

# YouGov Destination Index Trends Responsible Travelers Segment

July 26, 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 11 million participants in 55 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
- Responsible Traveler Segment
  - Respondents who self-identify as responsible travelers (i.e., wellness focused, environmental impact, culturally minded)

# 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

# 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>

**July 25-26, 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>

**July 26, 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

**August 18, 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.

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

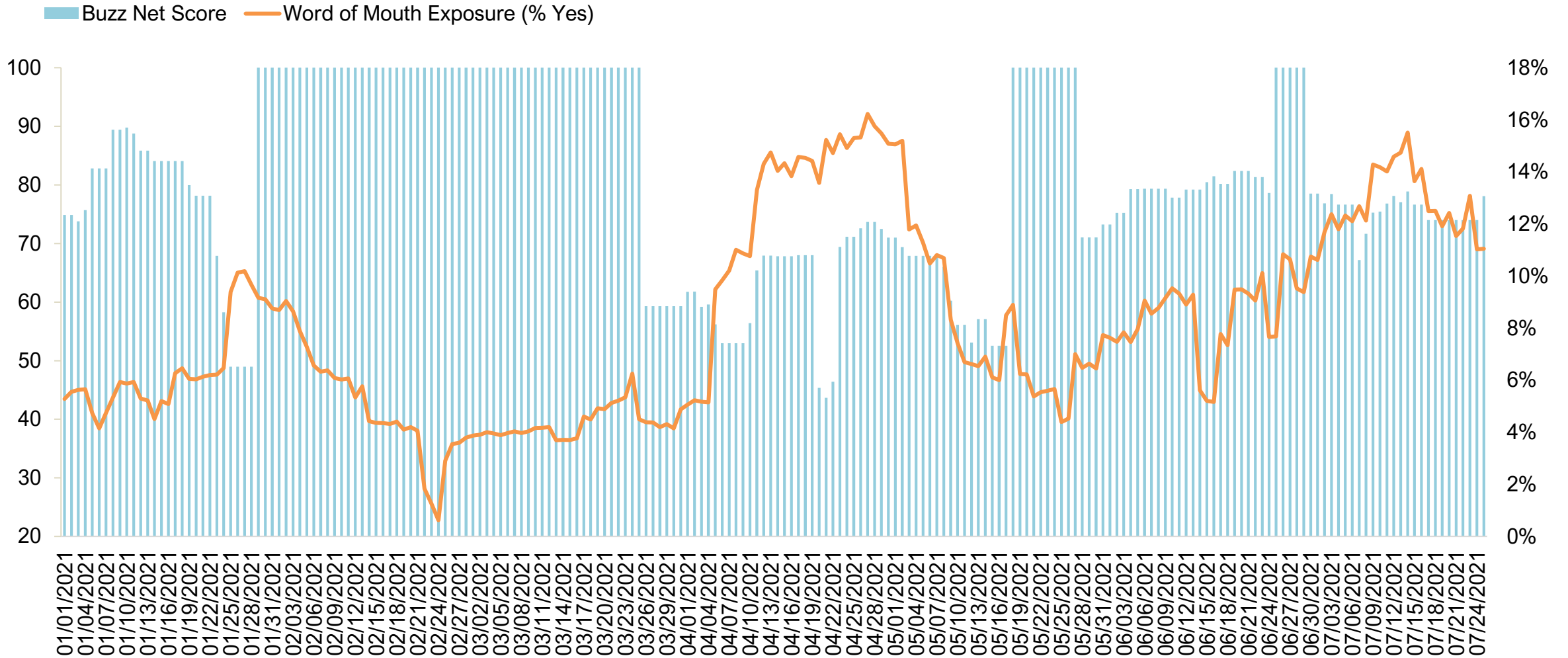
**March 3, 2021** – Gov. Ige approves Kaua'i's re-entry into Safe Travels for Trans-Pacific travelers beginning April 5

**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 Responsible Travelers Segment O'ahu



# O'ahu – Buzz Net Score and Word of Mouth Exposure (% Yes) U.S. Four-Week Moving Average

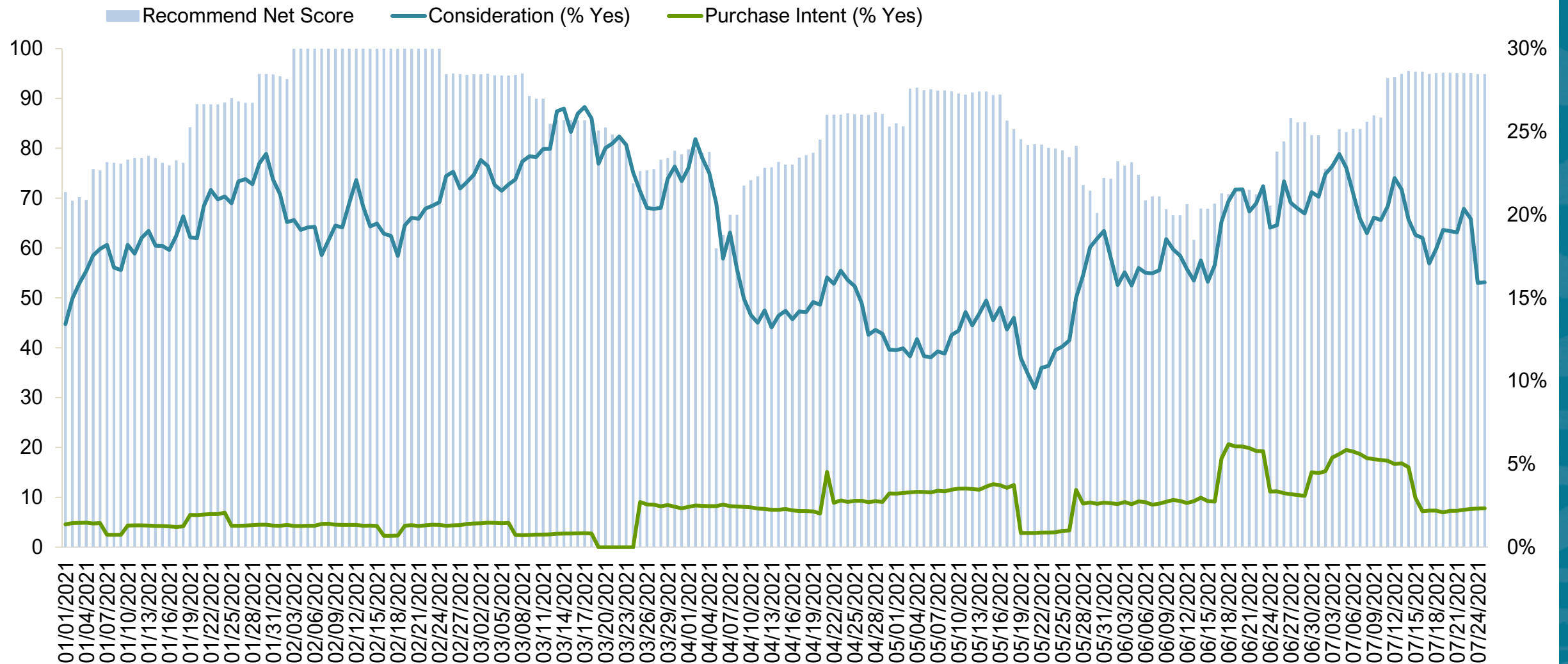


**Buzz Question:** (Net) Over the PAST TWO WEEKS, which of the following destinations have you heard something POSITIVE about (whether in the news, through advertising, or talking to friends and family)? / Now which of the following have you heard something NEGATIVE about over the PAST TWO WEEKS?

**Word of Mouth Exposure 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?)



# O'ahu – Recommend Net Score, Consideration (% Yes), Purchase Intent (% Yes) U.S. Four-Week Moving Average



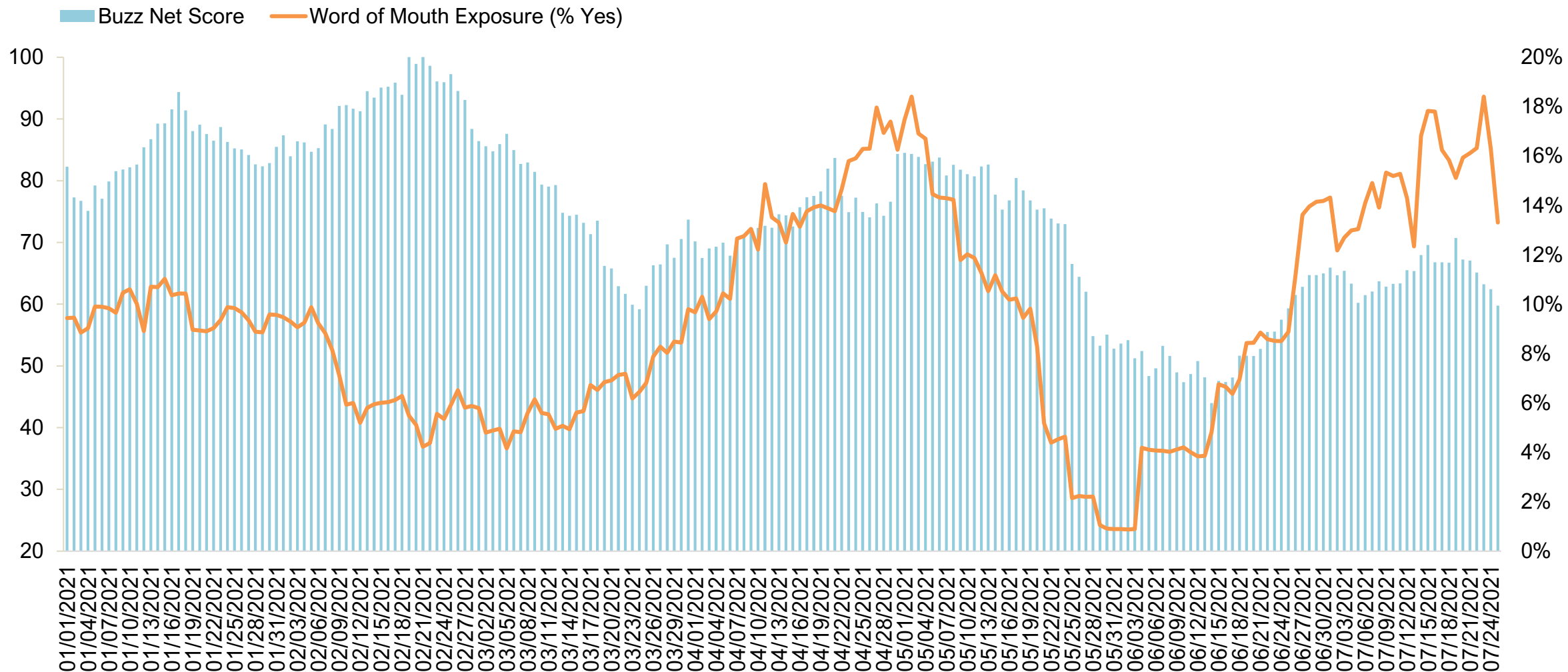
**Recommend Question:** (Net) Which of the following destinations would you RECOMMEND to a friend or colleague? / And which of the following destinations would you tell a friend or colleague to AVOID?  
**Consideration Question:** (Net) Thinking about your next vacation by air alone or with friends, family, a partner or spouse, which of the following destinations would you consider?  
**Purchase Intent Question:** (Net) Of the destinations considered, which are you most likely to visit?



# U.S. Destination Index Trends Responsible Travelers Segment Maui



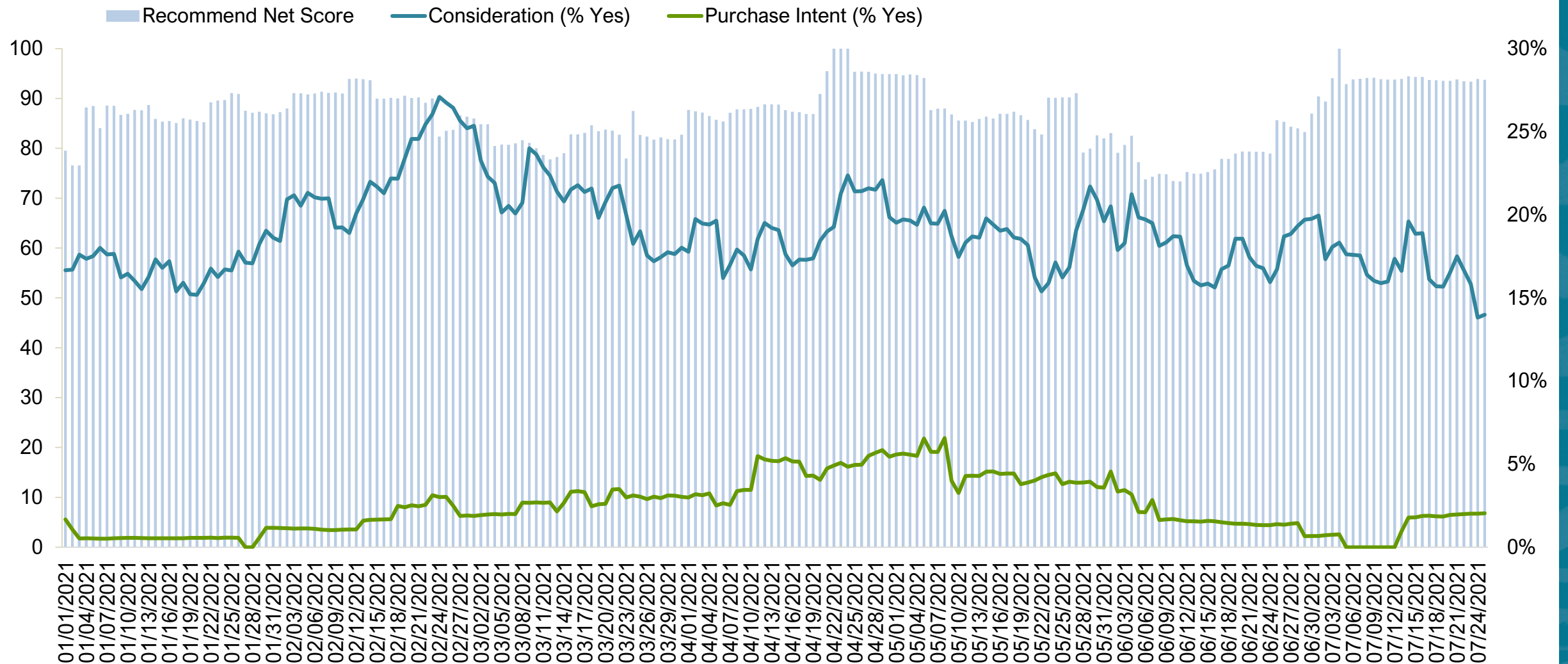
# Maui – Buzz Net Score and Word of Mouth Exposure (% Yes) U.S. Four-Week Moving Average



**Buzz 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?

**Word of Mouth Exposure 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?)

# Maui – Recommend Net Score, Consideration (% Yes), Purchase Intent (% Yes) U.S. Four-Week Moving Average

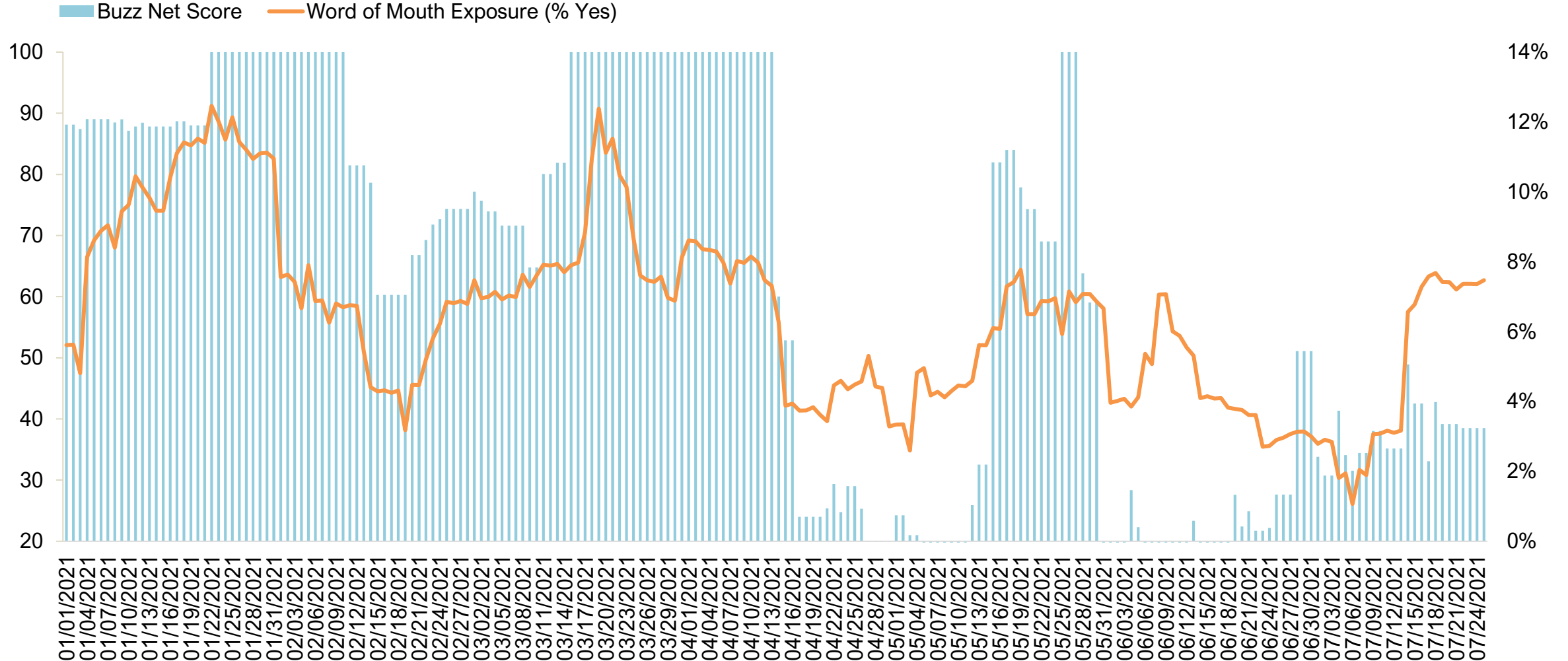


**Recommend Question:** (Net) Which of the following destinations would you RECOMMEND to a friend or colleague? / And which of the following destinations would you tell a friend or colleague to AVOID?  
**Consideration Question:** (Net) Thinking about your next vacation by air alone or with friends, family, a partner or spouse, which of the following destinations would you consider?  
**Purchase Intent Question:** (Net) Of the destinations considered, which are you most likely to visit?

# U.S. Destination Index Trends Responsible Travelers Segment Kaua'i



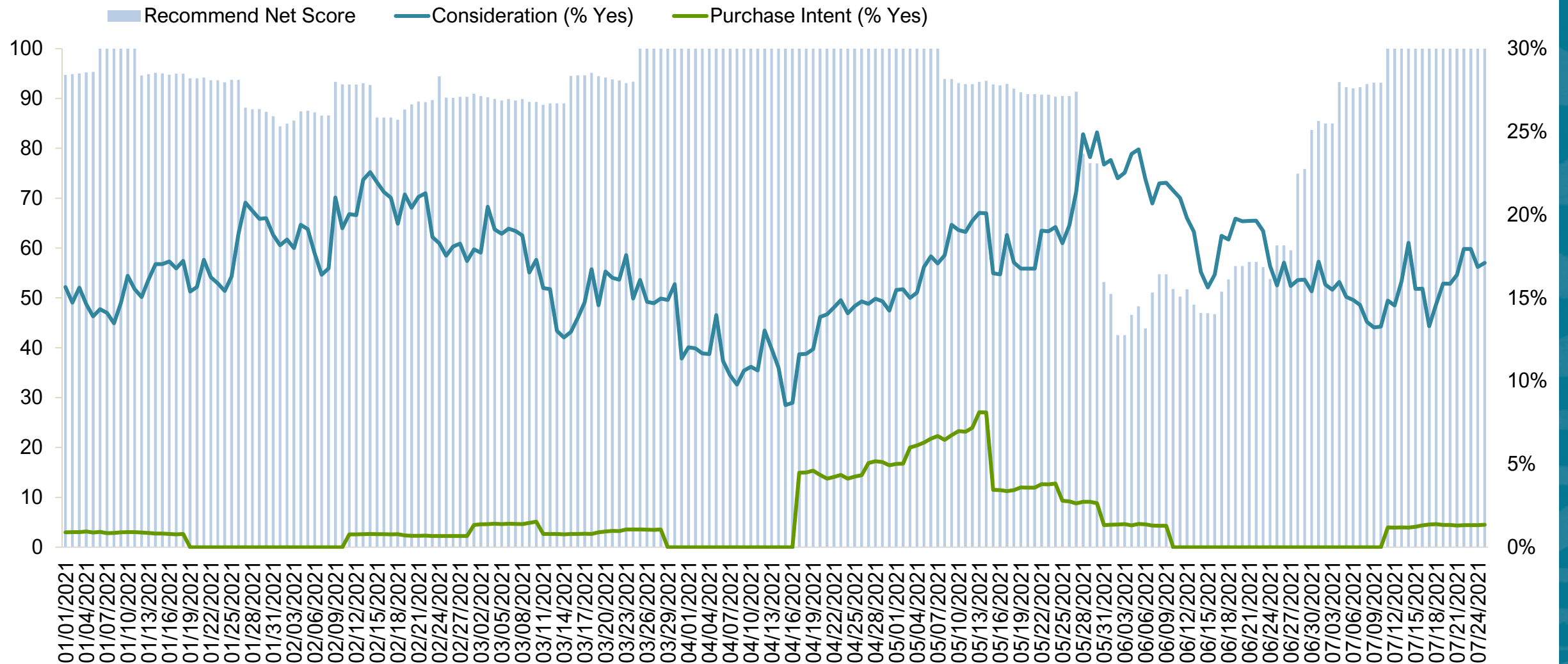
# Kaua'i – Buzz Net Score and Word of Mouth Exposure (% Yes) U.S. Four-Week Moving Average



**Buzz 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?

**Word of Mouth Exposure 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 – Recommend Net Score, Consideration (% Yes), Purchase Intent (% Yes) U.S. Four-Week Moving Average



**Recommend 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 July 25, 2021

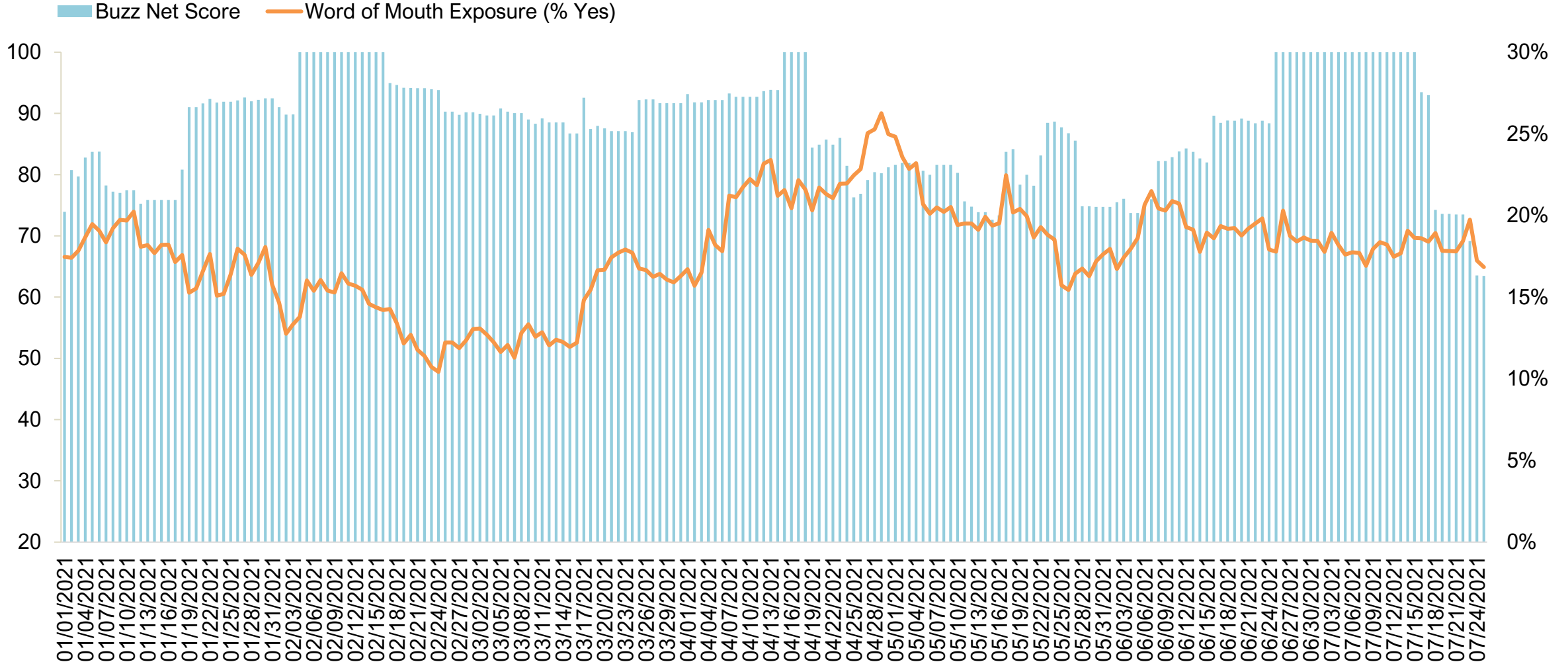


# U.S. Destination Index Trends Responsible Travelers Segment Island of Hawai'i





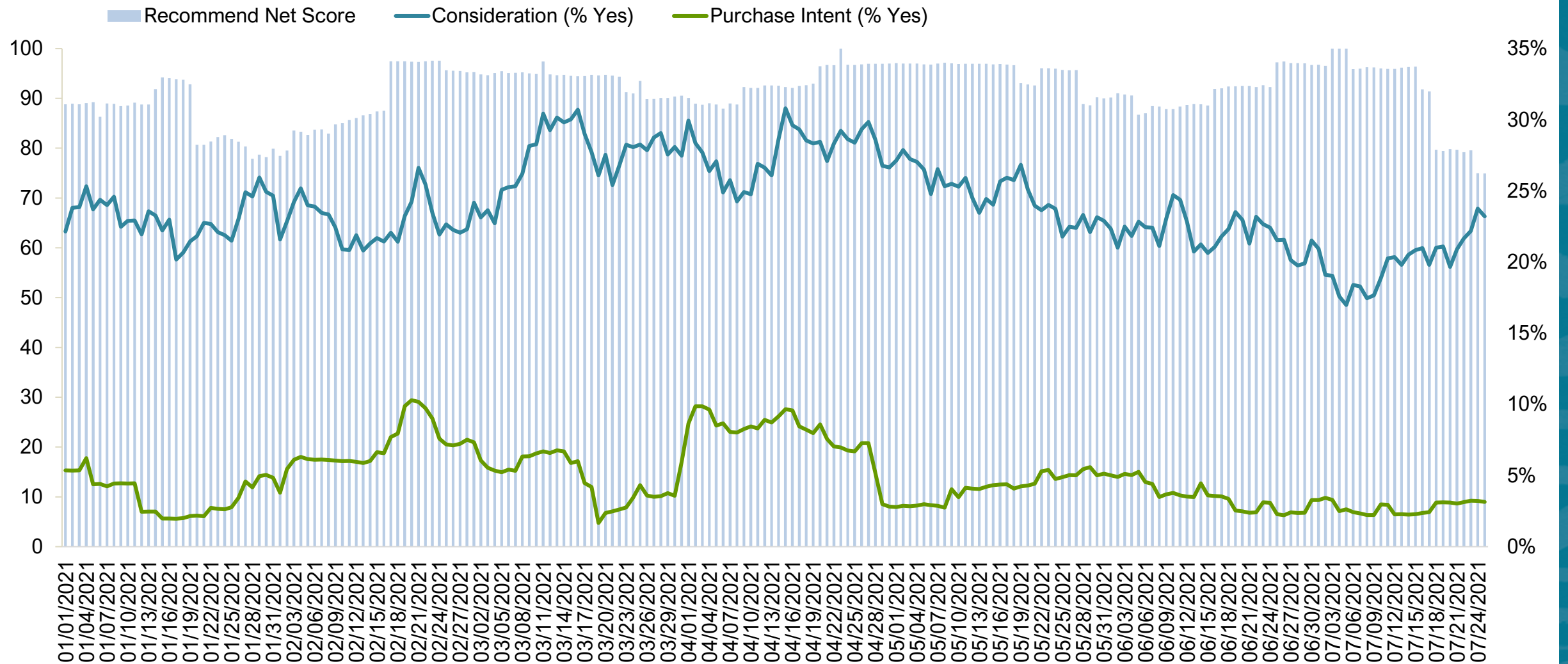
# Island of Hawai'i – Buzz Net Score and Word of Mouth Exposure (% Yes) U.S. Four-Week Moving Average



**Buzz 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?

**Word of Mouth Exposure 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 – Recommend Net Score, Consideration (% Yes), Purchase Intent (% Yes) U.S. Four-Week Moving Average



**Recommend 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?  
**Consideration 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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