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

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 July 13, 2020

pre-travel testing program launch pushed back to Sept.

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



2021 Significant Dates

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

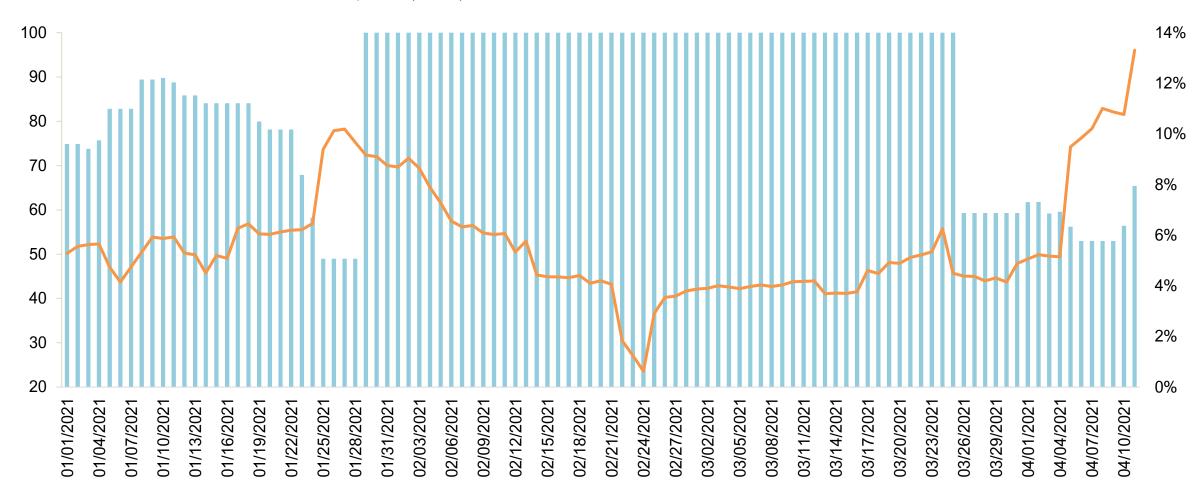


U.S. Destination Index Trends Responsible Travelers Segment O'ahu



O'ahu – Buzz Net Score and Word of Mouth Exposure (% Yes) **U.S. Four-Week Moving Average**

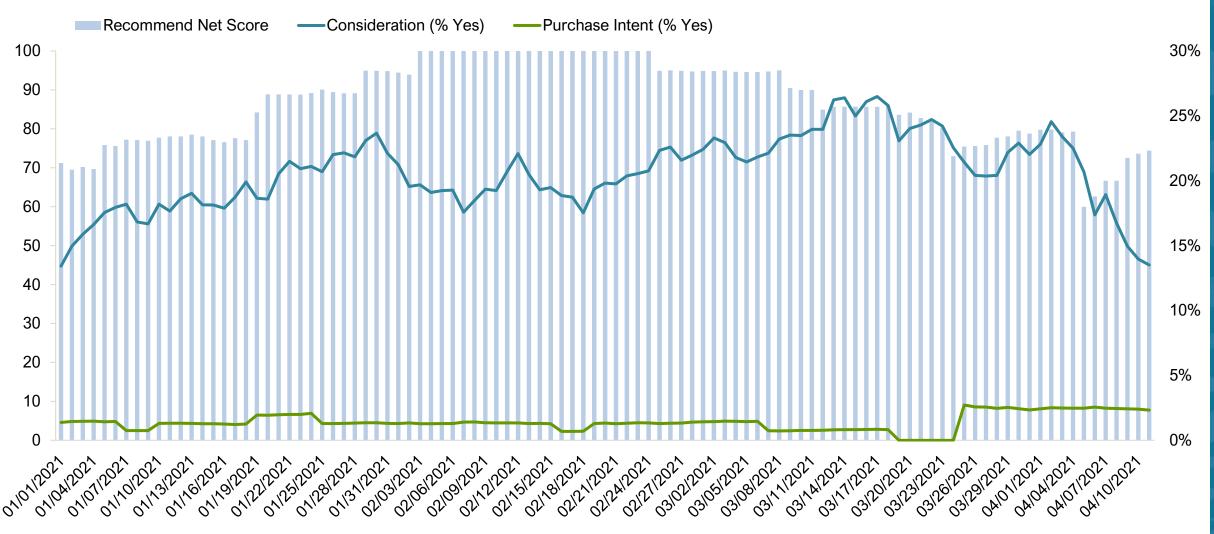
Buzz Net Score -Word of Mouth Exposure (% Yes)



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?)

O'ahu – Recommend Net Score, Consideration (% Yes), Purchase Intent (% Yes) **U.S. Four-Week Moving Average**

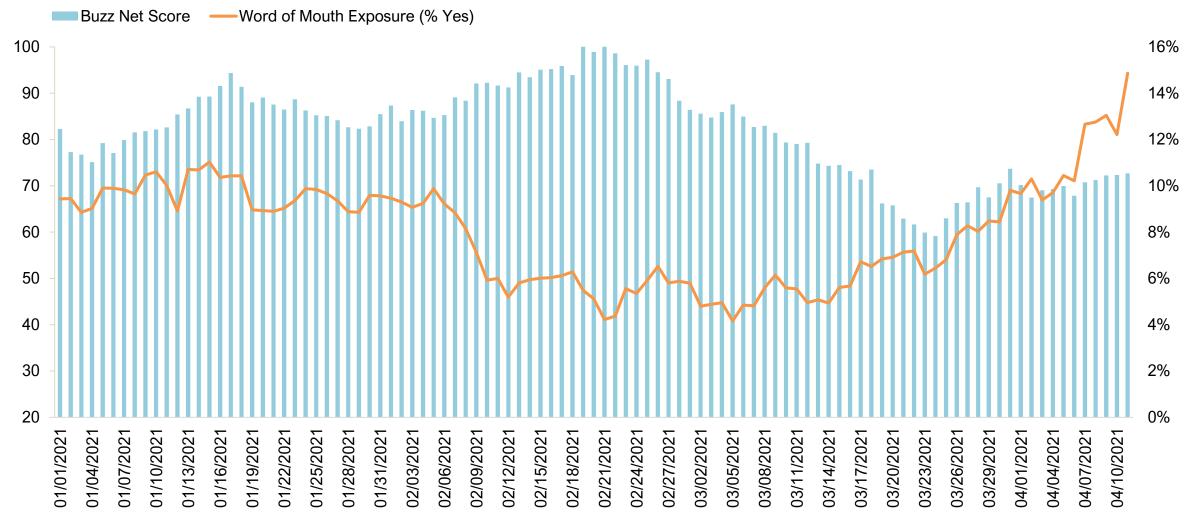


Recommend Question: (Net) Which of the following destinations would you RECOMMEND to a friend or colleague? / And which of the following destinations would you tell a friend or colleague to AVOID? Consideration Question: (Net) Thinking about your next vacation by air alone or with friends, family, a 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?

U.S. Destination Index Trends Responsible Travelers Segment Maui



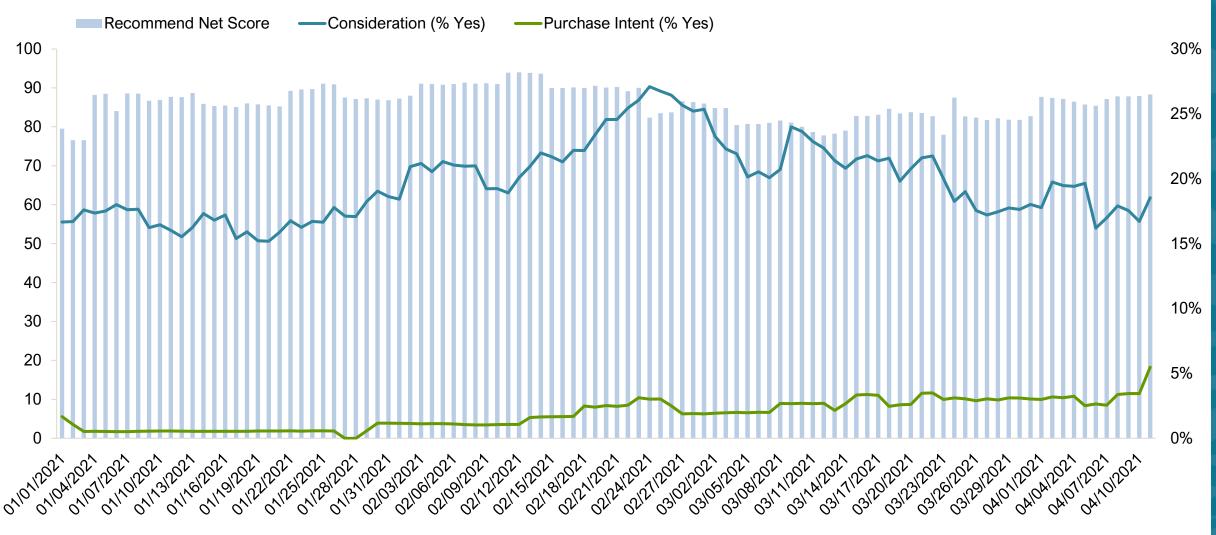
Maui – Buzz Net Score and Word of Mouth Exposure (% Yes) U.S. Four-Week Moving Average



Buzz 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?)

Maui – Recommend Net Score, Consideration (% Yes), Purchase Intent (% Yes) **U.S. Four-Week Moving Average**

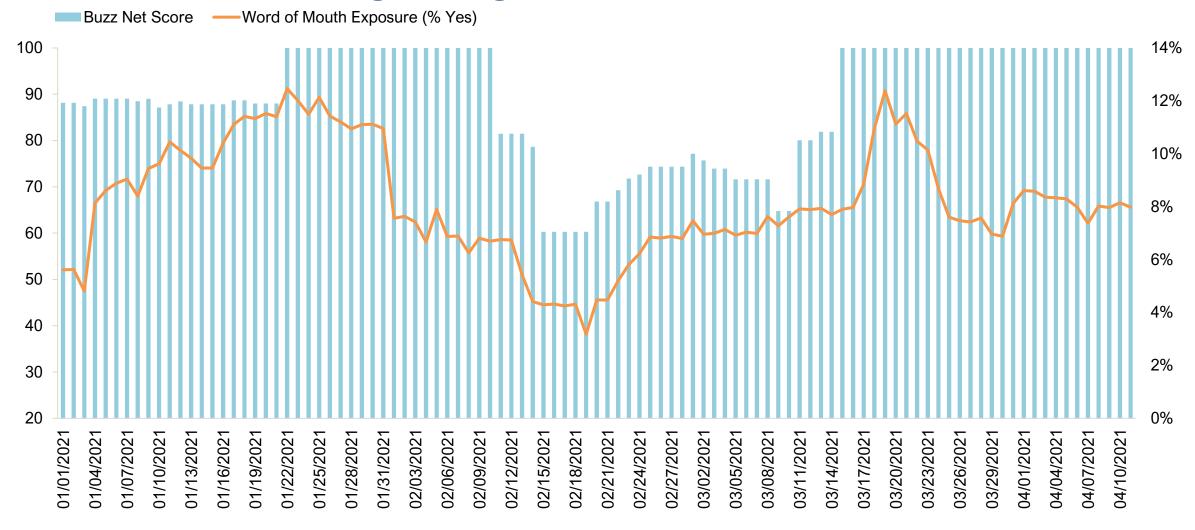


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U.S. Destination Index Trends Responsible Travelers Segment Kaua'i



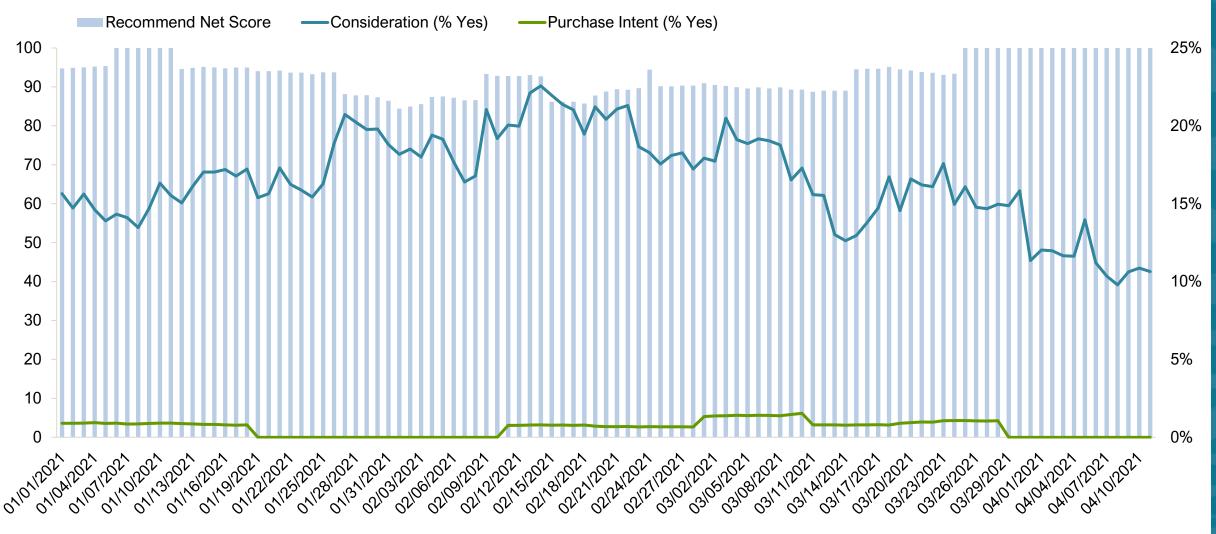
Kaua'i – Buzz Net Score and Word of Mouth Exposure (% Yes) U.S. Four-Week Moving Average



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?)

Kaua'i – Recommend Net Score, Consideration (% Yes), Purchase Intent (% Yes) U.S. Four-Week Moving Average

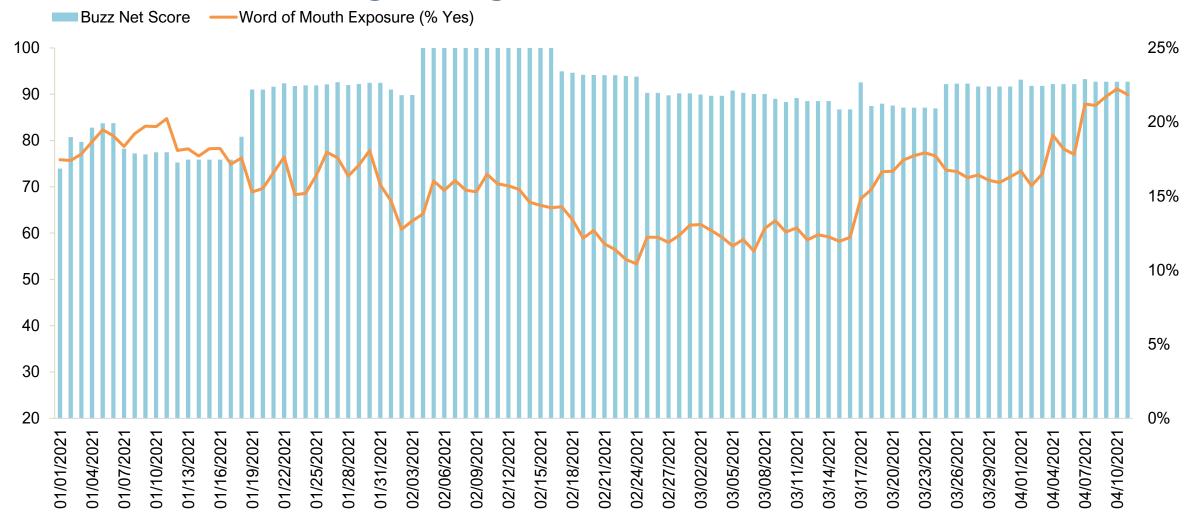


Recommend Question: (Net) Which of the following destinations would you RECOMMEND to a friend or colleague? / And which of the following destinations would you tell a friend or colleague to AVOID? **Consideration Question**: (Net) Thinking about your next vacation by air alone or with friends, family, 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?

U.S. Destination Index Trends Responsible Travelers Segment Island of Hawaii



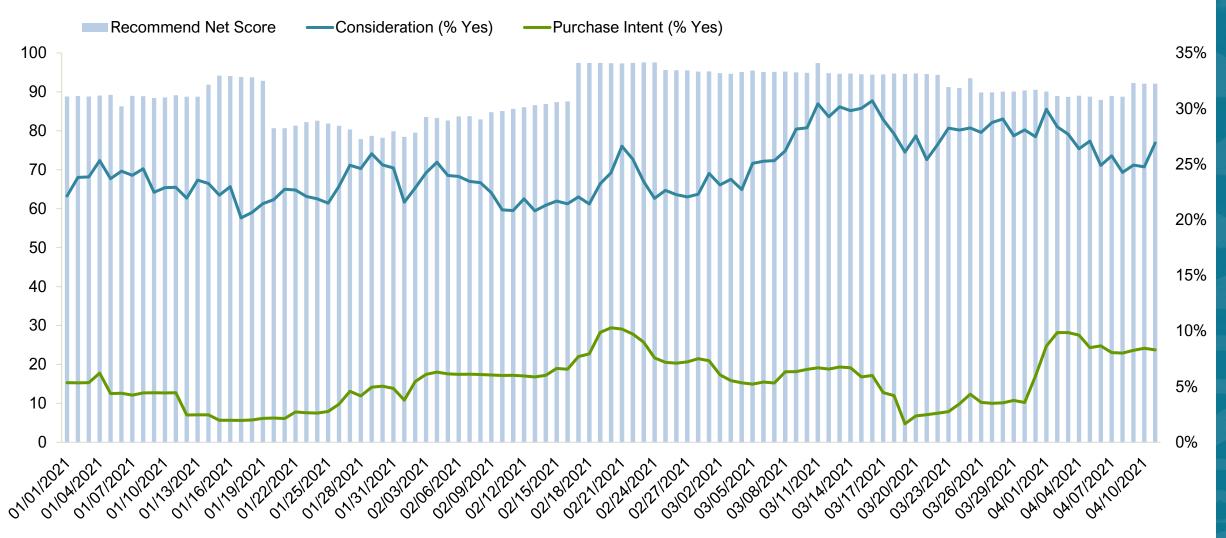
Island of Hawai'i – Buzz Net Score and Word of Mouth Exposure (% Yes) U.S. Four-Week Moving Average



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?)

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?