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

October 18-26, 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

October 188, 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."

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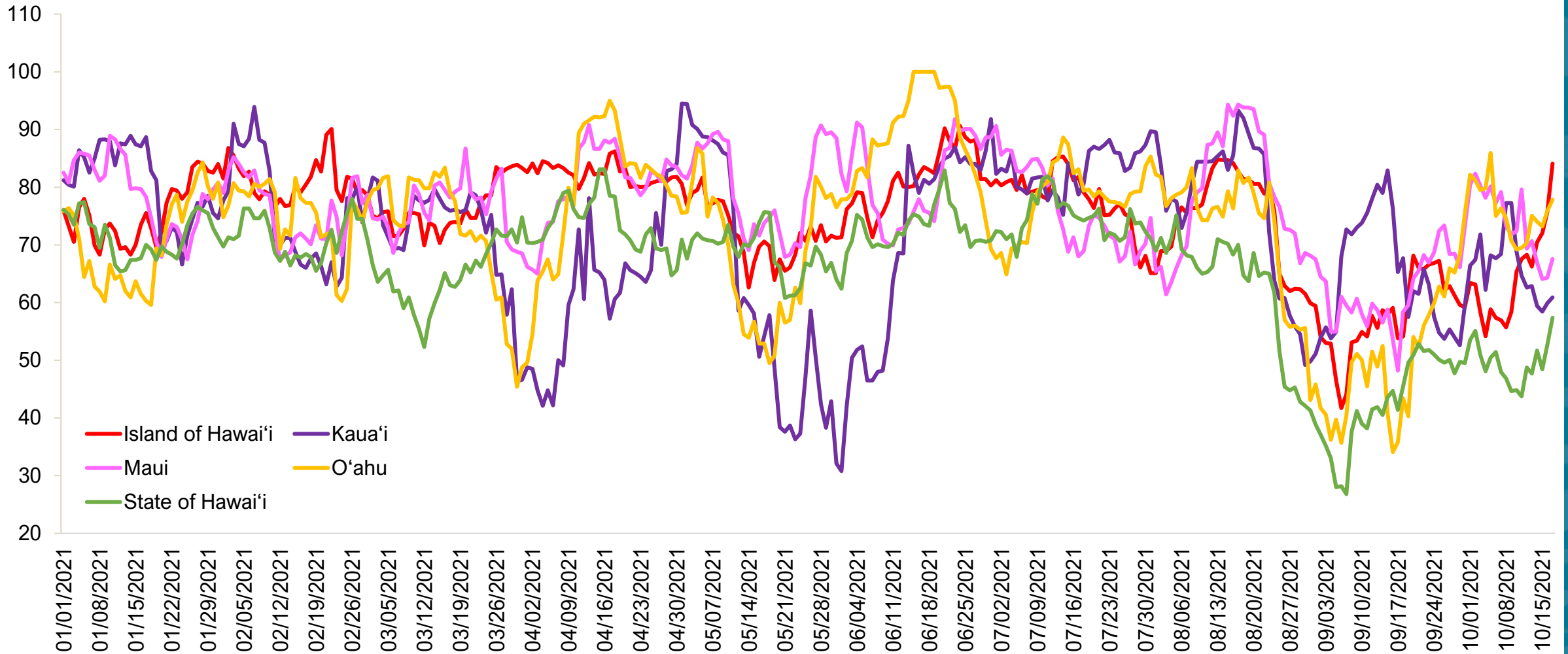
June 24, 2021 – Gov. Ige announces that individuals vaccinated in the U.S. will be able to bypass the testing/quarantine requirement with proof of vaccination through the state's Safe Travels program

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

Legend:
- Island of Hawai'i (red)
- Kaua'i (purple)
- Maui (magenta)
- O'ahu (yellow/gold)
- State of Hawai'i (green)

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?
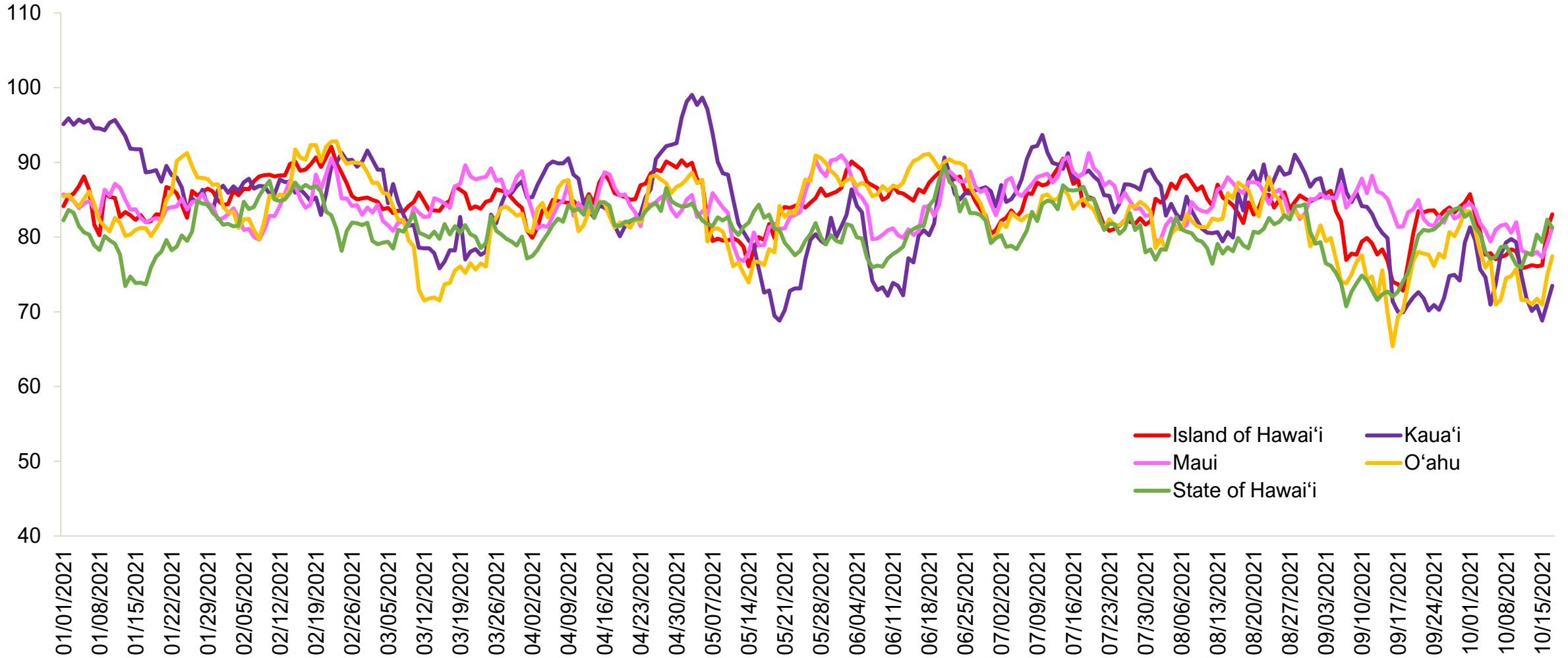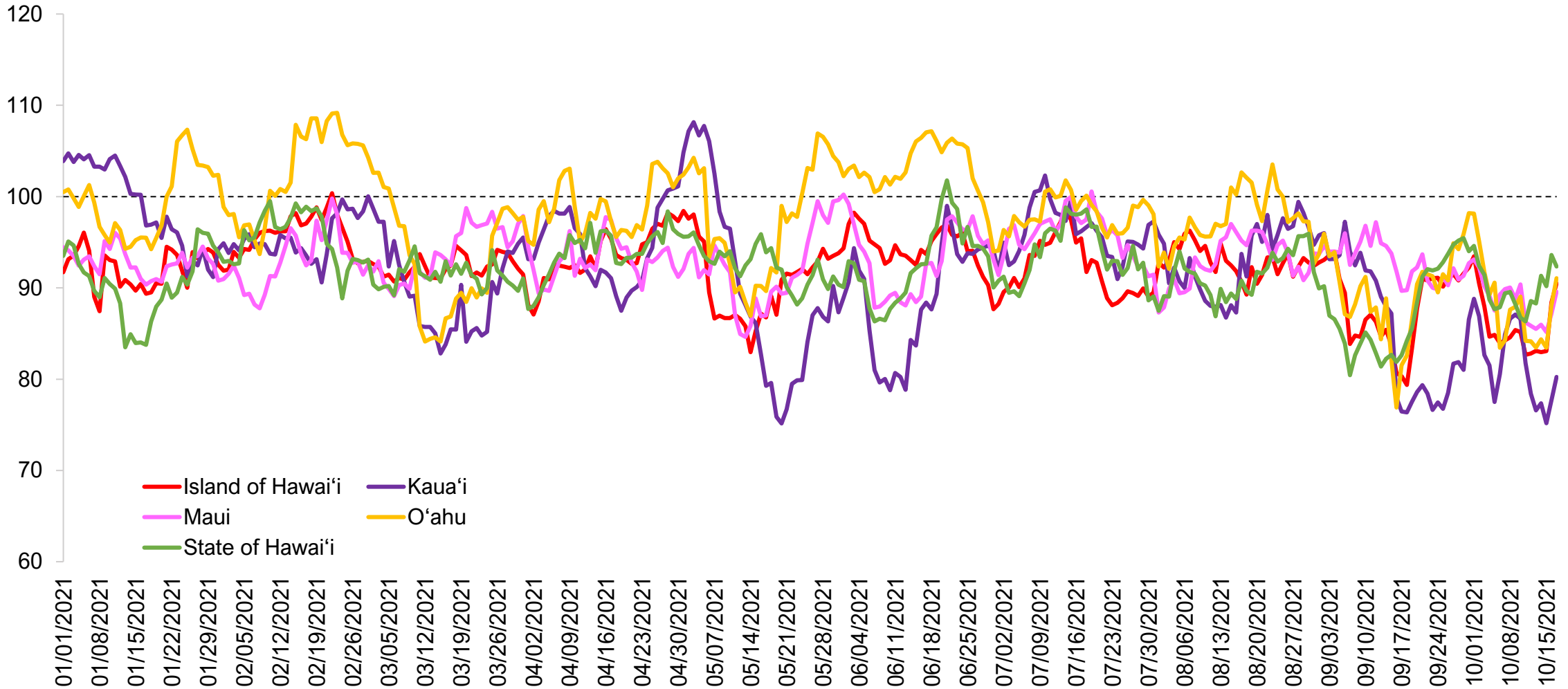
Source: YouGov data as of October 18, 2021

Index of U.S. Buzz Net Score Two-Week Moving Average
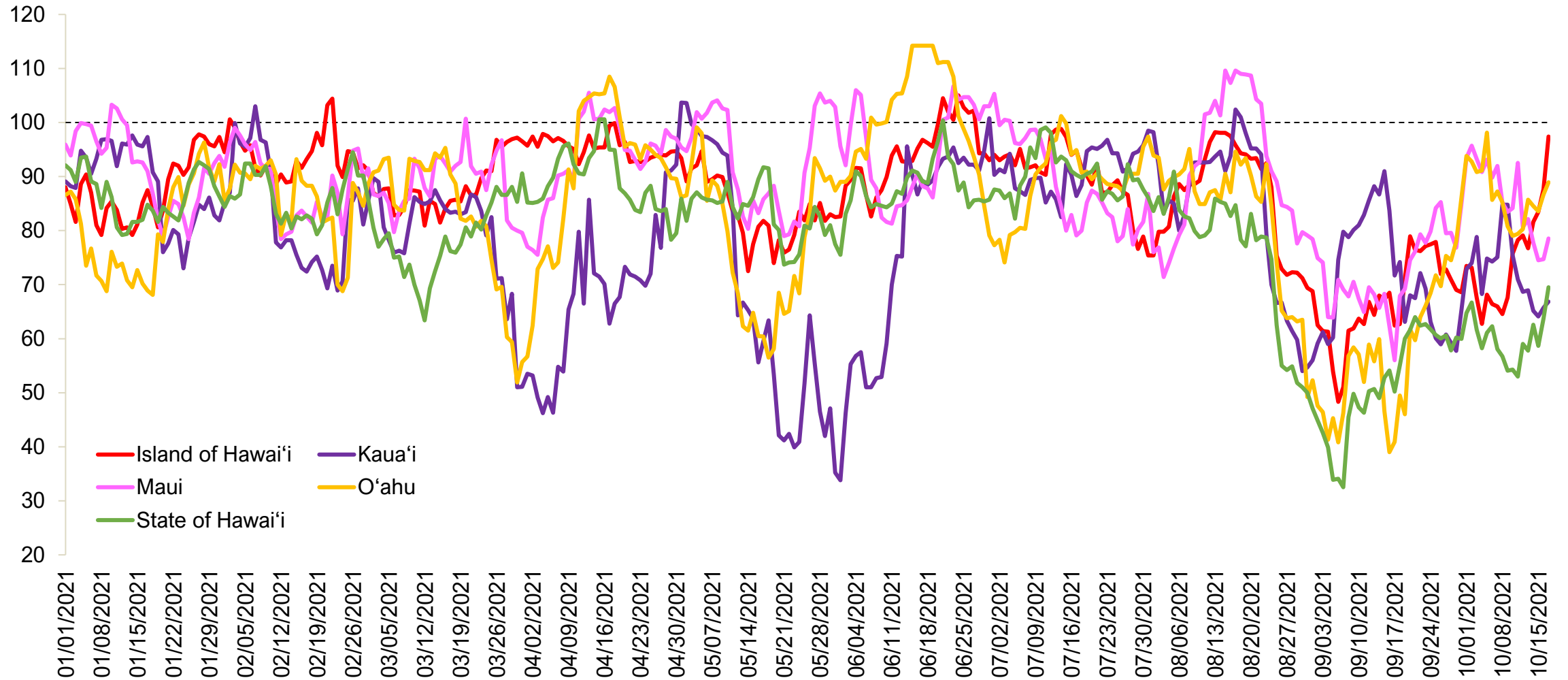
Question: (Net) Over the PAST TWO WEEKS, which of the following destinations have you heard something POSITIVE about (whether in the news, through advertising, or talking to friends and family)? / Now which of the following have you heard something NEGATIVE about over the PAST TWO WEEKS?

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?
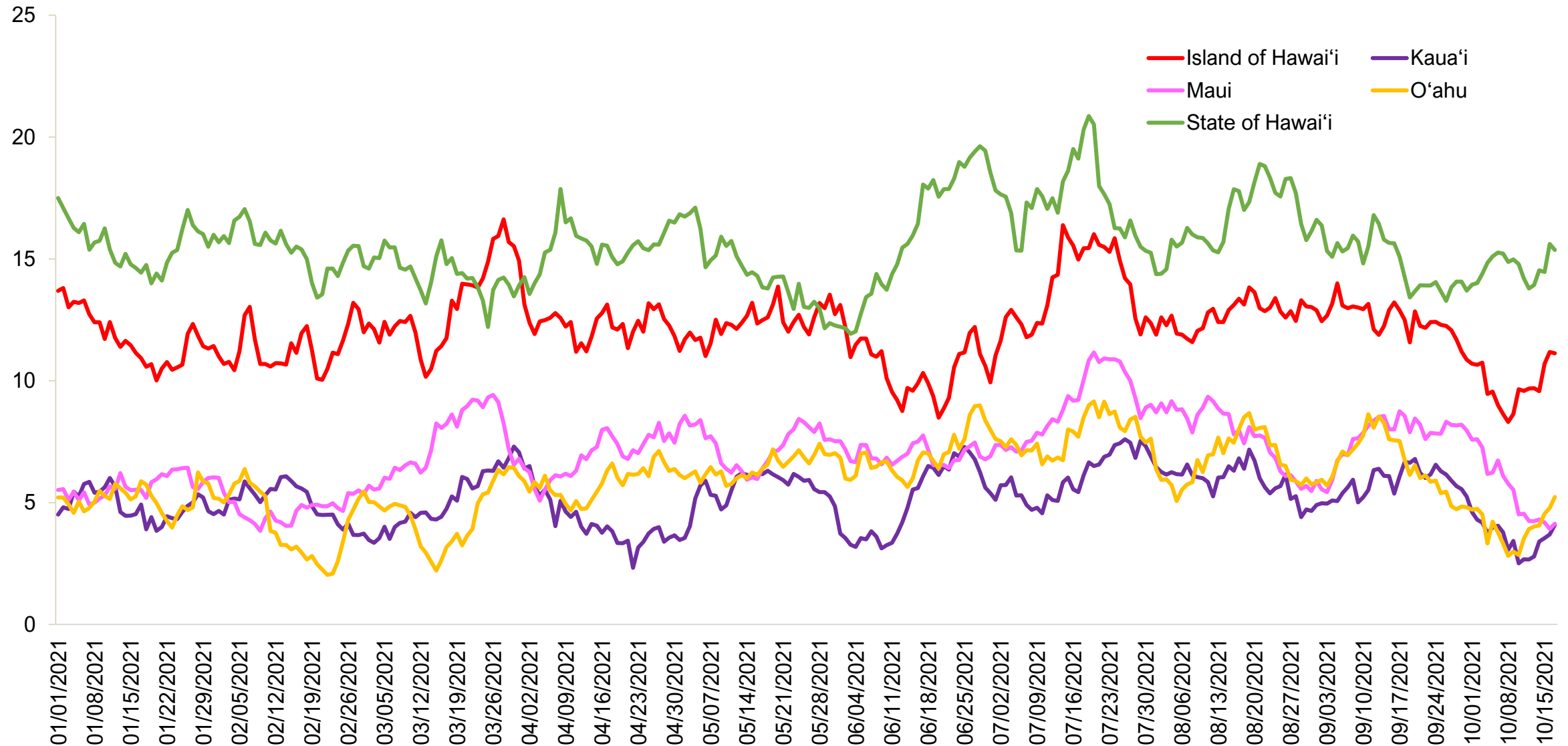
October 20, 2021

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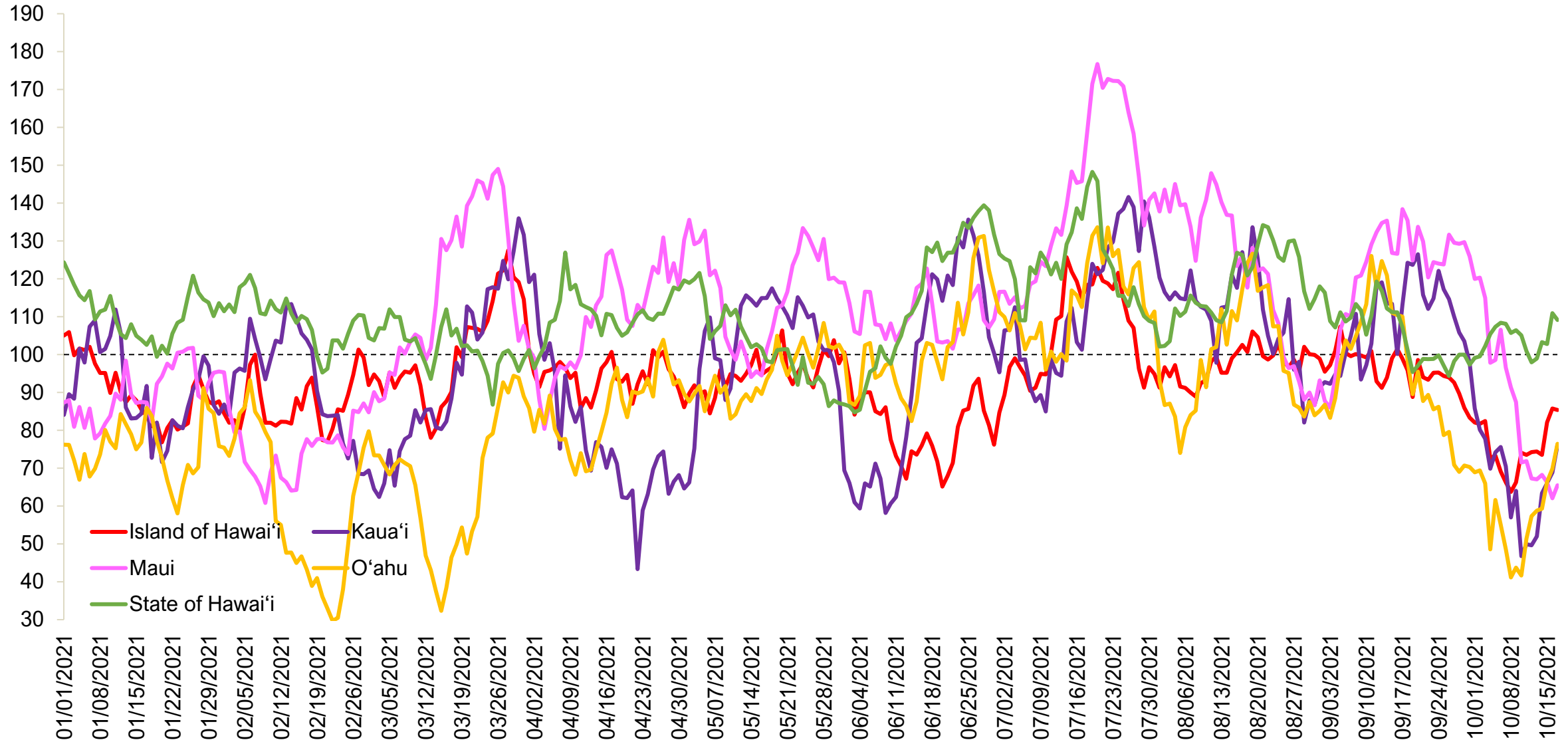
U.S. Word of Mouth Exposure (% Yes) Two-Week Moving Average

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?)
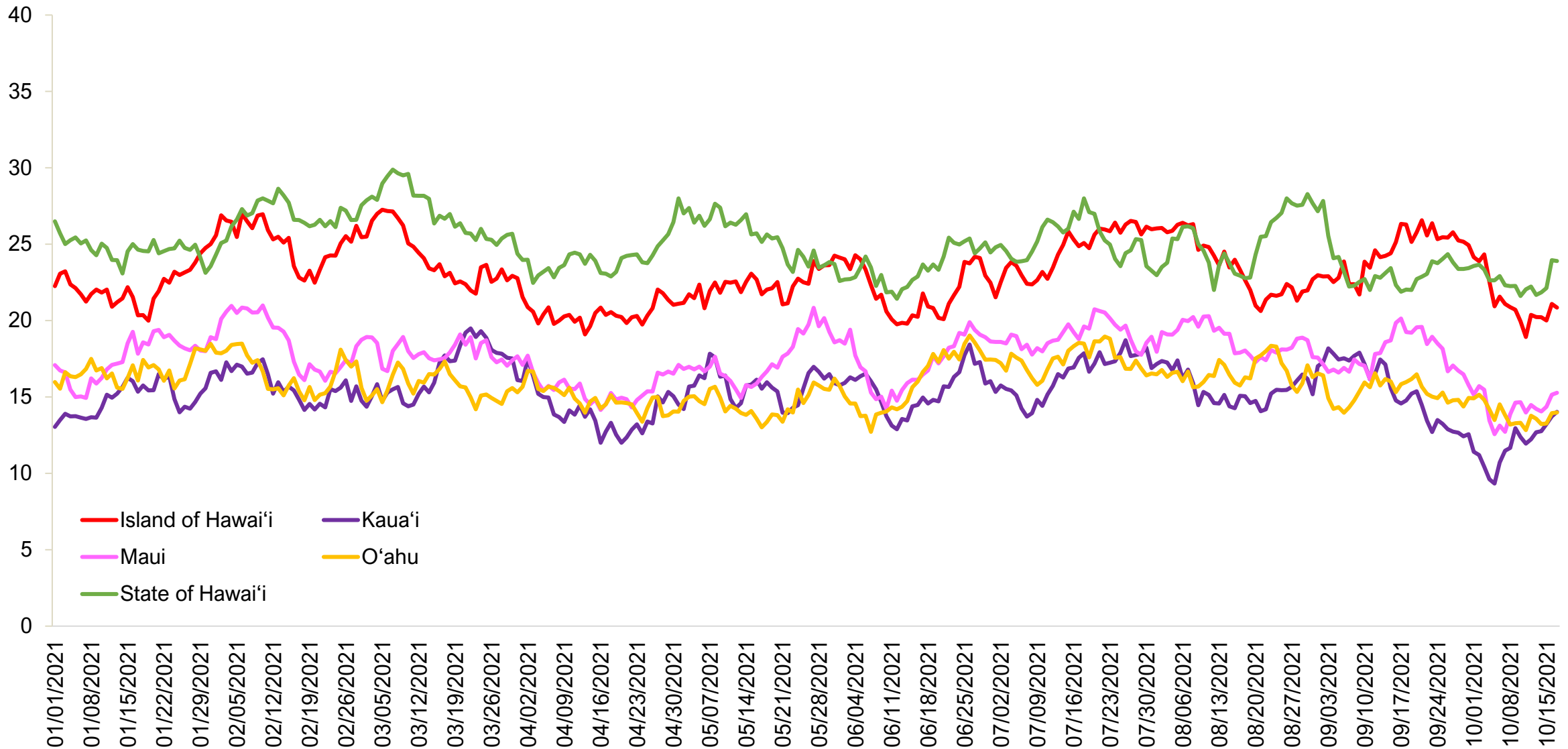
October 20, 2021

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

Legend:
- Island of Hawai'i
- Kaua'i
- Maui
- O'ahu
- State of Hawai'i

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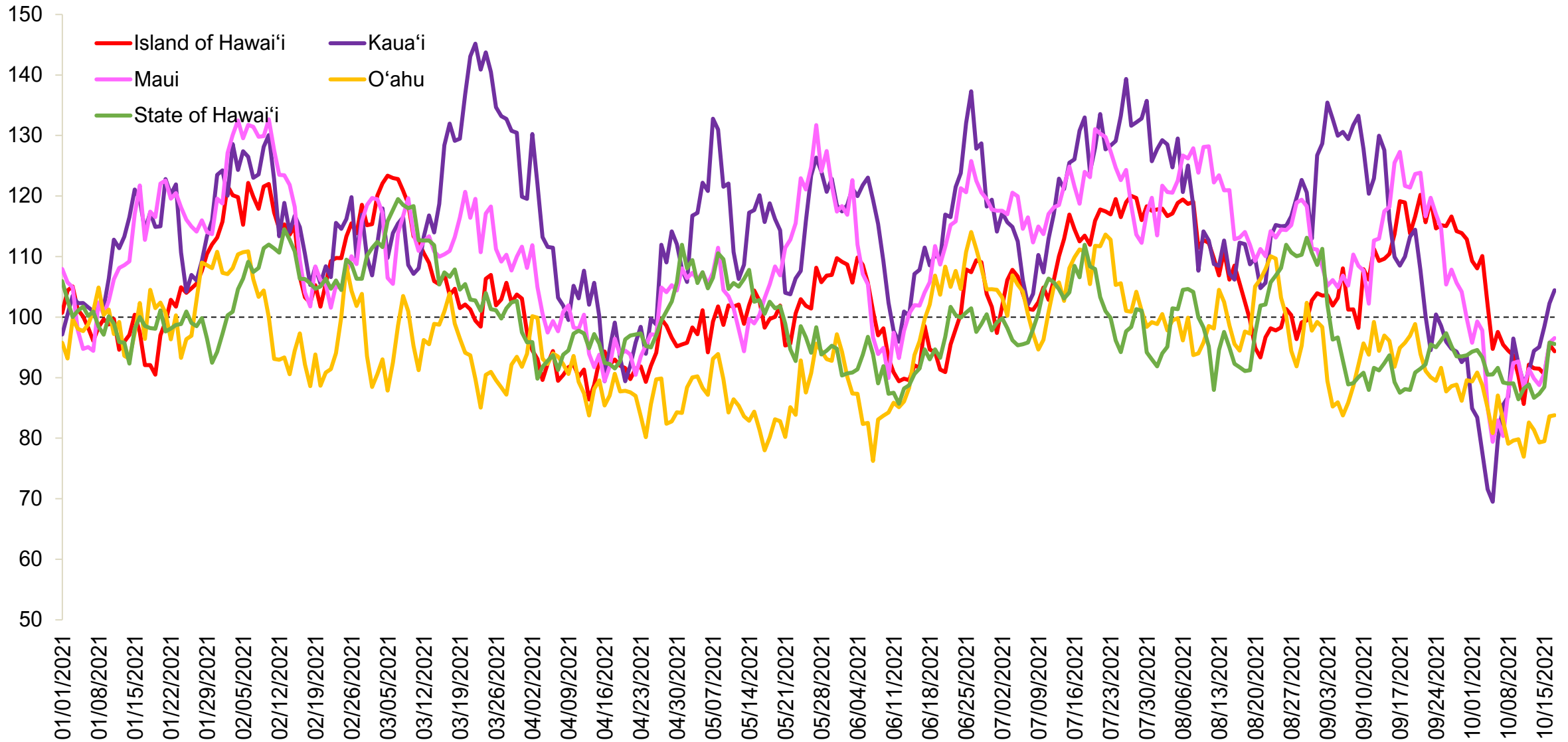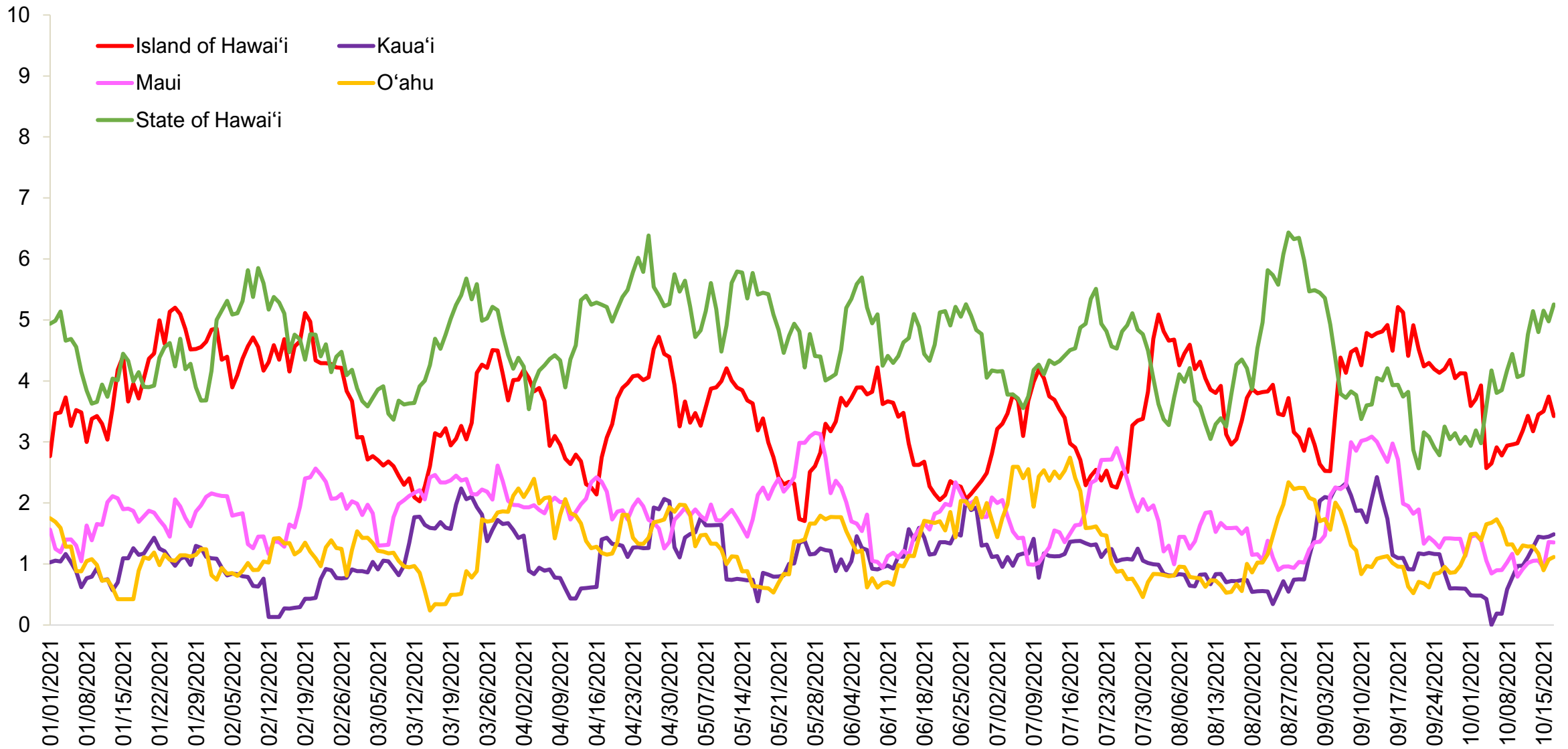
U.S. Consideration (% Yes) Two-Week Moving Average

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?

October 20, 2021

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

Legend:
- Island of Hawai'i (red)
- Kaua'i (purple)
- Maui (magenta)
- O'ahu (yellow)
- State of Hawai'i (green)

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?

October 20, 2021

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

Legend: Island of Hawaiʻi, Kauaʻi, Maui, Oʻahu, State of Hawaiʻi

Question: (Net) Of the destinations considered, which are you most likely to visit?
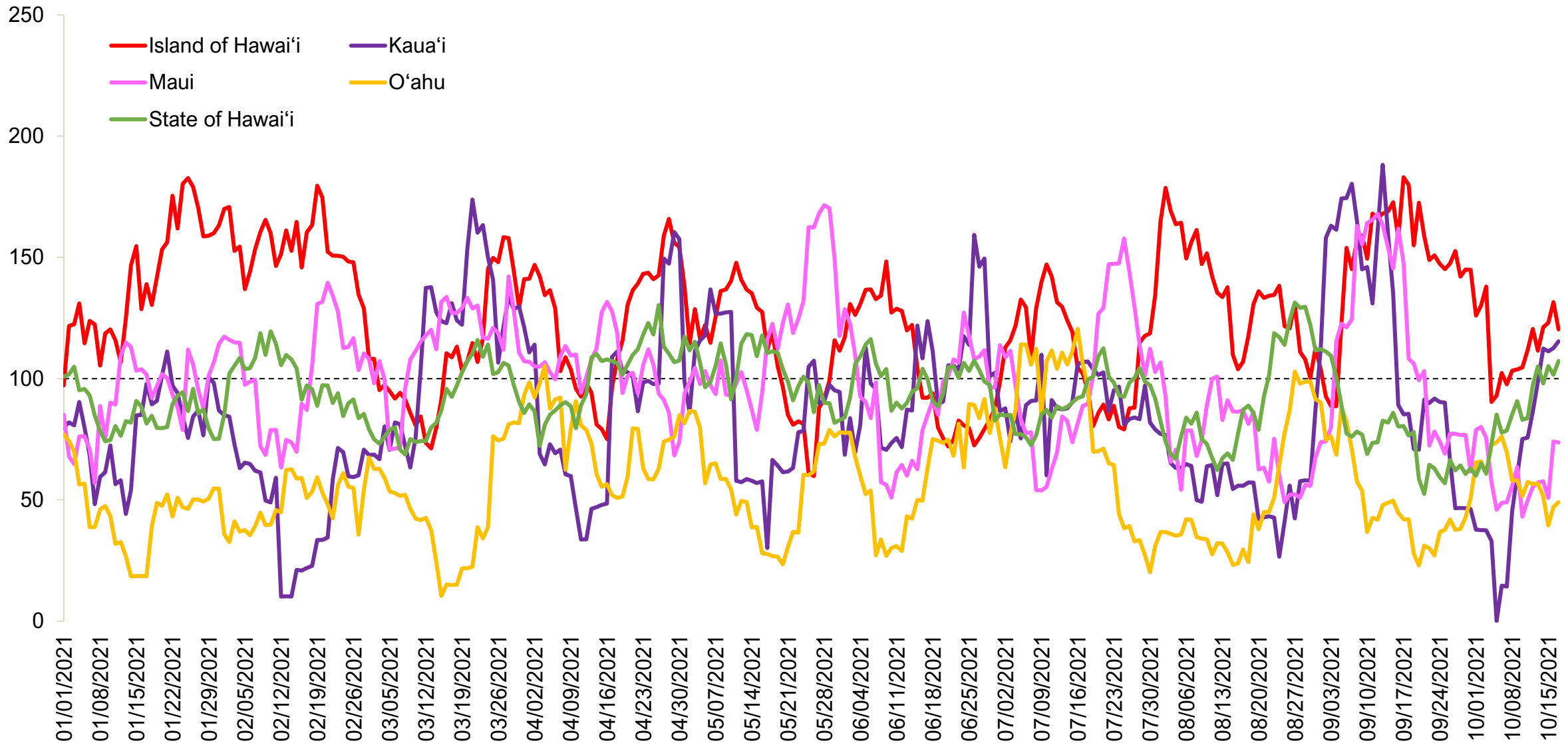
Source: YouGov data as of October 18, 2021

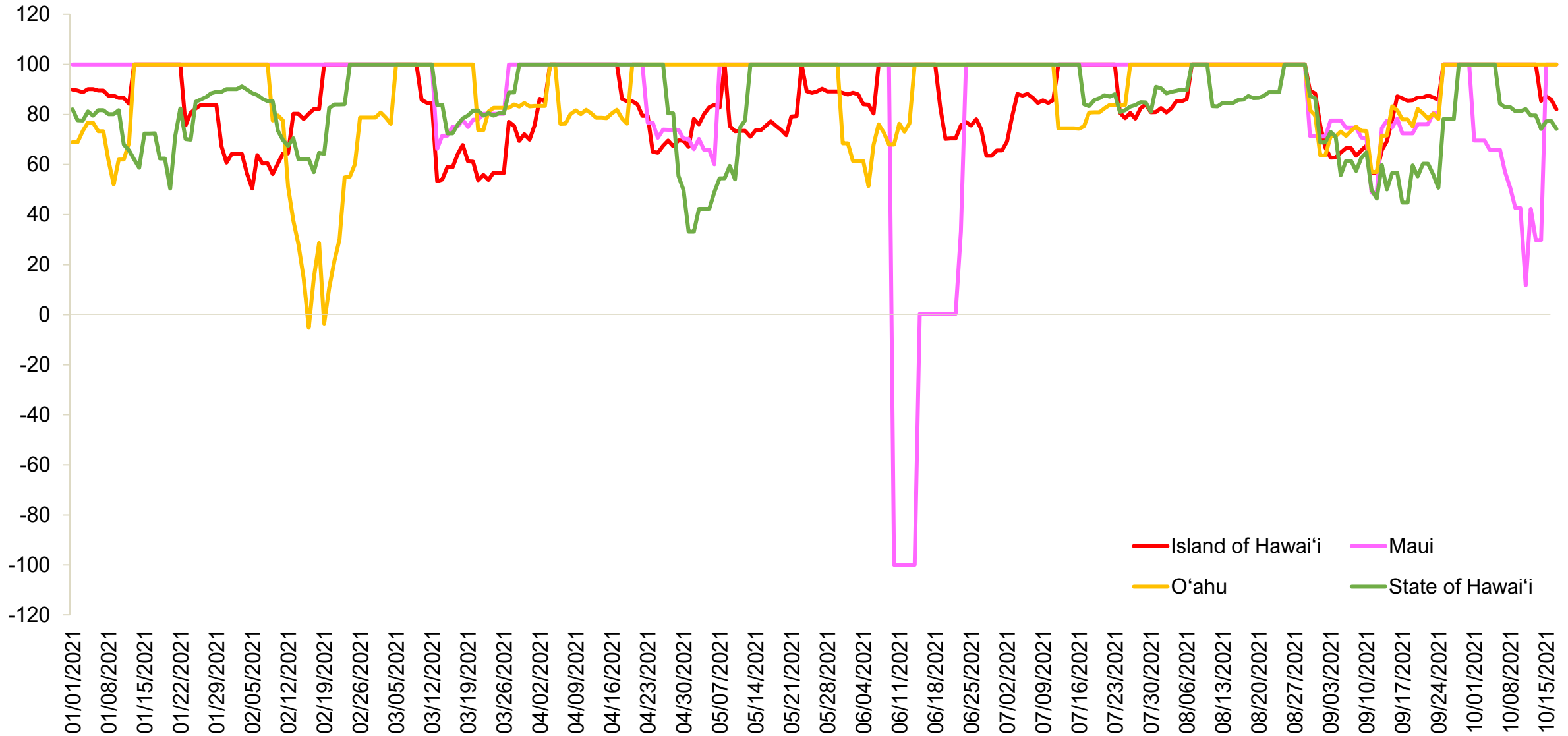# Index of U.S. Purchase Intent (% Yes) Two-Week Moving Average

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

October 20, 2021

Japan Destination Index Trends

Japan Buzz Net Score Two-Week Moving Average

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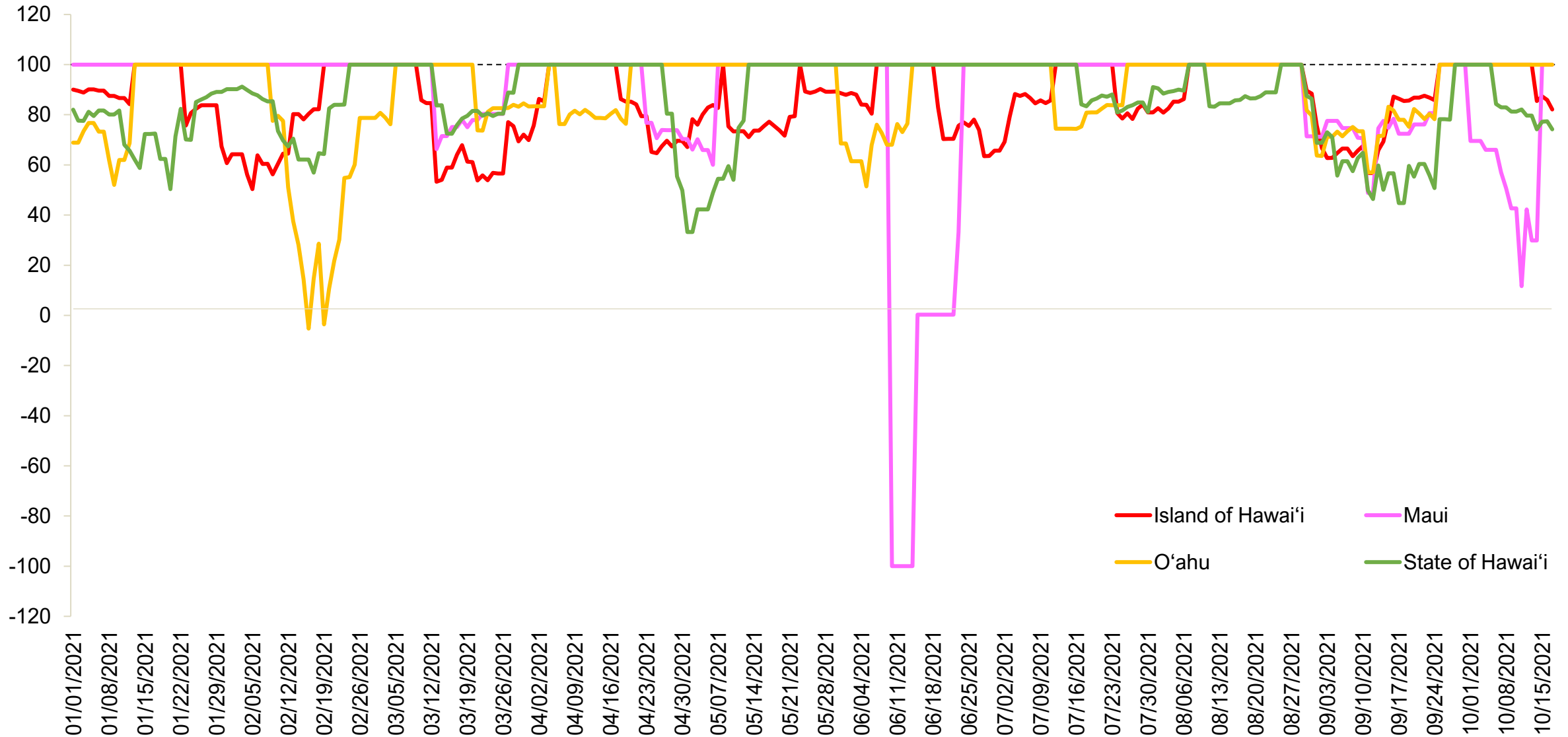
Question: (Net) Over the PAST TWO WEEKS, which of the following destinations have you heard something POSITIVE about (whether in the news, through advertising, or talking to friends and family)? / Now which of the following have you heard something NEGATIVE about over the PAST TWO WEEKS?

October 20, 2021   *Kauaʻi is not included due to low response volume

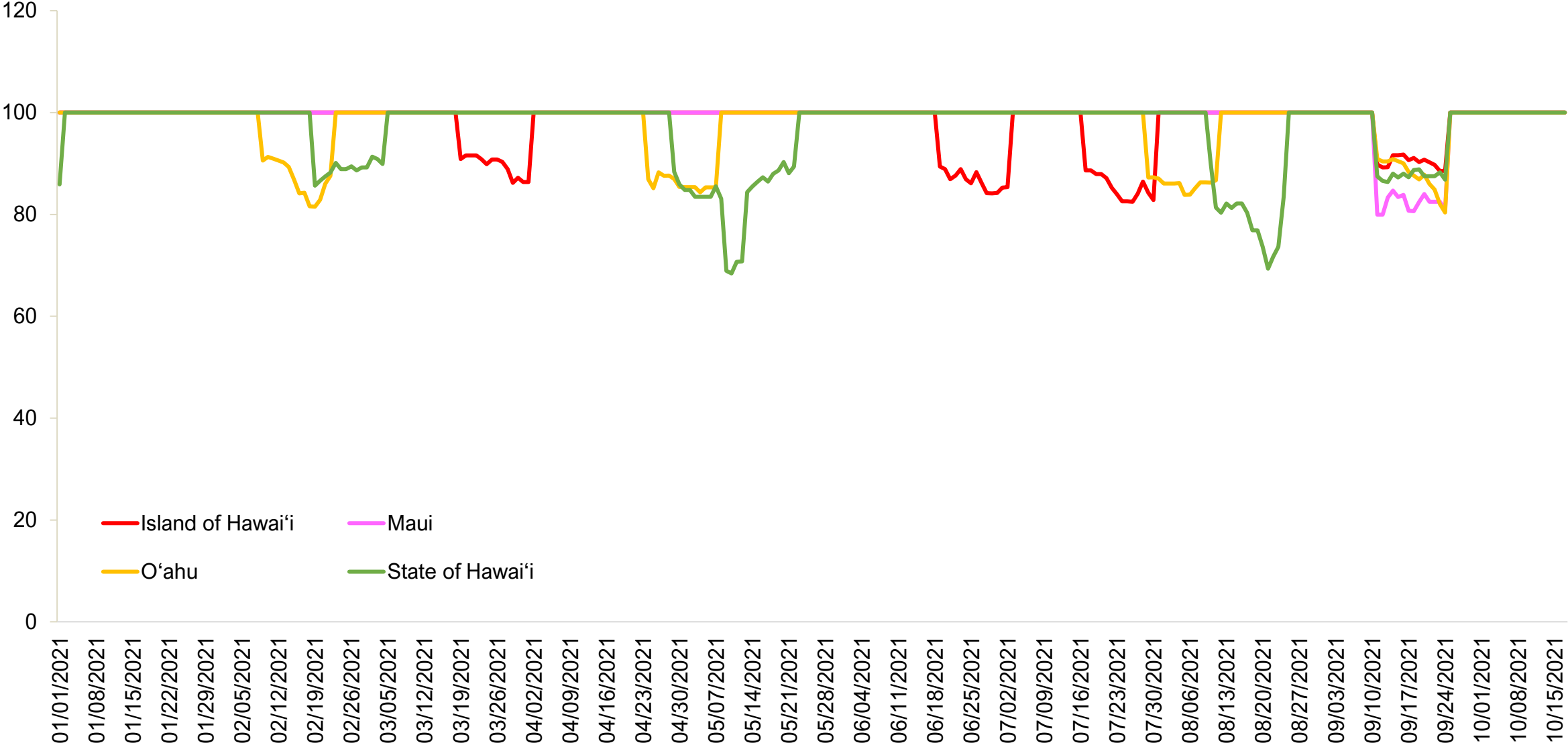Source: YouGov data as of October 18, 2021

Index of Japan 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?

19   October 20, 2021   *Kaua'i is not included due to low response volume

Japan Recommend Net Score Two-Week Moving Average

Legend:
- Island of Hawai'i (red)
- Maui (magenta)
- O'ahu (yellow)
- State of Hawai'i (green)

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?

Kaua'i is not included due to low response volume

Source: YouGov data as of October 18, 2021

Index of Japan Recommend Net Score Two-Week Moving Average
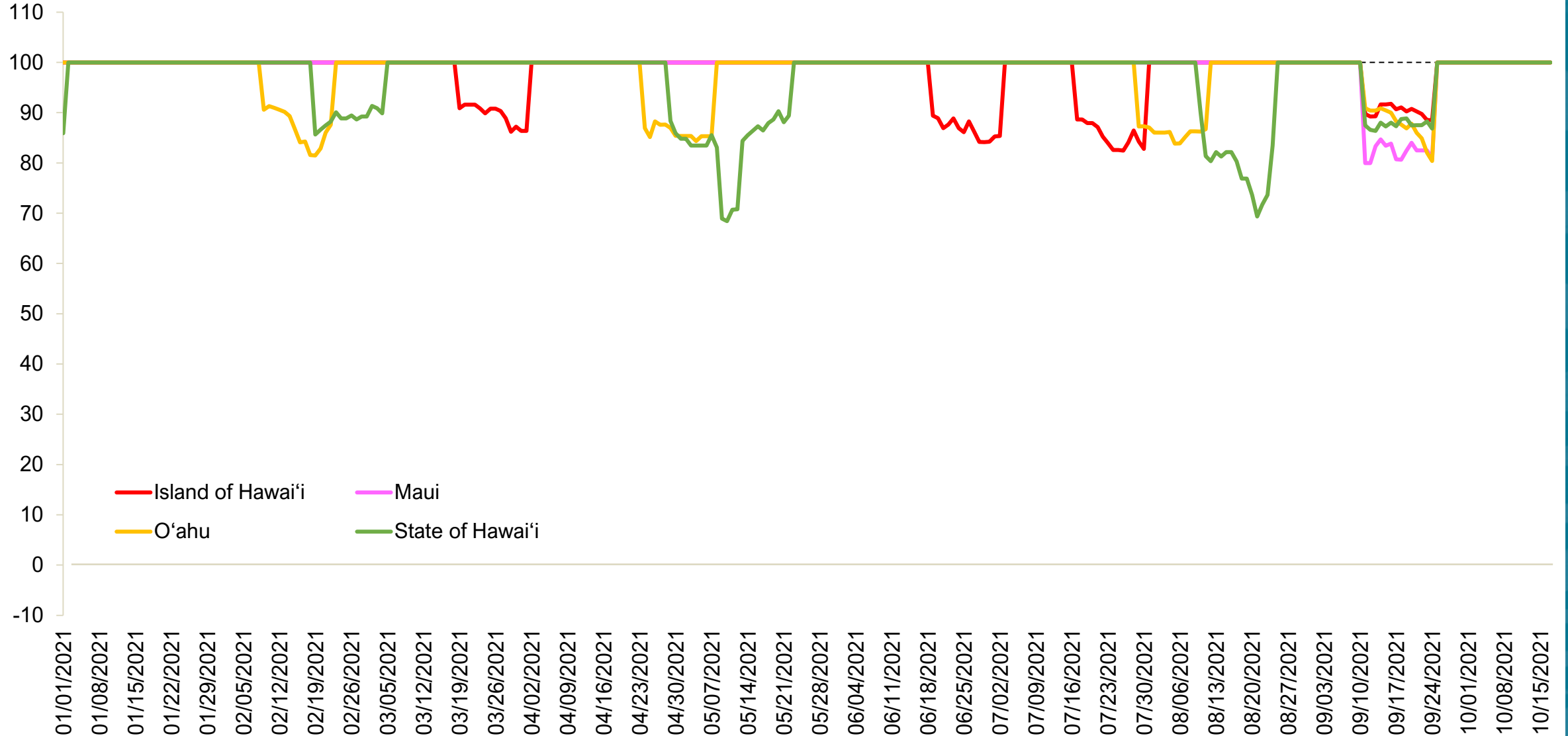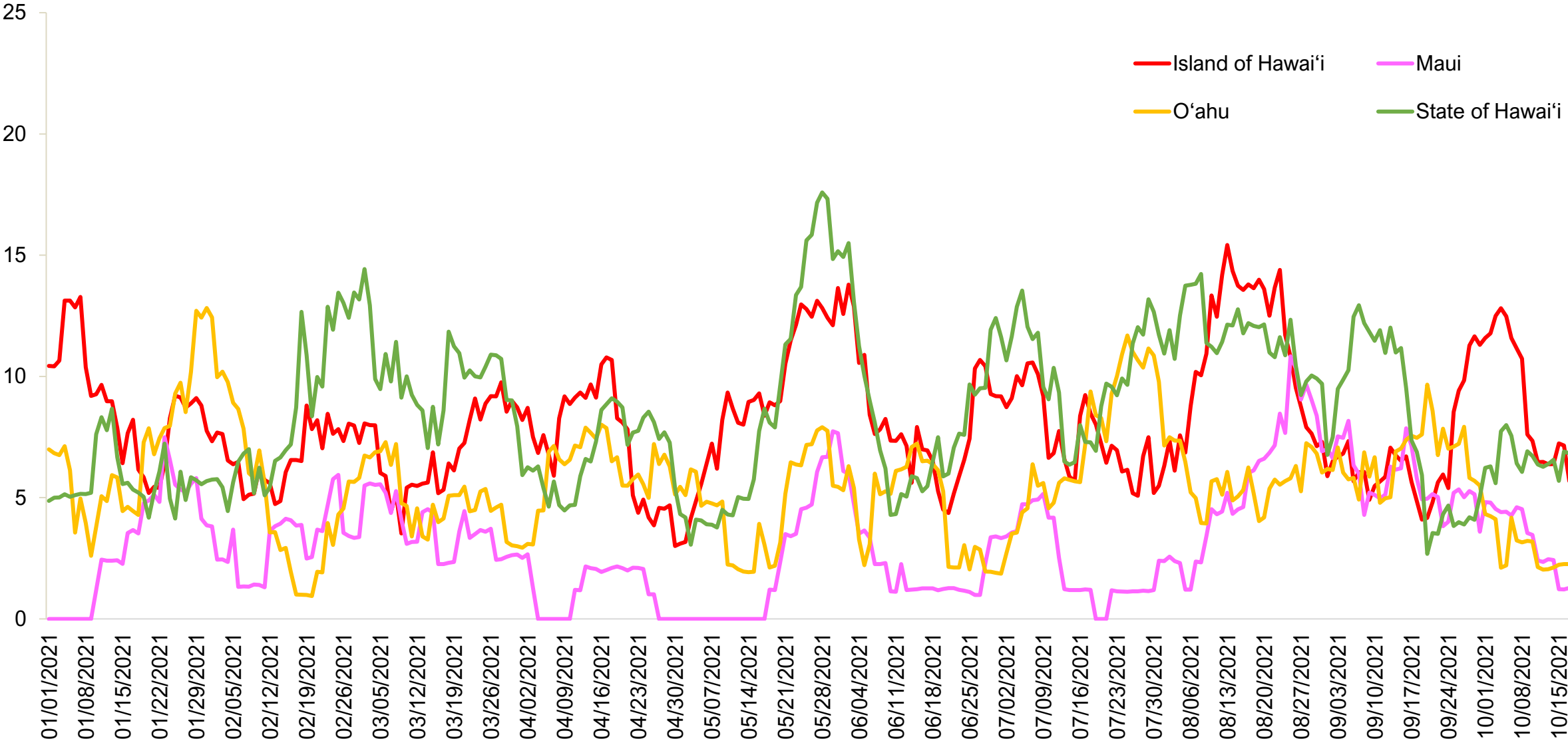

Question: (Net) Which of the following destinations would you RECOMMEND to a friend or colleague? / And which of the following destinations would you tell a friend or colleague to AVOID?

October 20, 2021   *Kaua'i is not included due to low response volume

Source: YouGov data as of October 18, 2021

Legend: Island of Hawai'i, Maui, O'ahu, State of Hawai'i

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

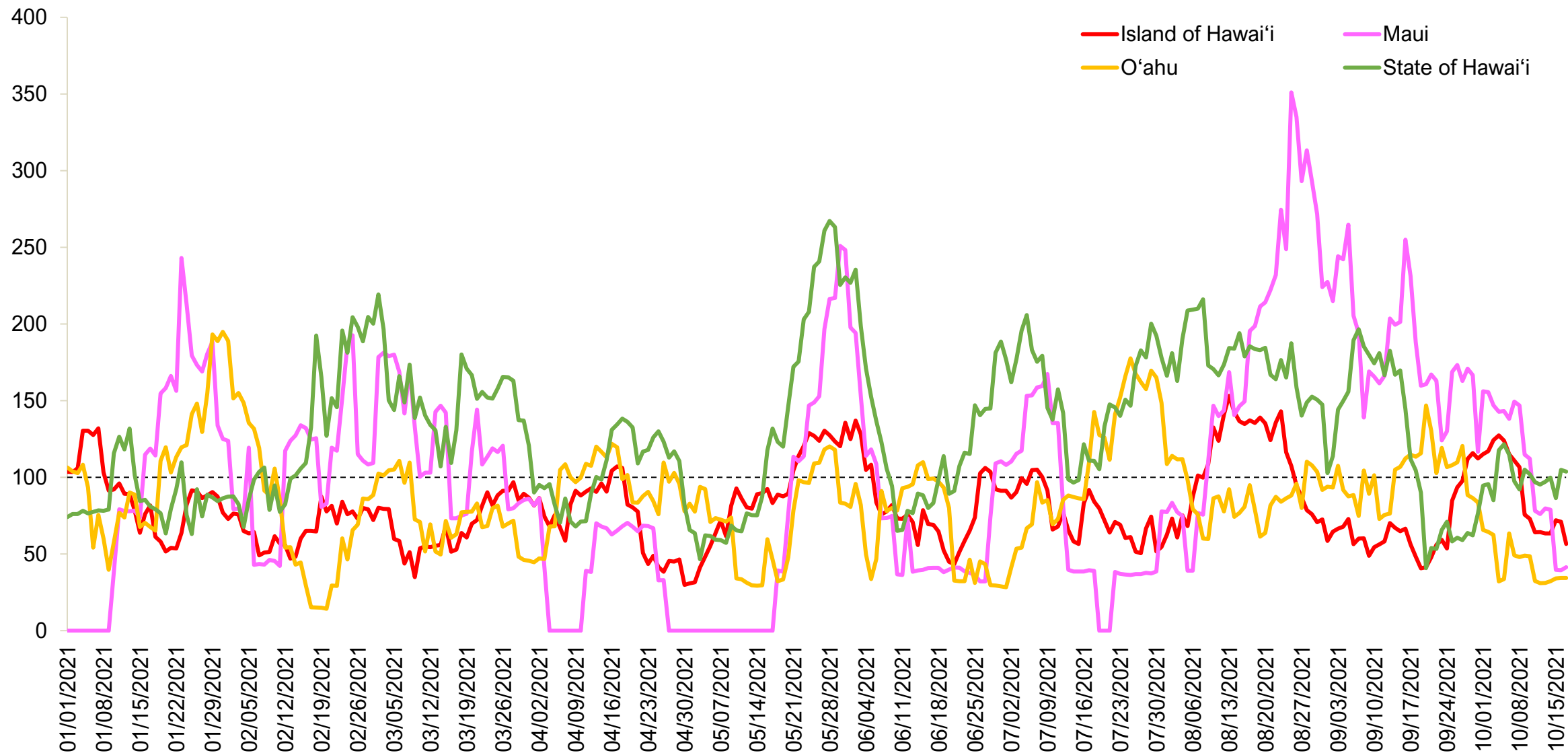Legend: Island of Hawai'i (red), Maui (magenta), O'ahu (orange/yellow), State of Hawai'i (green)

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?)

October 20, 2021   *Kaua'i is not included due to low response volume

Source: YouGov data as of October 18, 2021

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

Legend:
- Island of Hawai'i (red)
- O'ahu (orange)
- Maui (magenta)
- State of Hawai'i (green)

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?)
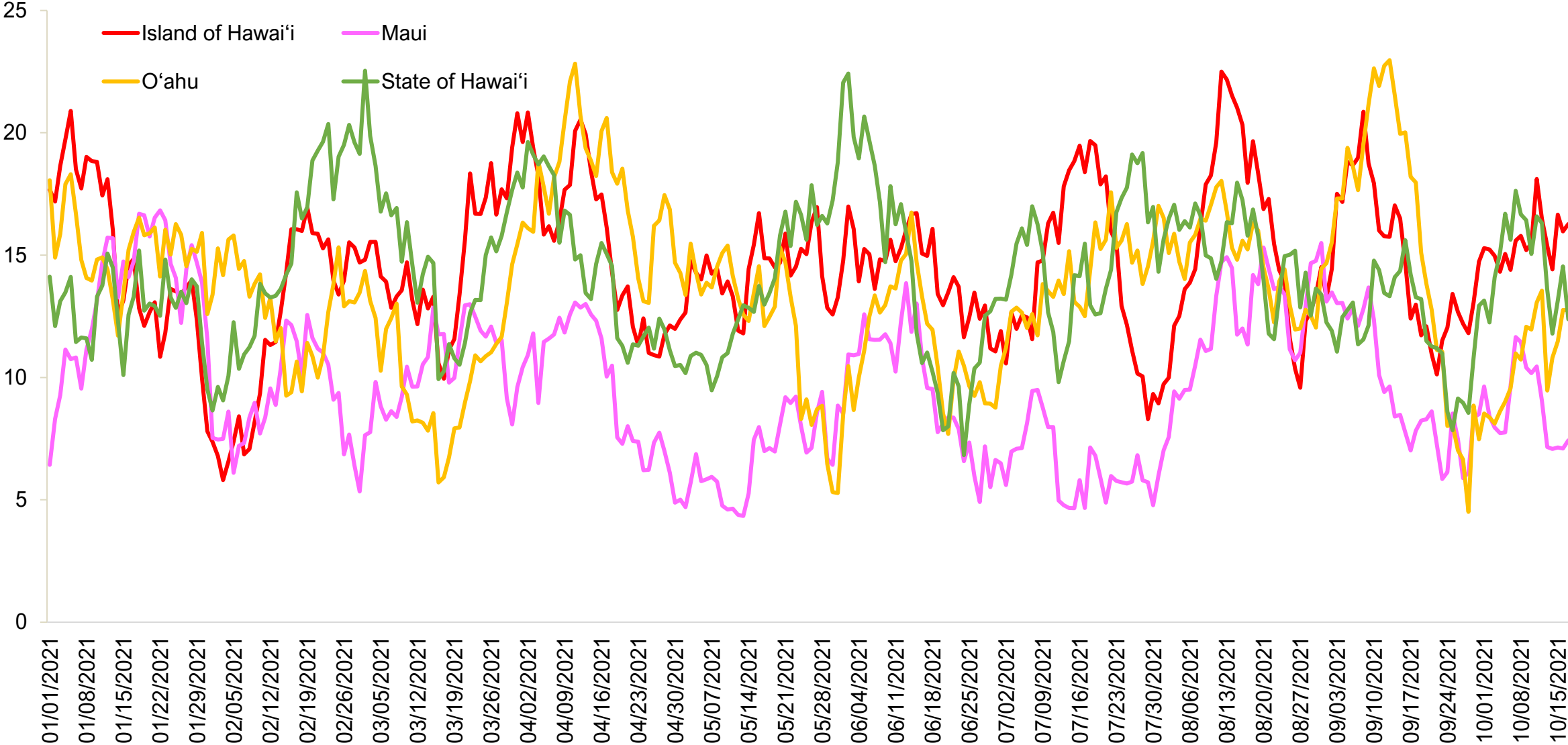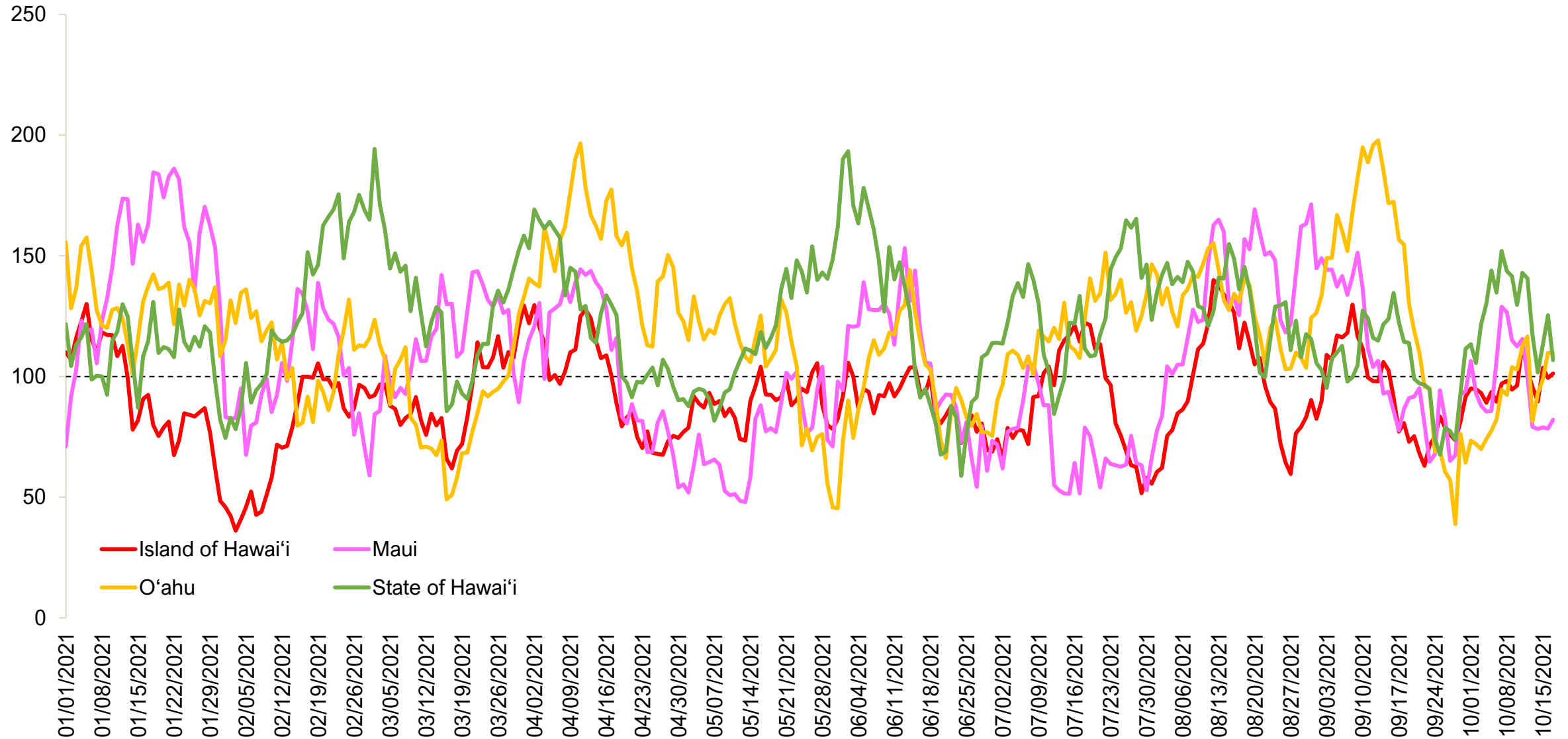
Kaua'i is not included due to low response volume

Japan Consideration (% Yes) Two-Week Moving Average

Legend: Island of Hawai'i, Maui, O'ahu, State of Hawai'i

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?)

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

Source: YouGov data as of October 18, 2021

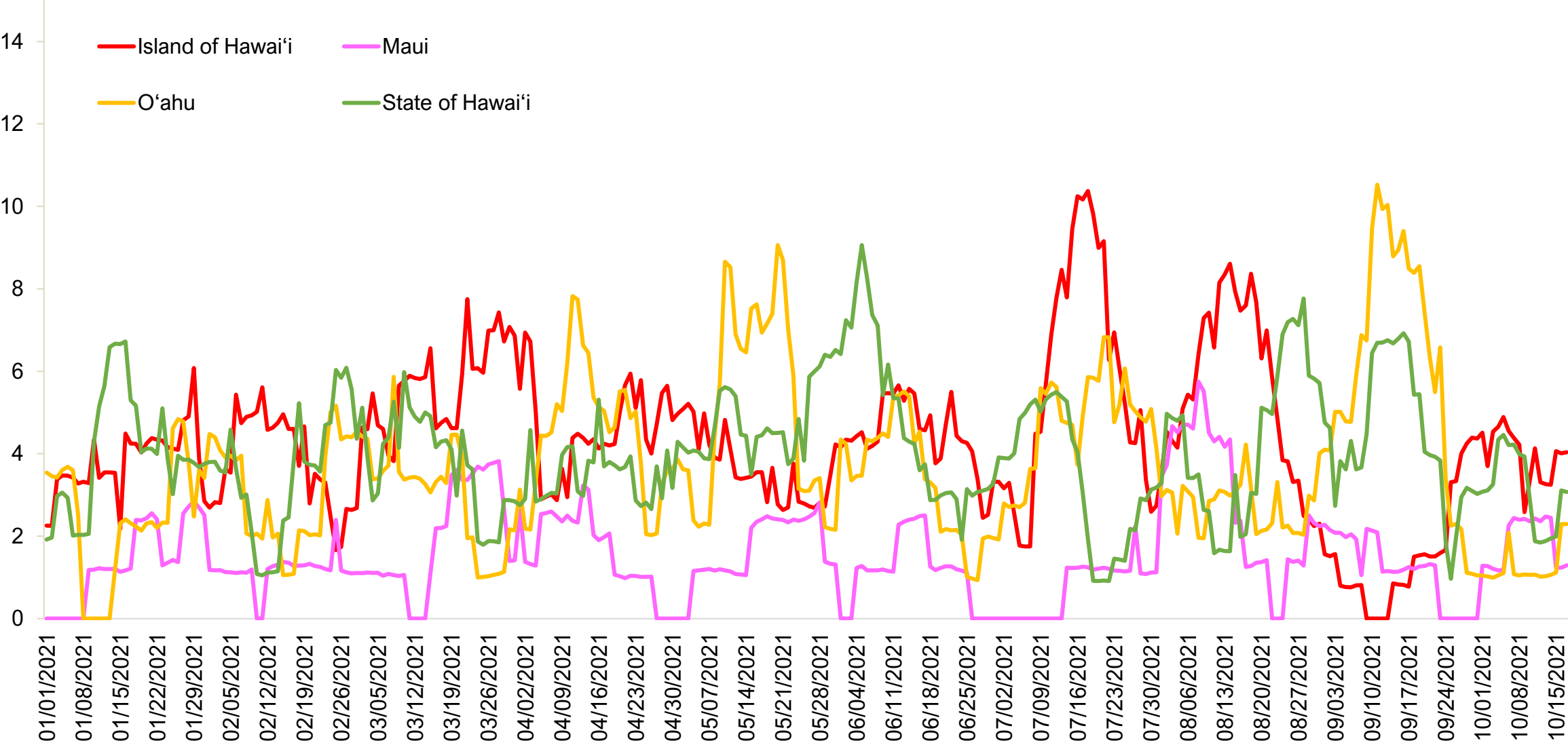# Index of Japan Consideration (% Yes) Two-Week Moving Average

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?

October 20, 2021   *Kaua'i is not included due to low response volume

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

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

October 20, 2021

Kaua'i is not included due to low response volume

Source: YouGov data as of October 18, 2021

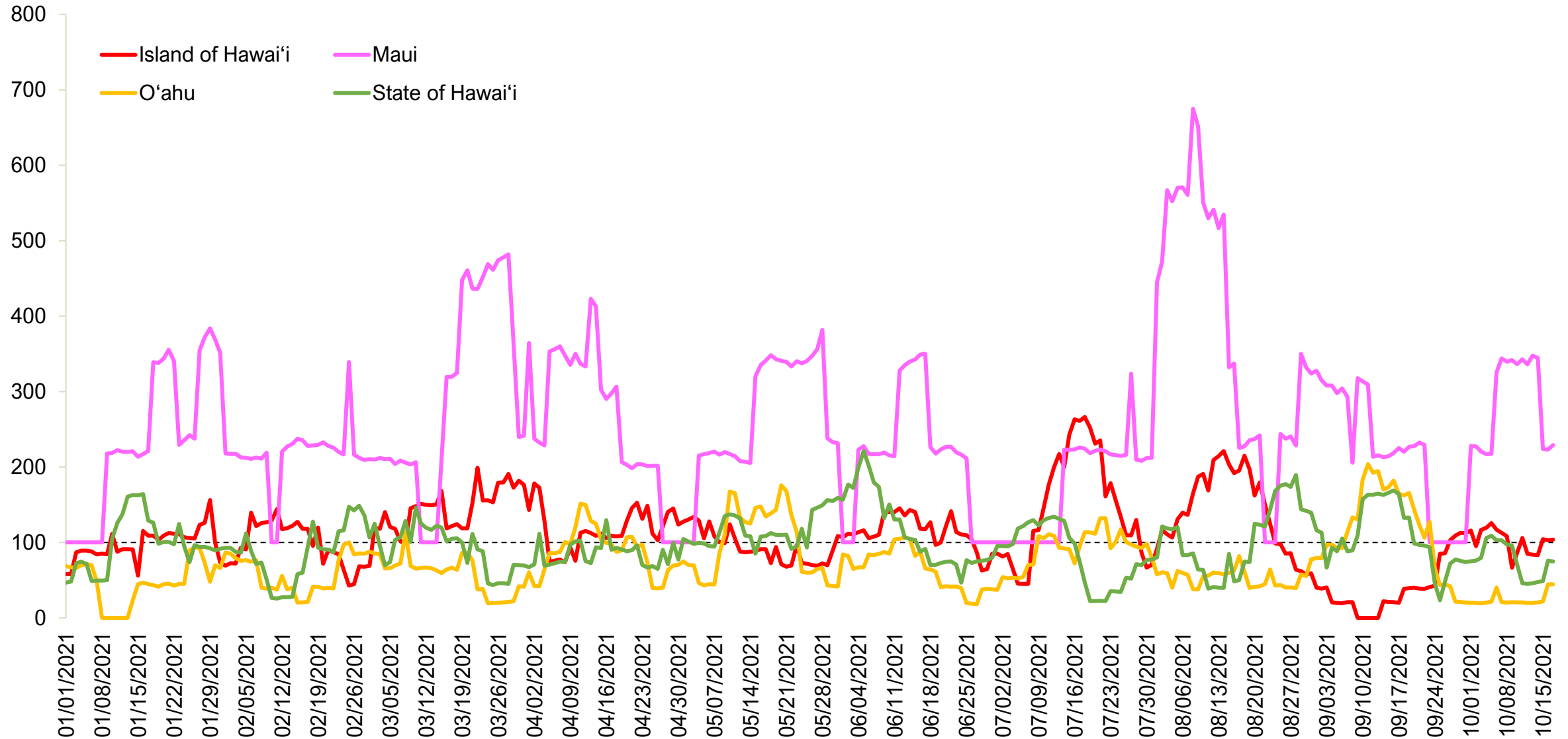# Index of Japan Purchase Intent (% Yes) Two-Week Moving Average

Legend:
- Island of Hawai'i
- Maui
- O'ahu
- State of Hawai'i

Question: (Net) Of the destinations considered, which are you most likely to visit?
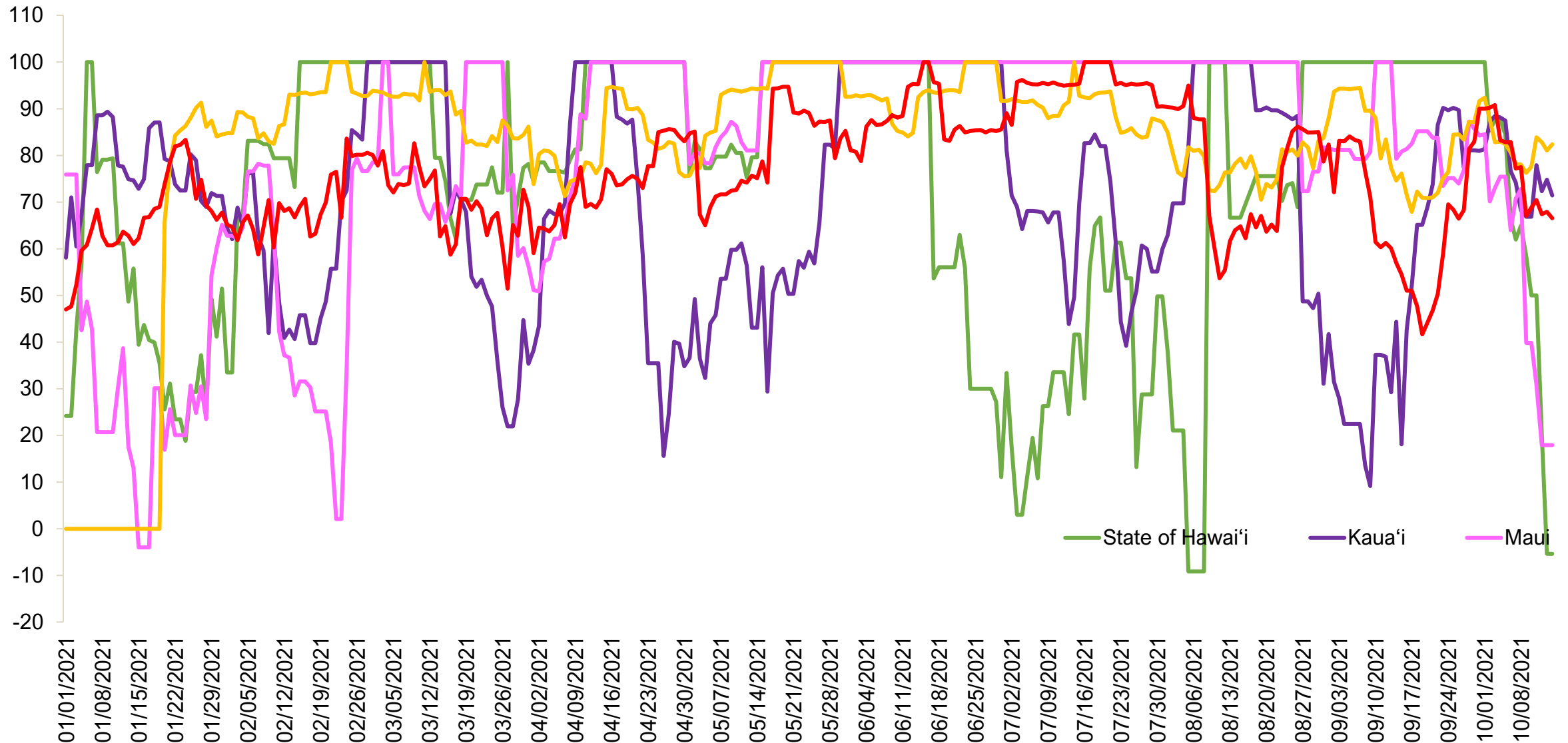
October 20, 2021

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

Source: YouGov data as of October 18, 2021

Canada Destination Index Trends

Canada Buzz Net Score Two-Week Moving Average

Legend: State of Hawaiʻi — Kauaʻi — Maui

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?

October 20, 2021   *Island of Hawaiʻi data not available until 1/20/2021

Source: YouGov data as of October 18, 2021

Canada Recommend Net Score Two-Week Moving Average
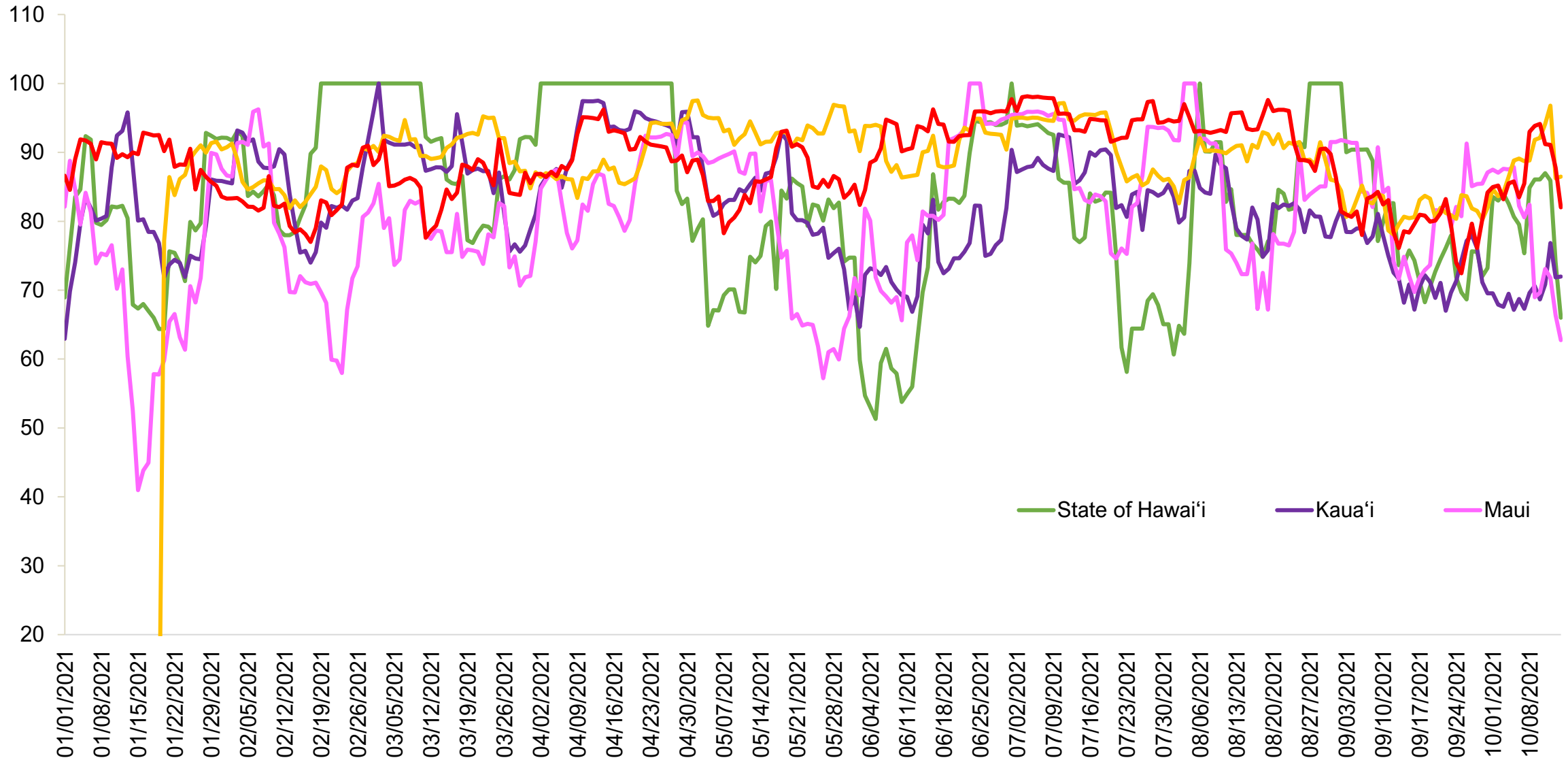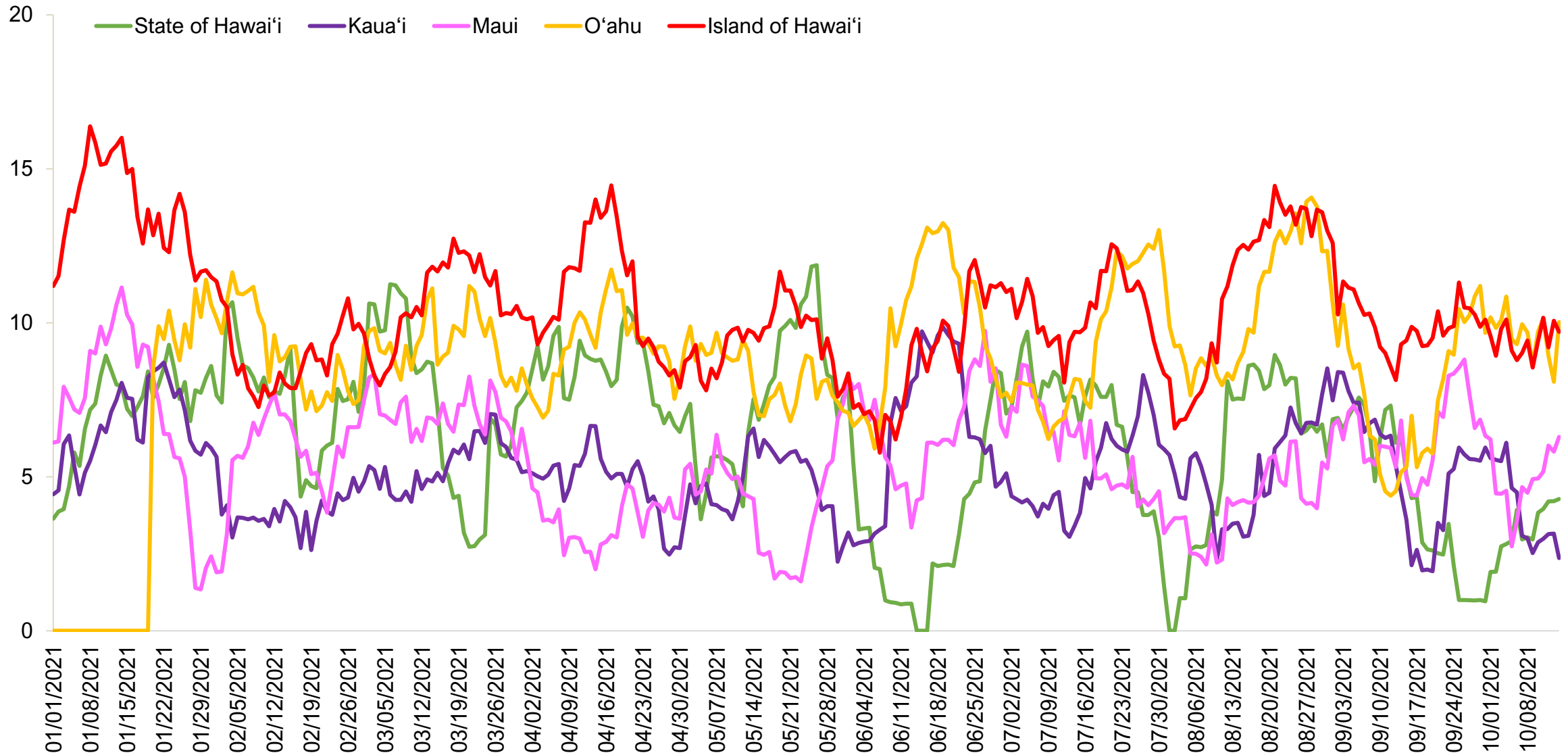

Legend: State of Hawai'i — Kaua'i — Maui

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?

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

Source: YouGov data as of October 18, 2021

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

Legend: State of Hawai'i, Kaua'i, Maui, O'ahu, Island of Hawai'i

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?)

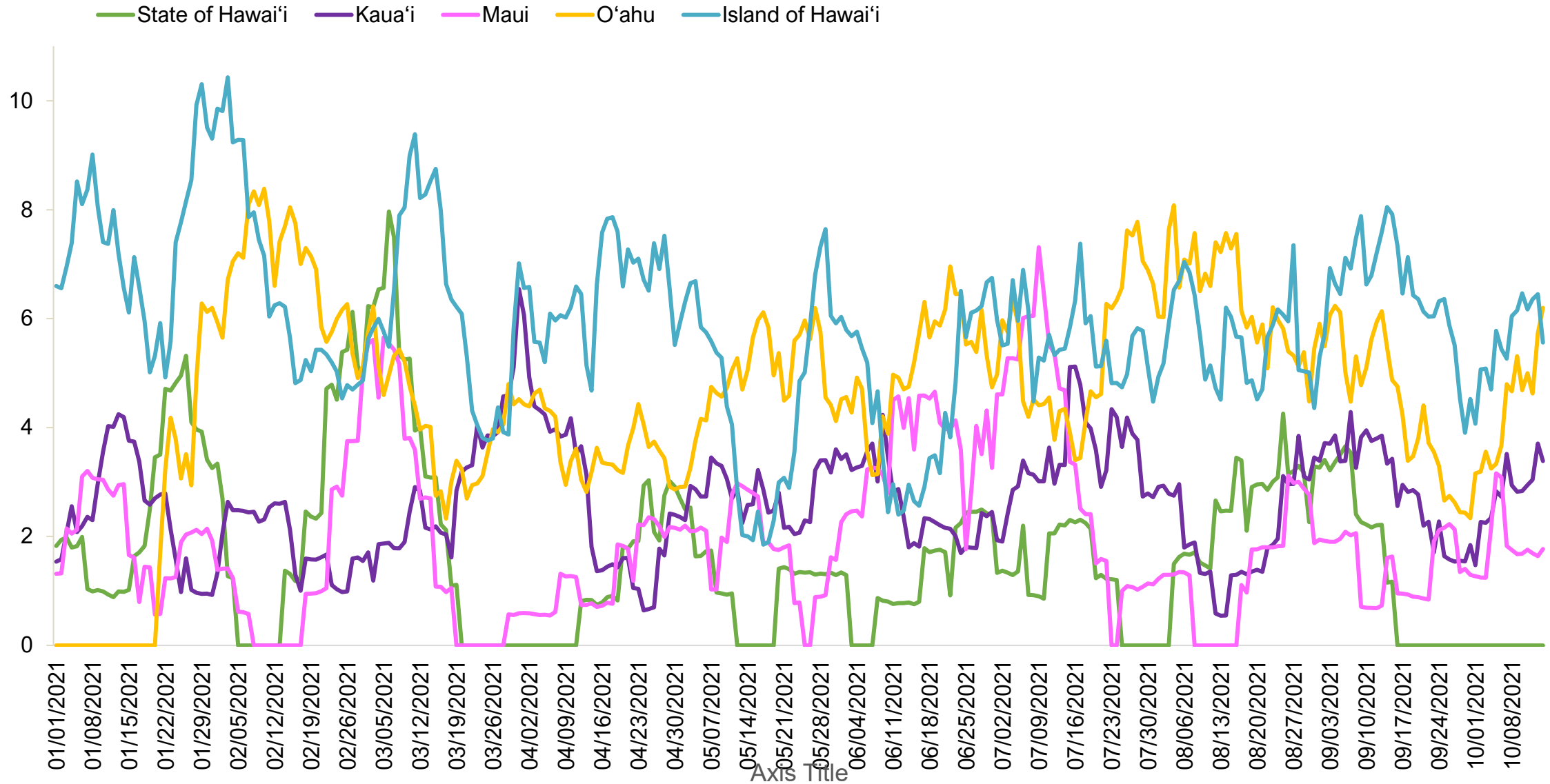*Island of Hawai'i data not available until 1/20/2021

Source: YouGov data as of October 18, 2021

Canada Consideration (% Yes) Two-Week Moving Average
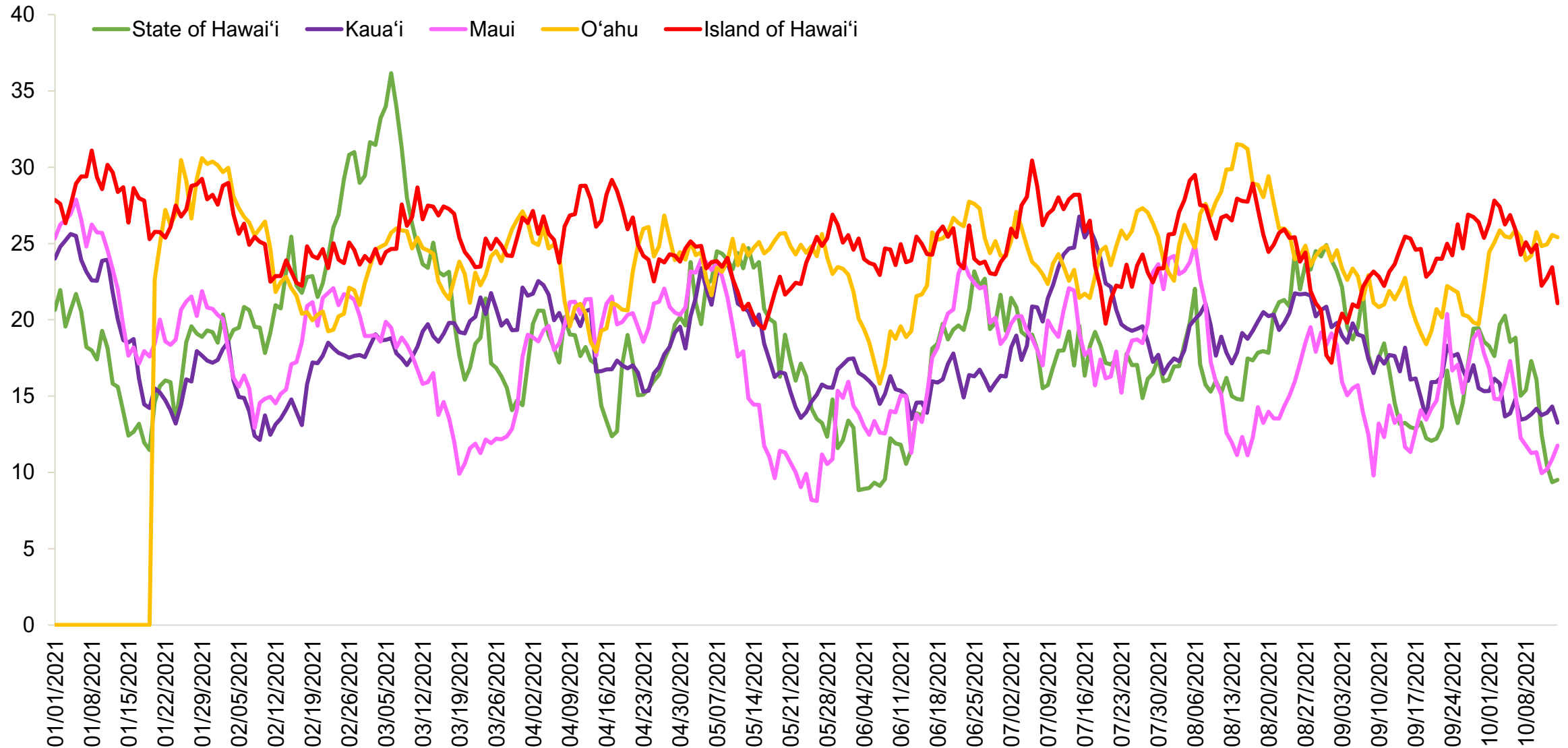
Legend: State of Hawai'i — Kaua'i — Maui — O'ahu — Island of Hawai'i

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?

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

Source: YouGov data as of October 18, 2021

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

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

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

Source: YouGov data as of October 18, 2021