YouGov Destination Index Trends

June 1, 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>
</thead>
<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>annoucement 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>October 15, 2020</td>
<td>pre-travel testing program officially begins</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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<tr>
<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>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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**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 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 June 1
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?
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 May 31, 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: YouGov data as of May 31, 2021
Index of 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?

Source: HVCB analysis of YouGov data as of May 31, 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?)

Source: YouGov data as of May 31, 2021
Index of U.S. Word of Mouth Exposure (% Yes) Two-Week Moving Average

Source: YouGov data as of May 31, 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?)

June 1, 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?
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 May 31, 2021
Question: (Net) Of the destinations considered, which are you most likely to visit?

Source: YouGov data as of May 31, 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 May 31, 2021

June 1, 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?

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

Source: YouGov data as of May 31, 2021

June 1, 2021
Index of Japan 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?

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

Source: YouGov data as of May 31, 2021
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?

Source: YouGov data as of May 31, 2021

*Kaua'i is not included due to low response volume
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?

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Source: YouGov data as of May 31, 2021
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*Kaua'i is not included due to low response volume

Source: YouGov data as of May 31, 2021
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?

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

Source: YouGov data as of May 31, 2021
Japan Purchase Intent (% Yes) Two-Week Moving Average

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**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 May 31, 2021

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

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 May 31, 2021
Canada Destination Index Trends
Canada Buzz Net Score Two-Week Moving Average

-10 0 10 20 30 40 50 60 70 80 90 100 110

State of Hawai‘i  Kaua‘i  Maui  O‘ahu

01/01/2021 01/08/2021 01/15/2021 01/22/2021 01/29/2021 02/05/2021 02/12/2021 02/19/2021 02/26/2021 03/05/2021 03/12/2021 03/19/2021 03/26/2021 04/02/2021 04/09/2021 04/16/2021 04/23/2021 04/30/2021 05/07/2021 05/14/2021 05/21/2021 05/28/2021

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?

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

Source: YouGov data as of May 31, 2021
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?

Source: YouGov data as of May 31, 2021

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

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

Source: YouGov data as of May 31, 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?

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