YouGov Destination Index Trends

January 19, 2021



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.

Significant Dates

March 26, 2020 – mandated 14day quarantine for all travelers coming to Hawai'i goes into effect at 12:01 a.m. June 24, 2020– Gov. Ige announces pretravel 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 – 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























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

pre-travel testing program launch pushed back to Sept.

July 13, 2020

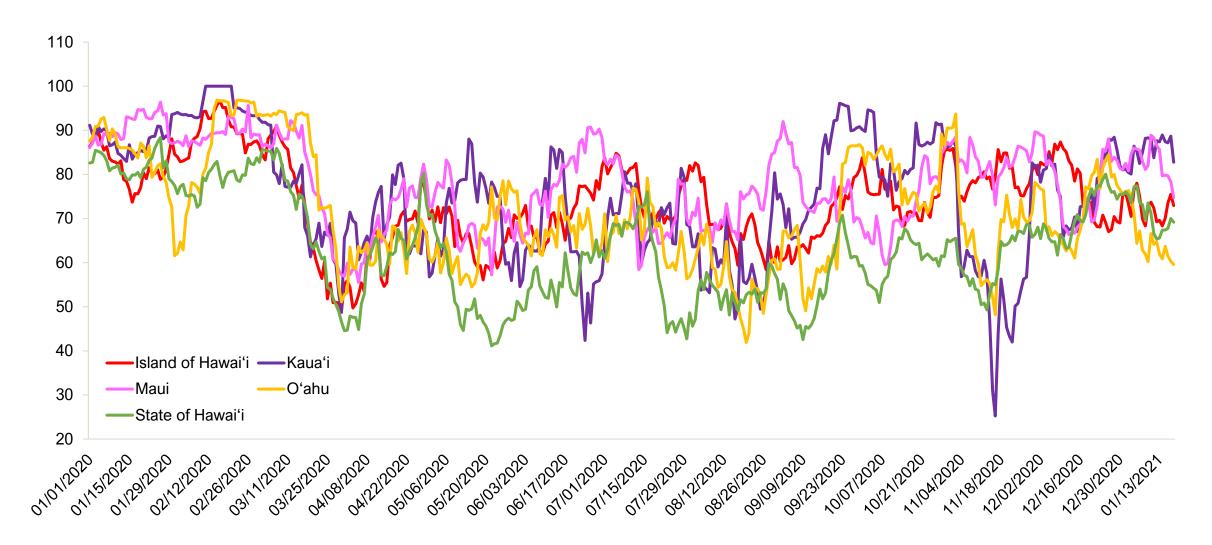
July 27, 2020 – Gov. Ige announces Hawai'i is being considered by Japan for resumption of international travel August 18, 2020 – pre-travel testing program launch pushed back to Oct. 1st, at the earliest October 15, 2020 – pre-travel testing program officially begins



U.S. Destination Index Trends

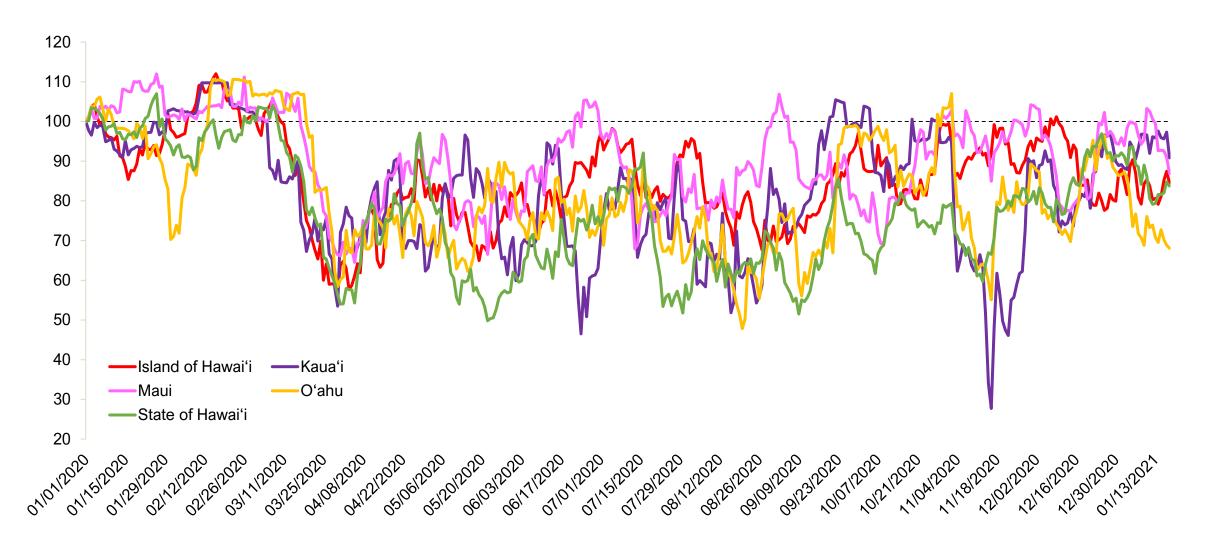
HAWAI'I TOURISM

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



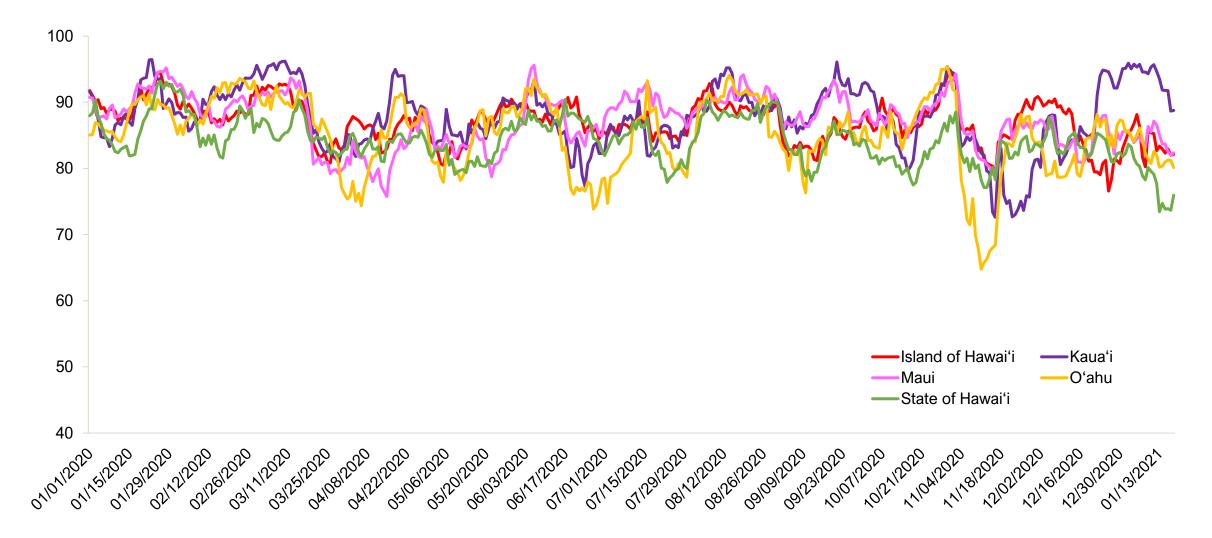
Question: (Net) Over the PAST TWO WEEKS, which of the following destinations have you heard something POSITIVE about (whether in the news, through advertising, or talking to friends and family)? / Now which of the following have you heard something NEGATIVE about over the PAST TWO WEEKS?

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



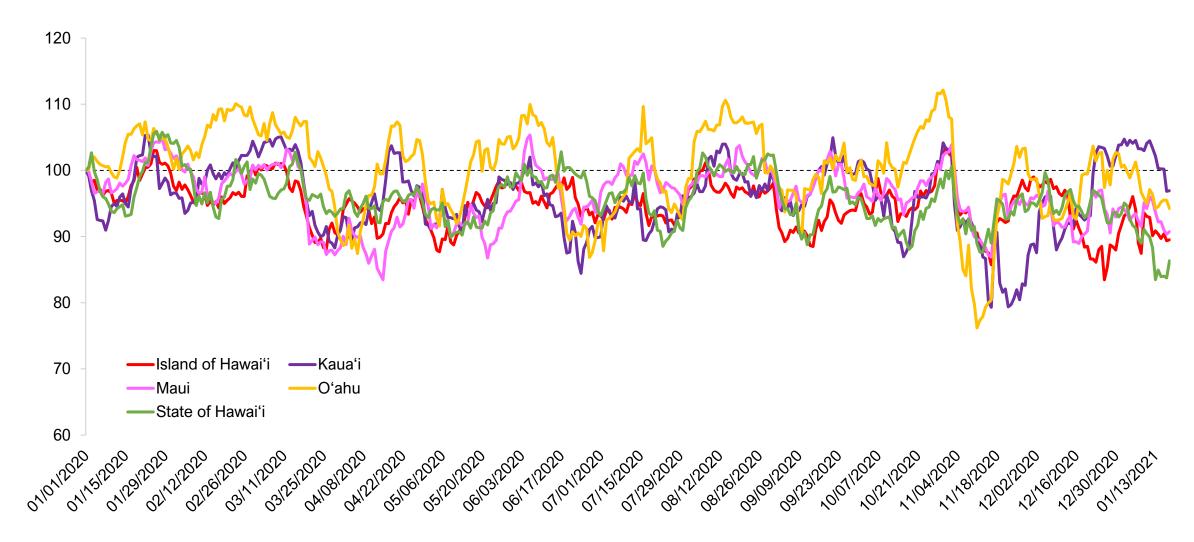
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U.S. Recommend Net Score Two-Week Moving Average



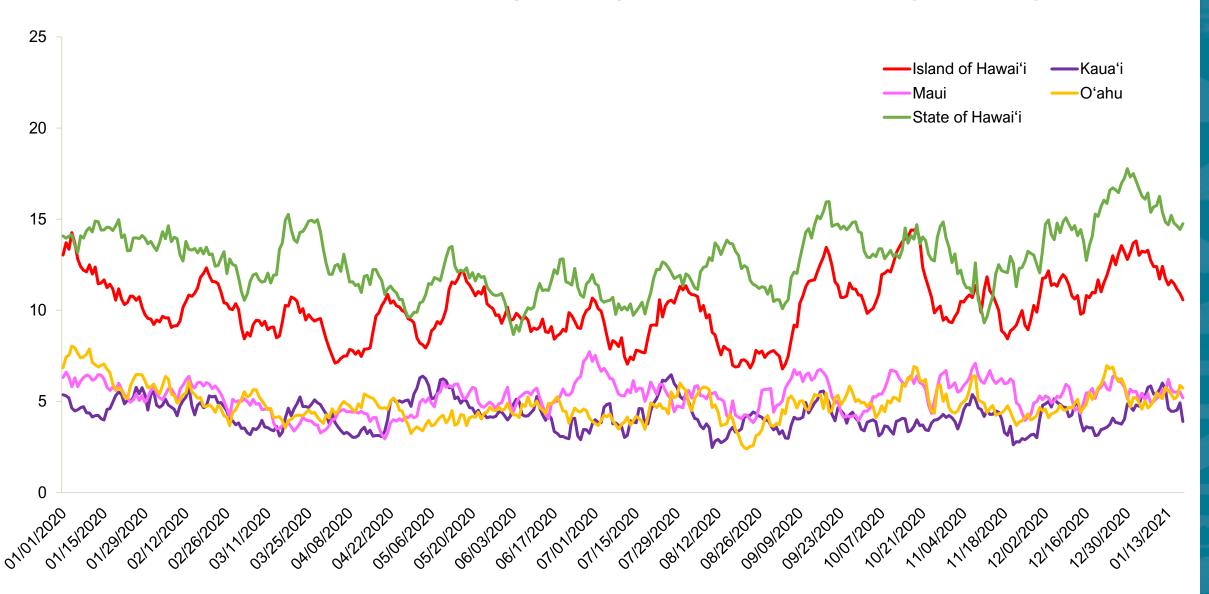
Question: (Net) Which of the following destinations would you RECOMMEND to a friend or colleague? / And which of the following destinations would you tell a friend or colleague to AVOID?

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

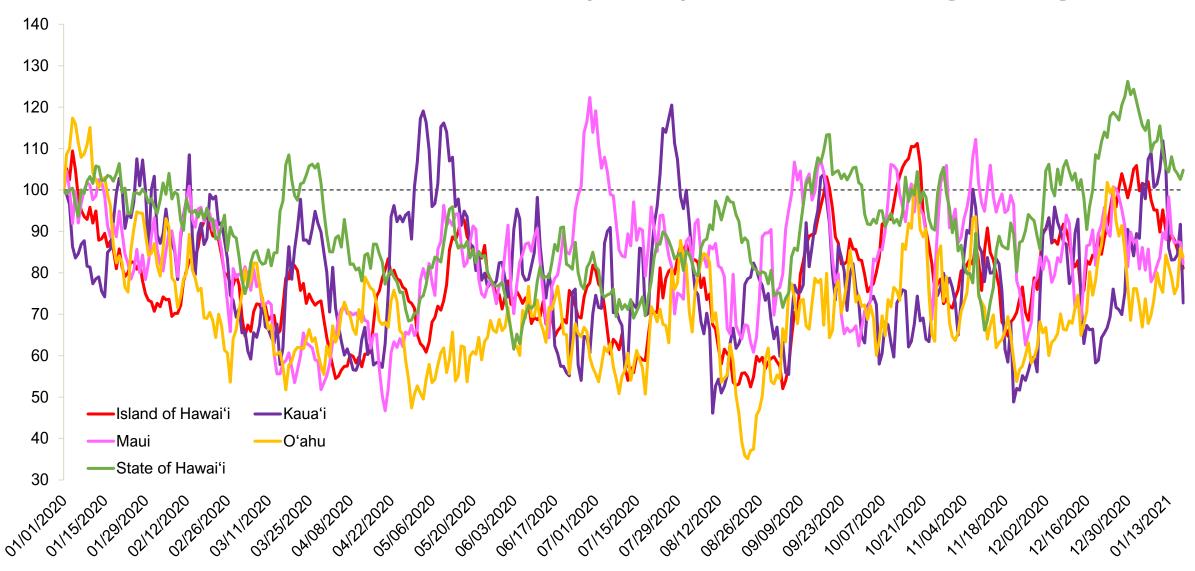


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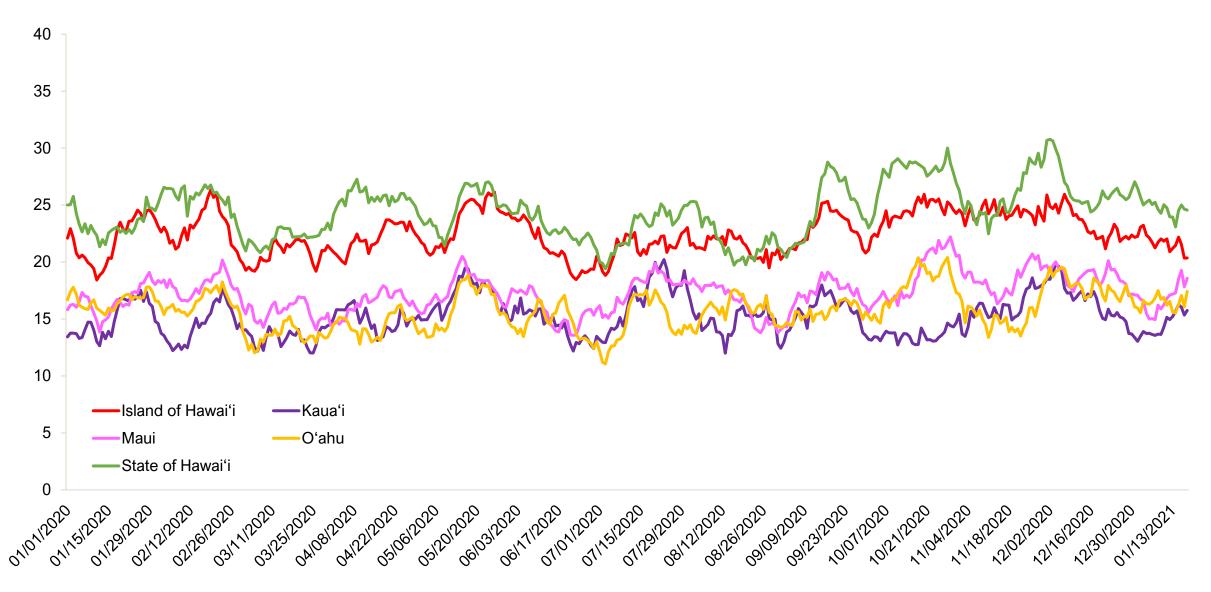
U.S. Word of Mouth Exposure (% Yes) Two-Week Moving Average



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

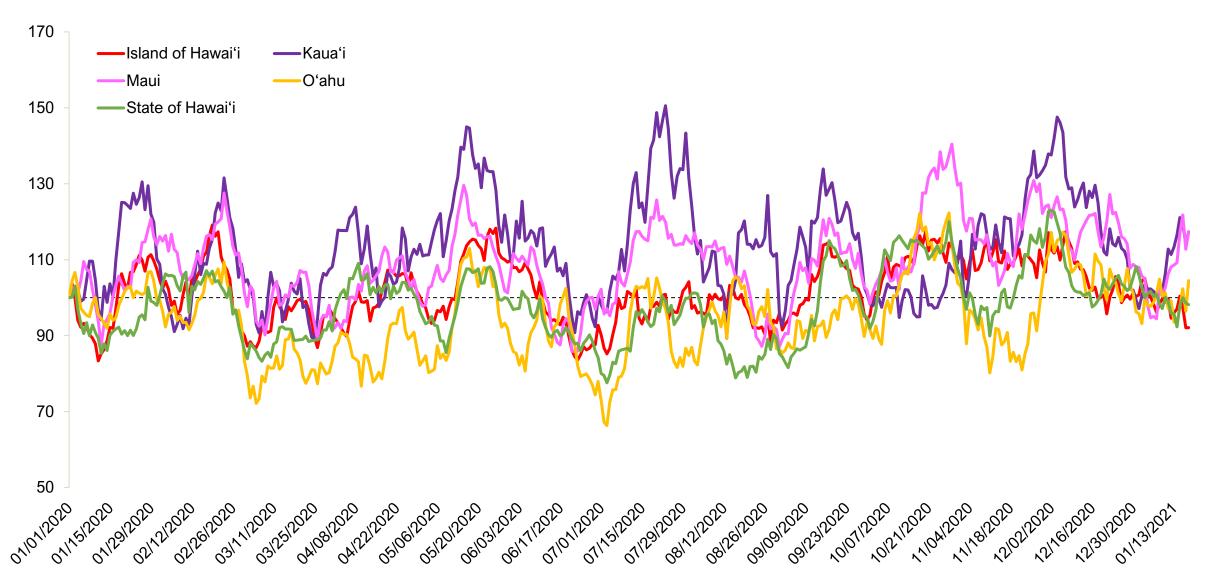


U.S. Consideration (% Yes) Two-Week Moving Average



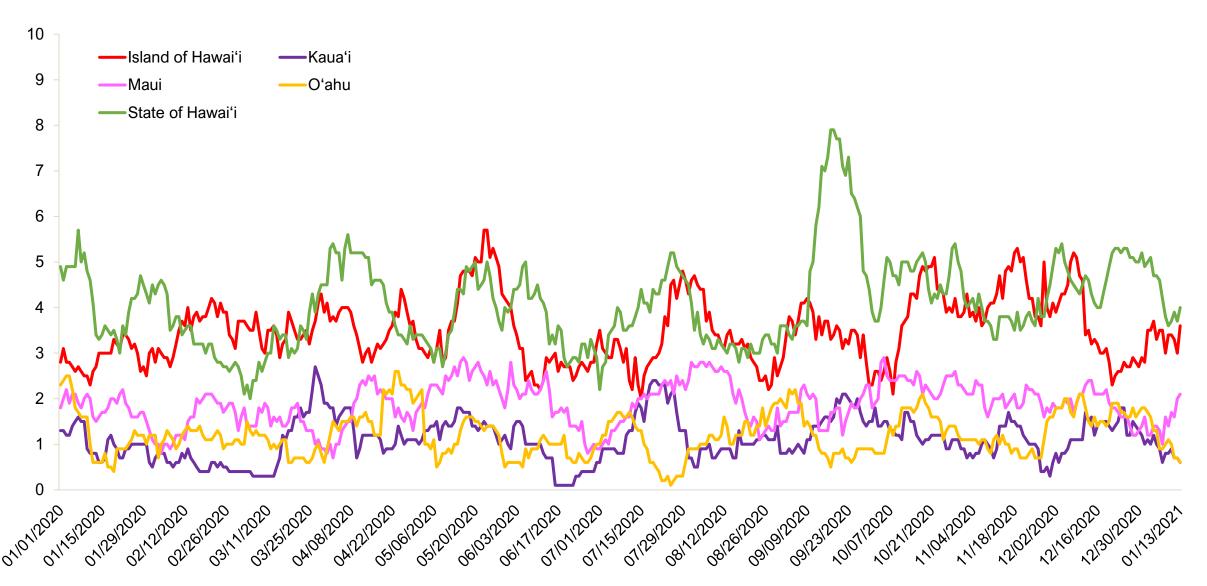
Question: (Net) Thinking about your next vacation by air alone or with friends, family, a partner or spouse, which of the following destinations would you consider?

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



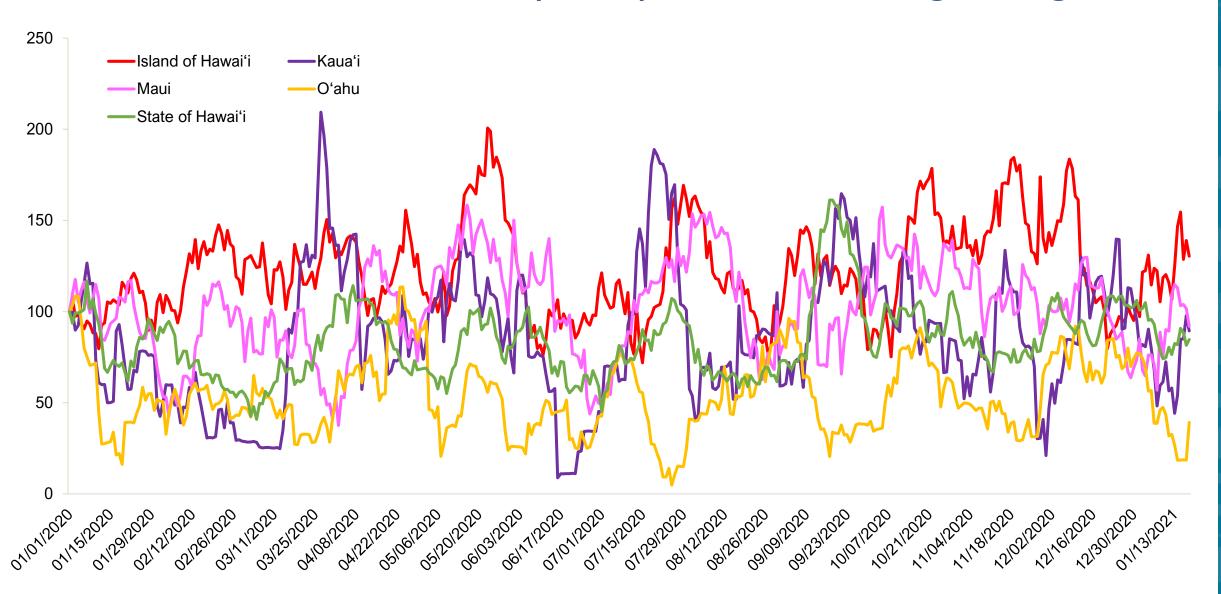
Question: (Net) Thinking about your next vacation by air alone or with friends, family, a partner or spouse, which of the following destinations would you consider?

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



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

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

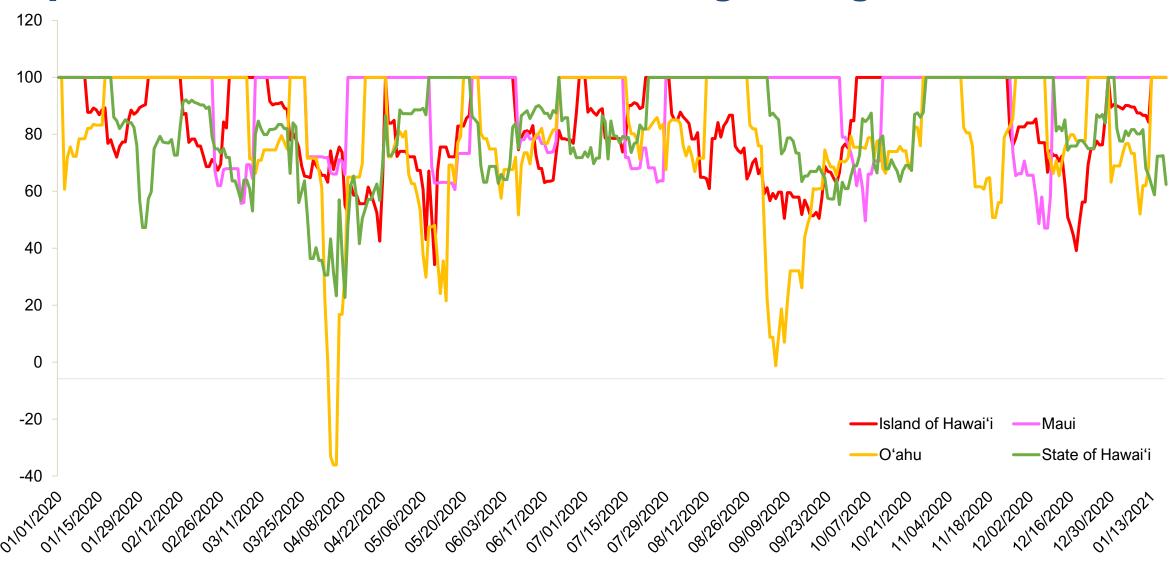


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Japan Destination Index Trends

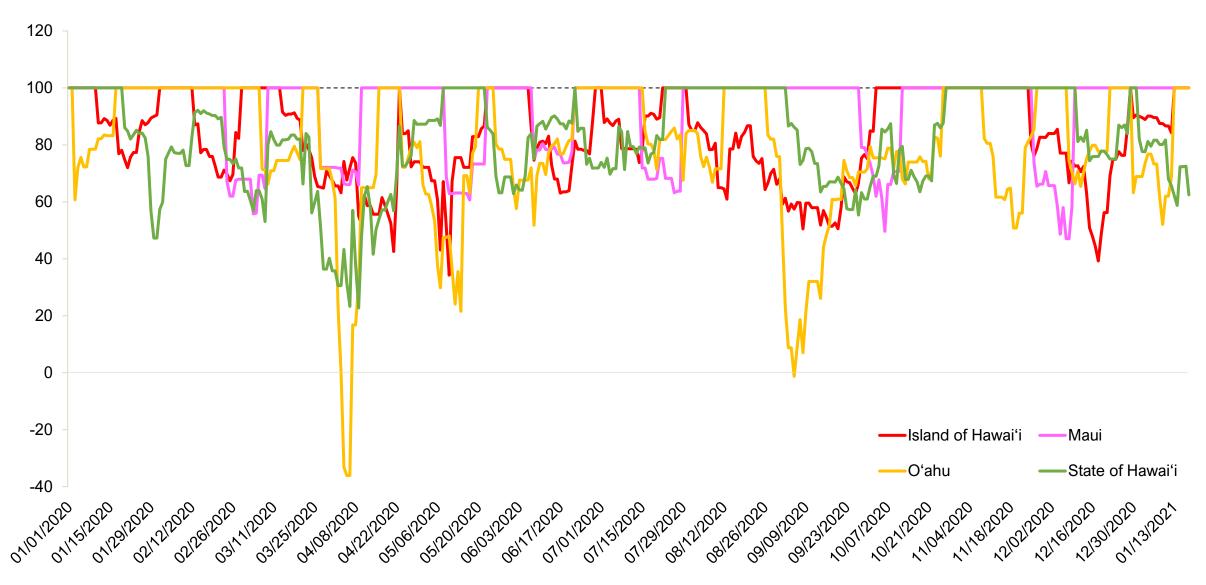


Japan Buzz Net Score Two-Week Moving Average



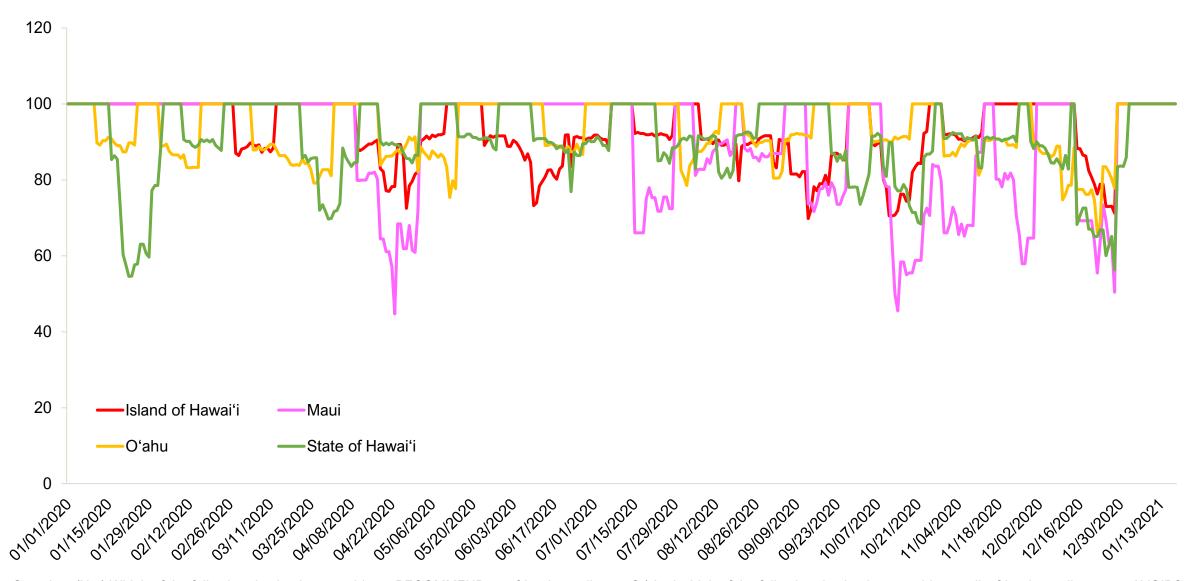
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Index of Japan Buzz Net Score Two-Week Moving Average



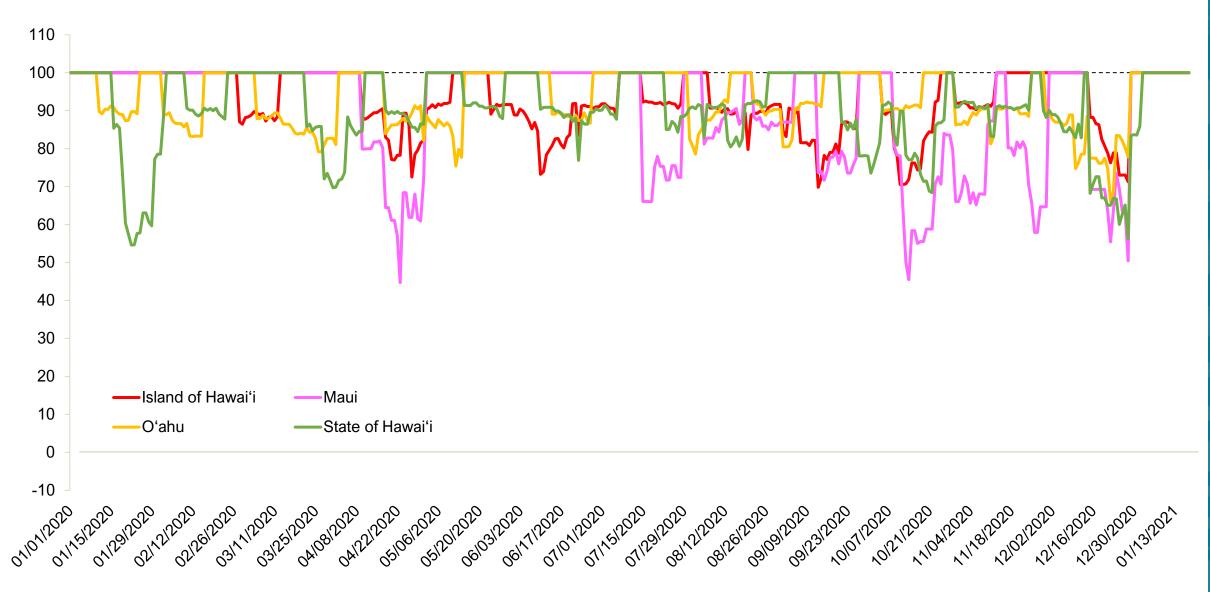
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Japan Recommend Net Score Two-Week Moving Average



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?

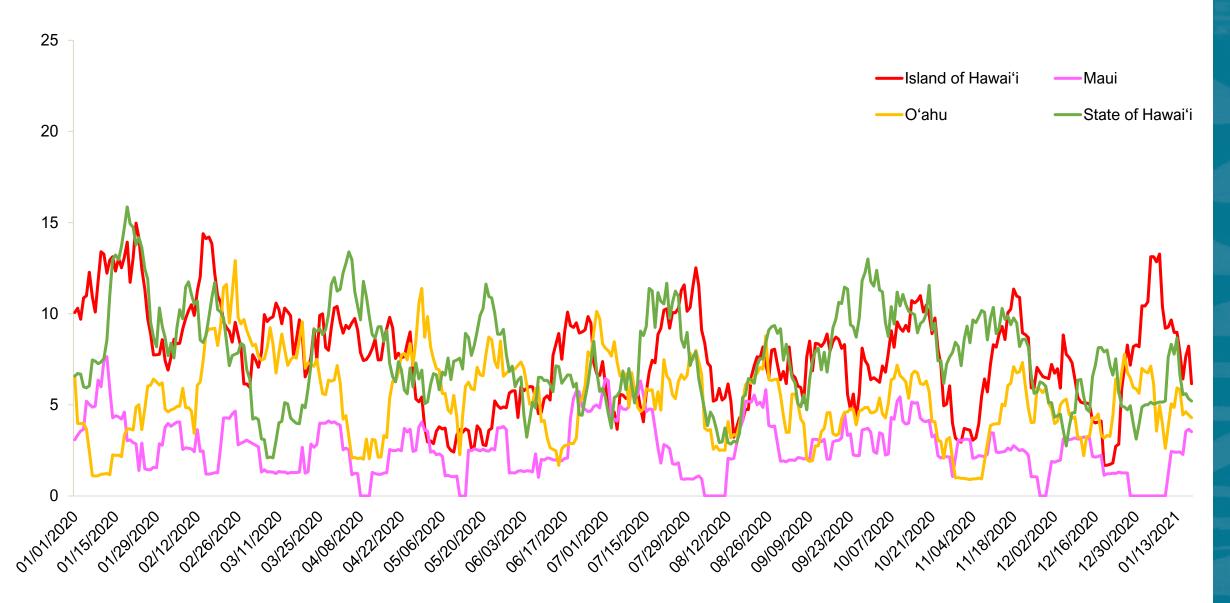
Index of Japan Recommend Net Score Two-Week Moving Average



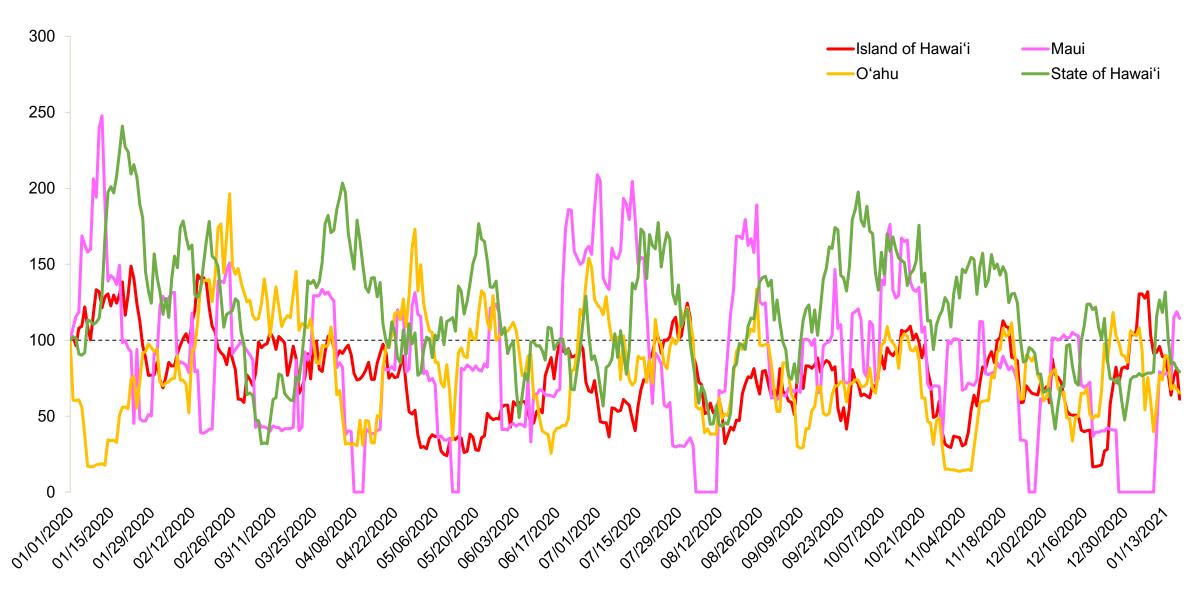
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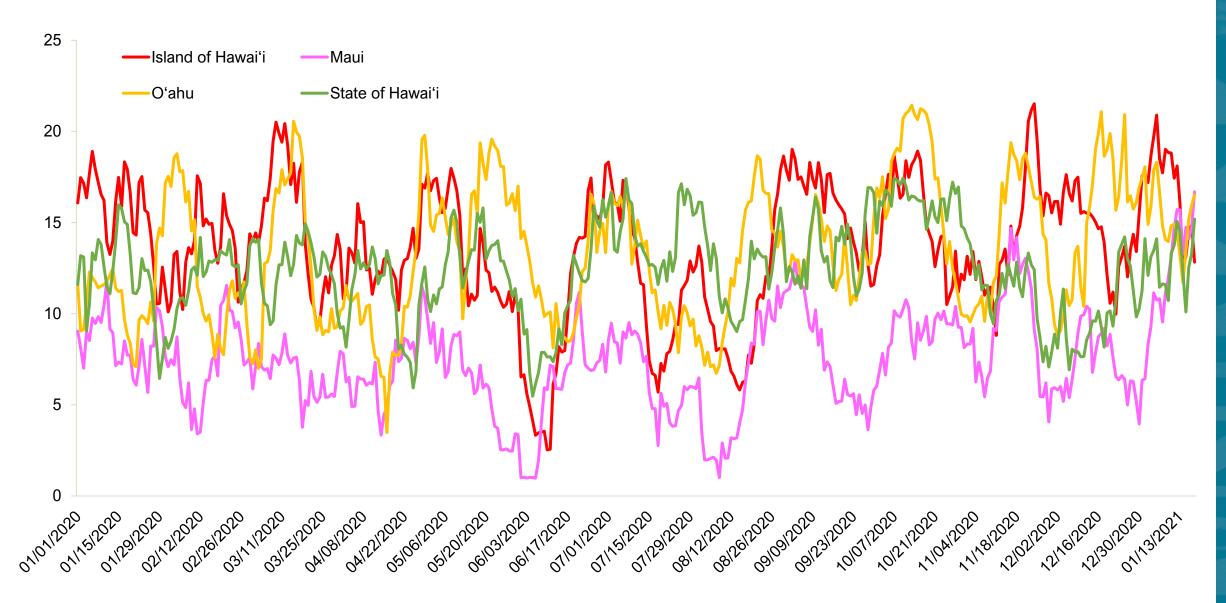
Japan Word of Mouth Exposure (% Yes) Two-Week Moving Average



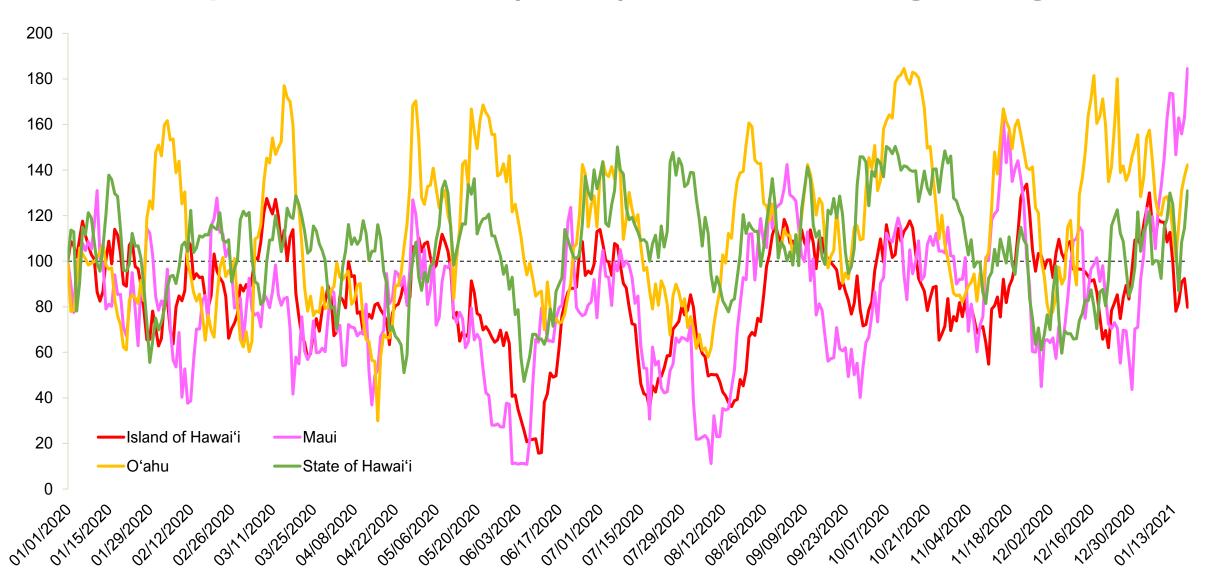
Index of Japan Word of Mouth Exposure (% Yes) Two-Week Moving Average



Japan Consideration (% Yes) Two-Week Moving Average



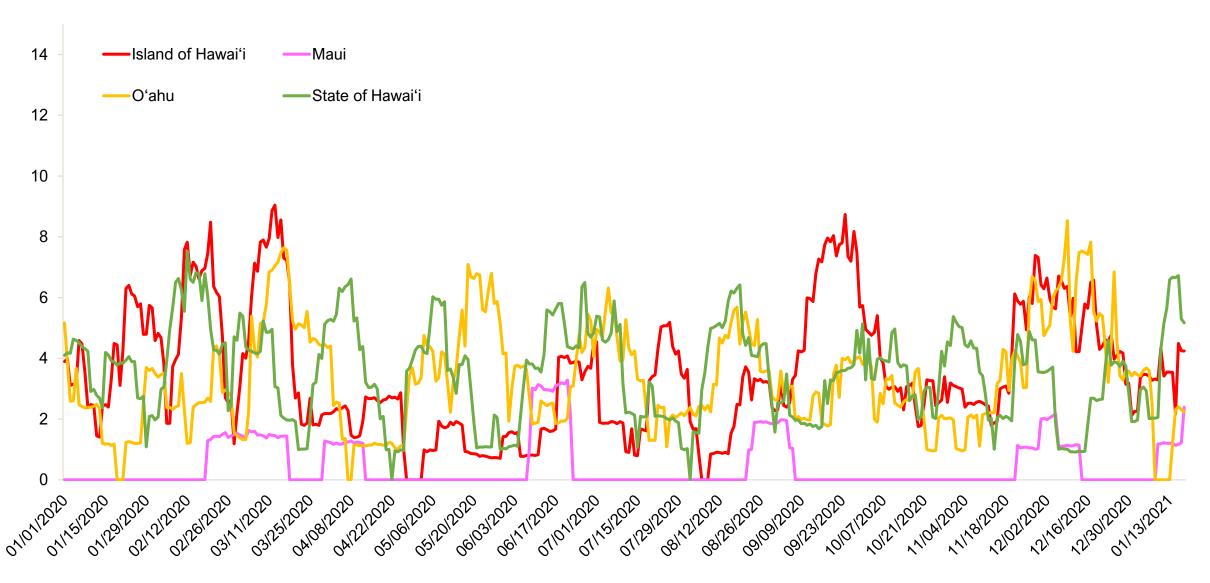
Index of Japan Consideration (% Yes) Two-Week Moving Average



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?

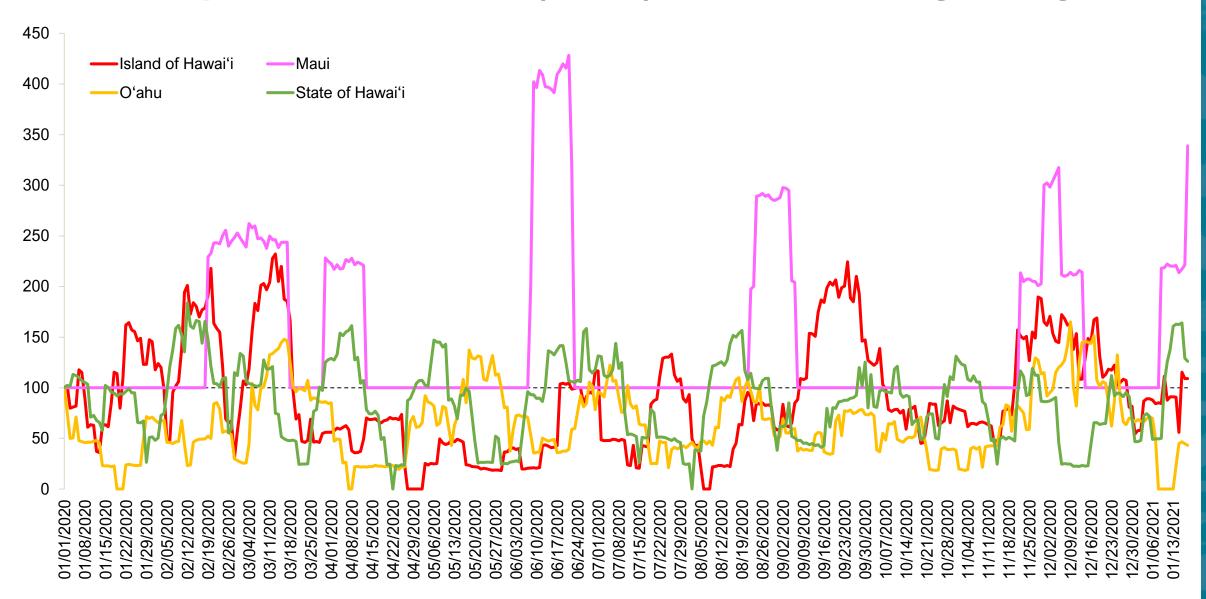
January 19, 2021

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



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

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



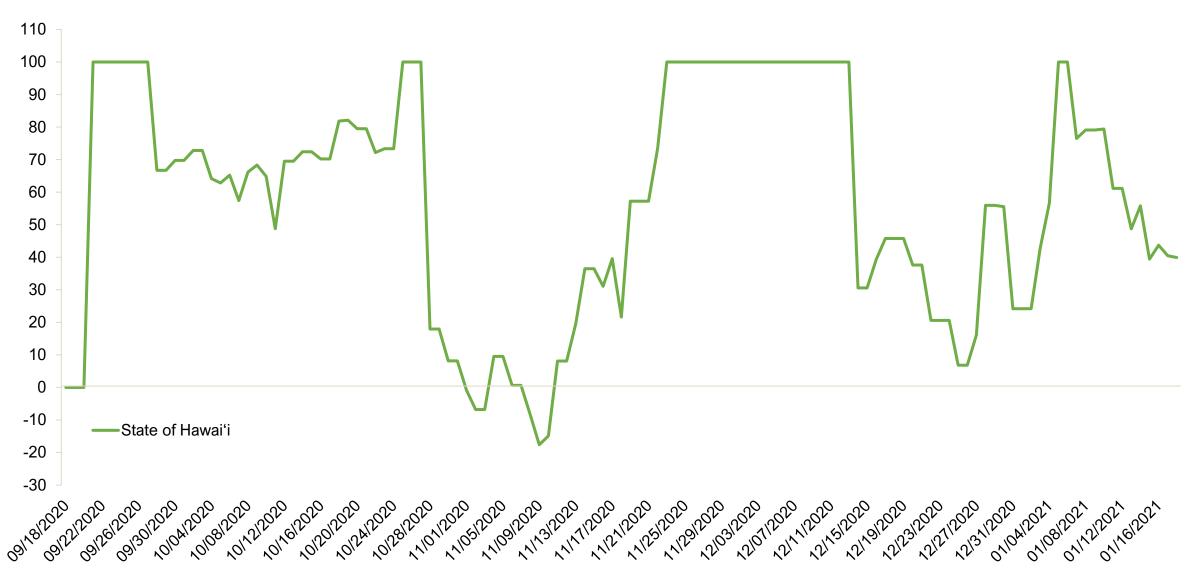
Question: (Net) Of the destinations considered, which are you most likely to visit?

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Canada Destination Index Trends



Canada Buzz Net Score Two-Week Moving Average



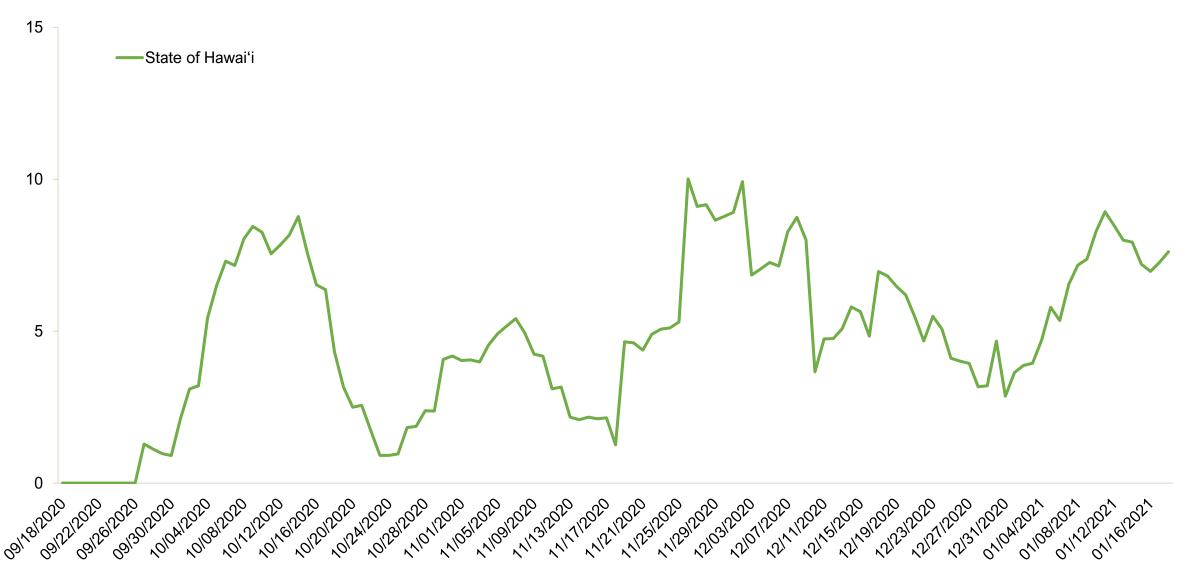
Question: (Net) Over the PAST TWO WEEKS, which of the following destinations have you heard something POSITIVE about (whether in the news, through advertising, or talking to friends and family)? / Now which of the following have you heard something NEGATIVE about over the PAST TWO WEEKS?

Canada 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?

Canada 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?)

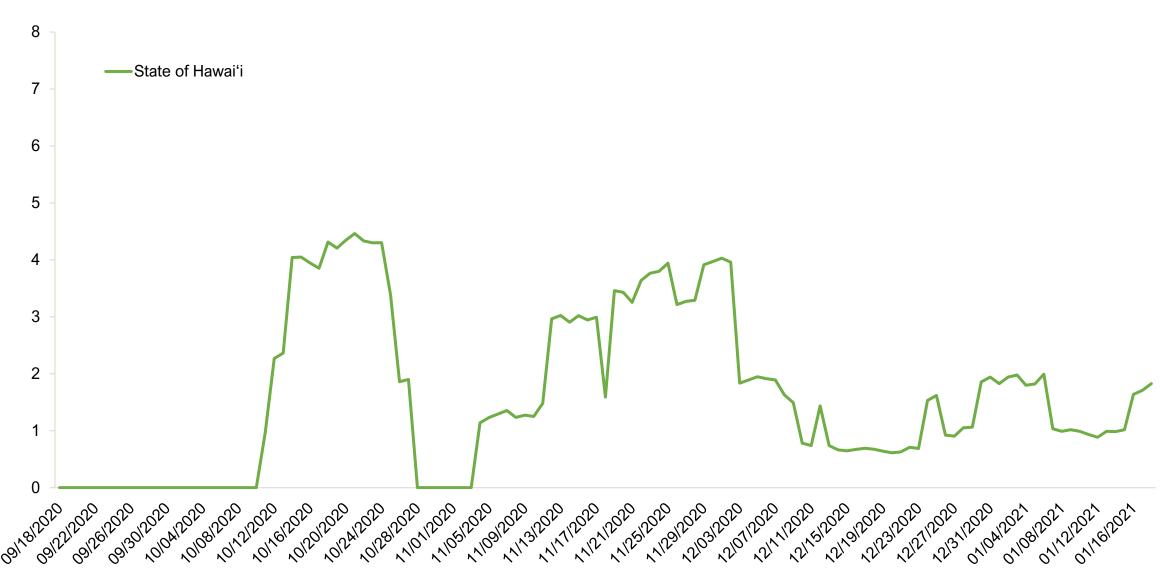
January 19, 2021

Canada 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?

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



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