COVID-19 Impact on U.S. Avid Travelers

An HVCB analysis of YouGov data provided by HTA as of November 7, 2021
Reported on November 18, 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?

- It has worsened
- There has been no change
- It has improved
- Don't know

**Avid Traveler $100K+**
- It has worsened: 14%
- There has been no change: 74%
- It has improved: 19%
- Don't know: 1%

**Avid Traveler $150K+**
- It has worsened: 9%
- There has been no change: 48%
- It has improved: 16%
- Don't know: 2%

**Long-Distance Air Traveler under 55**
- It has worsened: 20%
- There has been no change: 59%
- It has improved: 20%
- Don't know: 7%

**Nat Rep**
- It has worsened: 25%
- There has been no change: 25%
- It has improved: 59%
- Don't know: 8%

Source: HVCB analysis of YouGov data provided by HTA as of November 7, 2021
Level of comfort visiting an airport right now

Source: HVCB analysis of YouGov data provided by HTA as of November 7, 2021
Future Travel Plans
Future Travel – Expected change to air travel in the next 12 months

Source: HVCB analysis of YouGov data provided by HTA as of November 7, 2021
Future Travel – Likelihood of purchasing travel or leisure services in the next 12 months

- **Very likely**
  - Avid Traveler $100K+: 54%
  - Avid Traveler $150K+: 43%
  - Nat Rep: 59%

- **Likely**
  - Avid Traveler $100K+: 19%
  - Avid Traveler $150K+: 19%
  - Nat Rep: 17%

- **Somewhat likely**
  - Avid Traveler $100K+: 15%
  - Avid Traveler $150K+: 24%
  - Nat Rep: 13%

- **Not very likely**
  - Avid Traveler $100K+: 17%
  - Avid Traveler $150K+: 14%
  - Nat Rep: 22%

- **Not at all likely**
  - Avid Traveler $100K+: 19%
  - Avid Traveler $150K+: 20%
  - Nat Rep: 20%

Source: HVCB analysis of YouGov data provided by HTA as of November 7, 2021
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

Source: HVCB analysis of YouGov data provided by HTA as of November 7, 2021
Traveler Profiles
Avid Travelers vs. Long-Distance Air Travelers vs. Nat. Rep.
Type of Area Living In

<table>
<thead>
<tr>
<th>Category</th>
<th>Avid Traveler $100K+</th>
<th>Avid Traveler $150K+</th>
<th>Long-Distance Air Traveler under 55</th>
<th>Nat Rep</th>
</tr>
</thead>
<tbody>
<tr>
<td>City</td>
<td>45%</td>
<td>44%</td>
<td>6%</td>
<td>8%</td>
</tr>
<tr>
<td>Suburb</td>
<td>41%</td>
<td>44%</td>
<td>31%</td>
<td>6%</td>
</tr>
<tr>
<td>Town</td>
<td></td>
<td></td>
<td>10%</td>
<td>14%</td>
</tr>
<tr>
<td>Rural area</td>
<td></td>
<td></td>
<td>8%</td>
<td>6%</td>
</tr>
</tbody>
</table>

Source: HVCB analysis of YouGov data provided by HTA as of November 7, 2021
State of Residence

- 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 November 7, 2021
## Top 10 States of Residence by Segment

<table>
<thead>
<tr>
<th>Segment</th>
<th><strong>Avid Traveler</strong></th>
<th><strong>Avid Traveler</strong></th>
<th><strong>Long-Distance Air Traveler</strong></th>
<th><strong>Nat Rep</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$100K, 25-54, individual</td>
<td>$150K, 25-54, 2+ household</td>
<td>under 55</td>
<td></td>
</tr>
<tr>
<td>California</td>
<td>20.4%</td>
<td>California</td>
<td>23.6%</td>
<td>California</td>
</tr>
<tr>
<td>New York</td>
<td>10.6%</td>
<td>New York</td>
<td>12.0%</td>
<td>10.3%</td>
</tr>
<tr>
<td>Texas</td>
<td>9.0%</td>
<td>Texas</td>
<td>7.7%</td>
<td>Texas</td>
</tr>
<tr>
<td>Florida</td>
<td>6.2%</td>
<td>Florida</td>
<td>7.6%</td>
<td>Florida</td>
</tr>
<tr>
<td>Washington</td>
<td>3.8%</td>
<td>Massachusetts</td>
<td>7.7%</td>
<td>New York</td>
</tr>
<tr>
<td>Illinois</td>
<td>3.6%</td>
<td>Washington</td>
<td>4.7%</td>
<td>California</td>
</tr>
<tr>
<td>New Jersey</td>
<td>3.1%</td>
<td>New Jersey</td>
<td>3.8%</td>
<td>8.8%</td>
</tr>
<tr>
<td>Virginia</td>
<td>3.0%</td>
<td>Virginia</td>
<td>3.4%</td>
<td>Texas</td>
</tr>
<tr>
<td>Massachusetts</td>
<td>2.9%</td>
<td>Arizona</td>
<td>2.4%</td>
<td>Florida</td>
</tr>
<tr>
<td>Ohio</td>
<td>2.6%</td>
<td></td>
<td>2.3%</td>
<td>Pennsylvania</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: HVCB analysis of YouGov data provided by HTA as of November 7, 2021
Leisure trip – most recent destination

- Leisure trip within the continental U.S.: 31%, 31%, 31%
- Alaska: 9%, 8%, 6%, 1%
- Hawai’i: 28%, 23%
- The Caribbean or West Indies: 9%, 3%
- Mexico: 16%
- Canada: 3%, 5%, 1%
- Europe: 15%
- Asia: 8%, 6%, 3%, 1%, 2%, 1%
- Oceania (e.g., Australia, New Zealand, etc.): 4%

Source: HVCB analysis of YouGov data provided by HTA as of November 7, 2021
### Reason for choosing most recent leisure destination

<table>
<thead>
<tr>
<th>Reasons</th>
<th>Avid Traveler $100K, 25-54, individual</th>
<th>Avid Traveler $150K, 25-54, 2+ household</th>
<th>Long-Distance Air Traveler under 55</th>
<th>Nat Rep</th>
</tr>
</thead>
<tbody>
<tr>
<td>The temperature/climate</td>
<td>39.9%</td>
<td>45.4%</td>
<td>32.8%</td>
<td>23.9%</td>
</tr>
<tr>
<td>Availability of transportation to destination</td>
<td>31.6%</td>
<td>39.1%</td>
<td>26.9%</td>
<td>14.5%</td>
</tr>
<tr>
<td>Culture and historical sites</td>
<td>25.9%</td>
<td>33.0%</td>
<td>27.2%</td>
<td>18.3%</td>
</tr>
<tr>
<td>Overall value for money</td>
<td>34.6%</td>
<td>31.7%</td>
<td>26.8%</td>
<td>30.5%</td>
</tr>
<tr>
<td>Activities/sports</td>
<td>29.9%</td>
<td>30.9%</td>
<td>27.5%</td>
<td>16.1%</td>
</tr>
<tr>
<td>Outstanding natural beauty</td>
<td>36.1%</td>
<td>38.2%</td>
<td>22.8%</td>
<td>24.2%</td>
</tr>
<tr>
<td>Nightlife</td>
<td>14.4%</td>
<td>13.8%</td>
<td>19.1%</td>
<td>8.4%</td>
</tr>
<tr>
<td>Having friends/family in/nearby</td>
<td>33.7%</td>
<td>32.4%</td>
<td>30.2%</td>
<td>23.9%</td>
</tr>
<tr>
<td>Low cost</td>
<td>27.1%</td>
<td>25.4%</td>
<td>29.7%</td>
<td>22.8%</td>
</tr>
<tr>
<td>Been before and really liked it/special memory</td>
<td>28.6%</td>
<td>25.5%</td>
<td>24.7%</td>
<td>18.7%</td>
</tr>
<tr>
<td>Recommended by someone</td>
<td>27.3%</td>
<td>27.9%</td>
<td>27.9%</td>
<td>13.2%</td>
</tr>
<tr>
<td>Other</td>
<td>6.2%</td>
<td>4.2%</td>
<td>3.8%</td>
<td>6.1%</td>
</tr>
<tr>
<td>Don't know</td>
<td>0.3%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>2.2%</td>
</tr>
<tr>
<td>None of these</td>
<td>1.4%</td>
<td>1.5%</td>
<td>4.9%</td>
<td>2.3%</td>
</tr>
<tr>
<td>N/A - Haven't been on vacation recently</td>
<td>3.1%</td>
<td>1.3%</td>
<td>2.6%</td>
<td>24.3%</td>
</tr>
</tbody>
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## Reason for choosing most recent leisure destination

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<tr>
<td>Don’t know</td>
<td>0.3%</td>
</tr>
<tr>
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<tr>
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Reason for choosing most recent leisure destination

Source: HVCB analysis of YouGov data provided by HTA as of November 7, 2021
Reason for choosing most recent leisure destination

- **Long-Distance Air Traveler under 55**

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<th>Reason</th>
<th>Percentage</th>
</tr>
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<tbody>
<tr>
<td>Temperature/climate</td>
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</tr>
<tr>
<td>Having friends/family in/nearby</td>
<td>30.2%</td>
</tr>
<tr>
<td>Overall value for money</td>
<td>26.8%</td>
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<tr>
<td>Activities/sports</td>
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<tr>
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</tr>
<tr>
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</tr>
<tr>
<td>Recommended by someone</td>
<td>27.9%</td>
</tr>
<tr>
<td>Other</td>
<td>3.8%</td>
</tr>
<tr>
<td>Don’t know</td>
<td></td>
</tr>
<tr>
<td>None of these</td>
<td>4.9%</td>
</tr>
<tr>
<td>N/A - Haven’t been on vacation recently</td>
<td>2.6%</td>
</tr>
</tbody>
</table>

Source: HVCB analysis of YouGov data provided by HTA as of November 7, 2021
Reason for choosing most recent leisure destination

- Overall value for money: 30.5%
- Outstanding natural beauty: 24.2%
- Temperature/climate: 23.9%
- Having friends/family in/nearby: 23.9%
- Low cost: 22.8%
- Been before and really liked it/special memory: 18.7%
- Culture and historical sites: 18.3%
- Activities/sports: 16.1%
- Availability of transportation to destination: 14.5%
- Recommended by someone: 13.2%
- Nightlife: 8.4%
- Other: 6.1%
- Don't know: 2.2%
- None of these: 2.3%
- N/A - Haven't been on vacation recently: 24.3%

Source: HVCB analysis of YouGov data provided by HTA as of November 7, 2021
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.

Source: HVCB analysis of YouGov data provided by HTA as of November 7, 2021
Most recent leisure trip - total spend

Source: HVCB analysis of YouGov data provided by HTA as of November 7, 2021
Leisure trip - next destination

- 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 November 7, 2021

*YouGov sample size <100
Leisure trip - activities in last 12 months

- Stayed in a hotel or motel
- Stayed in short-term/vacation rental
- Taken a cruise
- Traveled by air
- Traveled using a package deal
- Rented a car
- Used online rideshare services
- Visited a travel destination (e.g., museums, resorts, etc.)

Source: HVCB analysis of YouGov data provided by HTA as of November 7, 2021
Travel Mindset

I am passionate about traveling

You can only ever get to know a country by experiencing its culture

When I go on vacation, I like to go off the beaten track

I like to come back from vacation having learnt something new

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 November 7, 2021
Travel Activities

- **I like to spend my leisure time relaxing**
  - Avid Traveler $100K+: 84%
  - Avid Traveler $150K+: 80%
  - Long-Distance Air Traveler under 55: 84%
  - Nat Rep: 83%

- **I tend to spend my leisure time on hobbies and activities**
  - Avid Traveler $100K+: 83%
  - Avid Traveler $150K+: 85%
  - Long-Distance Air Traveler under 55: 85%
  - Nat Rep: 81%

- **When I go on vacation I only want to eat, drink and lie in the sun**
  - Avid Traveler $100K+: 56%
  - Avid Traveler $150K+: 57%
  - Long-Distance Air Traveler under 55: 51%
  - Nat Rep: 43%

Source: HVCB analysis of YouGov data provided by HTA as of November 7, 2021
# Booking & Spending Attitudes

<table>
<thead>
<tr>
<th>Statement</th>
<th>Avid Traveler $100K+</th>
<th>Avid Traveler $150K+</th>
<th>Long-Distance Air Traveler under 55</th>
<th>Nat Rep</th>
</tr>
</thead>
<tbody>
<tr>
<td>I usually wait for last minute deals rather than planning my vacations in advance</td>
<td>39%</td>
<td>37%</td>
<td>32%</td>
<td>54%</td>
</tr>
<tr>
<td>I tend to book my vacations outside of school vacations/breaks</td>
<td>57%</td>
<td>60%</td>
<td>66%</td>
<td></td>
</tr>
<tr>
<td>I usually go back to the same places on vacation</td>
<td>51%</td>
<td>48%</td>
<td>54%</td>
<td>48%</td>
</tr>
<tr>
<td>When I'm planning my next vacation, I have at least one destination in mind or already selected</td>
<td>69%</td>
<td>81%</td>
<td>87%</td>
<td>90%</td>
</tr>
</tbody>
</table>

Source: HVCB analysis of YouGov data provided by HTA as of November 7, 2021
Booking & Spending Attitudes

- **I would never think of taking a package holiday/vacations**
  - Avid Traveler $100K+: 37%
  - Avid Traveler $150K+: 42%
  - Long-Distance Air Traveler under 55: 32%
  - Nat Rep: 49%

- **I try to keep to a strict budget when I go on vacation**
  - Avid Traveler $100K+: 47%
  - Avid Traveler $150K+: 42%
  - Long-Distance Air Traveler under 55: 57%
  - Nat Rep: 53%

- **I am excited to generally spend more when traveling**
  - Avid Traveler $100K+: 65%
  - Avid Traveler $150K+: 66%
  - Long-Distance Air Traveler under 55: 71%
  - Nat Rep: 47%

Source: HVCB analysis of YouGov data provided by HTA as of November 7, 2021