

COVID-19 Impact on U.S. Avid Travelers

An HVCB analysis of YouGov data provided by HTA as of August 8, 2021

Reported on August 18, 2021

YouGov[®]

HAWAII TOURISM[™]
AUTHORITY

 **HAWAII**
VISITORS & CONVENTION BUREAU[™]



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)

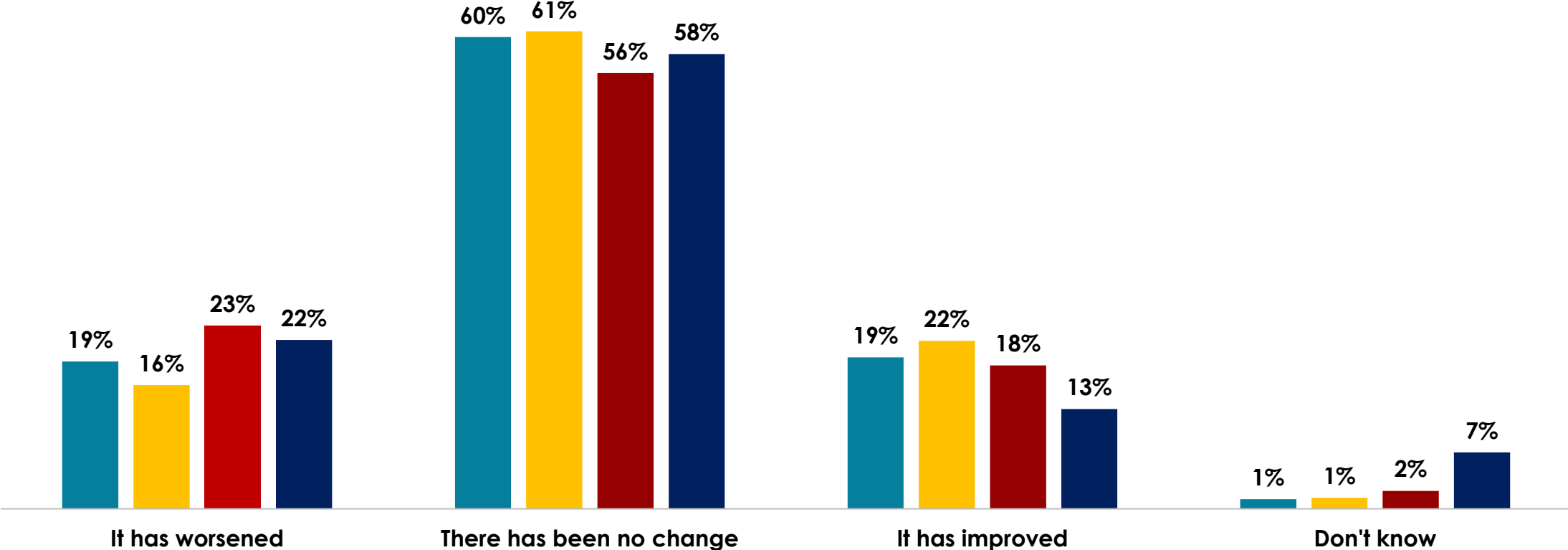
- Representative of U.S. adults in terms of age, gender, social class and education



Travelers' Pandemic Outlook

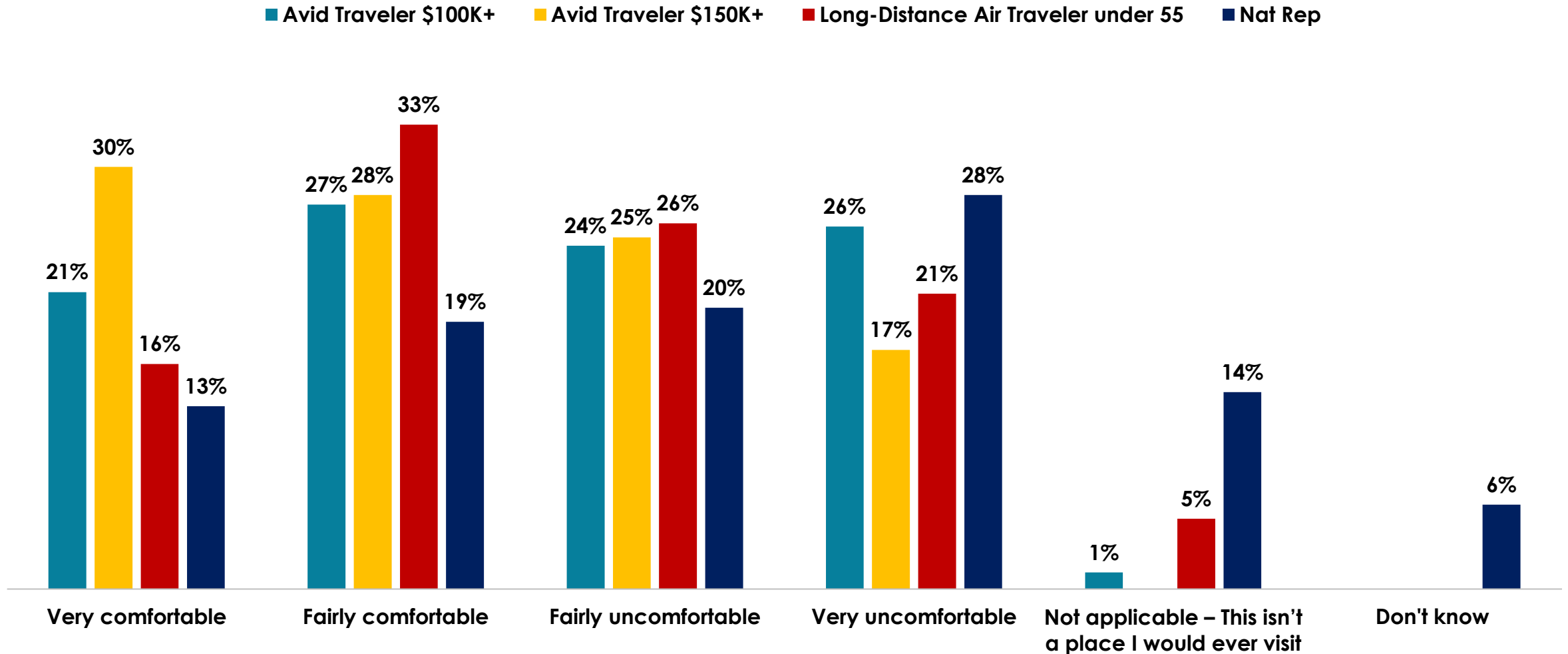
How has your household economic situation changed in the past month?

■ 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 August 8, 2021

Level of comfort visiting an airport right now

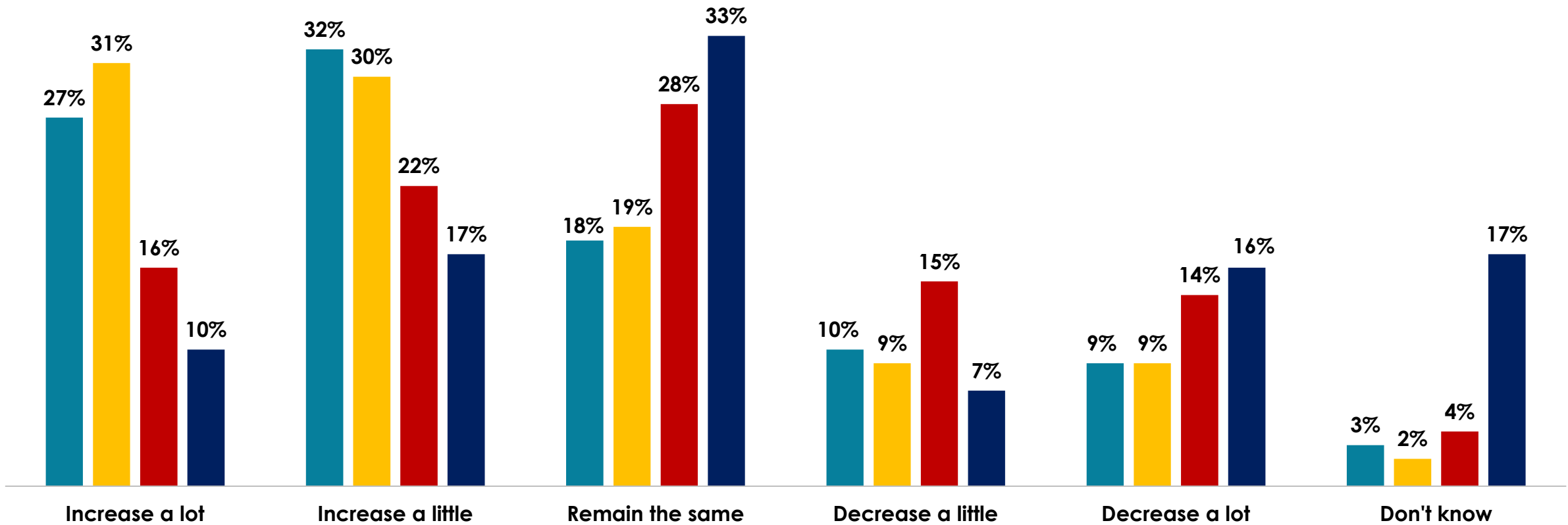




Future Travel Plans

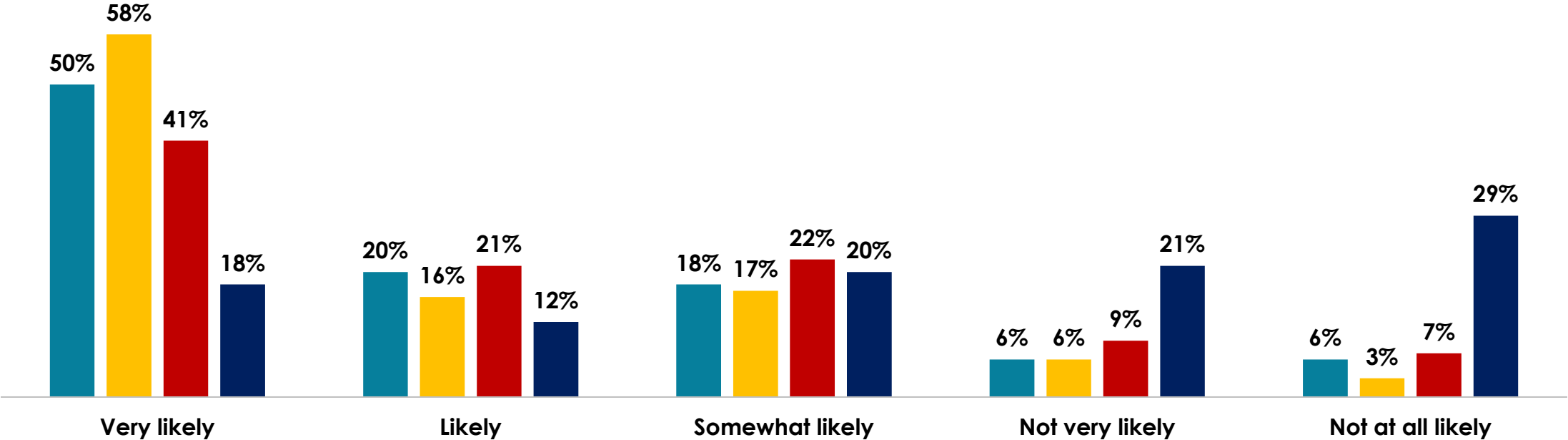
Future Travel – Expected change to air travel in the next 12 months

■ 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

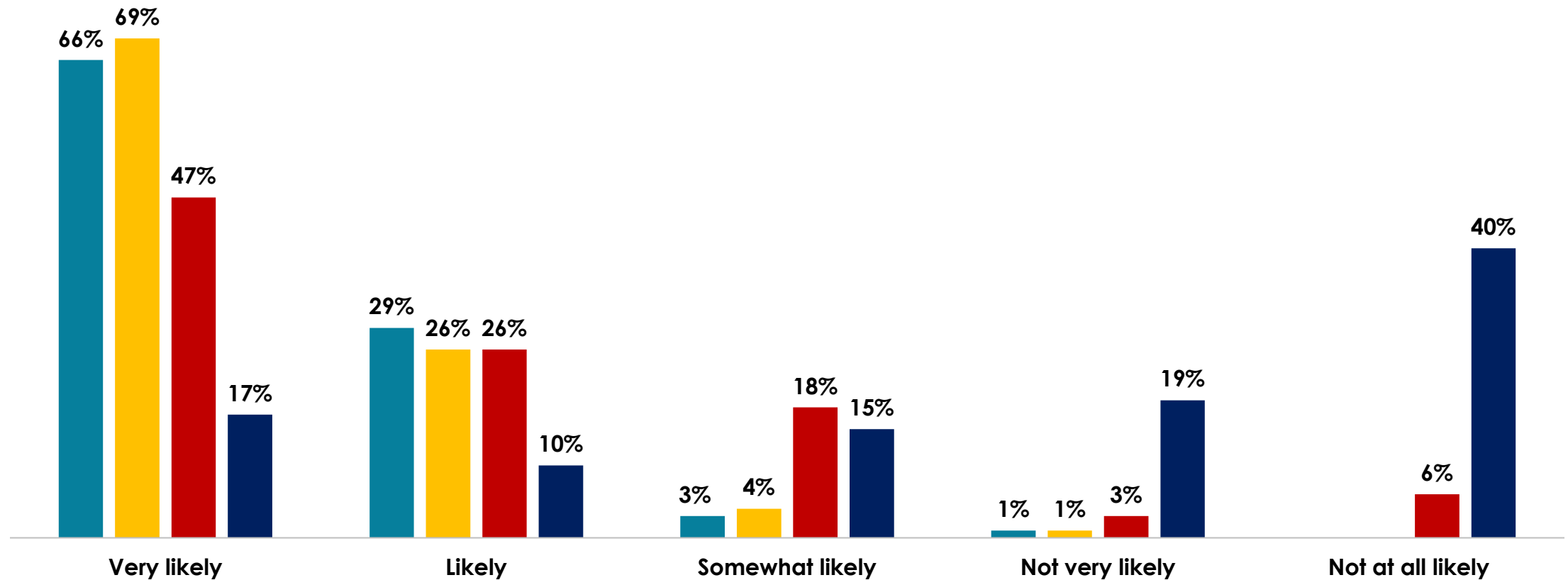
■ Avid Traveler \$100K+ ■ Avid Traveler \$150K+ ■ Long-Distance Air Traveler under 55 ■ Nat Rep



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

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



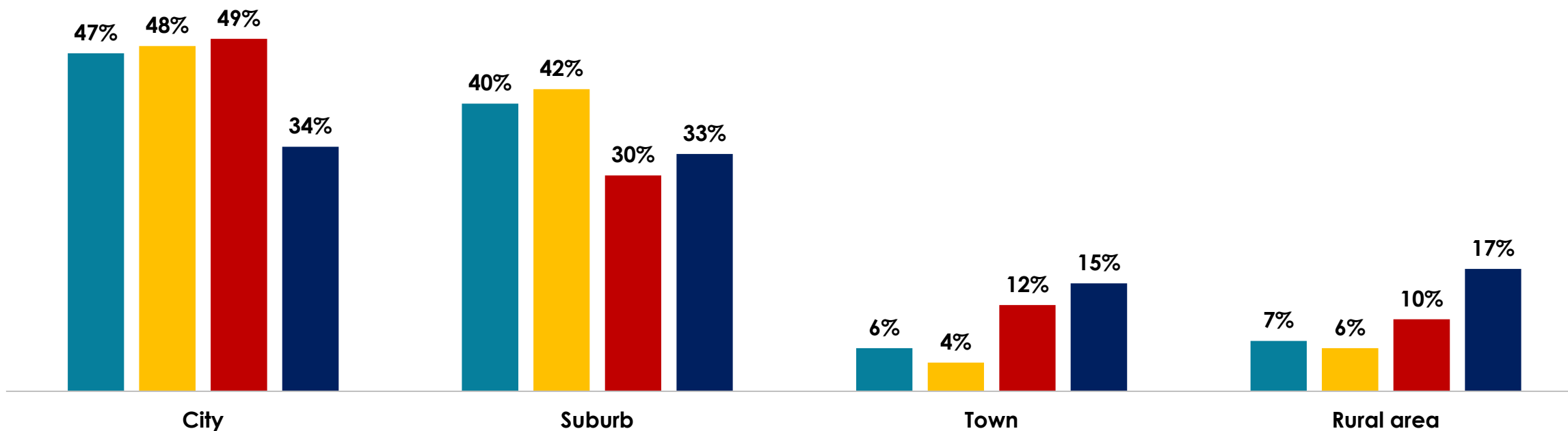


Traveler Profiles

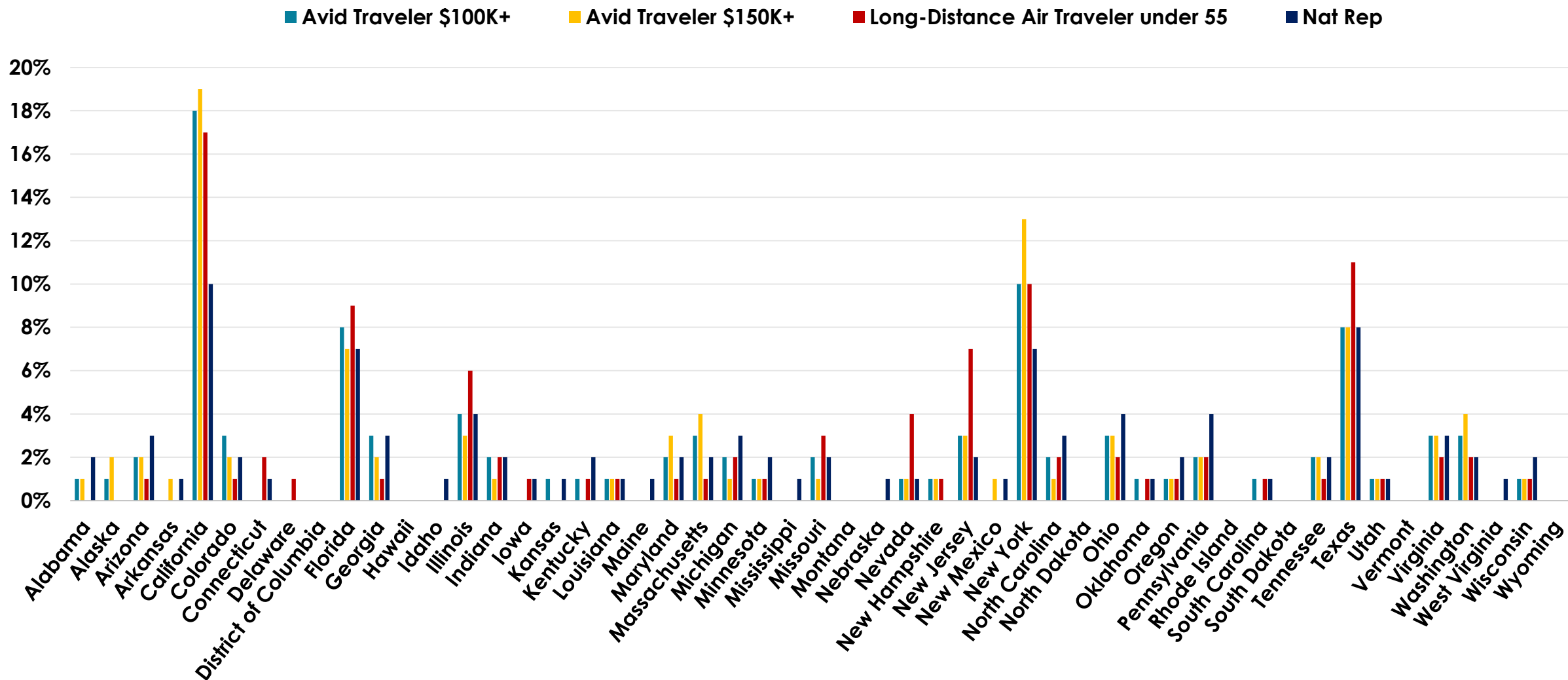
Avid Travelers vs. Long-Distance Air Travelers vs. Nat. Rep.

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	17.8%
New York	9.9%
Florida	8.1%
Texas	8.1%
Illinois	4.2%
Colorado	3.3%
New Jersey	3.2%
Washington	3.1%
Georgia	2.9%
Ohio	2.6%

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

California	19.3%
New York	12.6%
Texas	7.7%
Florida	7.0%
Washington	3.7%
Massachusetts	3.7%
Maryland	3.5%
Virginia	3.4%
Illinois	3.4%
Ohio	3.2%

Long-Distance Air Traveler under 55

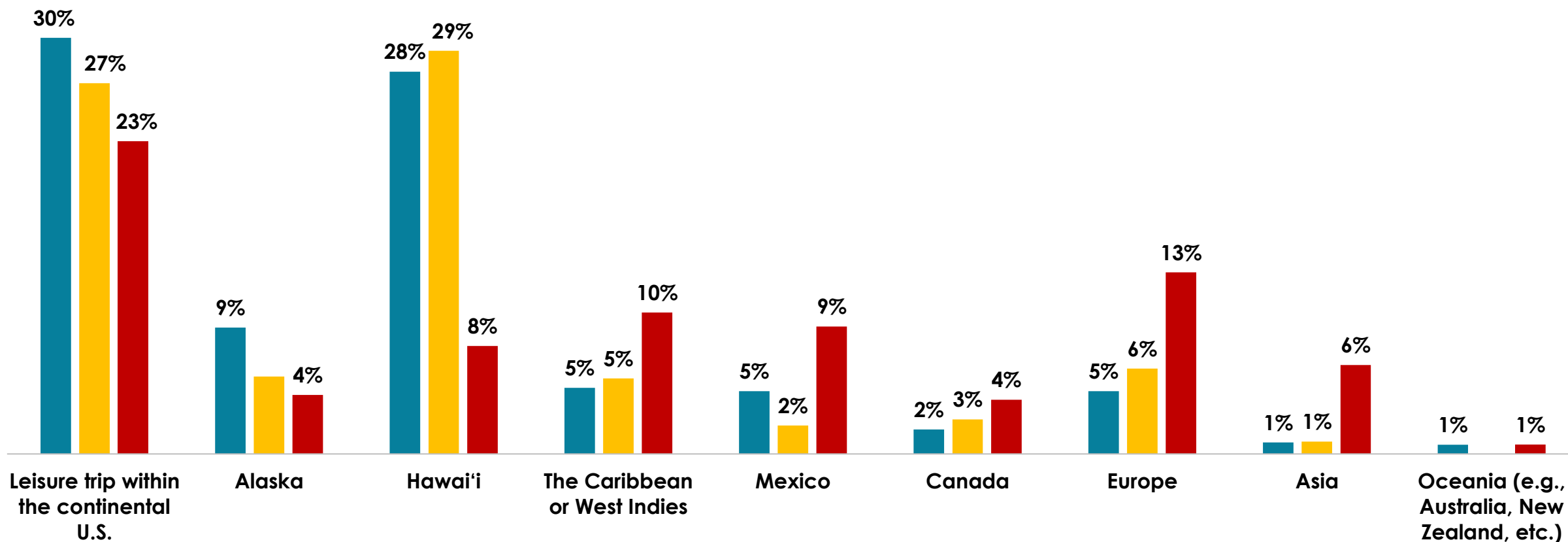
California	17.1%
Texas	11.3%
New York	10.1%
Florida	8.5%
New Jersey	6.8%
Illinois	5.9%
Nevada	3.6%
Missouri	2.7%
Washington	2.3%
Indiana	2.3%

Nat Rep

California	10.3%
Texas	8.3%
Florida	7.0%
New York	6.6%
Pennsylvania	4.4%
Ohio	3.7%
Illinois	3.6%
Georgia	3.1%
North Carolina	2.8%
Michigan	2.8%

Leisure trip – most recent destination

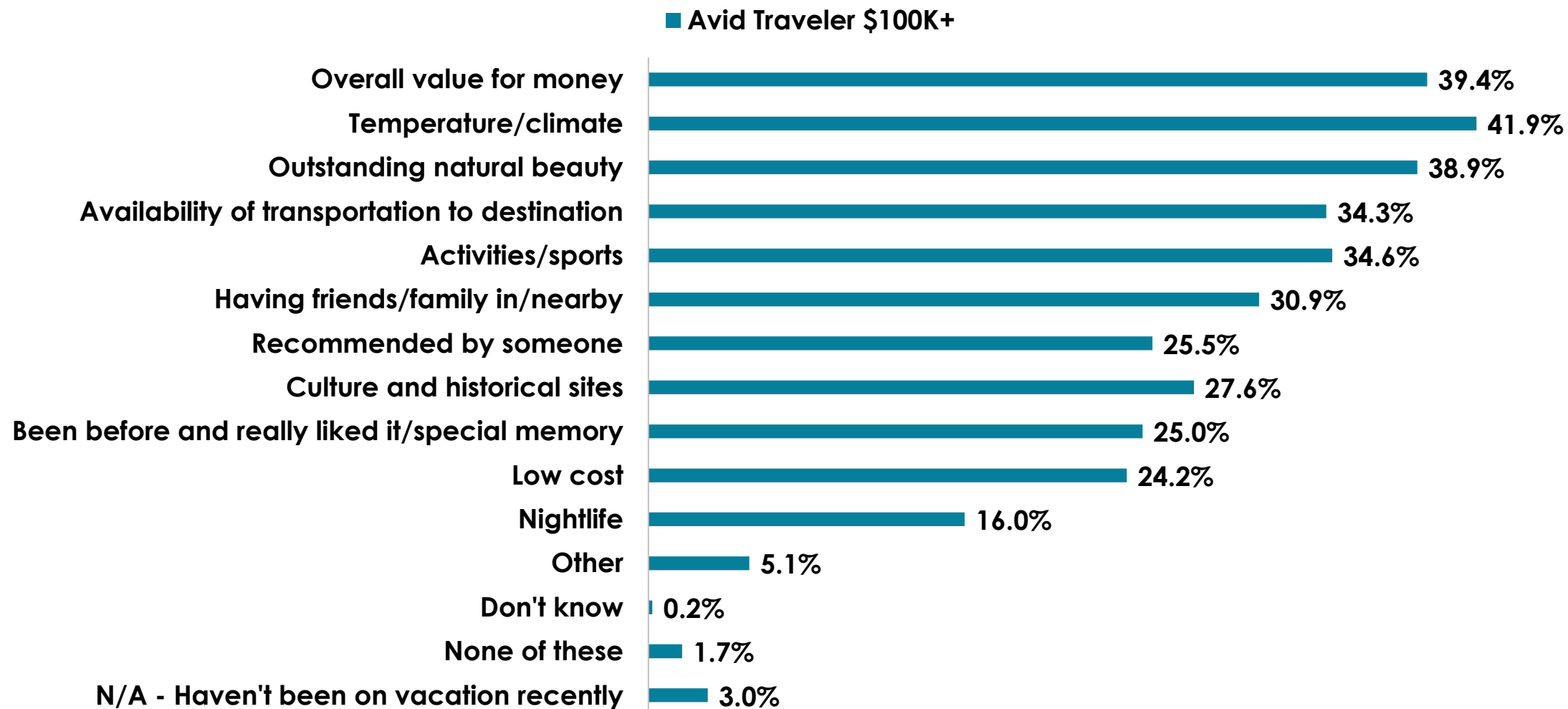
■ Avid Traveler \$100K+
 ■ Avid Traveler \$150K+
 ■ Long-Distance Air Traveler under 55



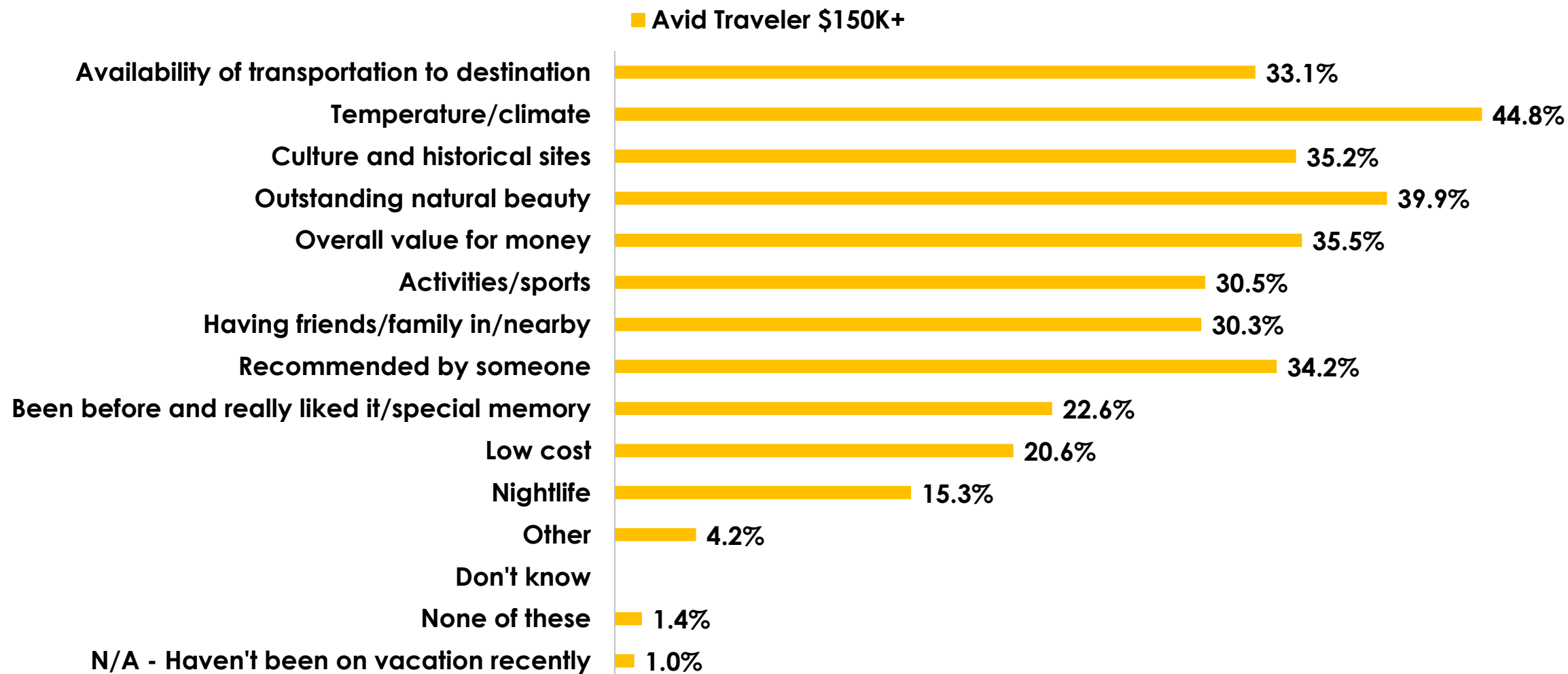
Reason for choosing most recent leisure destination

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	39.4%	33.1%	25.8%	30.5%
The temperature/climate	41.9%	44.8%	41.3%	24.1%
Outstanding natural beauty	38.9%	35.2%	21.8%	24.1%
Availability of transportation to destination	34.3%	39.9%	22.8%	14.7%
Activities/sports	34.6%	35.5%	26.7%	16.3%
Having friends/family in/nearby	30.9%	30.5%	32.5%	23.5%
Recommended by someone	25.5%	30.3%	18.4%	13.2%
Culture and historical sites	27.6%	34.2%	27.7%	18.6%
Been before and really liked it/special memory	25.0%	22.6%	17.5%	18.9%
Low cost	24.2%	20.6%	24.8%	23.3%
Nightlife	16.0%	15.3%	24.4%	8.6%
Other	5.1%	4.2%	0.7%	5.7%
Don't know	0.2%	0.0%	0.4%	2.4%
None of these	1.7%	1.4%	0.7%	2.3%
N/A - Haven't been on vacation recently	3.0%	1.0%	5.5%	23.7%

Reason for choosing most recent leisure destination

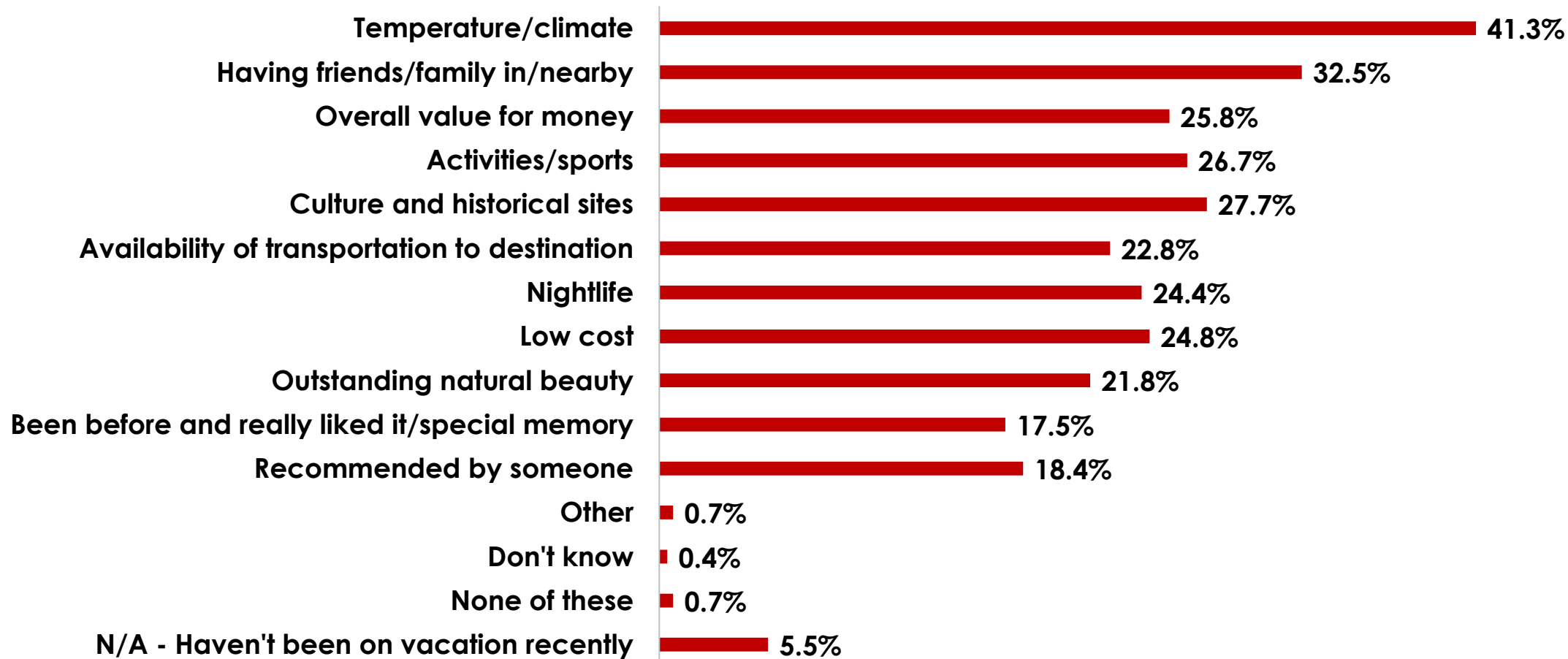


Reason for choosing most recent leisure destination

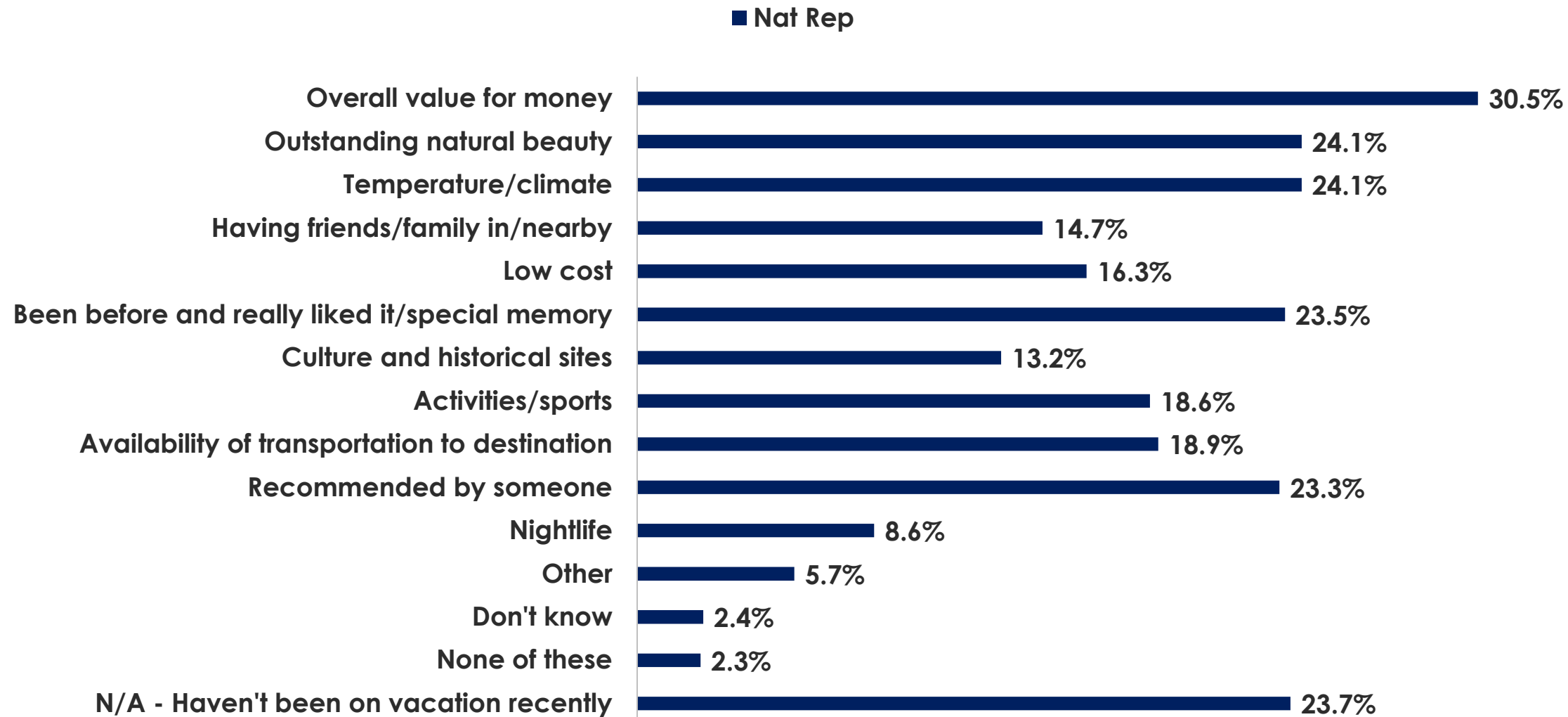


Reason for choosing most recent leisure destination

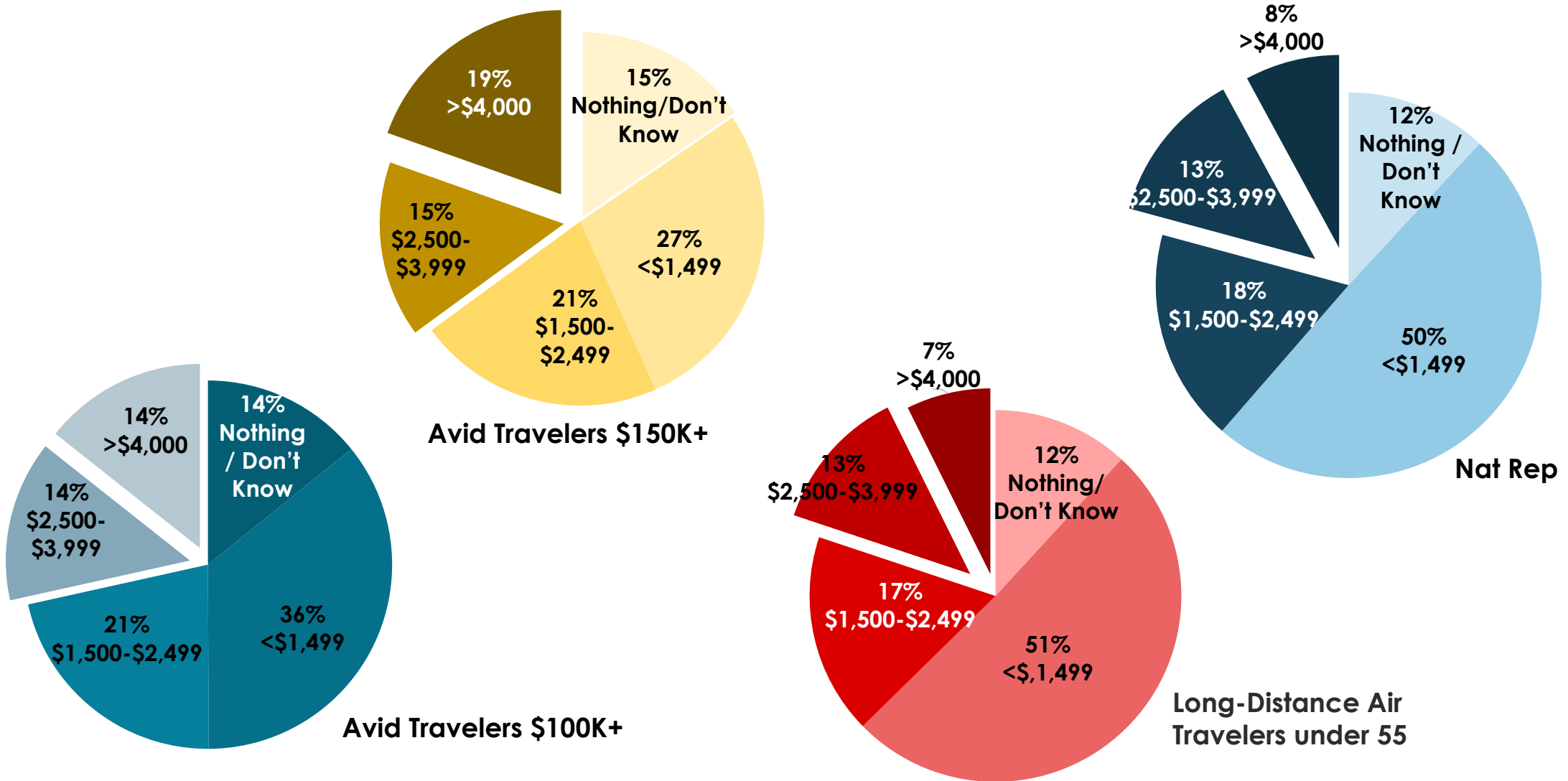
■ Long-Distance Air Traveler under 55



Reason for choosing most recent leisure destination



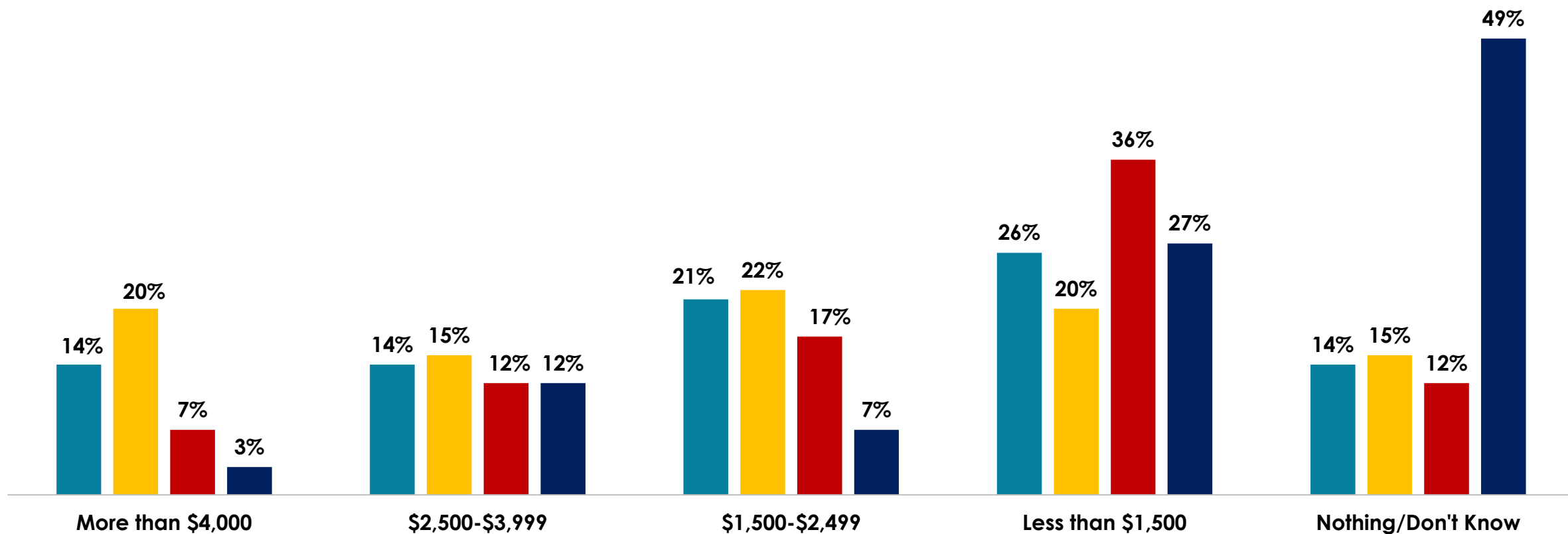
Most recent leisure trip - total spend



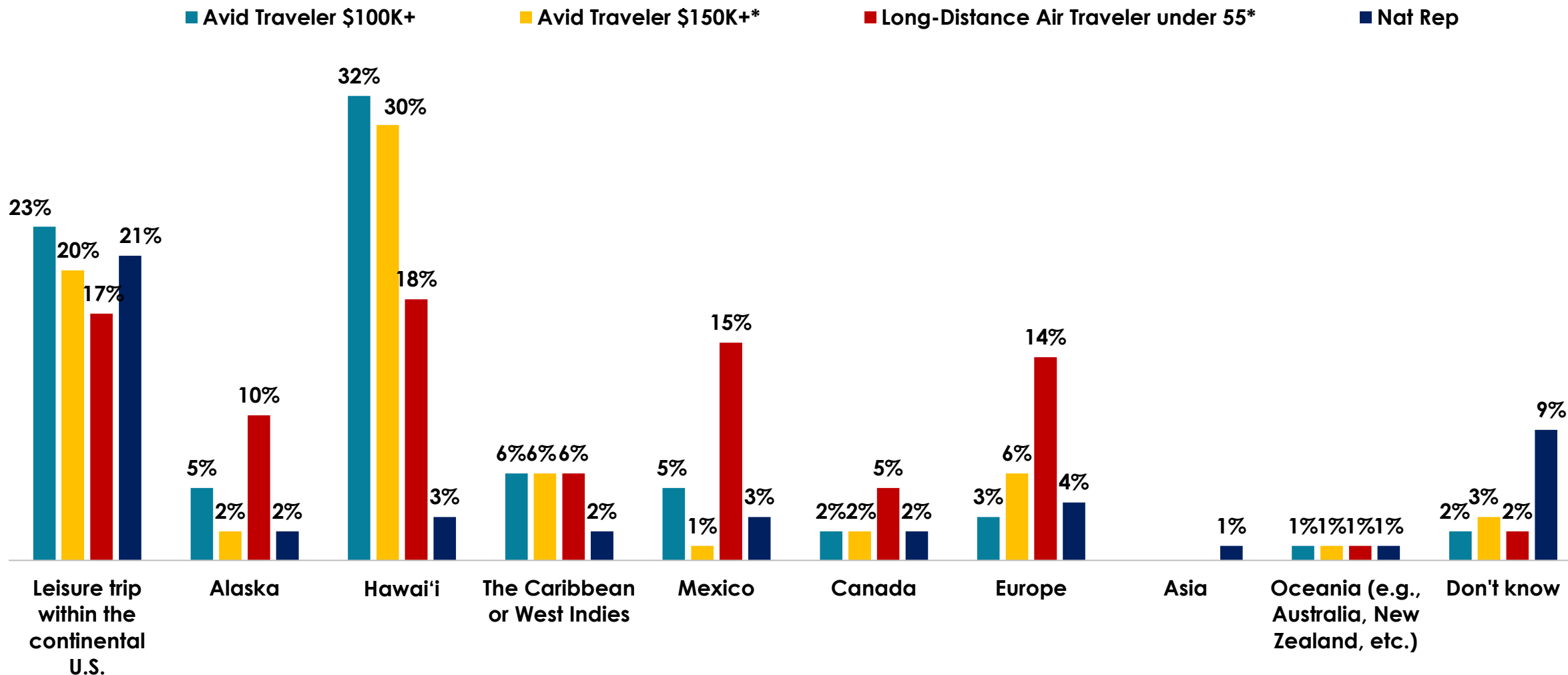
Based on Hawai'i Tourism Authority data, the average U.S. per person per trip spend for 2019 was \$1,693.32.

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

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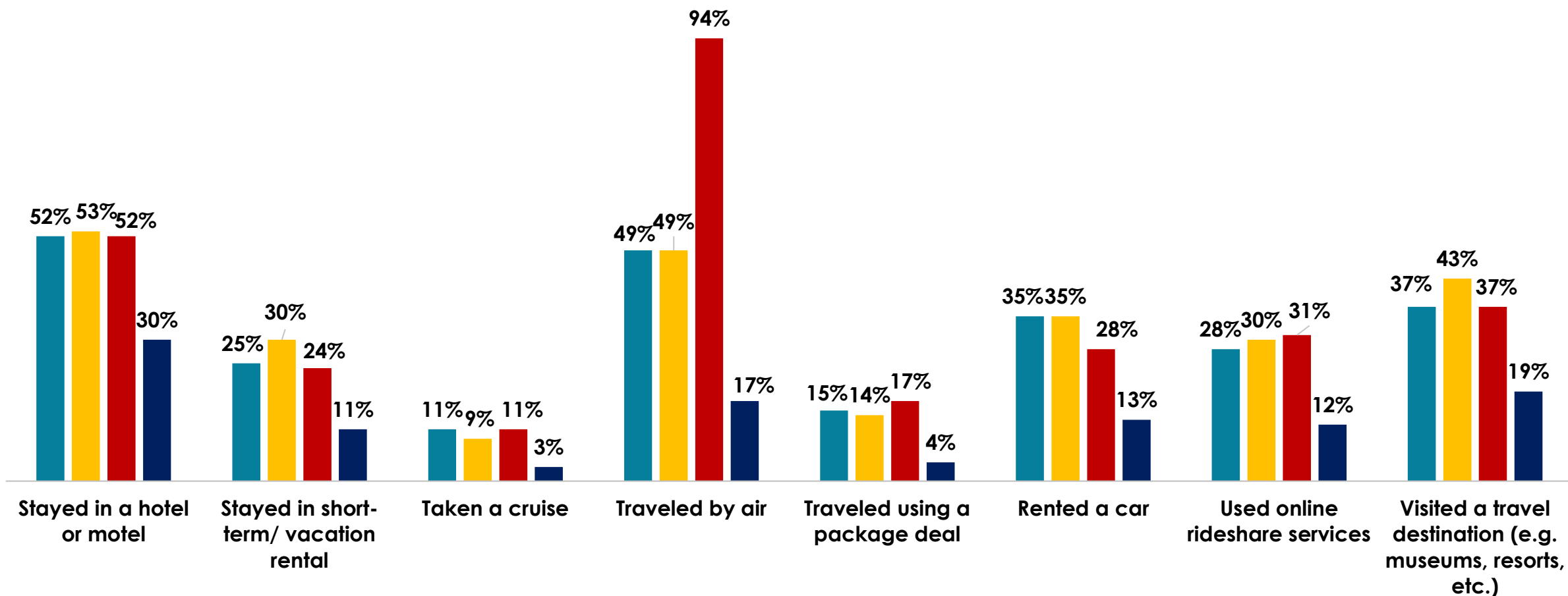
Leisure trip - activities in last 12 months

■ 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



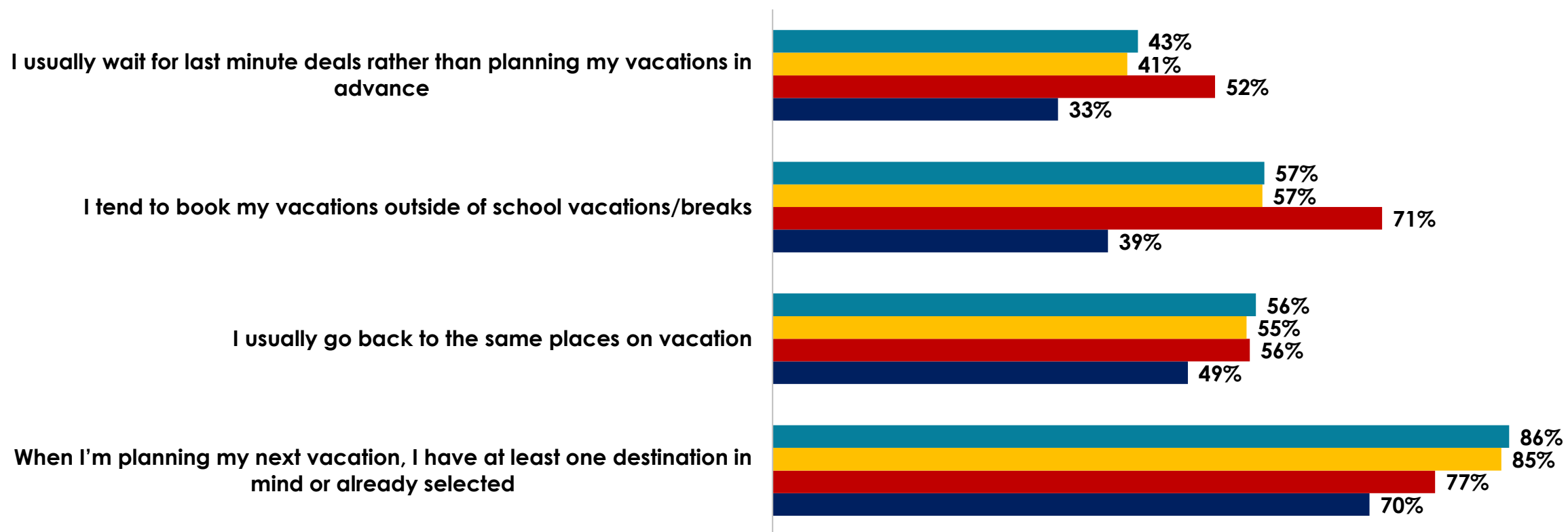
Travel Activities

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Booking & Spending Attitudes

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

