

COVID-19 Impact on U.S. Avid Travelers

An HVCB analysis of YouGov data provided by HTA as of March 14, 2021

Reported on March 19, 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)

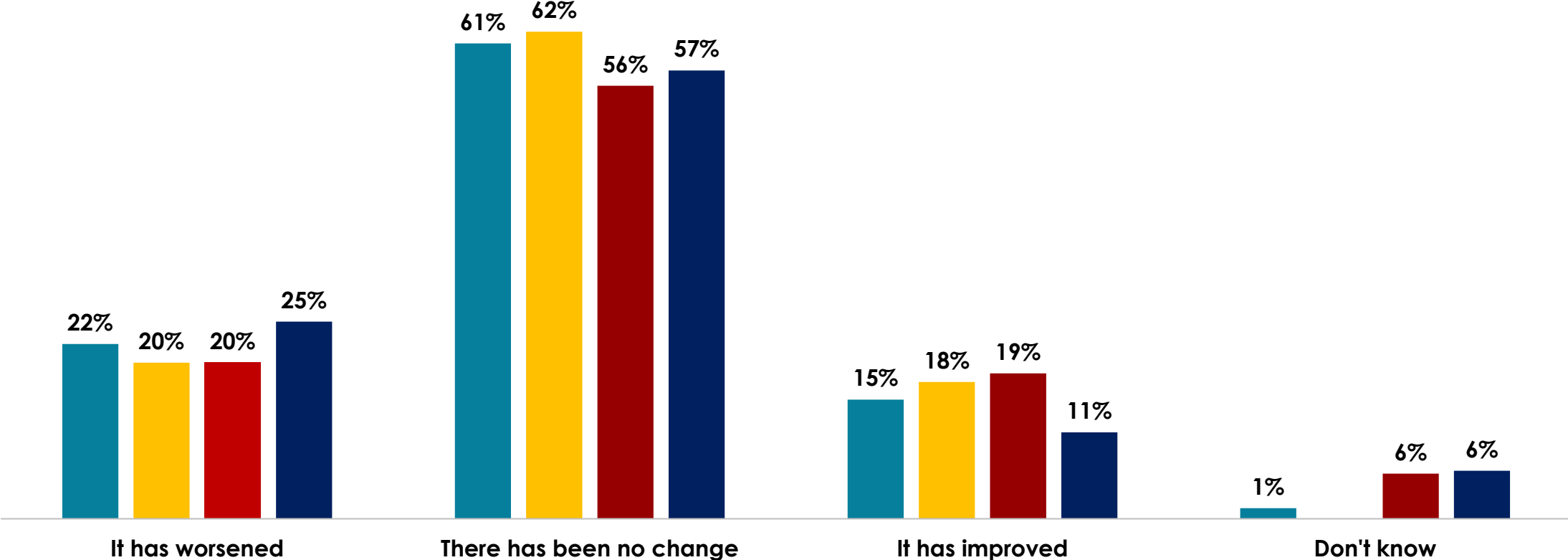
- Representative of U.S. adults in terms of age, gender, social class and education



Travelers' Pandemic Outlook

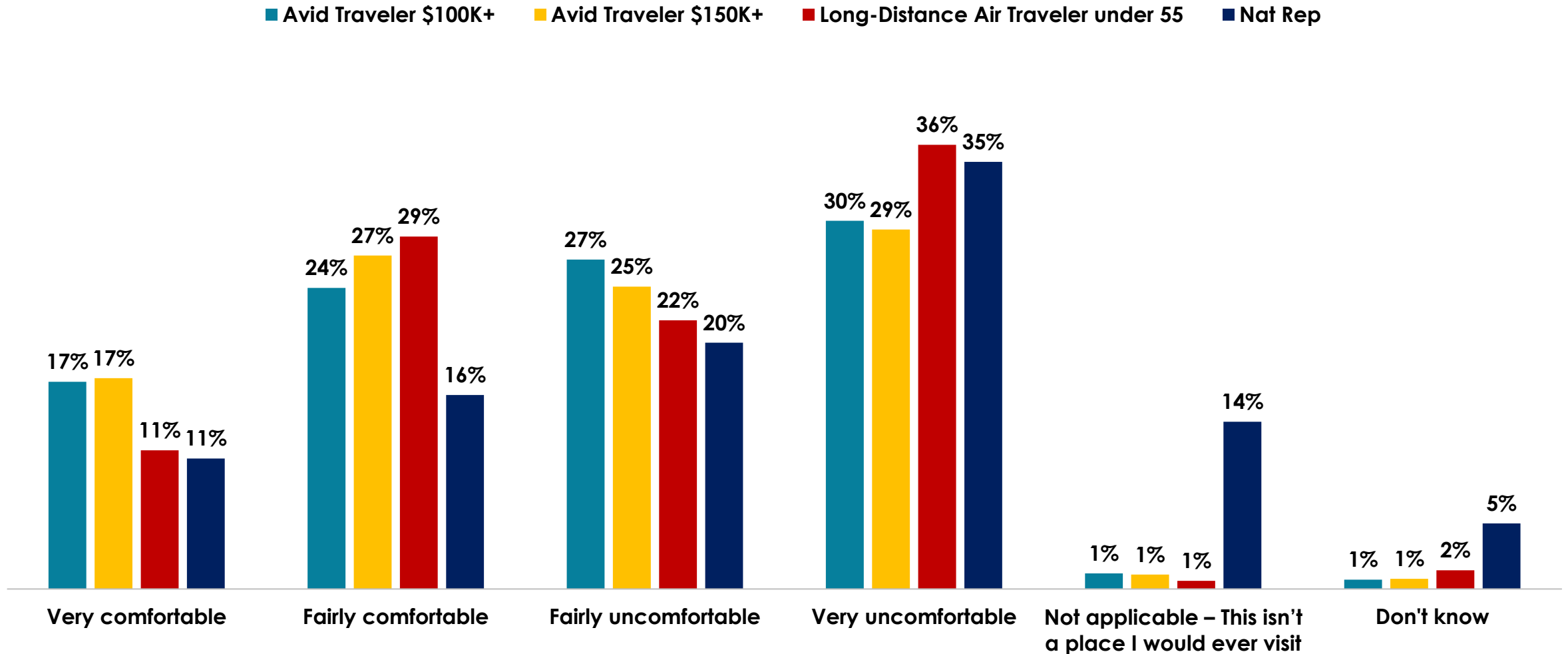
How has your household economic situation changed in the past month?

■ 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 March 14, 2021

Level of comfort visiting an airport right now

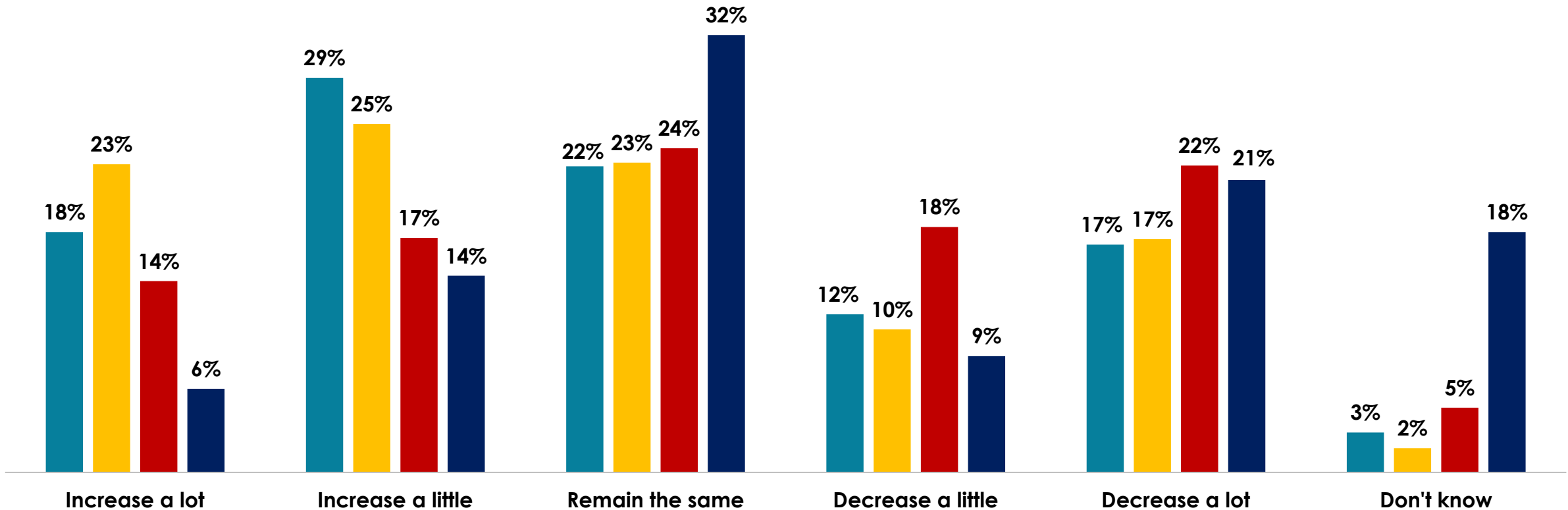




Future Travel Plans

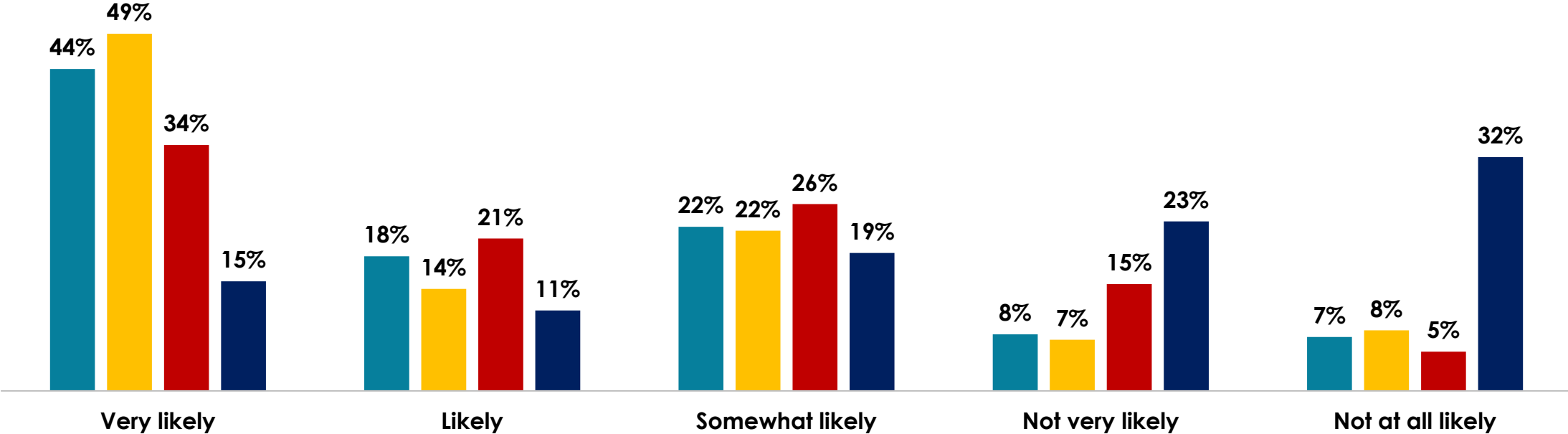
Future Travel – Expected change to air travel in the next 12 months

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



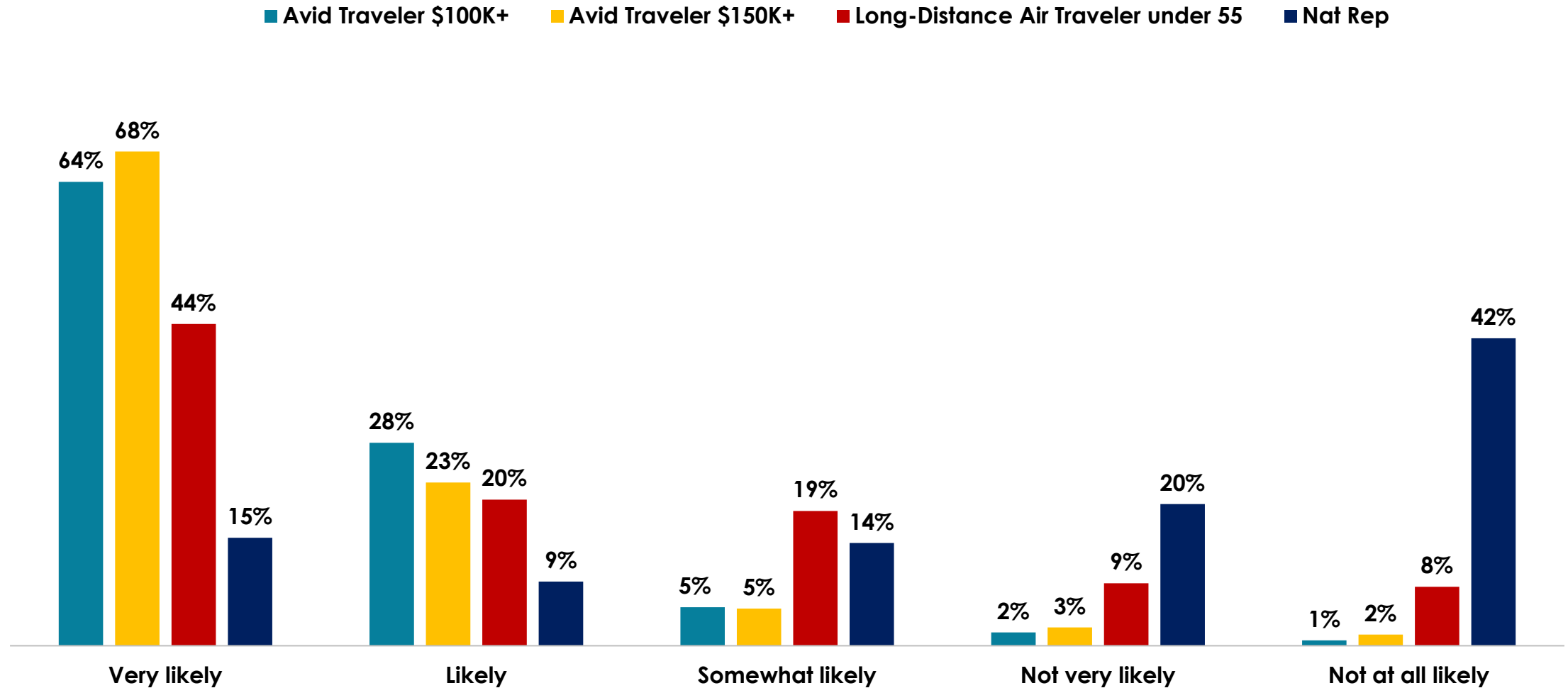
Future Travel – Likelihood of purchasing travel or leisure services in the next 12 months

■ 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



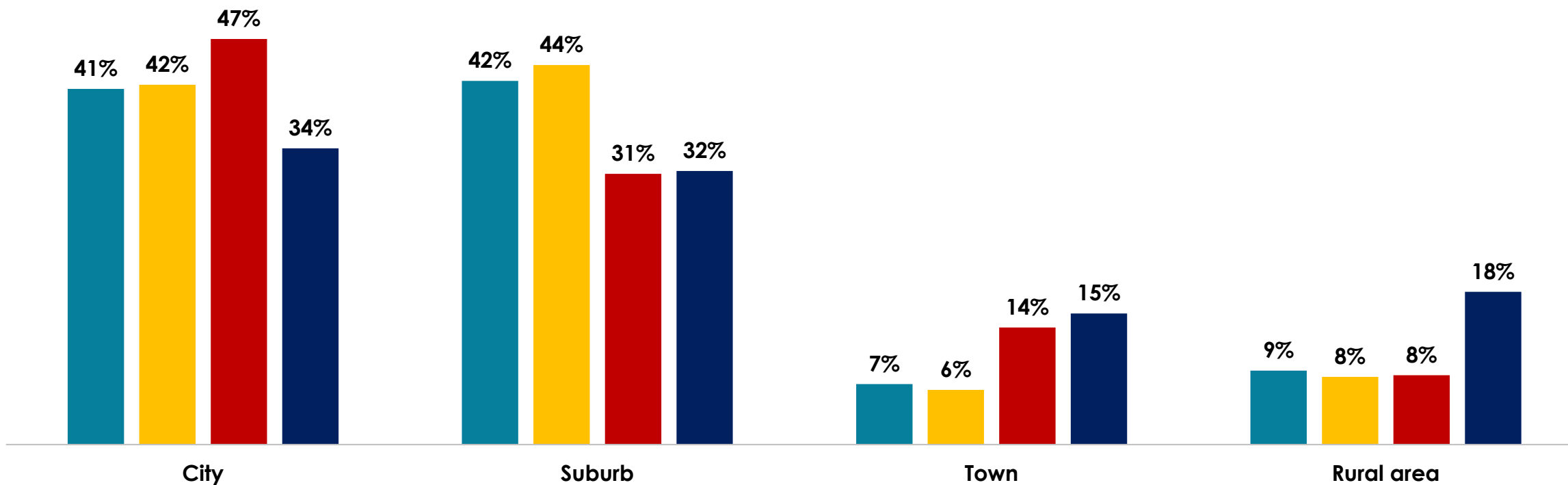


Traveler Profiles

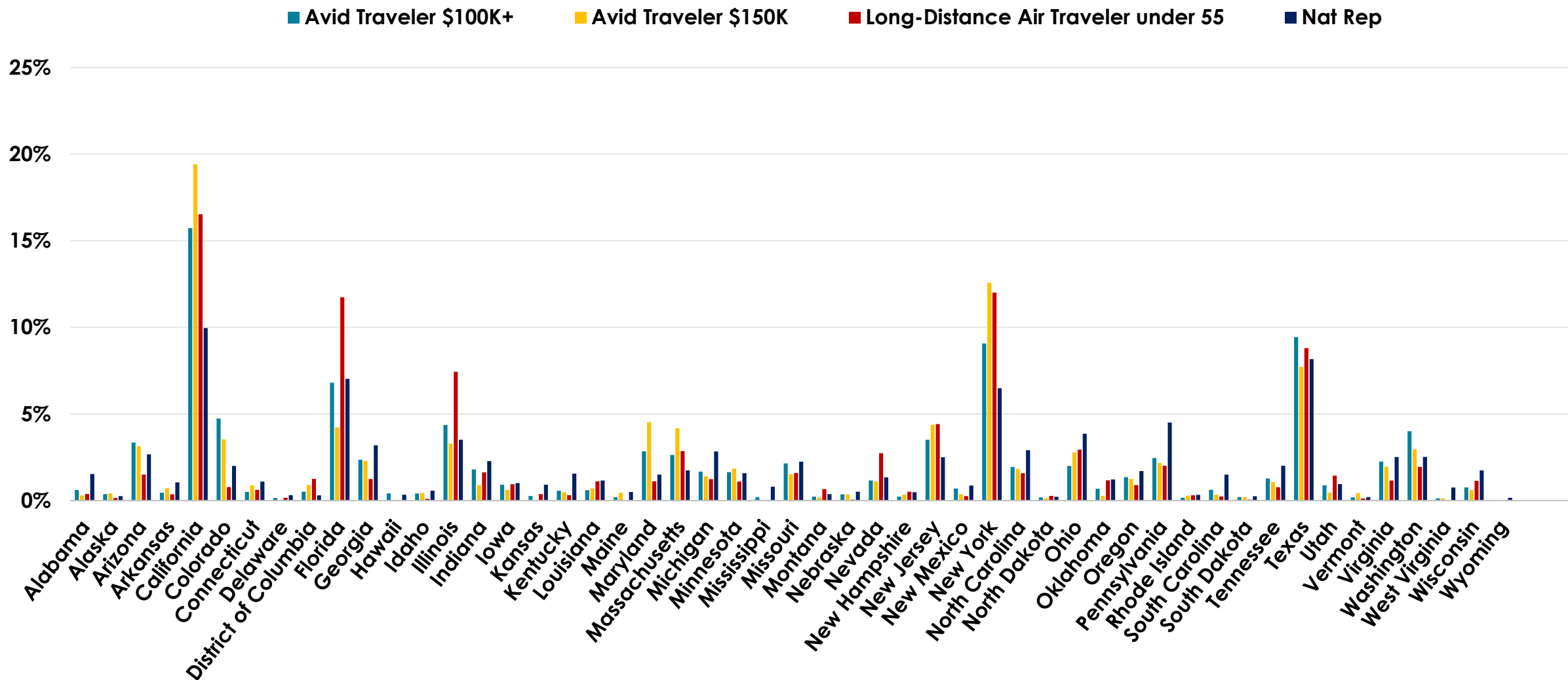
Avid Travelers vs. Long-Distance Air Travelers vs. Nat. Rep.

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 Travelers \$100K+, individual	
California	15.7%
Texas	9.4%
New York	9.1%
Florida	6.8%
Colorado	4.7%
Illinois	4.4%
Washington	4.0%
New Jersey	3.5%
Arizona	3.3%
Maryland	2.8%

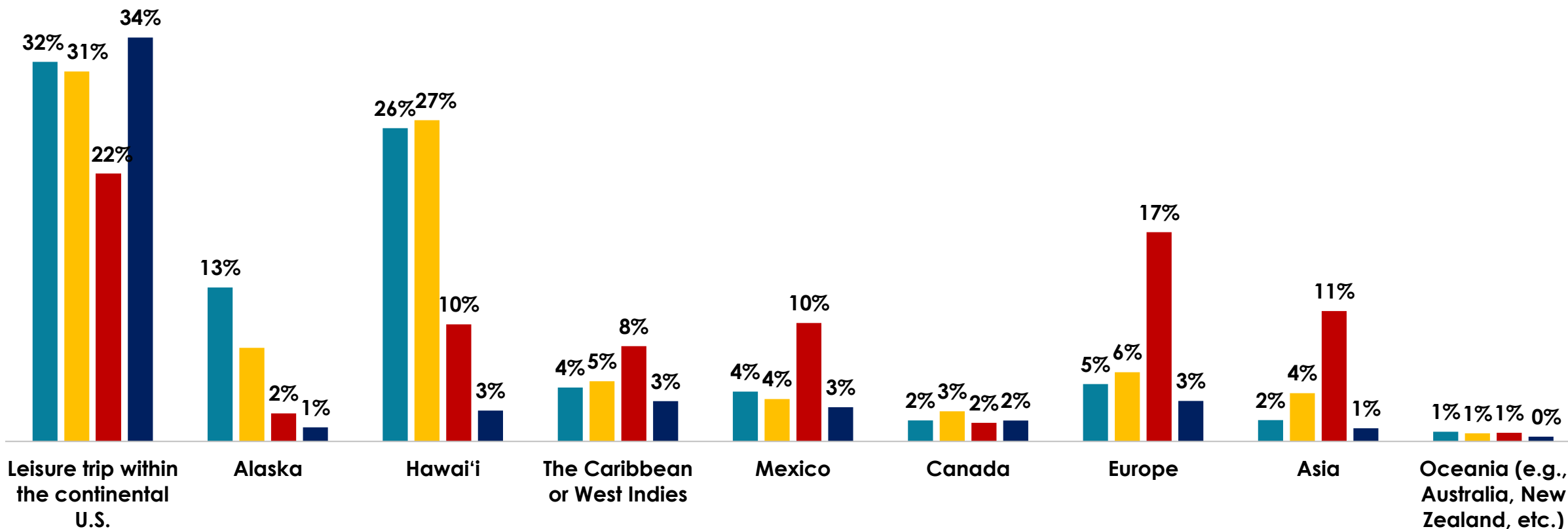
Avid Travelers \$150K+, 2+ household	
California	19.4%
New York	12.6%
Texas	7.7%
Maryland	4.5%
New Jersey	4.4%
Florida	4.2%
Massachusetts	4.2%
Colorado	3.5%
Illinois	3.3%
Arizona	3.1%

Long-Distance Air Travelers under 55	
California	16.5%
New York	12.0%
Florida	11.7%
Texas	8.8%
Illinois	7.4%
New Jersey	4.4%
Ohio	2.9%
Massachusetts	2.9%
Nevada	2.7%
Pennsylvania	2.0%

Nat Rep	
California	10.0%
Texas	8.2%
Florida	7.0%
New York	6.5%
Pennsylvania	4.5%
Ohio	3.9%
Illinois	3.5%
Georgia	3.2%
North Carolina	2.9%
Michigan	2.8%

Leisure trip – most recent destination

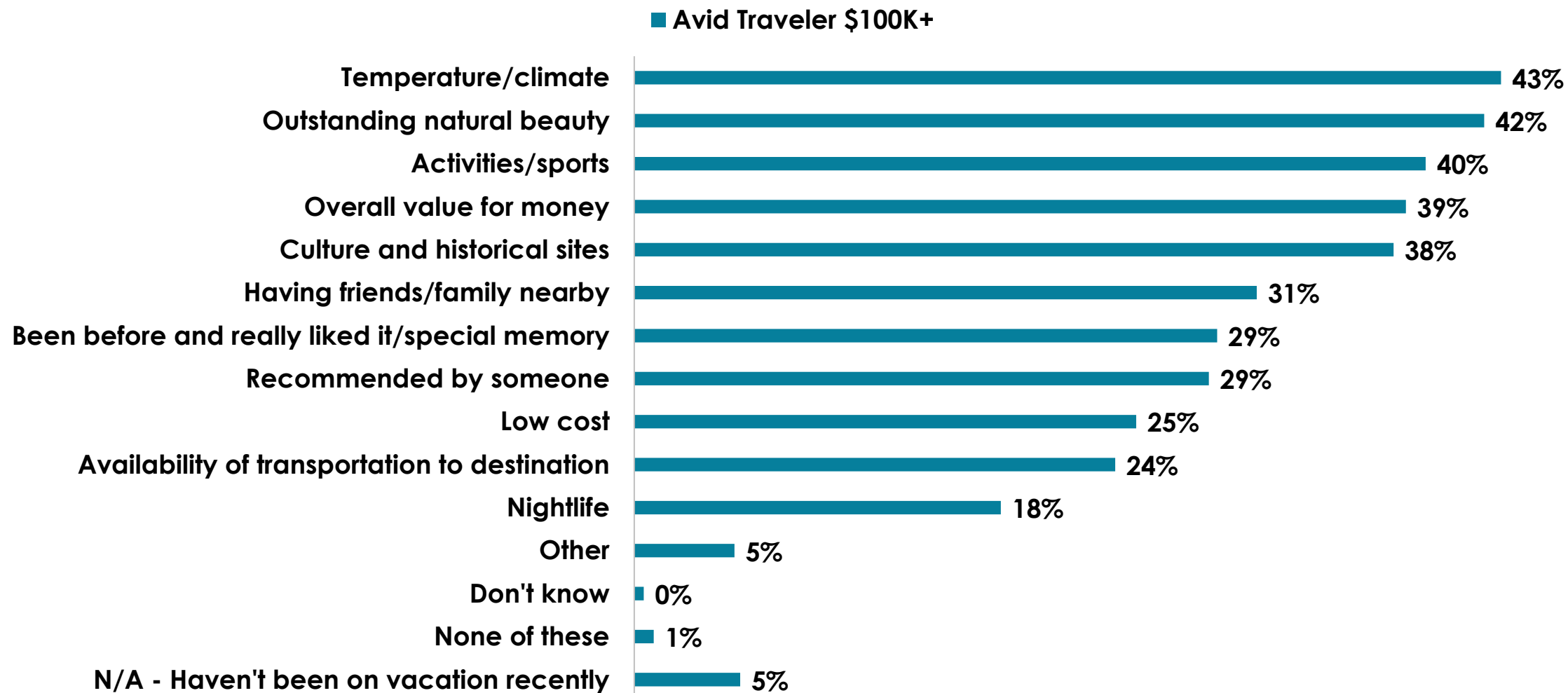
■ Avid Traveler \$100K+
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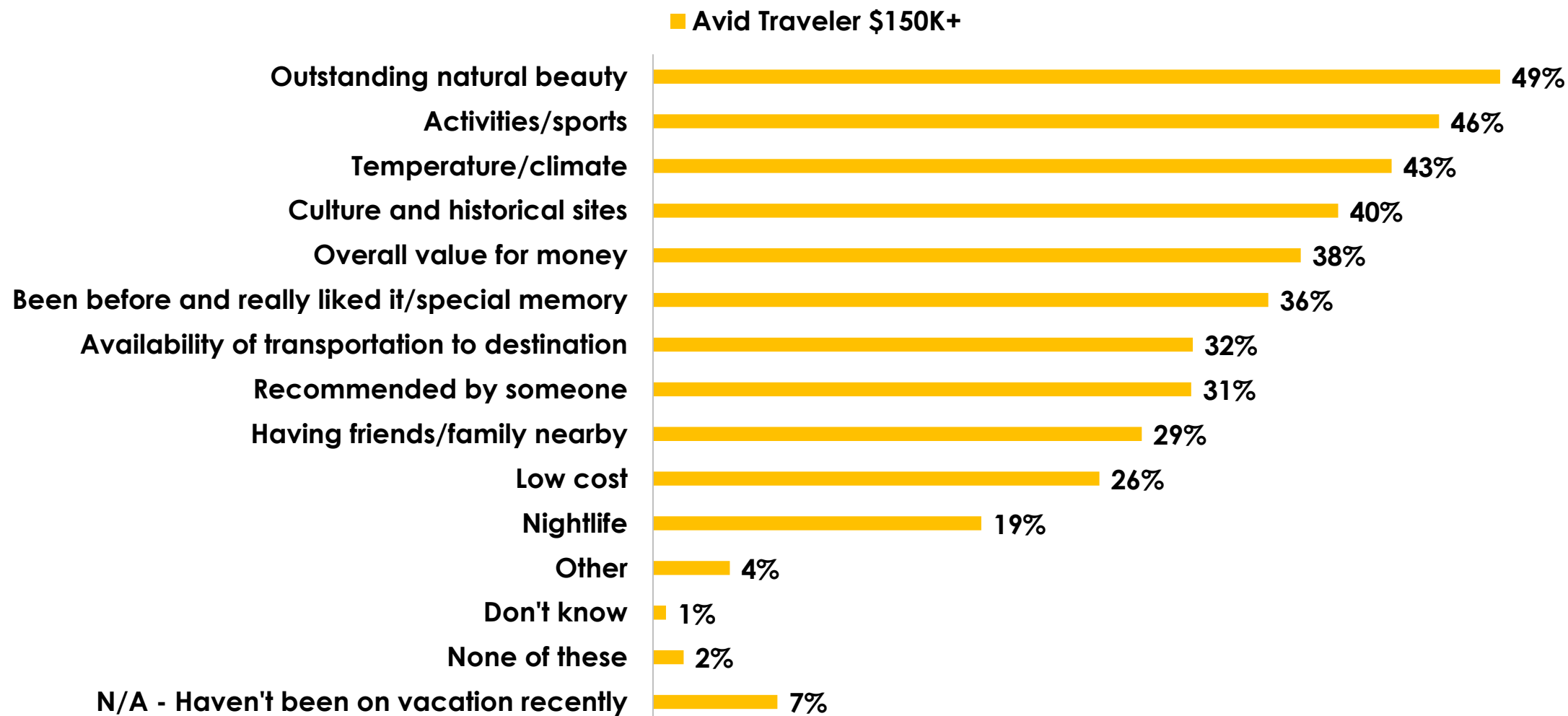
Reason for choosing most recent leisure destination

Reasons	Avid Travelers \$100K+, individual	Avid Travelers \$150K+, 2+ household	Long-Distance Air Travelers under 55	Nat Rep
Temperature/climate	43.3%	43.1%	37.7%	23.0%
Outstanding natural beauty	42.5%	49.5%	32.5%	23.1%
Activities/sports	39.6%	45.9%	21.0%	16.0%
Overall value for money	38.6%	37.8%	41.1%	28.6%
Culture and historical sites	38.0%	40.0%	41.1%	18.7%
Having friends/family nearby	31.1%	28.5%	28.9%	23.9%
Been before and really liked it/special memory	29.1%	35.9%	13.9%	17.5%
Recommended by someone	28.7%	31.4%	19.9%	12.9%
Low cost	25.1%	26.1%	28.1%	21.7%
Availability of transportation to destination	24.0%	31.5%	30.9%	13.3%
Nightlife	18.3%	19.2%	12.0%	7.5%
Other	5.0%	4.5%	5.8%	5.6%
Don't know	0.5%	0.8%	2.6%	2.8%
None of these	1.0%	1.8%	0.3%	2.8%
N/A - Haven't been on vacation recently	5.3%	7.3%	5.9%	25.6%

Reason for choosing most recent leisure destination

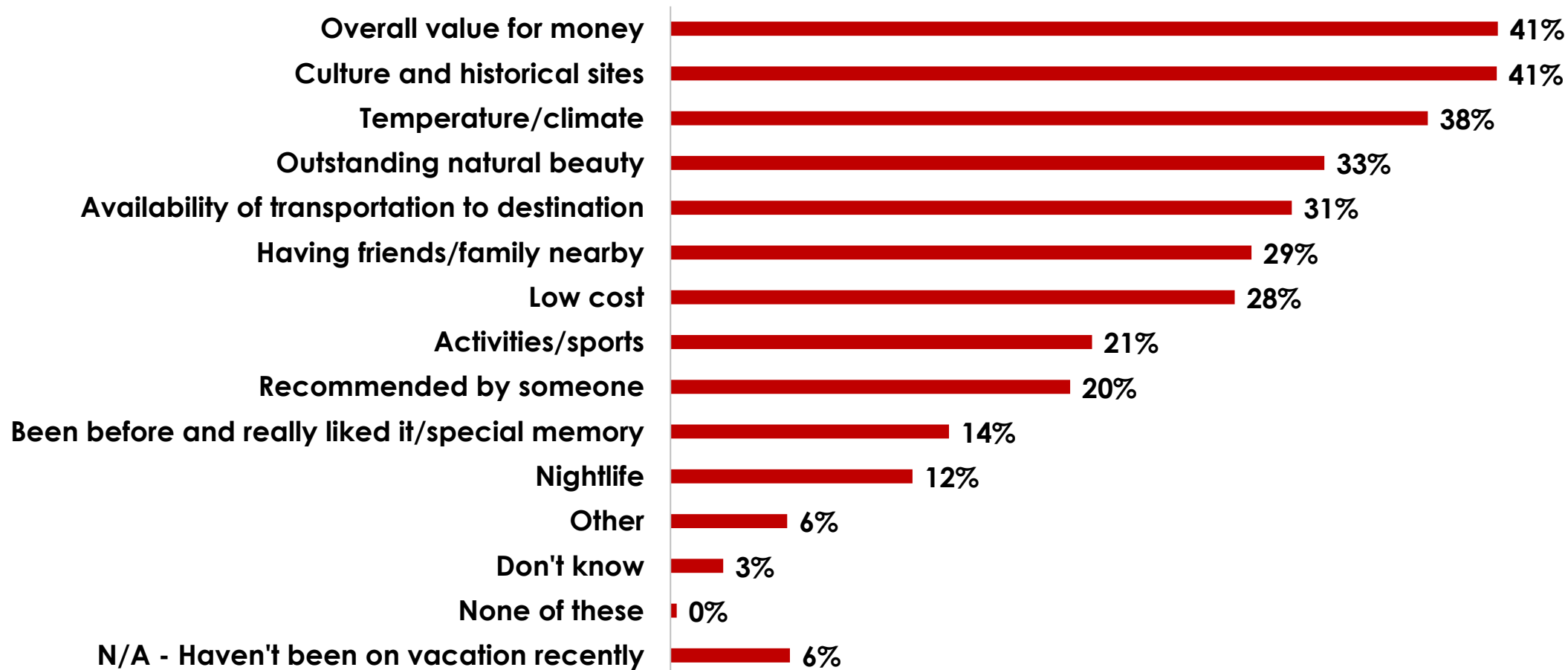


Reason for choosing most recent leisure destination

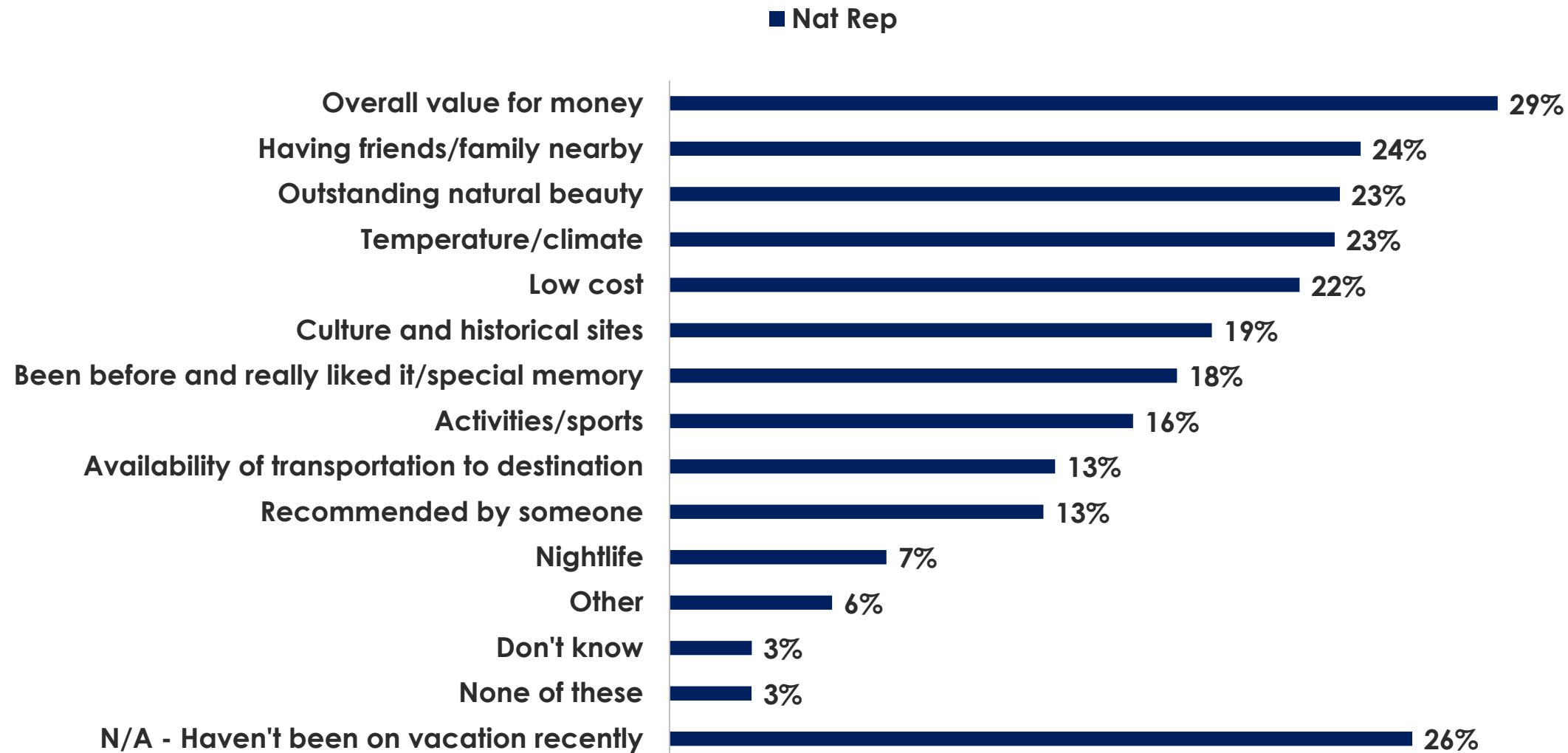


Reason for choosing most recent leisure destination

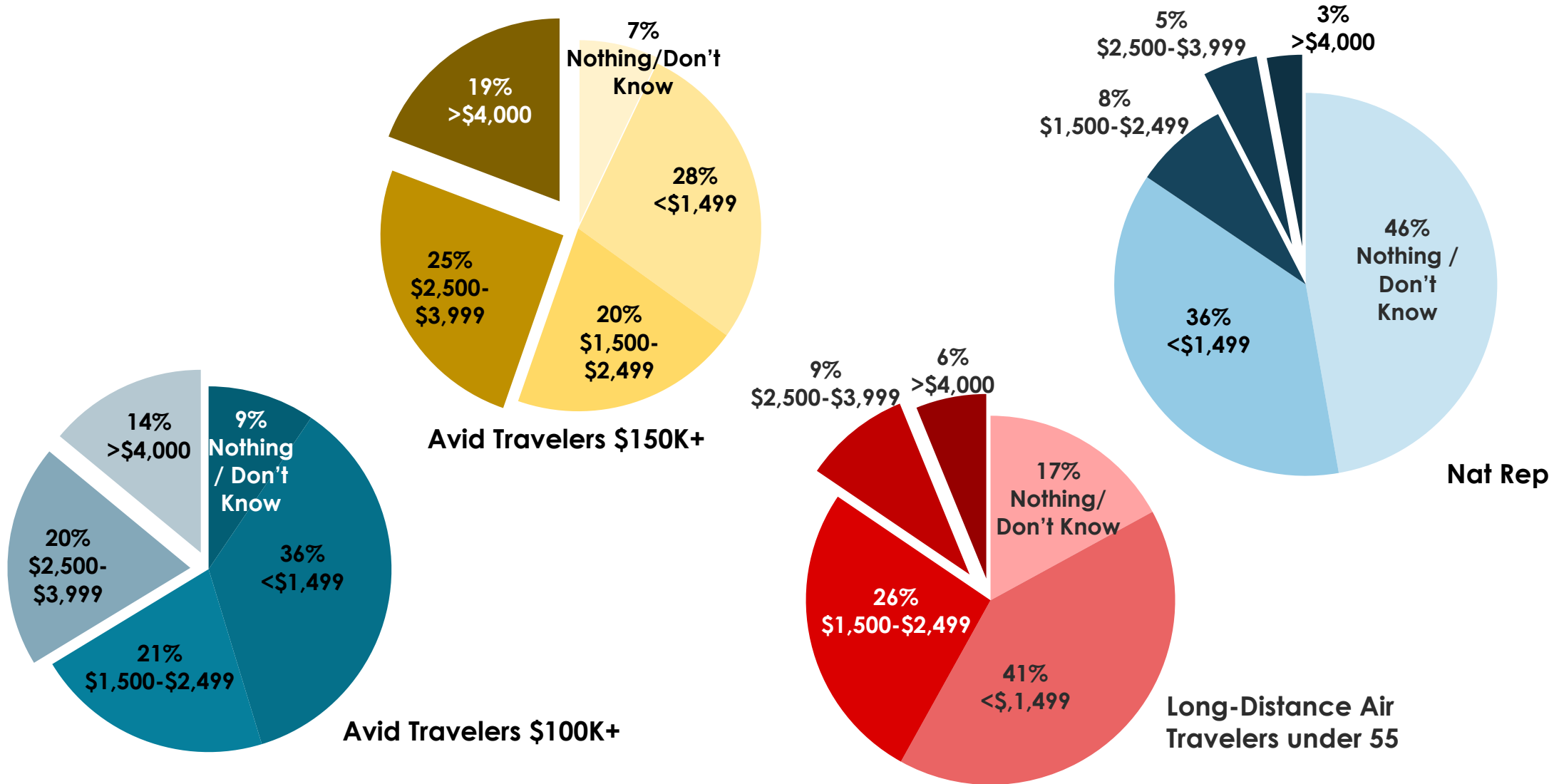
■ Long-Distance Air Traveler under 55



Reason for choosing most recent leisure destination



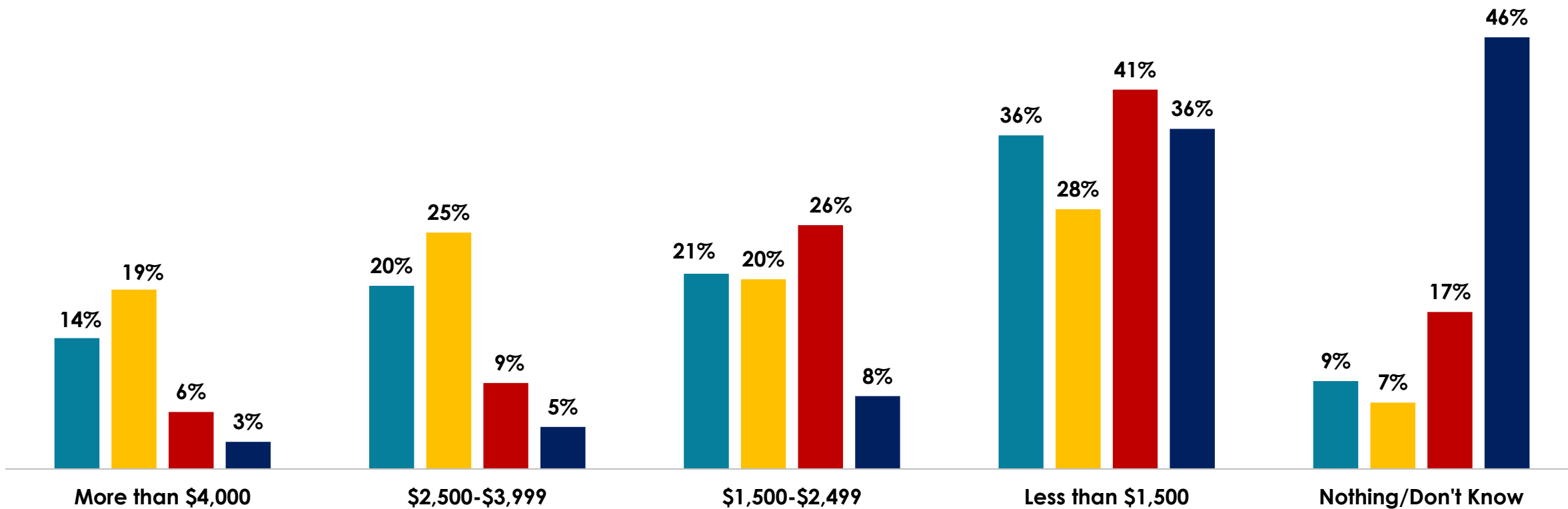
Most recent leisure trip - total spend



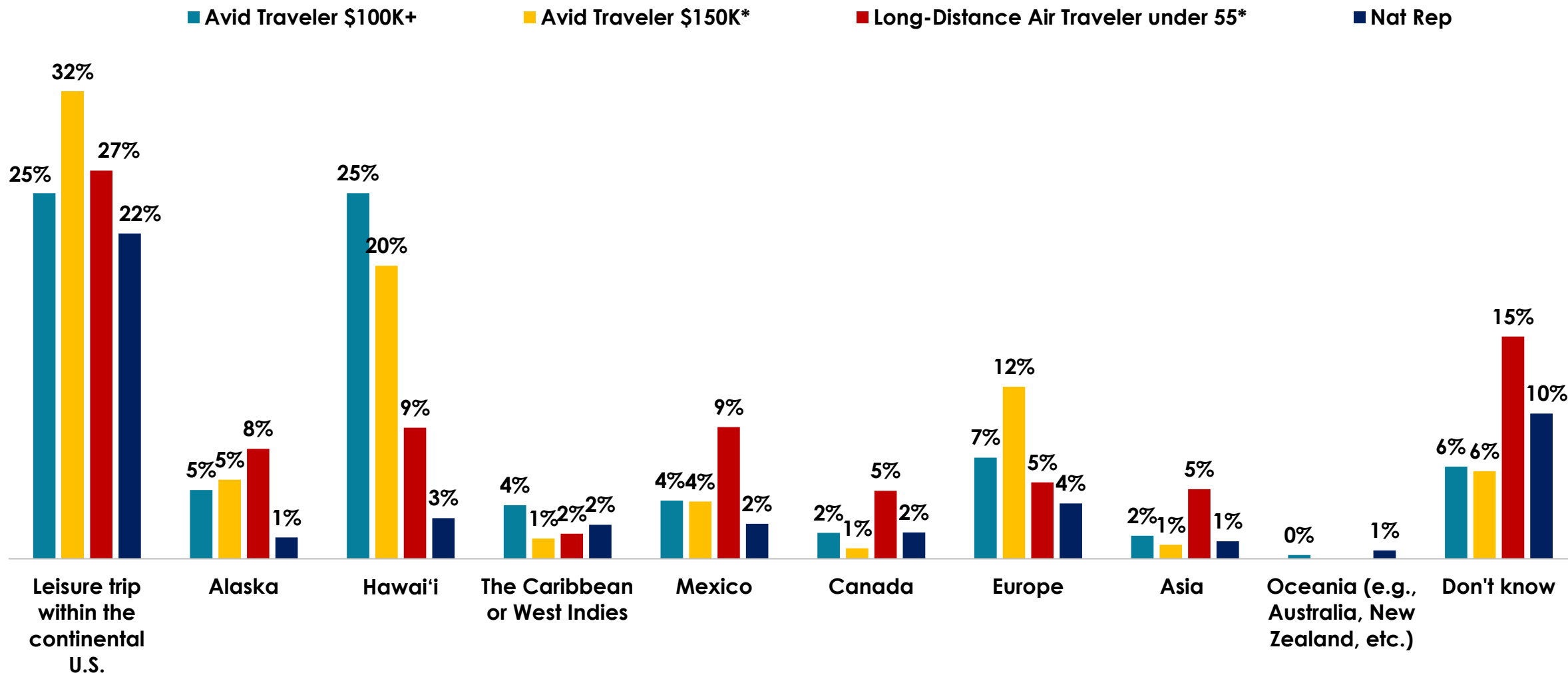
Based on Hawai'i Tourism Authority data, the average U.S. per person per trip spend for 2019 was \$1,693.32.

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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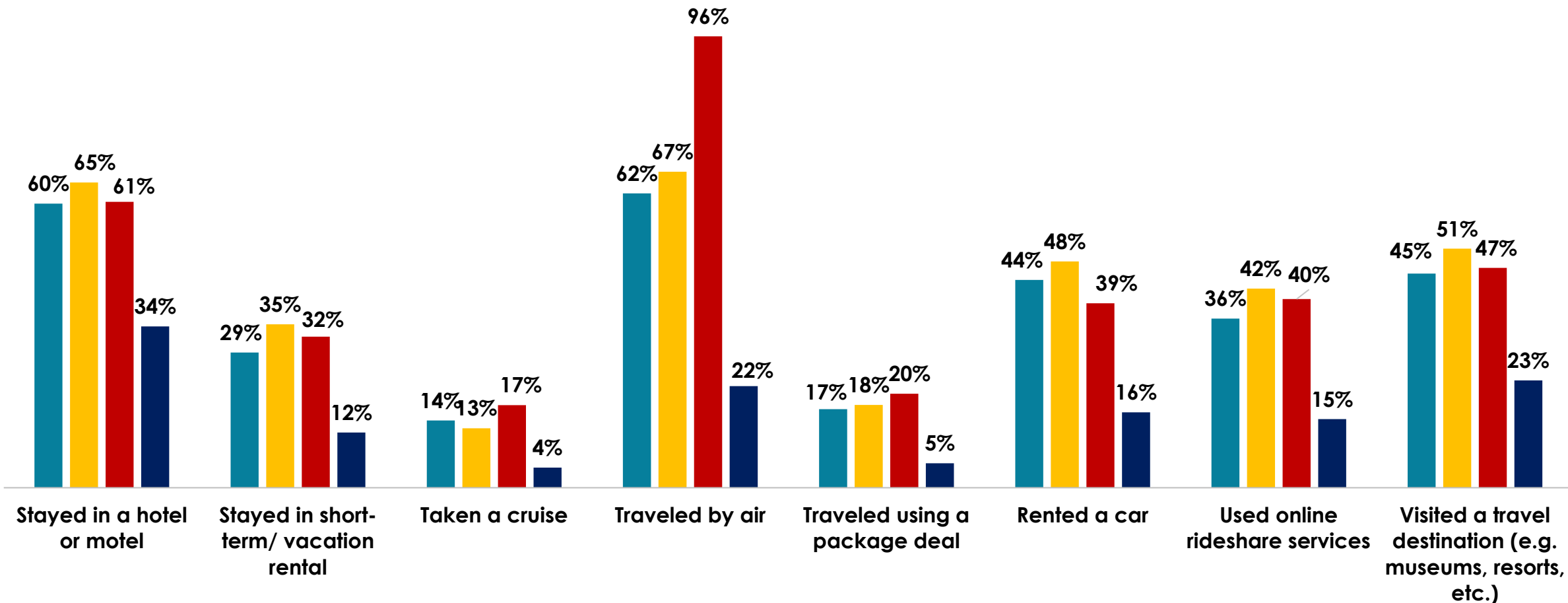
Leisure trip - activities in last 12 months

■ Avid Traveler \$100K+

■ Avid Traveler \$150K+

■ Long-Distance Air Traveler under 55

■ Nat Rep



Travel Mindset

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



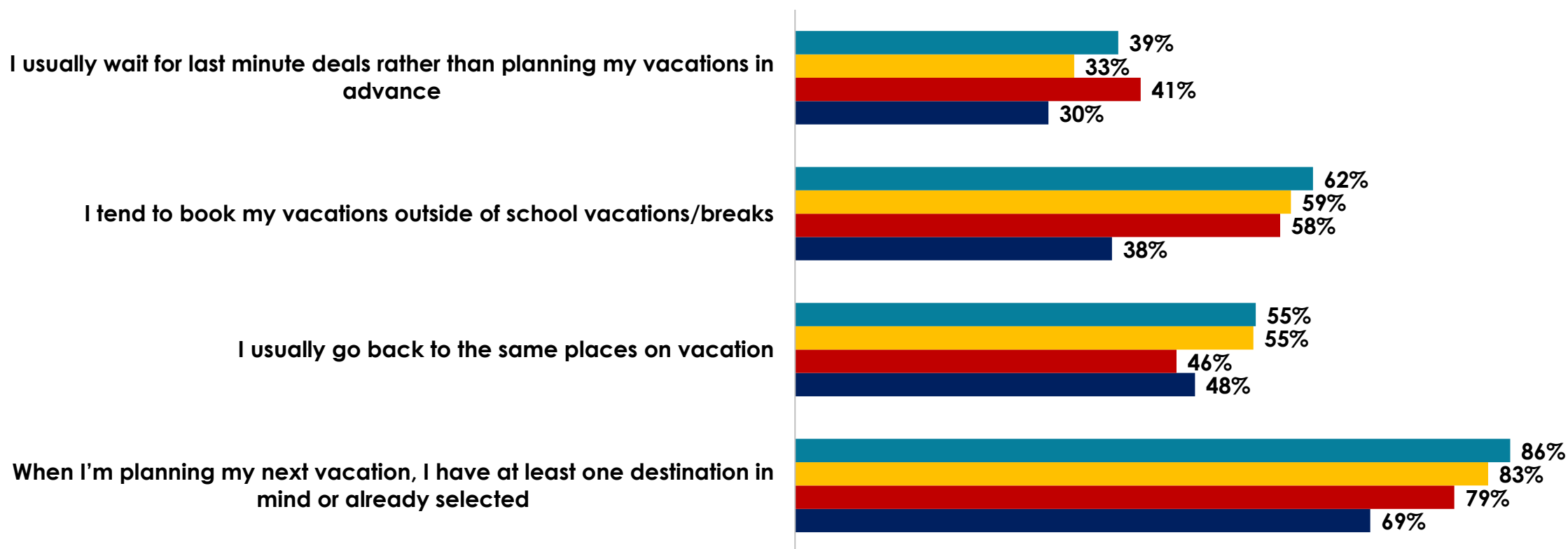
Travel Activities

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Booking & Spending Attitudes

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



Booking & Spending Attitudes

