

# COVID-19 Impact on U.S. Avid Travelers

An HVCB analysis of YouGov data provided by HTA as of October 17, 2021

Reported on October 21, 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)

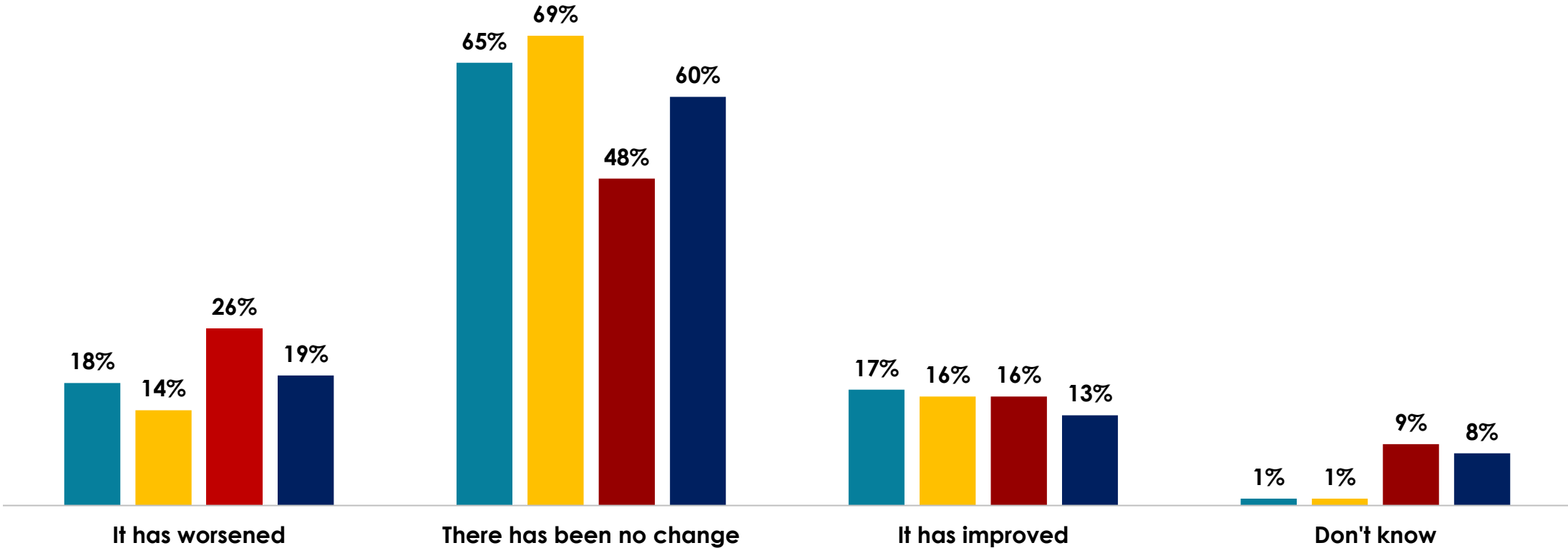
- Representative of U.S. adults in terms of age, gender, social class and education



# Travelers' Pandemic Outlook

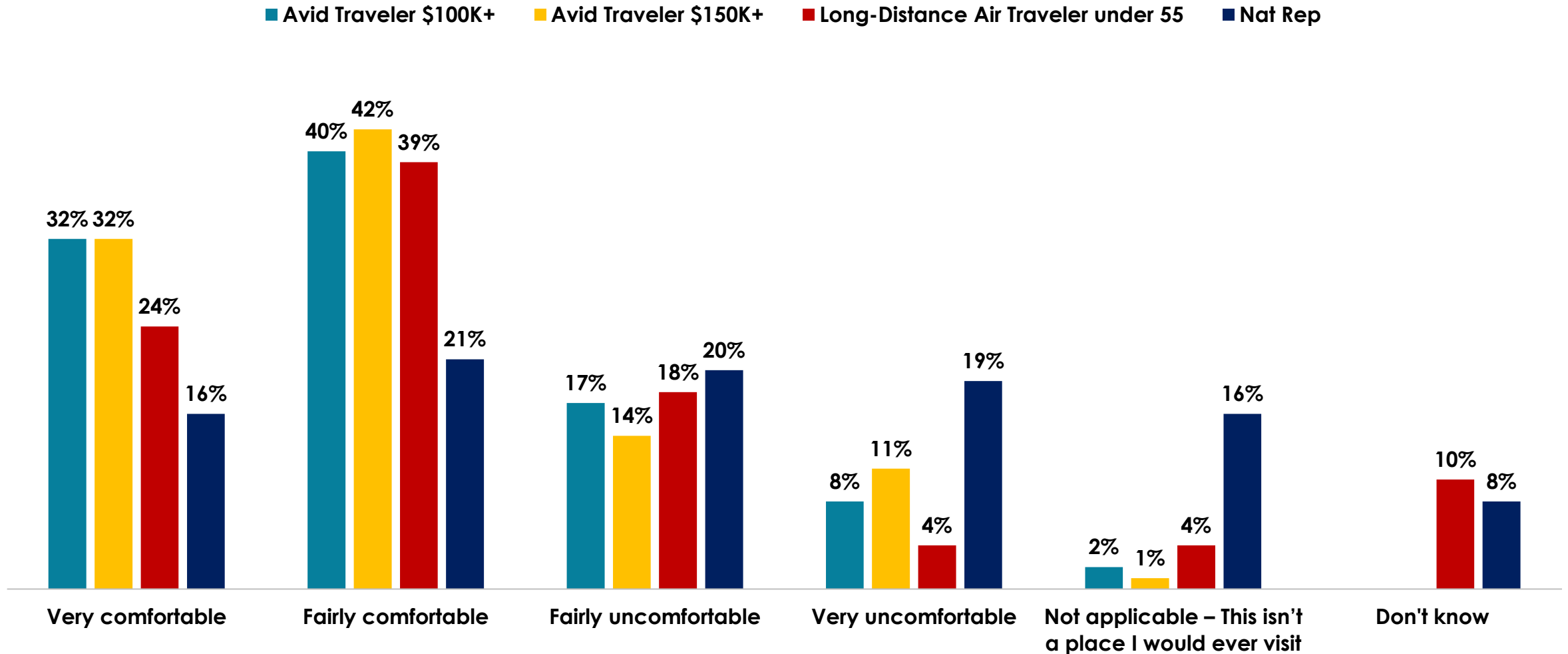
# How has your household economic situation changed in the past month?

■ 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 October 17, 2021

# Level of comfort visiting an airport right now

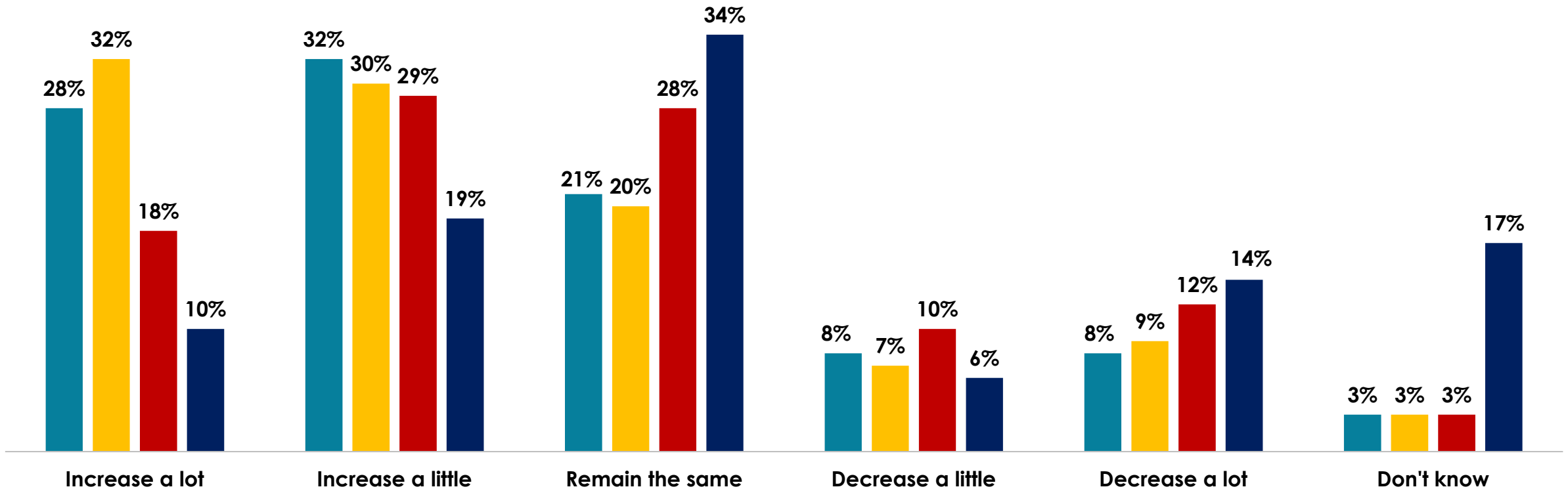




# Future Travel Plans

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

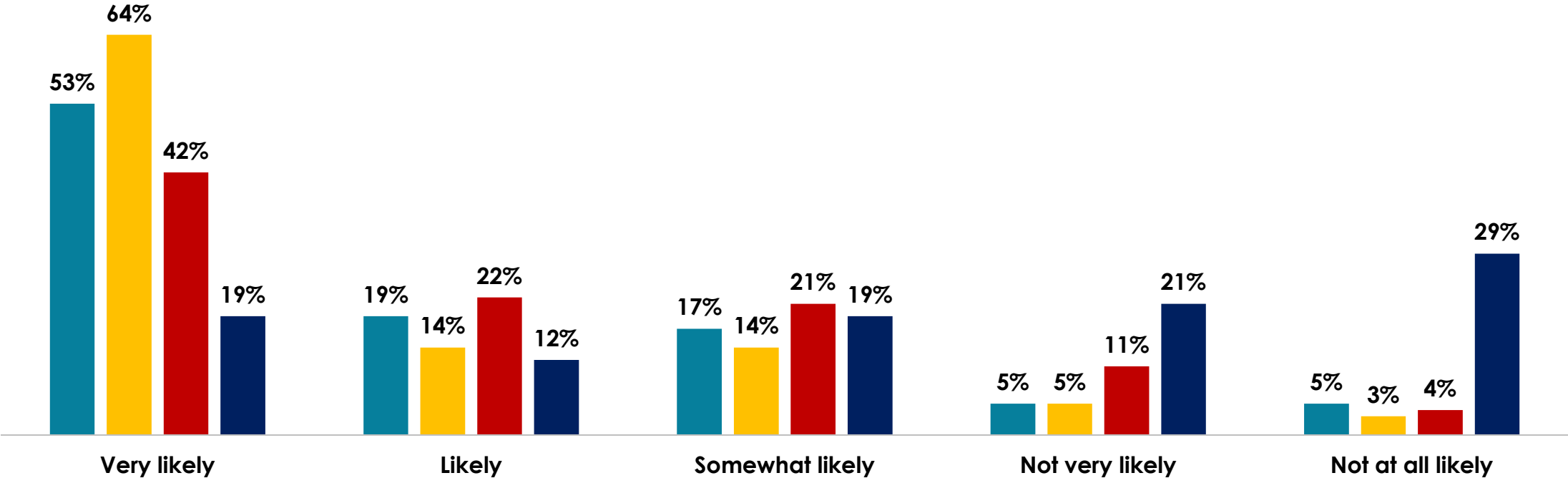
■ Avid Traveler \$100K+   ■ Avid Traveler \$150K+   ■ Long-Distance Air Traveler under 55   ■ Nat Rep





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

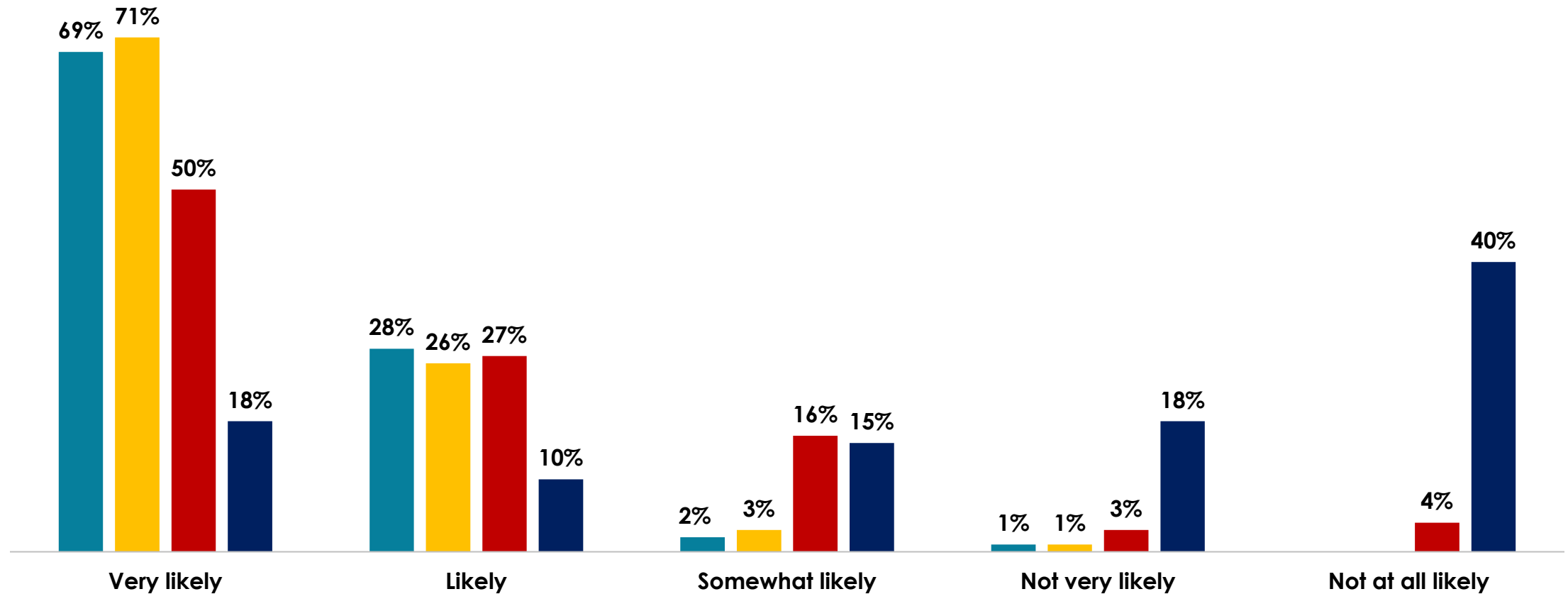
■ Avid Traveler \$100K+   ■ Avid Traveler \$150K+   ■ Long-Distance Air Traveler under 55   ■ Nat Rep



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

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



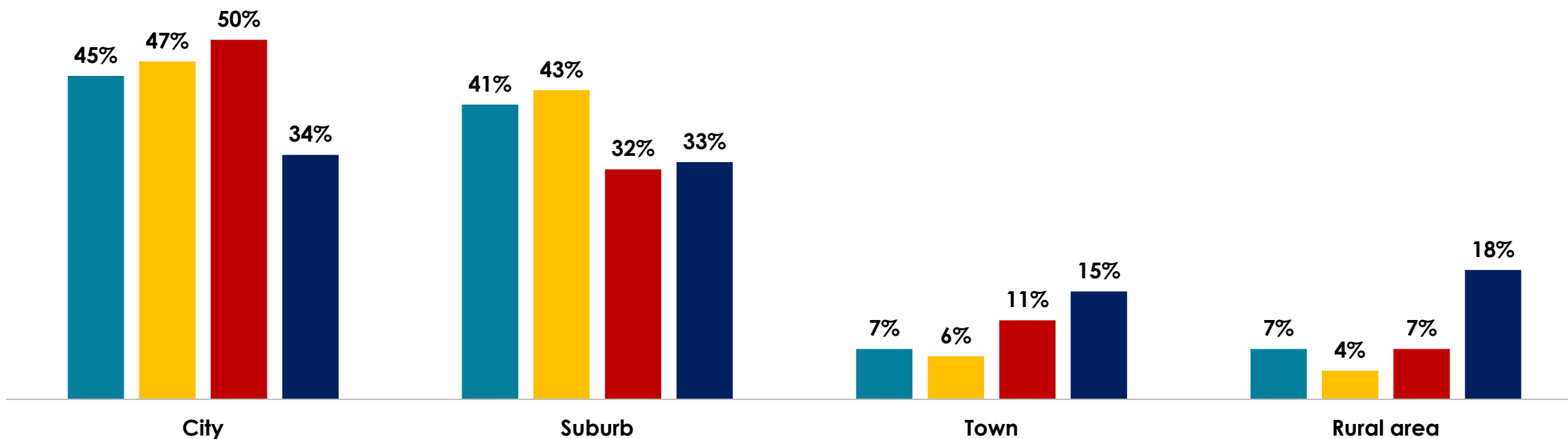


# Traveler Profiles

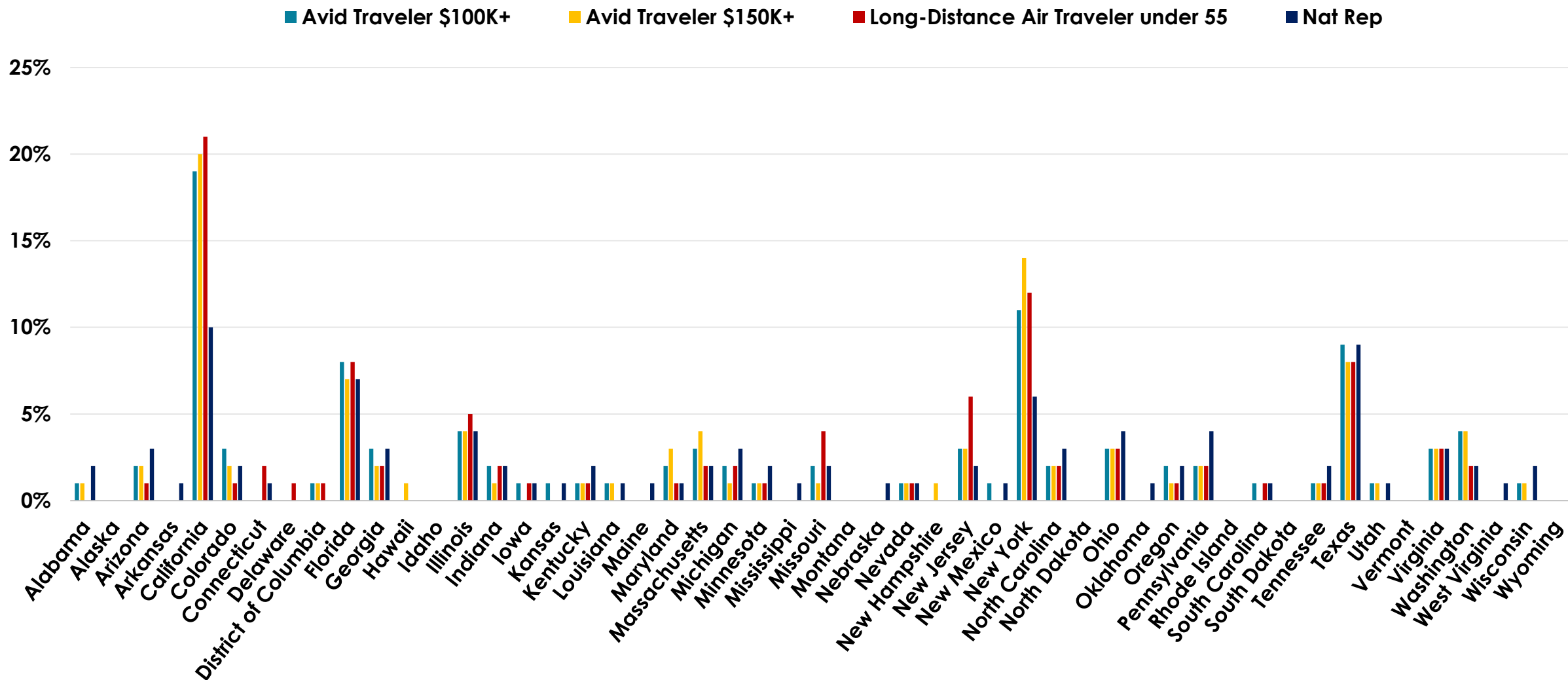
Avid Travelers vs. Long-Distance Air Travelers vs. Nat. Rep.

# 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	18.6%
New York	10.8%
Texas	9.4%
Florida	7.5%
Illinois	3.8%
Washington	3.6%
New Jersey	3.2%
Colorado	2.9%
Massachusetts	2.7%
Georgia	2.7%

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

California	20.4%
New York	13.6%
Texas	7.7%
Florida	7.1%
Washington	4.2%
Massachusetts	4.2%
Illinois	3.5%
Virginia	3.3%
Ohio	3.1%
Maryland	3.0%

## Long-Distance Air Traveler under 55

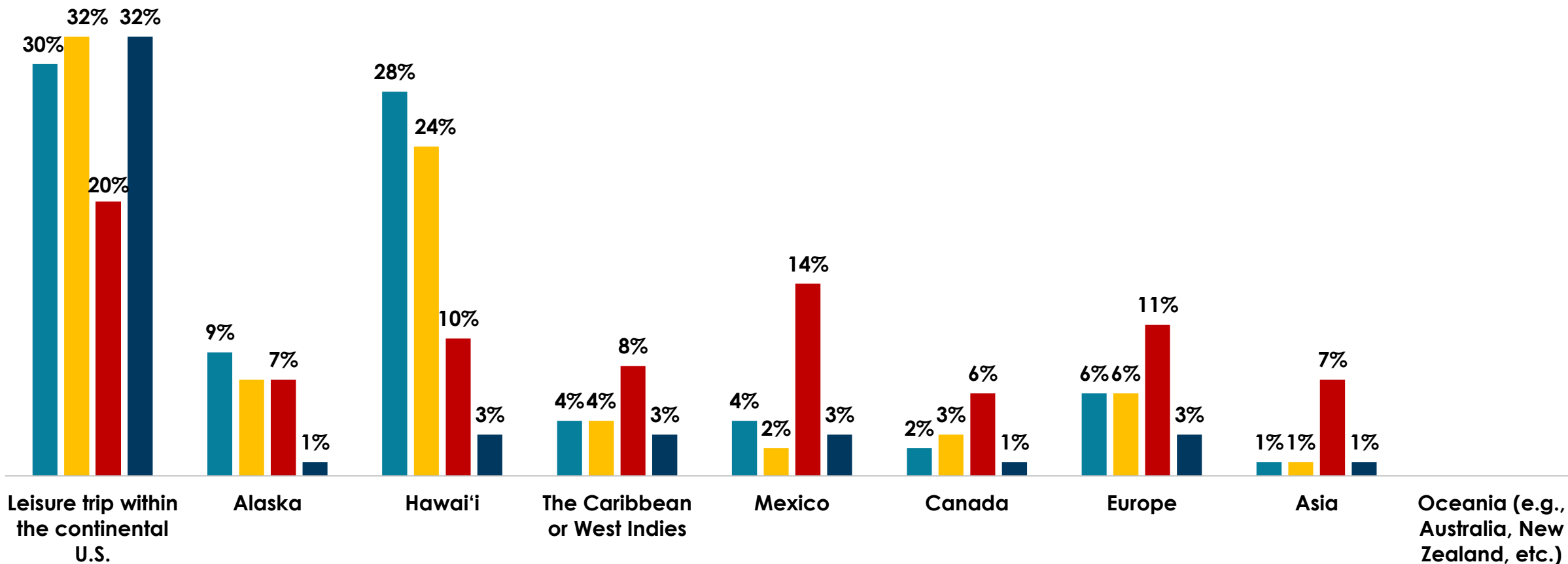
California	20.6%
New York	12.5%
Texas	8.2%
Florida	8.1%
New Jersey	5.9%
Illinois	5.0%
Missouri	3.5%
Virginia	2.9%
Ohio	2.5%
Massachusetts	2.5%

## Nat Rep

California	10.4%
Texas	8.6%
Florida	7.1%
New York	6.4%
Pennsylvania	4.3%
Illinois	3.7%
Ohio	3.7%
Georgia	3.1%
North Carolina	2.8%
Michigan	2.8%

# Leisure trip – most recent destination

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

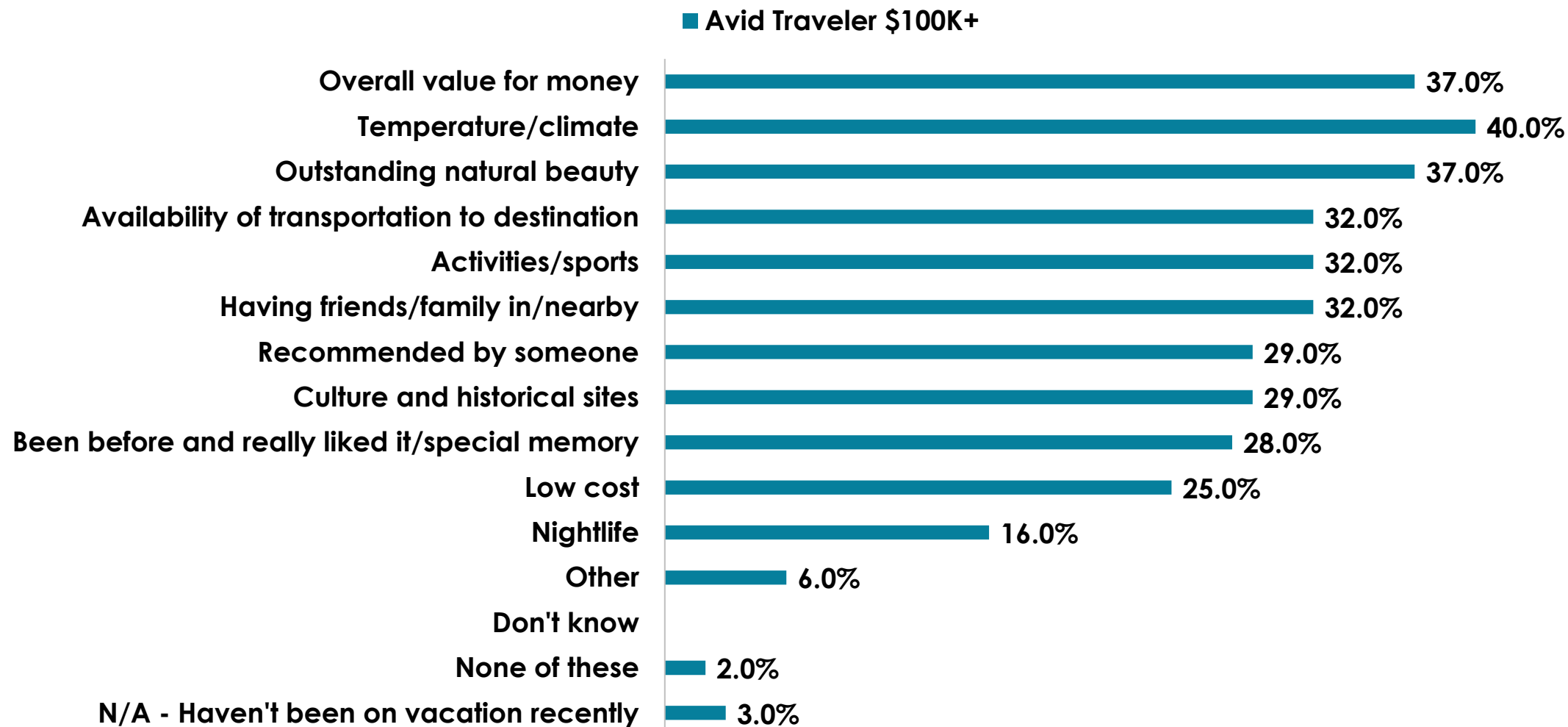


# Reason for choosing most recent leisure destination

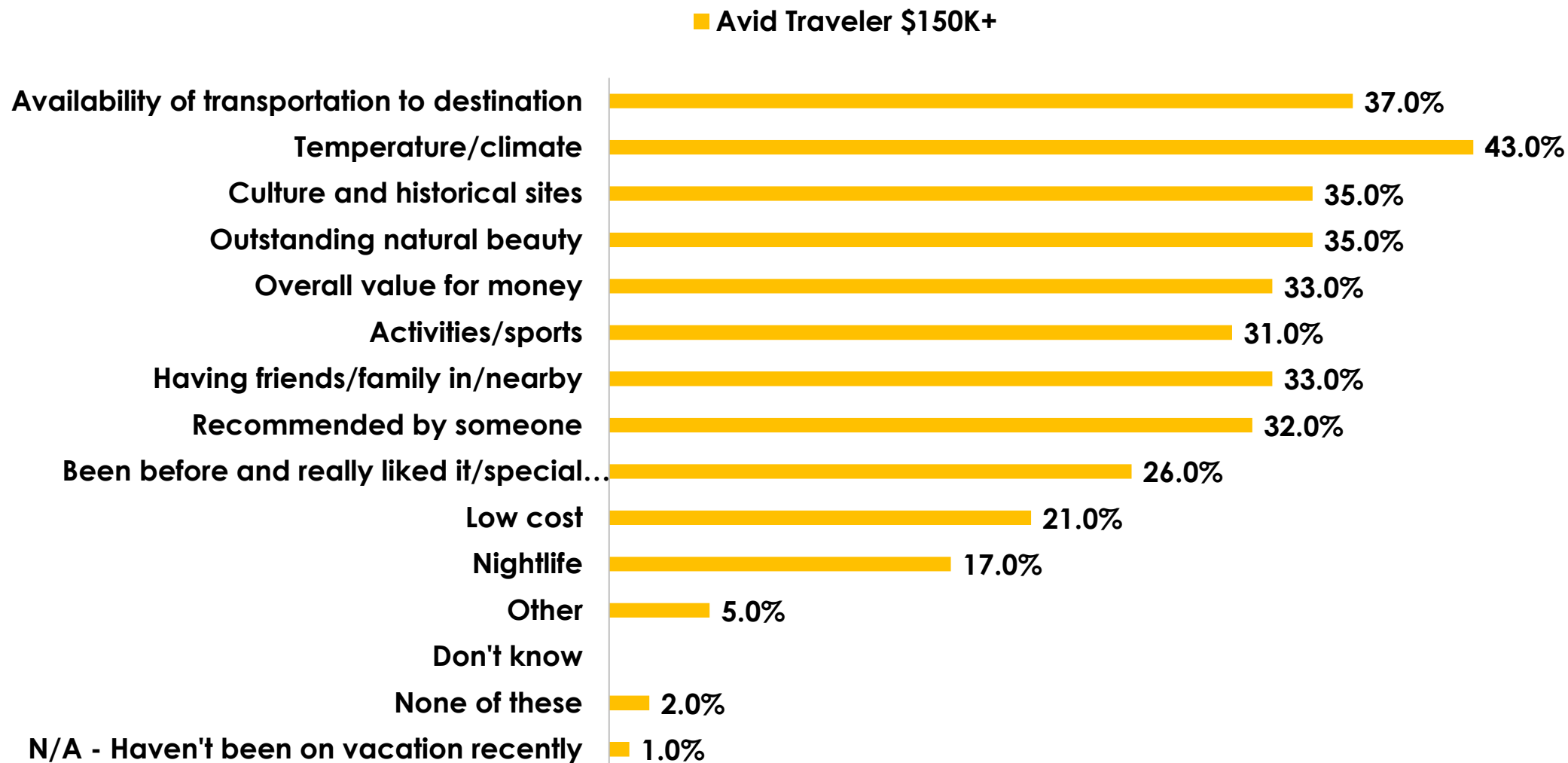
Reasons	Avid Traveler \$100K, 25-54, individual	Avid Traveler \$150K, 25-54, 2+ household	Long-Distance Air Traveler under 55	Nat Rep
The temperature/climate	40.2%	42.6%	31.3%	24.0%
Overall value for money	37.4%	32.9%	25.0%	30.3%
Outstanding natural beauty	36.9%	35.5%	20.1%	24.1%
Activities/sports	32.0%	31.1%	28.5%	16.1%
Availability of transportation to destination	32.0%	37.5%	25.4%	14.4%
Having friends/family in/nearby	31.5%	33.4%	30.7%	23.8%
Culture and historical sites	29.0%	35.0%	25.2%	18.2%
Recommended by someone	28.7%	31.7%	24.4%	13.3%
Been before and really liked it/special memory	28.0%	25.6%	19.4%	18.6%
Low cost	25.2%	21.2%	28.3%	22.7%
Nightlife	16.0%	17.2%	21.6%	8.4%
Other	5.8%	4.7%	4.1%	6.0%
Don't know	0.4%	0.0%	0.0%	2.4%
None of these	2.2%	2.3%	4.9%	2.2%
N/A - Haven't been on vacation recently	2.9%	0.9%	3.4%	24.0%



# Reason for choosing most recent leisure destination

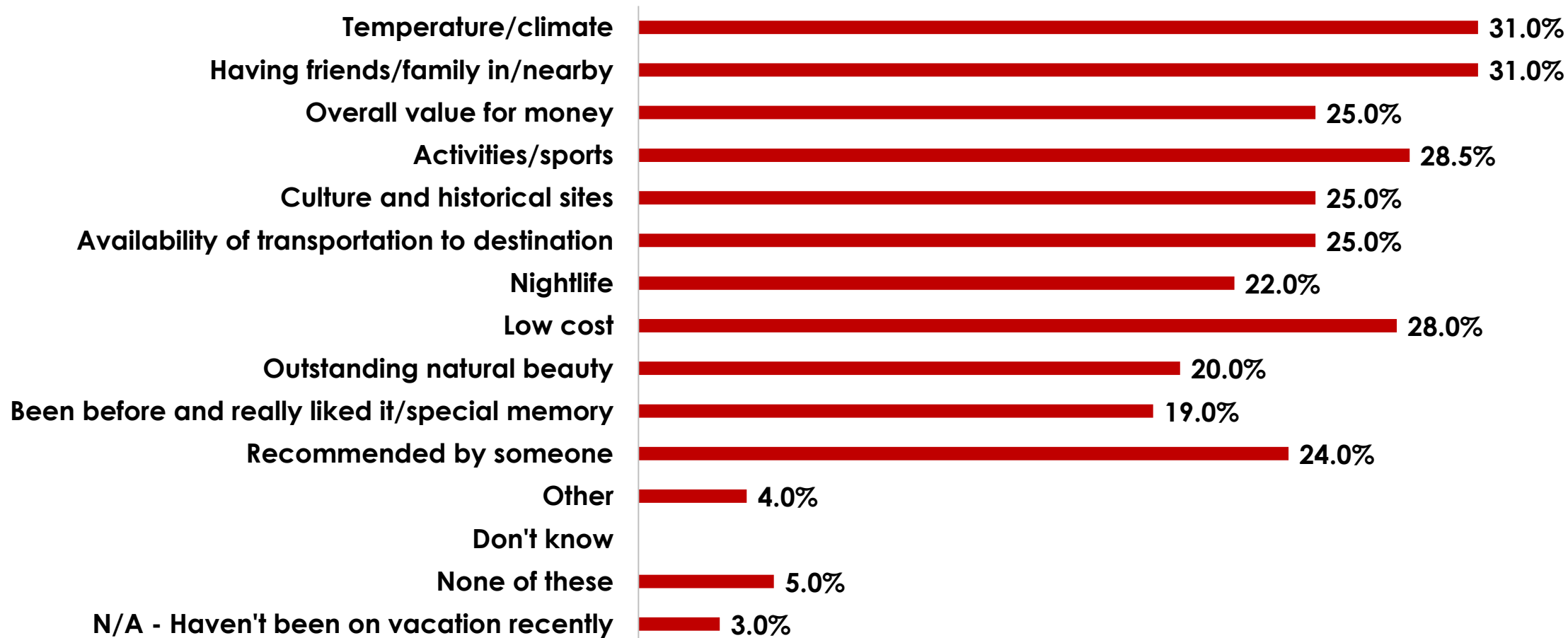


# Reason for choosing most recent leisure destination

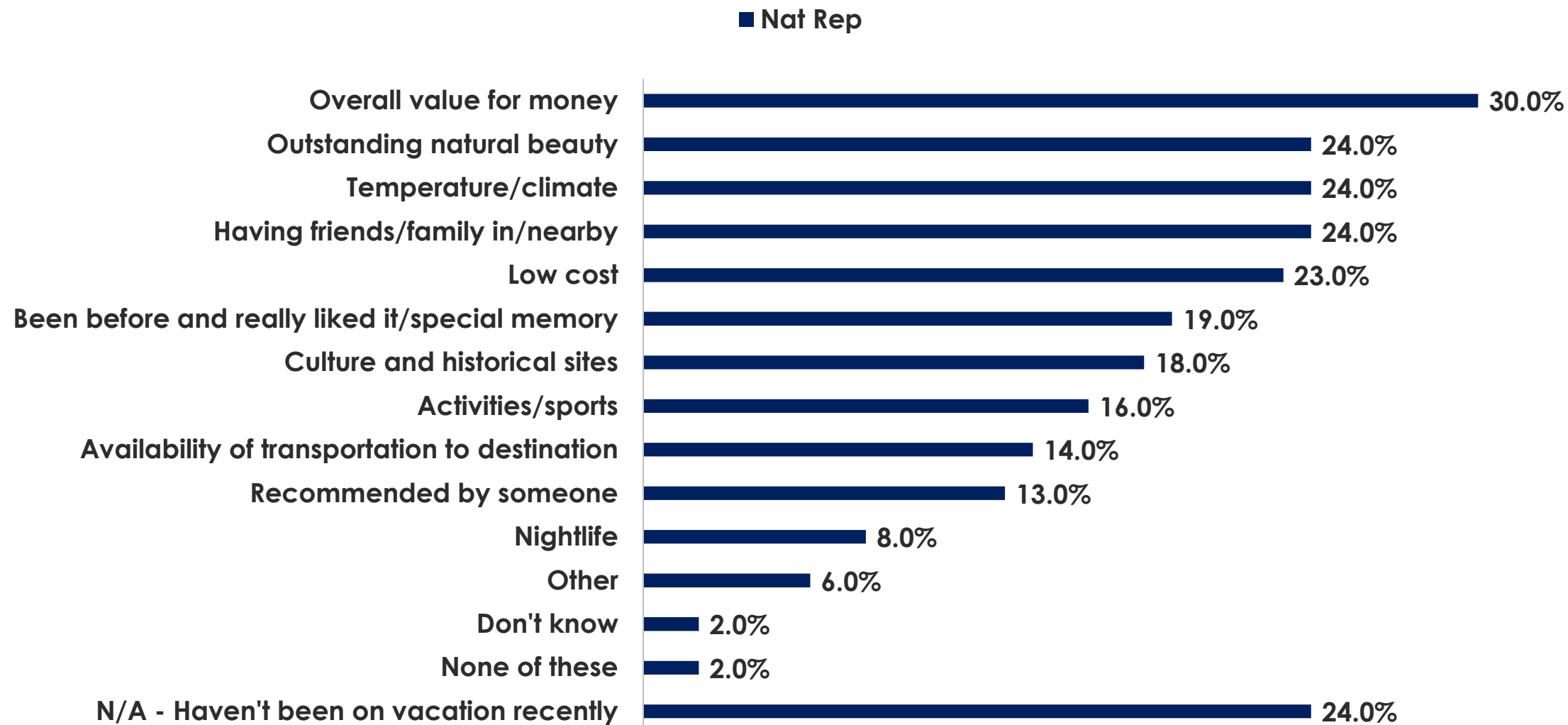


# Reason for choosing most recent leisure destination

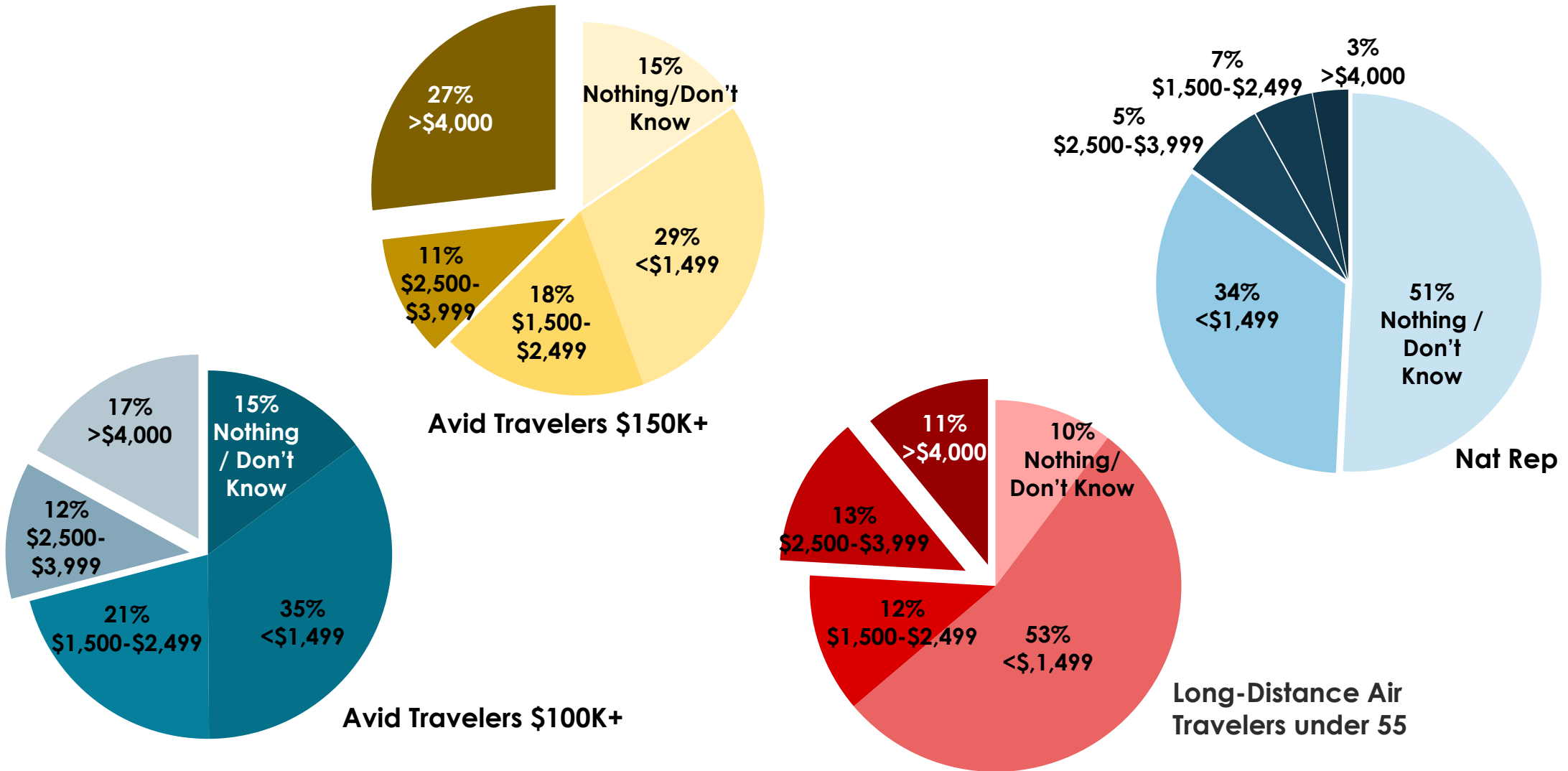
■ Long-Distance Air Traveler under 55



# Reason for choosing most recent leisure destination



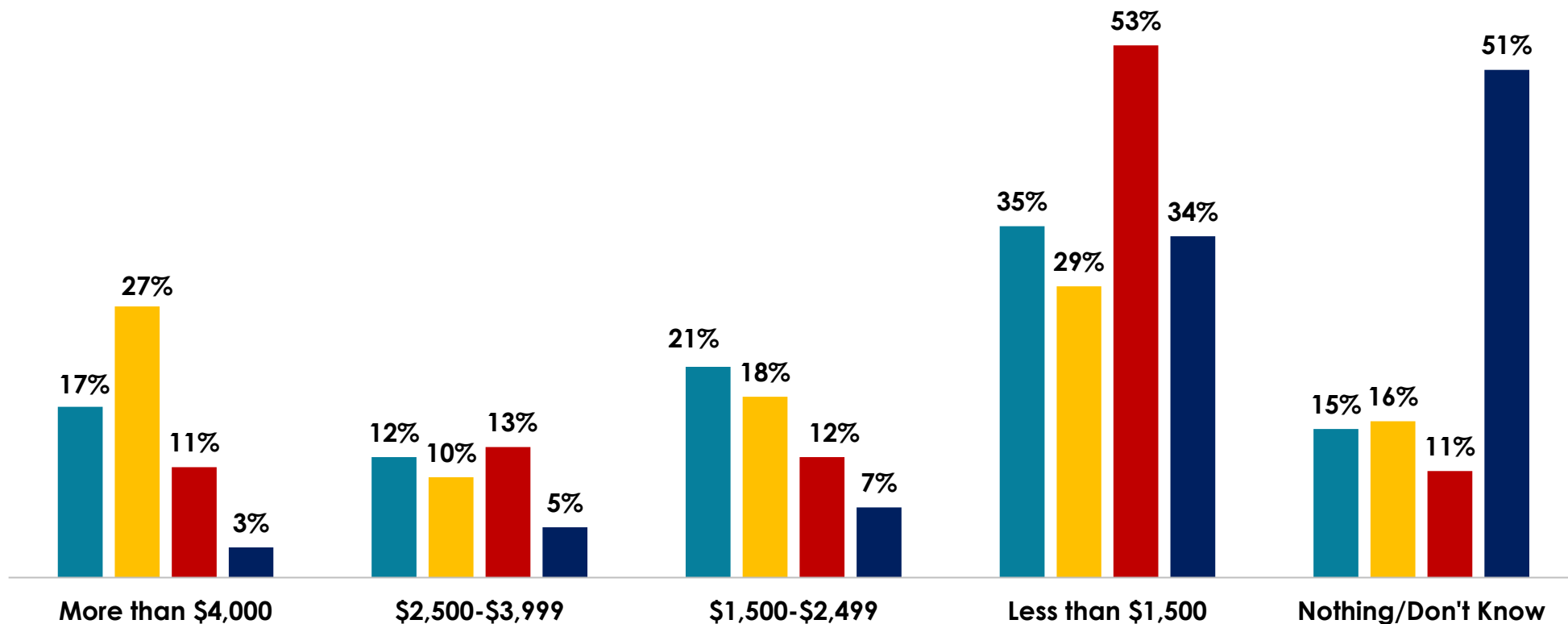
# Most recent leisure trip - total spend



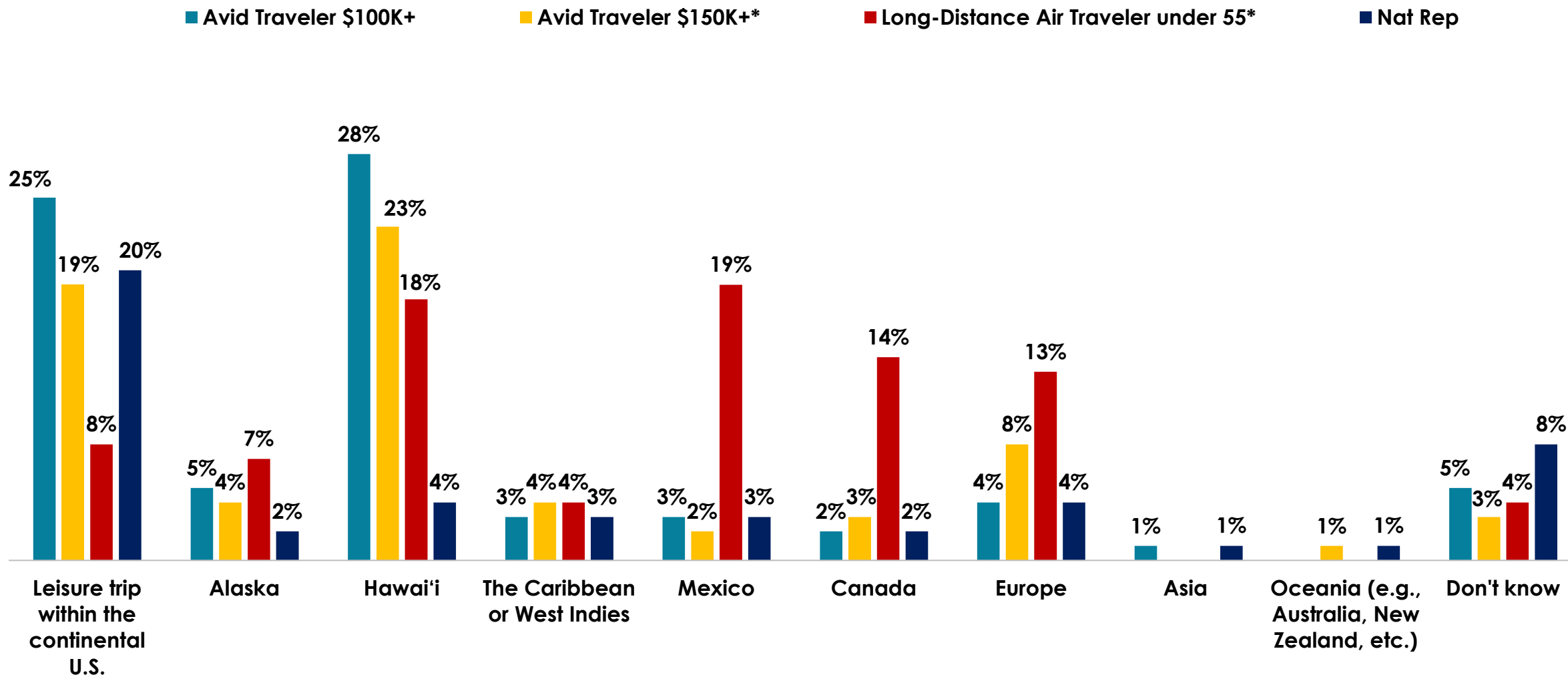
Based on Hawai'i Tourism Authority data, the average U.S. per person per trip spend for 2019 was \$1,693.32.

# Most recent leisure trip - total spend

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



# Leisure trip - next destination



\*YouGov sample size <100

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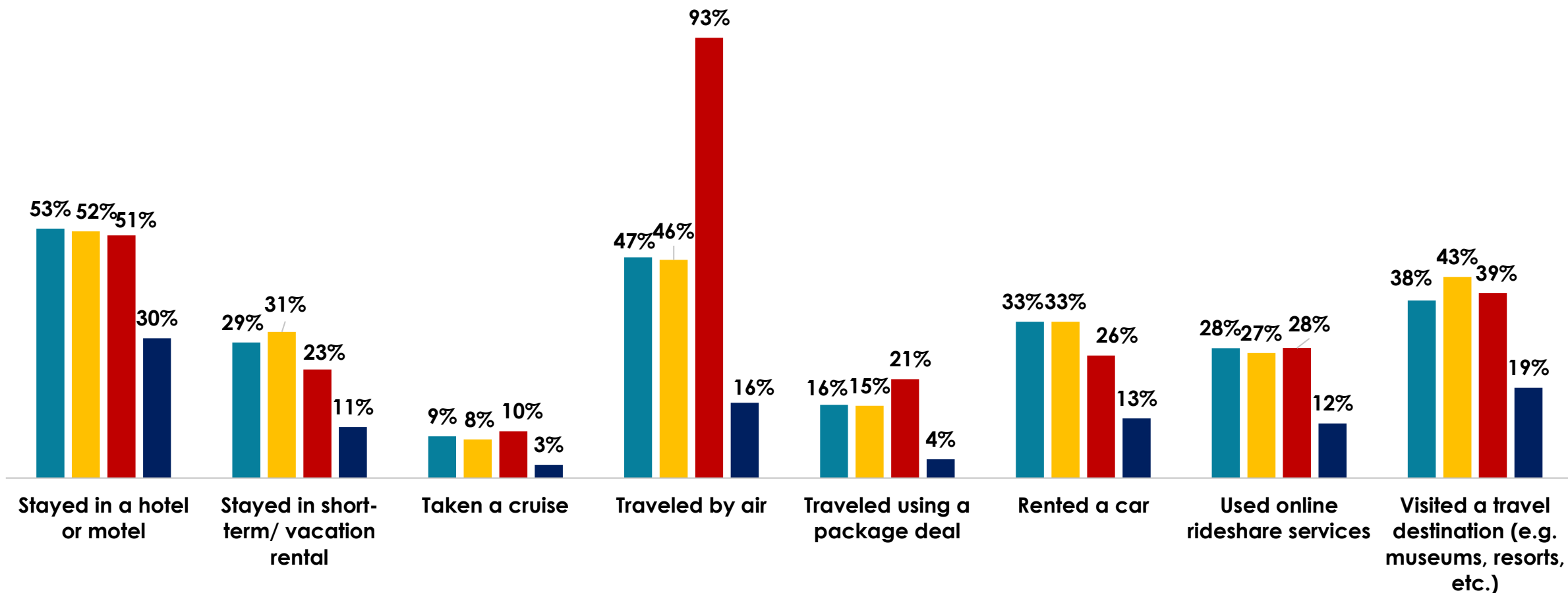
# Leisure trip - activities in last 12 months

■ Avid Traveler \$100K+

■ Avid Traveler \$150K+

■ Long-Distance Air Traveler under 55

■ Nat Rep





# 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

