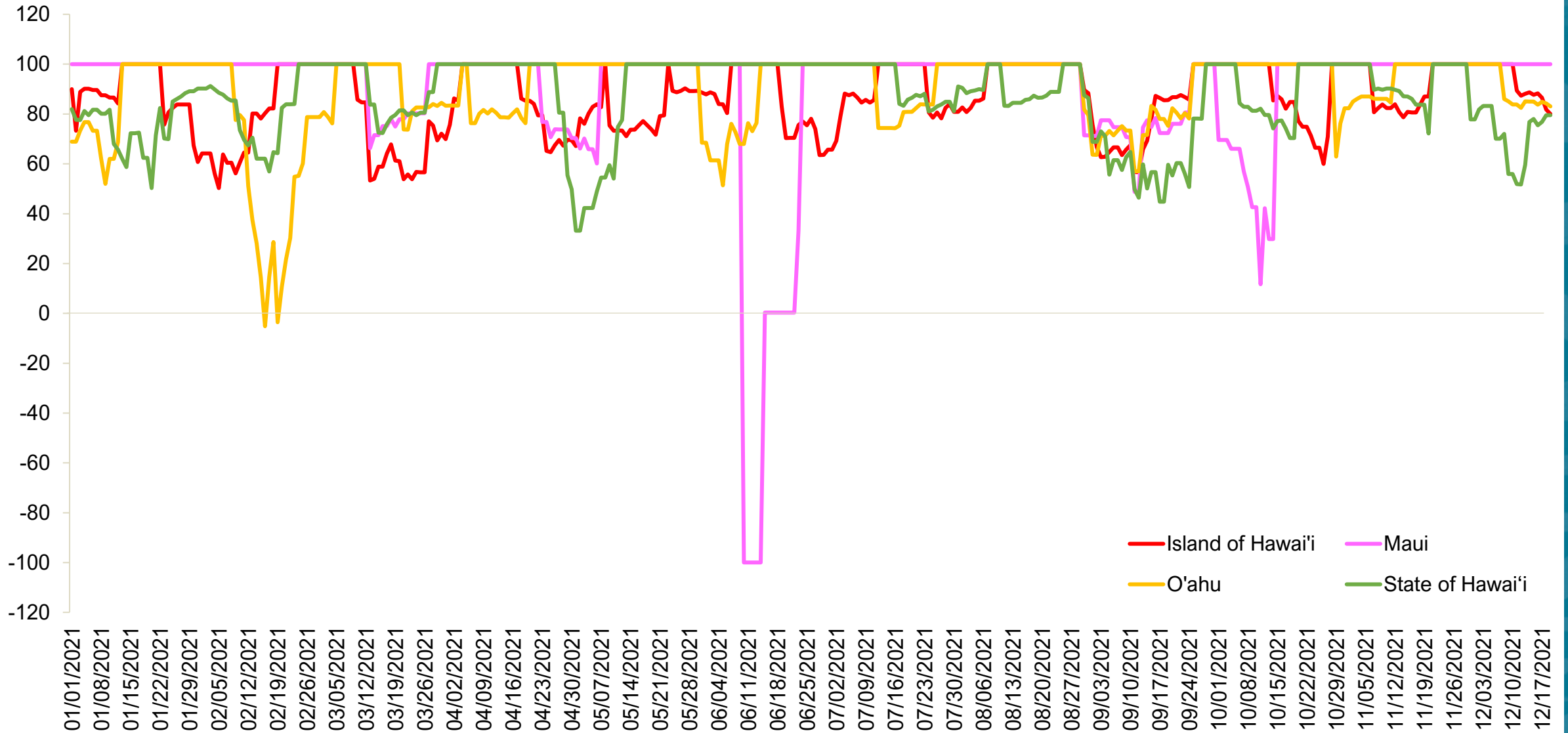
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Japan Destination Index Trends



Japan Buzz Net Score Two-Week Moving Average

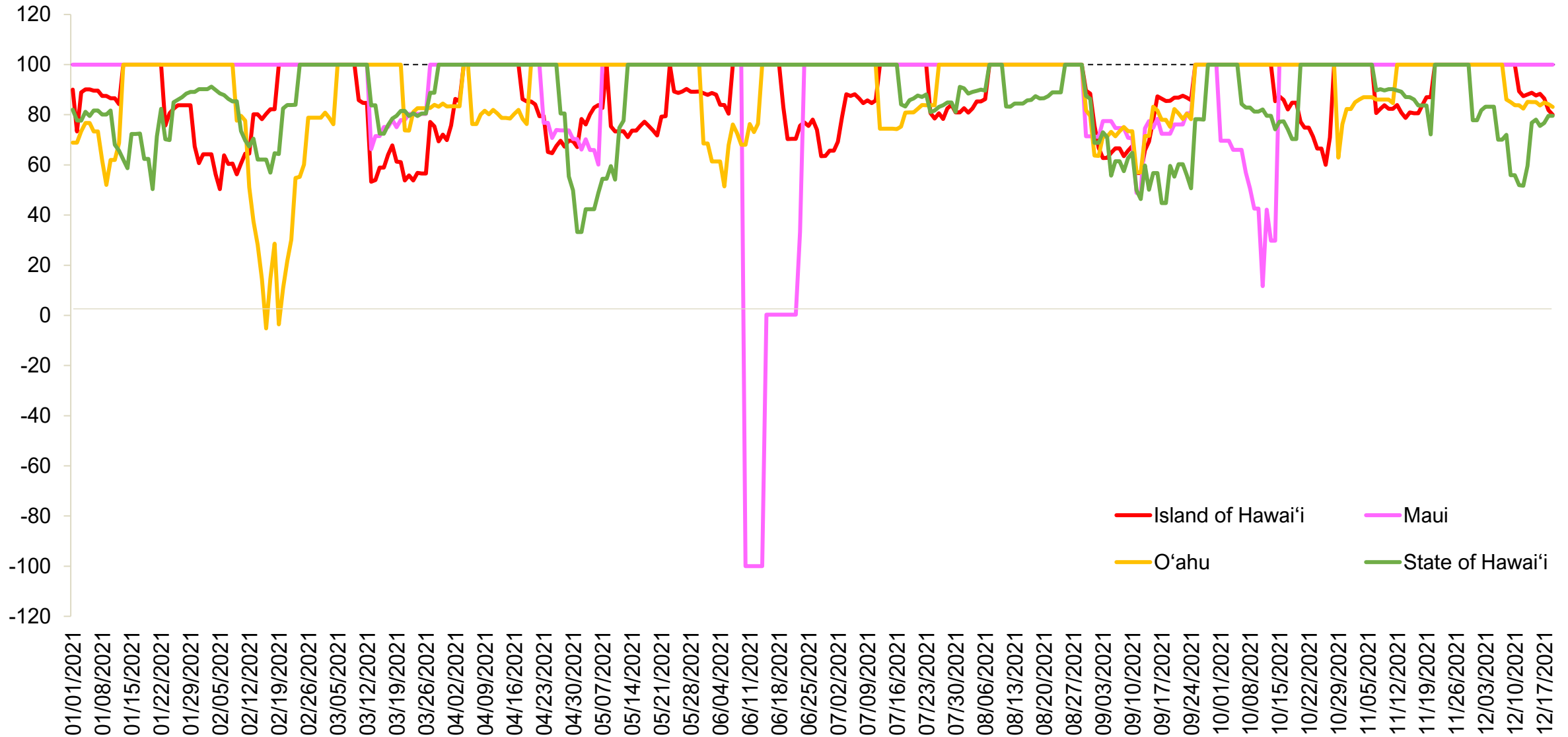


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*Kaua'i is not included due to low response volume

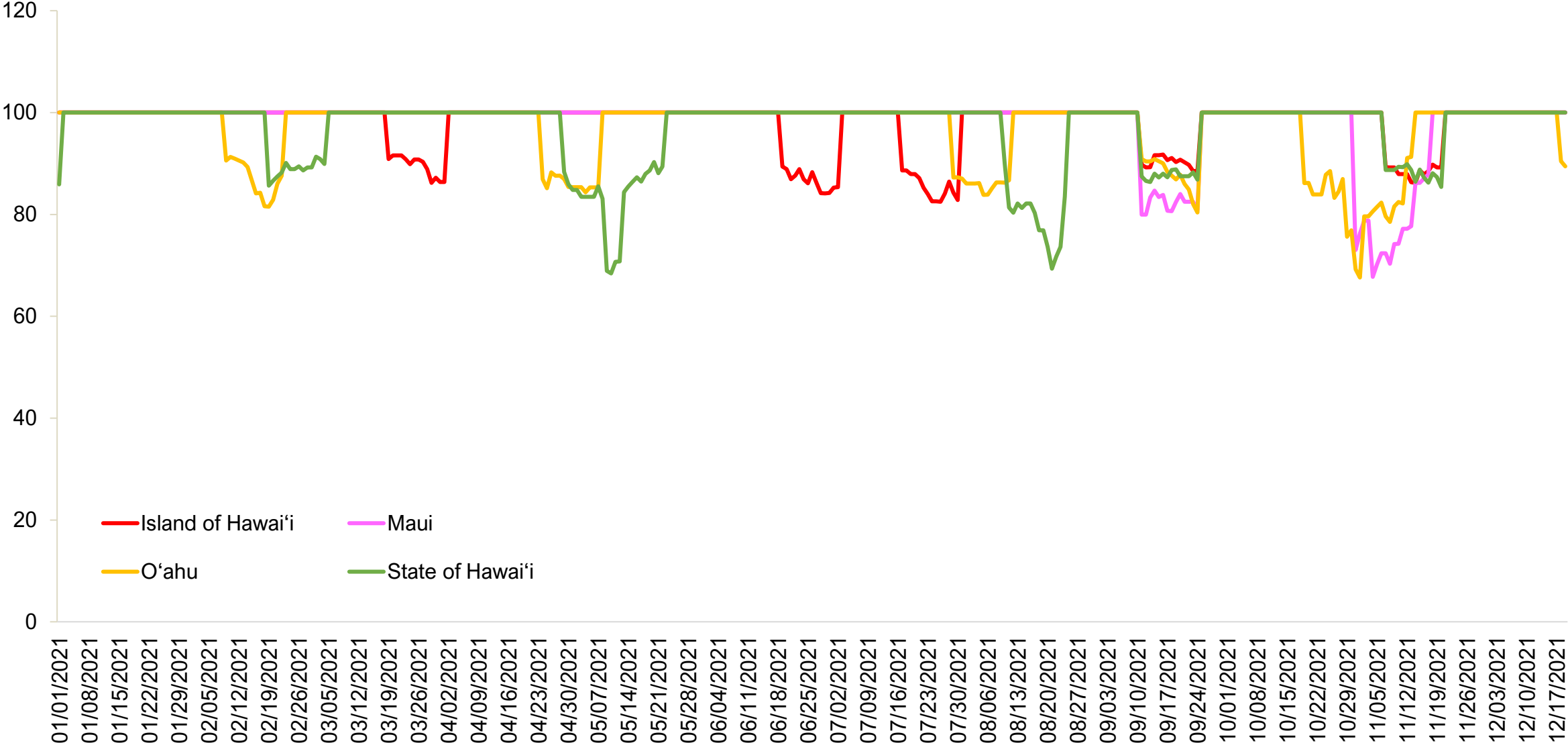
Source: YouGov data as of December 20, 2021

Index of Japan Buzz Net Score Two-Week Moving Average



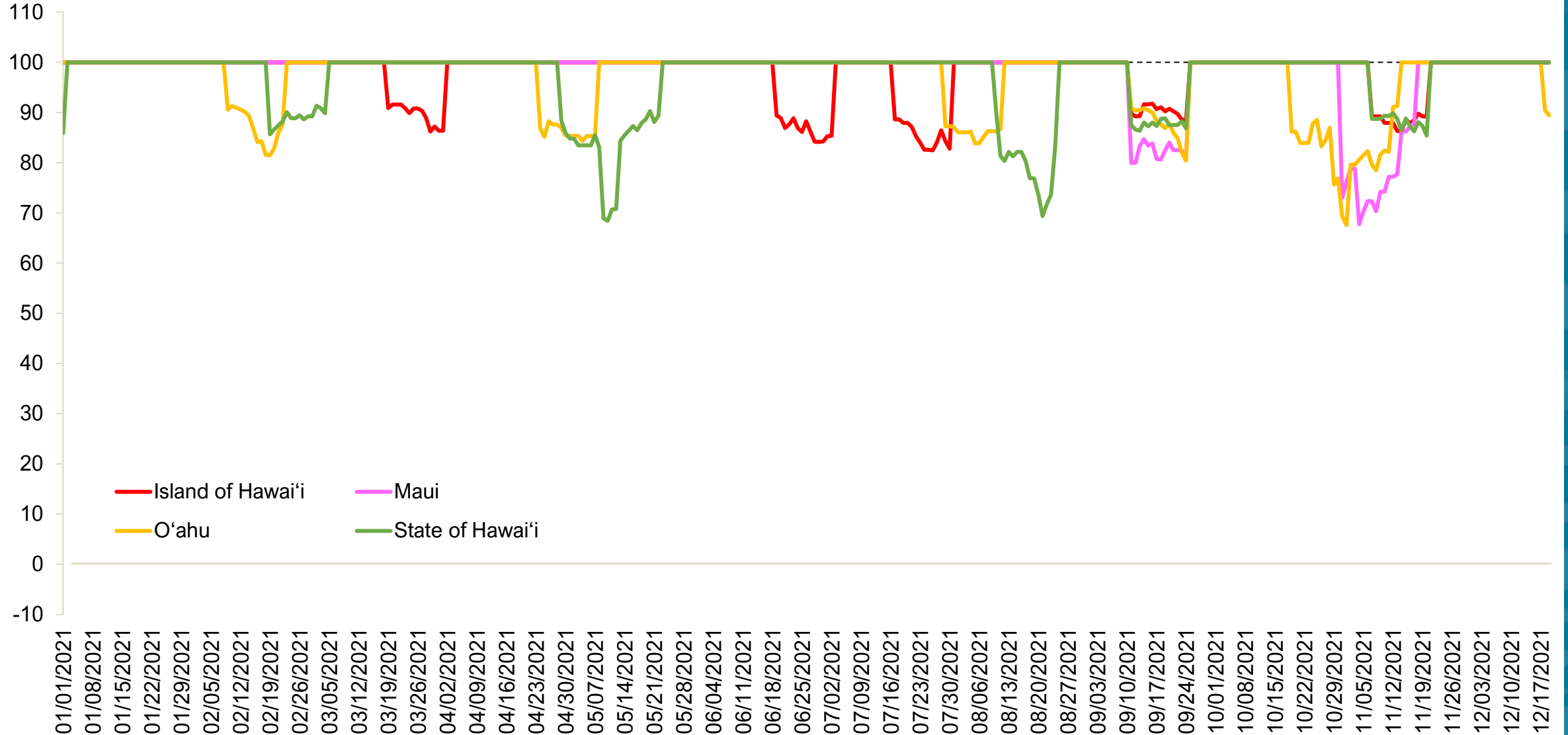
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Japan Recommend Net Score Two-Week Moving Average



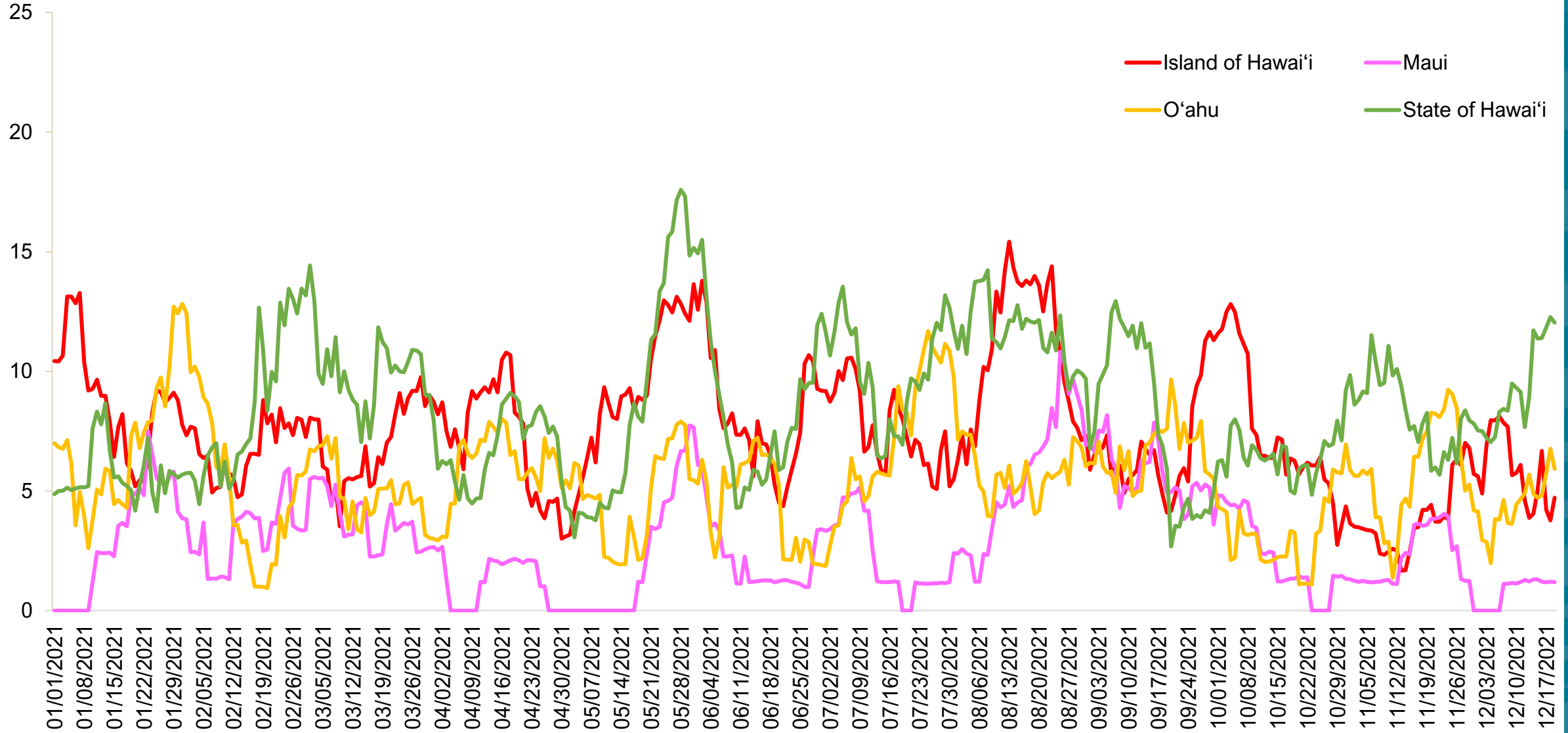
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Index of Japan Recommend Net Score Two-Week Moving Average



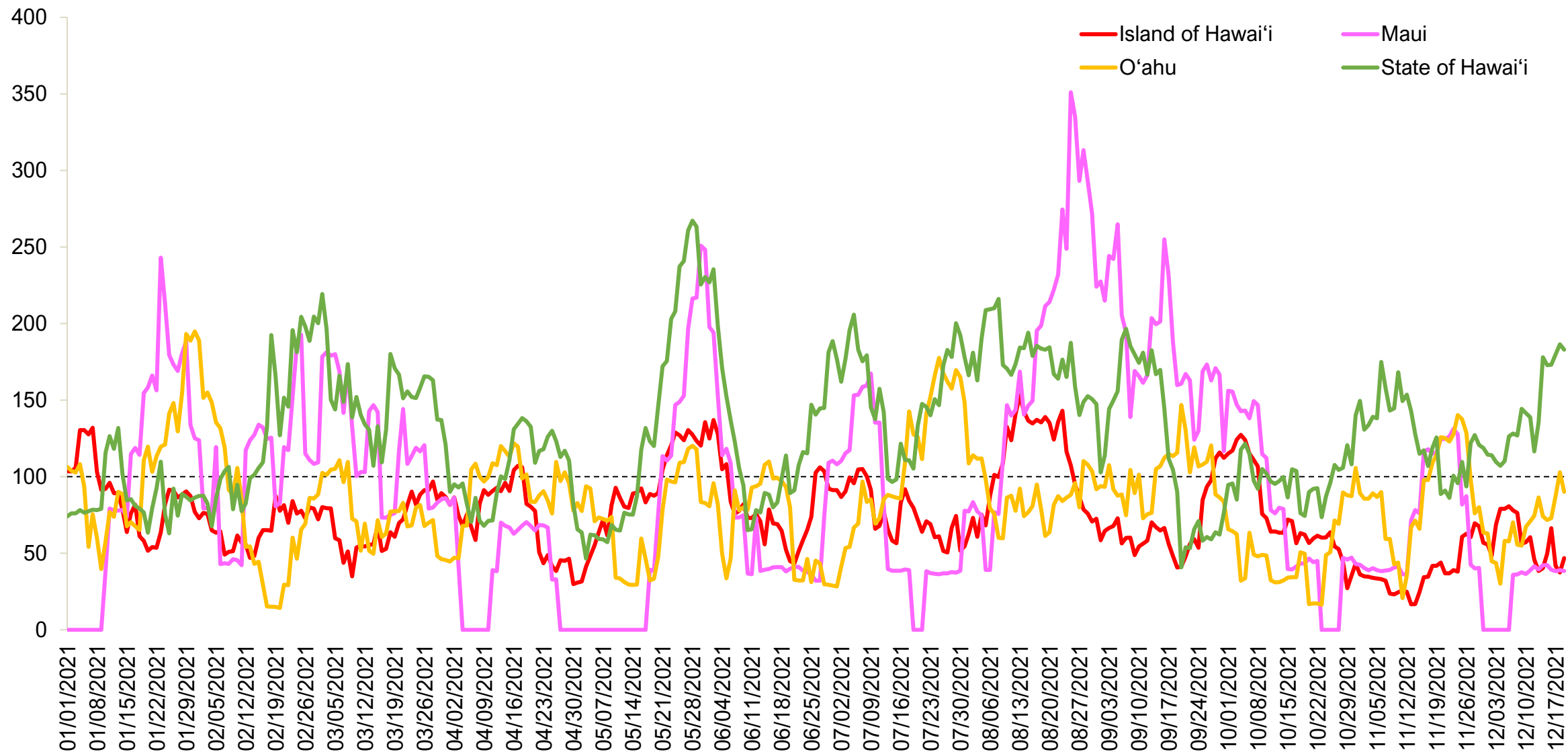
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Japan Word of Mouth Exposure (% Yes) Two-Week Moving Average



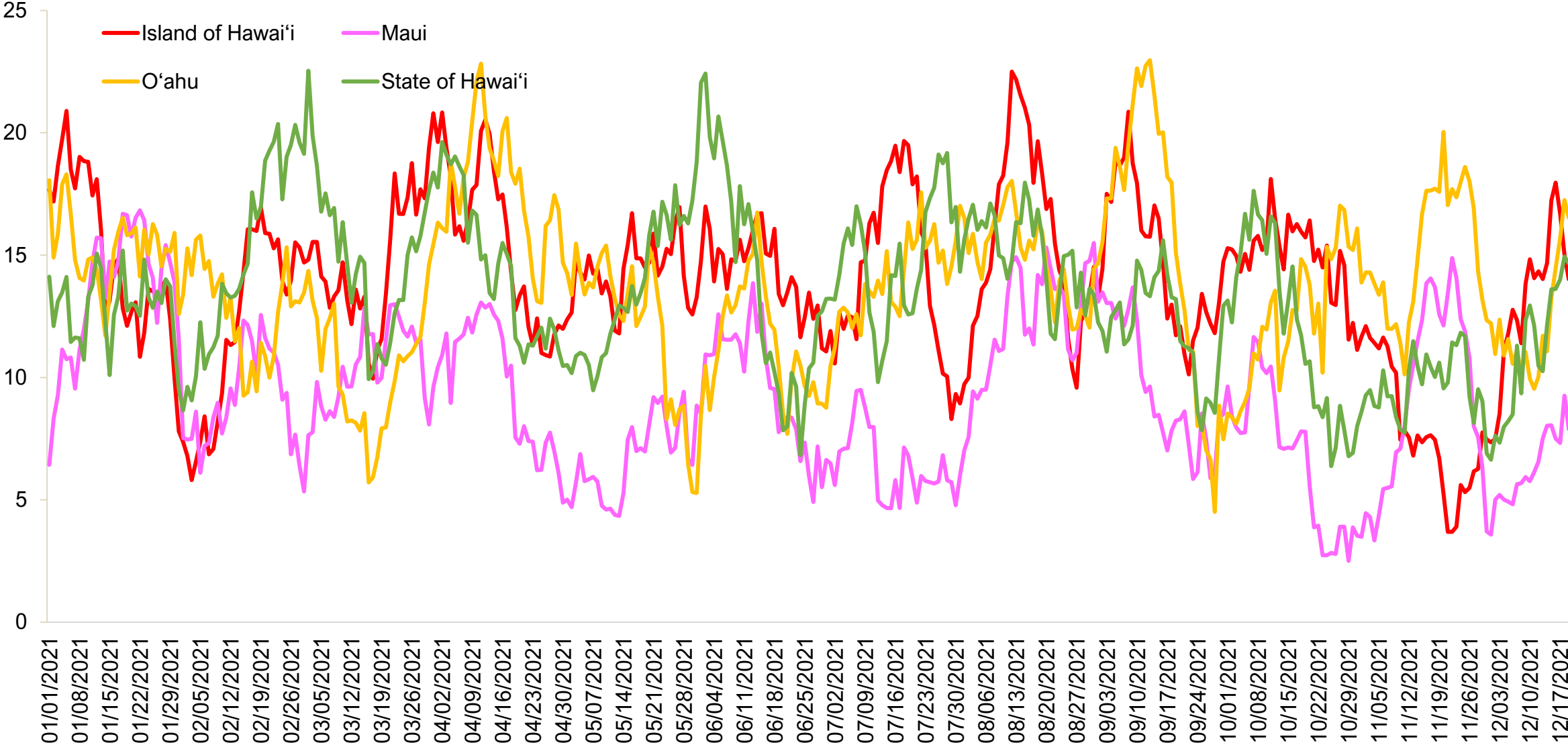
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Index of Japan Word of Mouth Exposure (% Yes) Two-Week Moving Average



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Japan Consideration (% Yes) Two-Week Moving Average

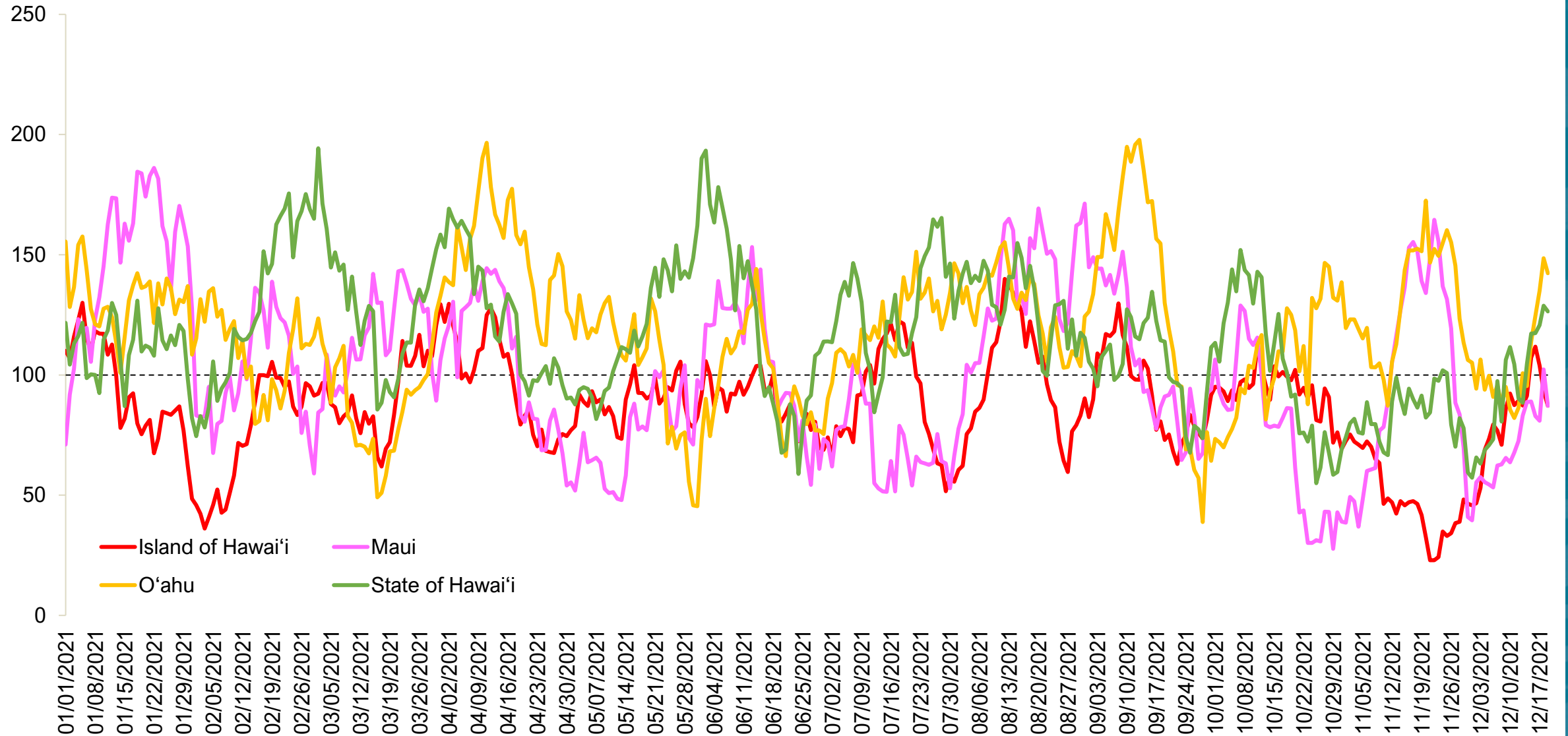


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Index of Japan Consideration (% Yes) Two-Week Moving Average

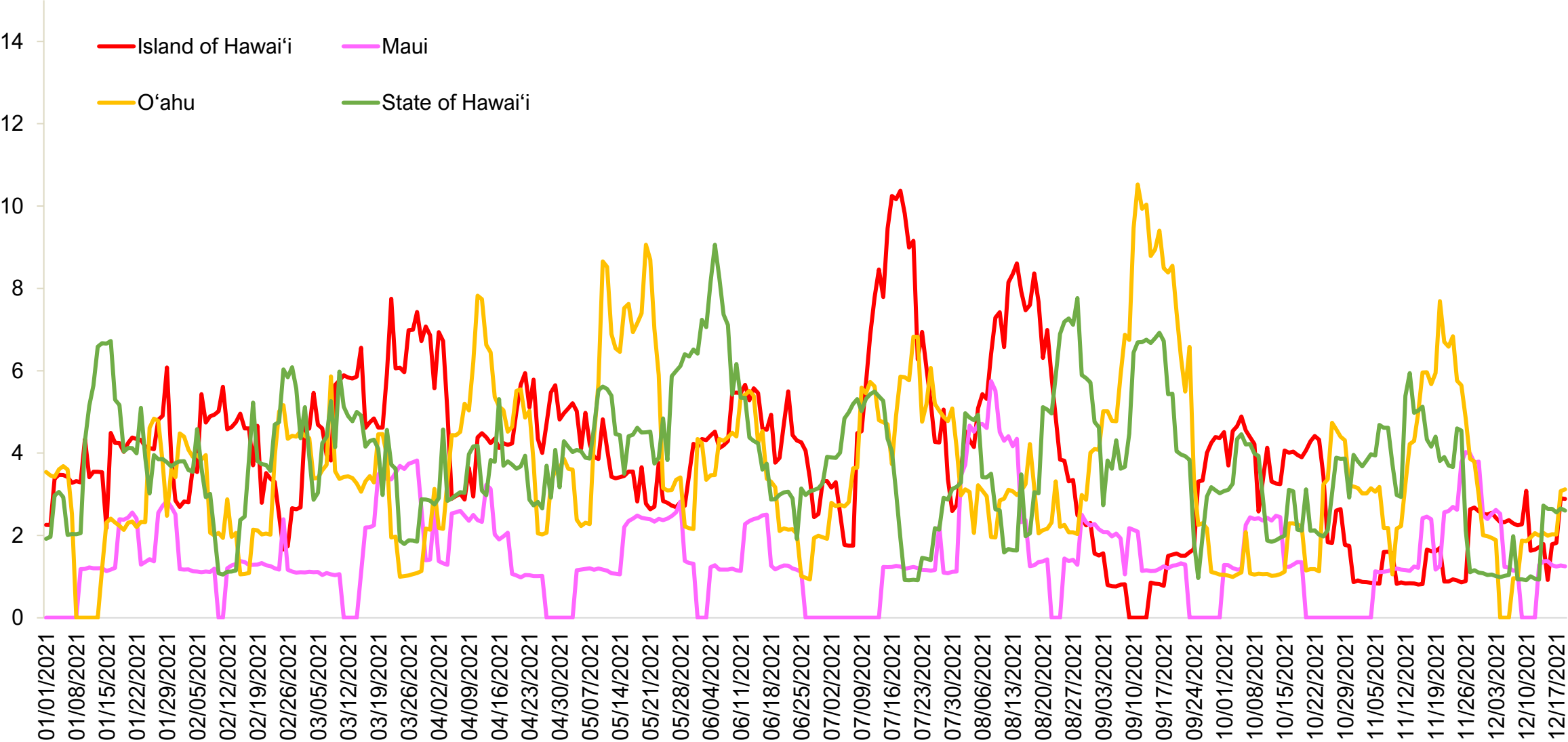


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Japan Purchase Intent (% Yes) Two-Week Moving Average

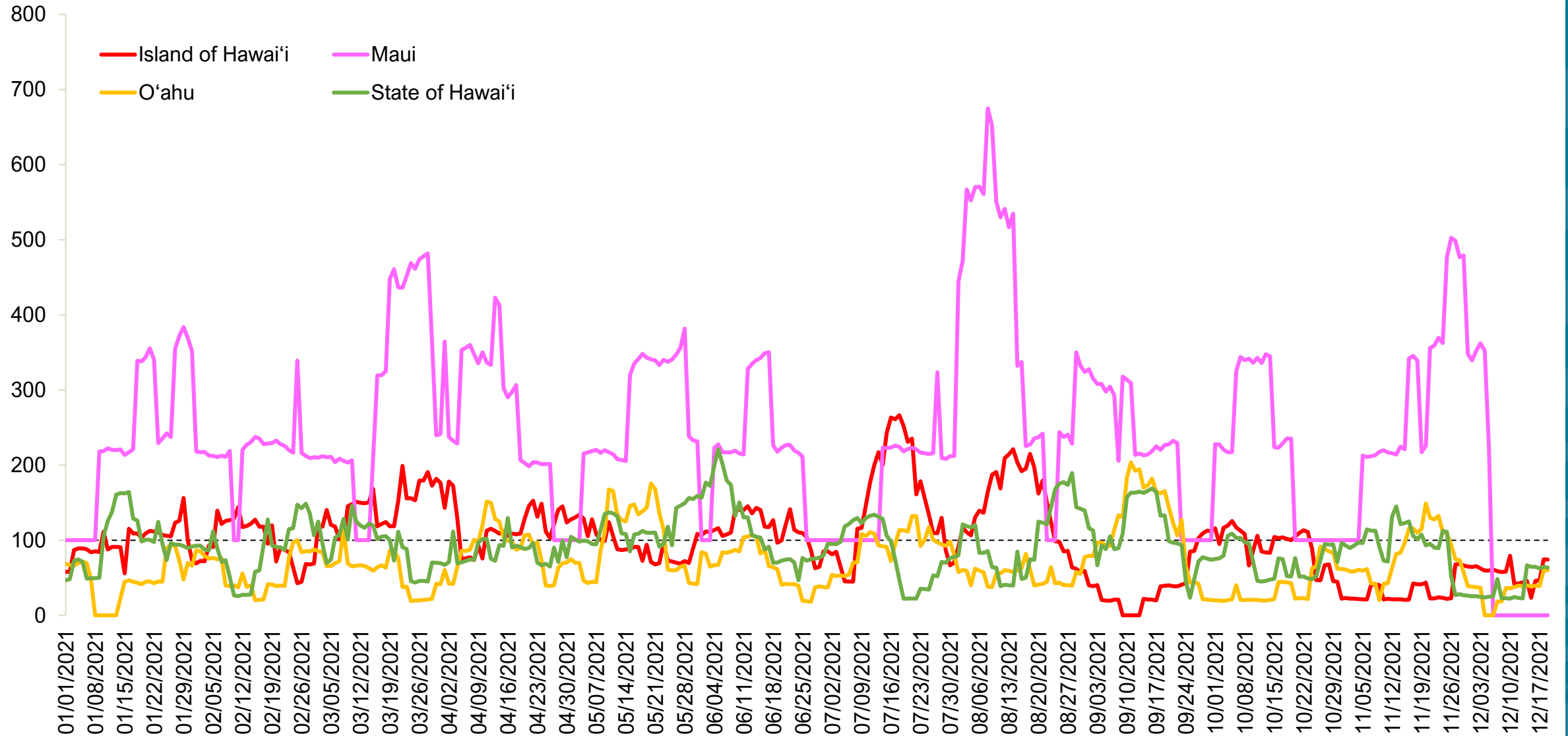


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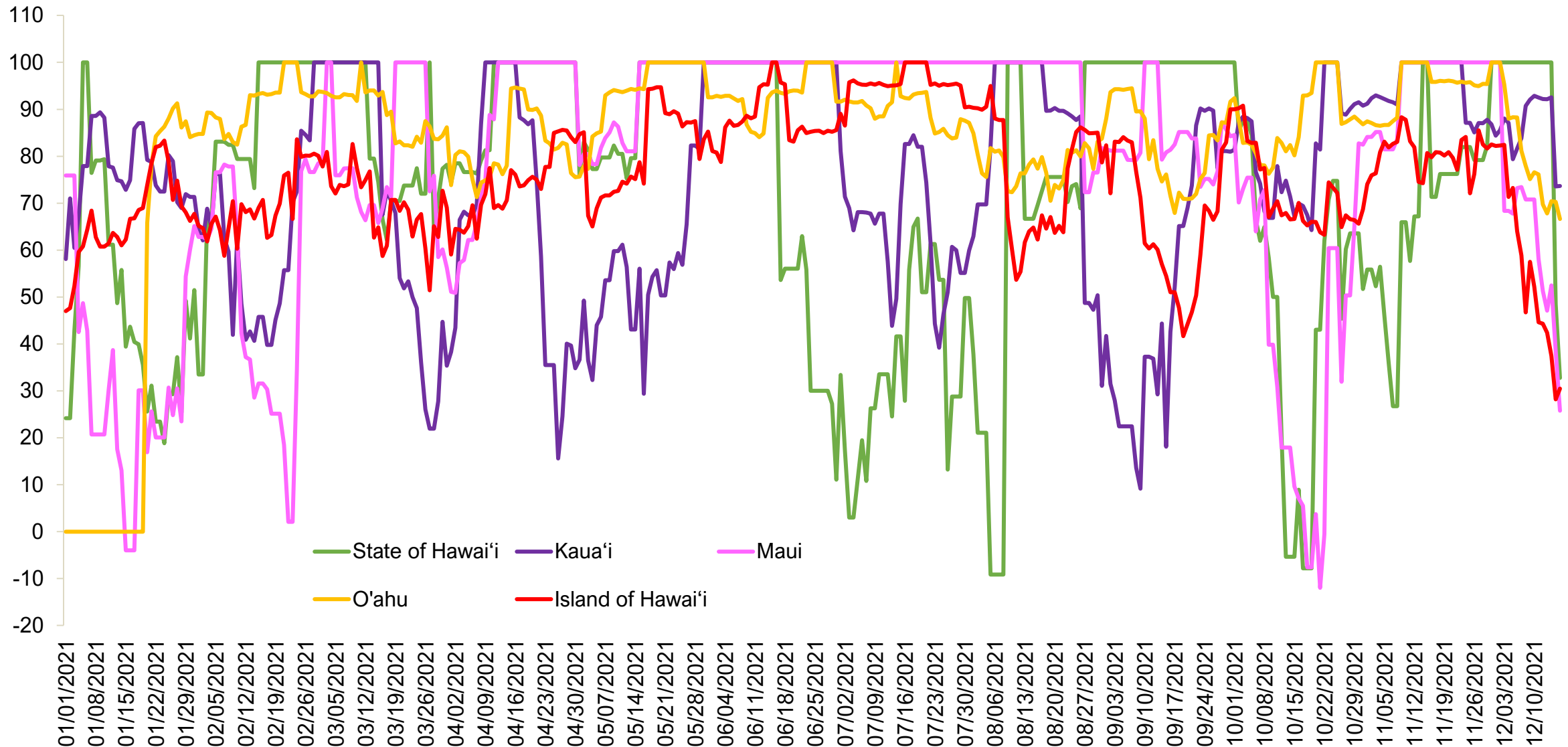
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Canada Destination Index Trends



Canada Buzz Net Score Two-Week Moving Average

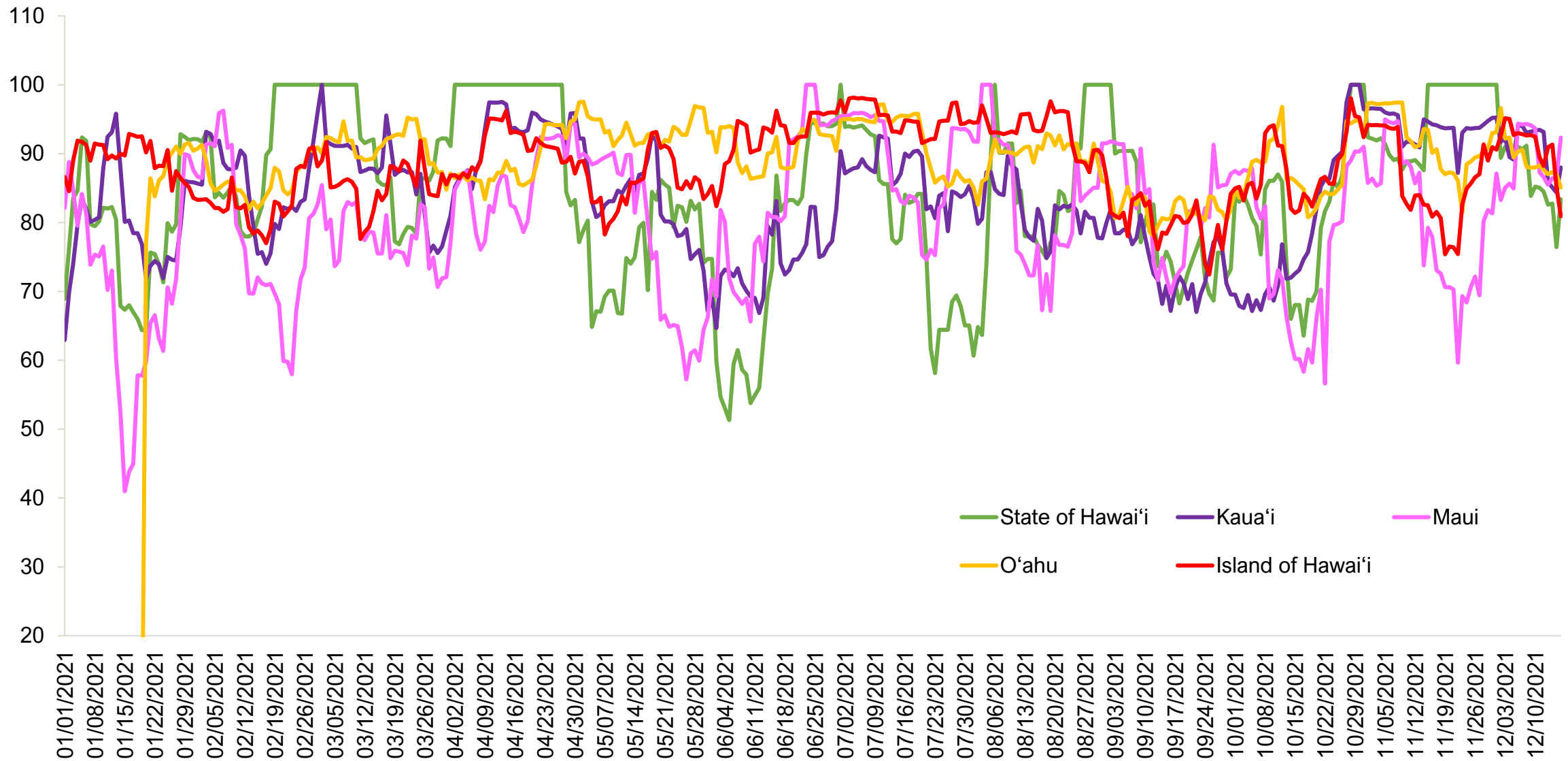


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**Island of Hawai'i data not available until 1/20/2021*

Source: YouGov data as of December 20, 2021

Canada Recommend Net Score Two-Week Moving Average

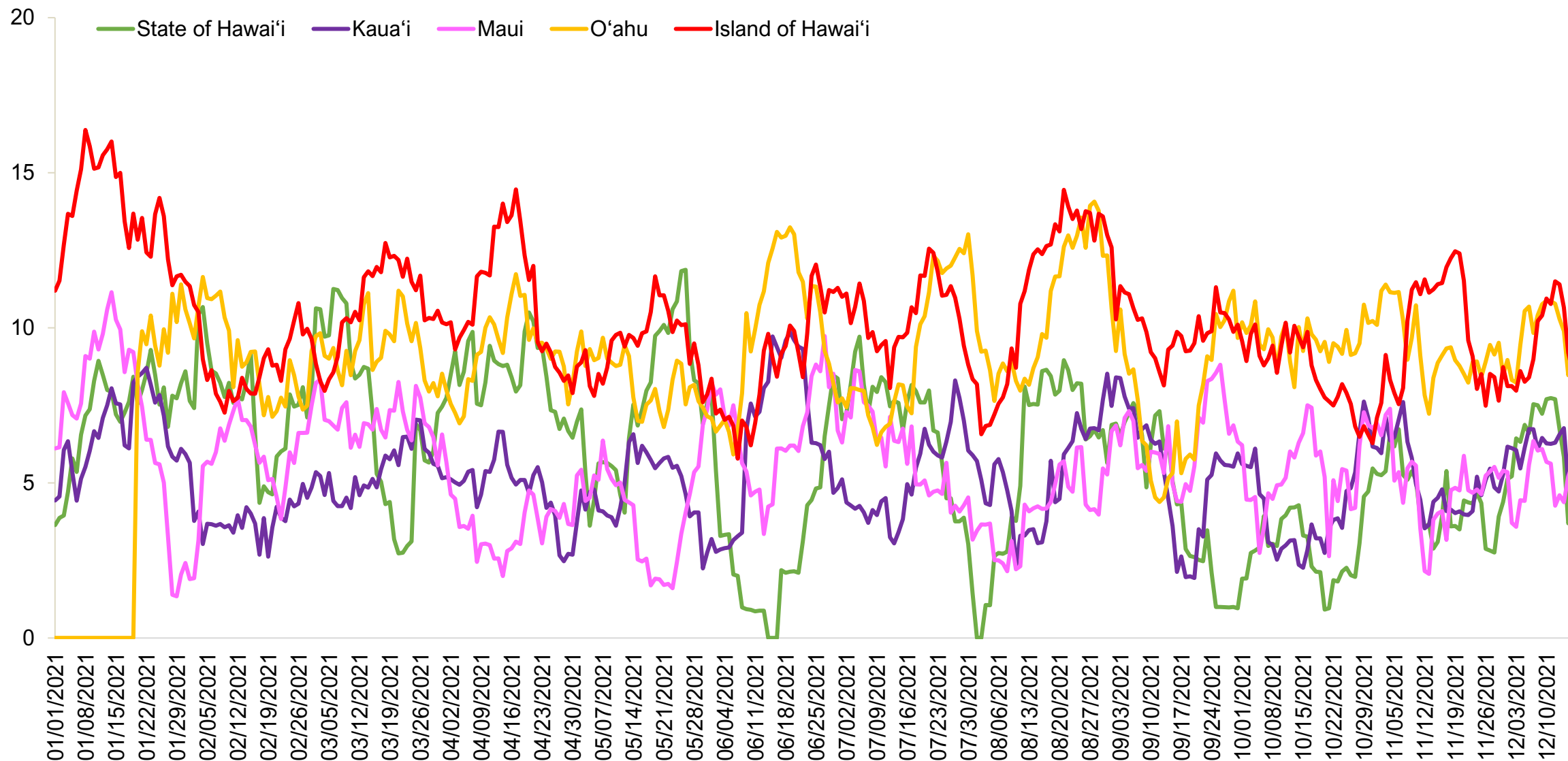


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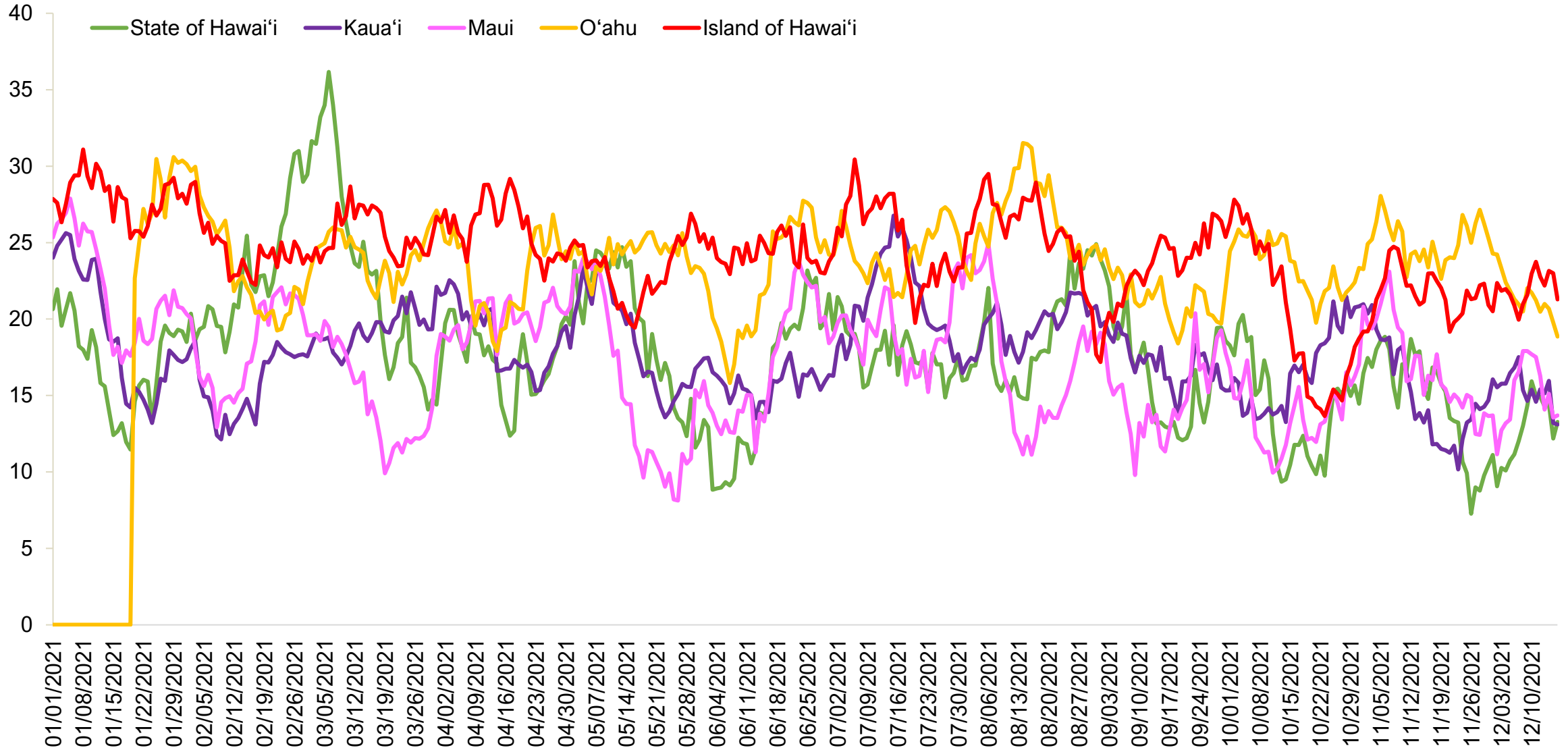


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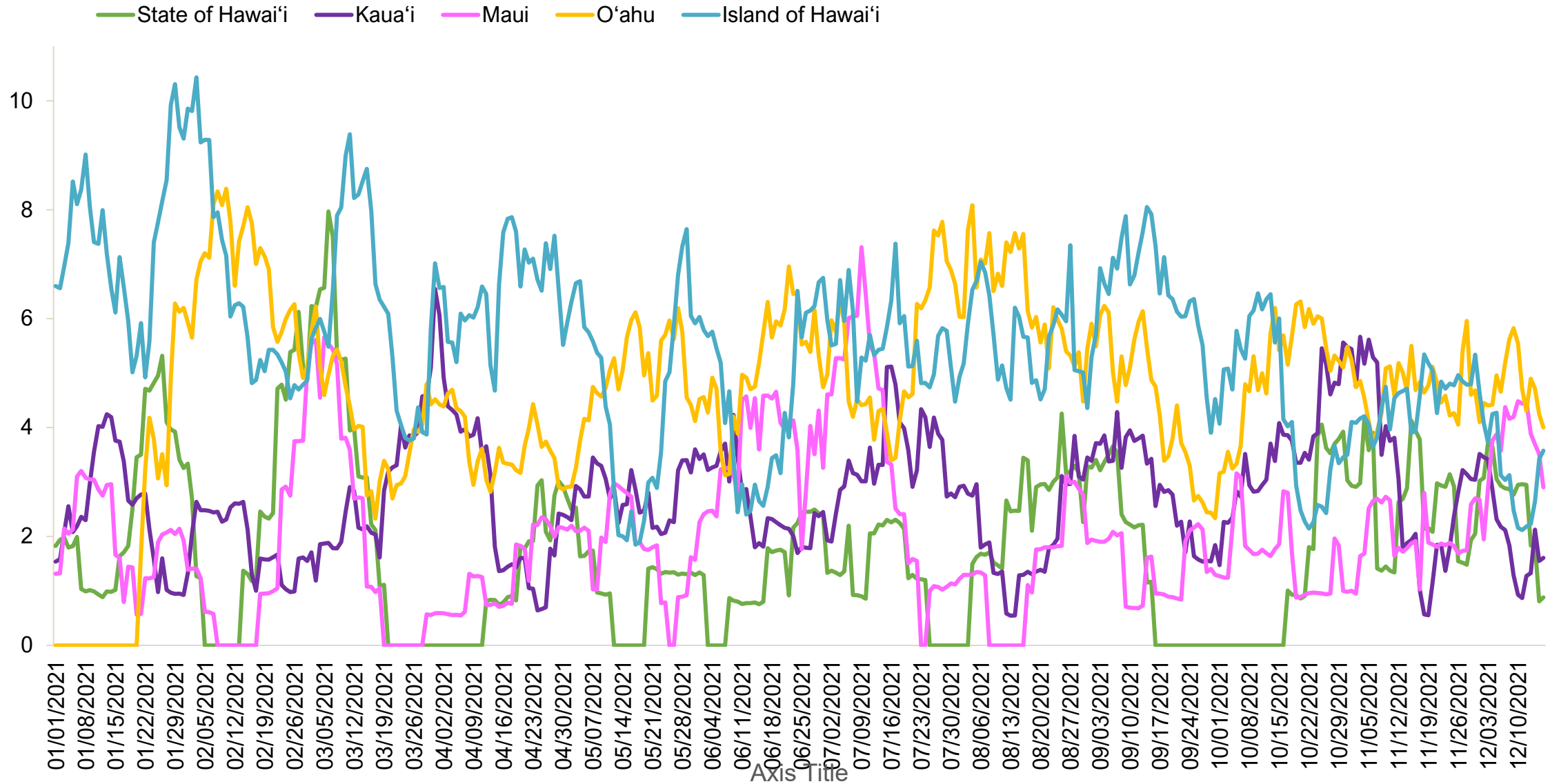


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