

COVID-19 Impact on U.S. Avid Travelers

An HVCB analysis of YouGov data provided by HTA as of November 7, 2021

Reported on November 18, 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)

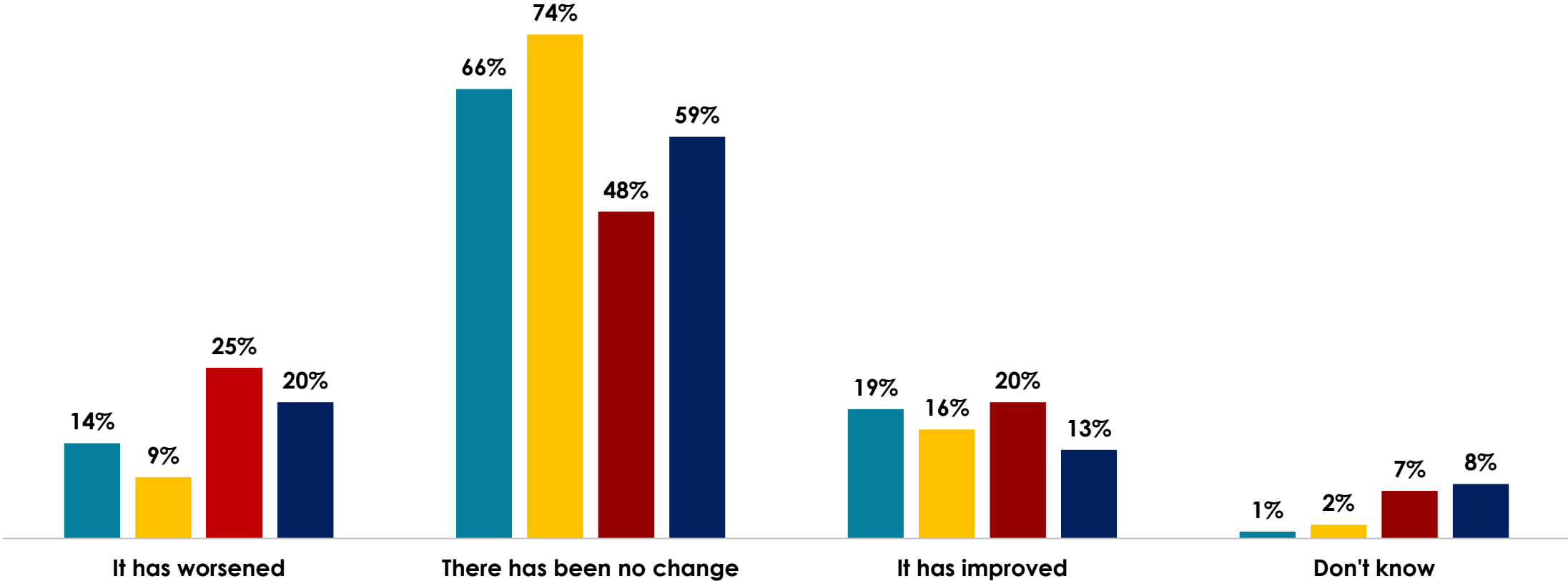
- Representative of U.S. adults in terms of age, gender, social class and education



Travelers' Pandemic Outlook

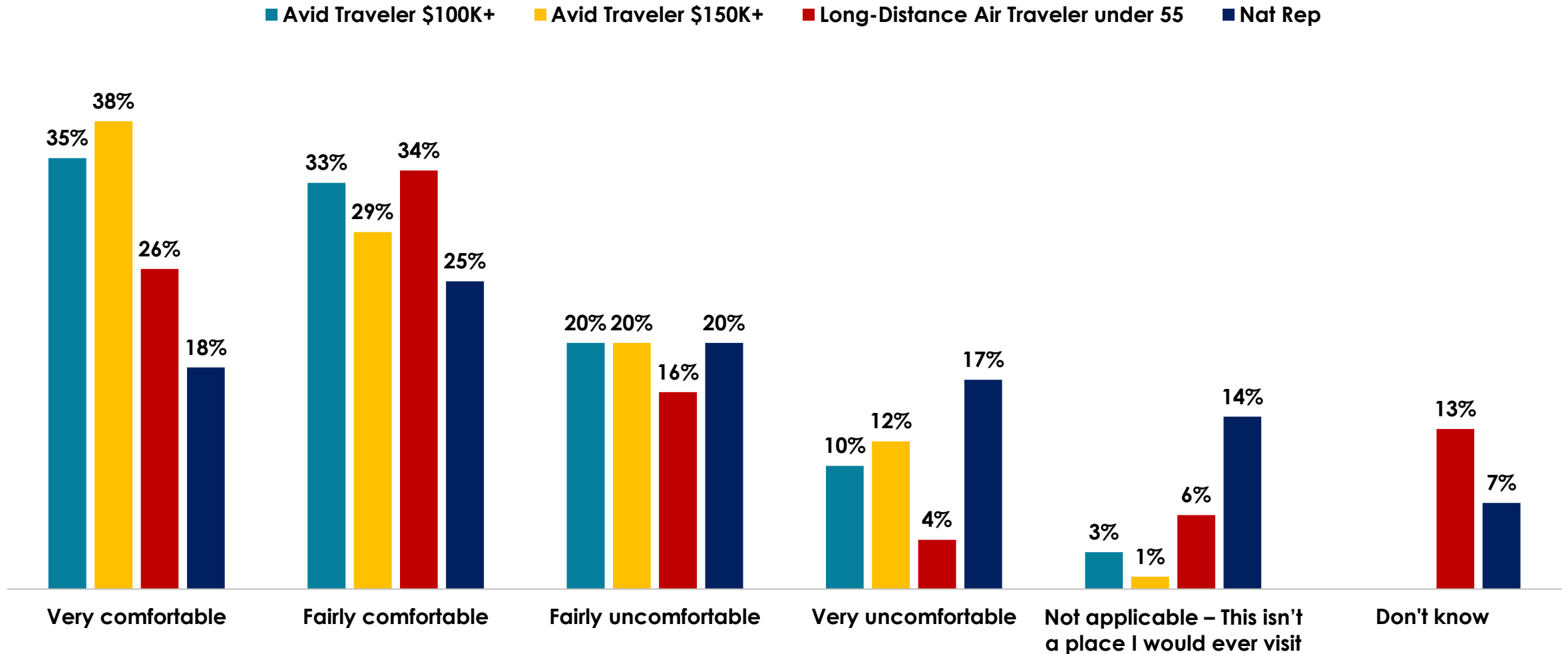
How has your household economic situation changed in the past month?

■ 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 November 7, 2021

Level of comfort visiting an airport right now

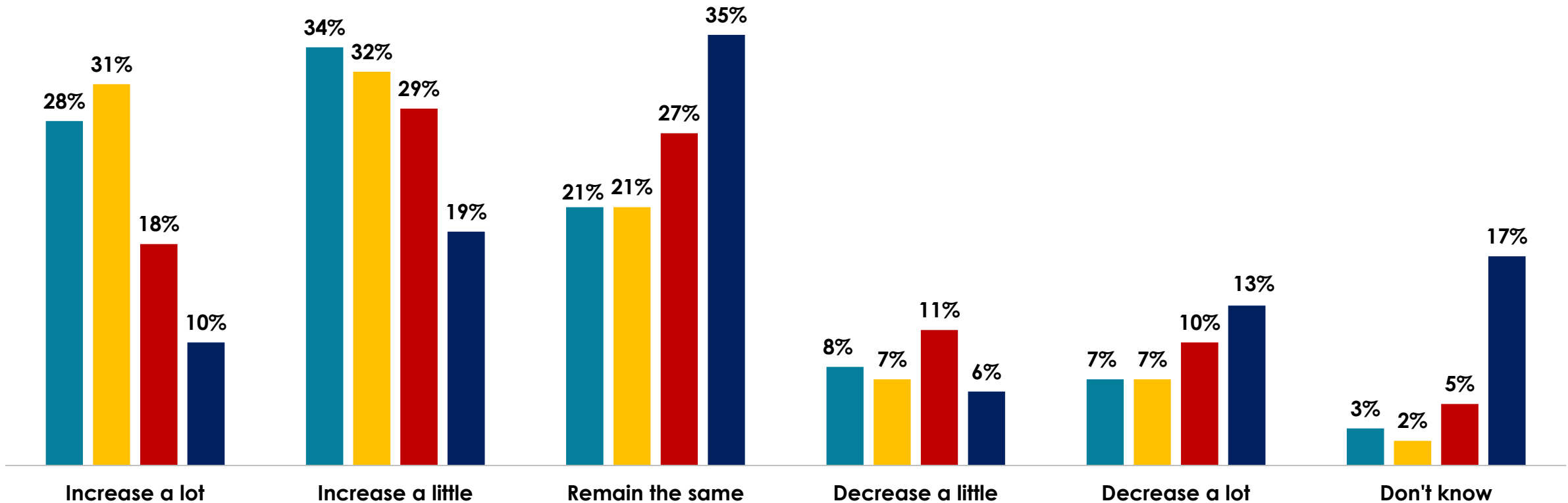




Future Travel Plans

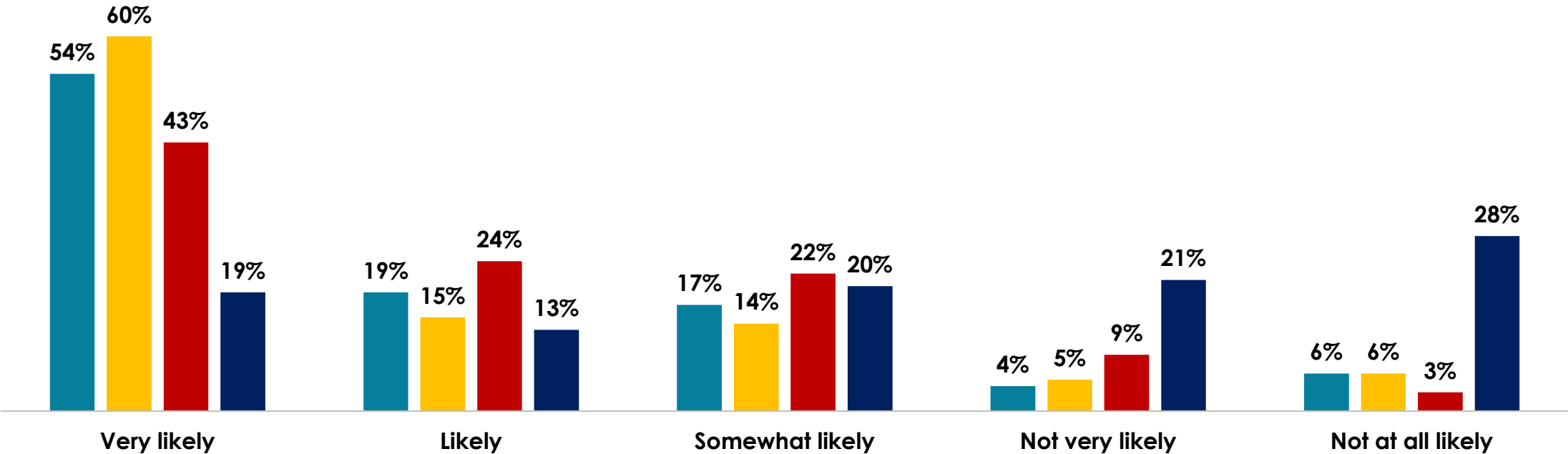
Future Travel – Expected change to air travel in the next 12 months

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



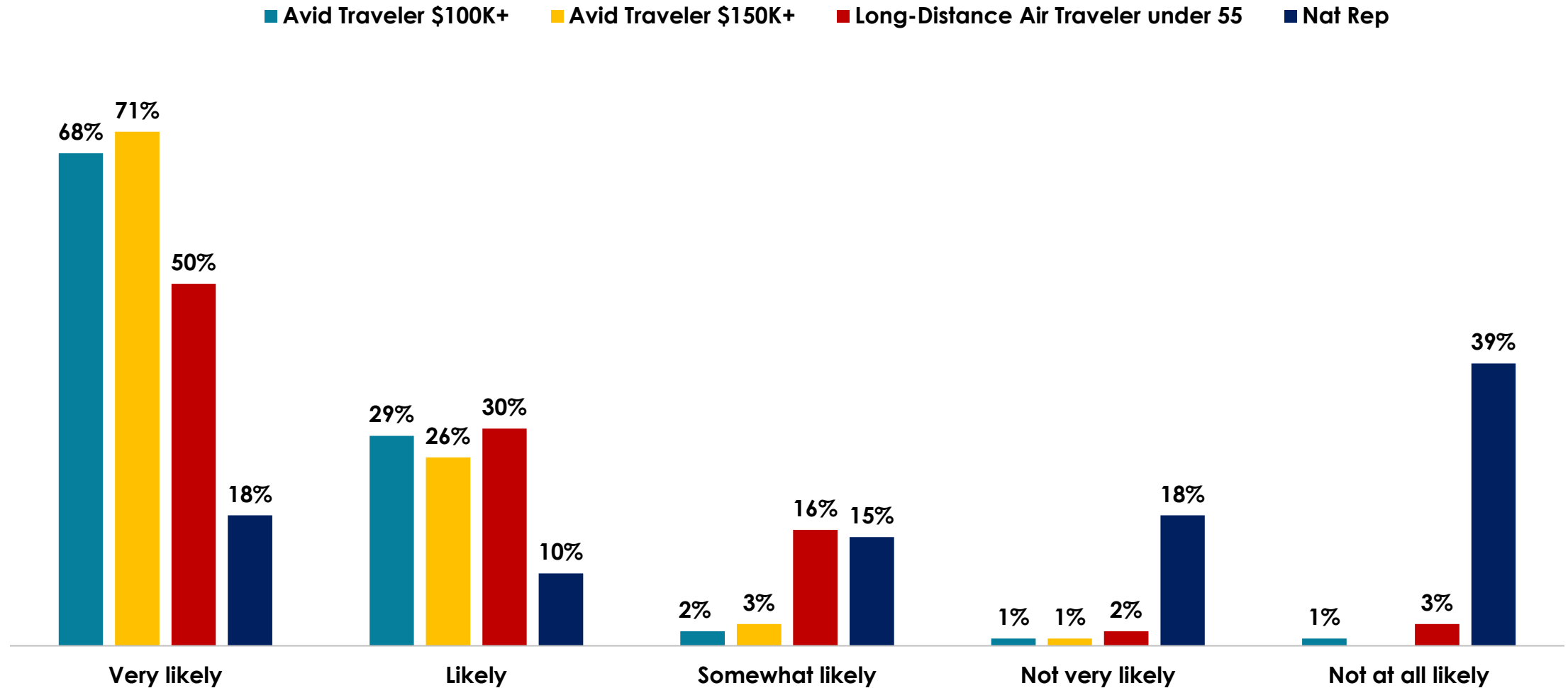
Future Travel – Likelihood of purchasing travel or leisure services in the next 12 months

■ 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



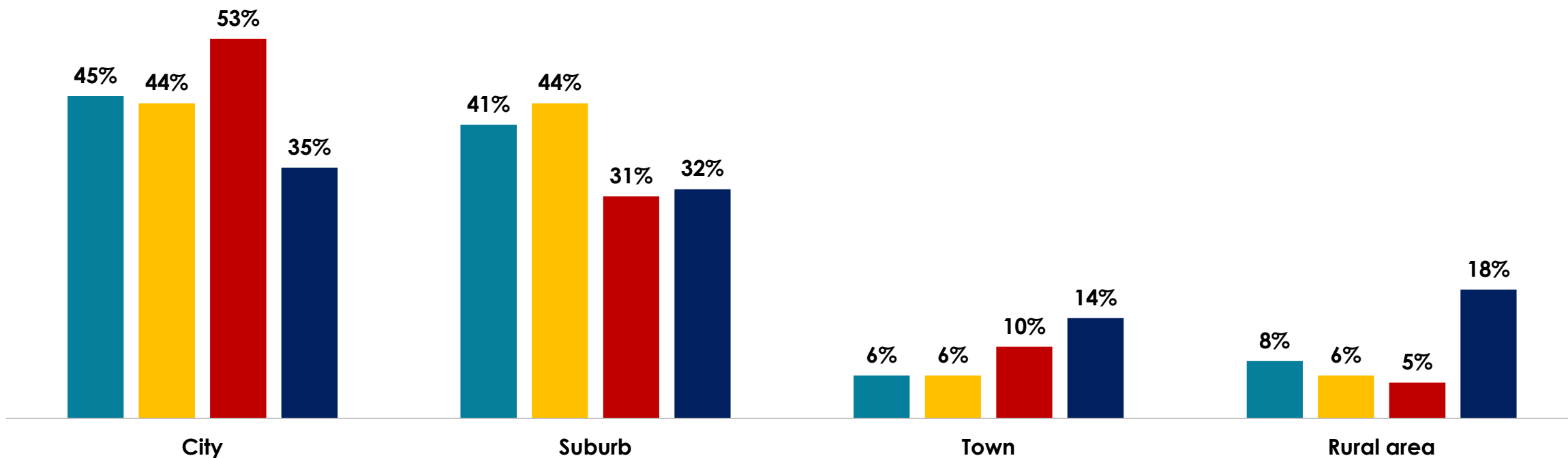


Traveler Profiles

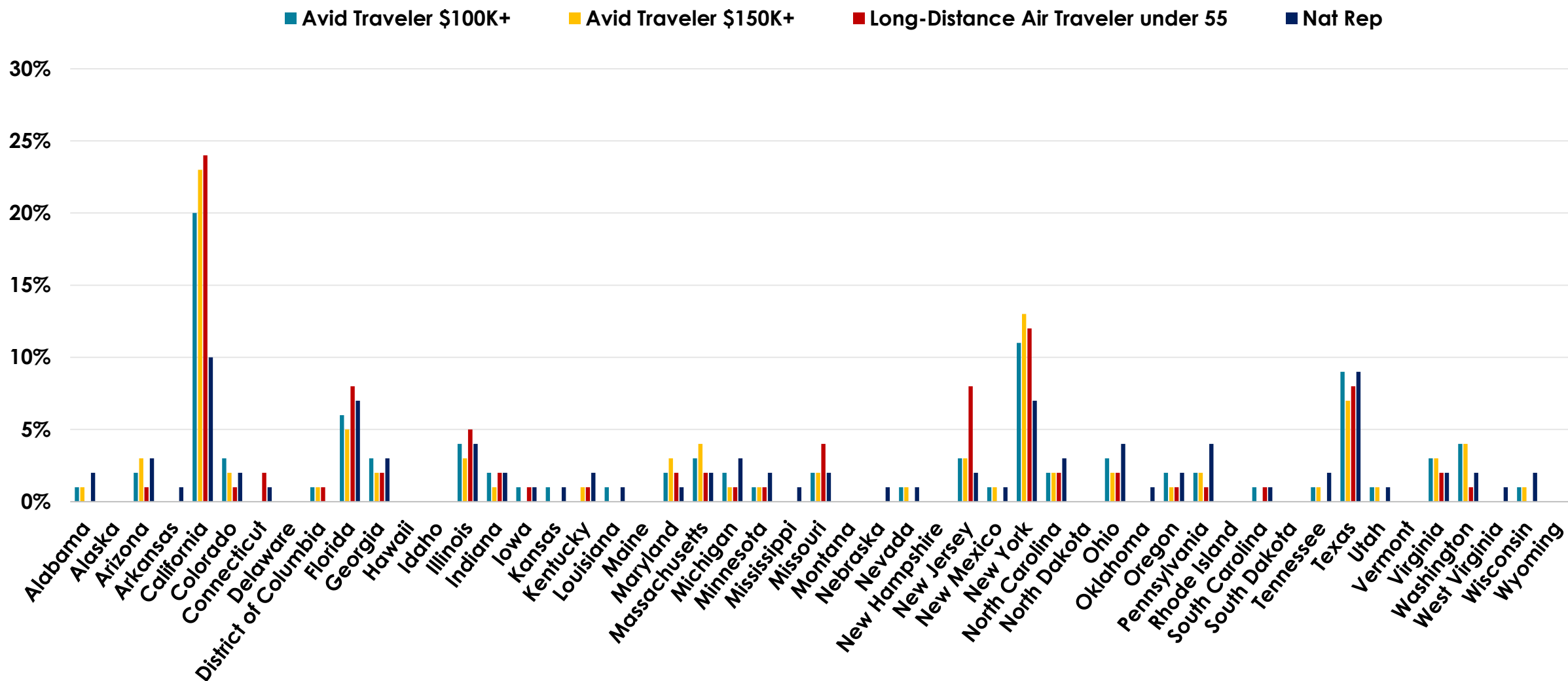
Avid Travelers vs. Long-Distance Air Travelers vs. Nat. Rep.

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 | 20.4% |
| New York | 10.6% |
| Texas | 9.0% |
| Florida | 6.2% |
| Washington | 3.8% |
| Illinois | 3.6% |
| New Jersey | 3.1% |
| Virginia | 3.0% |
| Massachusetts | 2.9% |
| Ohio | 2.6% |

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

| | |
|---------------|-------|
| California | 22.7% |
| New York | 13.4% |
| Texas | 7.1% |
| Florida | 5.0% |
| Massachusetts | 4.4% |
| Washington | 4.2% |
| New Jersey | 3.5% |
| Virginia | 3.4% |
| Maryland | 3.4% |
| Arizona | 3.0% |

Long-Distance Air Traveler under 55

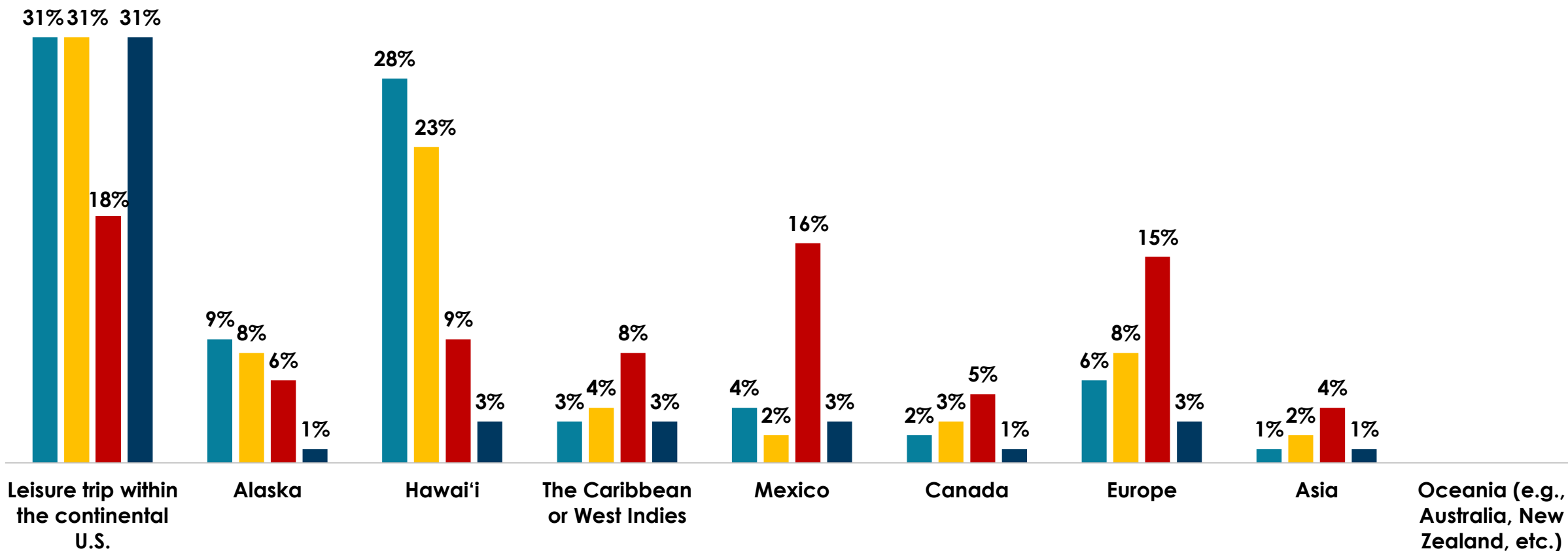
| | |
|---------------|-------|
| California | 23.6% |
| New York | 12.0% |
| New Jersey | 7.7% |
| Texas | 7.7% |
| Florida | 7.6% |
| Illinois | 4.7% |
| Missouri | 3.8% |
| Massachusetts | 2.4% |
| Virginia | 2.4% |
| Ohio | 2.3% |

Nat Rep

| | |
|----------------|-------|
| California | 10.3% |
| Texas | 8.8% |
| Florida | 7.1% |
| New York | 6.5% |
| Pennsylvania | 4.3% |
| Ohio | 3.7% |
| Illinois | 3.6% |
| Georgia | 3.2% |
| North Carolina | 2.8% |
| Michigan | 2.8% |

Leisure trip – most recent destination

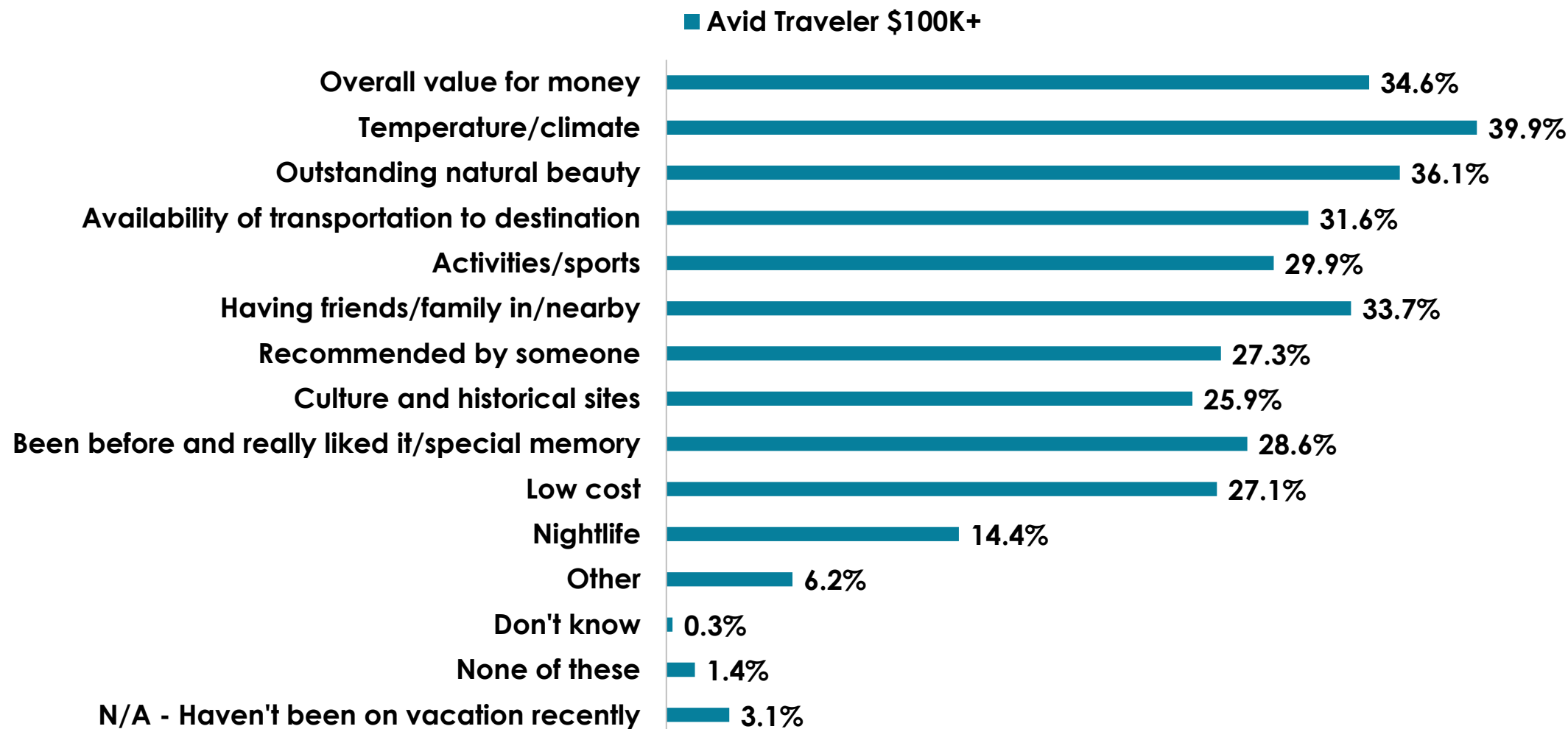
■ Avid Traveler \$100K+
 ■ Avid Traveler \$150K+
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 ■ Nat Rep



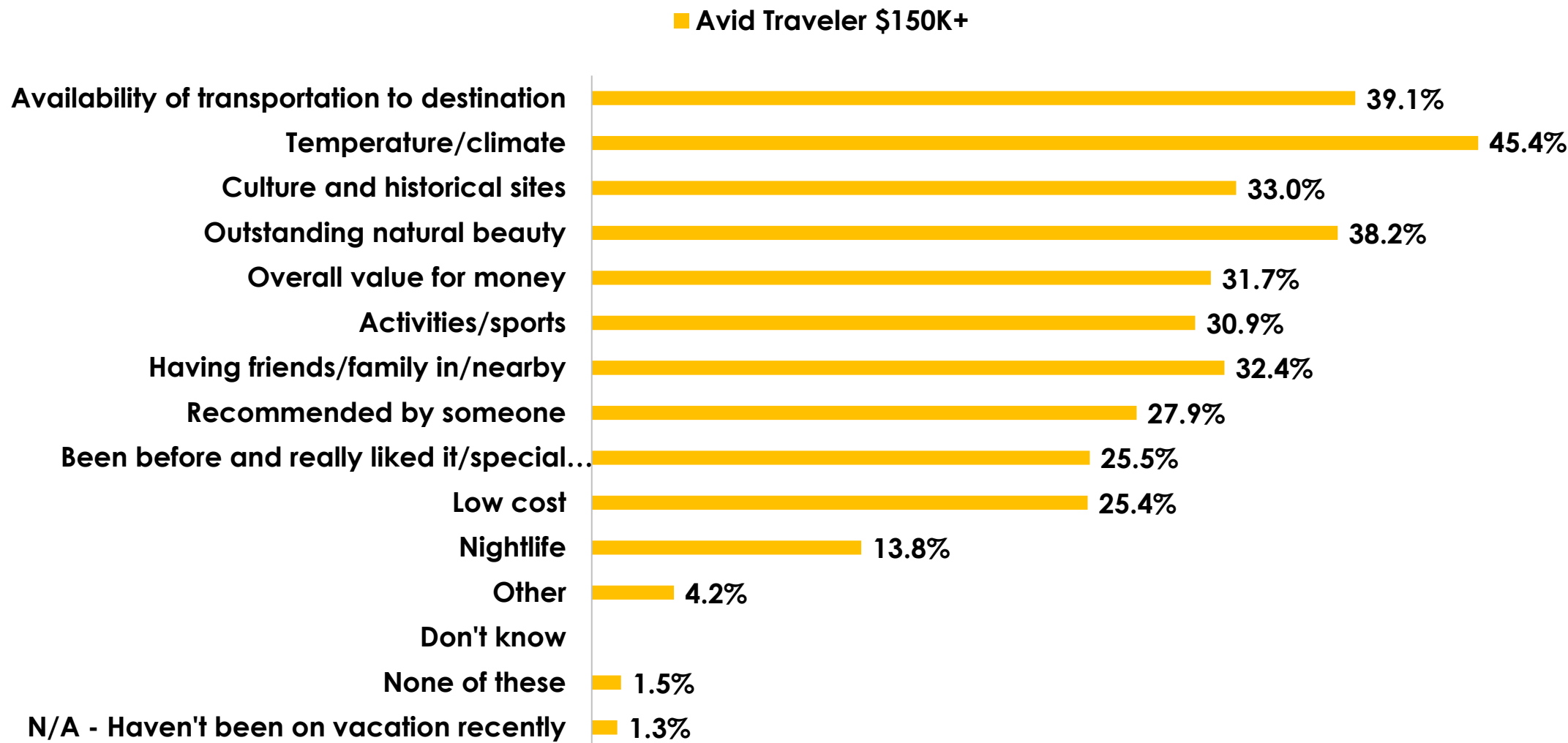
Reason for choosing most recent leisure destination

| Reasons | Avid Traveler \$100K, 25-54, individual | Avid Traveler \$150K, 25-54, 2+ household | Long-Distance Air Traveler under 55 | Nat Rep |
|--|---|---|--|---------|
| The temperature/climate | 39.9% | 45.4% | 32.8% | 23.9% |
| Availability of transportation to destination | 31.6% | 39.1% | 26.9% | 14.5% |
| Culture and historical sites | 25.9% | 33.0% | 27.2% | 18.3% |
| Overall value for money | 34.6% | 31.7% | 26.8% | 30.5% |
| Activities/sports | 29.9% | 30.9% | 27.5% | 16.1% |
| Outstanding natural beauty | 36.1% | 38.2% | 22.8% | 24.2% |
| Nightlife | 14.4% | 13.8% | 19.1% | 8.4% |
| Having friends/family in/nearby | 33.7% | 32.4% | 30.2% | 23.9% |
| Low cost | 27.1% | 25.4% | 29.7% | 22.8% |
| Been before and really liked it/special memory | 28.6% | 25.5% | 24.7% | 18.7% |
| Recommended by someone | 27.3% | 27.9% | 27.9% | 13.2% |
| Other | 6.2% | 4.2% | 3.8% | 6.1% |
| Don't know | 0.3% | 0.0% | 0.0% | 2.2% |
| None of these | 1.4% | 1.5% | 4.9% | 2.3% |
| N/A - Haven't been on vacation recently | 3.1% | 1.3% | 2.6% | 24.3% |

Reason for choosing most recent leisure destination

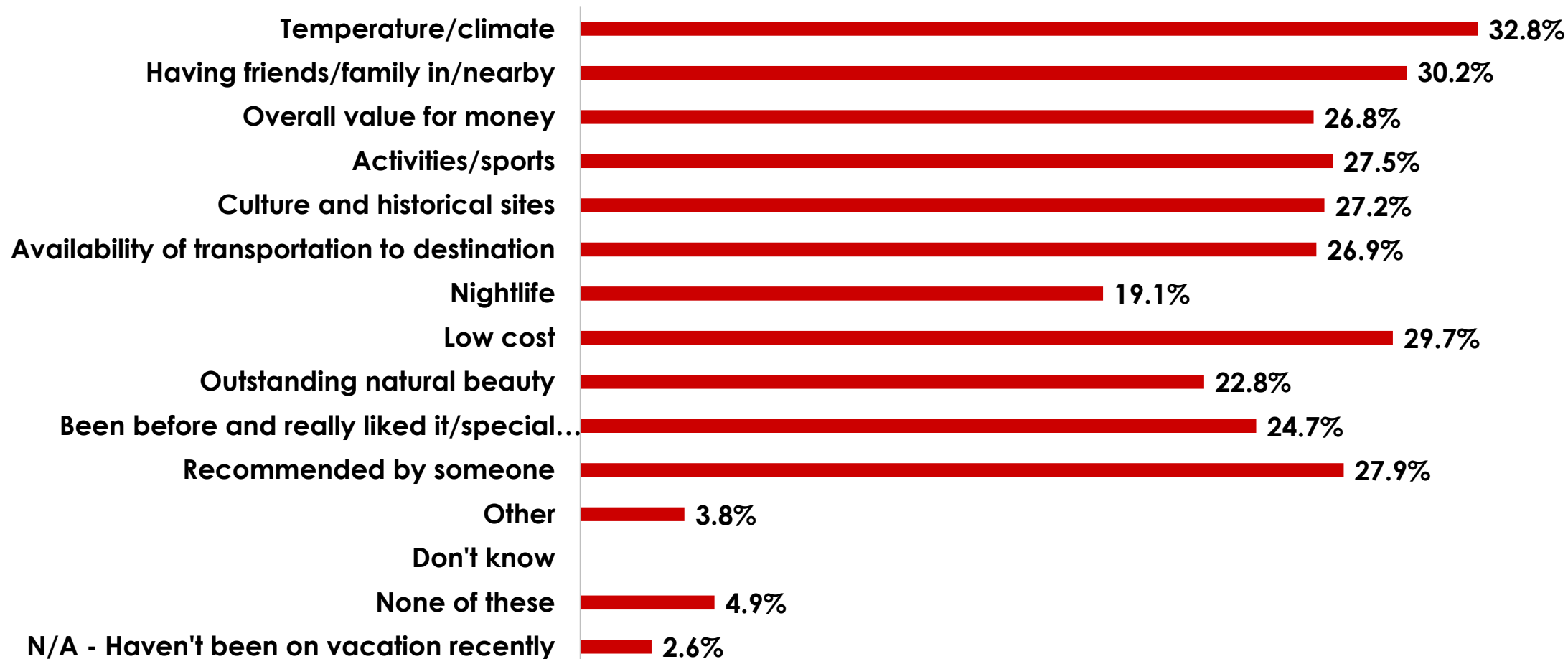


Reason for choosing most recent leisure destination

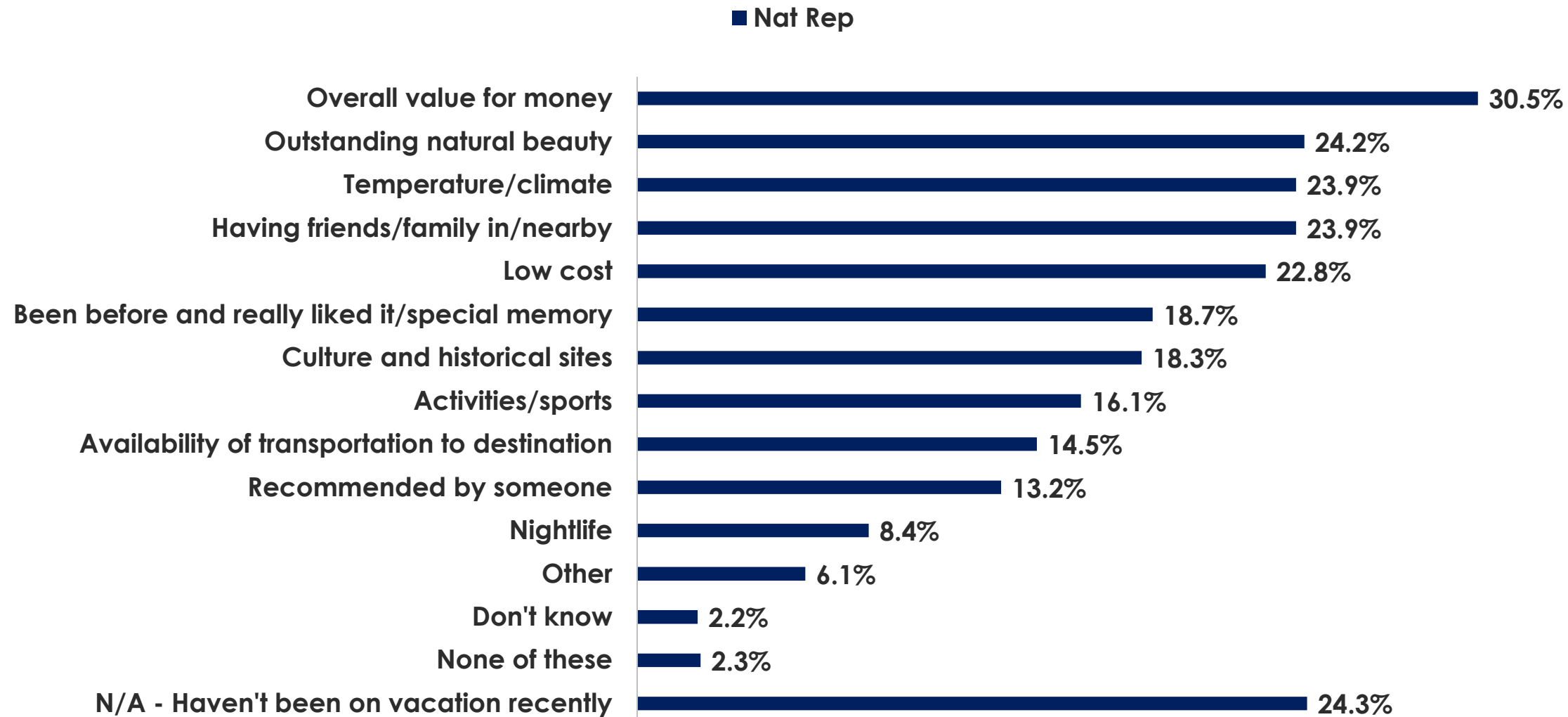


Reason for choosing most recent leisure destination

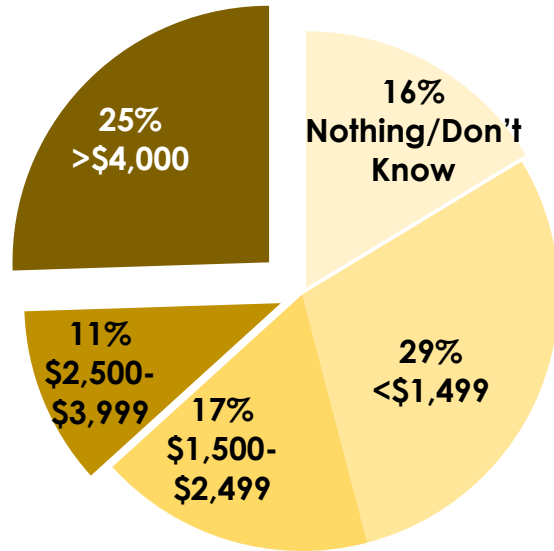
■ Long-Distance Air Traveler under 55



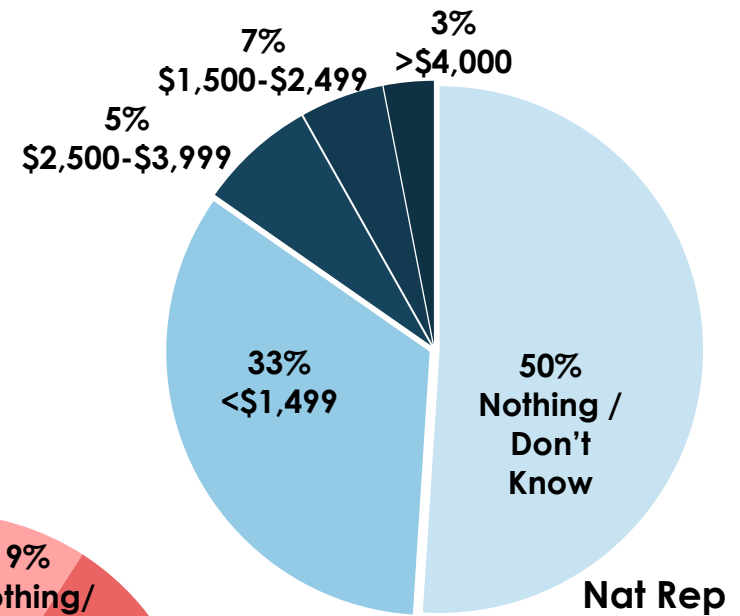
Reason for choosing most recent leisure destination



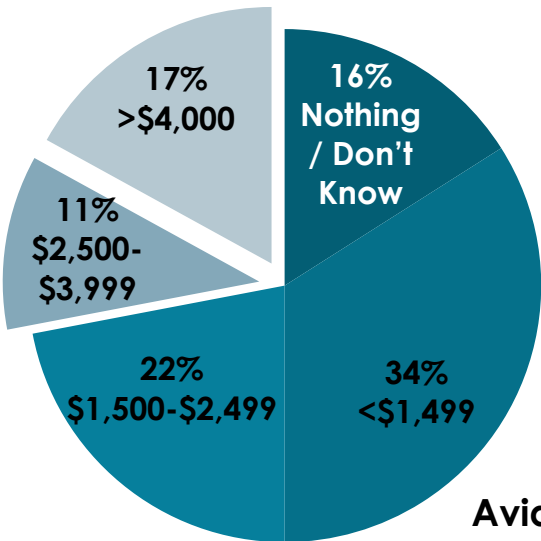
Most recent leisure trip - total spend



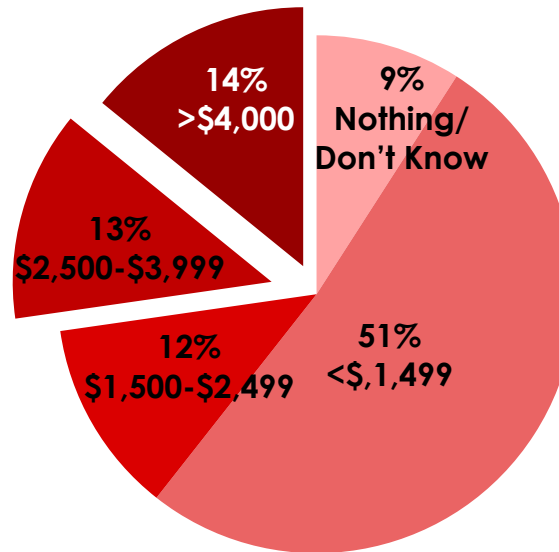
Avid Travelers \$150K+



Nat Rep



Avid Travelers \$100K+

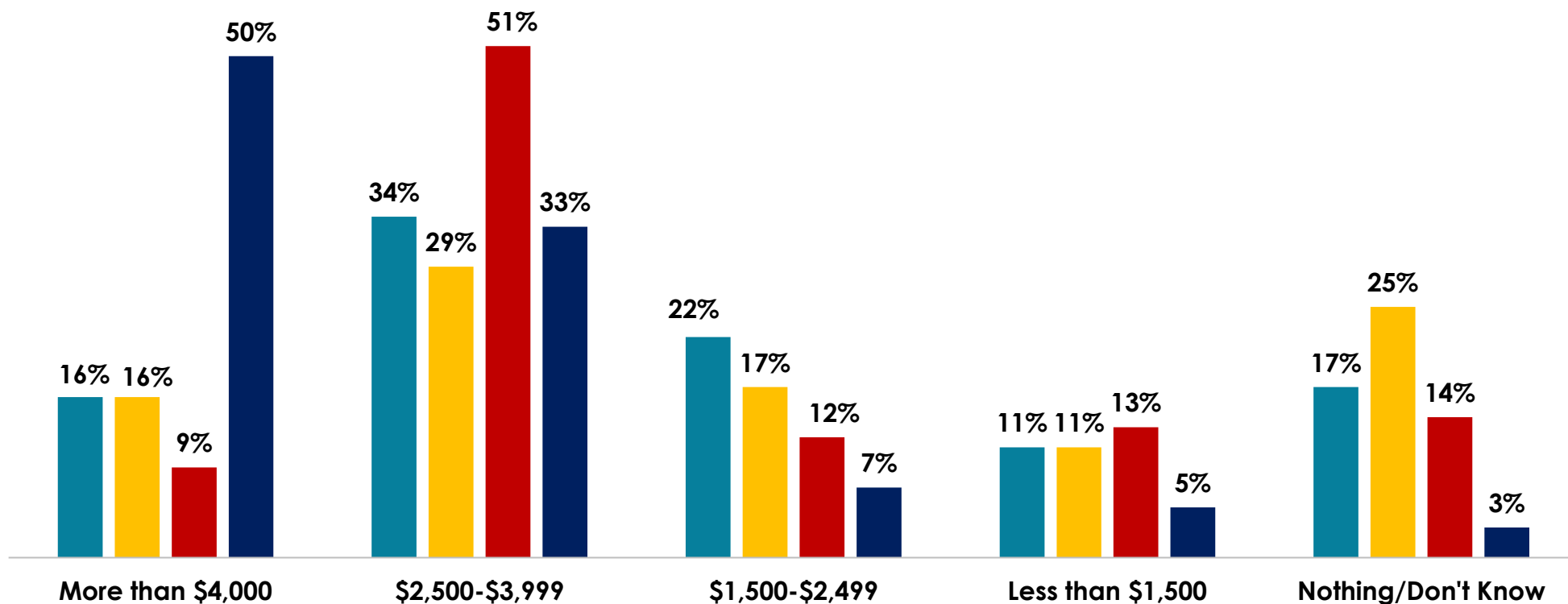


Long-Distance Air Travelers under 55

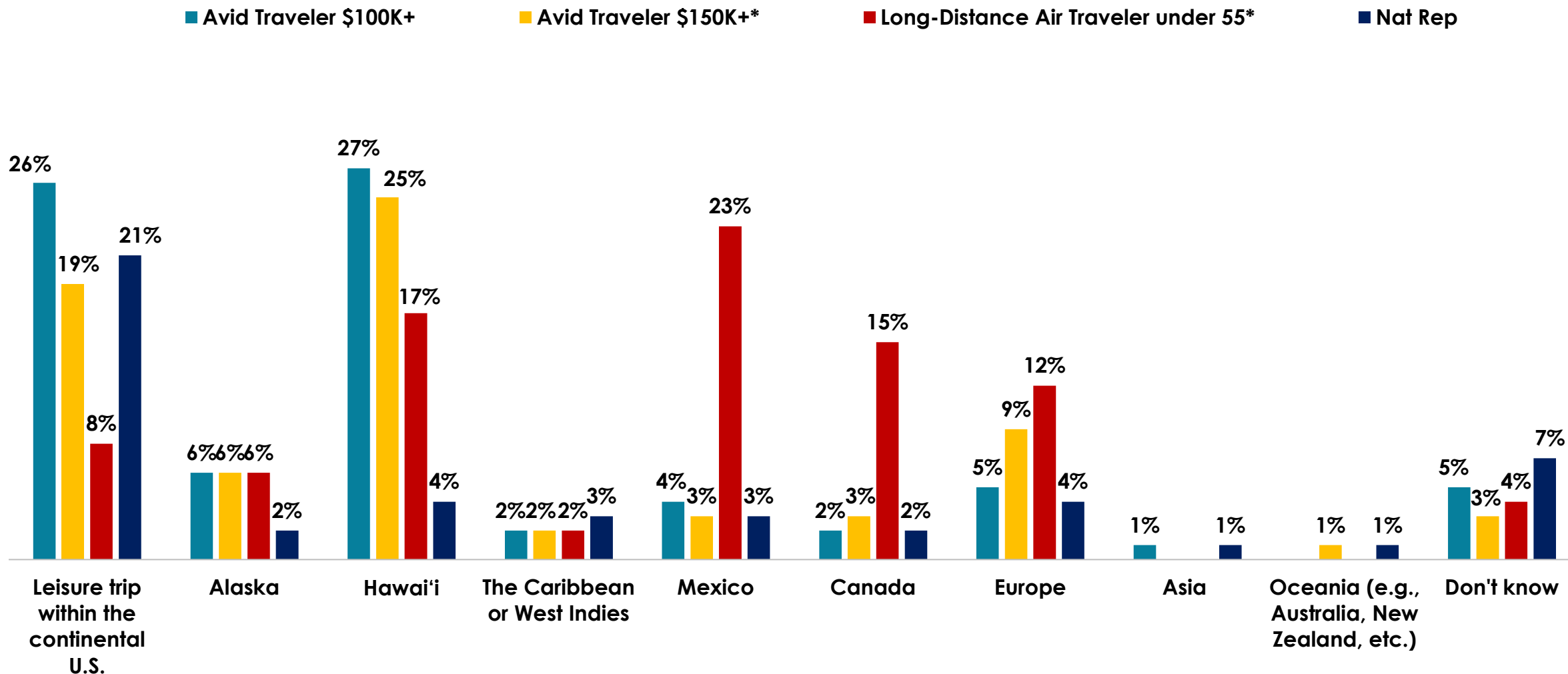
Based on Hawai'i Tourism Authority data, the average U.S. per person per trip spend for 2019 was \$1,693.32.

Most recent leisure trip - total spend

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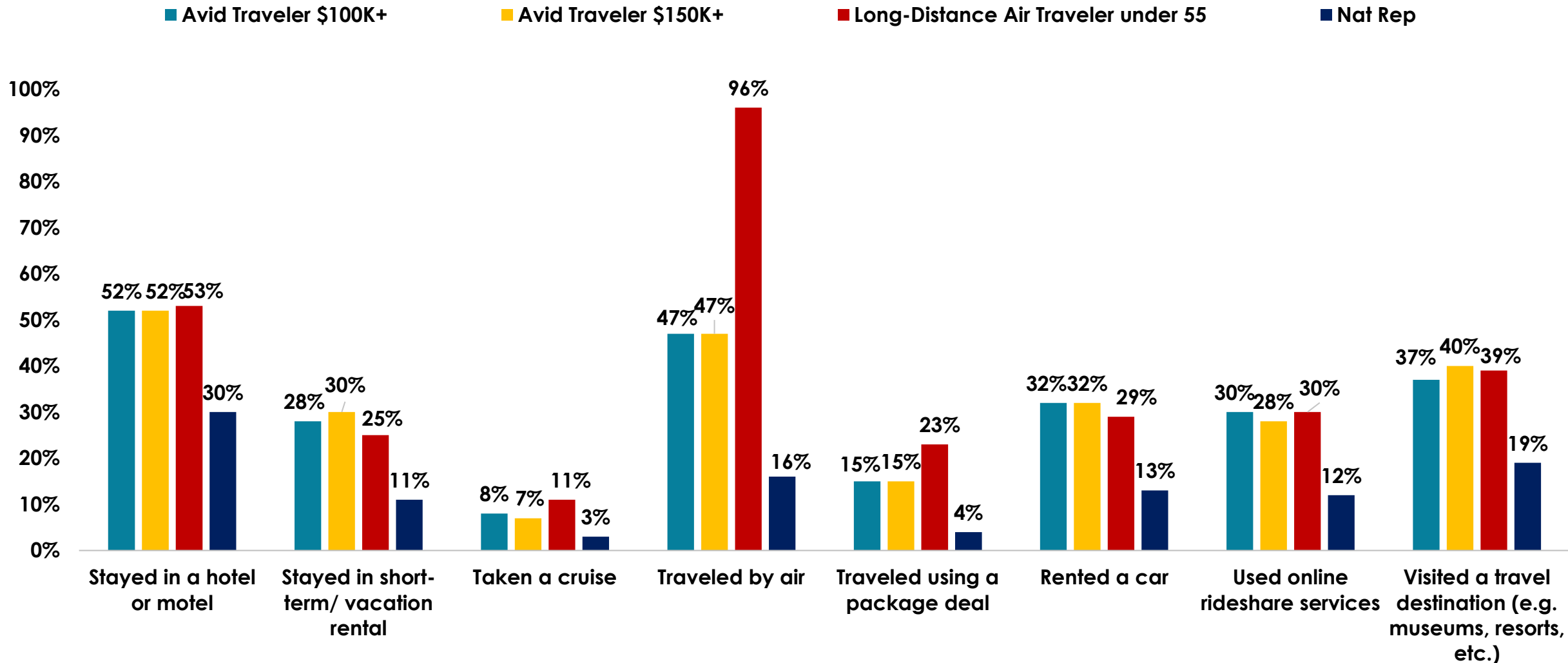
Leisure trip - next destination



*YouGov sample size <100

Source: HVCB analysis of YouGov data provided by HTA as of November 7, 2021

Leisure trip - activities in last 12 months



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
 ■ Nat Rep



Booking & Spending Attitudes

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

