YouGov Destination Index Trends

October 11, 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.
2020 Significant Dates

March 26, 2020 – mandated 14-day quarantine for all travelers coming to Hawai’i goes into effect at 12:01 a.m.

June 24, 2020 – Gov. Ige announces pre-travel testing program to avoid the mandatory quarantine starting Aug. 1st

September 6-26, 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. 19th

November 24, 2020 – Kaua’i County announces they will opt out of Safe Travels program starting Dec. 2nd

July 13, 2020 – pre-travel testing program launch pushed back to Sept. 1st

July 27, 2020 – Gov. Ige announces Hawai’i is being considered by Japan for resumption of international travel

September 68, 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 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

June 4, 2021 – Gov. Ige announces that starting June 15, all restrictions for inter-county travel will be lifted and travelers entering the state who have been vaccinated in Hawai‘i may bypass quarantine without a pre-travel test.

March 3, 2021 – Gov. Ige approves Kaua‘i’s re-entry into Safe Travels for Trans-Pacific travelers beginning April 5

June 24, 2021 – Gov. Ige announces that individuals vaccinated in the U.S. will be able to bypass the testing/quarantine requirement with proof of vaccination through the state’s Safe Travels program

August 23, 2021 – Gov. Ige announces “Now’s not a good time to visit Hawai‘i.”
U.S. Destination Index Trends
U.S. 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?

Source: YouGov data as of September 6, 2021

September 7, 2021
Index of U.S. 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?

Source: YouGov data as of September 6, 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 September 6, 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 September 6, 2021

September 7, 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 September 6, 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 September 6, 2021

September 7, 2021
U.S. Consideration (% Yes) Two-Week Moving Average

Source: YouGov data as of September 6, 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
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 September 6, 2021
Question: (Net) Of the destinations considered, which are you most likely to visit?

Source: YouGov data as of September 6, 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 September 6, 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 September 6, 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 September 6, 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?

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

Source: YouGov data as of September 6, 2021
Index of 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?

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

Source: YouGov data as of September 6, 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 September 6, 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?)

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Source: YouGov data as of September 6, 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 September 6, 2021
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 September 6, 2021
**Index of Japan Purchase Intent (% Yes) Two-Week Moving Average**

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

**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 September 6, 2021
Canada Destination Index Trends
Canada Buzz Net Score Two-Week Moving Average

*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

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?

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

Source: YouGov data as of September 6, 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 September 6, 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 data not available until 1/20/2021*
Question: (Net) Of the destinations considered, which are you most likely to visit?

Source: YouGov data as of September 6, 2021

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