

COVID-19 Impact on U.S. Avid Travelers

An HVCB analysis of YouGov data provided by HTA as of February 6, 2022

Reported on February 17, 2022

YouGov®

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YouGov Syndicated Survey

- HTA subscribes to YouGov's Brand Index 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)

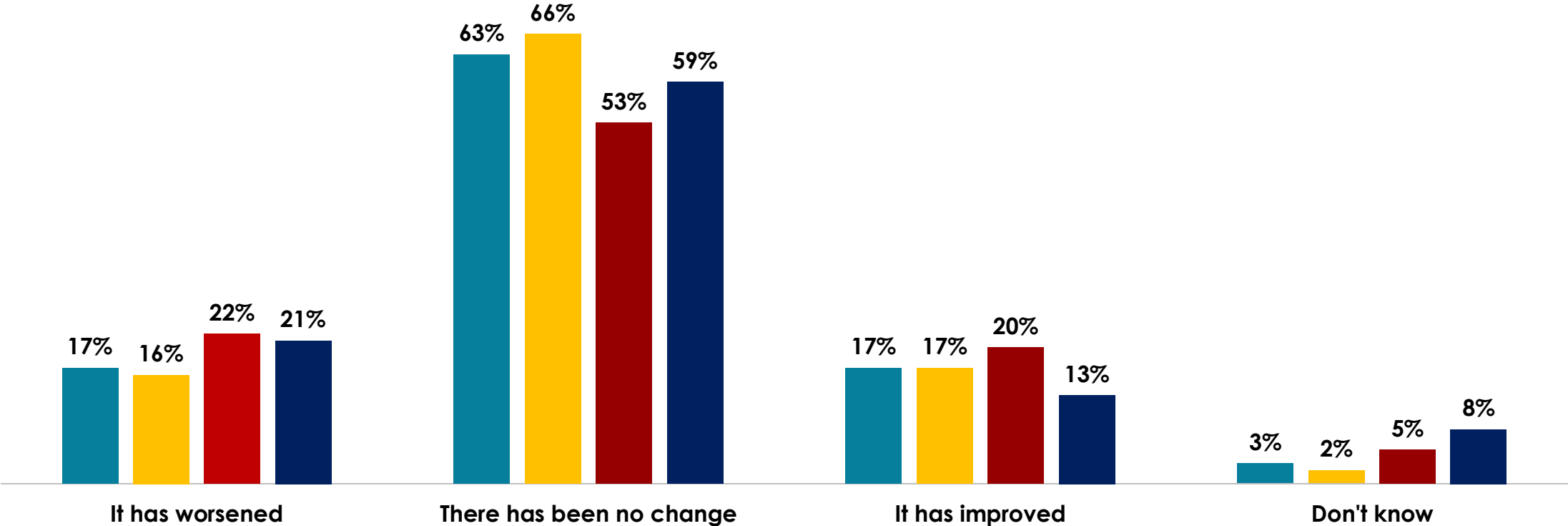
- Representative of U.S. adults in terms of age, gender, social class and education



Travelers' Pandemic Outlook

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

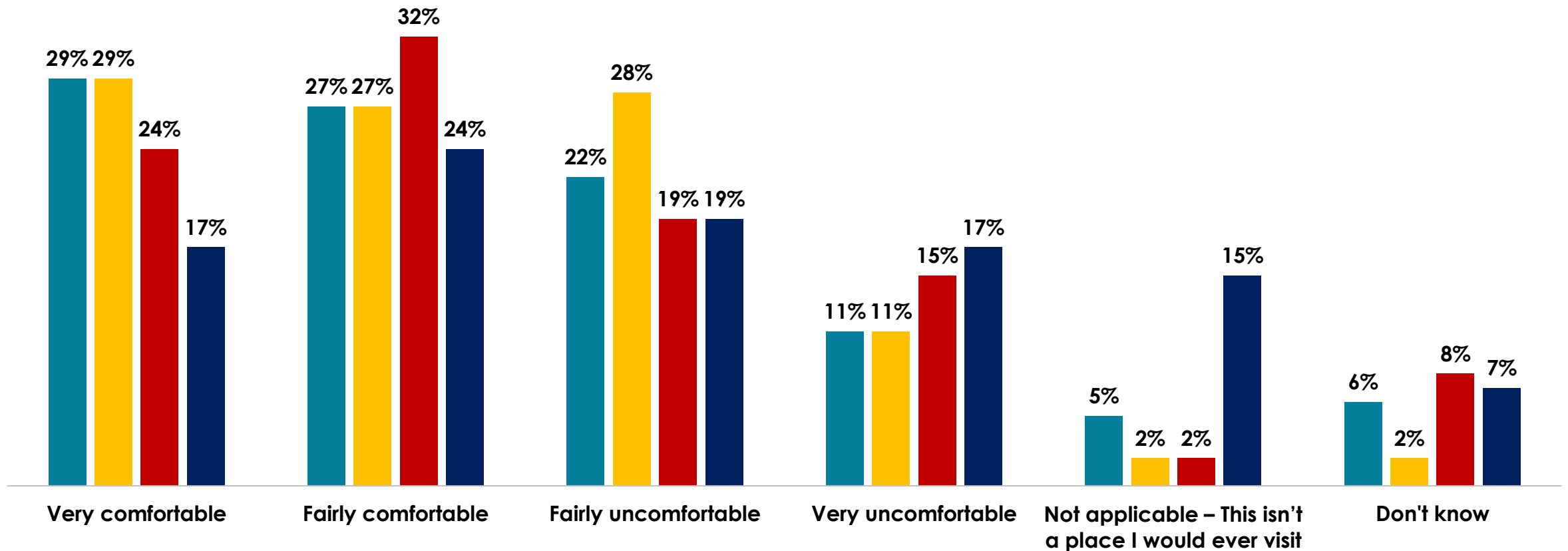
■ Avid Traveler \$100K+ ■ Avid Traveler \$150K+ ■ Long-Distance Air Traveler under 55 ■ Nat Rep



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Level of comfort visiting an airport right now

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

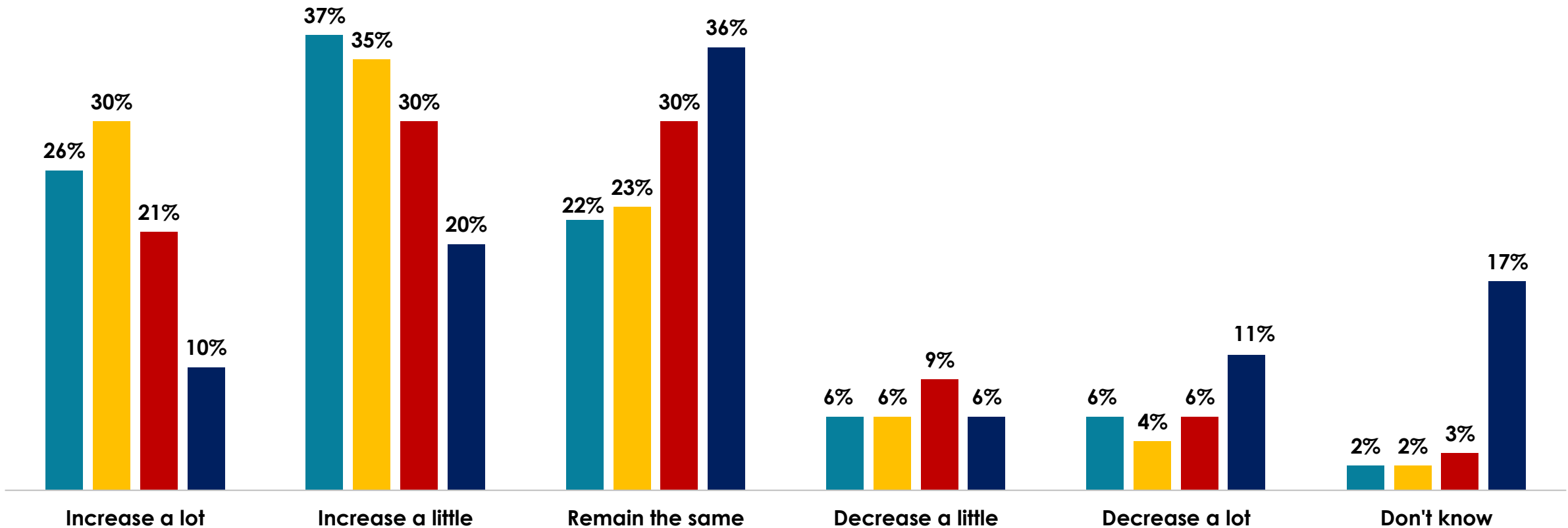




Future Travel Plans

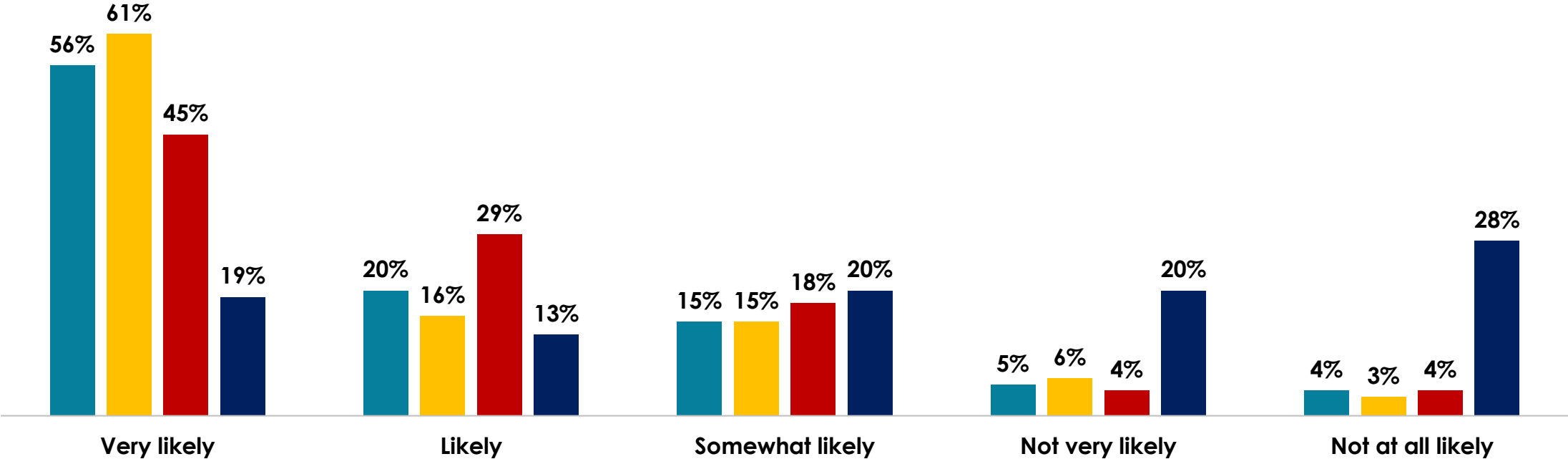
Future Travel – Expected change to air travel in the next 12 months

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



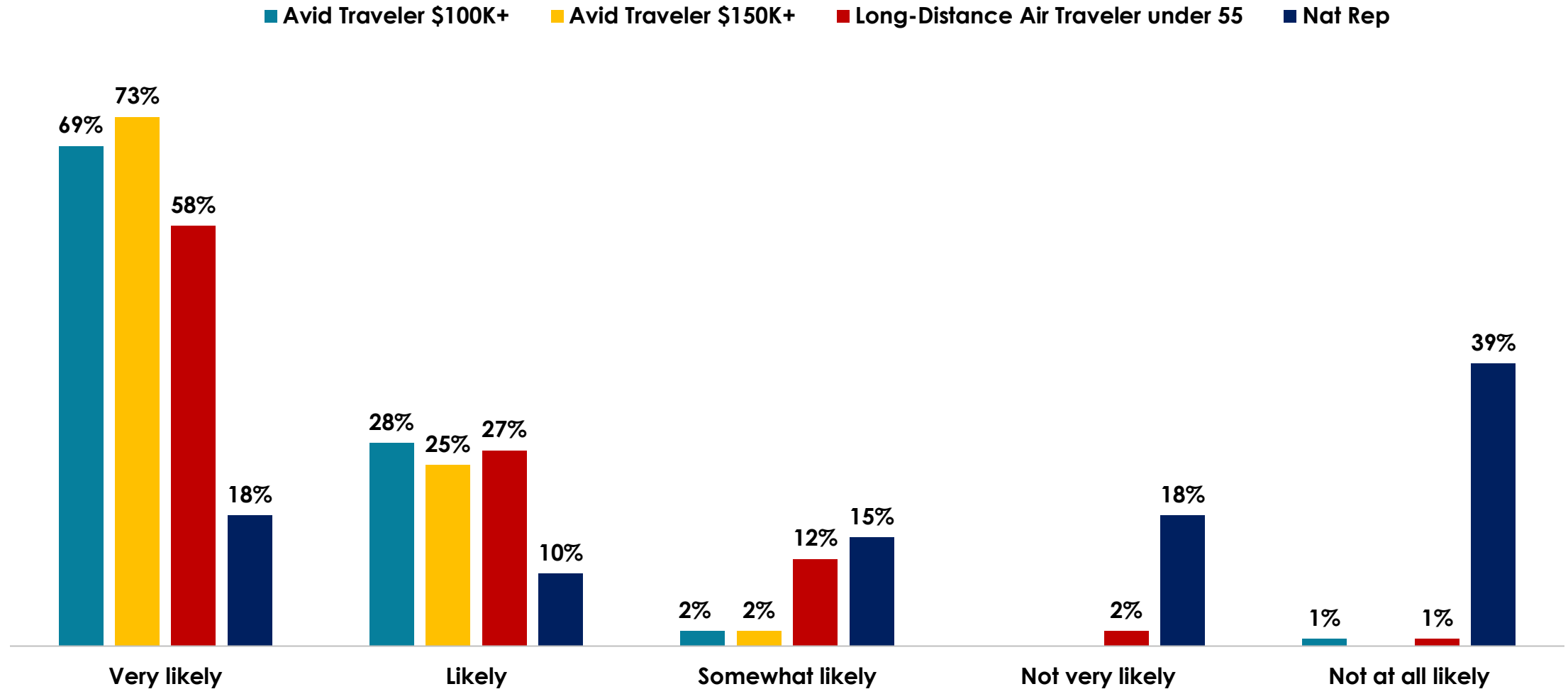
Future Travel – Likelihood of purchasing travel or leisure services in the next 12 months

■ 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



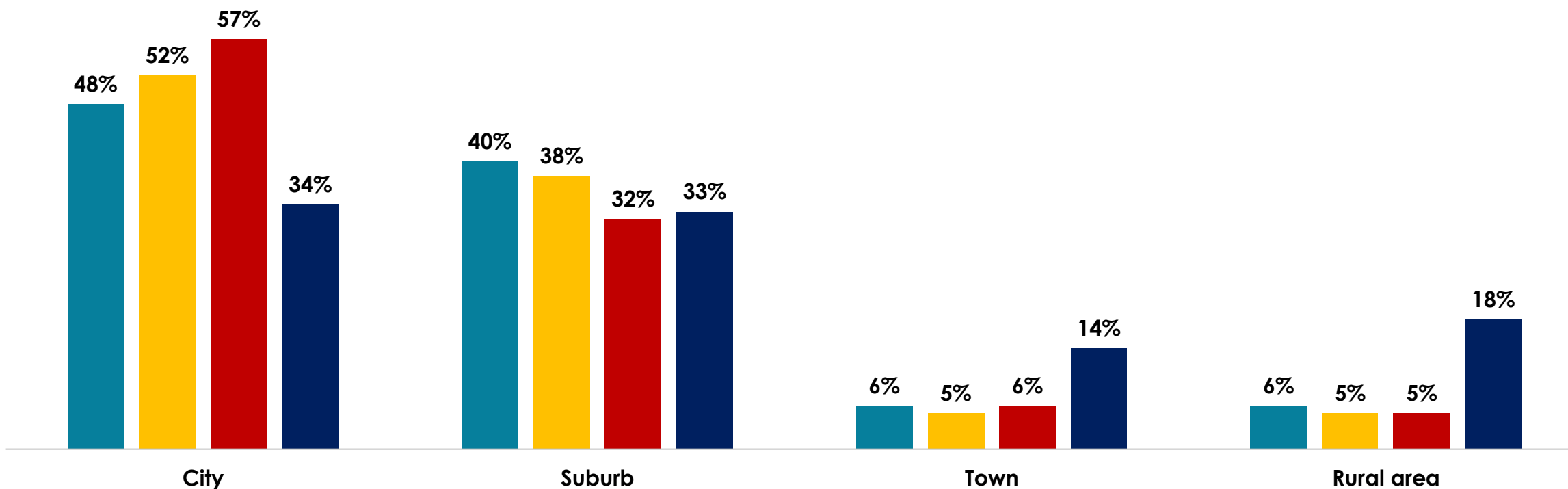


Traveler Profiles

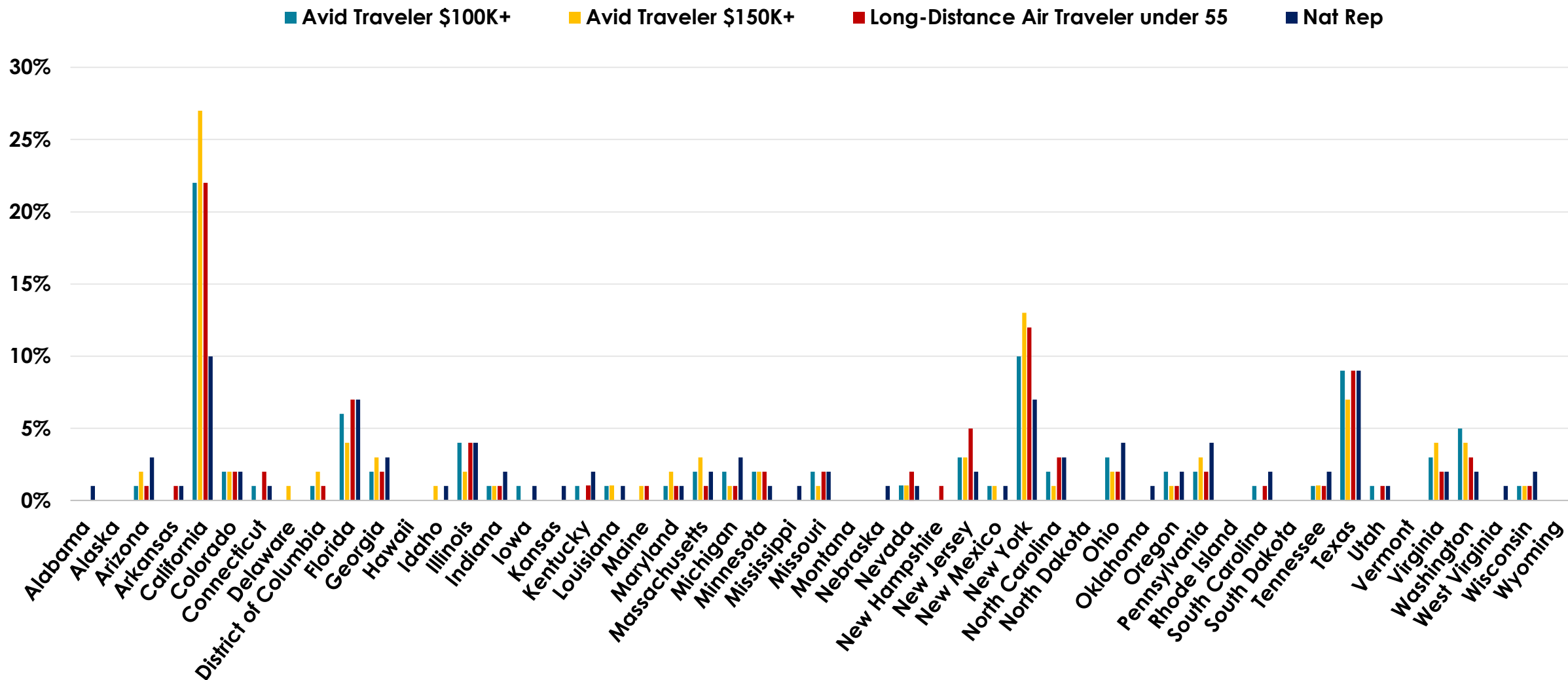
Avid Travelers vs. Long-Distance Air Travelers vs. Nat. Rep.

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	21.5%
New York	10.1%
Texas	8.6%
Florida	5.8%
Washington	4.5%
Illinois	4.0%
Virginia	3.3%
New Jersey	2.9%
Ohio	2.8%
Pennsylvania	2.5%

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

California	26.7%
New York	12.7%
Texas	7.3%
Florida	4.4%
Washington	4.3%
Virginia	3.8%
Massachusetts	3.1%
Georgia	2.8%
New Jersey	2.8%
Pennsylvania	2.6%

Long-Distance Air Traveler under 55

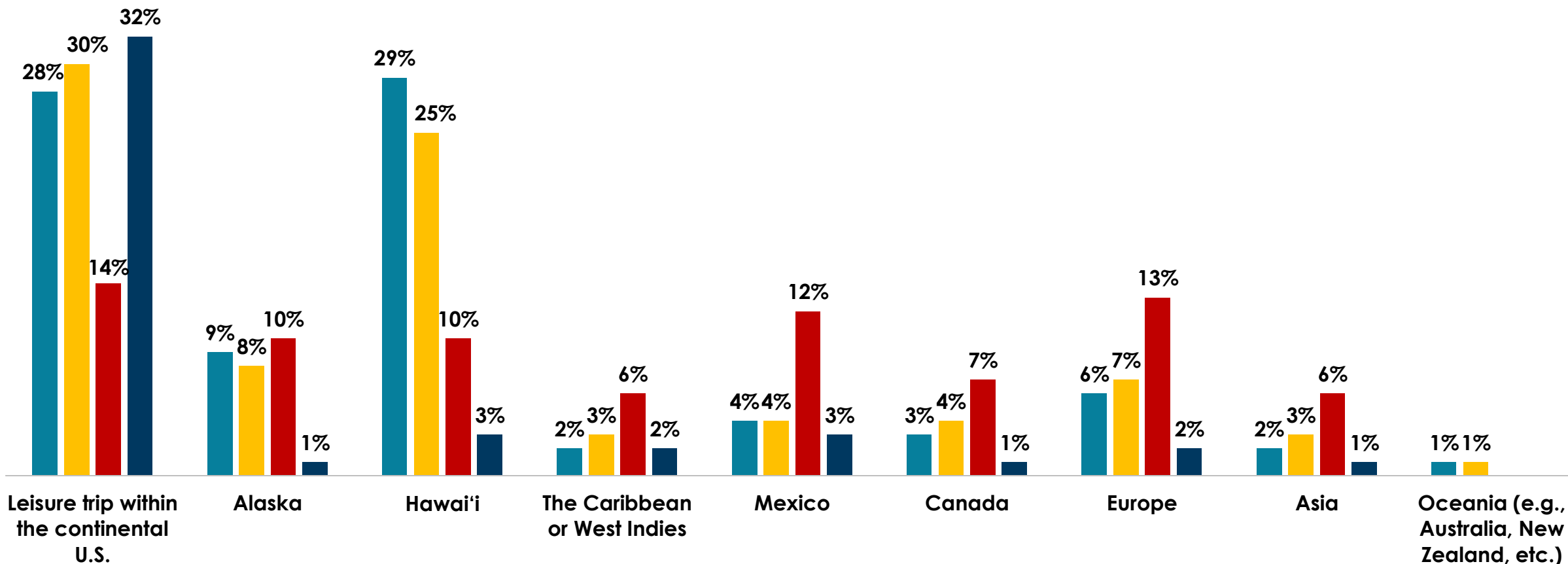
California	22.5%
New York	11.8%
Texas	8.6%
Florida	6.6%
New Jersey	4.6%
Illinois	4.5%
Washington	3.1%
North Carolina	2.8%
Virginia	2.5%
Georgia	2.3%

Nat Rep

California	10.1%
Texas	9.0%
Florida	6.9%
New York	6.7%
Pennsylvania	4.3%
Ohio	3.8%
Illinois	3.5%
Georgia	3.2%
North Carolina	2.8%
Michigan	2.8%

Leisure trip – most recent destination

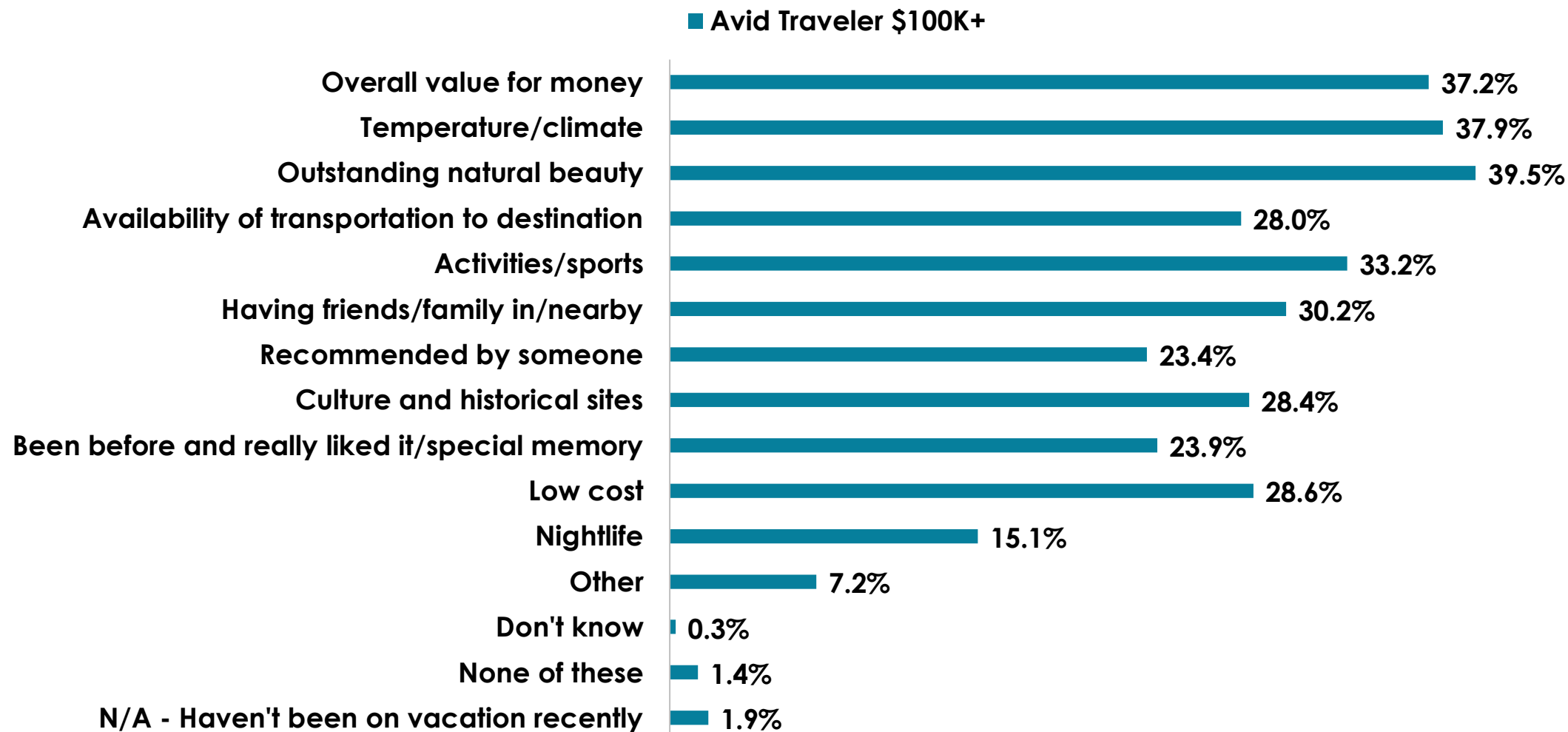
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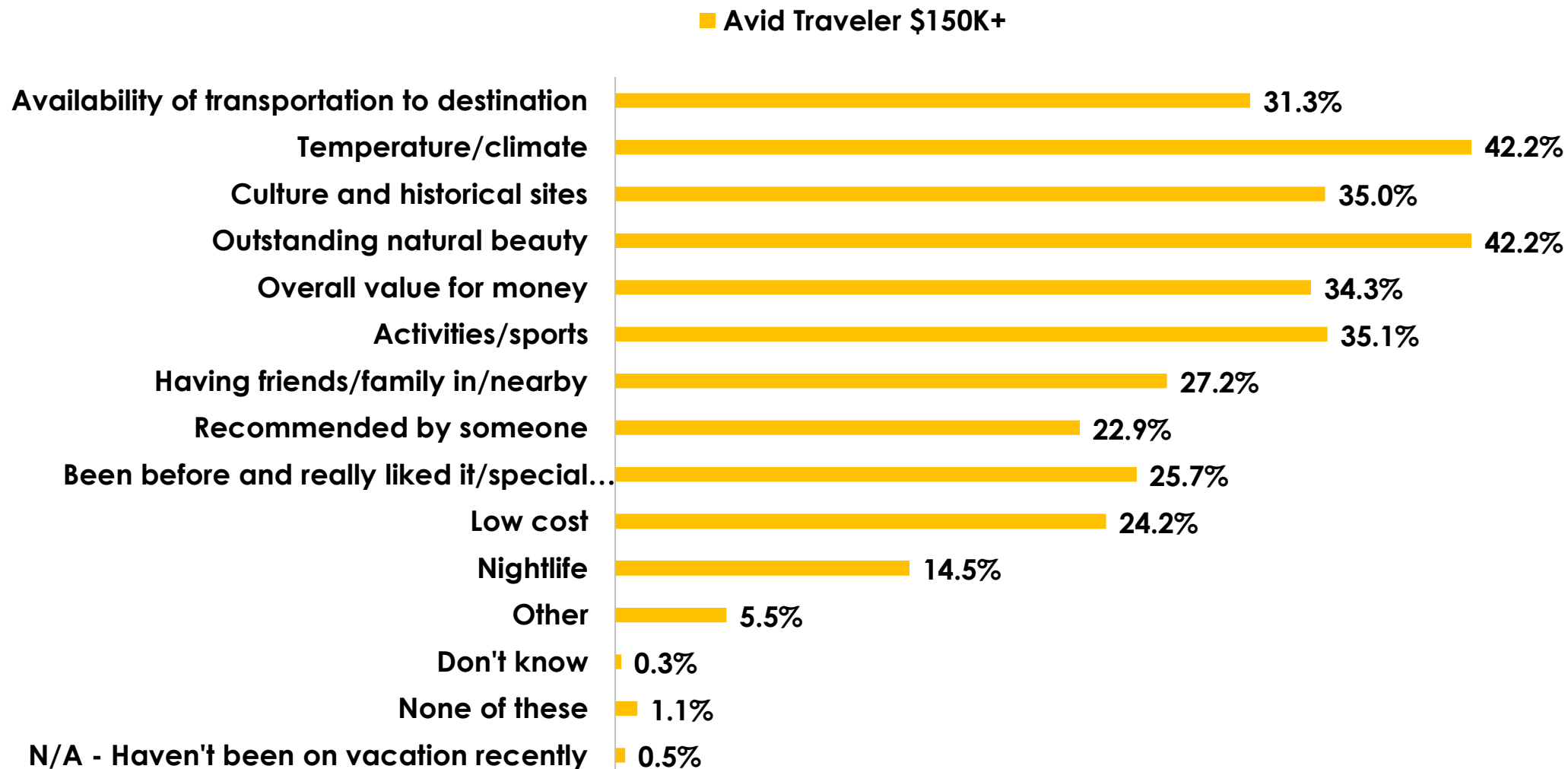
Reason for choosing most recent leisure destination

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	37.9%	42.2%	35.6%	23.9%
Availability of transportation to destination	28.0%	31.3%	35.3%	14.2%
Culture and historical sites	28.4%	35.0%	28.3%	18.4%
Overall value for money	37.2%	34.3%	31.8%	30.8%
Activities/sports	33.2%	35.1%	27.9%	16.2%
Outstanding natural beauty	39.5%	42.2%	32.5%	24.0%
Nightlife	15.1%	14.5%	23.5%	8.3%
Having friends/family in/nearby	30.2%	27.2%	32.0%	24.4%
Low cost	28.6%	24.2%	34.0%	23.3%
Been before and really liked it/special memory	23.9%	25.7%	27.1%	18.7%
Recommended by someone	23.4%	22.9%	27.5%	13.8%
Other	7.2%	5.5%	5.4%	6.5%
Don't know	0.3%	0.3%	0.0%	2.1%
None of these	1.4%	1.1%	0.8%	2.3%
N/A - Haven't been on vacation recently	1.9%	0.5%	2.9%	24.0%

Reason for choosing most recent leisure destination

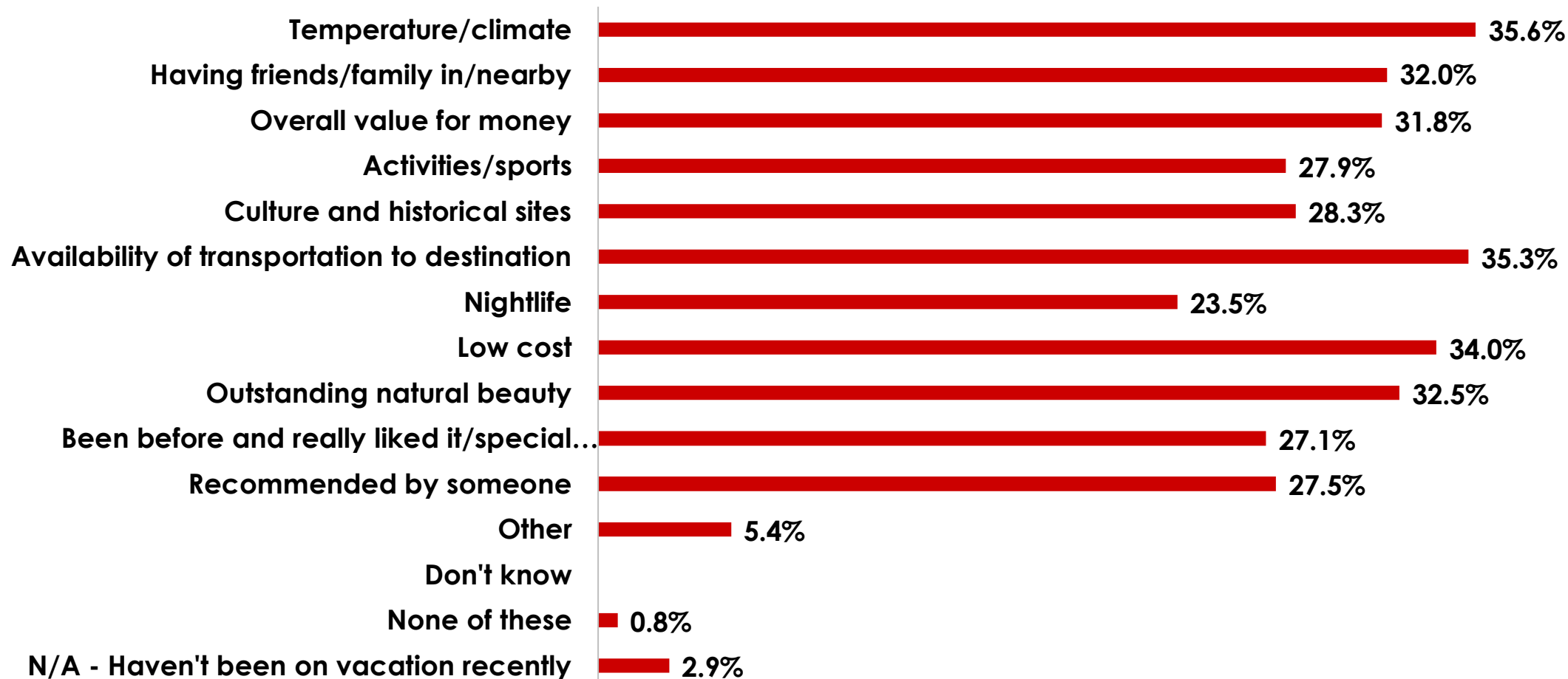


Reason for choosing most recent leisure destination

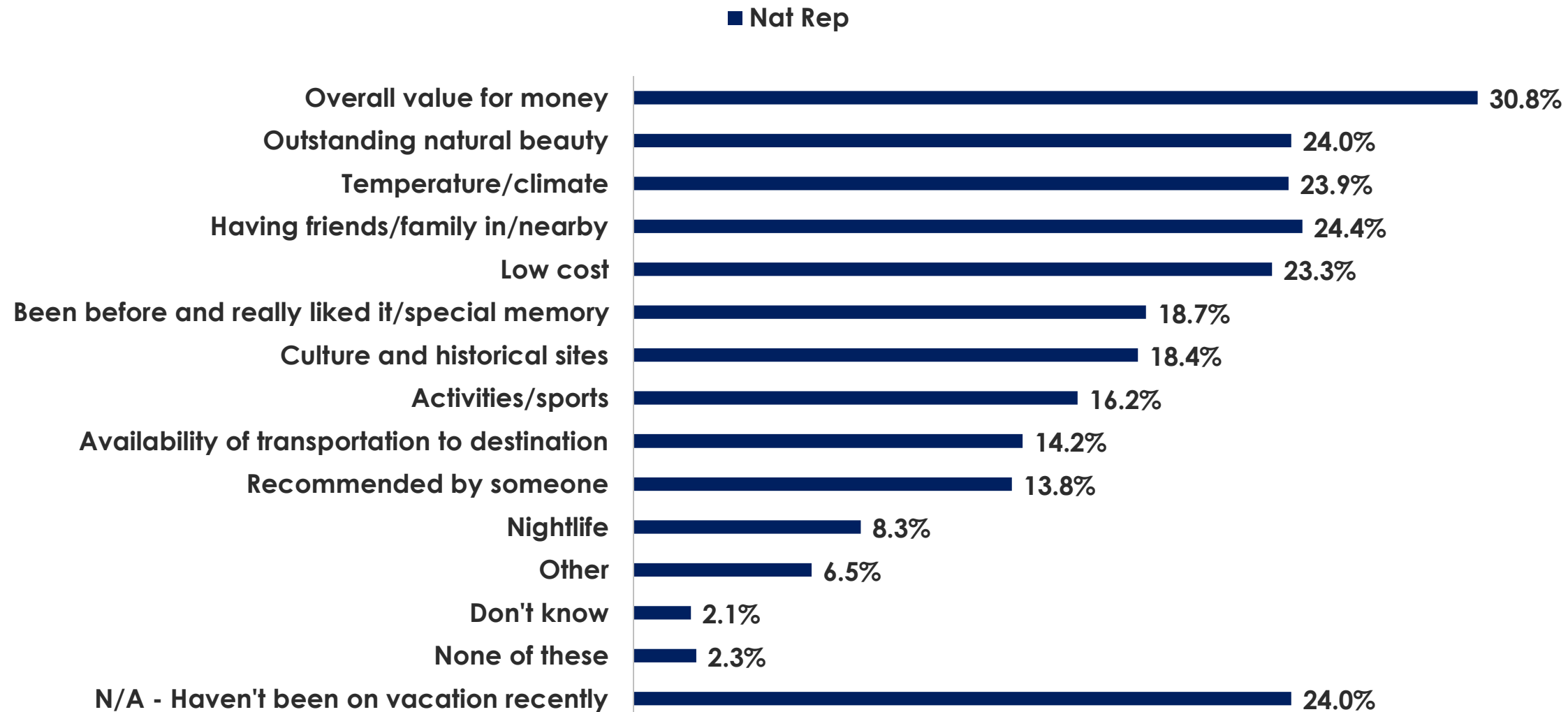


Reason for choosing most recent leisure destination

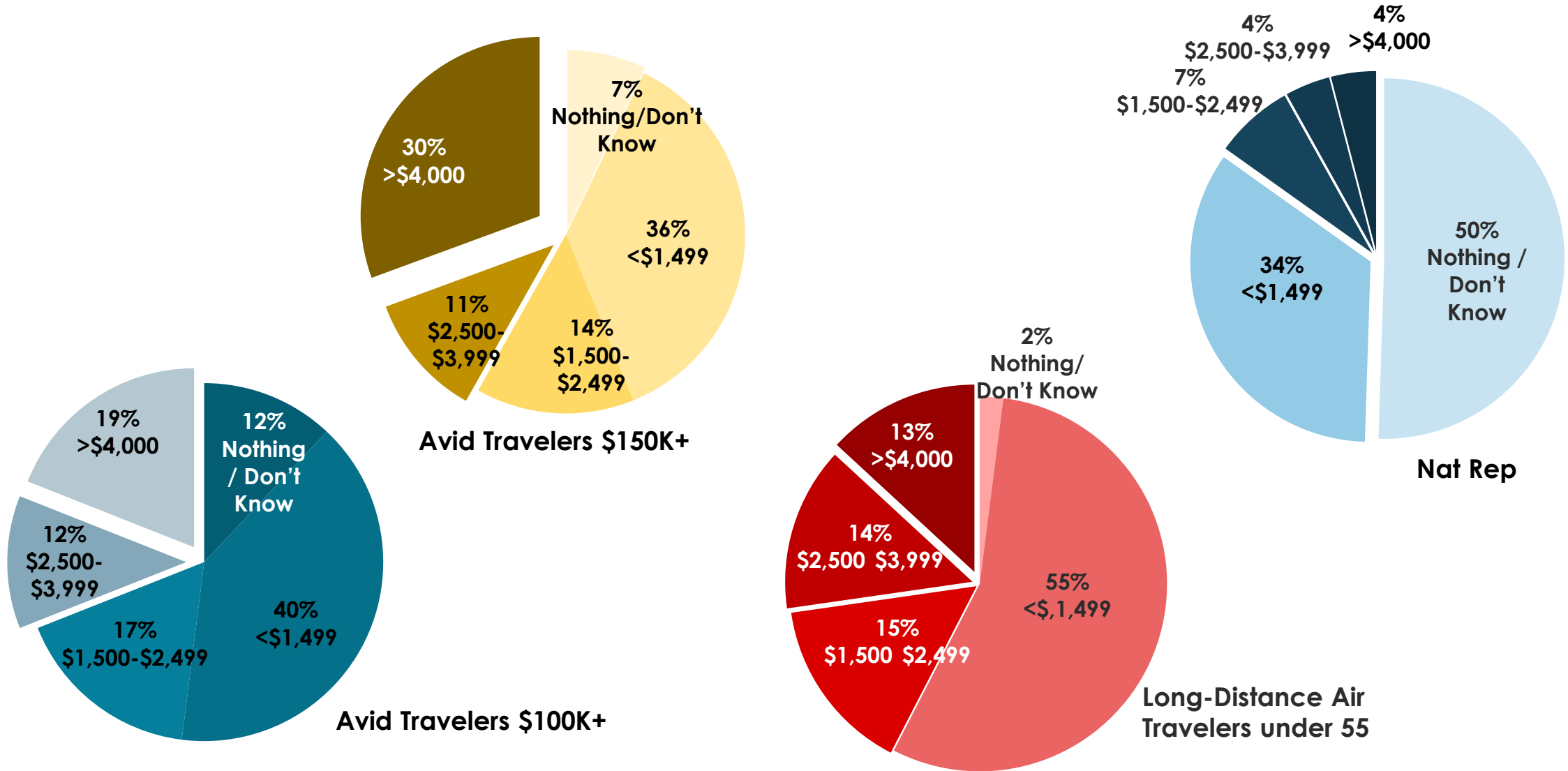
■ Long-Distance Air Traveler under 55



Reason for choosing most recent leisure destination



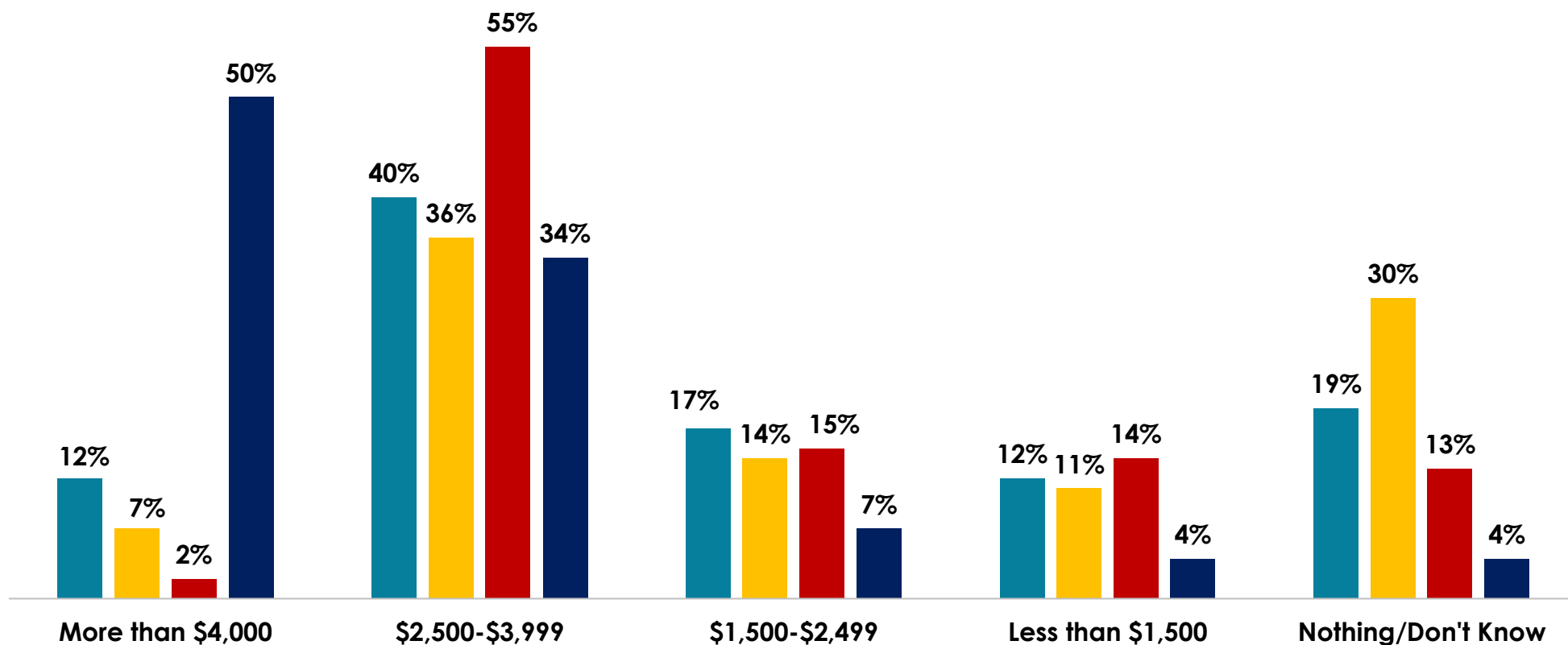
Most recent leisure trip - total spend



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

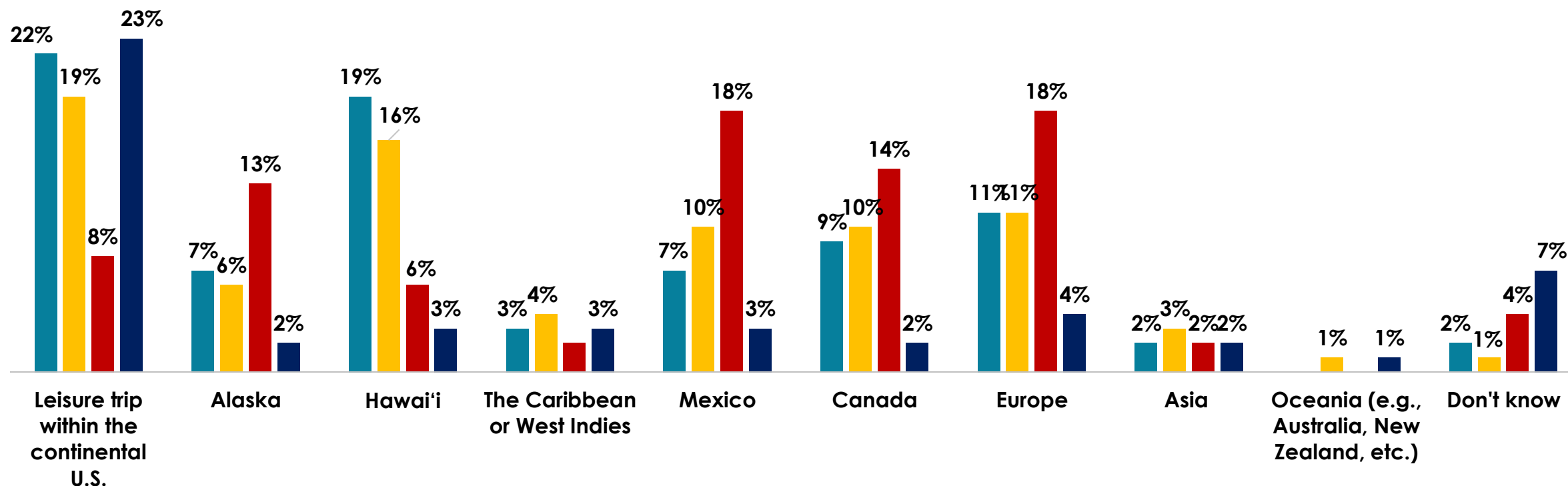
Most recent leisure trip - total spend

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Leisure trip - next destination

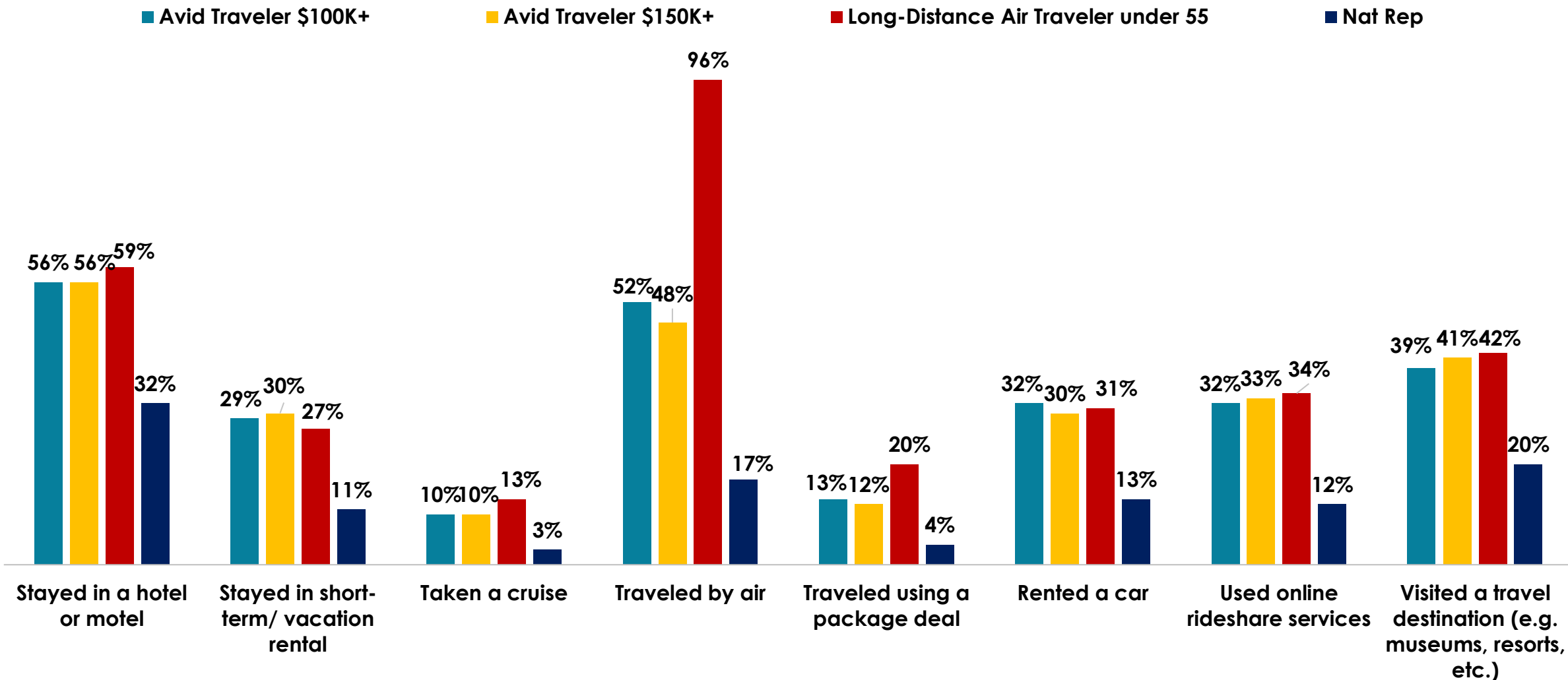
■ Avid Traveler \$100K+
 ■ Avid Traveler \$150K+*
 ■ Long-Distance Air Traveler under 55*
 ■ Nat Rep



*YouGov sample size <100

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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+
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Booking & Spending Attitudes

