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 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

<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>It has worsened</td>
<td>17%</td>
<td>22%</td>
<td>17%</td>
<td>3%</td>
</tr>
<tr>
<td>There has been no change</td>
<td>63%</td>
<td>66%</td>
<td>53%</td>
<td>16%</td>
</tr>
<tr>
<td>It has improved</td>
<td>17%</td>
<td>17%</td>
<td>20%</td>
<td>8%</td>
</tr>
<tr>
<td>Don't know</td>
<td>17%</td>
<td>21%</td>
<td>13%</td>
<td>8%</td>
</tr>
</tbody>
</table>

Source: HVCB analysis of YouGov data provided by HTA as of February 6, 2022
Level of comfort visiting an airport right now

<table>
<thead>
<tr>
<th>Level of Comfort</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>Very comfortable</td>
<td>22%</td>
<td>24%</td>
<td>17%</td>
<td>24%</td>
</tr>
<tr>
<td>Fairly comfortable</td>
<td>22%</td>
<td>24%</td>
<td>19%</td>
<td>24%</td>
</tr>
<tr>
<td>Fairly uncomfortable</td>
<td>19%</td>
<td>19%</td>
<td>11%</td>
<td>15%</td>
</tr>
<tr>
<td>Very uncomfortable</td>
<td>15%</td>
<td>17%</td>
<td>11%</td>
<td>15%</td>
</tr>
<tr>
<td>Not applicable – This isn’t a place I would ever visit</td>
<td>5%</td>
<td>2%</td>
<td>2%</td>
<td>6%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>6%</td>
<td>2%</td>
<td>2%</td>
<td>7%</td>
</tr>
</tbody>
</table>

Source: HVCB analysis of YouGov data provided by HTA as of February 6, 2022
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 February 6, 2022
Future Travel – Likelihood of purchasing travel or leisure services in the next 12 months

Source: HVCB analysis of YouGov data provided by HTA as of February 6, 2022
Future Travel – Likelihood of booking a flight in the next 12 months

- **Very likely**: 69% (Avid Traveler $100K+), 73% (Avid Traveler $150K+), 28% (Long-Distance Air Traveler under 55), 18% (Nat Rep)
- **Likely**: 25% (Avid Traveler $100K+), 27% (Avid Traveler $150K+), 10% (Long-Distance Air Traveler under 55), 18% (Nat Rep)
- **Somewhat likely**: 12% (Avid Traveler $100K+), 15% (Avid Traveler $150K+), 2% (Long-Distance Air Traveler under 55), 2% (Nat Rep)
- **Not very likely**: 2% (Avid Traveler $100K+), 2% (Avid Traveler $150K+), 1% (Long-Distance Air Traveler under 55), 18% (Nat Rep)
- **Not at all likely**: 1% (Avid Traveler $100K+), 1% (Avid Traveler $150K+), 1% (Long-Distance Air Traveler under 55), 39% (Nat Rep)

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

<table>
<thead>
<tr>
<th>Area</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>57%</td>
<td>52%</td>
<td>34%</td>
<td>48%</td>
</tr>
<tr>
<td>Suburb</td>
<td>40%</td>
<td>38%</td>
<td>32%</td>
<td>33%</td>
</tr>
<tr>
<td>Town</td>
<td>6%</td>
<td>5%</td>
<td>6%</td>
<td>14%</td>
</tr>
<tr>
<td>Rural area</td>
<td>6%</td>
<td>5%</td>
<td>5%</td>
<td>18%</td>
</tr>
</tbody>
</table>

Source: HVCB analysis of YouGov data provided by HTA as of February 6, 2022
State of Residence

Source: HVCB analysis of YouGov data provided by HTA as of February 6, 2022
## Top 10 States of Residence by Segment

<table>
<thead>
<tr>
<th>Avid Traveler</th>
<th>Avid Traveler</th>
<th>Avid Traveler</th>
<th>Long-Distance Air Traveler under 55</th>
<th>Nat Rep</th>
</tr>
</thead>
<tbody>
<tr>
<td>$100K, 25-54, individual</td>
<td>$150K, 25-54, 2+ household</td>
<td></td>
<td>California</td>
<td>California</td>
</tr>
<tr>
<td>California</td>
<td>California</td>
<td></td>
<td>26.7%</td>
<td>22.5%</td>
</tr>
<tr>
<td>New York</td>
<td>New York</td>
<td></td>
<td>21.5%</td>
<td>10.1%</td>
</tr>
<tr>
<td>Texas</td>
<td>Texas</td>
<td></td>
<td>10.1%</td>
<td>12.7%</td>
</tr>
<tr>
<td>Florida</td>
<td>Florida</td>
<td></td>
<td>8.6%</td>
<td>7.3%</td>
</tr>
<tr>
<td>Washington</td>
<td>Washington</td>
<td></td>
<td>5.8%</td>
<td>4.4%</td>
</tr>
<tr>
<td>Illinois</td>
<td>Virginia</td>
<td></td>
<td>4.5%</td>
<td>4.3%</td>
</tr>
<tr>
<td>Virginia</td>
<td>Massachusetts</td>
<td></td>
<td>3.3%</td>
<td>4.3%</td>
</tr>
<tr>
<td>New Jersey</td>
<td>Georgia</td>
<td></td>
<td>2.9%</td>
<td>2.8%</td>
</tr>
<tr>
<td>Ohio</td>
<td>New Jersey</td>
<td></td>
<td>2.5%</td>
<td>2.8%</td>
</tr>
<tr>
<td>Pennsylvania</td>
<td>Pennsylvania</td>
<td></td>
<td>2.5%</td>
<td>2.6%</td>
</tr>
</tbody>
</table>

Source: HVCB analysis of YouGov data provided by HTA as of February 6, 2022
Leisure trip – most recent destination

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

Leisure trip within the continental U.S.:
- Avid Traveler $100K+: 30%
- Avid Traveler $150K+: 14%
- Long-Distance Air Traveler under 55: 32%
- Nat Rep: 28%

Alaska:
- Avid Traveler $100K+: 9%
- Avid Traveler $150K+: 8%
- Long-Distance Air Traveler under 55: 10%
- Nat Rep: 10%

Hawaii:
- Avid Traveler $100K+: 9%
- Avid Traveler $150K+: 10%
- Long-Distance Air Traveler under 55: 3%
- Nat Rep: 2%

The Caribbean or West Indies:
- Avid Traveler $100K+: 2%
- Avid Traveler $150K+: 3%
- Long-Distance Air Traveler under 55: 12%
- Nat Rep: 4%

Mexico:
- Avid Traveler $100K+: 4%
- Avid Traveler $150K+: 4%
- Long-Distance Air Traveler under 55: 3%
- Nat Rep: 3%

Canada:
- Avid Traveler $100K+: 7%
- Avid Traveler $150K+: 4%
- Long-Distance Air Traveler under 55: 1%
- Nat Rep: 7%

Europe:
- Avid Traveler $100K+: 13%
- Avid Traveler $150K+: 6%
- Long-Distance Air Traveler under 55: 2%
- Nat Rep: 2%

Asia:
- Avid Traveler $100K+: 13%
- Avid Traveler $150K+: 6%
- Long-Distance Air Traveler under 55: 3%
- Nat Rep: 3%

Oceania (e.g., Australia, New Zealand, etc.):
- Avid Traveler $100K+: 1%
- Avid Traveler $150K+: 1%
- Long-Distance Air Traveler under 55: 1%
- Nat Rep: 1%

Source: HVCB analysis of YouGov data provided by HTA as of February 6, 2022
# 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>37.9%</td>
<td>42.2%</td>
<td>35.6%</td>
<td>23.9%</td>
</tr>
<tr>
<td>Availability of transportation to destination</td>
<td>28.0%</td>
<td>31.3%</td>
<td>35.3%</td>
<td>14.2%</td>
</tr>
<tr>
<td>Culture and historical sites</td>
<td>28.4%</td>
<td>35.0%</td>
<td>28.3%</td>
<td>18.4%</td>
</tr>
<tr>
<td>Overall value for money</td>
<td>37.2%</td>
<td>34.3%</td>
<td>31.8%</td>
<td>30.8%</td>
</tr>
<tr>
<td>Activities/sports</td>
<td>33.2%</td>
<td>35.1%</td>
<td>27.9%</td>
<td>16.2%</td>
</tr>
<tr>
<td>Outstanding natural beauty</td>
<td>39.5%</td>
<td>42.2%</td>
<td>32.5%</td>
<td>24.0%</td>
</tr>
<tr>
<td>Nightlife</td>
<td>15.1%</td>
<td>14.5%</td>
<td>23.5%</td>
<td>8.3%</td>
</tr>
<tr>
<td>Having friends/family in/nearby</td>
<td>30.2%</td>
<td>27.2%</td>
<td>32.0%</td>
<td>24.4%</td>
</tr>
<tr>
<td>Low cost</td>
<td>28.6%</td>
<td>24.2%</td>
<td>34.0%</td>
<td>23.3%</td>
</tr>
<tr>
<td>Been before and really liked it/special memory</td>
<td>23.9%</td>
<td>25.7%</td>
<td>27.1%</td>
<td>18.7%</td>
</tr>
<tr>
<td>Recommended by someone</td>
<td>23.4%</td>
<td>22.9%</td>
<td>27.5%</td>
<td>13.8%</td>
</tr>
<tr>
<td>Other</td>
<td>7.2%</td>
<td>5.5%</td>
<td>5.4%</td>
<td>6.5%</td>
</tr>
<tr>
<td>Don't know</td>
<td>0.3%</td>
<td>0.3%</td>
<td>0.0%</td>
<td>2.1%</td>
</tr>
<tr>
<td>None of these</td>
<td>1.4%</td>
<td>1.1%</td>
<td>0.8%</td>
<td>2.3%</td>
</tr>
<tr>
<td>N/A - Haven't been on vacation recently</td>
<td>1.9%</td>
<td>0.5%</td>
<td>2.9%</td>
<td>24.0%</td>
</tr>
</tbody>
</table>

Source: HVCB analysis of YouGov data provided by HTA as of February 6, 2022
### Reason for choosing most recent leisure destination

<table>
<thead>
<tr>
<th>Factor</th>
<th>Avid Traveler $100K+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall value for money</td>
<td>37.2%</td>
</tr>
<tr>
<td>Temperature/climate</td>
<td>37.9%</td>
</tr>
<tr>
<td>Outstanding natural beauty</td>
<td>39.5%</td>
</tr>
<tr>
<td>Availability of transportation to destination</td>
<td>28.0%</td>
</tr>
<tr>
<td>Activities/sports</td>
<td>33.2%</td>
</tr>
<tr>
<td>Having friends/family in/nearby</td>
<td>30.2%</td>
</tr>
<tr>
<td>Recommended by someone</td>
<td>23.4%</td>
</tr>
<tr>
<td>Culture and historical sites</td>
<td>28.4%</td>
</tr>
<tr>
<td>Been before and really liked it/special memory</td>
<td>23.9%</td>
</tr>
<tr>
<td>Low cost</td>
<td>28.6%</td>
</tr>
<tr>
<td>Nightlife</td>
<td>15.1%</td>
</tr>
<tr>
<td>Other</td>
<td>7.2%</td>
</tr>
<tr>
<td>Don't know</td>
<td>0.3%</td>
</tr>
<tr>
<td>None of these</td>
<td>1.4%</td>
</tr>
<tr>
<td>N/A - Haven’t been on vacation recently</td>
<td>1.9%</td>
</tr>
</tbody>
</table>

Source: HVCB analysis of YouGov data provided by HTA as of February 6, 2022
Reason for choosing most recent leisure destination

- Avid Traveler $150K+

- Availability of transportation to destination: 31.3%
- Temperature/climate: 42.2%
- Culture and historical sites: 35.0%
- Outstanding natural beauty: 42.2%
- Overall value for money: 34.3%
- Activities/sports: 35.1%
- Having friends/family in/nearby: 27.2%
- Recommended by someone: 22.9%
- Been before and really liked it/special…: 25.7%
- Low cost: 24.2%
- Nightlife: 14.5%
- Other: 5.5%
- Don’t know: 0.3%
- None of these: 1.1%
- N/A - Haven’t been on vacation recently: 0.5%

Source: HVCB analysis of YouGov data provided by HTA as of February 6, 2022
Reason for choosing most recent leisure destination

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Temperature/climate</td>
<td>35.6%</td>
</tr>
<tr>
<td>Having friends/family in/nearby</td>
<td>32.0%</td>
</tr>
<tr>
<td>Overall value for money</td>
<td>31.8%</td>
</tr>
<tr>
<td>Activities/sports</td>
<td>27.9%</td>
</tr>
<tr>
<td>Culture and historical sites</td>
<td>28.3%</td>
</tr>
<tr>
<td>Availability of transportation to destination</td>
<td>35.3%</td>
</tr>
<tr>
<td>Nightlife</td>
<td>23.5%</td>
</tr>
<tr>
<td>Low cost</td>
<td>34.0%</td>
</tr>
<tr>
<td>Outstanding natural beauty</td>
<td>32.5%</td>
</tr>
<tr>
<td>Been before and really liked it/special...</td>
<td>27.1%</td>
</tr>
<tr>
<td>Recommended by someone</td>
<td>27.5%</td>
</tr>
<tr>
<td>Other</td>
<td>5.4%</td>
</tr>
<tr>
<td>Don't know</td>
<td>5.4%</td>
</tr>
<tr>
<td>None of these</td>
<td>0.8%</td>
</tr>
<tr>
<td>N/A - Haven't been on vacation recently</td>
<td>2.9%</td>
</tr>
</tbody>
</table>

Source: HVCB analysis of YouGov data provided by HTA as of February 6, 2022
Reason for choosing most recent leisure destination

- Overall value for money: 30.8%
- Outstanding natural beauty: 24.0%
- Temperature/climate: 23.9%
- Having friends/family in/nearby: 24.4%
- Low cost: 23.3%
- Been before and really liked it/special memory: 18.7%
- Culture and historical sites: 18.4%
- Activities/sports: 16.2%
- Availability of transportation to destination: 14.2%
- Recommended by someone: 13.8%
- Nightlife: 8.3%
- Other: 6.5%
- Don't know: 2.1%
- None of these: 2.3%
- N/A - Haven't been on vacation recently: 24.0%

Source: HVCB analysis of YouGov data provided by HTA as of February 6, 2022
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 February 6, 2022
Most recent leisure trip - total spend

- 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 February 6, 2022
Leisure trip - next destination

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

Leisure trip within the continental U.S.
Alaska
Hawai’i
The Caribbean or West Indies
Mexico
Canada
Europe
Asia
Oceania (e.g., Australia, New Zealand, etc.)
Don't know

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

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

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

- Stayed in a hotel or motel: 56% Avid Traveler $100K+, 56% Avid Traveler $150K+, 59% Long-Distance Air Traveler under 55, 32% Nat Rep
- Stayed in short-term/vacation rental: 29% Avid Traveler $100K+, 30% Avid Traveler $150K+, 27% Long-Distance Air Traveler under 55, 11% Nat Rep
- Taken a cruise: 10% Avid Traveler $100K+, 30% Avid Traveler $150K+, 13% Long-Distance Air Traveler under 55, 3% Nat Rep
- Traveled by air: 52% Avid Traveler $100K+, 48% Avid Traveler $150K+, 96% Long-Distance Air Traveler under 55, 17% Nat Rep
- Traveled using a package deal: 13% Avid Traveler $100K+, 12% Avid Traveler $150K+, 4% Long-Distance Air Traveler under 55, 4% Nat Rep
- Rented a car: 32% Avid Traveler $100K+, 30% Avid Traveler $150K+, 31% Long-Distance Air Traveler under 55, 13% Nat Rep
- Used online rideshare services: 32% Avid Traveler $100K+, 33% Avid Traveler $150K+, 34% Long-Distance Air Traveler under 55, 12% Nat Rep
- Visited a travel destination (e.g. museums, resorts, etc.): 39% Avid Traveler $100K+, 41% Avid Traveler $150K+, 42% Long-Distance Air Traveler under 55, 20% Nat Rep

Source: HVCB analysis of YouGov data provided by HTA as of February 6, 2022
Travel Mindset

- I like to come back from vacation having learnt something new
  - Avid Traveler $100K+: 79%
  - Avid Traveler $150K+: 79%
  - Long-Distance Air Traveler under 55: 68%
  - Nat Rep: 79%

- When I go on vacation, I like to go off the beaten track
  - Avid Traveler $100K+: 72%
  - Avid Traveler $150K+: 72%
  - Long-Distance Air Traveler under 55: 53%
  - Nat Rep: 73%

- You can only ever get to know a country by experiencing its culture
  - Avid Traveler $100K+: 88%
  - Avid Traveler $150K+: 90%
  - Long-Distance Air Traveler under 55: 75%
  - Nat Rep: 85%

- I am passionate about traveling
  - Avid Traveler $100K+: 84%
  - Avid Traveler $150K+: 86%
  - Long-Distance Air Traveler under 55: 51%
  - Nat Rep: 85%

Source: HVCB analysis of YouGov data provided by HTA as of February 6, 2022
Travel Activities

- I like to spend my leisure time relaxing
  - Avid Traveler $100K+: 84%
  - Avid Traveler $150K+: 84%
  - Long-Distance Air Traveler under 55: 86%
  - Nat Rep: 82%

- I tend to spend my leisure time on hobbies and activities
  - Avid Traveler $100K+: 82%
  - Avid Traveler $150K+: 82%
  - Long-Distance Air Traveler under 55: 80%
  - Nat Rep: 73%

- When I go on vacation I only want to eat, drink and lie in the sun
  - Avid Traveler $100K+: 59%
  - Avid Traveler $150K+: 57%
  - Long-Distance Air Traveler under 55: 59%
  - Nat Rep: 44%

Source: HVCB analysis of YouGov data provided by HTA as of February 6, 2022
I usually wait for last minute deals rather than planning my vacations in advance

- Avid Traveler $100K+: 44%
- Avid Traveler $150K+: 42%
- Long-Distance Air Traveler under 55: 53%
- Nat Rep: 33%

I tend to book my vacations outside of school vacations/breaks

- Avid Traveler $100K+: 64%
- Avid Traveler $150K+: 65%
- Long-Distance Air Traveler under 55: 69%
- Nat Rep: 38%

I usually go back to the same places on vacation

- Avid Traveler $100K+: 54%
- Avid Traveler $150K+: 54%
- Long-Distance Air Traveler under 55: 54%
- Nat Rep: 47%

When I’m planning my next vacation, I have at least one destination in mind or already selected

- Avid Traveler $100K+: 87%
- Avid Traveler $150K+: 88%
- Long-Distance Air Traveler under 55: 69%
- Nat Rep: 84%

Source: HVCB analysis of YouGov data provided by HTA as of February 6, 2022
Booking & Spending Attitudes

- I would never think of taking a package holiday/vacations:
  - Avid Traveler $100K+: 40%
  - Avid Traveler $150K+: 44%
  - Long-Distance Air Traveler under 55: 51%
  - Nat Rep: 32%

- I try to keep to a strict budget when I go on vacation:
  - Avid Traveler $100K+: 53%
  - Avid Traveler $150K+: 45%
  - Long-Distance Air Traveler under 55: 63%
  - Nat Rep: 53%

- I am excited to generally spend more when traveling:
  - Avid Traveler $100K+: 66%
  - Avid Traveler $150K+: 65%
  - Long-Distance Air Traveler under 55: 68%
  - Nat Rep: 47%

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