

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)

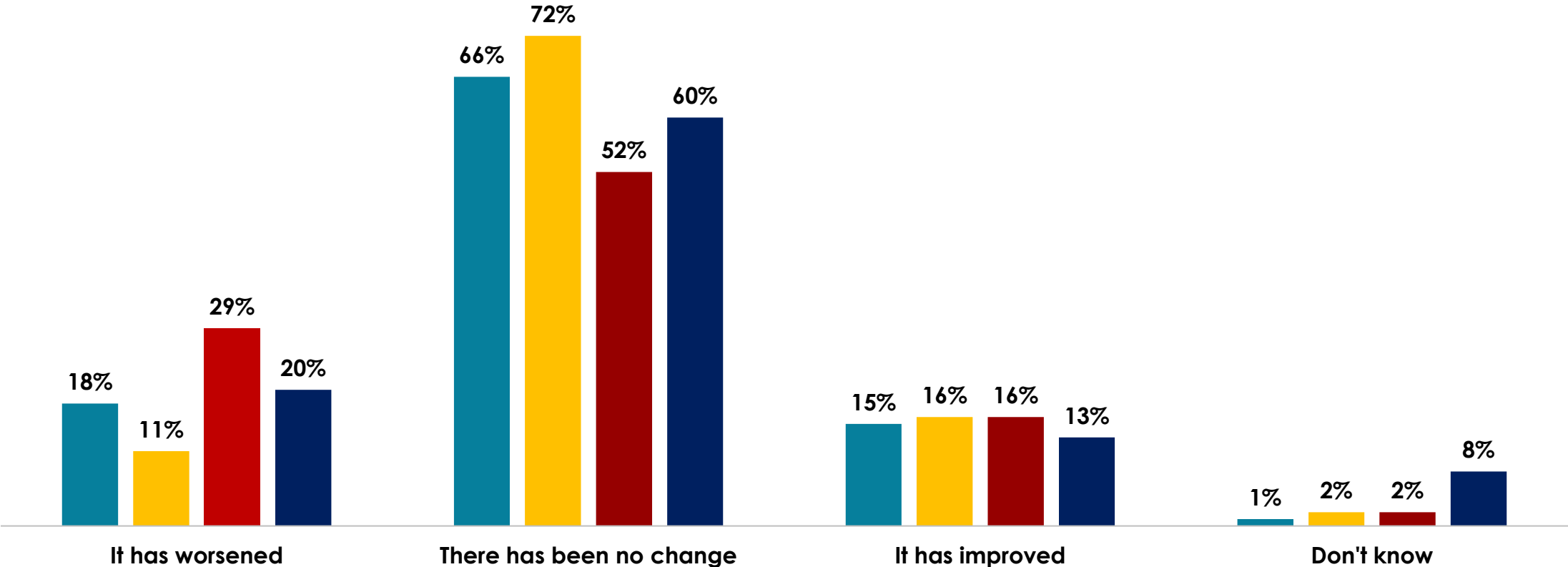
- Representative of U.S. adults in terms of age, gender, social class and education



Travelers' Pandemic Outlook

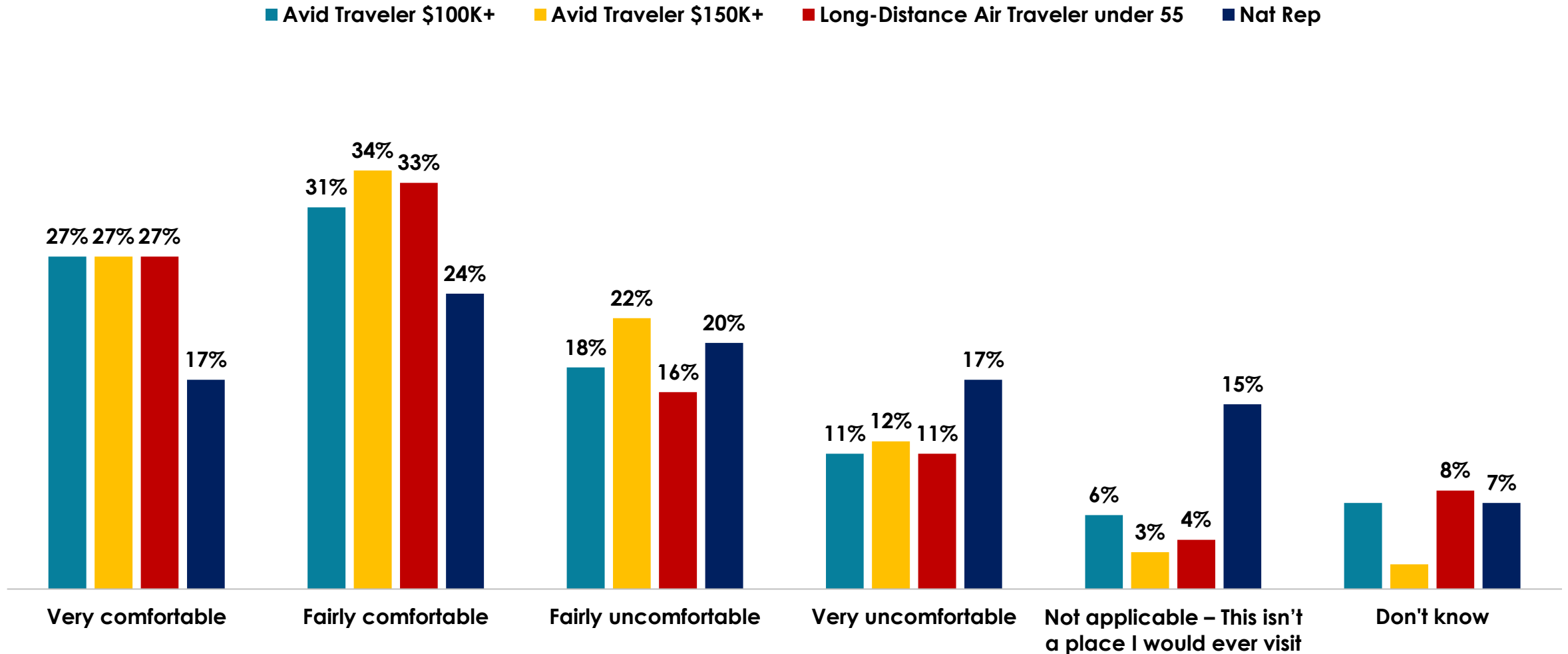
How has your household economic situation changed in the past month?

■ 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 December 5, 2021

Level of comfort visiting an airport right now

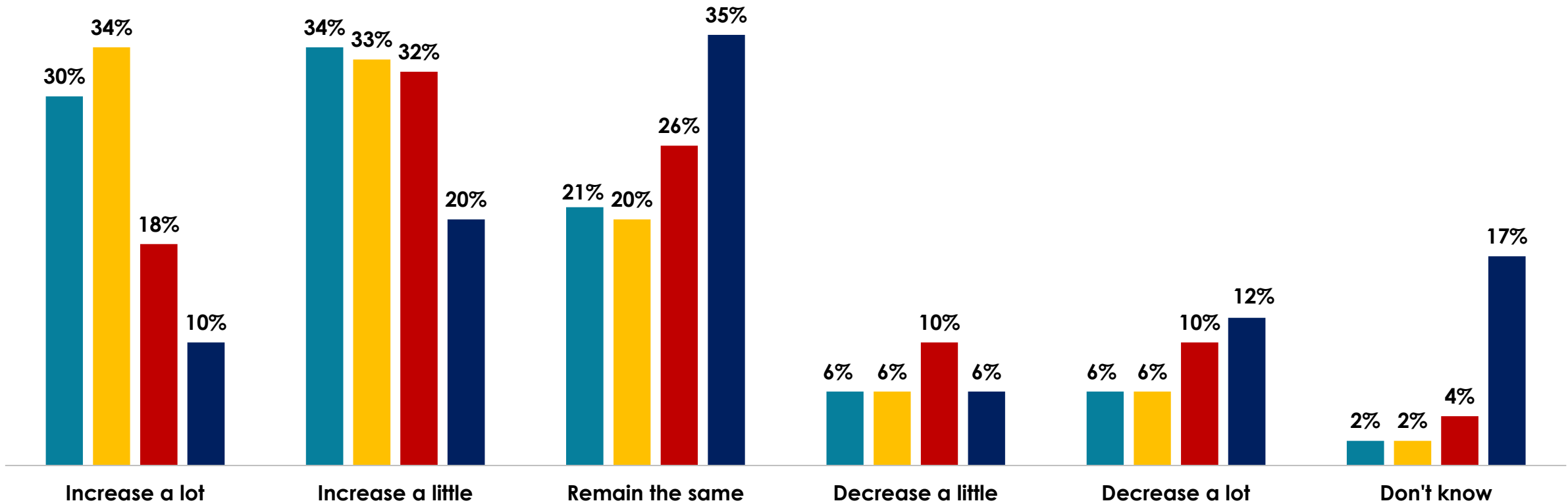




Future Travel Plans

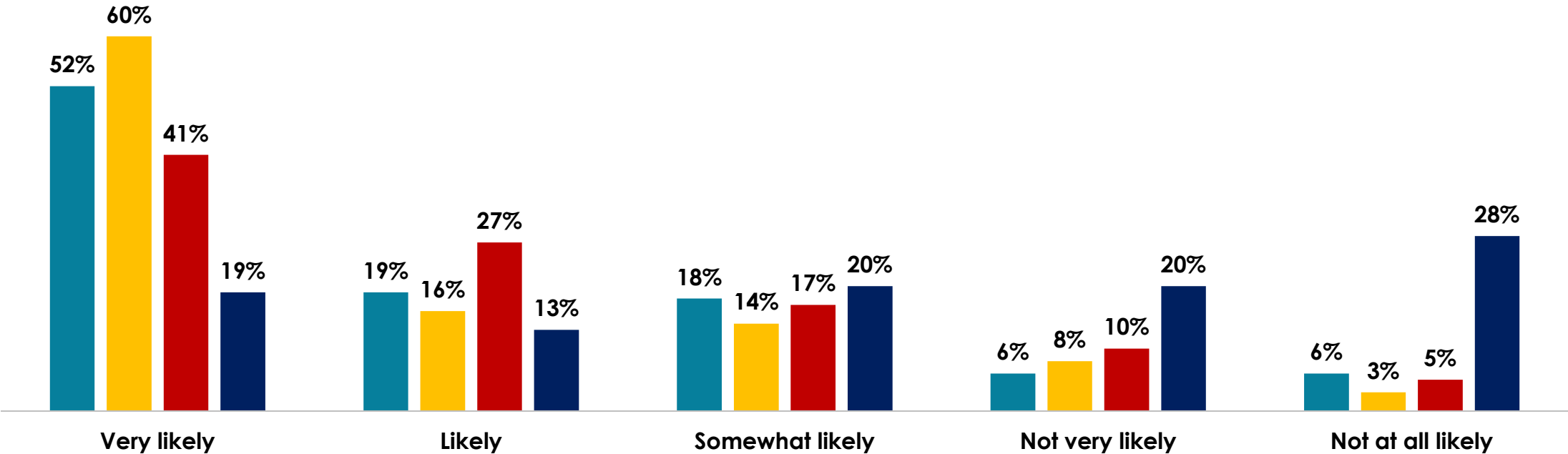
Future Travel – Expected change to air travel in the next 12 months

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



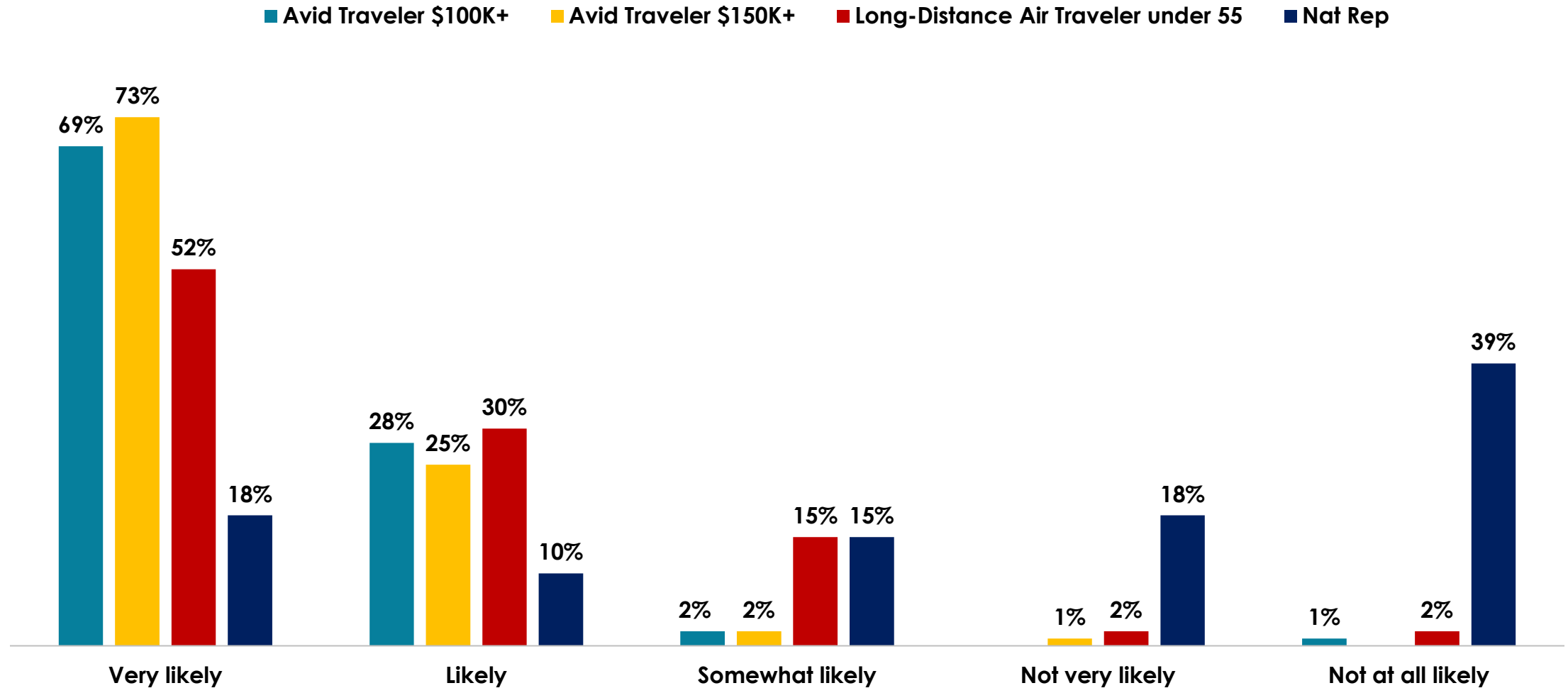
Future Travel – Likelihood of purchasing travel or leisure services in the next 12 months

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



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



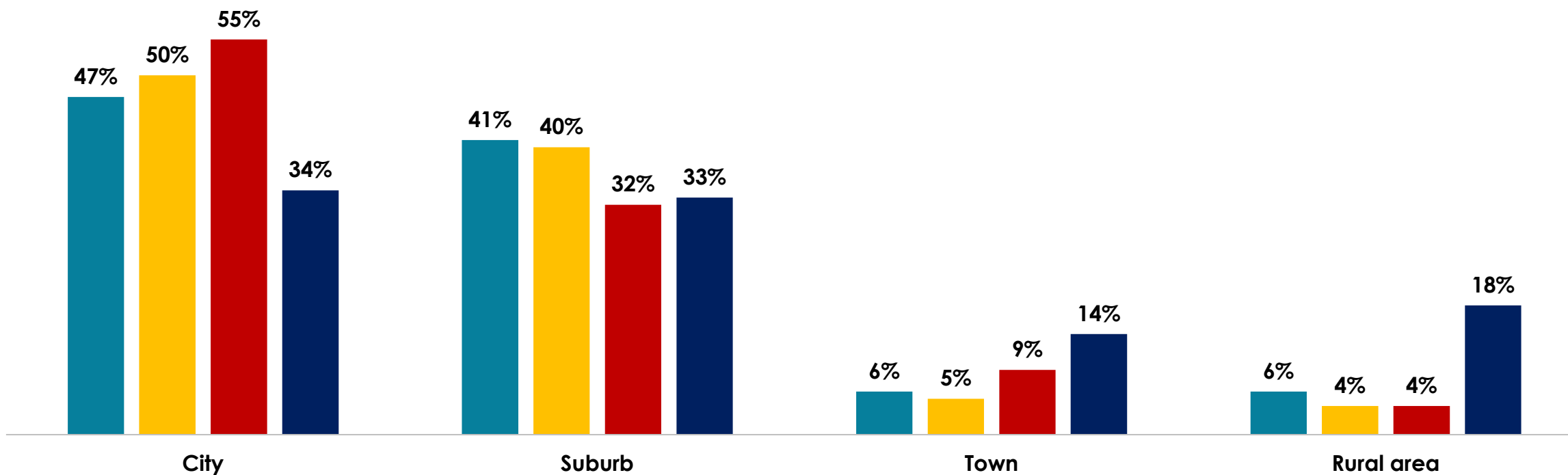


Traveler Profiles

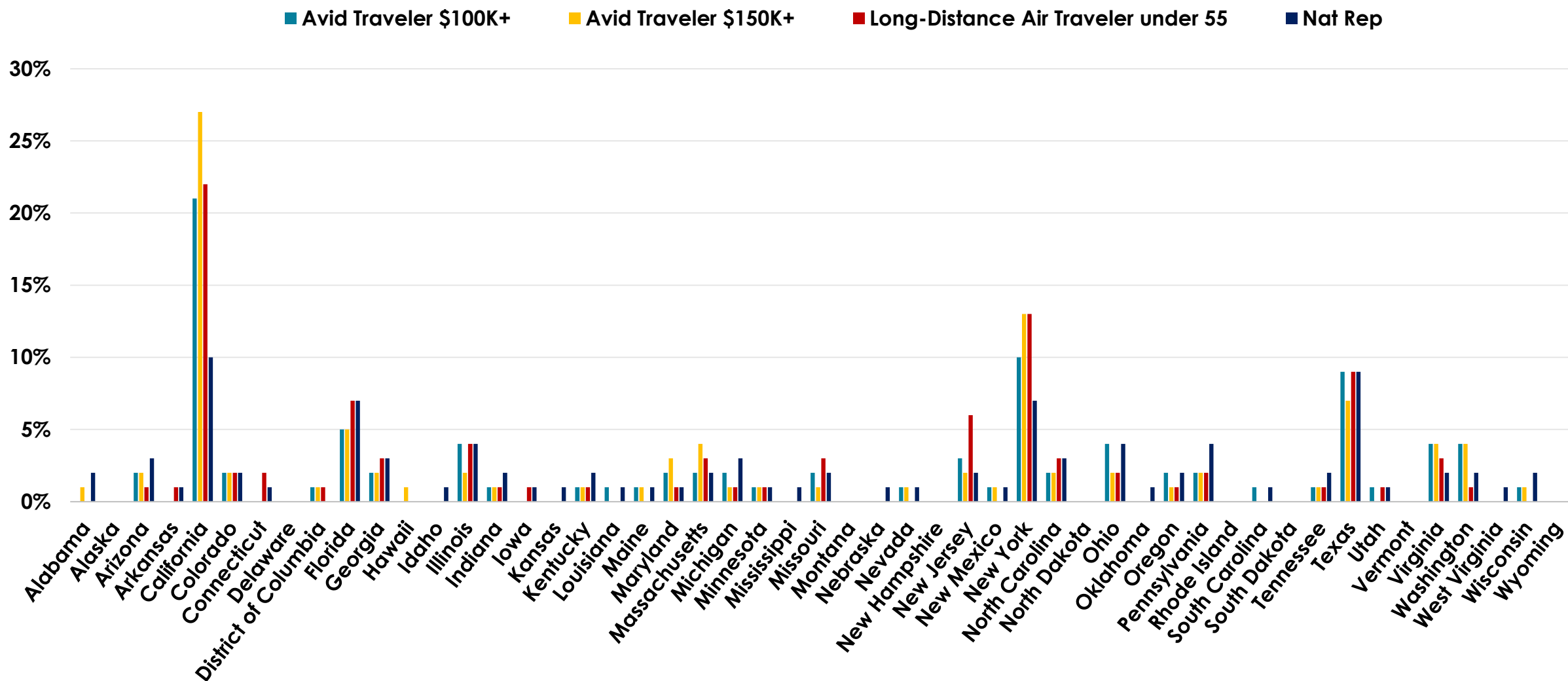
Avid Travelers vs. Long-Distance Air Travelers vs. Nat. Rep.

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

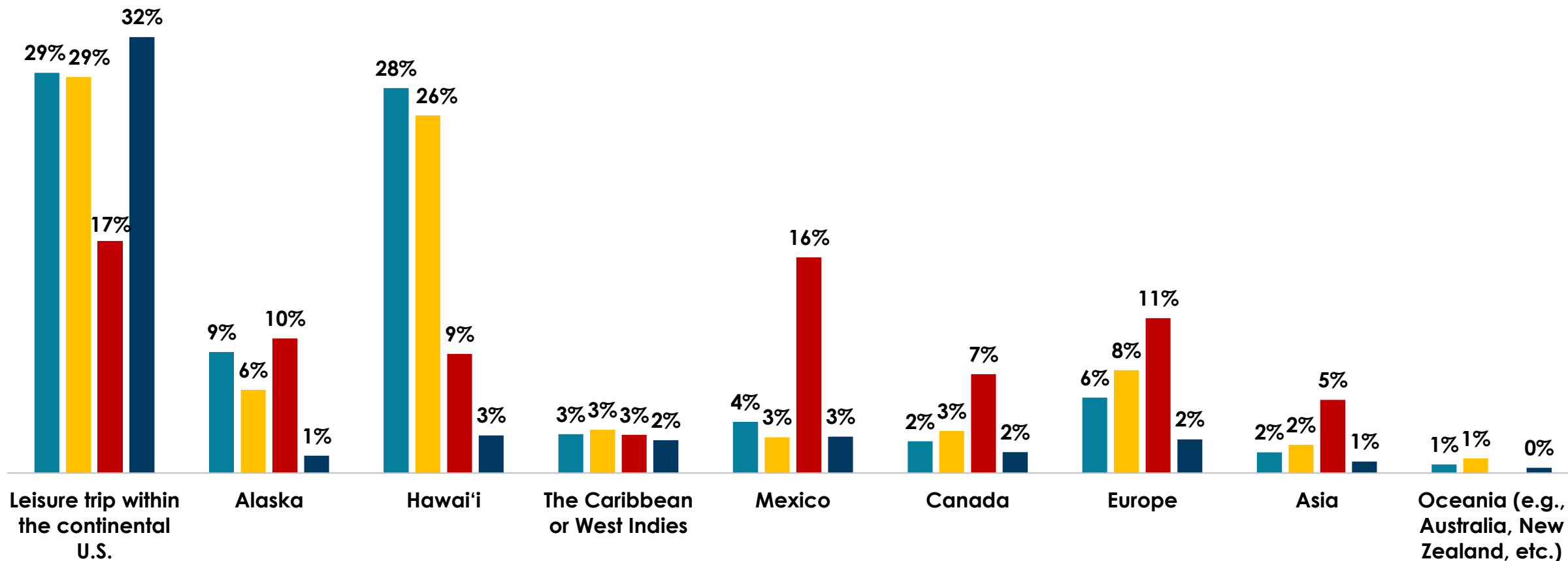
California	22.1%
New York	12.7%
Texas	8.7%
Florida	6.6%
New Jersey	5.8%
Illinois	4.3%
Virginia	3.3%
North Carolina	2.7%
Massachusetts	2.7%
Georgia	2.7%

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

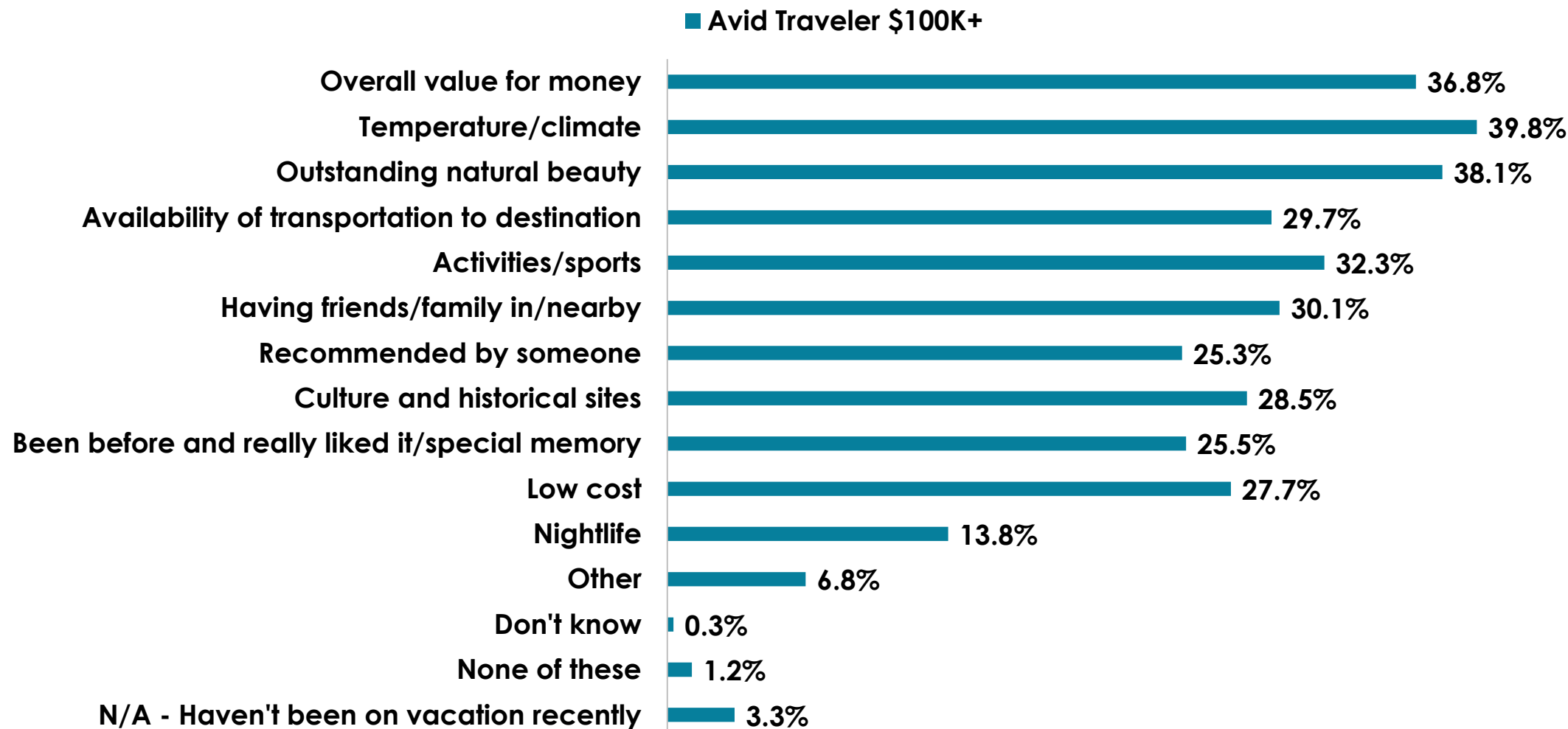
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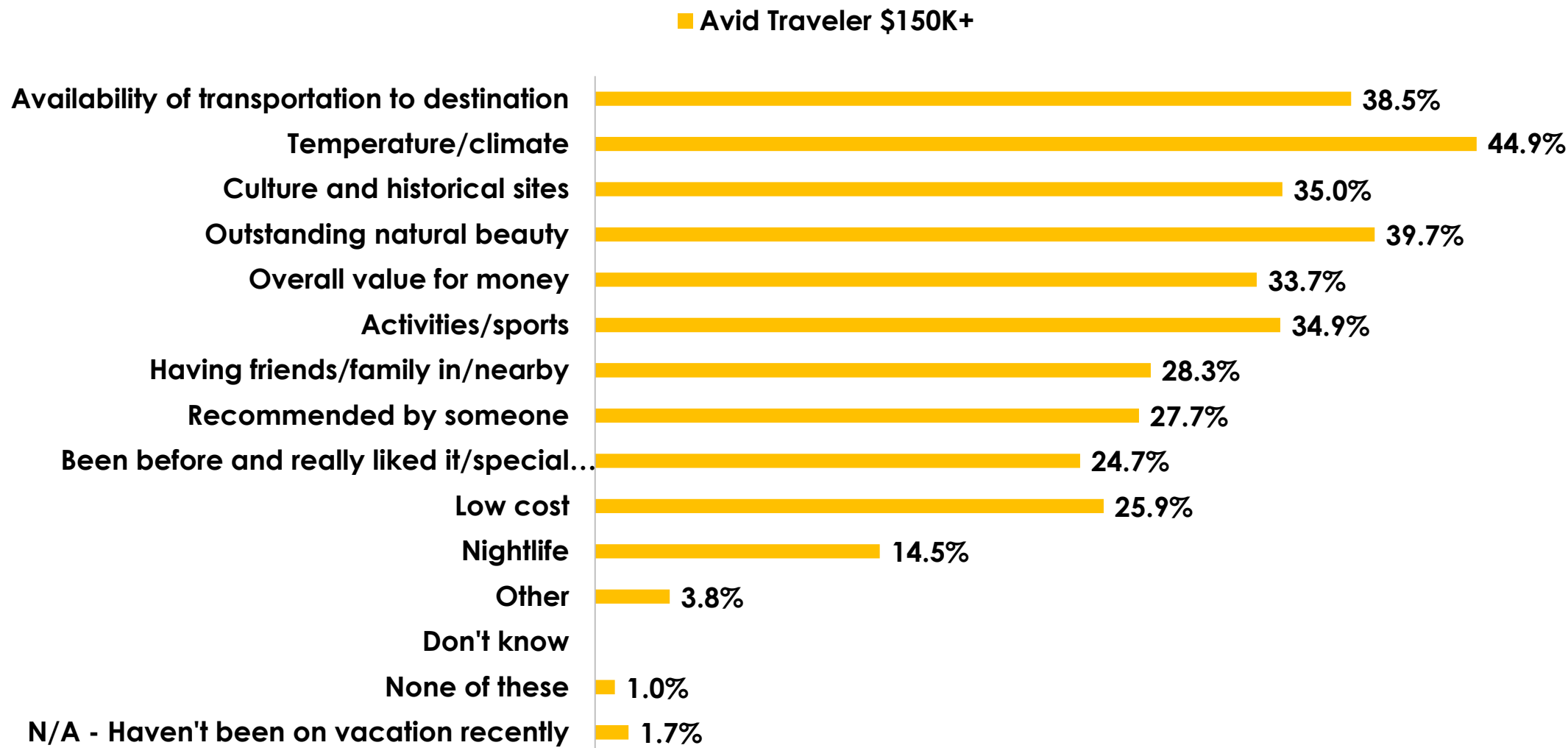
Reason for choosing most recent leisure destination

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	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

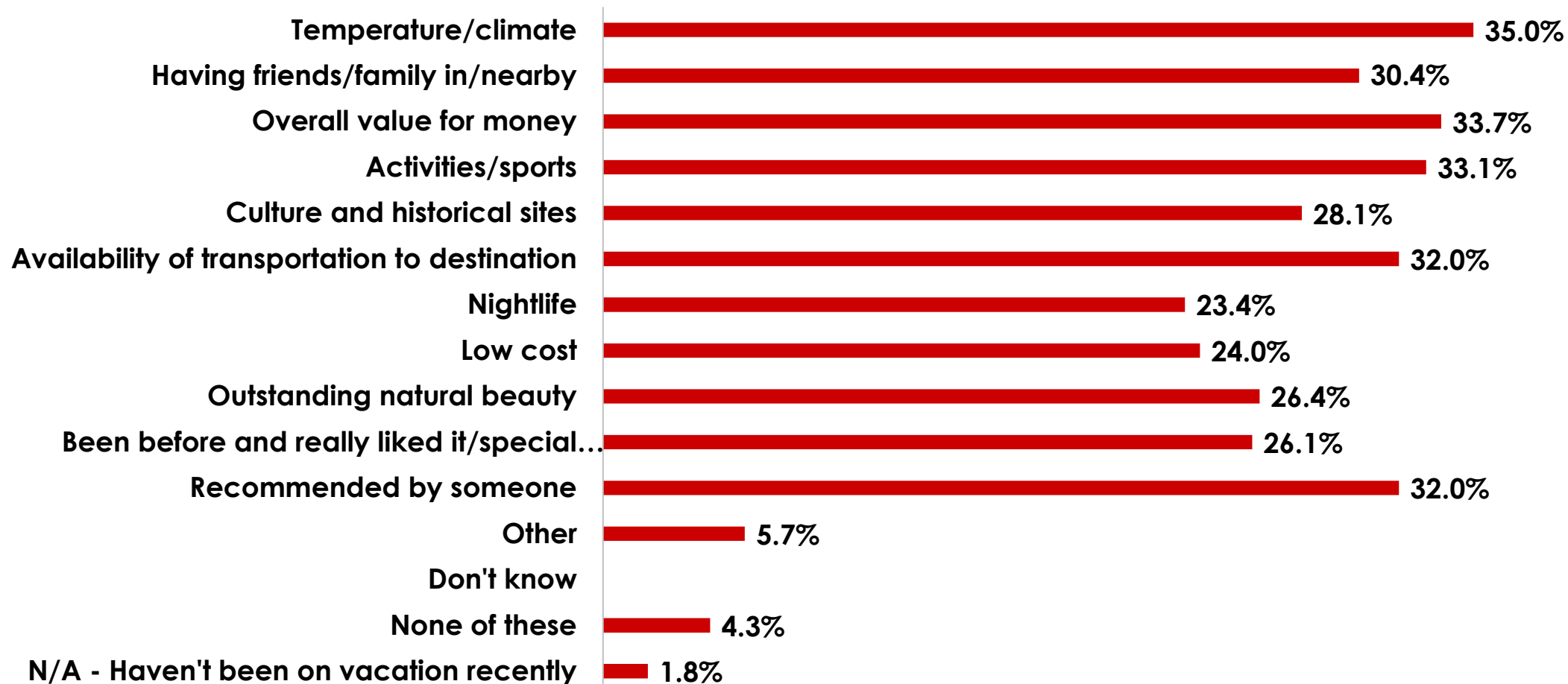


Reason for choosing most recent leisure destination

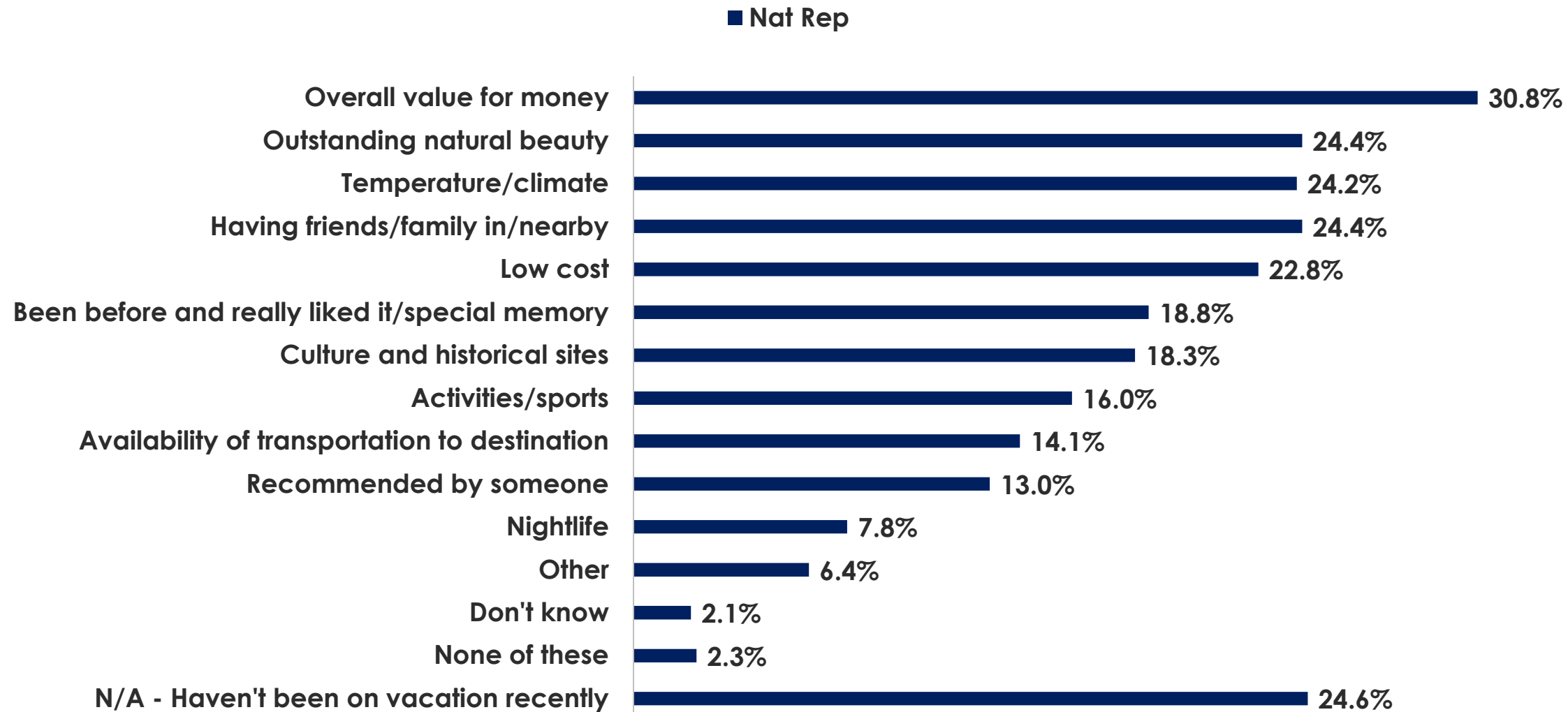


Reason for choosing most recent leisure destination

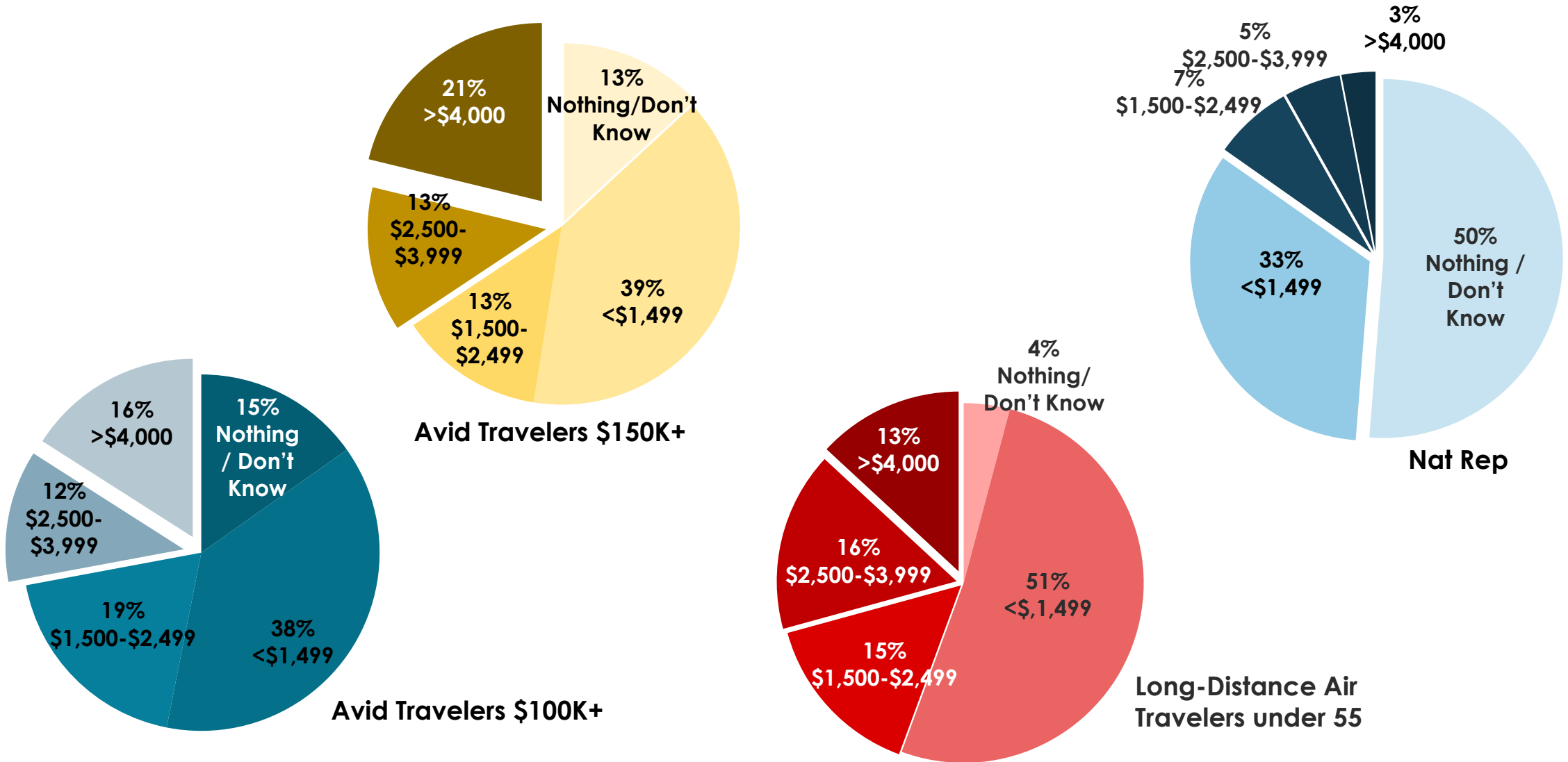
■ Long-Distance Air Traveler under 55



Reason for choosing most recent leisure destination



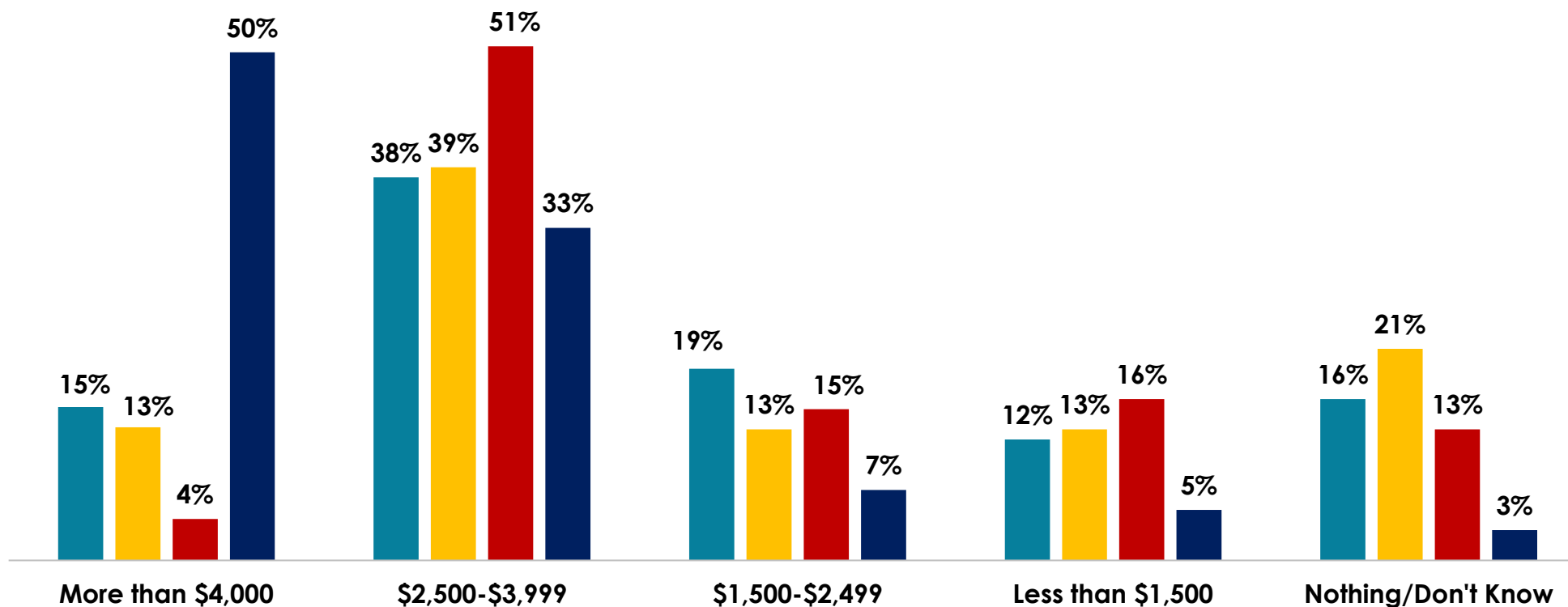
Most recent leisure trip - total spend



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

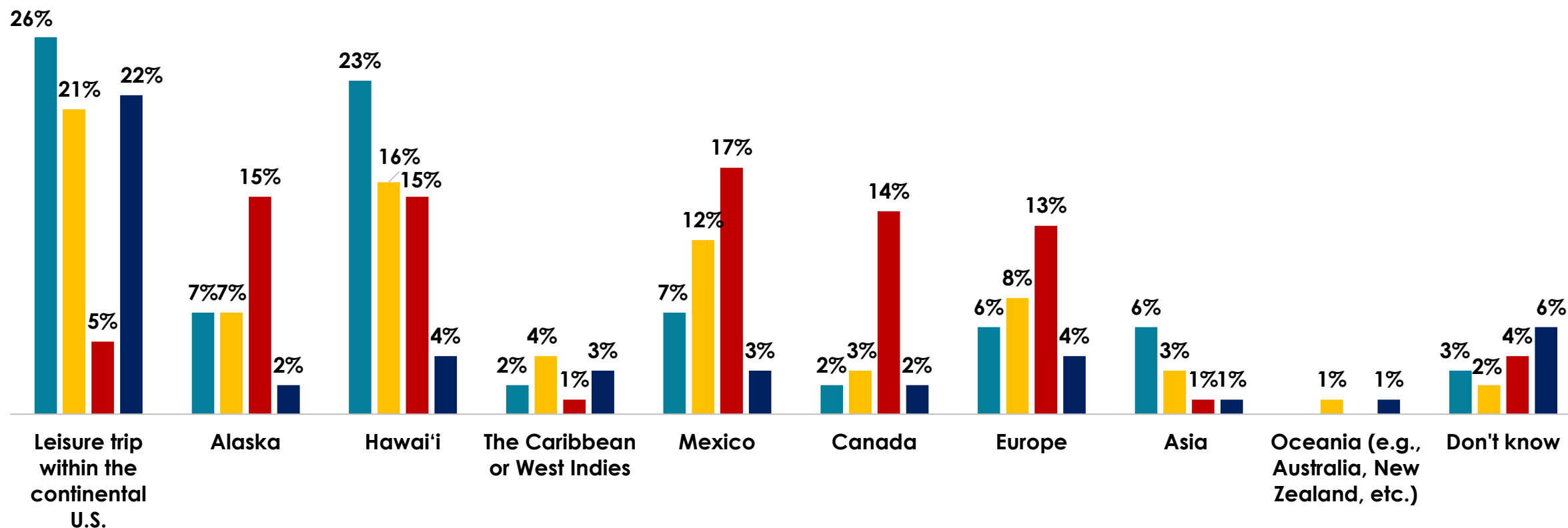
Most recent leisure trip - total spend

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Leisure trip - next destination

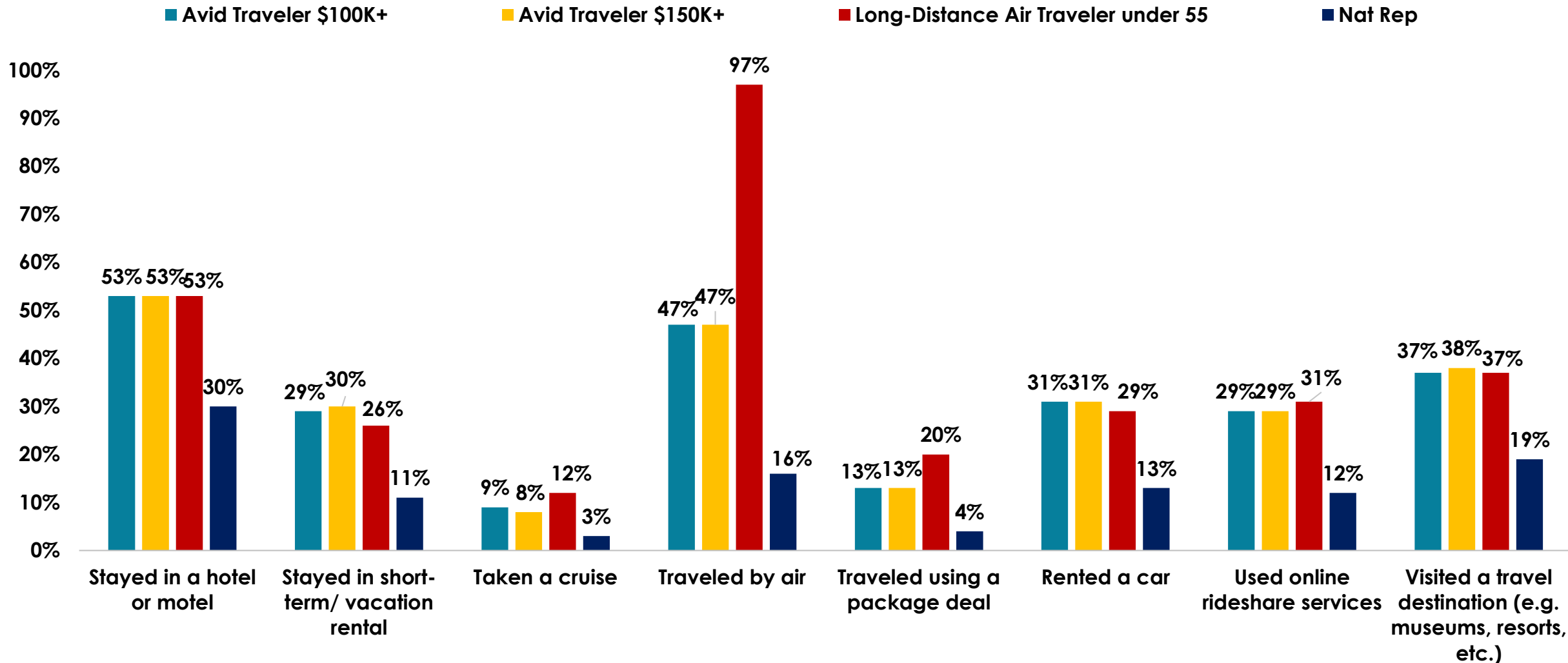
■ Avid Traveler \$100K+
 ■ Avid Traveler \$150K+*
 ■ Long-Distance Air Traveler under 55*
 ■ Nat Rep



*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+
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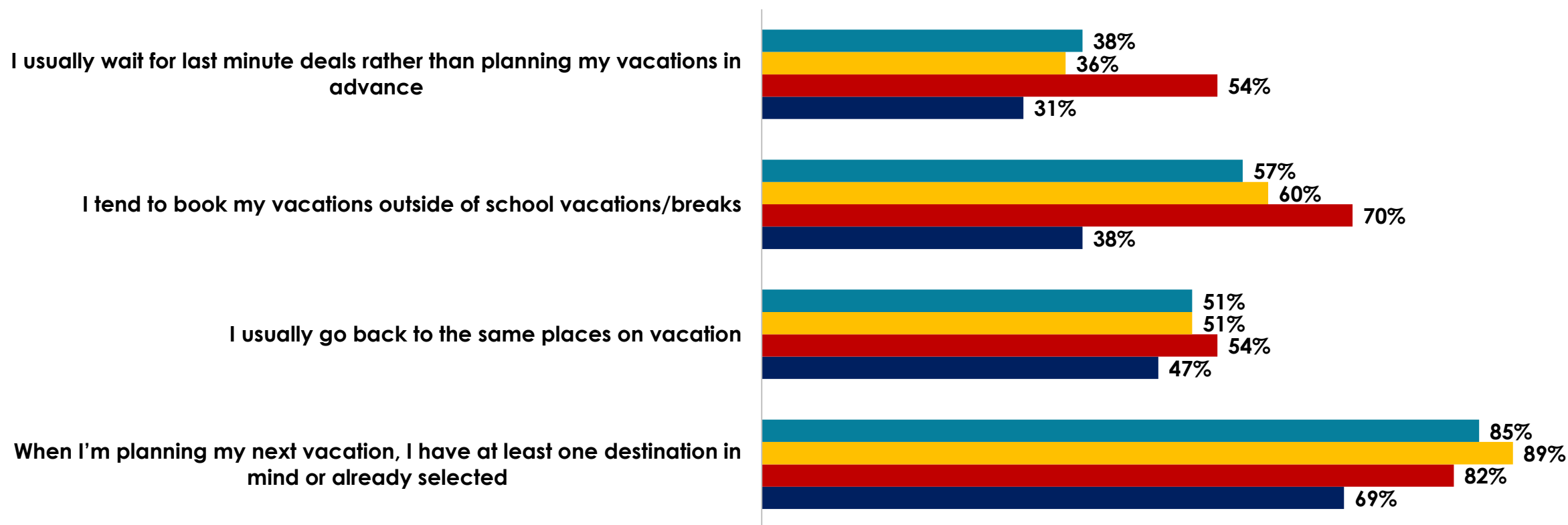
Travel Activities

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Booking & Spending Attitudes

■ Avid Traveler \$100K+
 ■ Avid Traveler \$150K+
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Booking & Spending Attitudes

