

COVID-19 Impact on U.S. Avid Travelers

An HVCB analysis of YouGov data provided by HTA as of May 9, 2021

Reported on May 20, 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)

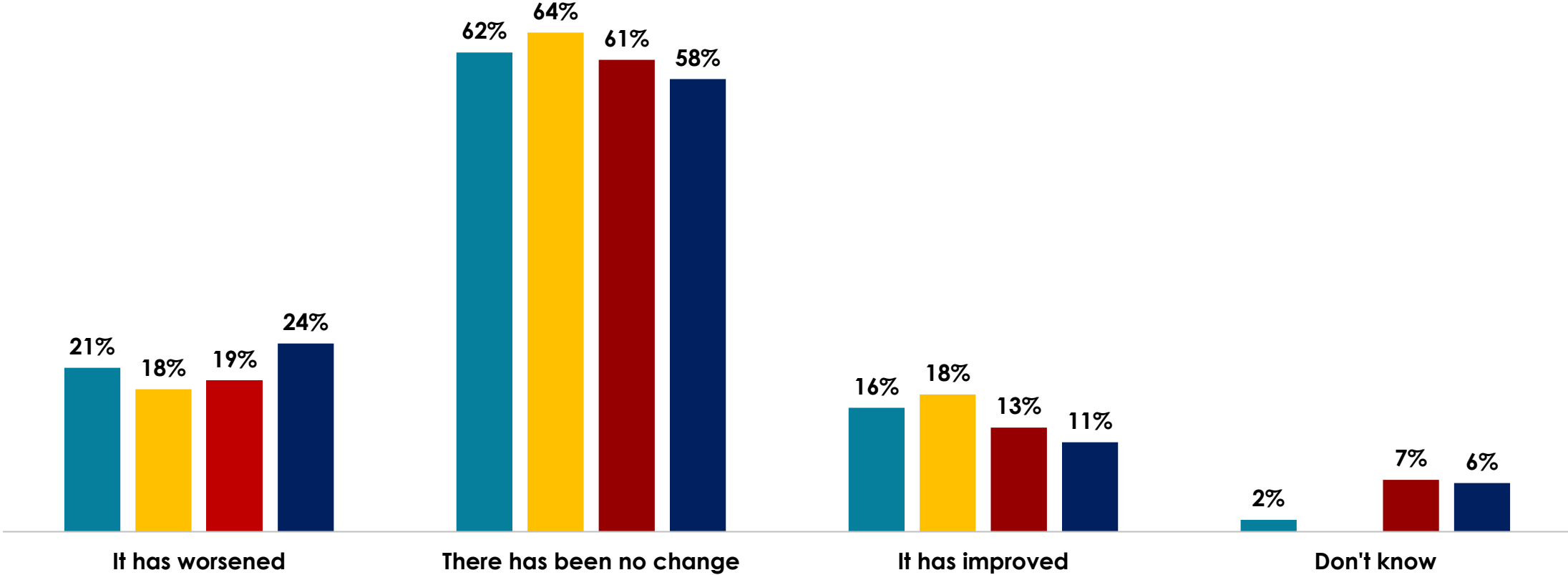
- Representative of U.S. adults in terms of age, gender, social class and education



Travelers' Pandemic Outlook

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

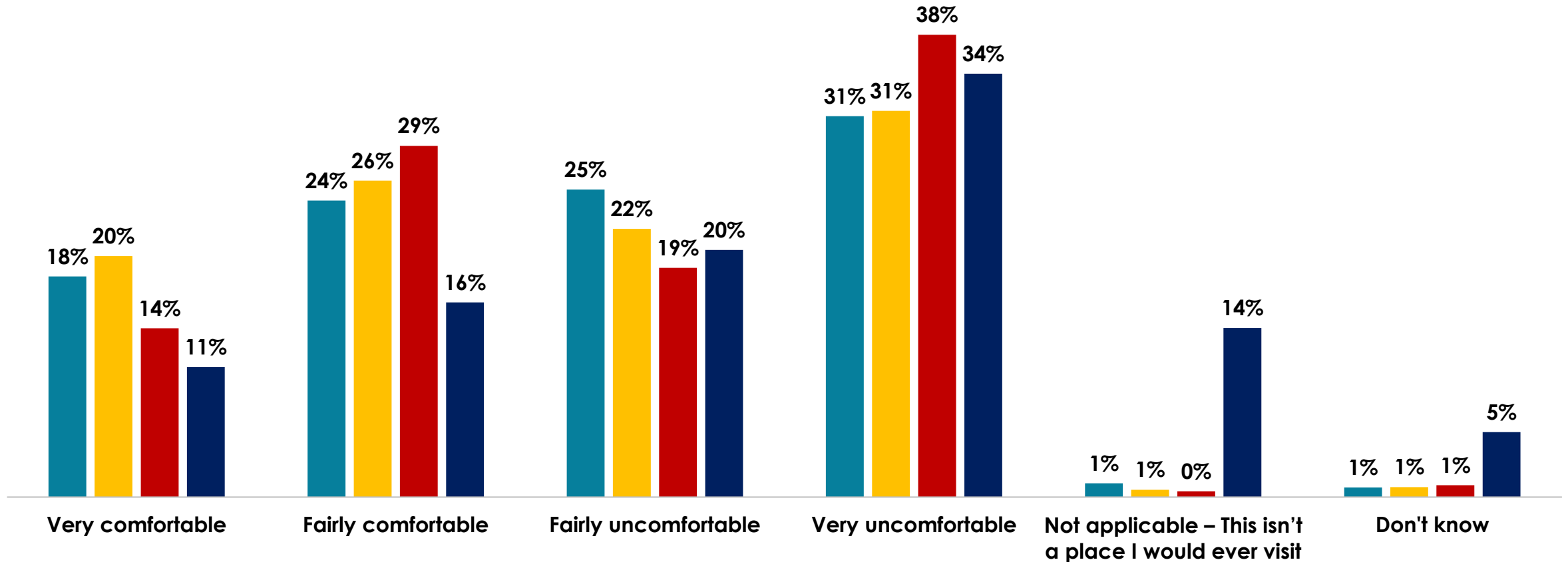
■ Avid Traveler \$100K+ ■ Avid Traveler \$150K+ ■ Long-Distance Air Traveler under 55 ■ Nat Rep



Source: HVCB analysis of YouGov data provided by HTA as of May 9, 2021

Level of comfort visiting an airport right now

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

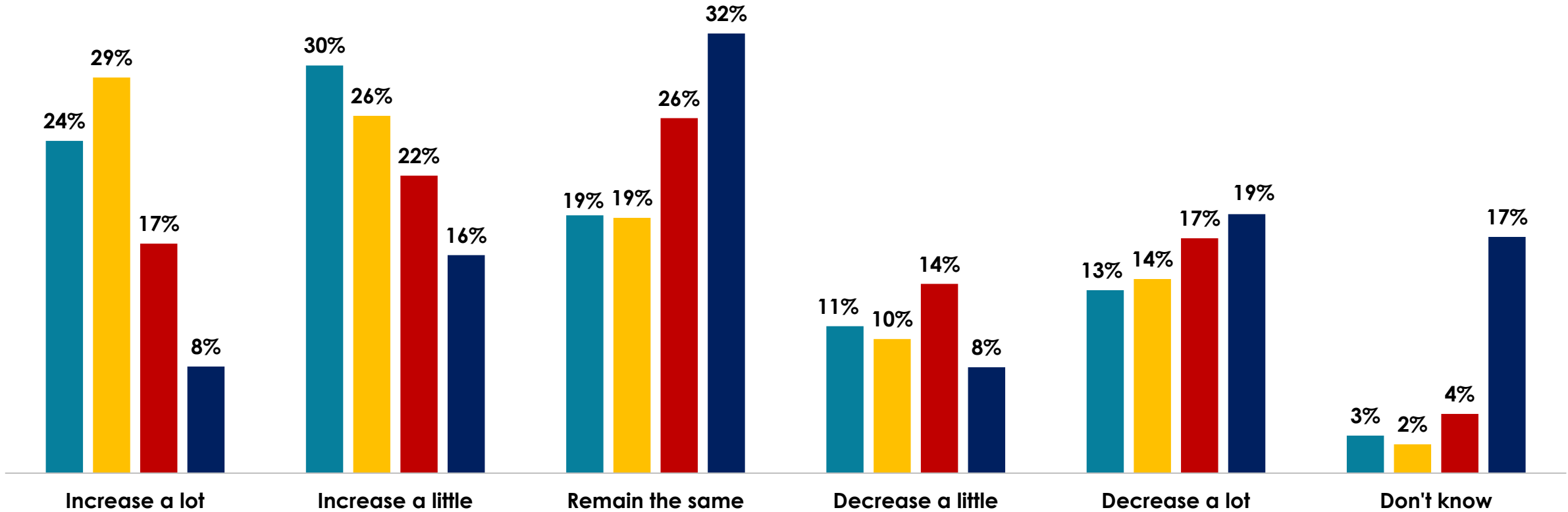




Future Travel Plans

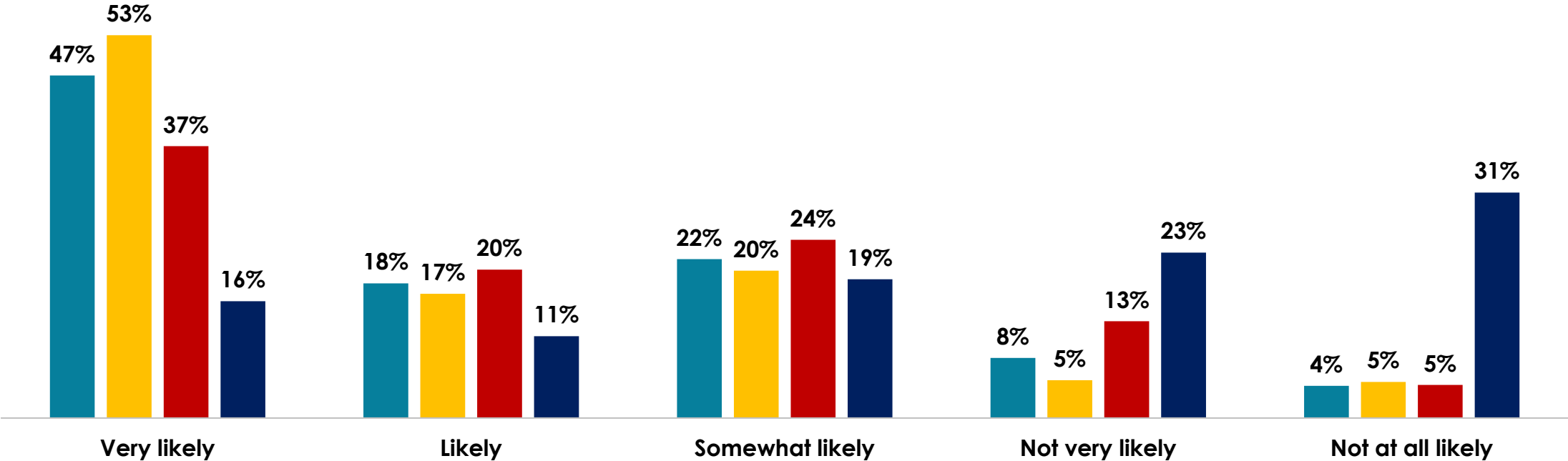
Future Travel – Expected change to air travel in the next 12 months

■ Avid Traveler \$100K+
 ■ Avid Traveler \$150K+
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Future Travel – Likelihood of purchasing travel or leisure services in the next 12 months

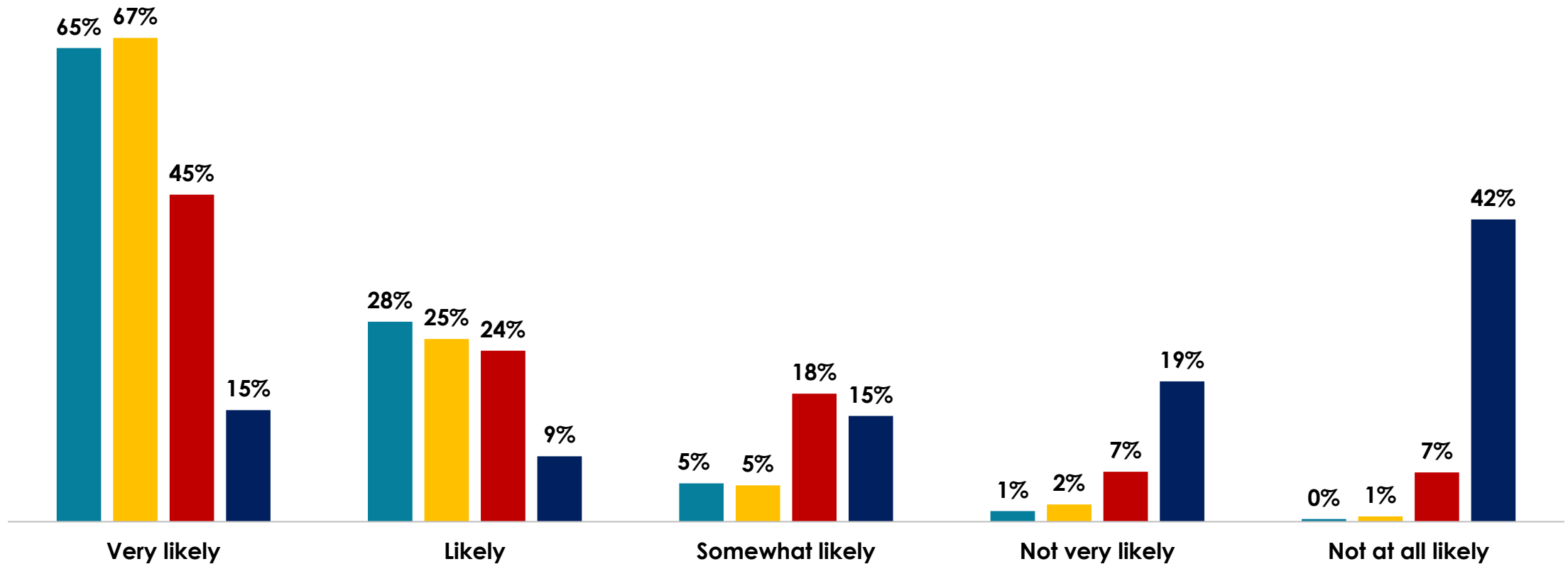
■ Avid Traveler \$100K+ ■ Avid Traveler \$150K+ ■ Long-Distance Air Traveler under 55 ■ Nat Rep



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

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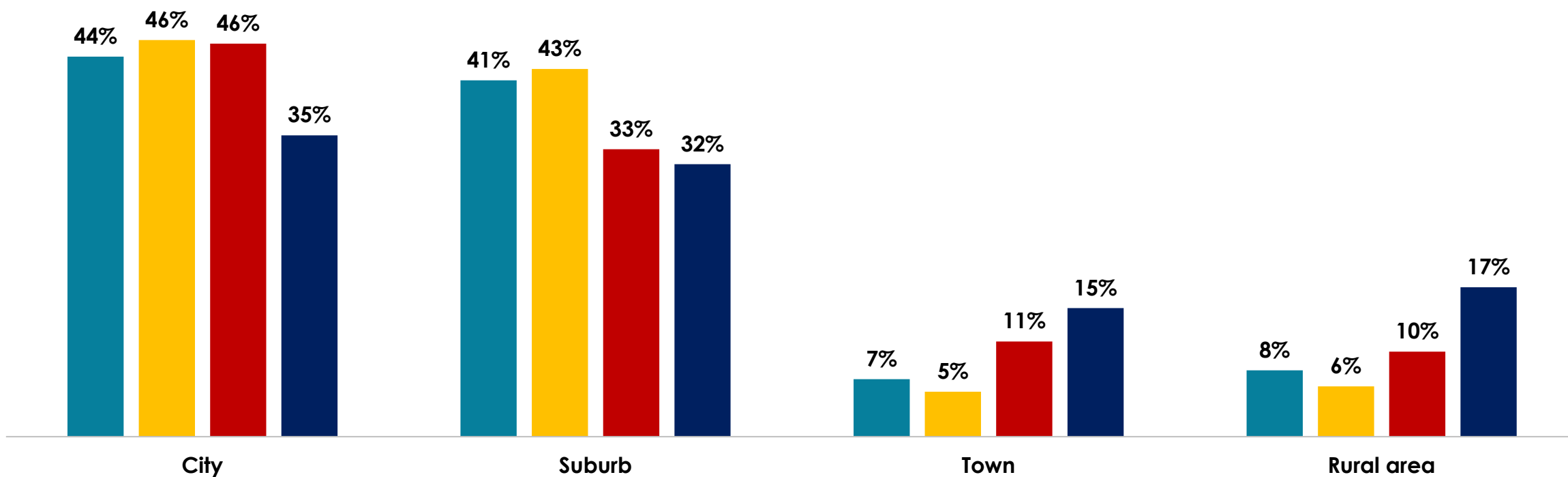


Traveler Profiles

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

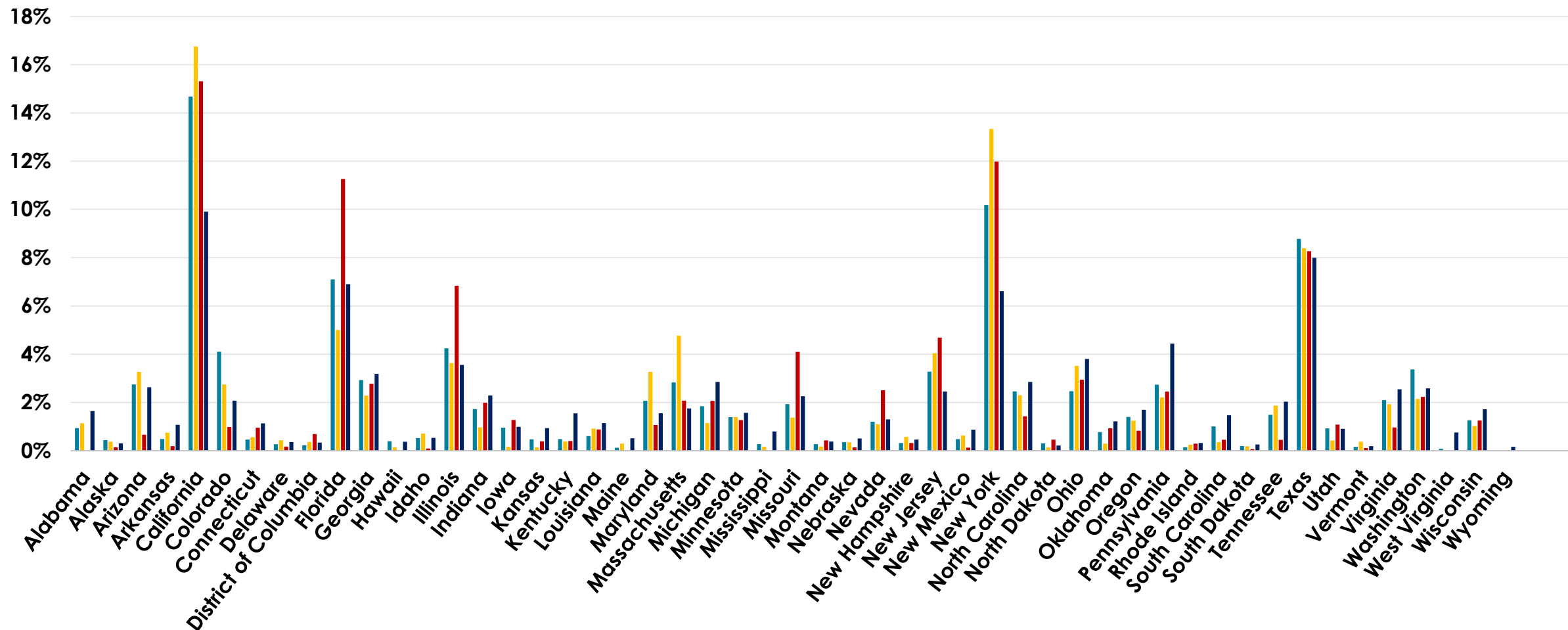
Type of Area Living In

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



State of Residence

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



Top 10 States of Residence by Segment

Avid Traveler (\$100K, 25-54, individual)	
California	14.7%
New York	10.2%
Texas	8.8%
Florida	7.1%
Illinois	4.2%
Colorado	4.1%
Washington	3.4%
New Jersey	3.3%
Georgia	2.9%
Massachusetts	2.8%

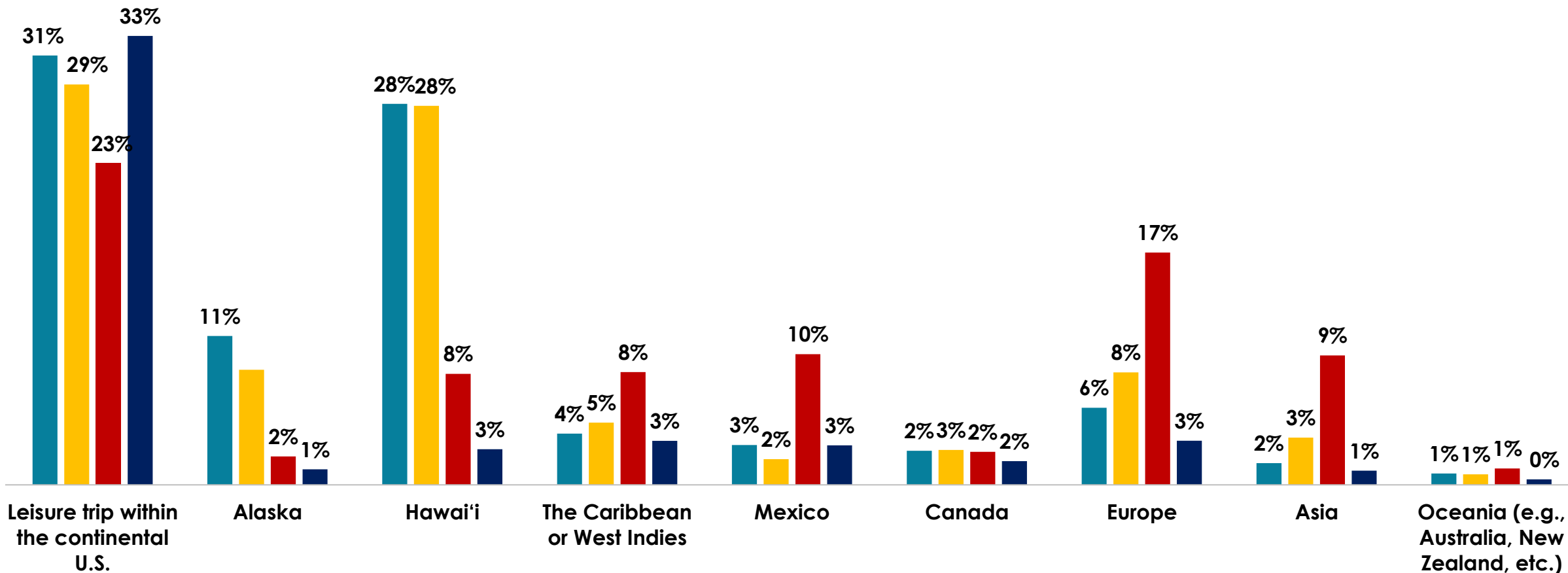
Avid Traveler (\$150K, 25-54, 2+ household)	
California	16.8%
New York	13.3%
Texas	8.4%
Florida	5.0%
Massachusetts	4.8%
New Jersey	4.0%
Illinois	3.6%
Ohio	3.5%
Arizona	3.3%
Maryland	3.3%

Long-Distance Air Traveler under 55	
California	15.3%
New York	12.0%
Florida	11.3%
Texas	8.3%
Illinois	6.8%
New Jersey	4.7%
Missouri	4.1%
Ohio	2.9%
Georgia	2.8%
Nevada	2.5%

Nat Rep	
California	9.9%
Texas	8.0%
Florida	6.9%
New York	6.6%
Pennsylvania	4.4%
Ohio	3.8%
Illinois	3.6%
Georgia	3.2%
Michigan	2.9%
North Carolina	2.9%

Leisure trip – most recent destination

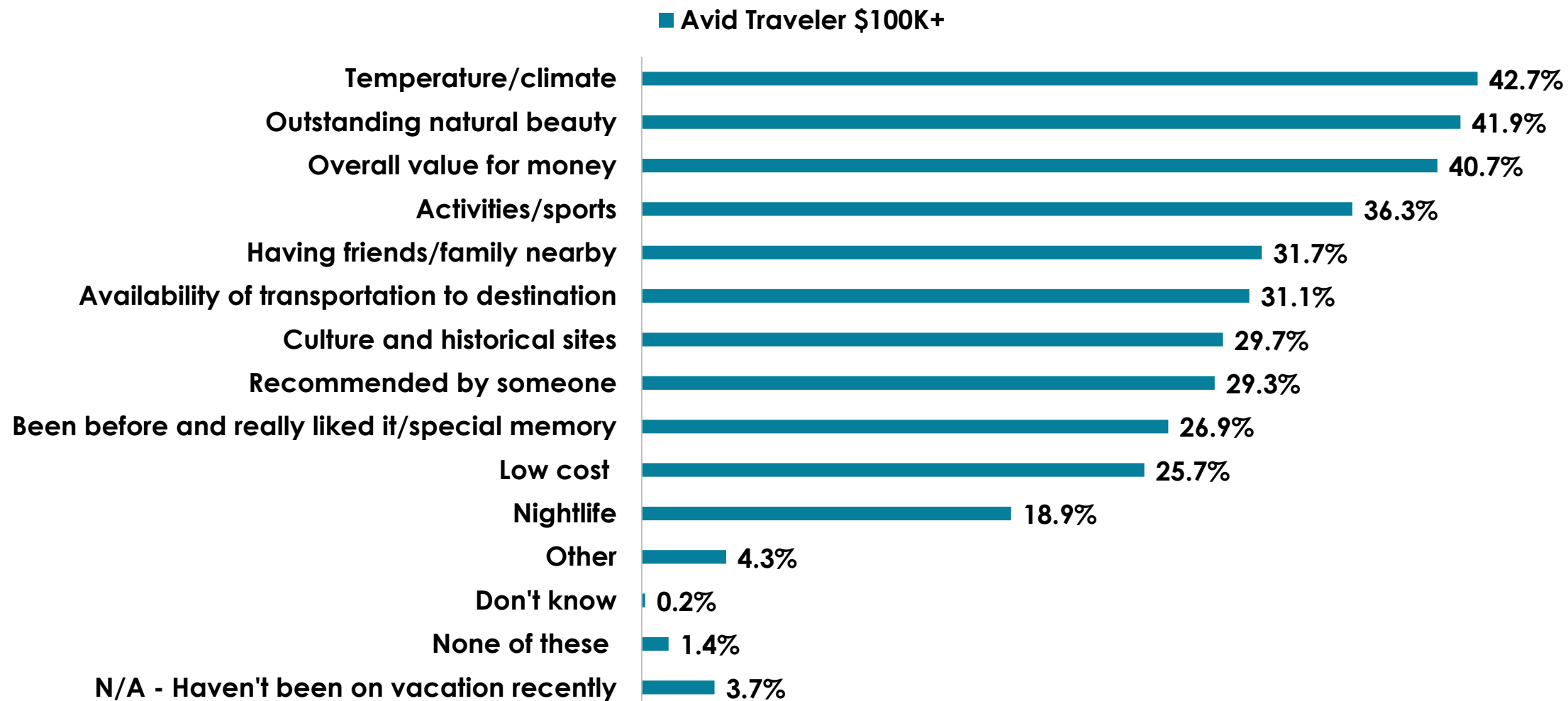
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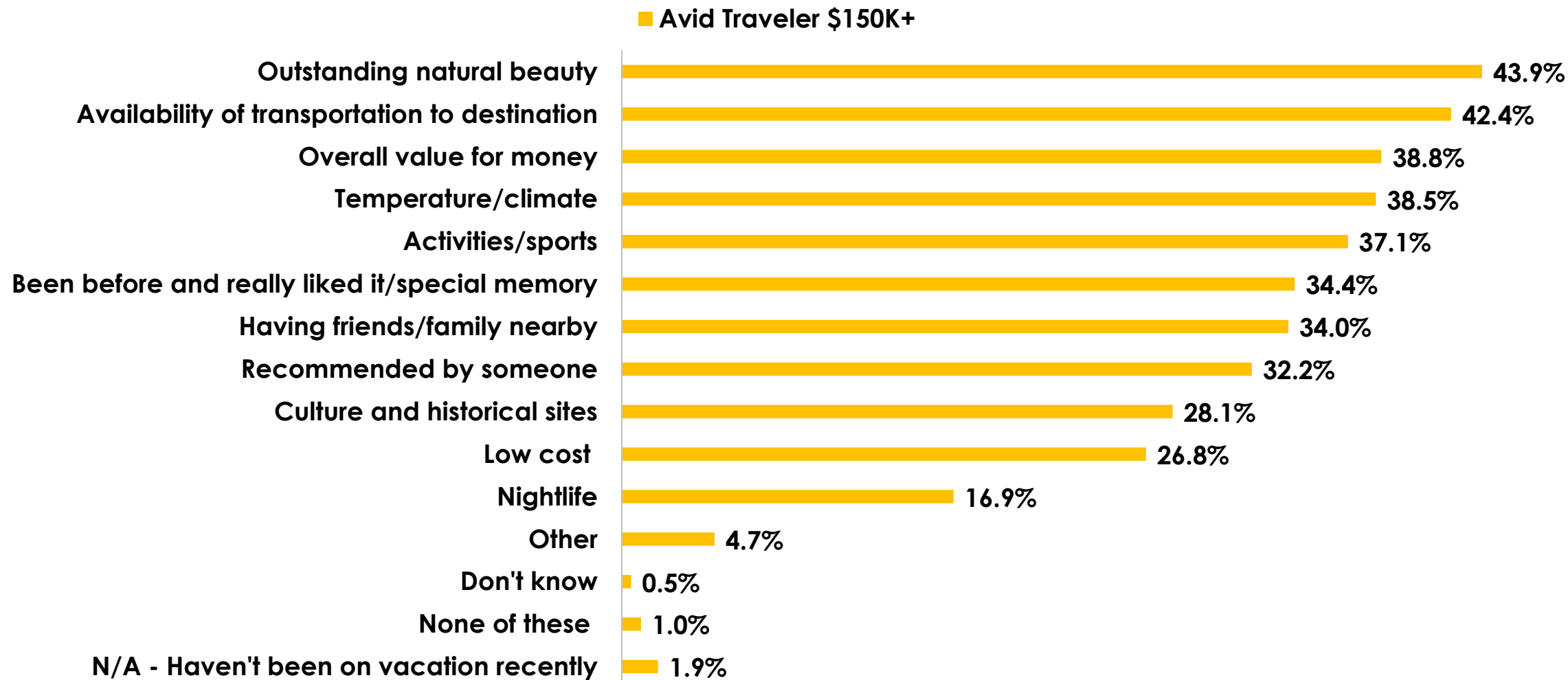
Reason for choosing most recent leisure destination

Reasons	Avid Traveler (\$100K, 25-54, individual)	Avid Traveler (\$150K, 25-54, 2+ household)	Long-Distance Air Traveler under 55	Nat Rep
Outstanding natural beauty	42%	44%	29%	24%
Availability of transportation to destination	31%	42%	26%	15%
Overall value for money	41%	39%	34%	29%
Temperature/climate	43%	39%	35%	24%
Activities/sports	36%	37%	20%	17%
Been before and really liked it/special memory	27%	34%	22%	19%
Having friends/family nearby	32%	34%	32%	23%
Recommended by someone	29%	32%	24%	14%
Culture and historical sites	30%	28%	28%	19%
Low cost	26%	27%	28%	22%
Nightlife	19%	17%	19%	10%
Other	4%	5%	4%	5%
Don't know	0%	0%	1%	3%
None of these	1%	1%	0%	2%
N/A - Haven't been on vacation recently	4%	2%	4%	22%

Reason for choosing most recent leisure destination

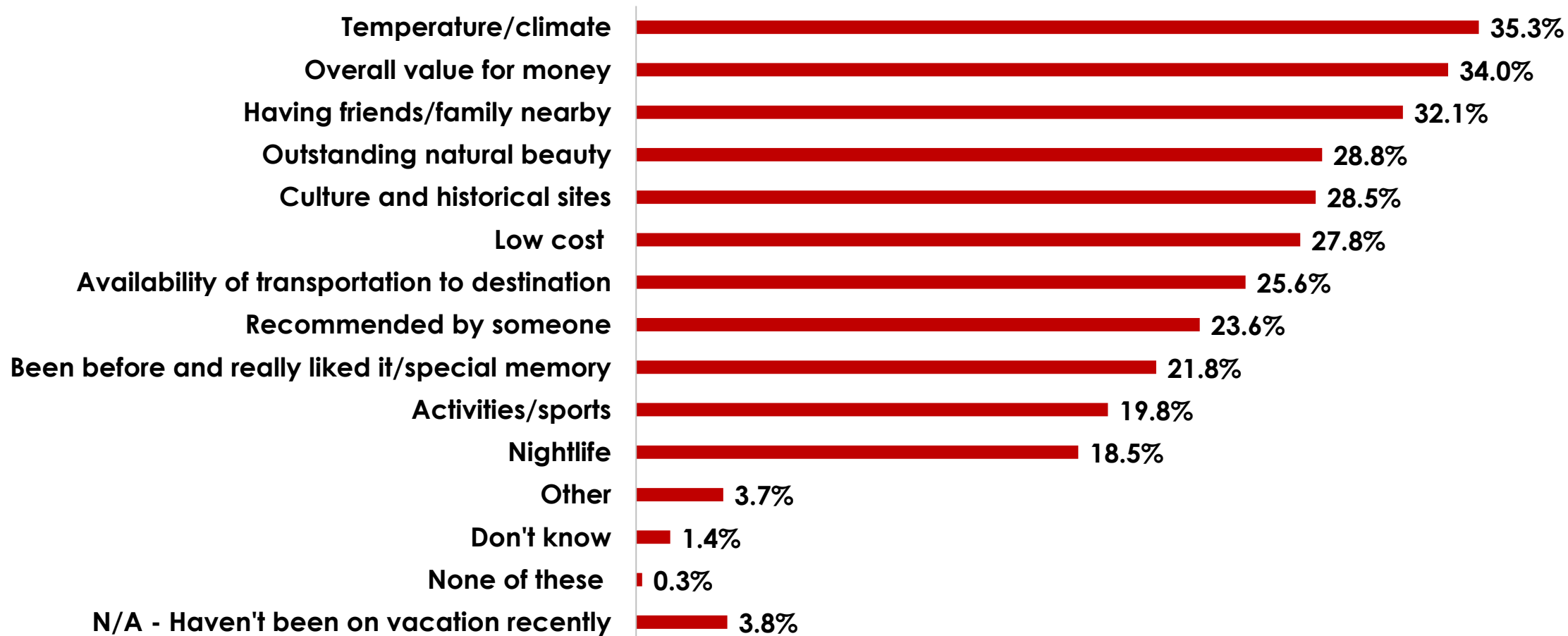


Reason for choosing most recent leisure destination

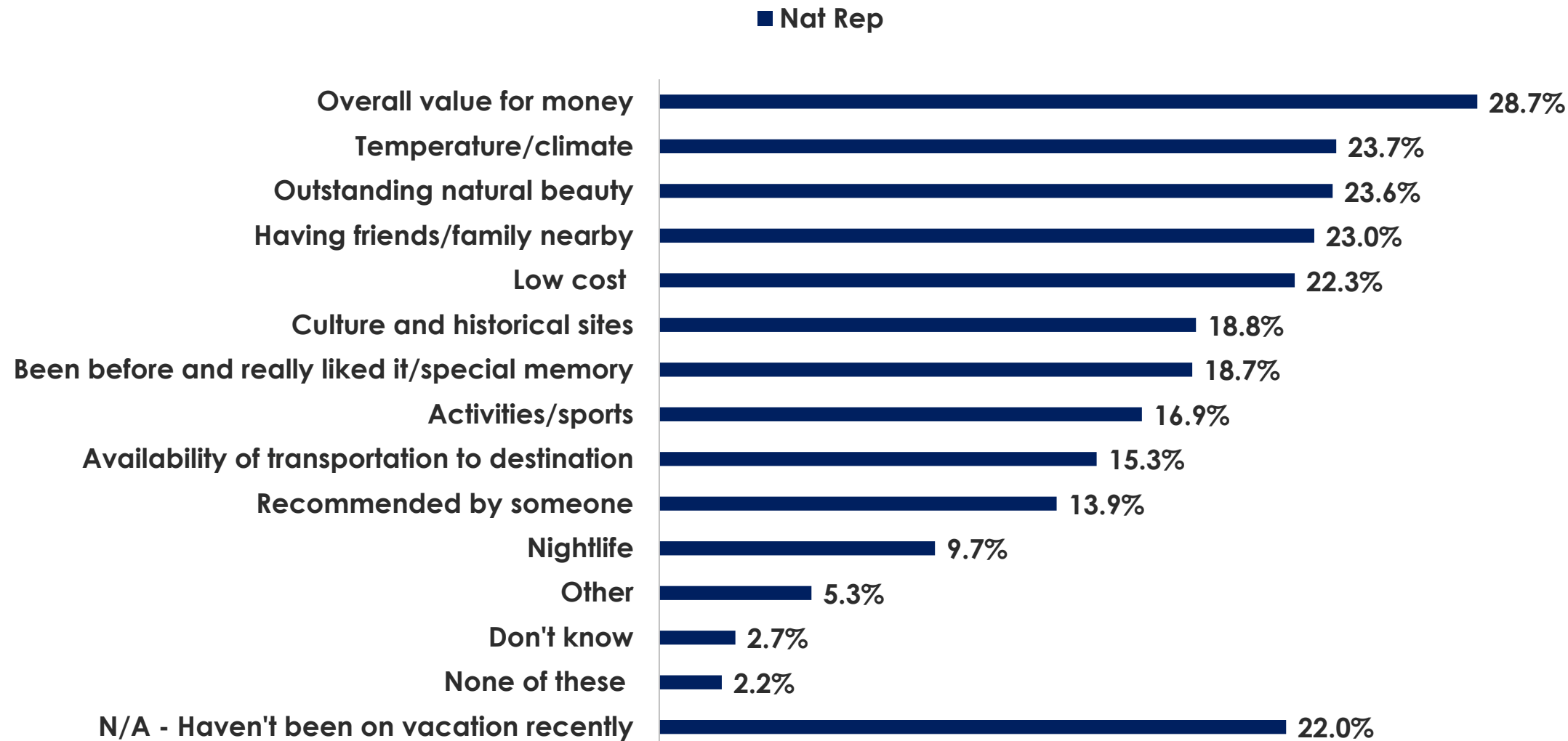


Reason for choosing most recent leisure destination

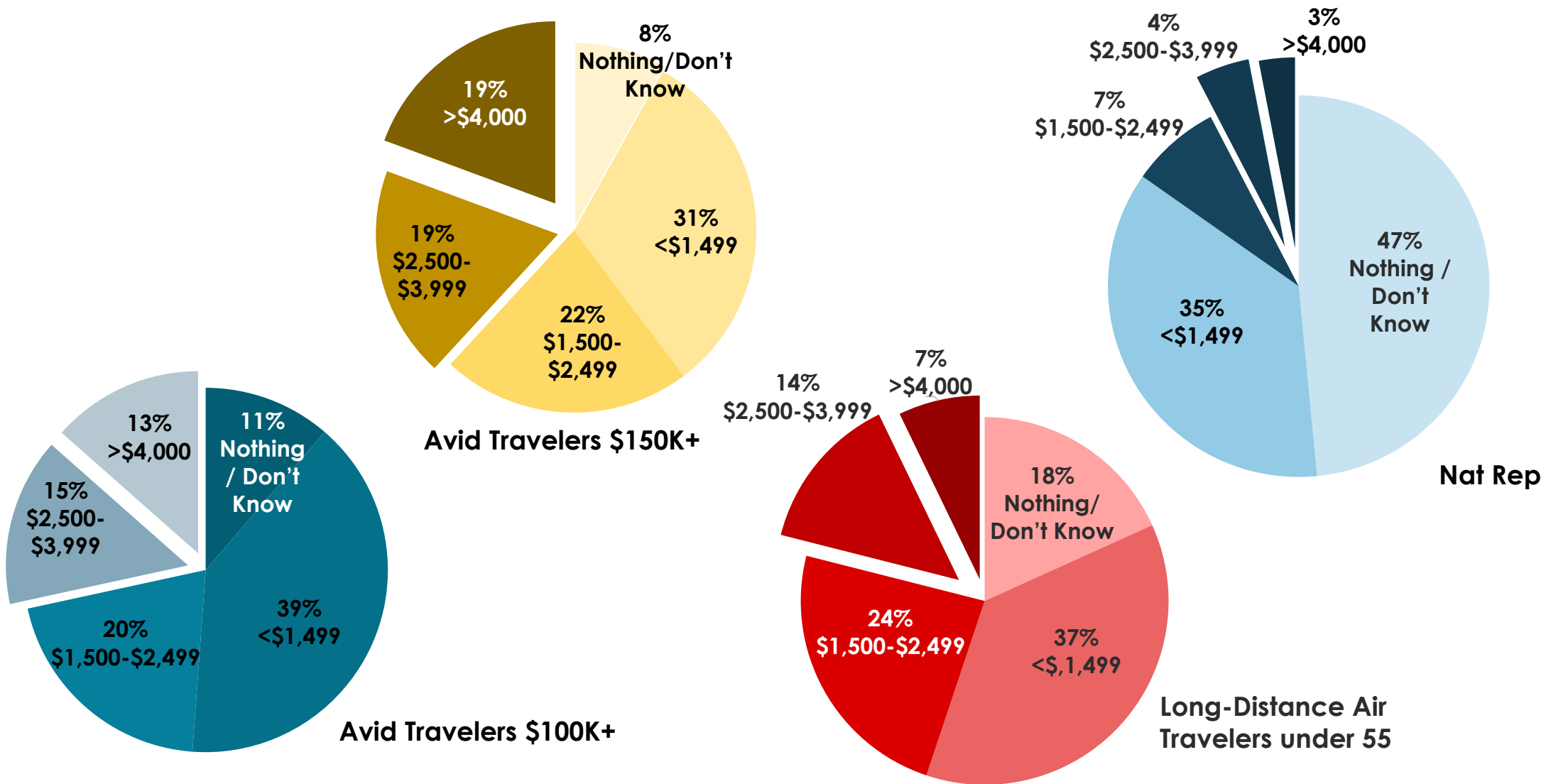
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Reason for choosing most recent leisure destination



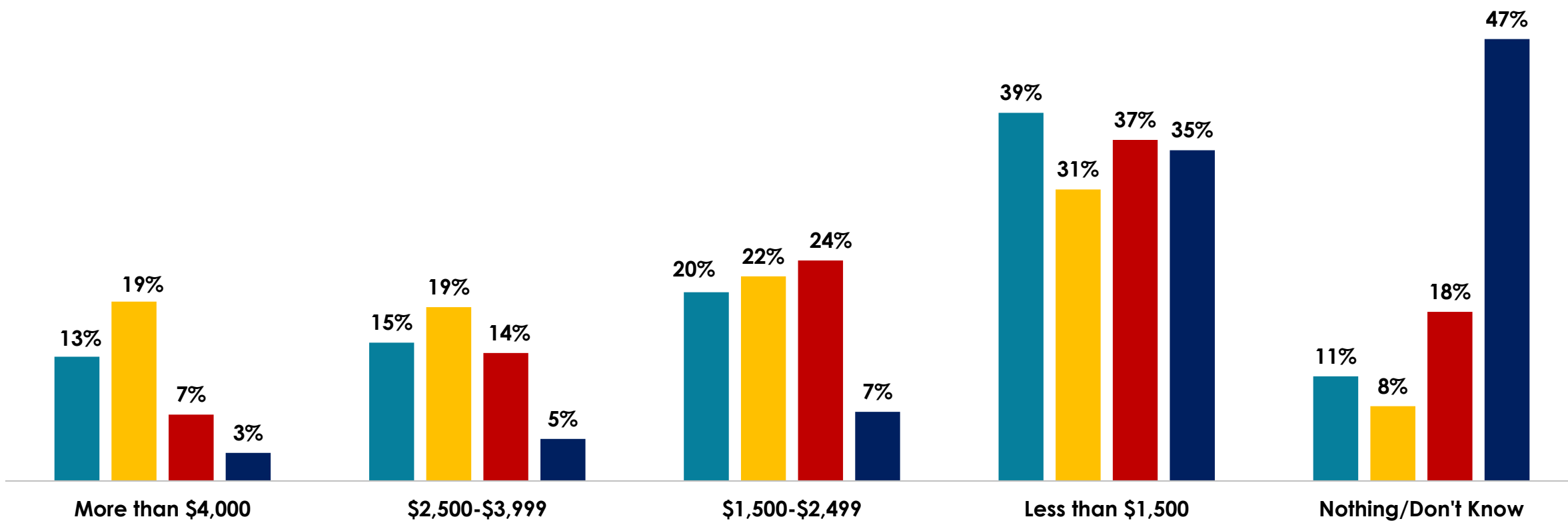
Most recent leisure trip - total spend



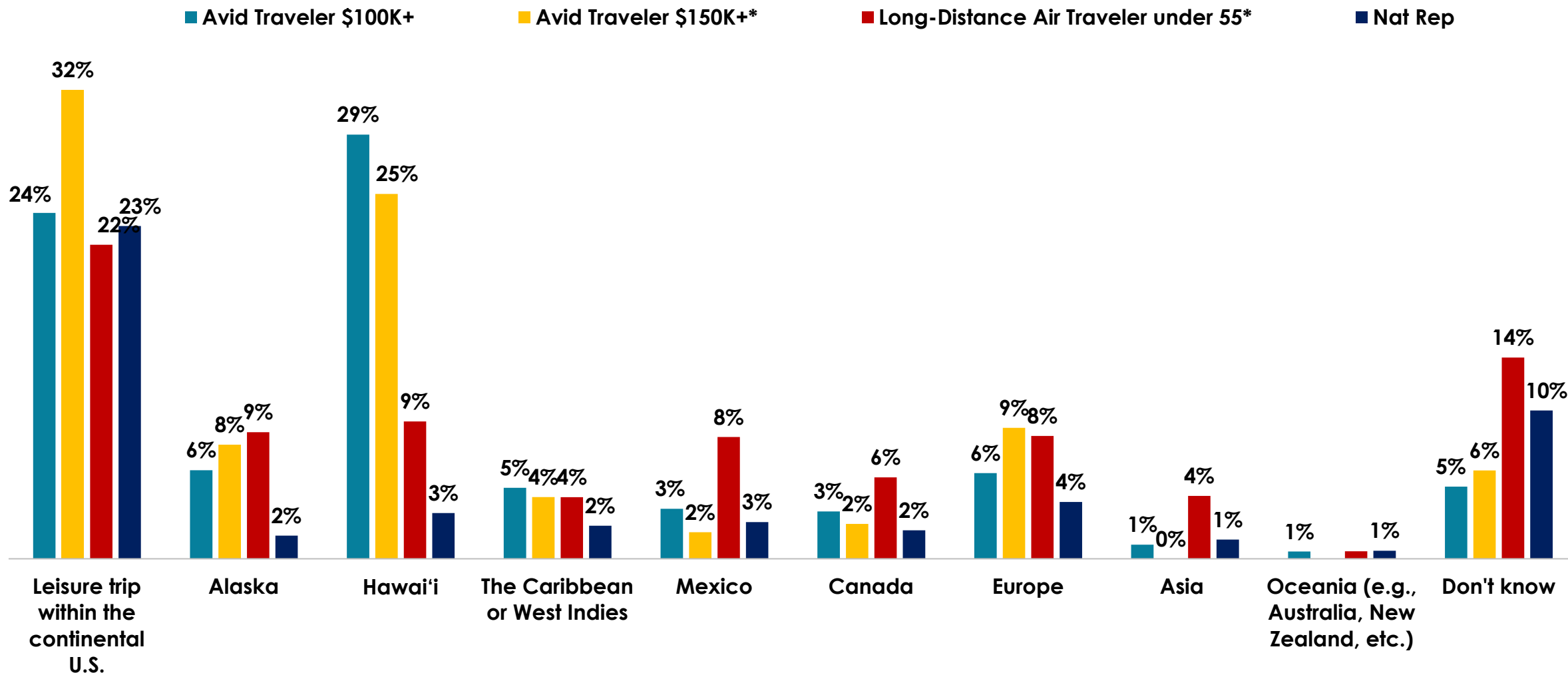
Based on Hawai'i Tourism Authority data, the average U.S. per person per trip spend for 2019 was \$1,693.32.

Most recent leisure trip - total spend

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 ■ Avid Traveler \$150K+
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Leisure trip - next destination



*YouGov sample size <100

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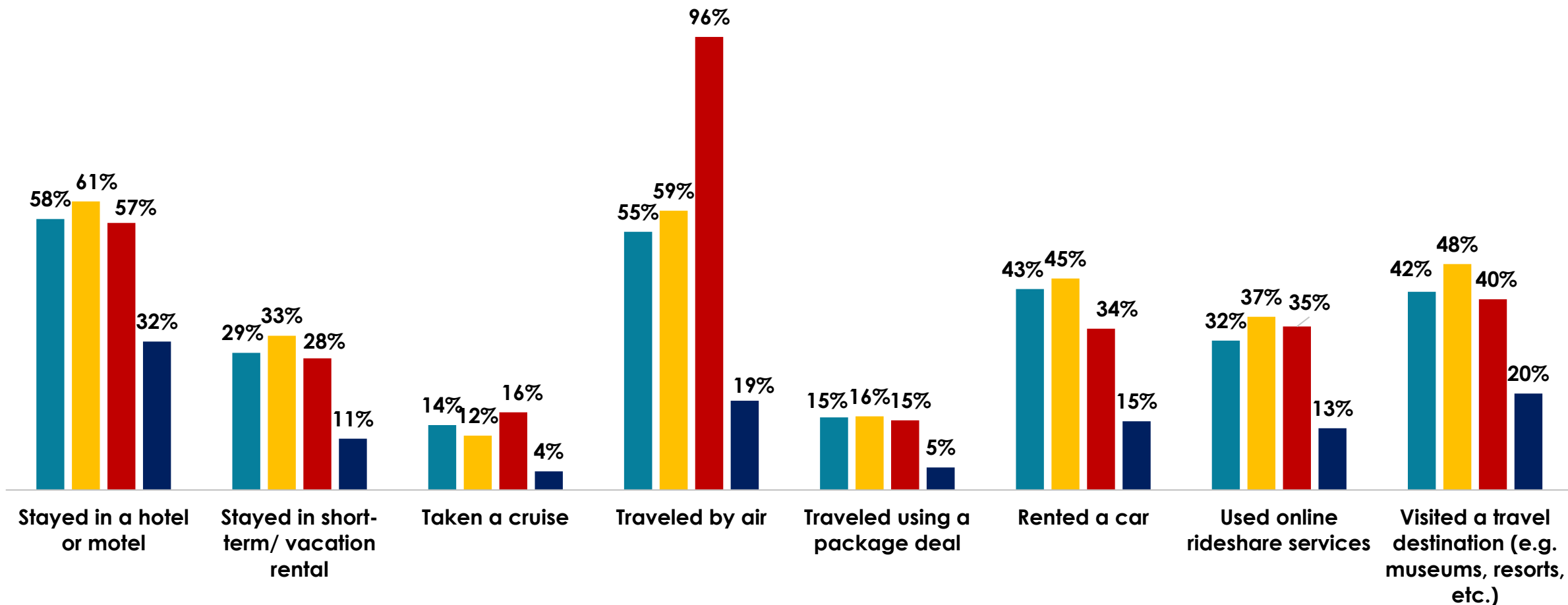
Leisure trip - activities in last 12 months

■ Avid Traveler \$100K+

■ Avid Traveler \$150K+

■ Long-Distance Air Traveler under 55

■ Nat Rep



Travel Mindset

■ Avid Traveler \$100K+
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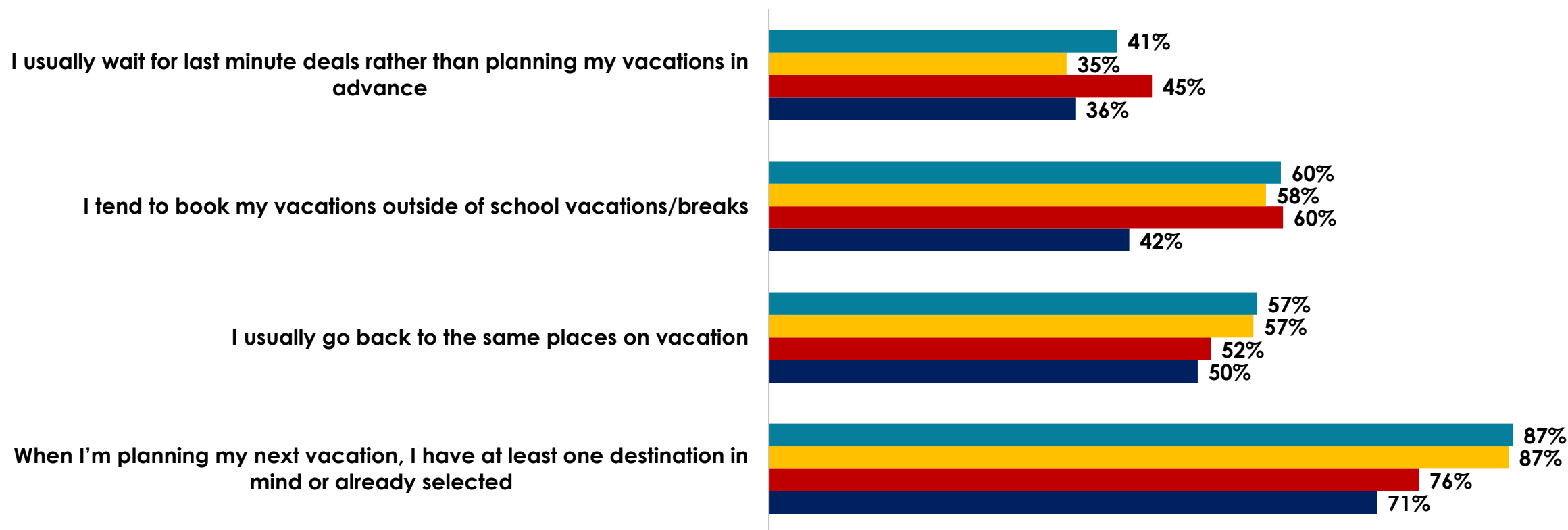
Travel Activities

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Booking & Spending Attitudes

■ Avid Traveler \$100K+
 ■ Avid Traveler \$150K+
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Booking & Spending Attitudes

