

COVID-19 Impact on U.S. Avid Travelers

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

Reported on April 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)

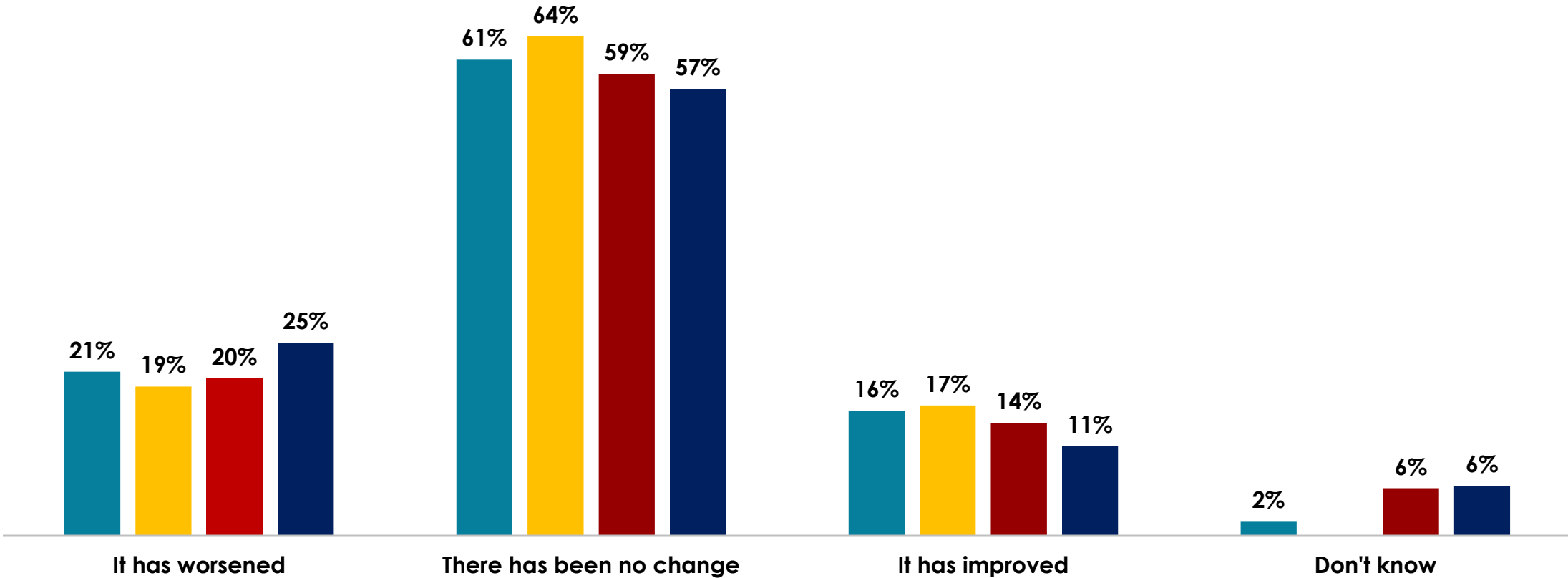
- Representative of U.S. adults in terms of age, gender, social class and education



Travelers' Pandemic Outlook

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

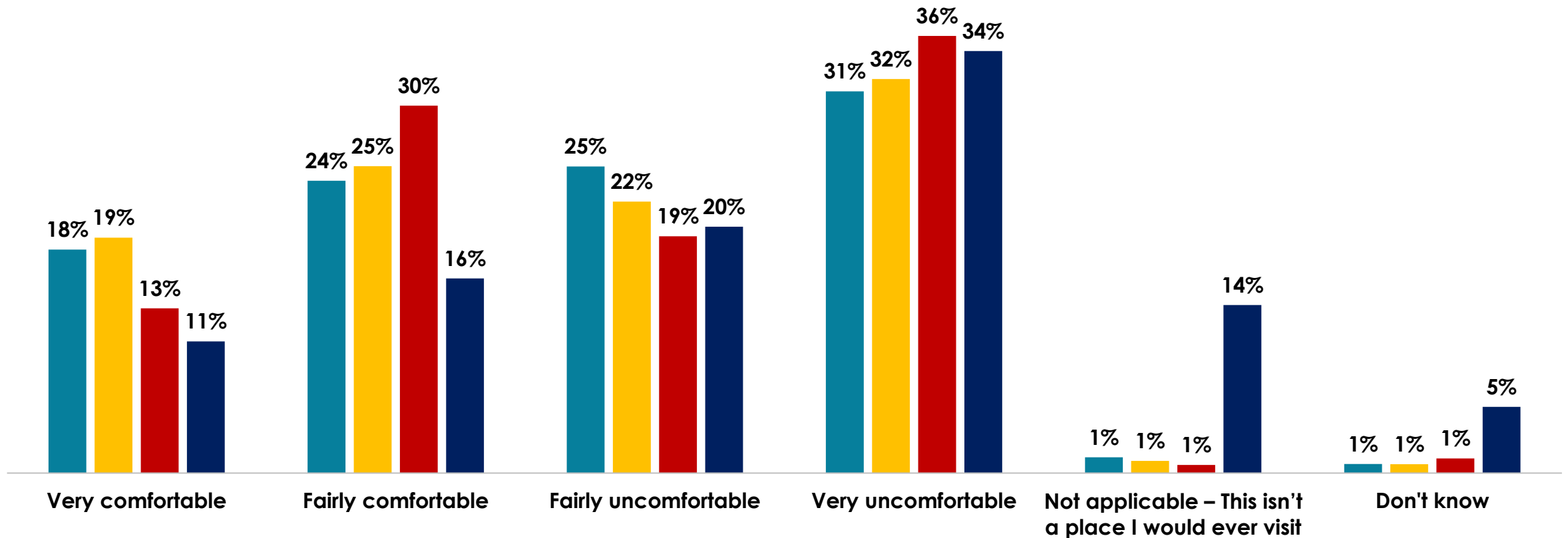
■ Avid Traveler \$100K+ ■ Avid Traveler \$150K+ ■ Long-Distance Air Traveler under 55 ■ Nat Rep



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

Level of comfort visiting an airport right now

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

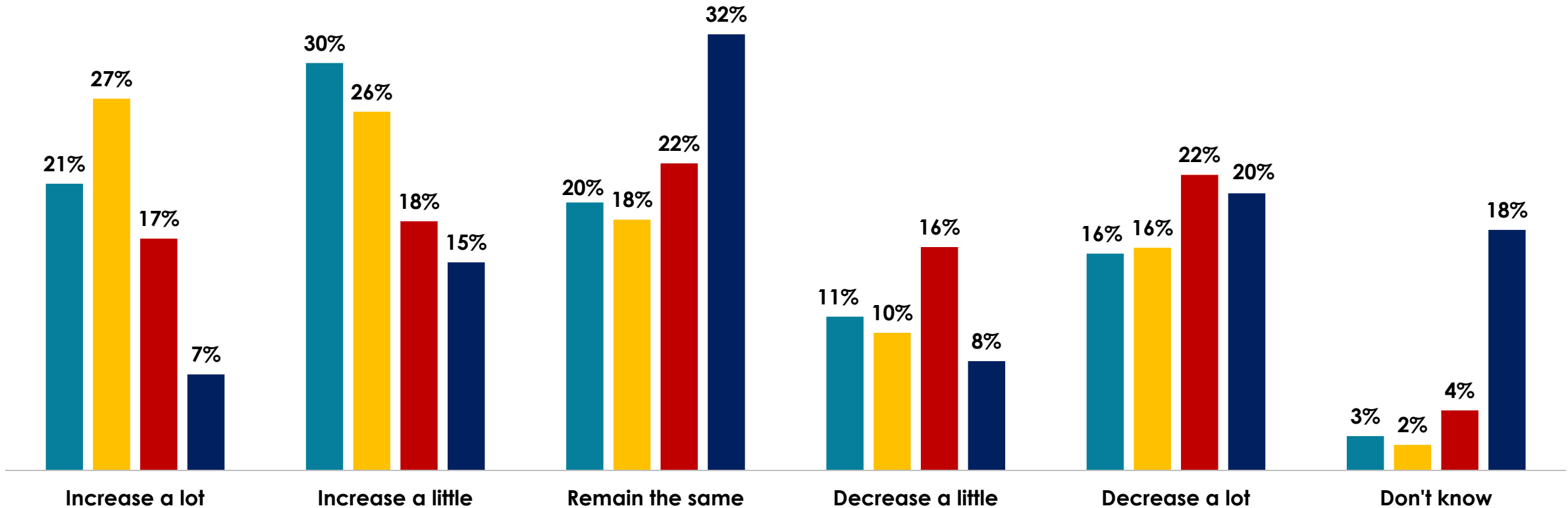




Future Travel Plans

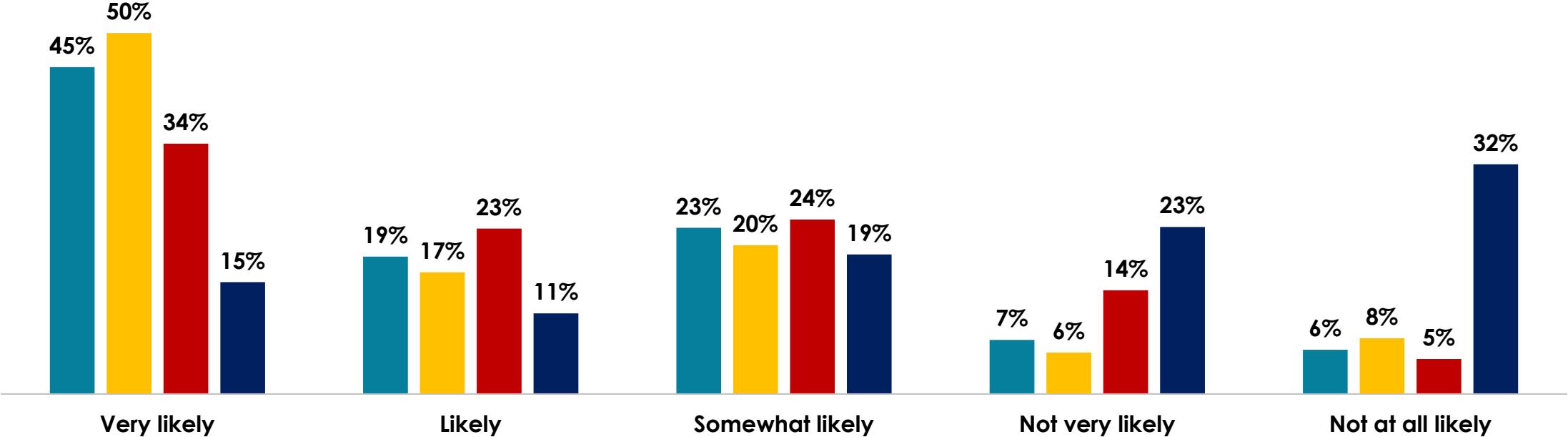
Future Travel – Expected change to air travel in the next 12 months

■ Avid Traveler \$100K+
 ■ Avid Traveler \$150K+
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Future Travel – Likelihood of purchasing travel or leisure services in the next 12 months

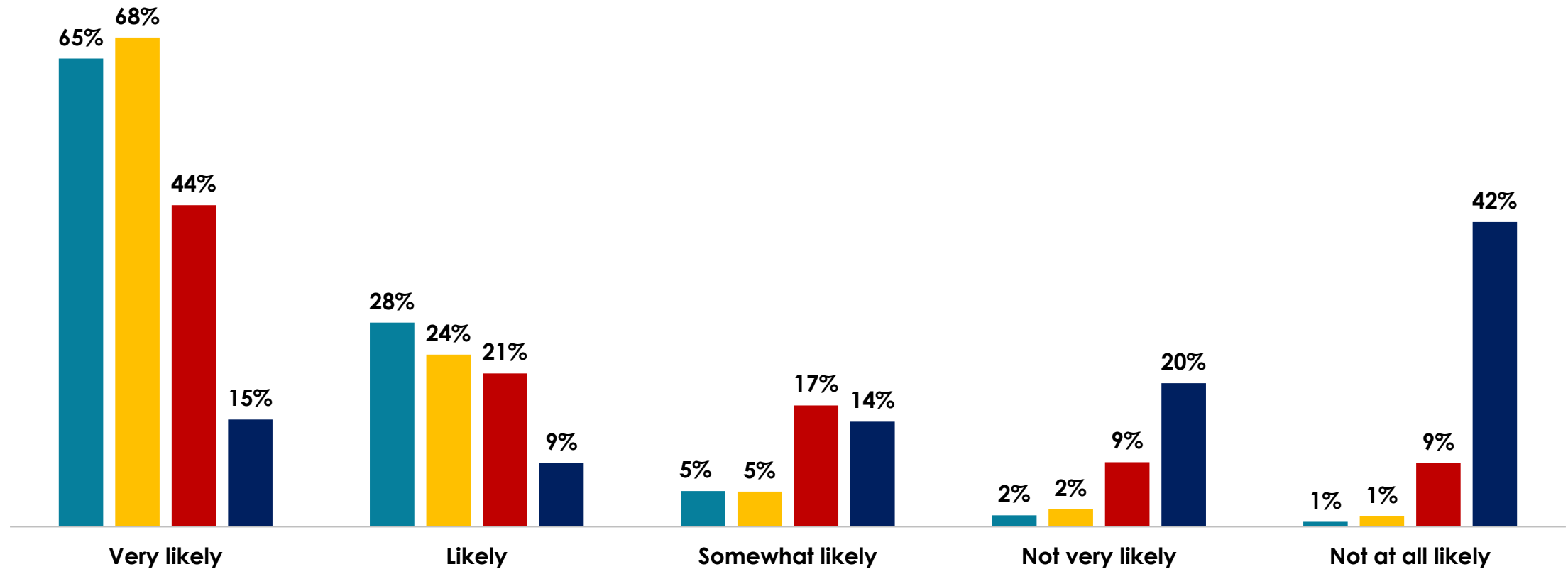
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Future Travel – Likelihood of booking a flight in the next 12 months

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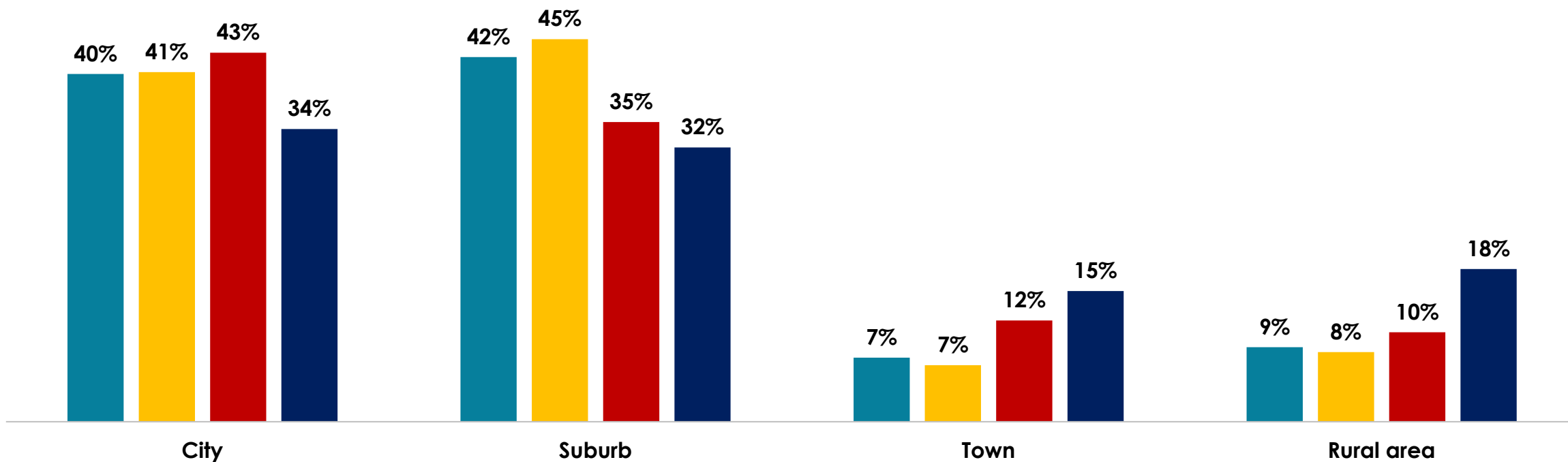


Traveler Profiles

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

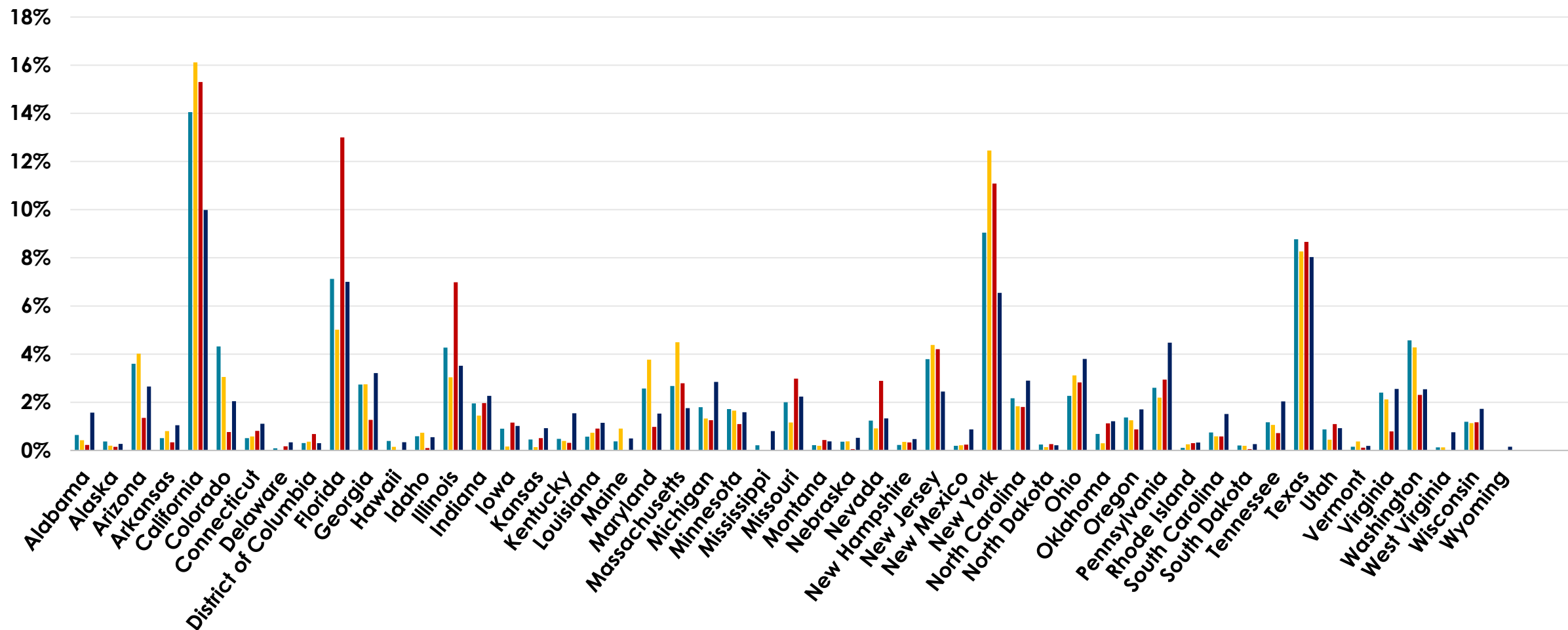
Type of Area Living In

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



State of Residence

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



Top 10 States of Residence by Segment

Avid Traveler (\$100K, 25-54, individual)	
California	14.1%
New York	9.0%
Texas	8.8%
Florida	7.1%
Washington	4.6%
Colorado	4.3%
Illinois	4.3%
New Jersey	3.8%
Arizona	3.6%
Georgia	2.7%

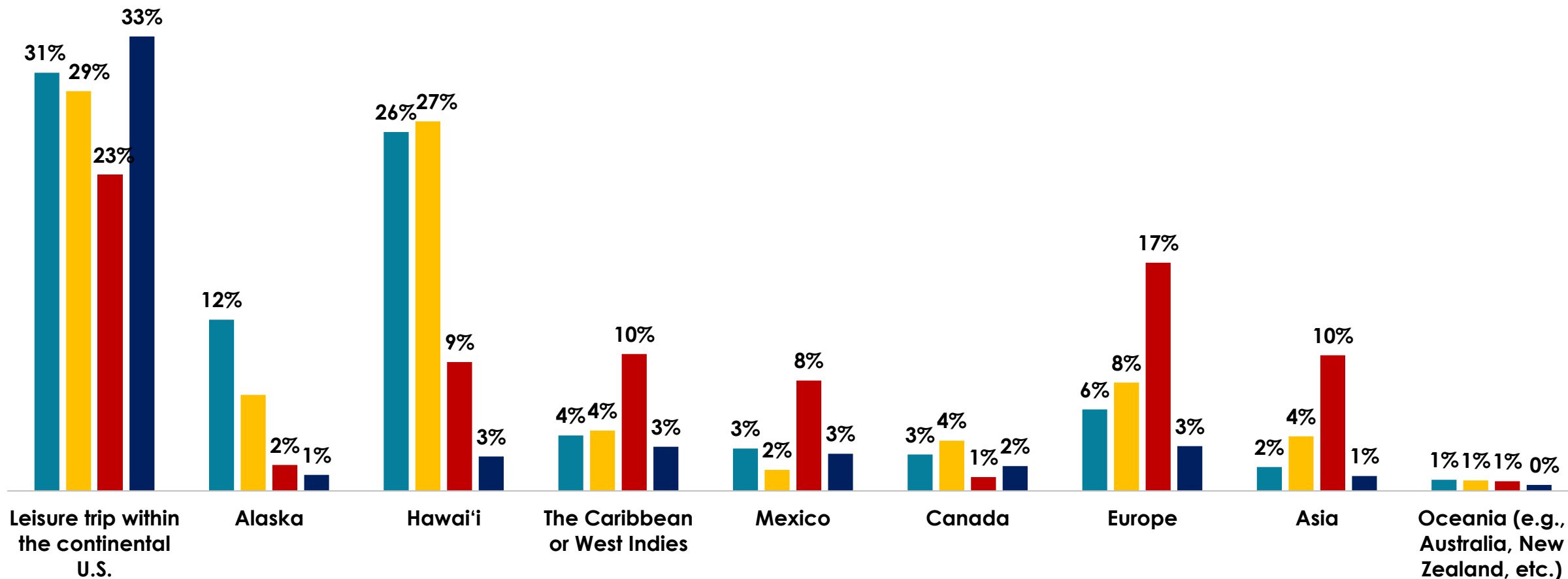
Avid Traveler (\$150K, 25-54, 2+)	
California	16.1%
New York	12.5%
Texas	8.3%
Florida	5.0%
Massachusetts	4.5%
New Jersey	4.4%
Washington	4.3%
Arizona	4.0%
Maryland	3.8%
Ohio	3.1%

Long-Distance Air Traveler under 55	
California	15.3%
Florida	13.0%
New York	11.1%
Texas	8.7%
Illinois	7.0%
New Jersey	4.2%
Missouri	3.0%
Pennsylvania	2.9%
Nevada	2.9%
Ohio	2.8%

Nat Rep	
California	10.0%
Texas	8.0%
Florida	7.0%
New York	6.5%
Pennsylvania	4.5%
Ohio	3.8%
Illinois	3.5%
Georgia	3.2%
North	2.9%
Michigan	2.8%

Leisure trip – most recent destination

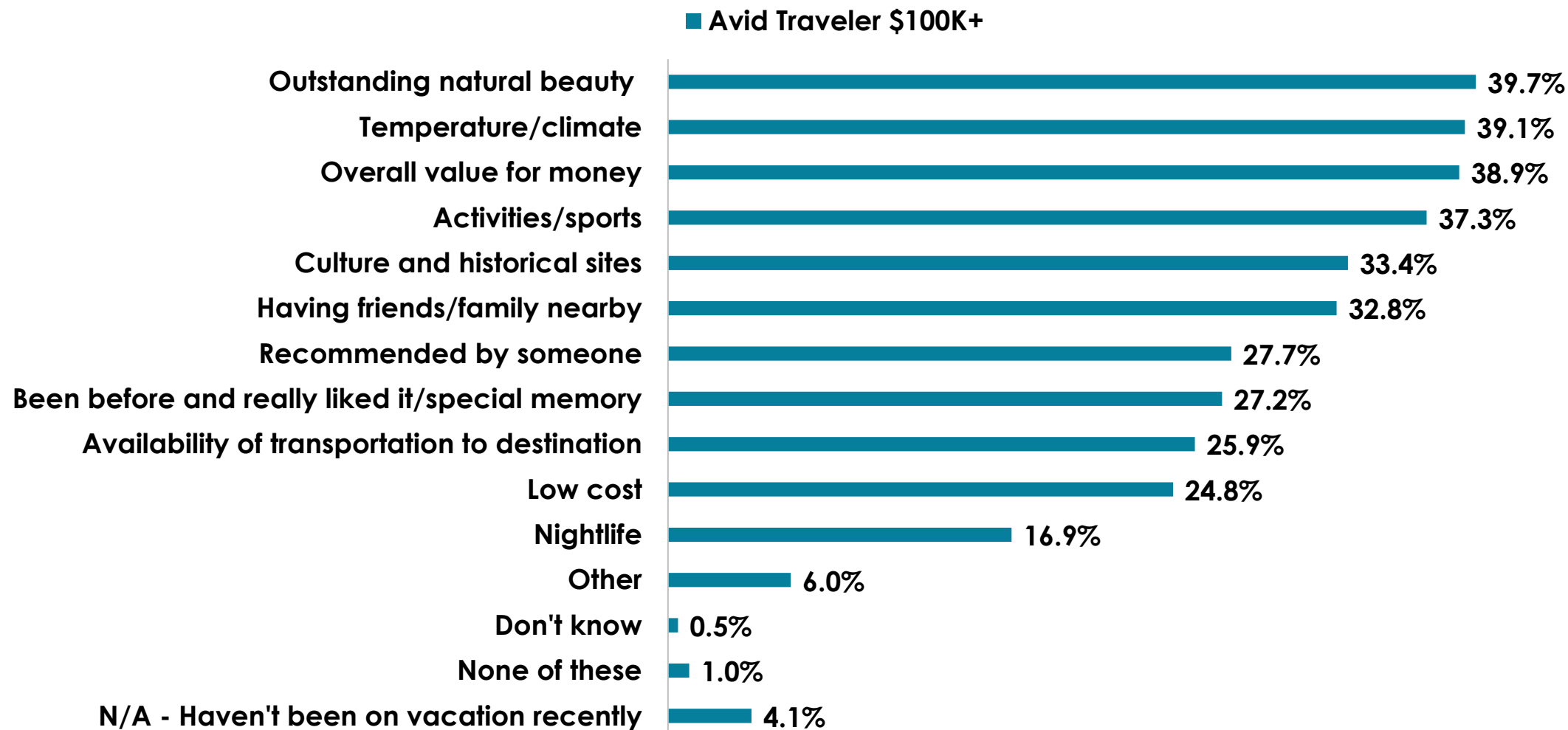
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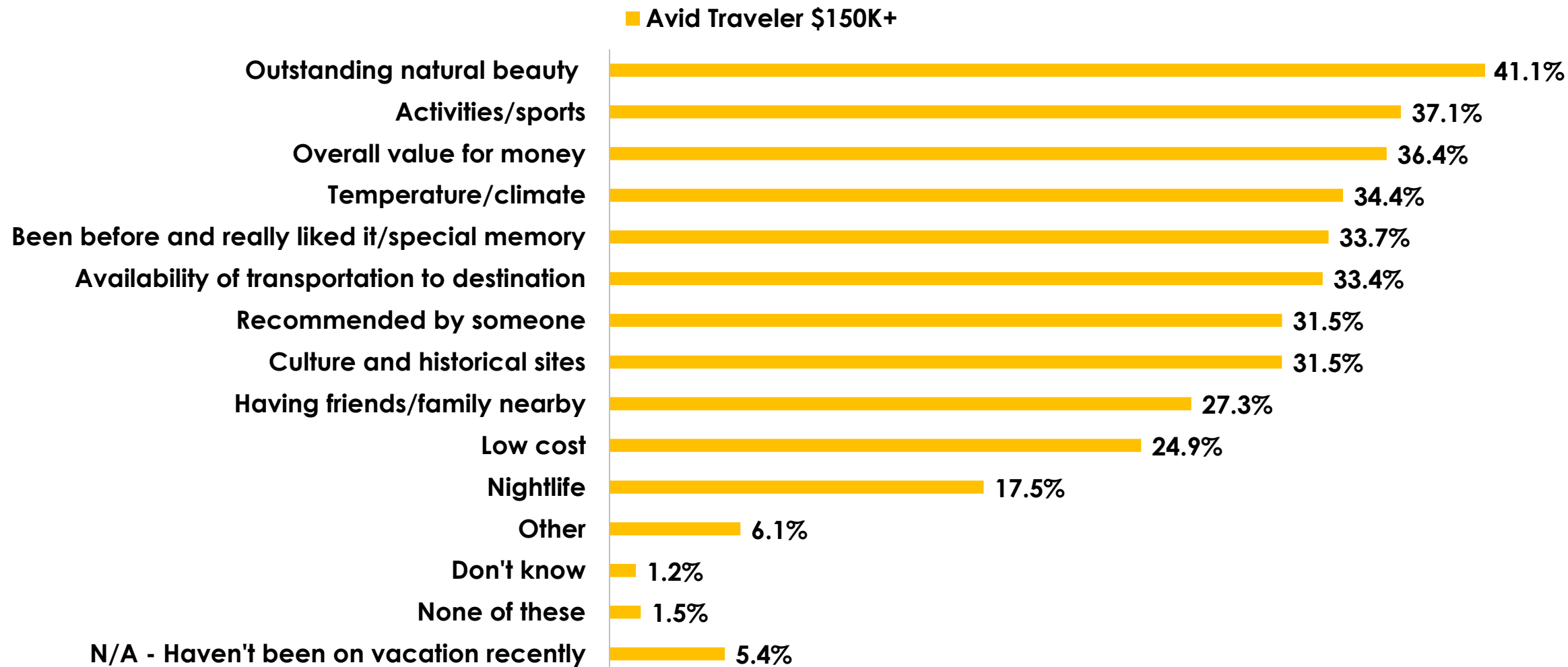
Reason for choosing most recent leisure destination

Reasons	Avid Traveler (\$100K, individual)	Avid Traveler (\$150K, 2+ household)	Long-Distance Air Traveler under 55	Nat Rep <input type="checkbox"/>
Outstanding natural beauty	40%	41%	34%	24%
Temperature/climate	39%	34%	39%	24%
Overall value for money	39%	36%	40%	29%
Activities/sports	37%	37%	22%	16%
Culture and historical sites	33%	32%	38%	19%
Having friends/family nearby	33%	27%	34%	24%
Recommended by someone	28%	32%	20%	14%
Been before and really liked it/special memory	27%	34%	24%	18%
Availability of transportation to destination	26%	33%	28%	14%
Low cost	25%	25%	33%	22%
Nightlife	17%	18%	13%	8%
Other	6%	6%	5%	6%
Don't know	0%	1%	2%	3%
None of these	1%	1%	0%	3%
N/A - Haven't been on vacation recently	4%	5%	8%	24%

Reason for choosing most recent leisure destination

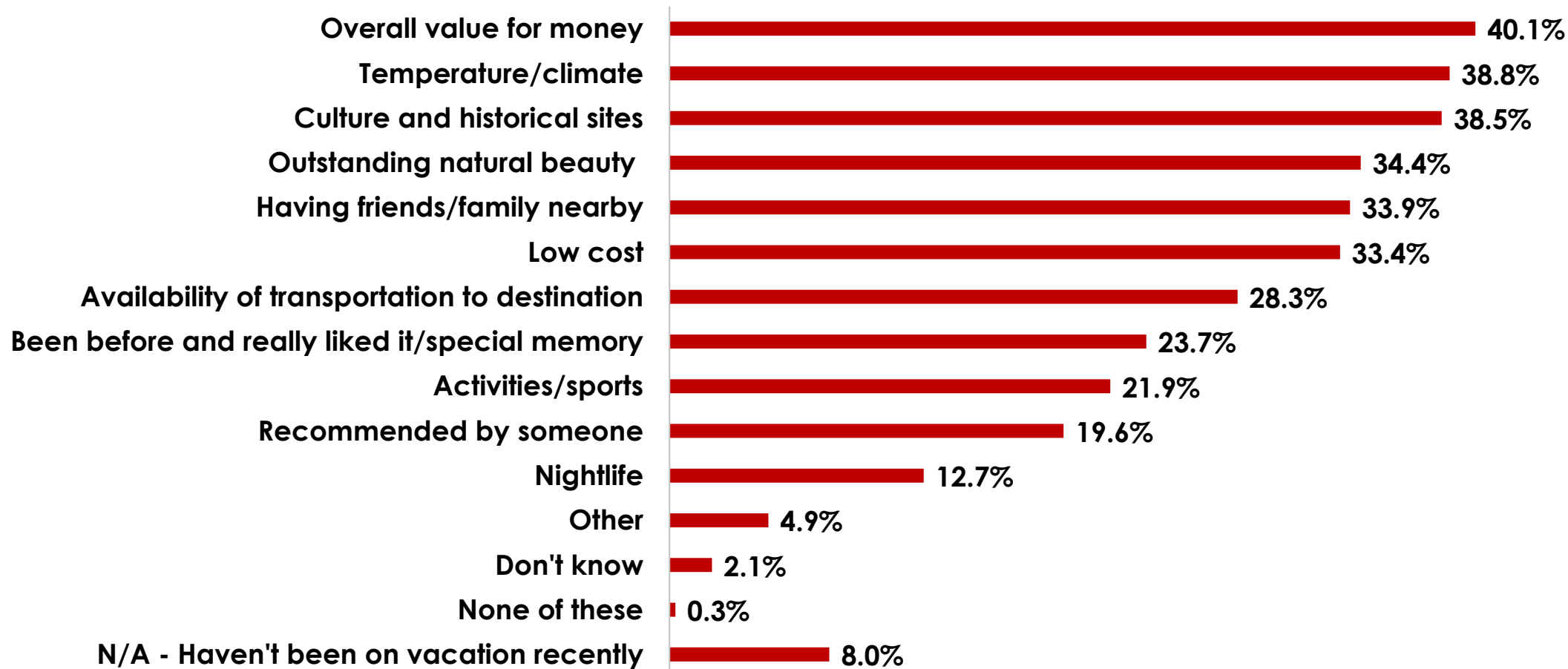


Reason for choosing most recent leisure destination

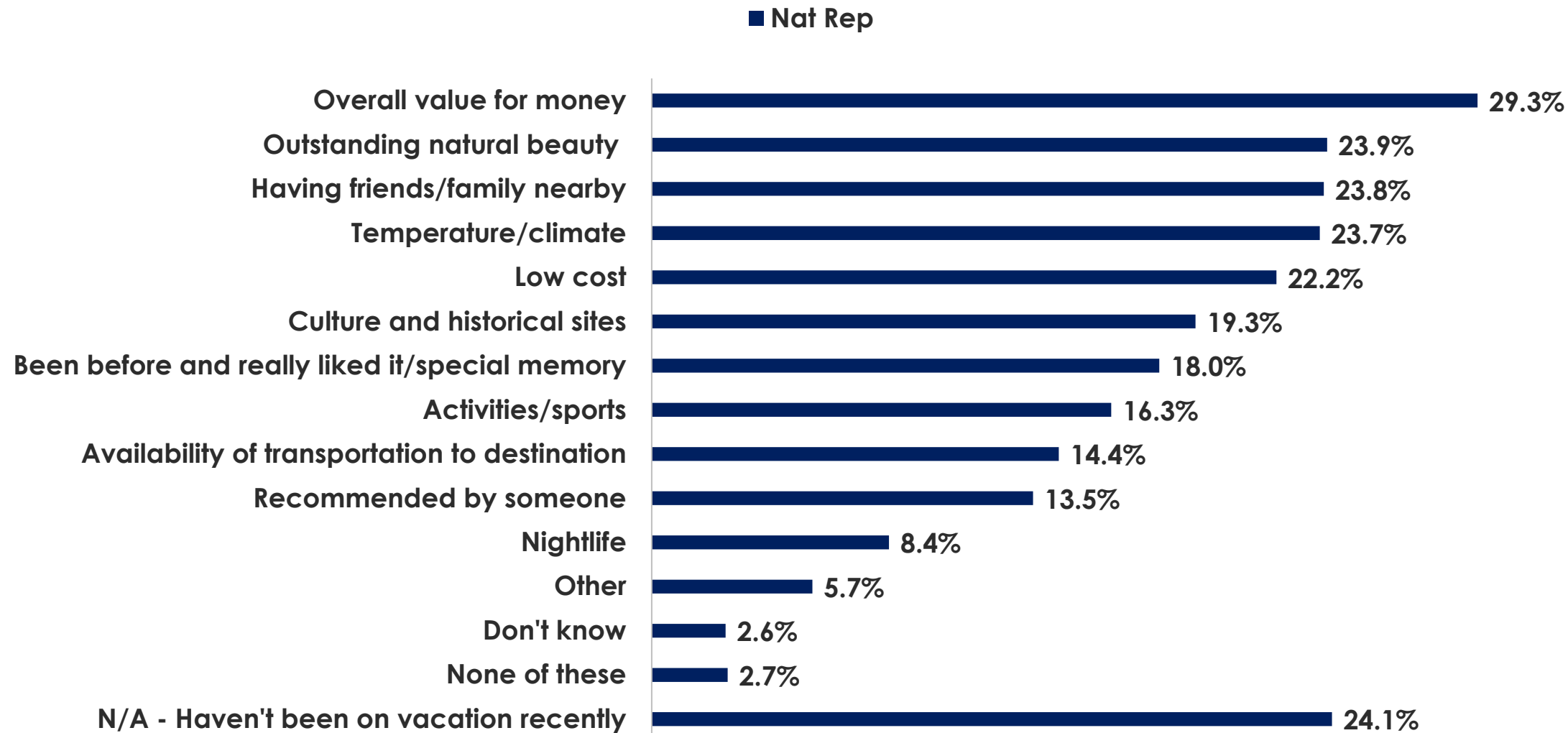


Reason for choosing most recent leisure destination

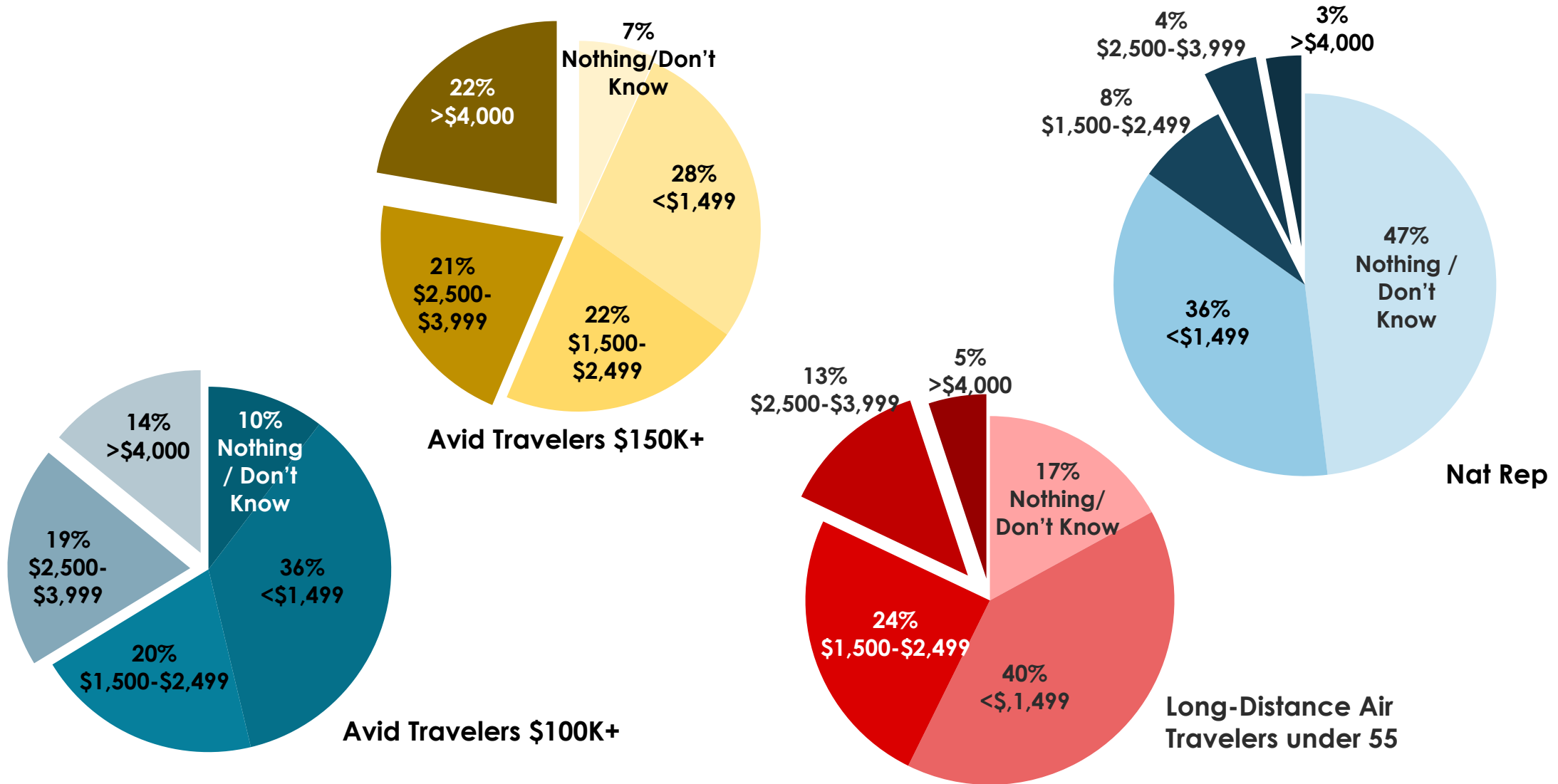
■ Long-Distance Air Traveler under 55



Reason for choosing most recent leisure destination



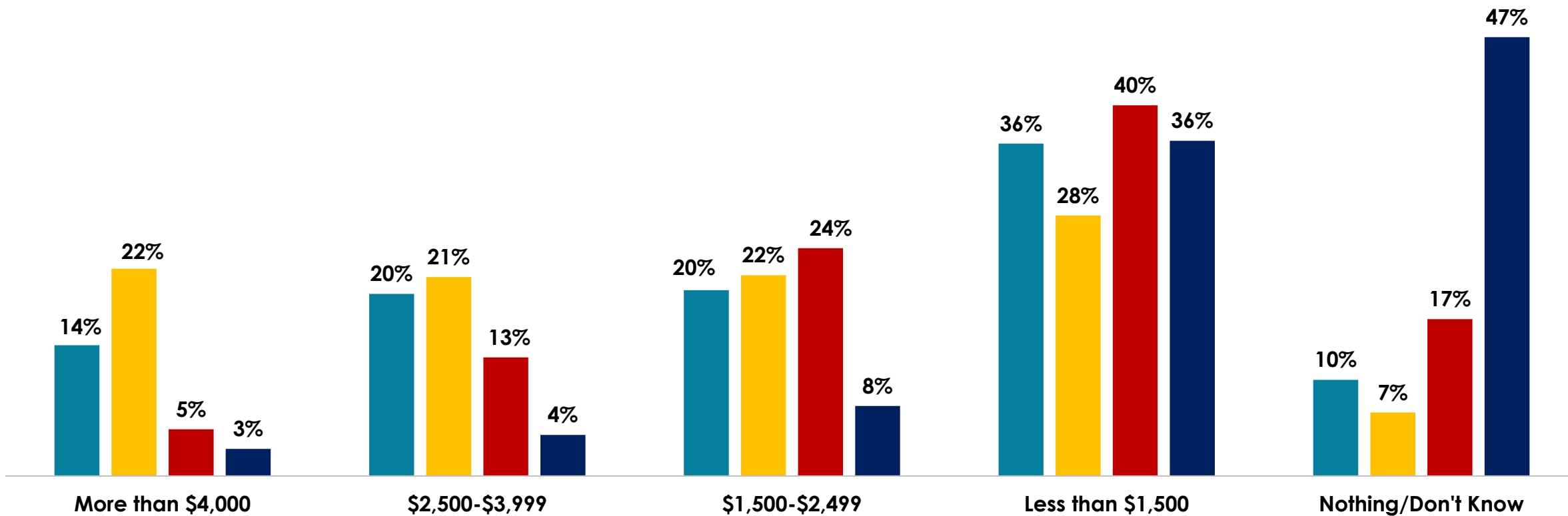
Most recent leisure trip - total spend



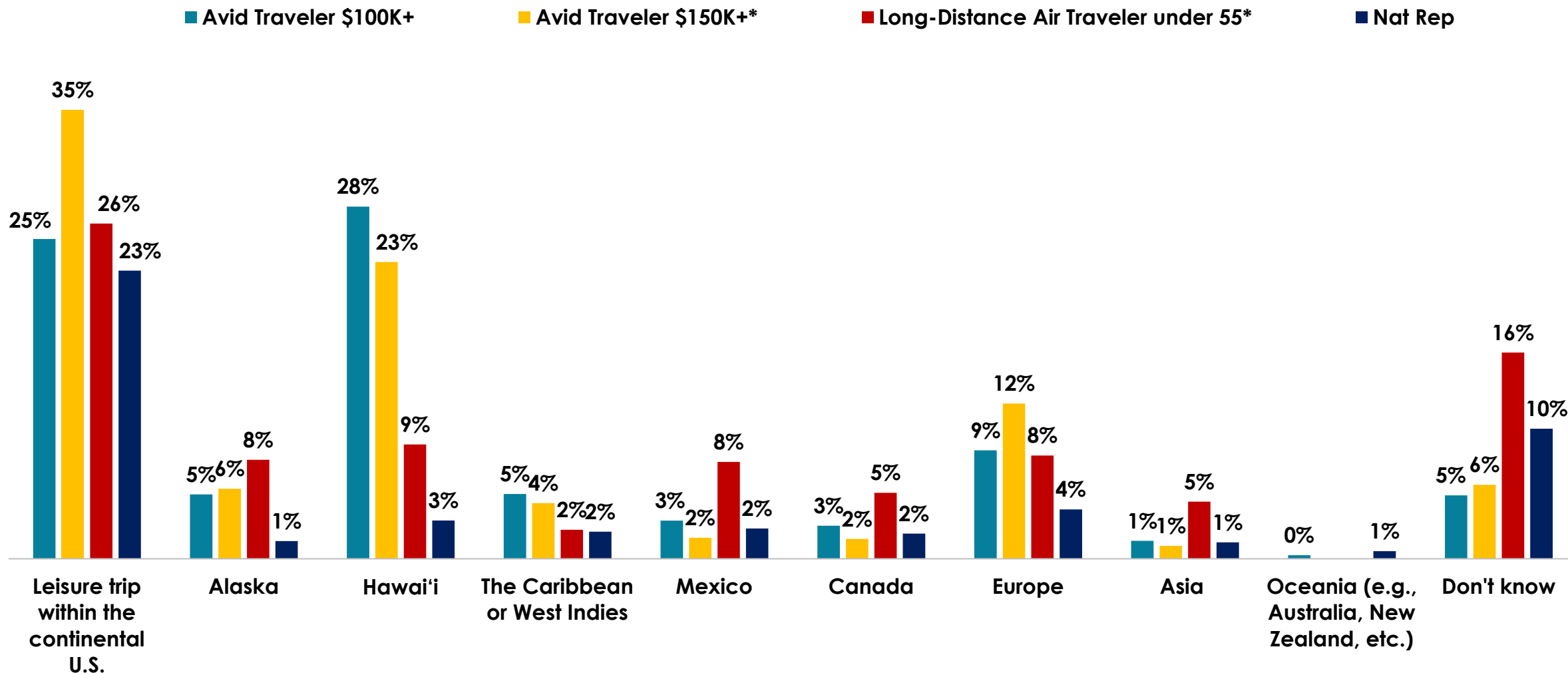
Based on Hawai'i Tourism Authority data, the average U.S. per person per trip spend for 2019 was \$1,693.32.

Most recent leisure trip - total spend

■ Avid Traveler \$100K+
 ■ Avid Traveler \$150K+
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Leisure trip - next destination



*YouGov sample size <100

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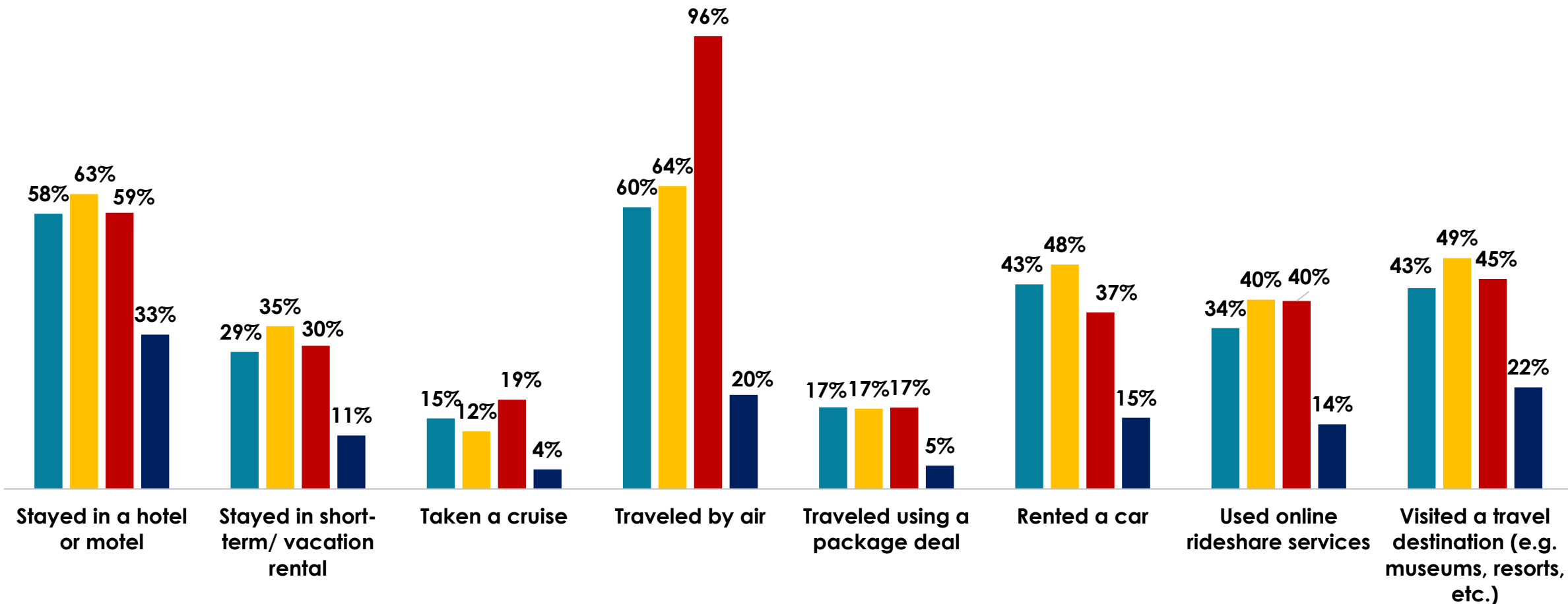
Leisure trip - activities in last 12 months

■ Avid Traveler \$100K+

■ Avid Traveler \$150K+

■ Long-Distance Air Traveler under 55

■ Nat Rep



Travel Mindset

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



Travel Activities

■ Avid Traveler \$100K+
 ■ Avid Traveler \$150K+
 ■ Long-Distance Air Traveler under 55
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Booking & Spending Attitudes

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

