COVID-19 Impact on U.S. Avid Travelers

An HVCB analysis of YouGov data provided by HTA as of September 4, 2022
Reported on September 15, 2022

YouGov  Hawaii Tourism Authority  Hawaii Visitors & Convention Bureau™
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: HVCB analysis of YouGov data provided by HTA as of September 4, 2022
Level of comfort visiting an airport right now

- Very comfortable
- Fairly comfortable
- Fairly uncomfortable
- Very uncomfortable
- Not applicable – This isn’t a place I would ever visit
- Don’t know

Source: HVCB analysis of YouGov data provided by HTA as of September 4, 2022
Future Travel Plans
Future Travel – Expected change to air travel in the next 12 months

Source: HVCC analysis of YouGov data provided by HTA as of September 4, 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 September 4, 2022
Future Travel – Likelihood of booking a flight in the next 12 months

- **Very likely**: 68% (Nat Rep), 71% (Avid Traveler $100K+), 20% (Avid Traveler $150K+), 26% (Long-Distance Air Traveler under 55)
- **Likely**: 60% (Nat Rep), 23% (Avid Traveler $100K+), 23% (Avid Traveler $150K+), 10% (Long-Distance Air Traveler under 55)
- **Somewhat likely**: 4% (Nat Rep), 4% (Avid Traveler $100K+), 12% (Avid Traveler $150K+), 16% (Long-Distance Air Traveler under 55)
- **Not very likely**: 3% (Nat Rep), 3% (Avid Traveler $100K+), 1% (Avid Traveler $150K+), 3% (Long-Distance Air Traveler under 55)
- **Not at all likely**: 3% (Nat Rep), 2% (Avid Traveler $100K+), 1% (Avid Traveler $150K+), 3% (Long-Distance Air Traveler under 55)

Source: HVCB analysis of YouGov data provided by HTA as of September 4, 2022
Traveler Profiles
Avid Travelers vs. Long-Distance Air Travelers vs. Nat. Rep.
Type of Area Living In

- City: 46% Avid Traveler $100K+, 50% Avid Traveler $150K+, 55% Nat Rep
- Suburb: 36% Avid Traveler $100K+, 37% Avid Traveler $150K+, 34% Nat Rep
- Town: 6% Avid Traveler $100K+, 5% Avid Traveler $150K+, 7% Nat Rep
- Rural area: 7% Avid Traveler $100K+, 7% Avid Traveler $150K+, 3% Nat Rep

Source: HVCB analysis of YouGov data provided by HTA as of September 4, 2022
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 September 4, 2022
## Top 10 States of Residence by Segment

<table>
<thead>
<tr>
<th>Segment Description</th>
<th>State</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Avid Traveler $100K, 25-54, individual</td>
<td>California</td>
<td>20.8%</td>
</tr>
<tr>
<td></td>
<td>New York</td>
<td>11.6%</td>
</tr>
<tr>
<td></td>
<td>Texas</td>
<td>8.3%</td>
</tr>
<tr>
<td></td>
<td>Florida</td>
<td>6.7%</td>
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<tr>
<td></td>
<td>Illinois</td>
<td>4.2%</td>
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<tr>
<td></td>
<td>Washington</td>
<td>3.9%</td>
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<tr>
<td></td>
<td>New Jersey</td>
<td>3.6%</td>
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<tr>
<td></td>
<td>Ohio</td>
<td>3.3%</td>
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<tr>
<td></td>
<td>Georgia</td>
<td>2.9%</td>
</tr>
<tr>
<td></td>
<td>Pennsylvania</td>
<td>2.5%</td>
</tr>
<tr>
<td>Avid Traveler $150K, 25-54, 2+ household</td>
<td>California</td>
<td>24.7%</td>
</tr>
<tr>
<td></td>
<td>New York</td>
<td>13.1%</td>
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<tr>
<td></td>
<td>Texas</td>
<td>8.7%</td>
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<tr>
<td></td>
<td>Florida</td>
<td>5.6%</td>
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<tr>
<td></td>
<td>Illinois</td>
<td>4.0%</td>
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<tr>
<td></td>
<td>New Jersey</td>
<td>3.0%</td>
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<tr>
<td></td>
<td>Virginia</td>
<td>2.6%</td>
</tr>
<tr>
<td>Long-Distance Air Traveler under 55</td>
<td>California</td>
<td>17.8%</td>
</tr>
<tr>
<td></td>
<td>New York</td>
<td>15.3%</td>
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<tr>
<td></td>
<td>Texas</td>
<td>12.2%</td>
</tr>
<tr>
<td></td>
<td>Florida</td>
<td>7.4%</td>
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<tr>
<td></td>
<td>New Jersey</td>
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<td>Michigan</td>
<td>2.3%</td>
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<td></td>
<td>Pennsylvania</td>
<td>2.3%</td>
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<tr>
<td>Nat Rep</td>
<td>California</td>
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<tr>
<td></td>
<td>Georgia</td>
<td>3.1%</td>
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<tr>
<td></td>
<td>Arizona</td>
<td>2.9%</td>
</tr>
<tr>
<td></td>
<td>Michigan</td>
<td>2.7%</td>
</tr>
</tbody>
</table>

Source: HVCB analysis of YouGov data provided by HTA as of September 4, 2022
Leisure trip – most recent destination

Leisure trip within the continental U.S. 30% 30%
Alaska 9% 9%
Hawai‘i 31% 32%
The Caribbean or West Indies 4% 6% 7%
Mexico 5% 3% 3%
Canada 3% 3% 2%
Europe 6% 6%
Asia 4%
Oceania (e.g., Australia, New Zealand, etc.) 3%

Source: HVCB analysis of YouGov data provided by HTA as of September 4, 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>

Source: HVCB analysis of YouGov data provided by HTA as of September 4, 2022
Reason for choosing most recent leisure destination

- Outstanding natural beauty: 37.5%
- The temperature/climate: 36.8%
- Having friends/family in/nearby: 35.2%
- Activities/sports: 33.8%
- Overall value for money: 33.6%
- Culture and historical sites: 29.6%
- Low cost: 27.0%
- Availability of transportation to destination: 25.4%
- Been before and really liked it/special memory: 24.9%
- Recommended by someone: 22.9%
- Nightlife: 18.0%
- Other: 6.7%
- N/A - Haven't been on vacation recently: 1.1%
- None of these: 0.8%
- Don't know: 0.6%

Source: HVCB analysis of YouGov data provided by HTA as of September 4, 2022
## Reason for choosing most recent leisure destination

**Avid Traveler $150K+**

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outstanding natural beauty</td>
<td>39.3%</td>
</tr>
<tr>
<td>The temperature/climate</td>
<td>36.0%</td>
</tr>
<tr>
<td>Having friends/family in/nearby</td>
<td>34.7%</td>
</tr>
<tr>
<td>Activities/sports</td>
<td>32.2%</td>
</tr>
<tr>
<td>Culture and historical sites</td>
<td>30.6%</td>
</tr>
<tr>
<td>Been before and really liked it/special...</td>
<td>28.6%</td>
</tr>
<tr>
<td>Overall value for money</td>
<td>25.5%</td>
</tr>
<tr>
<td>Low cost</td>
<td>24.3%</td>
</tr>
<tr>
<td>Availability of transportation to destination</td>
<td>21.0%</td>
</tr>
<tr>
<td>Recommended by someone</td>
<td>18.8%</td>
</tr>
<tr>
<td>Nightlife</td>
<td>18.4%</td>
</tr>
<tr>
<td>Other</td>
<td>8.7%</td>
</tr>
<tr>
<td>N/A - Haven't been on vacation recently</td>
<td>1.8%</td>
</tr>
<tr>
<td>Don't know</td>
<td>0.8%</td>
</tr>
<tr>
<td>None of these</td>
<td>0.6%</td>
</tr>
</tbody>
</table>

Source: HVCB analysis of YouGov data provided by HTA as of September 4, 2022
Reason for choosing most recent leisure destination

Long Distance Air Traveler under 55

- Having friends/family in/nearby: 44.6%
- Culture and historical sites: 36.6%
- Overall value for money: 36.5%
- The temperature/climate: 36.3%
- Activities/sports: 36.1%
- Outstanding natural beauty: 34.9%
- Low cost: 33.5%
- Recommended by someone: 33.2%
- Availability of transportation to destination: 31.8%
- Been before and really liked it/special…: 27.7%
- Nightlife: 21.6%
- Other: 10.6%
- N/A - Haven’t been on vacation recently: 2.7%
- None of these: 2.5%
- Don’t know: 1.7%

Source: HVCB analysis of YouGov data provided by HTA as of September 4, 2022
## Reason for choosing most recent leisure destination

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall value for money</td>
<td>29.7%</td>
</tr>
<tr>
<td>Having friends/family in/nearby</td>
<td>26.1%</td>
</tr>
<tr>
<td>Outstanding natural beauty</td>
<td>23.8%</td>
</tr>
<tr>
<td>Low cost</td>
<td>23.7%</td>
</tr>
<tr>
<td>The temperature/climate</td>
<td>23.3%</td>
</tr>
<tr>
<td>N/A - Haven’t been on vacation recently</td>
<td>22.8%</td>
</tr>
<tr>
<td>Been before and really liked it/special memory</td>
<td>19.2%</td>
</tr>
<tr>
<td>Culture and historical sites</td>
<td>17.8%</td>
</tr>
<tr>
<td>Activities/sports</td>
<td>16.8%</td>
</tr>
<tr>
<td>Availability of transportation to destination</td>
<td>14.4%</td>
</tr>
<tr>
<td>Recommended by someone</td>
<td>14.1%</td>
</tr>
<tr>
<td>Nightlife</td>
<td>9.2%</td>
</tr>
<tr>
<td>Other</td>
<td>6.5%</td>
</tr>
<tr>
<td>None of these</td>
<td>2.5%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>1.9%</td>
</tr>
</tbody>
</table>

Source: HVCB analysis of YouGov data provided by HTA as of September 4, 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 September 4, 2022.
Most recent leisure trip - total spend

<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>More than $4,000</td>
<td>18%</td>
<td>14%</td>
<td>4%</td>
<td></td>
</tr>
<tr>
<td>$2,500-$3,999</td>
<td>16%</td>
<td>20%</td>
<td>15%</td>
<td>5%</td>
</tr>
<tr>
<td>$1,500-$2,499</td>
<td>21%</td>
<td>16%</td>
<td>20%</td>
<td>9%</td>
</tr>
<tr>
<td>Less than $1,500</td>
<td>35%</td>
<td>30%</td>
<td>39%</td>
<td>39%</td>
</tr>
<tr>
<td>Nothing/Don't Know</td>
<td>40%</td>
<td>9%</td>
<td>8%</td>
<td>10%</td>
</tr>
</tbody>
</table>

Source: HVCB analysis of YouGov data provided by HTA as of September 4, 2022
Leisure trip - next destination

Leisure trip within the continental U.S.
- Avid Traveler $100K+: 22%
- Avid Traveler $150K+: 26%
- Long-Distance Air Traveler under 55*: 18%
- Nat Rep: 16%

Alaska
- Avid Traveler $100K+: 11%
- Avid Traveler $150K+: 7%
- Long-Distance Air Traveler under 55*: 6%
- Nat Rep: 2%

Hawai’i
- Avid Traveler $100K+: 25%
- Avid Traveler $150K+: 32%
- Long-Distance Air Traveler under 55*: 11%
- Nat Rep: 10%

The Caribbean or West Indies
- Avid Traveler $100K+: 4%
- Avid Traveler $150K+: 5%
- Long-Distance Air Traveler under 55*: 5%
- Nat Rep: 7%

Mexico
- Avid Traveler $100K+: 5%
- Avid Traveler $150K+: 7%
- Long-Distance Air Traveler under 55*: 6%
- Nat Rep: 5%

Canada
- Avid Traveler $100K+: 3%
- Avid Traveler $150K+: 3%
- Long-Distance Air Traveler under 55*: 2%
- Nat Rep: 7%

Europe
- Avid Traveler $100K+: 11%
- Avid Traveler $150K+: 11%
- Long-Distance Air Traveler under 55*: 4%
- Nat Rep: 2%

Asia
- Avid Traveler $100K+: 2%
- Avid Traveler $150K+: 2%
- Long-Distance Air Traveler under 55*: 4%
- Nat Rep: 2%

Oceania (e.g., Australia, New Zealand, etc.)
- Avid Traveler $100K+: 1%
- Avid Traveler $150K+: 3%
- Long-Distance Air Traveler under 55*: 1%
- Nat Rep: 2%

Don’t know
- Avid Traveler $100K+: 12%
- Avid Traveler $150K+: 14%
- Long-Distance Air Traveler under 55*: 7%
- Nat Rep: 18%

*YouGov sample size <100

Source: HVCB analysis of YouGov data provided by HTA as of September 4, 2022
Leisure trip - activities in last 12 months

- Stayed in a hotel or motel: 61% Avid Traveler $100K+, 60% Avid Traveler $150K+, 60% Nat Rep
- Stayed in short-term/vacation rental: 31% Avid Traveler $100K+, 32% Avid Traveler $150K+, 37% Nat Rep
- Taken a cruise: 12% Avid Traveler $100K+, 16% Avid Traveler $150K+, 15% Nat Rep
- Traveled by air: 23% Avid Traveler $100K+, 20% Avid Traveler $150K+, 19% Nat Rep
- Traveled using a package deal: 19% Avid Traveler $100K+, 19% Avid Traveler $150K+, 20% Nat Rep
- Rented a car: 36% Avid Traveler $100K+, 39% Avid Traveler $150K+, 38% Nat Rep
- Used online rideshare services: 37% Avid Traveler $100K+, 40% Avid Traveler $150K+, 41% Nat Rep
- Visited a travel destination (e.g., museums, resorts, etc.): 46% Avid Traveler $100K+, 47% Avid Traveler $150K+, 54% Nat Rep

Source: HVCB analysis of YouGov data provided by HTA as of September 4, 2022
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

Source: HVCC analysis of YouGov data provided by HTA as of September 4, 2022
When I go on vacation I only want to eat, drink and lie in the sun

I tend to spend my leisure time on hobbies and activities

I like to spend my leisure time relaxing

Source: HVCB analysis of YouGov data provided by HTA as of September 4, 2022
When I’m planning my next vacation, I have at least one destination in mind or already selected

- **Avid Traveler $100K+**: 81%
- **Avid Traveler $150K+**: 85%
- **Long-Distance Air Traveler under 55**: 87%
- **Nat Rep**: 69%

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

- **Avid Traveler $100K+**: 35%
- **Avid Traveler $150K+**: 43%
- **Long-Distance Air Traveler under 55**: 42%
- **Nat Rep**: 52%

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**: 64%
- **Nat Rep**: 41%

I usually go back to the same places on vacation

- **Avid Traveler $100K+**: 51%
- **Avid Traveler $150K+**: 51%
- **Long-Distance Air Traveler under 55**: 50%
- **Nat Rep**: 48%

Source: HVCB analysis of YouGov data provided by HTA as of September 4, 2022
Booking & Spending Attitudes

I would never think of taking a package holiday/vacations
- Avid Traveler $100K+: 43%
- Avid Traveler $150K+: 35%
- Long-Distance Air Traveler under 55: 39%
- Nat Rep: 39%

I try to keep to a strict budget when I go on vacation
- Avid Traveler $100K+: 61%
- Avid Traveler $150K+: 53%
- Long-Distance Air Traveler under 55: 45%
- Nat Rep: 48%

I am excited to generally spend more when traveling
- Avid Traveler $100K+: 66%
- Avid Traveler $150K+: 67%
- Long-Distance Air Traveler under 55: 62%
- Nat Rep: 47%

Source: HVCB analysis of YouGov data provided by HTA as of September 4, 2022