YouGov Destination Index Trends
Responsible Travelers Segment

March 24, 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 11 million participants in 55 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
- Responsible Traveler Segment
  - Respondents who self-identify as responsible travelers (i.e., wellness focused, environmental impact, culturally minded)
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
## 2020 Significant Dates

<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
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<tbody>
<tr>
<td>March 26, 2020 –</td>
<td>mandated 14-day quarantine for all travelers coming to Hawai‘i goes</td>
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<td></td>
<td>into effect at 12:01 a.m.</td>
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<td>June 24, 2020 –</td>
<td>Gov. Ige announces pre-travel testing program to avoid the mandatory</td>
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<td></td>
<td>quarantine starting Aug. 1st</td>
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<td>July 25-26, 2020 –</td>
<td>Hurricane Douglas passes close to the Hawaiian Islands</td>
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<td>August 6, 2020 –</td>
<td>Gov. Ige announces that interisland travel quarantine will be</td>
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<td></td>
<td>reinstated starting Aug. 11th</td>
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<td>September 16, 2020 –</td>
<td>Gov. Ige announces pre-travel testing program launch pushed to Oct.</td>
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<tr>
<td></td>
<td>15th</td>
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<td>October 15, 2020 –</td>
<td>Gov. Ige announces pre-travel testing program officially begins</td>
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<tr>
<td>November 24, 2020 –</td>
<td>Kaua‘i County announces they will opt out of Safe Travels program</td>
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<td></td>
<td>starting Dec. 2nd</td>
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<tr>
<td>June 16, 2020 –</td>
<td>14-day quarantine requirement for interisland travelers lifted</td>
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<td>July 13, 2020 –</td>
<td>pre-travel testing program launch pushed back to Sept. 1st</td>
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<tr>
<td>July 27, 2020 –</td>
<td>Gov. Ige announces Hawai‘i is being considered by Japan for resumption</td>
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<tr>
<td></td>
<td>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</td>
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<tr>
<td></td>
<td>earliest</td>
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<td>September 16, 2020 –</td>
<td>pre-travel testing program launch pushed to Oct. 15th</td>
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January 12, 2021 – CDC recommends all international arrivals over the age of two get tested within three days before returning to the U.S.

January 26, 2021 – new CDC regulation goes into effect, requiring all international arrivals (2+ years of age) to the U.S. have a negative COVID-19 test within three days of departure to avoid a 10-day quarantine

March 24, 2021 – all arriving passengers to Maui County must upload the AlohaSafe COVID-19 exposure app to their cell phones

March 5, 2021 – Gov. Ige approves Kaua‘i County reentry into Safe Travels Program beginning April 5th
U.S. Destination Index Trends
Responsible Travelers Segment
O‘ahu
Buzz 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?

Word of Mouth Exposure 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 March 23, 2021
O‘ahu – Recommend Net Score, Consideration (% Yes), Purchase Intent (% Yes) U.S. Four-Week Moving Average

Recommend 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?

Consideration 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?

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

Source: YouGov data as of March 23, 2021
U.S. Destination Index Trends
Responsible Travelers Segment
Maui
Maui – Buzz Net Score and Word of Mouth Exposure (% Yes)
U.S. Four-Week Moving Average

Buzz Net Score
Word of Mouth Exposure (% Yes)

Buzz 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?

Word of Mouth Exposure 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 March 23, 2021
Maui – Recommend Net Score, Consideration (% Yes), Purchase Intent (% Yes)
U.S. Four-Week Moving Average

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

Source: YouGov data as of March 23, 2021

March 24, 2021
U.S. Destination Index Trends
Responsible Travelers Segment
Kaua‘i
Kaua‘i – Buzz Net Score and Word of Mouth Exposure (% Yes)
U.S. Four-Week Moving Average

Buzz 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?

Word of Mouth Exposure 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 March 23, 2021
**Recommend 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?

**Consideration 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?

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

Source: YouGov data as of March 23, 2021
U.S. Destination Index Trends
Responsible Travelers Segment
Island of Hawai‘i
Island of Hawai’i – Buzz Net Score and Word of Mouth Exposure (% Yes) U.S. Four-Week Moving Average

**Buzz 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?

**Word of Mouth Exposure 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 March 23, 2021
Island of Hawai‘i – Recommend Net Score, Consideration (% Yes), Purchase Intent (% Yes) U.S. Four-Week Moving Average

Recommend 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?

Consideration 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?

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

Source: YouGov data as of March 23, 2021