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

<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>March 26, 2020</td>
<td>Mandated 14-day quarantine for all travelers coming to Hawai’i goes into effect at 12:01 a.m.</td>
</tr>
<tr>
<td>June 24, 2020</td>
<td>Gov. Ige announces pre-travel testing program to avoid the mandatory quarantine starting Aug. 1&lt;sup&gt;st&lt;/sup&gt;</td>
</tr>
<tr>
<td>July 25-26, 2020</td>
<td>Hurricane Douglas passes close to the Hawaiian Islands</td>
</tr>
<tr>
<td>August 6, 2020</td>
<td>Announcement that interisland travel quarantine will be reinstated starting Aug. 11&lt;sup&gt;th&lt;/sup&gt;</td>
</tr>
<tr>
<td>June 16, 2020</td>
<td>14-day quarantine requirement for interisland travelers lifted</td>
</tr>
<tr>
<td>July 13, 2020</td>
<td>Pre-travel testing program launch pushed back to Sept. 1&lt;sup&gt;st&lt;/sup&gt;</td>
</tr>
<tr>
<td>July 27, 2020</td>
<td>Gov. Ige announces Hawai’i is being considered by Japan for resumption of international travel</td>
</tr>
<tr>
<td>September 16, 2020</td>
<td>Pre-travel testing program launch pushed to Oct. 15th</td>
</tr>
<tr>
<td>August 18, 2020</td>
<td>Pre-travel testing program launch pushed back to Oct. 1&lt;sup&gt;st&lt;/sup&gt;, at the earliest</td>
</tr>
</tbody>
</table>
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?
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?
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: YouGov data as of October 4, 2020
Index of U.S. Recommend Net Score Two-Week Moving Average

Source: HVCB analysis of YouGov data as of October 4, 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?)

Source: YouGov data as of October 4, 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 October 4, 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 October 4, 2020
Index of 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?

Source: YouGov data as of October 4, 2020
Japan 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?

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

Source: YouGov data as of October 4, 2020
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?

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

Source: YouGov data as of October 4, 2020
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?

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

Source: YouGov data as of October 4, 2020
Index of Japan Recommend Net Score Two-Week Moving Average

-10 -5 0 5 10 15 20 25 30 35 40 45 50 55 60 65 70 75 80 85 90 95 100 105 110

01/01/2020 01/05/2020 01/09/2020 01/13/2020 01/17/2020 01/21/2020 01/25/2020 01/29/2020 02/02/2020 02/06/2020 02/10/2020 02/14/2020 02/18/2020 02/22/2020 02/26/2020 03/01/2020 03/05/2020 03/09/2020 03/13/2020 03/17/2020 03/21/2020 03/25/2020 03/29/2020 04/02/2020 04/06/2020 04/10/2020 04/14/2020 04/18/2020 04/22/2020 04/26/2020 04/30/2020 05/04/2020 05/08/2020 05/12/2020 05/16/2020 05/20/2020 05/24/2020 05/28/2020 06/01/2020 06/05/2020 06/09/2020 06/13/2020 06/17/2020 06/21/2020 06/25/2020 06/29/2020 07/03/2020 07/07/2020 07/11/2020 07/15/2020 07/19/2020 07/23/2020 07/27/2020 07/31/2020 08/04/2020 08/08/2020 08/12/2020 08/16/2020 08/20/2020 08/24/2020 08/28/2020 09/01/2020 09/05/2020 09/09/2020 09/13/2020 09/17/2020 09/21/2020 09/25/2020 09/29/2020 10/03/2020

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 October 4, 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 October 4, 2020
Index of Japan 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?)

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

Source: YouGov data as of October 4, 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 October 4, 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 October 4, 2020
Australia Destination Index Trends
Australia 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 October 4, 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 October 4, 2020
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 October 4, 2020
*Kaua’i is not included due to low response volume*
Australia Word of Mouth Exposure (% Yes) Two-Week Moving Average

Source: YouGov data as of October 4, 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
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*
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 October 4, 2020
Index of Australia Consideration (% 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?)

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

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

Source: YouGov data as of October 4, 2020

31 October 2020