

YouGov Destination Index Trends

March 15, 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

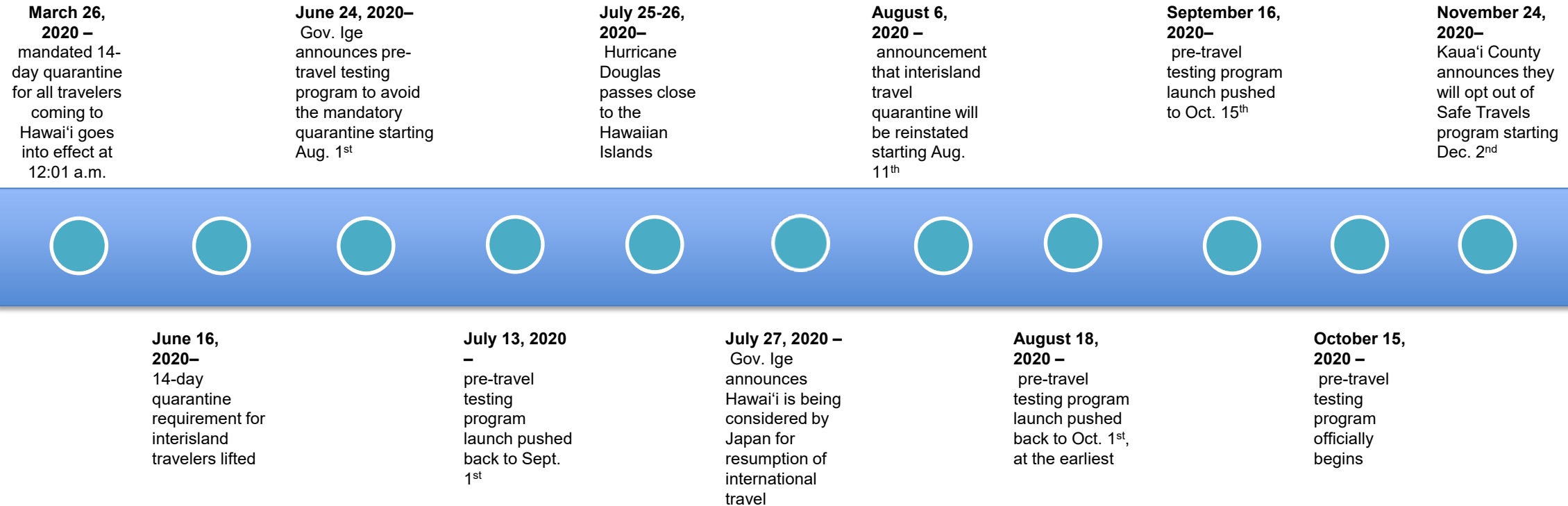
- Purchase Intent

- 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



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. 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

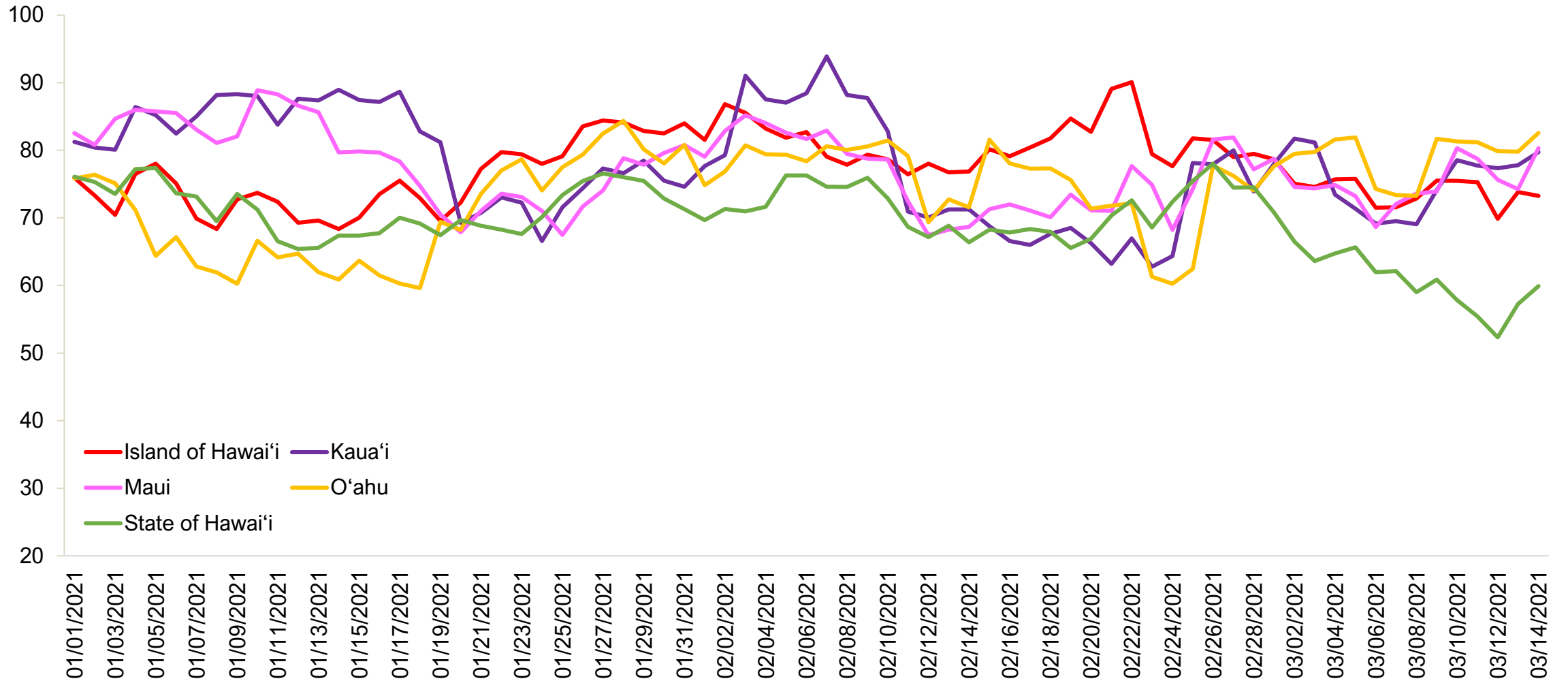
January 20, 2021 – all arriving passengers to Maui County must upload the *AlohaSafe* COVID-19 exposure app to their cell phones

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

U.S. Destination Index Trends



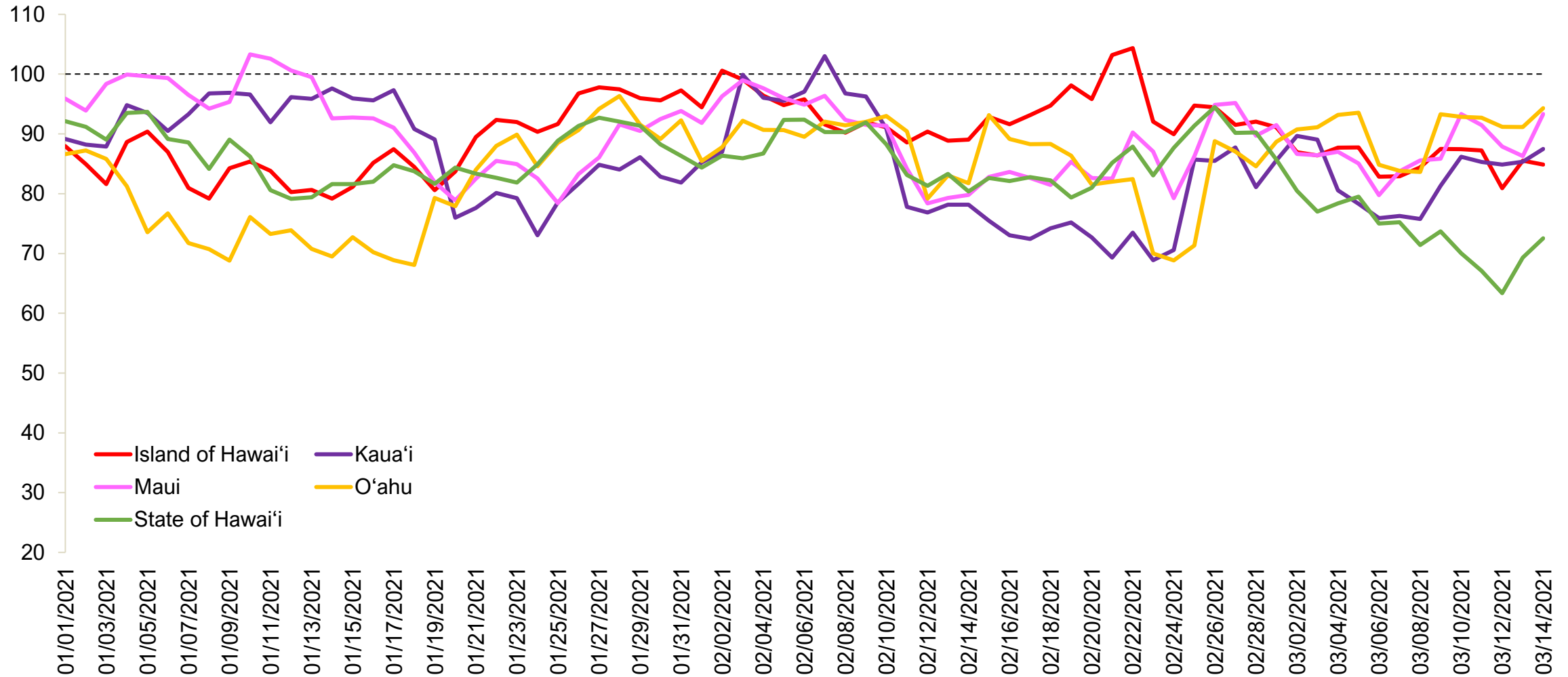
U.S. Buzz Net Score Two-Week Moving Average



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?

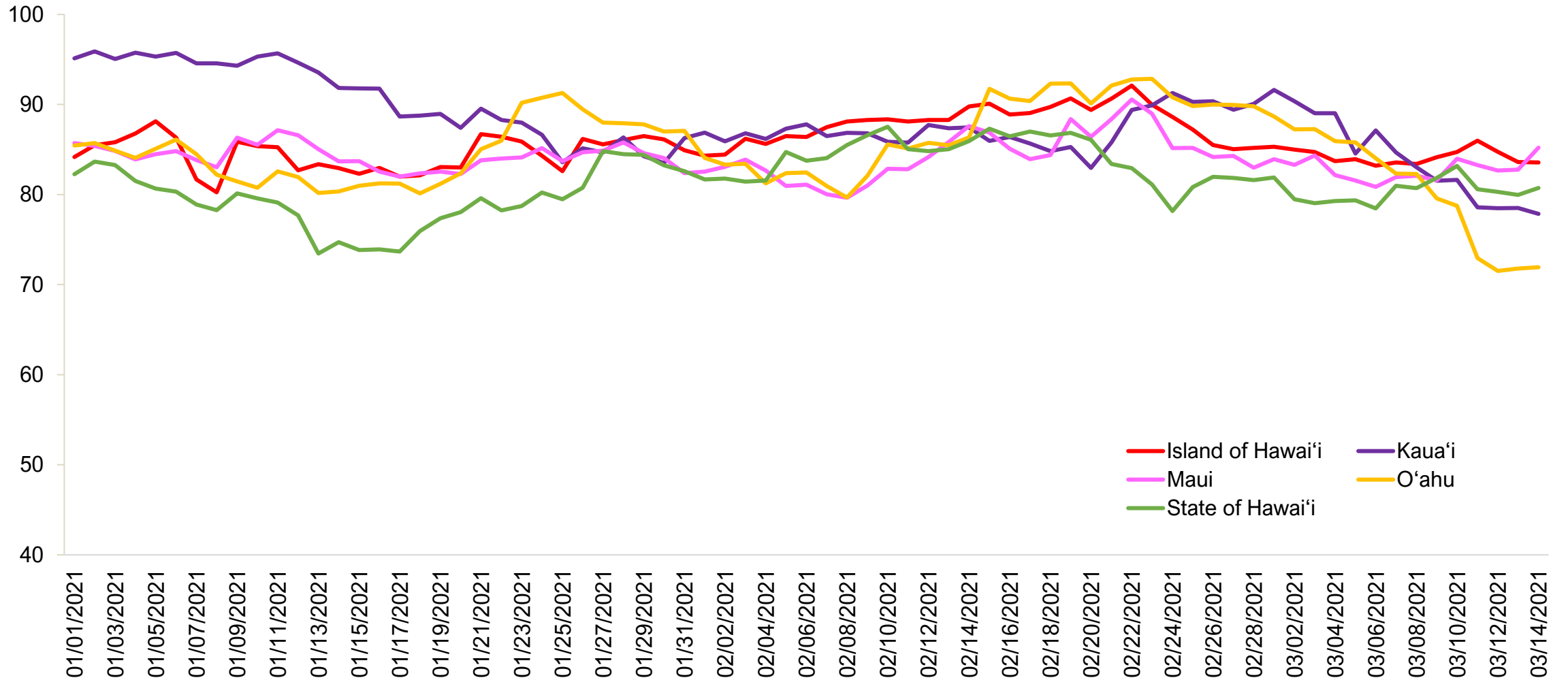
Source: YouGov data as of March 14, 2021

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



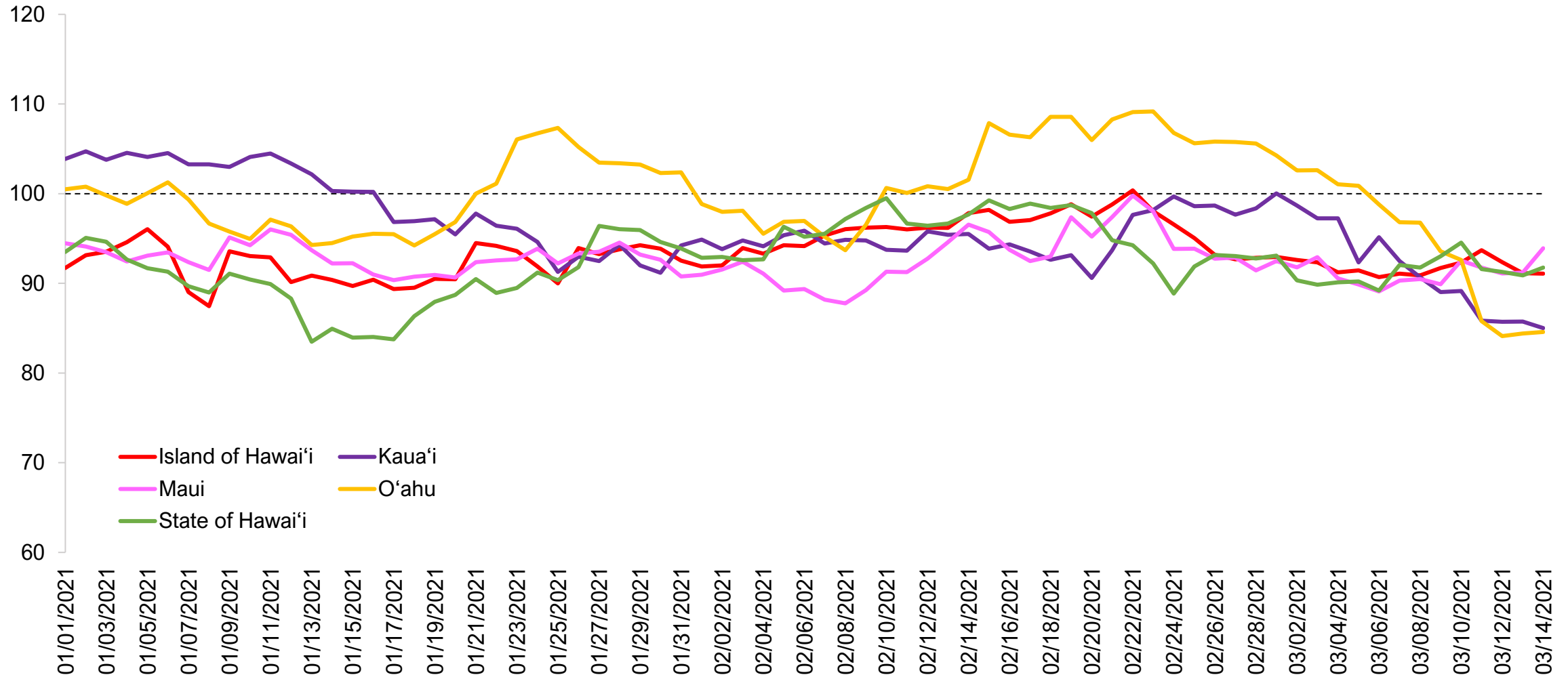
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U.S. Recommend Net Score Two-Week Moving Average



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?

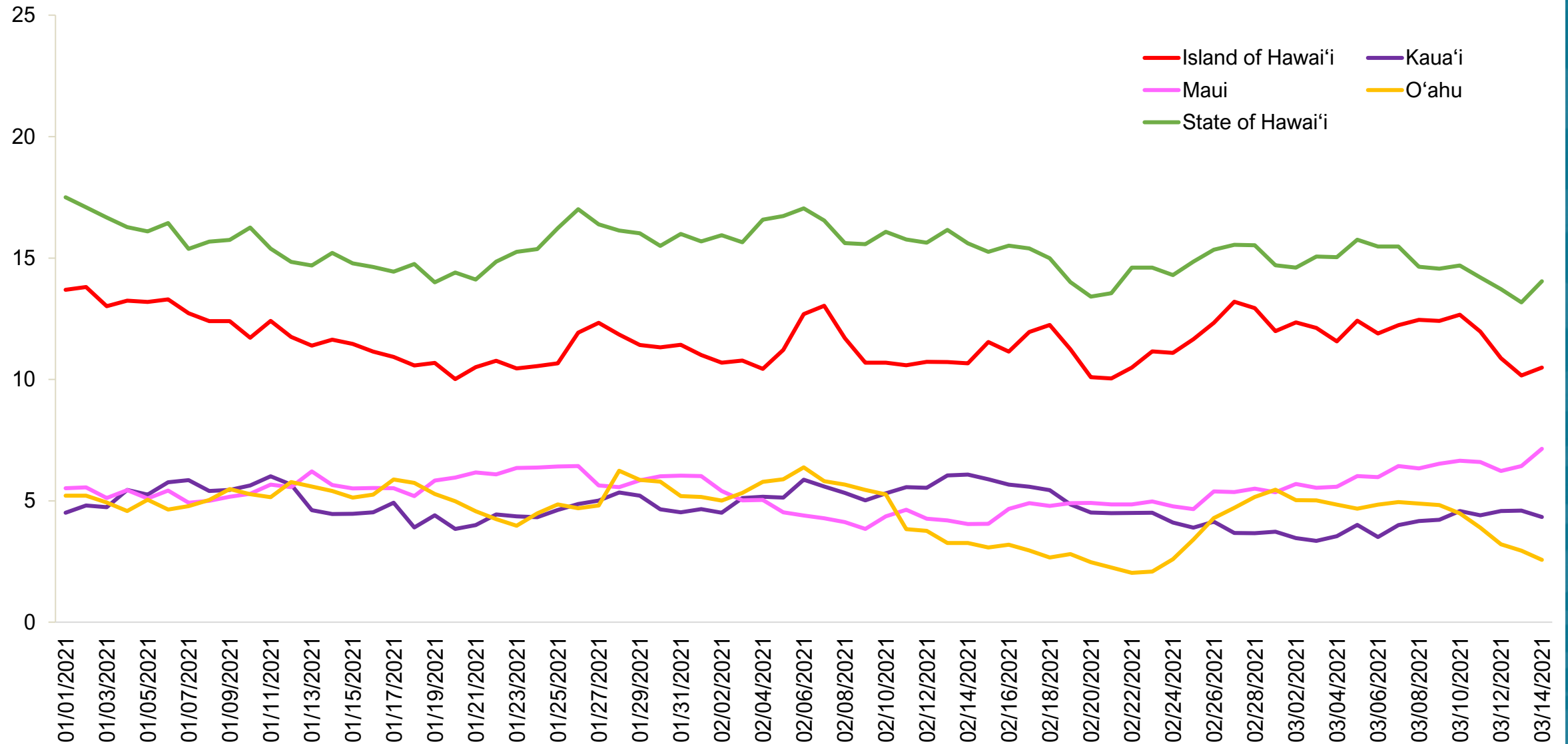
Index of U.S. Recommend Net Score Two-Week Moving Average



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 March 14, 2021

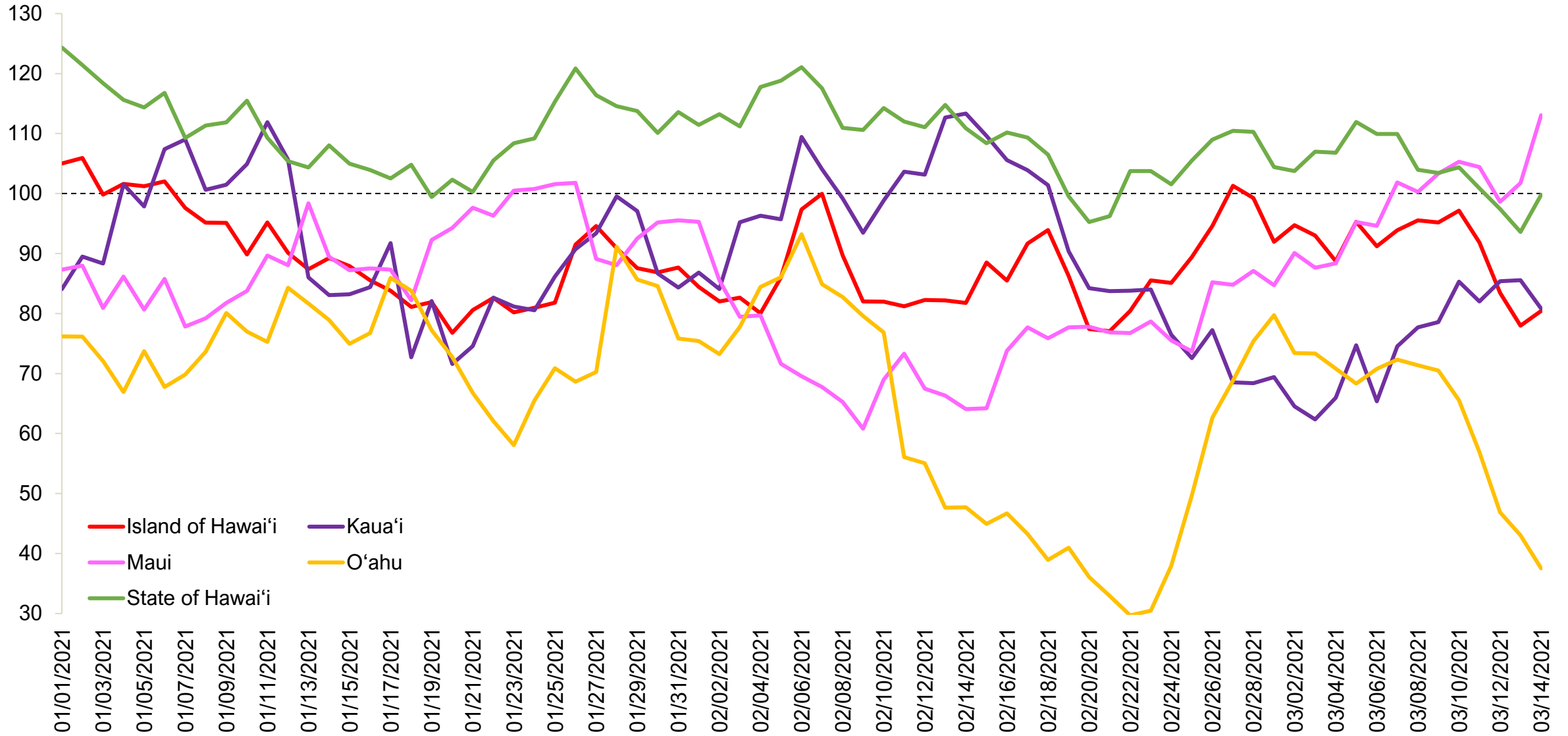
U.S. Word of Mouth Exposure (% Yes) Two-Week Moving Average



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?)

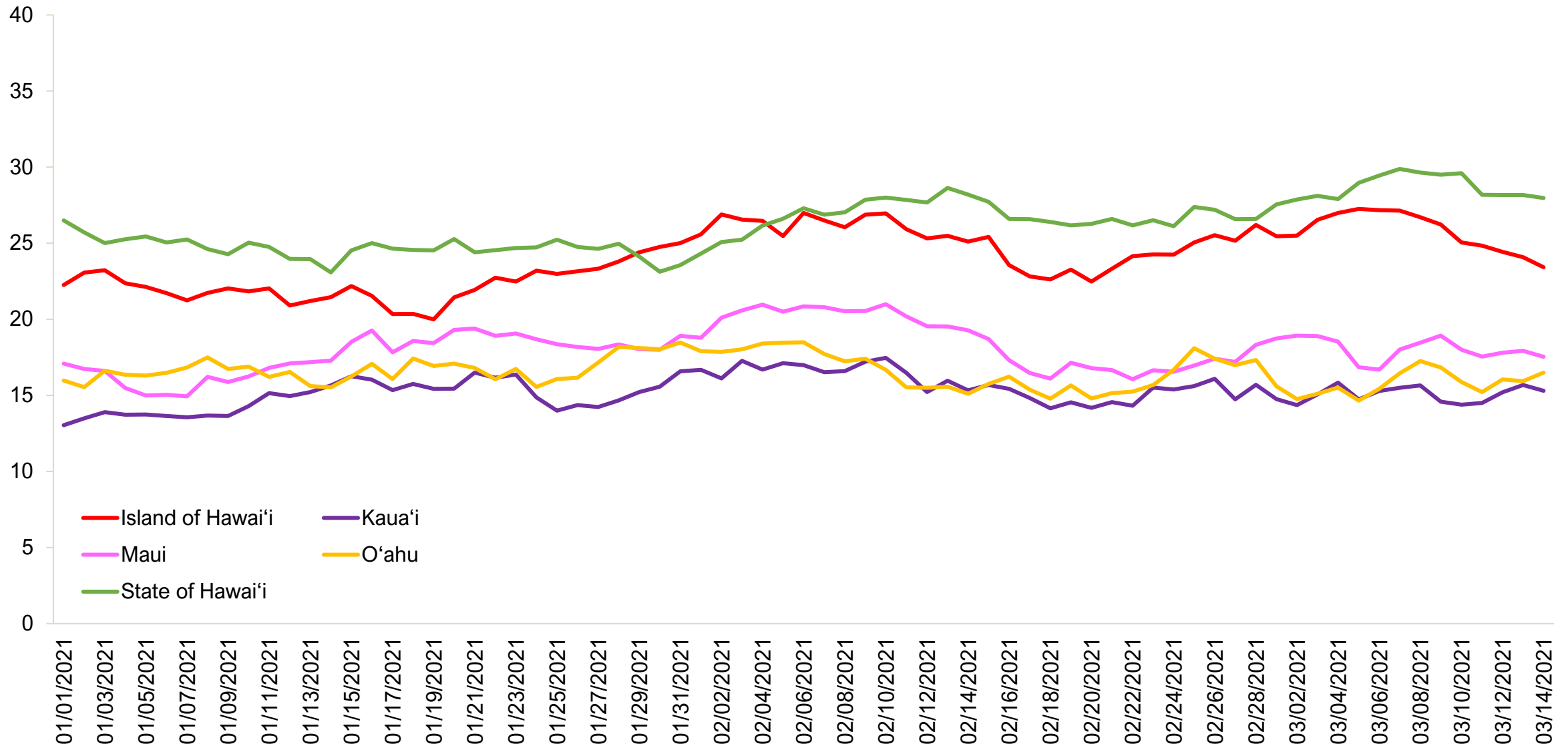
Source: YouGov data as of March 14, 2021

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



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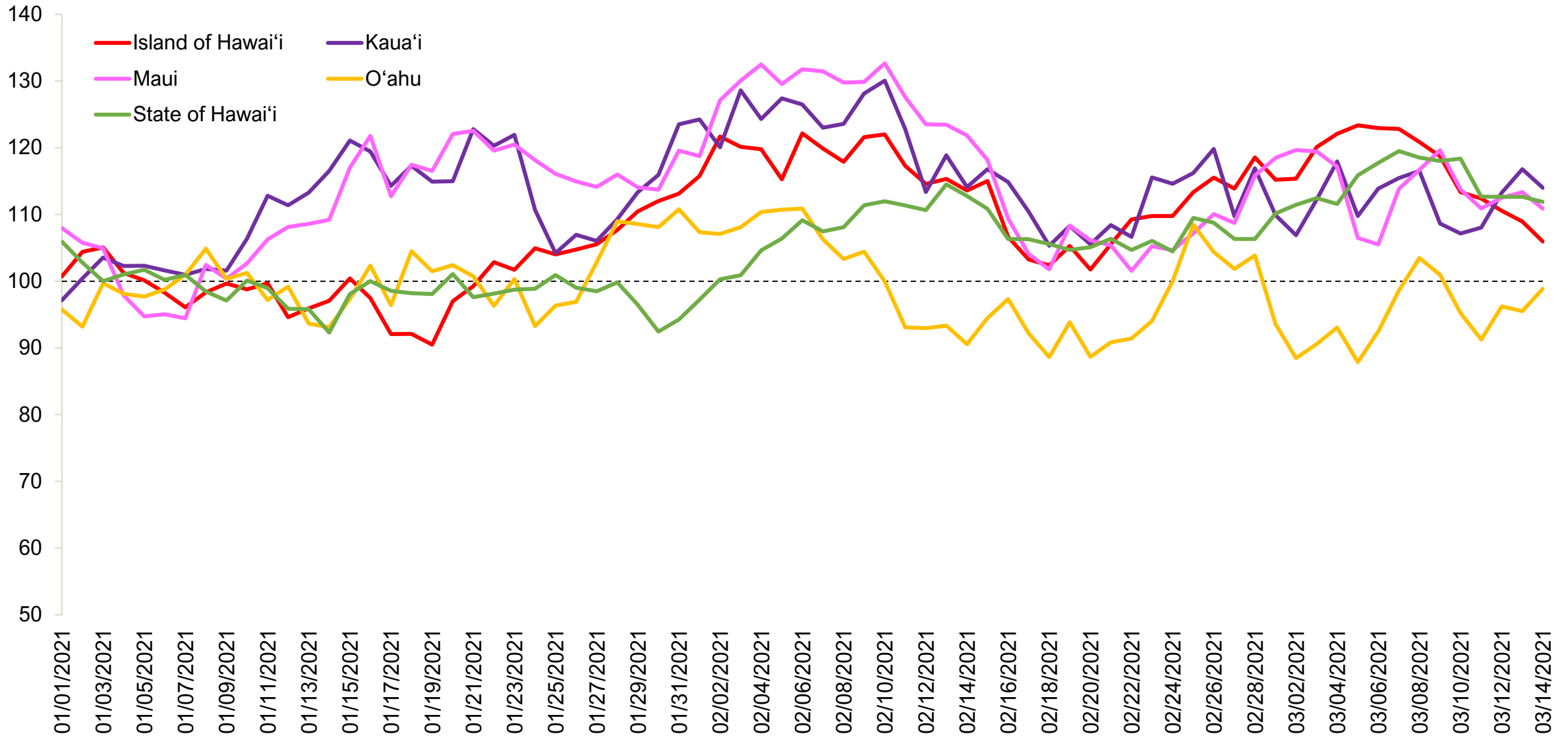
U.S. Consideration (% Yes) Two-Week Moving Average



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?

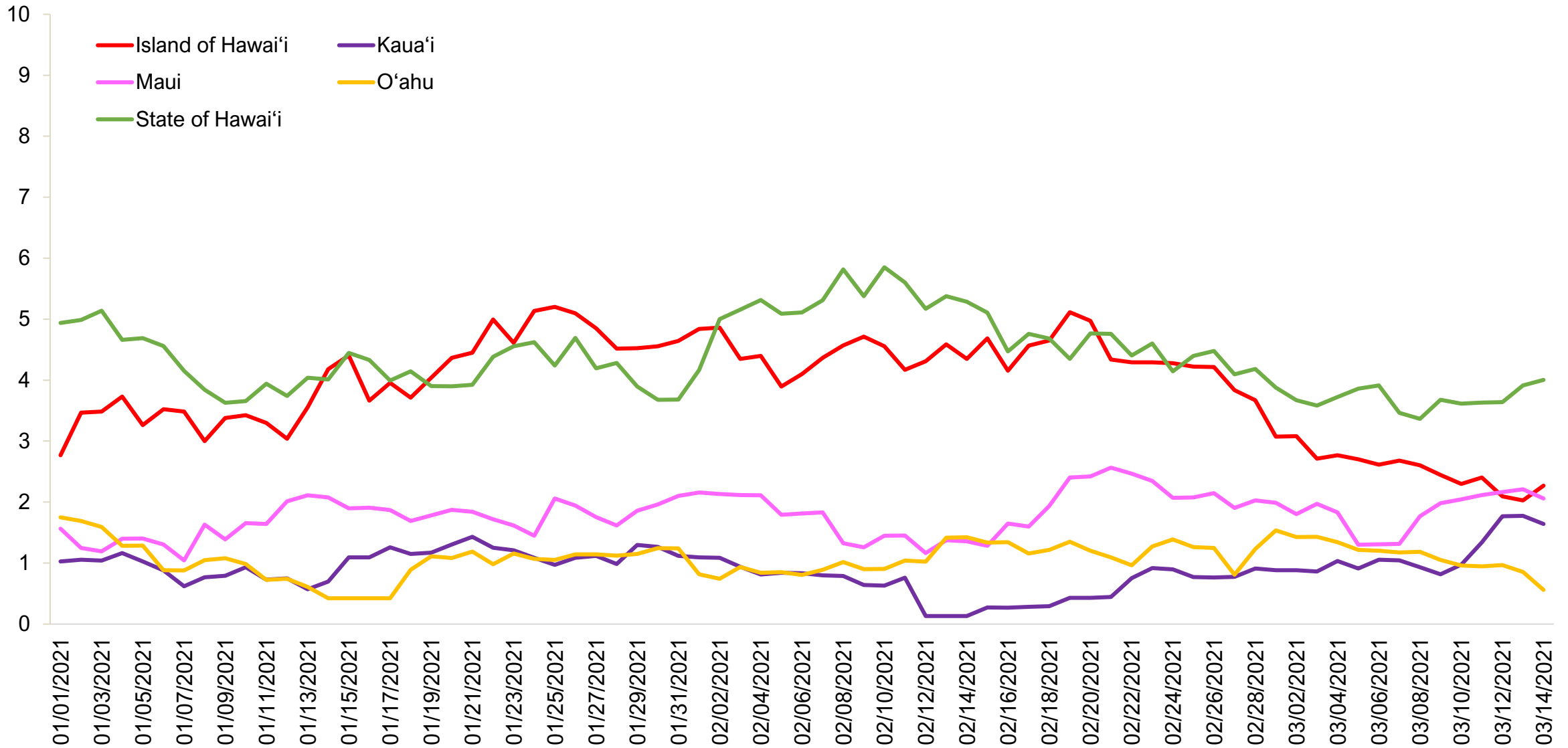
Source: YouGov data as of March 14, 2021

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



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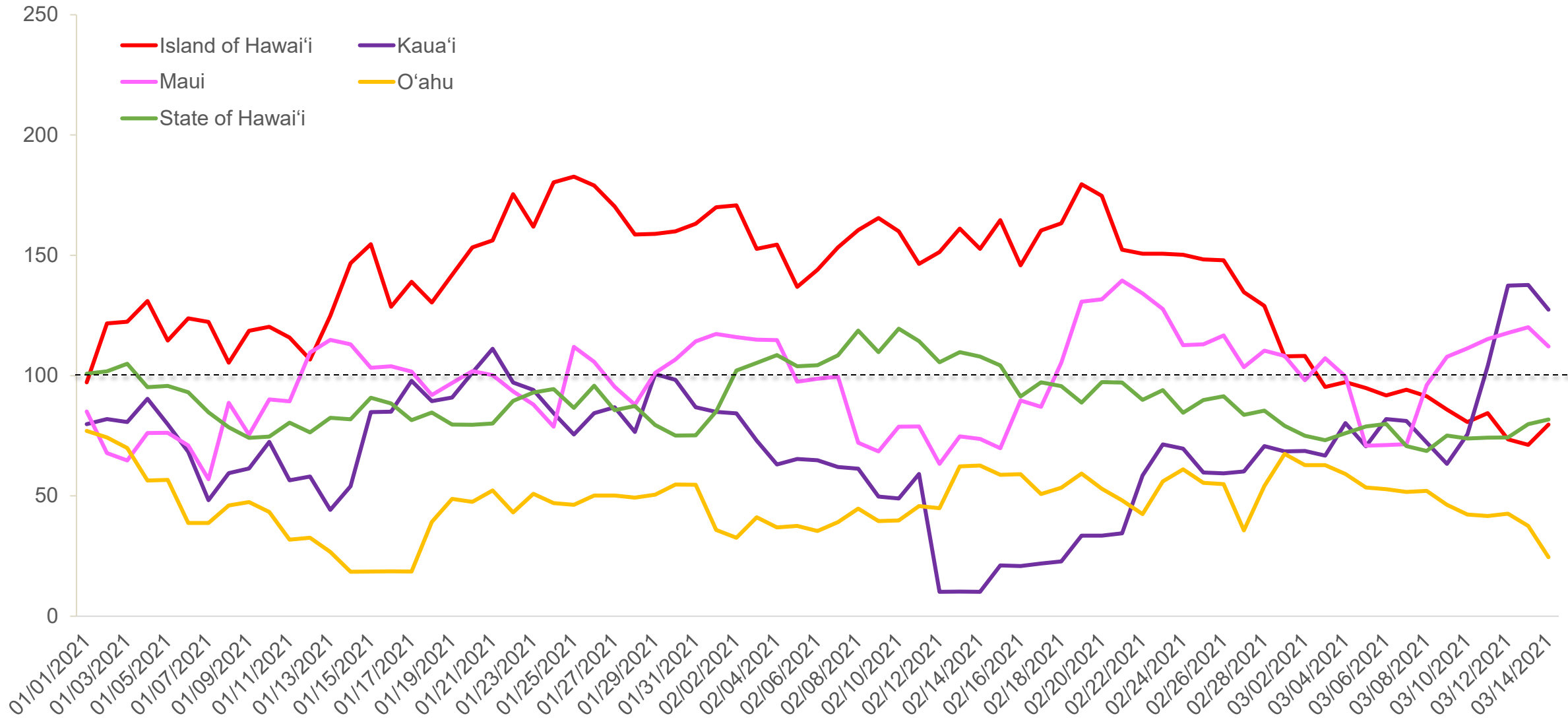
U.S. Purchase Intent (% Yes) Two-Week Moving Average



Question: (Net) Of the destinations considered, which are you most likely to visit?

Source: YouGov data as of March 14, 2021

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



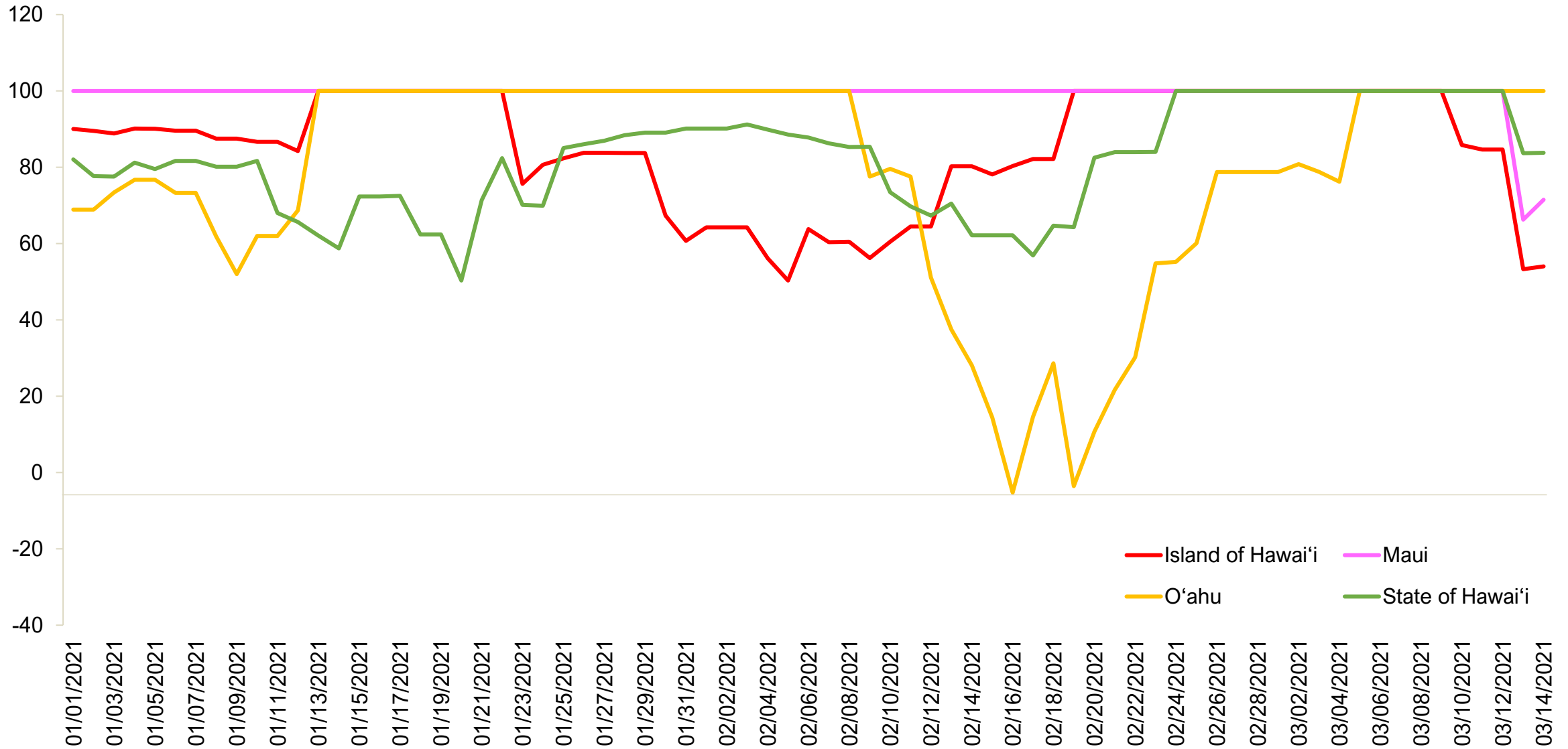
Question: (Net) Of the destinations considered, which are you most likely to visit?

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Japan Destination Index Trends

HAWAII TOURISM
AUTHORITY

Japan Buzz Net Score Two-Week Moving Average

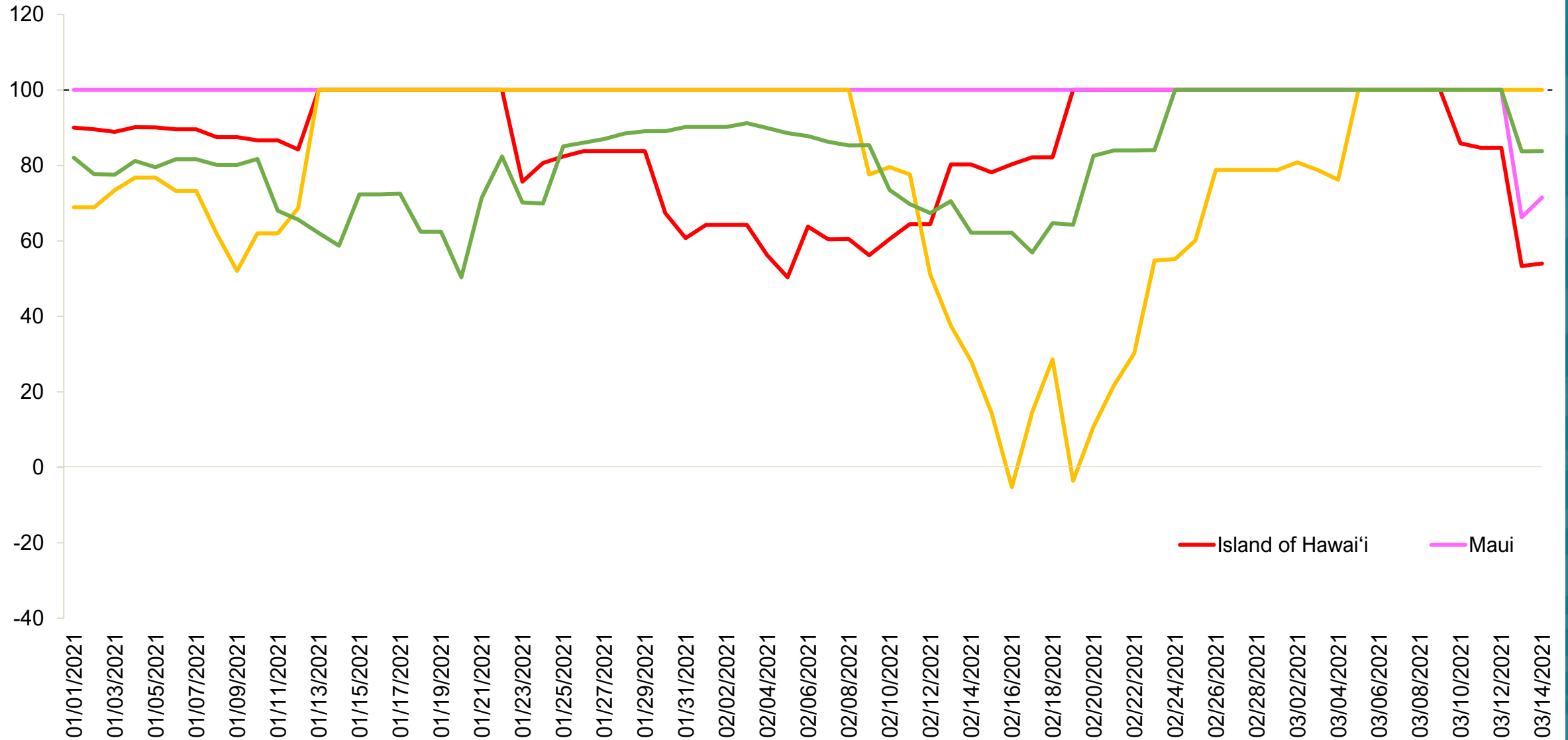


Question: (Net) Over the PAST TWO WEEKS, which of the following destinations have you heard something POSITIVE about (whether in the news, through advertising, or talking to friends and family)? / Now which of the following have you heard something NEGATIVE about over the PAST TWO WEEKS?

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

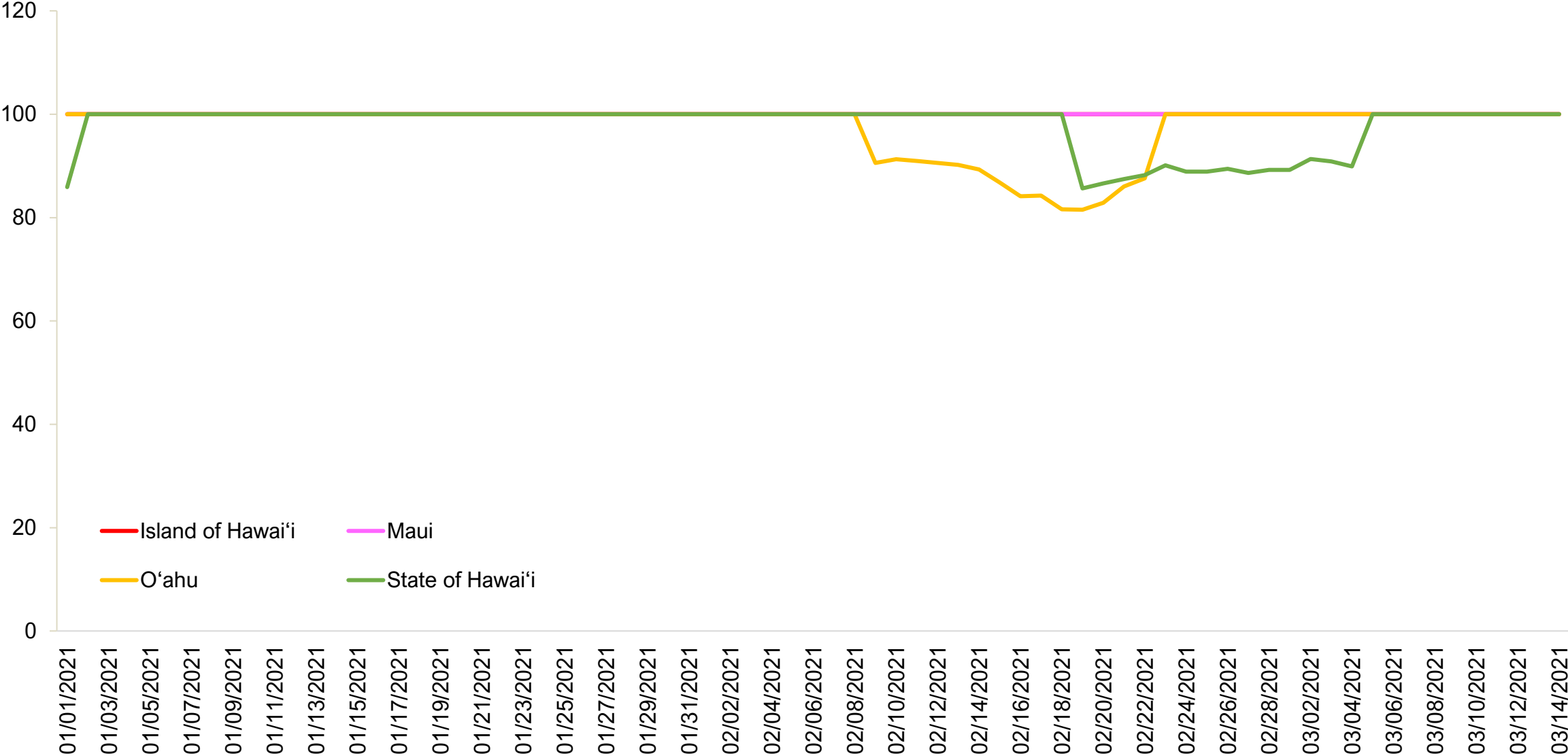
Source: YouGov data as of March 14, 2021

Index of Japan Buzz Net Score Two-Week Moving Average



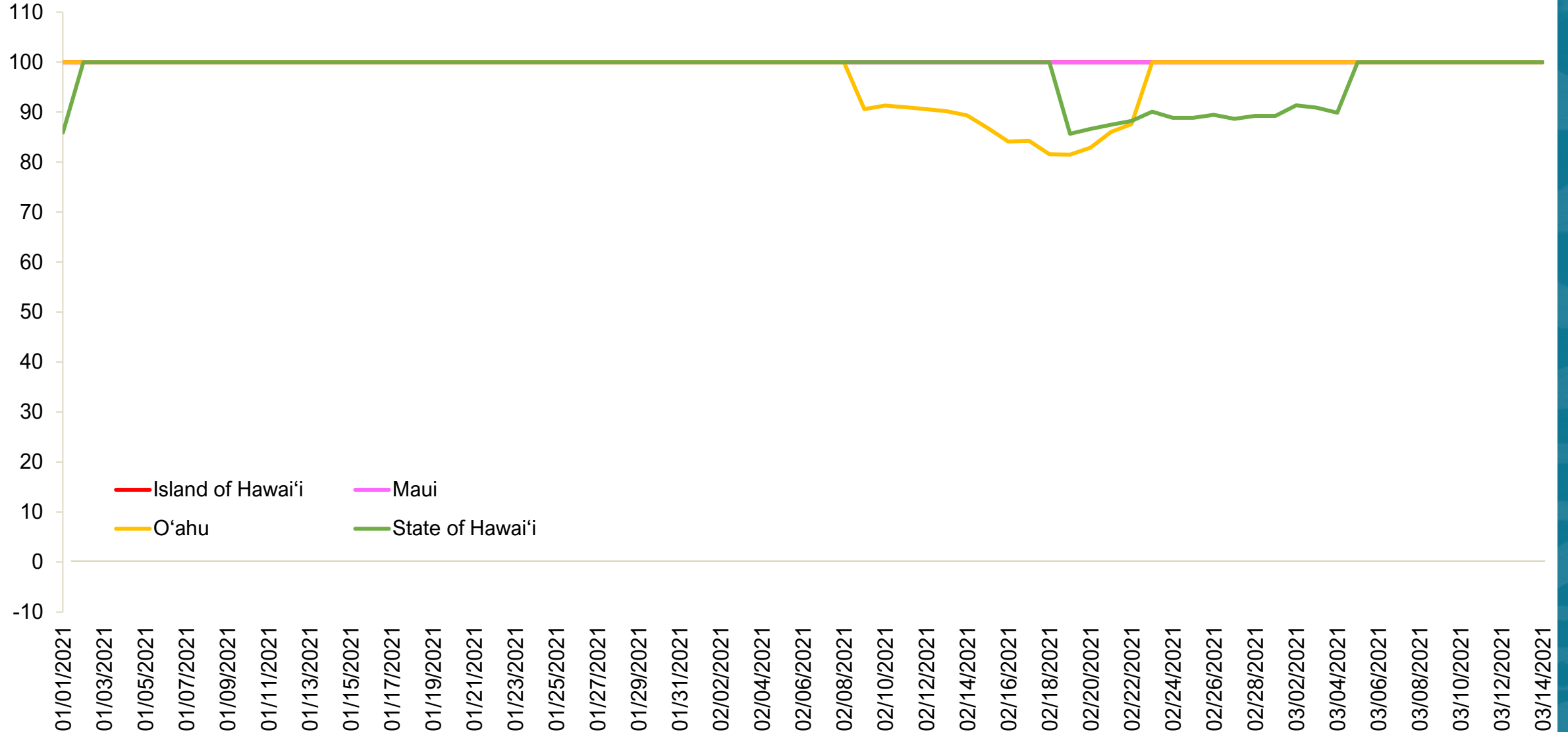
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Japan Recommend Net Score Two-Week Moving Average



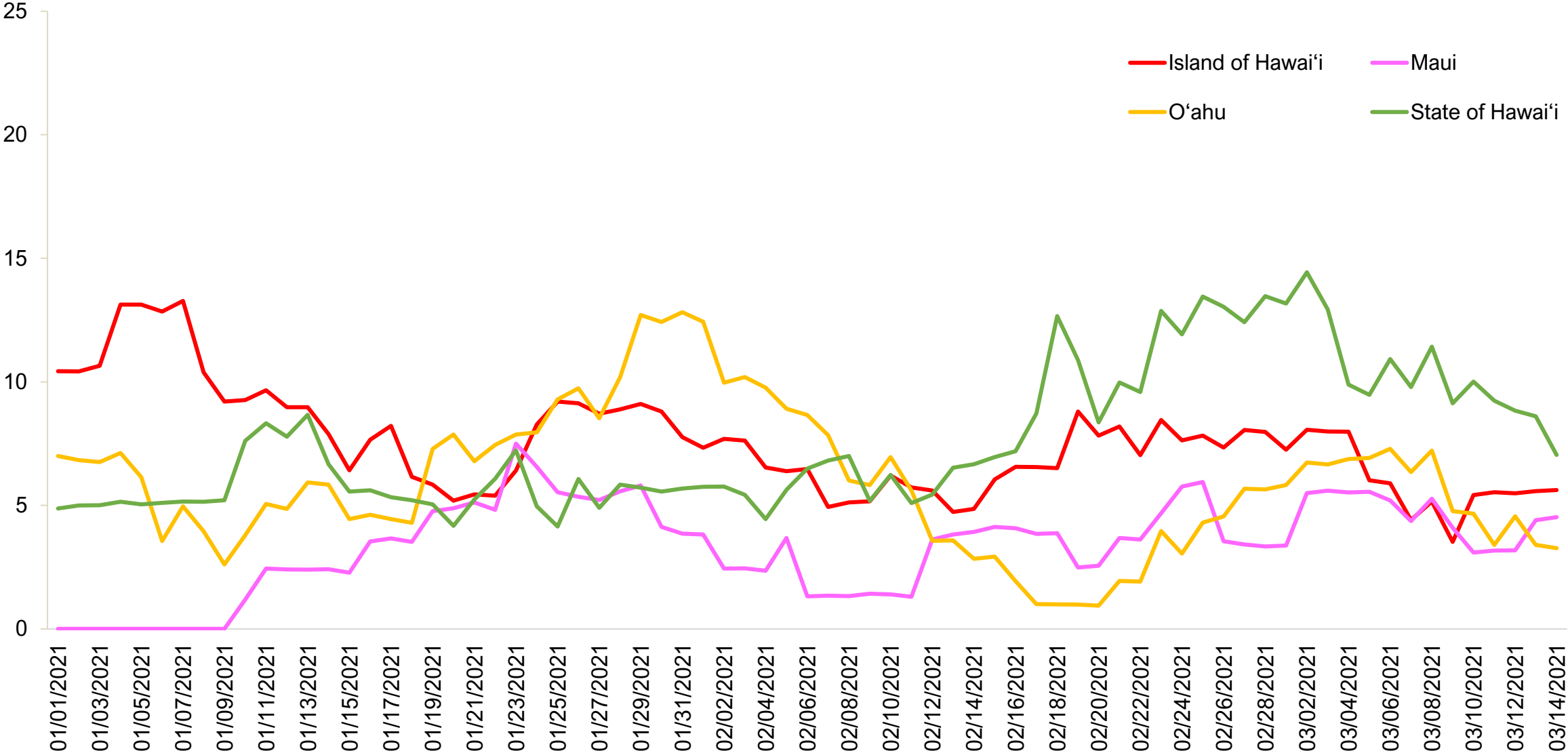
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Index of Japan Recommend Net Score Two-Week Moving Average



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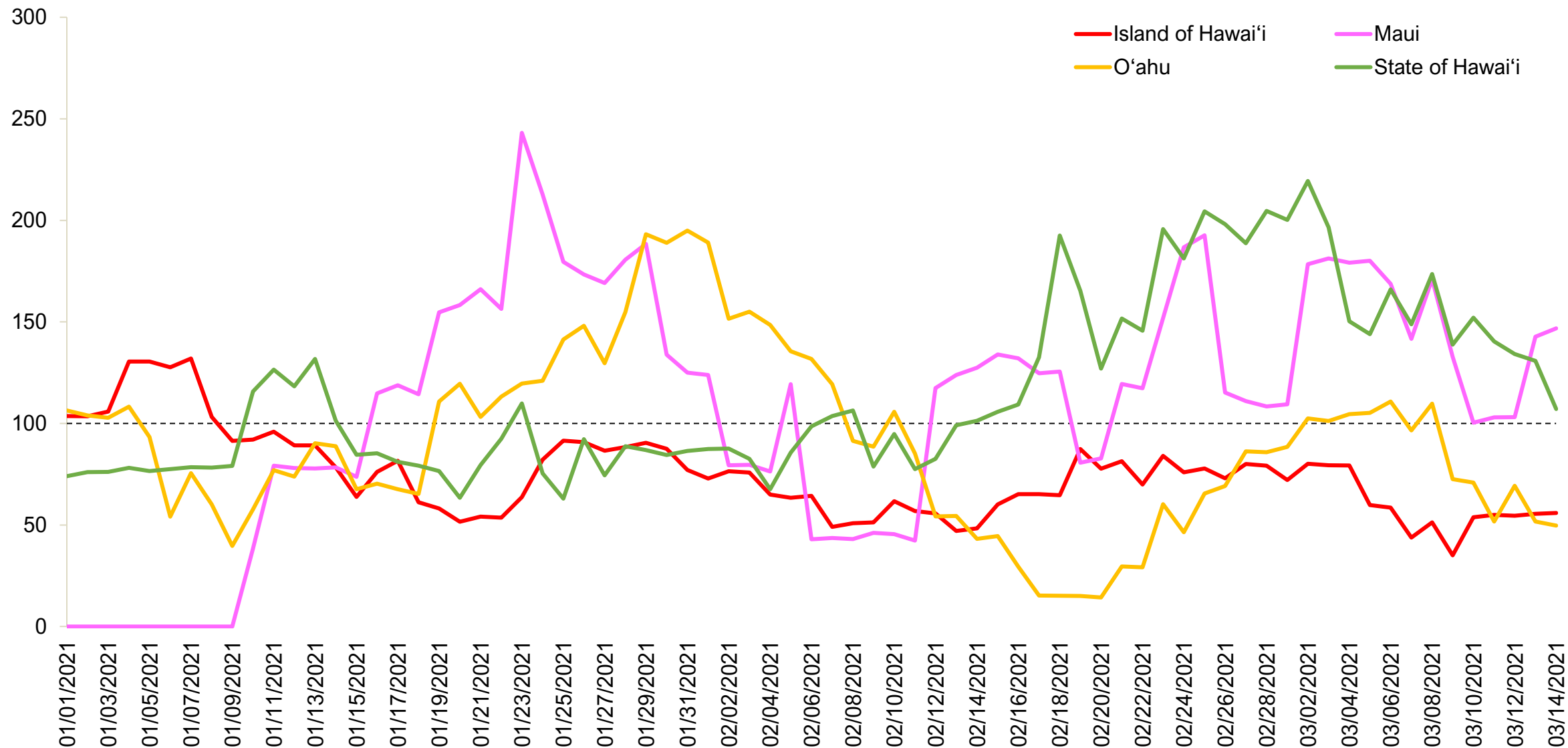
Japan Word of Mouth Exposure (% Yes) Two-Week Moving Average



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?)

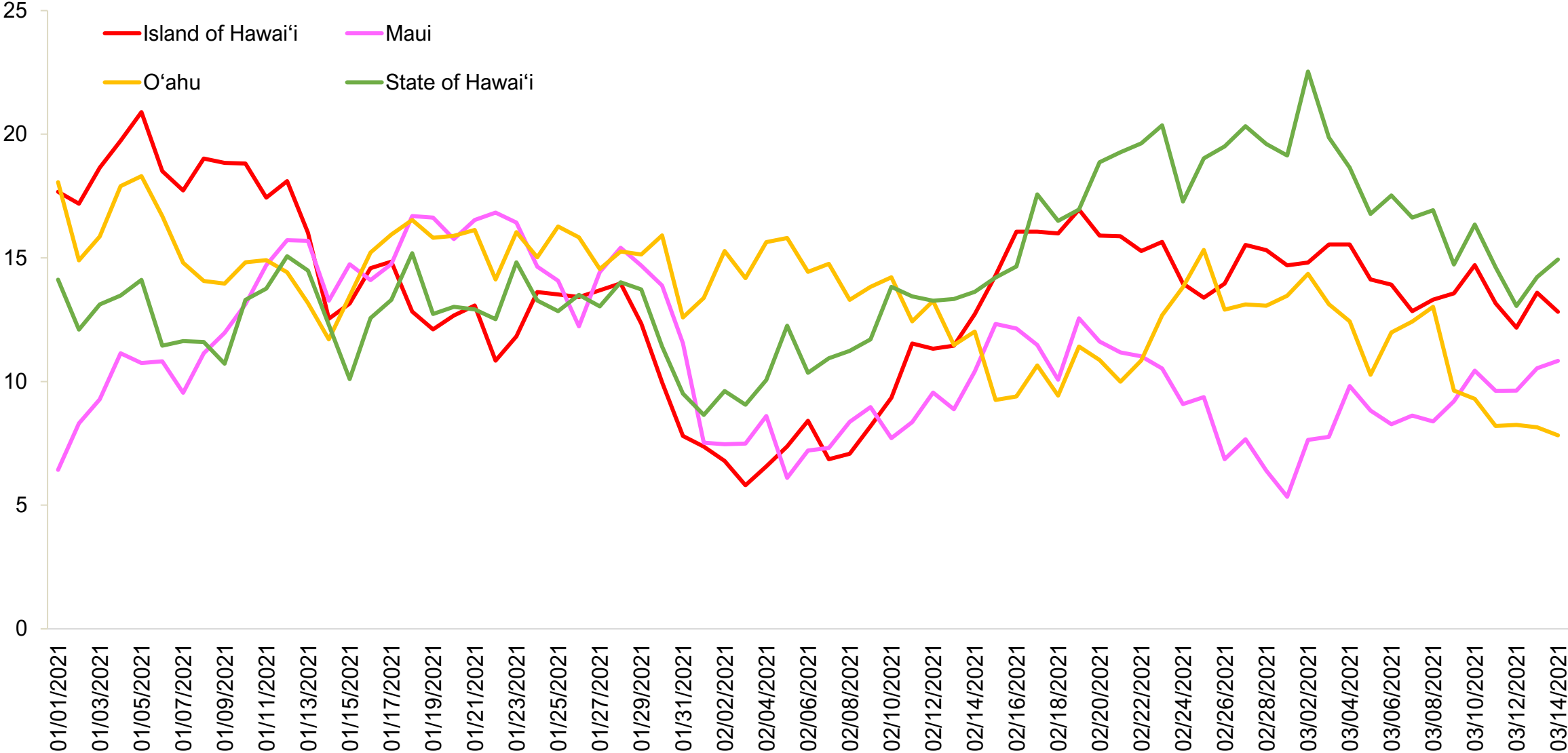
**Kaua'i is not included due to low response volume*

Index of Japan 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?)

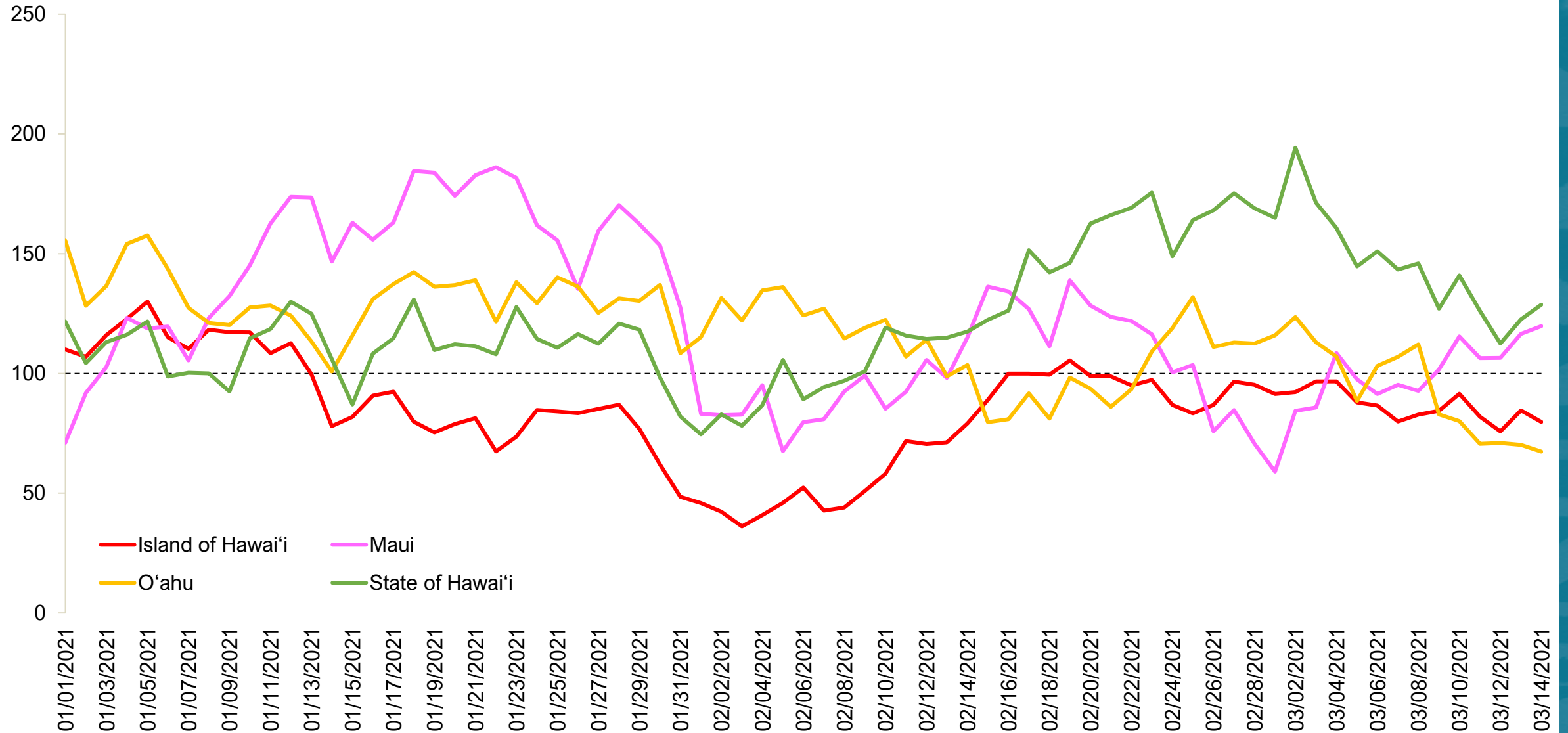
Japan Consideration (% Yes) Two-Week Moving Average



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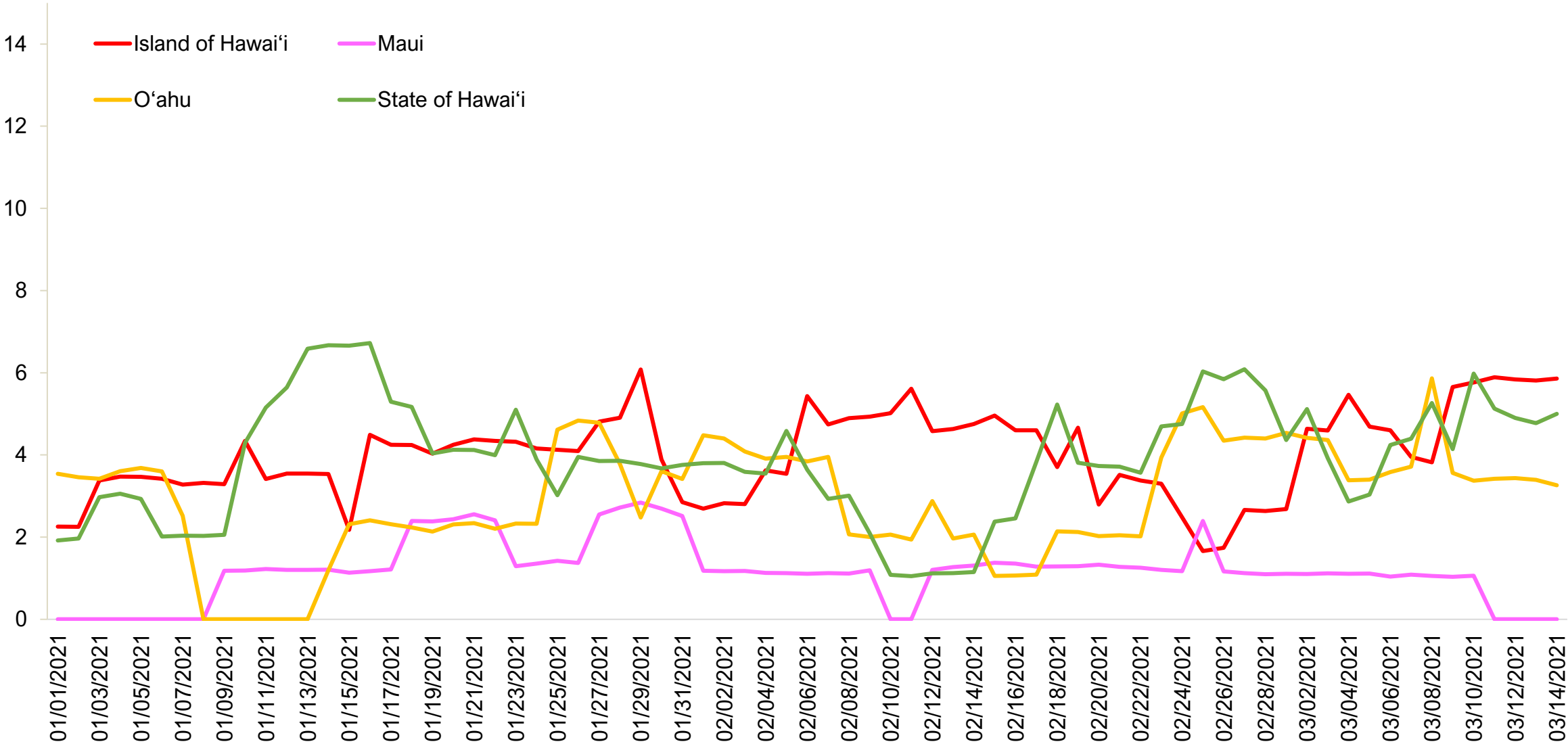
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Index of Japan Consideration (% Yes) Two-Week Moving Average



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?

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

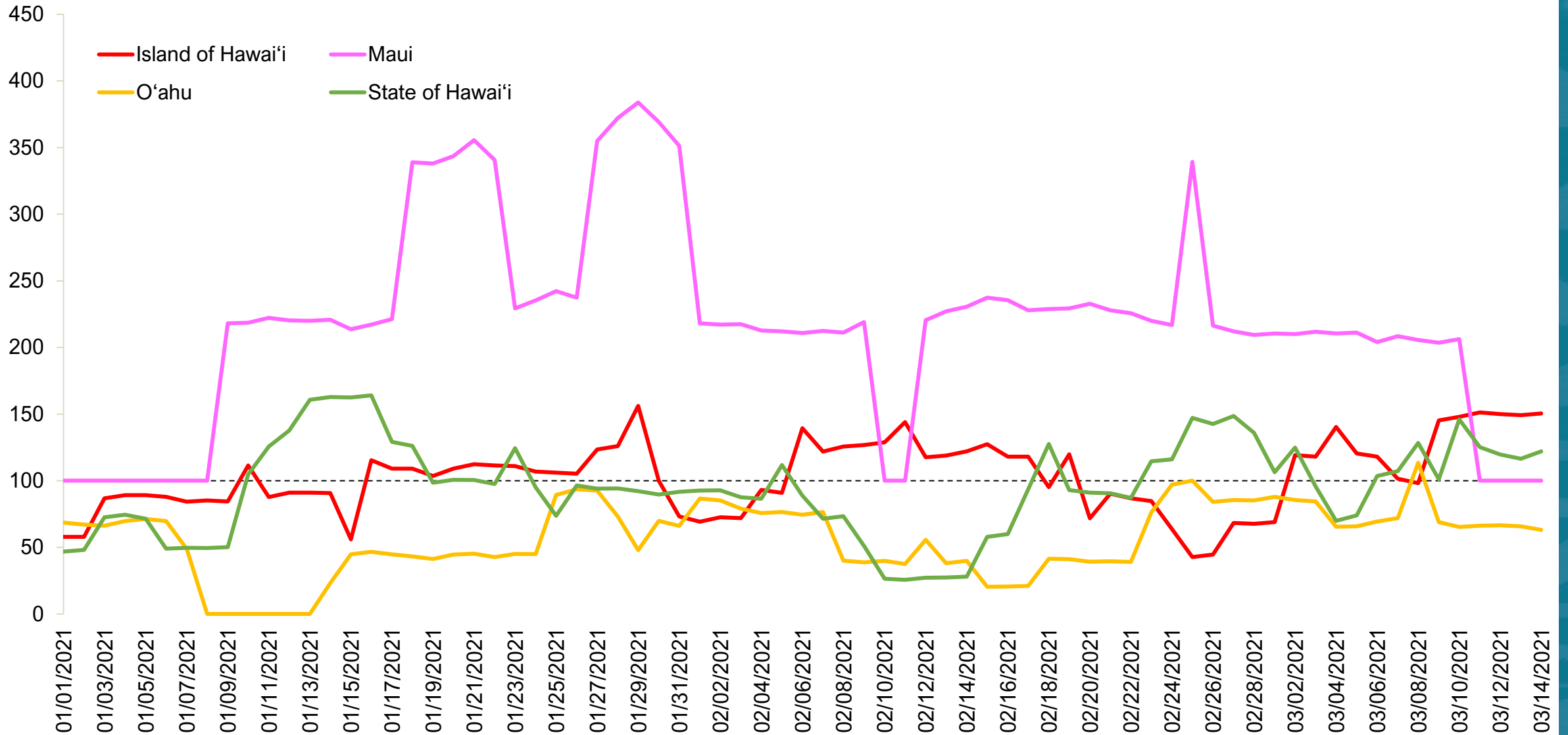


Question: (Net) Of the destinations considered, which are you most likely to visit?

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Source: YouGov data as of March 14, 2021

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

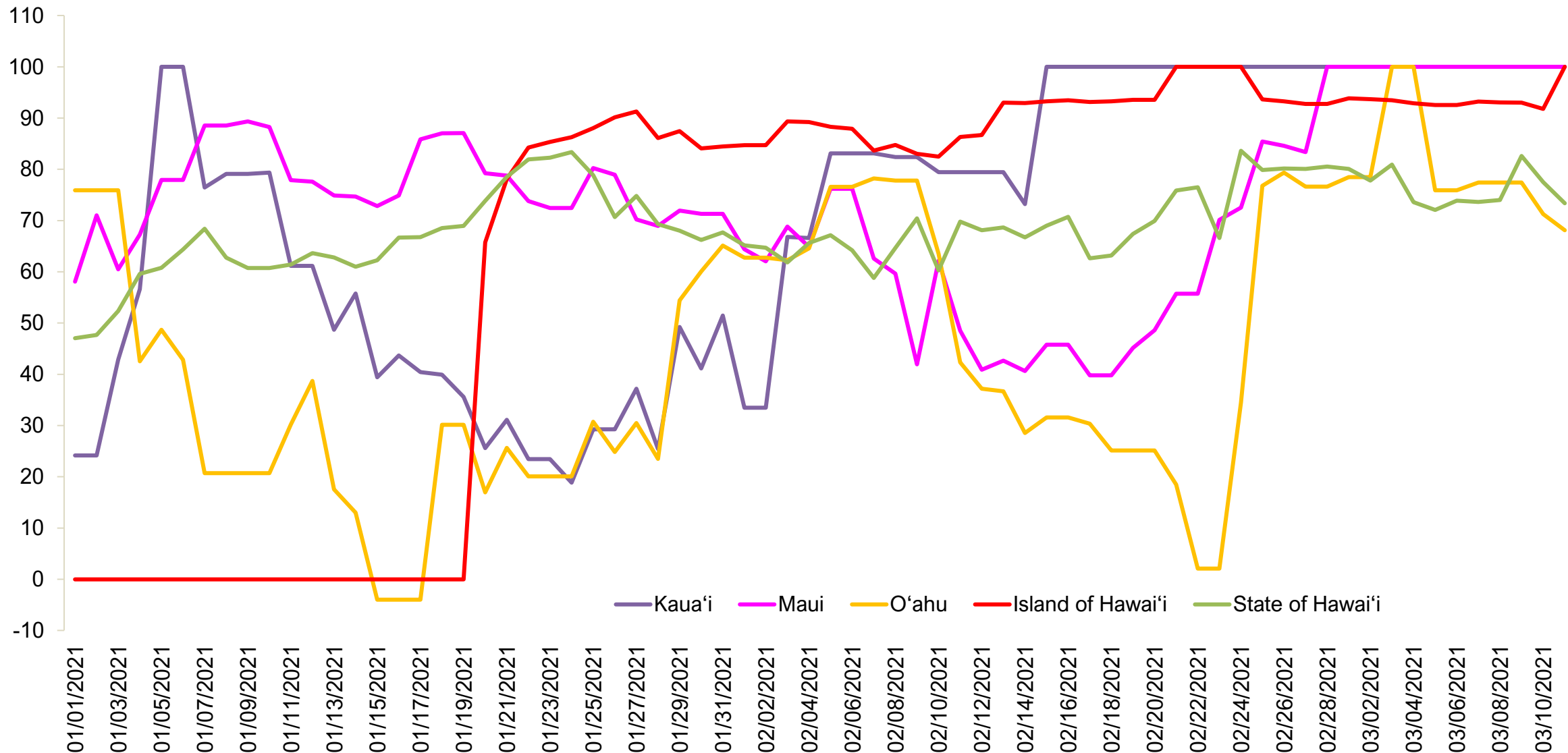


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Canada Destination Index Trends



Canada Buzz Net Score Two-Week Moving Average

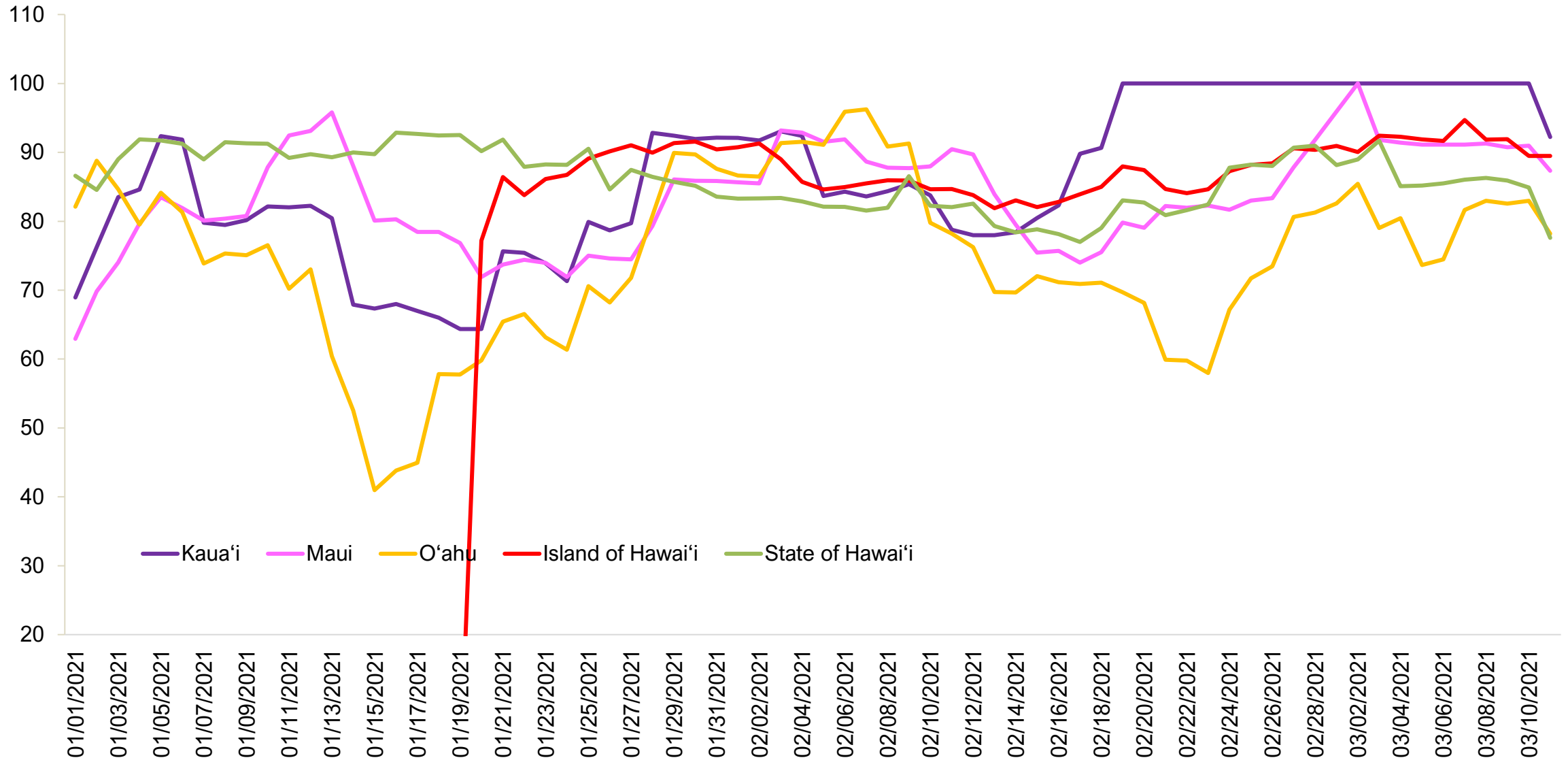


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**Island of Hawai'i data not available until 1/20/2021*

Source: YouGov data as of March 14, 2021

Canada Recommend Net Score Two-Week Moving Average

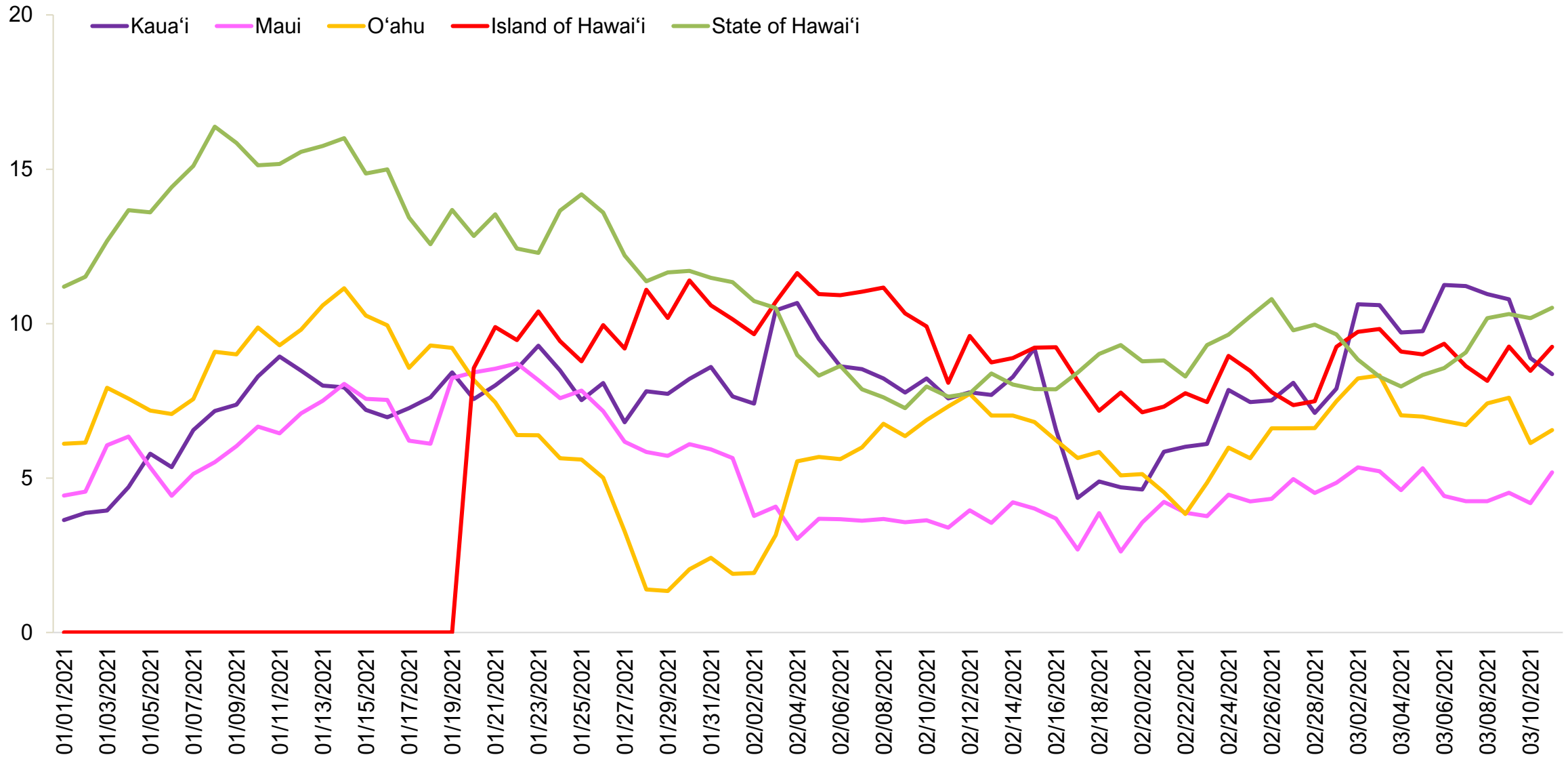


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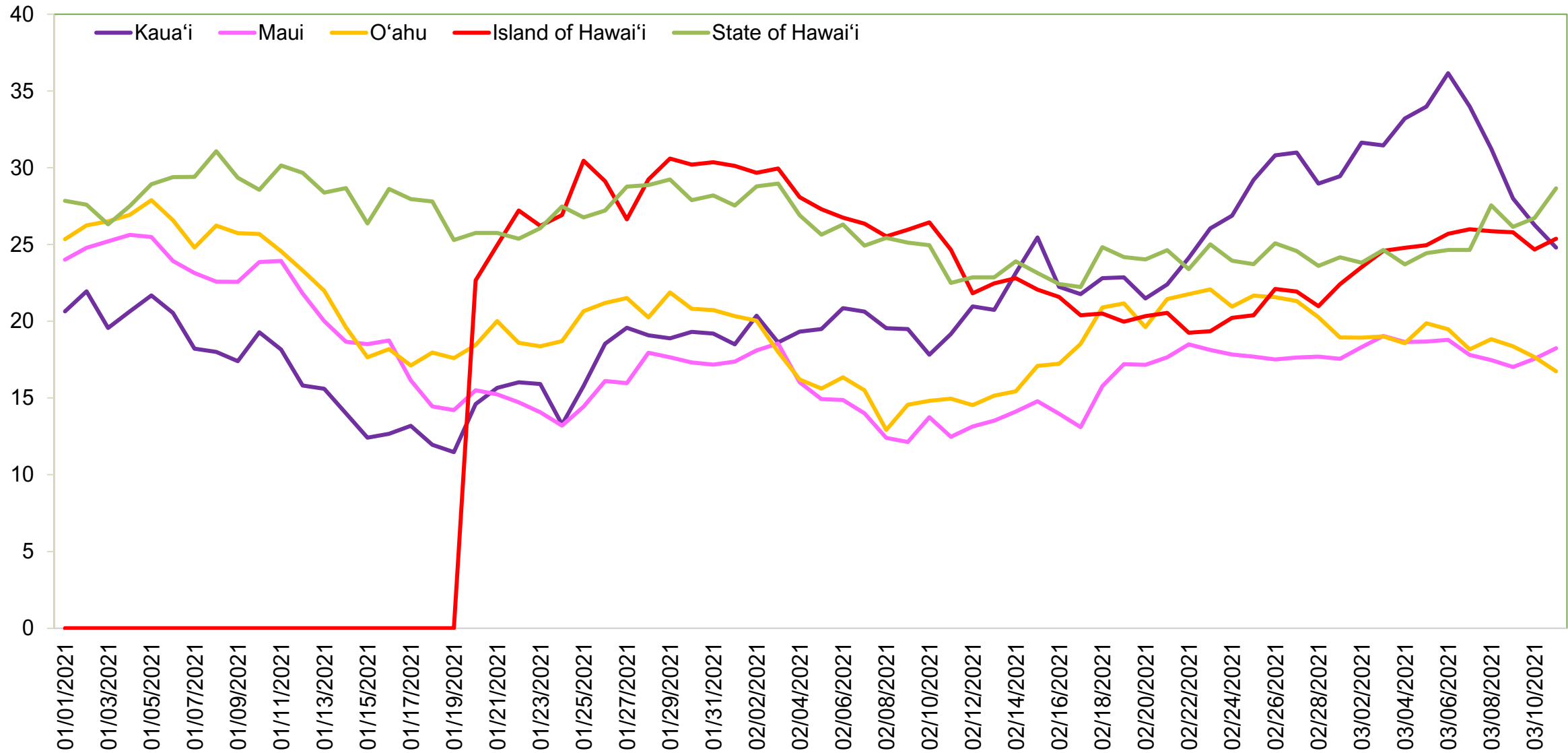
Source: YouGov data as of March 14, 2021

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?)

Canada Consideration (% Yes) Two-Week Moving Average

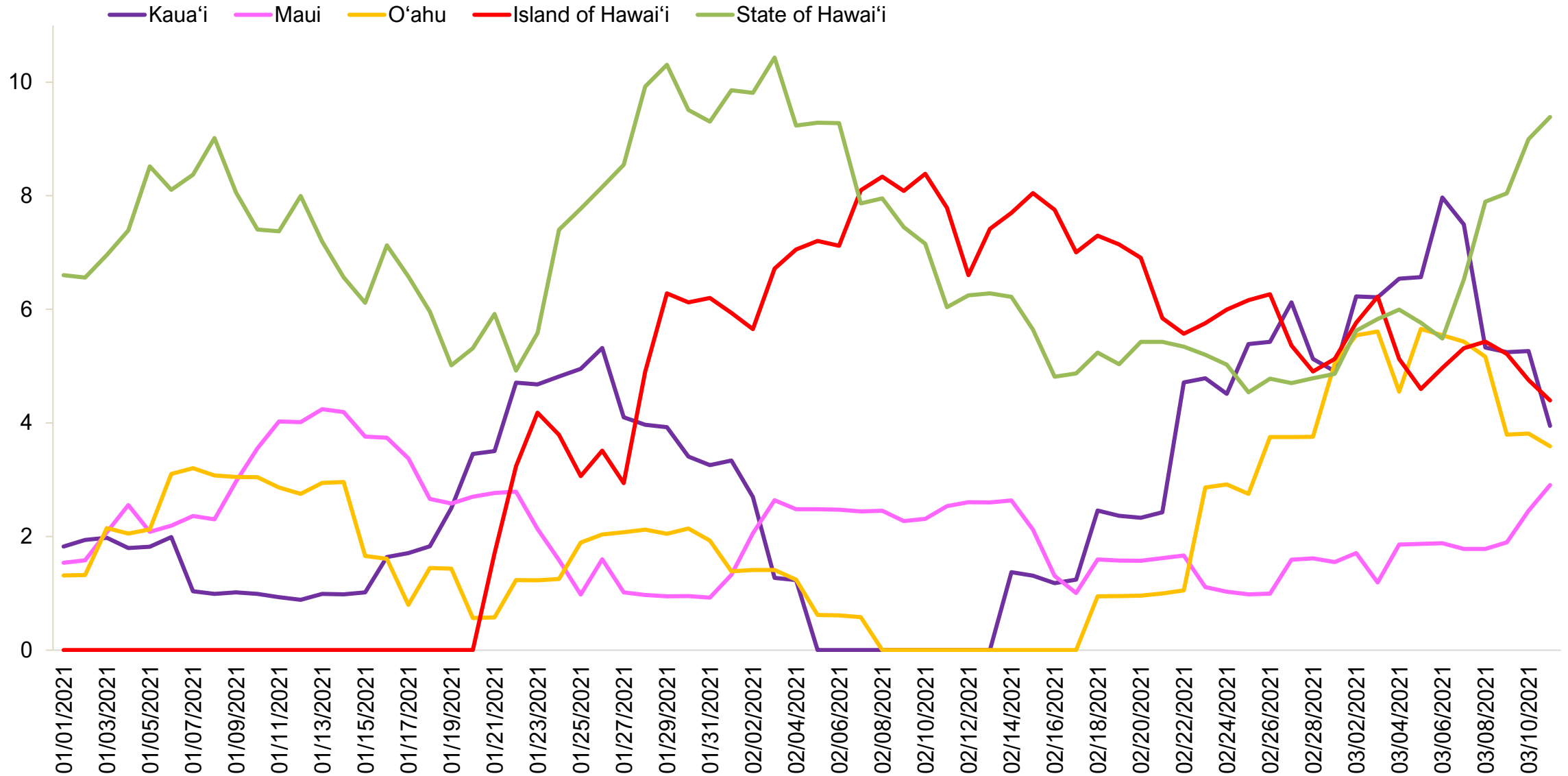


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