COVID-19 Impact on U.S. Avid Travelers

An HVCB analysis of YouGov data provided by HTA as of July 11, 2021
Reported on July 22, 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: 22%, 20%, 18%, 23%
- There has been no change: 61%, 64%, 61%, 59%
- It has improved: 16%, 15%, 19%, 12%
- Don’t know: 1%, 2%, 7%

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

Very comfortable
- Avid Traveler $100K+: 11%
- Avid Traveler $150K+: 21%
- Long-Distance Air Traveler under 55: 20%
- Nat Rep: 28%
- Not applicable – This isn’t a place I would ever visit: 2%
- Don’t know: 5%

Fairly comfortable
- Avid Traveler $100K+: 28%
- Avid Traveler $150K+: 24%
- Long-Distance Air Traveler under 55: 17%
- Nat Rep: 28%
- Not applicable – This isn’t a place I would ever visit: 0%
- Don’t know: 2%

Fairly uncomfortable
- Avid Traveler $100K+: 13%
- Avid Traveler $150K+: 28%
- Long-Distance Air Traveler under 55: 25%
- Nat Rep: 30%
- Not applicable – This isn’t a place I would ever visit: 2%
- Don’t know: 1%

Very uncomfortable
- Avid Traveler $100K+: 21%
- Avid Traveler $150K+: 25%
- Long-Distance Air Traveler under 55: 28%
- Nat Rep: 32%
- Not applicable – This isn’t a place I would ever visit: 14%
- Don’t know: 1%

Don’t know
- Avid Traveler $100K+: 13%
- Avid Traveler $150K+: 24%
- Long-Distance Air Traveler under 55: 25%
- Nat Rep: 28%
- Not applicable – This isn’t a place I would ever visit: 2%
- Don’t know: 5%

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

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

Future Travel – Likelihood of booking a flight in the next 12 months

- Very likely
  - Avid Traveler $100K+: 67%
  - Avid Traveler $150K+: 70%
  - Long-Distance Air Traveler under 55: 47%
  - Nat Rep: 16%

- Likely
  - Avid Traveler $100K+: 28%
  - Avid Traveler $150K+: 24%
  - Long-Distance Air Traveler under 55: 26%
  - Nat Rep: 10%

- Somewhat likely
  - Avid Traveler $100K+: 16%
  - Avid Traveler $150K+: 15%
  - Long-Distance Air Traveler under 55: 4%
  - Nat Rep: 4%

- Not very likely
  - Avid Traveler $100K+: 19%
  - Avid Traveler $150K+: 4%
  - Long-Distance Air Traveler under 55: 7%
  - Nat Rep: 0%

- Not at all likely
  - Avid Traveler $100K+: 19%
  - Avid Traveler $150K+: 4%
  - Long-Distance Air Traveler under 55: 7%
  - Nat Rep: 0%

Source: HVCB analysis of YouGov data provided by HTA as of July 11, 2021
Traveler Profiles
Avid Travelers vs. Long-Distance Air Travelers vs. Nat. Rep.
Type of Area Living In

<table>
<thead>
<tr>
<th></th>
<th>City</th>
<th>Suburb</th>
<th>Town</th>
<th>Rural area</th>
</tr>
</thead>
<tbody>
<tr>
<td>Avid Traveler $100K+</td>
<td>47%</td>
<td>39%</td>
<td>6%</td>
<td>8%</td>
</tr>
<tr>
<td>Avid Traveler $150K+</td>
<td>49%</td>
<td>39%</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>Long-Distance Air Traveler under 55</td>
<td>50%</td>
<td>30%</td>
<td>15%</td>
<td>10%</td>
</tr>
<tr>
<td>Nat Rep</td>
<td>50%</td>
<td>32%</td>
<td>15%</td>
<td>17%</td>
</tr>
</tbody>
</table>

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

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

<table>
<thead>
<tr>
<th>Segment Type</th>
<th>States</th>
<th>Percentages</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Avid Traveler</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>$100K, 25-54, individual</td>
<td>California</td>
<td>18.2%</td>
</tr>
<tr>
<td></td>
<td>New York</td>
<td>9.6%</td>
</tr>
<tr>
<td></td>
<td>Florida</td>
<td>7.9%</td>
</tr>
<tr>
<td></td>
<td>Texas</td>
<td>7.6%</td>
</tr>
<tr>
<td></td>
<td>Illinois</td>
<td>4.3%</td>
</tr>
<tr>
<td></td>
<td>Colorado</td>
<td>3.3%</td>
</tr>
<tr>
<td></td>
<td>Washington</td>
<td>3.1%</td>
</tr>
<tr>
<td></td>
<td>Georgia</td>
<td>3.0%</td>
</tr>
<tr>
<td></td>
<td>Arizona</td>
<td>3.0%</td>
</tr>
<tr>
<td></td>
<td>Ohio</td>
<td>3.0%</td>
</tr>
<tr>
<td>$150K, 25-54, 2+ household</td>
<td>California</td>
<td>21.7%</td>
</tr>
<tr>
<td></td>
<td>New York</td>
<td>12.1%</td>
</tr>
<tr>
<td></td>
<td>Texas</td>
<td>7.1%</td>
</tr>
<tr>
<td></td>
<td>Florida</td>
<td>6.1%</td>
</tr>
<tr>
<td></td>
<td>Illinois</td>
<td>4.4%</td>
</tr>
<tr>
<td></td>
<td>Massachusetts</td>
<td>3.6%</td>
</tr>
<tr>
<td></td>
<td>Washington</td>
<td>3.5%</td>
</tr>
<tr>
<td></td>
<td>Ohio</td>
<td>3.4%</td>
</tr>
<tr>
<td></td>
<td>Maryland</td>
<td>3.3%</td>
</tr>
<tr>
<td></td>
<td>Arizona</td>
<td>3.2%</td>
</tr>
<tr>
<td><strong>Long-Distance Air Traveler under 55</strong></td>
<td>California</td>
<td>18.7%</td>
</tr>
<tr>
<td></td>
<td>Texas</td>
<td>10.6%</td>
</tr>
<tr>
<td></td>
<td>New York</td>
<td>10.2%</td>
</tr>
<tr>
<td></td>
<td>Florida</td>
<td>9.5%</td>
</tr>
<tr>
<td></td>
<td>New Jersey</td>
<td>6.1%</td>
</tr>
<tr>
<td></td>
<td>Illinois</td>
<td>5.5%</td>
</tr>
<tr>
<td></td>
<td>Nevada</td>
<td>3.5%</td>
</tr>
<tr>
<td></td>
<td>Washington</td>
<td>2.9%</td>
</tr>
<tr>
<td></td>
<td>Pennsylvania</td>
<td>2.4%</td>
</tr>
<tr>
<td></td>
<td>Missouri</td>
<td>2.4%</td>
</tr>
<tr>
<td><strong>Nat Rep</strong></td>
<td>California</td>
<td>10.4%</td>
</tr>
<tr>
<td></td>
<td>Texas</td>
<td>8.2%</td>
</tr>
<tr>
<td></td>
<td>Florida</td>
<td>6.9%</td>
</tr>
<tr>
<td></td>
<td>New York</td>
<td>6.6%</td>
</tr>
<tr>
<td></td>
<td>Pennsylvania</td>
<td>4.4%</td>
</tr>
<tr>
<td></td>
<td>Ohio</td>
<td>3.7%</td>
</tr>
<tr>
<td></td>
<td>Illinois</td>
<td>3.6%</td>
</tr>
<tr>
<td></td>
<td>Georgia</td>
<td>3.2%</td>
</tr>
<tr>
<td></td>
<td>North Carolina</td>
<td>2.8%</td>
</tr>
<tr>
<td></td>
<td>Michigan</td>
<td>2.8%</td>
</tr>
</tbody>
</table>

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

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

<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 Traveler under 55</th>
<th>Nat Rep</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall value for money</td>
<td>40.3%</td>
<td>34.8%</td>
<td>29.8%</td>
<td>30.3%</td>
</tr>
<tr>
<td>Temperature/climate</td>
<td>38.9%</td>
<td>38.4%</td>
<td>43.6%</td>
<td>24.1%</td>
</tr>
<tr>
<td>Outstanding natural beauty</td>
<td>37.0%</td>
<td>35.6%</td>
<td>23.7%</td>
<td>24.2%</td>
</tr>
<tr>
<td>Availability of transportation to destination</td>
<td>34.9%</td>
<td>39.1%</td>
<td>28.4%</td>
<td>14.8%</td>
</tr>
<tr>
<td>Activities/sports</td>
<td>34.2%</td>
<td>32.1%</td>
<td>29.0%</td>
<td>16.5%</td>
</tr>
<tr>
<td>Having friends/family in/nearby</td>
<td>30.1%</td>
<td>31.7%</td>
<td>29.9%</td>
<td>23.4%</td>
</tr>
<tr>
<td>Recommended by someone</td>
<td>27.7%</td>
<td>30.9%</td>
<td>18.2%</td>
<td>13.2%</td>
</tr>
<tr>
<td>Culture and historical sites</td>
<td>27.1%</td>
<td>37.7%</td>
<td>28.5%</td>
<td>18.6%</td>
</tr>
<tr>
<td>Been before and really liked it/special memory</td>
<td>25.2%</td>
<td>24.4%</td>
<td>20.8%</td>
<td>18.6%</td>
</tr>
<tr>
<td>Low cost</td>
<td>22.7%</td>
<td>20.5%</td>
<td>24.1%</td>
<td>23.0%</td>
</tr>
<tr>
<td>Nightlife</td>
<td>15.5%</td>
<td>14.0%</td>
<td>26.3%</td>
<td>8.6%</td>
</tr>
<tr>
<td>Other</td>
<td>4.8%</td>
<td>3.6%</td>
<td>1.3%</td>
<td>5.8%</td>
</tr>
<tr>
<td>Don't know</td>
<td>0.2%</td>
<td>0.0%</td>
<td>0.4%</td>
<td>2.4%</td>
</tr>
<tr>
<td>None of these</td>
<td>2.0%</td>
<td>2.3%</td>
<td>0.7%</td>
<td>2.3%</td>
</tr>
<tr>
<td>N/A - Haven't been on vacation recently</td>
<td>3.1%</td>
<td>1.4%</td>
<td>5.1%</td>
<td>23.7%</td>
</tr>
</tbody>
</table>

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

- **Overall value for money**: 40.3%
- **Temperature/climate**: 38.9%
- **Outstanding natural beauty**: 37.0%
- **Availability of transportation to destination**: 34.9%
- **Activities/sports**: 34.2%
- **Having friends/family in/nearby**: 30.1%
- **Recommended by someone**: 27.7%
- **Culture and historical sites**: 27.1%
- **Been before and really liked it/special memory**: 25.2%
- **Low cost**: 22.7%
- **Nightlife**: 15.5%
- **Other**: 4.8%
- **Don't know**: 2.0%
- **None of these**: 3.1%
- **N/A - Haven't been on vacation recently**: 0%

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

- Availability of transportation to destination: 39.1%
- Temperature/climate: 38.4%
- Culture and historical sites: 37.7%
- Outstanding natural beauty: 35.6%
- Overall value for money: 34.8%
- Activities/sports: 32.1%
- Having friends/family in/nearby: 31.7%
- Recommended by someone: 30.9%
- Been before and really liked it/special memory: 24.4%
- Low cost: 20.5%
- Nightlife: 14.0%
- Other: 3.6%
- Don’t know: 2.3%
- None of these: 1.4%
- N/A - Haven’t been on vacation recently

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

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Temperature/climate</td>
<td>43.6%</td>
</tr>
<tr>
<td>Having friends/family in/nearby</td>
<td>29.9%</td>
</tr>
<tr>
<td>Overall value for money</td>
<td>29.8%</td>
</tr>
<tr>
<td>Activities/sports</td>
<td>29.0%</td>
</tr>
<tr>
<td>Culture and historical sites</td>
<td>28.5%</td>
</tr>
<tr>
<td>Availability of transportation to destination</td>
<td>28.4%</td>
</tr>
<tr>
<td>Nightlife</td>
<td>26.3%</td>
</tr>
<tr>
<td>Low cost</td>
<td>24.1%</td>
</tr>
<tr>
<td>Outstanding natural beauty</td>
<td>23.7%</td>
</tr>
<tr>
<td>Been before and really liked it/special memory</td>
<td>20.8%</td>
</tr>
<tr>
<td>Recommended by someone</td>
<td>18.2%</td>
</tr>
<tr>
<td>Other</td>
<td>1.3%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>0.4%</td>
</tr>
<tr>
<td>None of these</td>
<td></td>
</tr>
<tr>
<td>N/A - Haven’t been on vacation recently</td>
<td>5.1%</td>
</tr>
</tbody>
</table>

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

1. Overall value for money: 30.3%
2. Outstanding natural beauty: 24.2%
3. Temperature/climate: 24.1%
4. Having friends/family in/nearby: 23.4%
5. Low cost: 23.0%
6. Been before and really liked it/special memory: 18.6%
7. Culture and historical sites: 18.6%
8. Activities/sports: 16.5%
9. Availability of transportation to destination: 14.8%
10. Recommended by someone: 13.2%
11. Nightlife: 8.6%
12. Other: 5.8%
13. Don't know: 2.4%
14. None of these: 2.3%
15. N/A - Haven't been on vacation recently: 23.7%

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

<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>More than $4,000</td>
<td>13%</td>
<td>18%</td>
<td>3%</td>
<td>8%</td>
</tr>
<tr>
<td>$2,500-$3,999</td>
<td>14%</td>
<td>13%</td>
<td>13%</td>
<td>5%</td>
</tr>
<tr>
<td>$1,500-$2,499</td>
<td>20%</td>
<td>21%</td>
<td>17%</td>
<td>7%</td>
</tr>
<tr>
<td>Less than $1,500</td>
<td>36%</td>
<td>32%</td>
<td>34%</td>
<td>49%</td>
</tr>
<tr>
<td>Nothing/Don't Know</td>
<td>16%</td>
<td>15%</td>
<td>13%</td>
<td></td>
</tr>
</tbody>
</table>

Source: HVCB analysis of YouGov data provided by HTA as of July 11, 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.
- Alaska: 12%
- Hawai‘i: 32%
- The Caribbean or West Indies: 5%
- Mexico: 3%
- Canada: 7%
- Europe: 14%
- Asia: 0%
- Oceania (e.g., Australia, New Zealand, etc.): 9%

Leisure trip within Alaska or Hawai‘i:
- Avid Traveler $100K+: 22%
- Avid Traveler $150K+: 21%
- Long-Distance Air Traveler under 55*: 18%
- Nat Rep: 5%

*YouGov sample size <100

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

- Stayed in a hotel or motel:
  - Avid Traveler $100K+: 51%
  - Avid Traveler $150K+: 53%
  - Nat Rep: 49%
- Stayed in short-term/vacation rental:
  - Avid Traveler $100K+: 26%
  - Avid Traveler $150K+: 29%
  - Nat Rep: 24%
- Taken a cruise:
  - Avid Traveler $100K+: 13%
  - Avid Traveler $150K+: 2%
  - Nat Rep: 12%
- Traveled by air:
  - Avid Traveler $100K+: 48%
  - Avid Traveler $150K+: 49%
  - Nat Rep: 93%
- Traveled using a package deal:
  - Avid Traveler $100K+: 17%
  - Avid Traveler $150K+: 15%
  - Nat Rep: 14%
- Rented a car:
  - Avid Traveler $100K+: 36%
  - Avid Traveler $150K+: 36%
  - Nat Rep: 30%
- Used online rideshare services:
  - Avid Traveler $100K+: 30%
  - Avid Traveler $150K+: 31%
  - Nat Rep: 29%
- Visited a travel destination (e.g., museums, resorts, etc.):
  - Avid Traveler $100K+: 39%
  - Avid Traveler $150K+: 45%
  - Nat Rep: 35%

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

- I am passionate about traveling: 85%
- You can only ever get to know a country by experiencing its culture: 81%
- When I go on vacation, I like to go off the beaten track: 70%
- I like to come back from vacation having learnt something new: 74%

Source: HVCB analysis of YouGov data provided by HTA as of July 11, 2021
When I go on vacation I only want to eat, drink and lie in the sun

I tend to spend my leisure time on hobbies and activities

I like to spend my leisure time relaxing

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

- When I'm planning my next vacation, I have at least one destination in mind or already selected:
  - Avid Traveler $100K+: 42%
  - Avid Traveler $150K+: 40%
  - Long-Distance Air Traveler under 55: 50%
  - Nat Rep: 80%

- I usually wait for last minute deals rather than planning my vacations in advance:
  - Avid Traveler $100K+: 34%
  - Avid Traveler $150K+: 40%
  - Long-Distance Air Traveler under 55: 50%
  - Nat Rep: 50%

- I tend to book my vacations outside of school vacations/breaks:
  - Avid Traveler $100K+: 40%
  - Avid Traveler $150K+: 57%
  - Long-Distance Air Traveler under 55: 72%
  - Nat Rep: 84%

- I usually go back to the same places on vacation:
  - Avid Traveler $100K+: 56%
  - Avid Traveler $150K+: 56%
  - Long-Distance Air Traveler under 55: 55%
  - Nat Rep: 86%

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

- I am excited to generally spend more when traveling: Nat Rep 63%, Avid Traveler $100K+ 48%, Avid Traveler $150K+ 54%, Long-Distance Air Traveler under 55 54%
- I try to keep to a strict budget when I go on vacation: Nat Rep 54%, Avid Traveler $100K+ 43%, Avid Traveler $150K+ 54%, Long-Distance Air Traveler under 55 54%
- I would never think of taking a package holiday/vacations: Nat Rep 34%, Avid Traveler $100K+ 39%, Avid Traveler $150K+ 39%, Long-Distance Air Traveler under 55 42%

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