YouGov Destination Index Trends

April 5, 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.
<table>
<thead>
<tr>
<th>Date</th>
<th>Event Description</th>
</tr>
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<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>
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<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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<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>announcement that interisland travel quarantine will be reinstated starting Aug. 11th</td>
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<tr>
<td>June 24, 2020</td>
<td>pre-travel testing program launch pushed to Oct. 15th</td>
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<tr>
<td>July 13, 2020</td>
<td>Gov. Ige announces Hawai‘i is being considered by Japan for resumption of international travel</td>
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<tr>
<td>July 27, 2020</td>
<td>pre-travel testing program launch pushed back to Oct. 1st</td>
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<tr>
<td>August 18, 2020</td>
<td>pre-travel testing program officially begins</td>
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<tr>
<td>September 16, 2020</td>
<td>Gov. Ige announces Hawai‘i is being considered by Japan for resumption of international travel</td>
</tr>
<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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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 20, 2021 – all arriving passengers to Maui County must upload the *AlohaSafe* COVID-19 exposure app to their cell phones.

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

March 3, 2021 – Gov. Ige approves Kaua’i’s re-entry into Safe Travels for Trans-Pacific travelers beginning April 5.
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 April 4, 2021
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 April 4, 2021
U.S. Recommend Net Score Two-Week Moving Average

Island of Hawai'i  Kaua'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?

Source: YouGov data as of April 4, 2021

April 5, 2021
Index of U.S. Recommend Net Score Two-Week Moving Average

Source: HVCB analysis of YouGov data as of April 4, 2021

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 April 4, 2021
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 April 4, 2021
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 April 4, 2021
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?

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

Source: YouGov data as of April 4, 2021

April 5, 2021
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 April 4, 2021
Question: (Net) Of the destinations considered, which are you most likely to visit?

Source: YouGov data as of April 4, 2021
Index of U.S. Purchase Intent (% Yes) Two-Week Moving Average

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

Source: YouGov data as of April 4, 2021
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 April 4, 2021
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 April 4, 2021
Japan Word of Mouth Exposure (% Yes) Two-Week Moving Average

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

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 April 4, 2021
Index of Japan Word of Mouth Exposure (% Yes) Two-Week Moving Average

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

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 April 4, 2021
Japan 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?)

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

Source: YouGov data as of April 4, 2021
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 April 4, 2021
Japan Purchase Intent (% Yes) Two-Week Moving Average

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

Source: YouGov data as of April 4, 2021

*Kaua‘i is not included due to low response volume
Question: (Net) Of the destinations considered, which are you most likely to visit?

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

Source: YouGov data as of April 4, 2021
Canada Destination Index Trends
Canada Buzz Net Score Two-Week Moving Average

Source: YouGov data as of April 4, 2021

*Island of Hawai’i data not available until 1/20/2021

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

Kaua‘i  Maui  O‘ahu  Island of Hawai‘i  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?

Source: YouGov data as of April 4, 2021

*Island of Hawai‘i data not available until 1/20/2021
Canada Word of Mouth Exposure (% Yes) Two-Week Moving Average

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

0  5  10  15  20

01/01/2021  01/03/2021  01/05/2021  01/07/2021  01/09/2021  01/11/2021  01/13/2021  01/15/2021  01/17/2021  01/19/2021  01/21/2021  01/23/2021  01/25/2021  01/27/2021  01/29/2021  01/31/2021  02/02/2021  02/04/2021  02/06/2021  02/08/2021  02/10/2021  02/12/2021  02/14/2021  02/16/2021  02/18/2021  02/20/2021  02/22/2021  02/24/2021  02/26/2021  02/28/2021  03/02/2021  03/04/2021  03/06/2021  03/08/2021  03/10/2021  03/12/2021  03/14/2021  03/16/2021  03/18/2021  03/20/2021  03/22/2021  03/24/2021  03/26/2021  03/28/2021  03/30/2021  04/01/2021

Source: YouGov data as of April 4, 2021

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 data not available until 1/20/2021
Canada Consideration (% Yes) Two-Week Moving Average

Kauaʻi  Maui  Oʻahu  Island of Hawaiʻi  State of Hawaiʻi

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?

*Island of Hawaiʻi data not available until 1/20/2021

Source: YouGov data as of April 4, 2021
Canada Purchase Intent (% Yes) Two-Week Moving Average

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

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Source: YouGov data as of April 4, 2021