

COVID-19 Impact on U.S. Avid Travelers

An HVCB analysis of YouGov data provided by HTA as of September 12, 2021

Reported on September 23, 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)

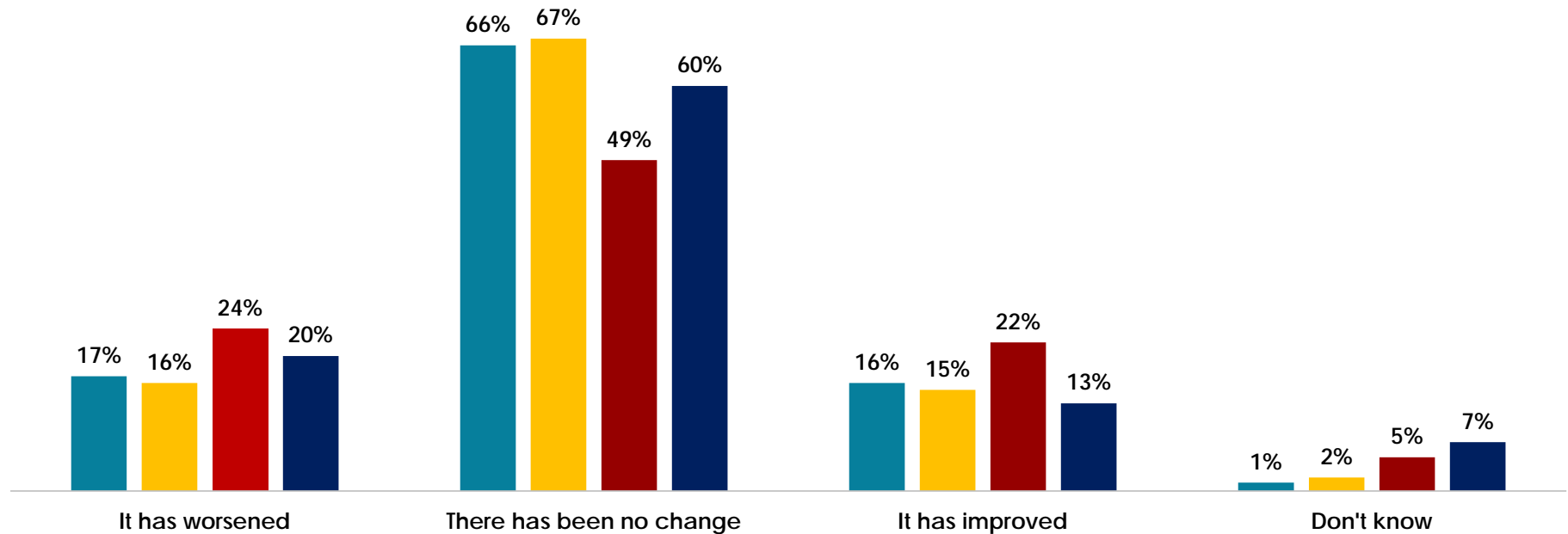
- Representative of U.S. adults in terms of age, gender, social class and education



Travelers' Pandemic Outlook

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

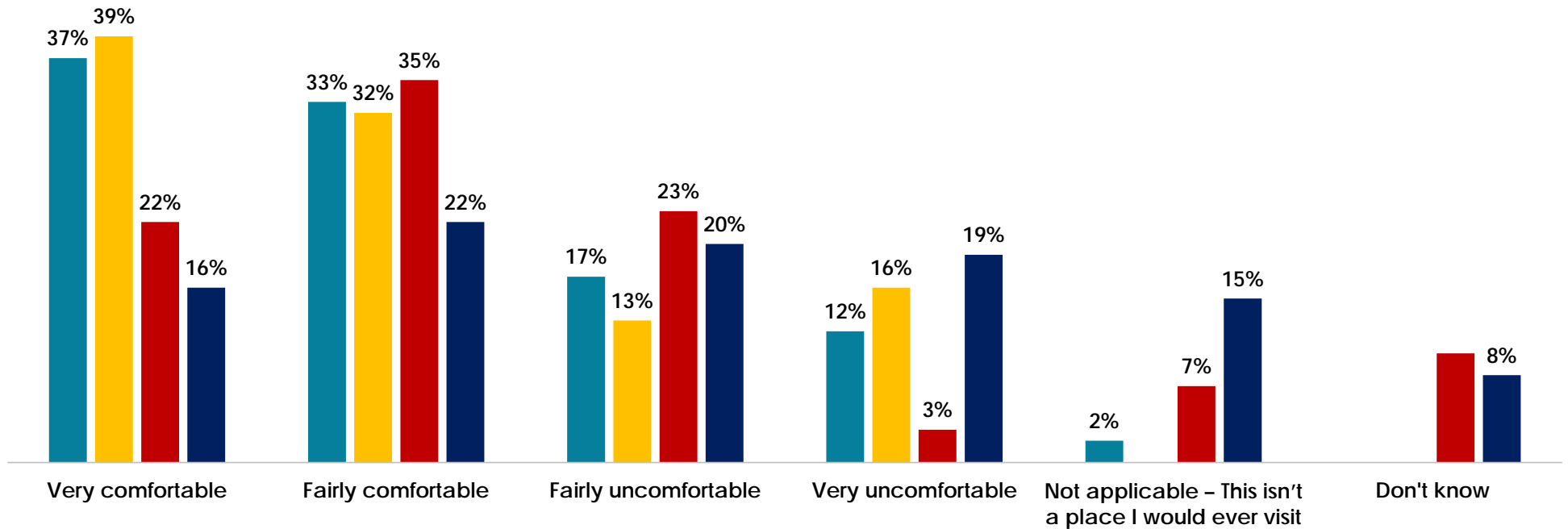
■ Avid Traveler \$100K+ ■ Avid Traveler \$150K+ ■ Long-Distance Air Traveler under 55 ■ Nat Rep



Source: HVCB analysis of YouGov data provided by HTA as of September 12, 2021

Level of comfort visiting an airport right now

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



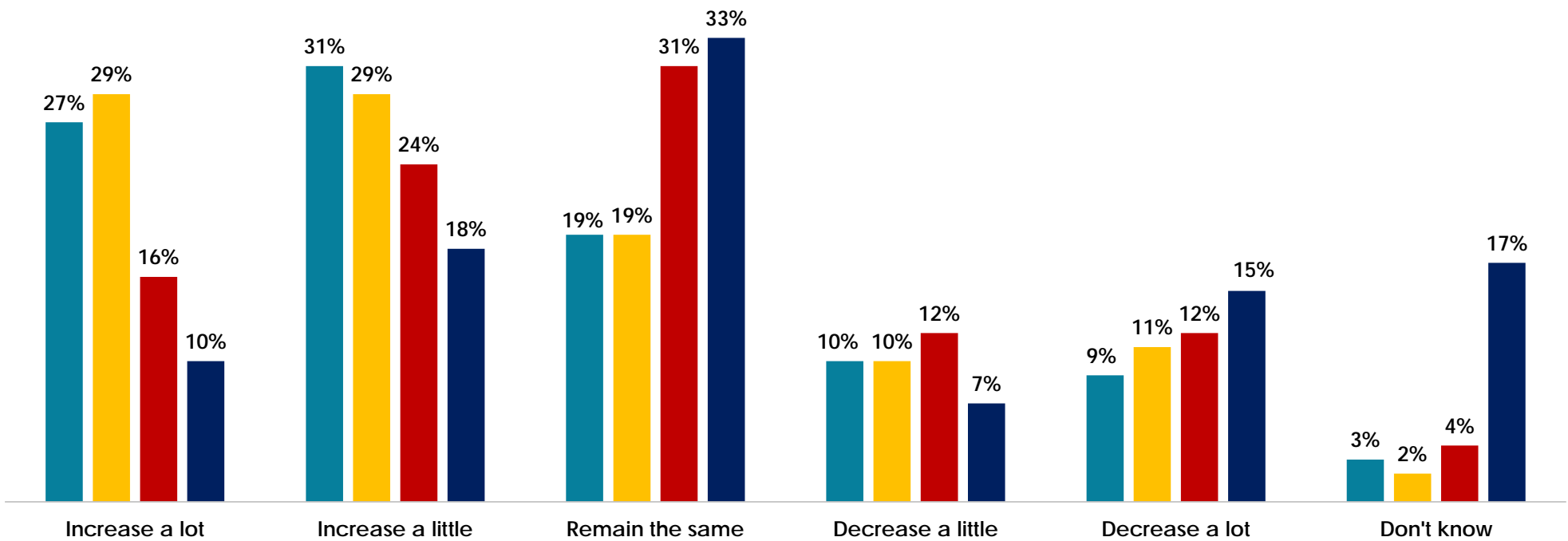
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Future Travel Plans

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

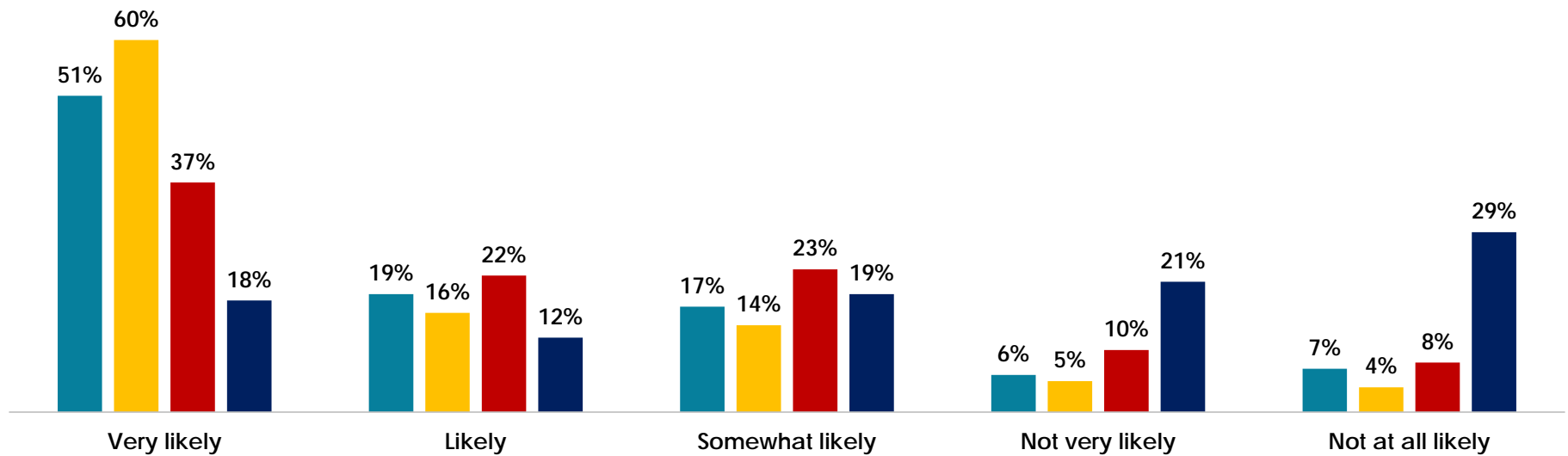
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Future Travel – Likelihood of purchasing travel or leisure services in the next 12 months

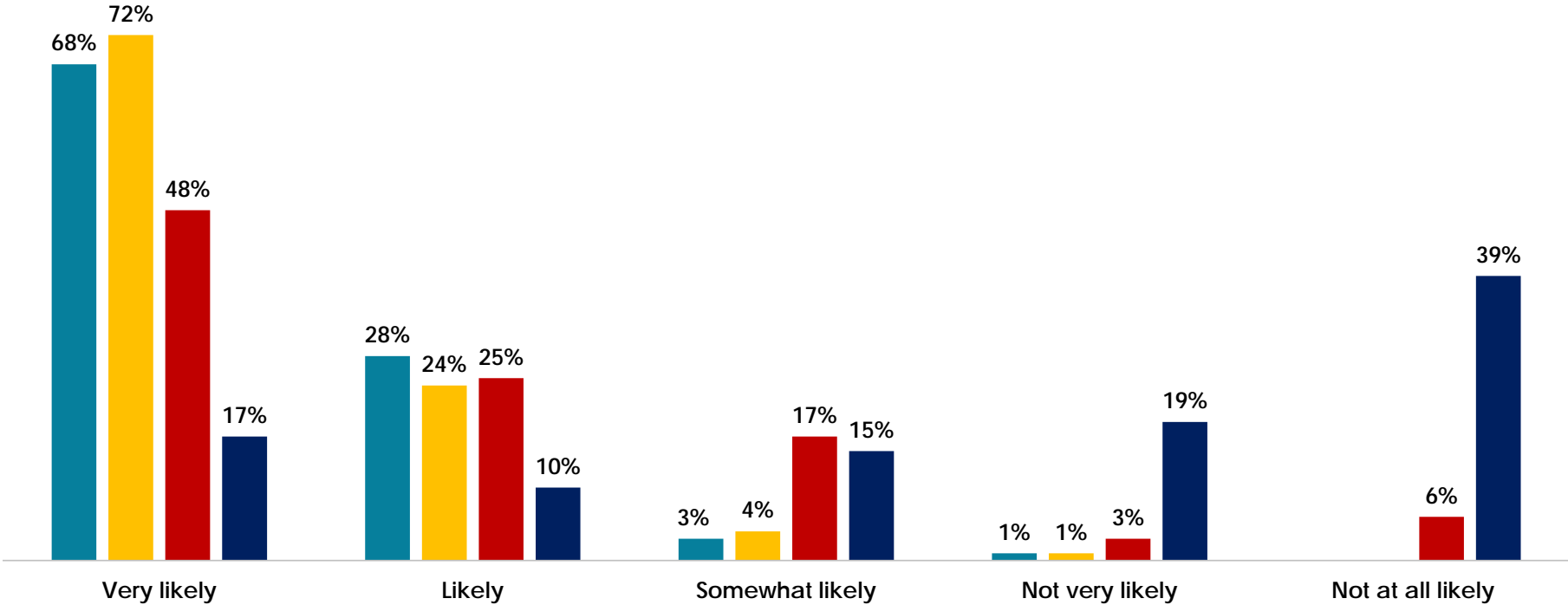
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Future Travel – Likelihood of booking a flight in the next 12 months

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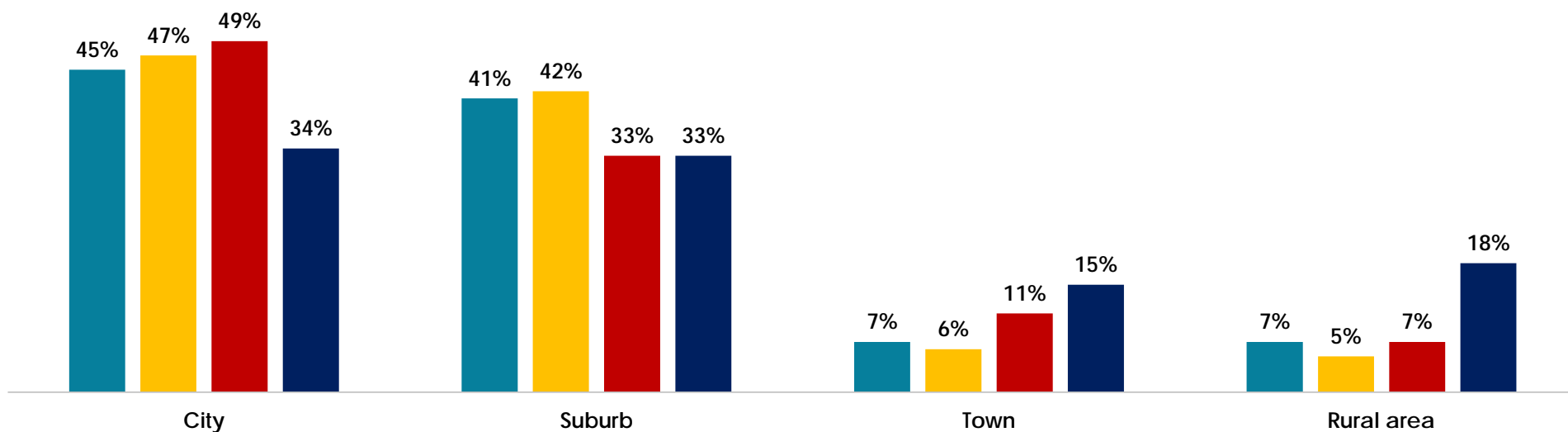


Traveler Profiles

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

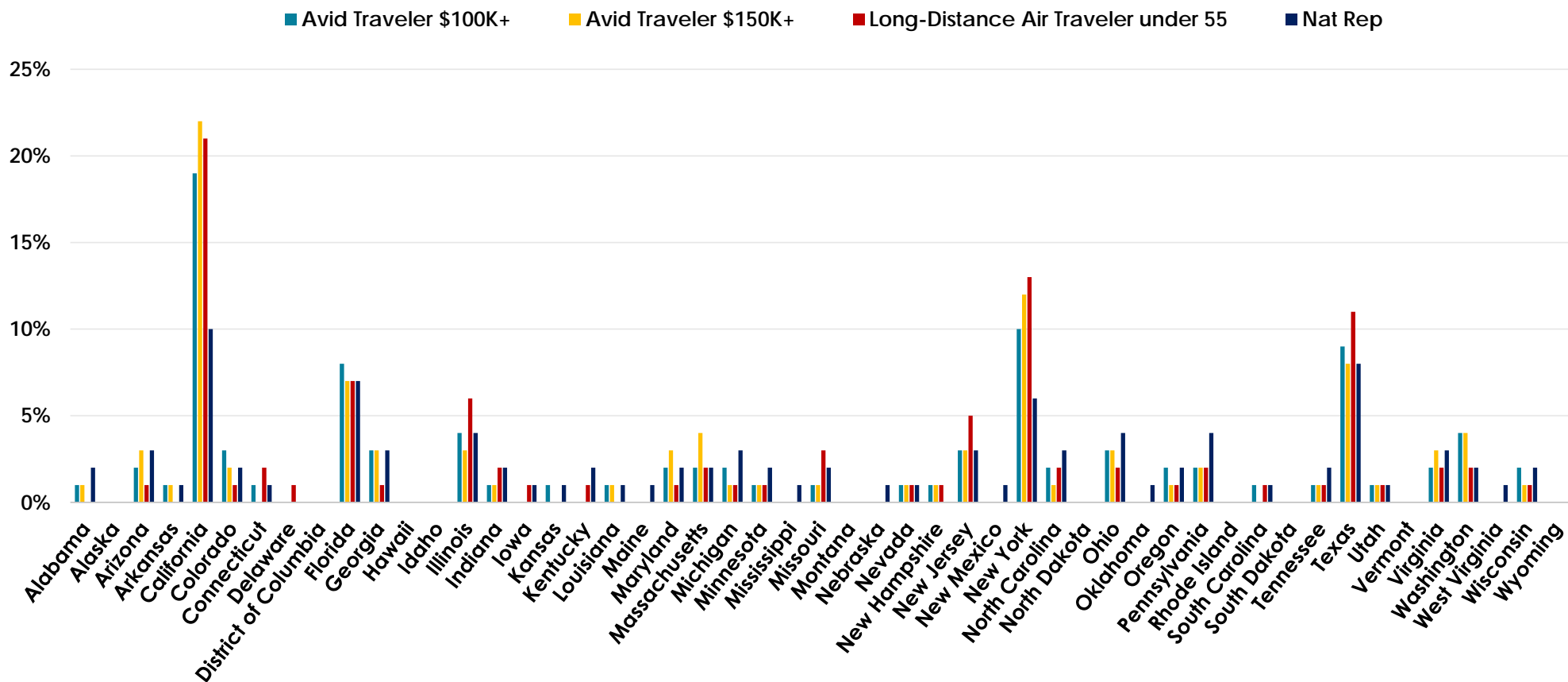
Type of Area Living In

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



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State of Residence



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Top 10 States of Residence by Segment

Avid Traveler \$100K, 25-54, individual	
California	18.5%
New York	10.1%
Texas	8.1%
Florida	8.1%
Illinois	4.2%
Washington	4.0%
New Jersey	3.2%
Colorado	3.1%
Ohio	2.9%
Georgia	2.8%

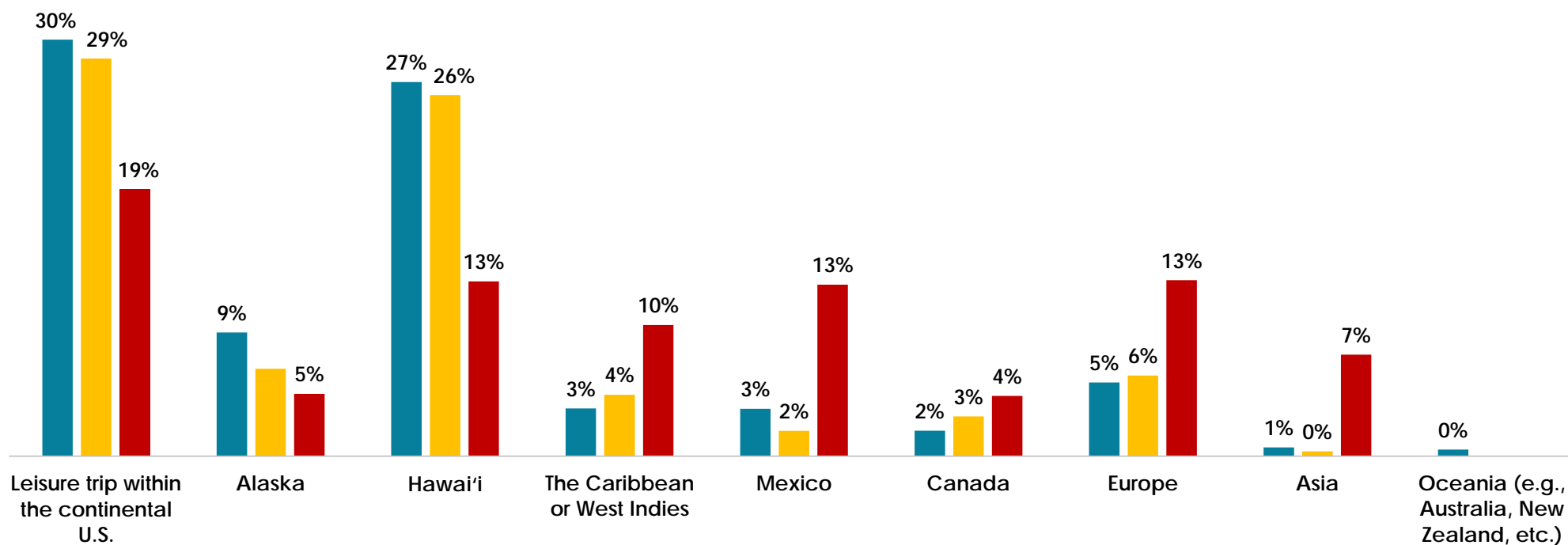
Avid Traveler \$150K, 25-54, 2+ household	
California	22.2%
New York	12.3%
Texas	7.7%
Florida	7.2%
Washington	3.7%
Massachusetts	4.1%
Maryland	3.5%
Illinois	3.3%
New Jersey	3.1%
Virginia	3.0%

Long-Distance Air Traveler under 55	
California	20.7%
New York	12.7%
Texas	10.7%
Florida	7.1%
Illinois	5.8%
New Jersey	5.2%
Missouri	2.9%
Virginia	2.3%
Connecticut	2.3%
Indiana	2.3%

Nat Rep	
California	10.3%
Texas	8.4%
Florida	7.1%
New York	6.5%
Pennsylvania	4.4%
Ohio	3.7%
Illinois	3.7%
Georgia	3.1%
North Carolina	2.8%
Michigan	2.8%

Leisure trip – most recent destination

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



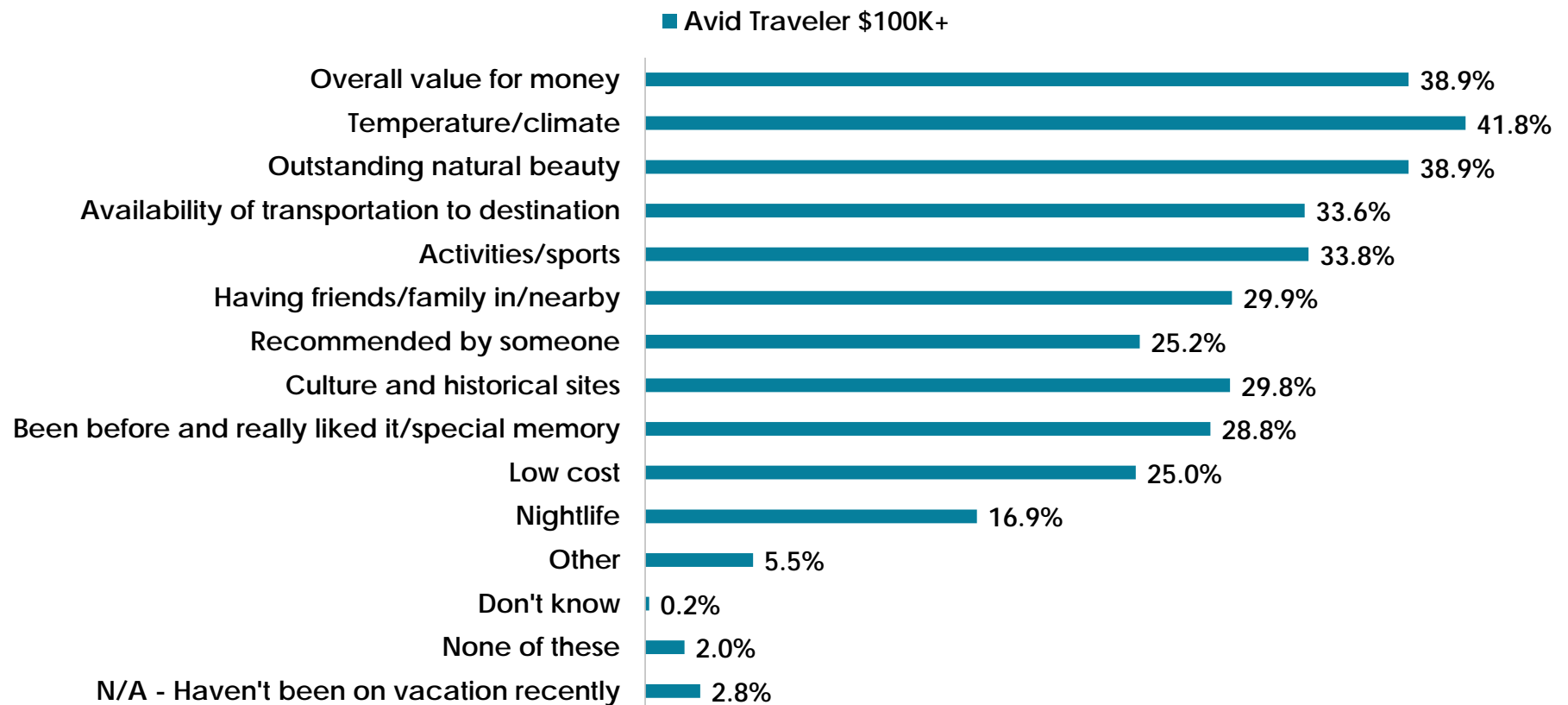
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Reason for choosing most recent leisure destination

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	38.9%	31.4%	22.9%	30.3%
The temperature/climate	41.8%	45.9%	32.0%	24.1%
Outstanding natural beauty	38.9%	34.4%	19.5%	24.3%
Availability of transportation to destination	33.6%	41.4%	21.4%	14.5%
Activities/sports	33.8%	34.6%	26.8%	16.4%
Having friends/family in/nearby	29.9%	32.4%	23.0%	24.0%
Recommended by someone	25.2%	26.7%	21.5%	13.2%
Culture and historical sites	29.8%	38.9%	24.5%	18.4%
Been before and really liked it/special memory	28.8%	27.9%	18.6%	18.8%
Low cost	25.0%	18.7%	24.0%	23.0%
Nightlife	16.9%	15.1%	24.1%	8.5%
Other	5.5%	4.2%	5.7%	5.7%
Don't know	0.2%	0.0%	0.0%	2.4%
None of these	2.0%	1.9%	3.9%	2.1%
N/A - Haven't been on vacation recently	2.8%	0.9%	3.3%	23.8%

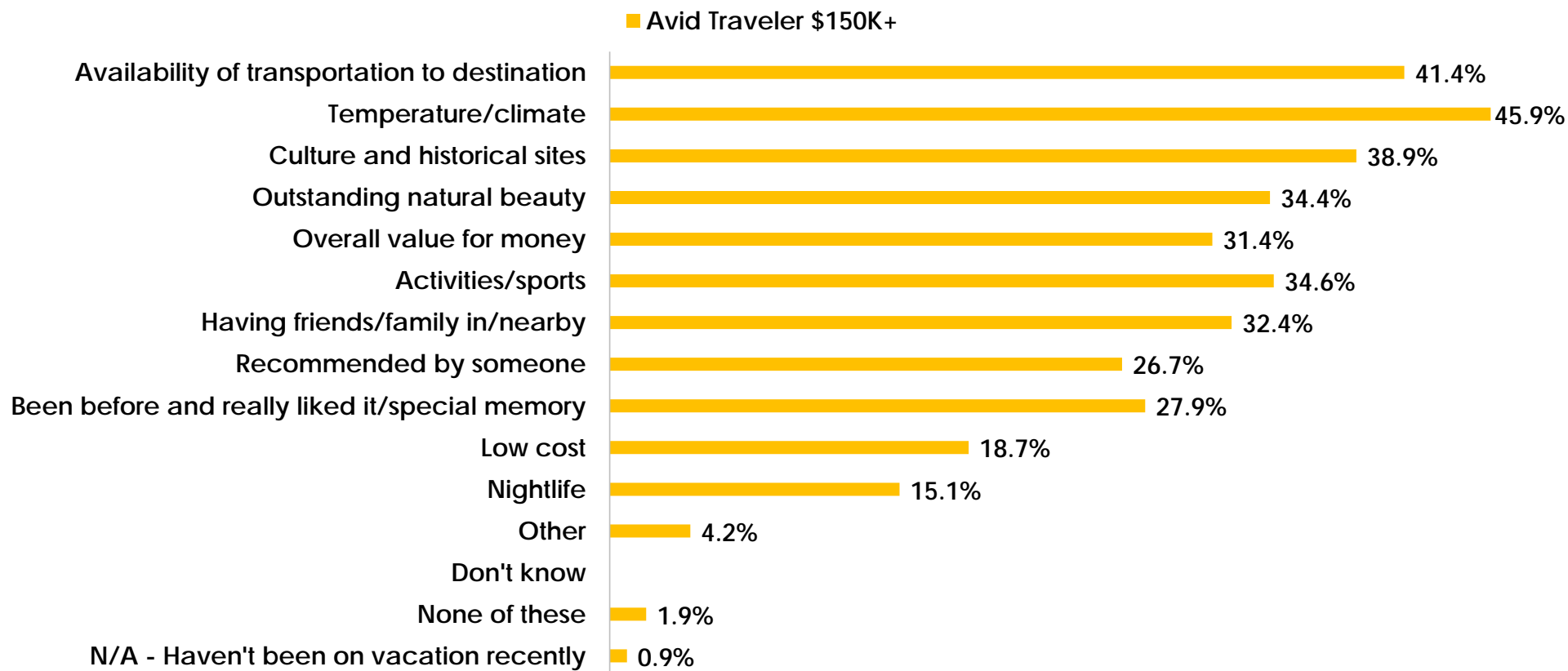
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Reason for choosing most recent leisure destination



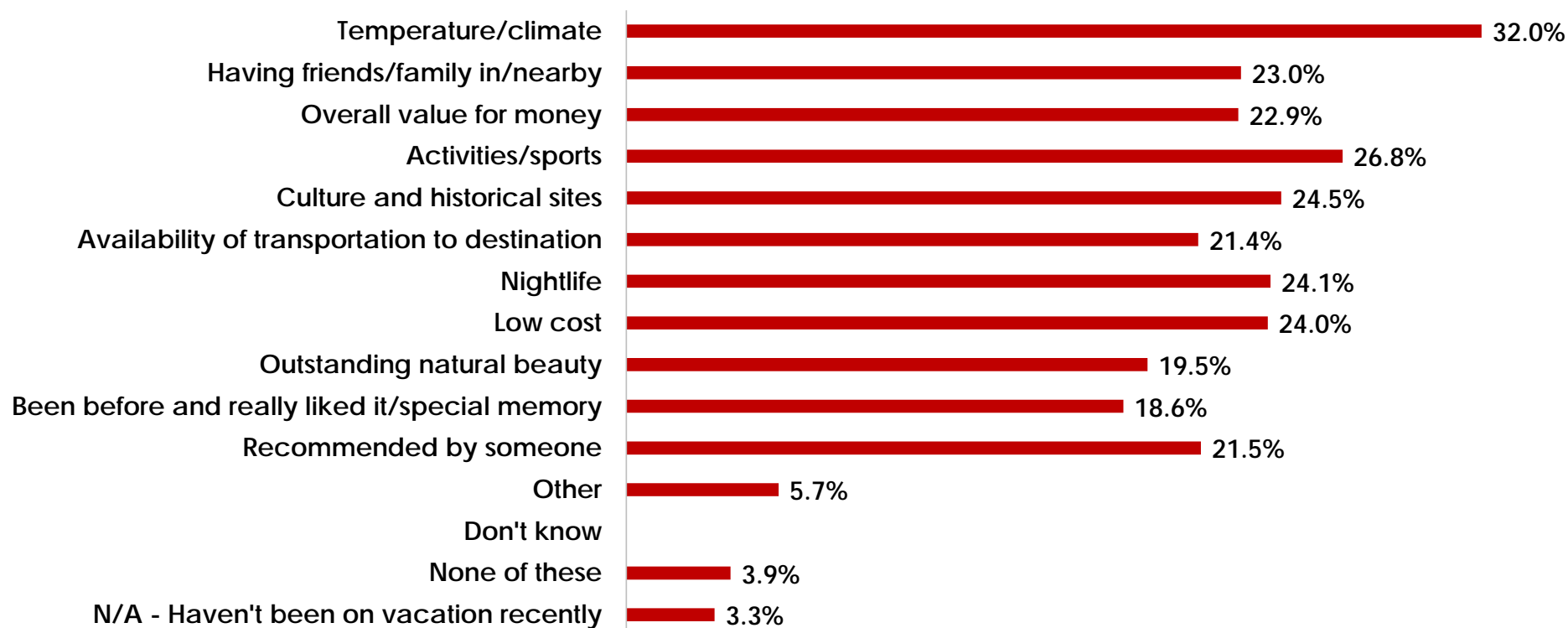
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Reason for choosing most recent leisure destination

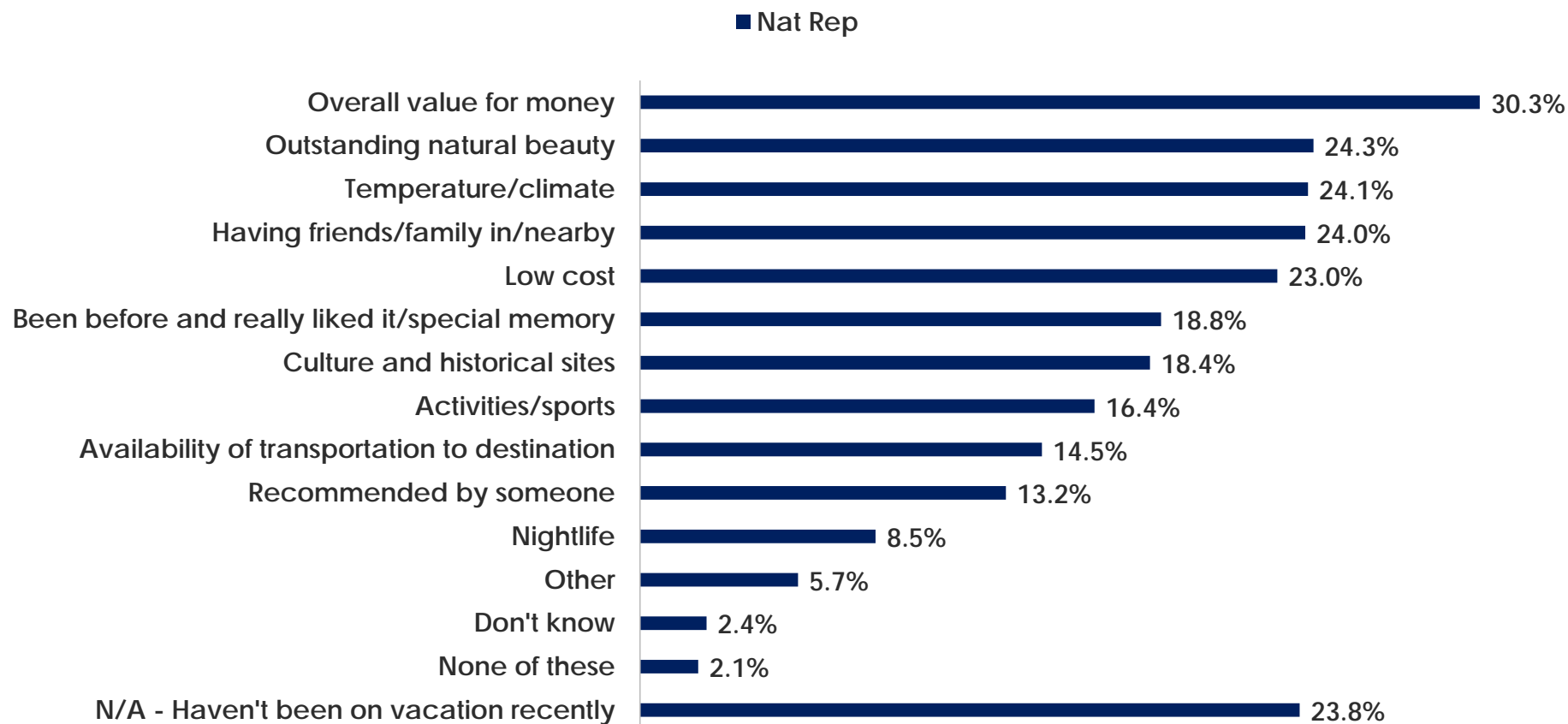


Reason for choosing most recent leisure destination

■ Long-Distance Air Traveler under 55

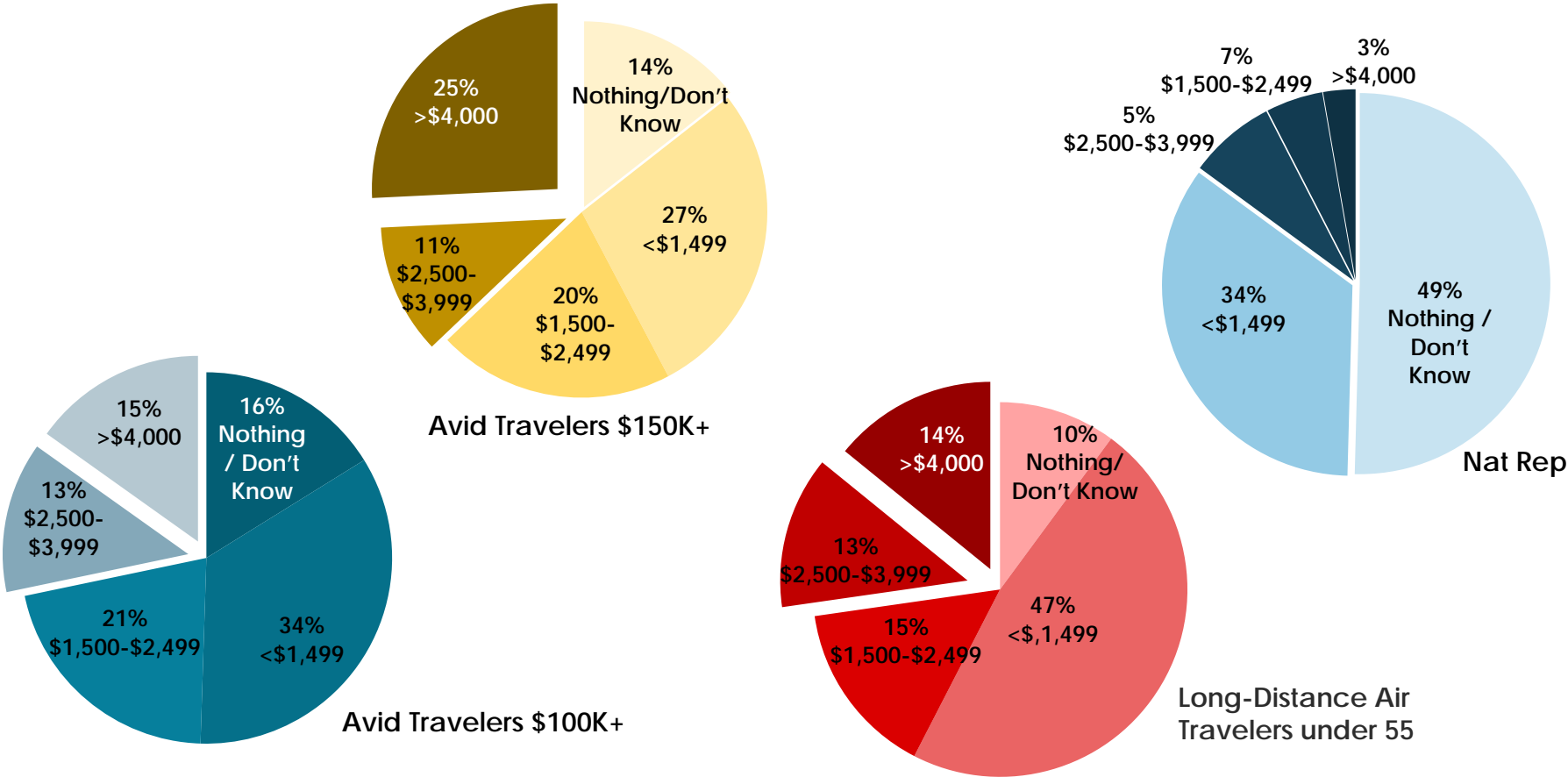


Reason for choosing most recent leisure destination



Source: HVCB analysis of YouGov data provided by HTA as of September 12, 2021

Most recent leisure trip - total spend

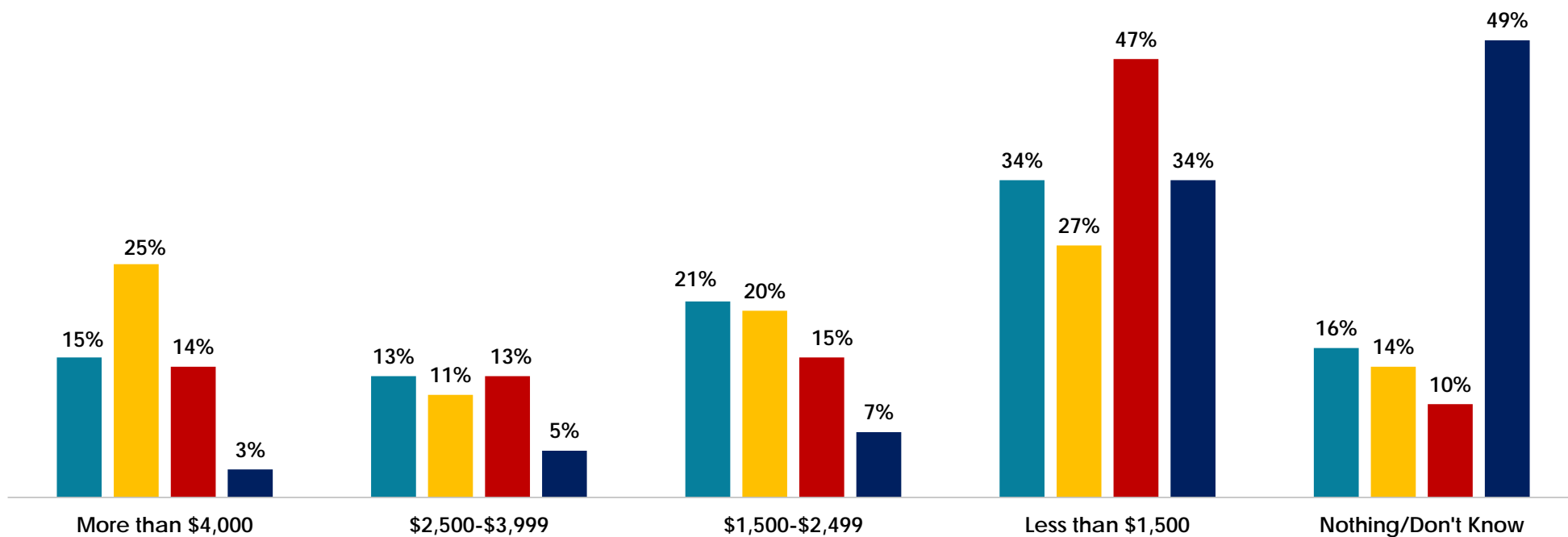


Based on Hawai'i Tourism Authority data, the average U.S. per person per trip spend for 2019 was \$1,693.32.

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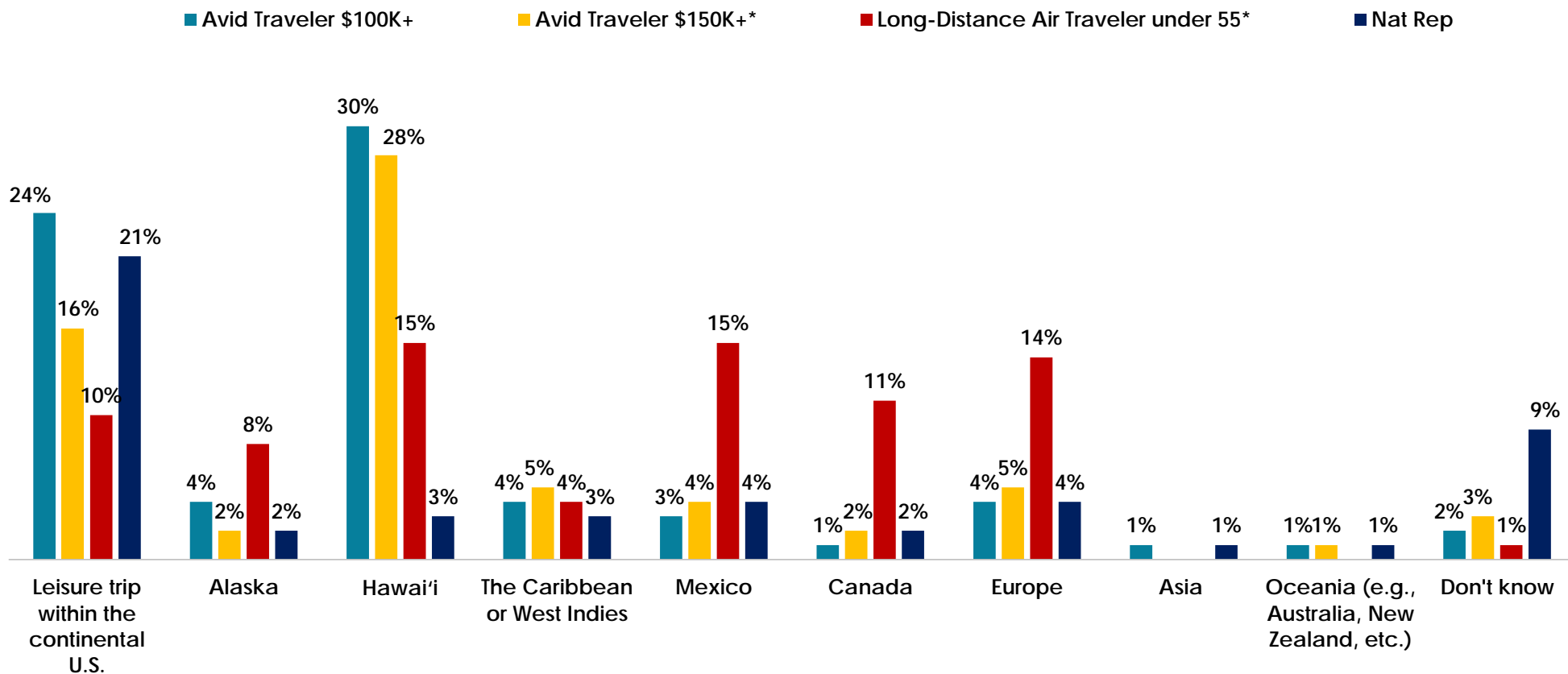
Most recent leisure trip - total spend

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Leisure trip - next destination

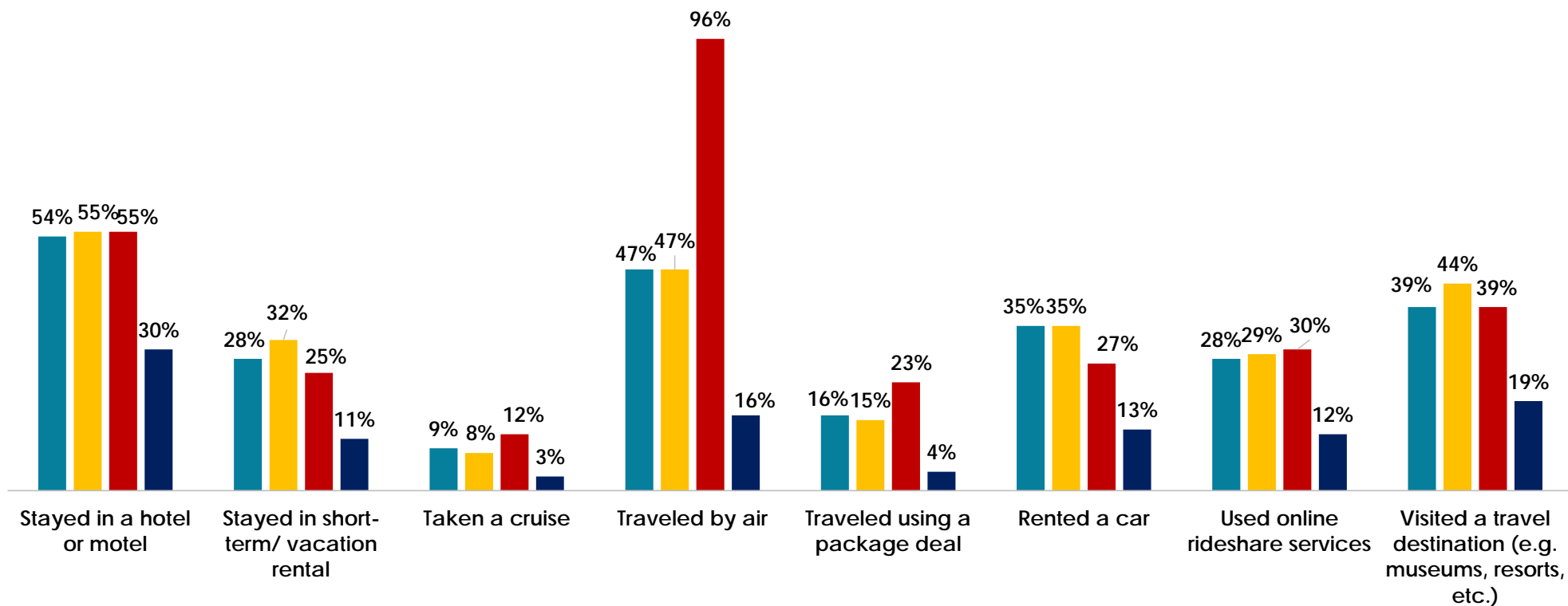


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Leisure trip - activities in last 12 months

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Travel Mindset

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Travel Activities

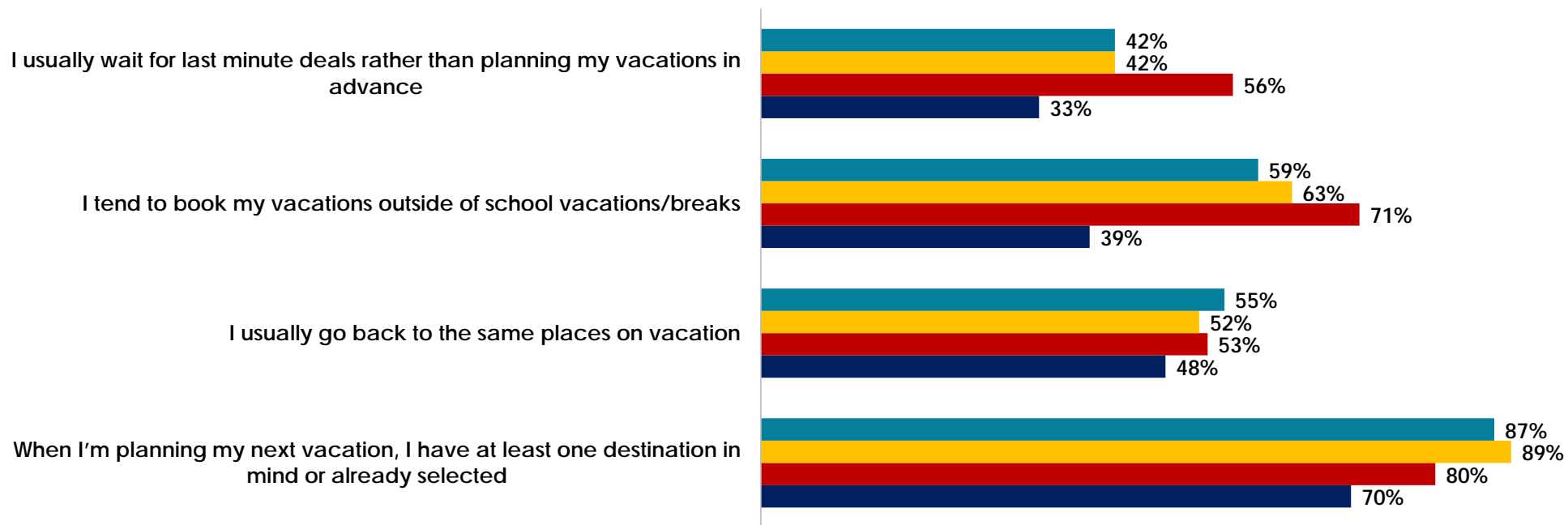
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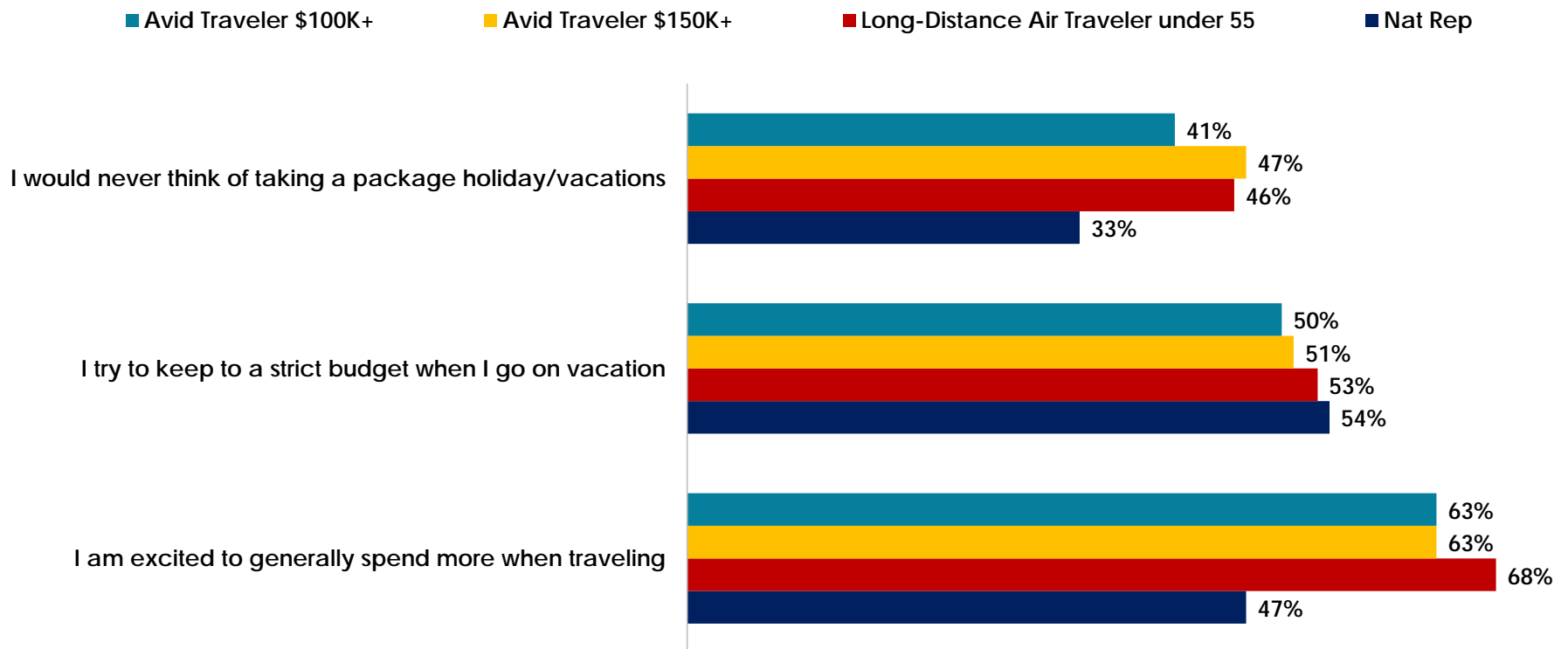
Booking & Spending Attitudes

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