

COVID-19 Impact on U.S. Avid Travelers

An HVCB analysis of YouGov data provided by HTA as of July 11, 2021

Reported on July 22, 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

Segment Definitions

Avid Traveler \$100K+

- Gross household income is \$100K+
- Age is 25-54
- Either
 - Took an international vacation by air in the last 12 months
 - Likely/very likely to book an air trip in the next 12 months
 - Most recent leisure destination was Hawai'i or Alaska
 - Next leisure destination is Hawai'i or Alaska

Avid Traveler \$150K+

- Gross household income is \$150K+
- 2+ persons per household
- Age is 25-54
- Either
 - Took an international vacation by air in the last 12 months
 - Likely/very likely to book an air trip in the next 12 months
 - Most recent leisure destination was Hawai'i or Alaska
 - Next leisure destination is Hawai'i or Alaska

Long-Distance Air Traveler under 55

- Took an international vacation by air in the last 12 months
- State of residence is not Hawai'i
- Under the age of 55

Nationally Representative Sample (Nat Rep)

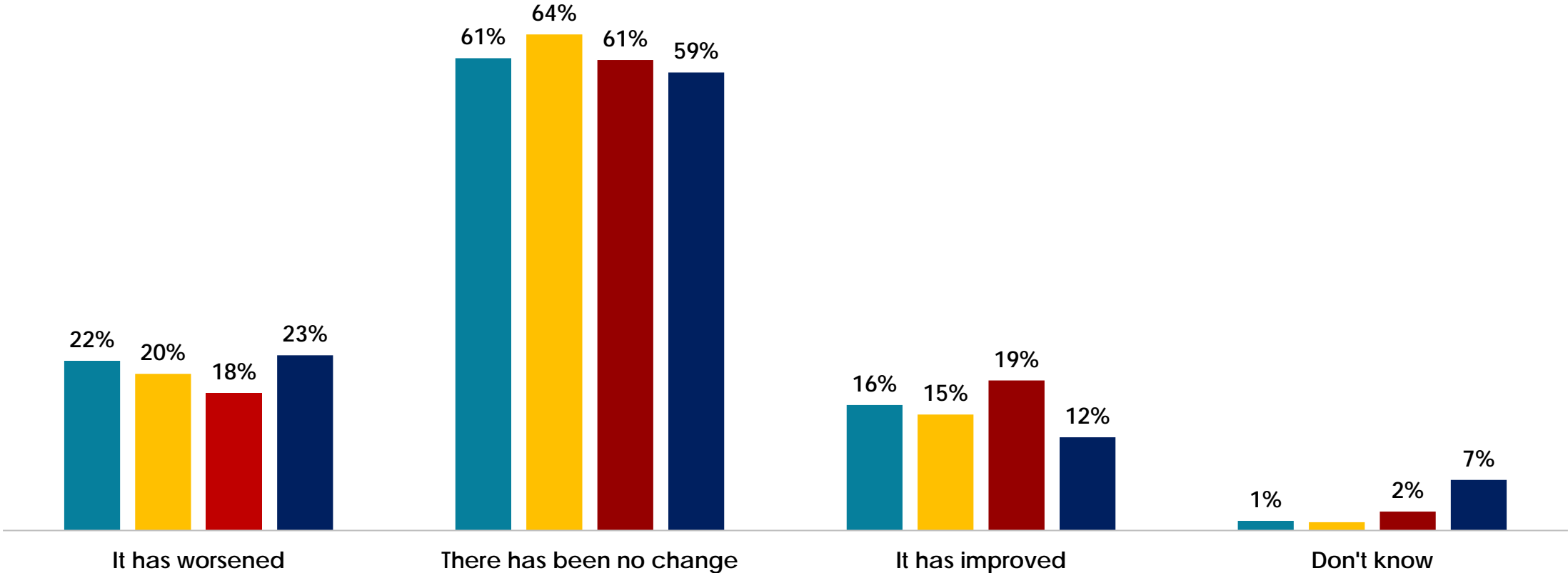
- Representative of U.S. adults in terms of age, gender, social class and education



Travelers' Pandemic Outlook

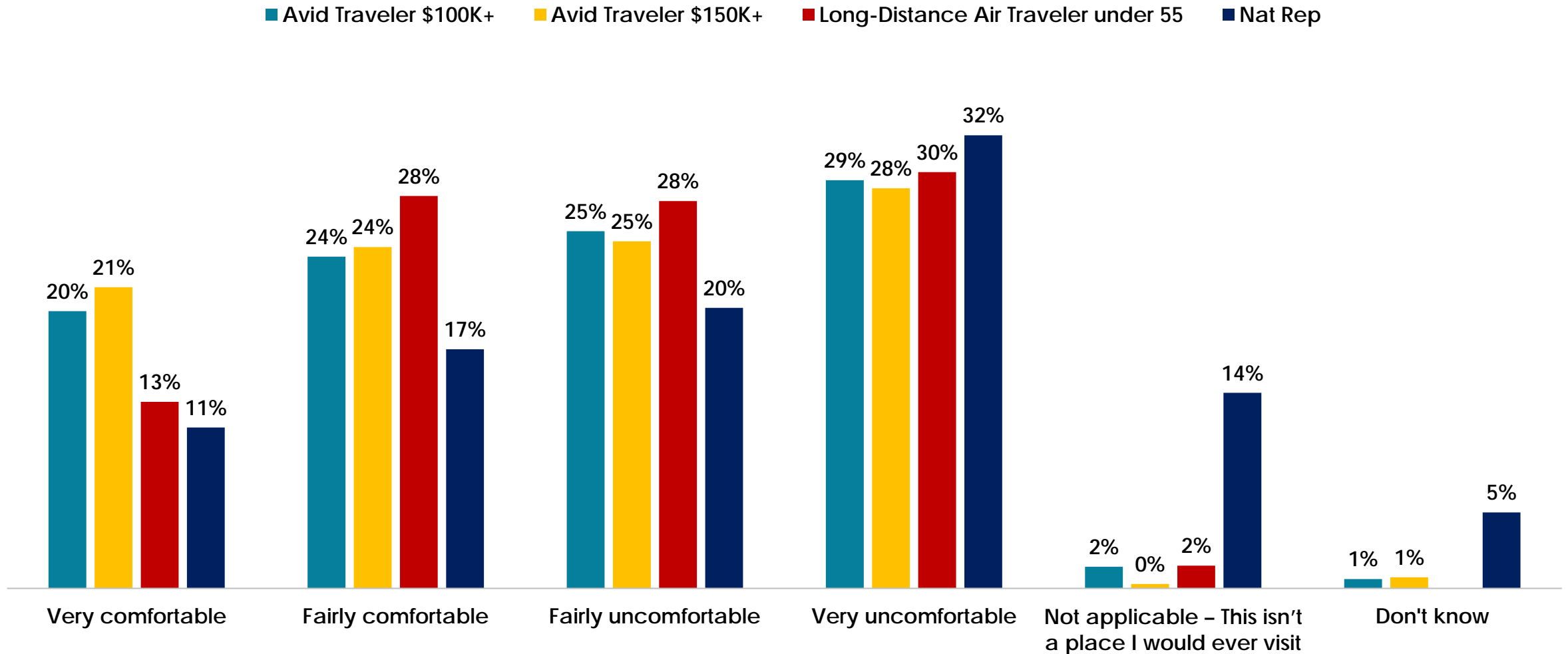
How has your household economic situation changed in the past month?

■ Avid Traveler \$100K+ ■ Avid Traveler \$150K+ ■ Long-Distance Air Traveler under 55 ■ Nat Rep



Source: HVCB analysis of YouGov data provided by HTA as of July 11, 2021

Level of comfort visiting an airport right now

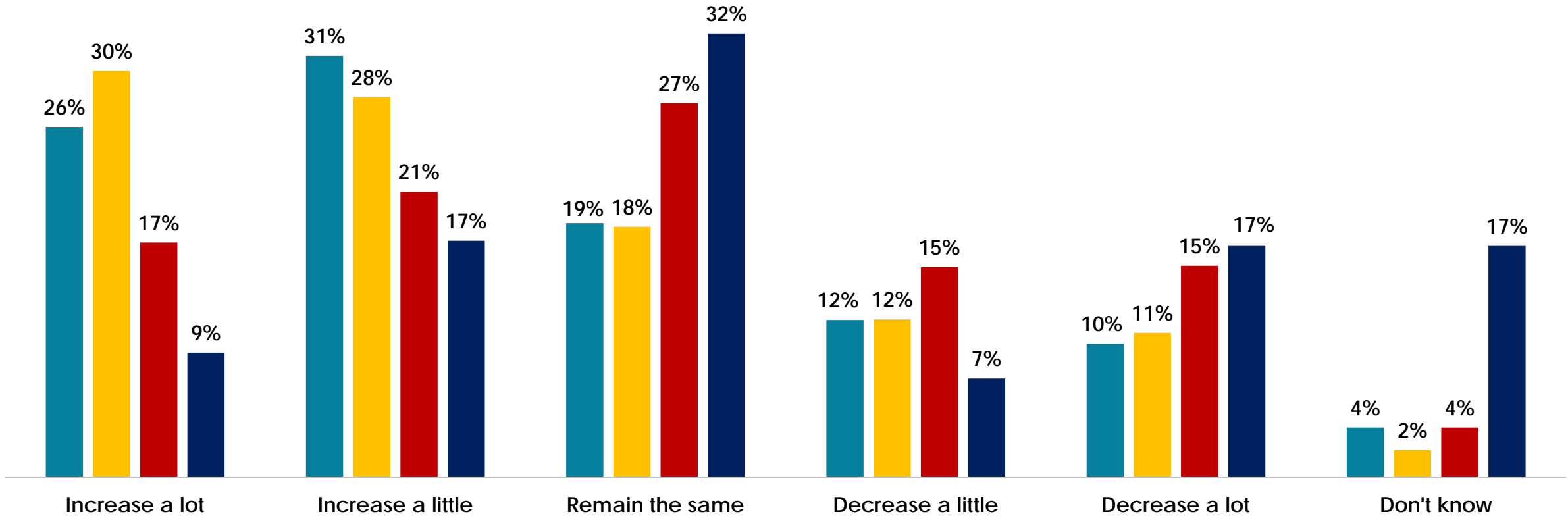




Future Travel Plans

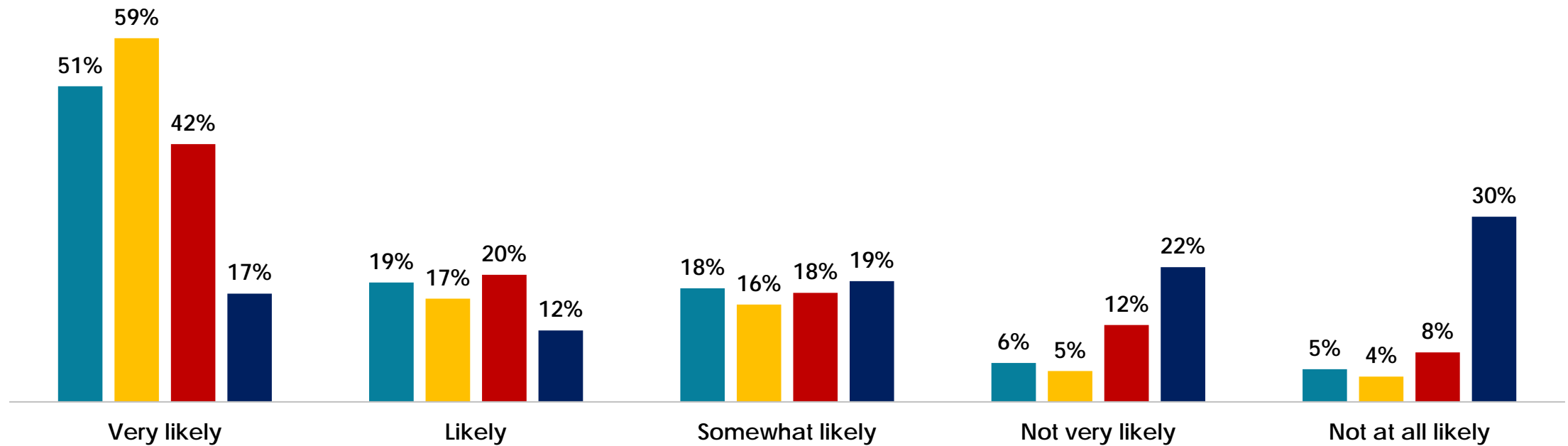
Future Travel – Expected change to air travel in the next 12 months

■ Avid Traveler \$100K+
 ■ Avid Traveler \$150K+
 ■ Long-Distance Air Traveler under 55
 ■ Nat Rep

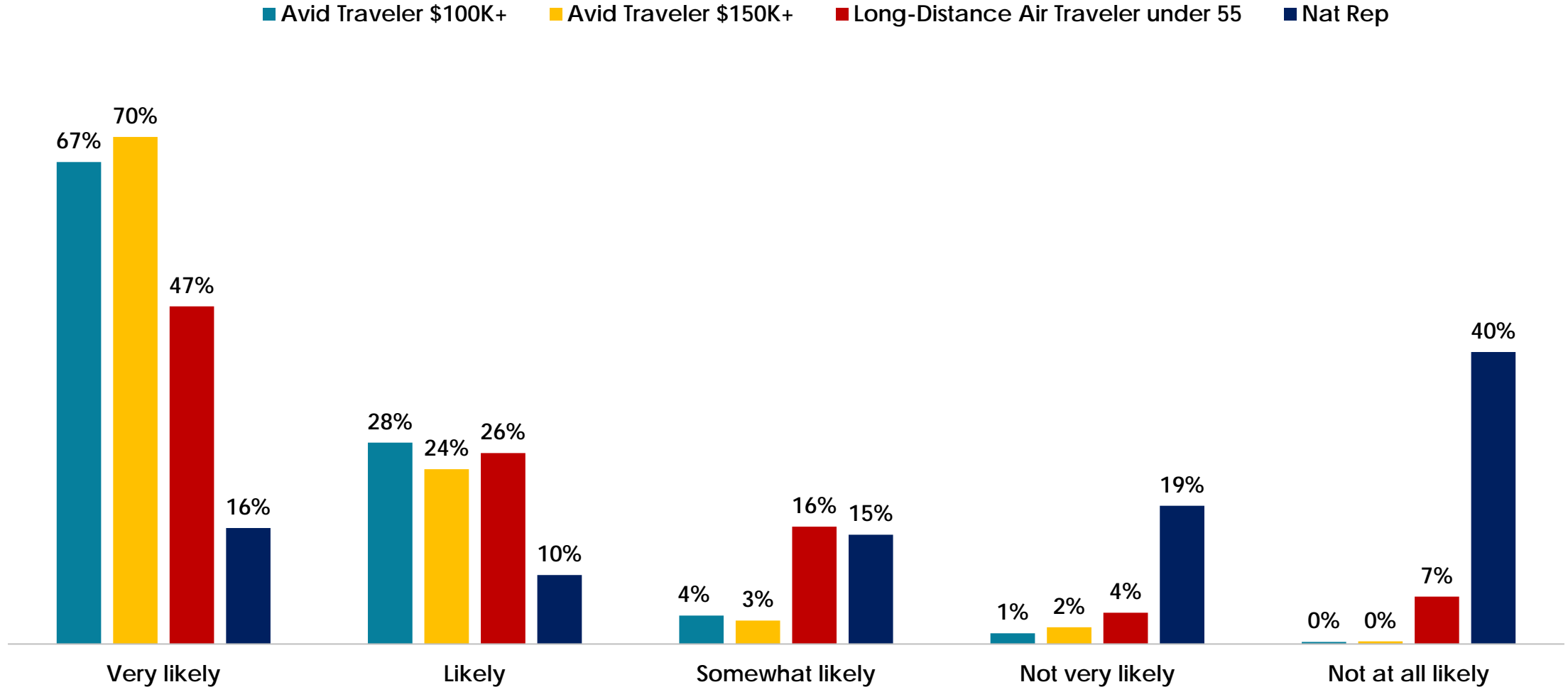


Future Travel – Likelihood of purchasing travel or leisure services in the next 12 months

■ Avid Traveler \$100K+ ■ Avid Traveler \$150K+ ■ Long-Distance Air Traveler under 55 ■ Nat Rep



Future Travel – Likelihood of booking a flight in the next 12 months



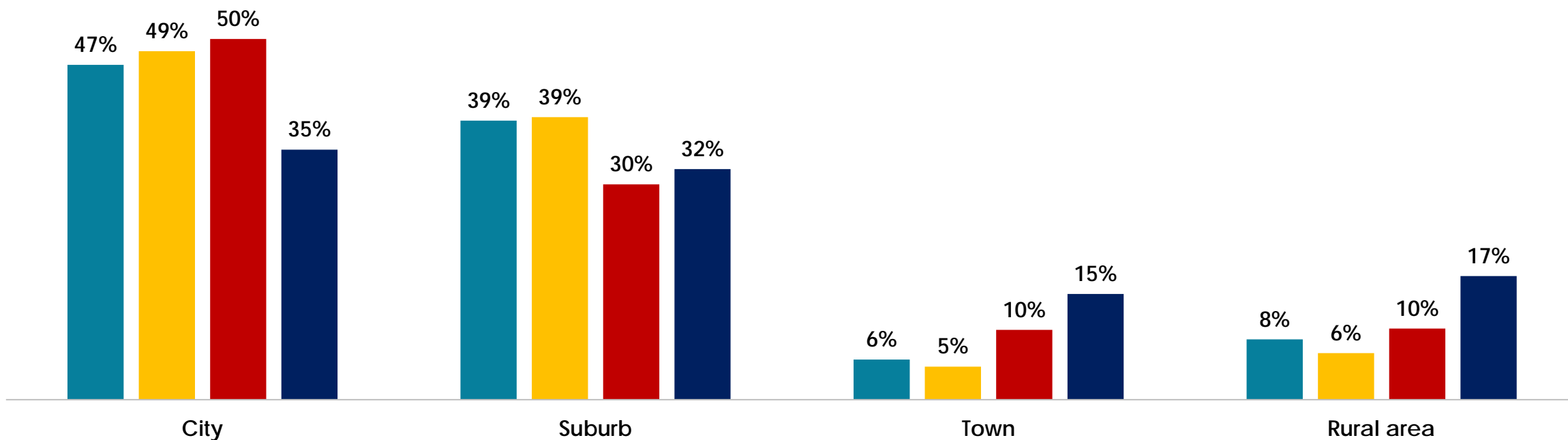


Traveler Profiles

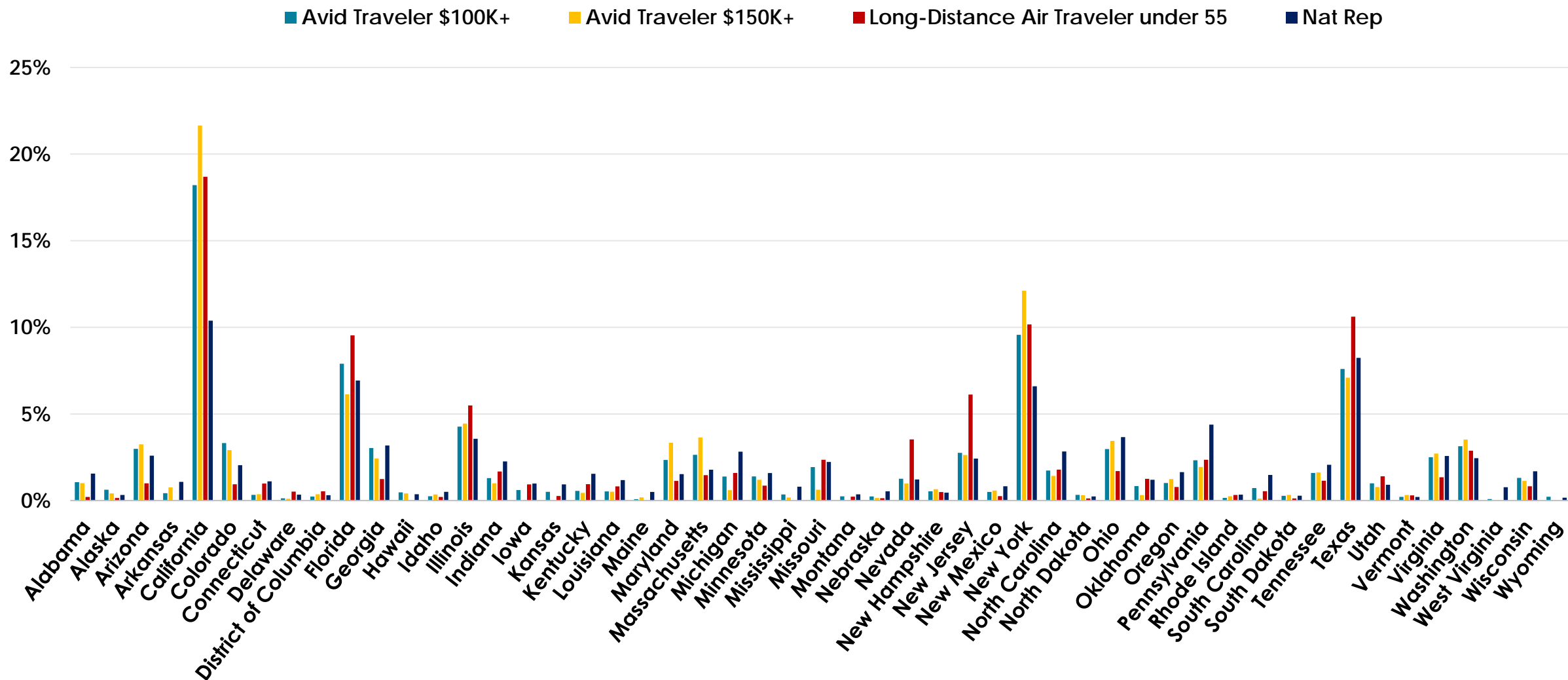
Avid Travelers vs. Long-Distance Air Travelers vs. Nat. Rep.

Type of Area Living In

■ Avid Traveler \$100K+
 ■ Avid Traveler \$150K+
 ■ Long-Distance Air Traveler under 55
 ■ Nat Rep



State of Residence



Top 10 States of Residence by Segment

Avid Traveler \$100K, 25-54, individual

California	18.2%
New York	9.6%
Florida	7.9%
Texas	7.6%
Illinois	4.3%
Colorado	3.3%
Washington	3.1%
Georgia	3.0%
Arizona	3.0%
Ohio	3.0%

Avid Traveler \$150K, 25-54, 2+ household

California	21.7%
New York	12.1%
Texas	7.1%
Florida	6.1%
Illinois	4.4%
Massachusetts	3.6%
Washington	3.5%
Ohio	3.4%
Maryland	3.3%
Arizona	3.2%

Long-Distance Air Traveler under 55

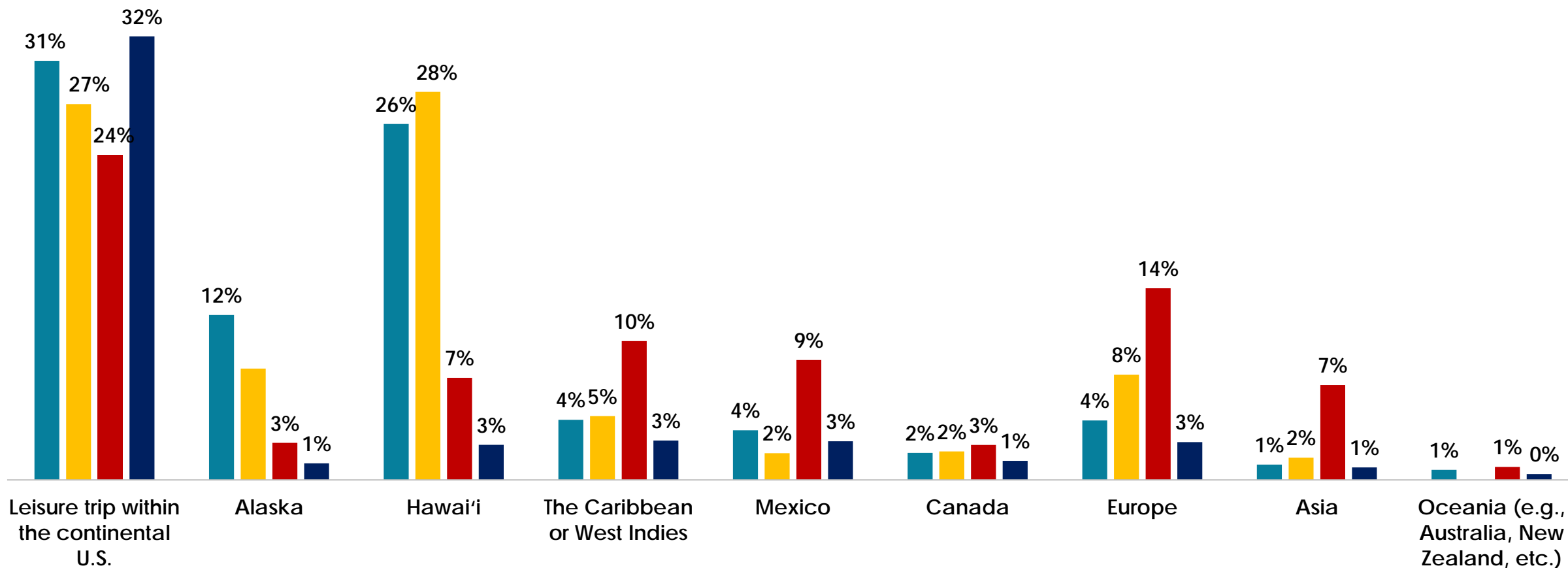
California	18.7%
Texas	10.6%
New York	10.2%
Florida	9.5%
New Jersey	6.1%
Illinois	5.5%
Nevada	3.5%
Washington	2.9%
Pennsylvania	2.4%
Missouri	2.4%

Nat Rep

California	10.4%
Texas	8.2%
Florida	6.9%
New York	6.6%
Pennsylvania	4.4%
Ohio	3.7%
Illinois	3.6%
Georgia	3.2%
North Carolina	2.8%
Michigan	2.8%

Leisure trip – most recent destination

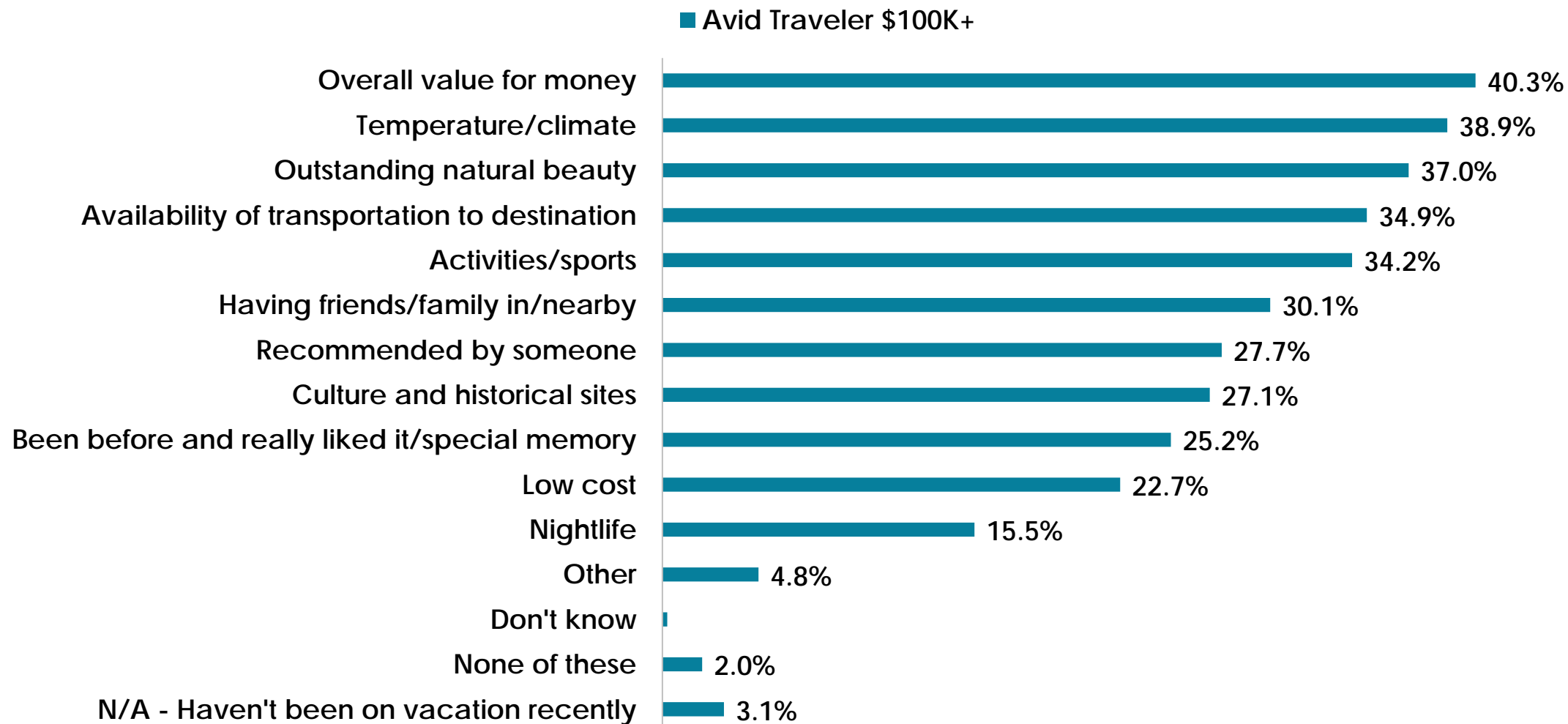
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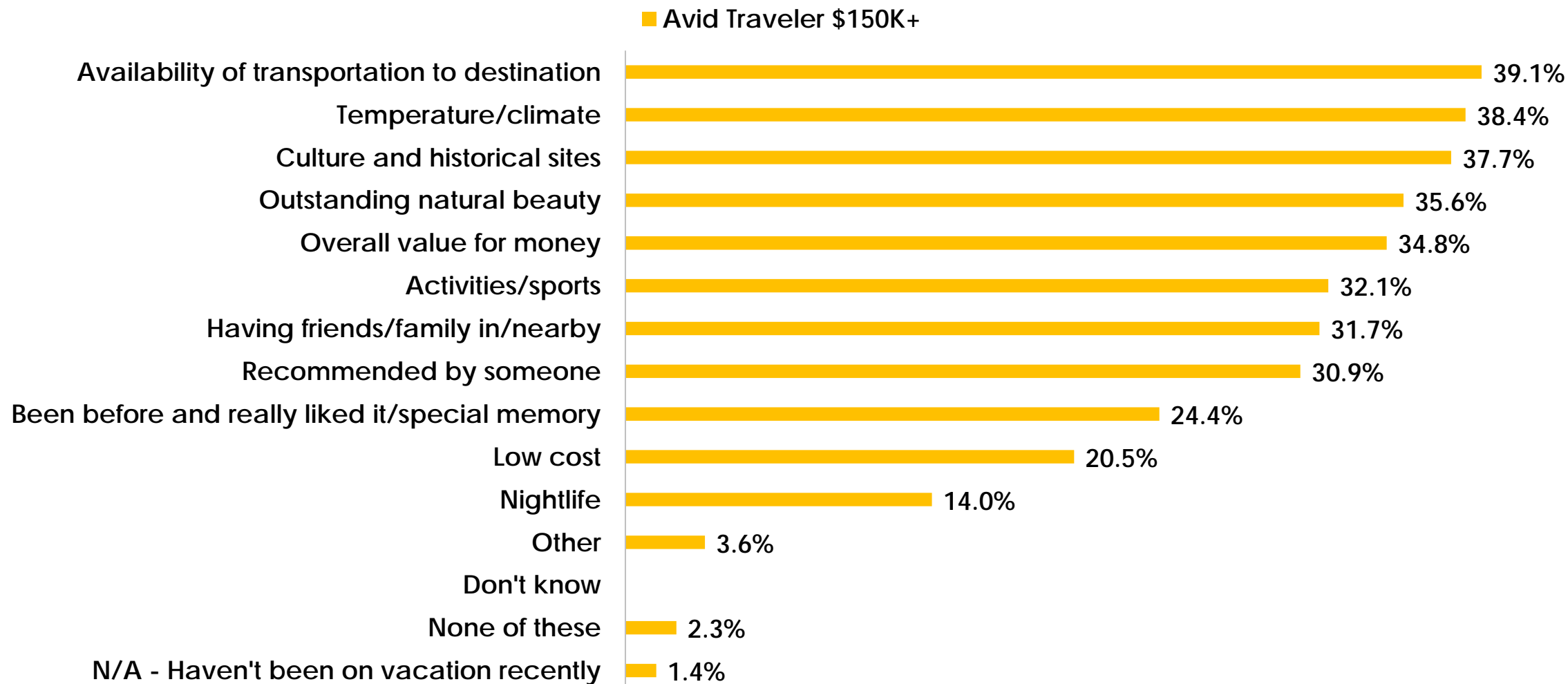
Reason for choosing most recent leisure destination

Reasons	Avid Traveler \$100K, 25-54, individual	Avid Traveler \$150K, 25-54, 2+ household	Long-Distance Air Traveler under 55	Nat Rep
Overall value for money	40.3%	34.8%	29.8%	30.3%
Temperature/climate	38.9%	38.4%	43.6%	24.1%
Outstanding natural beauty	37.0%	35.6%	23.7%	24.2%
Availability of transportation to destination	34.9%	39.1%	28.4%	14.8%
Activities/sports	34.2%	32.1%	29.0%	16.5%
Having friends/family in/nearby	30.1%	31.7%	29.9%	23.4%
Recommended by someone	27.7%	30.9%	18.2%	13.2%
Culture and historical sites	27.1%	37.7%	28.5%	18.6%
Been before and really liked it/special memory	25.2%	24.4%	20.8%	18.6%
Low cost	22.7%	20.5%	24.1%	23.0%
Nightlife	15.5%	14.0%	26.3%	8.6%
Other	4.8%	3.6%	1.3%	5.8%
Don't know	0.2%	0.0%	0.4%	2.4%
None of these	2.0%	2.3%	0.7%	2.3%
N/A - Haven't been on vacation recently	3.1%	1.4%	5.1%	23.7%

Reason for choosing most recent leisure destination

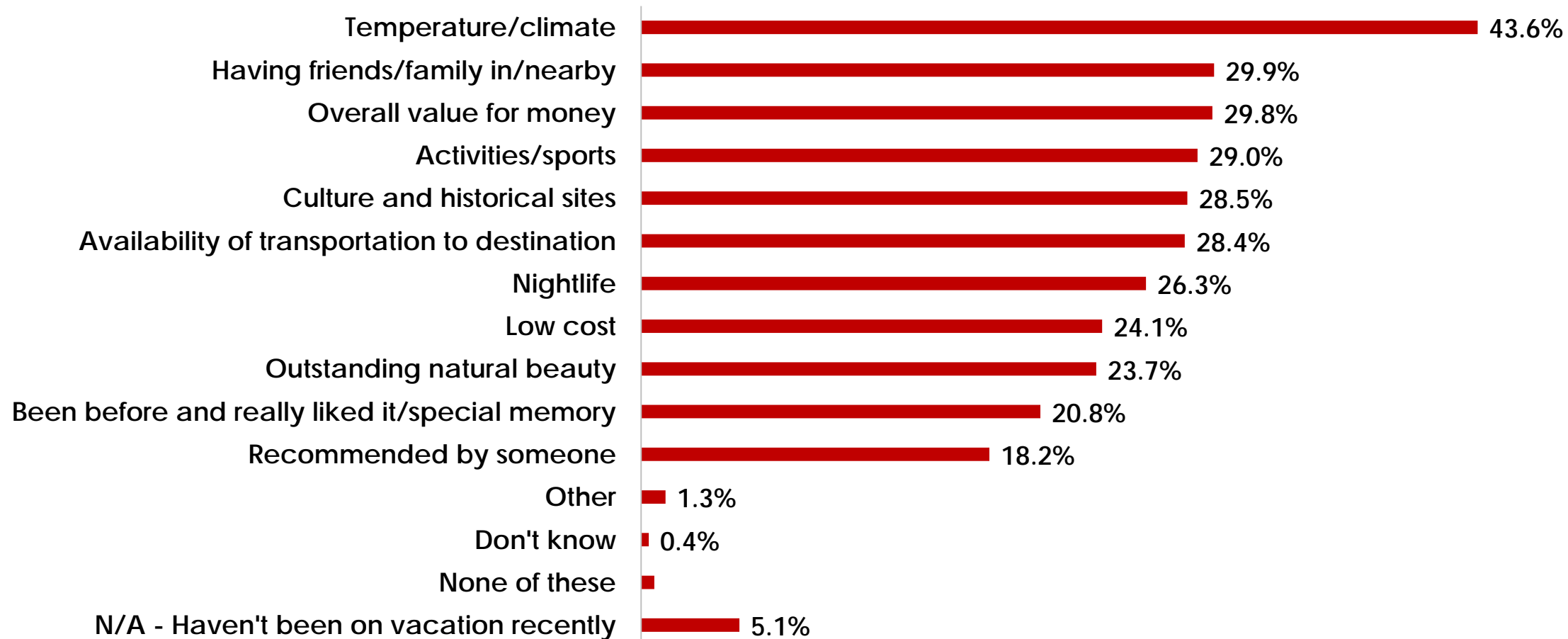


Reason for choosing most recent leisure destination

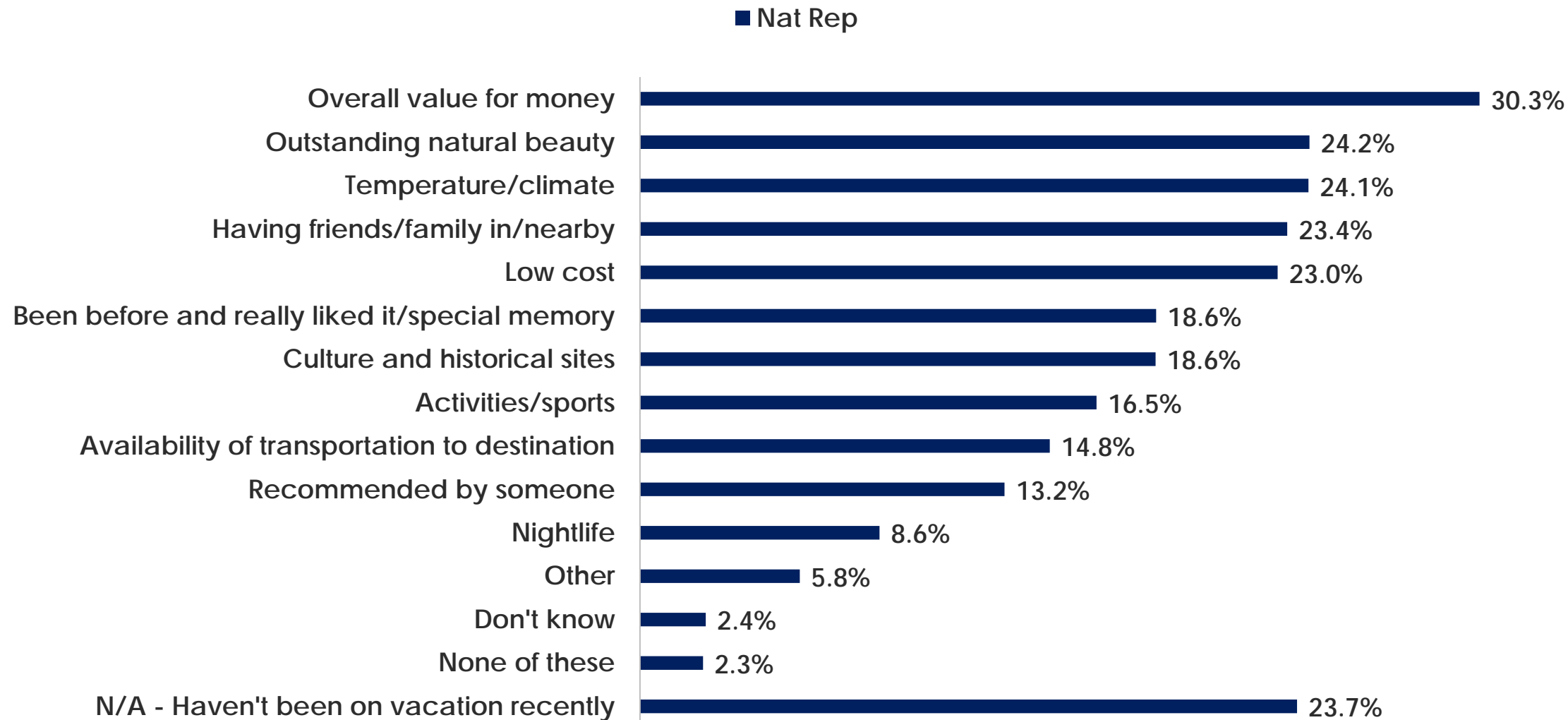


Reason for choosing most recent leisure destination

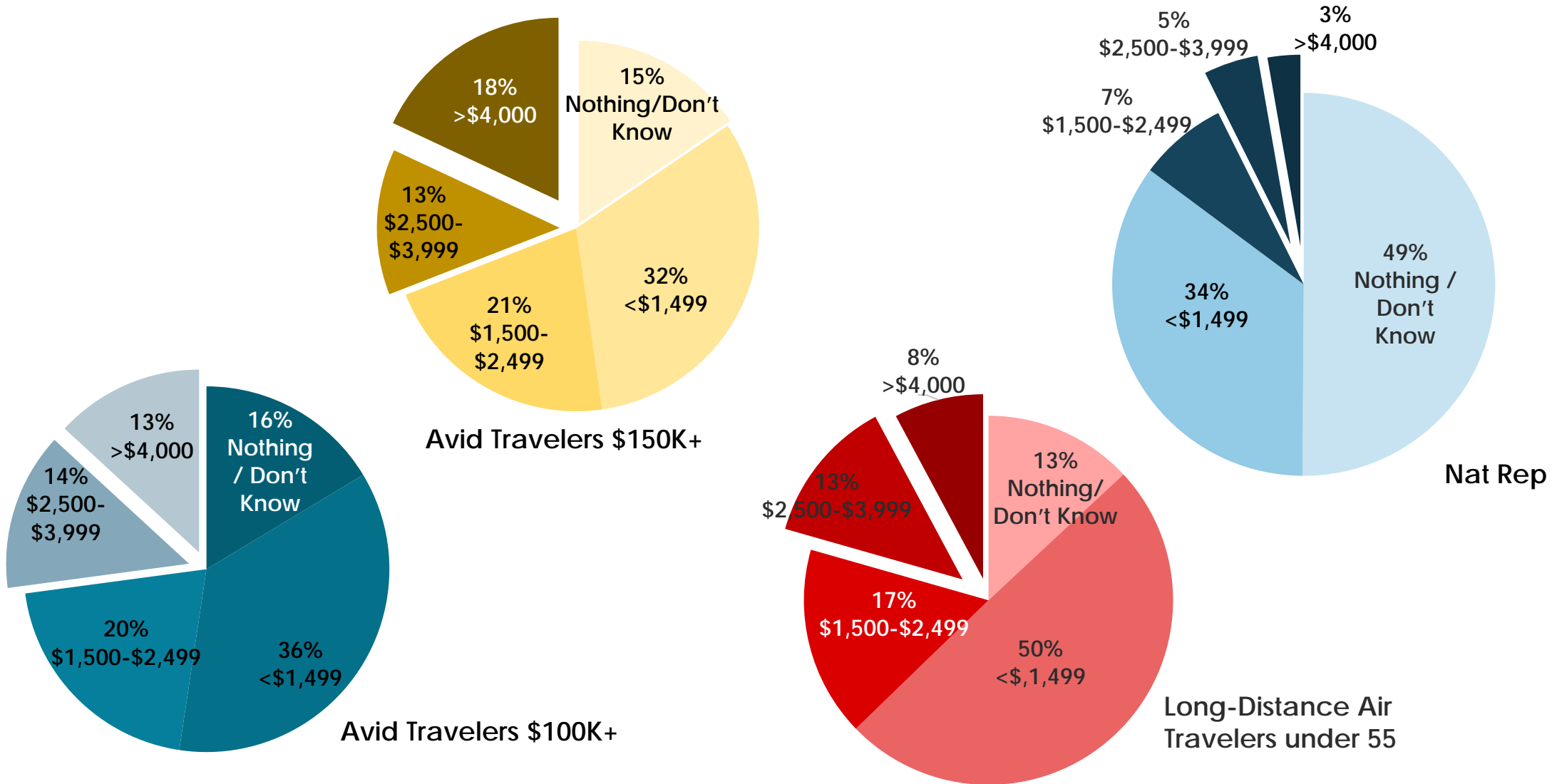
■ Long-Distance Air Traveler under 55



Reason for choosing most recent leisure destination



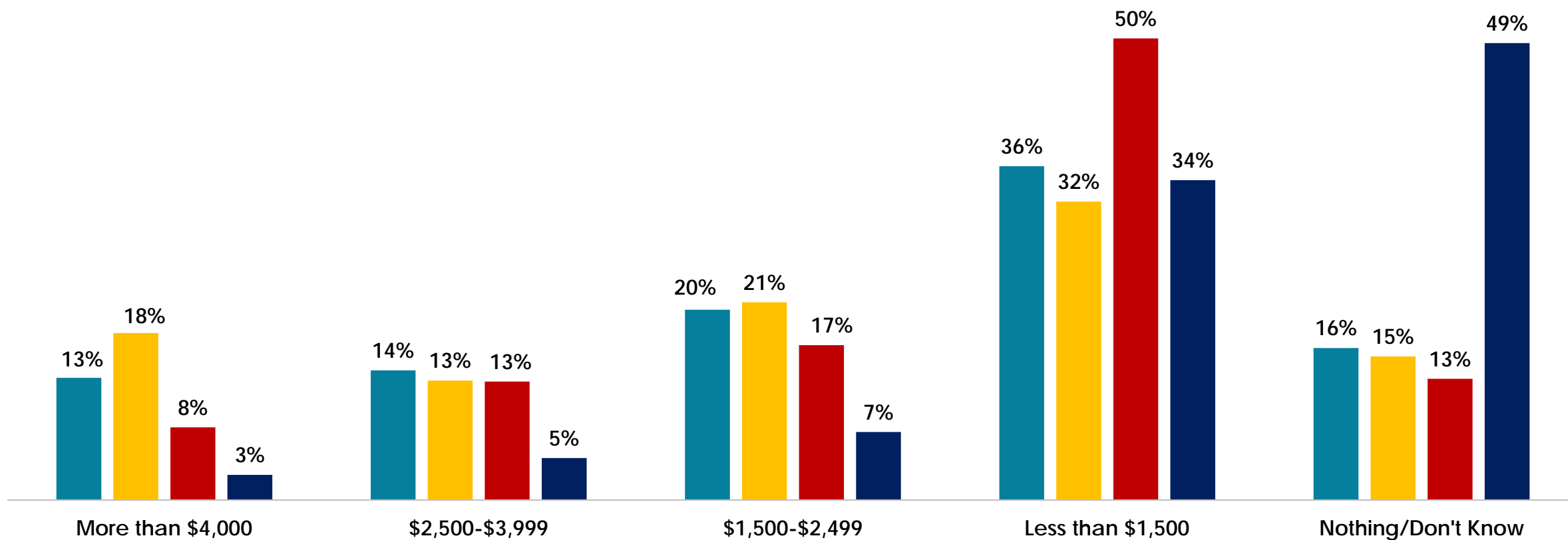
Most recent leisure trip - total spend



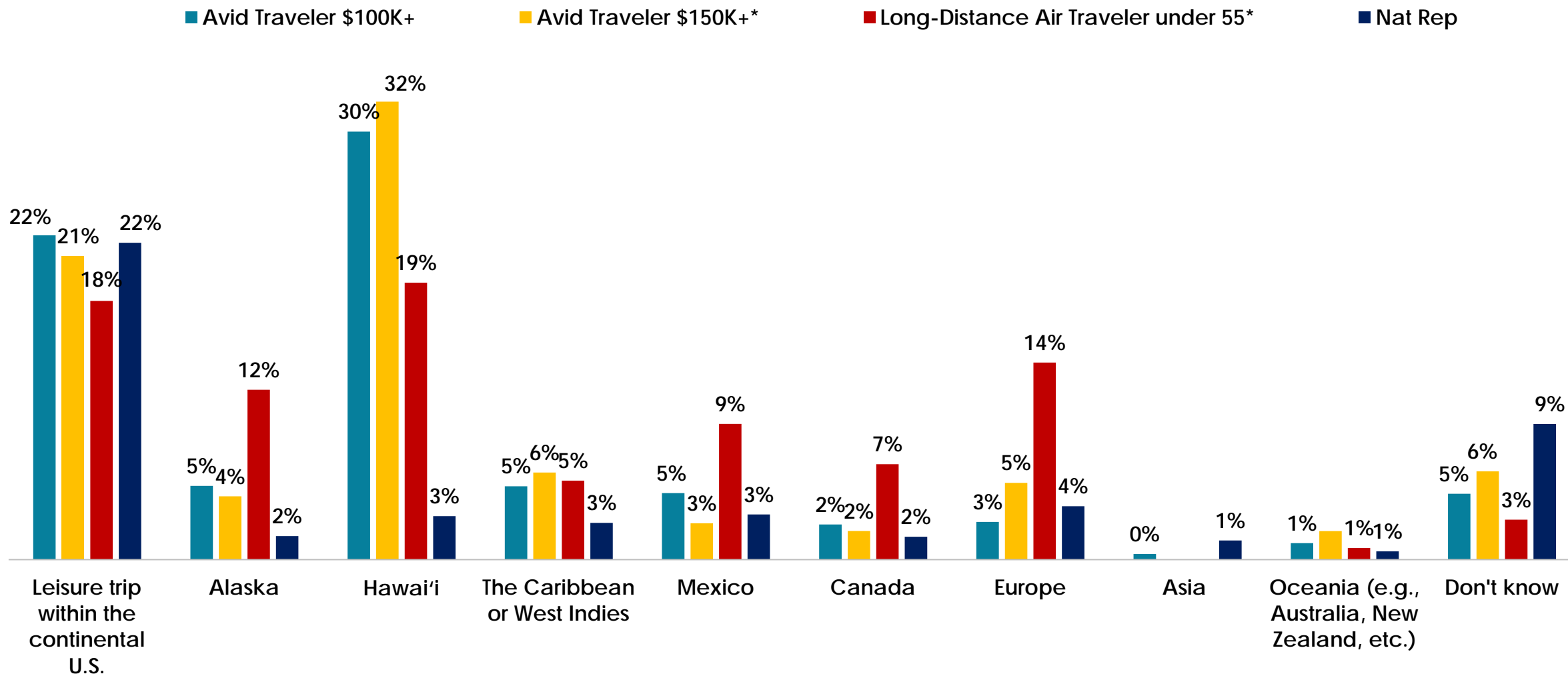
Based on Hawai'i Tourism Authority data, the average U.S. per person per trip spend for 2019 was \$1,693.32.

Most recent leisure trip - total spend

■ Avid Traveler \$100K+
 ■ Avid Traveler \$150K+
 ■ Long-Distance Air Traveler under 55
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Leisure trip - next destination



*YouGov sample size <100

Source: HVCB analysis of YouGov data provided by HTA as of July 11, 2021

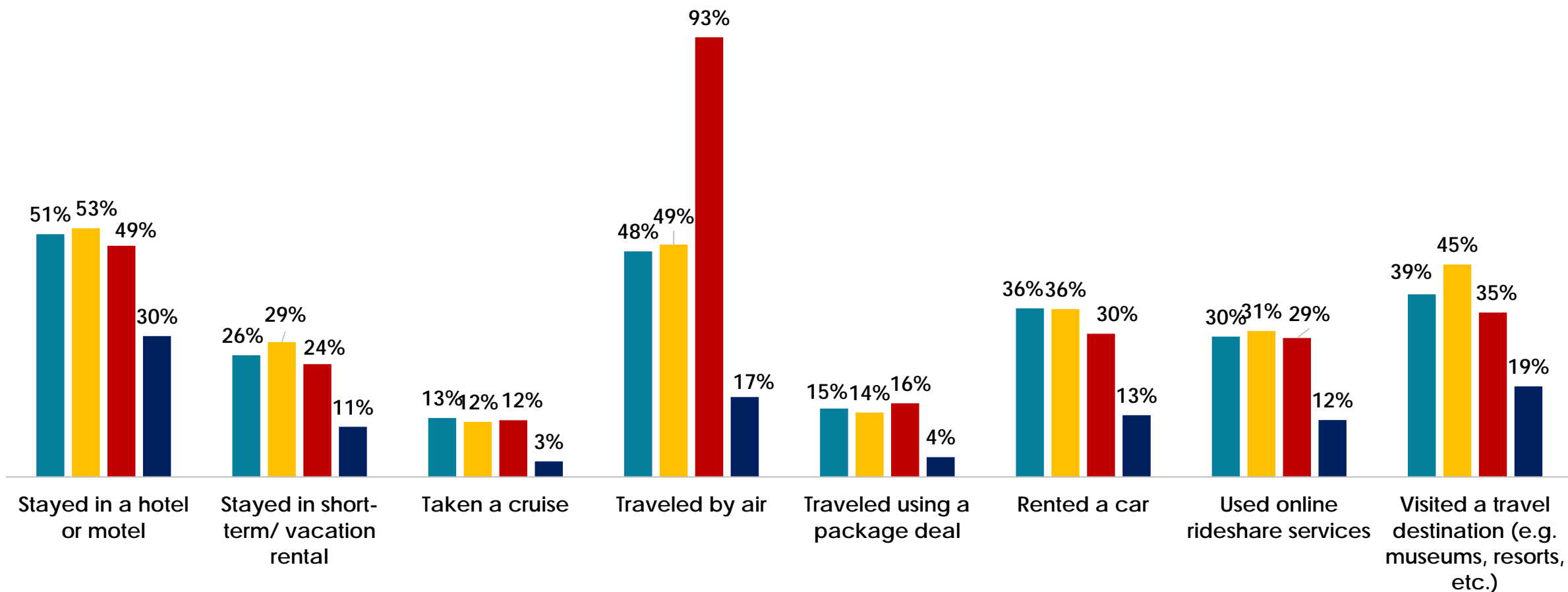
Leisure trip - activities in last 12 months

■ Avid Traveler \$100K+

■ Avid Traveler \$150K+

■ Long-Distance Air Traveler under 55

■ Nat Rep



Travel Mindset

■ Avid Traveler \$100K+
 ■ Avid Traveler \$150K+
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 ■ Nat Rep



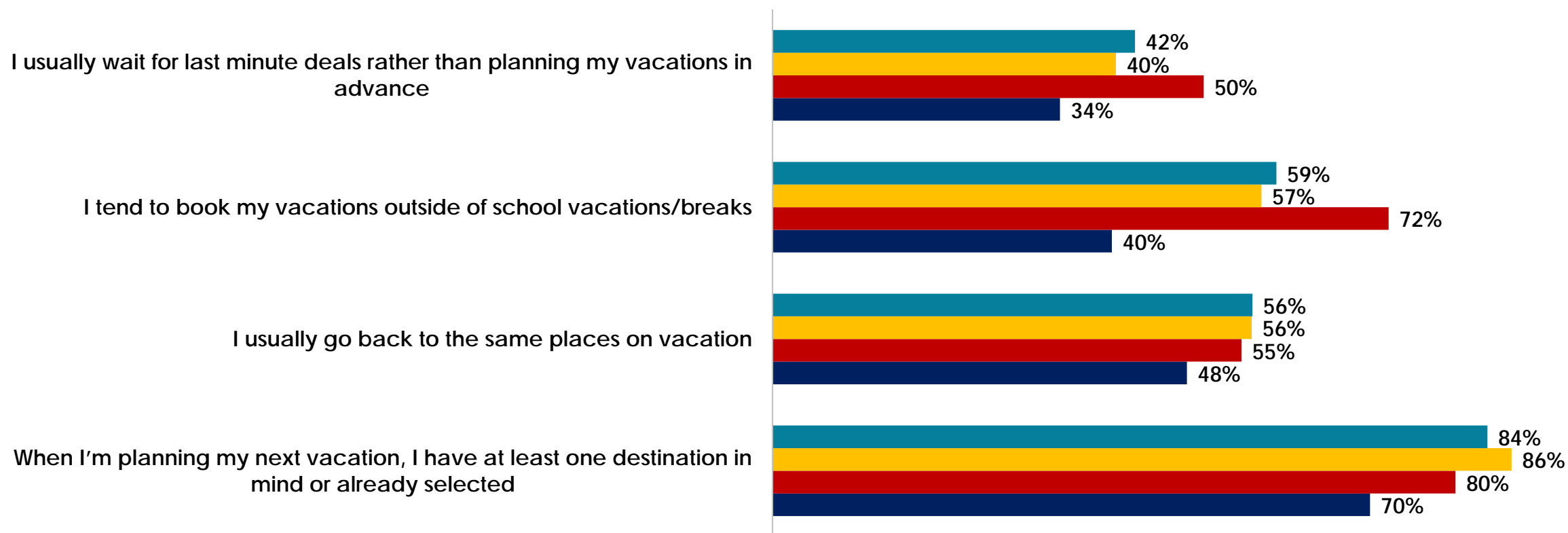
Travel Activities

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Booking & Spending Attitudes

■ Avid Traveler \$100K+
 ■ Avid Traveler \$150K+
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Booking & Spending Attitudes

