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 Description</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. 1st</td>
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<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. 11th</td>
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<tr>
<td>June 16, 2020</td>
<td>14-day quarantine requirement for interisland travelers lifted</td>
</tr>
<tr>
<td>July 13, 2020</td>
<td>Gov. Ige announces pre-travel testing program launch pushed back to Sept. 1st</td>
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<td>July 27, 2020</td>
<td>Gov. Ige announces that Hawai‘i is being considered by Japan for resumption of international travel</td>
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<td>August 18, 2020</td>
<td>pre-travel testing program launch pushed back to Oct. 1st, at the earliest</td>
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<tr>
<td>November 24, 2020</td>
<td>Kaua‘i County announces they will opt out of Safe Travels program starting Dec. 2nd</td>
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<tr>
<td>September 16, 2020</td>
<td>pre-travel testing program launch pushed to Oct. 15th</td>
</tr>
<tr>
<td>October 15, 2020</td>
<td>pre-travel testing program officially begins</td>
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</tbody>
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**Safe Travels Program**

- **March 26, 2020**: Quarry mandate 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.
- **July 25-26, 2020**: Hurricane Douglas passes close to the Hawaiian Islands.
- **August 6, 2020**: Gov. Ige announces that interisland travel quarantine will be reinstated starting Aug. 11th.
- **June 16, 2020**: 14-day quarantine requirement for interisland travelers lifted.
- **July 13, 2020**: Gov. Ige announces pre-travel testing program launch pushed back to Sept. 1st.
- **July 27, 2020**: Gov. Ige announces that Hawai‘i is being considered by Japan for resumption of international travel.
- **August 18, 2020**: Pre-travel testing program launch pushed back to Oct. 1st, at the earliest.
- **November 24, 2020**: Kaua‘i County announces they will opt out of Safe Travels program starting Dec. 2nd.
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 December 06, 2020
Index of U.S. Buzz Net Score Two-Week Moving Average

Island of Hawai'i  Kaua'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?

Source: YouGov data as of December 06, 2020
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: YouGov data as of December 06, 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?

Source: HVCB analysis of YouGov data as of December 06, 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 December 06, 2020

December 07, 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 December 06, 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 December 06, 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 December 06, 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
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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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 December 06, 2020
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 December 06, 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 December 06, 2020
Index of Japan Word of Mouth Exposure (% Yes) Two-Week Moving Average

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

Source: YouGov data as of December 06, 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 December 06, 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 December 06, 2020
Australia Destination Index Trends
Australia Buzz Net Score Two-Week Moving Average

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 December 06, 2020
Index of Australia Buzz Net Score Two-Week Moving Average

December 07, 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 December 06, 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.
Index of Australia Recommend Net Score Two-Week Moving Average

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

Source: YouGov data as of December 06, 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?)

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

Source: YouGov data as of December 06, 2020
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?)

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

Source: YouGov data as of December 06, 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 December 06, 2020

*December 07, 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?)

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