

COVID-19 Impact on U.S. Avid Travelers

An HVCB analysis of YouGov data provided by HTA as of October 9, 2022

Reported on October 20, 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)

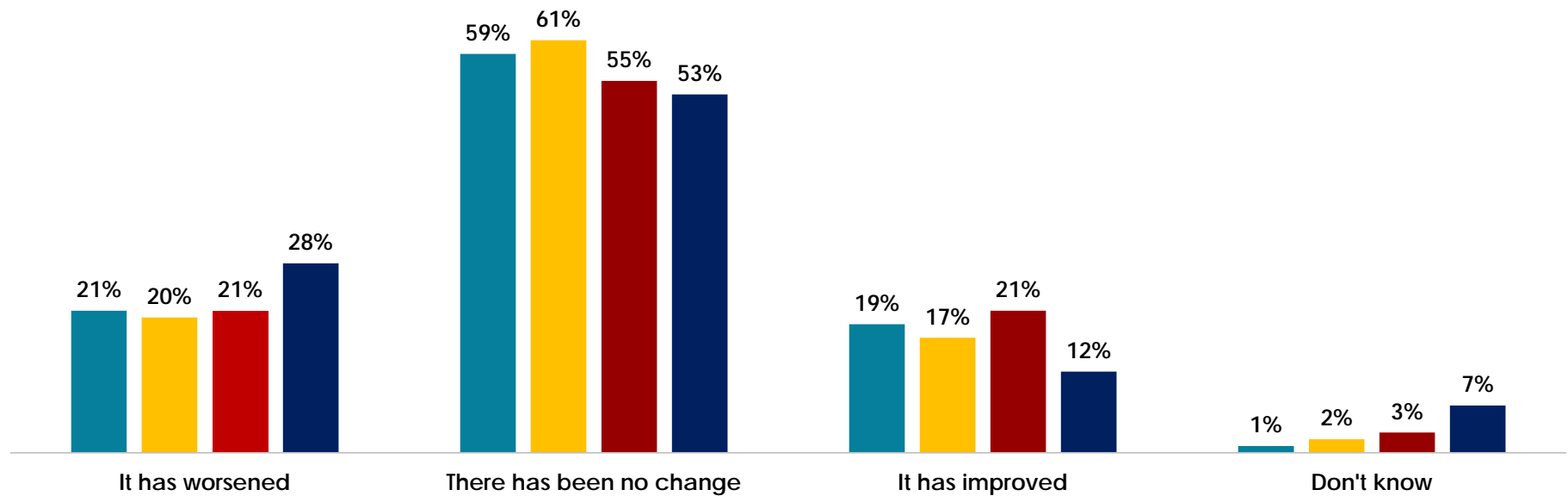
- Representative of U.S. adults in terms of age, gender, social class and education



Travelers' Pandemic Outlook

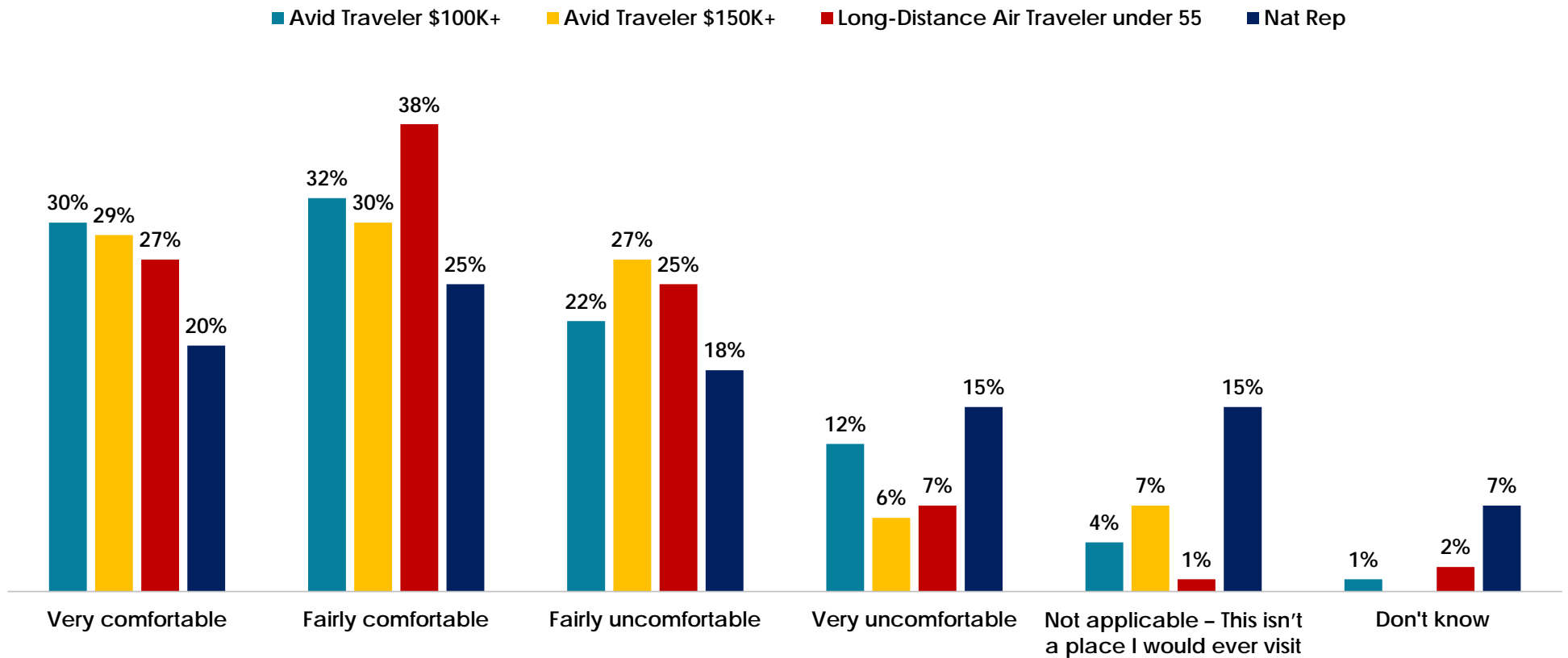
How has your household economic situation changed in the past month?

■ 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 October 9, 2022

Level of comfort visiting an airport right now



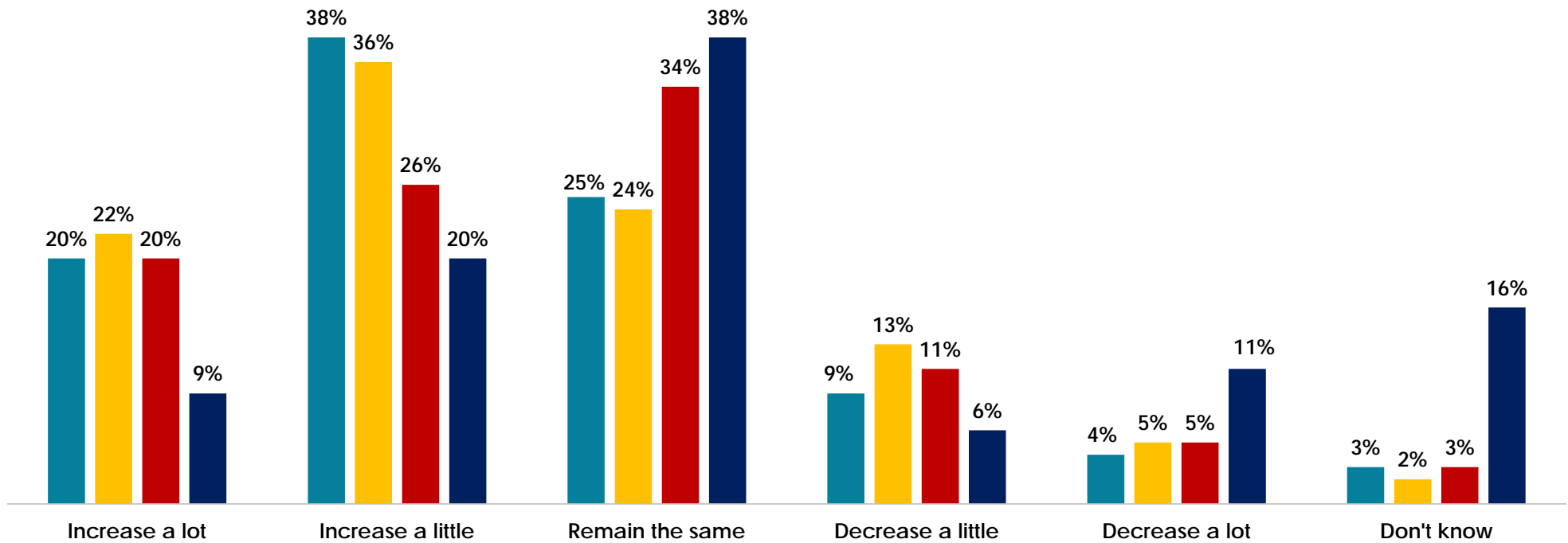
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Future Travel Plans

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

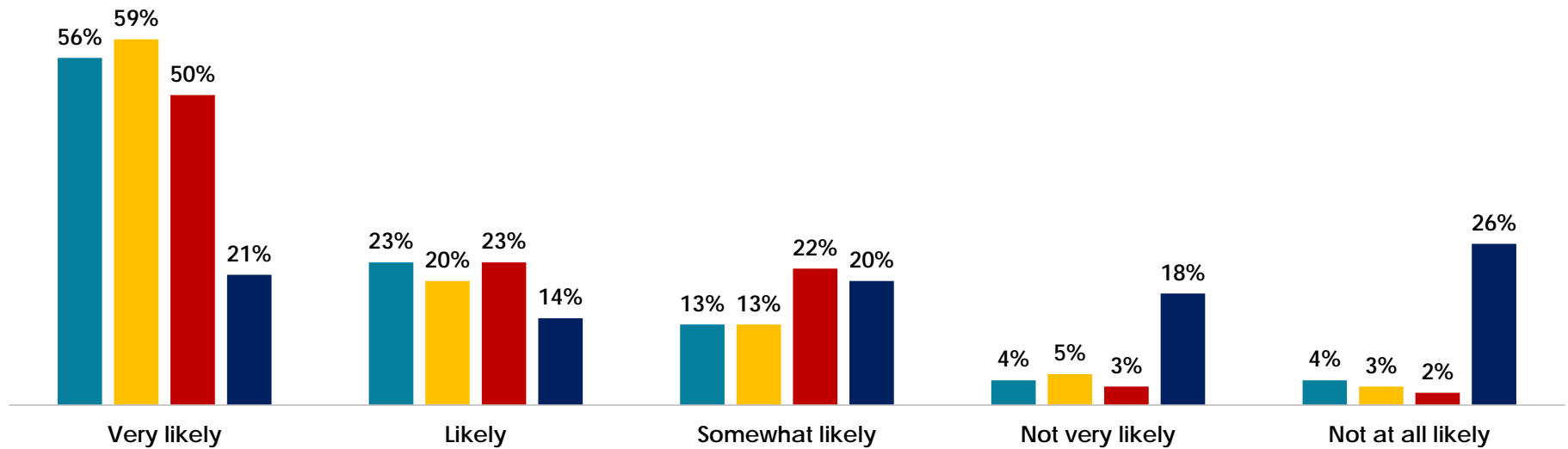
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Future Travel – Likelihood of purchasing travel or leisure services in the next 12 months

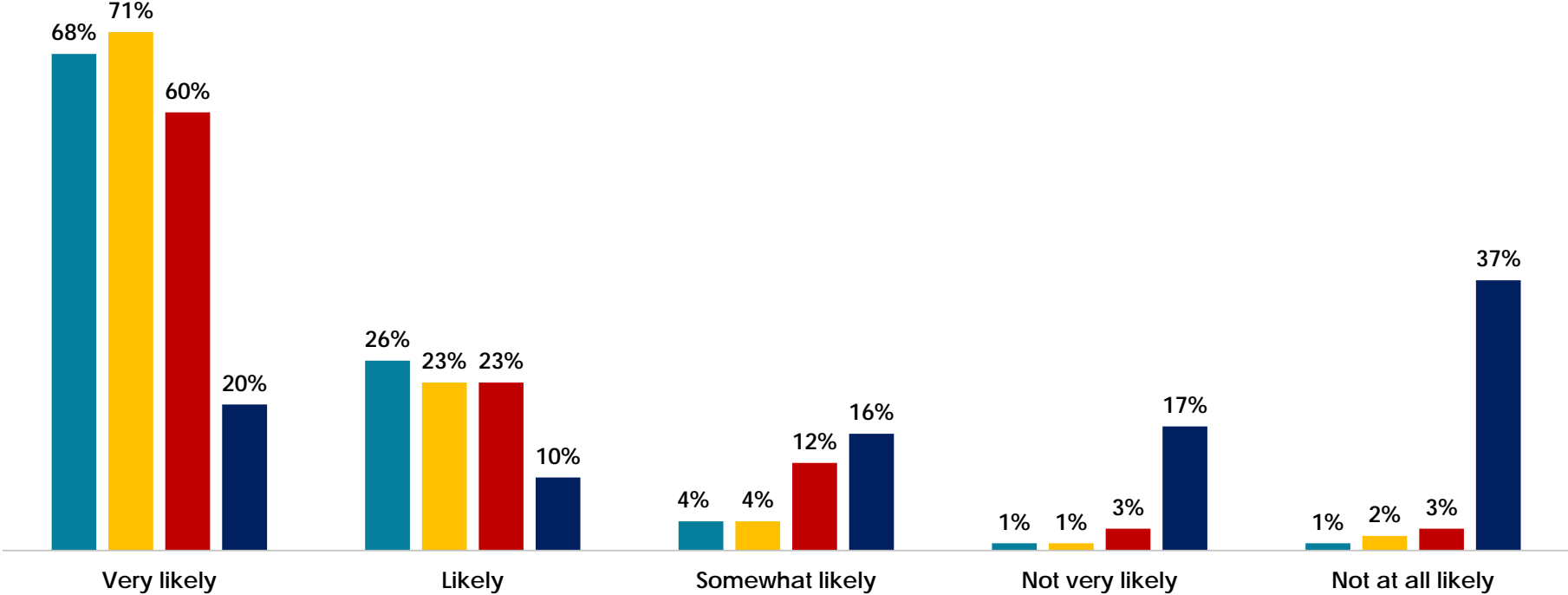
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Future Travel – Likelihood of booking a flight in the next 12 months

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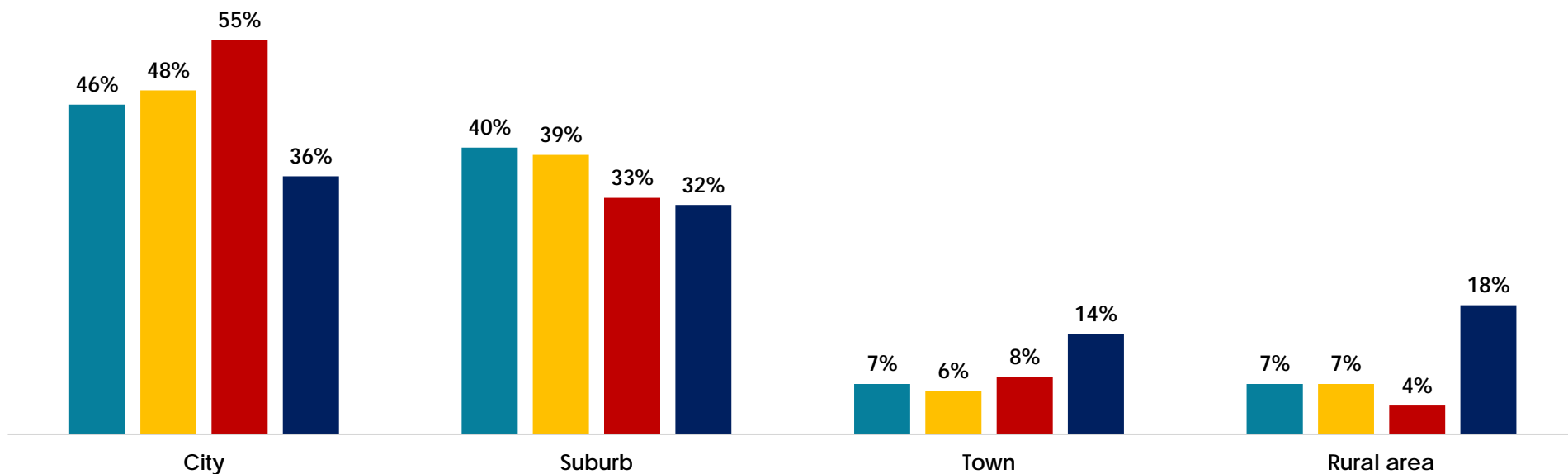


Traveler Profiles

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

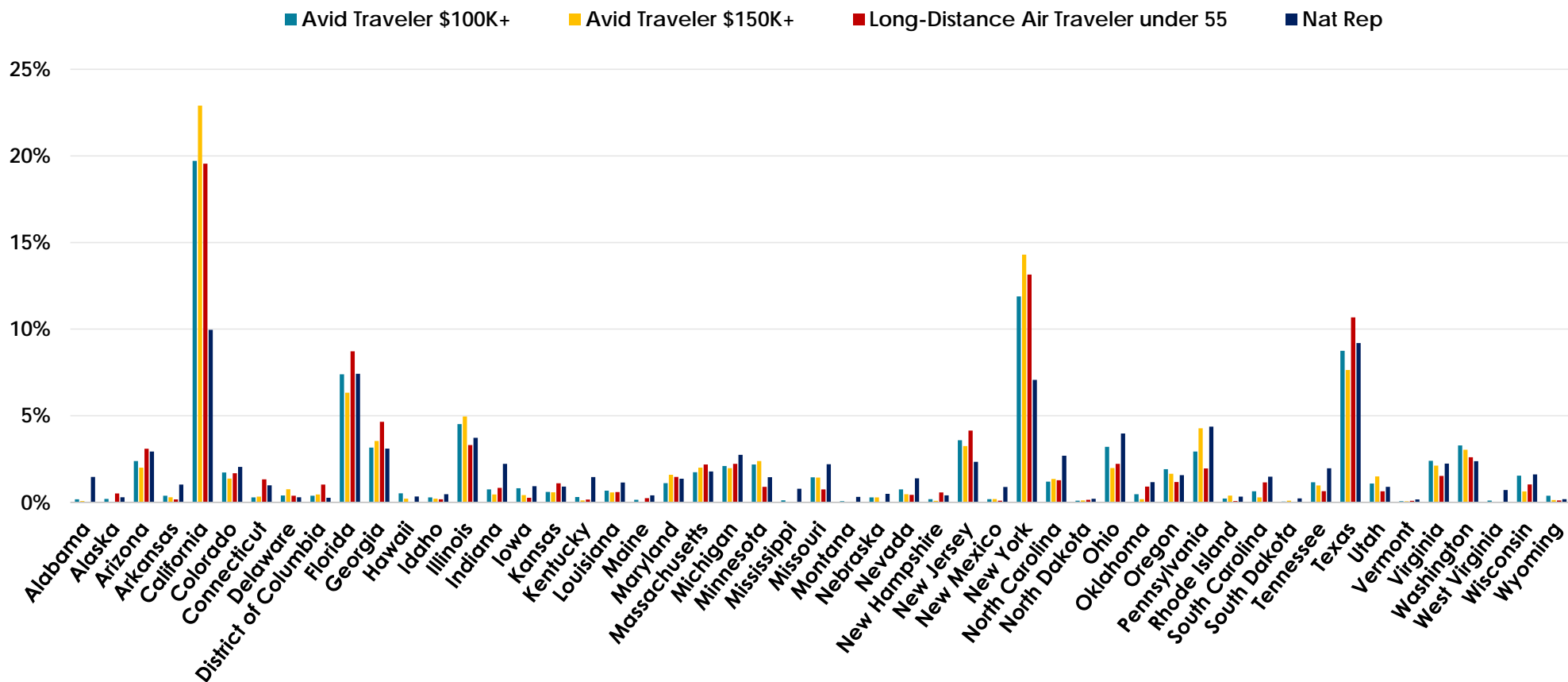
Type of Area Living In

■ Avid Traveler \$100K+
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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	19.7%
New York	11.9%
Texas	8.7%
Florida	7.4%
Illinois	4.5%
New Jersey	3.6%
Washington	3.3%
Ohio	3.2%
Georgia	3.2%
Pennsylvania	2.9%

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

California	24.7%
New York	13.1%
Texas	8.7%
Florida	5.6%
Illinois	4.0%
Pennsylvania	4.0%
Georgia	3.5%
New Jersey	3.2%
Washington	3.0%
Minnesota	2.6%

Long-Distance Air Traveler under 55

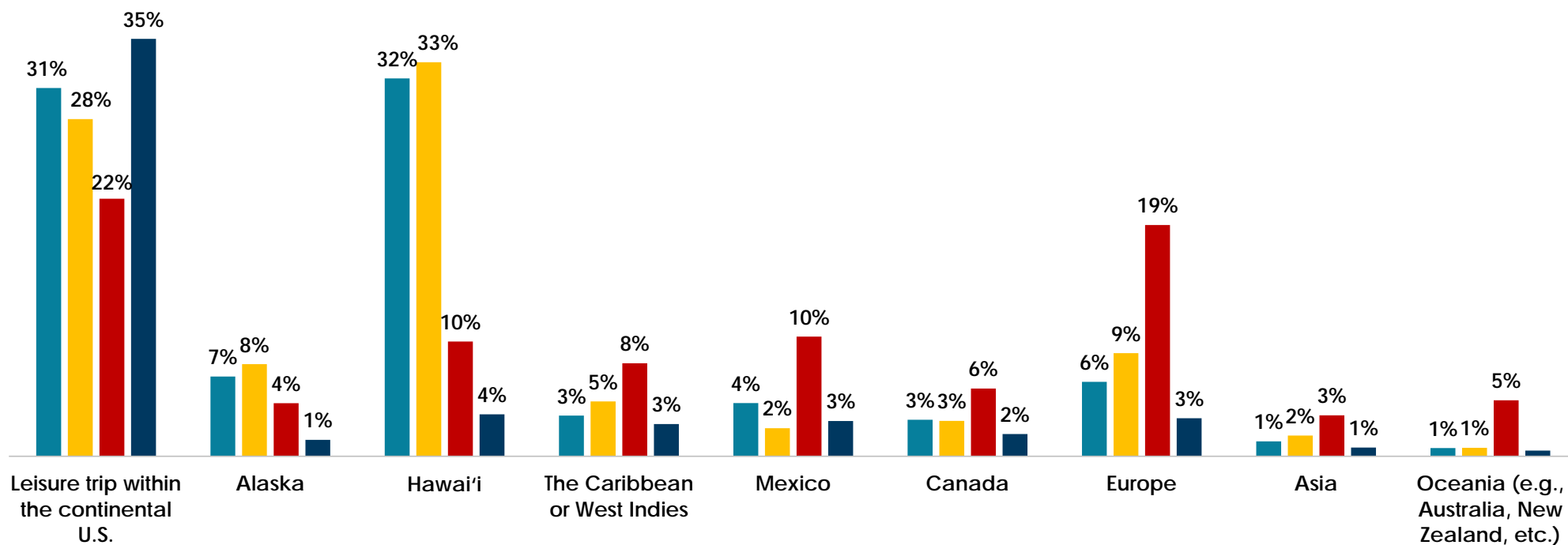
California	19.6%
New York	13.1%
Texas	10.7%
Florida	8.7%
Georgia	4.6%
New Jersey	4.1%
Illinois	3.3%
Arizona	3.1%
Washington	2.6%
Ohio	2.2%

Nat Rep

California	10.0%
Texas	9.2%
Florida	7.4%
New York	7.1%
Pennsylvania	4.4%
Ohio	4.0%
Illinois	3.7%
Georgia	3.1%
Arizona	2.9%
Michigan	2.7%

Leisure trip – most recent destination

■ Avid Traveler \$100K+
 ■ Avid Traveler \$150K+
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 ■ Nat Rep

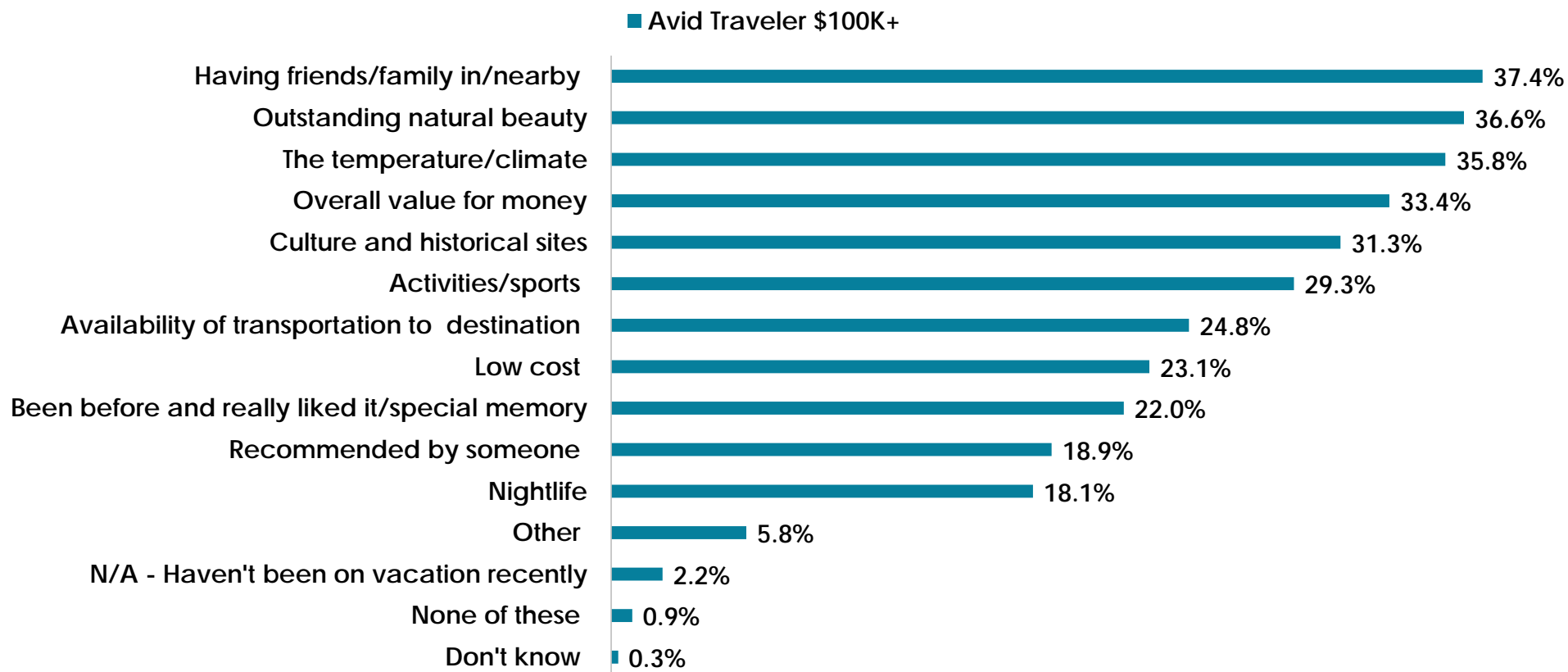


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Reason for choosing most recent leisure destination

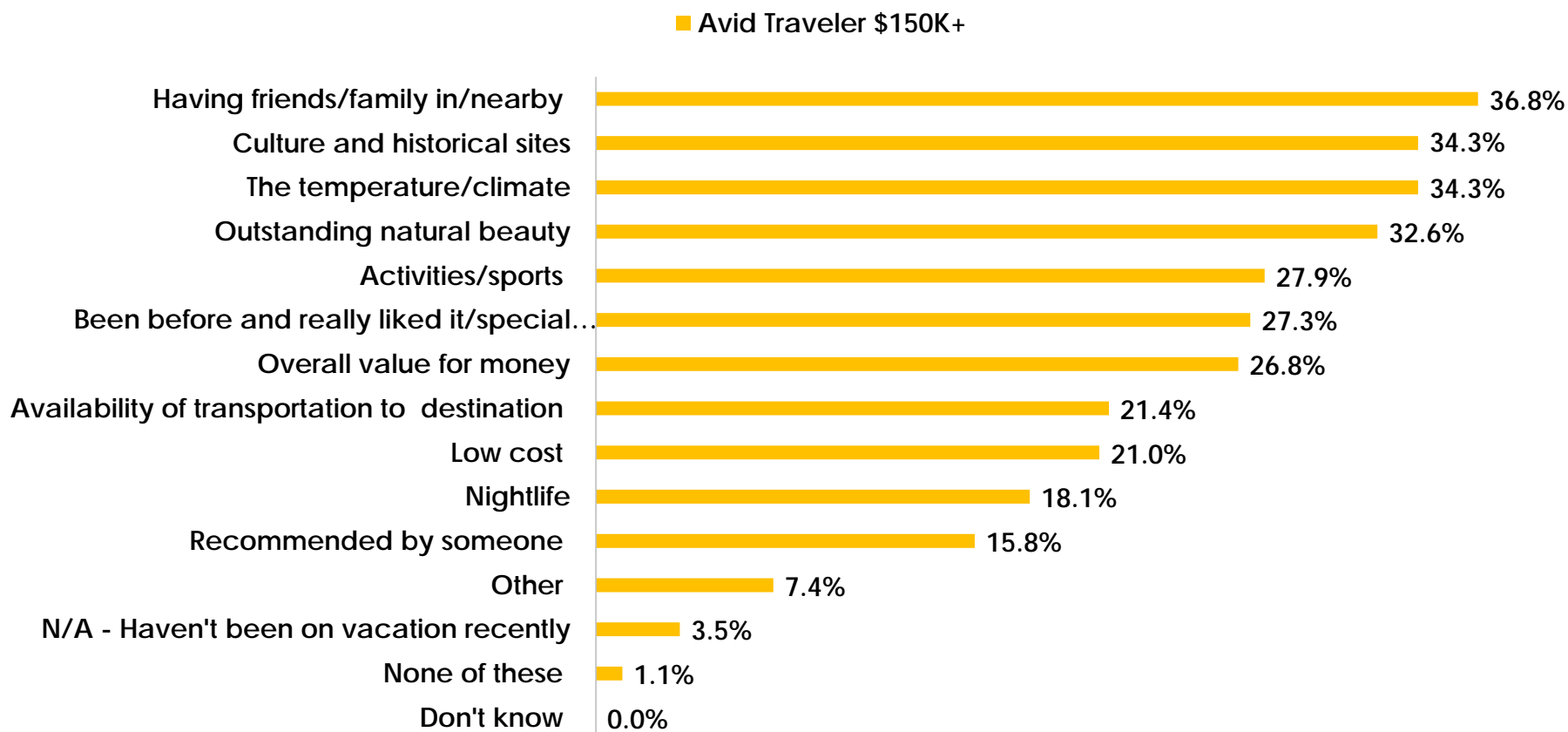
Reasons	Avid Traveler \$100K, 25-54, individual	Avid Traveler \$150K, 25-54, 2+ household	Long-Distance Air Traveler under 55	Nat Rep
The temperature/climate	35.8%	34.3%	32.7%	22.8%
Availability of transportation to destination	24.8%	21.4%	34.6%	14.2%
Culture and historical sites	31.3%	34.3%	45.5%	17.8%
Overall value for money	33.4%	26.8%	35.1%	29.3%
Activities/sports	29.3%	27.9%	35.7%	16.3%
Outstanding natural beauty	36.6%	32.6%	34.9%	23.1%
Nightlife	18.1%	18.1%	26.2%	9.2%
Having friends/family in/nearby	37.4%	36.8%	50.0%	26.0%
Low cost	23.1%	21.0%	33.3%	23.0%
Been before and really liked it/special memory	22.0%	27.3%	29.1%	19.0%
Recommended by someone	18.9%	15.8%	31.4%	13.9%
Other	5.8%	7.4%	8.0%	6.8%
Don't know	0.3%	0.0%	1.6%	2.0%
None of these	0.9%	1.1%	2.1%	2.7%
N/A - Haven't been on vacation recently	2.2%	3.5%	1.8%	22.5%

Reason for choosing most recent leisure destination



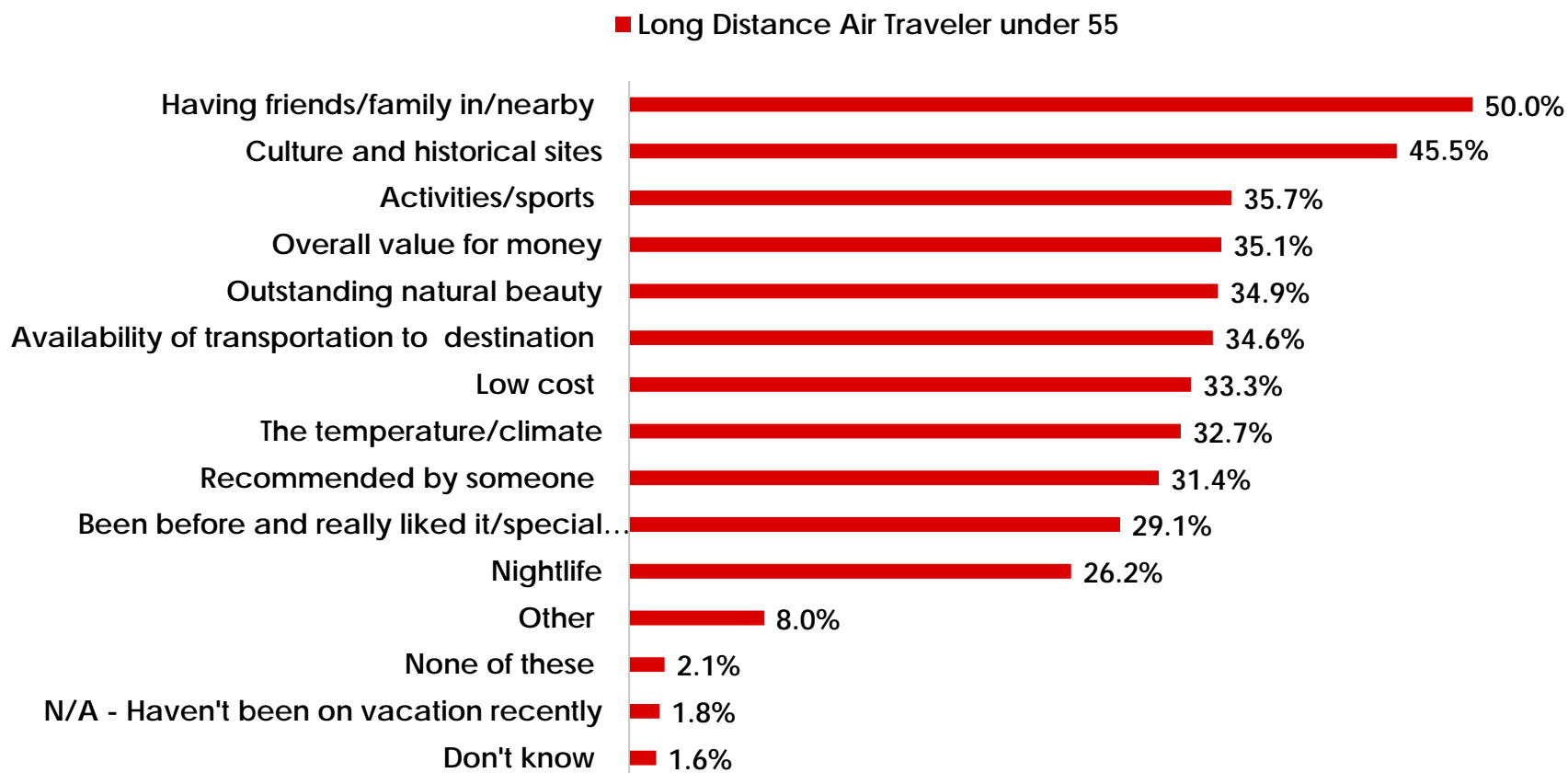
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Reason for choosing most recent leisure destination



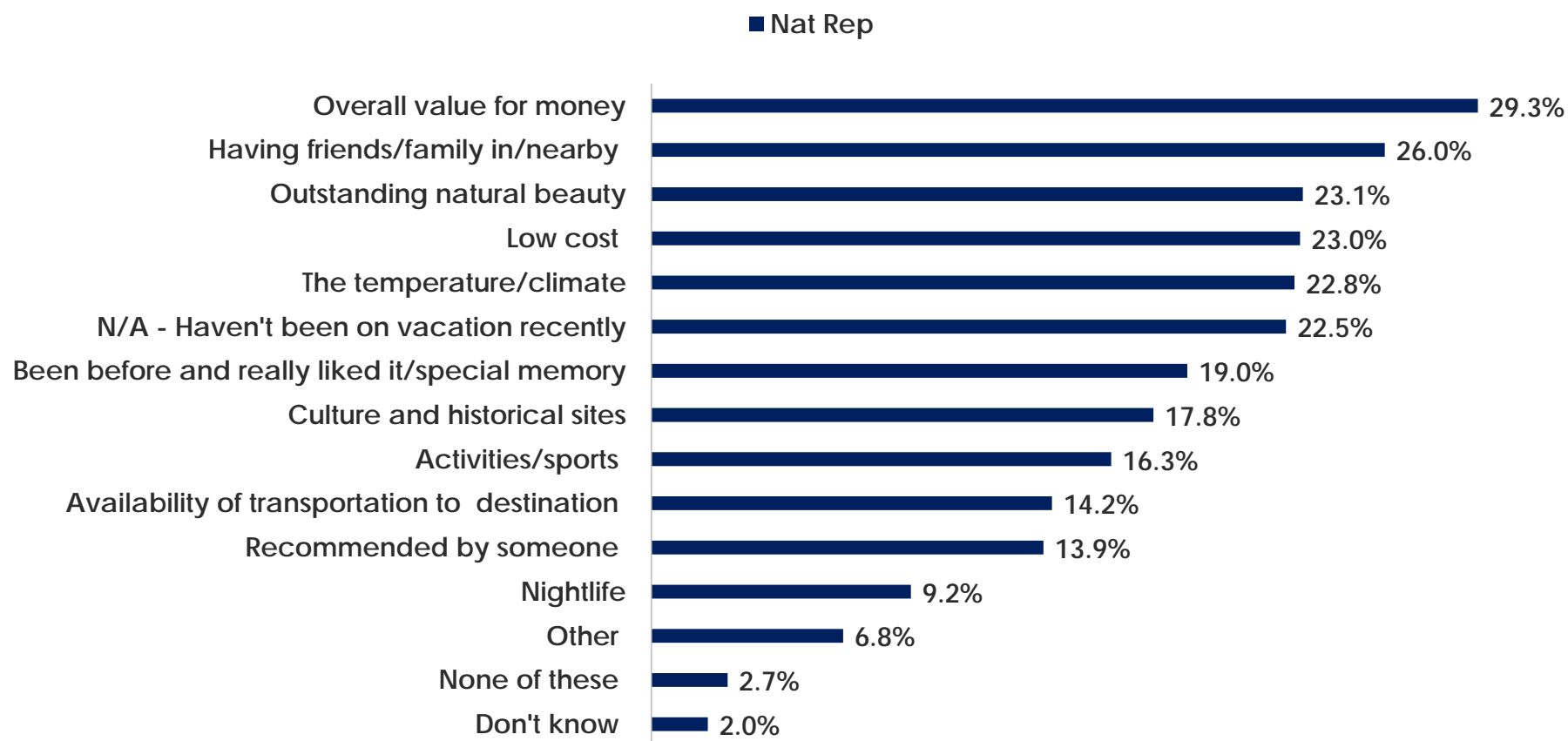
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Reason for choosing most recent leisure destination



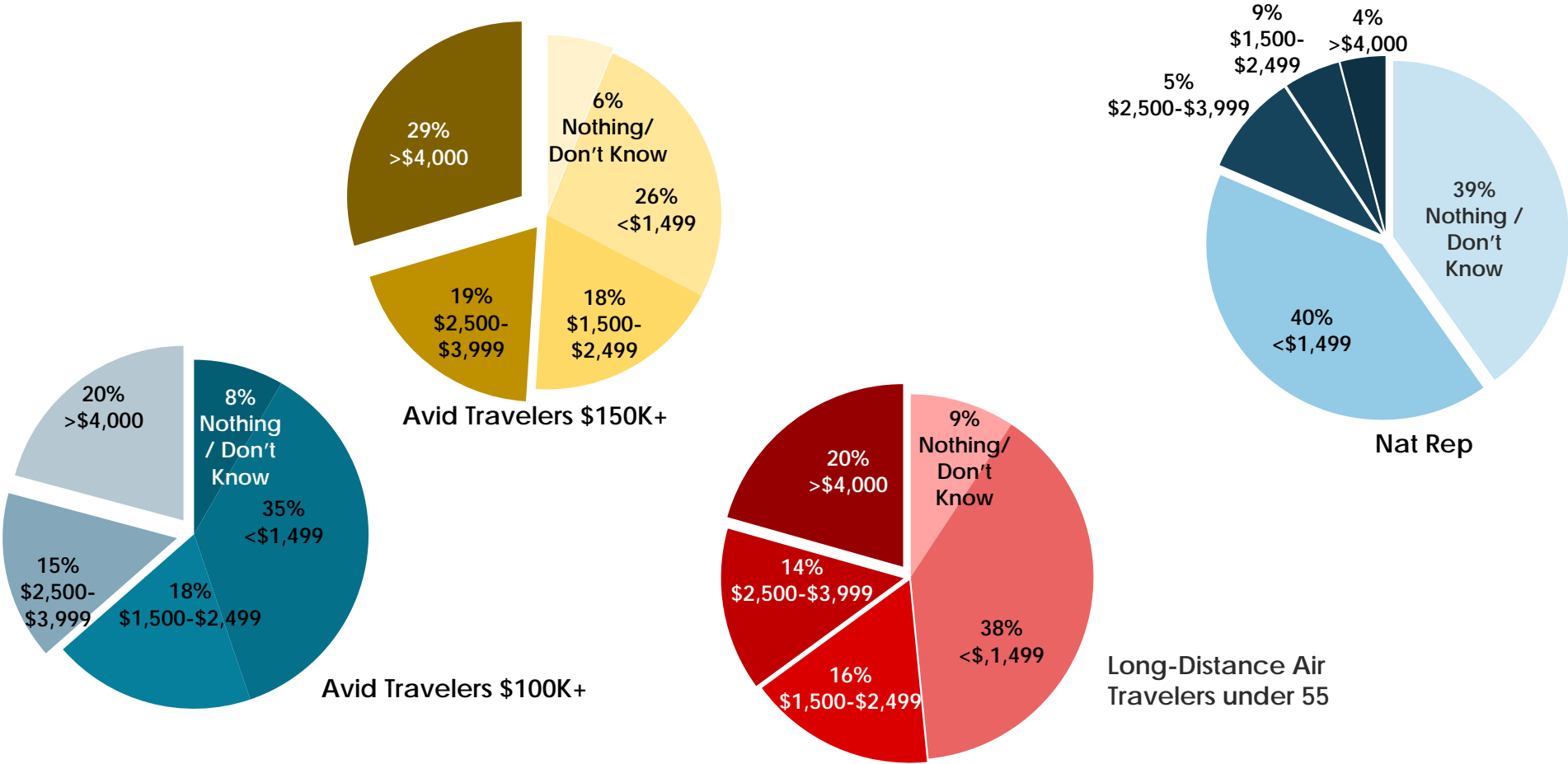
Source: HVCB analysis of YouGov data provided by HTA as of October 9, 2022

Reason for choosing most recent leisure destination



Source: HVCB analysis of YouGov data provided by HTA as of October 9, 2022

Most recent leisure trip - total spend

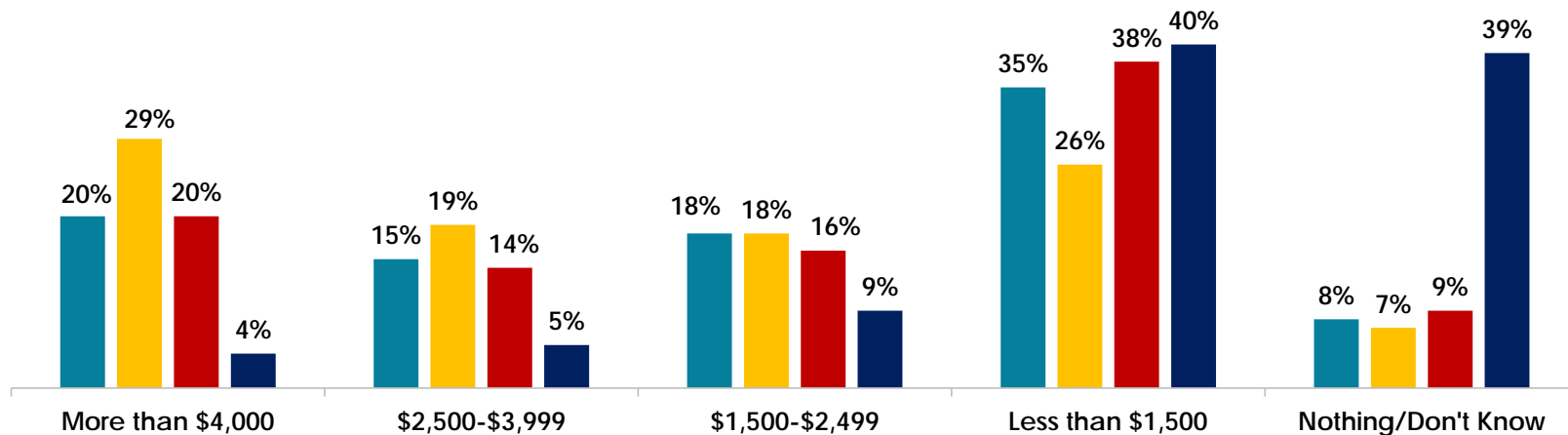


Based on Hawai'i Tourism Authority data, the average U.S. per person per trip spend for 2019 was \$1,693.32.

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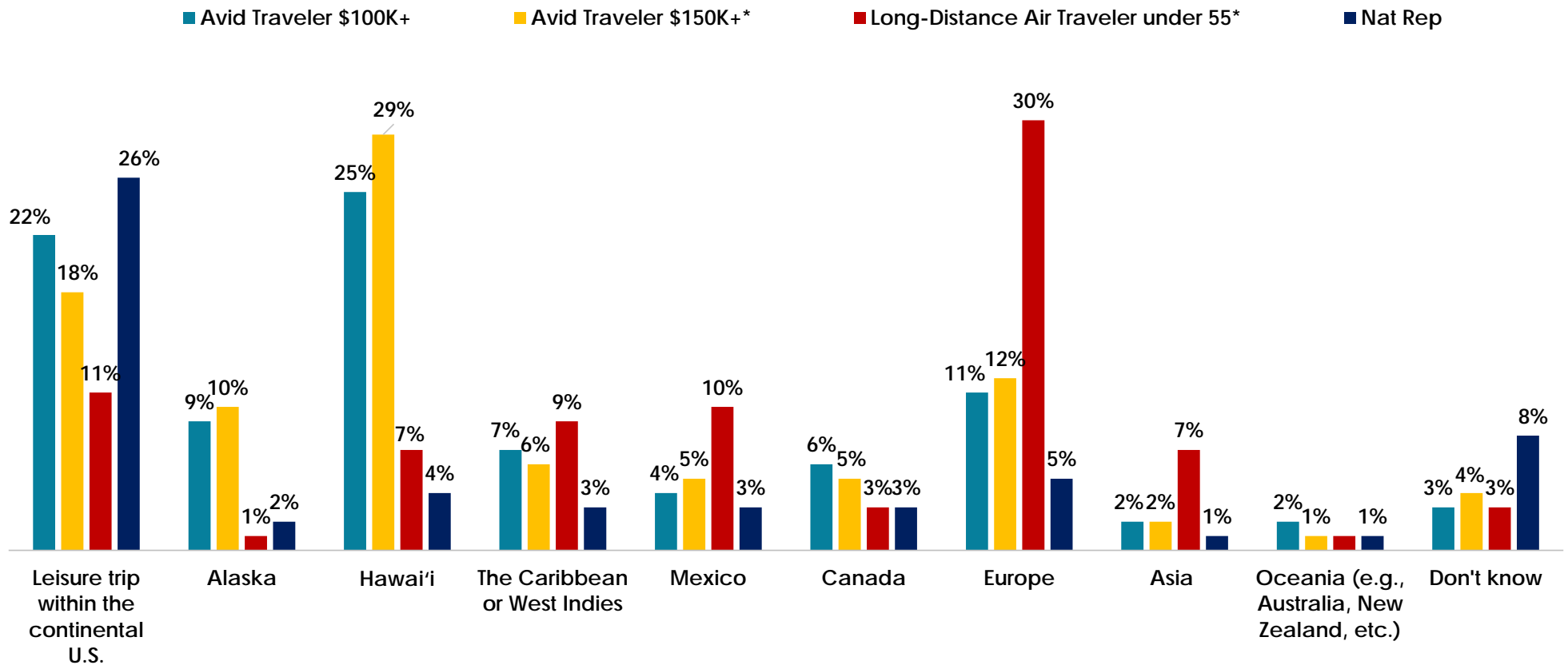
Most recent leisure trip - total spend

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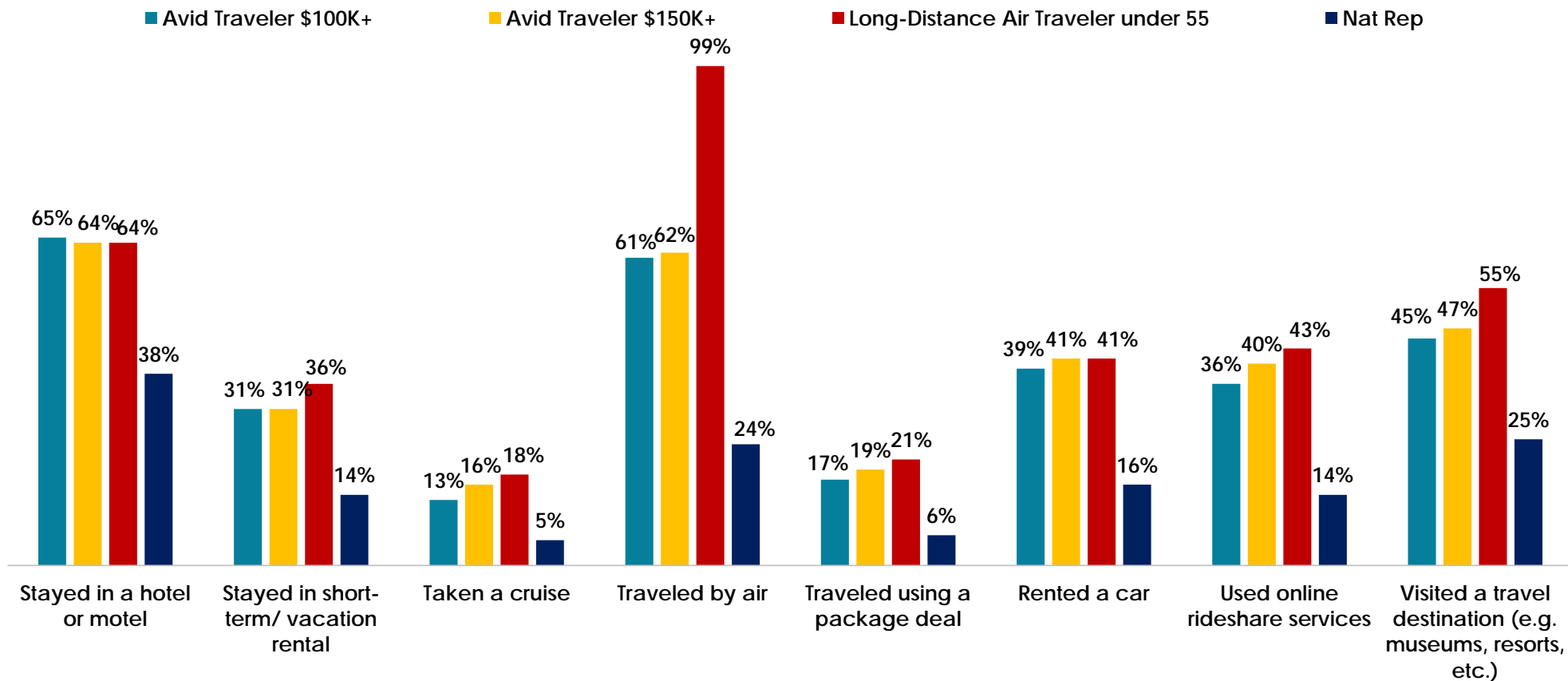
Leisure trip - next destination



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Source: HVCB analysis of YouGov data provided by HTA as of October 9, 2022

Leisure trip - activities in last 12 months



Source: HVCB analysis of YouGov data provided by HTA as of October 9, 2022

Travel Mindset

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Travel Activities

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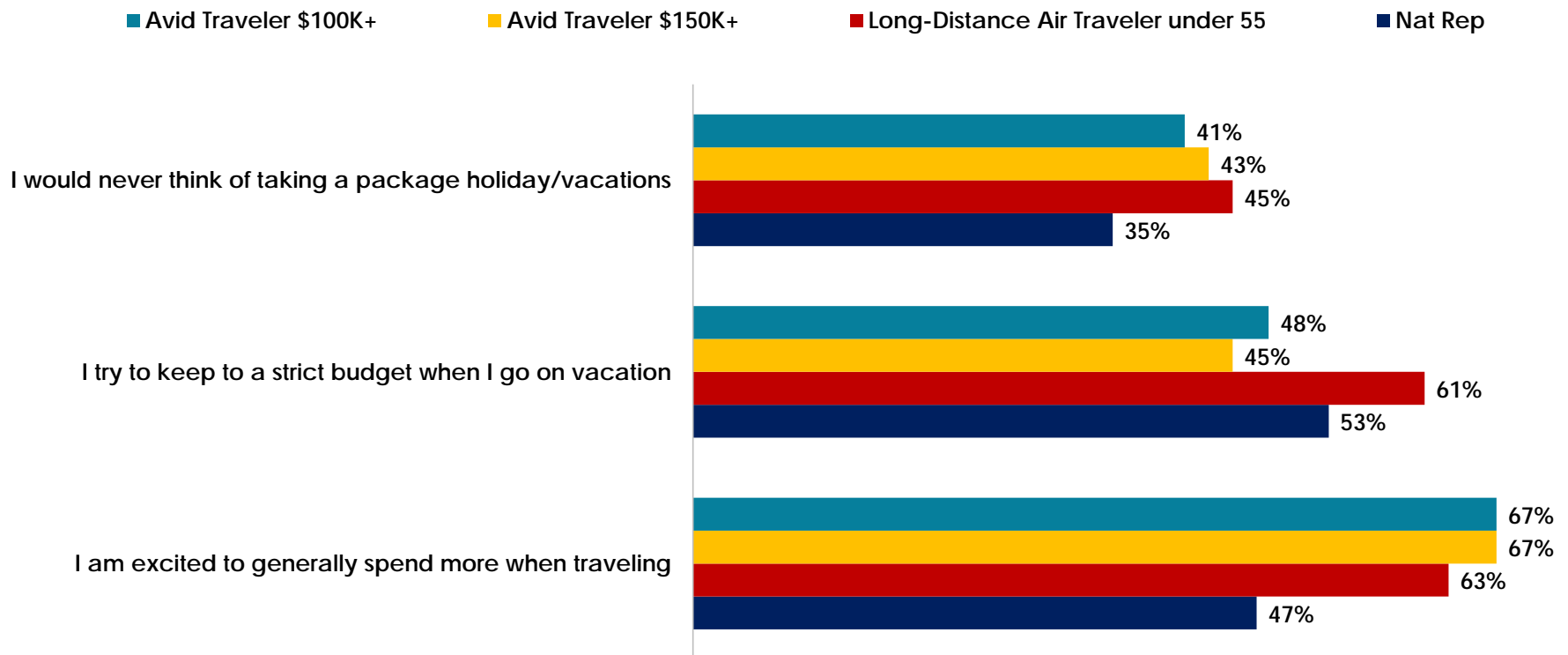
Booking & Spending Attitudes

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Booking & Spending Attitudes



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