YouGov Destination Index Trends

September 21, 2020
YouGov Syndicated Survey

- HTA subscribes to YouGov’s BrandIndex and Profiles databases for the U.S., Japan, and Australia
- 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

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

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

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

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

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

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

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

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

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

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

September 16, 2020 – pre-travel testing program launch pushed to Oct. 15th
U.S. Destination Index Trends
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 September 20, 2020
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

Source: YouGov data as of September 20, 2020

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 September 20, 2020
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?)

Source: YouGov data as of September 20, 2020
Index of 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?)

Source: YouGov data as of September 20, 2020
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?

Source: YouGov data as of September 20, 2020
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?

Source: YouGov data as of September 20, 2020
Japan Destination Index Trends
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?

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

Source: YouGov data as of September 20, 2020
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 is not included due to low response volume

Source: YouGov data as of September 20, 2020
Japan Recommend Net Score Two-Week Moving Average

Island of Hawai‘i
Maui
O‘ahu
State of Hawai‘i

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 September 20, 2020
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 September 20, 2020
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 September 20, 2020
Index of Japan Word of Mouth Exposure (% Yes) Two-Week Moving Average

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 September 20, 2020
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?

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

Source: YouGov data as of September 20, 2020
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?

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

Source: YouGov data as of September 20, 2020
Australia Destination Index Trends
Island of Hawai‘i
Maui
O‘ahu
State of Hawai‘i

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 is not included due to low response volume

Source: YouGov data as of September 20, 2020
Island of Hawaiʻi
Maui
Oʻahu
State of Hawaiʻi

*Kauaʻi is not included due to low response volume

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 September 20, 2020

September 21, 2020
Australia Recommend Net Score Two-Week Moving Average

Island of Hawai‘i
Maui
O‘ahu
State of Hawai‘i

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 September 20, 2020
Index of Australia 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?

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

Source: YouGov data as of September 20, 2020
Australia 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?)

Source: YouGov data as of September 20, 2020

*Kaua‘i is not included due to low response volume*
Index of Australia Word of Mouth Exposure (% Yes) Two-Week Moving Average

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 September 20, 2020
Australia Consideration (% Yes) Two-Week Moving Average

Island of Hawai'i
Maui
O'ahu
State 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?

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

Source: YouGov data as of September 20, 2020
Index of Australia Consideration (% Yes) Two-Week Moving Average

- 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 September 20, 2020