YouGov Destination Index Trends
Responsible Travelers Segment

April 12, 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 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 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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<td>September 16, 2020</td>
<td>pre-travel testing program launch pushed to Oct. 15th</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>June 16, 2020</td>
<td>14-day quarantine requirement for interisland travelers lifted</td>
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<tr>
<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 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>October 15, 2020</td>
<td>pre-travel testing program officially begins</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

April 12, 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 12th
U.S. Destination Index Trends
Responsible Travelers Segment
O‘ahu
O‘ahu – 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 April 11, 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 April 11, 2021

April 12, 2021
Maui – 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 April 11, 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?
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Source: YouGov data as of April 11, 2021
U.S. Destination Index Trends
Responsible Travelers Segment
Kauaʻi
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?

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Source: YouGov data as of April 11, 2021

April 12, 2021
Kaua‘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 April 11, 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?

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Source: YouGov data as of April 11, 2021
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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?