COVID-19 Impact on U.S. Avid Travelers

An HVCB analysis of YouGov data provided by HTA as of August 14, 2022
Reported on August 15, 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?

- 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 August 14, 2022
Level of comfort visiting an airport right now

Source: HVCB analysis of YouGov data provided by HTA as of August 14, 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 August 14, 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 August 14, 2022
Future Travel – Likelihood of booking a flight in the next 12 months

- Very likely:
  - Avid Traveler $100K+: 67%
  - Avid Traveler $150K+: 71%
  - Long-Distance Air Traveler under 55: 20%
  - Nat Rep: 27%

- Likely:
  - Avid Traveler $100K+: 27%
  - Avid Traveler $150K+: 24%
  - Long-Distance Air Traveler under 55: 22%
  - Nat Rep: 10%

- Somewhat likely:
  - Avid Traveler $100K+: 4%
  - Avid Traveler $150K+: 4%
  - Long-Distance Air Traveler under 55: 36%
  - Nat Rep: 15%

- Not very likely:
  - Avid Traveler $100K+: 1%
  - Avid Traveler $150K+: 1%
  - Long-Distance Air Traveler under 55: 3%
  - Nat Rep: 17%

- Not at all likely:
  - Avid Traveler $100K+: 1%
  - Avid Traveler $150K+: 1%
  - Long-Distance Air Traveler under 55: 3%
  - Nat Rep: 1%

Source: HVCB analysis of YouGov data provided by HTA as of August 14, 2022
Traveler Profiles
Avid Travelers vs. Long-Distance Air Travelers vs. Nat. Rep.
Type of Area Living In

Source: Hawaii Visitors & Convention Bureau analysis of YouGov data provided by HTA as of August 14, 2022
State of Residence

Source: HVCB analysis of YouGov data provided by HTA as of August 14, 2022
## Top 10 States of Residence by Segment

<table>
<thead>
<tr>
<th>Segment</th>
<th>State</th>
<th>Rank</th>
<th>Segment</th>
<th>State</th>
<th>Rank</th>
<th>Segment</th>
<th>State</th>
<th>Rank</th>
<th>Segment</th>
<th>State</th>
<th>Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>$100K, 25-54, individual</td>
<td>California</td>
<td>9.8%</td>
<td>Avid Traveler</td>
<td>California</td>
<td>25.2%</td>
<td>Long-Distance Air Traveler under 55</td>
<td>California</td>
<td>19.7%</td>
<td>Nat Rep</td>
<td>California</td>
<td>9.8%</td>
</tr>
<tr>
<td>New York</td>
<td>7.1%</td>
<td></td>
<td>New York</td>
<td>13.5%</td>
<td></td>
<td>New York</td>
<td>15.8%</td>
<td></td>
<td>Texas</td>
<td>8.8%</td>
<td></td>
</tr>
<tr>
<td>Texas</td>
<td>8.8%</td>
<td></td>
<td>Texas</td>
<td>7.5%</td>
<td></td>
<td>Texas</td>
<td>10.9%</td>
<td></td>
<td>Florida</td>
<td>7.2%</td>
<td></td>
</tr>
<tr>
<td>Florida</td>
<td>7.2%</td>
<td></td>
<td>Florida</td>
<td>5.5%</td>
<td></td>
<td>Florida</td>
<td>6.5%</td>
<td></td>
<td>New York</td>
<td>7.1%</td>
<td></td>
</tr>
<tr>
<td>Washington</td>
<td>2.5%</td>
<td></td>
<td>Georgia</td>
<td>4.2%</td>
<td></td>
<td>New Jersey</td>
<td>5.2%</td>
<td></td>
<td>Pennsylvania</td>
<td>4.3%</td>
<td></td>
</tr>
<tr>
<td>Illinois</td>
<td>3.6%</td>
<td></td>
<td>Washington</td>
<td>3.8%</td>
<td></td>
<td>Washington</td>
<td>4.3%</td>
<td></td>
<td>Ohio</td>
<td>3.9%</td>
<td></td>
</tr>
<tr>
<td>New Jersey</td>
<td>2.4%</td>
<td></td>
<td>New Jersey</td>
<td>3.1%</td>
<td></td>
<td>Georgia</td>
<td>3.8%</td>
<td></td>
<td>Illinois</td>
<td>3.6%</td>
<td></td>
</tr>
<tr>
<td>Ohio</td>
<td>3.9%</td>
<td></td>
<td>Illinois</td>
<td>3.1%</td>
<td></td>
<td>Illinois</td>
<td>2.8%</td>
<td></td>
<td>Georgia</td>
<td>3.1%</td>
<td></td>
</tr>
<tr>
<td>Georgia</td>
<td>3.1%</td>
<td></td>
<td>Pennsylvania</td>
<td>3.0%</td>
<td></td>
<td>Pennsylvania</td>
<td>2.4%</td>
<td></td>
<td>Arizona</td>
<td>2.8%</td>
<td></td>
</tr>
<tr>
<td>Oregon</td>
<td>1.6%</td>
<td></td>
<td>Virginia</td>
<td>2.8%</td>
<td></td>
<td>Ohio</td>
<td>2.3%</td>
<td></td>
<td>Michigan</td>
<td>2.8%</td>
<td></td>
</tr>
</tbody>
</table>

Source: HVCB analysis of YouGov data provided by HTA as of August 14, 2022
Leisure trip – most recent destination

- **Leisure trip within the continental U.S.**
  - **Avid Traveler $100K+**: 31%
  - **Avid Traveler $150K+**: 31%
  - **Long-Distance Air Traveler under 55**: 34%
  - **Nat Rep**: 19%

- **Alaska**
  - **Avid Traveler $100K+**: 8%
  - **Avid Traveler $150K+**: 9%
  - **Long-Distance Air Traveler under 55**: 3%
  - **Nat Rep**: 1%

- **Hawai’i**
  - **Avid Traveler $100K+**: 29%
  - **Avid Traveler $150K+**: 30%
  - **Long-Distance Air Traveler under 55**: 8%
  - **Nat Rep**: 3%

- **The Caribbean or West Indies**
  - **Avid Traveler $100K+**: 4%
  - **Avid Traveler $150K+**: 5%
  - **Long-Distance Air Traveler under 55**: 5%
  - **Nat Rep**: 3%

- **Mexico**
  - **Avid Traveler $100K+**: 5%
  - **Avid Traveler $150K+**: 3%
  - **Long-Distance Air Traveler under 55**: 13%
  - **Nat Rep**: 3%

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

- **Europe**
  - **Avid Traveler $100K+**: 6%
  - **Avid Traveler $150K+**: 6%
  - **Long-Distance Air Traveler under 55**: 16%
  - **Nat Rep**: 3%

- **Asia**
  - **Avid Traveler $100K+**: 2%
  - **Avid Traveler $150K+**: 2%
  - **Long-Distance Air Traveler under 55**: 2%
  - **Nat Rep**: 1%

- **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 August 14, 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>36.1%</td>
<td>37.2%</td>
<td>37.4%</td>
<td>23.3%</td>
</tr>
<tr>
<td>Availability of transportation to destination</td>
<td>25.5%</td>
<td>23.1%</td>
<td>31.6%</td>
<td>14.5%</td>
</tr>
<tr>
<td>Culture and historical sites</td>
<td>29.7%</td>
<td>33.7%</td>
<td>38.9%</td>
<td>17.8%</td>
</tr>
<tr>
<td>Overall value for money</td>
<td>35.5%</td>
<td>29.8%</td>
<td>38.6%</td>
<td>30.1%</td>
</tr>
<tr>
<td>Activities/sports</td>
<td>30.9%</td>
<td>31.8%</td>
<td>32.6%</td>
<td>17.0%</td>
</tr>
<tr>
<td>Outstanding natural beauty</td>
<td>37.5%</td>
<td>39.8%</td>
<td>41.3%</td>
<td>23.8%</td>
</tr>
<tr>
<td>Nightlife</td>
<td>20.4%</td>
<td>18.2%</td>
<td>20.2%</td>
<td>9.0%</td>
</tr>
<tr>
<td>Having friends/family in/nearby</td>
<td>33.6%</td>
<td>30.6%</td>
<td>45.4%</td>
<td>25.6%</td>
</tr>
<tr>
<td>Low cost</td>
<td>27.4%</td>
<td>22.7%</td>
<td>35.9%</td>
<td>23.7%</td>
</tr>
<tr>
<td>Been before and really liked it/special memory</td>
<td>27.7%</td>
<td>28.9%</td>
<td>32.2%</td>
<td>19.2%</td>
</tr>
<tr>
<td>Recommended by someone</td>
<td>21.5%</td>
<td>17.1%</td>
<td>37.2%</td>
<td>14.3%</td>
</tr>
<tr>
<td>Other</td>
<td>6.7%</td>
<td>10.1%</td>
<td>9.2%</td>
<td>6.4%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>0.2%</td>
<td>0.3%</td>
<td>2.3%</td>
<td>1.9%</td>
</tr>
<tr>
<td>None of these</td>
<td>1.0%</td>
<td>0.8%</td>
<td>1.6%</td>
<td>2.6%</td>
</tr>
<tr>
<td>N/A - Haven't been on vacation recently</td>
<td>1.4%</td>
<td>1.6%</td>
<td>2.6%</td>
<td>23.1%</td>
</tr>
</tbody>
</table>

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Reason for choosing most recent leisure destination

<table>
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<tr>
<th>Reason</th>
<th>Avid Traveler $100K+</th>
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<tr>
<td>Outstanding natural beauty</td>
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<td>Recommended by someone</td>
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<tr>
<td>Nightlife</td>
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</tr>
<tr>
<td>Other</td>
<td>6.7%</td>
</tr>
<tr>
<td>N/A - Haven't been on vacation recently</td>
<td>1.4%</td>
</tr>
<tr>
<td>None of these</td>
<td>1.0%</td>
</tr>
<tr>
<td>Don't know</td>
<td>0.2%</td>
</tr>
</tbody>
</table>

Source: HVCB analysis of YouGov data provided by HTA as of August 14, 2022
Reason for choosing most recent leisure destination

- Outstanding natural beauty: 39.8%
- The temperature/climate: 37.2%
- Culture and historical sites: 33.7%
- Activities/sports: 31.8%
- Having friends/family in/nearby: 30.6%
- Overall value for money: 29.8%
- Been before and really liked it/special place: 28.9%
- Availability of transportation to destination: 23.1%
- Low cost: 22.7%
- Nightlife: 18.2%
- Recommended by someone: 17.1%
- Other: 10.1%
- N/A - Haven't been on vacation recently: 1.6%
- None of these: 0.8%
- Don't know: 0.3%

Source: HVCB analysis of YouGov data provided by HTA as of August 14, 2022
### Reason for choosing most recent leisure destination

*Long Distance Air Traveler under 55*

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Having friends/family in/nearby</td>
<td>45.4%</td>
</tr>
<tr>
<td>Outstanding natural beauty</td>
<td>41.3%</td>
</tr>
<tr>
<td>Culture and historical sites</td>
<td>38.9%</td>
</tr>
<tr>
<td>Overall value for money</td>
<td>38.6%</td>
</tr>
<tr>
<td>The temperature/climate</td>
<td>37.4%</td>
</tr>
<tr>
<td>Recommended by someone</td>
<td>37.2%</td>
</tr>
<tr>
<td>Low cost</td>
<td>35.9%</td>
</tr>
<tr>
<td>Activities/sports</td>
<td>32.6%</td>
</tr>
<tr>
<td>Been before and really liked it/special...</td>
<td>32.2%</td>
</tr>
<tr>
<td>Availability of transportation to destination</td>
<td>31.6%</td>
</tr>
<tr>
<td>Nightlife</td>
<td>20.2%</td>
</tr>
<tr>
<td>Other</td>
<td>9.2%</td>
</tr>
<tr>
<td>N/A - Haven’t been on vacation recently</td>
<td>2.6%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>2.3%</td>
</tr>
<tr>
<td>None of these</td>
<td>1.6%</td>
</tr>
</tbody>
</table>

Source: HVCB analysis of YouGov data provided by HTA as of August 14, 2022
Reason for choosing most recent leisure destination

- Overall value for money: 30.1%
- Having friends/family in/nearby: 25.6%
- Outstanding natural beauty: 23.8%
- Low cost: 23.7%
- The temperature/climate: 23.3%
- N/A - Haven’t been on vacation recently: 23.1%
- Been before and really liked it/special memory: 19.2%
- Culture and historical sites: 17.8%
- Activities/sports: 17.0%
- Availability of transportation to destination: 14.5%
- Recommended by someone: 14.3%
- Nightlife: 9.0%
- Other: 6.4%
- None of these: 2.6%
- Don’t know: 1.9%

Source: HVCB analysis of YouGov data provided by HTA as of August 14, 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 August 14, 2022.
Most recent leisure trip - total spend

Source: HVCB analysis of YouGov data provided by HTA as of August 14, 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 August 14, 2022*
Leisure trip - activities in last 12 months

- Stayed in a hotel or motel: 61% Avid Traveler $100K+, 61% Avid Traveler $150K+, 61% Nat Rep
- Stayed in short-term/vacation rental: 37% Avid Traveler $100K+, 32% Avid Traveler $150K+, 33% Nat Rep
- Taken a cruise: 13% Avid Traveler $100K+, 13% Avid Traveler $150K+, 13% Nat Rep
- Traveled by air: 60% Avid Traveler $100K+, 58% Avid Traveler $150K+, 98% Nat Rep
- Traveled using a package deal: 23% Avid Traveler $100K+, 18% Avid Traveler $150K+, 18% Nat Rep
- Rented a car: 5% Avid Traveler $100K+, 18% Avid Traveler $150K+, 5% Nat Rep
- Used online rideshare services: 36% Avid Traveler $100K+, 38% Avid Traveler $150K+, 38% Nat Rep
- Visited a travel destination (e.g., museums, resorts, etc.): 47% Avid Traveler $100K+, 47% Avid Traveler $150K+, 55% Nat Rep

Source: HVCB analysis of YouGov data provided by HTA as of August 14, 2022
Travel Mindset

- I am passionate about traveling:
  - Avid Traveler $100K+: 77%
  - Avid Traveler $150K+: 76%
  - Long-Distance Air Traveler under 55: 68%
  - Nat Rep: 68%

- You can only ever get to know a country by experiencing its culture:
  - Avid Traveler $100K+: 86%
  - Avid Traveler $150K+: 90%
  - Long-Distance Air Traveler under 55: 85%
  - Nat Rep: 75%

- When I go on vacation, I like to go off the beaten track:
  - Avid Traveler $100K+: 69%
  - Avid Traveler $150K+: 70%
  - Long-Distance Air Traveler under 55: 54%
  - Nat Rep: 64%

Source: HVCB analysis of YouGov data provided by HTA as of August 14, 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: 80%
  - Nat Rep: 82%

- I tend to spend my leisure time on hobbies and activities:
  - Avid Traveler $100K+: 84%
  - Avid Traveler $150K+: 84%
  - 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+: 55%
  - Avid Traveler $150K+: 55%
  - Long-Distance Air Traveler under 55: 51%
  - Nat Rep: 46%

Source: HVCB analysis of YouGov data provided by HTA as of August 14, 2022
When I’m planning my next vacation, I have at least one destination in mind or already selected

Source: HVCB analysis of YouGov data provided by HTA as of August 14, 2022
I am excited to generally spend more when traveling

I try to keep to a strict budget when I go on vacation

I would never think of taking a package holiday/vacations

Source: HVCB analysis of YouGov data provided by HTA as of August 14, 2022