

YouGov Destination Index Trends Responsible Travelers Segment

August 23, 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 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

August 22-26, 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

August 23, 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

August 22, 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.

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

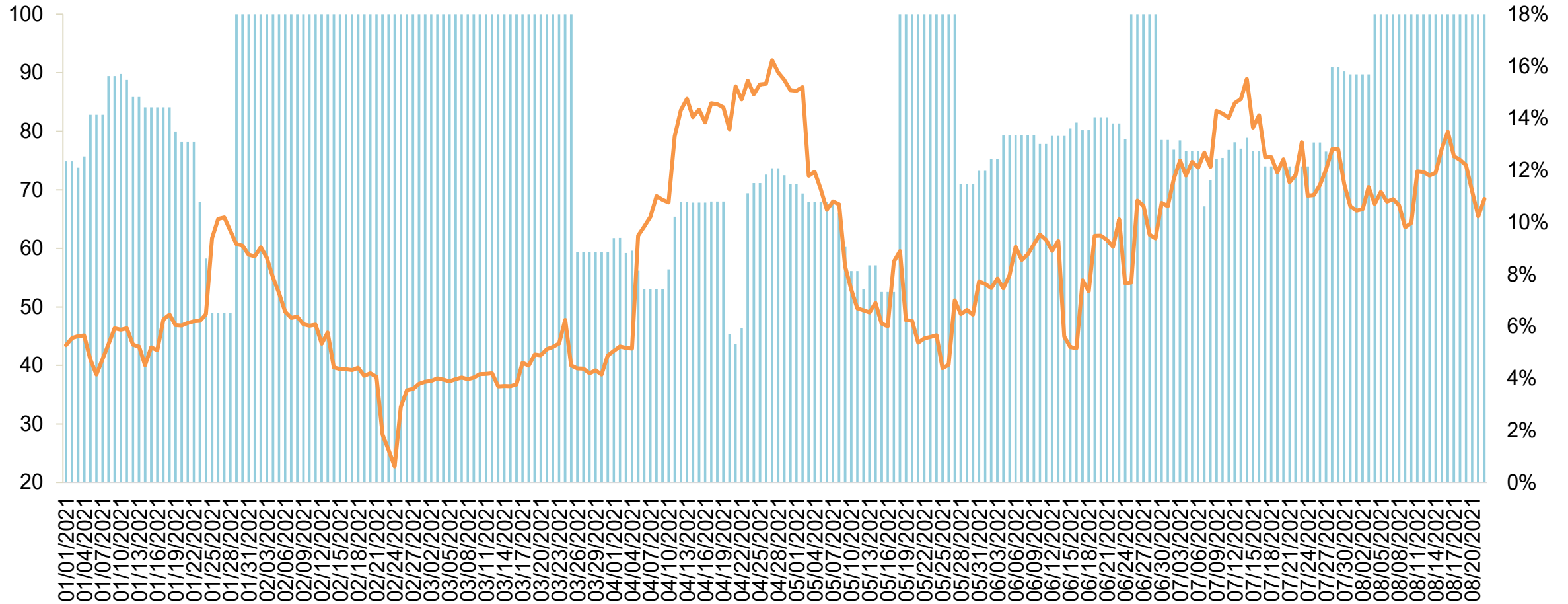
June 24, 2021 – Gov. Ige announces that individuals vaccinated in the U.S. will be able to bypass the testing/quarantine requirement with proof of vaccination through the state's Safe Travels program

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

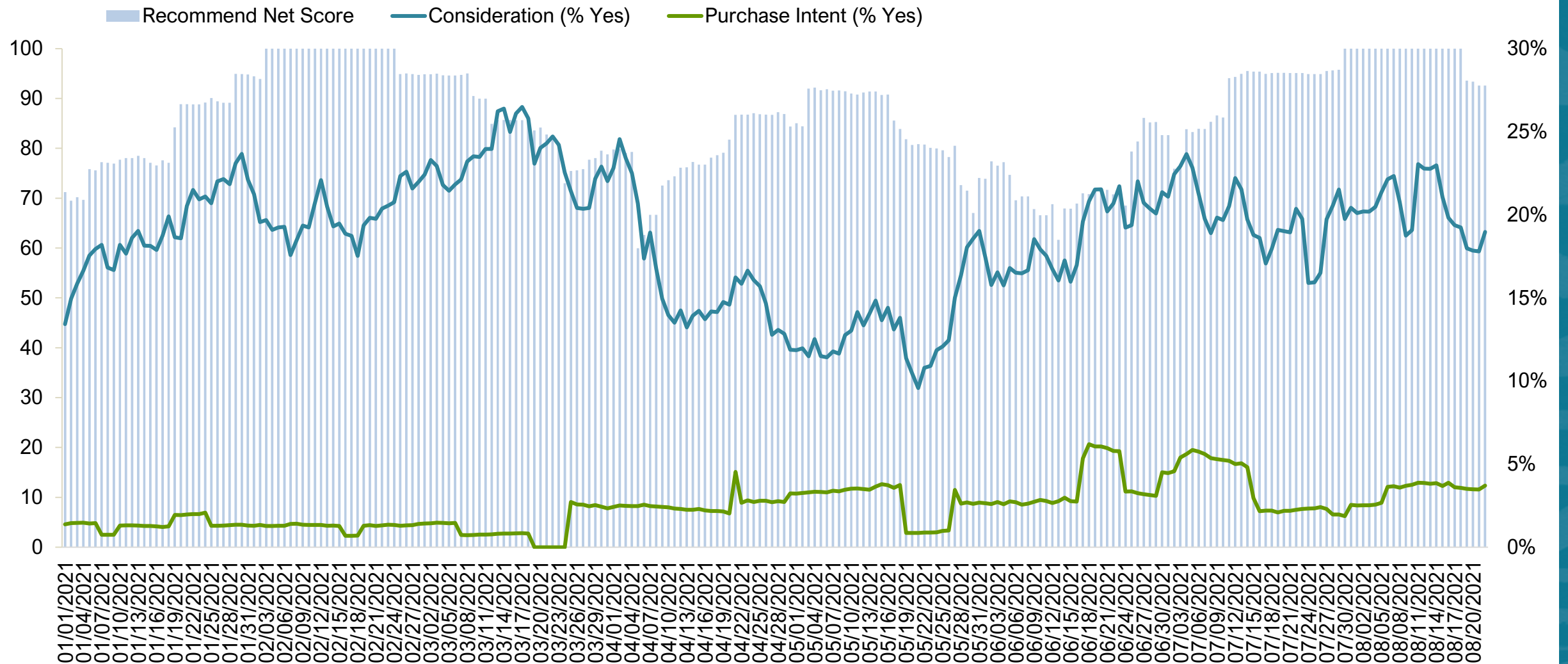
■ Buzz Net Score — Word of Mouth Exposure (% Yes)



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?

Word of Mouth Exposure Question: (Net) Which of the following destinations have you talked about with friends and family in the PAST TWO WEEKS (whether in-person, online, or through social media?)

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



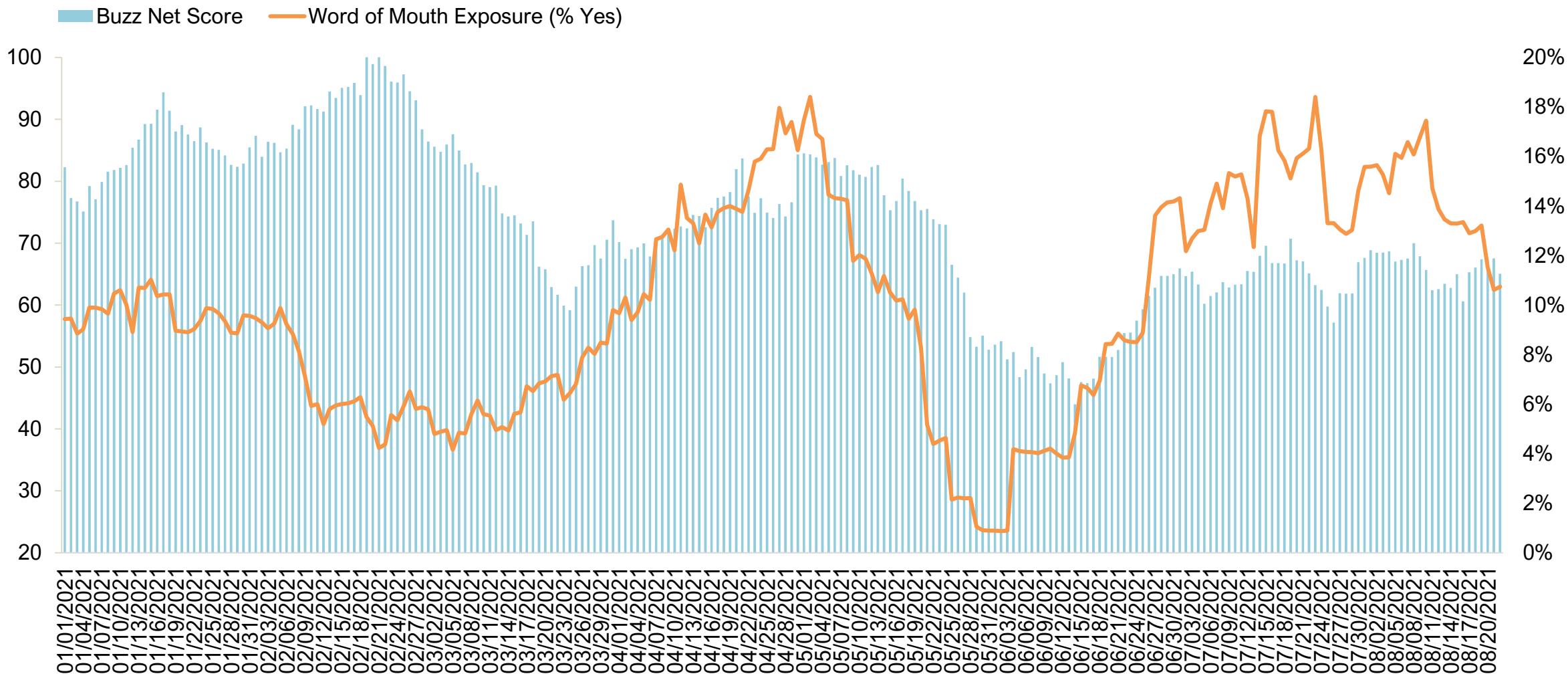
Recommend Question: (Net) Which of the following destinations would you RECOMMEND to a friend or colleague? / And which of the following destinations would you tell a friend or colleague to AVOID?
Consideration Question: (Net) Thinking about your next vacation by air alone or with friends, family, a 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)

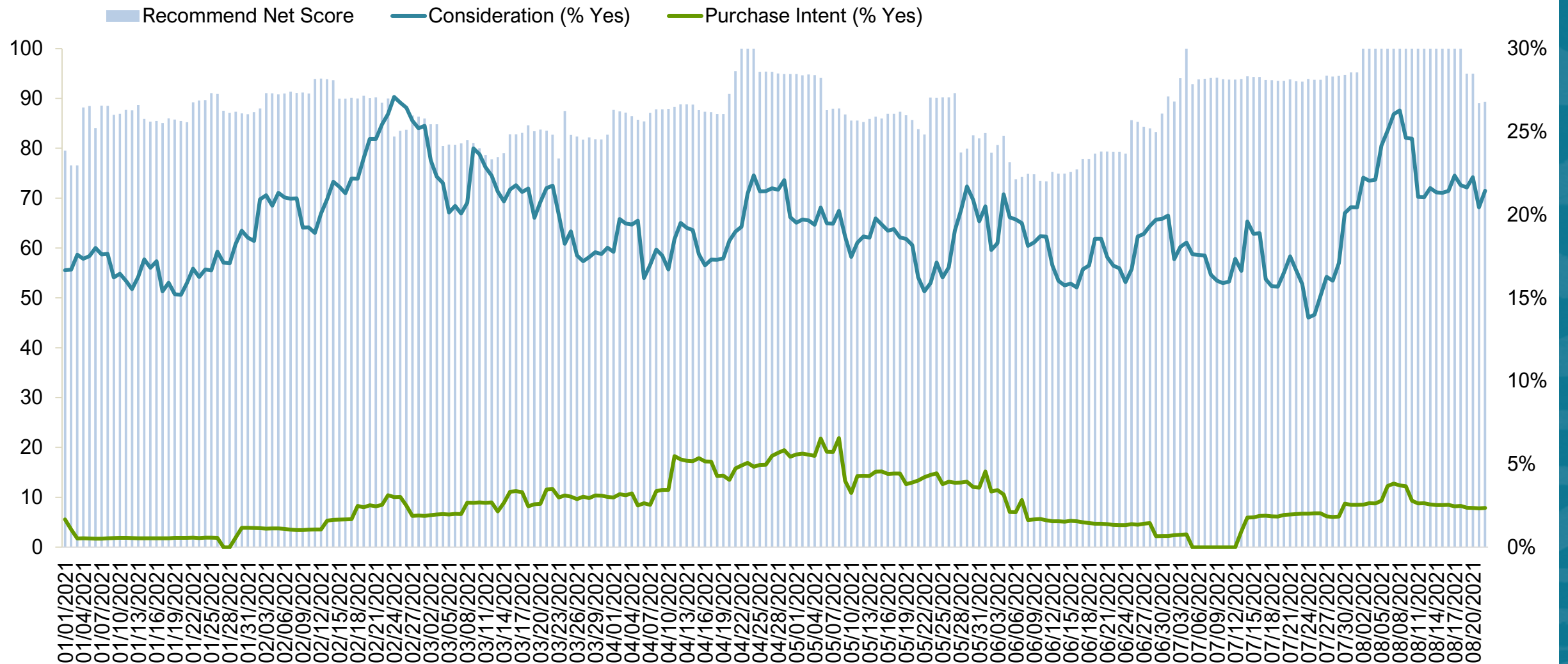
U.S. Four-Week Moving Average



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



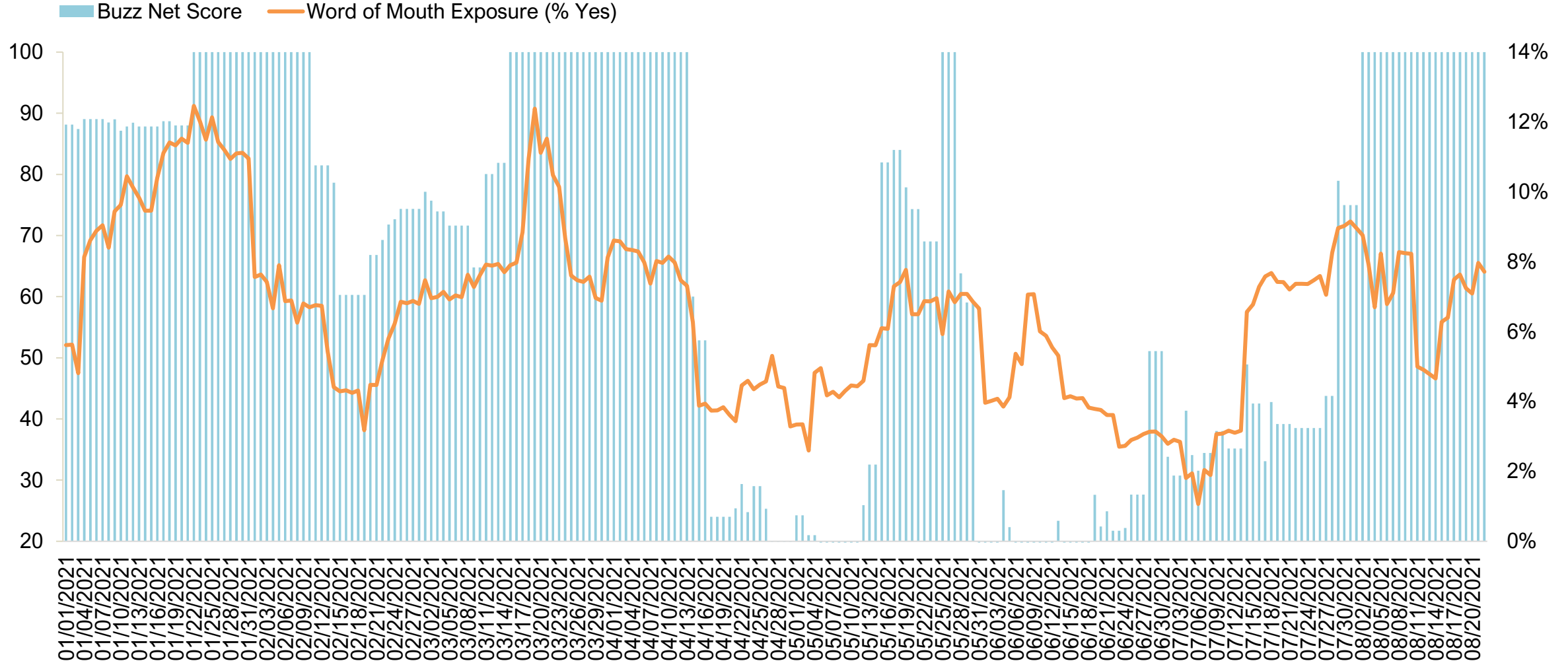
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Purchase Intent Question: (Net) Of the destinations considered, which are you most likely to visit?

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



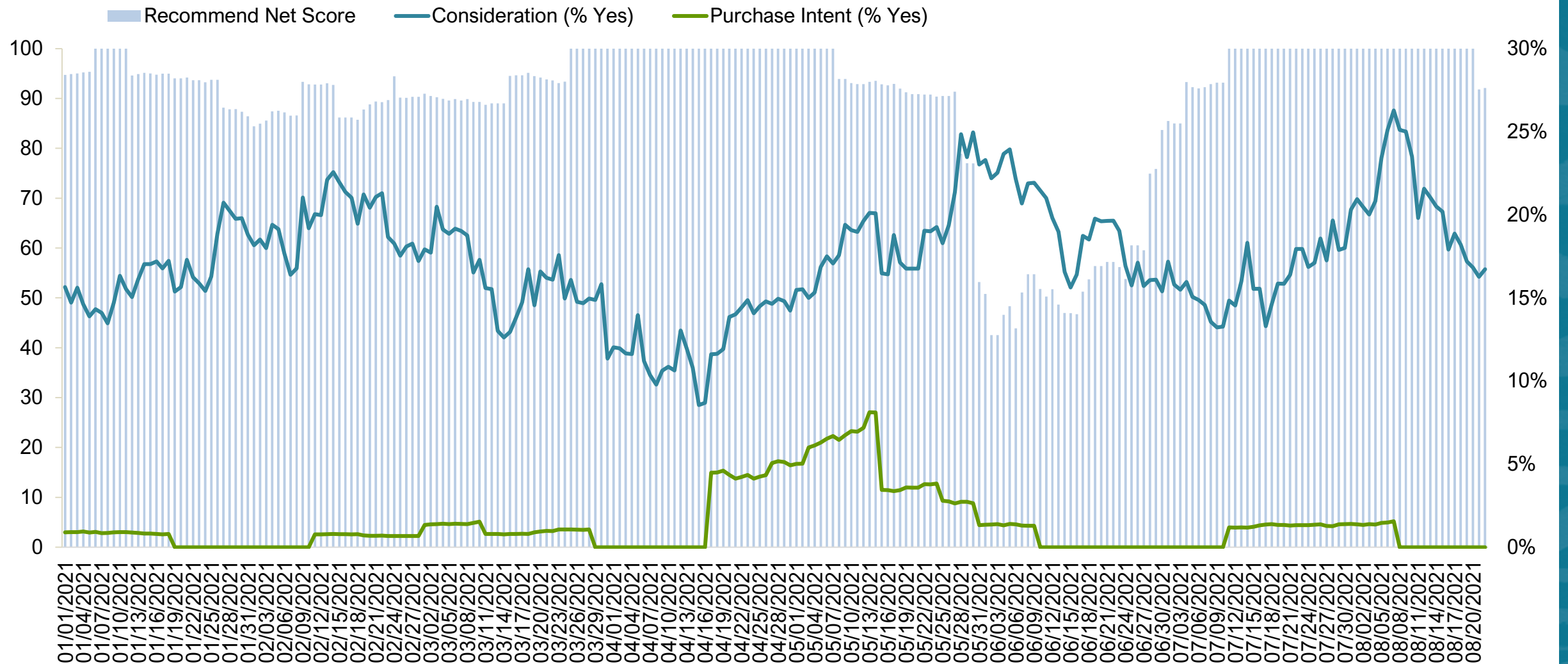
Kaua'i – Buzz Net Score and Word of Mouth Exposure (% Yes) U.S. Four-Week Moving Average



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?

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

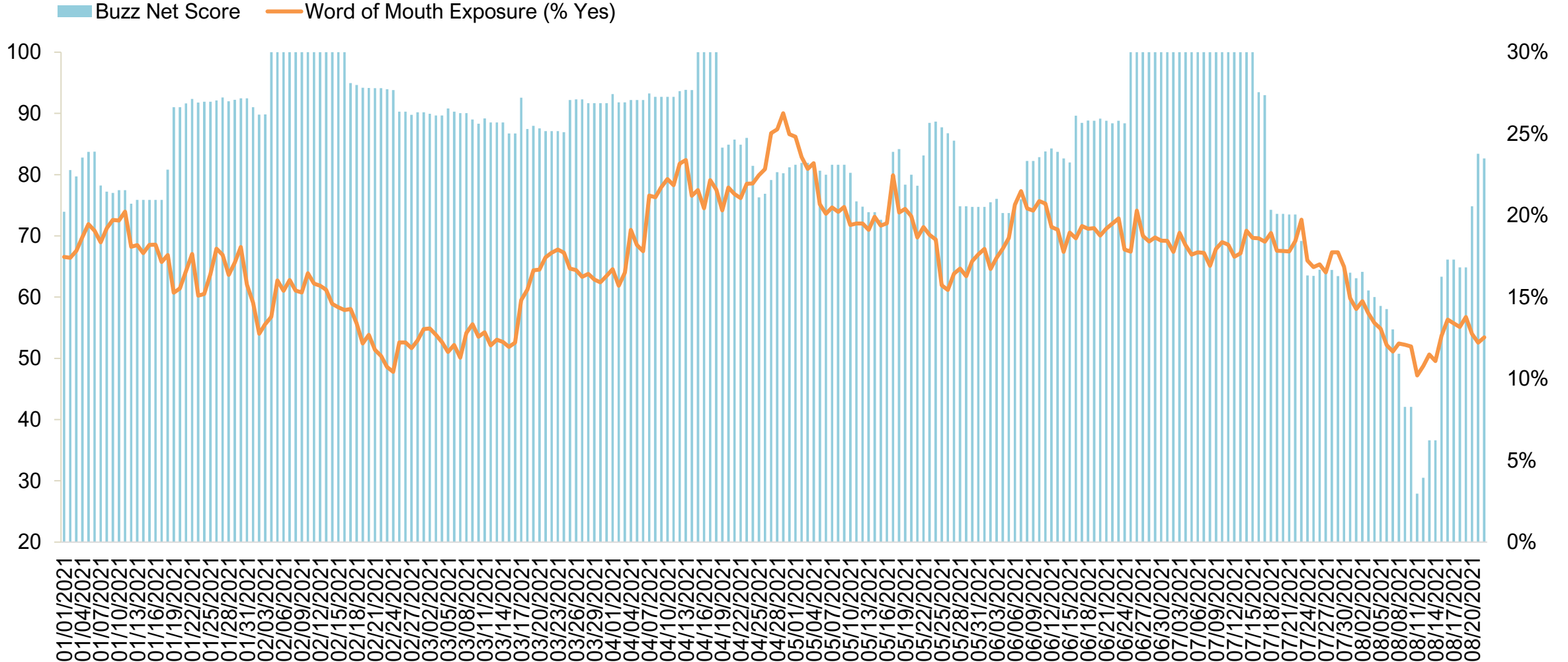


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U.S. Destination Index Trends Responsible Travelers Segment Island of Hawai'i



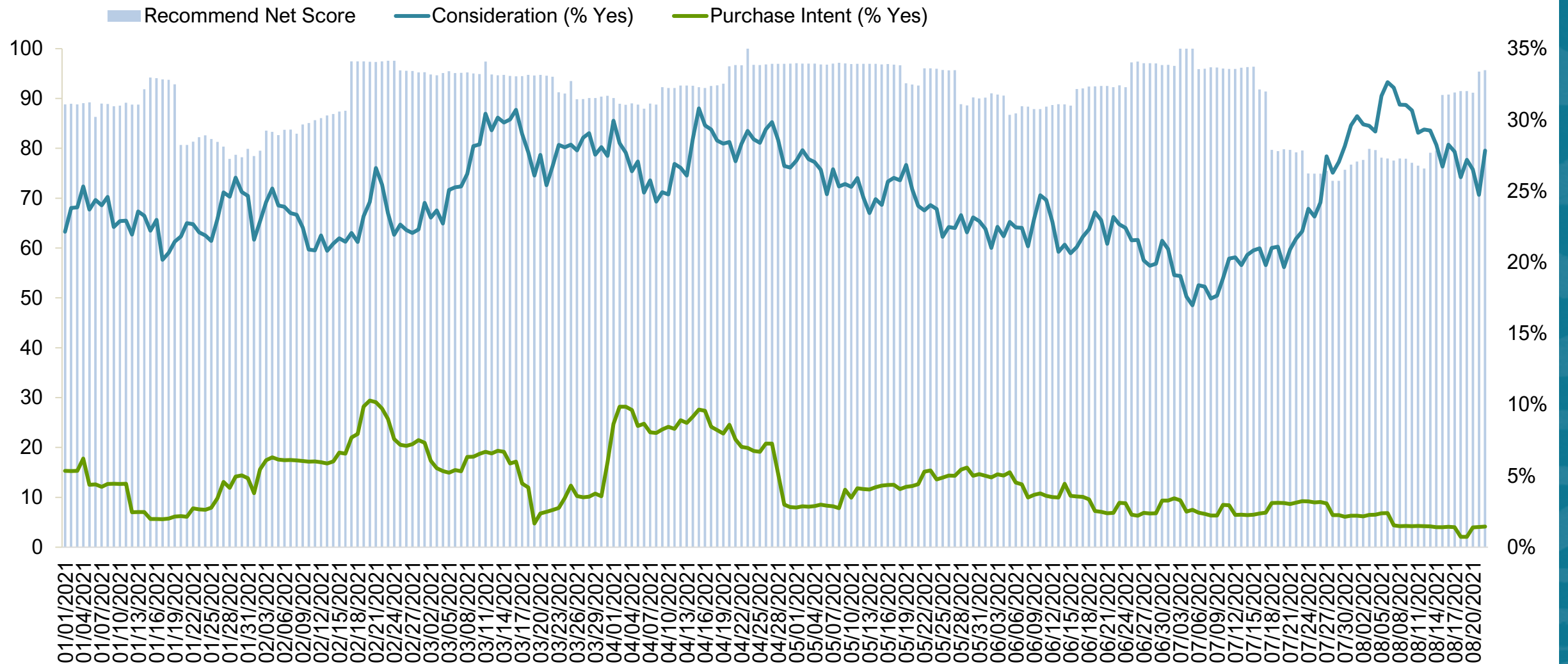
Island of Hawai'i – Buzz Net Score and Word of Mouth Exposure (% Yes) U.S. Four-Week Moving Average



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?

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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?
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