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

- **It has worsened**
  - Avid Traveler $100K+: 21%
  - Avid Traveler $150K+: 61%
  - Long-Distance Air Traveler under 55: 25%
  - Nat Rep: 19%

- **There has been no change**
  - Avid Traveler $100K+: 19%
  - Avid Traveler $150K+: 64%
  - Long-Distance Air Traveler under 55: 59%
  - Nat Rep: 20%

- **It has improved**
  - Avid Traveler $100K+: 20%
  - Avid Traveler $150K+: 59%
  - Long-Distance Air Traveler under 55: 16%
  - Nat Rep: 17%

- **Don't know**
  - Avid Traveler $100K+: 21%
  - Avid Traveler $150K+: 16%
  - Long-Distance Air Traveler under 55: 14%
  - Nat Rep: 11%

Source: HVCB analysis of YouGov data provided by HTA as of April 11, 2021
Level of comfort visiting an airport right now

Source: HVCB analysis of YouGov data provided by HTA as of April 11, 2021
Future Travel Plans
Future Travel – Expected change to air travel in the next 12 months

Source: HVCB analysis of YouGov data provided by HTA as of April 11, 2021
Future Travel – Likelihood of purchasing travel or leisure services in the next 12 months

- Very likely:
  - Avid Traveler $100K+: 45%
  - Avid Traveler $150K+: 34%
  - Long-Distance Air Traveler under 55: 23%
  - Nat Rep: 15%

- Likely:
  - Avid Traveler $100K+: 19%
  - Avid Traveler $150K+: 17%
  - Long-Distance Air Traveler under 55: 20%
  - Nat Rep: 11%

- Somewhat likely:
  - Avid Traveler $100K+: 23%
  - Avid Traveler $150K+: 24%
  - Long-Distance Air Traveler under 55: 19%
  - Nat Rep: 19%

- Not very likely:
  - Avid Traveler $100K+: 7%
  - Avid Traveler $150K+: 6%
  - Long-Distance Air Traveler under 55: 14%
  - Nat Rep: 6%

- Not at all likely:
  - Avid Traveler $100K+: 14%
  - Avid Traveler $150K+: 8%
  - Long-Distance Air Traveler under 55: 5%
  - Nat Rep: 5%

Source: HVCB analysis of YouGov data provided by HTA as of April 11, 2021
Future Travel – Likelihood of booking a flight in the next 12 months

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

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

Source: HVCB analysis of YouGov data provided by HTA as of April 11, 2021
# Top 10 States of Residence by Segment

<table>
<thead>
<tr>
<th>Avid Traveler ($100K, 25-54, individual)</th>
<th>Avid Traveler ($150K, 25-54, 2+)</th>
<th>Long-Distance Air Traveler under 55</th>
<th>Nat Rep</th>
</tr>
</thead>
<tbody>
<tr>
<td>California 14.1%</td>
<td>California 16.1%</td>
<td>California 15.3%</td>
<td>California 10.0%</td>
</tr>
<tr>
<td>New York 9.0%</td>
<td>New York 12.5%</td>
<td>Florida 13.0%</td>
<td>Texas 8.0%</td>
</tr>
<tr>
<td>Texas 8.8%</td>
<td>Texas 8.3%</td>
<td>New York 11.1%</td>
<td>Florida 7.0%</td>
</tr>
<tr>
<td>Florida 7.1%</td>
<td>Florida 5.0%</td>
<td>Texas 8.7%</td>
<td>New York 6.5%</td>
</tr>
<tr>
<td>Washington 4.6%</td>
<td>Massachusetts 4.5%</td>
<td>Illinois 7.0%</td>
<td>Pennsylvania 4.5%</td>
</tr>
<tr>
<td>Colorado 4.3%</td>
<td>New Jersey 4.4%</td>
<td>New Jersey 4.2%</td>
<td>Ohio 3.8%</td>
</tr>
<tr>
<td>Illinois 4.3%</td>
<td>Washington 4.3%</td>
<td>Missouri 3.0%</td>
<td>Illinois 3.5%</td>
</tr>
<tr>
<td>New Jersey 3.8%</td>
<td>Arizona 4.0%</td>
<td>Pennsylvania 2.9%</td>
<td>Georgia 3.2%</td>
</tr>
<tr>
<td>Arizona 3.6%</td>
<td>Maryland 3.8%</td>
<td>Nevada 2.9%</td>
<td>North 2.9%</td>
</tr>
<tr>
<td>Georgia 2.7%</td>
<td>Ohio 3.1%</td>
<td>Ohio 2.8%</td>
<td>Michigan 2.8%</td>
</tr>
</tbody>
</table>

Source: HVCB analysis of YouGov data provided by HTA as of April 11, 2021
Leisure trip – most recent destination

Source: HVCB analysis of YouGov data provided by HTA as of April 11, 2021
## Reason for choosing most recent leisure destination

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

Source: HVCB analysis of YouGov data provided by HTA as of April 11, 2021
Reason for choosing most recent leisure destination

**Avid Traveler $100K+**

- Outstanding natural beauty: 39.7%
- Temperature/climate: 39.1%
- Overall value for money: 38.1%
- Activities/sports: 37.3%
- Culture and historical sites: 33.4%
- Having friends/family nearby: 32.8%
- Recommended by someone: 27.7%
- Been before and really liked it/special memory: 27.2%
- Availability of transportation to destination: 25.9%
- Low cost: 24.8%
- Nightlife: 16.9%
- Other: 6.0%
- Don’t know: 0.5%
- None of these: 1.0%
- N/A - Haven’t been on vacation recently: 4.1%

Source: HVCB analysis of YouGov data provided by HTA as of April 11, 2021
Reason for choosing most recent leisure destination

- Outstanding natural beauty: 41.1%
- Activities/sports: 37.1%
- Overall value for money: 36.4%
- Temperature/climate: 34.4%
- Been before and really liked it/special memory: 33.7%
- Availability of transportation to destination: 33.4%
- Recommended by someone: 31.5%
- Culture and historical sites: 31.5%
- Having friends/family nearby: 27.3%
- Low cost: 24.9%
- Nightlife: 17.5%
- Other: 6.1%
- Don’t know: 1.2%
- None of these: 1.5%
- N/A - Haven’t been on vacation recently: 5.4%

Source: HVCB analysis of YouGov data provided by HTA as of April 11, 2021
## Reason for choosing most recent leisure destination

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
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<tbody>
<tr>
<td>Overall value for money</td>
<td>40.1%</td>
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<tr>
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<tr>
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<tr>
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<tr>
<td>Low cost</td>
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<td>Availability of transportation to destination</td>
<td>28.3%</td>
</tr>
<tr>
<td>Been before and really liked it/special memory</td>
<td>23.7%</td>
</tr>
<tr>
<td>Activities/sports</td>
<td>21.9%</td>
</tr>
<tr>
<td>Recommended by someone</td>
<td>19.6%</td>
</tr>
<tr>
<td>Nightlife</td>
<td>12.7%</td>
</tr>
<tr>
<td>Other</td>
<td>4.9%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>2.1%</td>
</tr>
<tr>
<td>None of these</td>
<td>0.3%</td>
</tr>
<tr>
<td>N/A - Haven’t been on vacation recently</td>
<td>8.0%</td>
</tr>
</tbody>
</table>

Source: HVCB analysis of YouGov data provided by HTA as of April 11, 2021
# Reason for choosing most recent leisure destination

<table>
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<th>Reason</th>
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<tbody>
<tr>
<td><strong>Overall value for money</strong></td>
<td>29.3%</td>
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<tr>
<td><strong>Other</strong></td>
<td>5.7%</td>
</tr>
<tr>
<td><strong>Don't know</strong></td>
<td>2.6%</td>
</tr>
<tr>
<td><strong>None of these</strong></td>
<td>2.7%</td>
</tr>
<tr>
<td><strong>N/A - Haven't been on vacation recently</strong></td>
<td>24.1%</td>
</tr>
</tbody>
</table>

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

Source: HVCB analysis of YouGov data provided by HTA as of April 11, 2021
Most recent leisure trip - total spend

Source: HVCB analysis of YouGov data provided by HTA as of April 11, 2021
Leisure trip - next destination

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

*YouGov sample size <100

Leisure trip within the continental U.S.: 35%
Alaska: 23%
Hawai'i: 3%
The Caribbean or West Indies: 1%
Mexico: 3%
Canada: 3%
Europe: 3%
Asia: 3%
Oceania (e.g., Australia, New Zealand, etc.): 5%
Don't know: 10%

Source: HVCB analysis of YouGov data provided by HTA as of April 11, 2021
Leisure trip - activities in last 12 months

- Stayed in a hotel or motel: 58%, 63%, 59%
- Stayed in short-term/vacation rental: 29%, 35%, 30%
- Taken a cruise: 15%, 12%, 4%
- Traveled by air: 60%, 64%, 96%
- Traveled using a package deal: 64%, 48%, 17%
- Rented a car: 43%, 48%, 37%
- Used online rideshare services: 34%, 40%, 5%
- Visited a travel destination (e.g., museums, resorts, etc.): 43%, 49%, 45%

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

- I am passionate about traveling
- You can only ever get to know a country by experiencing its culture
- When I go on vacation, I like to go off the beaten track
- I like to come back from vacation having learnt something new

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

When I go on vacation I only want to eat, drink and lie in the sun

<table>
<thead>
<tr>
<th>Category</th>
<th>Avid Traveler $100K+</th>
<th>Avid Traveler $150K+</th>
<th>Long-Distance Air Traveler under 55</th>
<th>Nat Rep</th>
</tr>
</thead>
<tbody>
<tr>
<td>Relaxing</td>
<td>86%</td>
<td>86%</td>
<td>85%</td>
<td>83%</td>
</tr>
<tr>
<td>Activities</td>
<td>81%</td>
<td>77%</td>
<td>84%</td>
<td>75%</td>
</tr>
<tr>
<td>Vacation</td>
<td>54%</td>
<td>50%</td>
<td>40%</td>
<td>43%</td>
</tr>
</tbody>
</table>

Source: HVCB analysis of YouGov data provided by HTA as of April 11, 2021
When I’m planning my next vacation, I have at least one destination in mind or already selected

- Avid Traveler $100K+: 85%
- Avid Traveler $150K+: 82%
- Long-Distance Air Traveler under 55: 69%
- Nat Rep: 76%

I usually go back to the same places on vacation

- Avid Traveler $100K+: 56%
- Avid Traveler $150K+: 55%
- Long-Distance Air Traveler under 55: 46%
- Nat Rep: 48%

I tend to book my vacations outside of school vacations/breaks

- Avid Traveler $100K+: 62%
- Avid Traveler $150K+: 57%
- Long-Distance Air Traveler under 55: 39%
- Nat Rep: 38%

I usually wait for last minute deals rather than planning my vacations in advance

- Avid Traveler $100K+: 42%
- Avid Traveler $150K+: 36%
- Long-Distance Air Traveler under 55: 32%
- Nat Rep: 43%

Source: HVCB analysis of YouGov data provided by HTA as of April 11, 2021
Booking & Spending Attitudes

- I would never think of taking a package holiday/vacations
  - Avid Traveler $100K+: 42%
  - Avid Traveler $150K+: 36%
  - Nat Rep: 32%
  - Long-Distance Air Traveler under 55: 43%

- I try to keep to a strict budget when I go on vacation
  - Avid Traveler $100K+: 62%
  - Avid Traveler $150K+: 57%
  - Nat Rep: 58%
  - Long-Distance Air Traveler under 55: 57%

- I am excited to generally spend more when traveling
  - Avid Traveler $100K+: 56%
  - Avid Traveler $150K+: 55%
  - Nat Rep: 48%
  - Long-Distance Air Traveler under 55: 46%

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