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

- Very comfortable
  - Avid Traveler $100K+: 20%
  - Avid Traveler $150K+: 22%
  - Long-Distance Air Traveler under 55: 25%
  - Nat Rep: 15%

- Fairly comfortable
  - Avid Traveler $100K+: 17%
  - Avid Traveler $150K+: 23%
  - Long-Distance Air Traveler under 55: 31%
  - Nat Rep: 11%

- Fairly uncomfortable
  - Avid Traveler $100K+: 20%
  - Avid Traveler $150K+: 24%
  - Long-Distance Air Traveler under 55: 26%
  - Nat Rep: 20%

- Very uncomfortable
  - Avid Traveler $100K+: 28%
  - Avid Traveler $150K+: 28%
  - Long-Distance Air Traveler under 55: 33%
  - Nat Rep: 32%

- Not applicable – This isn’t a place I would ever visit
  - Nat Rep: 14%

- Don’t know
  - Nat Rep: 6%

Source: HVCB analysis of YouGov data provided by HTA as of June 13, 2021
Future Travel Plans
<table>
<thead>
<tr>
<th>Change Amount</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>Increase a lot</td>
<td>24%</td>
<td>28%</td>
<td>19%</td>
<td>17%</td>
</tr>
<tr>
<td>Increase a little</td>
<td>27%</td>
<td>31%</td>
<td>27%</td>
<td>19%</td>
</tr>
<tr>
<td>Remain the same</td>
<td>16%</td>
<td>21%</td>
<td>21%</td>
<td>17%</td>
</tr>
<tr>
<td>Decrease a little</td>
<td>17%</td>
<td>19%</td>
<td>19%</td>
<td>11%</td>
</tr>
<tr>
<td>Decrease a lot</td>
<td>9%</td>
<td>7%</td>
<td>13%</td>
<td>18%</td>
</tr>
<tr>
<td>Don't know</td>
<td>17%</td>
<td>11%</td>
<td>18%</td>
<td>3%</td>
</tr>
</tbody>
</table>

Source: HVCB analysis of YouGov data provided by HTA as of June 13, 2021
Future Travel – Likelihood of purchasing travel or leisure services in the next 12 months

Source: HVCB analysis of YouGov data provided by HTA as of June 13, 2021
Future Travel – Likelihood of booking a flight in the next 12 months

- Very likely:
  - Avid Traveler $100K+: 68%
  - Avid Traveler $150K+: 44%
  - Long-Distance Air Traveler under 55: 16%

- Likely:
  - Avid Traveler $100K+: 26%
  - Avid Traveler $150K+: 25%
  - Long-Distance Air Traveler under 55: 26%
  - Nat Rep: 9%

- Somewhat likely:
  - Avid Traveler $100K+: 17%
  - Avid Traveler $150K+: 4%
  - Long-Distance Air Traveler under 55: 4%
  - Nat Rep: 15%

- Not very likely:
  - Avid Traveler $100K+: 1%
  - Avid Traveler $150K+: 2%
  - Long-Distance Air Traveler under 55: 6%
  - Nat Rep: 6%

- Not at all likely:
  - Avid Traveler $100K+: 0%
  - Avid Traveler $150K+: 0%
  - Long-Distance Air Traveler under 55: 0%
  - Nat Rep: 6%

Source: HVCB analysis of YouGov data provided by HTA as of June 13, 2021
Traveler Profiles
Avid Travelers vs. Long-Distance Air Travelers vs. Nat. Rep.
Type of Area Living In

Source: HVCB analysis of YouGov data provided by HTA as of June 13, 2021
State of Residence

Source: HVCB analysis of YouGov data provided by HTA as of June 13, 2021
# 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%

*Source: HVCB analysis of YouGov data provided by HTA as of June 13, 2021*
Leisure trip – most recent destination

Source: HVCB analysis of YouGov data provided by HTA as of June 13, 2021
<table>
<thead>
<tr>
<th>Reasons</th>
<th>Avid Traveler $100K, 25-54 individual</th>
<th>Avid Traveler $150K, 25-54, 2+ household</th>
<th>Long-Distance Air Travelers under 55</th>
<th>Nat Rep</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall value for money</td>
<td>41.8%</td>
<td>34.8%</td>
<td>33.4%</td>
<td>29.5%</td>
</tr>
<tr>
<td>Temperature/climate</td>
<td>39.6%</td>
<td>37.0%</td>
<td>45.1%</td>
<td>23.6%</td>
</tr>
<tr>
<td>Outstanding natural beauty</td>
<td>37.1%</td>
<td>40.1%</td>
<td>22.5%</td>
<td>23.7%</td>
</tr>
<tr>
<td>Activities/sports</td>
<td>34.1%</td>
<td>33.1%</td>
<td>24.2%</td>
<td>16.5%</td>
</tr>
<tr>
<td>Availability of transportation to destination</td>
<td>33.7%</td>
<td>40.5%</td>
<td>30.8%</td>
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</tr>
<tr>
<td>Having friends/family nearby</td>
<td>29.9%</td>
<td>30.4%</td>
<td>30.7%</td>
<td>22.8%</td>
</tr>
<tr>
<td>Recommended by someone</td>
<td>28.6%</td>
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<td>19.1%</td>
<td>13.5%</td>
</tr>
<tr>
<td>Low cost</td>
<td>27.9%</td>
<td>22.3%</td>
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<tr>
<td>Culture and historical sites</td>
<td>26.8%</td>
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<tr>
<td>Been before and really liked it/special memory</td>
<td>24.0%</td>
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<td>16.0%</td>
<td>13.6%</td>
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<tr>
<td>Other</td>
<td>3.3%</td>
<td>2.5%</td>
<td>1.1%</td>
<td>5.8%</td>
</tr>
<tr>
<td>Don't know</td>
<td>0.0%</td>
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<td>2.6%</td>
</tr>
<tr>
<td>None of these</td>
<td>2.5%</td>
<td>3.5%</td>
<td>0.0%</td>
<td>2.2%</td>
</tr>
<tr>
<td>N/A - Haven't been on vacation recently</td>
<td>2.6%</td>
<td>0.5%</td>
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</tr>
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Reason for choosing most recent leisure destination

Source: HVCB analysis of YouGov data provided by HTA as of June 13, 2021
### Reason for choosing most recent leisure destination

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<tr>
<th>Reason</th>
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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

Source: HVCB analysis of YouGov data provided by HTA as of June 13, 2021
Leisure trip - next destination

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

Leisure trip within the continental U.S.: 24% 16% 23%
Alaska: 7% 6% 4% 2%
Hawai‘i: 13% 31% 30%
The Caribbean or West Indies: 5% 6% 5% 3%
Mexico: 4% 3% 3% 2%
Canada: 3% 3% 5% 2%
Europe: 8% 14%
Asia: 4% 2%
Oceania (e.g., Australia, New Zealand, etc.): 4% 6% 5%
Don't know: 9%

*YouGov sample size <100

Source: HVCB analysis of YouGov data provided by HTA as of June 13, 2021
Leisure trip - activities in last 12 months

Source: HVCB analysis of YouGov data provided by HTA as of June 13, 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

Source: HVCB analysis of YouGov data provided by HTA as of June 13, 2021
Travel Activities

- **I like to spend my leisure time relaxing**
  - Avid Traveler $100K+: 82%
  - Avid Traveler $150K+: 80%
  - Long-Distance Air Traveler under 55: 81%
  - Nat Rep: 83%

- **I tend to spend my leisure time on hobbies and activities**
  - Avid Traveler $100K+: 78%
  - Avid Traveler $150K+: 75%
  - Long-Distance Air Traveler under 55: 80%
  - Nat Rep: 75%

- **When I go on vacation I only want to eat, drink and lie in the sun**
  - Avid Traveler $100K+: 55%
  - Avid Traveler $150K+: 56%
  - Long-Distance Air Traveler under 55: 46%
  - Nat Rep: 45%

Source: HVCB analysis of YouGov data provided by HTA as of June 13, 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+ 84%
- Long-Distance Air Traveler under 55 77%
- Nat Rep 70%

I usually go back to the same places on vacation

- Avid Traveler $100K+ 55%
- Avid Traveler $150K+ 56%
- Long-Distance Air Traveler under 55 56%
- Nat Rep 49%

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

- Avid Traveler $100K+ 58%
- Avid Traveler $150K+ 55%
- Long-Distance Air Traveler under 55 64%
- Nat Rep 40%

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

- Avid Traveler $100K+ 39%
- Avid Traveler $150K+ 48%
- Long-Distance Air Traveler under 55 41%
- Nat Rep 34%

Source: HVCB analysis of YouGov data provided by HTA as of June 13, 2021
Booking & Spending Attitudes

I would never think of taking a package holiday/vacations
- Avid Traveler $100K+: 40%
- Avid Traveler $150K+: 40%
- Long-Distance Air Traveler under 55: 34%
- Nat Rep: 43%

I try to keep to a strict budget when I go on vacation
- Avid Traveler $100K+: 45%
- Avid Traveler $150K+: 41%
- Long-Distance Air Traveler under 55: 50%
- Nat Rep: 54%

I am excited to generally spend more when traveling
- Avid Traveler $100K+: 63%
- Avid Traveler $150K+: 61%
- Long-Distance Air Traveler under 55: 61%
- Nat Rep: 48%

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