

COVID-19 Impact on U.S. Avid Travelers

An HVCB analysis of YouGov data provided by HTA as of December 5, 2021

Reported on December 16, 2021



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

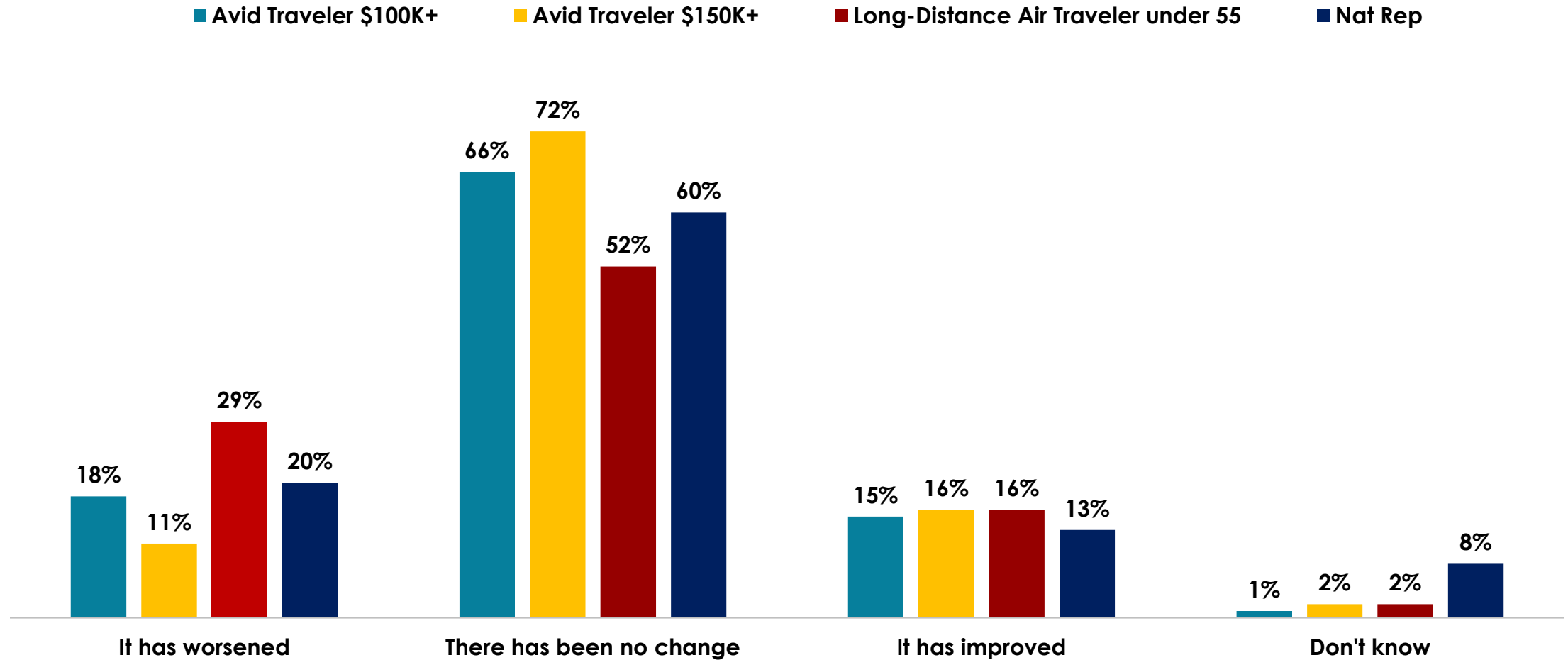
Nationally Representative Sample (Nat Rep)

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

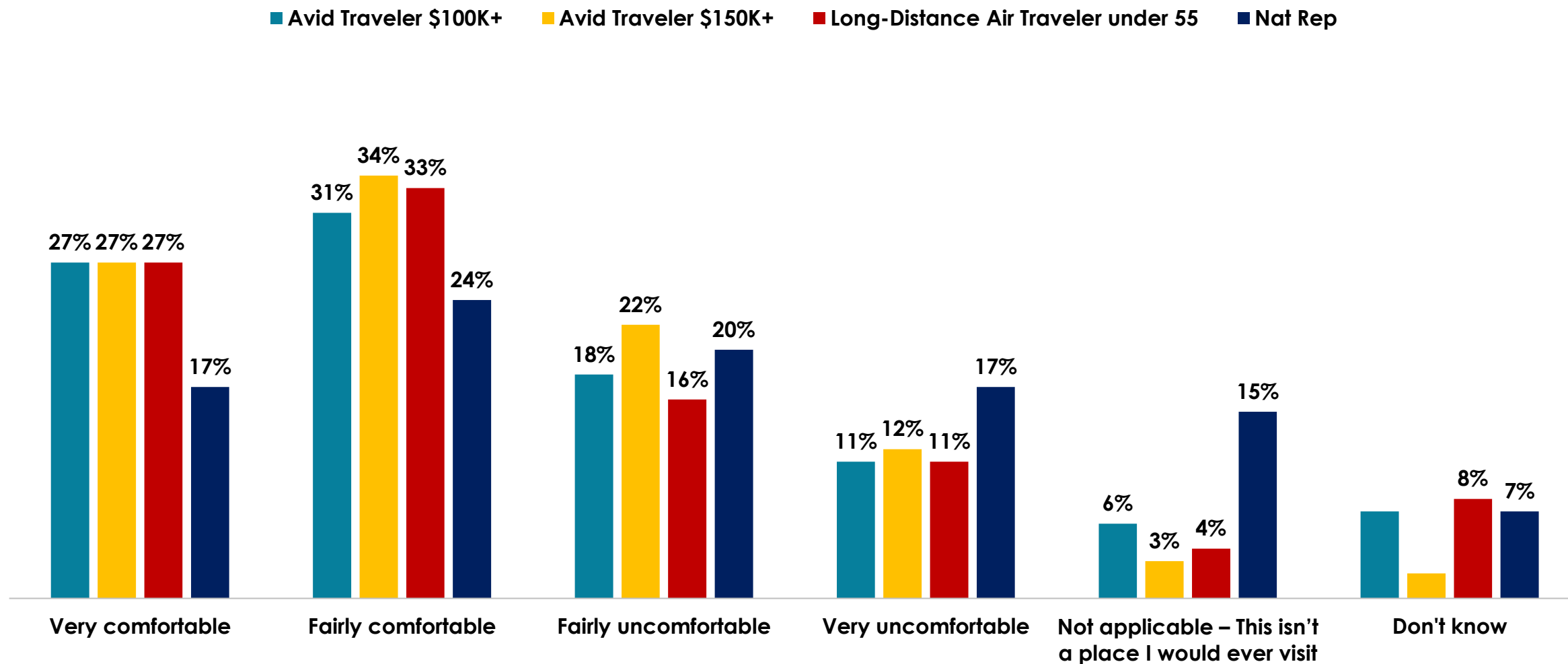


Travelers' Pandemic Outlook

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



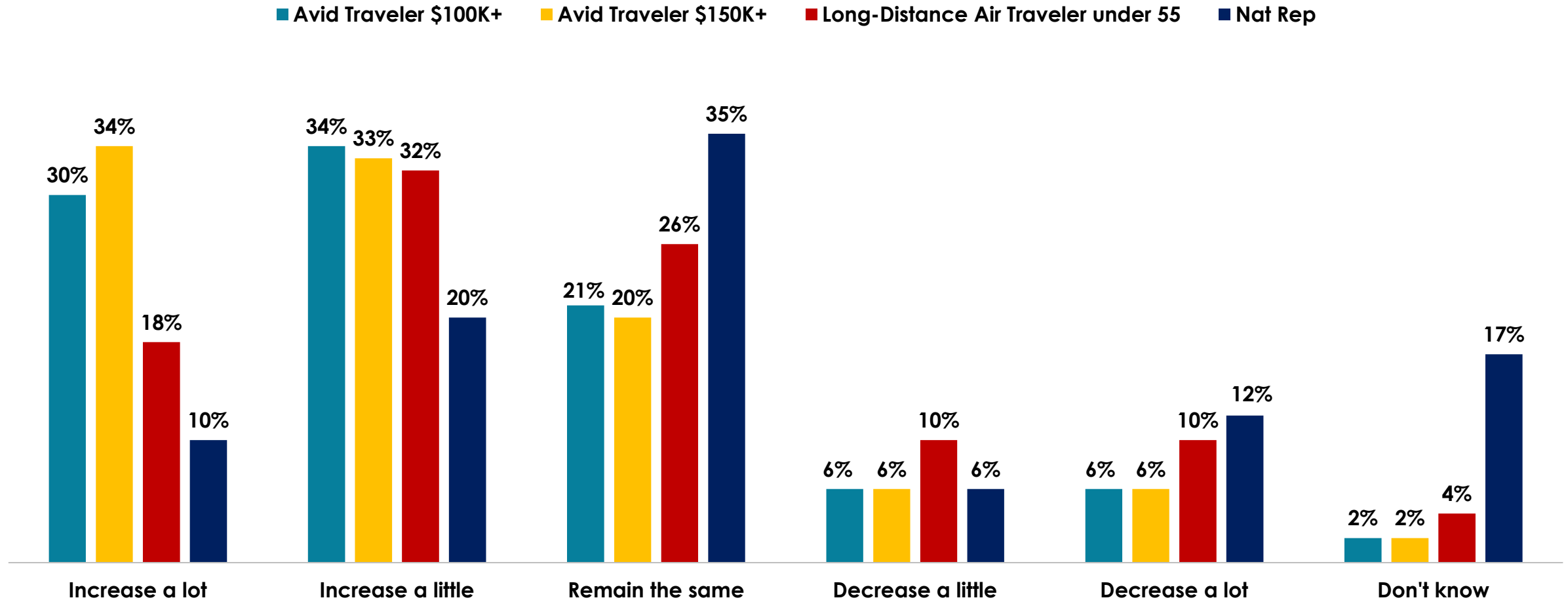
Level of comfort visiting an airport right now



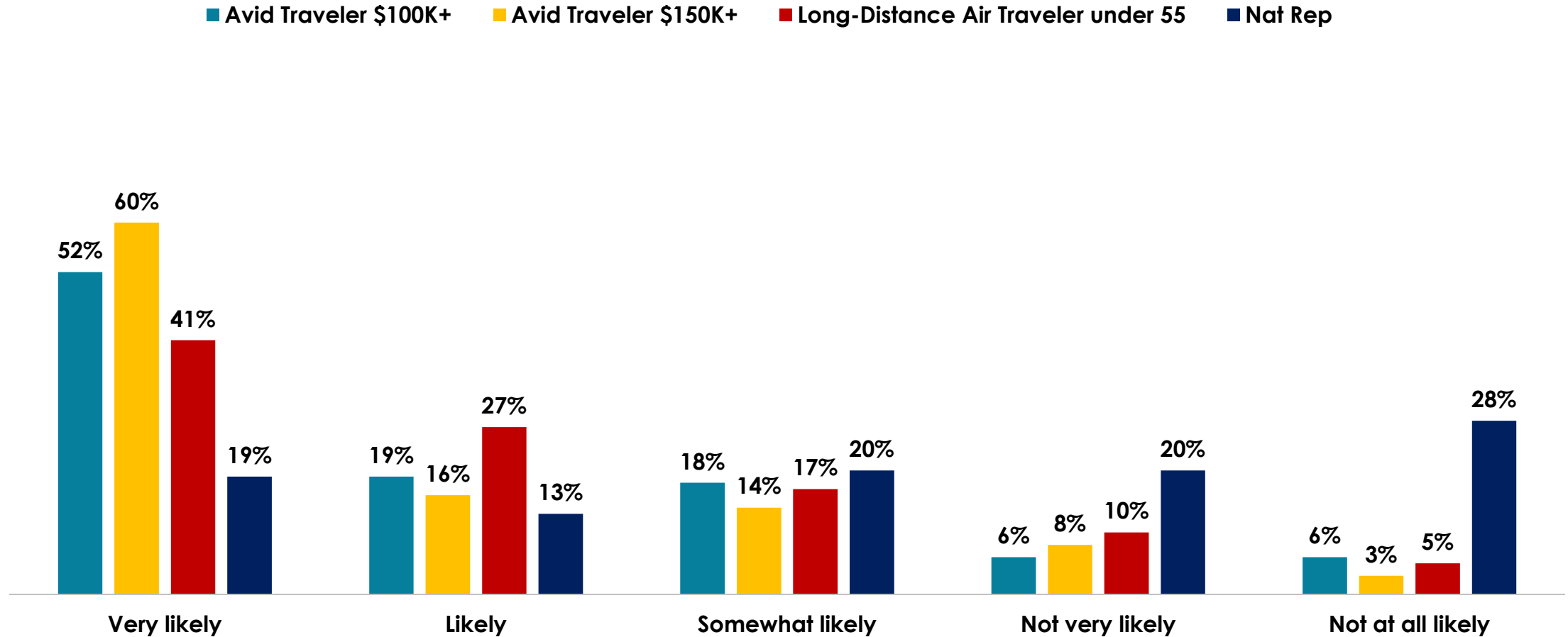


Future Travel Plans

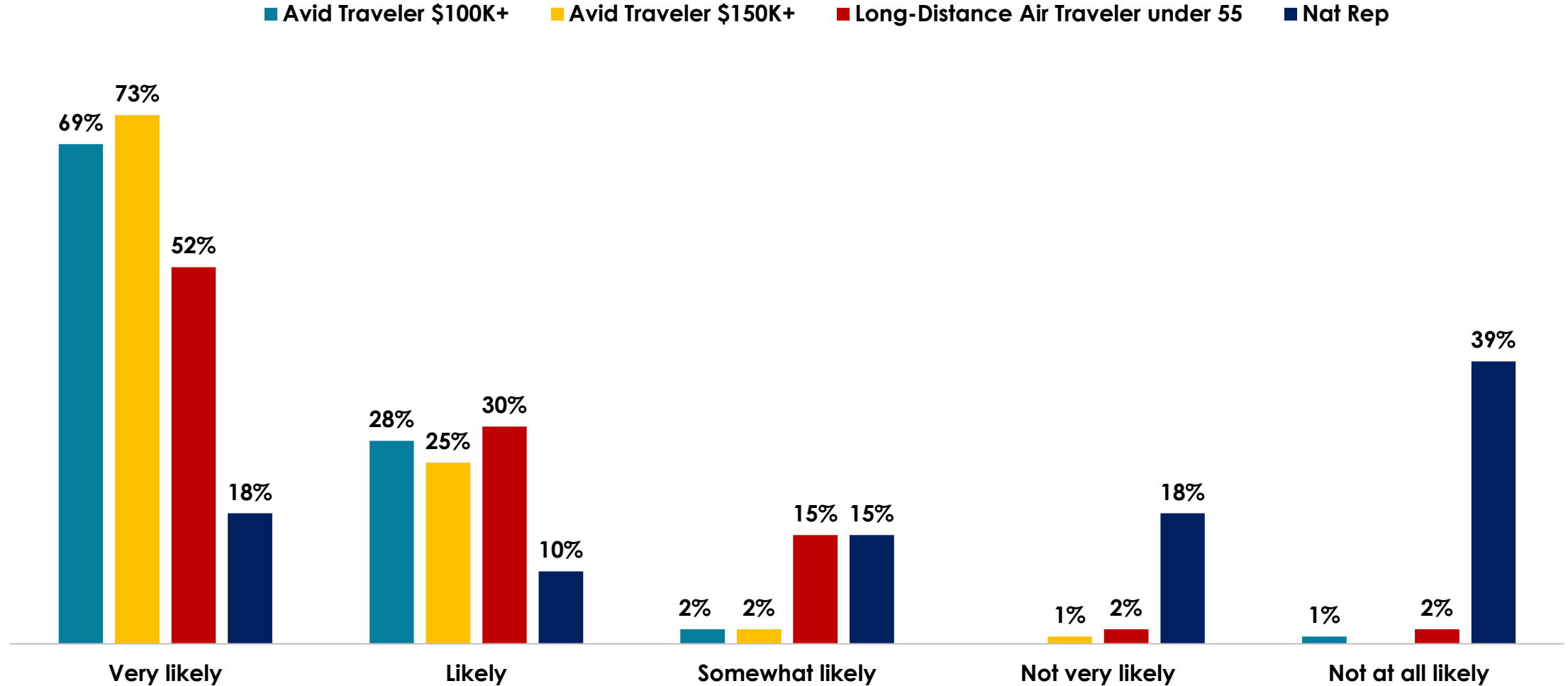
Future Travel – Expected change to air travel in the next 12 months



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



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



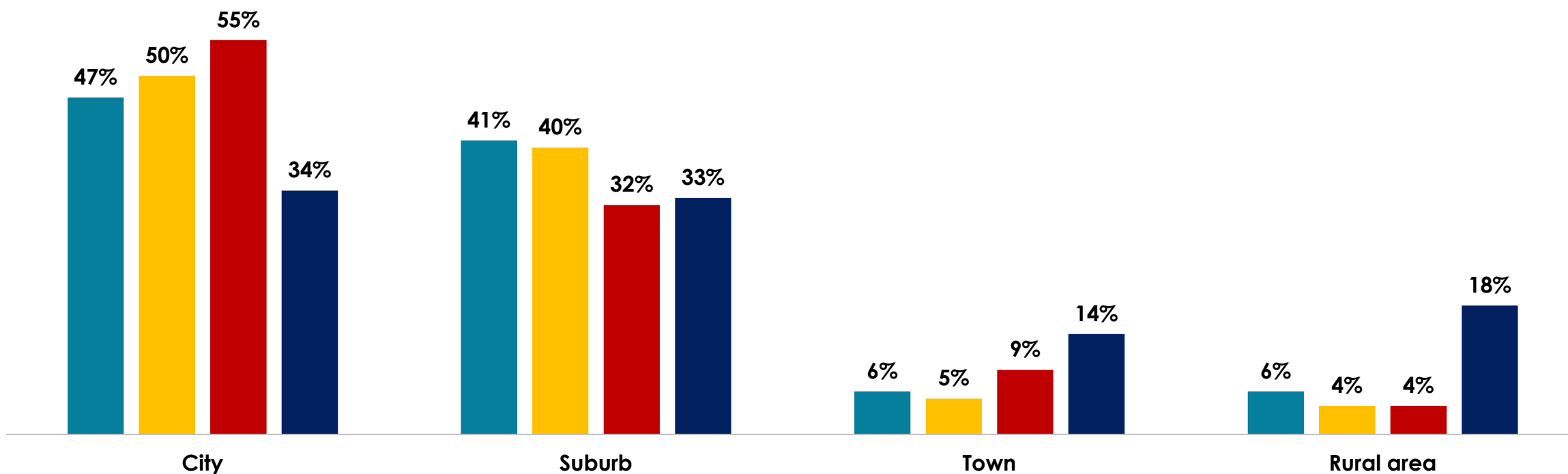


Traveler Profiles

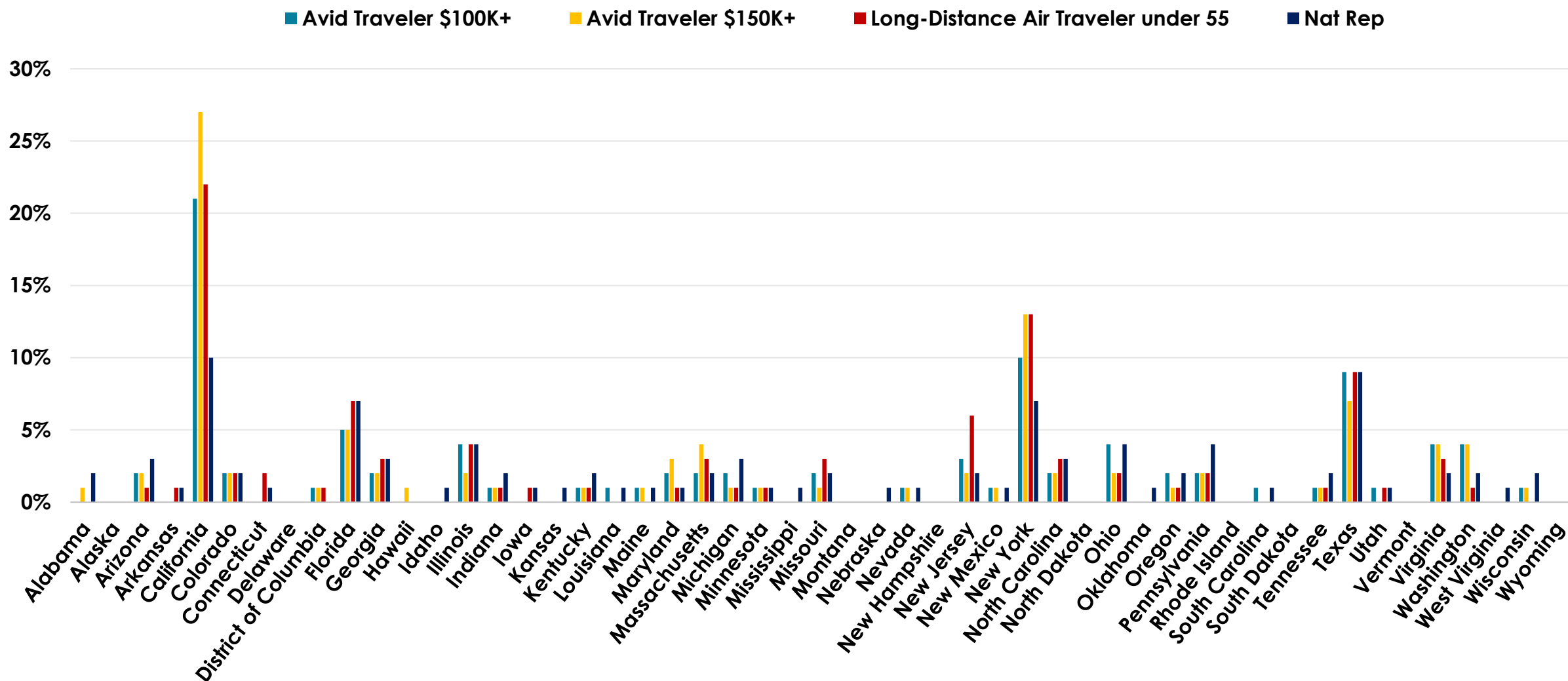
Avid Travelers vs. Long-Distance Air Travelers vs. Nat. Rep.

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	20.7%
New York	10.1%
Texas	9.1%
Florida	5.5%
Washington	4.3%
Illinois	3.9%
Virginia	3.5%
Ohio	3.5%
New Jersey	2.7%
Massachusetts	2.4%

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

California	26.5%
New York	13.1%
Texas	7.4%
Florida	4.5%
Washington	4.4%
Massachusetts	3.7%
Virginia	3.6%
Maryland	2.8%
Georgia	2.4%
New Jersey	2.4%

Long-Distance Air Traveler under 55

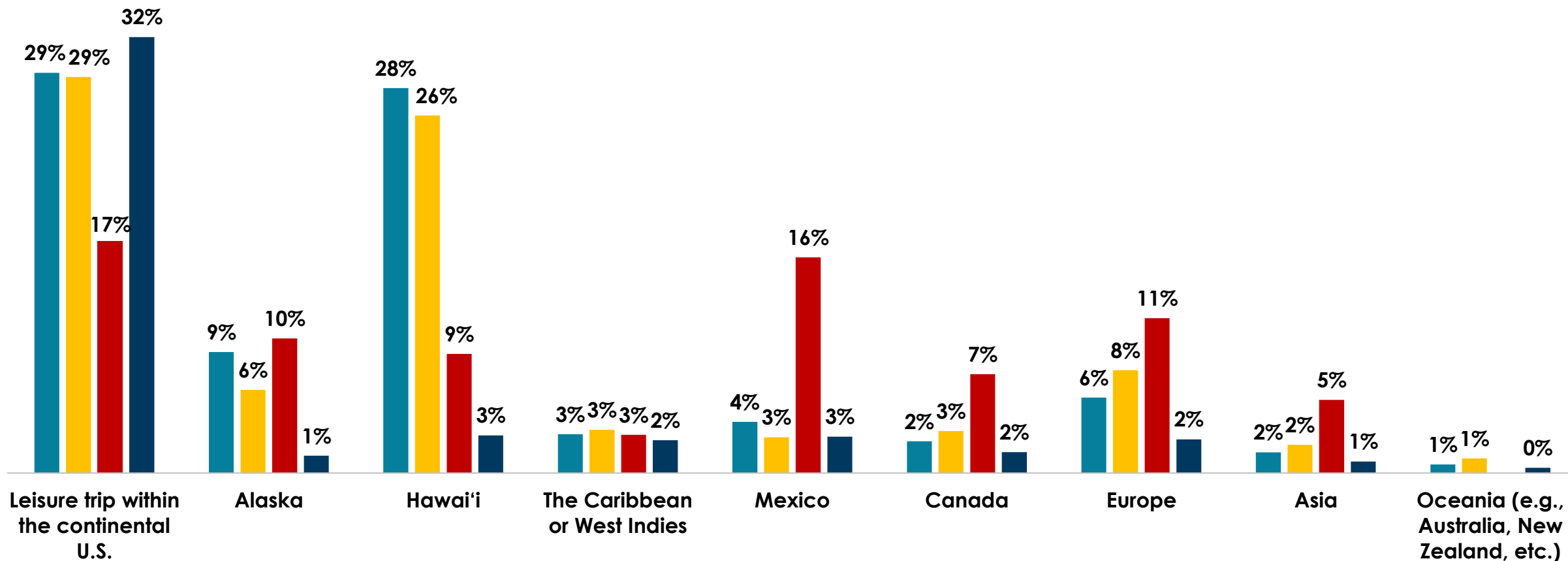
California	22.1%
New York	12.7%
Texas	8.7%
Florida	6.6%
New Jersey	5.8%
Illinois	4.3%
Virginia	3.3%
North Carolina	2.7%
Massachusetts	2.7%
Georgia	2.7%

Nat Rep

California	10.4%
Texas	8.9%
Florida	7.1%
New York	6.6%
Pennsylvania	4.3%
Ohio	3.7%
Illinois	3.6%
Georgia	3.2%
North Carolina	2.9%
Michigan	2.8%

Leisure trip – most recent destination

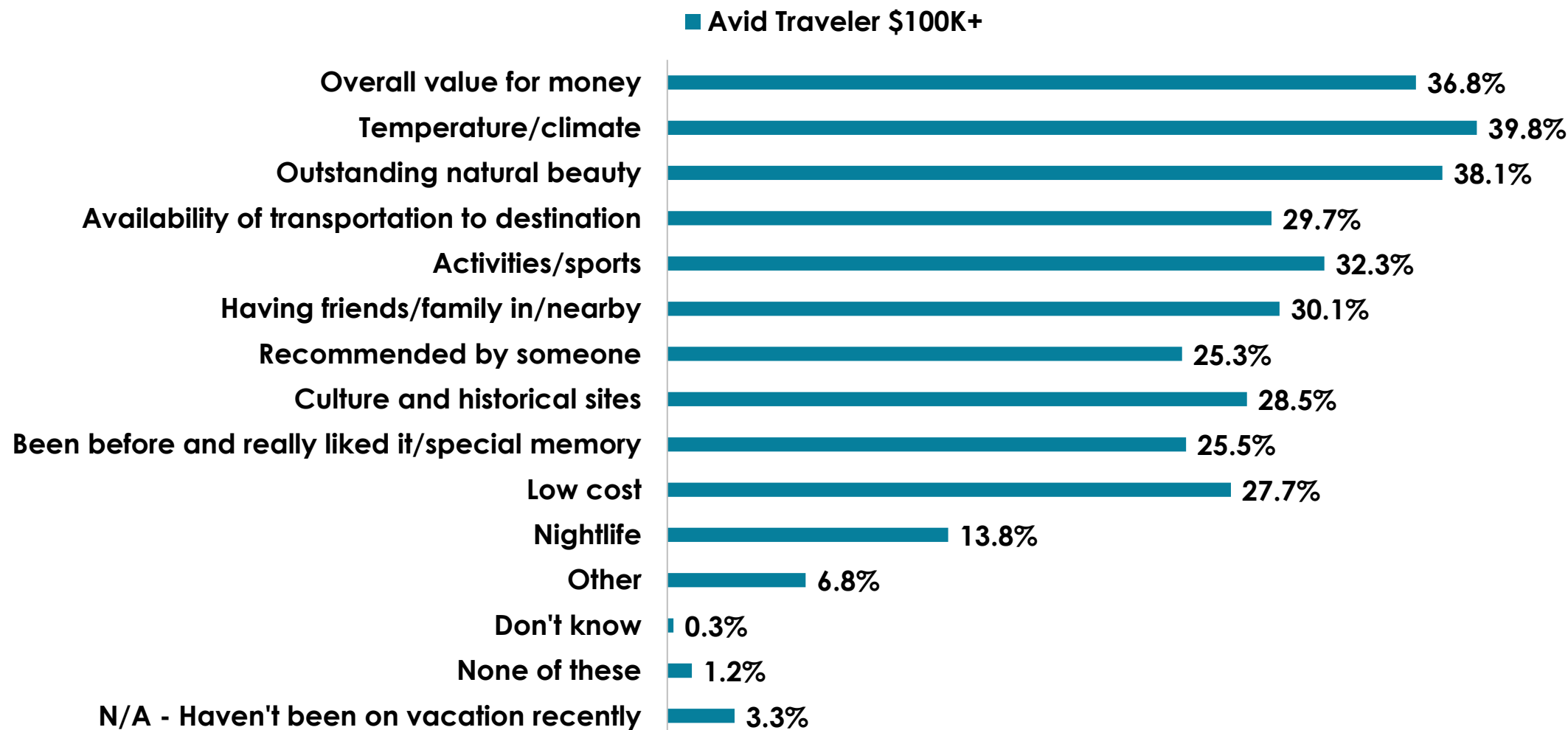
■ Avid Traveler \$100K+
 ■ Avid Traveler \$150K+
 ■ Long-Distance Air Traveler under 55
 ■ Nat Rep



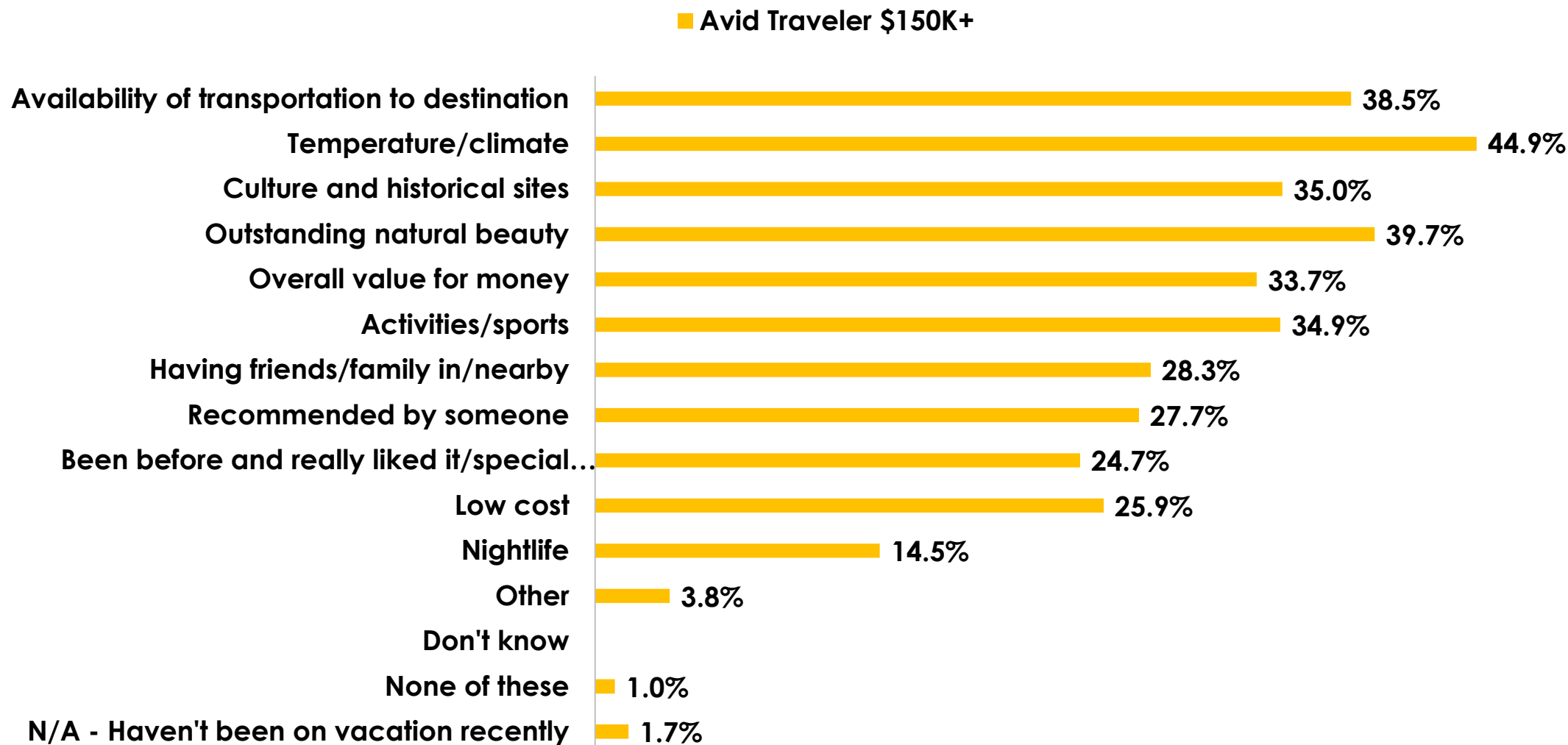
Reason for choosing most recent leisure destination

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	39.8%	44.9%	35.0%	24.2%
Availability of transportation to destination	29.7%	38.5%	32.0%	14.1%
Culture and historical sites	28.5%	35.0%	28.1%	18.3%
Overall value for money	36.8%	33.7%	30.2%	30.8%
Activities/sports	32.3%	34.9%	33.1%	16.0%
Outstanding natural beauty	38.1%	39.7%	26.4%	24.4%
Nightlife	13.8%	14.5%	23.4%	7.8%
Having friends/family in/nearby	30.1%	28.3%	30.4%	24.4%
Low cost	27.7%	25.9%	24.0%	22.8%
Been before and really liked it/special memory	25.5%	24.7%	26.1%	18.8%
Recommended by someone	25.3%	27.7%	32.0%	13.0%
Other	6.8%	3.8%	5.7%	6.4%
Don't know	0.3%	0.0%	0.0%	2.1%
None of these	1.2%	1.0%	4.3%	2.3%
N/A - Haven't been on vacation recently	3.3%	1.7%	1.8%	24.6%

Reason for choosing most recent leisure destination

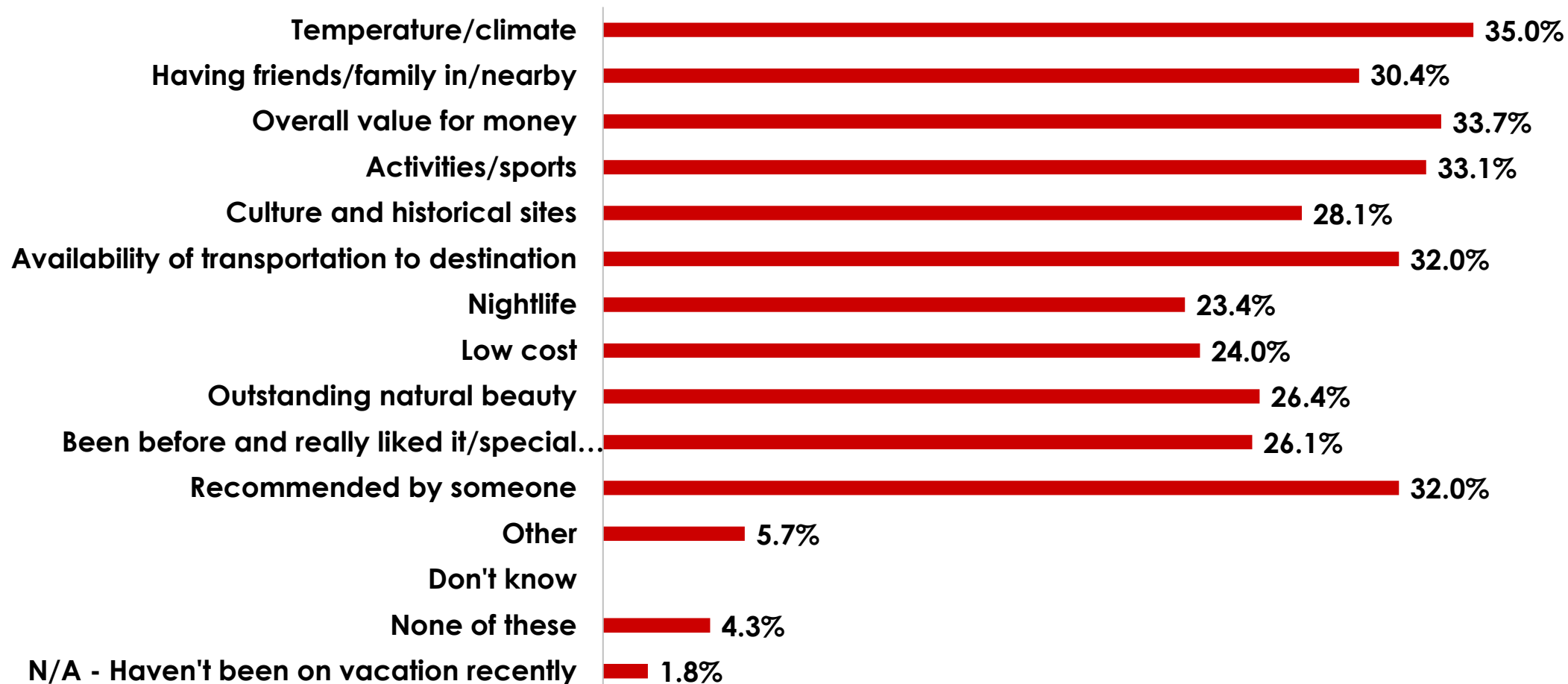


Reason for choosing most recent leisure destination

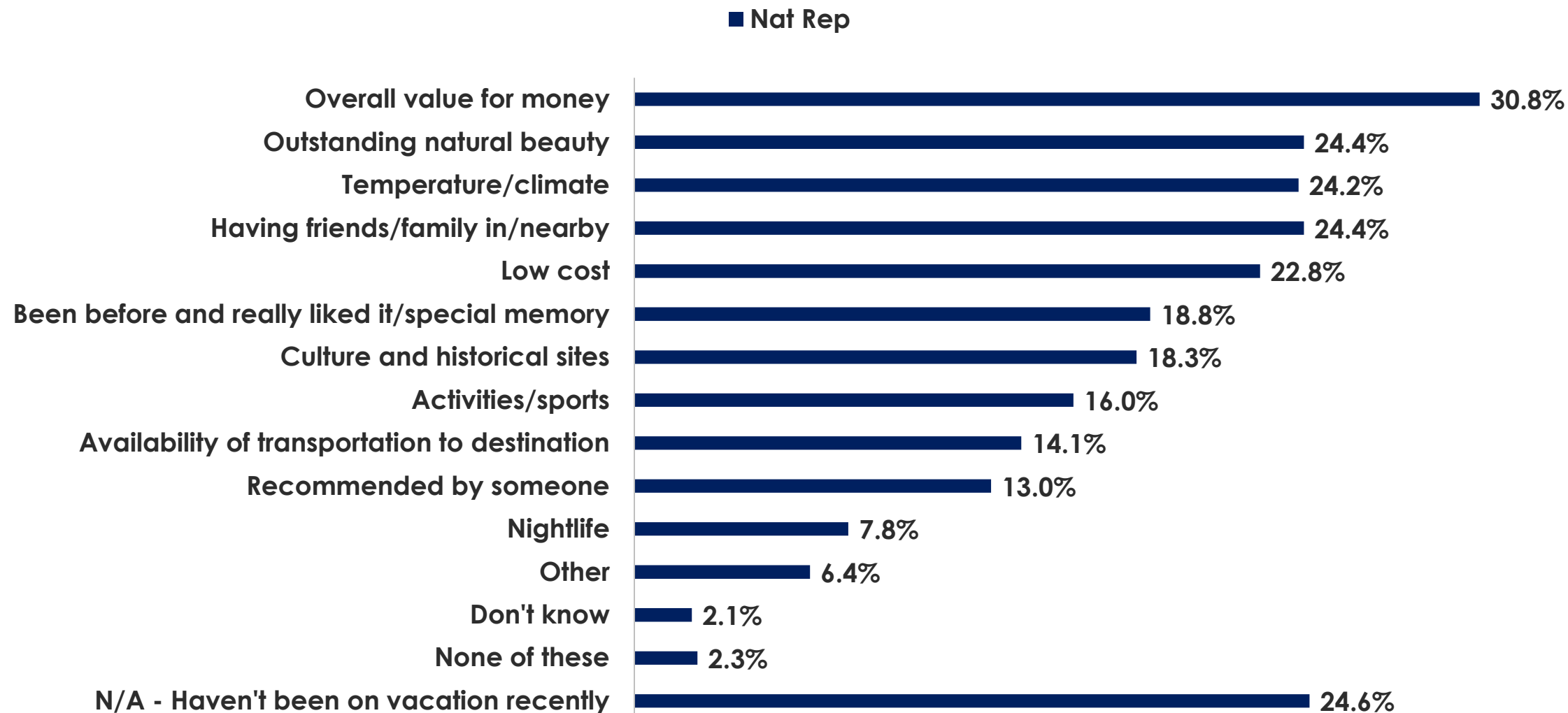


Reason for choosing most recent leisure destination

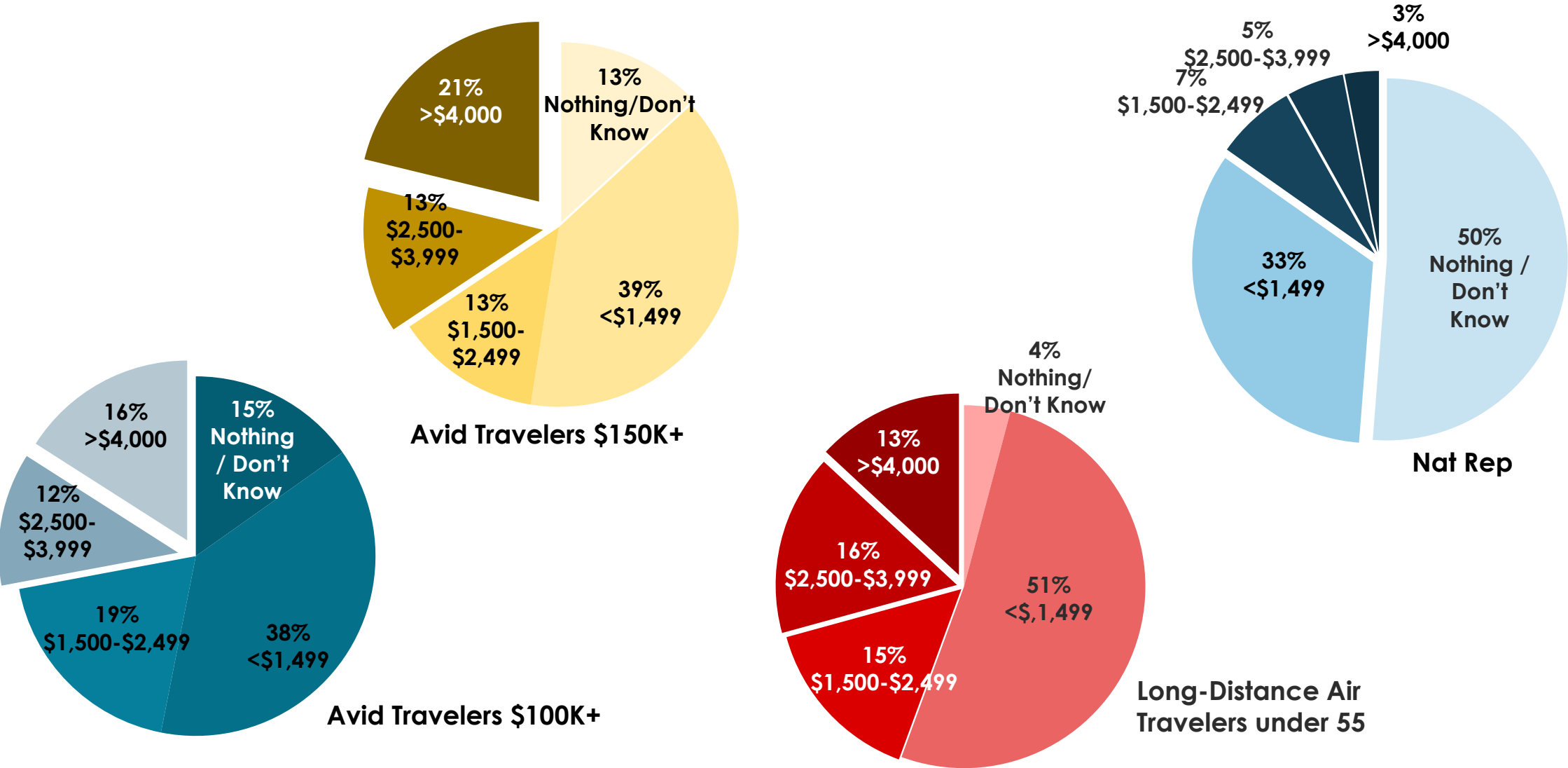
■ Long-Distance Air Traveler under 55



Reason for choosing most recent leisure destination

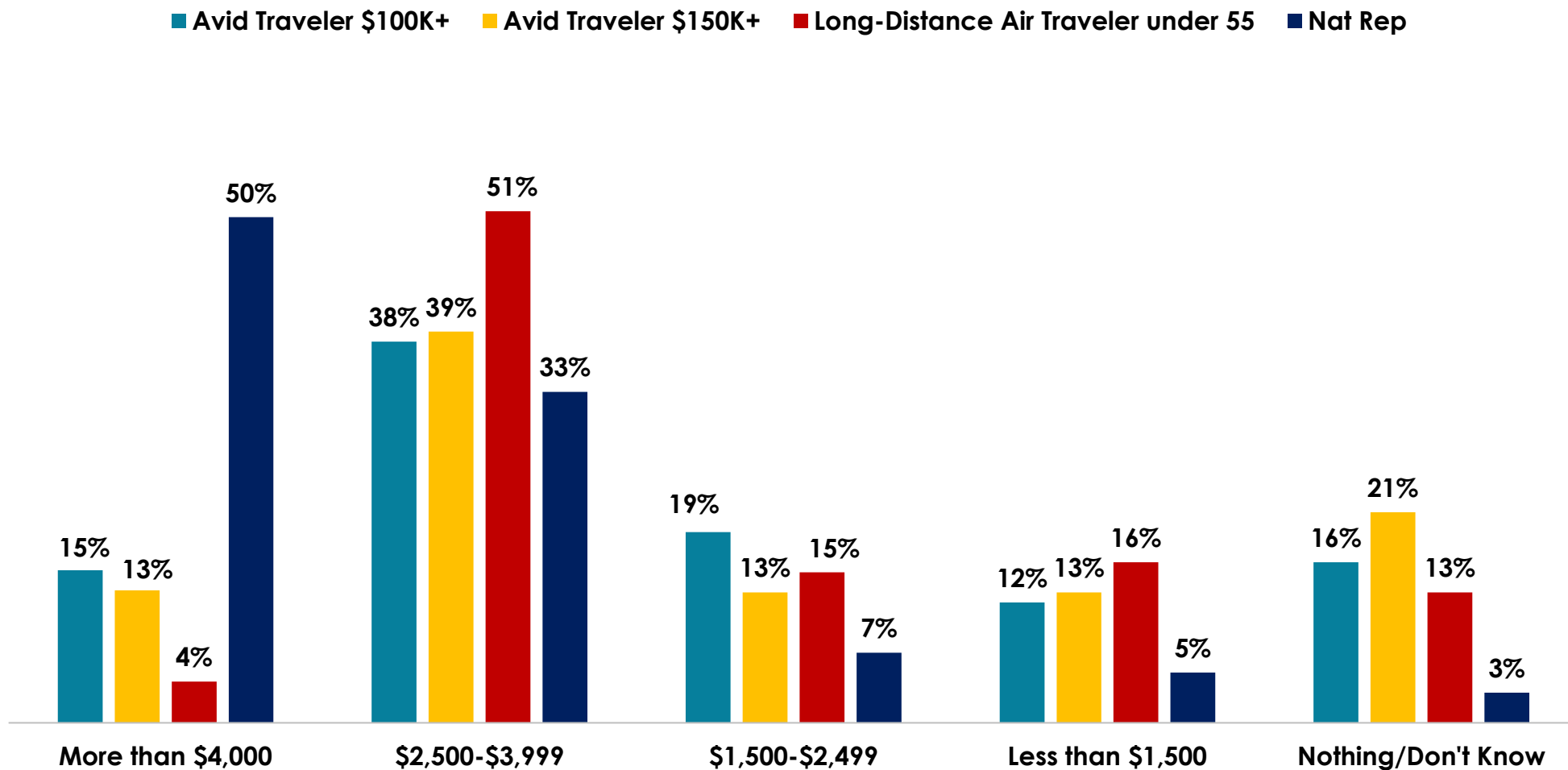


Most recent leisure trip - total spend

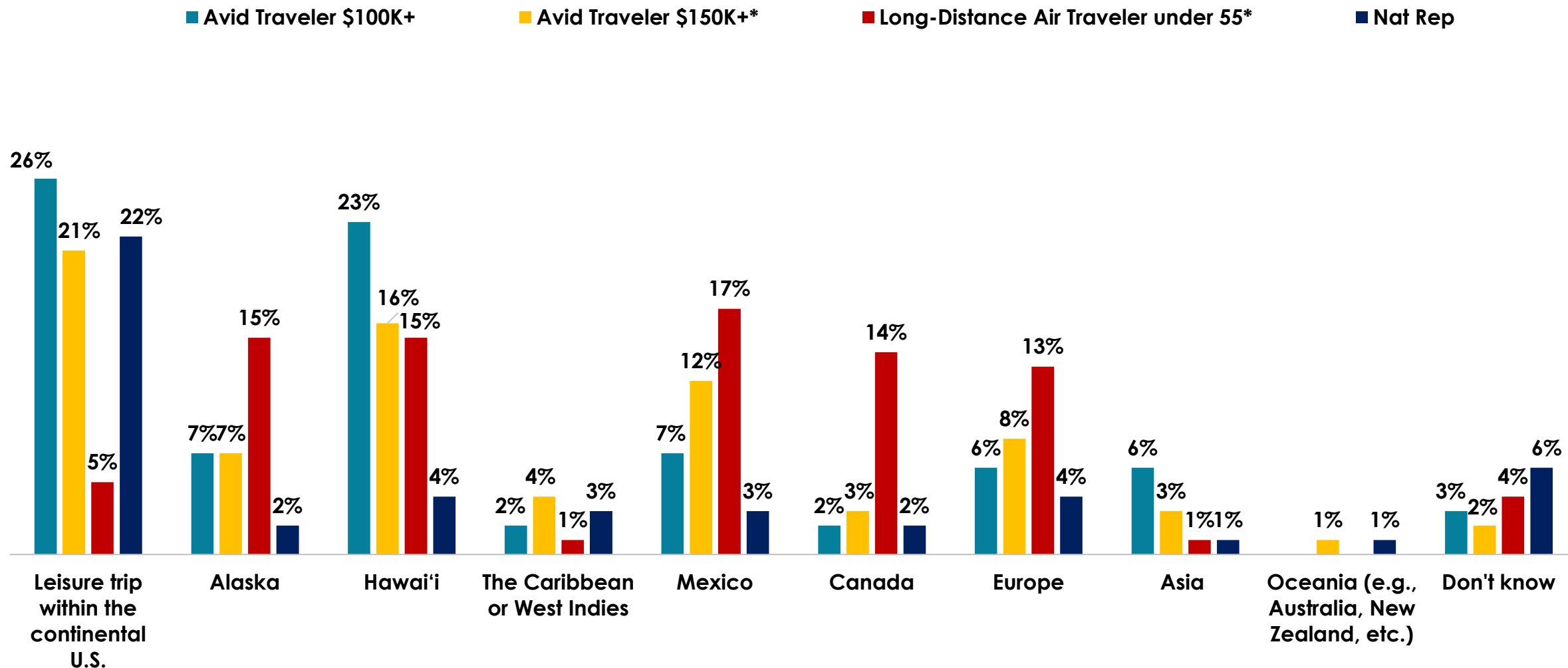


Based on Hawai'i Tourism Authority data, the average U.S. per person per trip spend for 2019 was \$1,693.32.

Most recent leisure trip - total spend



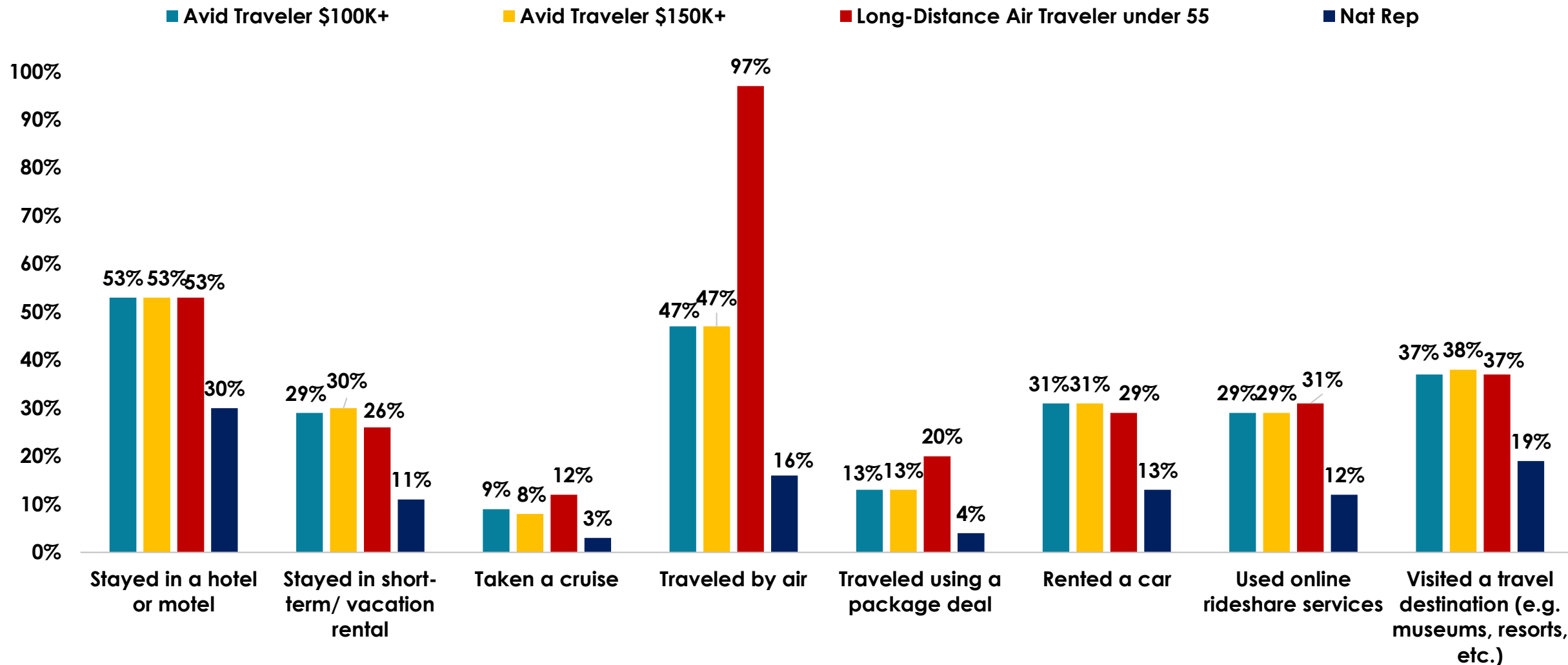
Leisure trip - next destination



*YouGov sample size <100

Source: HVCB analysis of YouGov data provided by HTA as of December 5, 2021

Leisure trip - activities in last 12 months



Travel Mindset

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



Travel Activities

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



Booking & Spending Attitudes

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



Booking & Spending Attitudes

