

COVID-19 Impact on U.S. Avid Travelers

An HVCB analysis of YouGov data provided by HTA as of June 5, 2022

Reported on June 16, 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)

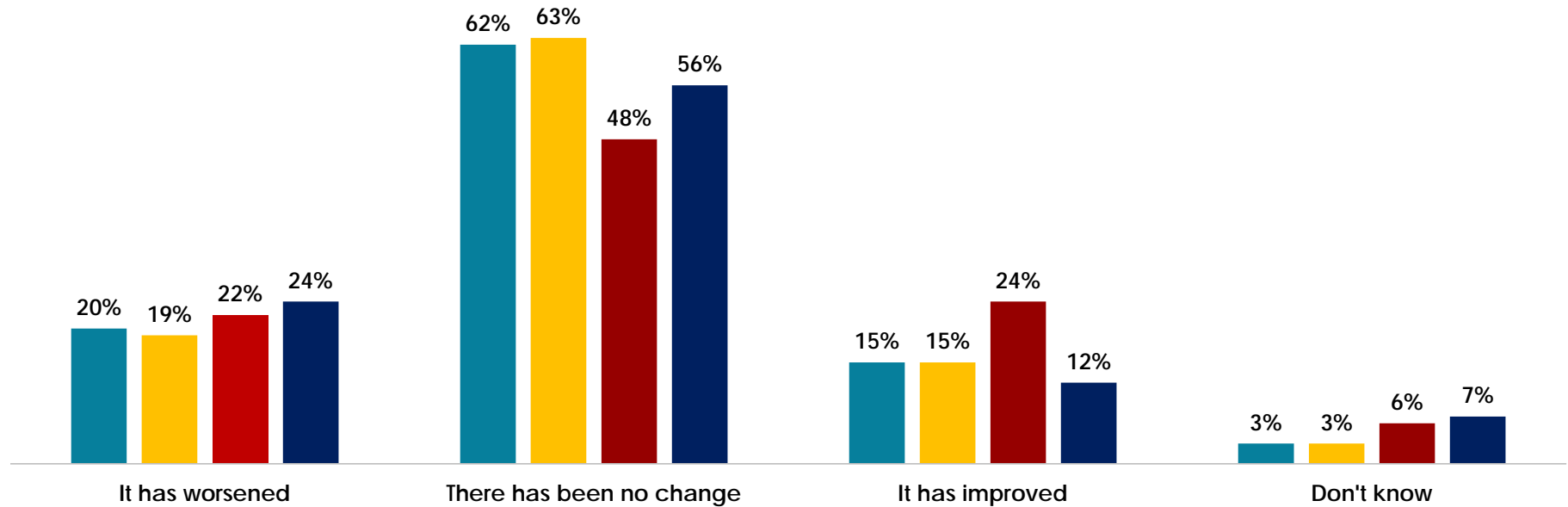
- Representative of U.S. adults in terms of age, gender, social class and education



Travelers' Pandemic Outlook

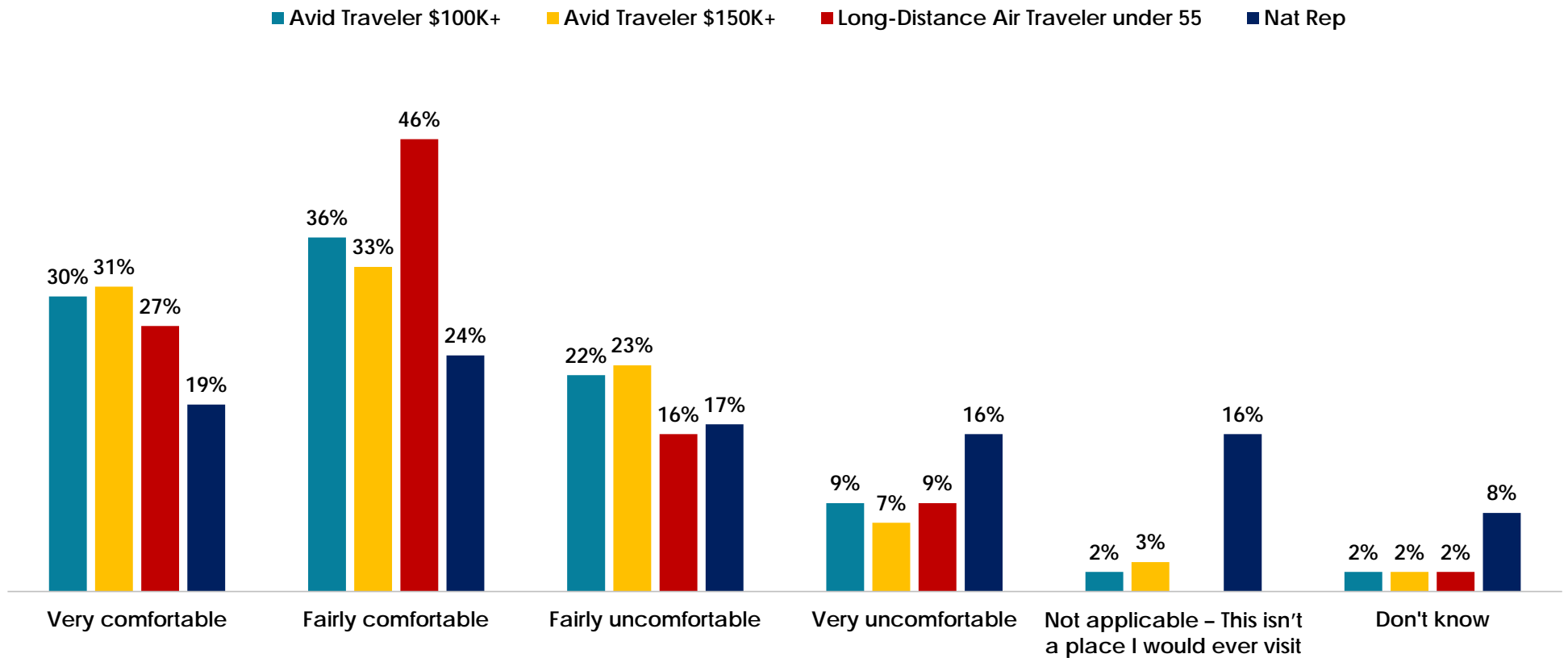
How has your household economic situation changed in the past month?

■ 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 June 5, 2022

Level of comfort visiting an airport right now



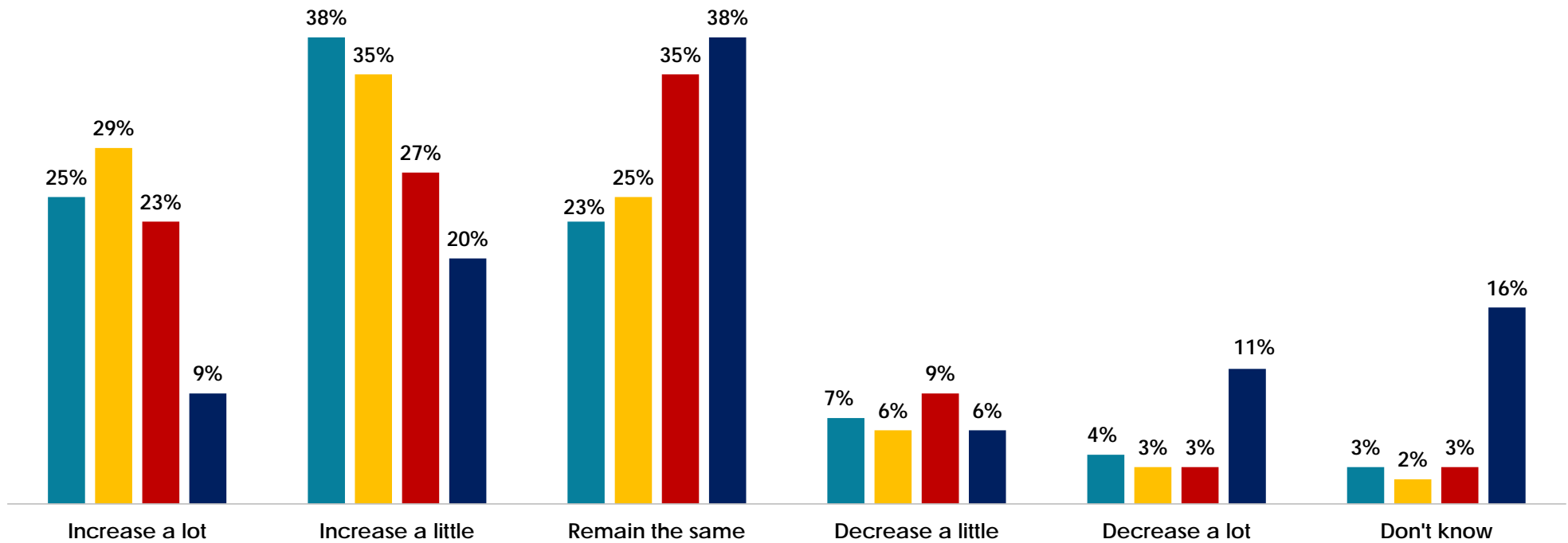
Source: HVCB analysis of YouGov data provided by HTA as of June 5, 2022



Future Travel Plans

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

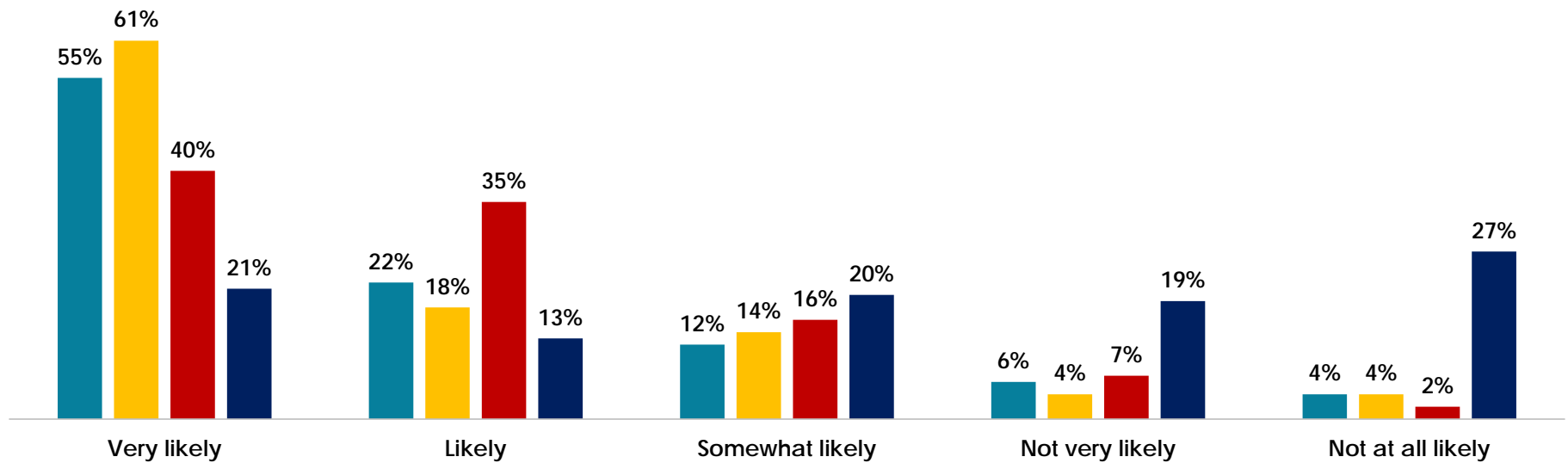
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Future Travel – Likelihood of purchasing travel or leisure services in the next 12 months

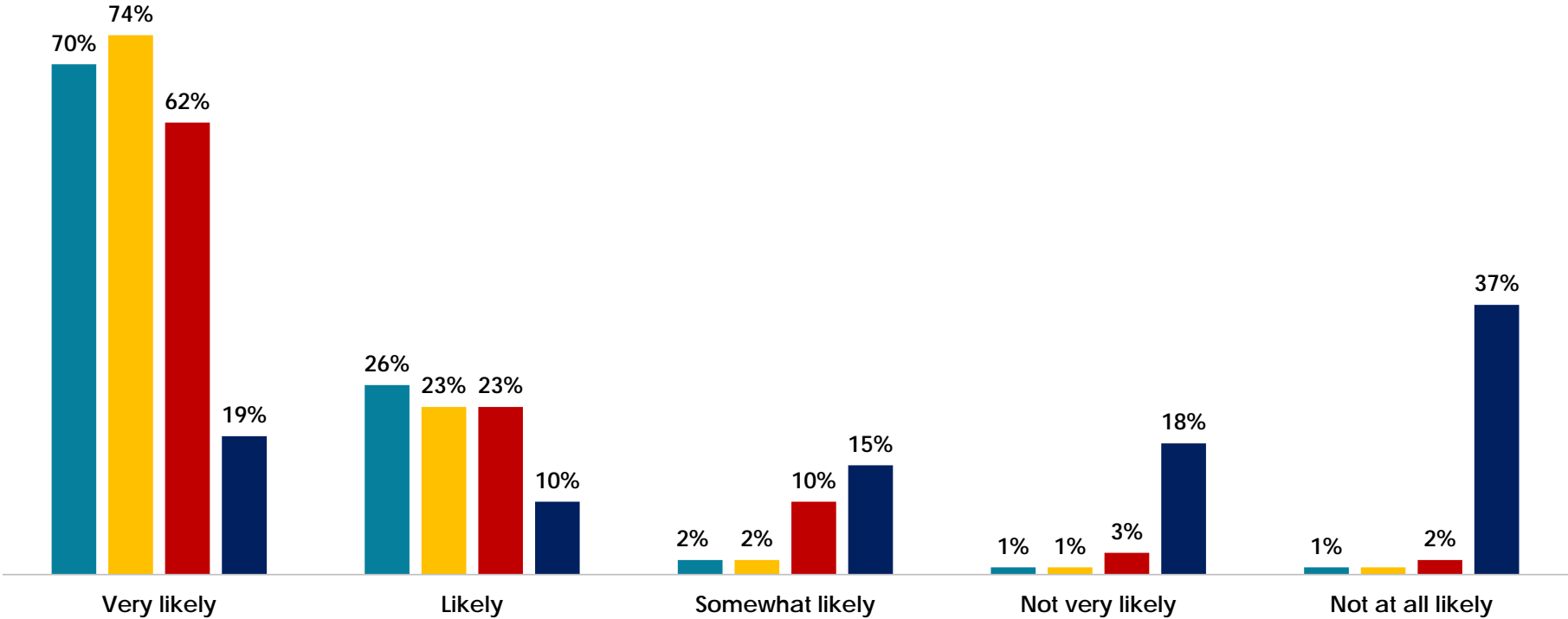
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Future Travel – Likelihood of booking a flight in the next 12 months

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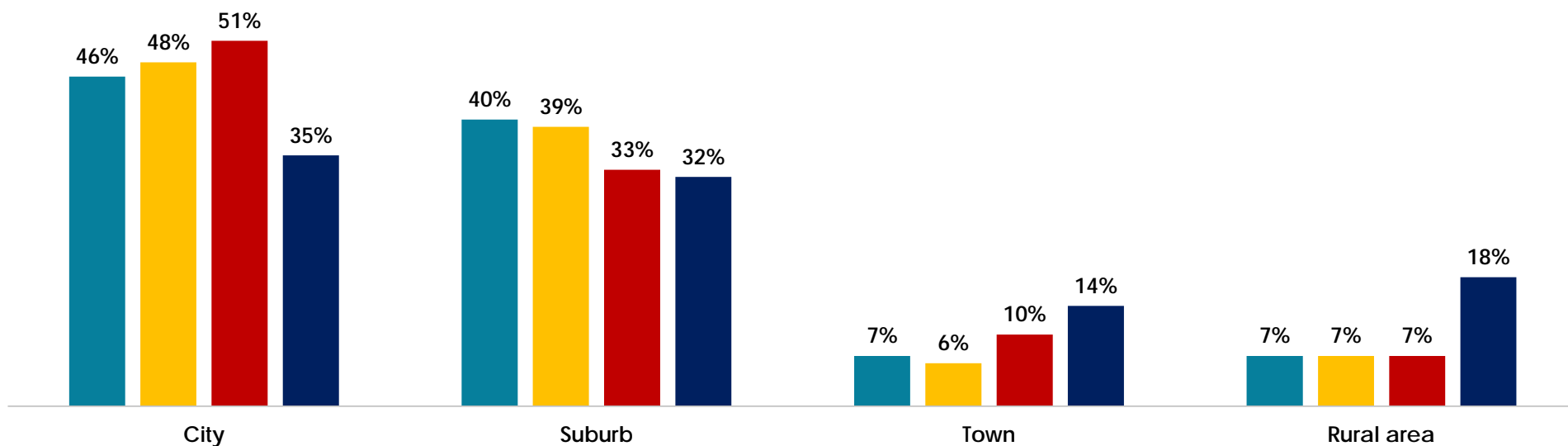


Traveler Profiles

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

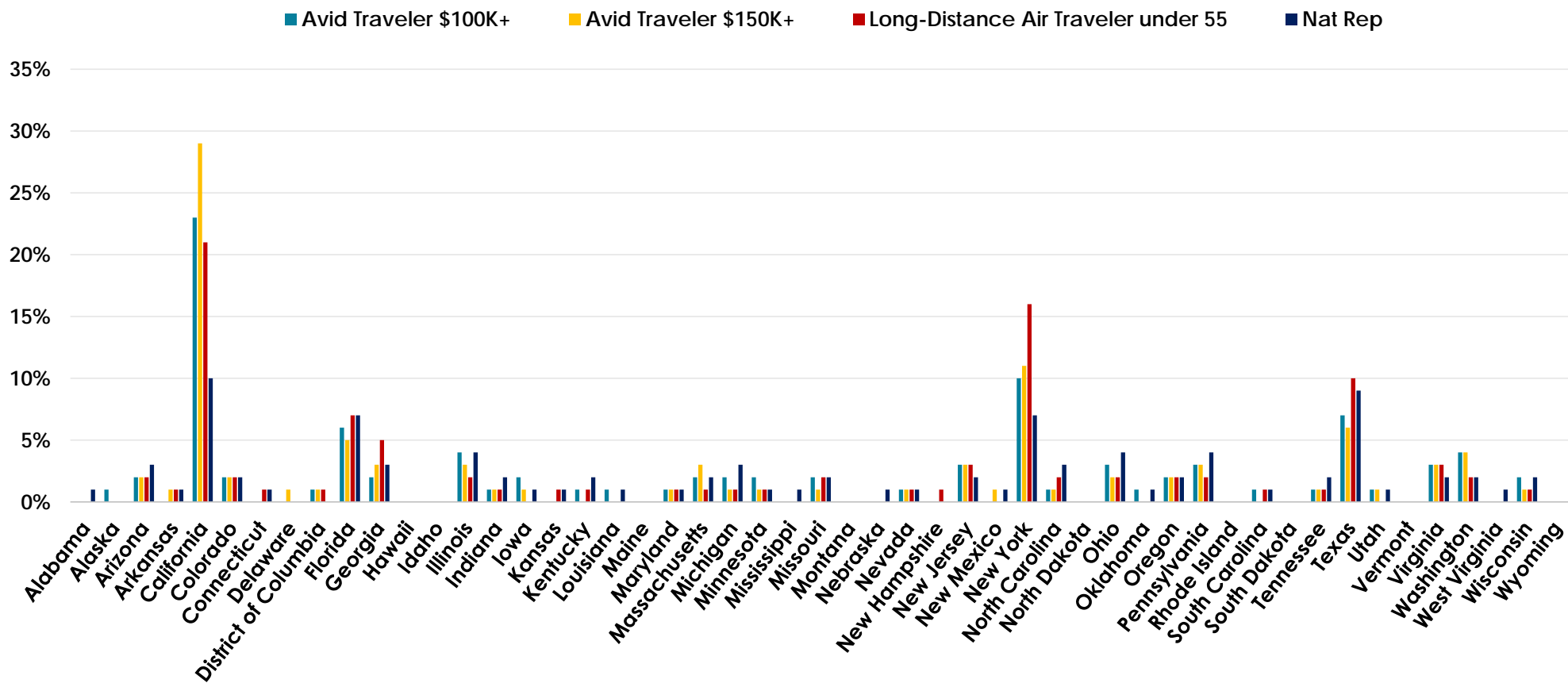
Type of Area Living In

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



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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	22.7%
New York	9.8%
Texas	7.4%
Florida	6.4%
Illinois	3.9%
Washington	3.5%
New Jersey	3.4%
Virginia	3.3%
Ohio	2.8%
Pennsylvania	2.5%

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

California	29.2%
New York	10.5%
Texas	6.4%
Florida	5.2%
Washington	4.3%
Georgia	3.4%
Illinois	3.2%
Virginia	3.2%
New Jersey	2.7%
Massachusetts	2.7%

Long-Distance Air Traveler under 55

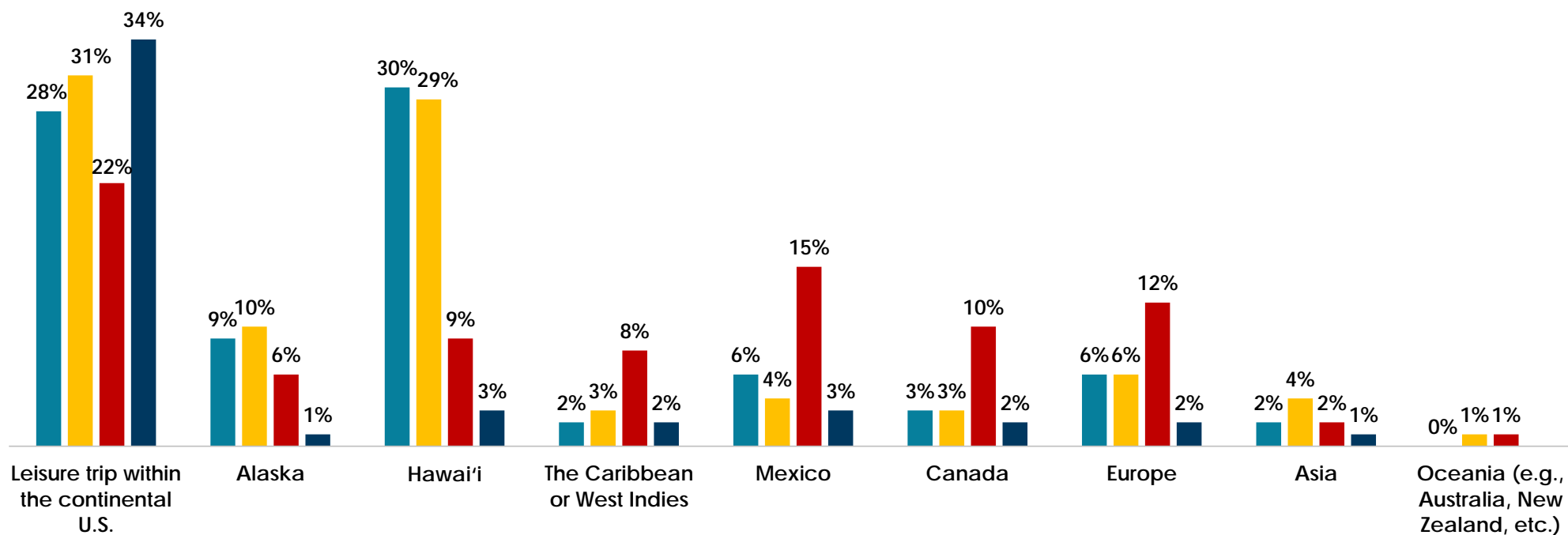
California	20.9%
New York	16.0%
Texas	10.5%
Florida	6.6%
Georgia	5.2%
New Jersey	3.2%
Virginia	3.0%
Oregon	2.4%
Washington	2.1%
Illinois	2.1%

Nat Rep

California	10.1%
Texas	8.9%
Florida	7.3%
New York	7.1%
Pennsylvania	4.2%
Ohio	3.9%
Illinois	3.6%
Georgia	3.0%
Michigan	2.8%
Arizona	2.8%

Leisure trip – most recent destination

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

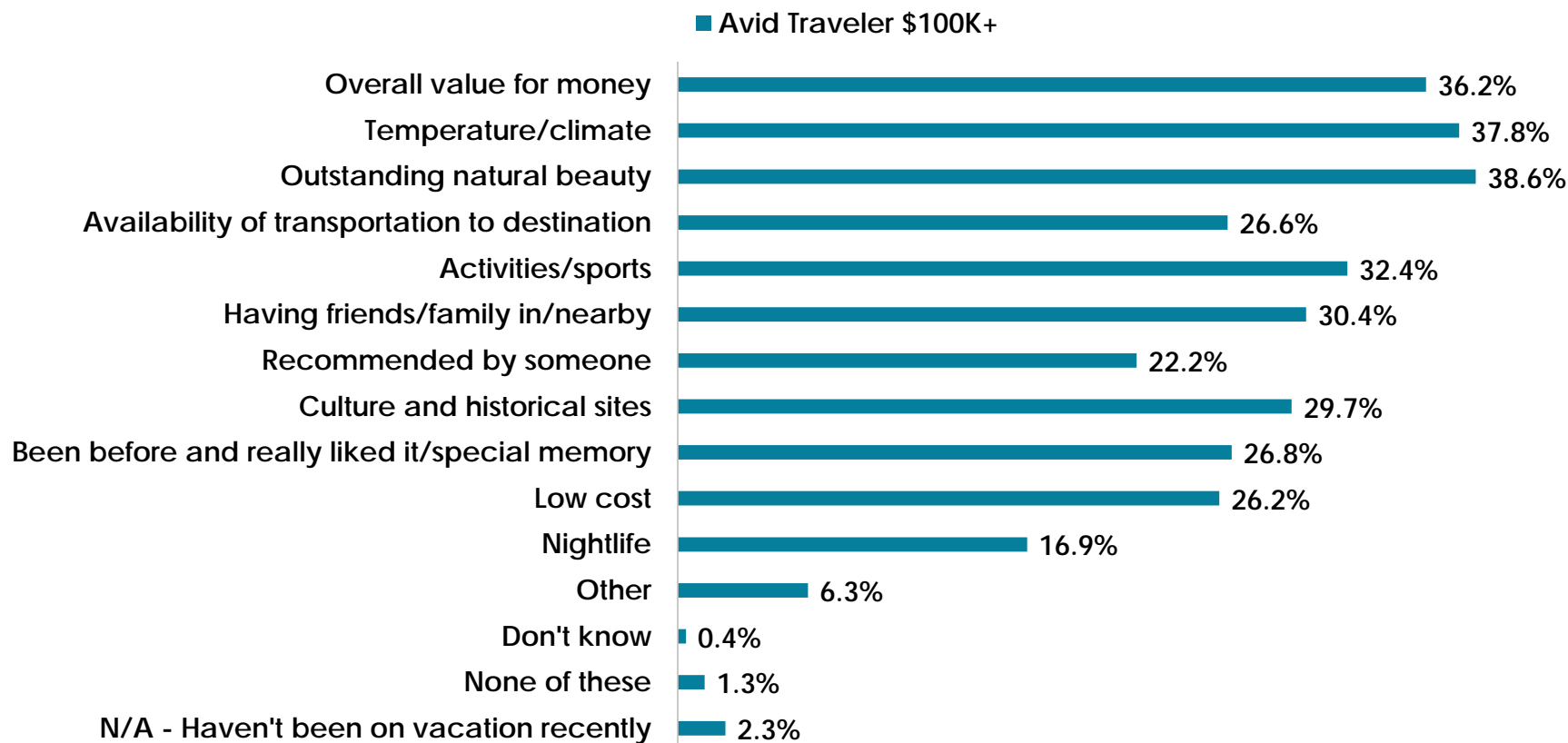


Reason for choosing most recent leisure destination

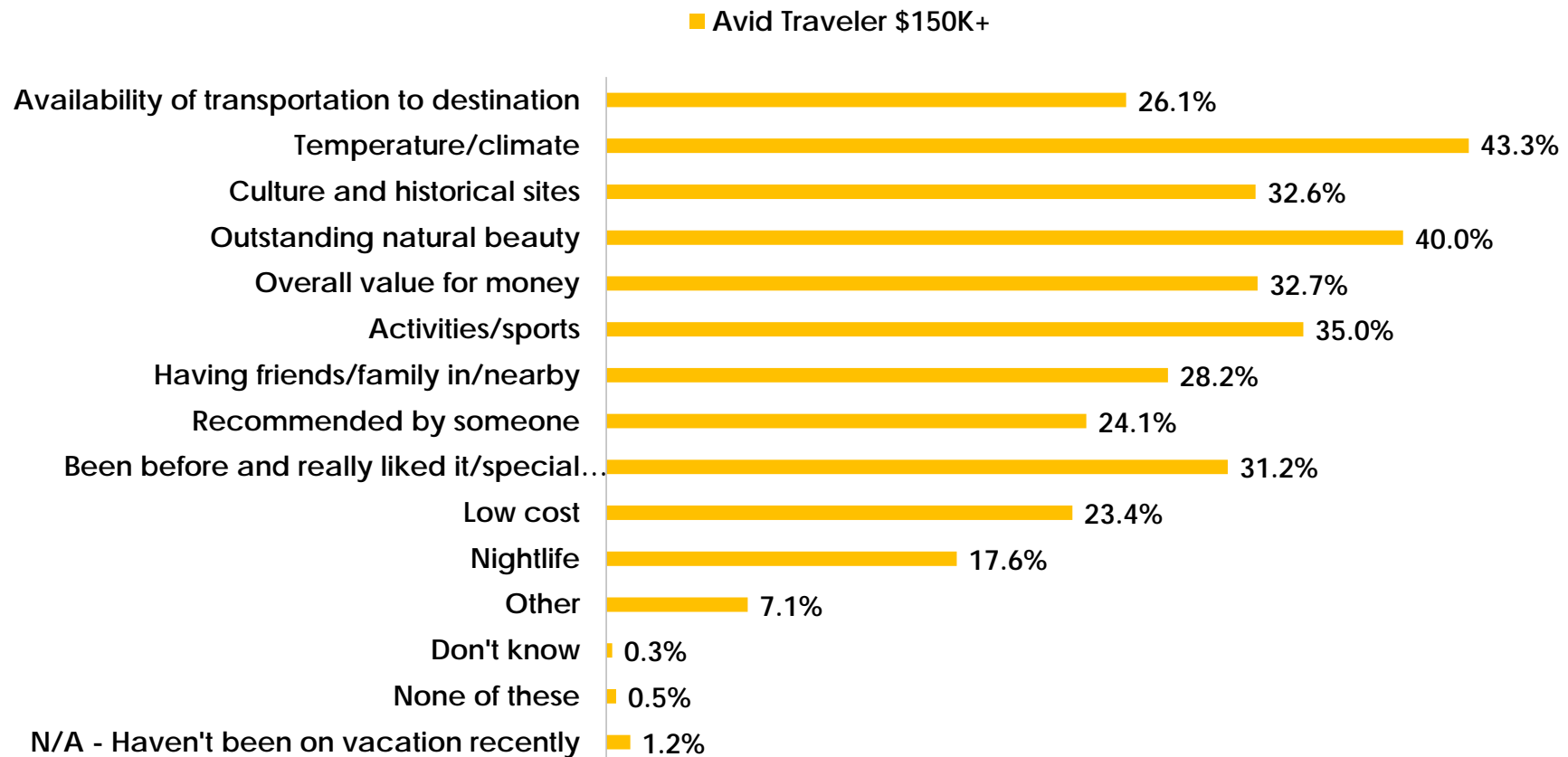
Reasons	Avid Traveler \$100K, 25-54, individual	Avid Traveler \$150K, 25-54, 2+ household	Long-Distance Air Traveler under 55	Nat Rep
The temperature/climate	37.8%	43.3%	35.4%	24.0%
Availability of transportation to destination	26.6%	26.1%	30.8%	14.8%
Culture and historical sites	29.7%	32.6%	34.0%	18.4%
Overall value for money	36.2%	32.7%	33.0%	30.9%
Activities/sports	32.4%	35.0%	32.3%	16.8%
Outstanding natural beauty	38.6%	40.0%	34.0%	24.1%
Nightlife	16.9%	17.6%	29.1%	8.8%
Having friends/family in/nearby	30.4%	28.2%	35.8%	24.6%
Low cost	26.2%	23.4%	30.2%	23.7%
Been before and really liked it/special memory	26.8%	31.2%	21.3%	19.3%
Recommended by someone	22.2%	24.1%	36.8%	14.4%
Other	6.3%	7.1%	4.6%	6.3%
Don't know	0.4%	0.3%	1.4%	2.0%
None of these	1.3%	0.5%	0.6%	2.3%
N/A - Haven't been on vacation recently	2.3%	1.2%	3.4%	23.6%

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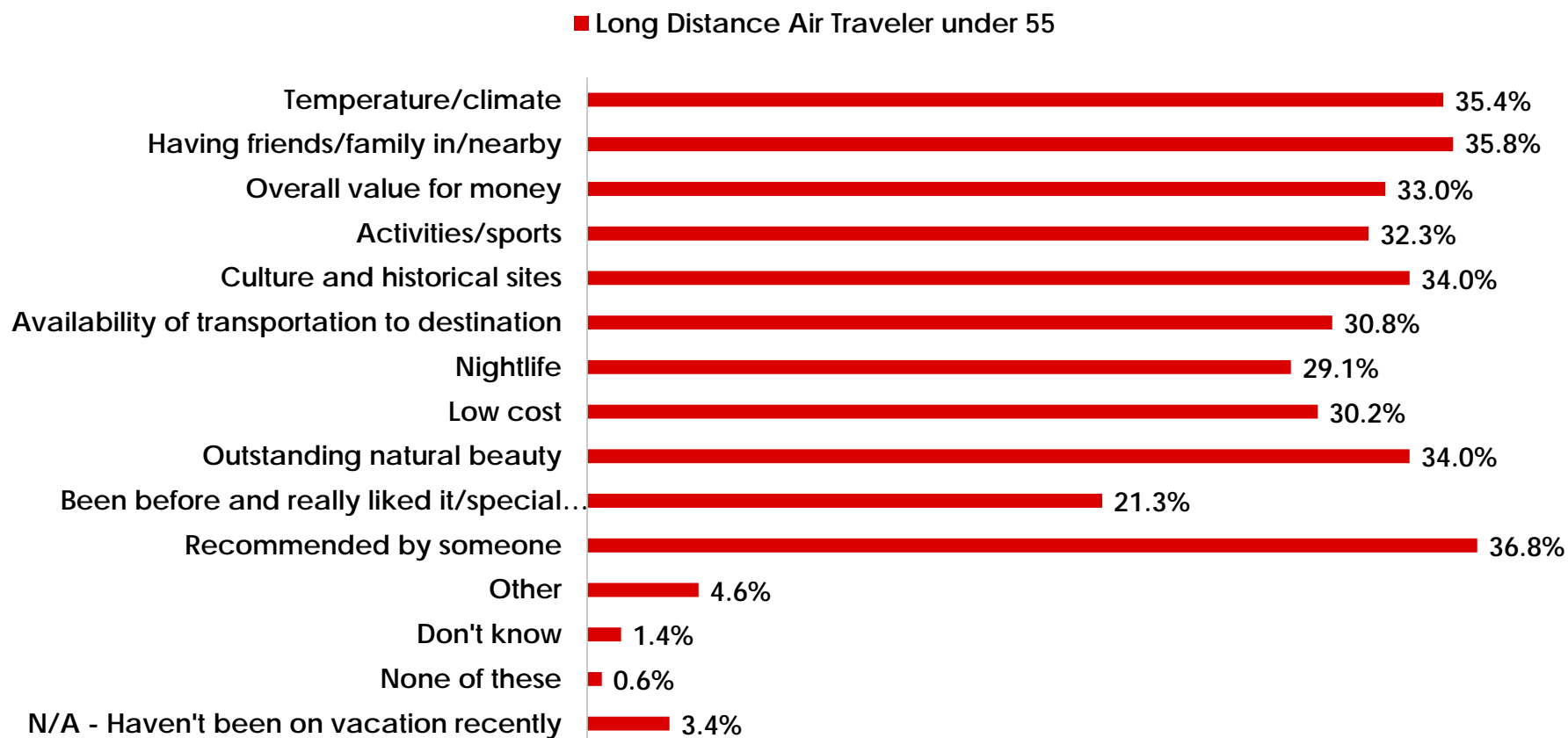
Reason for choosing most recent leisure destination



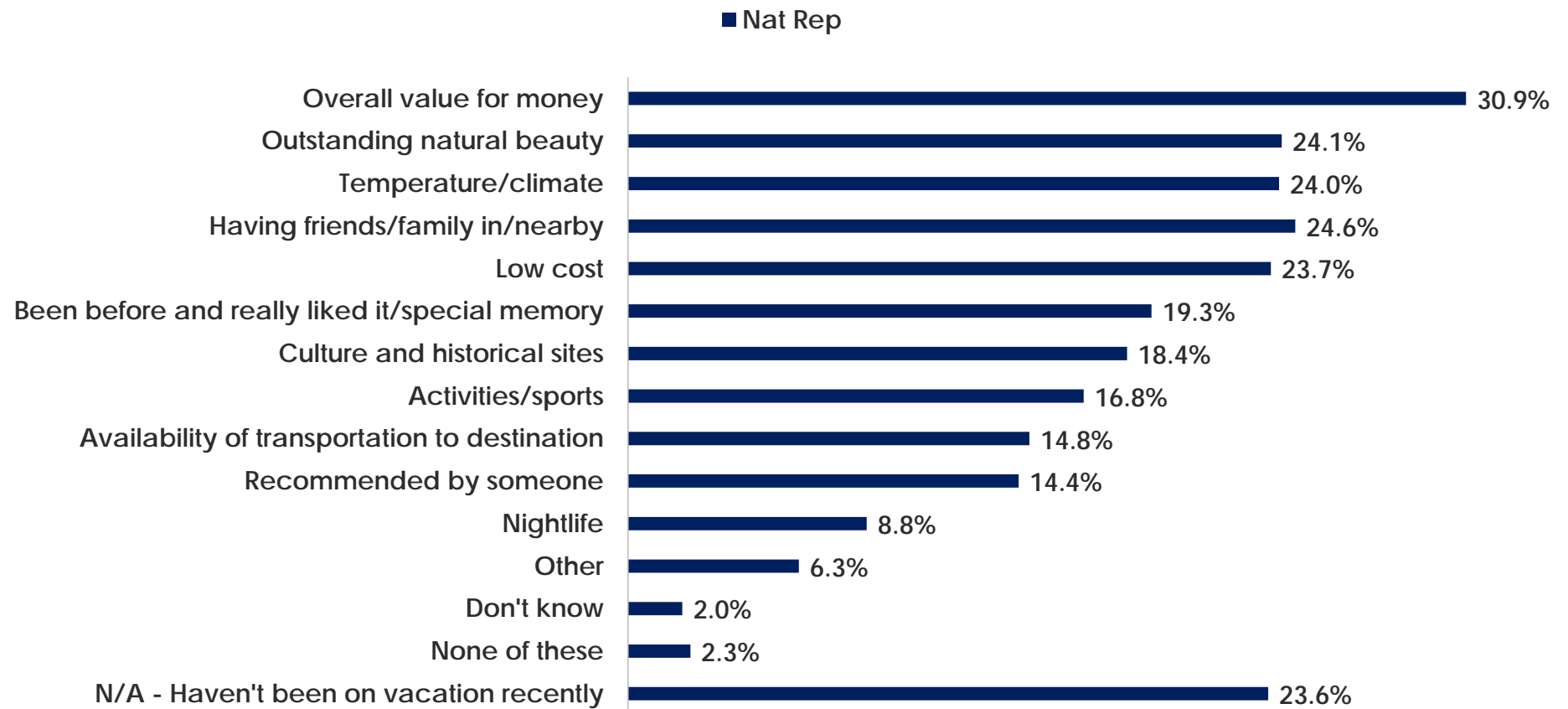
Reason for choosing most recent leisure destination



Reason for choosing most recent leisure destination

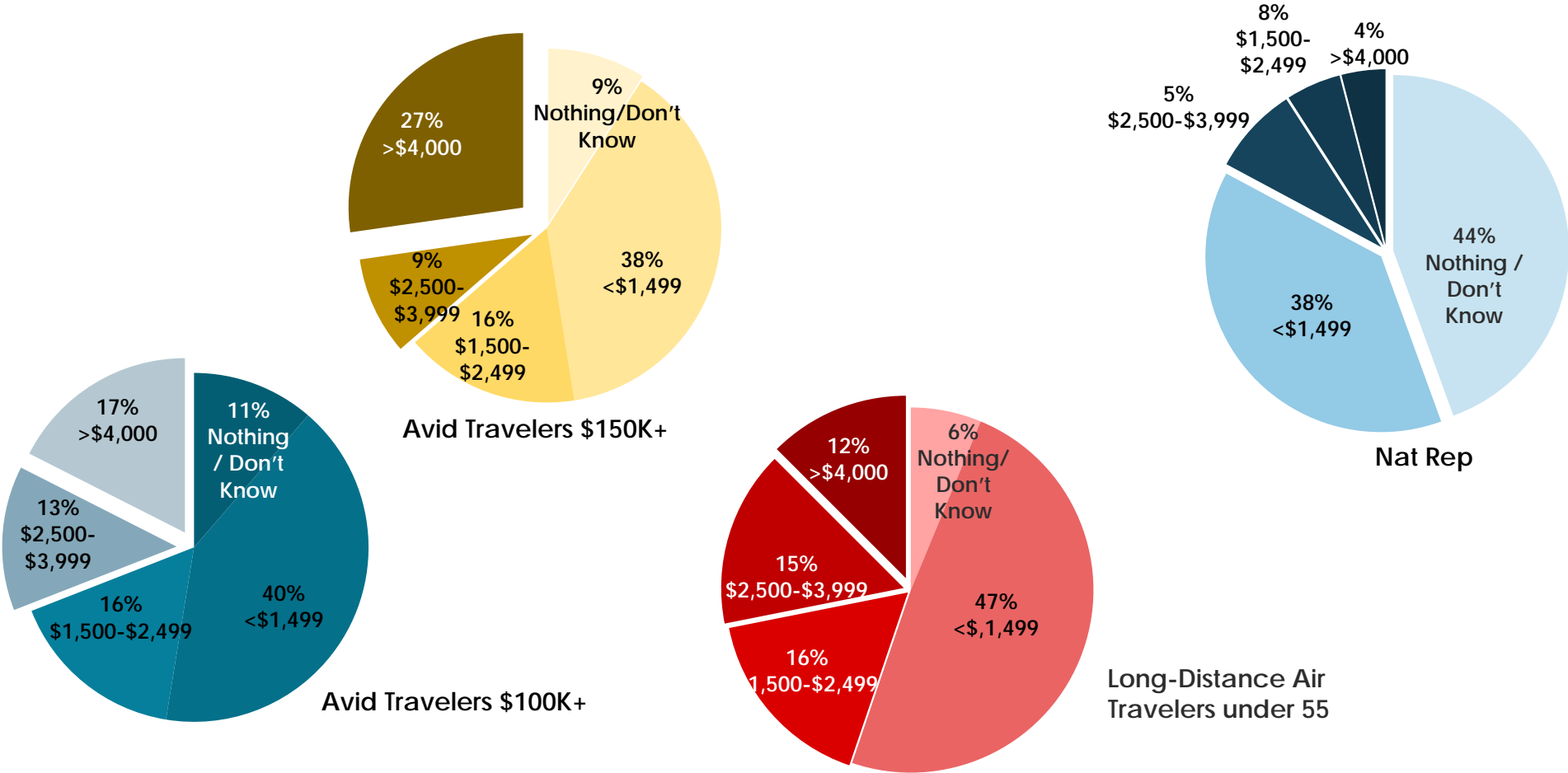


Reason for choosing most recent leisure destination



Source: HVCB analysis of YouGov data provided by HTA as of June 5, 2022

Most recent leisure trip - total spend

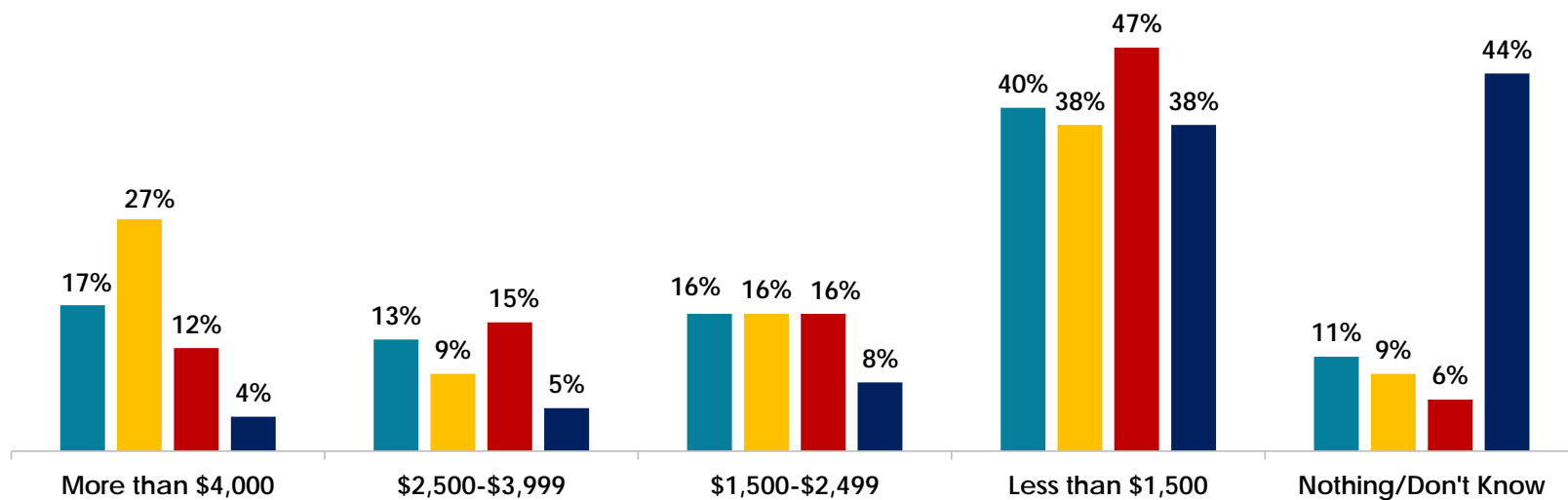


Based on Hawai'i Tourism Authority data, the average U.S. per person per trip spend for 2019 was \$1,693.32.

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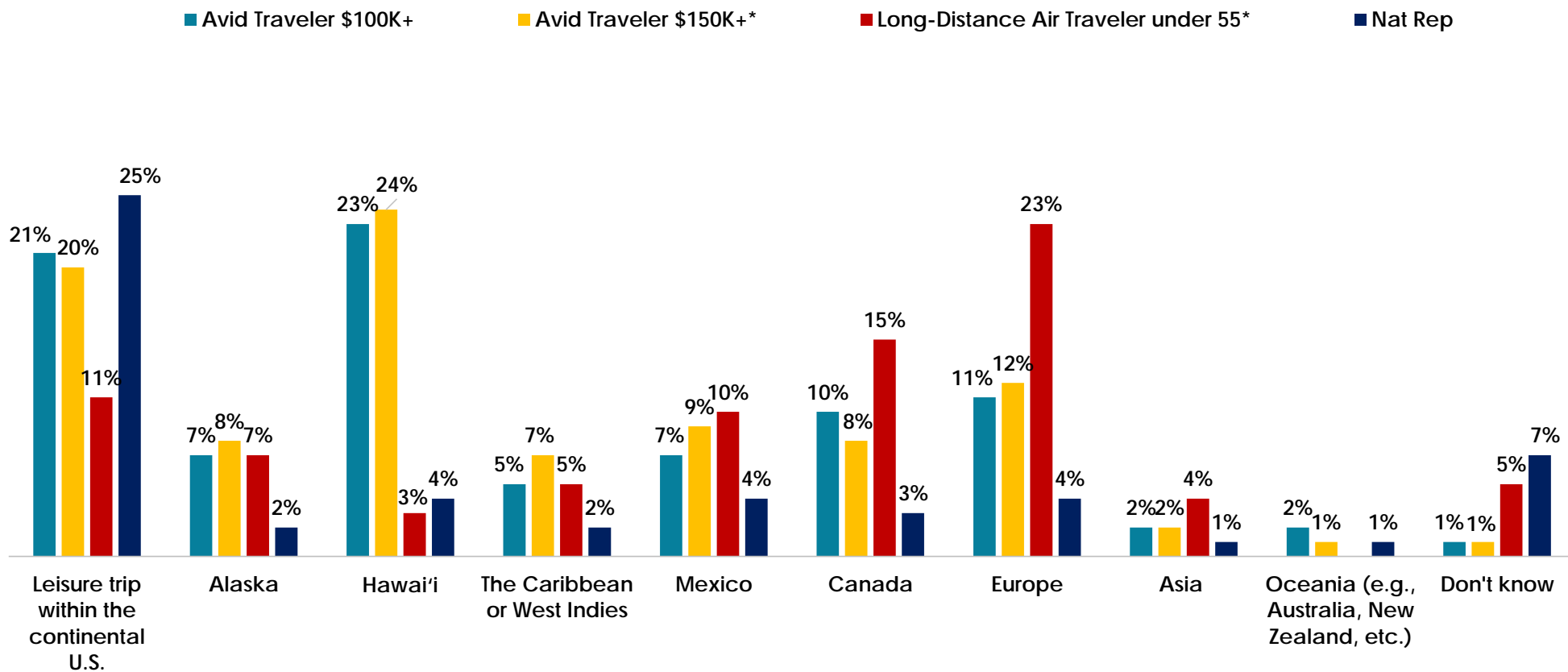
Most recent leisure trip - total spend

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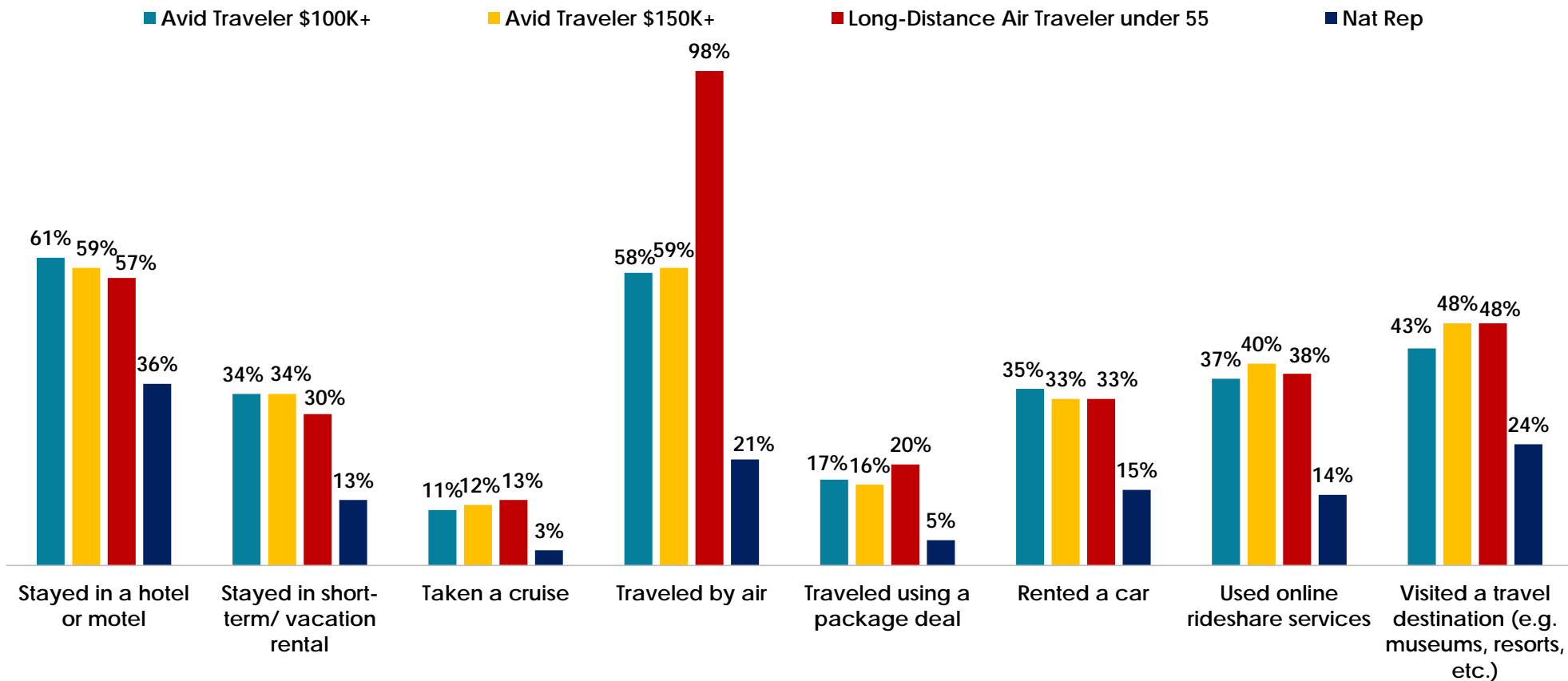
Leisure trip - next destination



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Leisure trip - activities in last 12 months



Travel Mindset

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Travel Activities

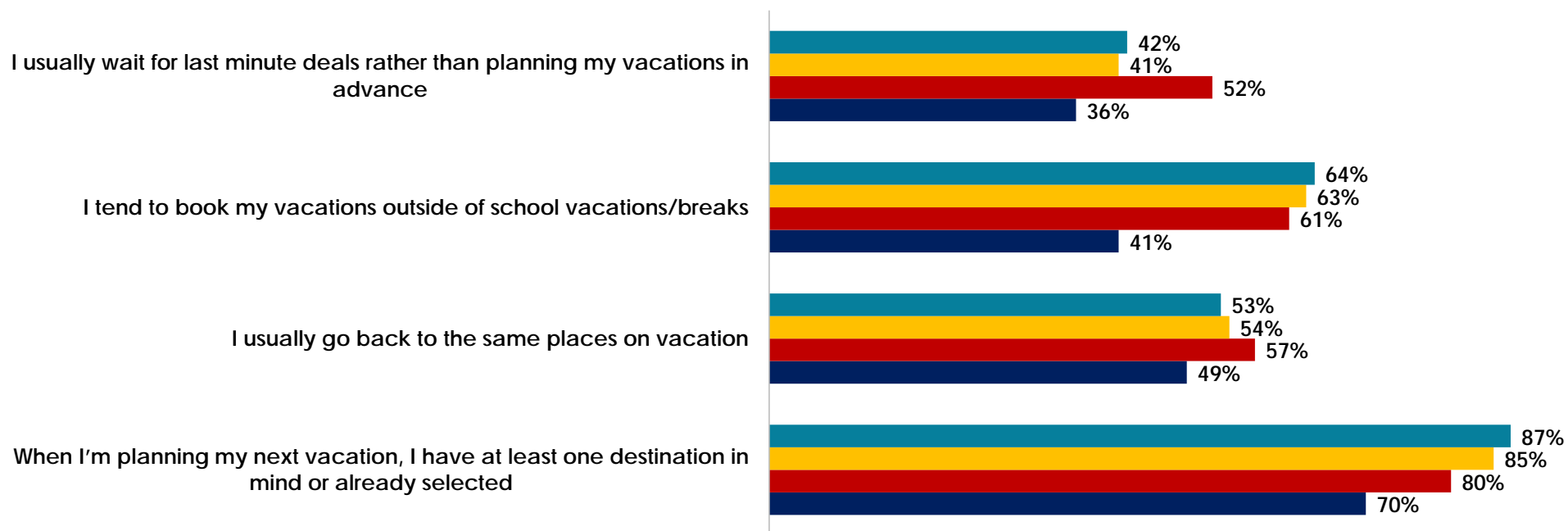
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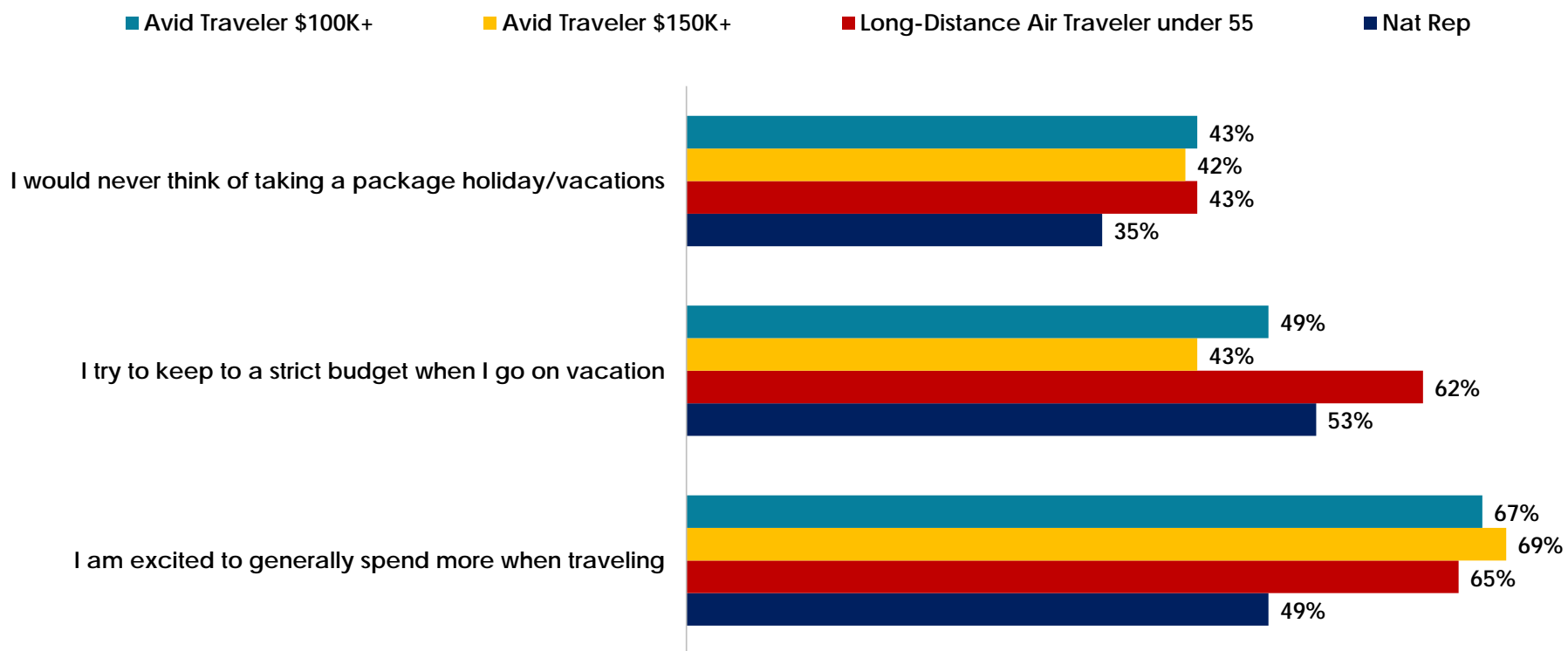
Booking & Spending Attitudes

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Booking & Spending Attitudes



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