

COVID-19 Impact on U.S. Avid Travelers

An HVCB analysis of YouGov data provided by HTA as of May 8, 2022

Reported on May 19, 2022

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)

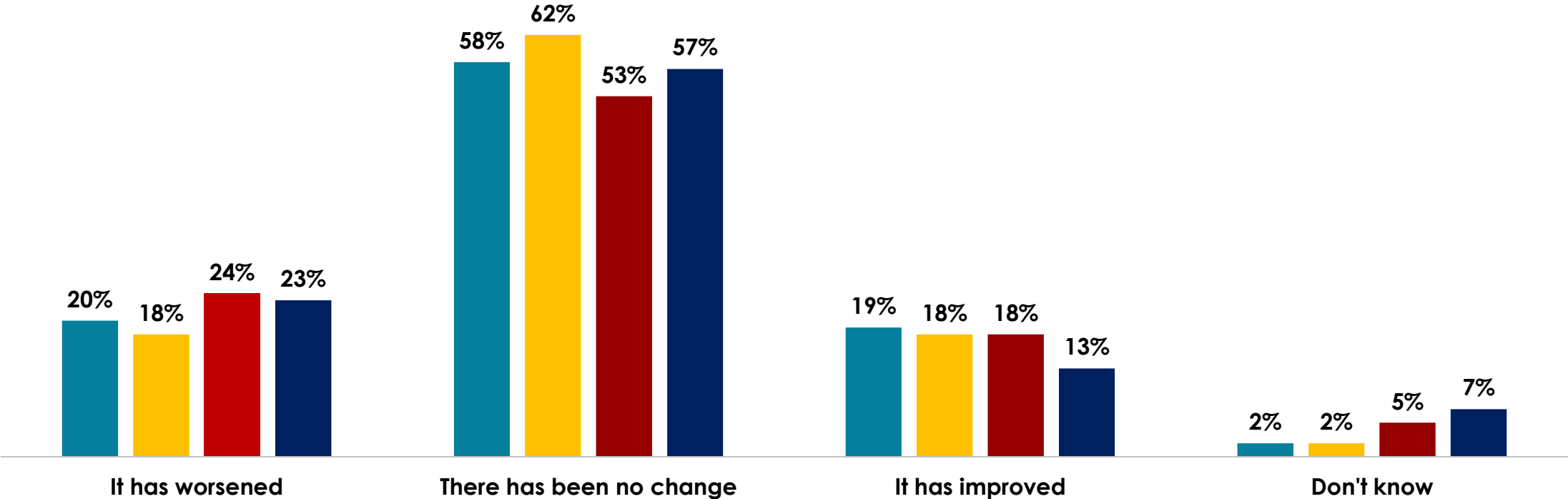
- Representative of U.S. adults in terms of age, gender, social class and education



Travelers' Pandemic Outlook

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

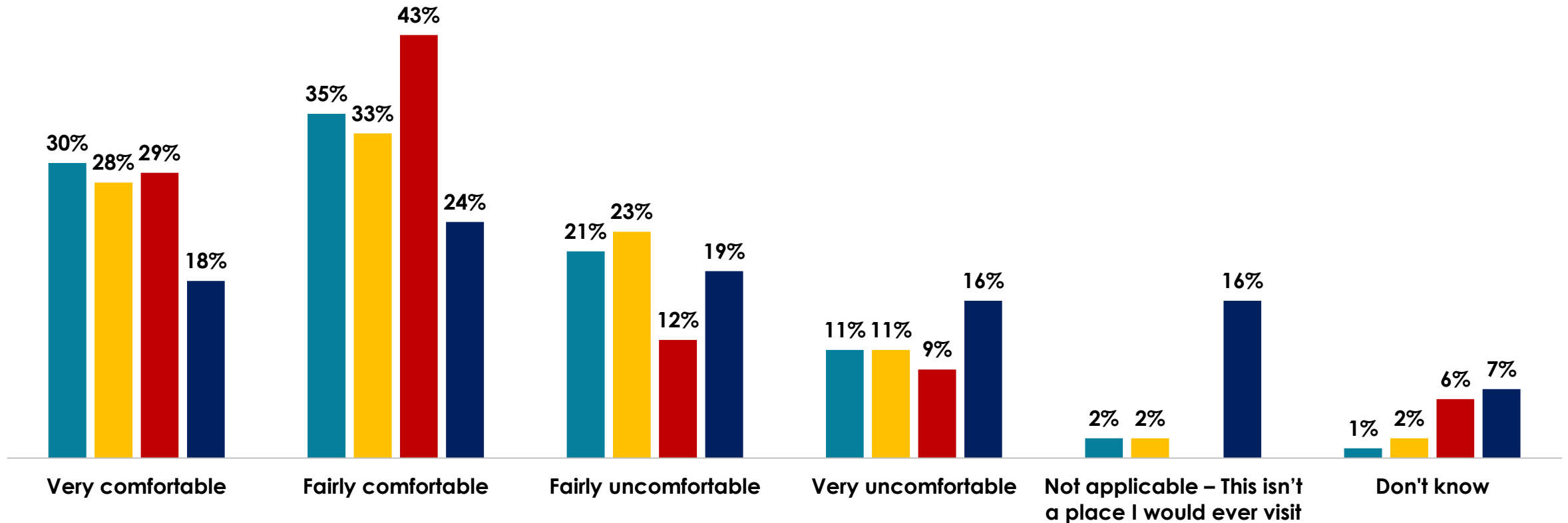
■ Avid Traveler \$100K+ ■ Avid Traveler \$150K+ ■ Long-Distance Air Traveler under 55 ■ Nat Rep



Source: HVCB analysis of YouGov data provided by HTA as of May 8, 2022

Level of comfort visiting an airport right now

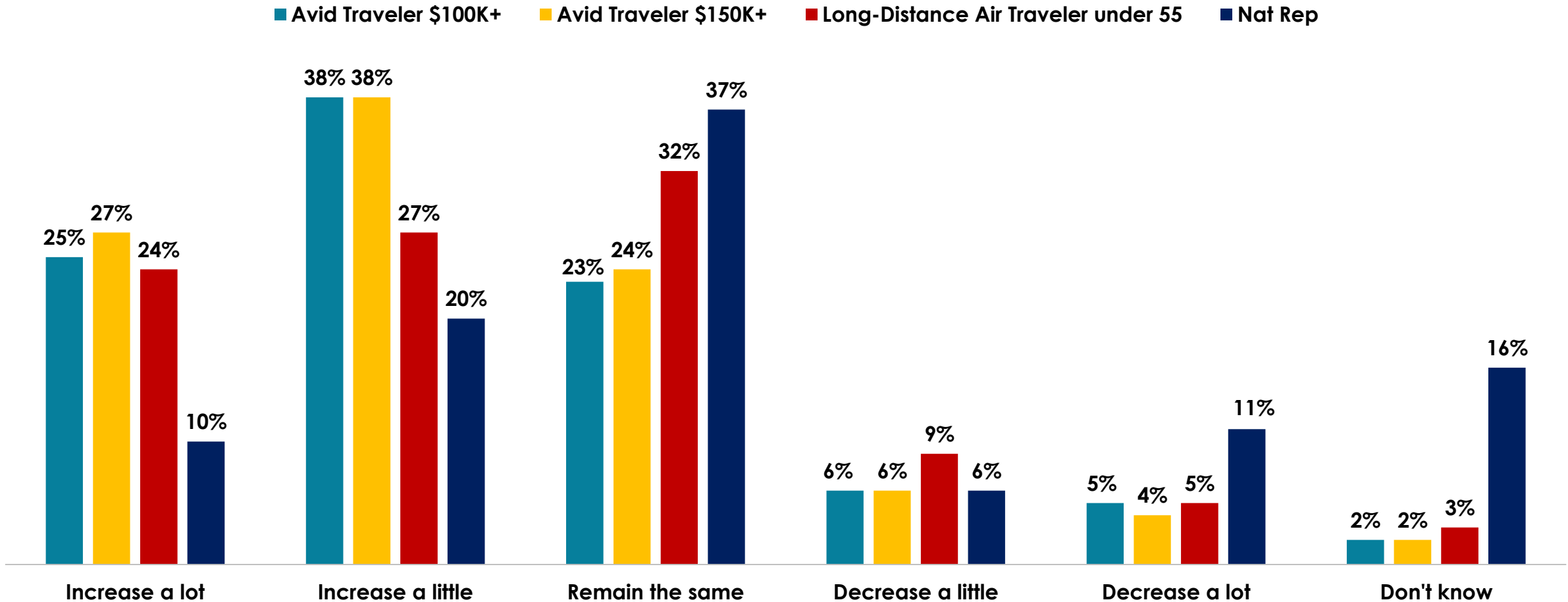
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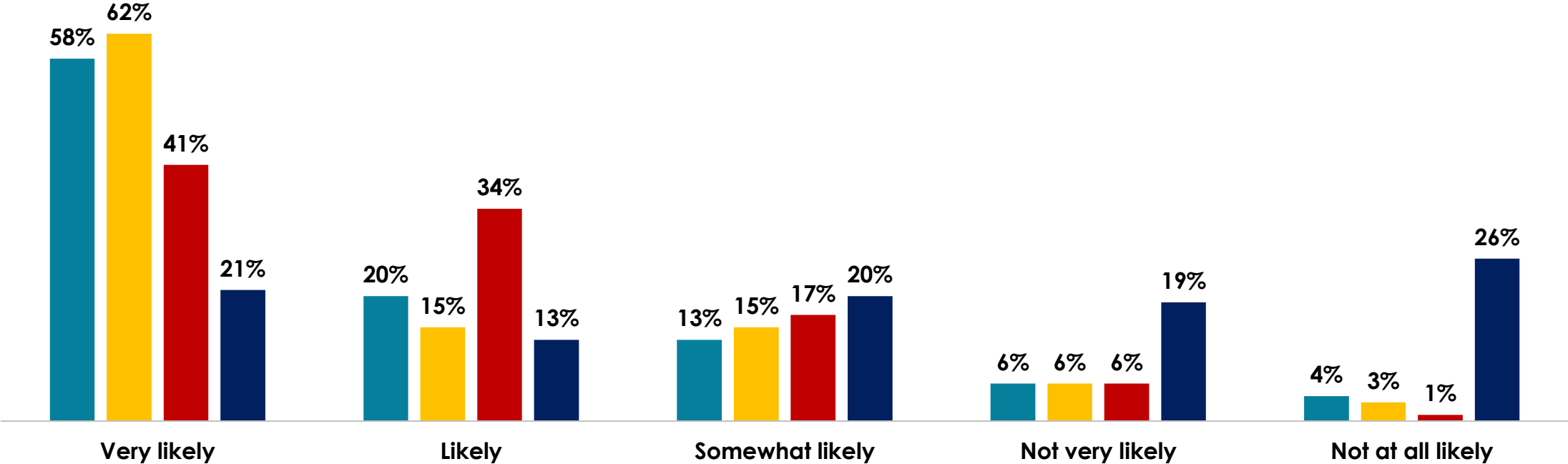
Future Travel Plans

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



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

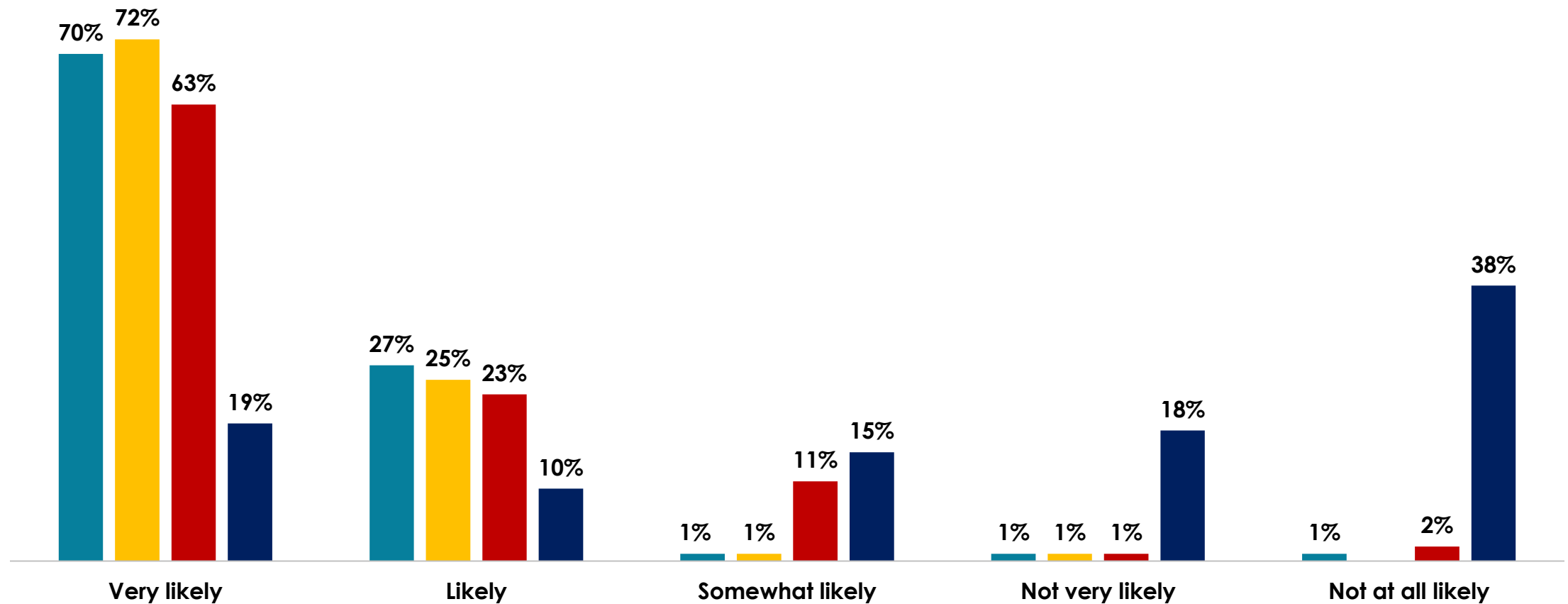
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Future Travel – Likelihood of booking a flight in the next 12 months

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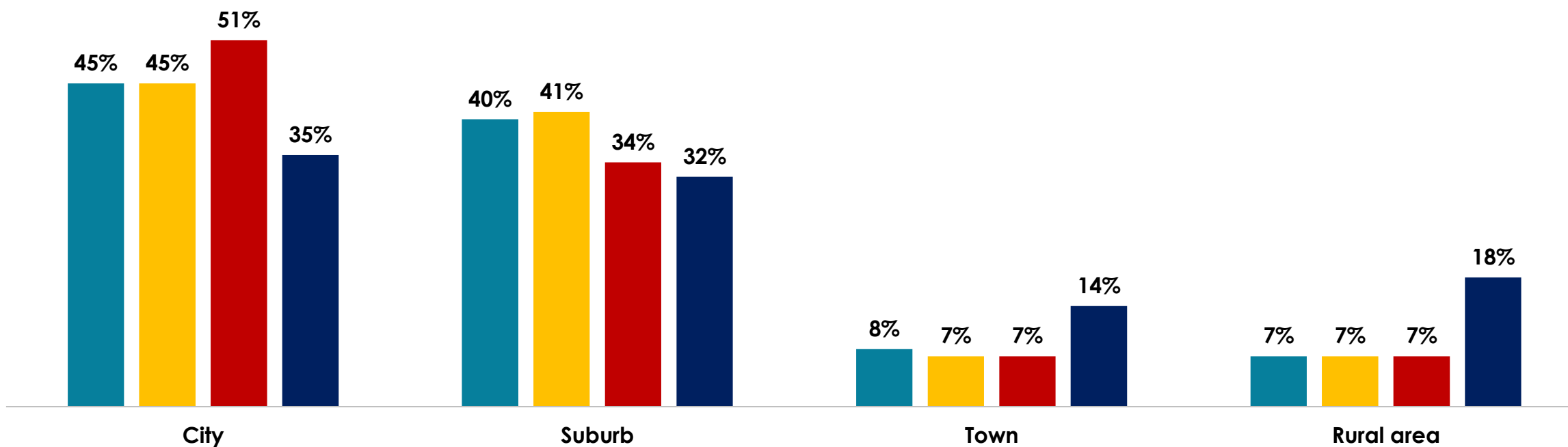


Traveler Profiles

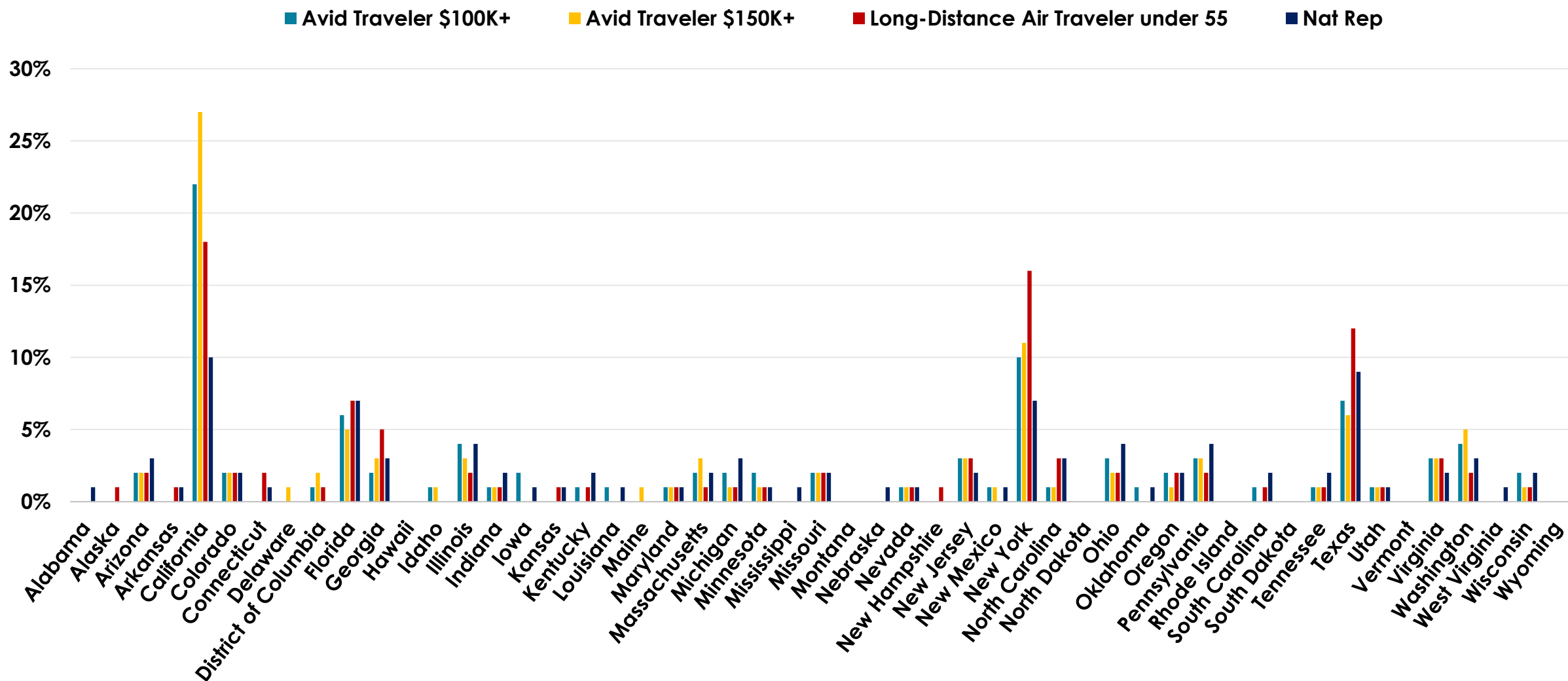
Avid Travelers vs. Long-Distance Air Travelers vs. Nat. Rep.

Type of Area Living In

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



State of Residence



Top 10 States of Residence by Segment

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

California	21.8%
New York	9.6%
Texas	7.3%
Florida	5.8%
Illinois	4.0%
Washington	4.0%
Virginia	3.3%
New Jersey	3.1%
Ohio	2.7%
Pennsylvania	2.5%

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

California	27.1%
New York	11.3%
Texas	5.9%
Washington	4.7%
Florida	4.7%
Georgia	3.3%
New Jersey	3.1%
Virginia	3.1%
Illinois	3.0%
Pennsylvania	2.7%

Long-Distance Air Traveler under 55

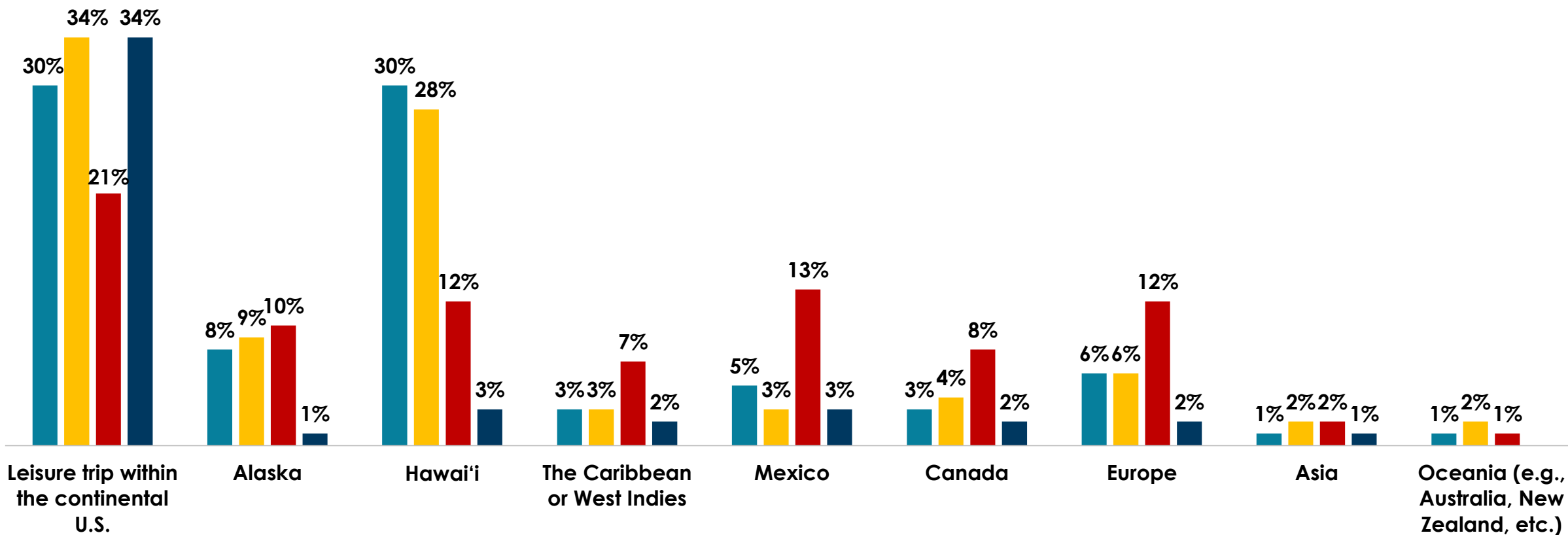
California	18.5%
New York	15.7%
Texas	11.7%
Florida	6.8%
Georgia	5.3%
New Jersey	3.2%
Virginia	2.9%
North Carolina	2.5%
Washington	2.4%
Oregon	2.1%

Nat Rep

California	9.9%
Texas	8.9%
Florida	7.1%
New York	6.9%
Pennsylvania	4.2%
Ohio	3.9%
Illinois	3.6%
Georgia	3.0%
Michigan	2.8%
Arizona	2.8%

Leisure trip – most recent destination

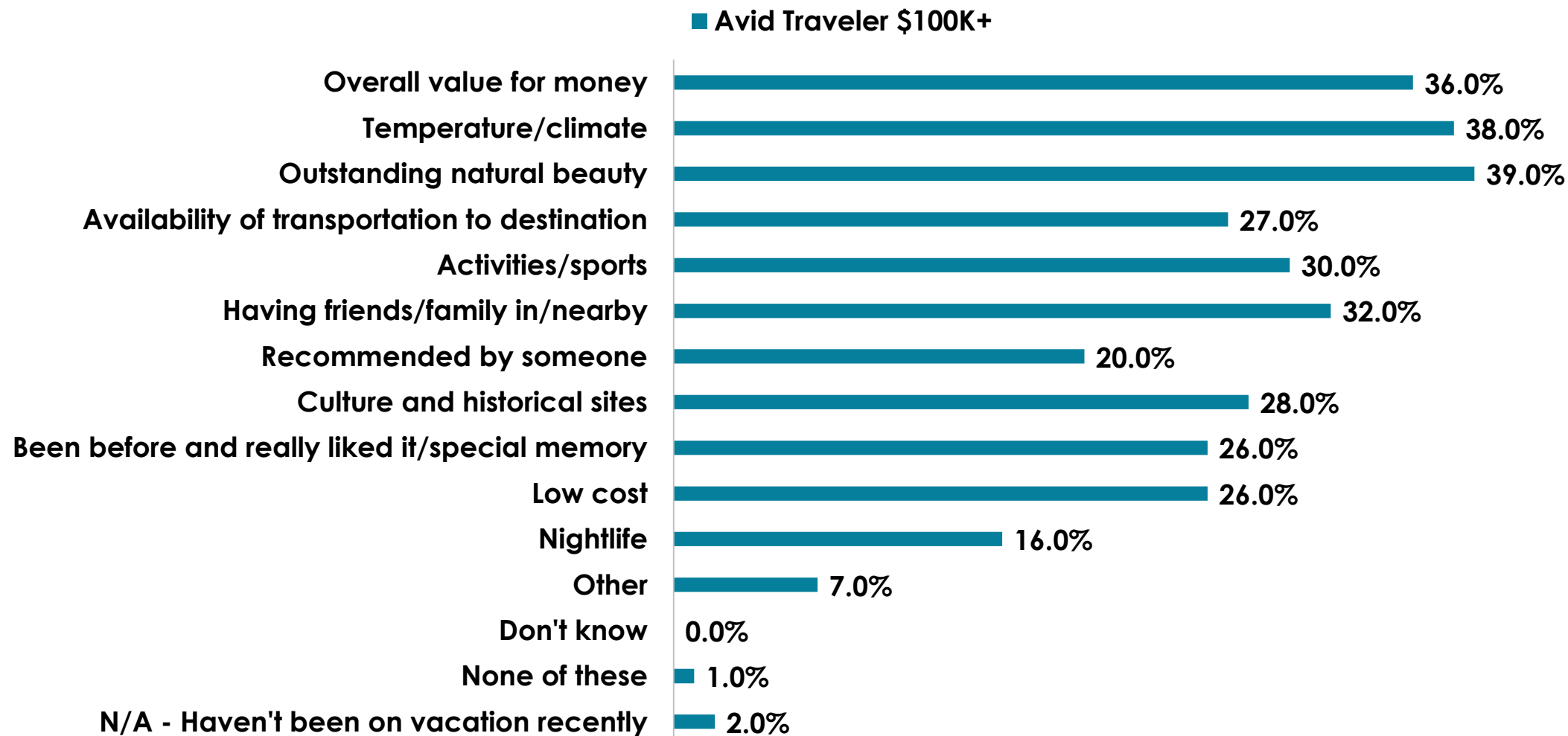
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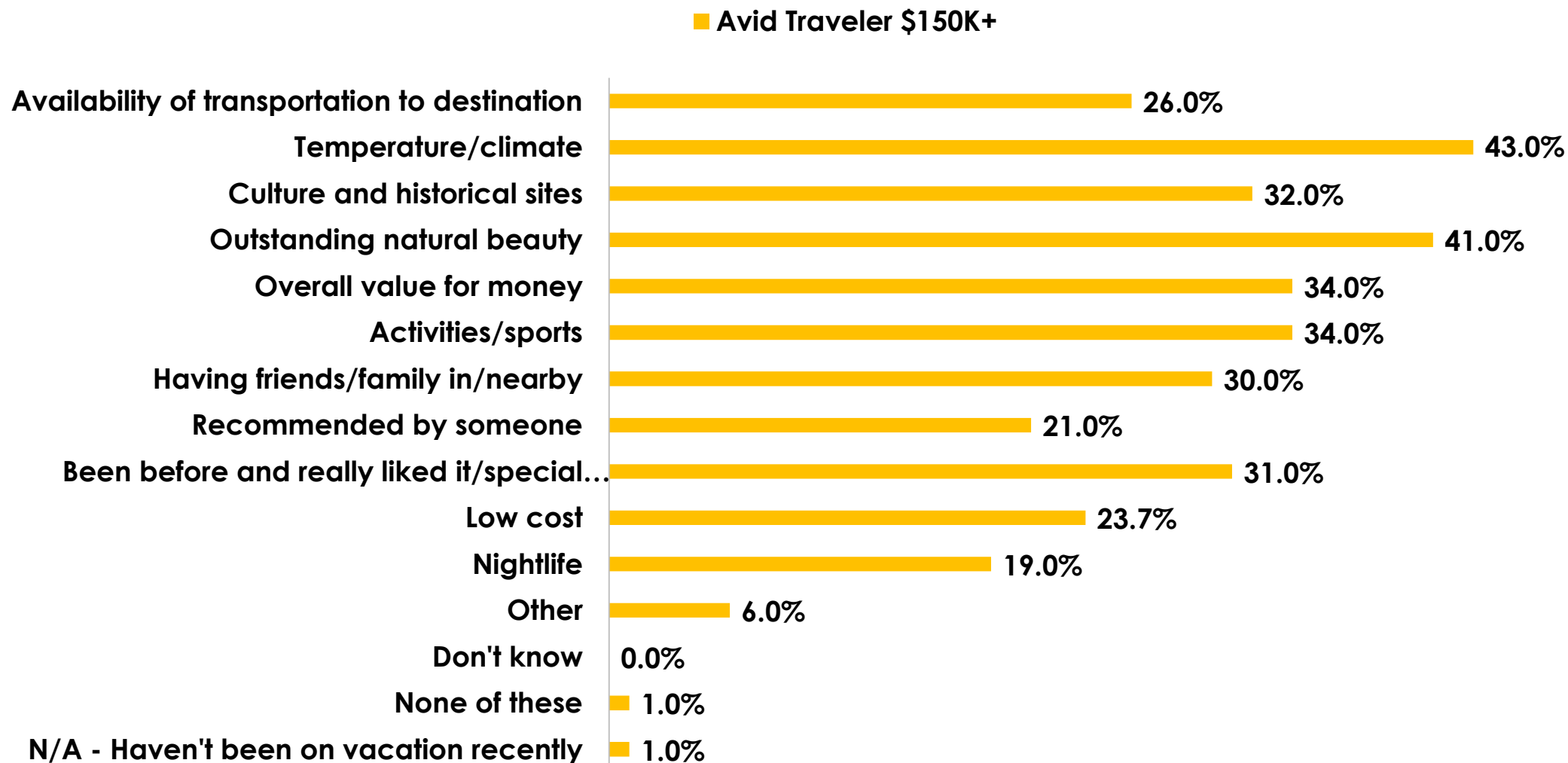
Reason for choosing most recent leisure destination

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	37.8%	43.3%	35.4%	24.0%
Availability of transportation to destination	26.6%	26.1%	30.8%	14.8%
Culture and historical sites	28.5%	31.6%	34.9%	18.5%
Overall value for money	36.2%	34.0%	32.3%	31.3%
Activities/sports	30.2%	33.6%	34.7%	16.9%
Outstanding natural beauty	38.5%	41.4%	33.8%	24.3%
Nightlife	16.0%	18.5%	29.0%	8.7%
Having friends/family in/nearby	31.9%	30.5%	36.2%	24.8%
Low cost	25.6%	24.9%	28.9%	24.0%
Been before and really liked it/special memory	25.5%	30.6%	23.9%	19.4%
Recommended by someone	19.7%	20.6%	35.0%	14.5%
Other	6.7%	6.3%	5.0%	6.4%
Don't know	0.4%	0.3%	1.9%	2.0%
None of these	1.4%	0.8%	0.3%	2.3%
N/A - Haven't been on vacation recently	2.5%	1.2%	3.3%	23.6%

Reason for choosing most recent leisure destination

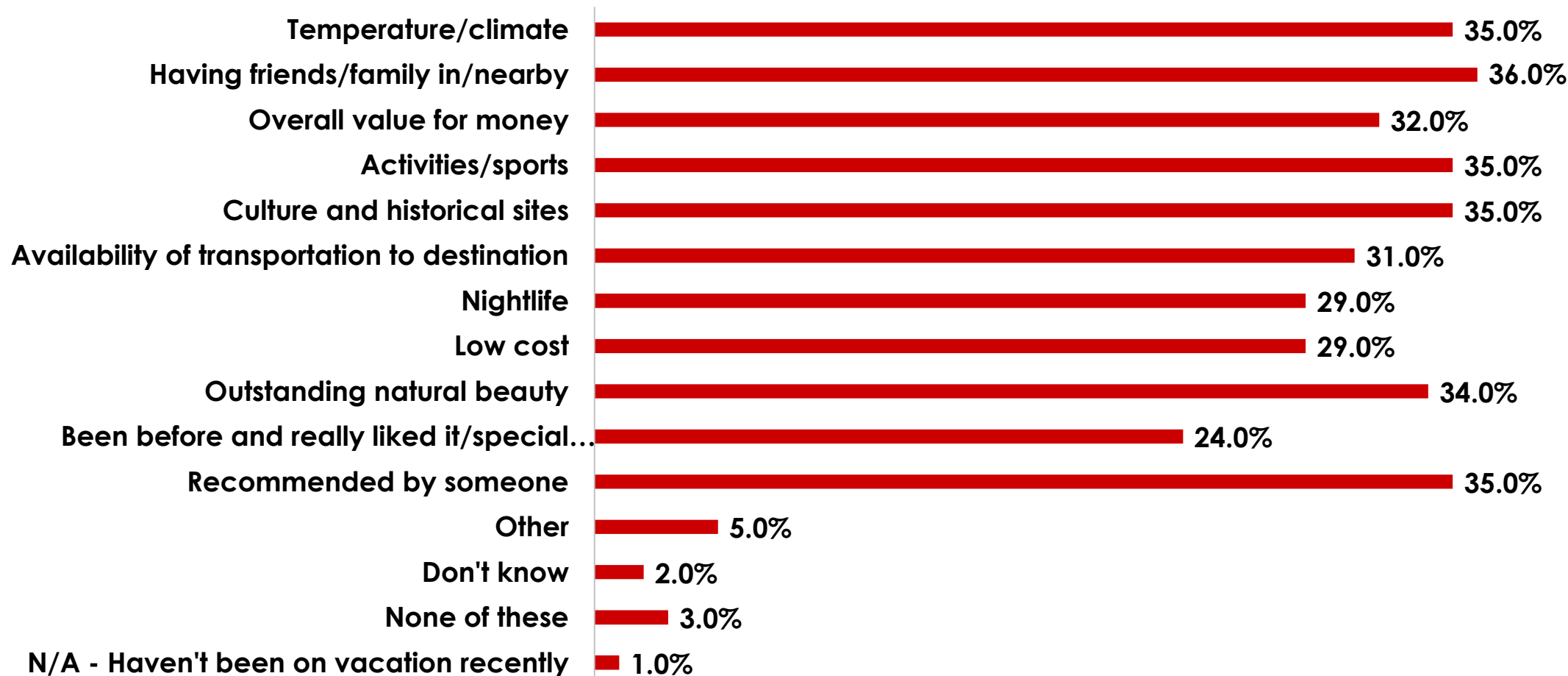


Reason for choosing most recent leisure destination

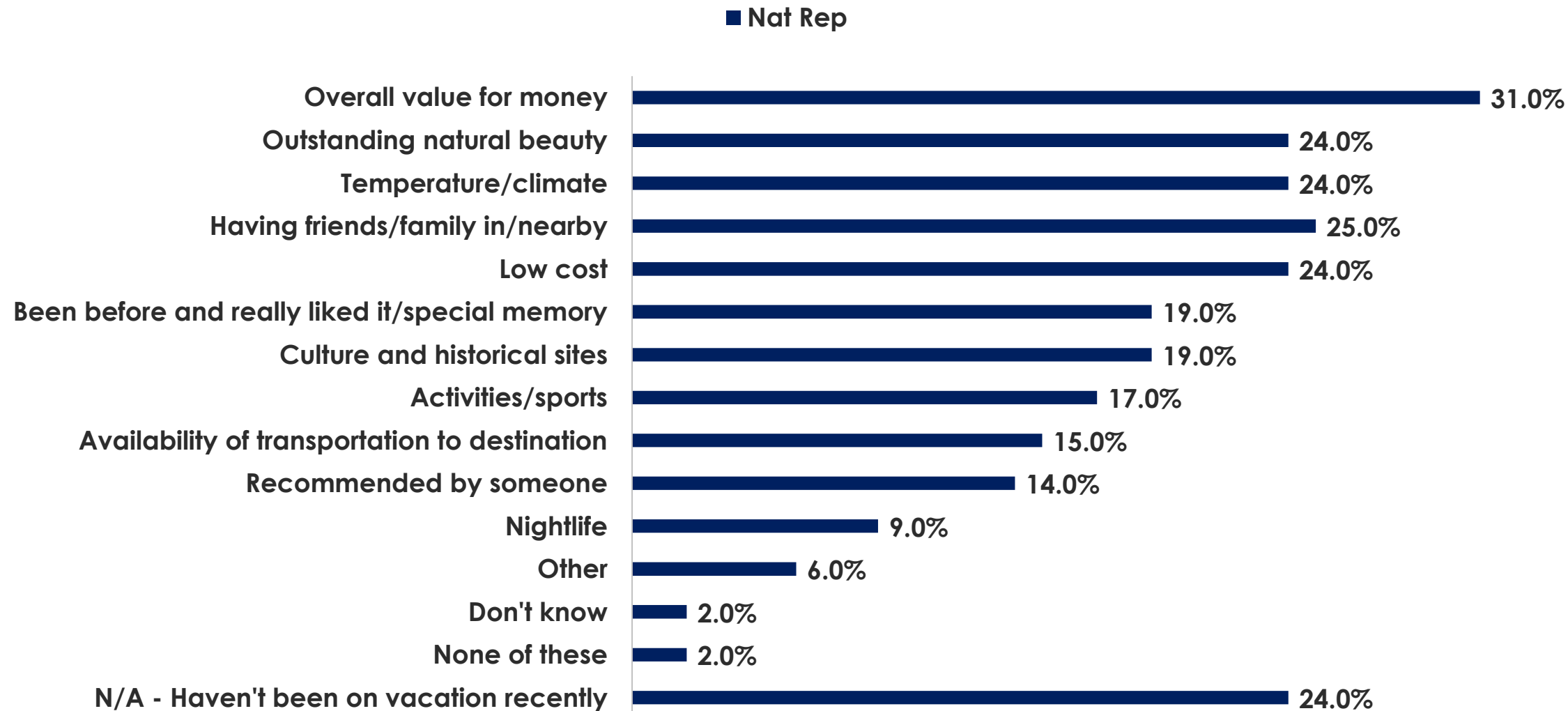


Reason for choosing most recent leisure destination

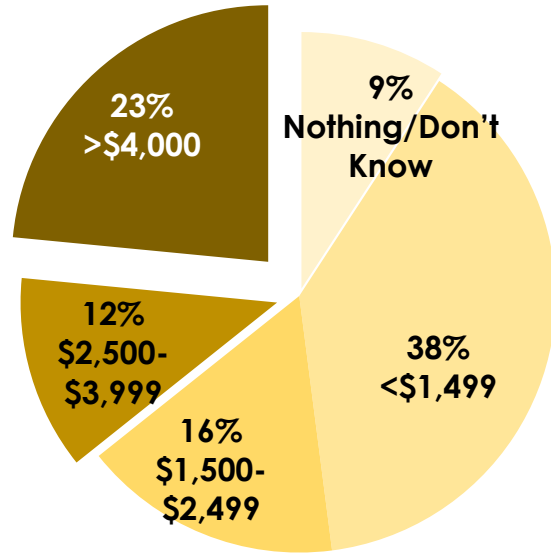
■ Long- Distance Avid Traveler under 55



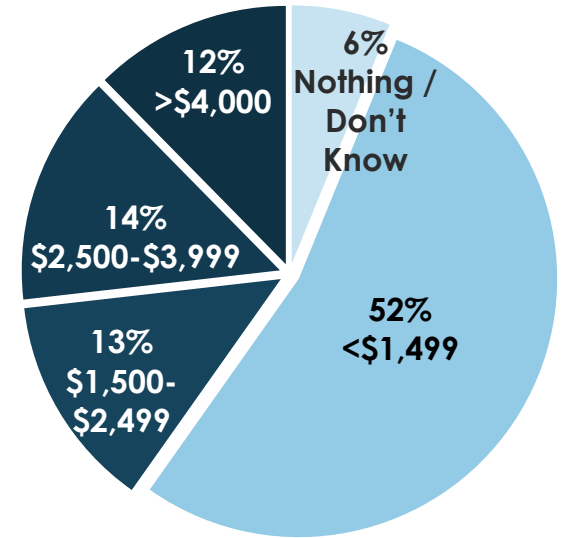
Reason for choosing most recent leisure destination



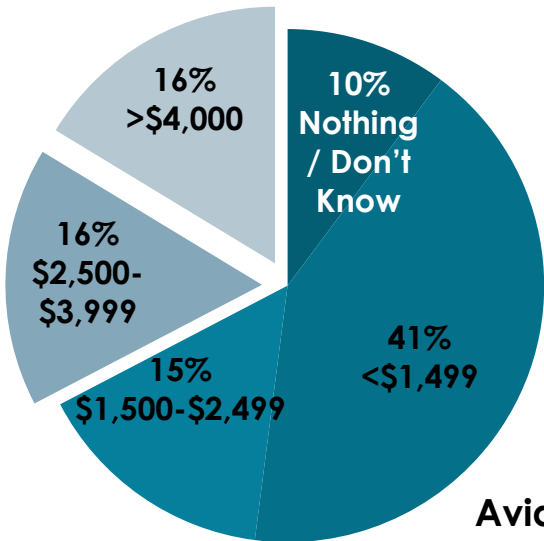
Most recent leisure trip - total spend



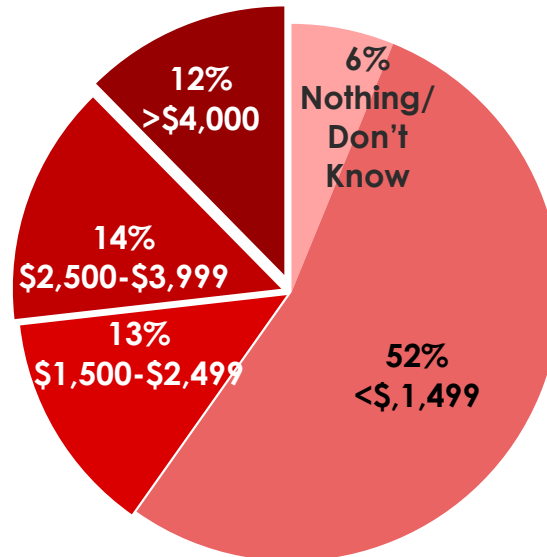
Avid Travelers \$150K+



Nat Rep



Avid Travelers \$100K+

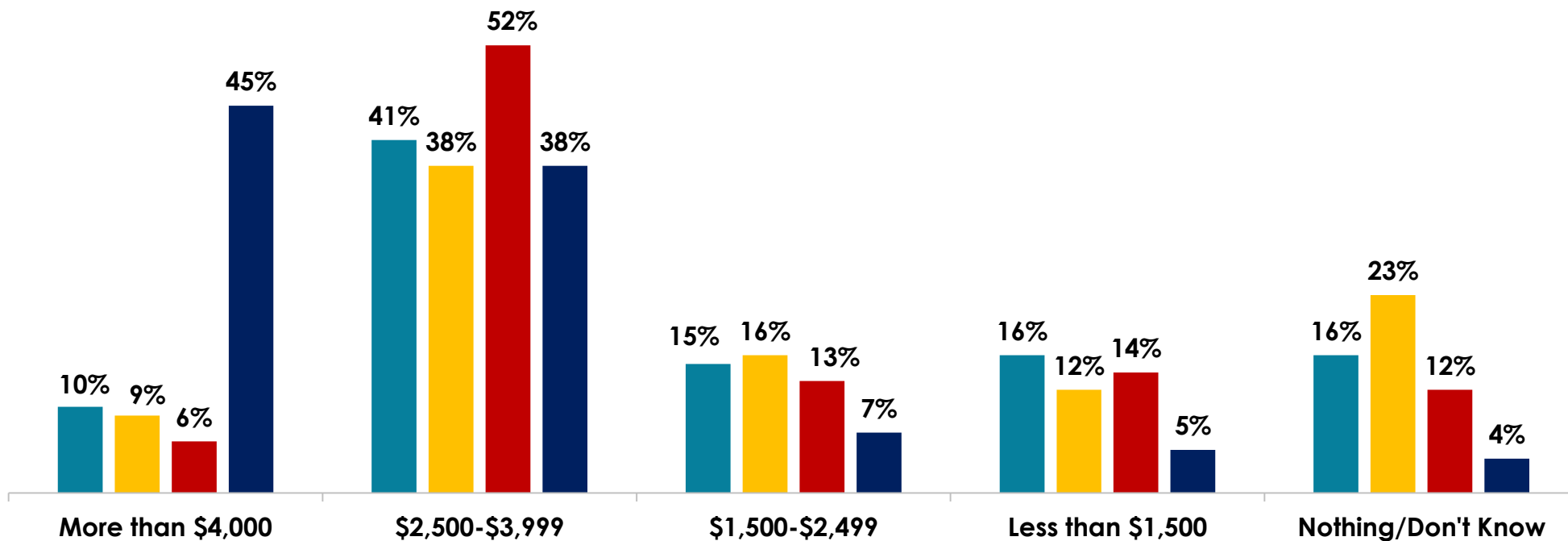


Long-Distance Air Travelers under 55

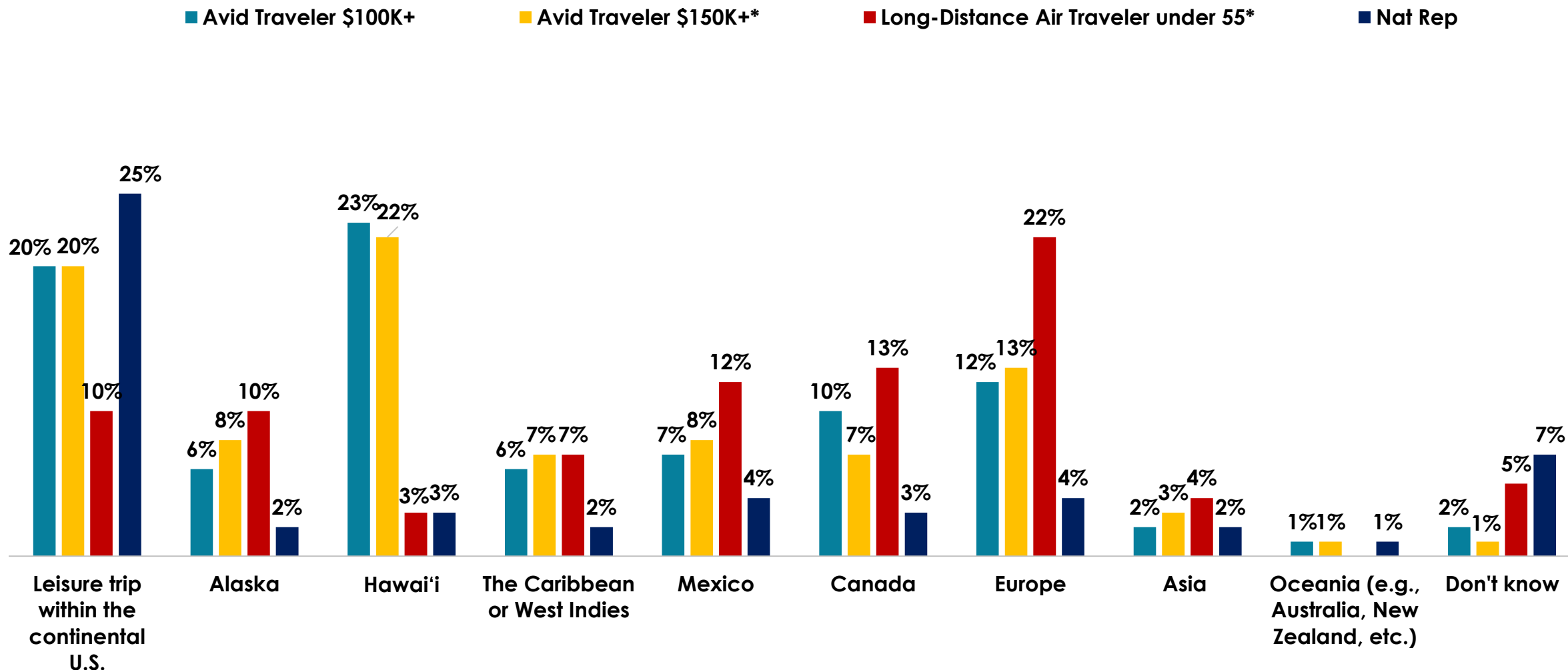
Based on Hawai'i Tourism Authority data, the average U.S. per person per trip spend for 2019 was \$1,693.32.

Most recent leisure trip - total spend

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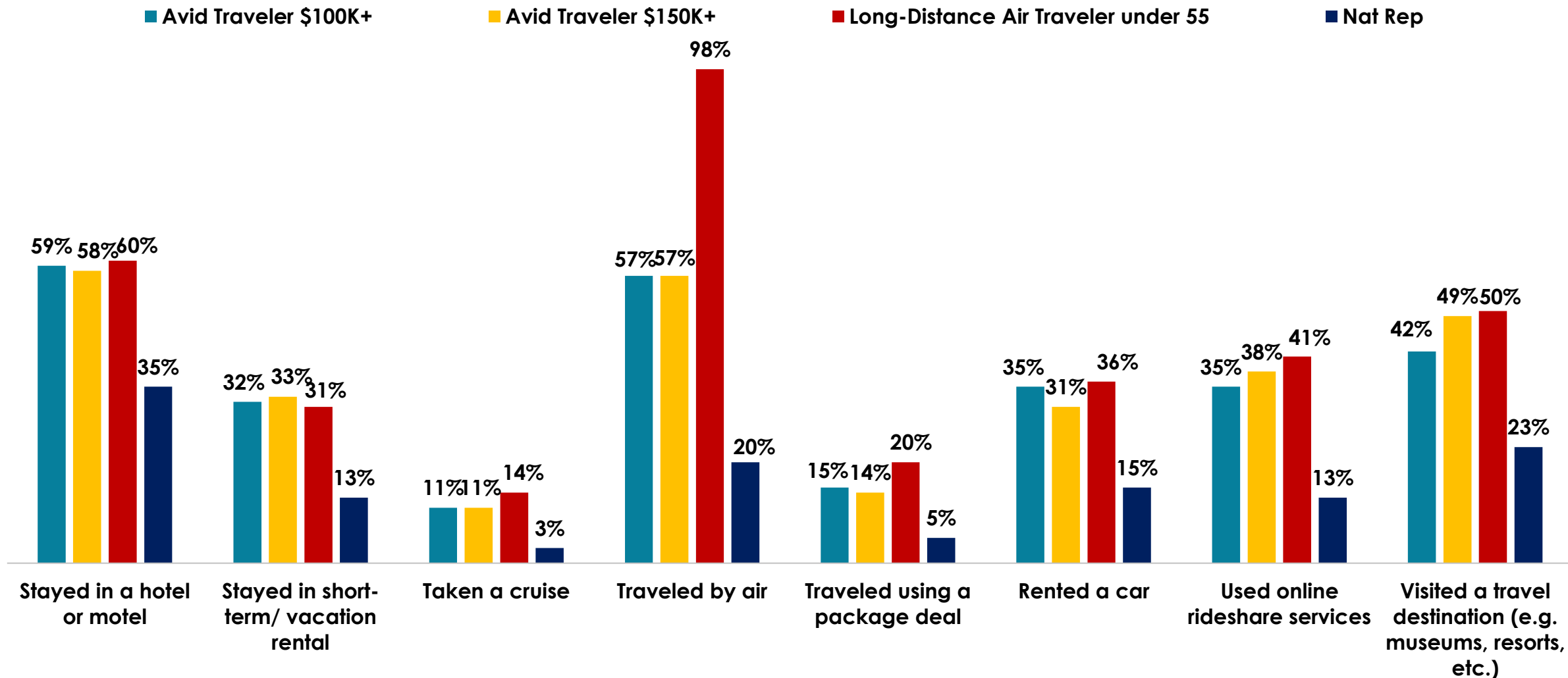
Leisure trip - next destination



*YouGov sample size <100

Source: HVCB analysis of YouGov data provided by HTA as of May 8, 2022

Leisure trip - activities in last 12 months



Travel Mindset

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 ■ Avid Traveler \$150K+
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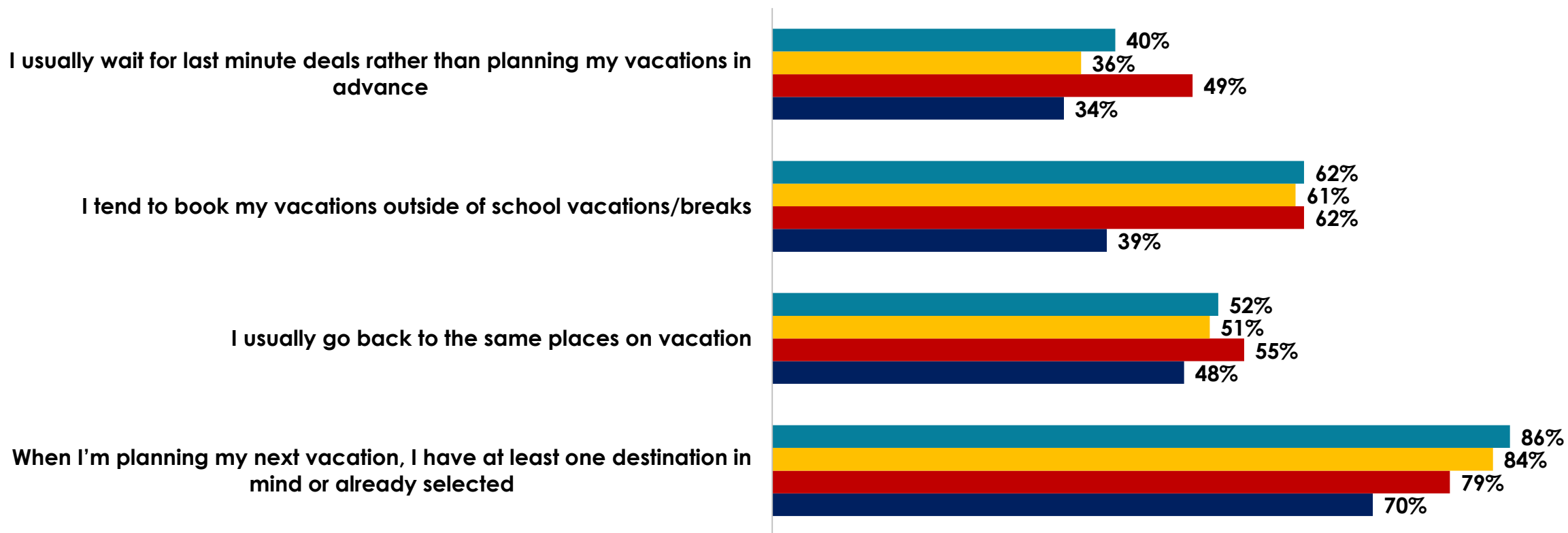
Travel Activities

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Booking & Spending Attitudes

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

