

COVID-19 Impact on U.S. Avid Travelers

An HVCB analysis of YouGov data provided by HTA as of June 13, 2021

Reported on June 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)

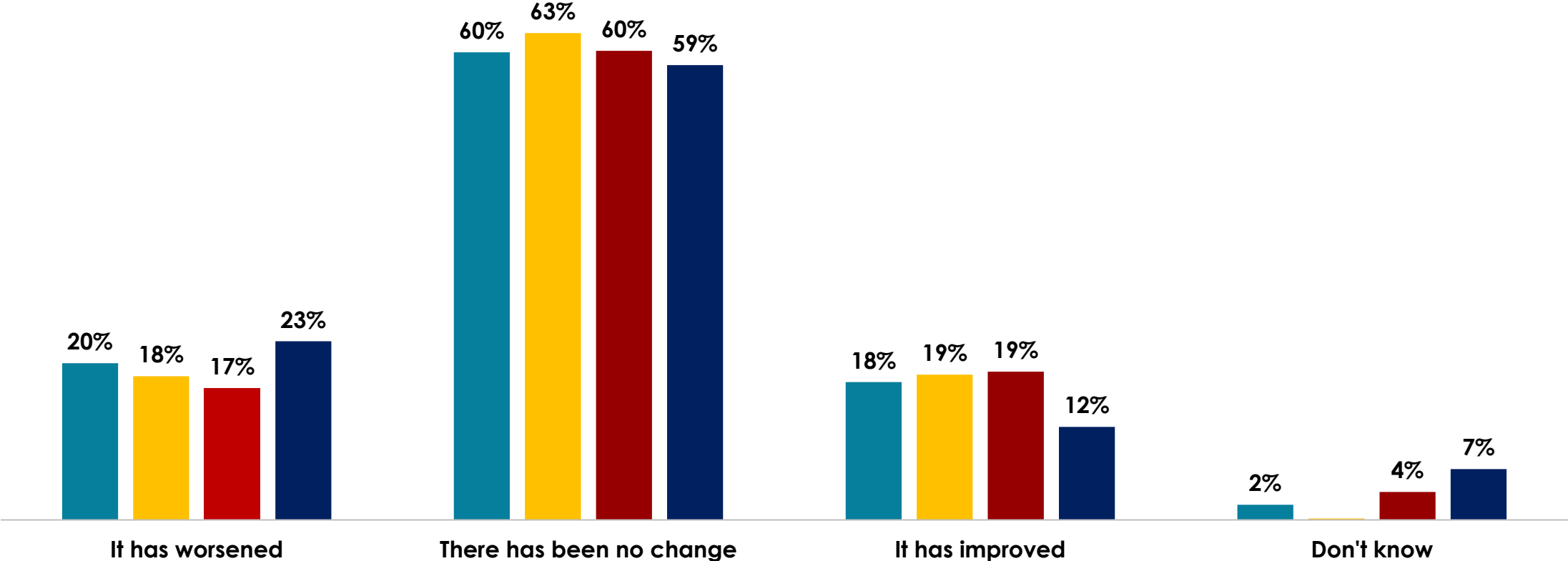
- Representative of U.S. adults in terms of age, gender, social class and education



Travelers' Pandemic Outlook

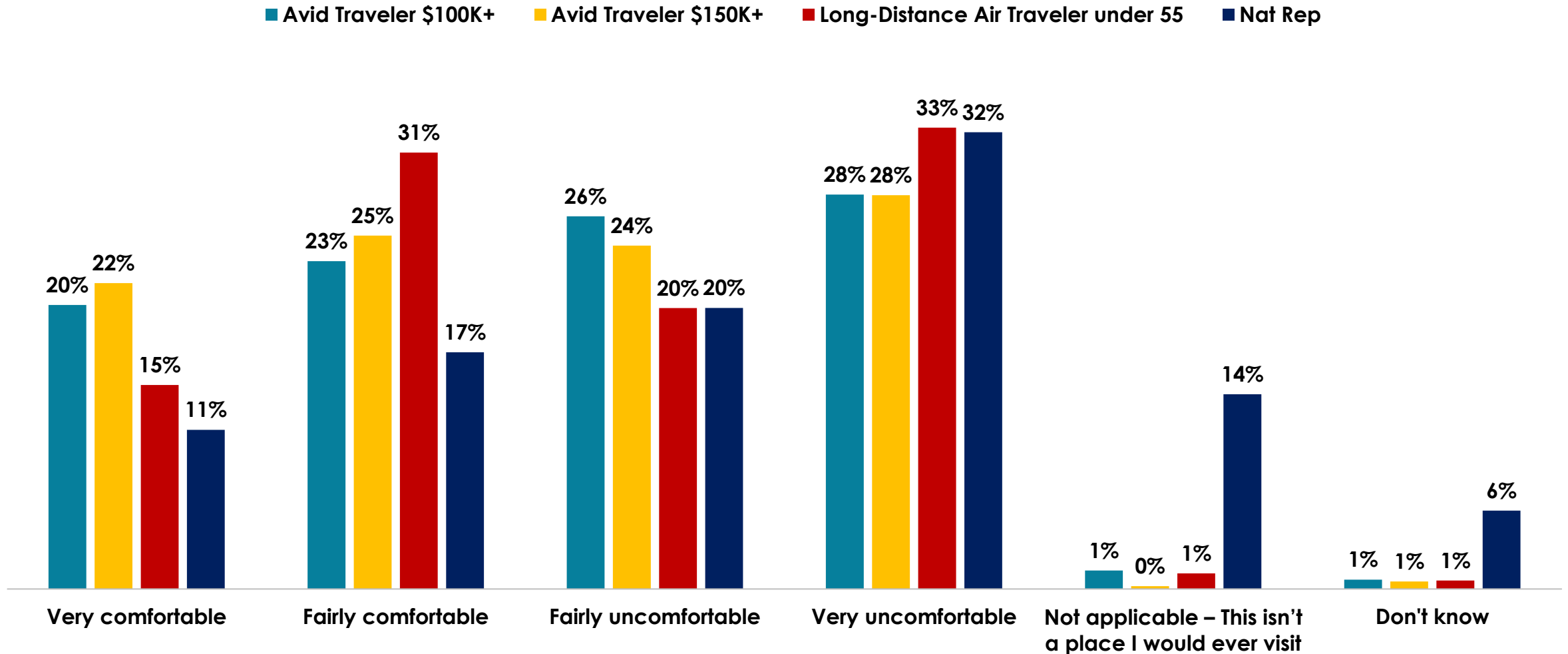
How has your household economic situation changed in the past month?

■ 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 June 13, 2021

Level of comfort visiting an airport right now

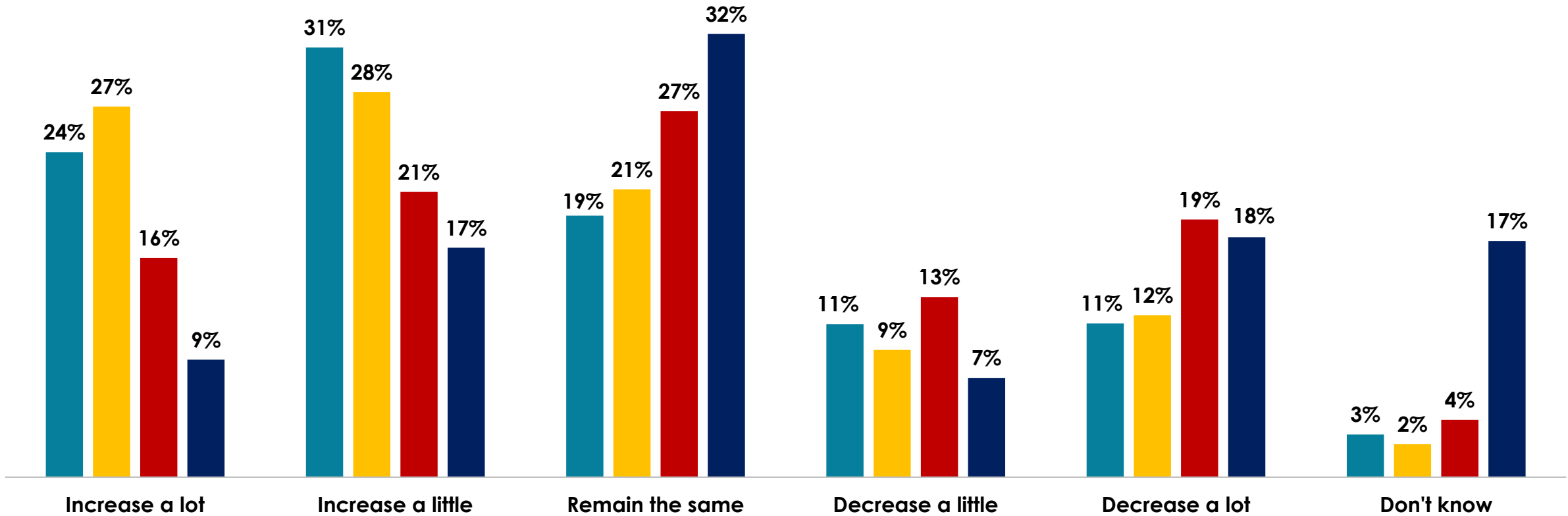




Future Travel Plans

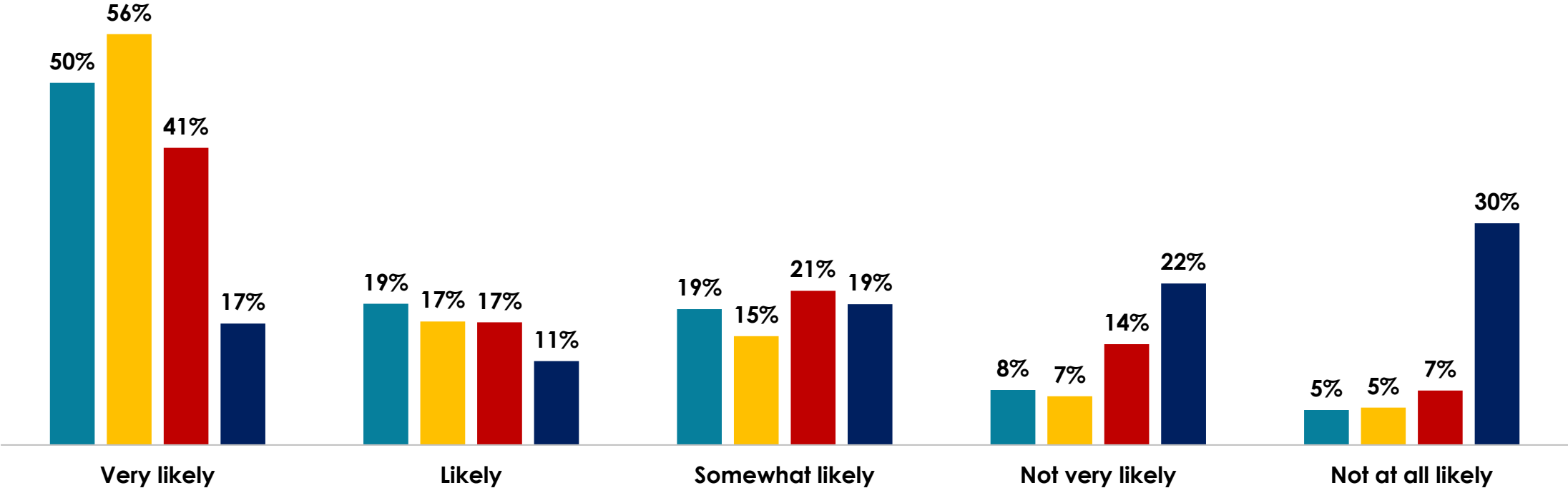
Future Travel – Expected change to air travel in the next 12 months

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



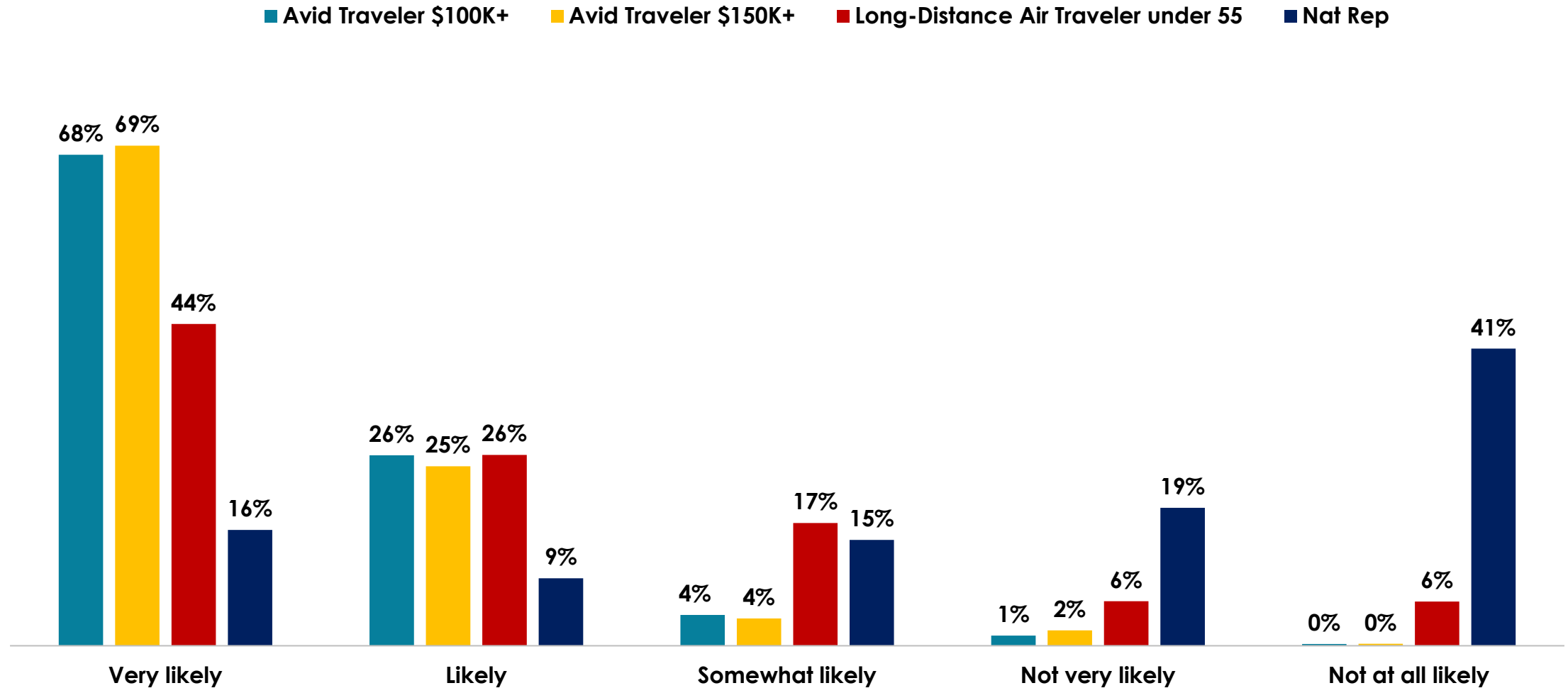
Future Travel – Likelihood of purchasing travel or leisure services in the next 12 months

■ 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



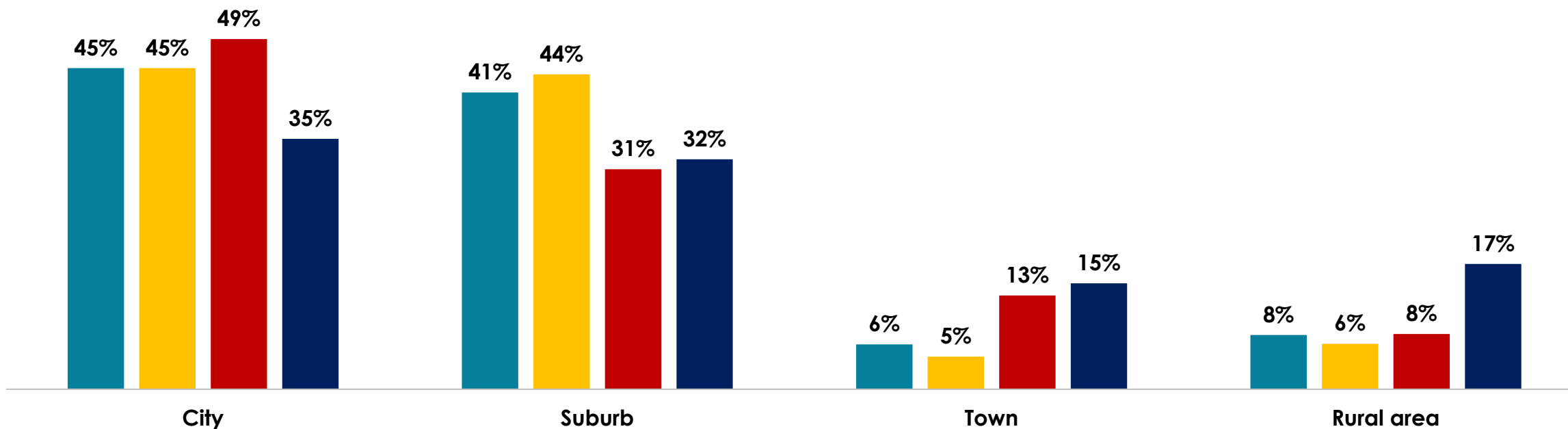


Traveler Profiles

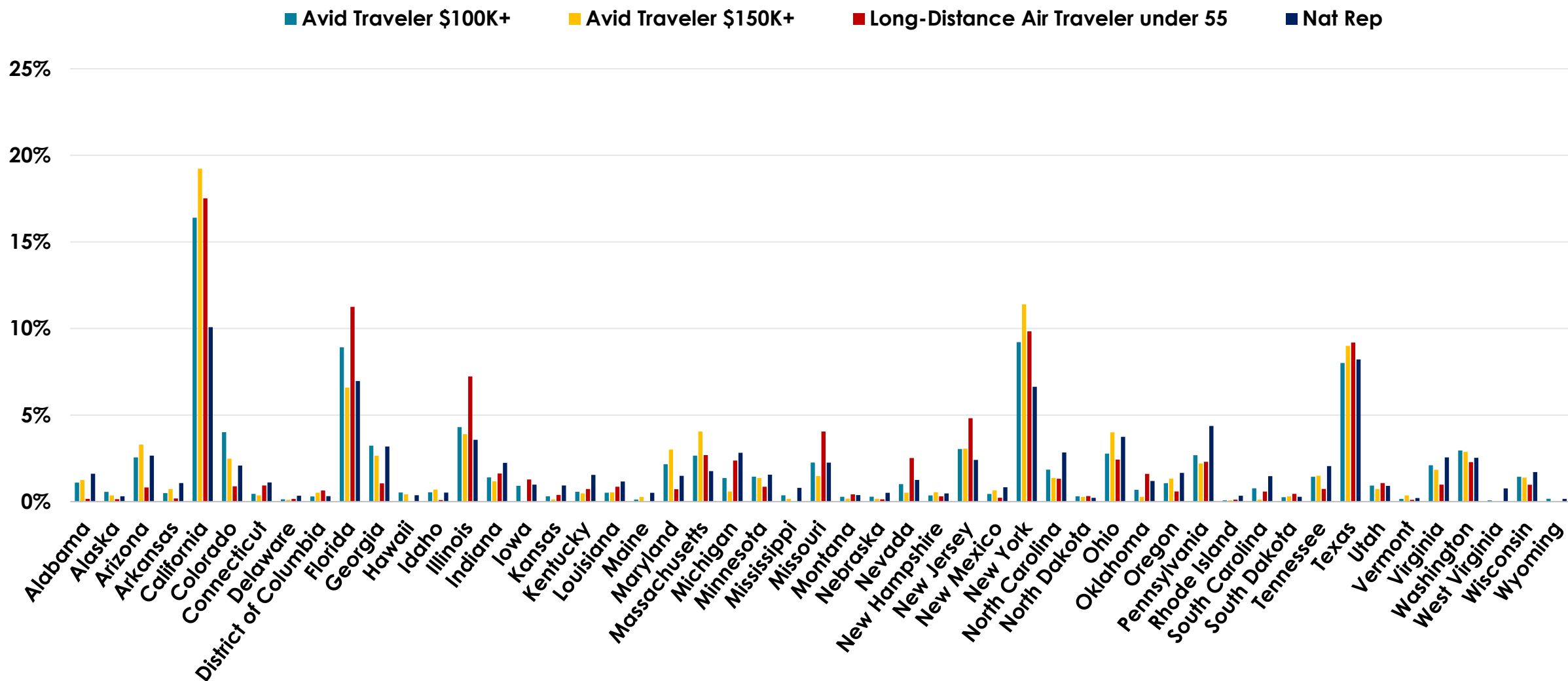
Avid Travelers vs. Long-Distance Air Travelers vs. Nat. Rep.

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 | 16.4% |
| New York | 9.2% |
| Florida | 8.9% |
| Texas | 8.0% |
| Illinois | 4.3% |
| Colorado | 4.0% |
| Georgia | 3.2% |
| New Jersey | 3.0% |
| Washington | 3.0% |
| Ohio | 2.8% |

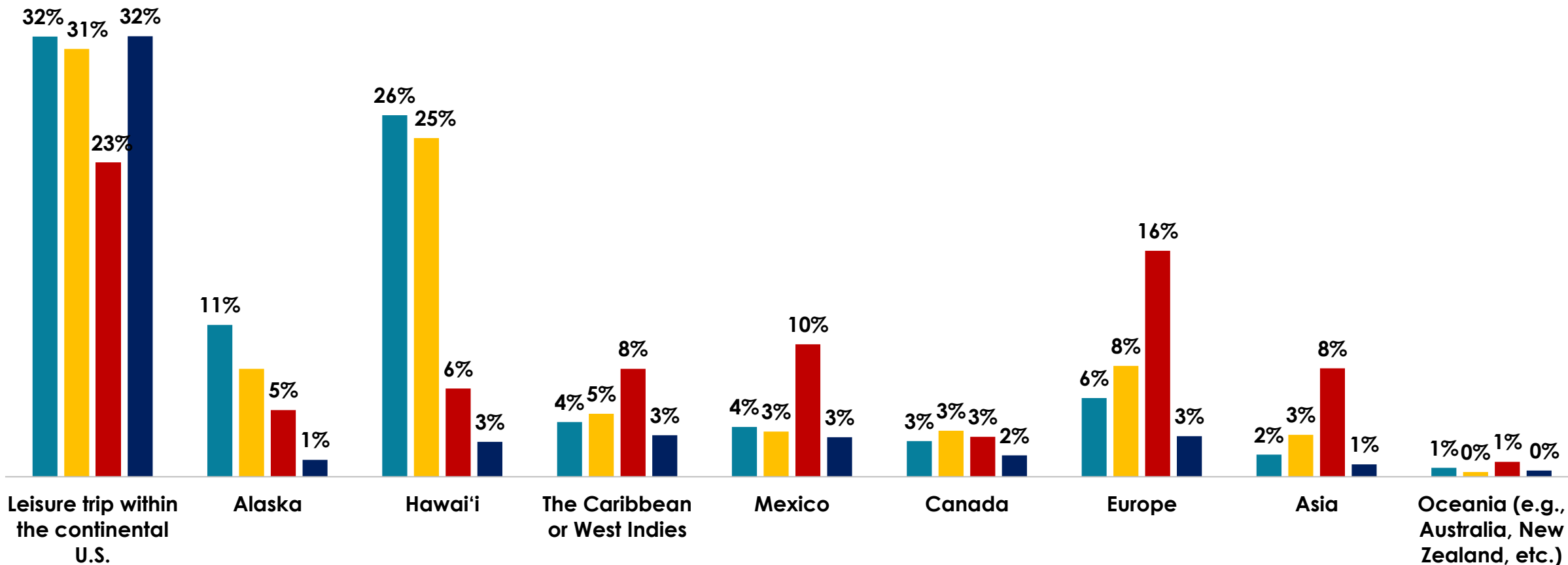
| Avid Traveler \$150K, 25-54, 2+ household | |
|--|-------|
| California | 19.2% |
| New York | 11.4% |
| Texas | 9.0% |
| Florida | 6.6% |
| Massachusetts | 4.0% |
| Ohio | 4.0% |
| Illinois | 3.9% |
| Arizona | 3.3% |
| New Jersey | 3.1% |
| Maryland | 3.0% |

| Long-Distance Air Travelers under 55 | |
|---|-------|
| California | 17.5% |
| Florida | 11.3% |
| New York | 9.8% |
| Texas | 9.2% |
| Illinois | 7.2% |
| New Jersey | 4.8% |
| Missouri | 4.1% |
| Massachusetts | 2.7% |
| Nevada | 2.5% |
| Ohio | 2.4% |

| Nat Rep | |
|----------------|-------|
| California | 10.1% |
| Texas | 8.2% |
| Florida | 7.0% |
| New York | 6.6% |
| Pennsylvania | 4.4% |
| Ohio | 3.7% |
| Illinois | 3.6% |
| Georgia | 3.2% |
| North Carolina | 2.8% |
| Michigan | 2.8% |

Leisure trip – most recent destination

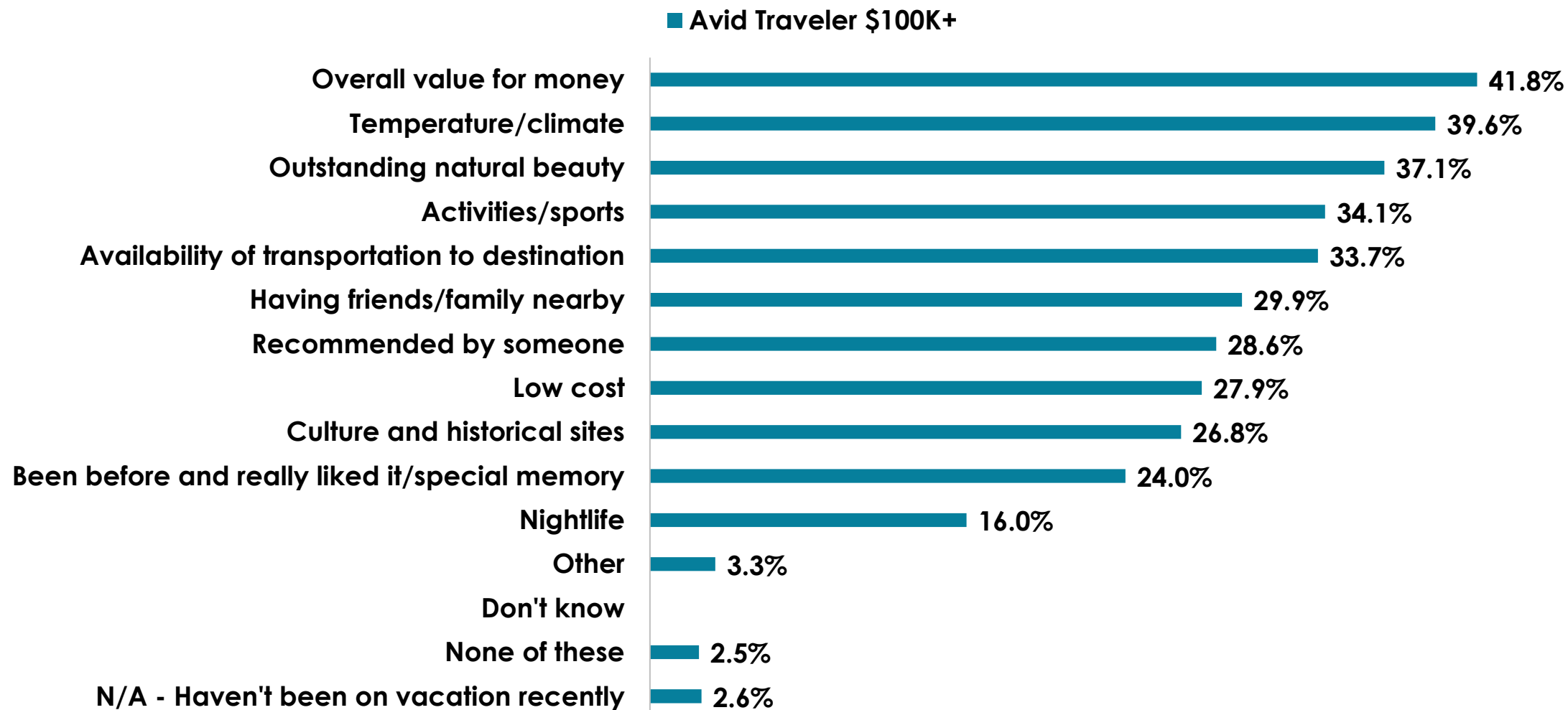
■ Avid Traveler \$100K+
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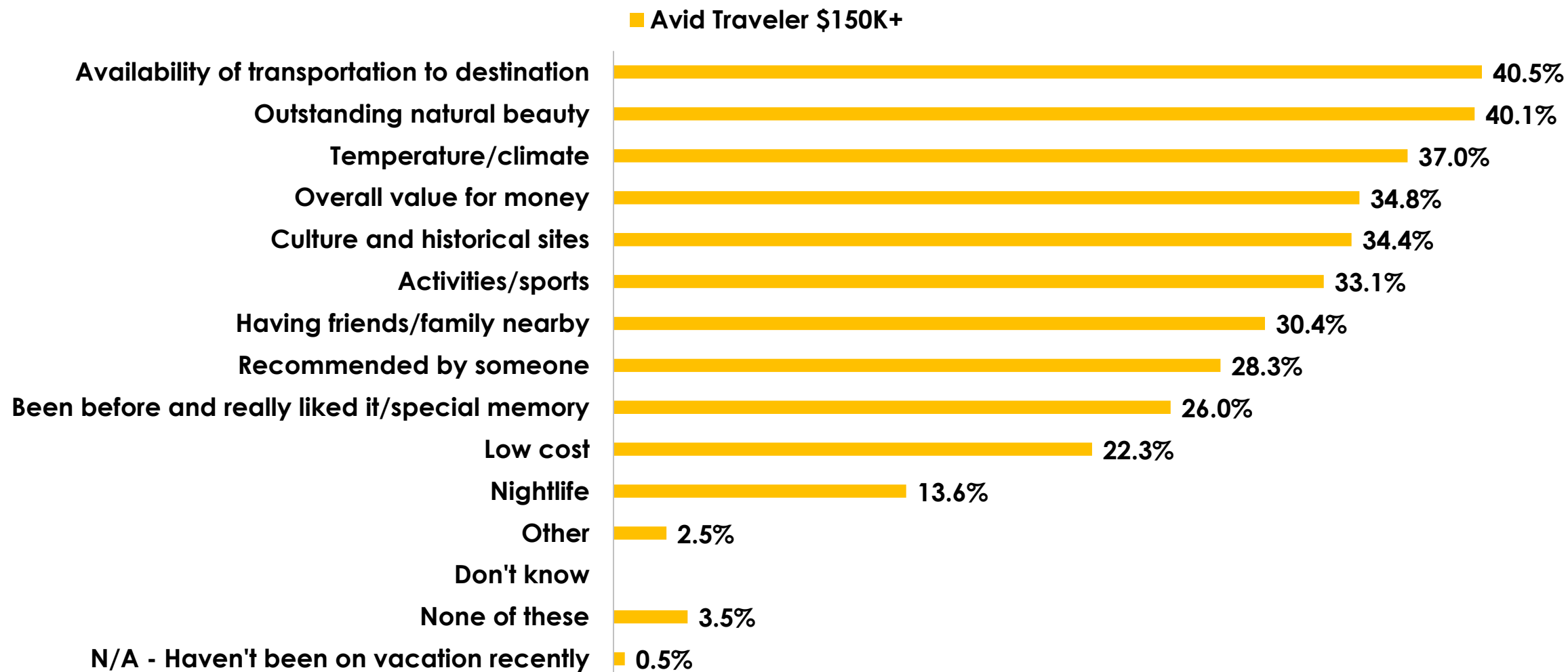
Reason for choosing most recent leisure destination

| Reasons | Avid Traveler \$100K, 25-54 individual | Avid Traveler \$150K, 25-54, 2+ household | Long-Distance Air Travelers under 55 | Nat Rep |
|--|--|---|---|---------|
| Overall value for money | 41.8% | 34.8% | 33.4% | 29.5% |
| Temperature/climate | 39.6% | 37.0% | 45.1% | 23.6% |
| Outstanding natural beauty | 37.1% | 40.1% | 22.5% | 23.7% |
| Activities/sports | 34.1% | 33.1% | 24.2% | 16.5% |
| Availability of transportation to destination | 33.7% | 40.5% | 30.8% | 14.8% |
| Having friends/family nearby | 29.9% | 30.4% | 30.7% | 22.8% |
| Recommended by someone | 28.6% | 28.3% | 19.1% | 13.5% |
| Low cost | 27.9% | 22.3% | 29.0% | 22.9% |
| Culture and historical sites | 26.8% | 34.4% | 27.6% | 18.4% |
| Been before and really liked it/special memory | 24.0% | 26.0% | 23.3% | 18.5% |
| Nightlife | 16.0% | 13.6% | 23.3% | 9.1% |
| Other | 3.3% | 2.5% | 1.1% | 5.8% |
| Don't know | 0.0% | 0.0% | 0.4% | 2.6% |
| None of these | 2.5% | 3.5% | 0.0% | 2.2% |
| N/A - Haven't been on vacation recently | 2.6% | 0.5% | 3.2% | 23.4% |

Reason for choosing most recent leisure destination

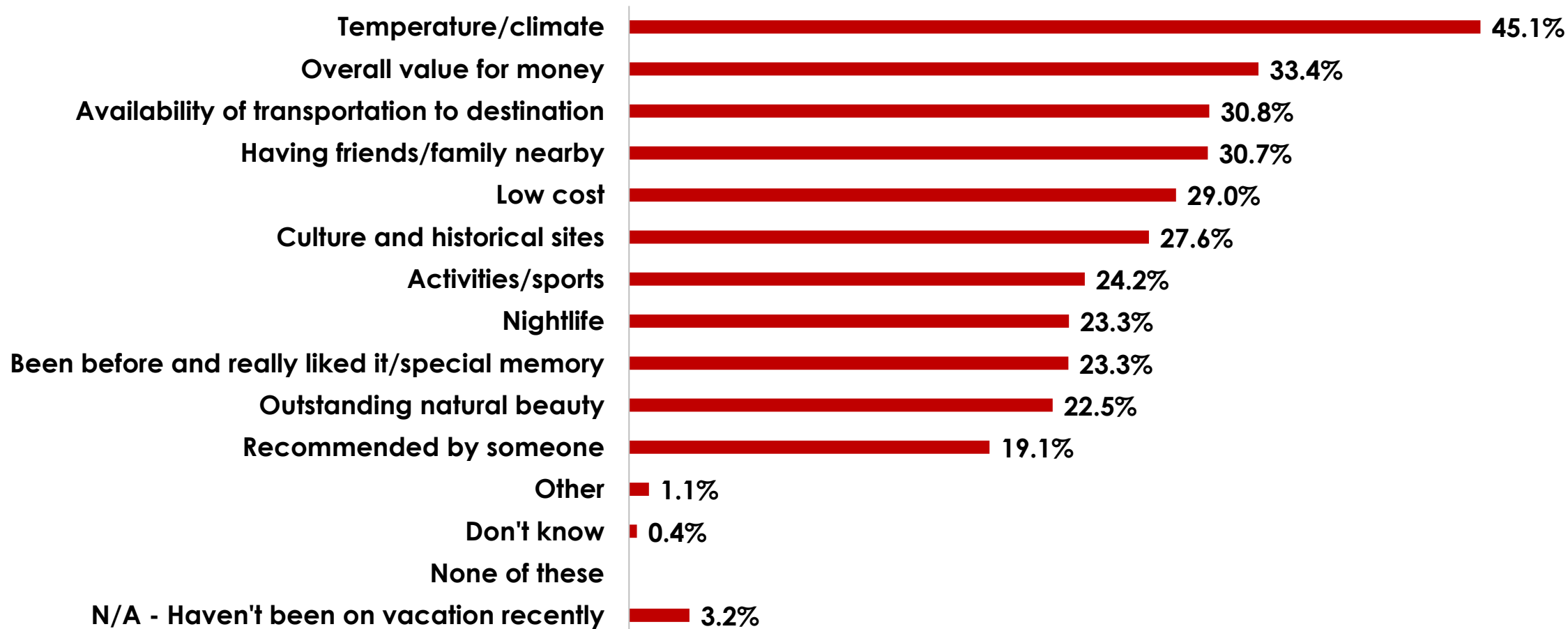


Reason for choosing most recent leisure destination

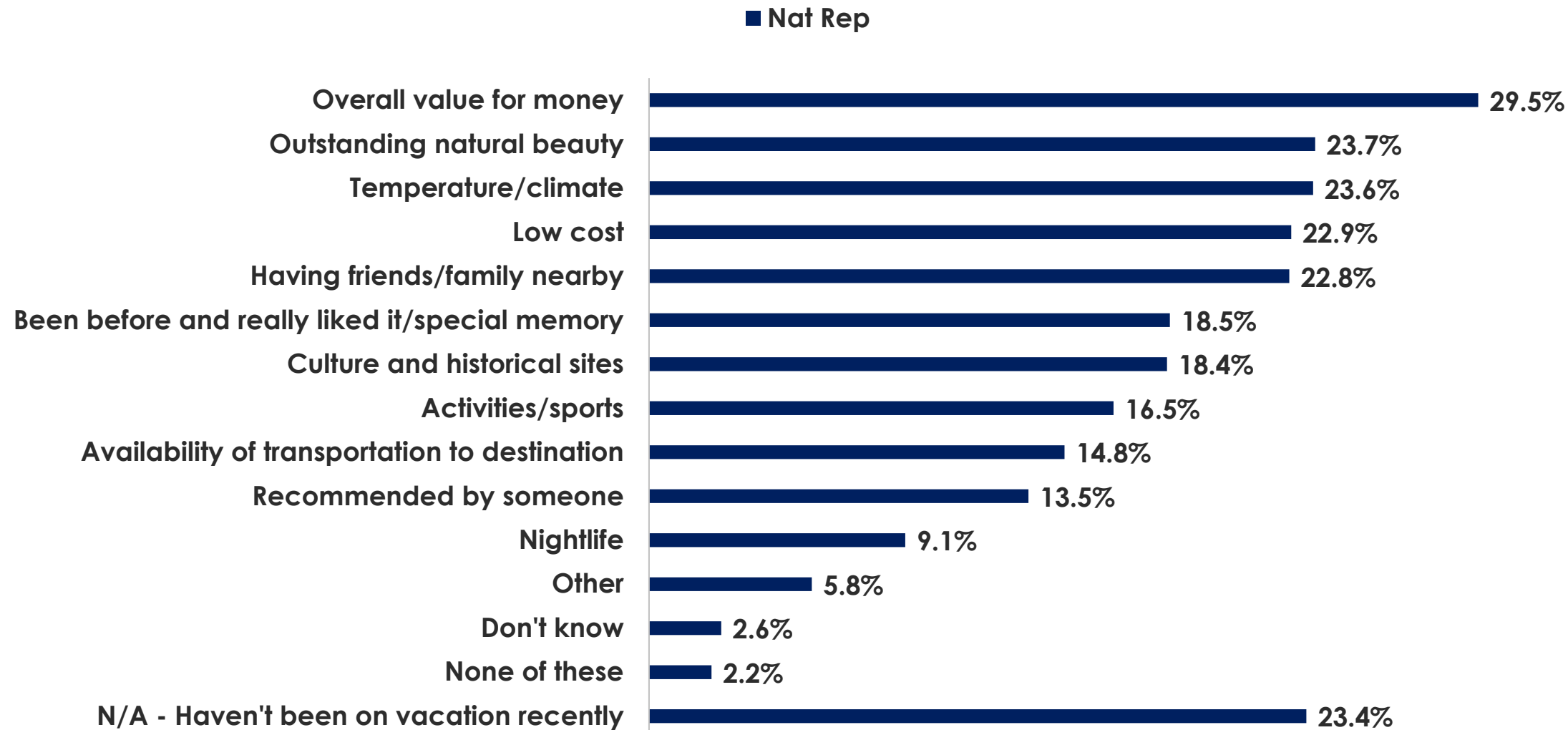


Reason for choosing most recent leisure destination

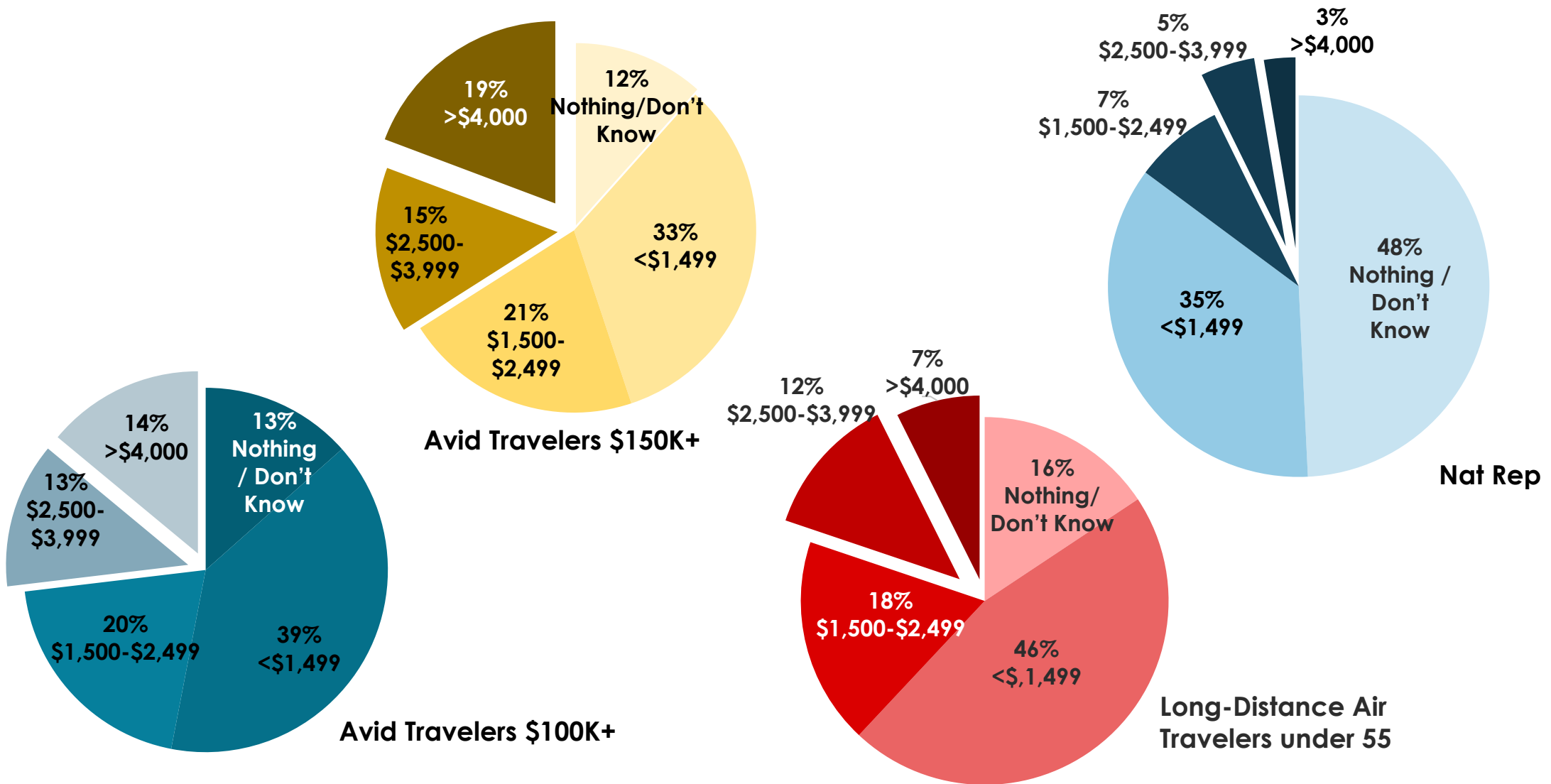
■ Long-Distance Air Traveler under 55



Reason for choosing most recent leisure destination



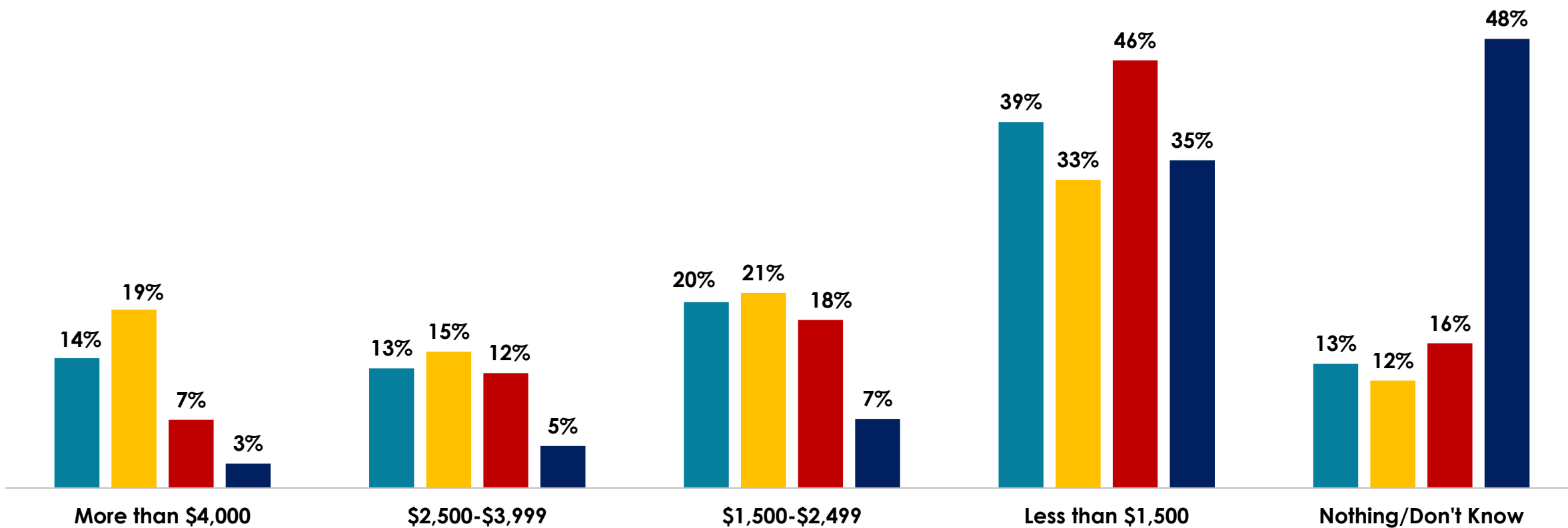
Most recent leisure trip - total spend



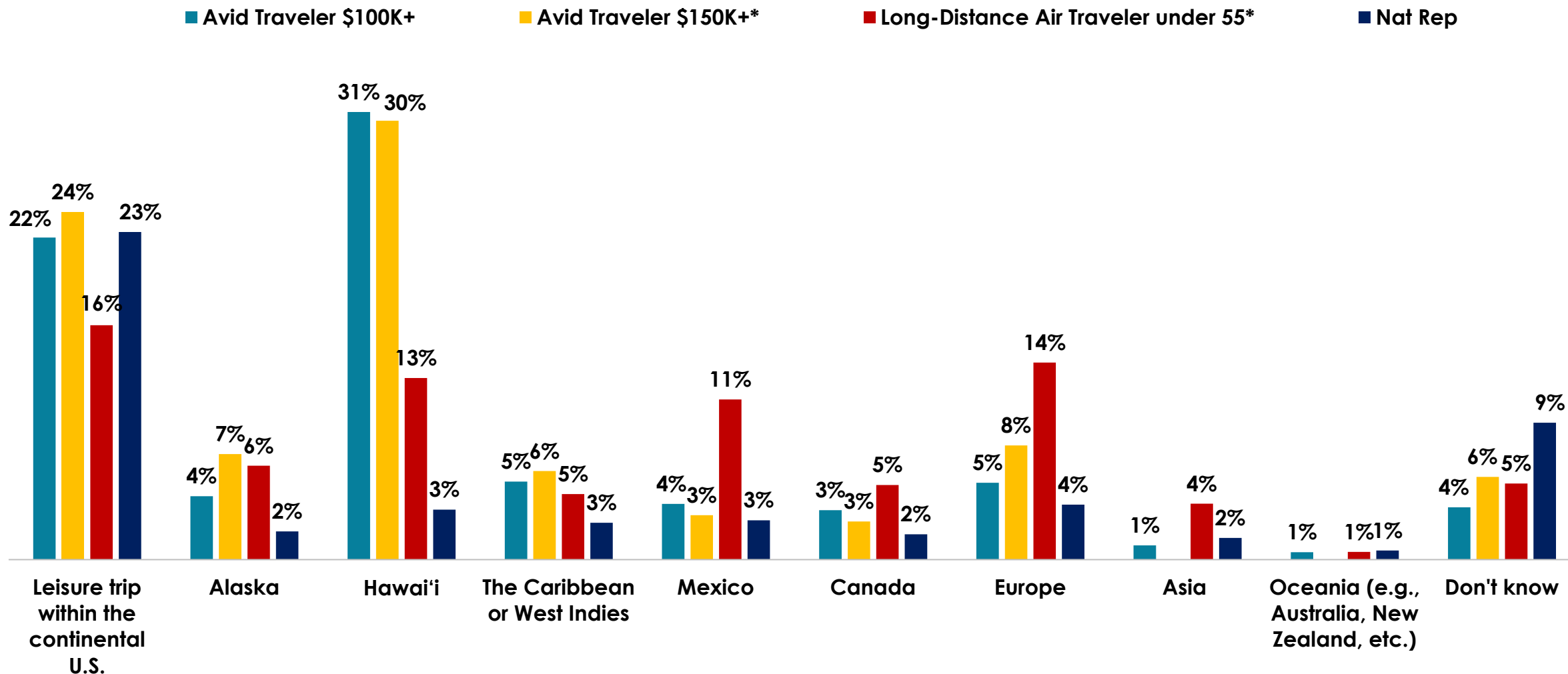
Based on Hawai'i Tourism Authority data, the average U.S. per person per trip spend for 2019 was \$1,693.32.

Most recent leisure trip - total spend

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



Leisure trip - next destination



*YouGov sample size <100

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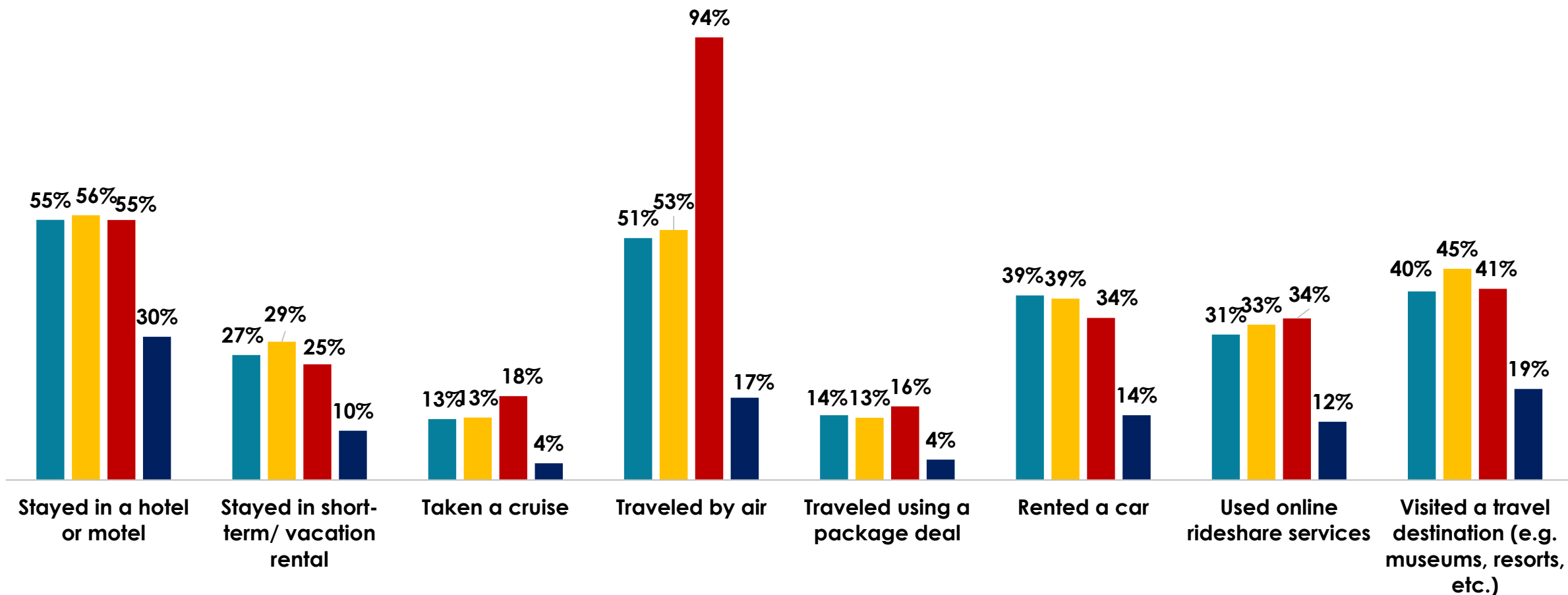
Leisure trip - activities in last 12 months

■ 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
 ■ Nat Rep



Booking & Spending Attitudes

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



Booking & Spending Attitudes

