

# YouGov Destination Index Trends

November 02, 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 24, 2020–**  
Gov. Ige announces pre-travel testing program to avoid the mandatory quarantine starting Aug. 1<sup>st</sup>

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

**August 6, 2020**  
–  
announcement that interisland travel quarantine will be reinstated starting Aug. 11<sup>th</sup>

**September 16, 2020–**  
pre-travel testing program launch pushed to Oct. 15<sup>th</sup>

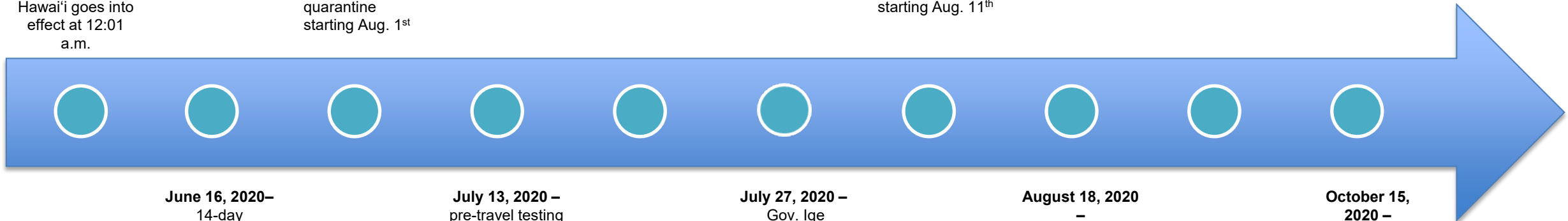
**June 16, 2020–**  
14-day quarantine requirement for interisland travelers lifted

**July 13, 2020 –**  
pre-travel testing program launch pushed back to Sept. 1<sup>st</sup>

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

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

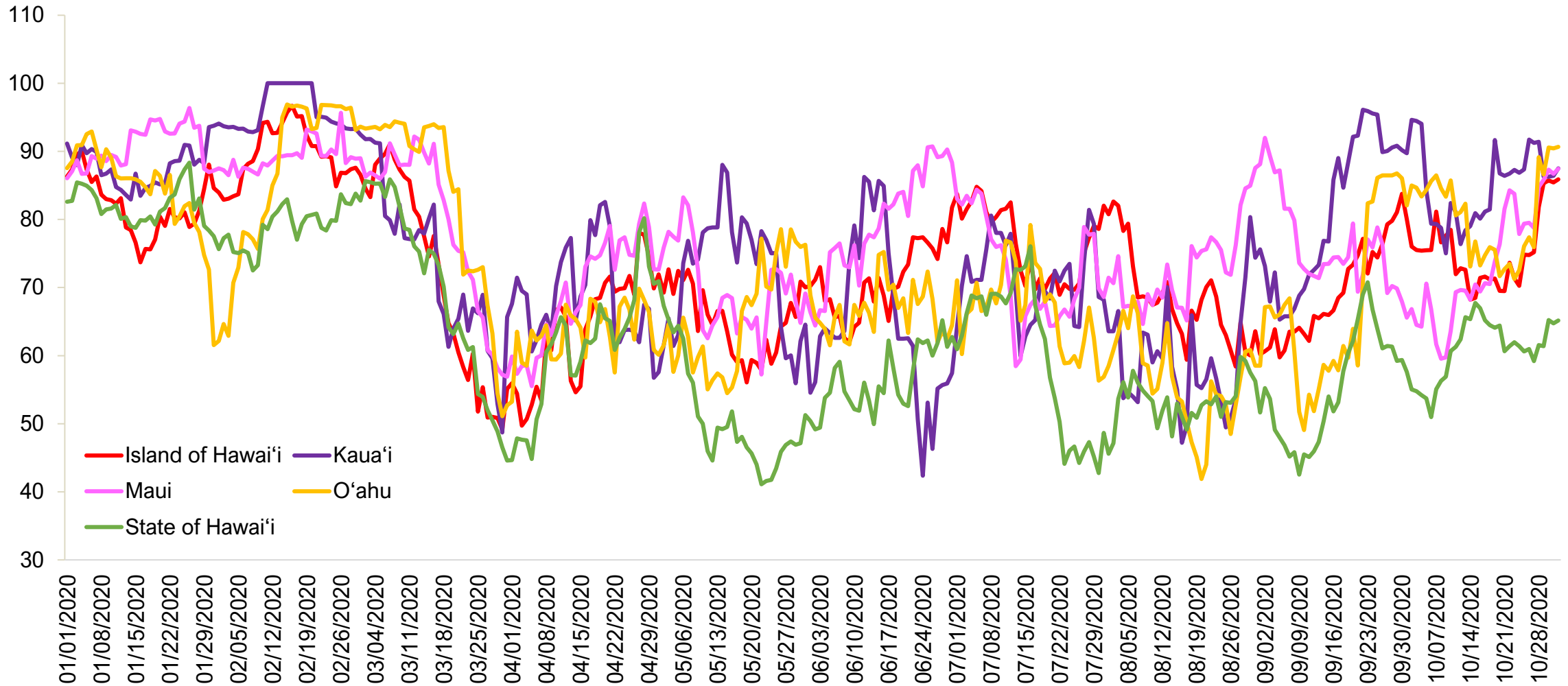
**October 15, 2020 –**  
pre-travel testing program officially begins



# U.S. Destination Index Trends



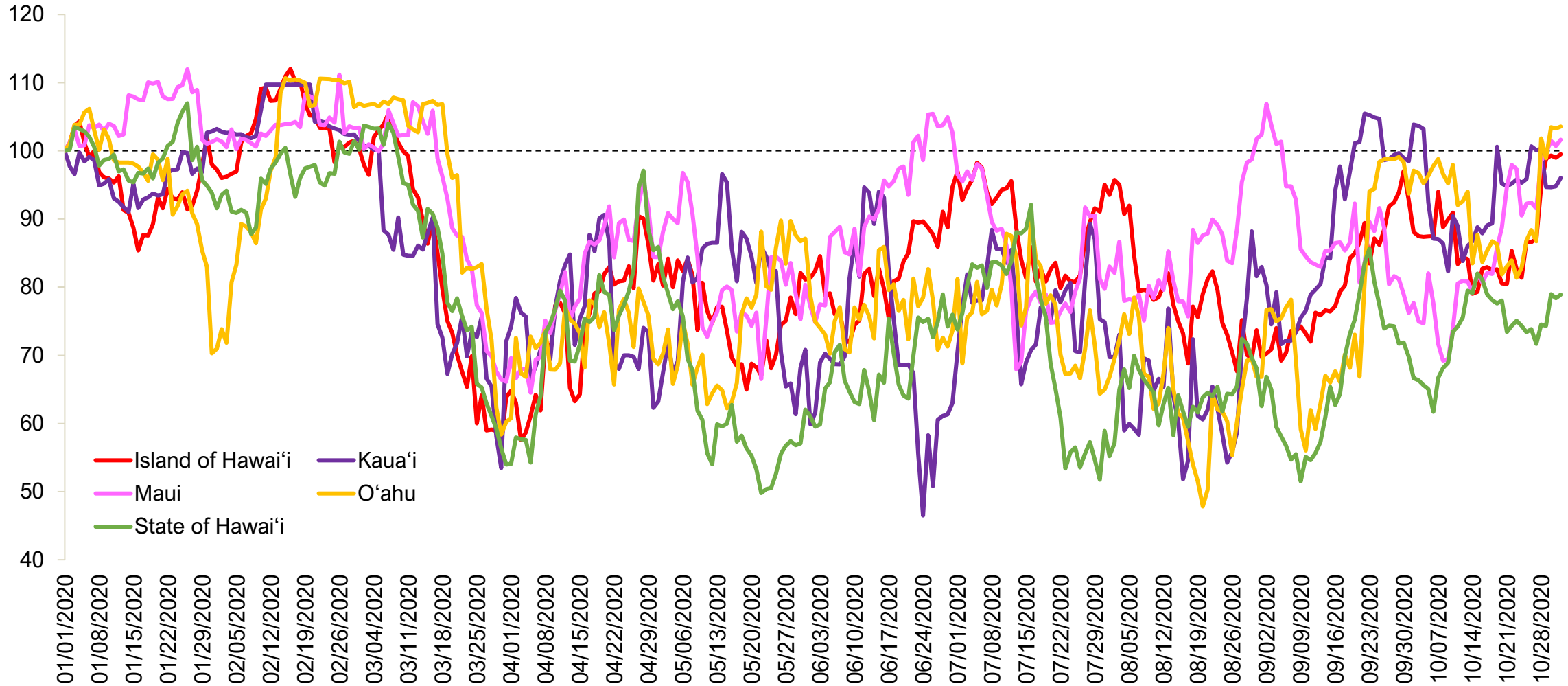
# U.S. Buzz Net Score Two-Week Moving Average



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?

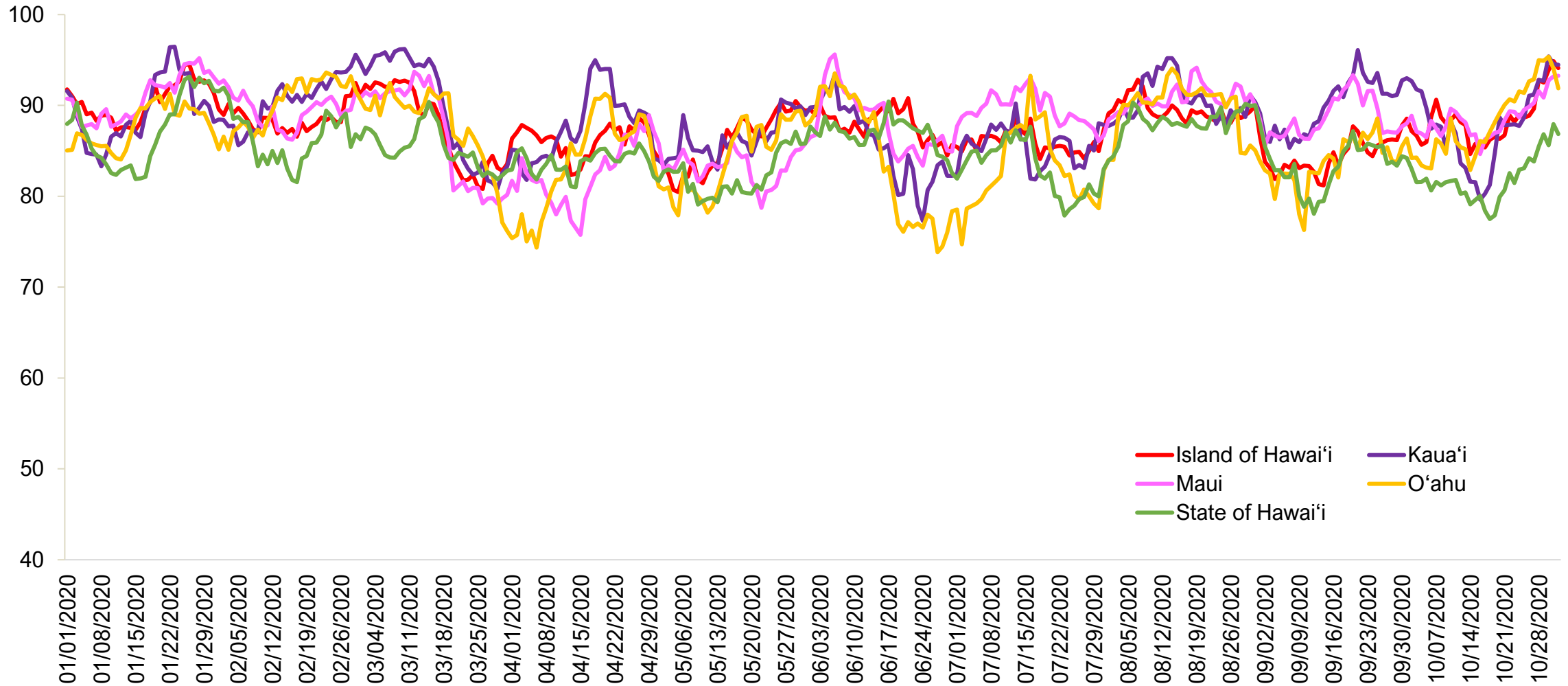


# Index of U.S. Buzz Net Score Two-Week Moving Average



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?

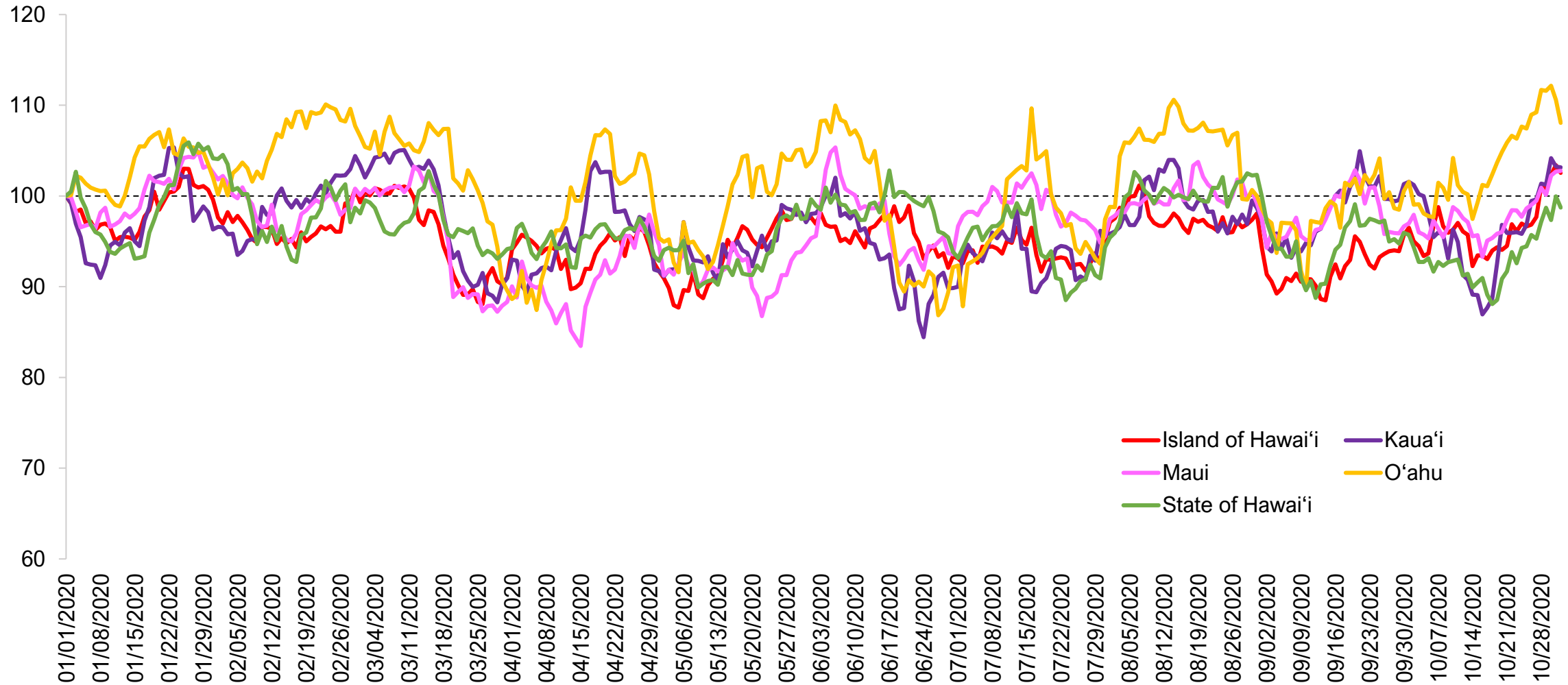
# U.S. Recommend Net Score Two-Week Moving Average



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?



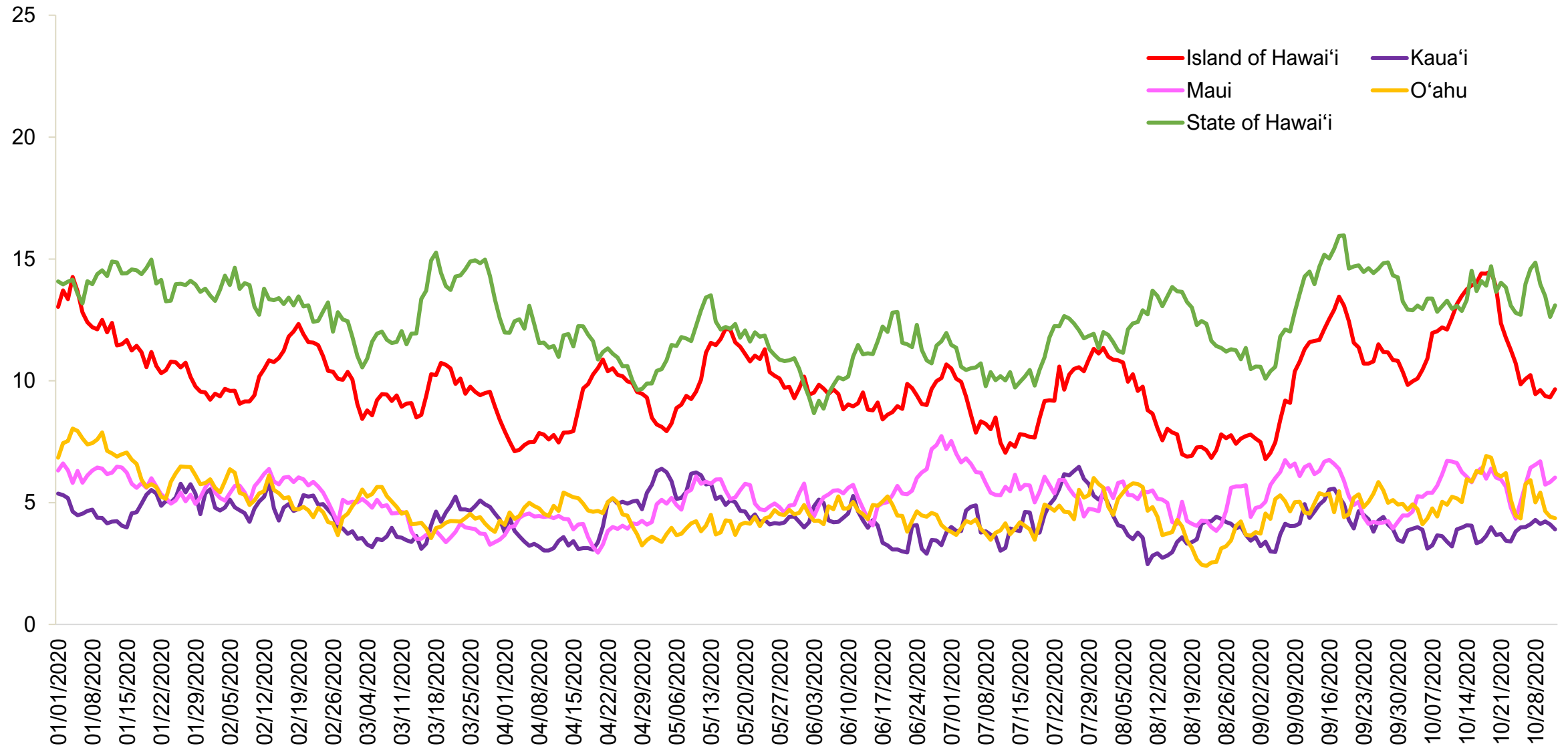
# Index of U.S. Recommend Net Score Two-Week Moving Average



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 November 01, 2020

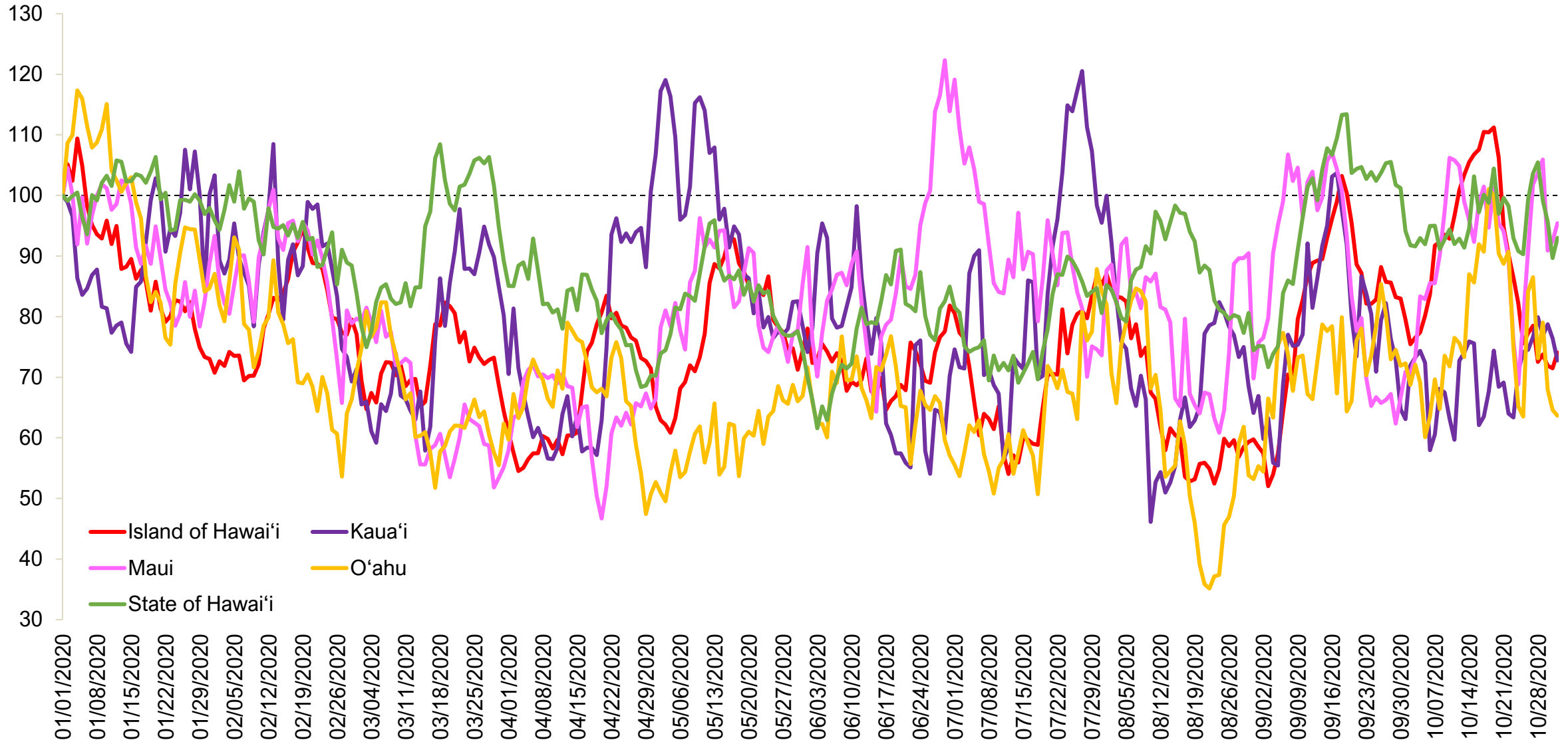
# U.S. Word of Mouth Exposure (% Yes) Two-Week Moving Average



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?)

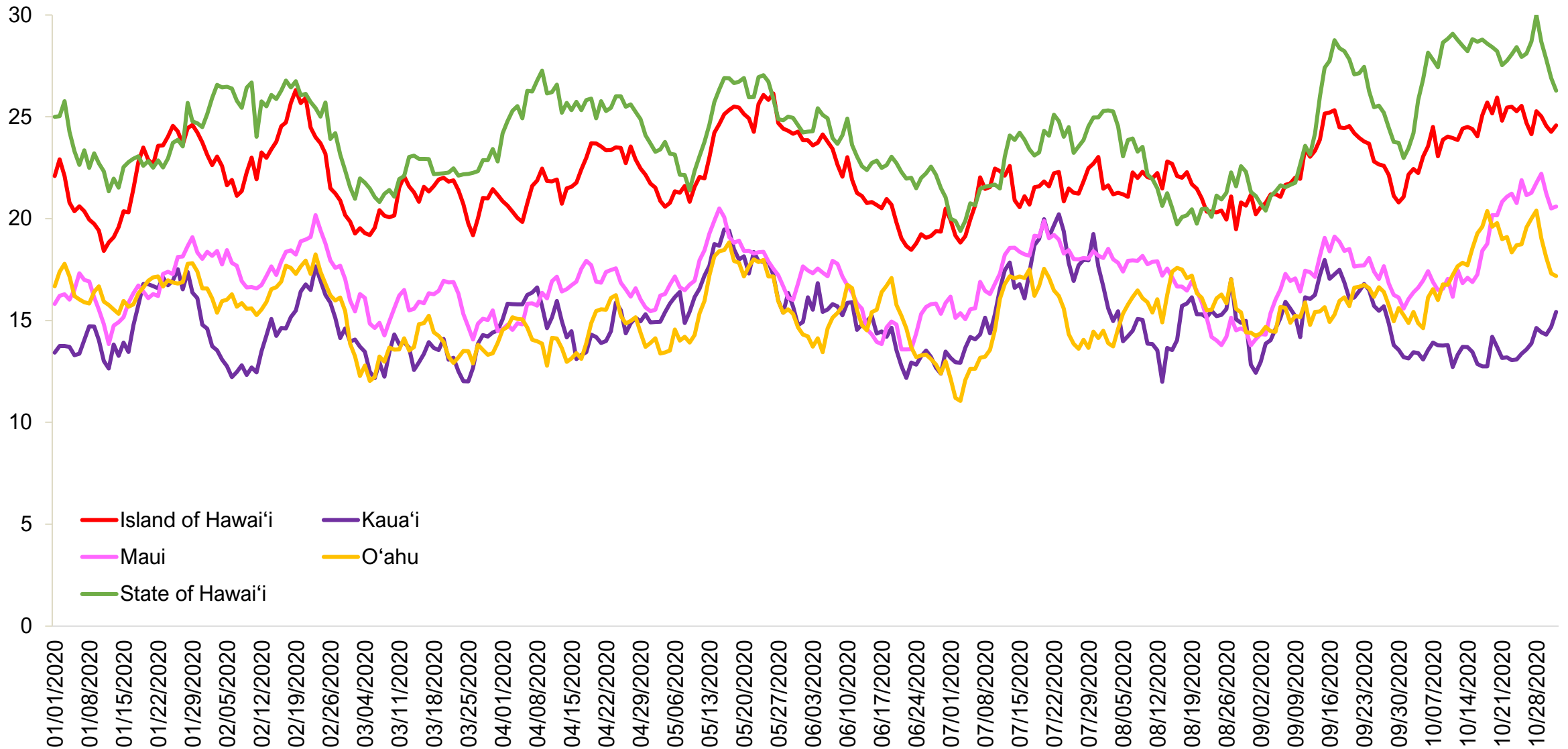
Source: YouGov data as of November 01, 2020

# 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?)

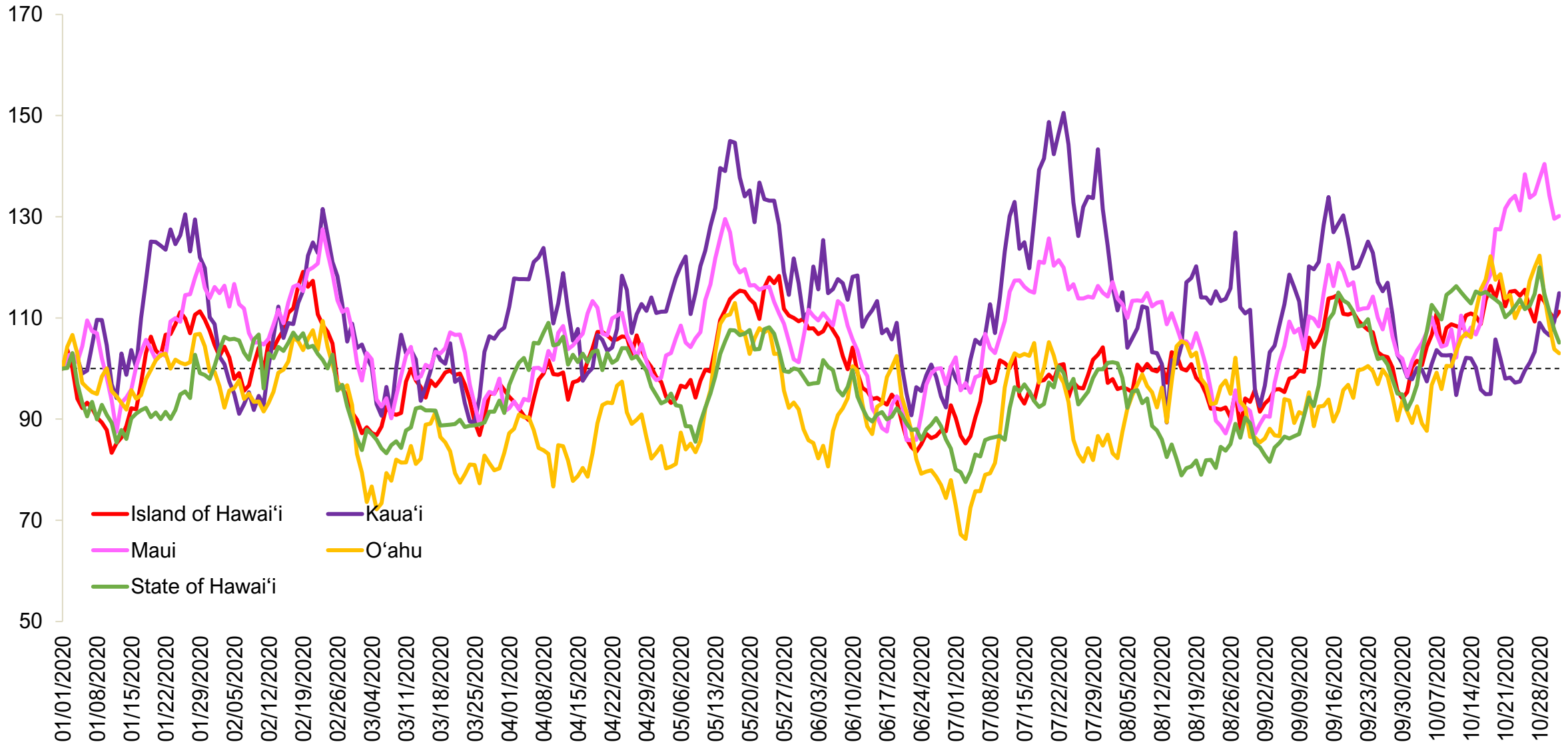
# U.S. Consideration (% Yes) Two-Week Moving Average



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 November 01, 2020

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



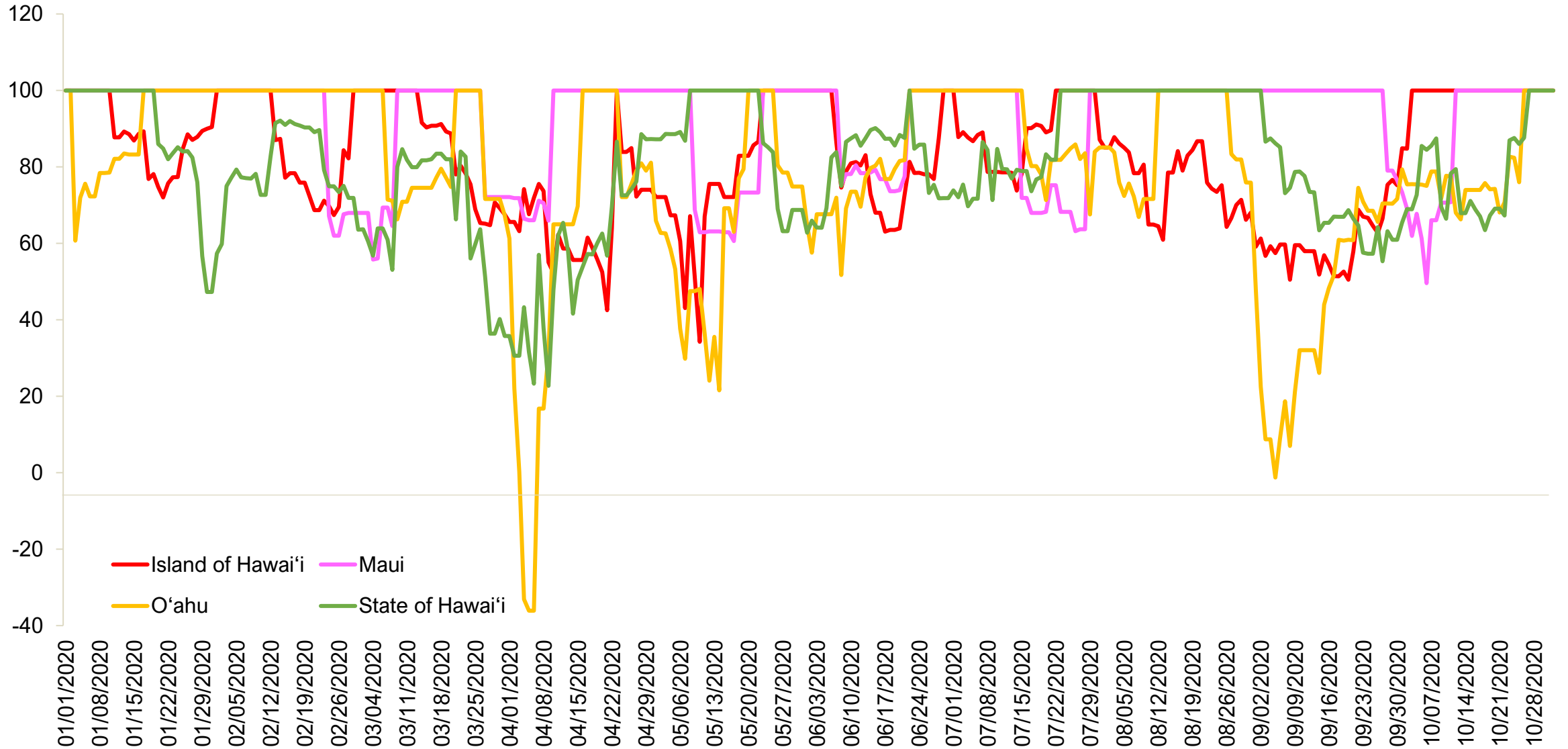
Question: (Net) Thinking about your next vacation by air alone or with friends, family, a partner or spouse, which of the following destinations would you consider?

# Japan Destination Index Trends

HAWAII TOURISM  
AUTHORITY



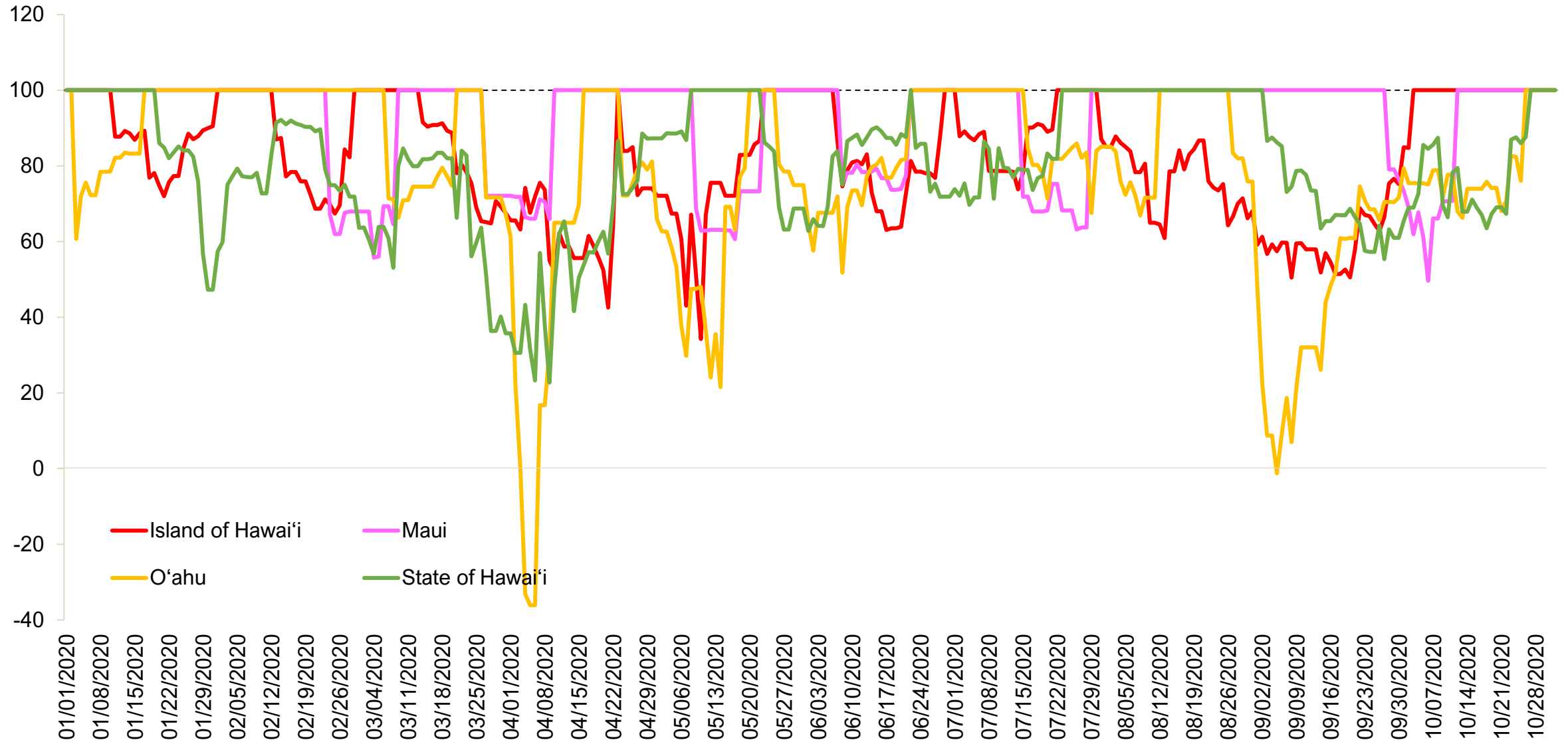
# Japan Buzz Net Score Two-Week Moving Average



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?



# Index of Japan Buzz Net Score Two-Week Moving Average

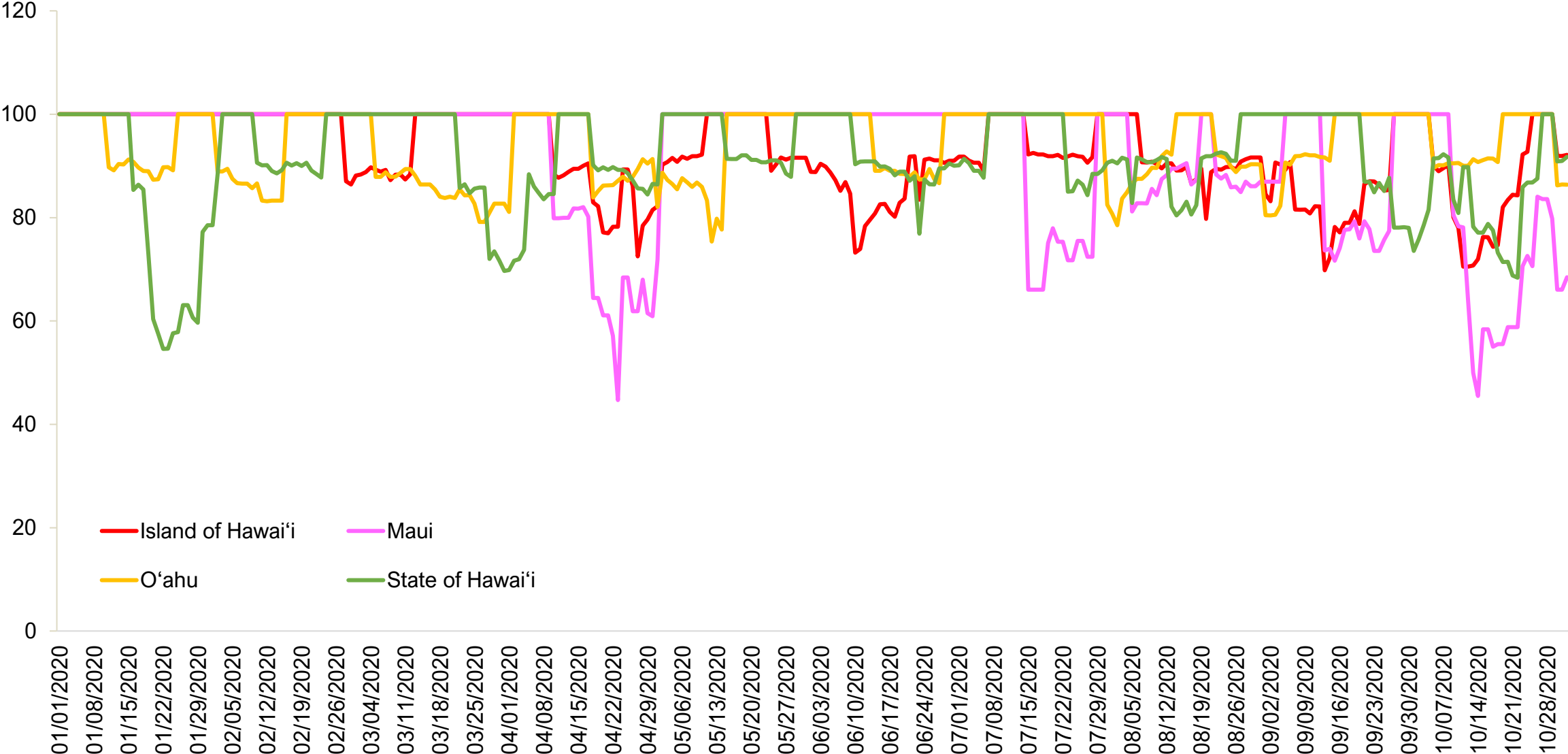


Question: (Net) Over the PAST TWO WEEKS, which of the following destinations have you heard something POSITIVE about (whether in the news, through advertising, or talking to friends and family)? / Now which of the following have you heard something NEGATIVE about over the PAST TWO WEEKS?

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

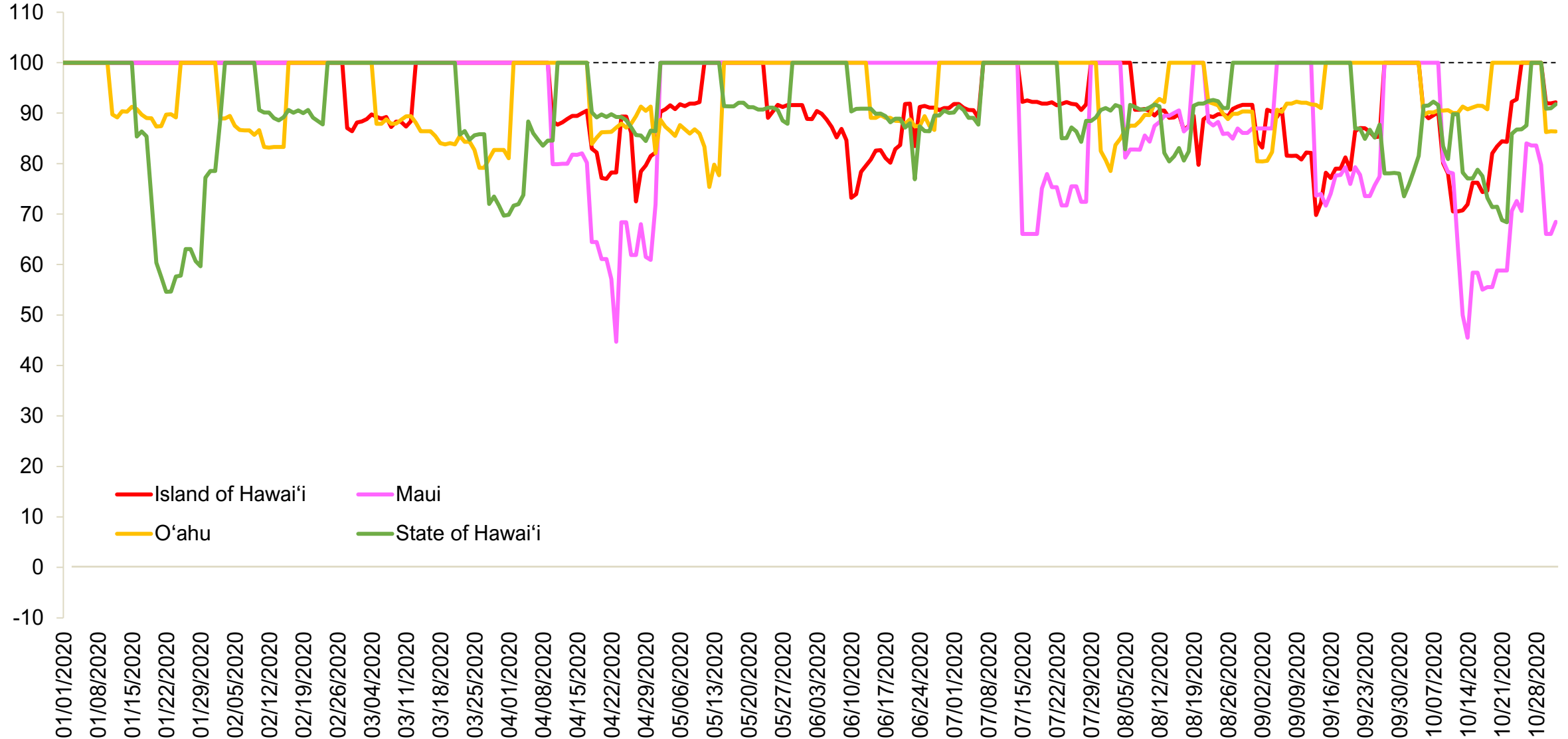
Source: YouGov data as of November 01, 2020

# 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?

# Index of Japan Recommend Net Score Two-Week Moving Average

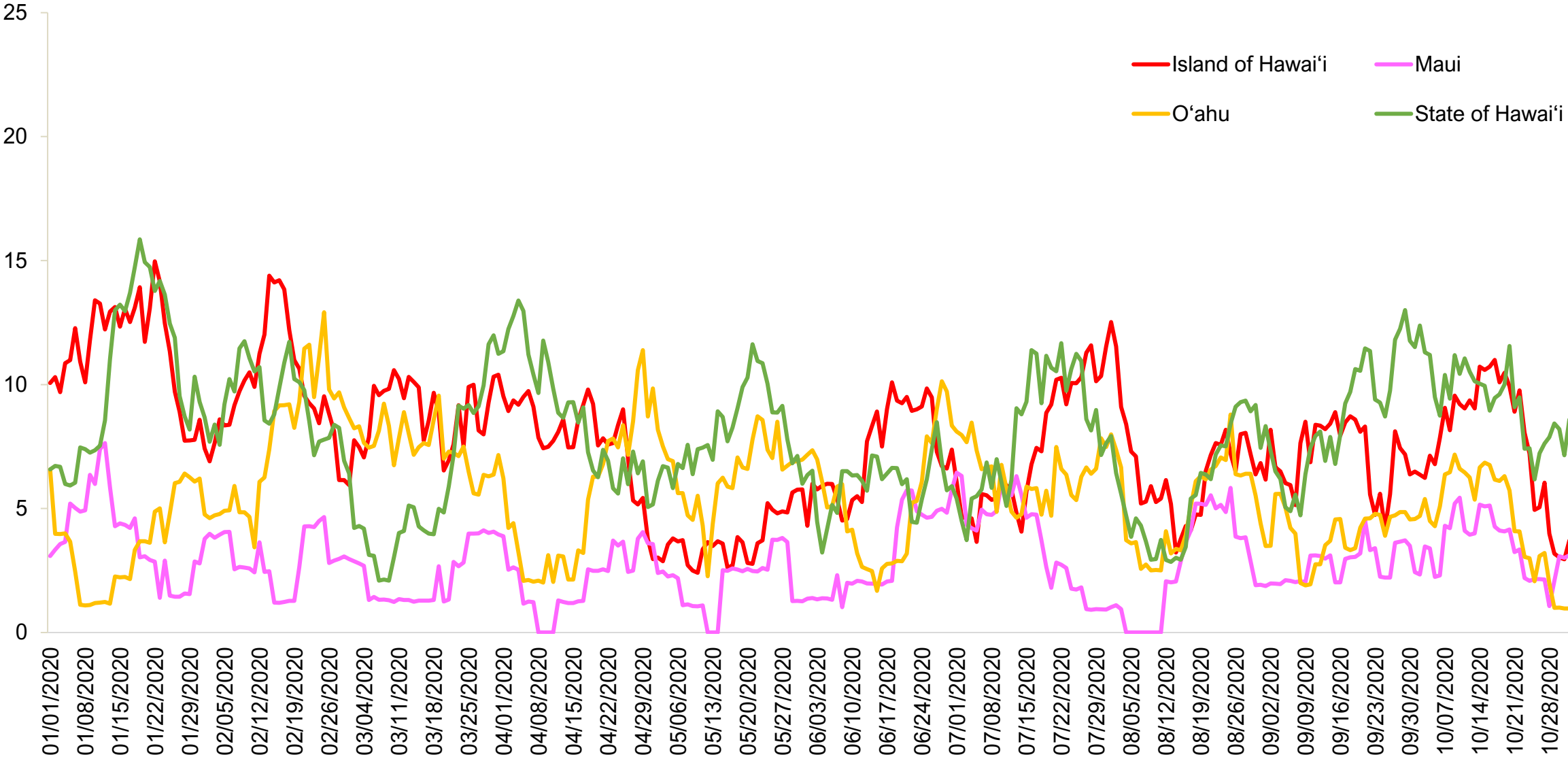


Question: (Net) Which of the following destinations would you RECOMMEND to a friend or colleague? / And which of the following destinations would you tell a friend or colleague to AVOID?

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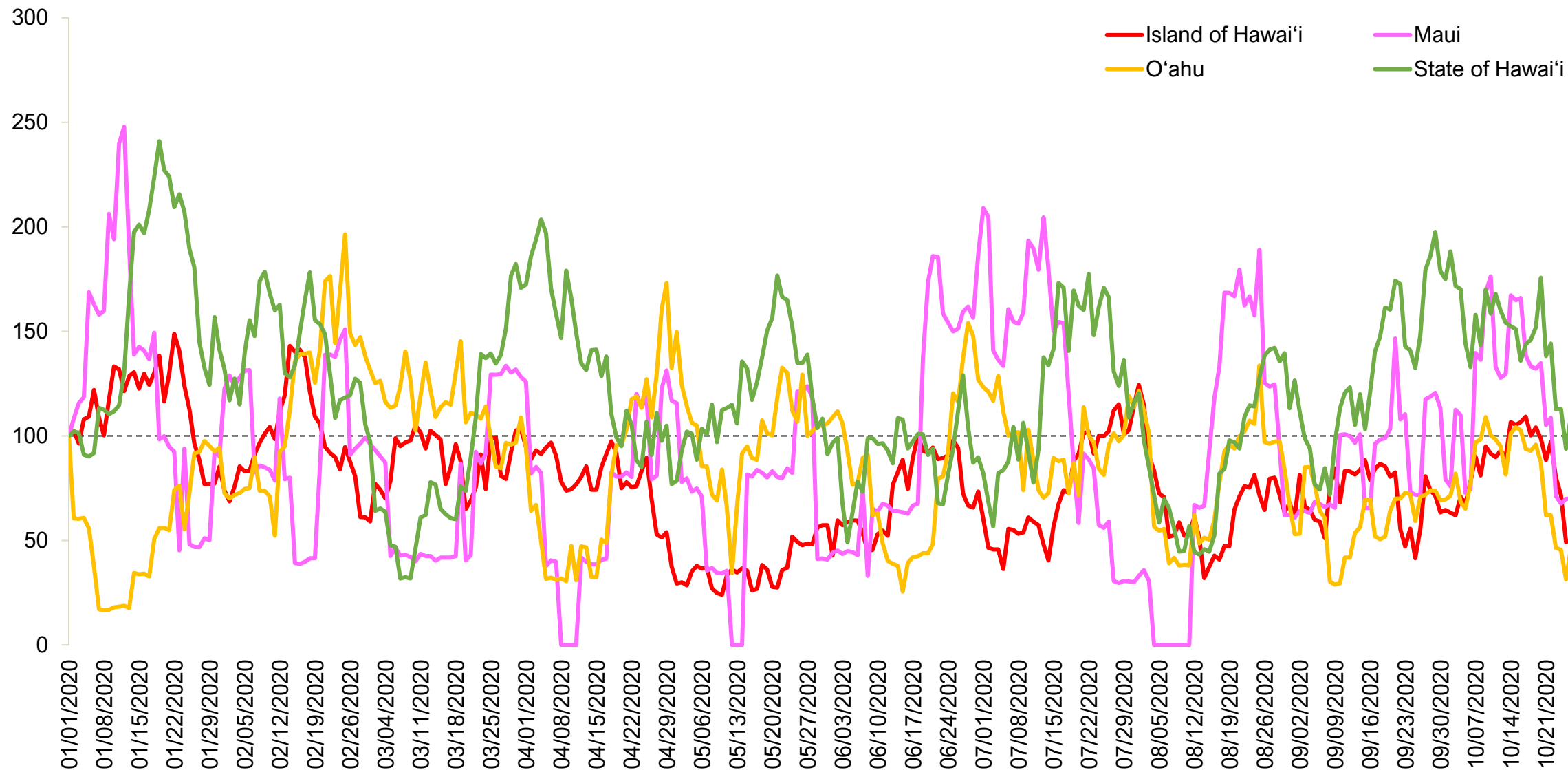
Source: YouGov data as of November 01, 2020

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



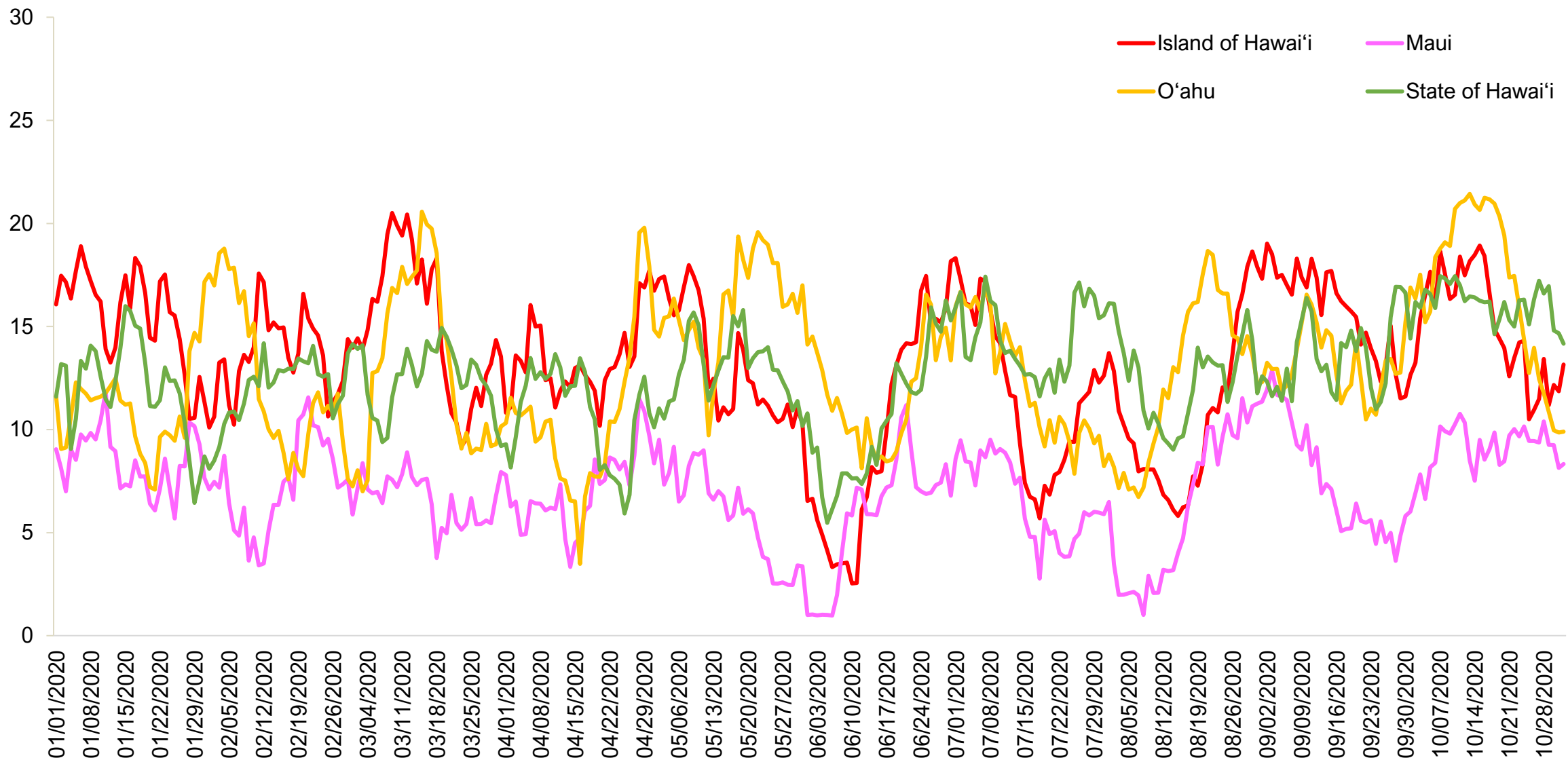
Question: (Net) Which of the following destinations have you talked about with friends and family in the PAST TWO WEEKS (whether in-person, online, or through social media?)

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



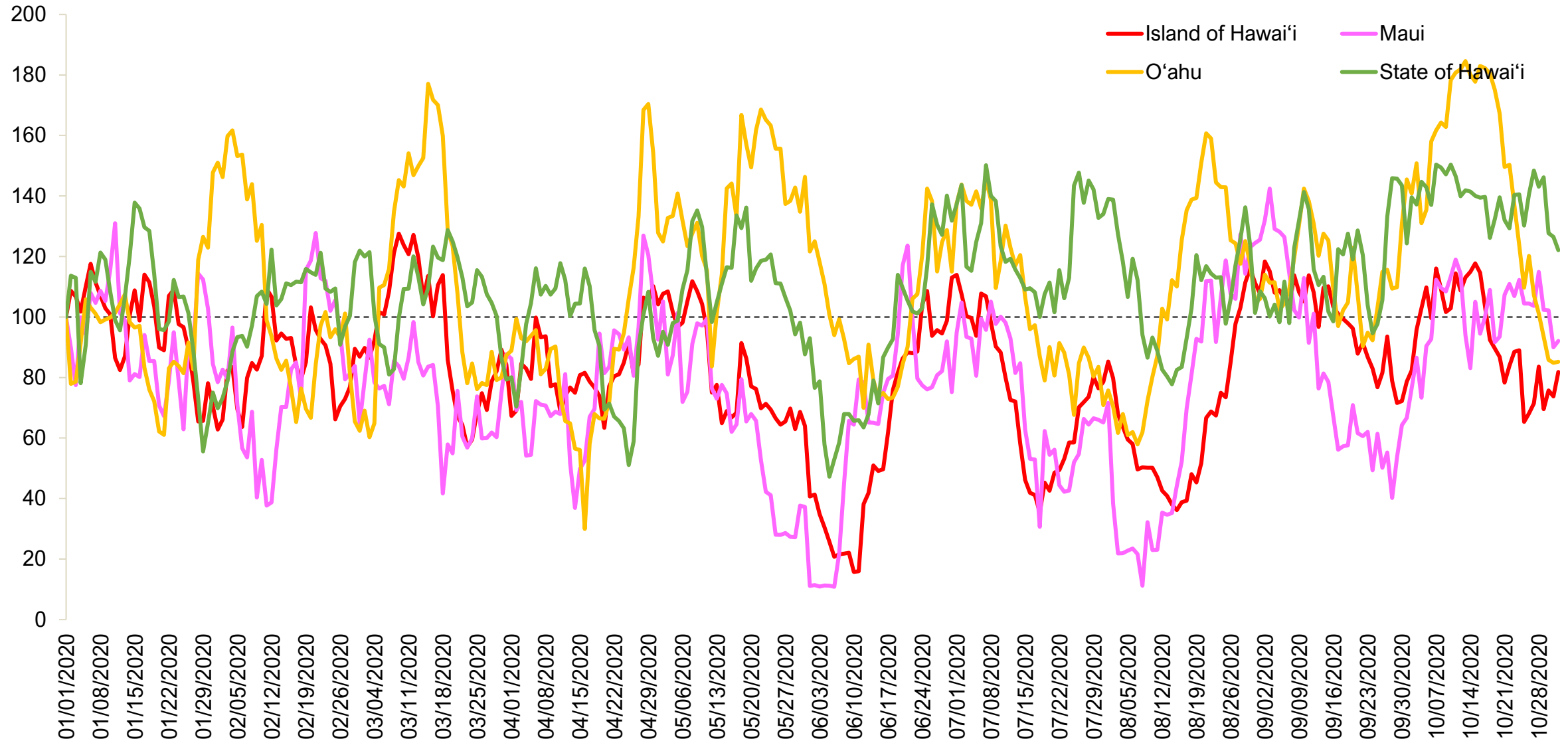
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# Japan Consideration (% Yes) Two-Week Moving Average



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?

# 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?

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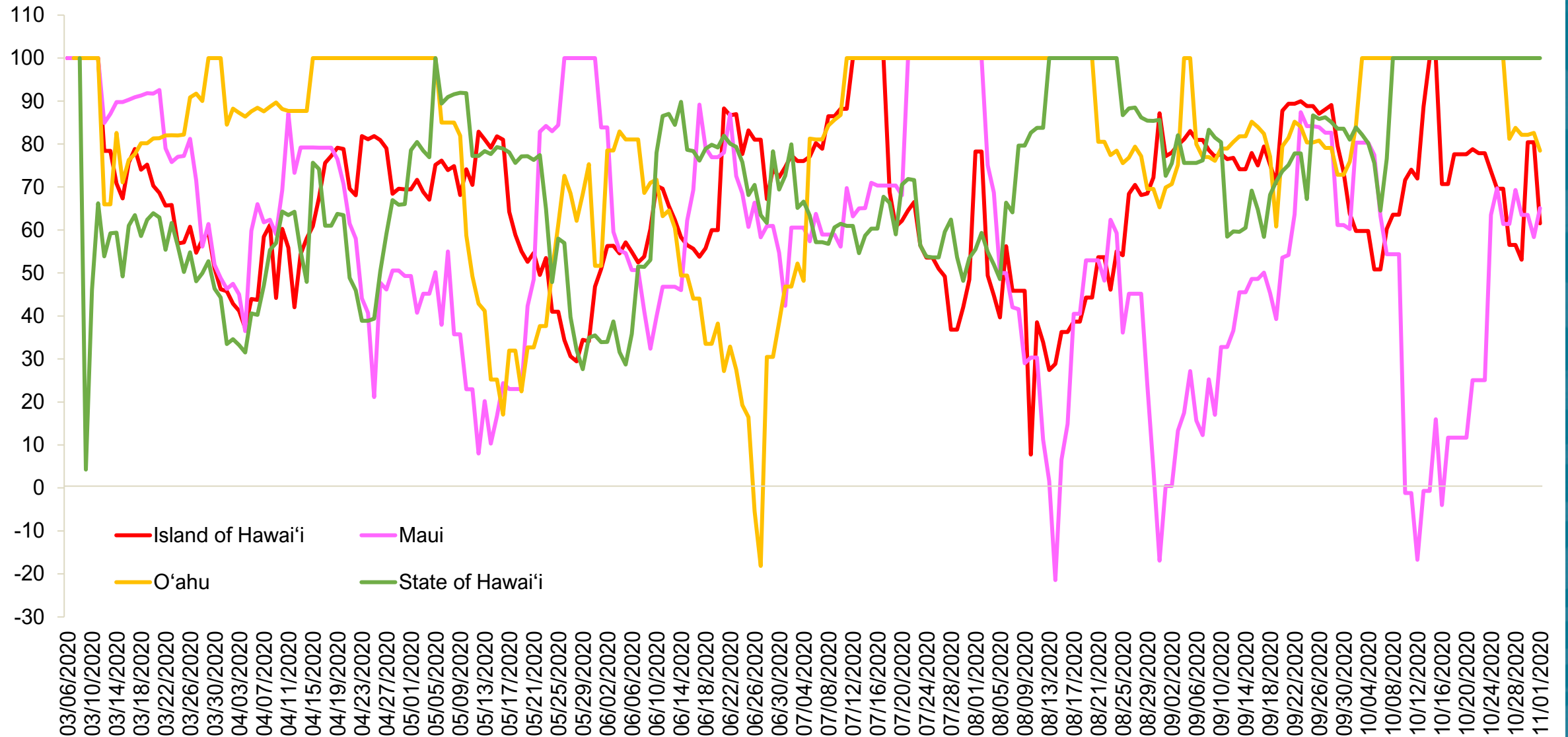
Source: YouGov data as of November 01, 2020



# Australia Destination Index Trends



# Australia Buzz Net Score Two-Week Moving Average

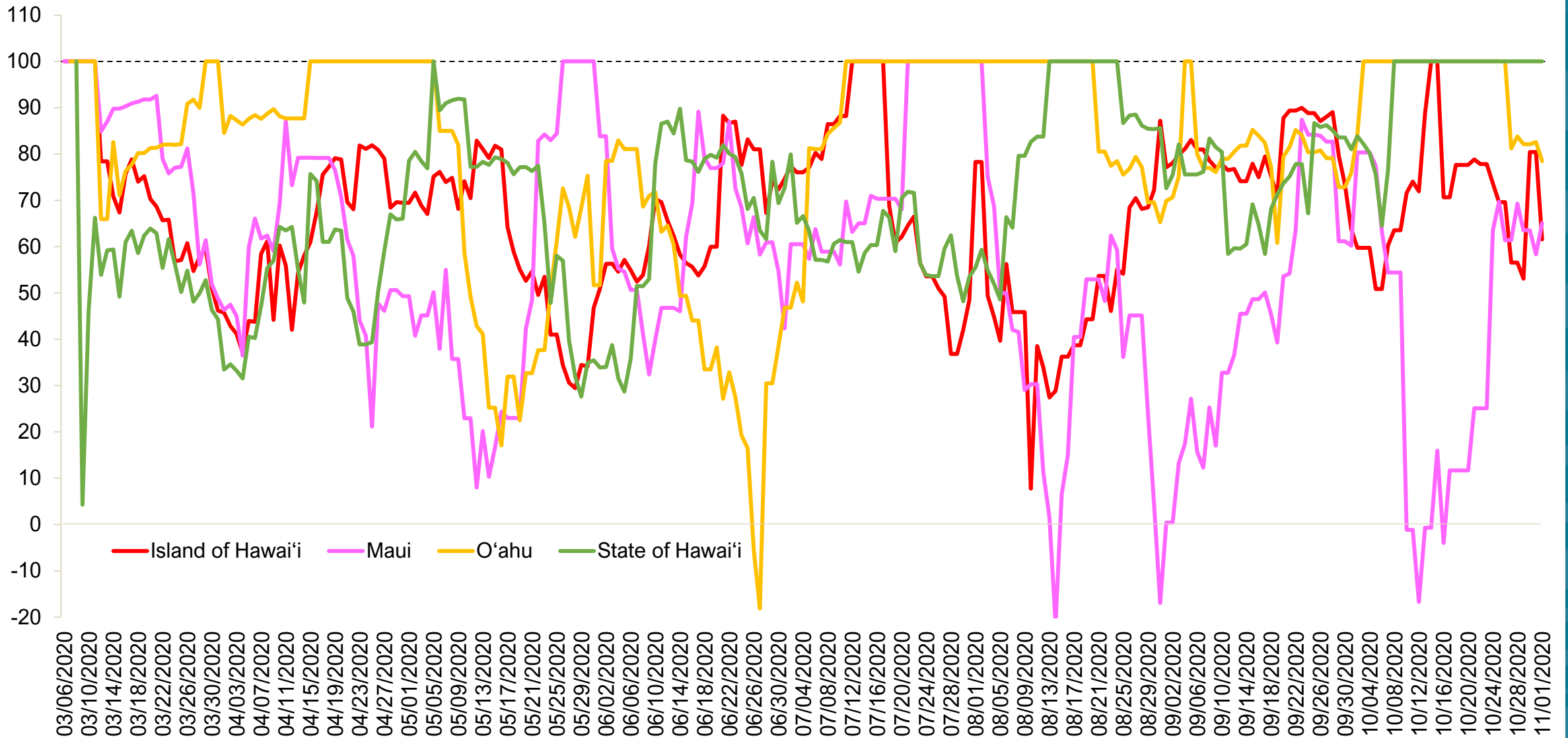


Question: (Net) Over the PAST TWO WEEKS, which of the following destinations have you heard something POSITIVE about (whether in the news, through advertising, or talking to friends and family)? / Now which of the following have you heard something NEGATIVE about over the PAST TWO WEEKS?

*\*Kauai is not included due to low response volume*

Source: YouGov data as of November 01, 2020

# Index of Australia Buzz Net Score Two-Week Moving Average

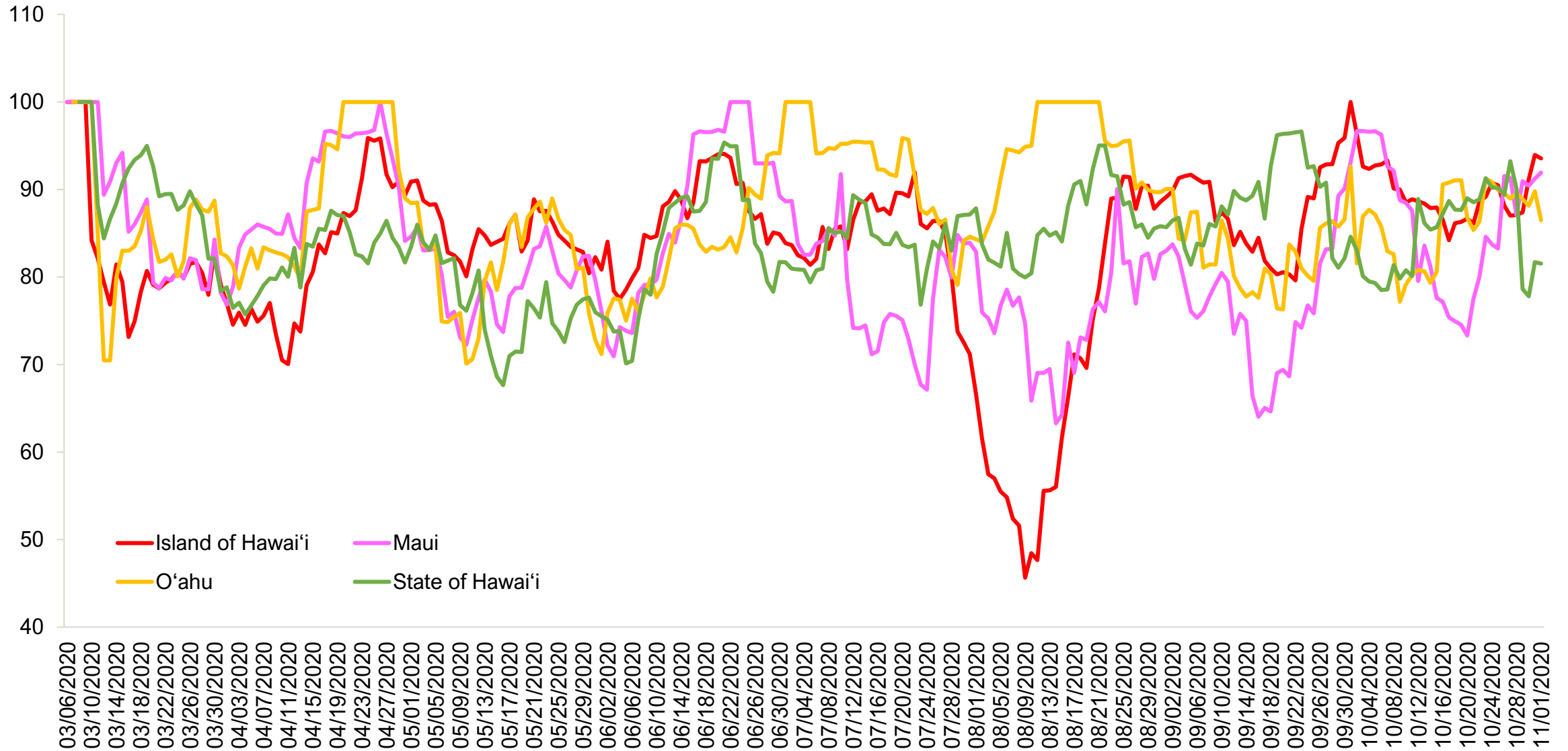


Question: (Net) Over the PAST TWO WEEKS, which of the following destinations have you heard something POSITIVE about (whether in the news, through advertising, or talking to friends and family)? / Now which of the following have you heard something NEGATIVE about over the PAST TWO WEEKS?

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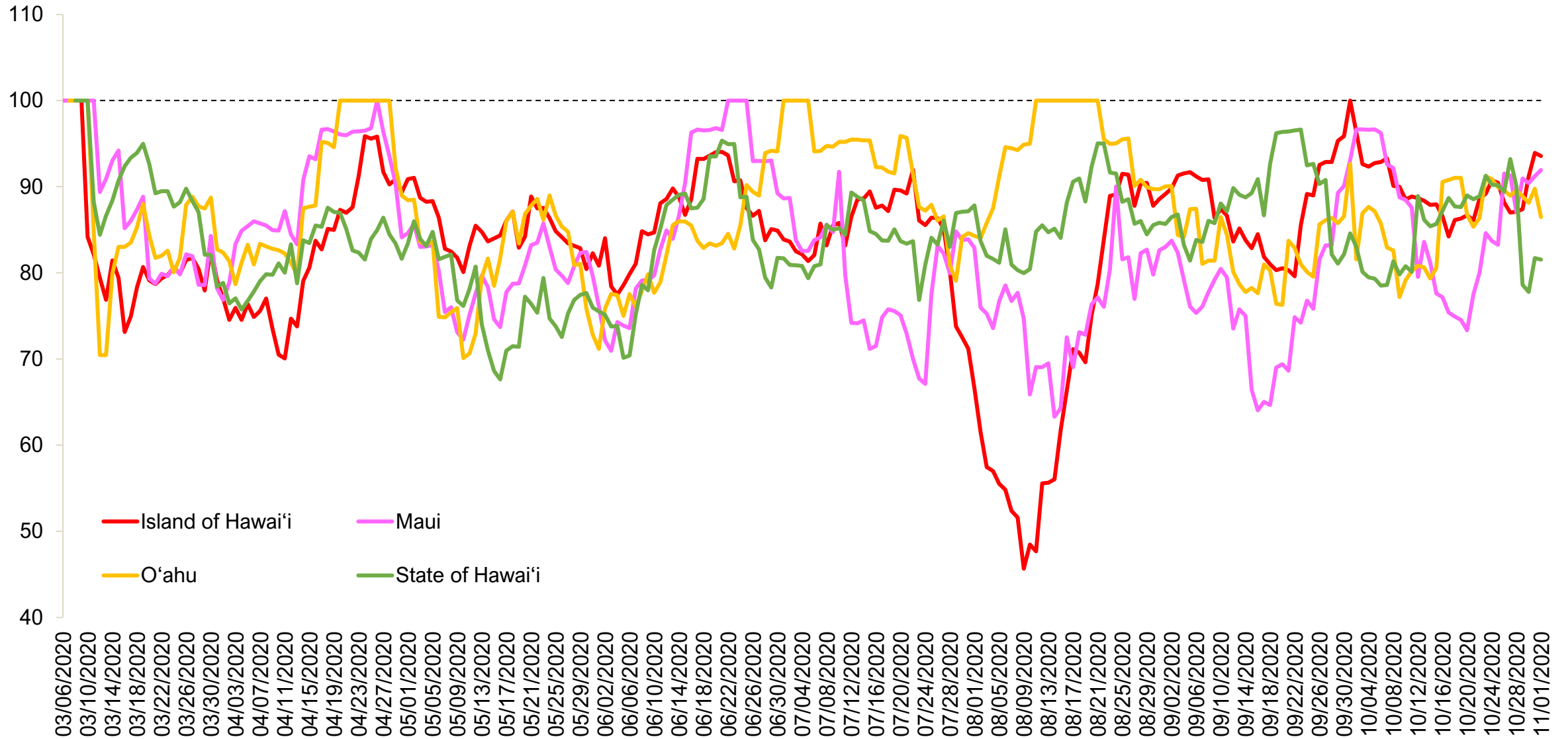
Source: YouGov data as of November 01, 2020

# 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?

# Index of Australia Recommend Net Score Two-Week Moving Average

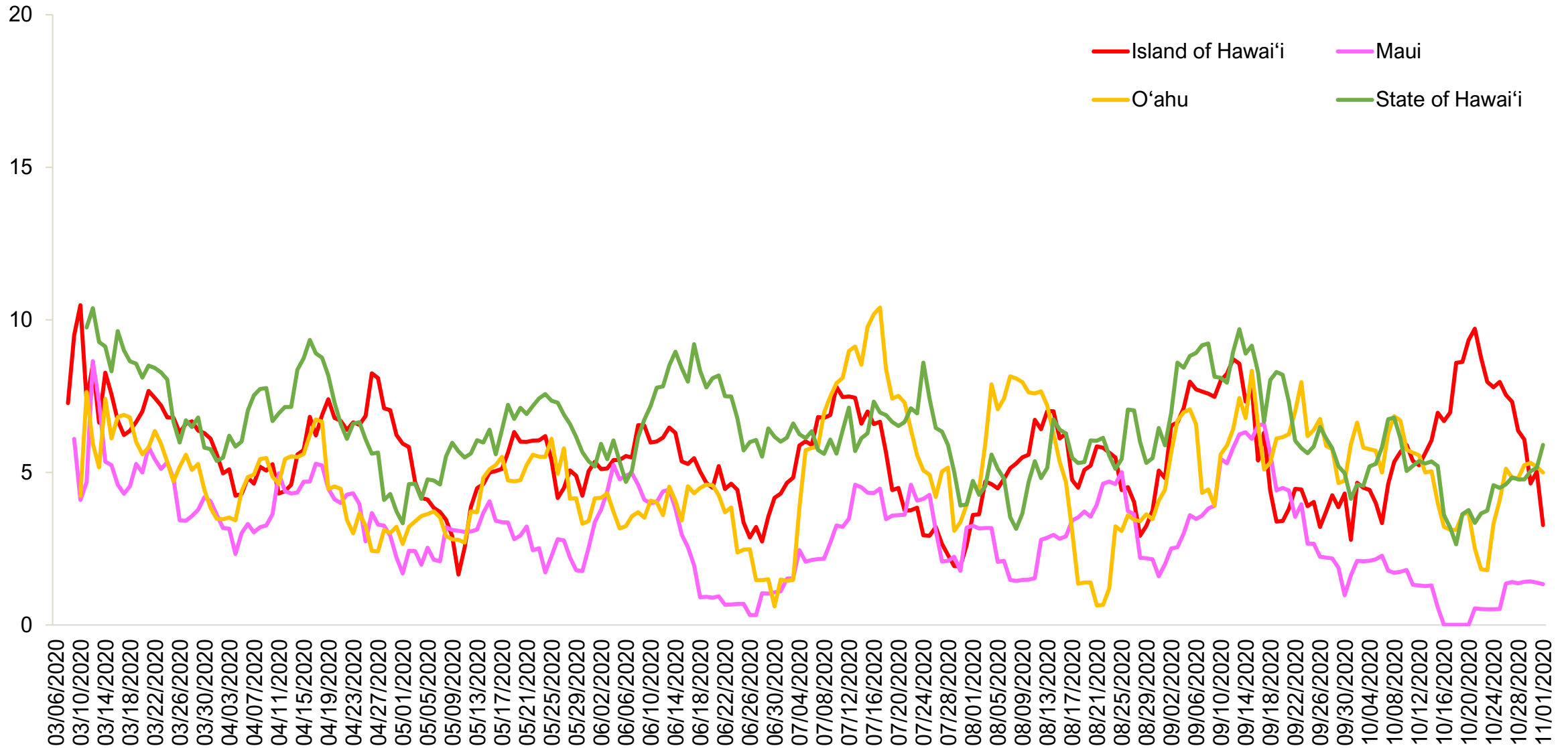


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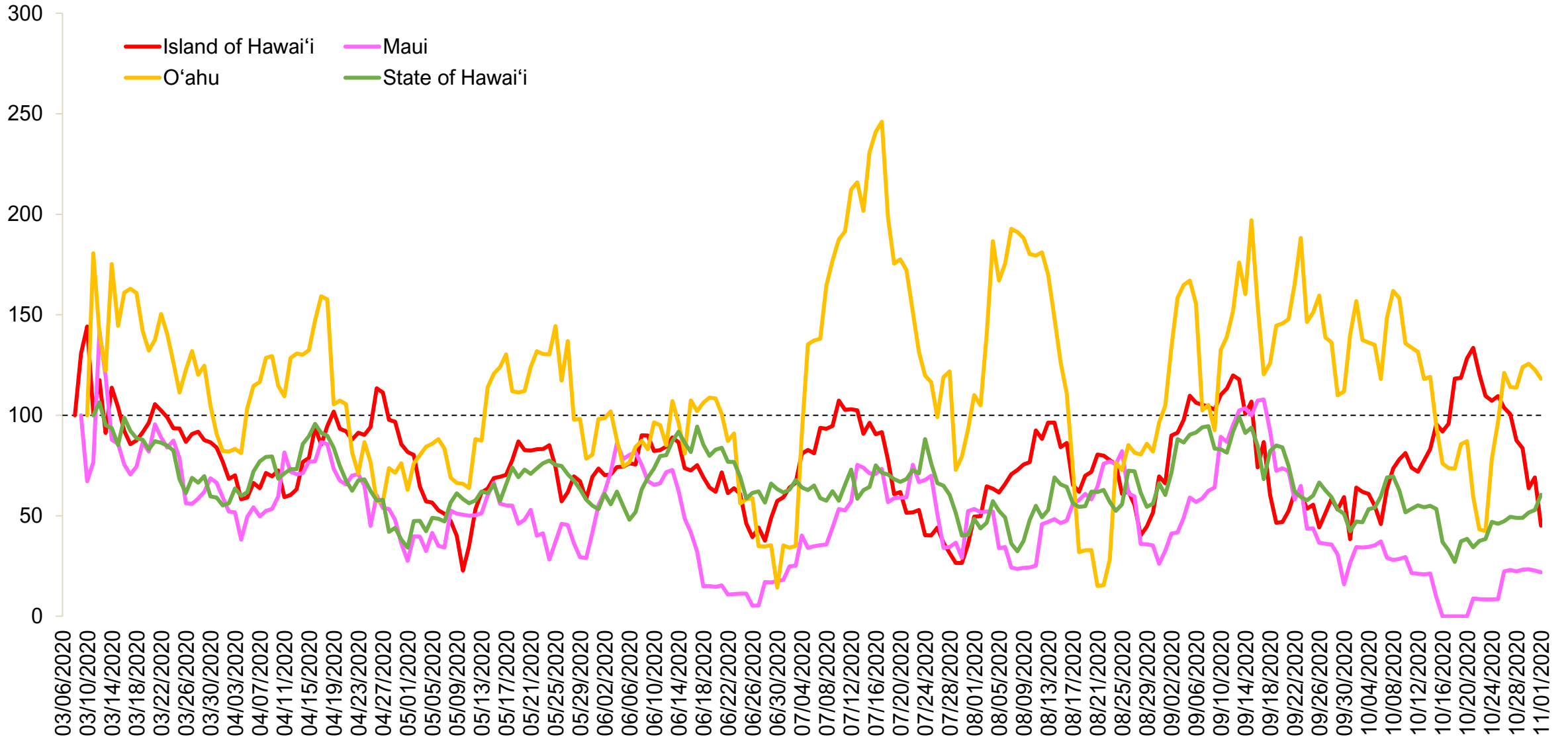
Source: YouGov data as of November 01, 2020

# 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?)

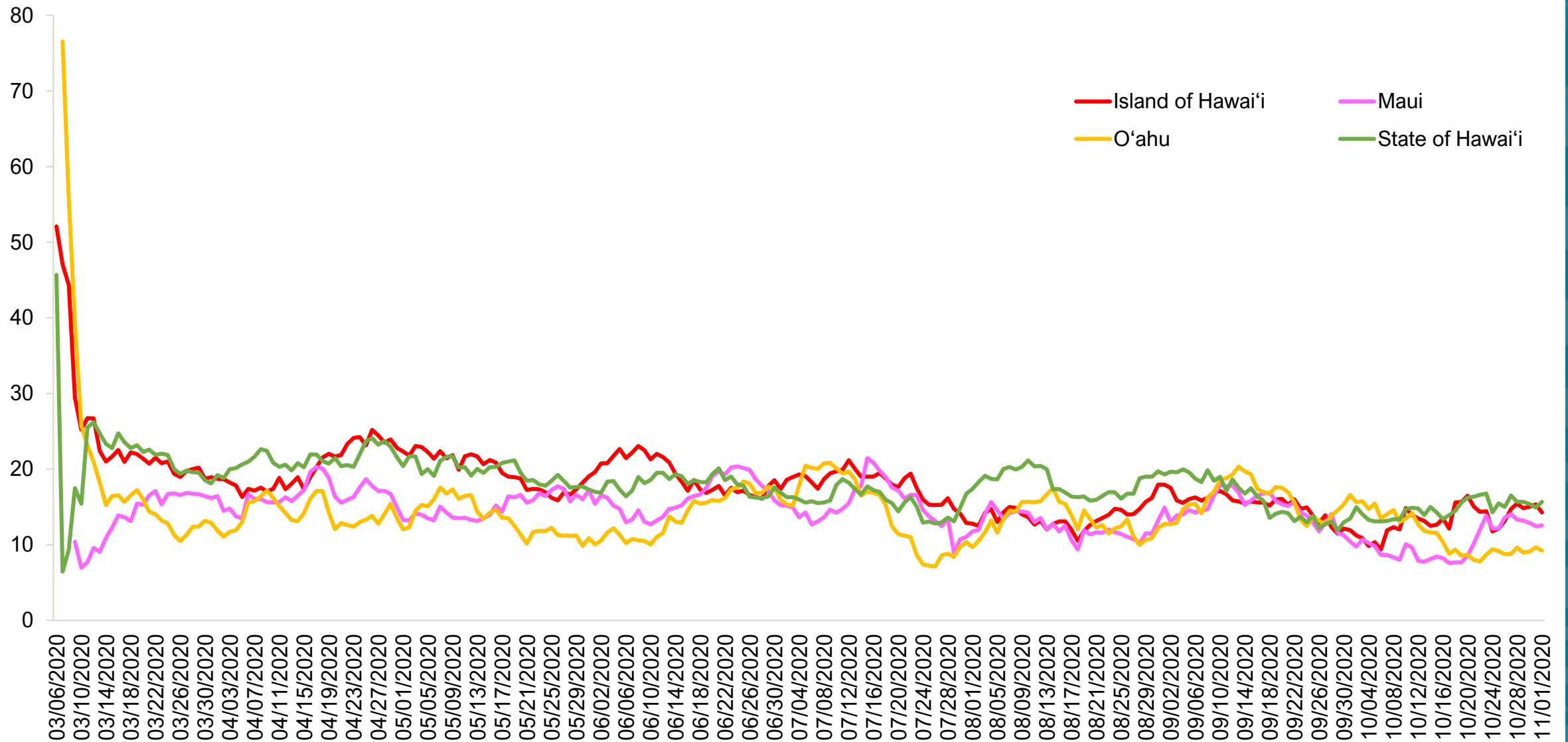
# Index of Australia Word of Mouth Exposure (% Yes) Two-Week Moving Average



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?)

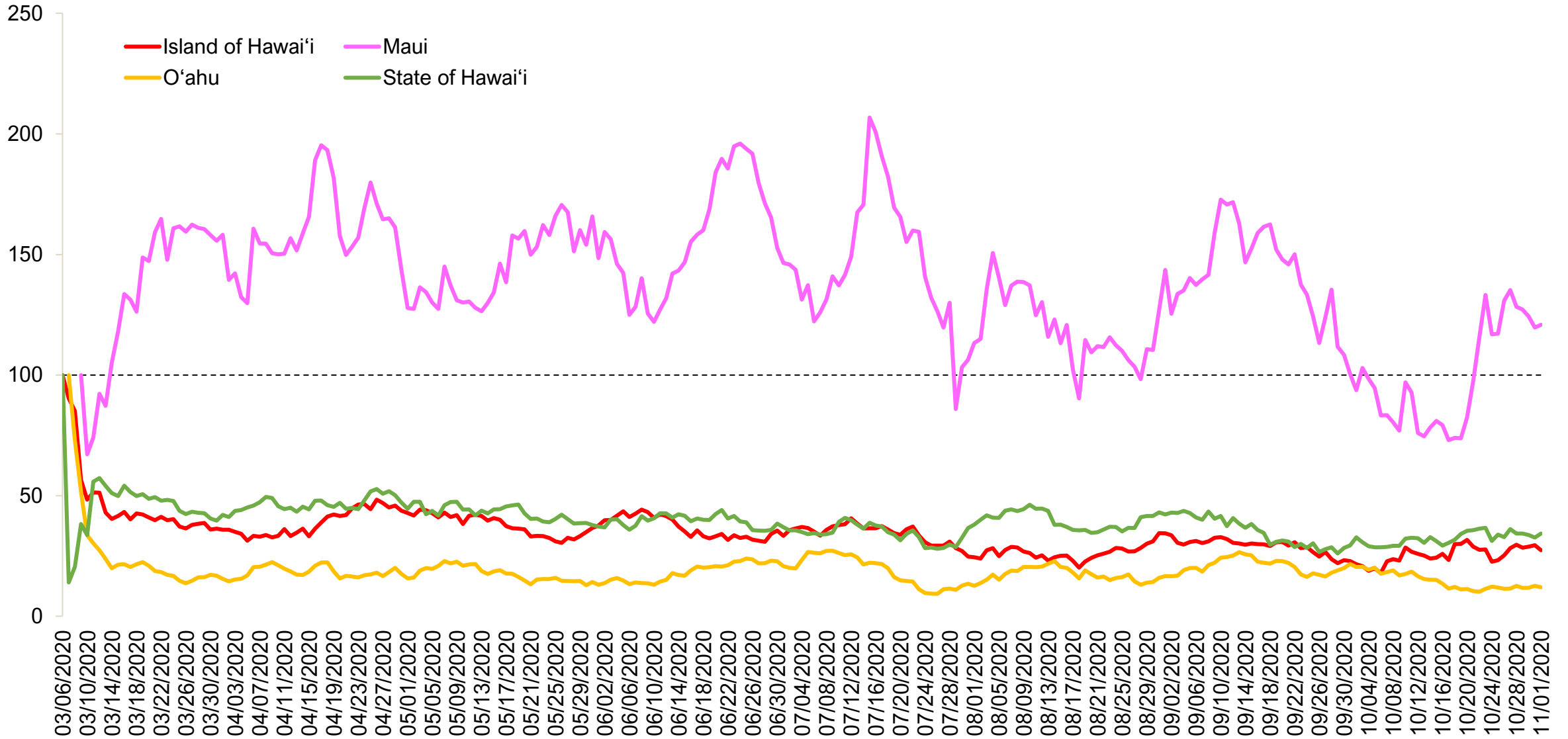


# Australia Consideration (% Yes) Two-Week Moving Average



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?

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



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