

YouGov Destination Index Trends

May 4, 2020



YouGov Syndicated Survey

- HTA subscribes to YouGov's BrandIndex and Profiles databases for US, Japan, and Australia
- 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

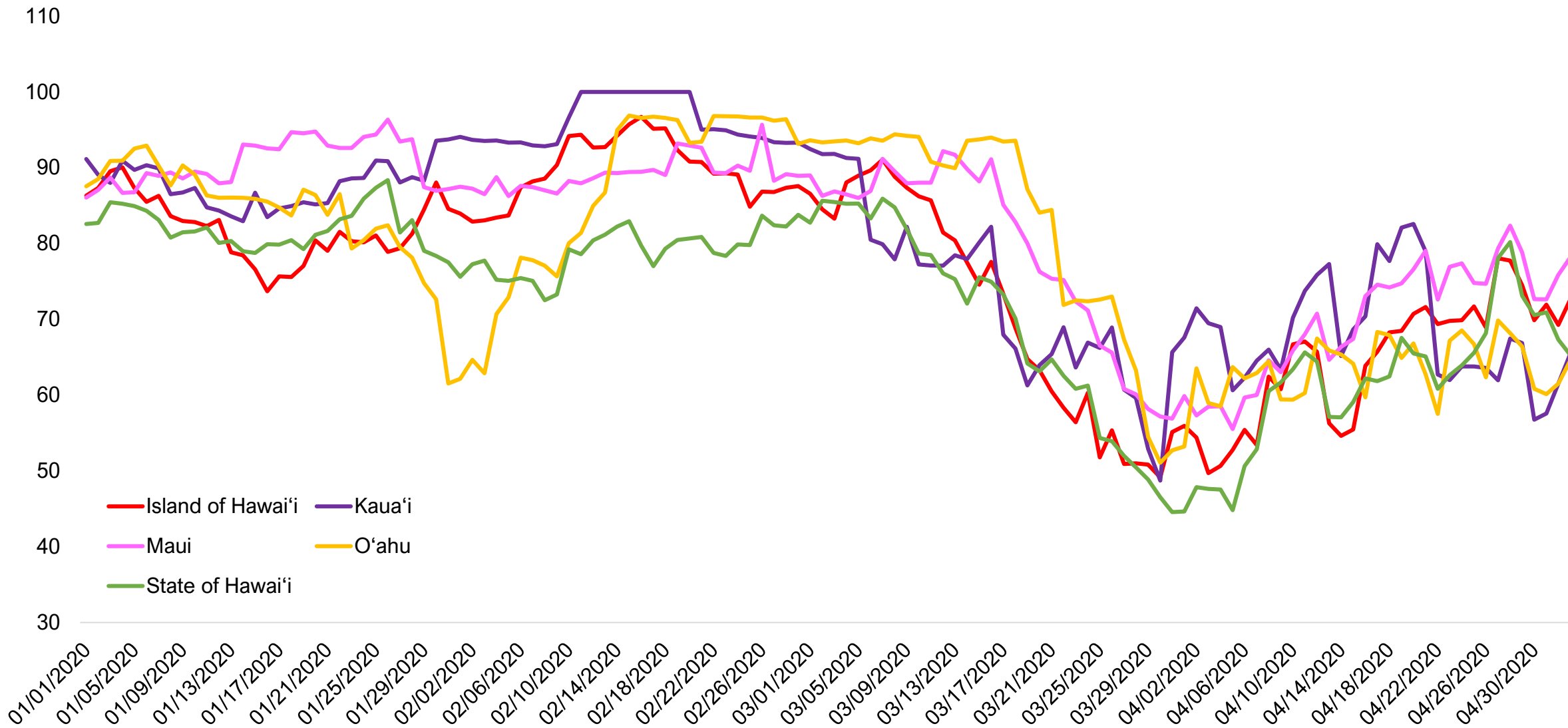
Destination Index

- 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

U.S. Destination Index Trends

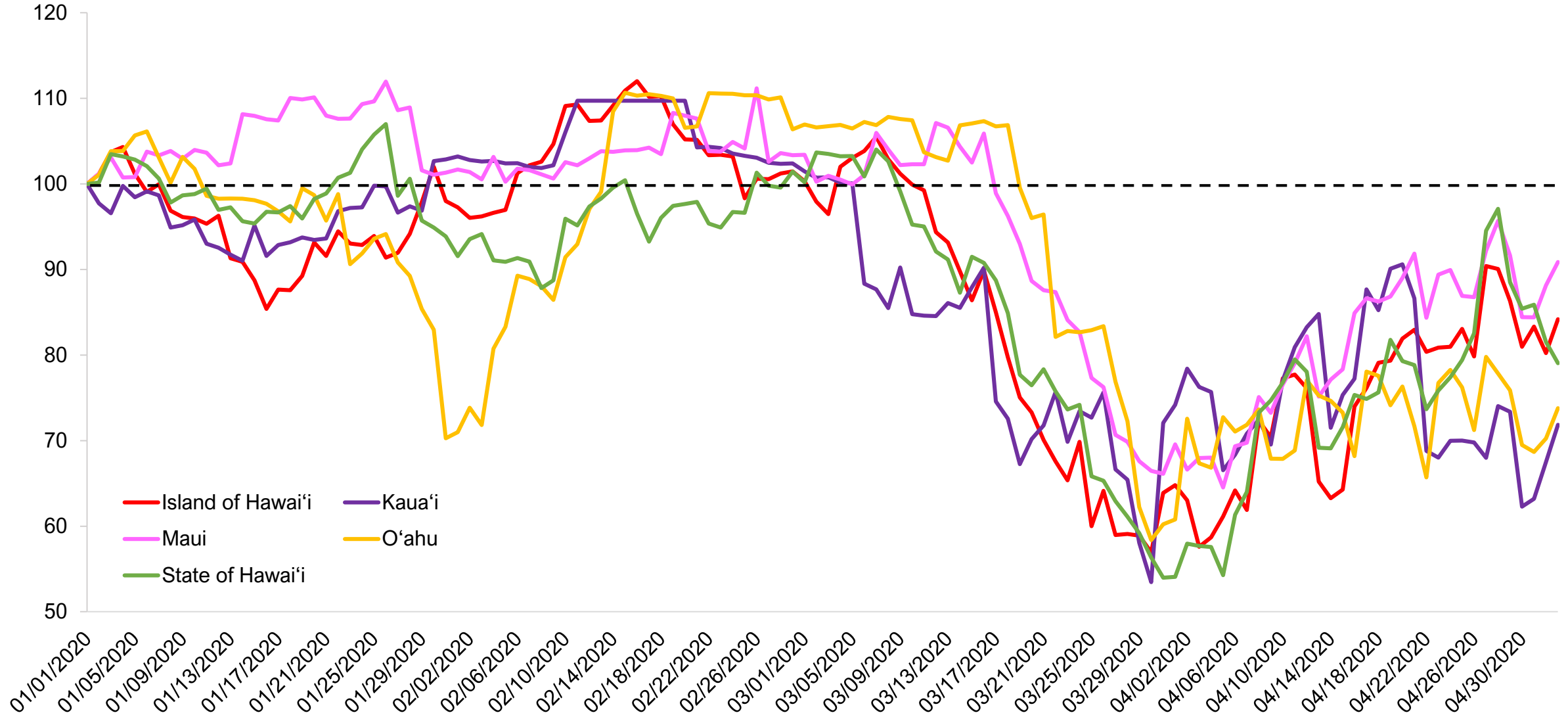


U.S. Buzz Net Score Two-Week Moving Average



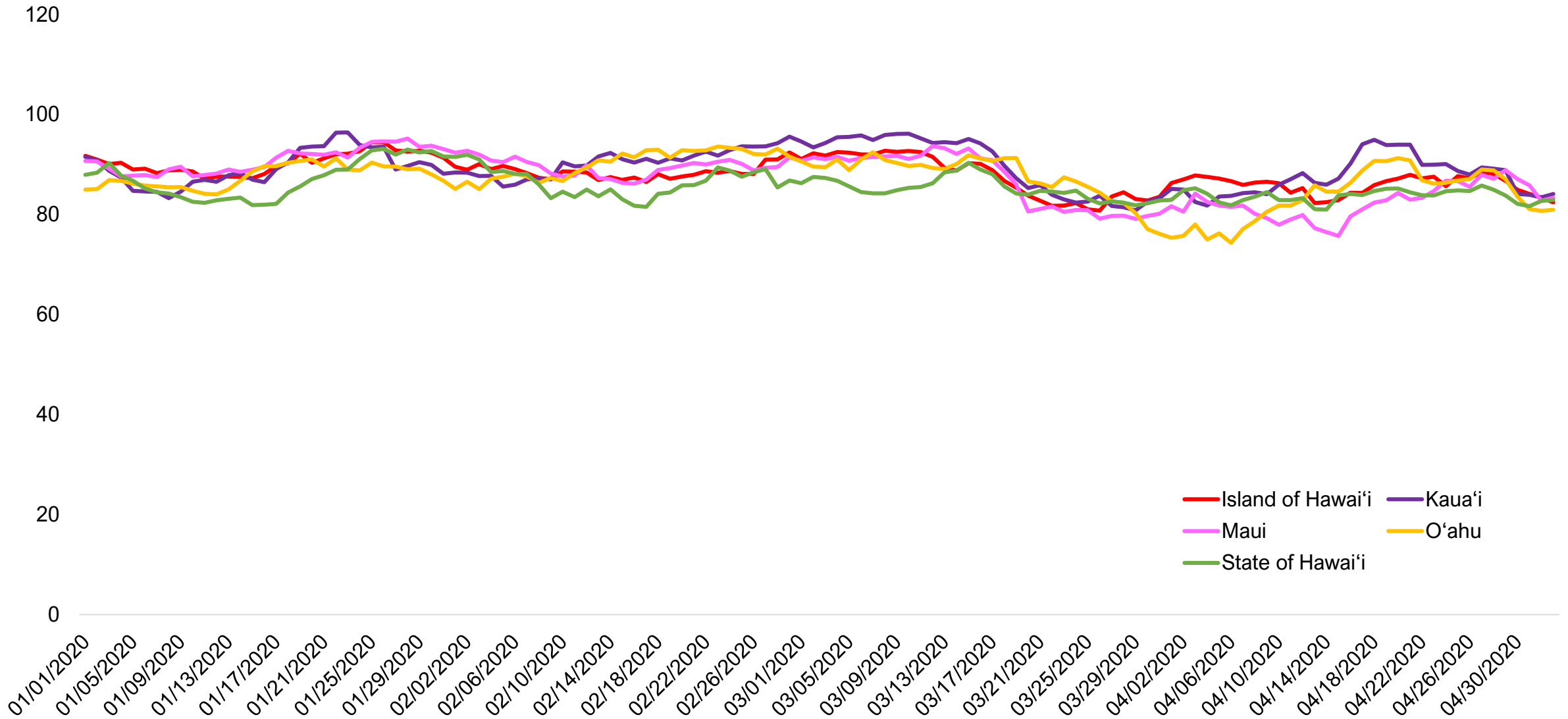
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Index of U.S. Buzz Net Score Two-Week Moving Average



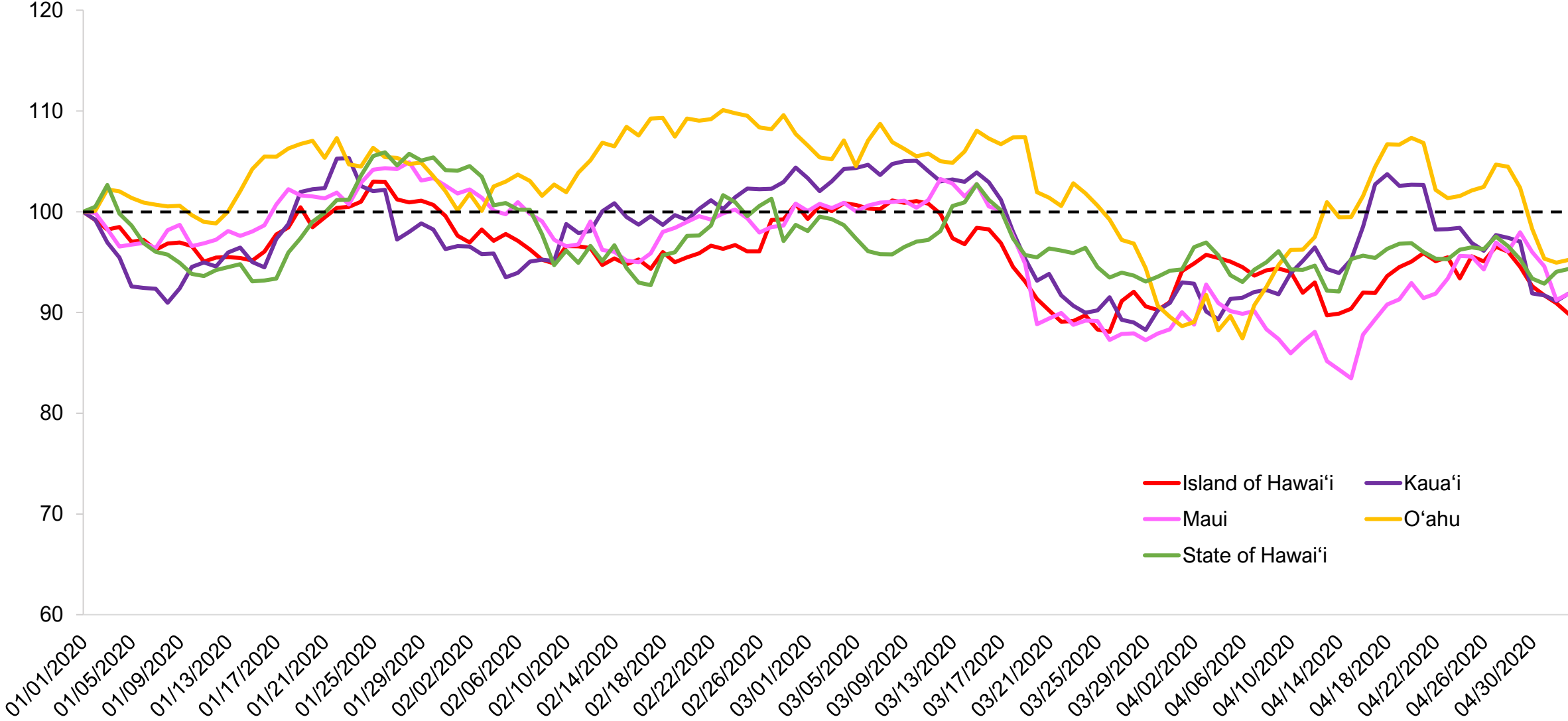
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U.S. Recommend Net Score Two-Week Moving Average



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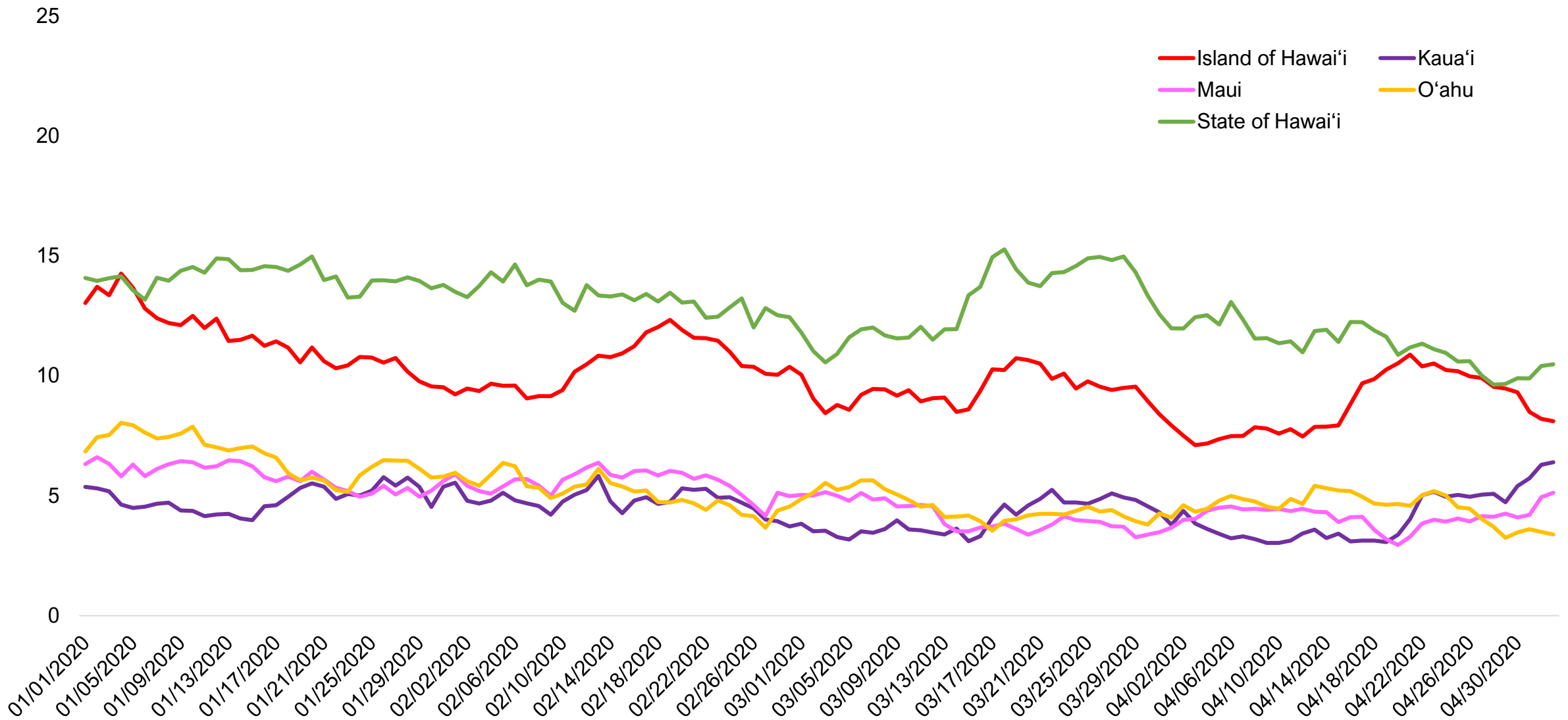
Index of U.S. Recommend Net Score Two-Week Moving Average



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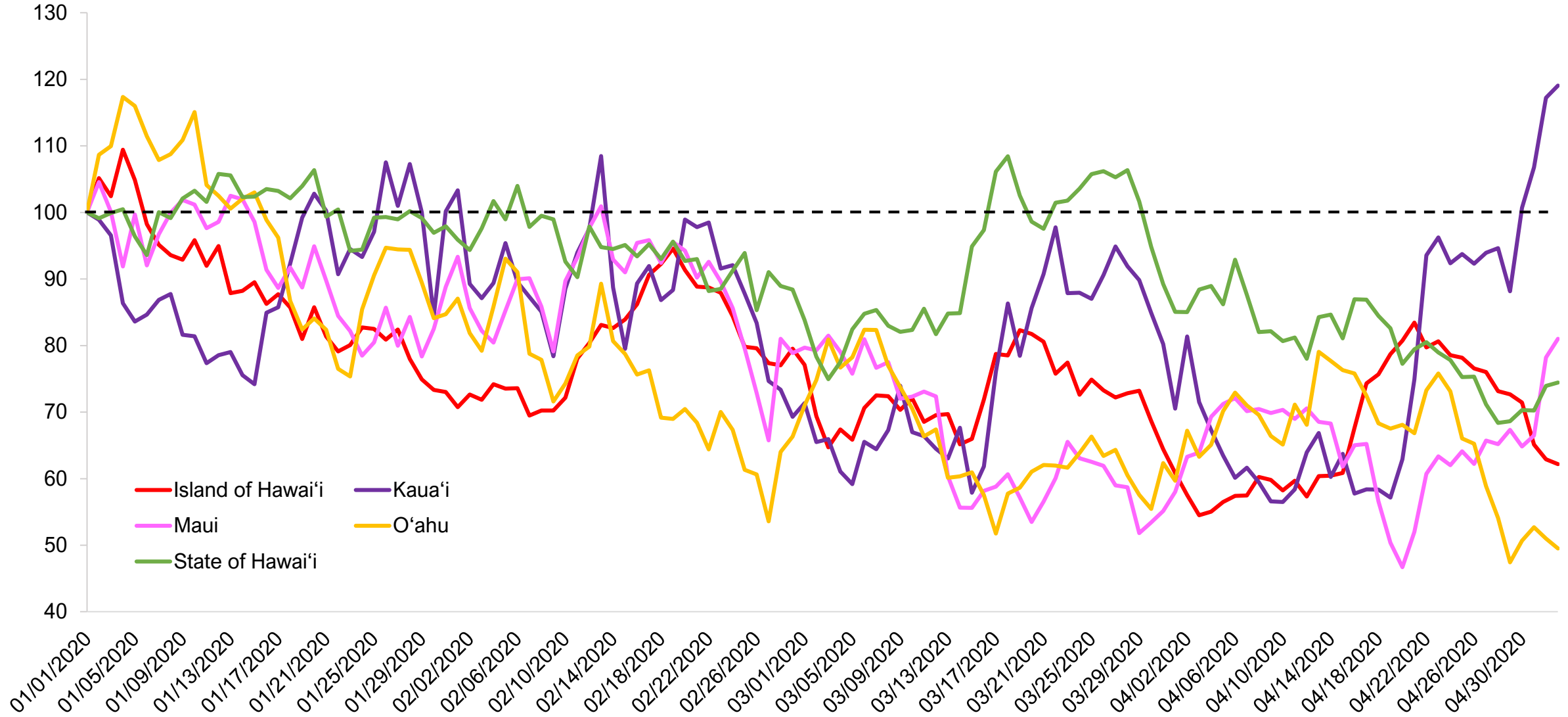
Source: HVCB analysis of YouGov data as of May 3, 2020

U.S. Word of Mouth Exposure (% Yes) Two-Week Moving Average



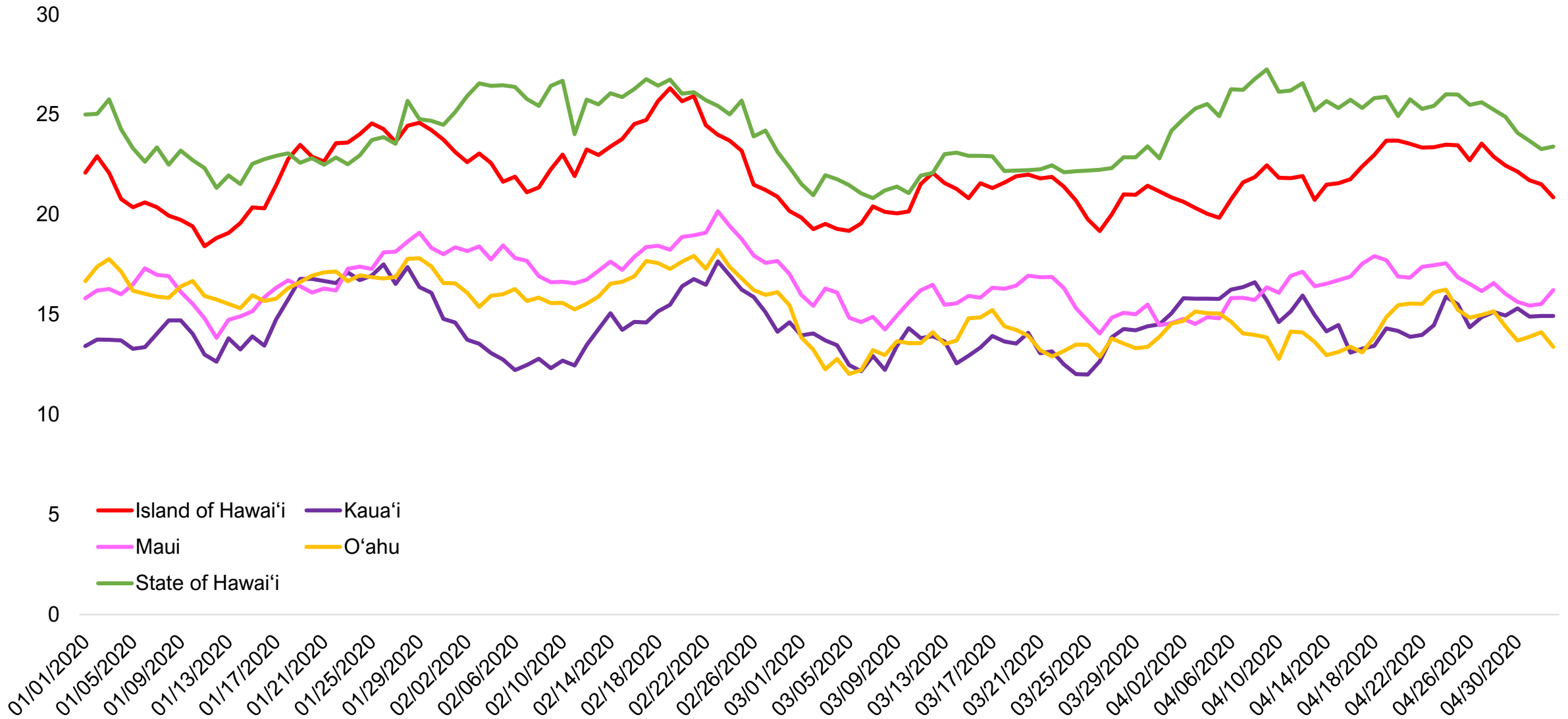
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Index of U.S. Word of Mouth Exposure (% Yes) Two-Week Moving Average



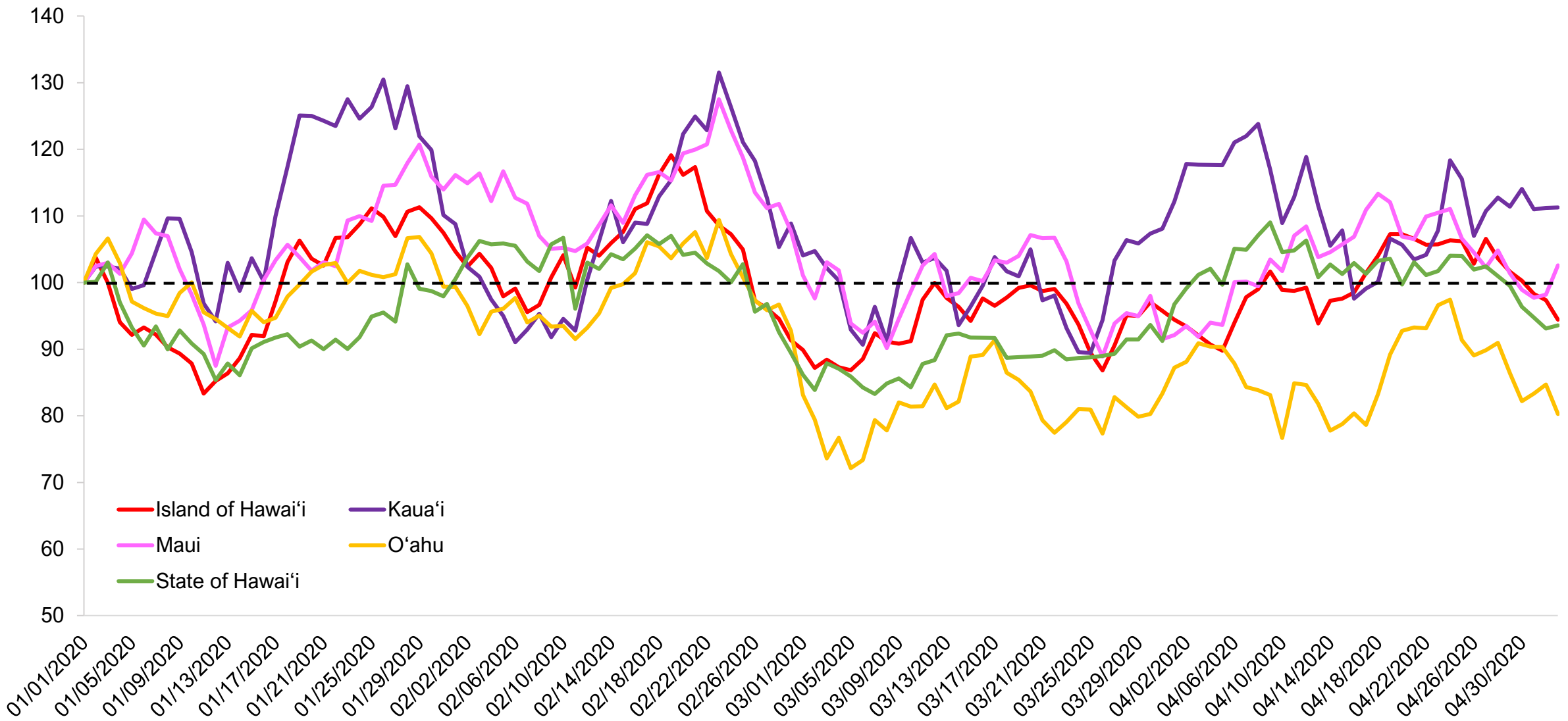
Question: (Net) Which of the following destinations have you talked about with friends and family in the PAST TWO WEEKS (whether in-person, online, or through social media?)

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?

Index of U.S. Consideration (% Yes) Two-Week Moving Average

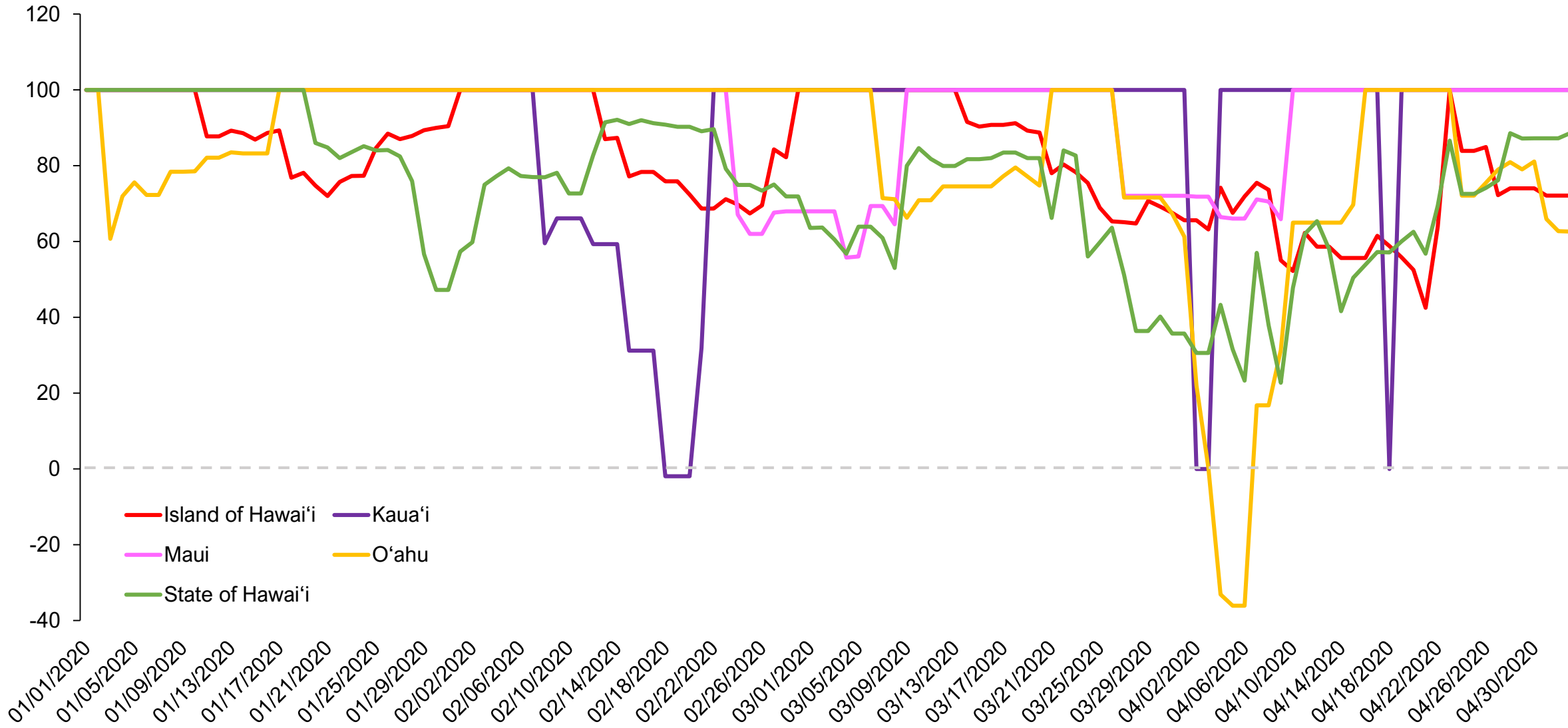


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Japan Destination Index Trends

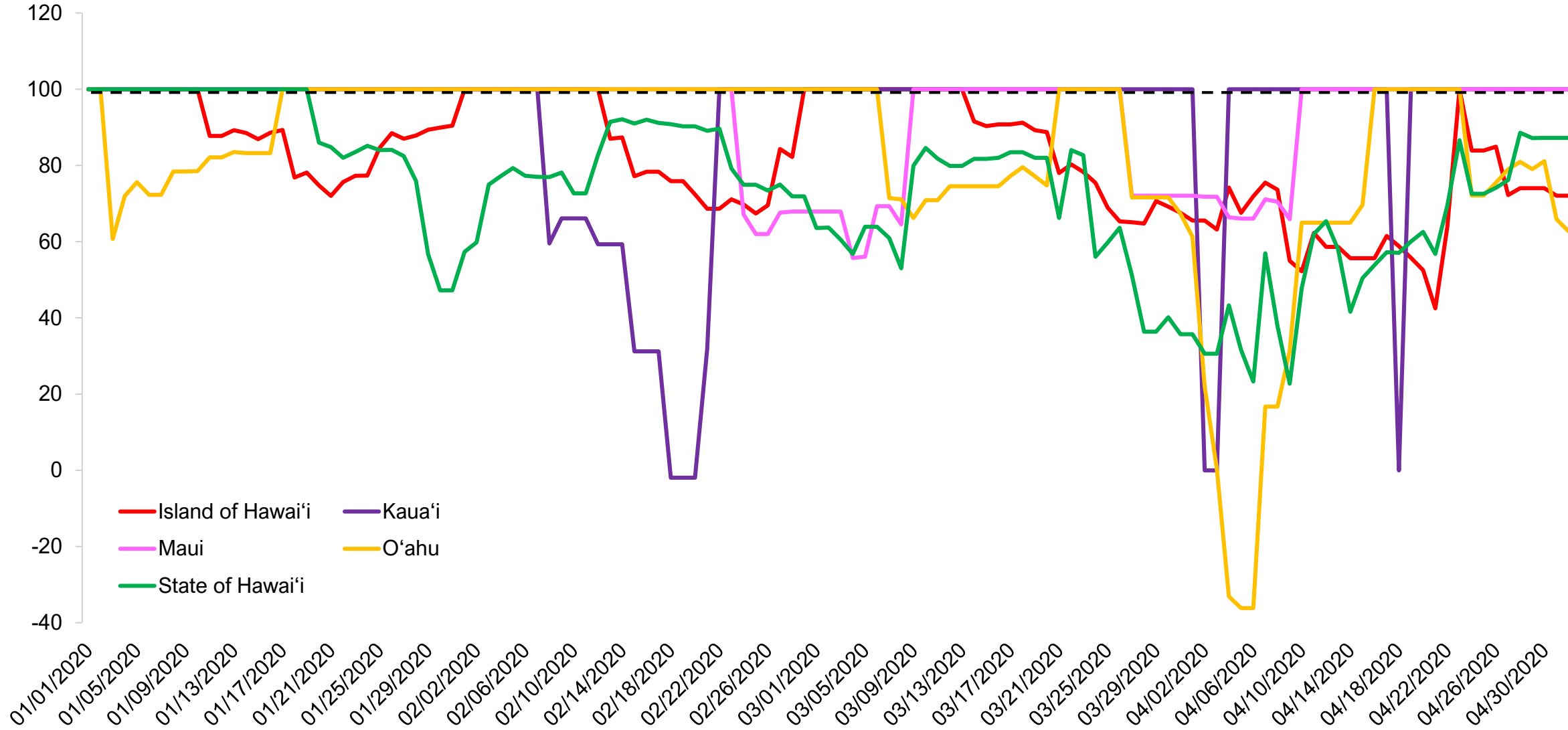
HAWAII TOURISM
AUTHORITY

Japan Buzz Net Score Two-Week Moving Average



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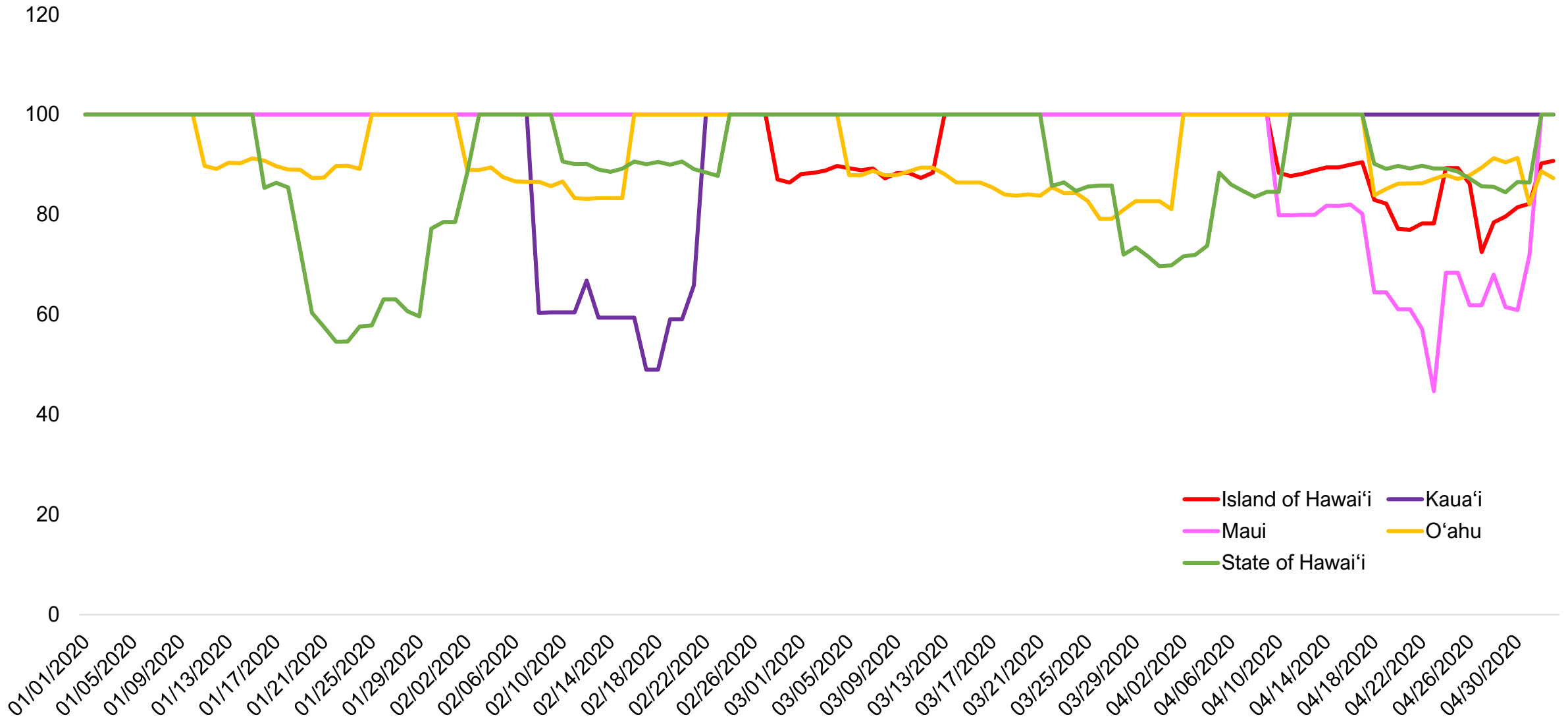
Index of Japan Buzz Net Score Two-Week Moving Average



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Japan Recommend Net Score Two-Week Moving Average

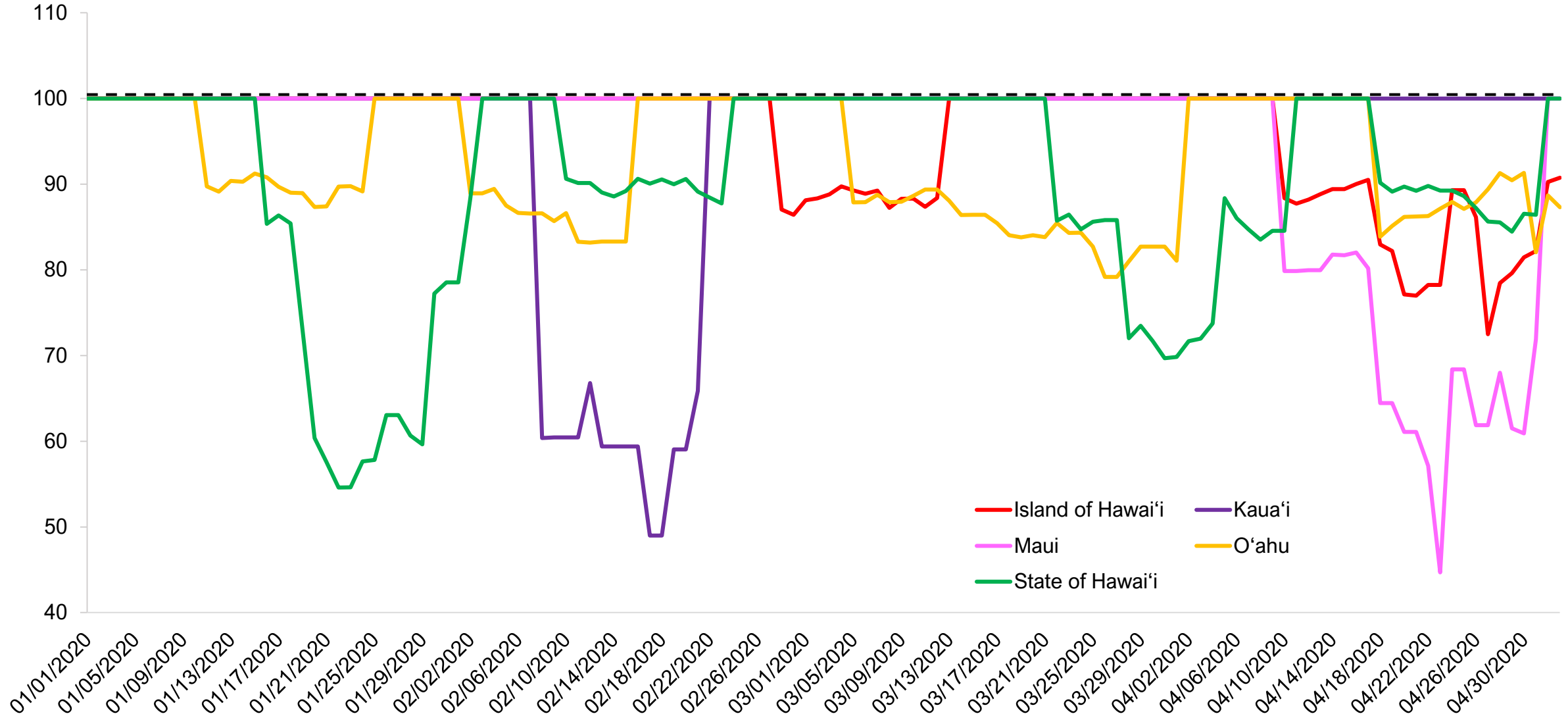


— Island of Hawai'i — Kaua'i
— Maui — O'ahu
— State of Hawai'i

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?

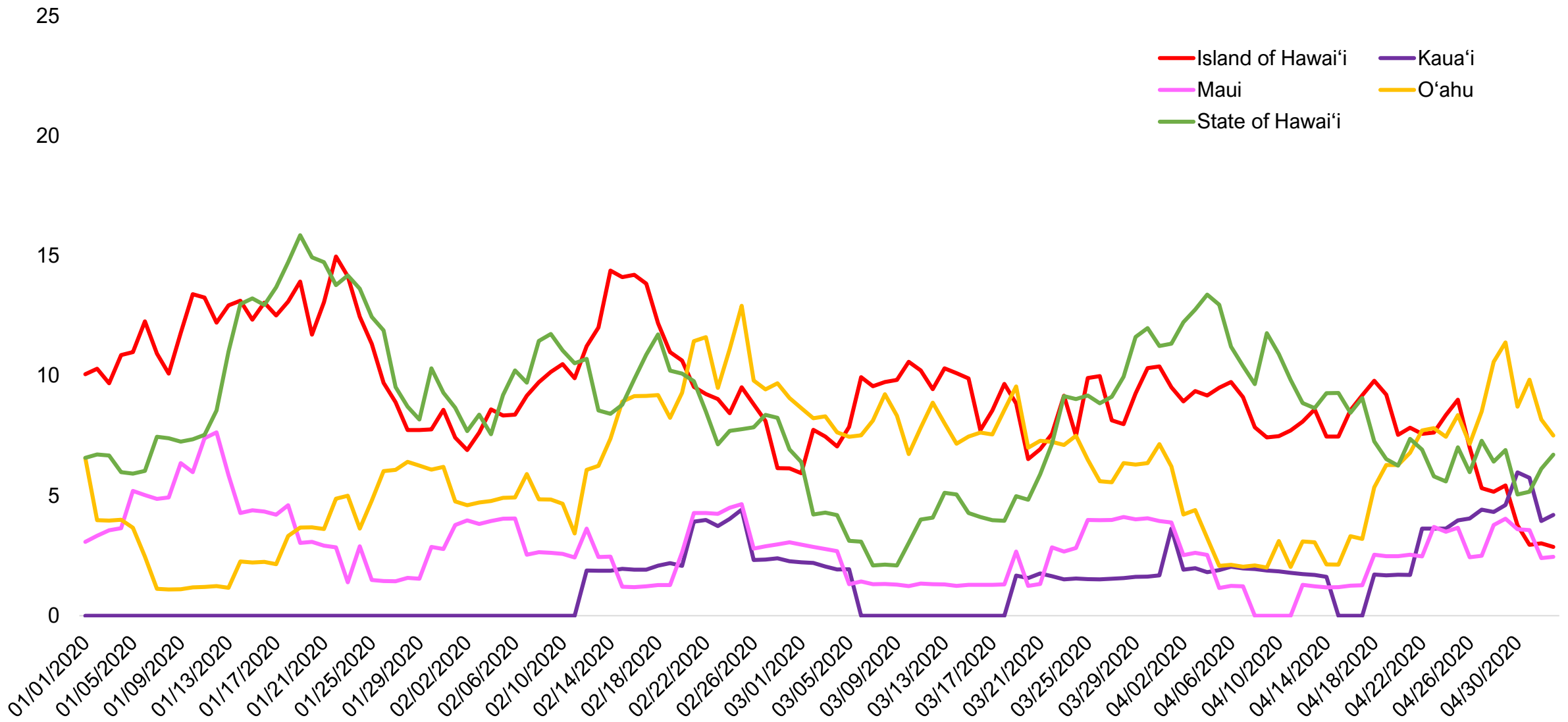
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Index of Japan Recommend Net Score Two-Week Moving Average



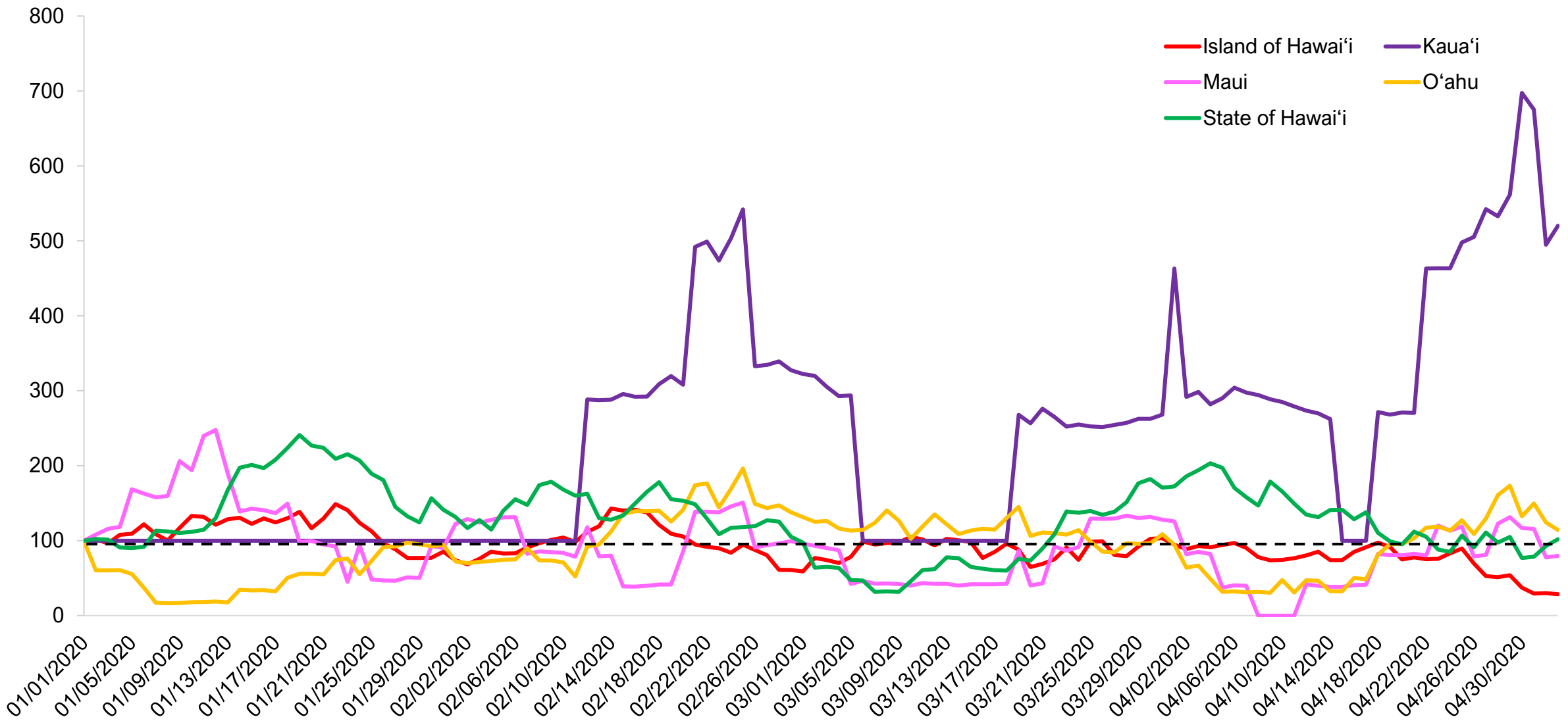
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Japan Word of Mouth Exposure (% Yes) Two-Week Moving Average



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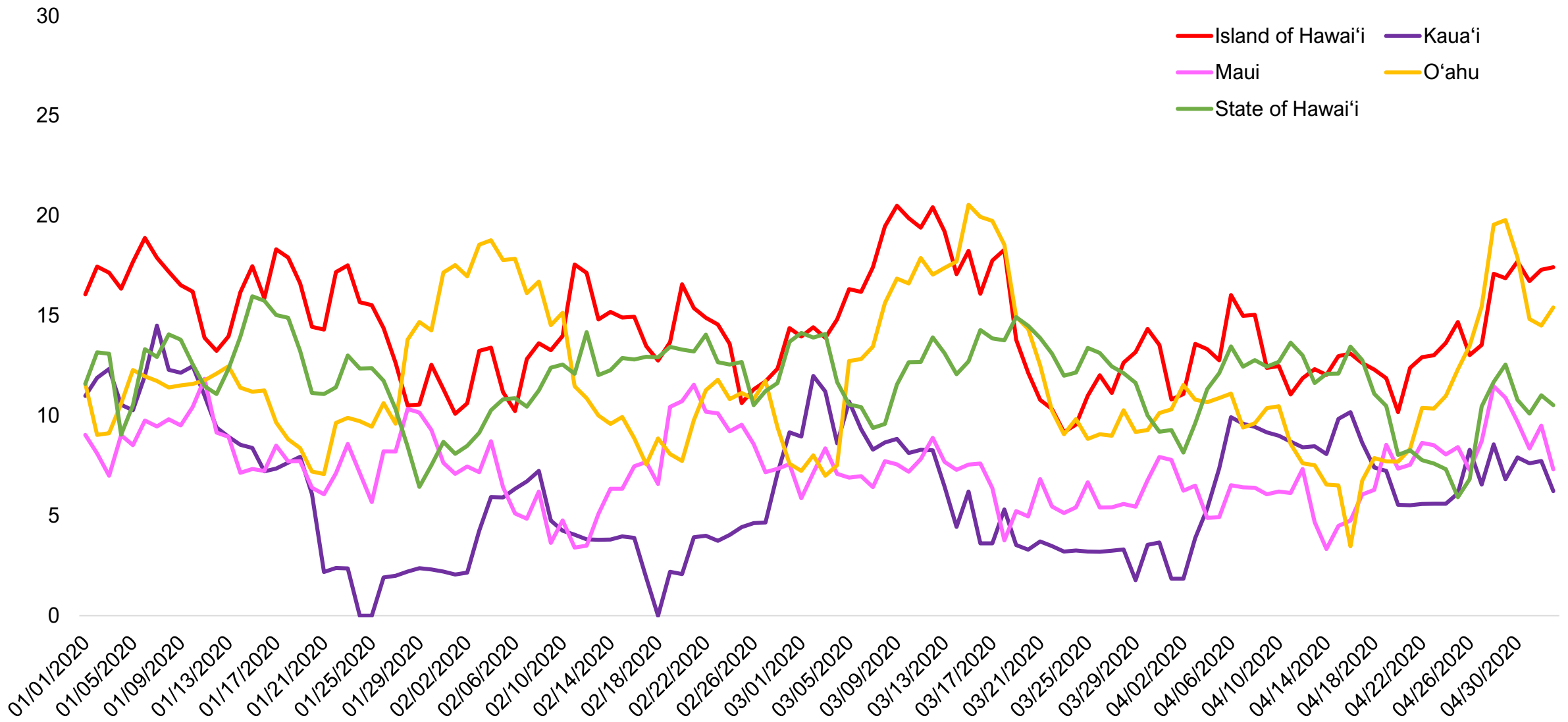
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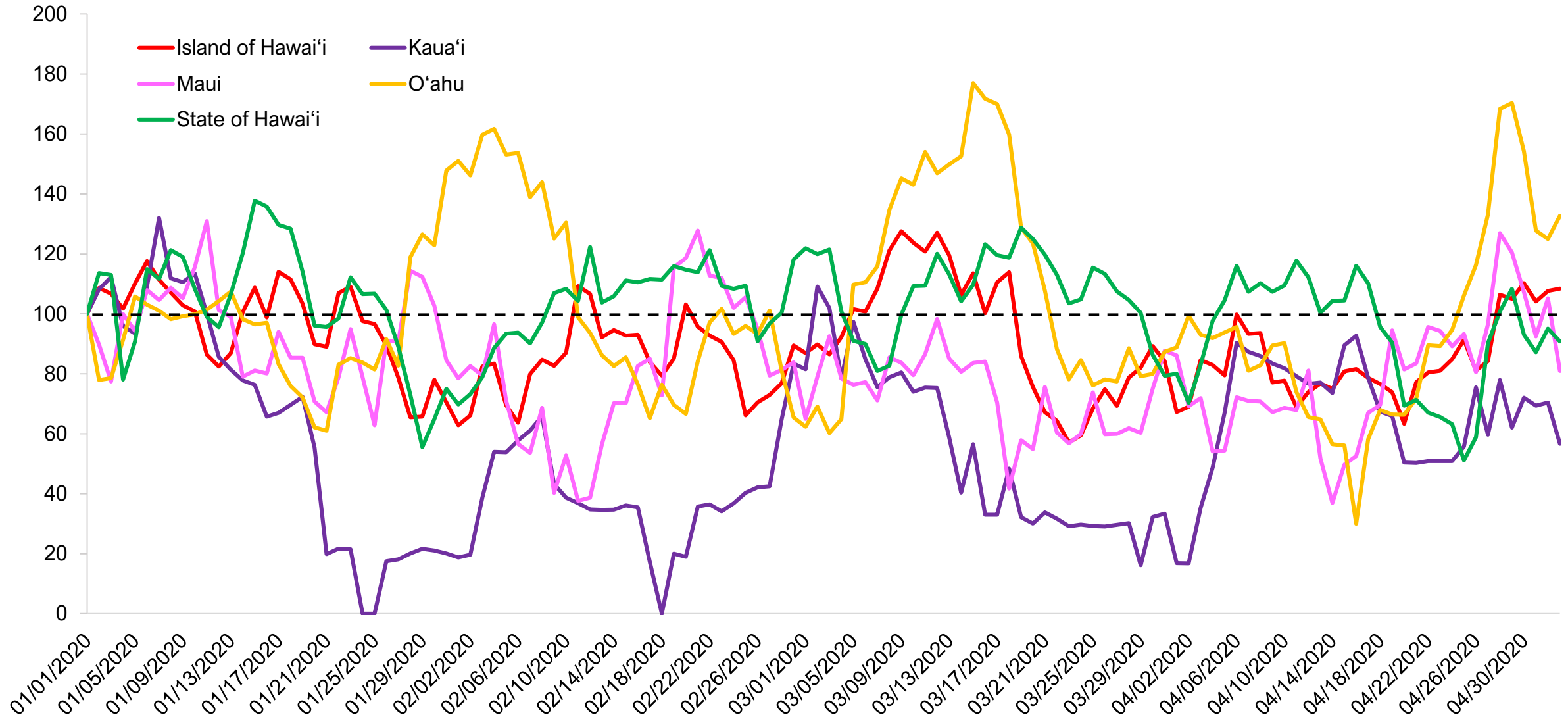
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Index of Japan Consideration (% Yes) Two-Week Moving Average

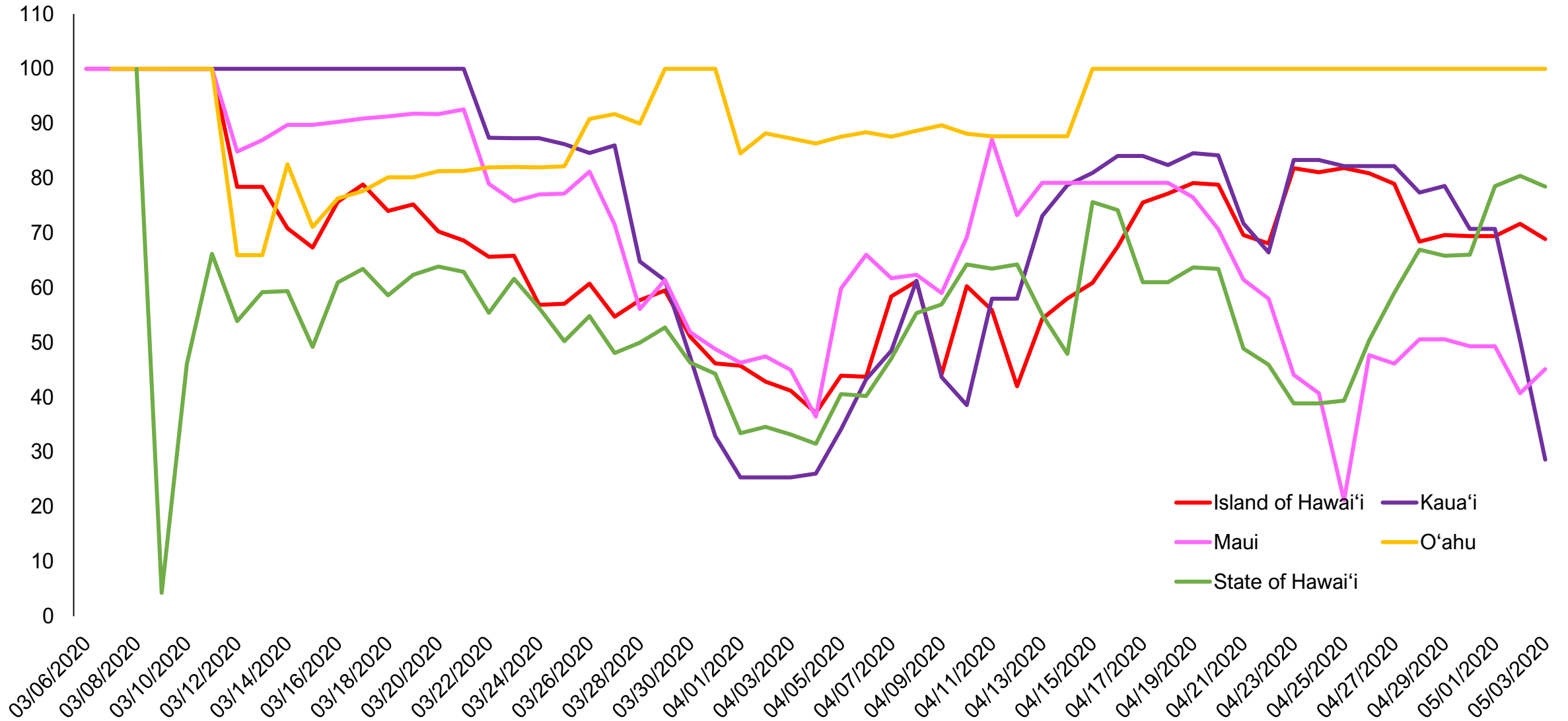


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Australia Destination Index Trends



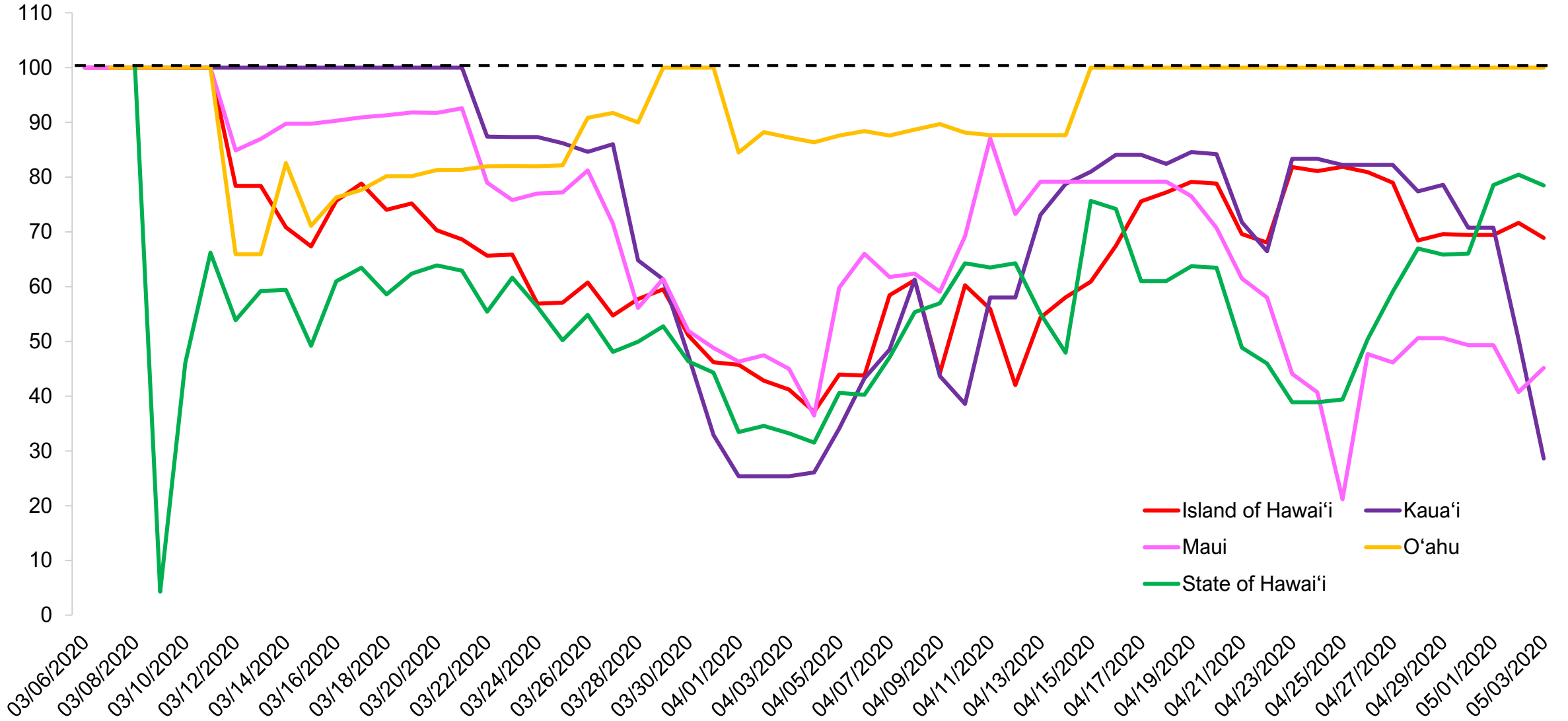
Australia Buzz Net Score Two-Week Moving Average



— Island of Hawai'i — Kaua'i
— Maui — O'ahu
— State of Hawai'i

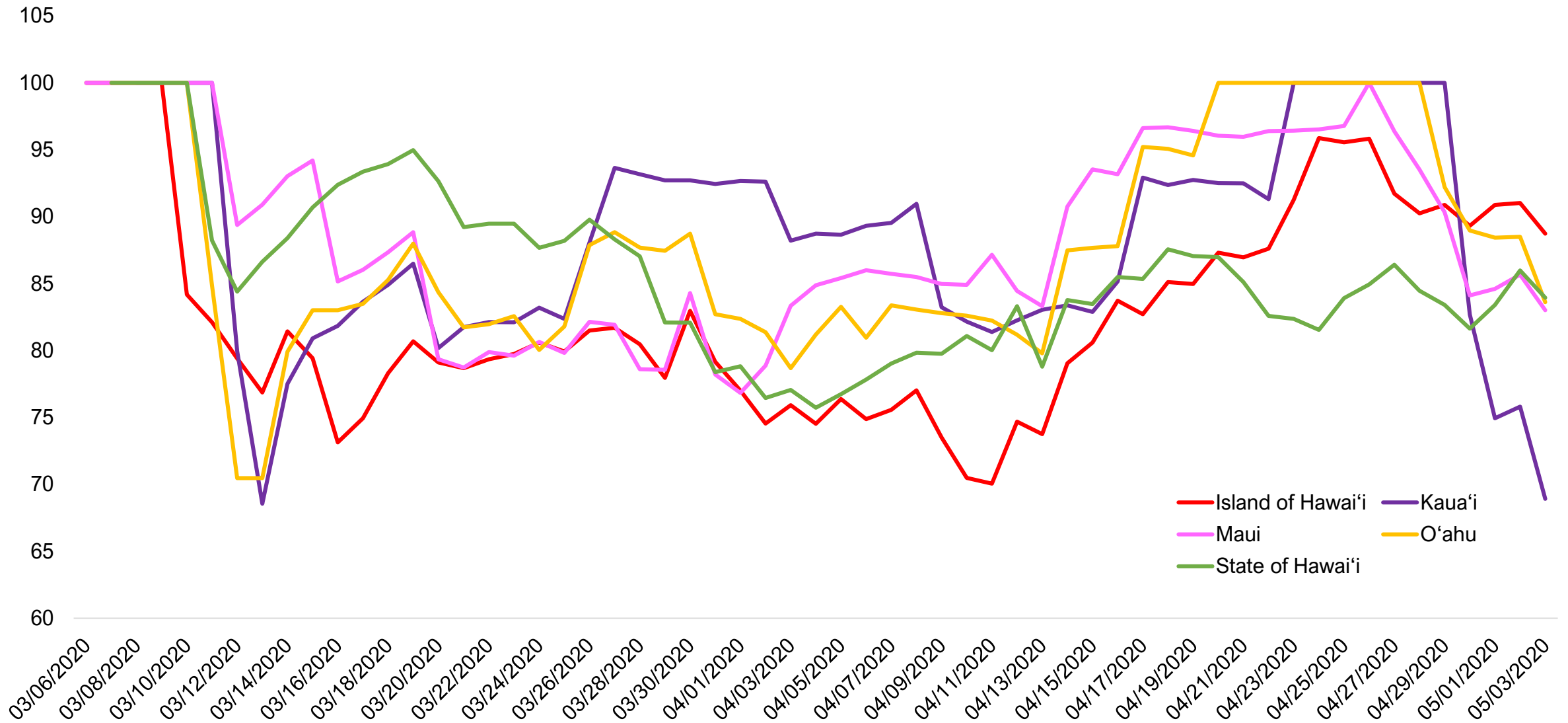
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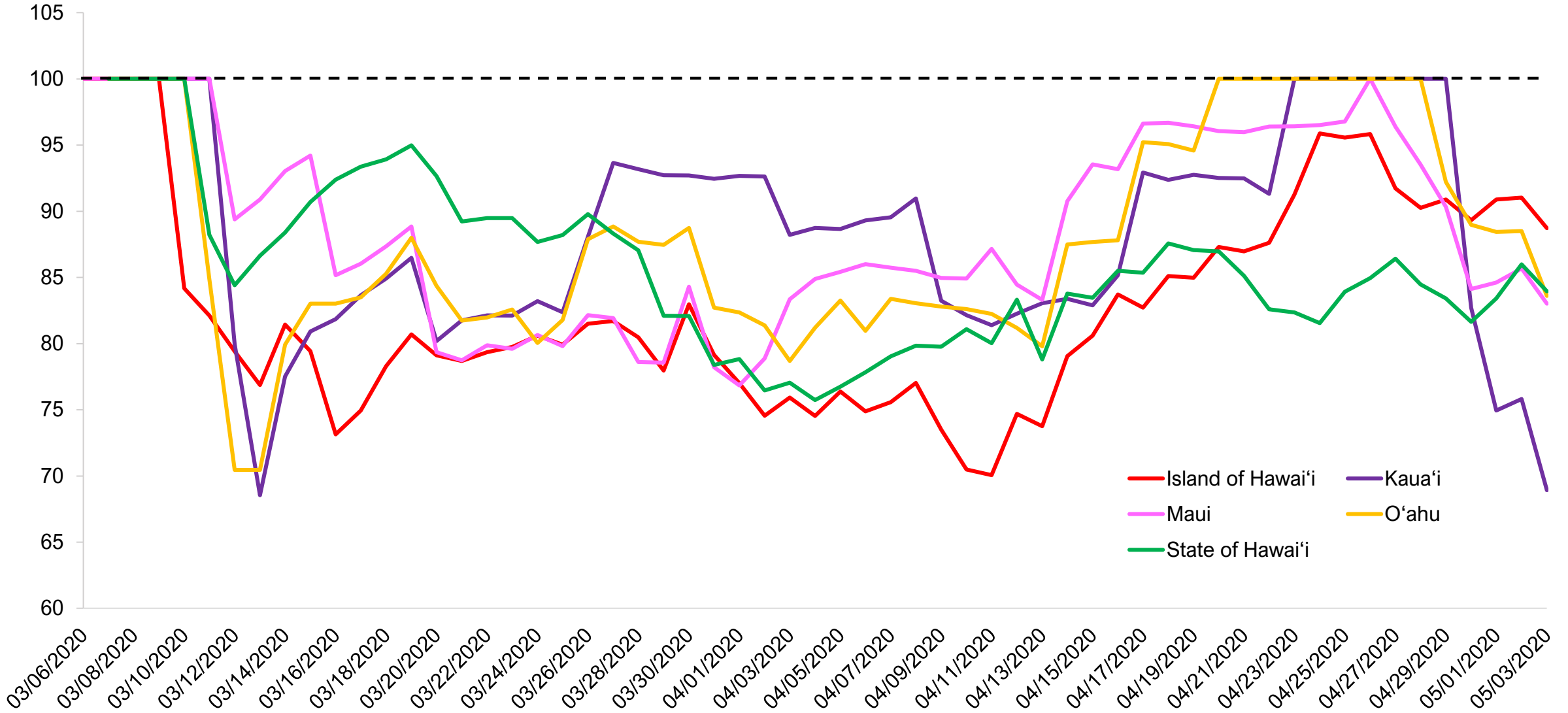
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Australia Recommend Net Score Two-Week Moving Average



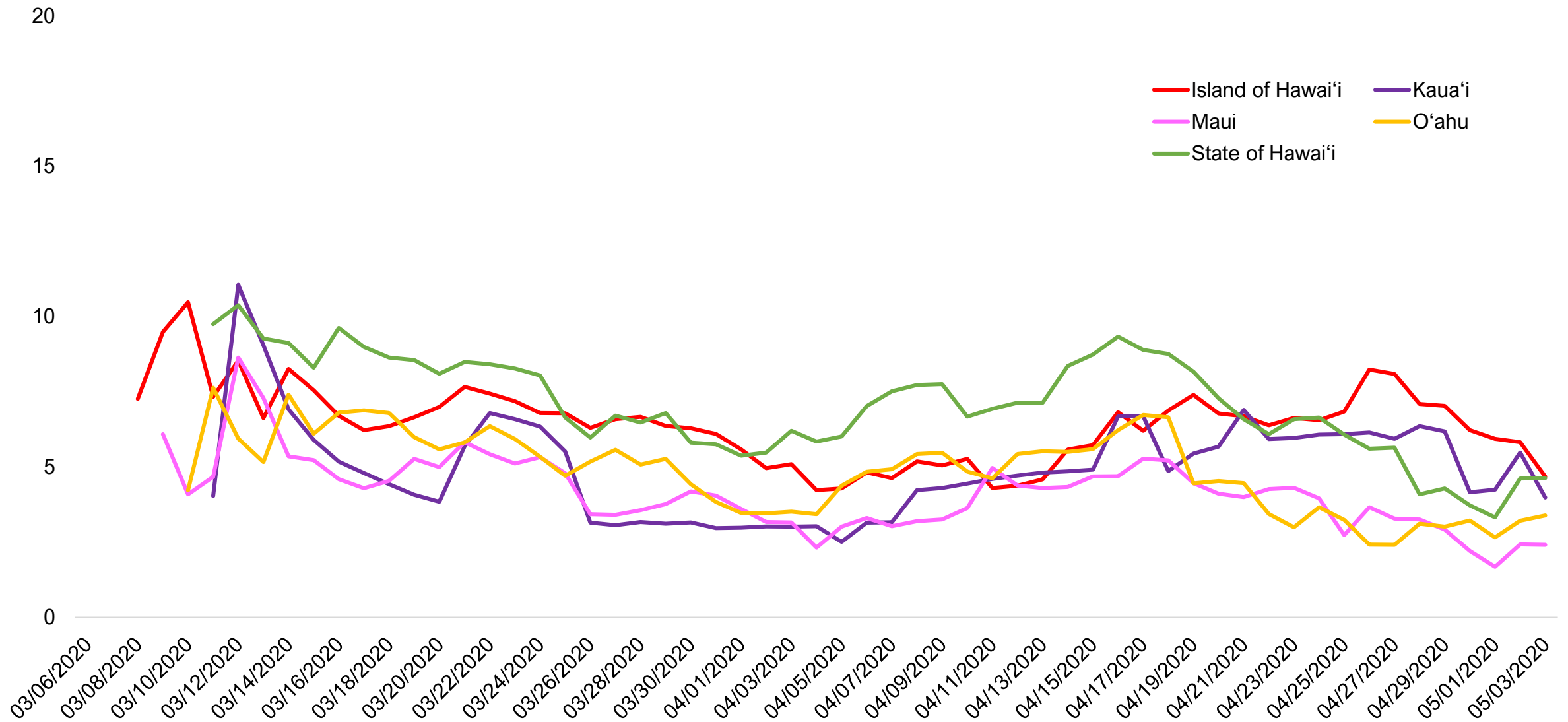
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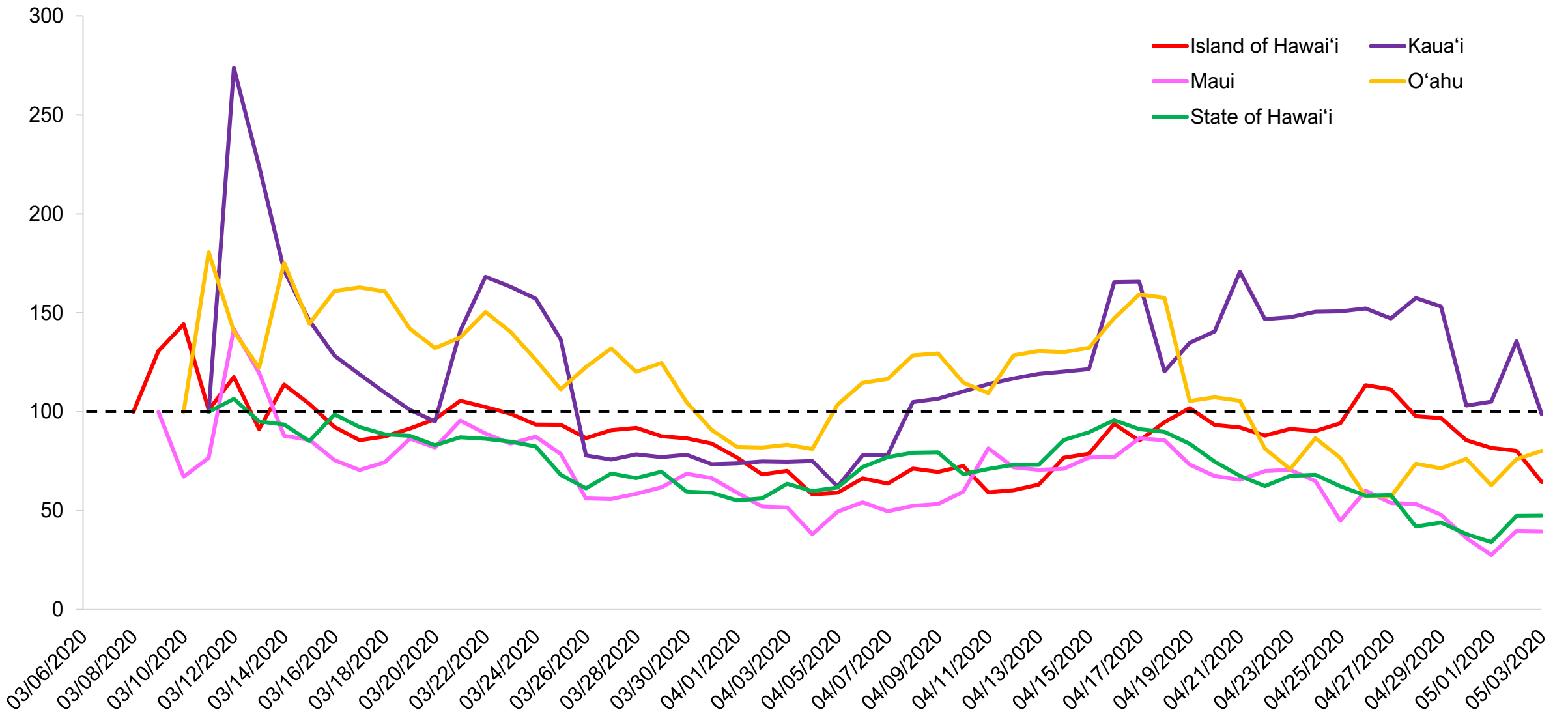
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Australia Word of Mouth Exposure (% Yes) Two-Week Moving Average



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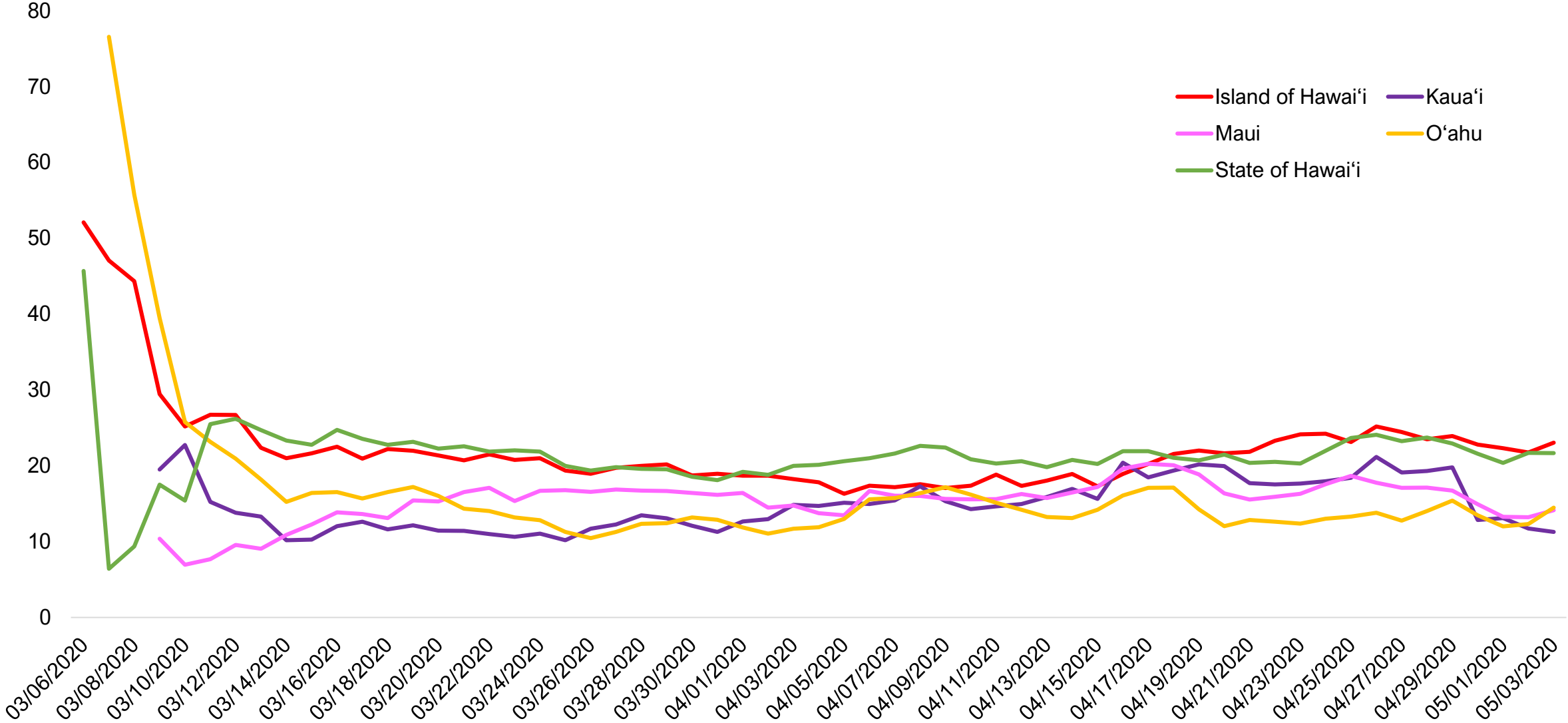
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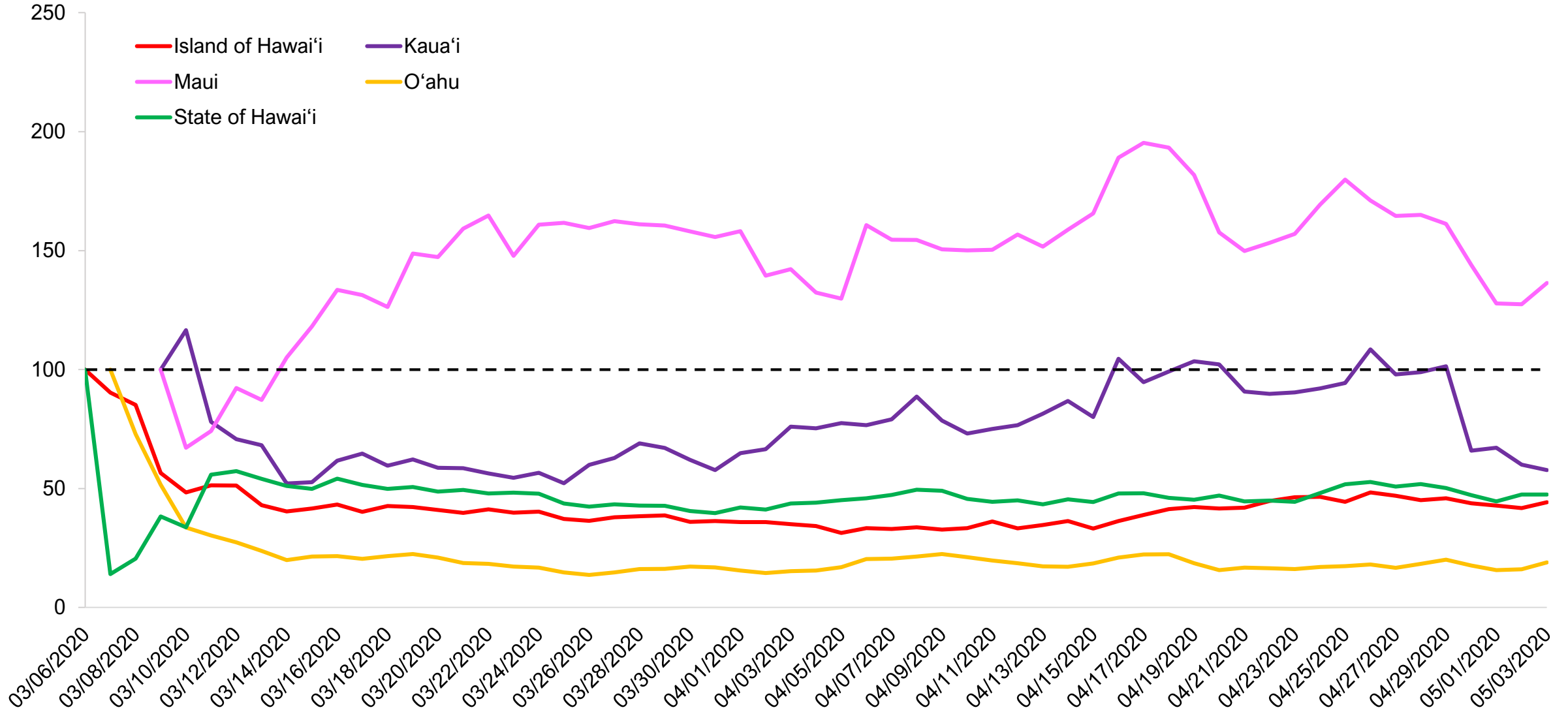
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