

# YouGov Destination Index Trends

September 27, 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. 1<sup>st</sup>

**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. 11<sup>th</sup>

**September 16, 2020** – pre-travel testing program launch pushed to Oct. 15<sup>th</sup>

**November 24, 2020** – Kaua'i County announces they will opt out of Safe Travels program starting Dec. 2<sup>nd</sup>

**September 16, 2020** – 14-day quarantine requirement for interisland travelers lifted

**July 13, 2020** – pre-travel testing program launch pushed back to Sept. 1<sup>st</sup>

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

**September 6, 2020** – pre-travel testing program launch pushed back to Oct. 1<sup>st</sup>, 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. 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.

**August 23, 2021** – Gov. Ige announces "Now's not a good time to visit Hawai'i."

**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

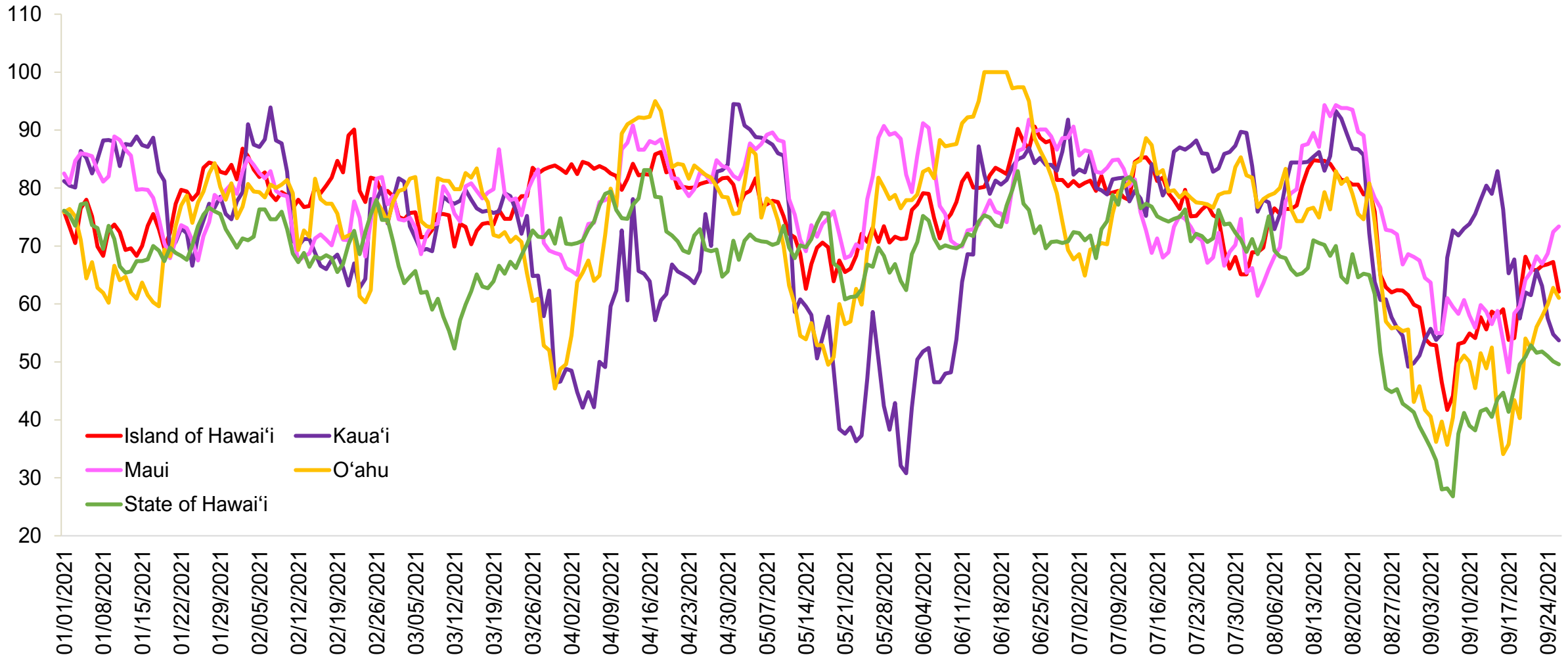
**June 24, 2021** – Gov. Ige announces that individuals vaccinated in the U.S. will be able to bypass the testing/quarantine requirement with proof of vaccination through the state's Safe Travels program

# U.S. Destination Index Trends





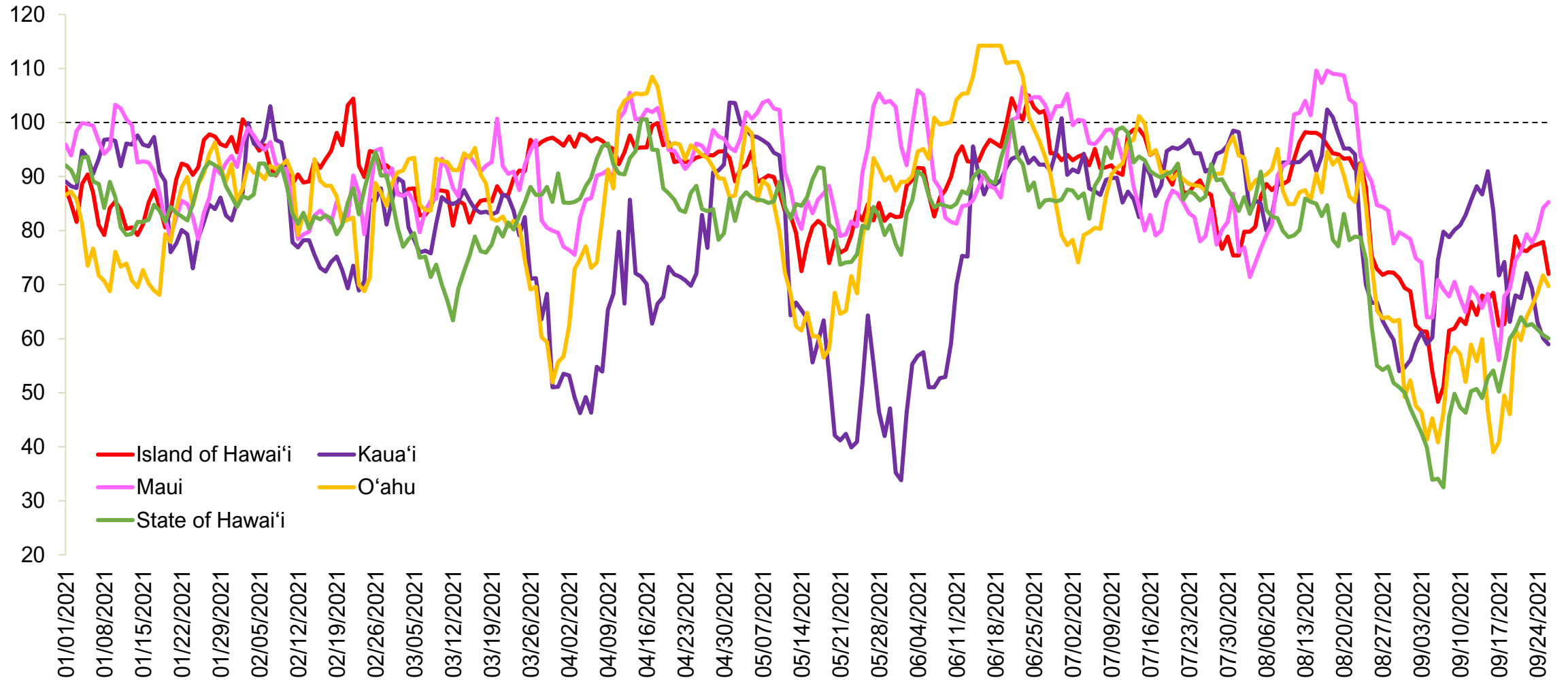
# U.S. Buzz Net Score Two-Week Moving Average



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

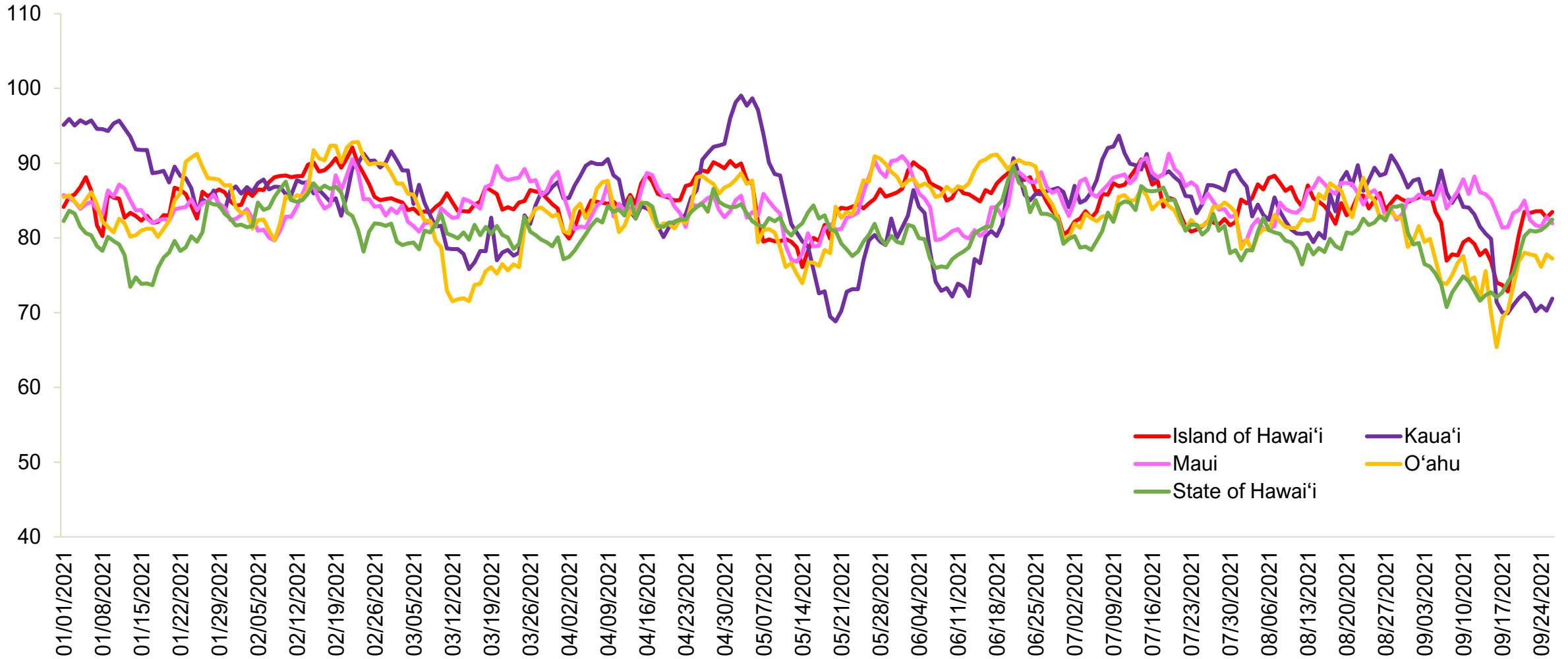
# Index of U.S. Buzz Net Score Two-Week Moving Average



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?

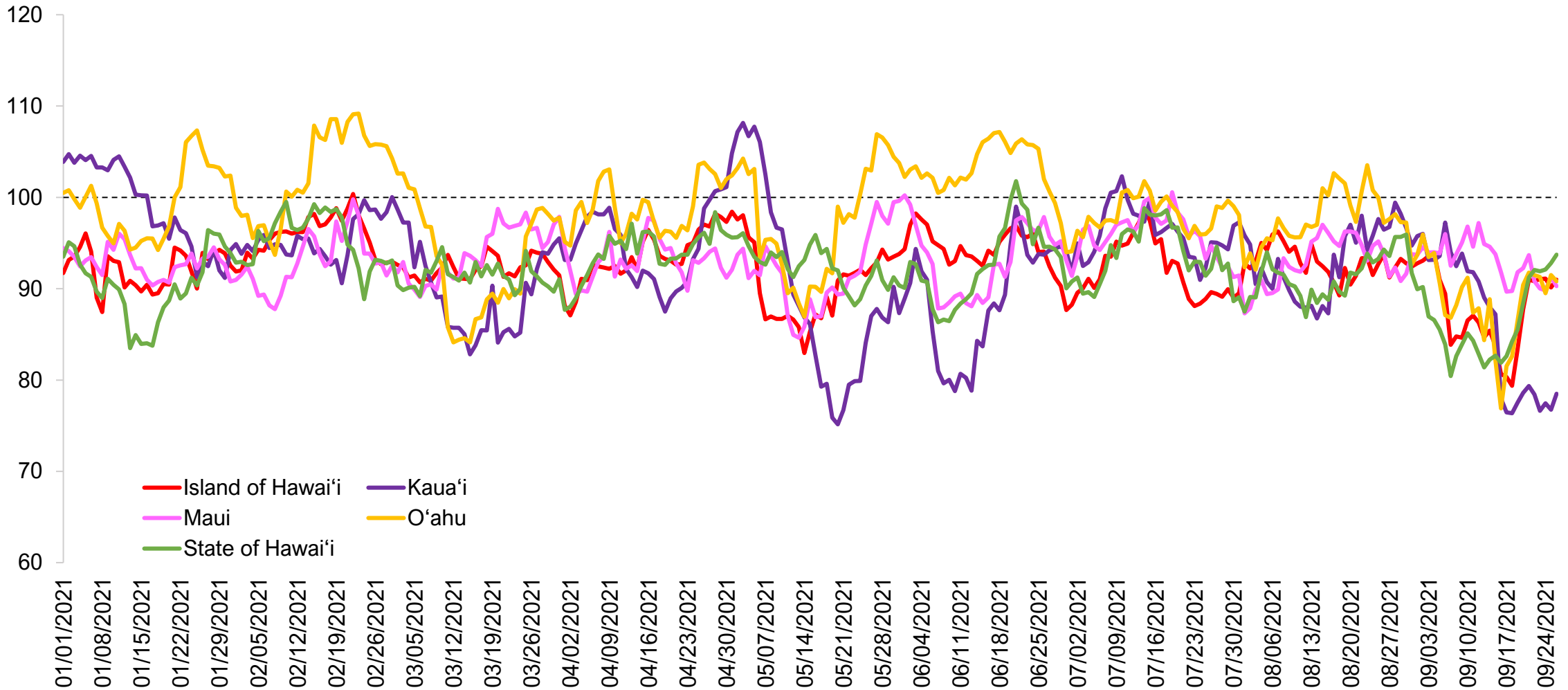


# U.S. Recommend Net Score Two-Week Moving Average



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?

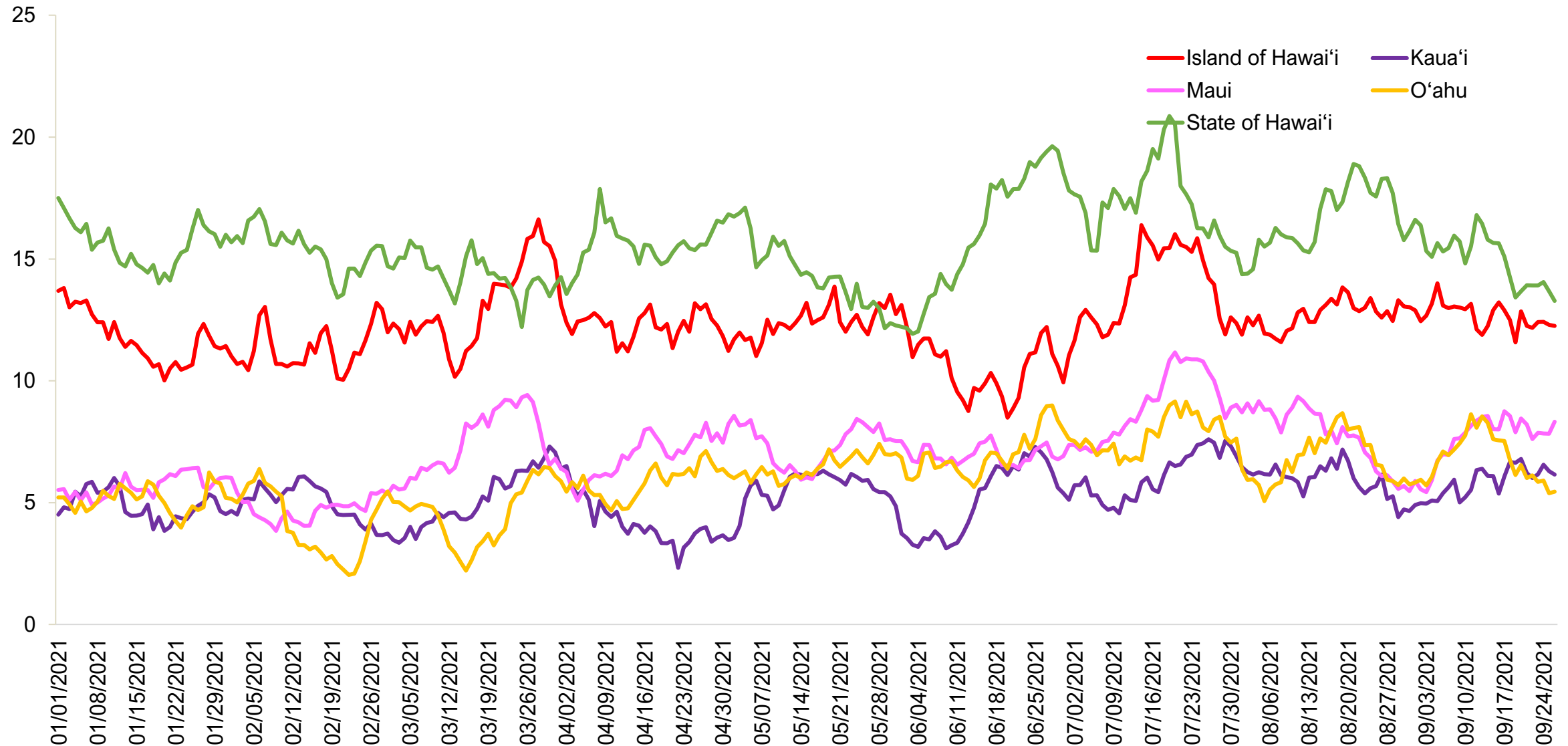
# Index of U.S. Recommend Net Score Two-Week Moving Average



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 September 6, 2021

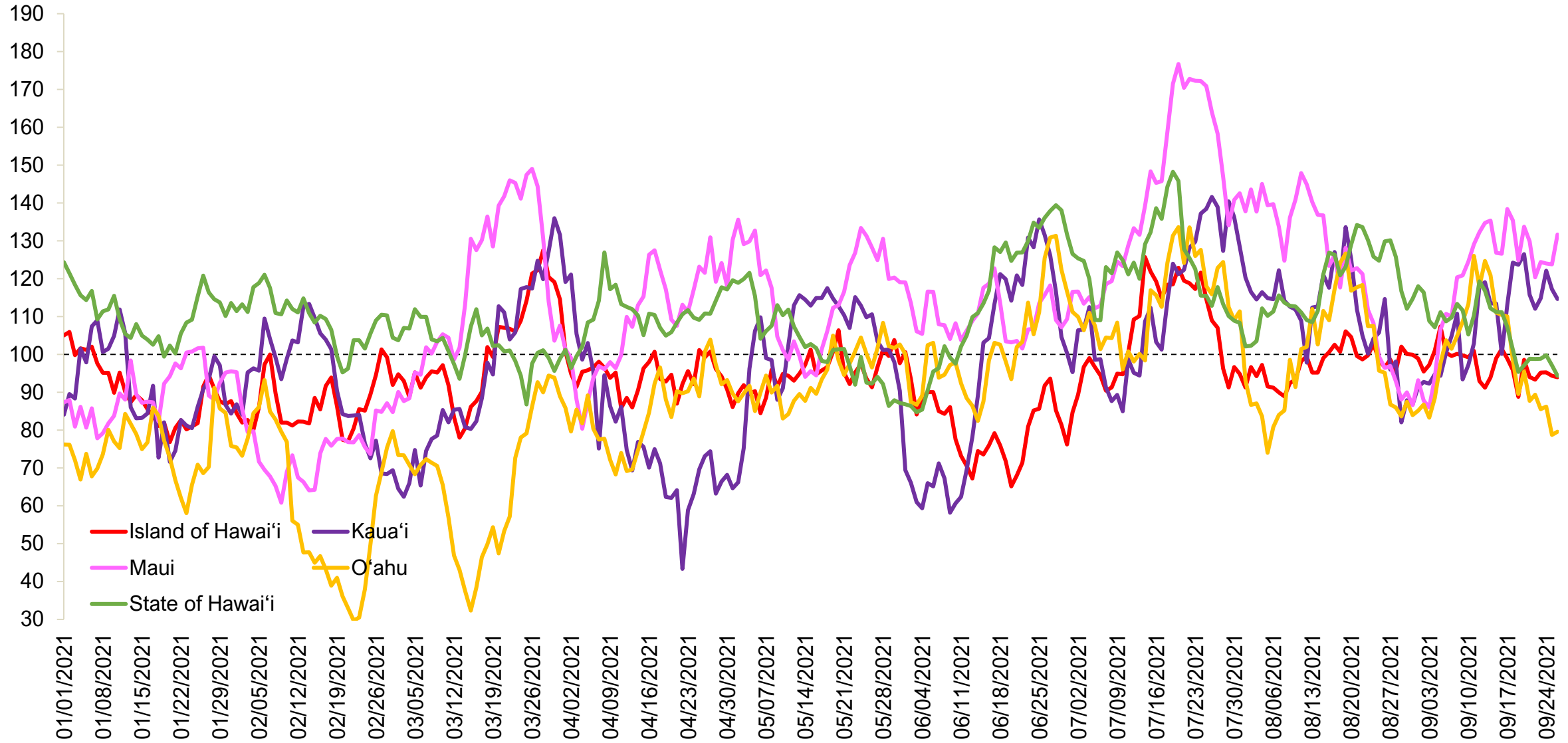
# U.S. Word of Mouth Exposure (% Yes) Two-Week Moving Average



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?)

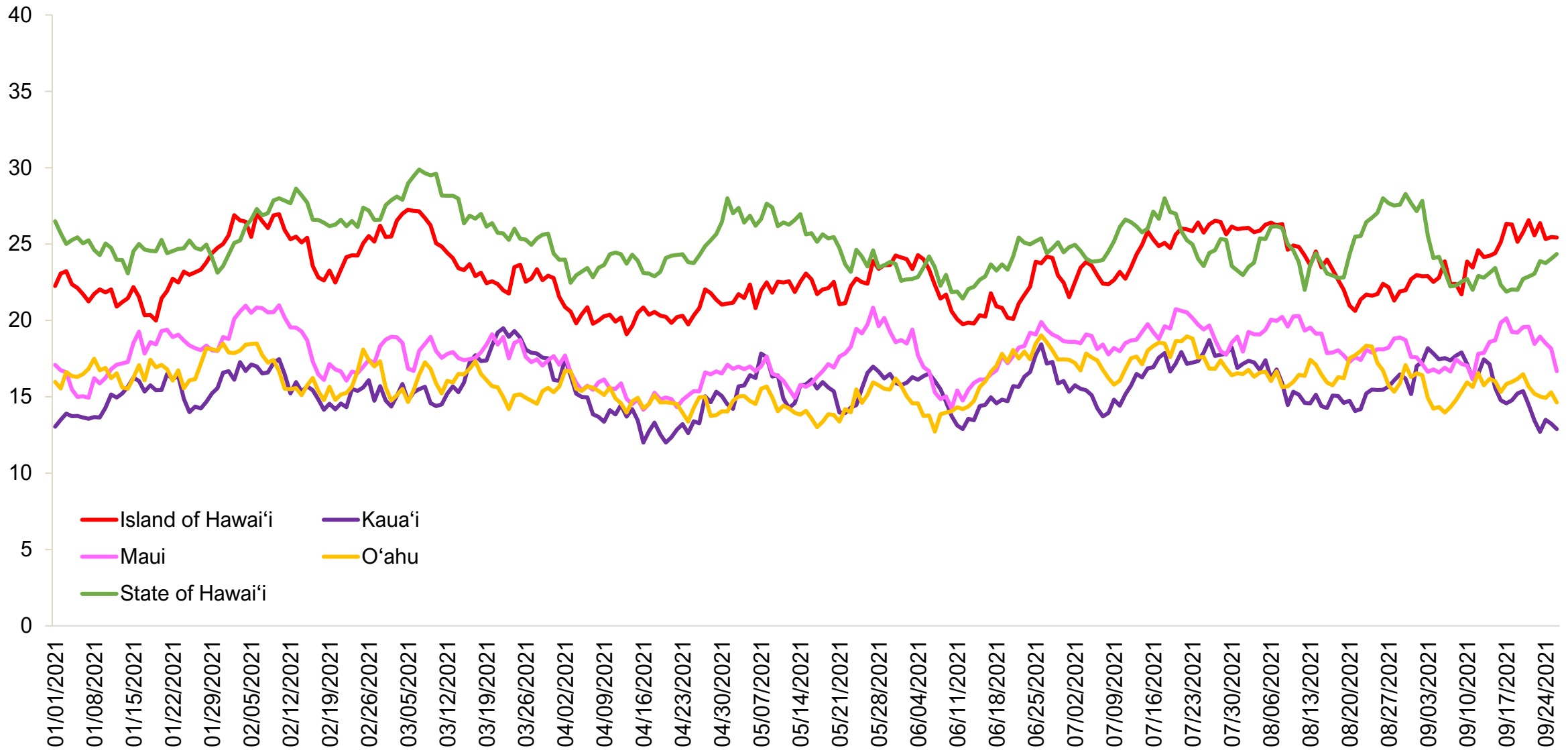
Source: YouGov data as of September 6, 2021

# 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?)

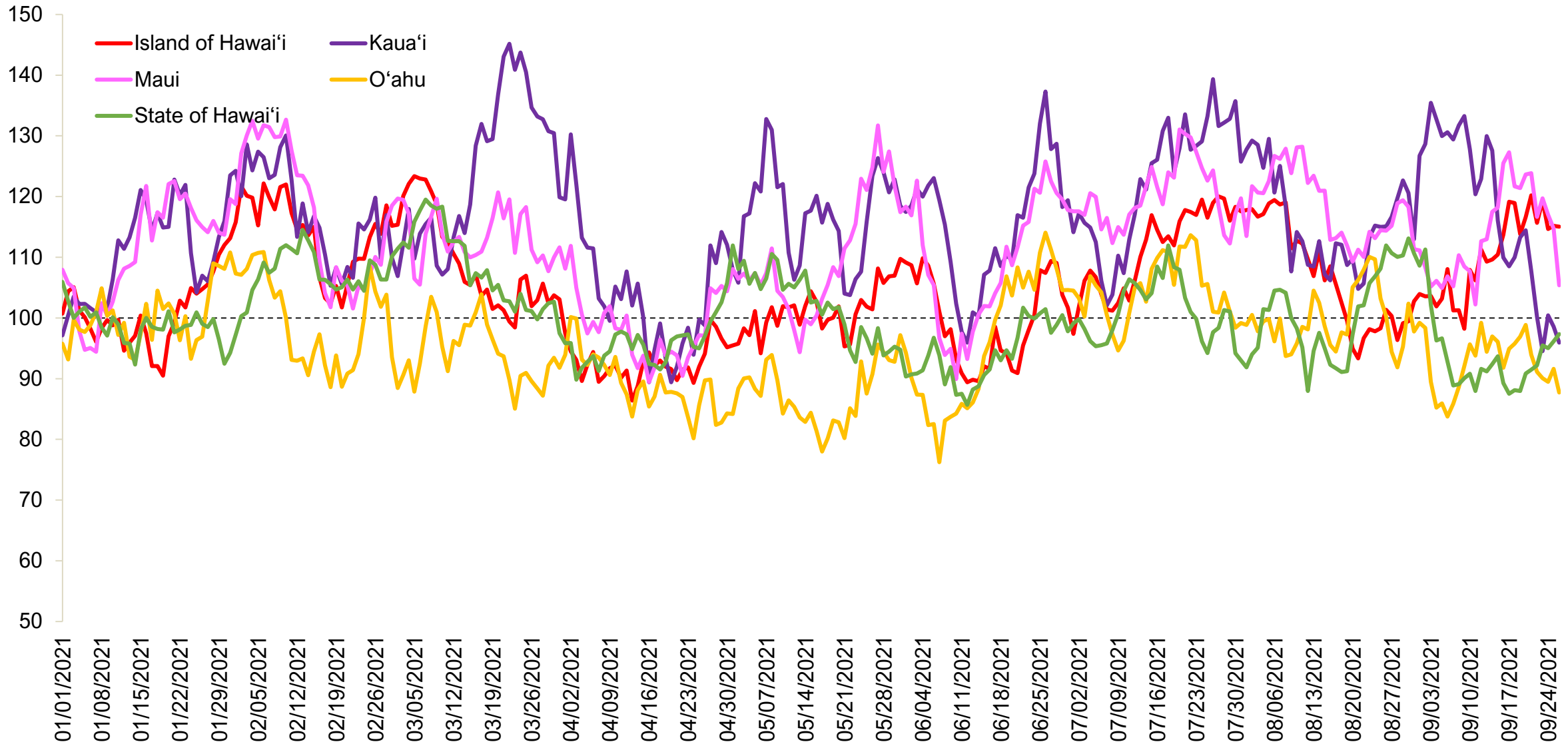
# U.S. Consideration (% Yes) Two-Week Moving Average



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?

Source: YouGov data as of September 6, 2021

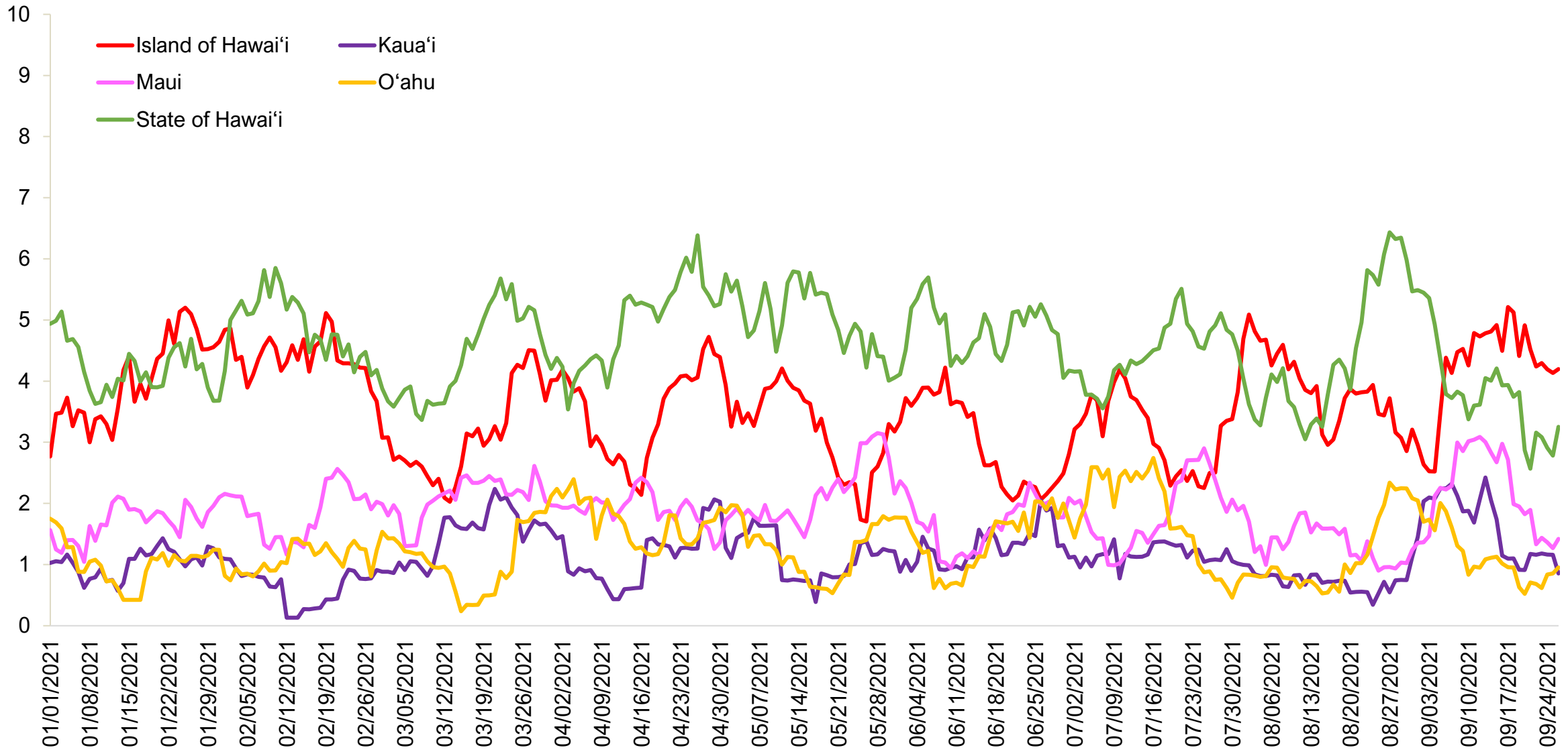
# Index of U.S. Consideration (% Yes) Two-Week Moving Average



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?



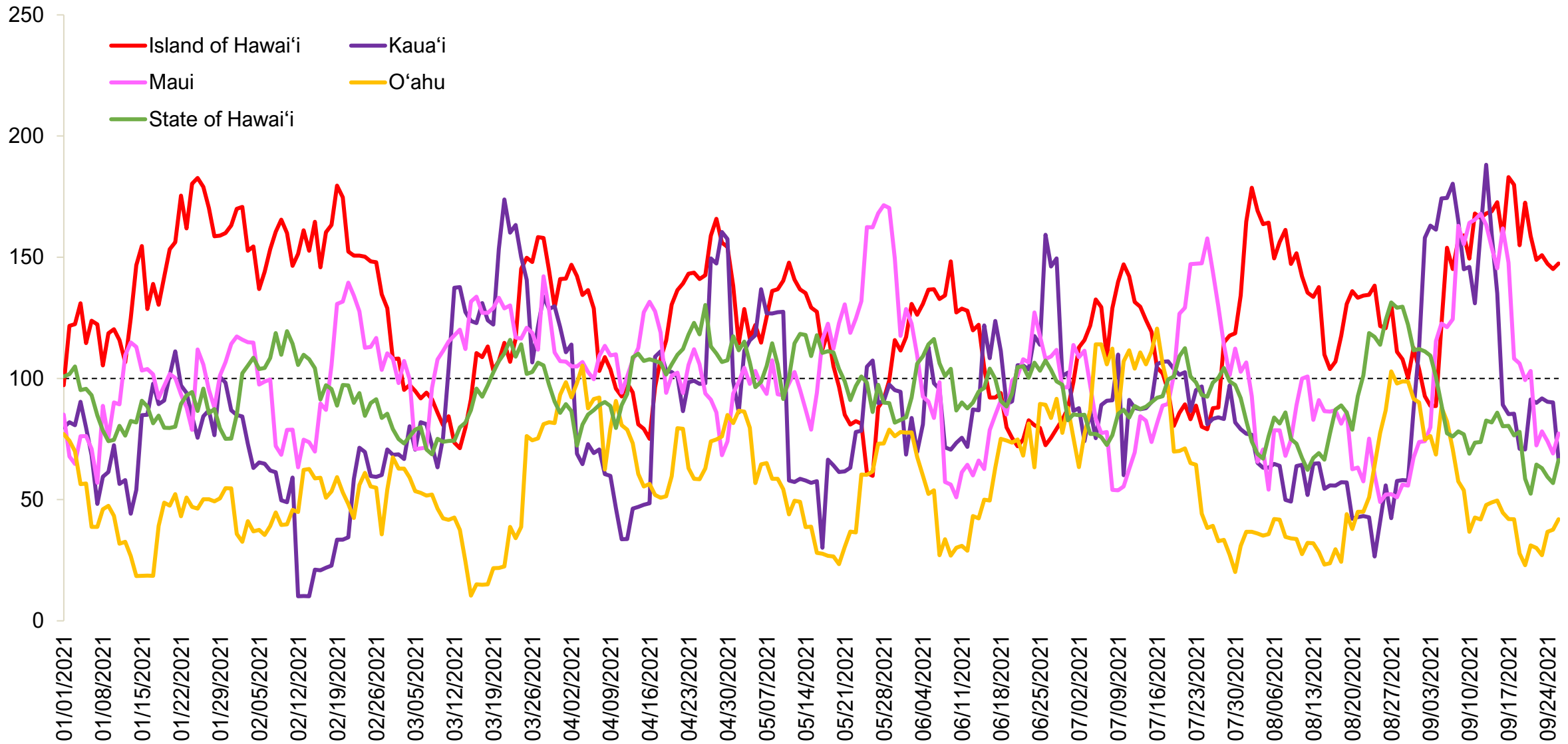
# U.S. Purchase Intent (% Yes) Two-Week Moving Average



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

Source: YouGov data as of September 6, 2021

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



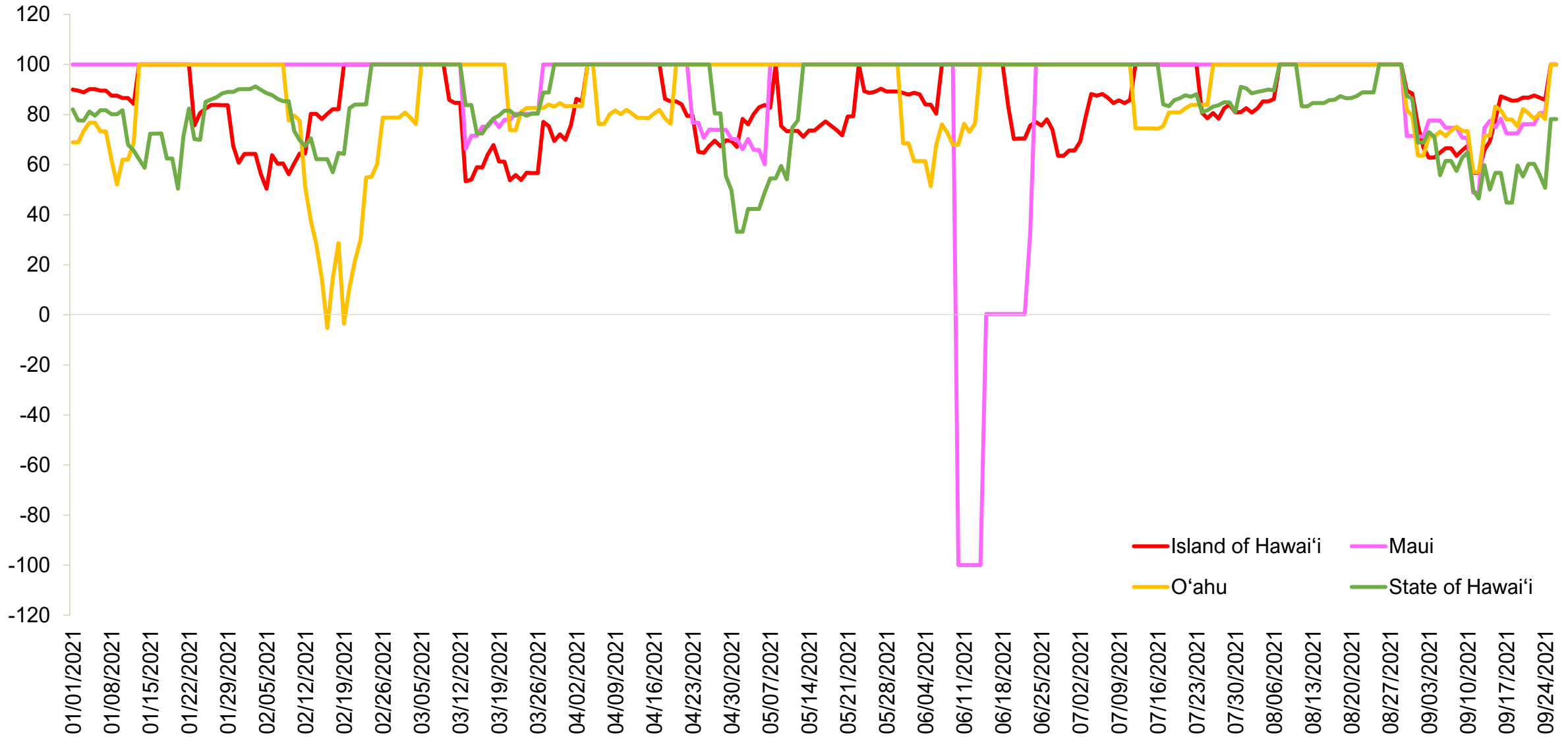
Question: (Net) Of the destinations considered, which are you most likely to visit?

Source: YouGov data as of September 6, 2021

# Japan Destination Index Trends



# Japan Buzz Net Score Two-Week Moving Average

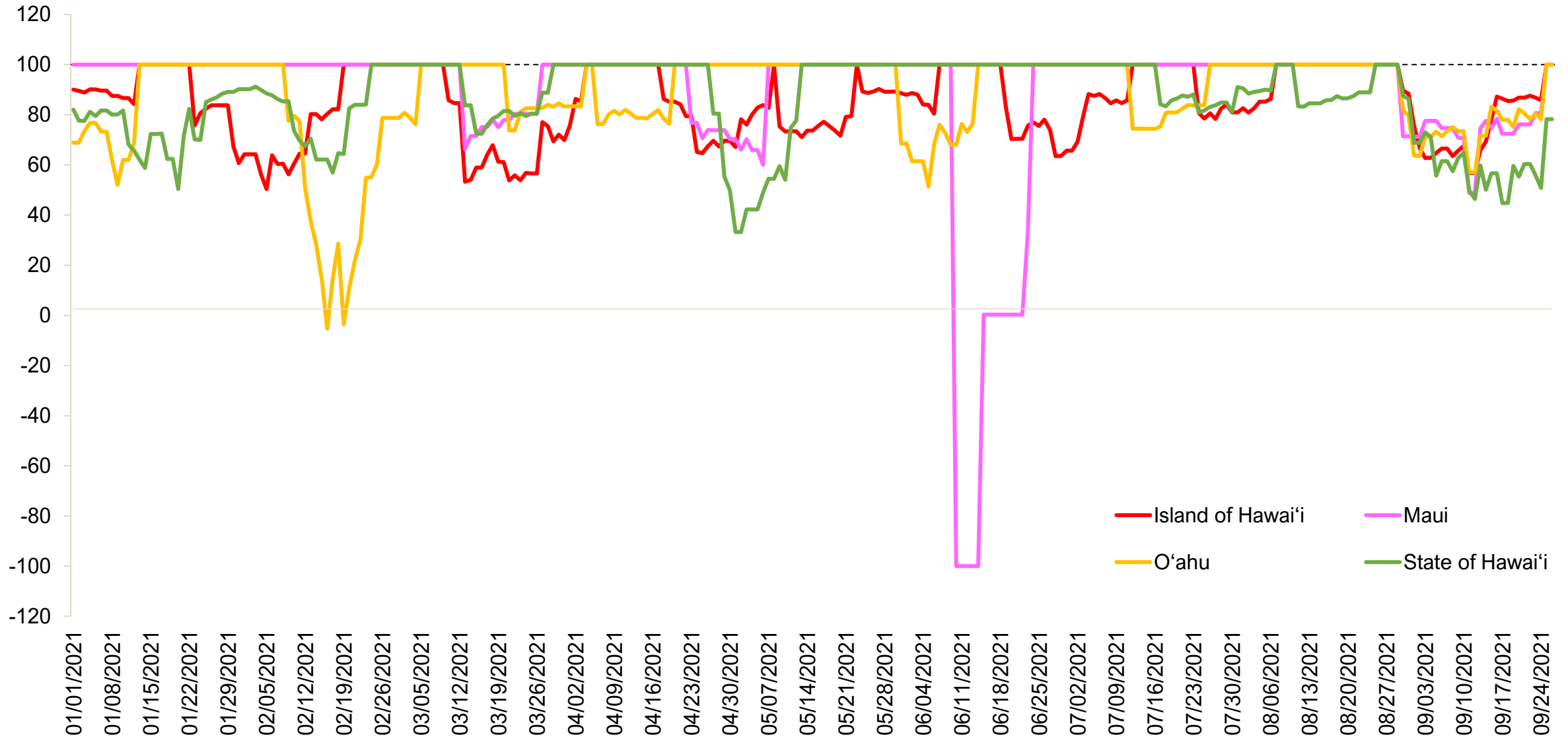


Question: (Net) Over the PAST TWO WEEKS, which of the following destinations have you heard something POSITIVE about (whether in the news, through advertising, or talking to friends and family)? / Now which of the following have you heard something NEGATIVE about over the PAST TWO WEEKS?

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

Source: YouGov data as of September 6, 2021

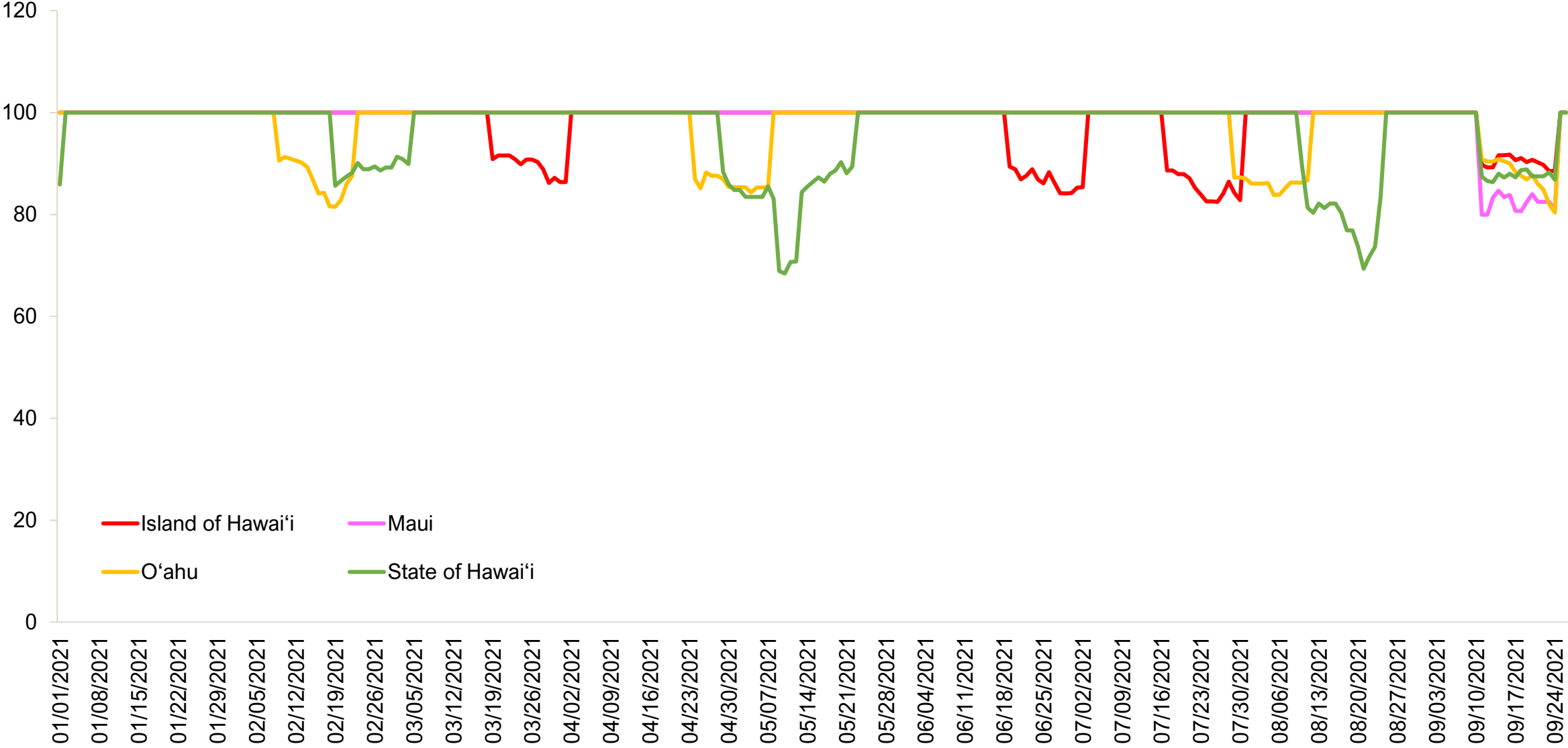
# Index of Japan Buzz Net Score Two-Week Moving Average



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

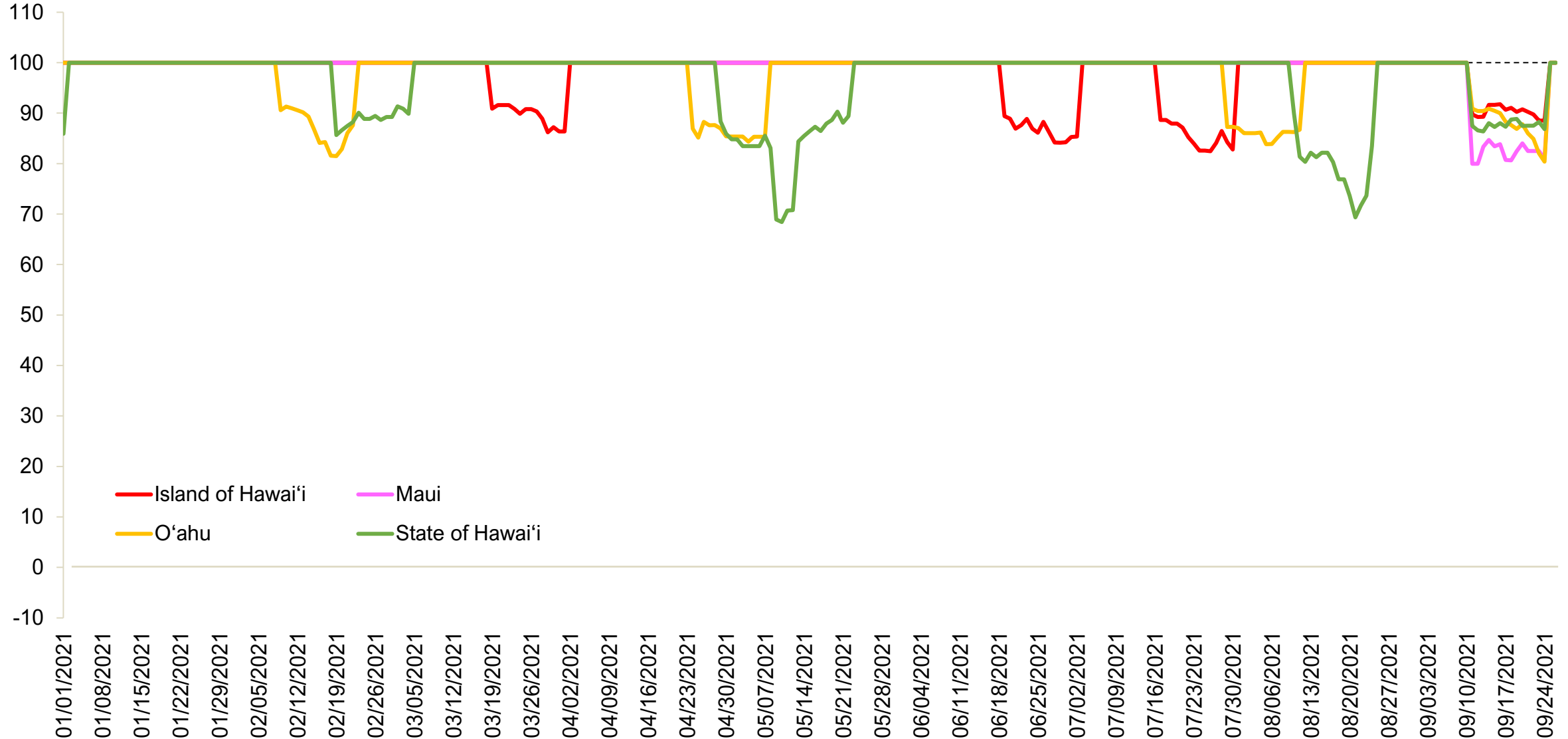
# Japan Recommend Net Score Two-Week Moving Average



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?

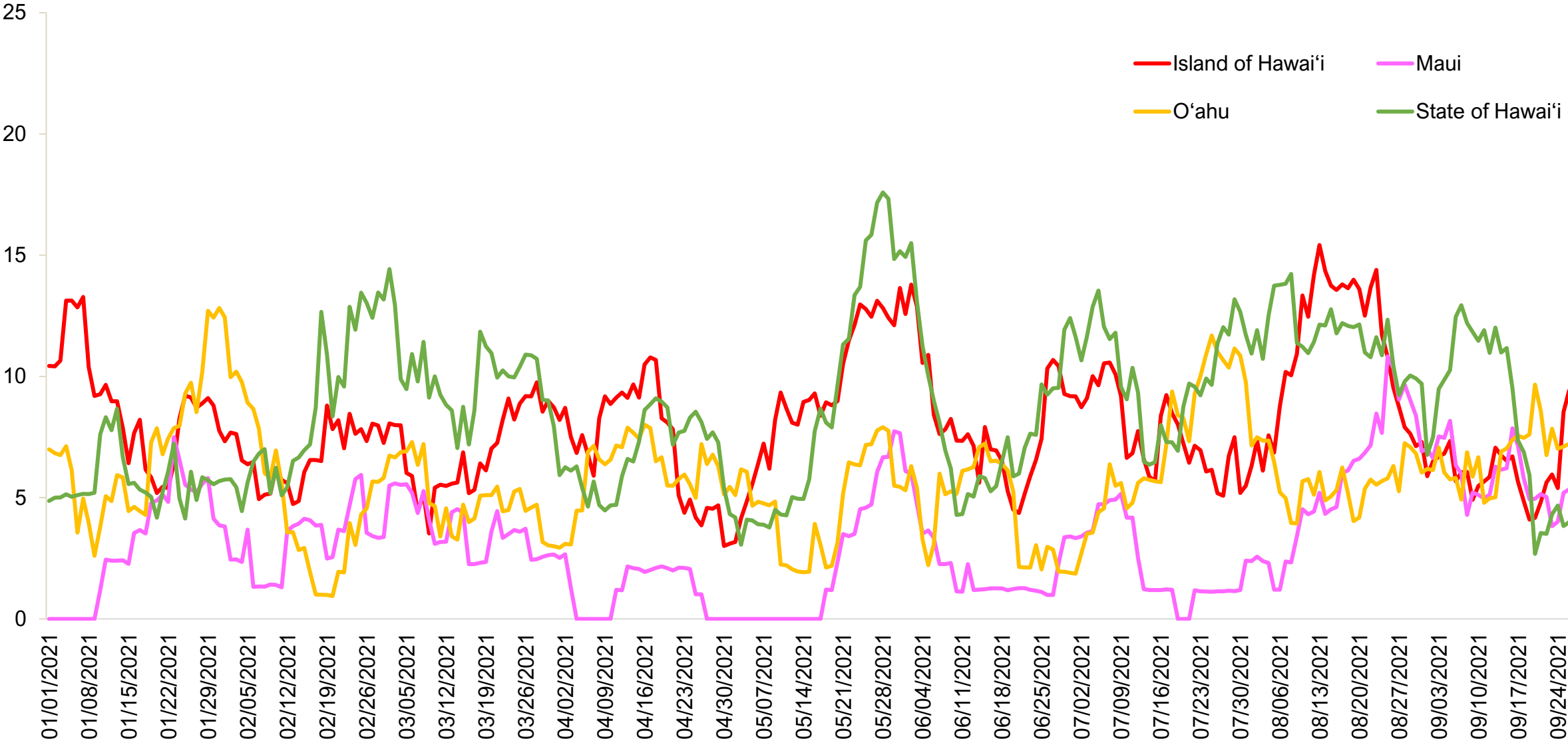


# Index of Japan Recommend Net Score Two-Week Moving Average



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?

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

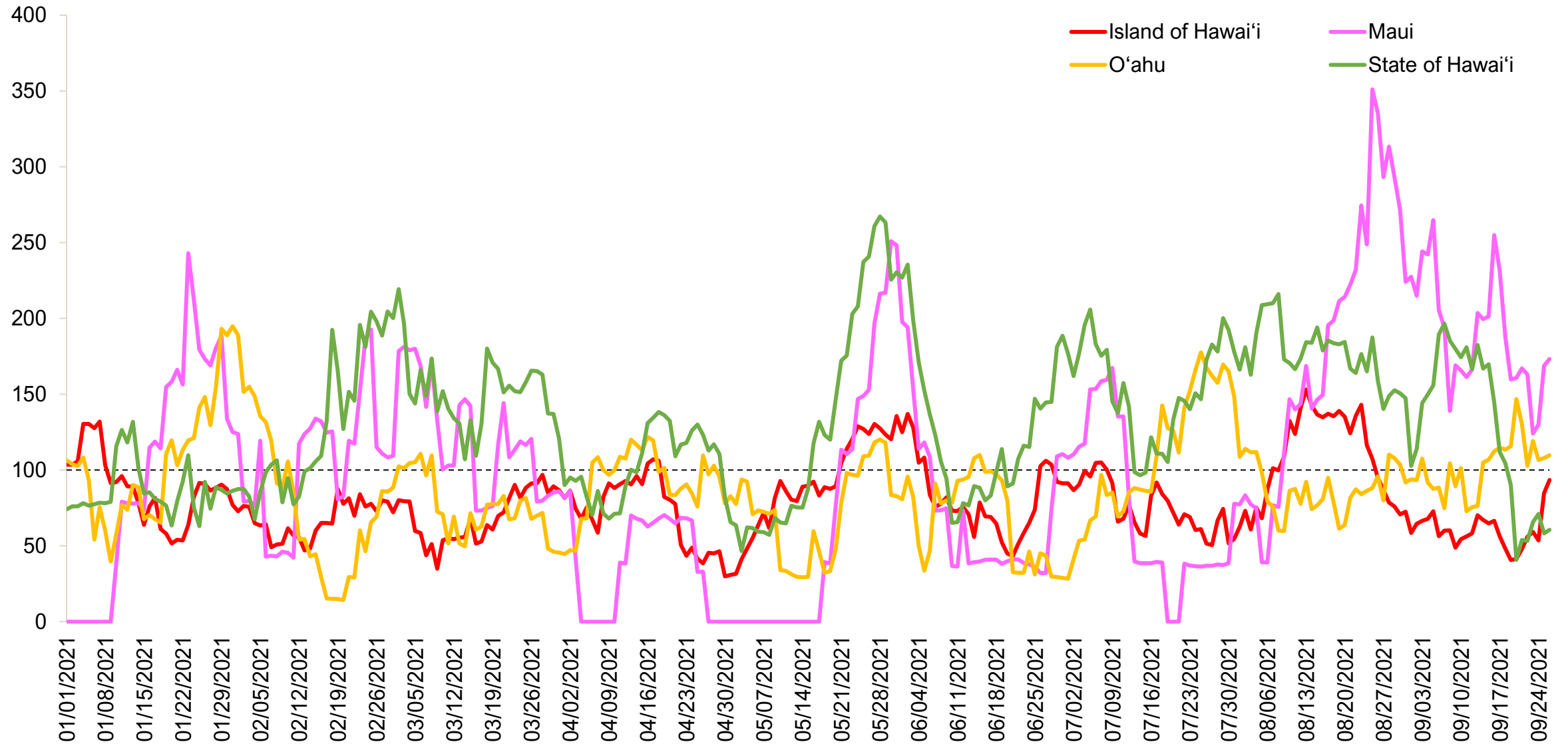


Question: (Net) Which of the following destinations have you talked about with friends and family in the PAST TWO WEEKS (whether in-person, online, or through social media?)

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

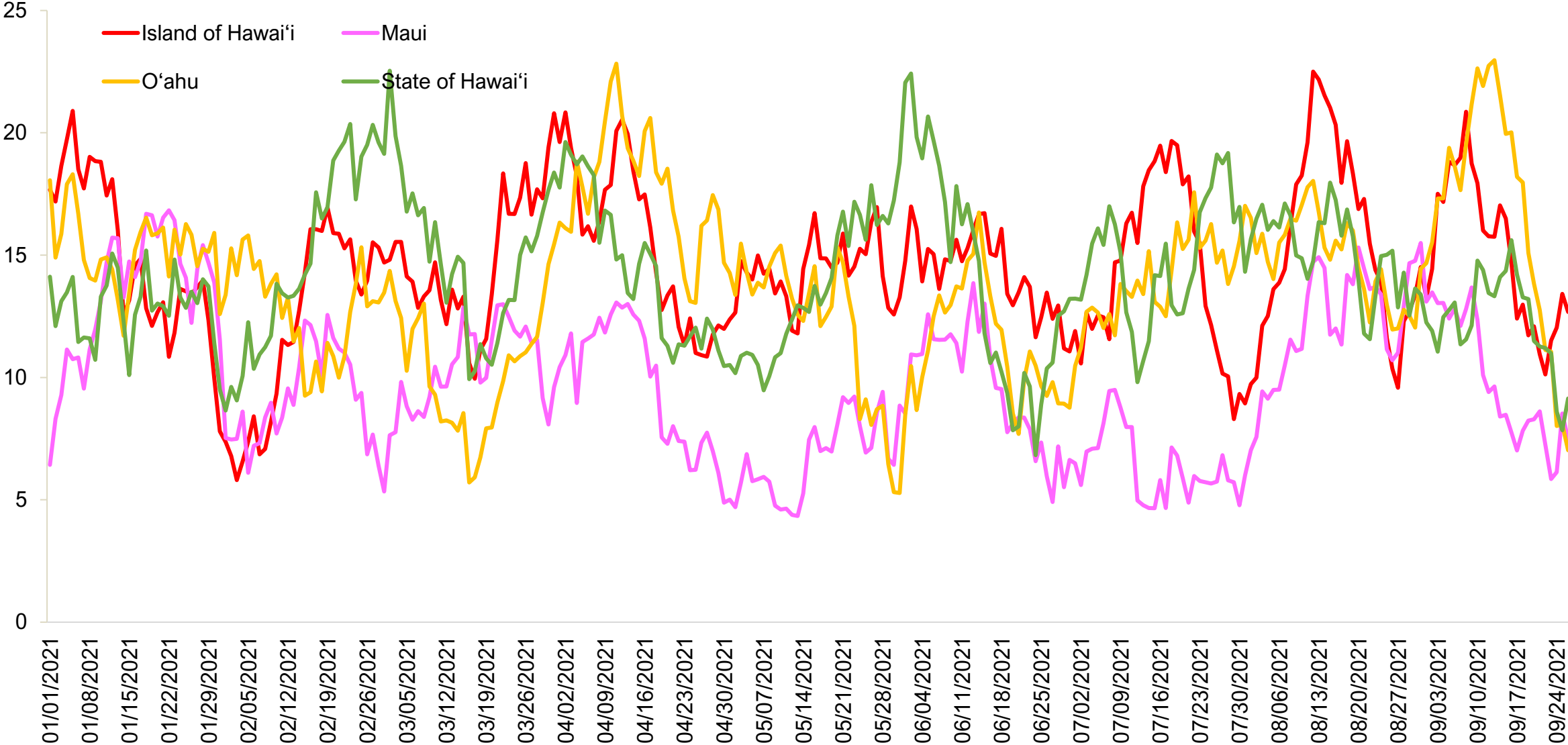
Source: YouGov data as of September 6, 2021

# 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?)

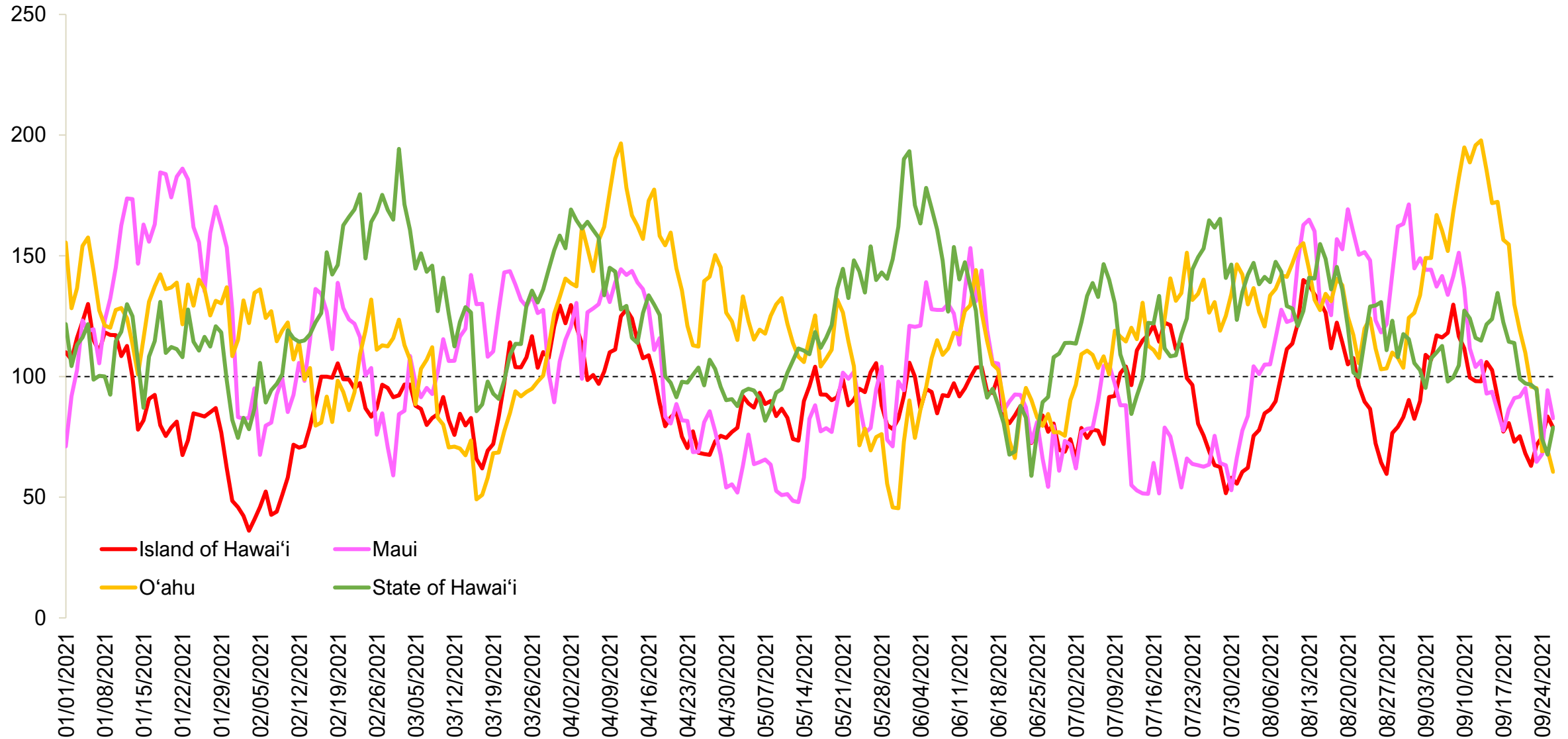
# Japan Consideration (% Yes) Two-Week Moving Average



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 Consideration (% Yes) Two-Week Moving Average

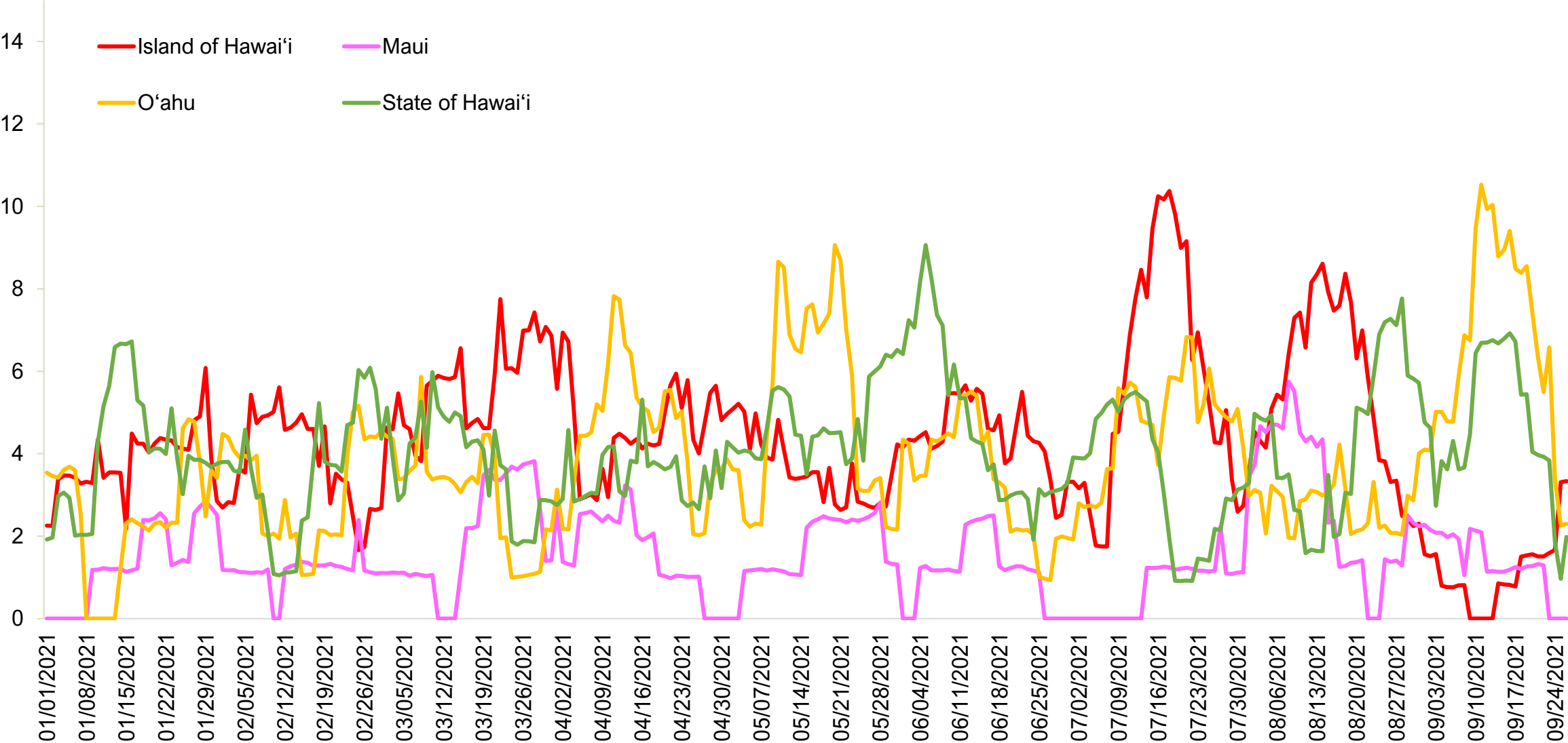


Question: (Net) Thinking about your next vacation by air alone or with friends, family, a partner or spouse, which of the following destinations would you consider?

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

Source: YouGov data as of September 6, 2021

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



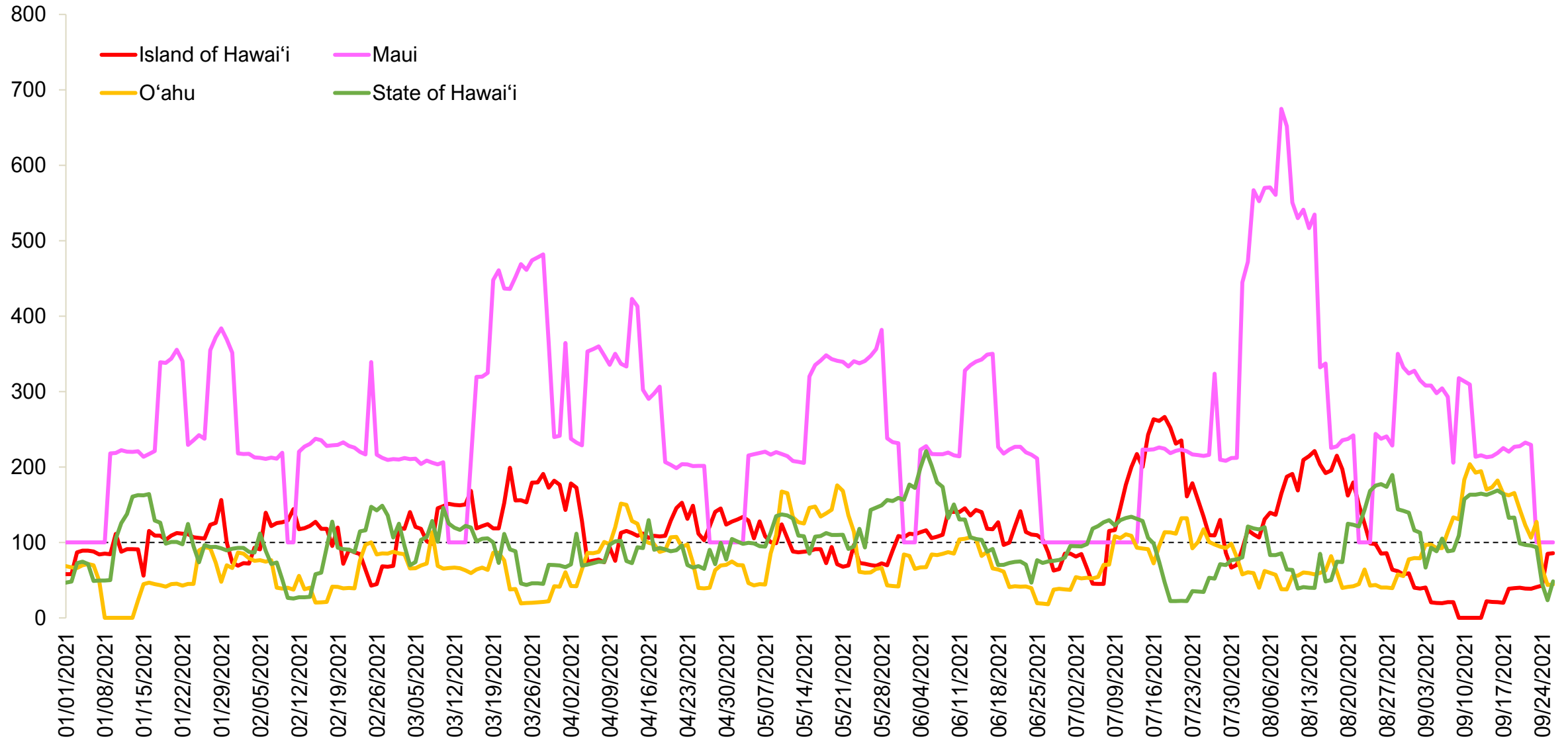
Question: (Net) Of the destinations considered, which are you most likely to visit?

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

Source: YouGov data as of September 6, 2021



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

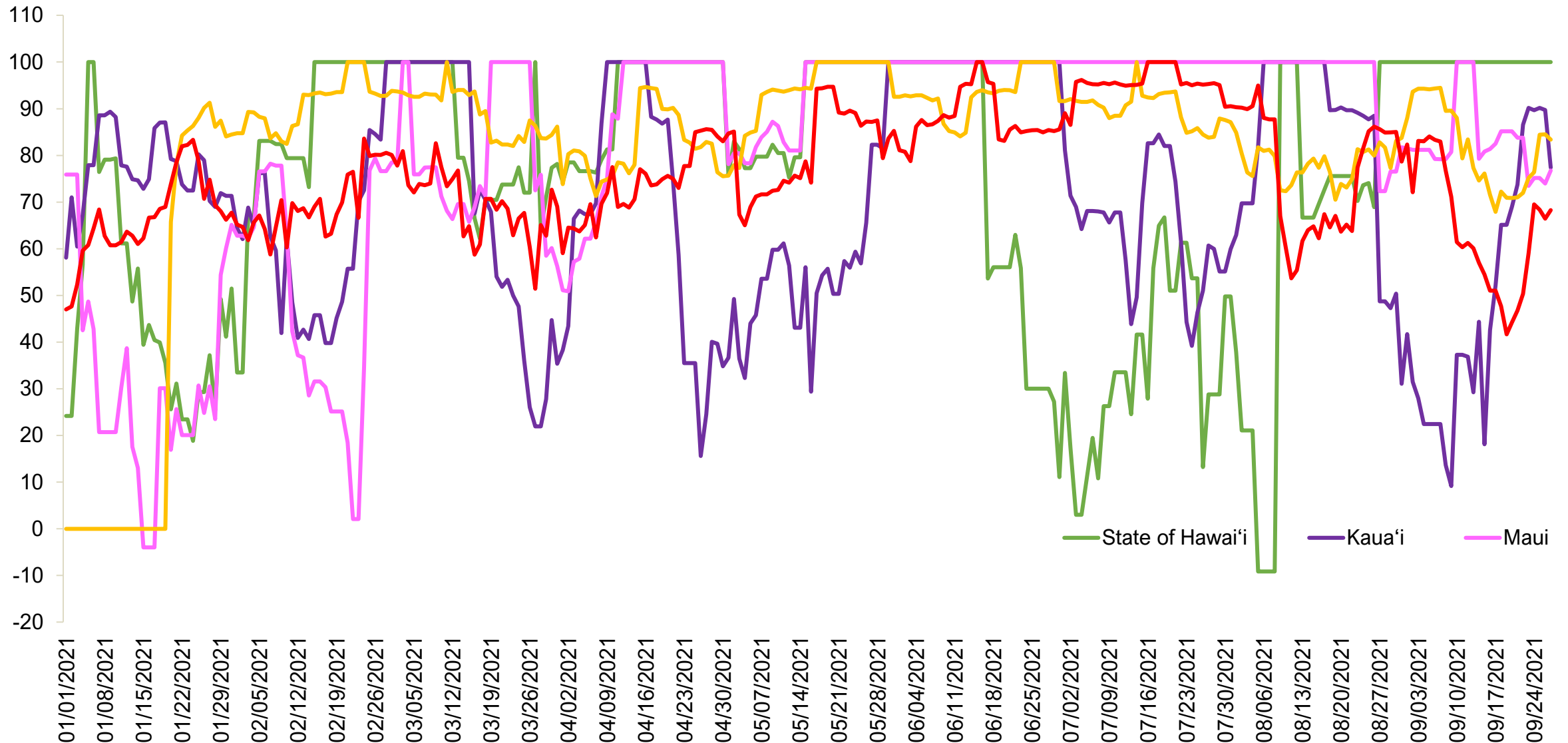


Question: (Net) Of the destinations considered, which are you most likely to visit?

# Canada Destination Index Trends



# Canada Buzz Net Score Two-Week Moving Average

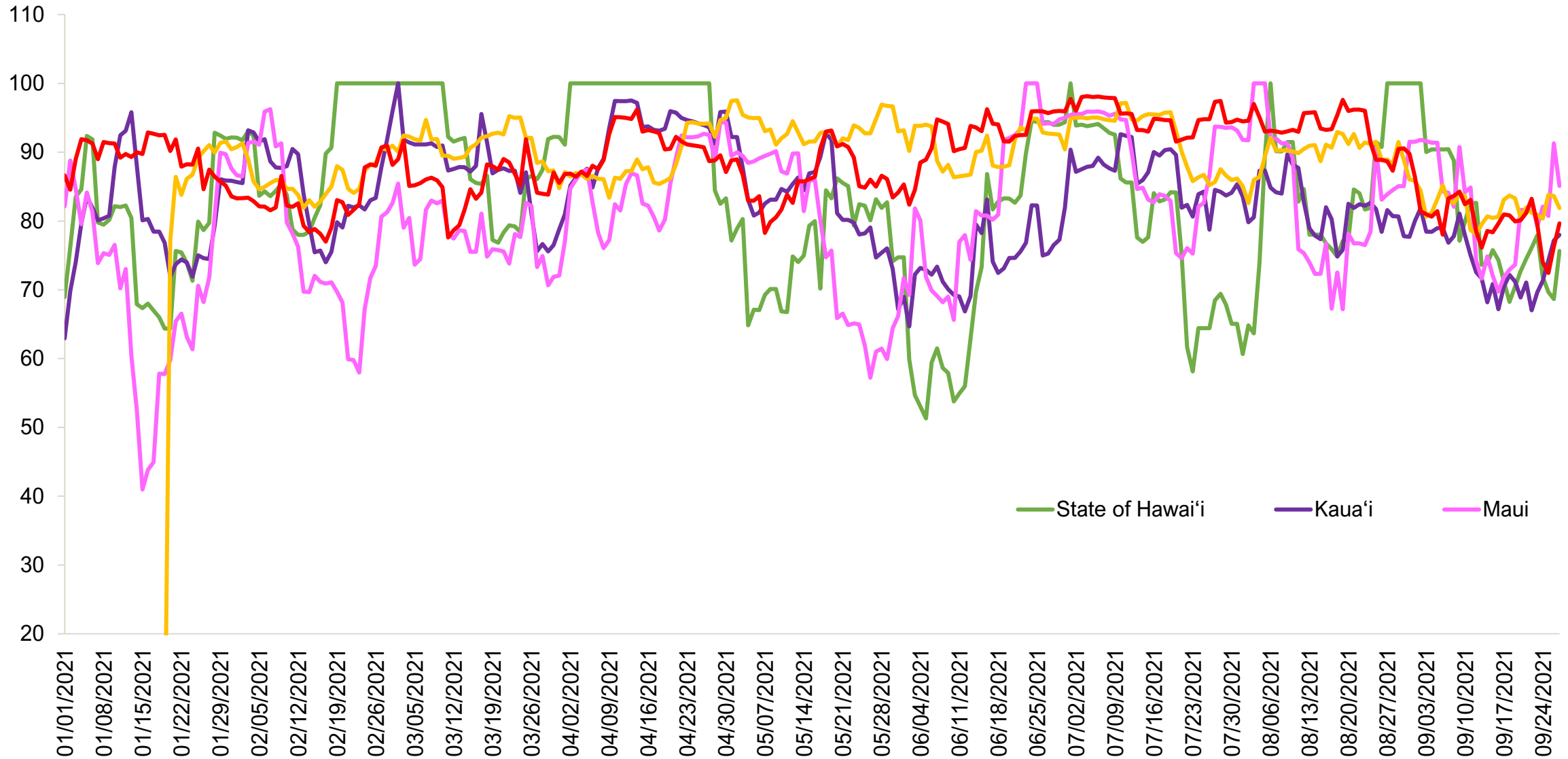


Question: (Net) Over the PAST TWO WEEKS, which of the following destinations have you heard something POSITIVE about (whether in the news, through advertising, or talking to friends and family)? / Now which of the following have you heard something NEGATIVE about over the PAST TWO WEEKS?

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

Source: YouGov data as of September 6, 2021

# Canada Recommend Net Score Two-Week Moving Average

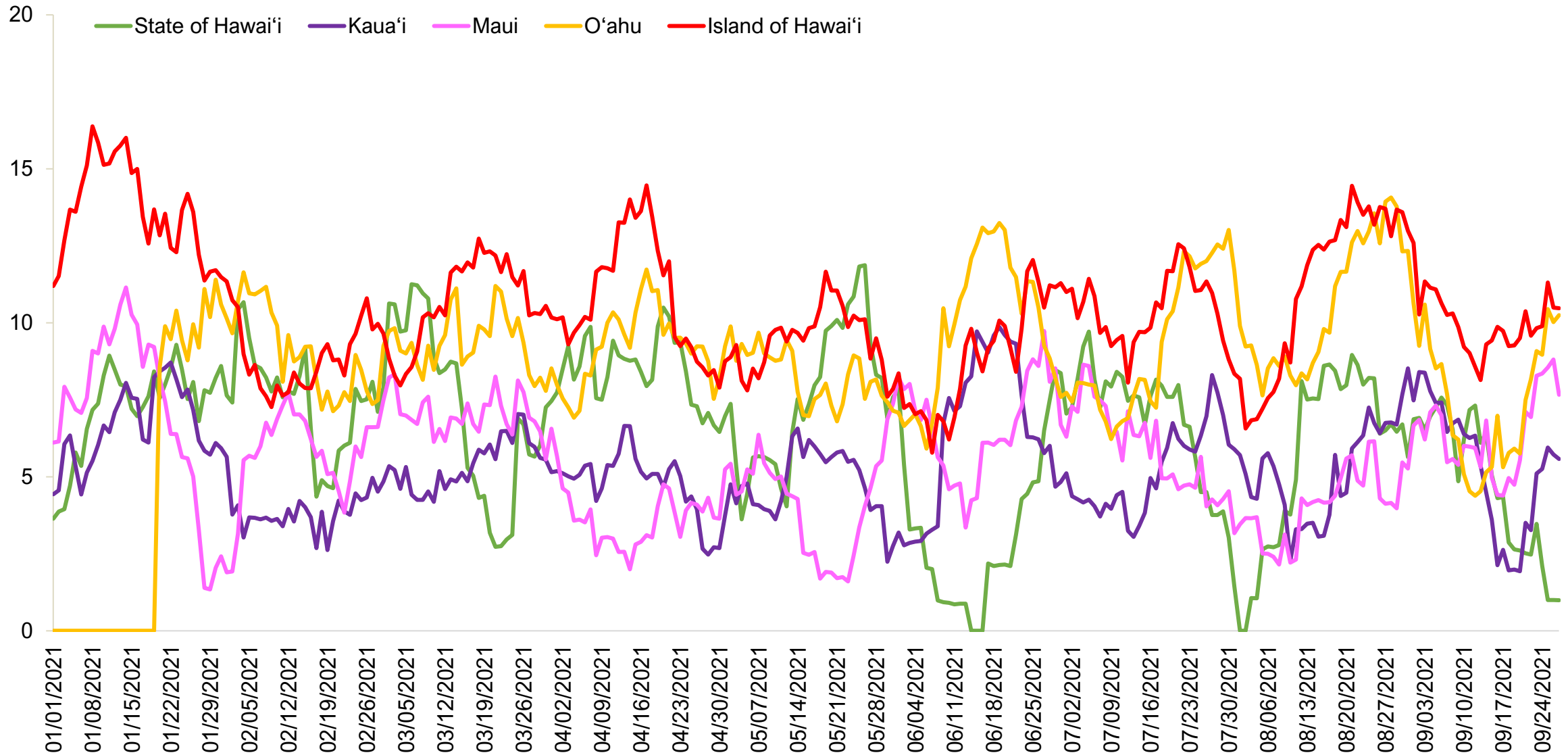


Question: (Net) Which of the following destinations would you RECOMMEND to a friend or colleague? / And which of the following destinations would you tell a friend or colleague to AVOID?

*\*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

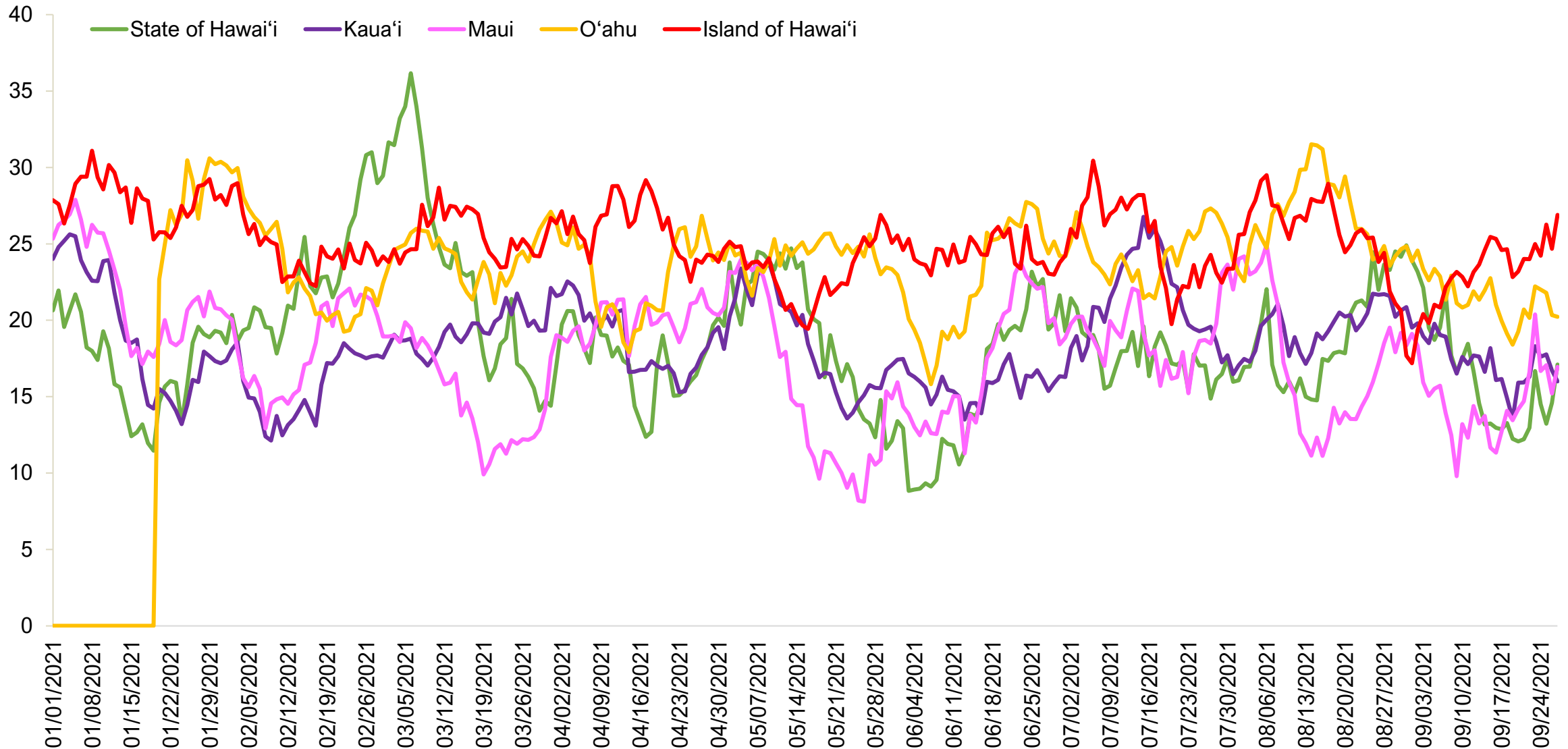


Question: (Net) Which of the following destinations have you talked about with friends and family in the PAST TWO WEEKS (whether in-person, online, or through social media?)

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

Source: YouGov data as of September 6, 2021

# Canada Consideration (% Yes) Two-Week Moving Average



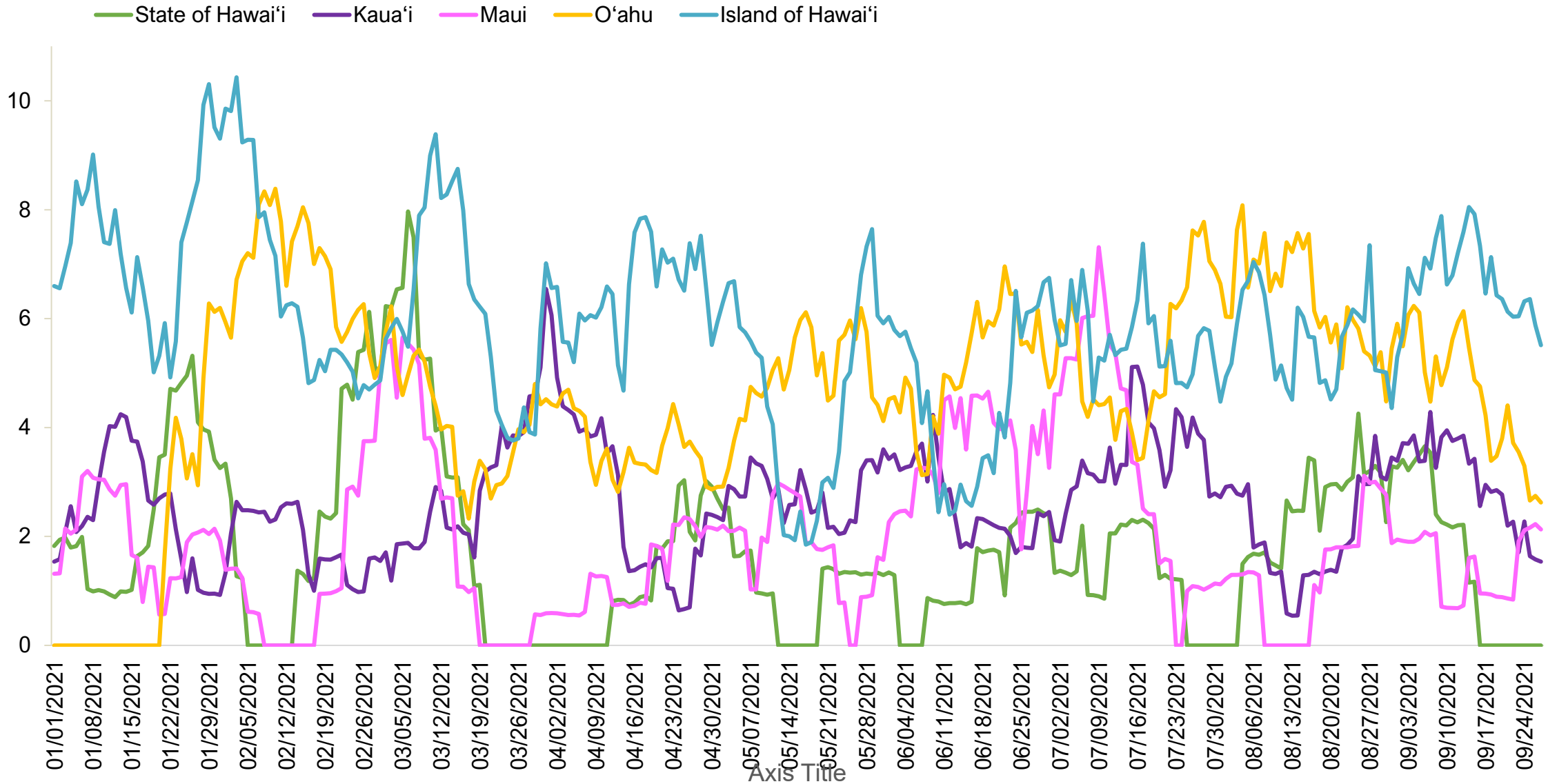
Question: (Net) Thinking about your next vacation by air alone or with friends, family, a partner or spouse, which of the following destinations would you consider?

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

Source: YouGov data as of September 6, 2021



# Canada Purchase Intent (% Yes) Two-Week Moving Average



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

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

Source: YouGov data as of September 6, 2021