COVID-19 Impact on U.S. Avid Travelers

An HVCB analysis of YouGov data provided by HTA as of May 8, 2022
Reported on May 19, 2022
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

Source: HVCA analysis of YouGov data provided by HTA as of May 8, 2022
Level of comfort visiting an airport right now

Source: HVCB analysis of YouGov data provided by HTA as of May 8, 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 May 8, 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 May 8, 2022
Future Travel – Likelihood of booking a flight in the next 12 months

Source: HVCB analysis of YouGov data provided by HTA as of May 8, 2022
Traveler Profiles
Avid Travelers vs. Long-Distance Air Travelers vs. Nat. Rep.
State of Residence

Source: HVCB analysis of YouGov data provided by HTA as of May 8, 2022
# Top 10 States of Residence by Segment

## Avid Traveler
- **$100K, 25-54, individual**
  - California: 21.8%
  - New York: 9.6%
  - Texas: 7.3%
  - Florida: 5.8%
  - Illinois: 4.0%
  - Washington: 4.0%
  - Virginia: 3.3%
  - New Jersey: 3.1%
  - Ohio: 2.7%
  - Pennsylvania: 2.5%

## Avid Traveler
- **$150K, 25-54, 2+ household**
  - California: 27.1%
  - New York: 11.3%
  - Texas: 5.9%
  - Washington: 4.7%
  - Florida: 4.7%
  - Georgia: 3.3%
  - New Jersey: 3.1%
  - Virginia: 3.1%
  - Illinois: 3.0%
  - Pennsylvania: 2.7%

## Long-Distance Air Traveler under 55
- California: 18.5%
- New York: 15.7%
- Texas: 11.7%
- Florida: 6.8%
- Georgia: 5.3%
- New Jersey: 3.2%
- Virginia: 2.9%
- North Carolina: 2.5%
- Washington: 2.4%
- Oregon: 2.1%

## Nat Rep
- California: 9.9%
- Texas: 8.9%
- Florida: 7.1%
- New York: 6.9%
- Pennsylvania: 4.2%
- Ohio: 3.9%
- Illinois: 3.6%
- Georgia: 3.0%
- Michigan: 2.8%
- Arizona: 2.8%

Source: HVCB analysis of YouGov data provided by HTA as of May 8, 2022
Leisure trip – most recent destination

Source: HVCB analysis of YouGov data provided by HTA as of May 8, 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>37.8%</td>
<td>43.3%</td>
<td>35.4%</td>
<td>24.0%</td>
</tr>
<tr>
<td>Availability of transportation to destination</td>
<td>26.6%</td>
<td>26.1%</td>
<td>30.8%</td>
<td>14.8%</td>
</tr>
<tr>
<td>Culture and historical sites</td>
<td>28.5%</td>
<td>31.6%</td>
<td>34.9%</td>
<td>18.5%</td>
</tr>
<tr>
<td>Overall value for money</td>
<td>36.2%</td>
<td>34.0%</td>
<td>32.3%</td>
<td>31.3%</td>
</tr>
<tr>
<td>Activities/sports</td>
<td>30.2%</td>
<td>33.6%</td>
<td>34.7%</td>
<td>16.9%</td>
</tr>
<tr>
<td>Outstanding natural beauty</td>
<td>38.5%</td>
<td>41.4%</td>
<td>33.8%</td>
<td>24.3%</td>
</tr>
<tr>
<td>Nightlife</td>
<td>16.0%</td>
<td>18.5%</td>
<td>29.0%</td>
<td>8.7%</td>
</tr>
<tr>
<td>Having friends/family in/nearby</td>
<td>31.9%</td>
<td>30.5%</td>
<td>36.2%</td>
<td>24.8%</td>
</tr>
<tr>
<td>Low cost</td>
<td>25.6%</td>
<td>24.9%</td>
<td>28.9%</td>
<td>24.0%</td>
</tr>
<tr>
<td>Been before and really liked it/special memory</td>
<td>25.5%</td>
<td>30.6%</td>
<td>23.9%</td>
<td>19.4%</td>
</tr>
<tr>
<td>Recommended by someone</td>
<td>19.7%</td>
<td>20.6%</td>
<td>35.0%</td>
<td>14.5%</td>
</tr>
<tr>
<td>Other</td>
<td>6.7%</td>
<td>6.3%</td>
<td>5.0%</td>
<td>6.4%</td>
</tr>
<tr>
<td>Don't know</td>
<td>0.4%</td>
<td>0.3%</td>
<td>1.9%</td>
<td>2.0%</td>
</tr>
<tr>
<td>None of these</td>
<td>1.4%</td>
<td>0.8%</td>
<td>0.3%</td>
<td>2.3%</td>
</tr>
<tr>
<td>N/A - Haven't been on vacation recently</td>
<td>2.5%</td>
<td>1.2%</td>
<td>3.3%</td>
<td>23.6%</td>
</tr>
</tbody>
</table>

Source: HVCB analysis of YouGov data provided by HTA as of May 8, 2022
Reason for choosing most recent leisure destination

- Avid Traveler $100K+

Overall value for money: 36.0%
Temperature/climate: 38.0%
Outstanding natural beauty: 39.0%
Availability of transportation to destination: 27.0%
Activities/sports: 30.0%
Having friends/family in/nearby: 32.0%
Recommended by someone: 20.0%
Culture and historical sites: 28.0%
Been before and really liked it/special memory: 26.0%
Low cost: 26.0%
Nightlife: 16.0%
Other: 7.0%
Don’t know: 0.0%
None of these: 1.0%
N/A - Haven’t been on vacation recently: 2.0%

Source: HVCB analysis of YouGov data provided by HTA as of May 8, 2022
### Reason for choosing most recent leisure destination

<table>
<thead>
<tr>
<th>Reason</th>
<th>Avid Traveler $150K+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Availability of transportation to destination</td>
<td>26.0%</td>
</tr>
<tr>
<td>Temperature/climate</td>
<td>43.0%</td>
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<tr>
<td>Nightlife</td>
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## Reason for choosing most recent leisure destination

**Long-Distance Avid Traveler under 55**

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<tr>
<td>Other</td>
<td>5.0%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>2.0%</td>
</tr>
<tr>
<td>None of these</td>
<td>3.0%</td>
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## Reason for choosing most recent leisure destination

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Source: HVCB analysis of YouGov data provided by HTA as of May 8, 2022
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

Source: HVCB analysis of YouGov data provided by HTA as of May 8, 2022
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 May 8, 2022

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

- Stayed in a hotel or motel: 59% Avid Traveler $100K+, 35% Avid Traveler $150K+, 32% 13%
- Stayed in short-term/ vacation rental: 58% Avid Traveler $100K+, 33% Avid Traveler $150K+, 31% 14%
- Taken a cruise: 5% Avid Traveler $100K+, 14% Avid Traveler $150K+, 11% 3%
- Traveled by air: 57% Avid Traveler $100K+, 57% Avid Traveler $150K+, 20%
- Traveled using a package deal: 31% Avid Traveler $100K+, 31% Avid Traveler $150K+, 15% 20%
- Rented a car: 36% Avid Traveler $100K+, 36% Avid Traveler $150K+, 36% 15%
- Used online rideshare services: 41% Avid Traveler $100K+, 41% Avid Traveler $150K+, 38% 13%
- Visited a travel destination (e.g. museums, resorts, etc.): 49% Avid Traveler $100K+, 50% Avid Traveler $150K+, 49% 23%

Source: HVCB analysis of YouGov data provided by HTA as of May 8, 2022
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

Source: HVCB analysis of YouGov data provided by HTA as of May 8, 2022
Travel Activities

- **I like to spend my leisure time relaxing**
  - Avid Traveler $100K+: 85%
  - Avid Traveler $150K+: 84%
  - Long-Distance Air Traveler under 55: 85%
  - Nat Rep: 82%

- **I tend to spend my leisure time on hobbies and activities**
  - Avid Traveler $100K+: 81%
  - Avid Traveler $150K+: 78%
  - Long-Distance Air Traveler under 55: 82%
  - Nat Rep: 73%

- **When I go on vacation I only want to eat, drink and lie in the sun**
  - Avid Traveler $100K+: 57%
  - Avid Traveler $150K+: 55%
  - Long-Distance Air Traveler under 55: 57%
  - Nat Rep: 45%

Source: HVCB analysis of YouGov data provided by HTA as of May 8, 2022
Booking & Spending Attitudes

I usually wait for last minute deals rather than planning my vacations in advance

- Avid Traveler $100K+: 40%
- Avid Traveler $150K+: 36%
- Long-Distance Air Traveler under 55: 49%
- Nat Rep: 34%

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

- Avid Traveler $100K+: 62%
- Avid Traveler $150K+: 61%
- Long-Distance Air Traveler under 55: 62%
- Nat Rep: 39%

I usually go back to the same places on vacation

- Avid Traveler $100K+: 52%
- Avid Traveler $150K+: 51%
- Long-Distance Air Traveler under 55: 55%
- Nat Rep: 48%

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

- Avid Traveler $100K+: 86%
- Avid Traveler $150K+: 84%
- Long-Distance Air Traveler under 55: 79%
- Nat Rep: 70%

Source: HVCB analysis of YouGov data provided by HTA as of May 8, 2022
Booking & Spending Attitudes

- **I would never think of taking a package holiday/vacations**
  - Avid Traveler $100K+: 41%
  - Avid Traveler $150K+: 37%
  - Long-Distance Air Traveler under 55: 43%
  - Nat Rep: 33%

- **I try to keep to a strict budget when I go on vacation**
  - Avid Traveler $100K+: 49%
  - Avid Traveler $150K+: 43%
  - Long-Distance Air Traveler under 55: 53%
  - Nat Rep: 64%

- **I am excited to generally spend more when traveling**
  - Avid Traveler $100K+: 66%
  - Avid Traveler $150K+: 69%
  - Long-Distance Air Traveler under 55: 65%
  - Nat Rep: 48%

Source: HVCB analysis of YouGov data provided by HTA as of May 8, 2022