COVID-19 Impact on U.S. Avid Travelers

An HVCB analysis of YouGov data provided by HTA as of August 8, 2021
Reported on August 18, 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?

- It has worsened
- There has been no change
- It has improved
- Don't know

Source: HVCB analysis of YouGov data provided by HTA as of August 8, 2021
Level of comfort visiting an airport right now

<table>
<thead>
<tr>
<th>Level of Comfort</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>Very comfortable</td>
<td>21%</td>
<td>16%</td>
<td>13%</td>
<td>13%</td>
</tr>
<tr>
<td>Fairly comfortable</td>
<td>30%</td>
<td>27%</td>
<td>28%</td>
<td>19%</td>
</tr>
<tr>
<td>Fairly uncomfortable</td>
<td>19%</td>
<td>25%</td>
<td>26%</td>
<td>20%</td>
</tr>
<tr>
<td>Very uncomfortable</td>
<td>26%</td>
<td>21%</td>
<td>28%</td>
<td>21%</td>
</tr>
<tr>
<td>Not applicable – This isn't a place I would ever visit</td>
<td>5%</td>
<td>14%</td>
<td>6%</td>
<td></td>
</tr>
<tr>
<td>Don't know</td>
<td>6%</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: HVCB analysis of YouGov data provided by HTA as of August 8, 2021
Future Travel Plans
Future Travel – Expected change to air travel in the next 12 months

Source: HV/CB analysis of YouGov data provided by HTA as of August 8, 2021
### Future Travel – Likelihood of purchasing travel or leisure services in the next 12 months

<table>
<thead>
<tr>
<th></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>Very likely</td>
<td>50%</td>
<td>41%</td>
<td>20%</td>
<td>6%</td>
</tr>
<tr>
<td>Likely</td>
<td>18%</td>
<td>16%</td>
<td>21%</td>
<td>6%</td>
</tr>
<tr>
<td>Somewhat likely</td>
<td>12%</td>
<td>17%</td>
<td>22%</td>
<td>9%</td>
</tr>
<tr>
<td>Not very likely</td>
<td>18%</td>
<td>17%</td>
<td>20%</td>
<td>7%</td>
</tr>
<tr>
<td>Not at all likely</td>
<td>20%</td>
<td>21%</td>
<td>29%</td>
<td>3%</td>
</tr>
</tbody>
</table>

Source: HVCB analysis of YouGov data provided by HTA as of August 8, 2021
Future Travel – Likelihood of booking a flight in the next 12 months

- **Avid Traveler $100K+**
  - Very likely: 66%
  - Likely: 47%
  - Somewhat likely: 29%
  - Not very likely: 10%
  - Not at all likely: 17%

- **Avid Traveler $150K+**
  - Very likely: 69%
  - Likely: 26%
  - Somewhat likely: 26%
  - Not very likely: 4%
  - Not at all likely: 6%

- **Long-Distance Air Traveler under 55**
  - Very likely: 66%
  - Likely: 26%
  - Somewhat likely: 18%
  - Not very likely: 3%
  - Not at all likely: 19%

- **Nat Rep**
  - Very likely: 40%
  - Likely: 18%
  - Somewhat likely: 15%
  - Not very likely: 1%
  - Not at all likely: 6%

Source: HVCB analysis of YouGov data provided by HTA as of August 8, 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 August 8, 2021
State of Residence

Source: HVCB analysis of YouGov data provided by HTA as of August 8, 2021
## Top 10 States of Residence by Segment

### Avid Traveler

- **$100K, 25-54, individual**
  - California: 17.8%
  - New York: 9.9%
  - Florida: 8.1%
  - Texas: 8.1%
  - Illinois: 4.2%
  - Colorado: 3.3%
  - New Jersey: 3.2%
  - Washington: 3.1%
  - Georgia: 2.9%
  - Ohio: 2.6%

- **$150K, 25-54, 2+ household**
  - California: 19.3%
  - New York: 12.6%
  - Texas: 7.7%
  - Florida: 7.0%
  - Washington: 3.7%
  - Massachusetts: 3.7%
  - Maryland: 3.5%
  - Virginia: 3.4%
  - Illinois: 3.4%
  - Ohio: 3.2%

### Long-Distance Air Traveler under 55

- California: 17.1%
- Texas: 11.3%
- New York: 10.1%
- Florida: 8.5%
- New Jersey: 6.8%
- Illinois: 5.9%
- Nevada: 3.6%
- Missouri: 2.7%
- Washington: 2.3%
- Indiana: 2.3%

### Nat Rep

- California: 10.3%
- Texas: 8.3%
- Florida: 7.0%
- New York: 6.6%
- Pennsylvania: 4.4%
- Ohio: 3.7%
- Illinois: 3.6%
- Georgia: 3.1%
- North Carolina: 2.8%
- Michigan: 2.8%

Source: HVCB analysis of YouGov data provided by HTA as of August 8, 2021
Leisure trip – most recent destination

<table>
<thead>
<tr>
<th>Destination</th>
<th>Avid Traveler $100K+</th>
<th>Avid Traveler $150K+</th>
<th>Long-Distance Air Traveler under 55</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leisure trip within the continental U.S.</td>
<td>30%</td>
<td>28%</td>
<td>29%</td>
</tr>
<tr>
<td>Alaska</td>
<td>9%</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Hawai‘i</td>
<td>23%</td>
<td>28%</td>
<td>9%</td>
</tr>
<tr>
<td>The Caribbean or West Indies</td>
<td>8%</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>Mexico</td>
<td>5%</td>
<td>5%</td>
<td>9%</td>
</tr>
<tr>
<td>Canada</td>
<td>2%</td>
<td>3%</td>
<td>4%</td>
</tr>
<tr>
<td>Europe</td>
<td>5%</td>
<td>6%</td>
<td>13%</td>
</tr>
<tr>
<td>Asia</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Oceania (e.g., Australia, New Zealand, etc.)</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
</tr>
</tbody>
</table>

Source: HVCB analysis of YouGov data provided by HTA as of August 8, 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>NatRep</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall value for money</td>
<td>39.4%</td>
<td>33.1%</td>
<td>25.8%</td>
<td>30.5%</td>
</tr>
<tr>
<td>The temperature/climate</td>
<td>41.9%</td>
<td>44.8%</td>
<td>41.3%</td>
<td>24.1%</td>
</tr>
<tr>
<td>Outstanding natural beauty</td>
<td>38.9%</td>
<td>35.2%</td>
<td>21.8%</td>
<td>24.1%</td>
</tr>
<tr>
<td>Availability of transportation to destination</td>
<td>34.3%</td>
<td>39.9%</td>
<td>22.8%</td>
<td>14.7%</td>
</tr>
<tr>
<td>Activities/sports</td>
<td>34.6%</td>
<td>35.5%</td>
<td>26.7%</td>
<td>16.3%</td>
</tr>
<tr>
<td>Having friends/family in/nearby</td>
<td>30.9%</td>
<td>30.5%</td>
<td>32.5%</td>
<td>23.5%</td>
</tr>
<tr>
<td>Recommended by someone</td>
<td>25.5%</td>
<td>30.3%</td>
<td>18.4%</td>
<td>13.2%</td>
</tr>
<tr>
<td>Culture and historical sites</td>
<td>27.6%</td>
<td>34.2%</td>
<td>27.7%</td>
<td>18.6%</td>
</tr>
<tr>
<td>Been before and really liked it/special memory</td>
<td>25.0%</td>
<td>22.6%</td>
<td>17.5%</td>
<td>18.9%</td>
</tr>
<tr>
<td>Low cost</td>
<td>24.2%</td>
<td>20.6%</td>
<td>24.8%</td>
<td>23.3%</td>
</tr>
<tr>
<td>Nightlife</td>
<td>16.0%</td>
<td>15.3%</td>
<td>24.4%</td>
<td>8.6%</td>
</tr>
<tr>
<td>Other</td>
<td>5.1%</td>
<td>4.2%</td>
<td>0.7%</td>
<td>5.7%</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>1.7%</td>
<td>1.4%</td>
<td>0.7%</td>
<td>2.3%</td>
</tr>
<tr>
<td>N/A - Haven't been on vacation recently</td>
<td>3.0%</td>
<td>1.0%</td>
<td>5.5%</td>
<td>23.7%</td>
</tr>
</tbody>
</table>

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Reason for choosing most recent leisure destination

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### Reason for choosing most recent leisure destination

<table>
<thead>
<tr>
<th>Reason</th>
<th>Avid Traveler $150K+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Availability of transportation to destination</td>
<td>33.1%</td>
</tr>
<tr>
<td>Temperature/climate</td>
<td>44.8%</td>
</tr>
<tr>
<td>Culture and historical sites</td>
<td>35.2%</td>
</tr>
<tr>
<td>Outstanding natural beauty</td>
<td>39.9%</td>
</tr>
<tr>
<td>Overall value for money</td>
<td>35.5%</td>
</tr>
<tr>
<td>Activities/sports</td>
<td>30.5%</td>
</tr>
<tr>
<td>Having friends/family in/nearby</td>
<td>30.3%</td>
</tr>
<tr>
<td>Recommended by someone</td>
<td>34.2%</td>
</tr>
<tr>
<td>Been before and really liked it/special memory</td>
<td>22.6%</td>
</tr>
<tr>
<td>Low cost</td>
<td>20.6%</td>
</tr>
<tr>
<td>Nightlife</td>
<td>15.3%</td>
</tr>
<tr>
<td>Other</td>
<td>4.2%</td>
</tr>
<tr>
<td>Don't know</td>
<td>1.4%</td>
</tr>
<tr>
<td>None of these</td>
<td>1.0%</td>
</tr>
<tr>
<td>N/A - Haven't been on vacation recently</td>
<td></td>
</tr>
</tbody>
</table>

Source: HVCB analysis of YouGov data provided by HTA as of August 8, 2021
Reason for choosing most recent leisure destination

Long-Distance Air Traveler under 55

- Temperature/climate: 41.3%
- Having friends/family in/nearby: 32.5%
- Overall value for money: 25.8%
- Activities/sports: 26.7%
- Culture and historical sites: 27.7%
- Availability of transportation to destination: 22.8%
- Nightlife: 24.4%
- Low cost: 24.8%
- Outstanding natural beauty: 21.8%
- Been before and really liked it/special memory: 17.5%
- Recommended by someone: 18.4%
- Other: 0.7%
- Don’t know: 0.4%
- None of these: 0.7%
- N/A - Haven’t been on vacation recently: 5.5%

Source: HV/CB analysis of YouGov data provided by HTA as of August 8, 2021
Reason for choosing most recent leisure destination

- Overall value for money: 30.5%
- Outstanding natural beauty: 24.1%
- Temperature/climate: 24.1%
- Having friends/family in/nearby: 14.7%
- Low cost: 16.3%
- Been before and really liked it/special memory: 23.5%
- Culture and historical sites: 13.2%
- Activities/sports: 18.6%
- Availability of transportation to destination: 18.9%
- Recommended by someone: 23.3%
- Nightlife: 8.6%
- Other: 5.7%
- Don't know: 2.4%
- None of these: 2.3%
- N/A - Haven't been on vacation recently: 23.7%

Source: HV/CB analysis of YouGov data provided by HTA as of August 8, 2021
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 August 8, 2021
Most recent leisure trip - total spend

- More than $4,000: Avid Traveler $100K+ 14%, Avid Traveler $150K+ 20%, Long-Distance Air Traveler under 55 3%, Nat Rep 7%
- $2,500-$3,999: Avid Traveler $100K+ 14%, Avid Traveler $150K+ 15%, Long-Distance Air Traveler under 55 12%, Nat Rep 12%
- $1,500-$2,499: Avid Traveler $100K+ 21%, Avid Traveler $150K+ 22%, Long-Distance Air Traveler under 55 17%, Nat Rep 7%
- Less than $1,500: Avid Traveler $100K+ 26%, Avid Traveler $150K+ 20%, Long-Distance Air Traveler under 55 36%, Nat Rep 27%
- Nothing/Don't Know: Avid Traveler $100K+ 14%, Avid Traveler $150K+ 15%, Long-Distance Air Traveler under 55 12%

Source: HVCB analysis of YouGov data provided by HTA as of August 8, 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.: 23%
Alaska: 20%
Hawai'i: 21%
The Caribbean or West Indies: 18%
Mexico: 15%
Canada: 14%
Europe: 11%
Asia: 1%
Oceania (e.g., Australia, New Zealand, etc.): 2%
Don't know: 9%

*YouGov sample size <100

Source: HVCB analysis of YouGov data provided by HTA as of August 8, 2021
Leisure trip - activities in last 12 months

- Stayed in a hotel or motel
- Stayed in short-term/vacation rental
- Taken a cruise
- Traveled by air
- Traveled using a package deal
- Rented a car
- Used online rideshare services
- Visited a travel destination (e.g. museums, resorts, etc.)

Source: HVCB analysis of YouGov data provided by HTA as of August 8, 2021
Travel Mindset

- I am passionate about traveling
  - Avid Traveler $100K+: 87%
  - Avid Traveler $150K+: 88%
  - Nat Rep: 87%

- You can only ever get to know a country by experiencing its culture
  - Avid Traveler $100K+: 86%
  - Avid Traveler $150K+: 86%
  - Nat Rep: 91%

- When I go on vacation, I like to go off the beaten track
  - Avid Traveler $100K+: 72%
  - Avid Traveler $150K+: 72%
  - Nat Rep: 76%

- I like to come back from vacation having learnt something new
  - Avid Traveler $100K+: 69%
  - Avid Traveler $150K+: 78%
  - Nat Rep: 85%

Source: HVCB analysis of YouGov data provided by HTA as of August 8, 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 August 8, 2021
When I’m planning my next vacation, I have at least one destination in mind or already selected

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

**I usually wait for last minute deals rather than planning my vacations in advance**
- 43%
- 41%
- 33%
- 52%

**I tend to book my vacations outside of school vacations/breaks**
- 39%
- 57%
- 57%
- 71%

**I usually go back to the same places on vacation**
- 55%
- 56%
- 56%
- 49%

When I’m planning my next vacation, I have at least one destination in mind or already selected
- 70%
- 77%
- 85%
- 86%

Source: HV/CB analysis of YouGov data provided by HTA as of August 8, 2021
**Booking & Spending Attitudes**

- **I would never think of taking a package holiday/vacations**
  - Avid Traveler $100K+: 33%
  - Avid Traveler $150K+: 40%
  - Long-Distance Air Traveler under 55: 42%
  - Nat Rep: 44%

- **I try to keep to a strict budget when I go on vacation**
  - Avid Traveler $100K+: 44%
  - Avid Traveler $150K+: 47%
  - Long-Distance Air Traveler under 55: 55%
  - Nat Rep: 54%

- **I am excited to generally spend more when traveling**
  - Avid Traveler $100K+: 47%
  - Avid Traveler $150K+: 64%
  - Long-Distance Air Traveler under 55: 63%
  - Nat Rep: 64%

Source: HVCB analysis of YouGov data provided by HTA as of August 8, 2021