

COVID-19 Impact on U.S. Avid Travelers

An HVCB analysis of YouGov data provided by HTA as of April 3, 2022

Reported on April 21, 2022



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)

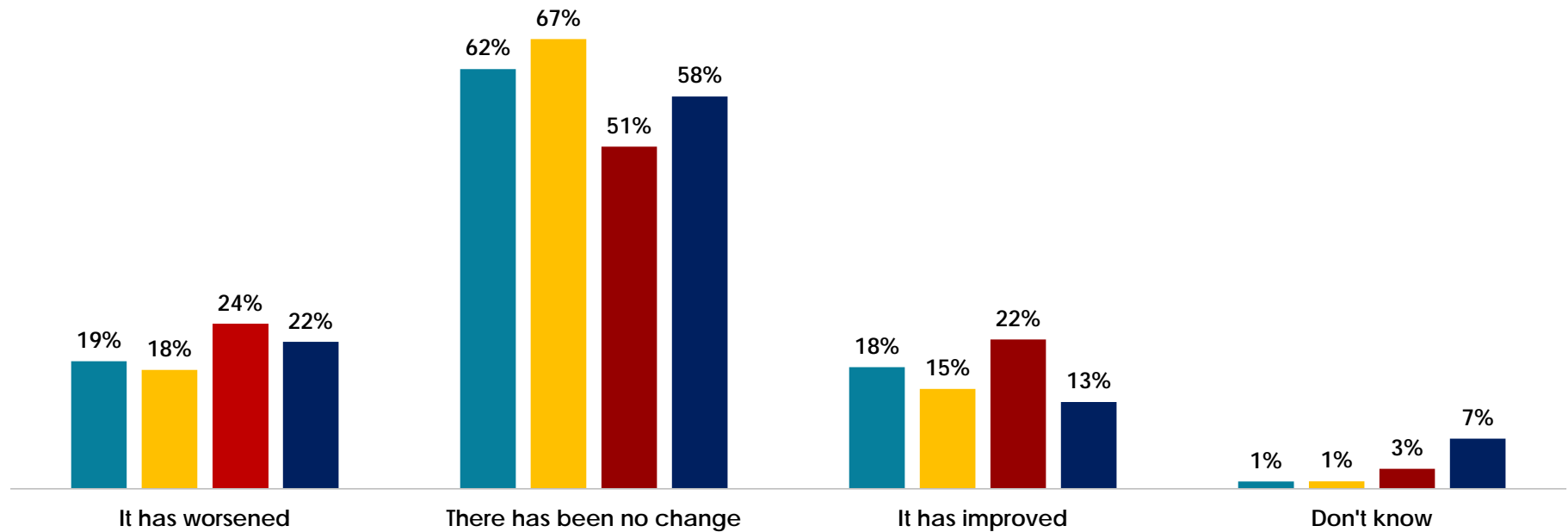
- Representative of U.S. adults in terms of age, gender, social class and education



Travelers' Pandemic Outlook

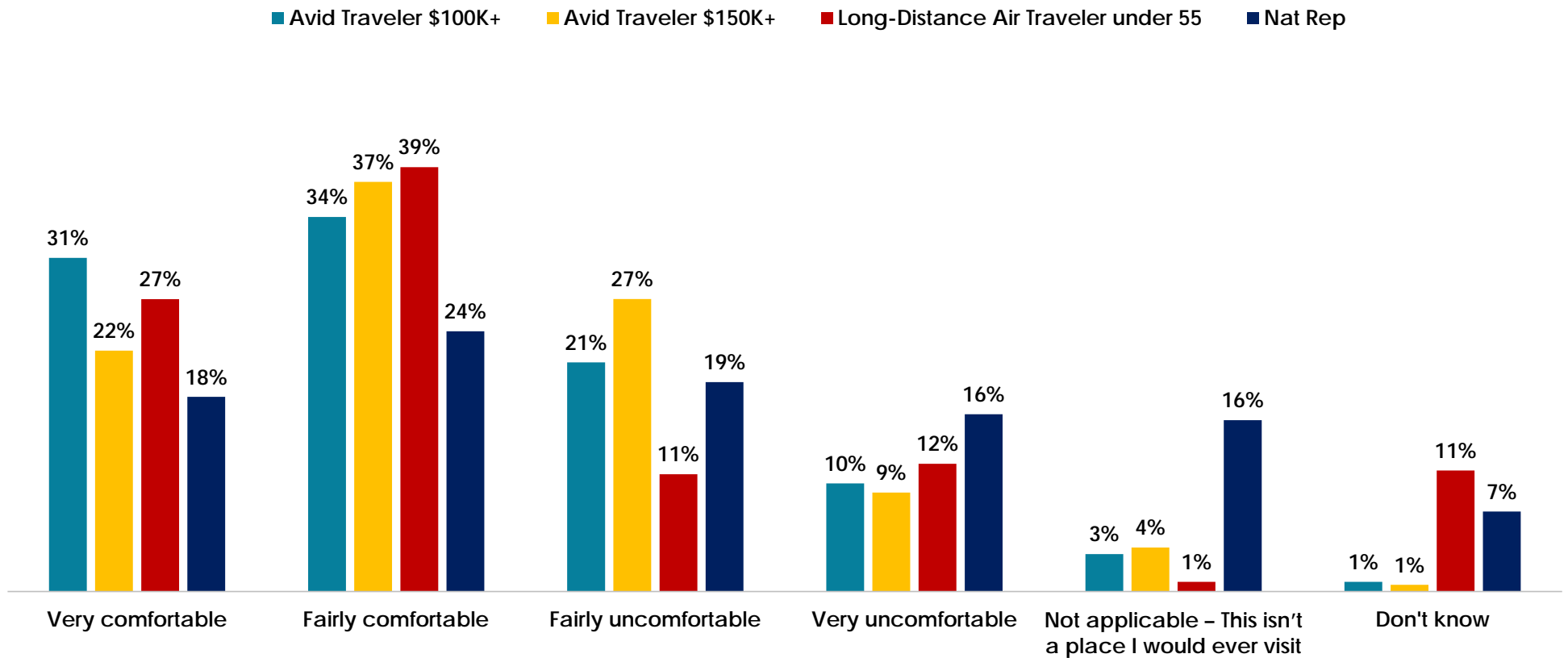
How has your household economic situation changed in the past month?

■ 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 April 3, 2022

Level of comfort visiting an airport right now



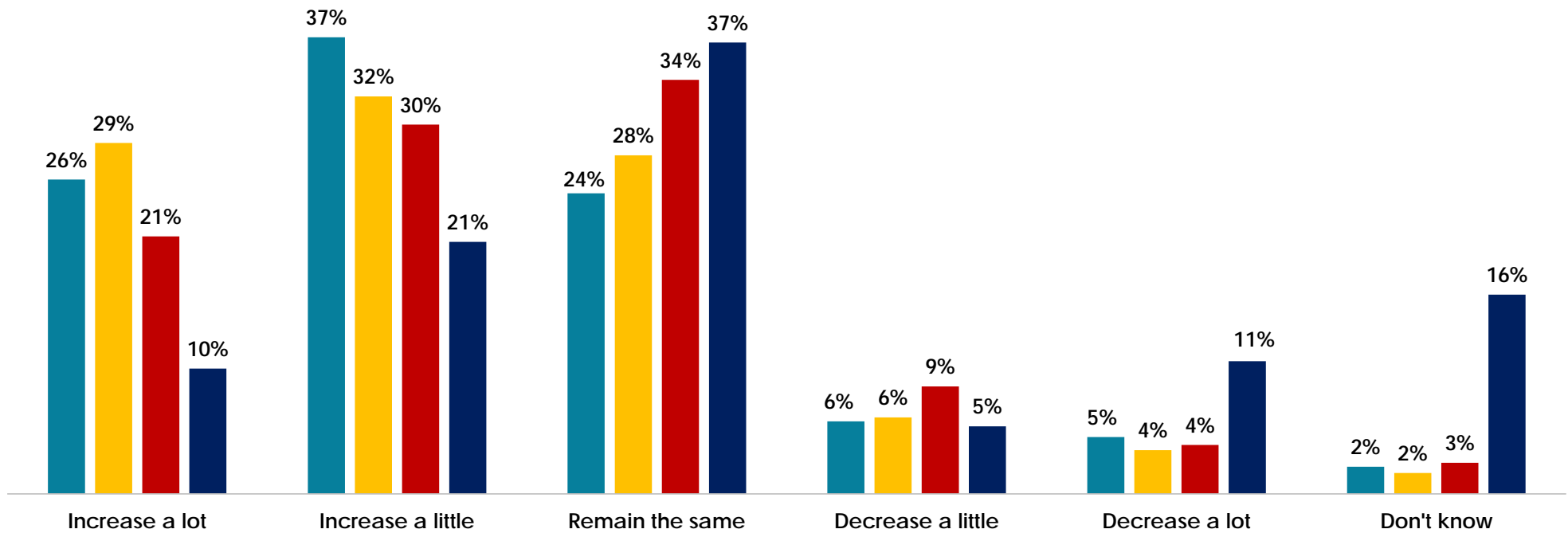
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Future Travel Plans

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

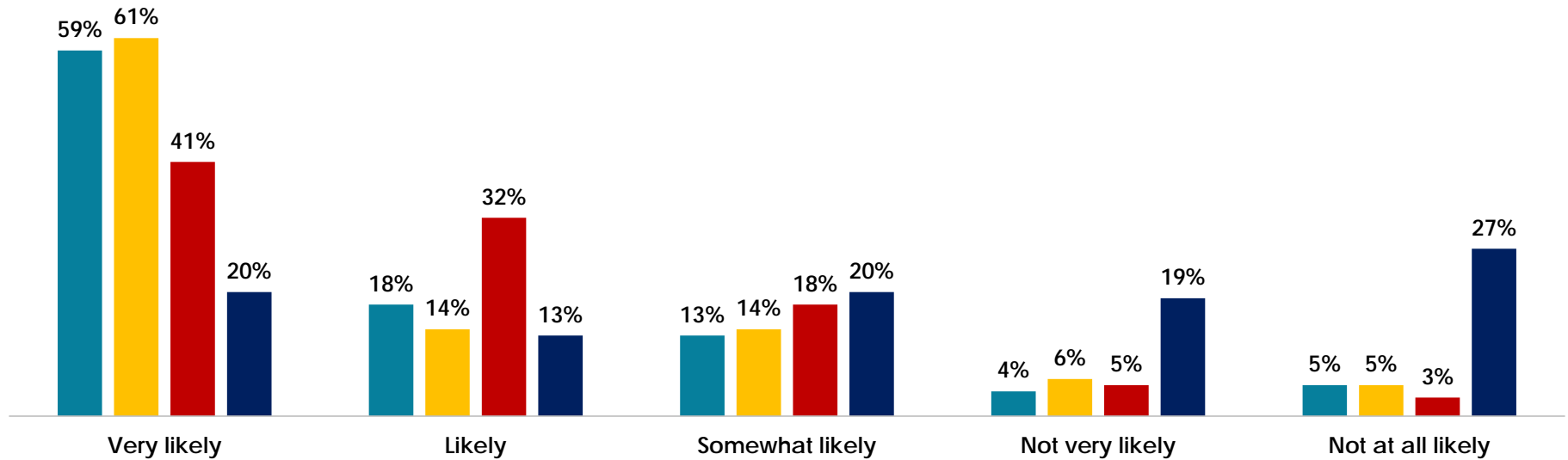
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Future Travel – Likelihood of purchasing travel or leisure services in the next 12 months

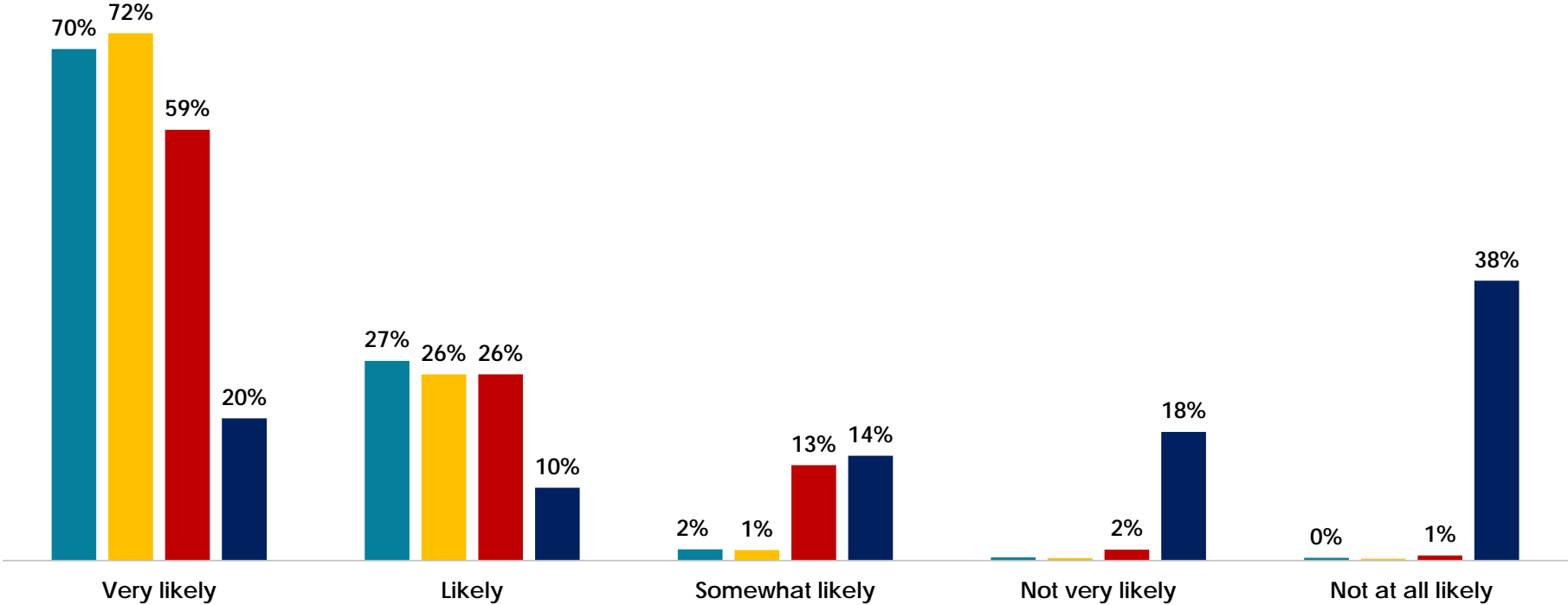
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Future Travel – Likelihood of booking a flight in the next 12 months

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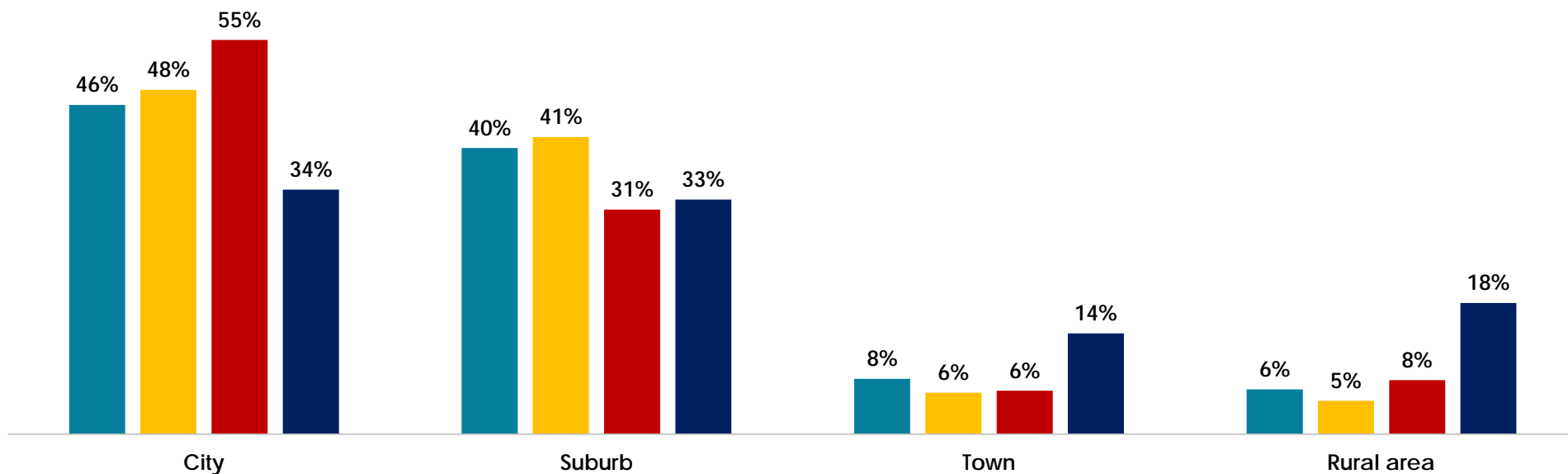


Traveler Profiles

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

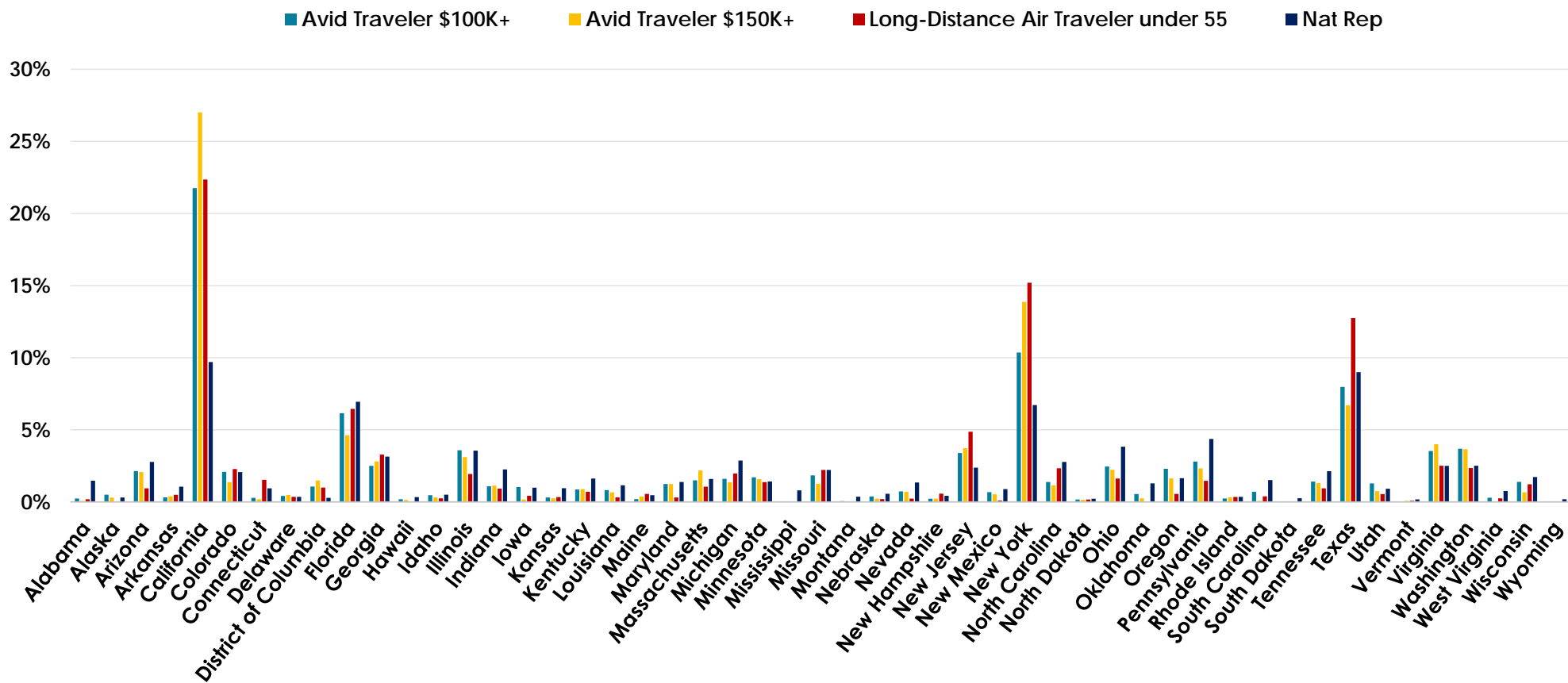
Type of Area Living In

■ Avid Traveler \$100K+
 ■ Avid Traveler \$150K+
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State of Residence



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Top 10 States of Residence by Segment

Avid Traveler \$100K, 25-54, individual

California	21.8%
New York	10.4%
Texas	8.0%
Florida	6.2%
Washington	3.7%
Illinois	3.6%
Virginia	3.5%
New Jersey	3.4%
Pennsylvania	2.8%
Georgia	2.5%

Avid Traveler \$150K, 25-54, 2+ household

California	27.0%
New York	13.9%
Texas	6.7%
Florida	4.6%
Virginia	4.0%
New Jersey	3.7%
Washington	3.6%
Illinois	3.1%
Georgia	2.8%
Pennsylvania	2.3%

Long-Distance Air Traveler under 55

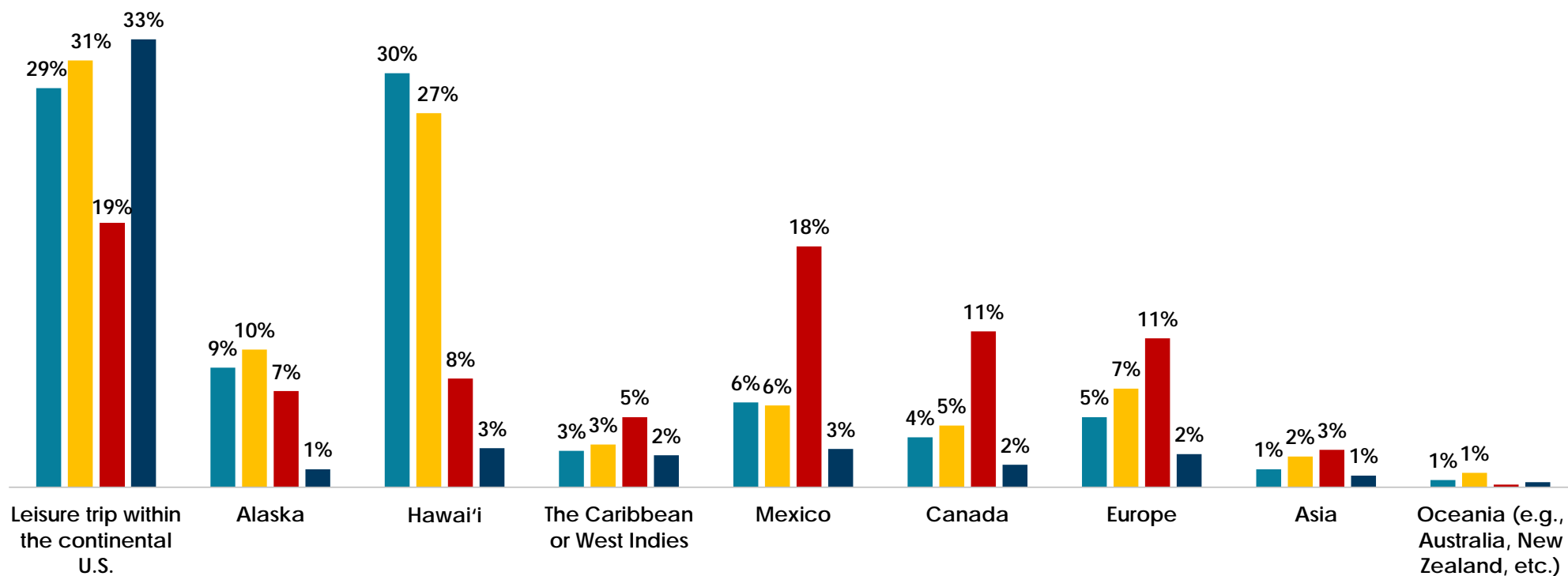
California	22.4%
New York	15.2%
Texas	12.7%
Florida	6.4%
New Jersey	4.9%
Georgia	3.3%
Virginia	2.5%
Washington	2.3%
North Carolina	2.3%
Colorado	2.3%

Nat Rep

California	9.7%
Texas	9.0%
Florida	6.9%
New York	6.7%
Pennsylvania	4.4%
Ohio	3.8%
Illinois	3.5%
Georgia	3.1%
Michigan	2.9%
Arizona	2.8%

Leisure trip – most recent destination

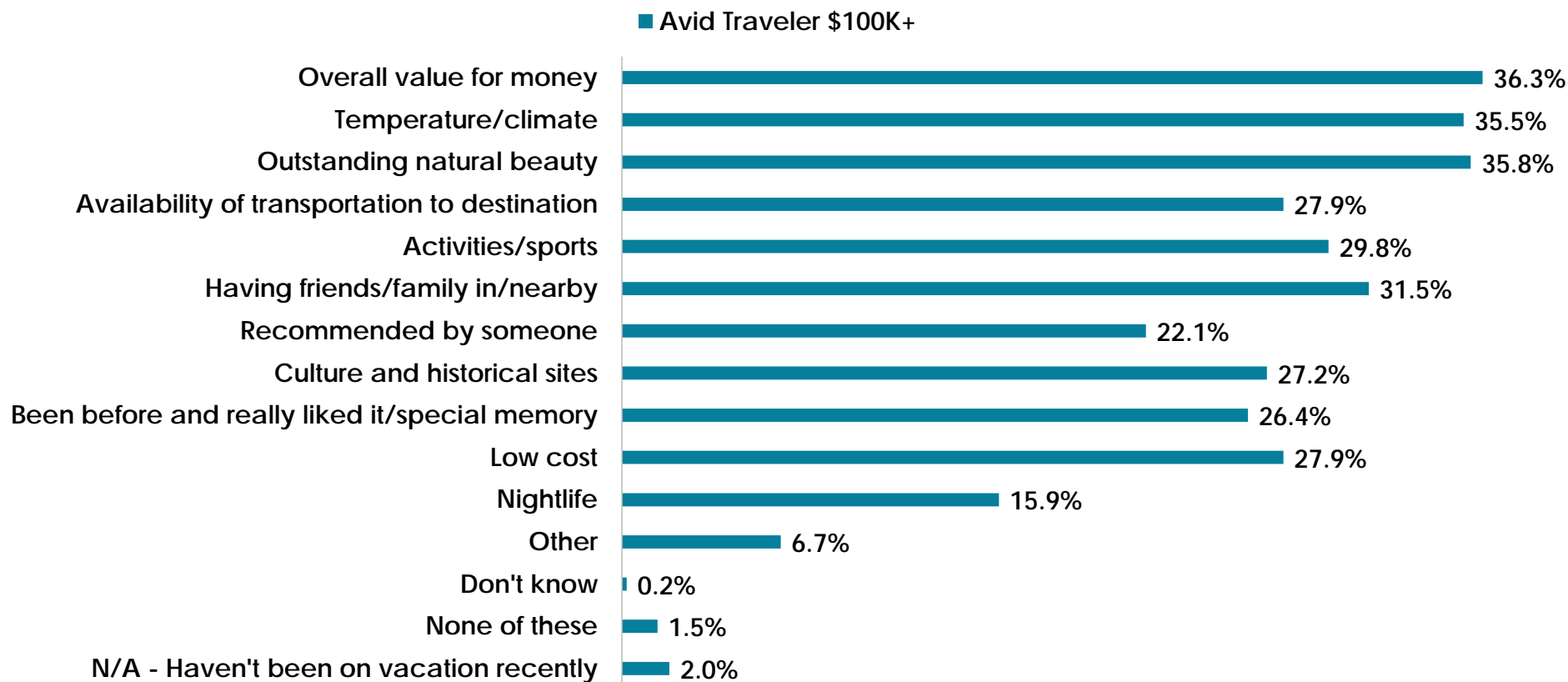
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Reason for choosing most recent leisure destination

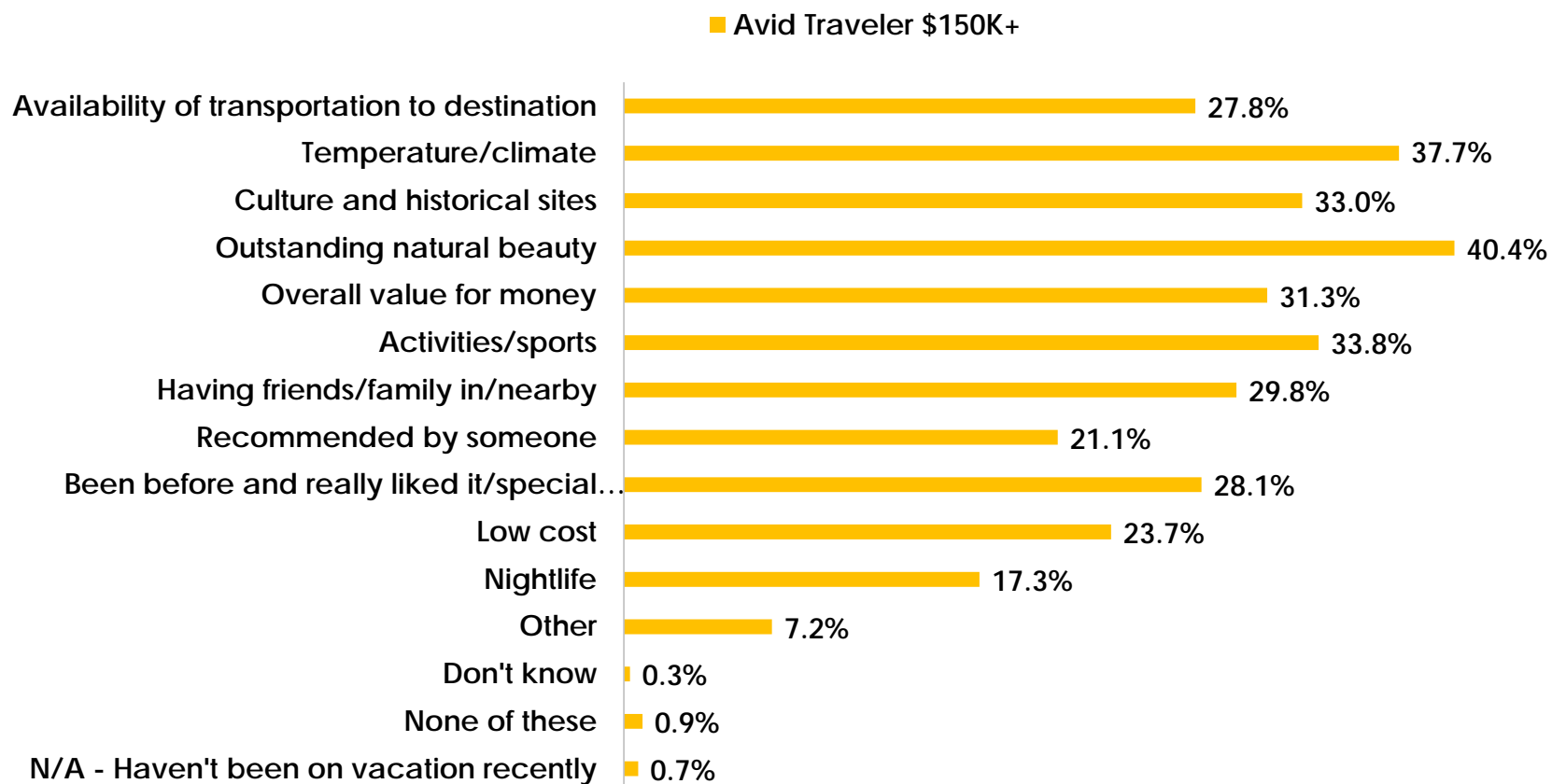
Reasons	Avid Traveler \$100K, 25-54, individual	Avid Traveler \$150K, 25-54, 2+ household	Long-Distance Air Traveler under 55	Nat Rep
The temperature/climate	35.5%	37.7%	37.5%	23.8%
Availability of transportation to destination	27.9%	27.8%	29.3%	14.4%
Culture and historical sites	27.2%	33.0%	27.8%	18.4%
Overall value for money	36.3%	31.3%	32.6%	31.1%
Activities/sports	29.8%	33.8%	30.1%	16.5%
Outstanding natural beauty	35.8%	40.4%	32.6%	24.0%
Nightlife	15.9%	17.3%	25.7%	8.6%
Having friends/family in/nearby	31.5%	29.8%	36.8%	24.8%
Low cost	27.9%	23.7%	30.5%	23.7%
Been before and really liked it/special memory	26.4%	28.1%	28.0%	19.2%
Recommended by someone	22.1%	21.1%	34.5%	14.1%
Other	6.7%	7.2%	5.7%	6.5%
Don't know	0.2%	0.3%	0.4%	2.0%
None of these	1.5%	0.9%	0.5%	2.3%
N/A - Haven't been on vacation recently	2.0%	0.7%	2.2%	23.9%

Reason for choosing most recent leisure destination

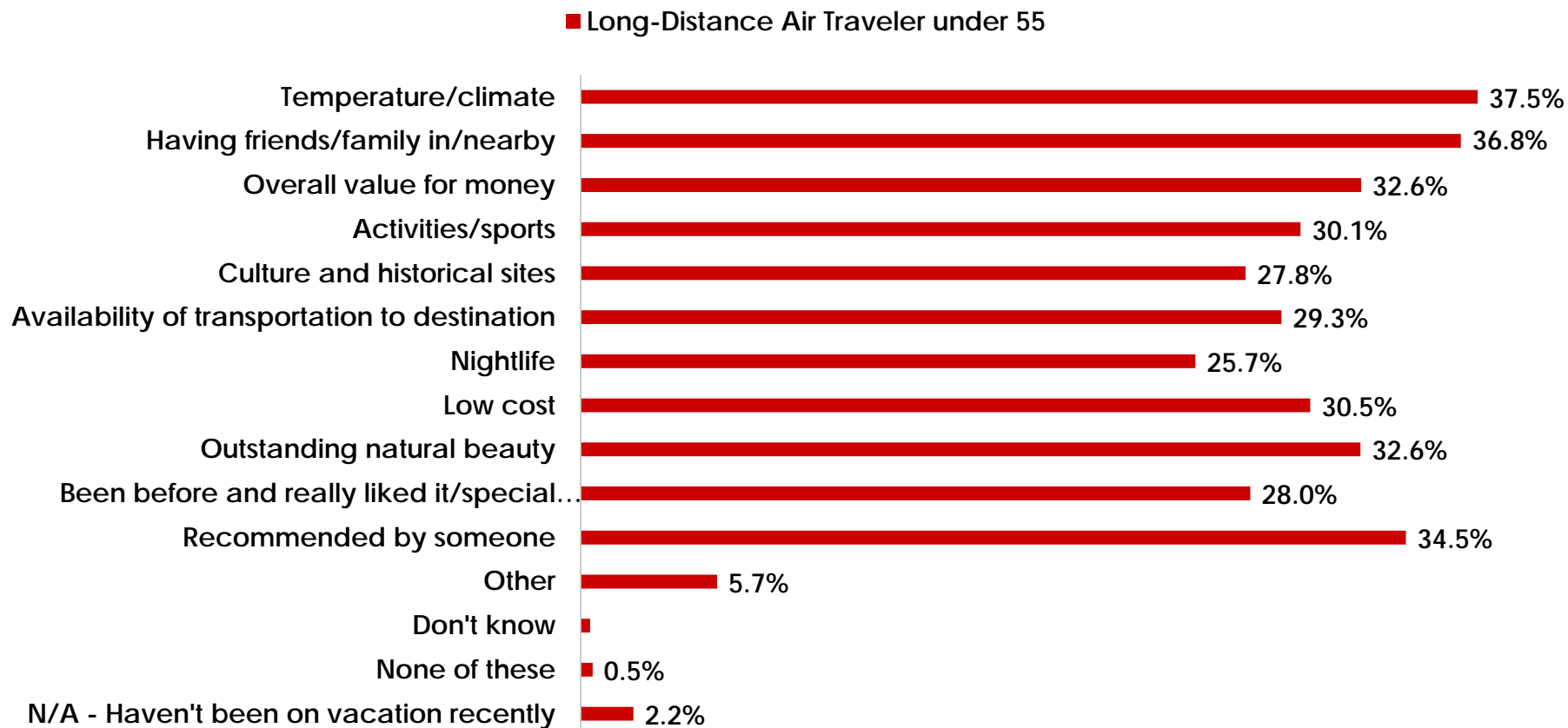


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Reason for choosing most recent leisure destination

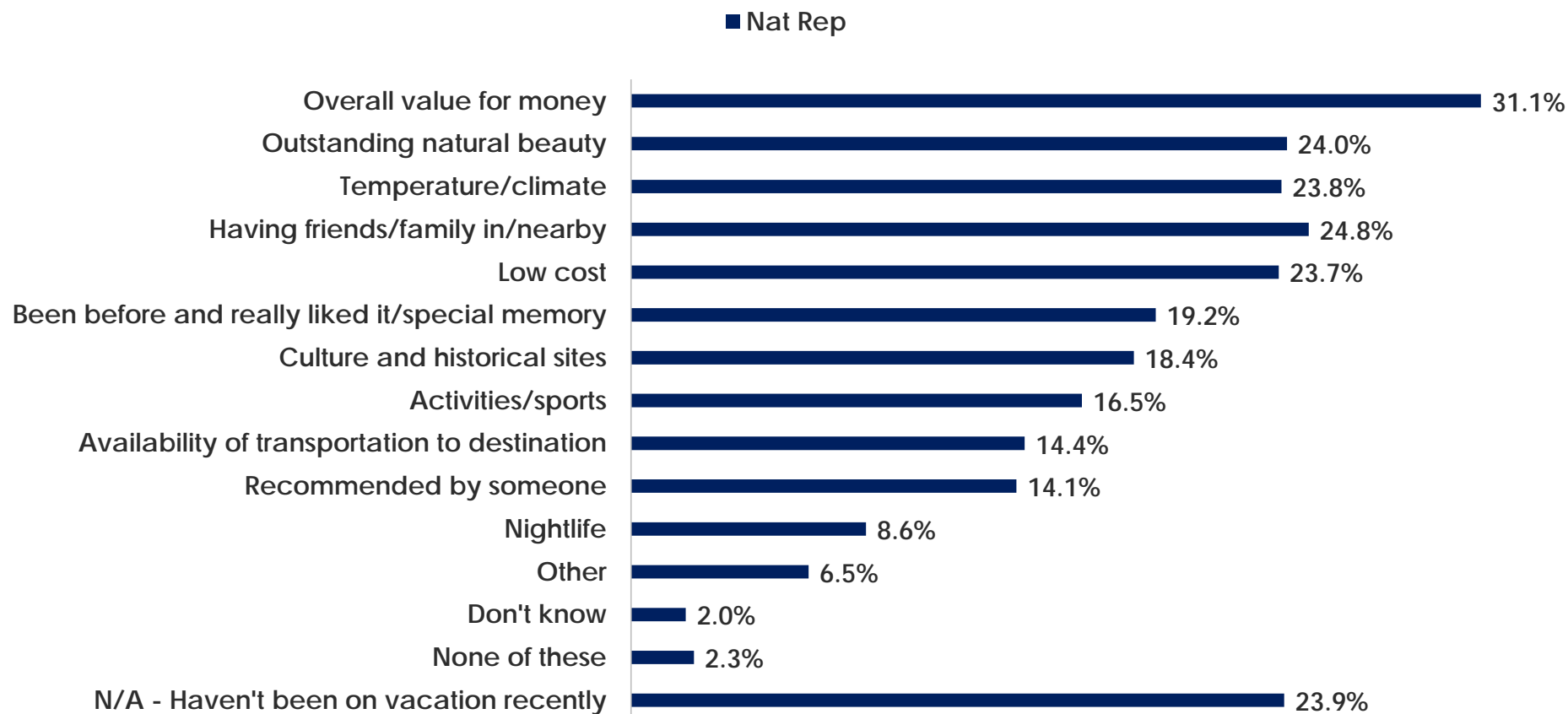


Reason for choosing most recent leisure destination



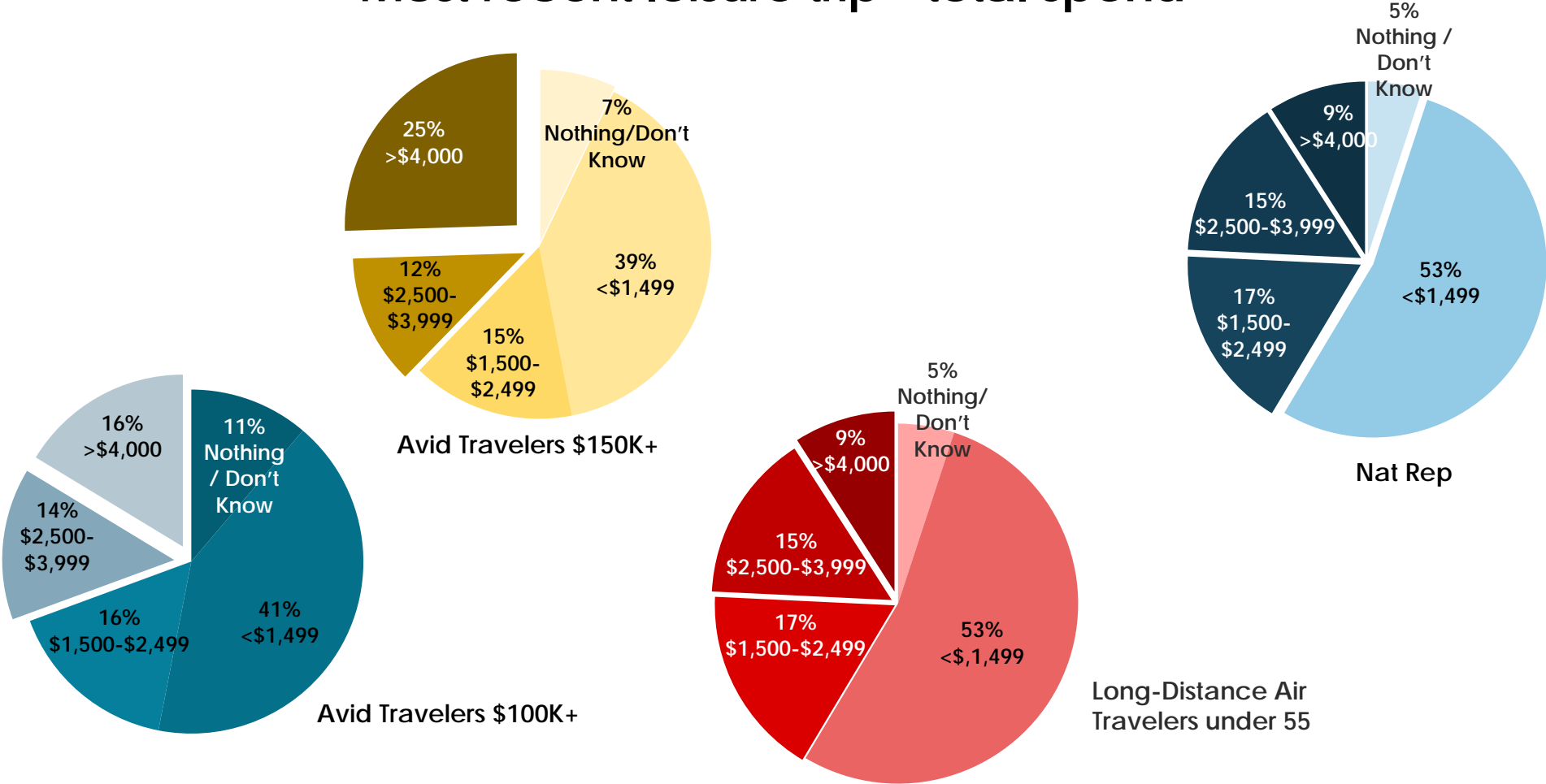
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Reason for choosing most recent leisure destination



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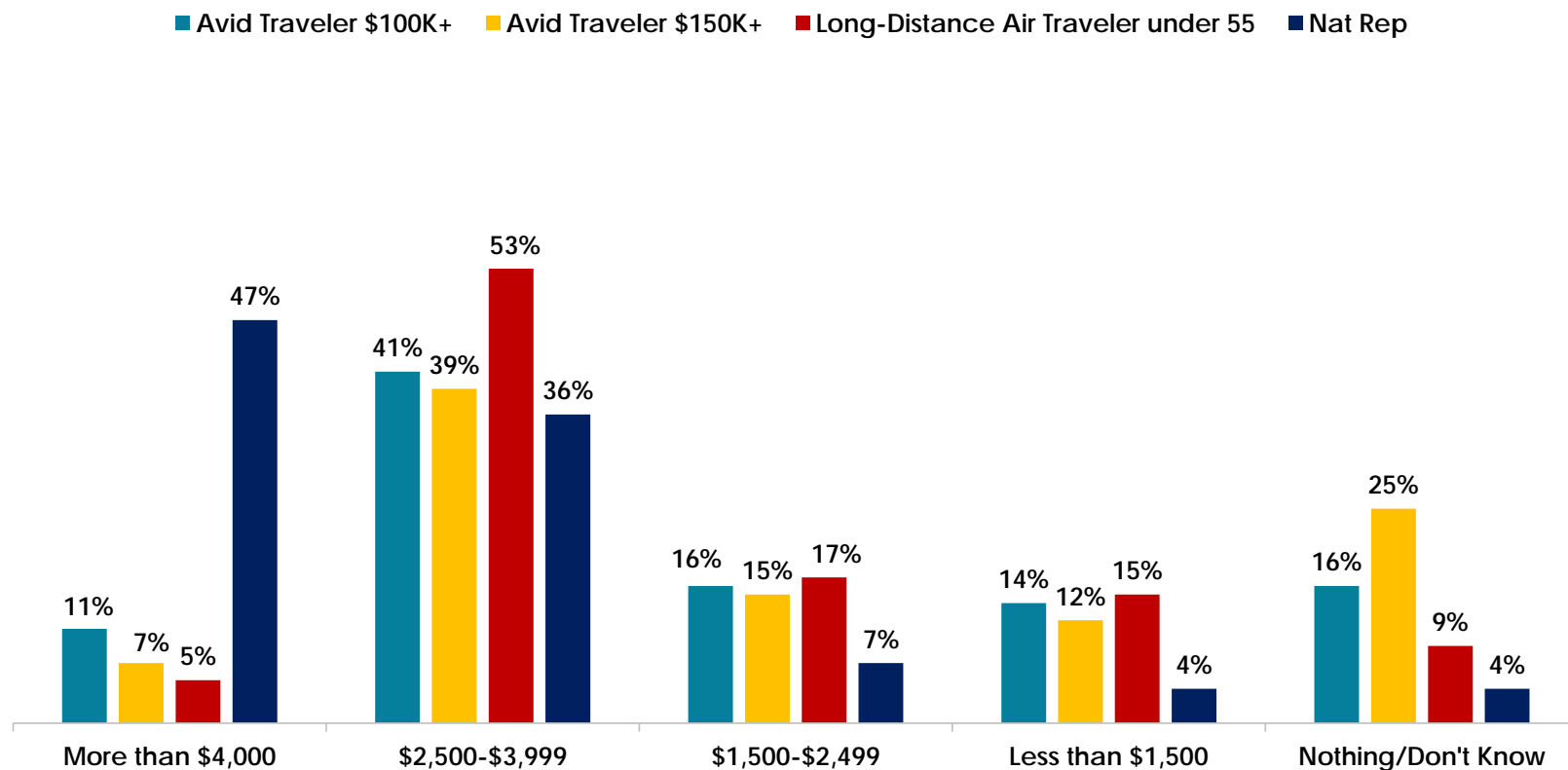
Most recent leisure trip - total spend



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

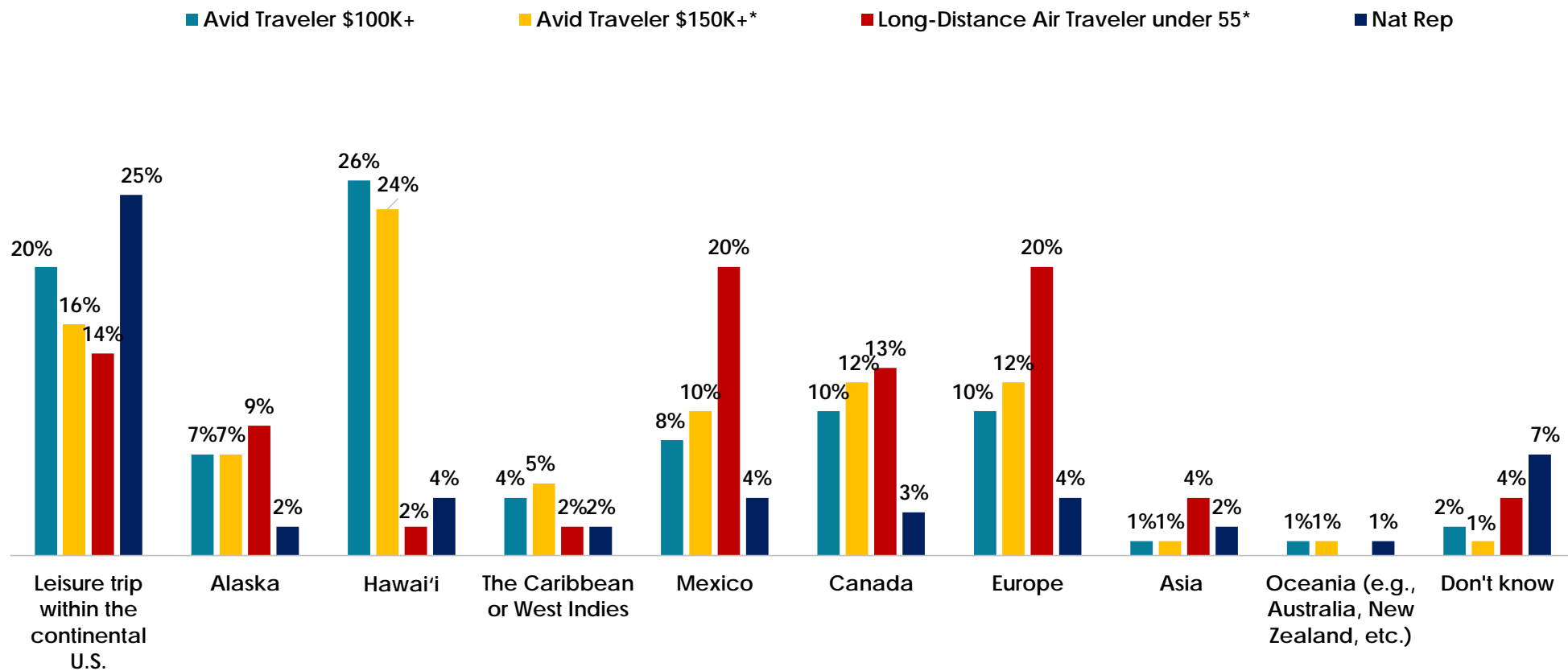
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Most recent leisure trip - total spend



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Leisure trip - next destination

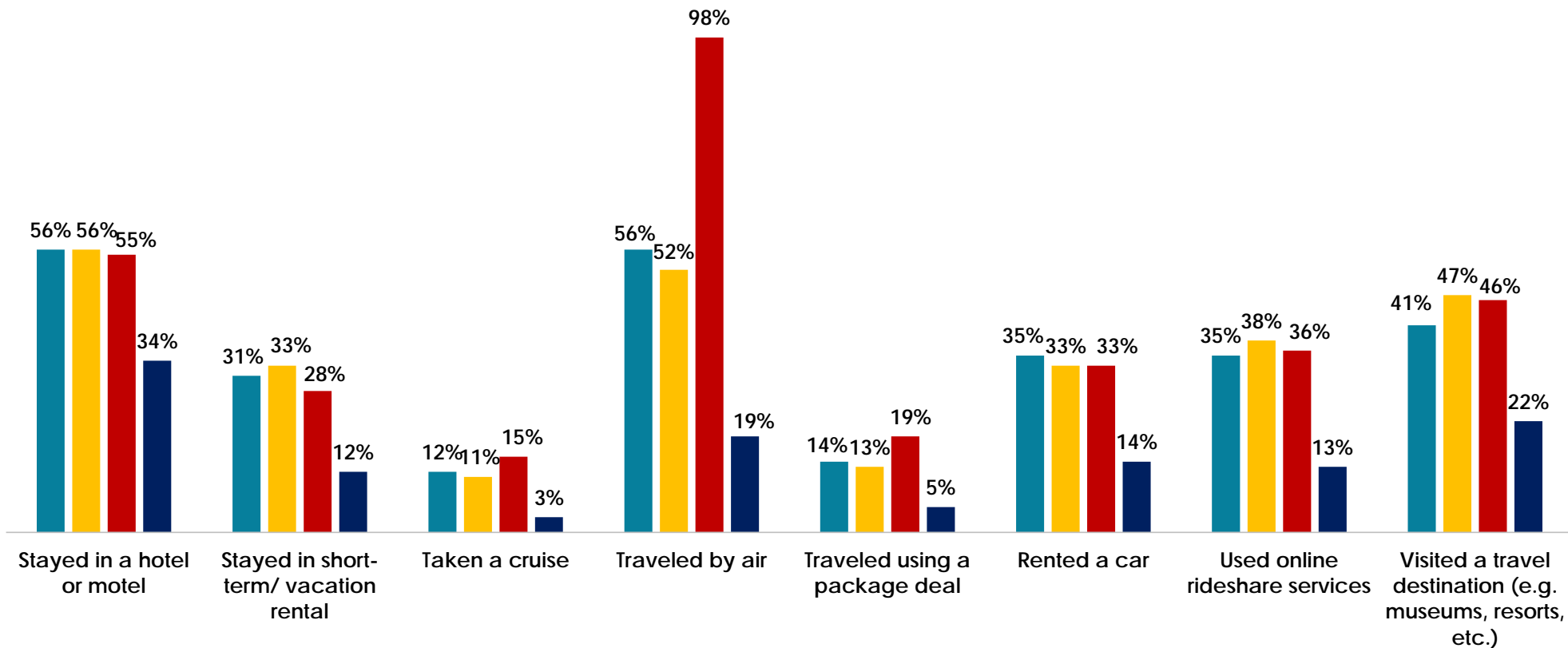


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Leisure trip - activities in last 12 months

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Travel Mindset

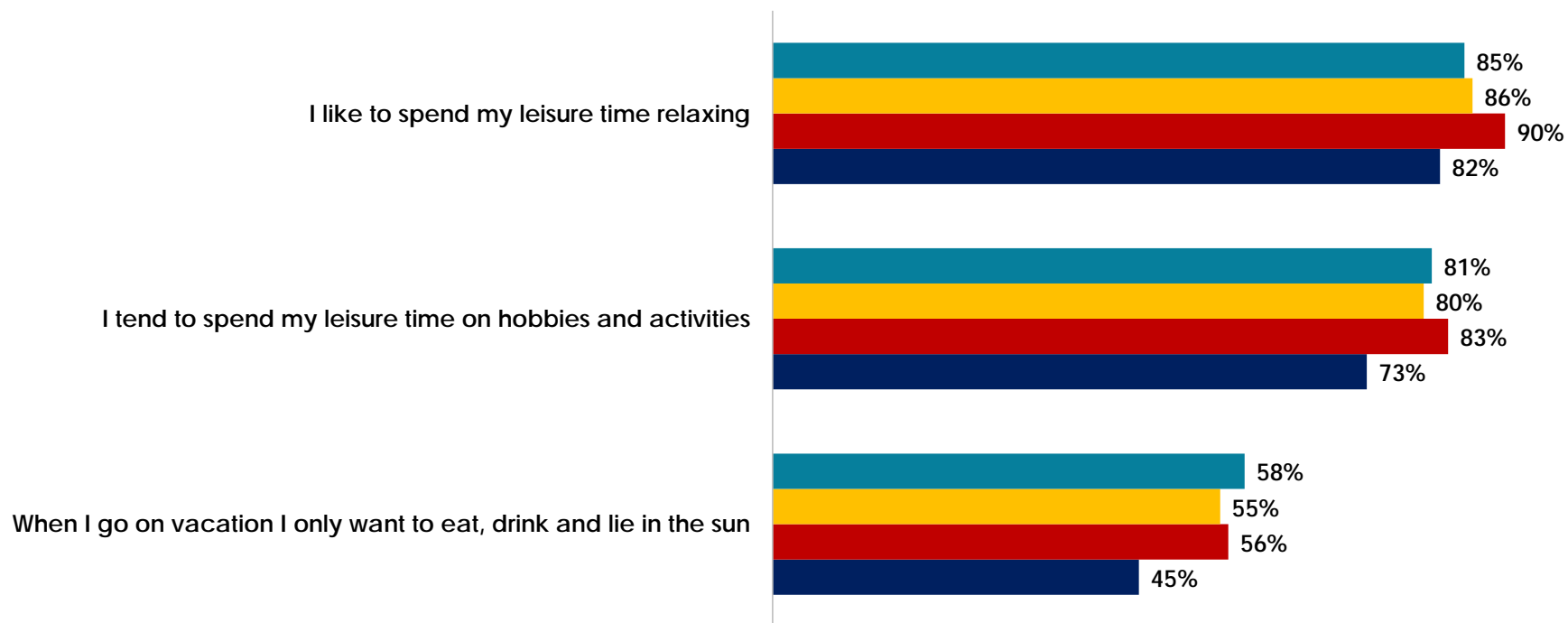
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Travel Activities

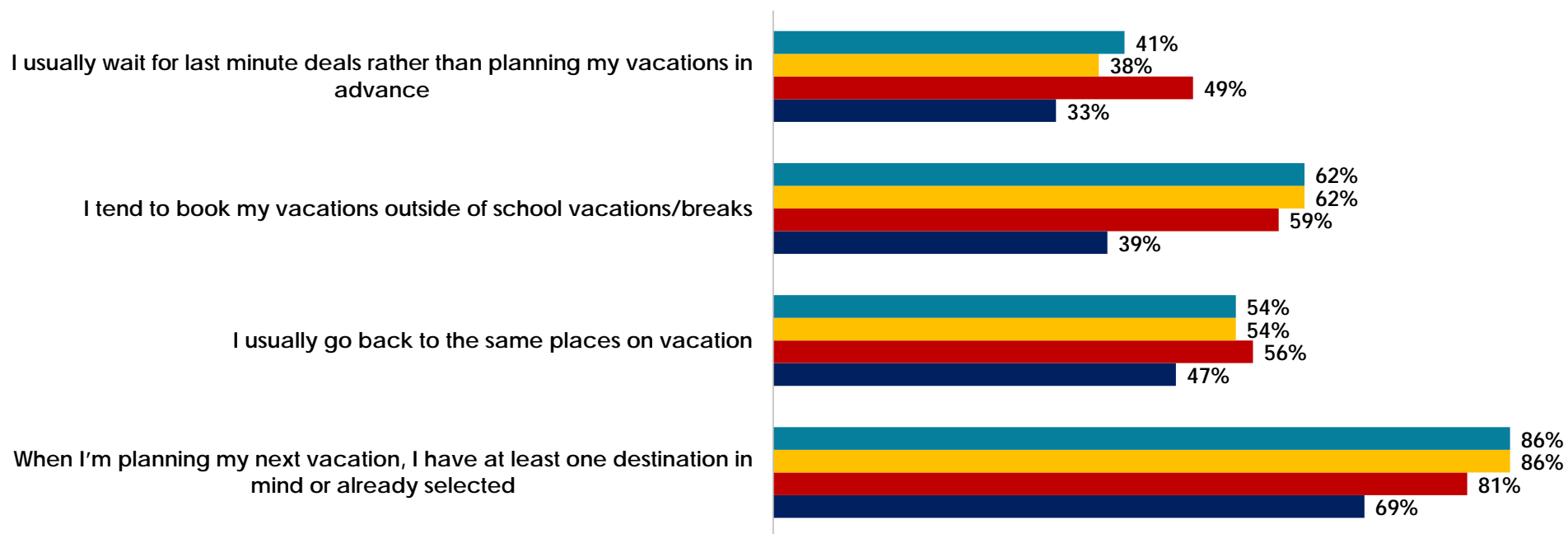
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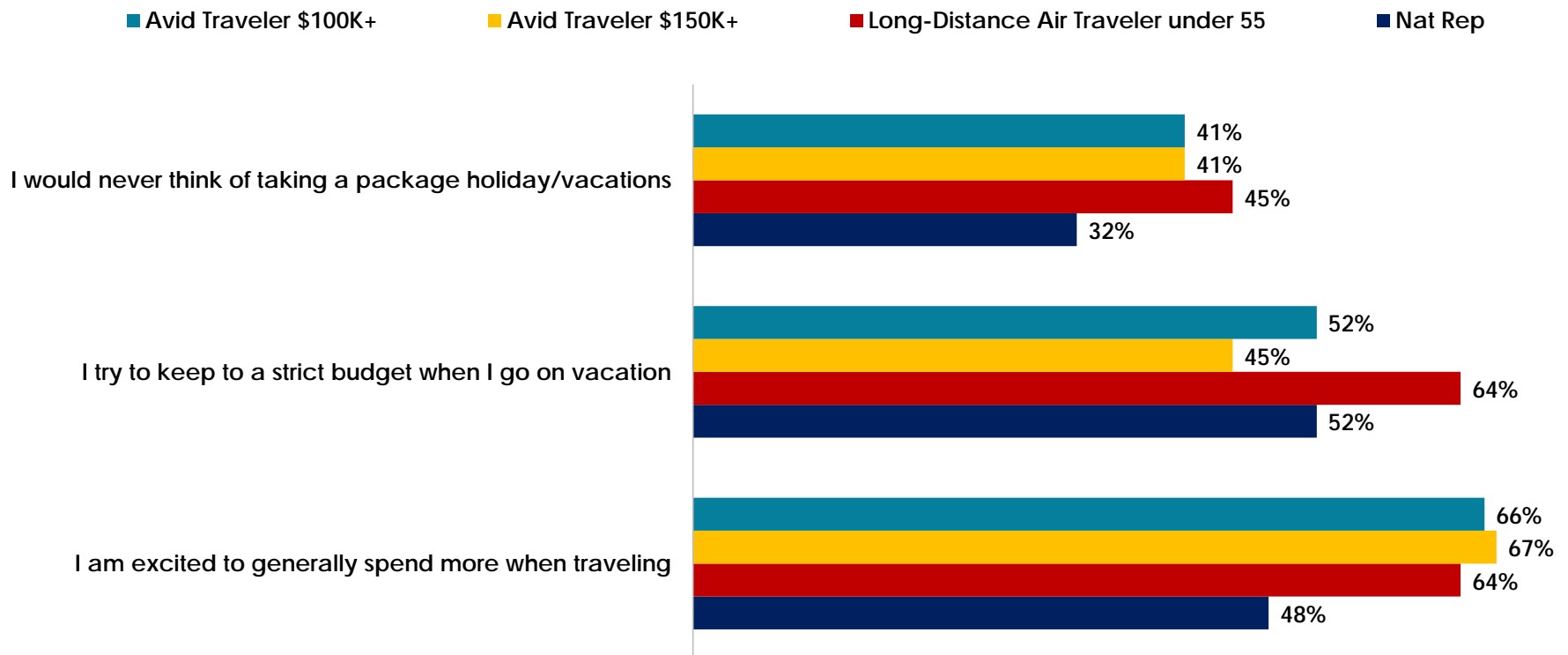
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Booking & Spending Attitudes

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