

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)

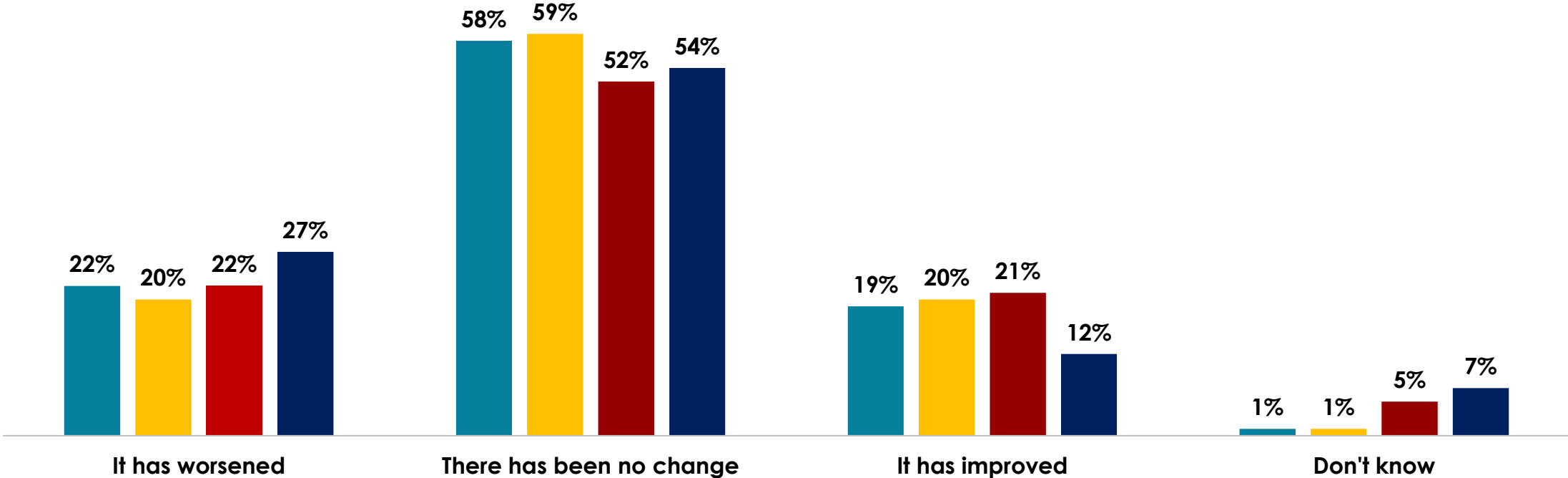
- Representative of U.S. adults in terms of age, gender, social class and education



Travelers' Pandemic Outlook

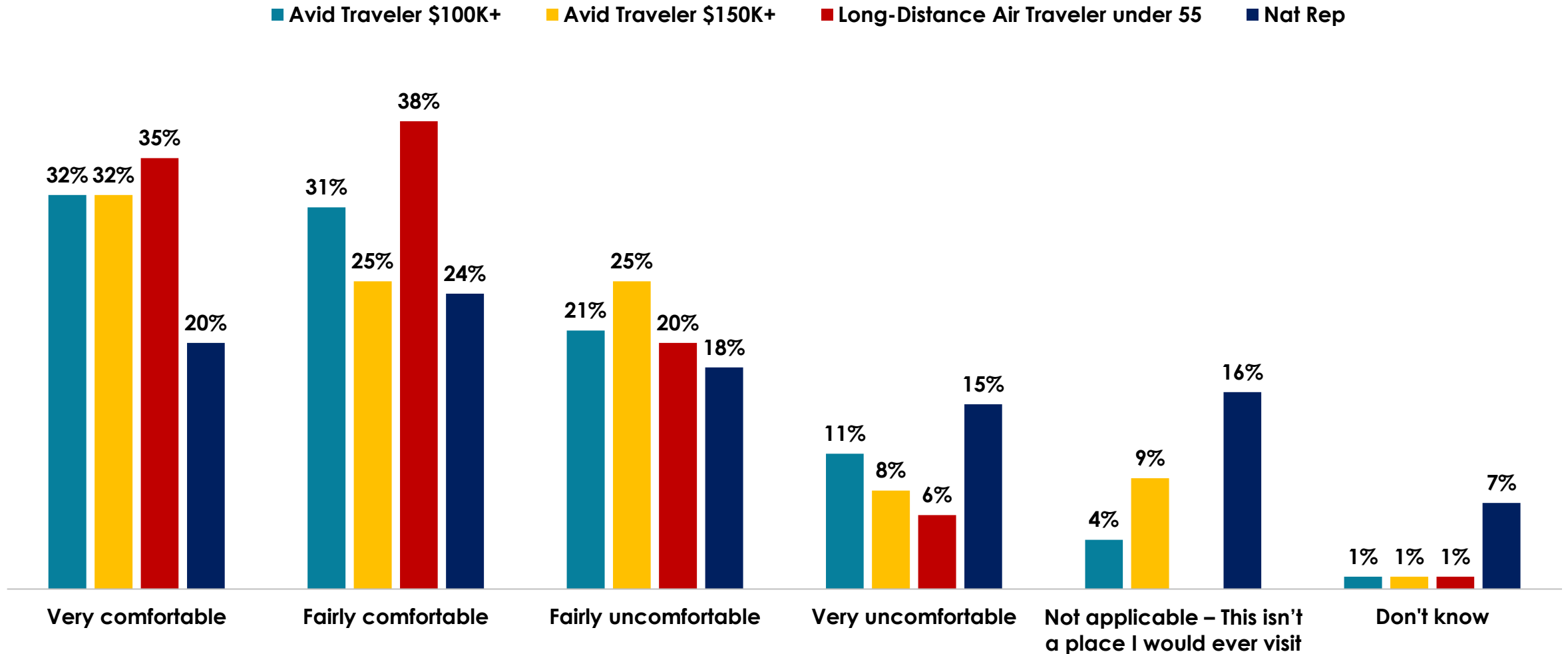
How has your household economic situation changed in the past month?

■ 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

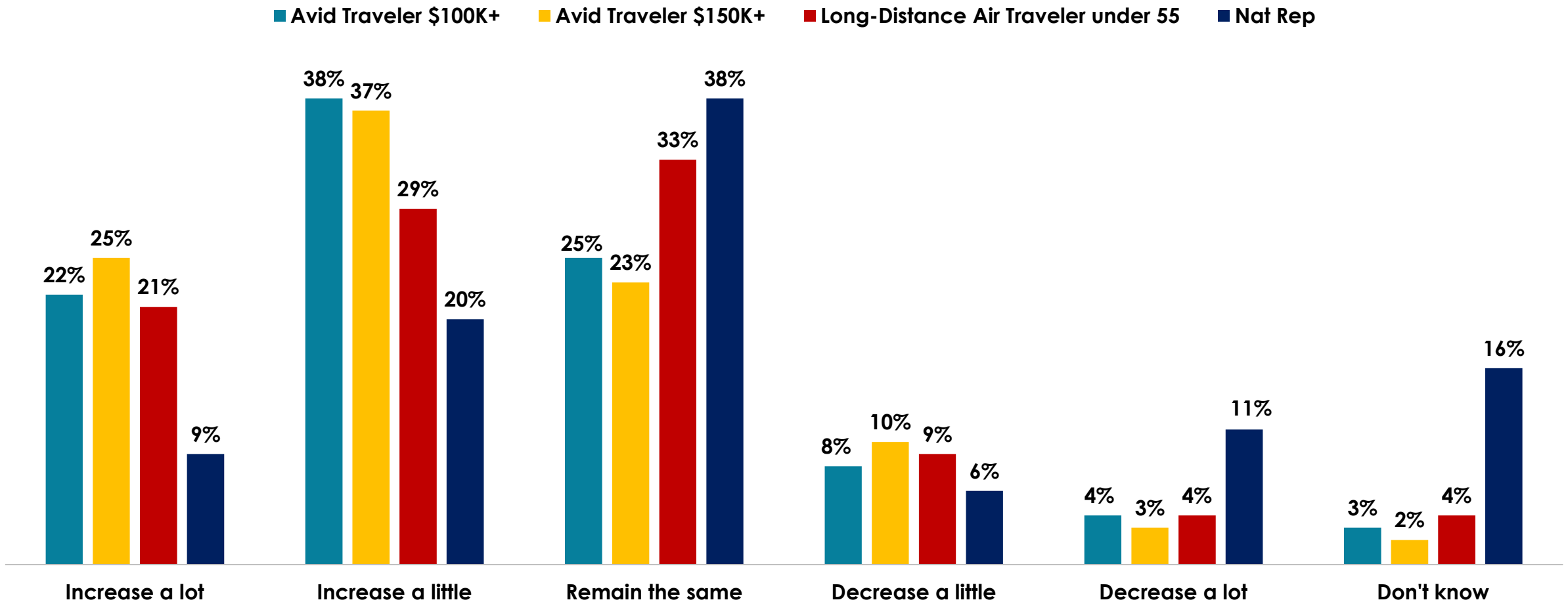
Level of comfort visiting an airport right now





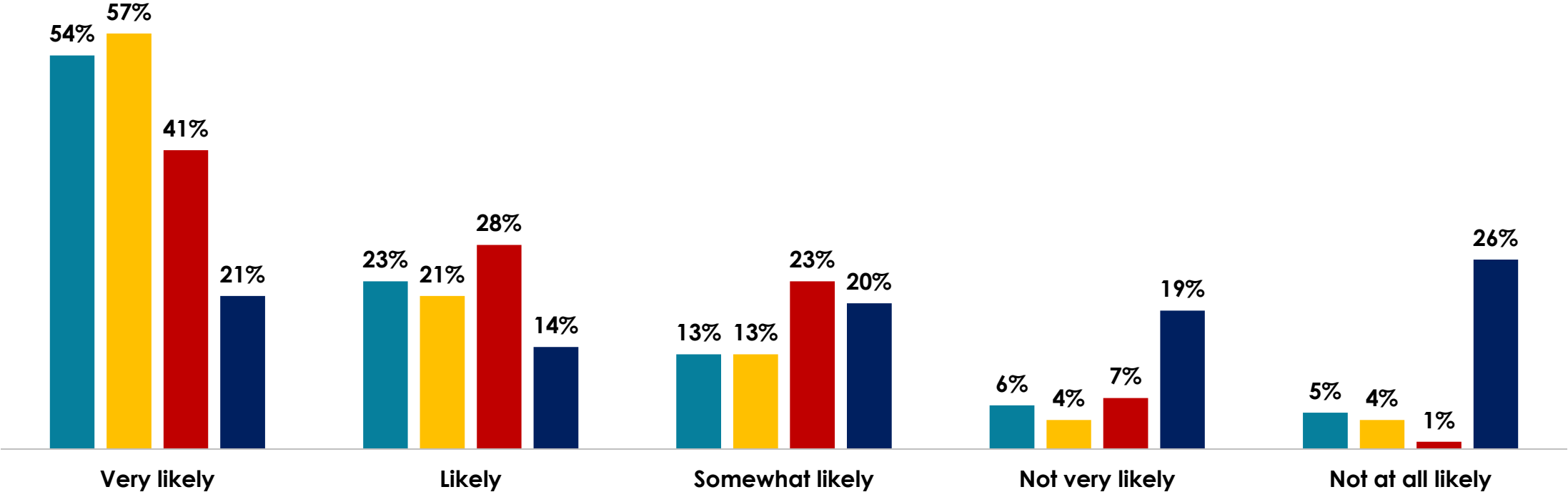
Future Travel Plans

Future Travel – Expected change to air travel in the next 12 months



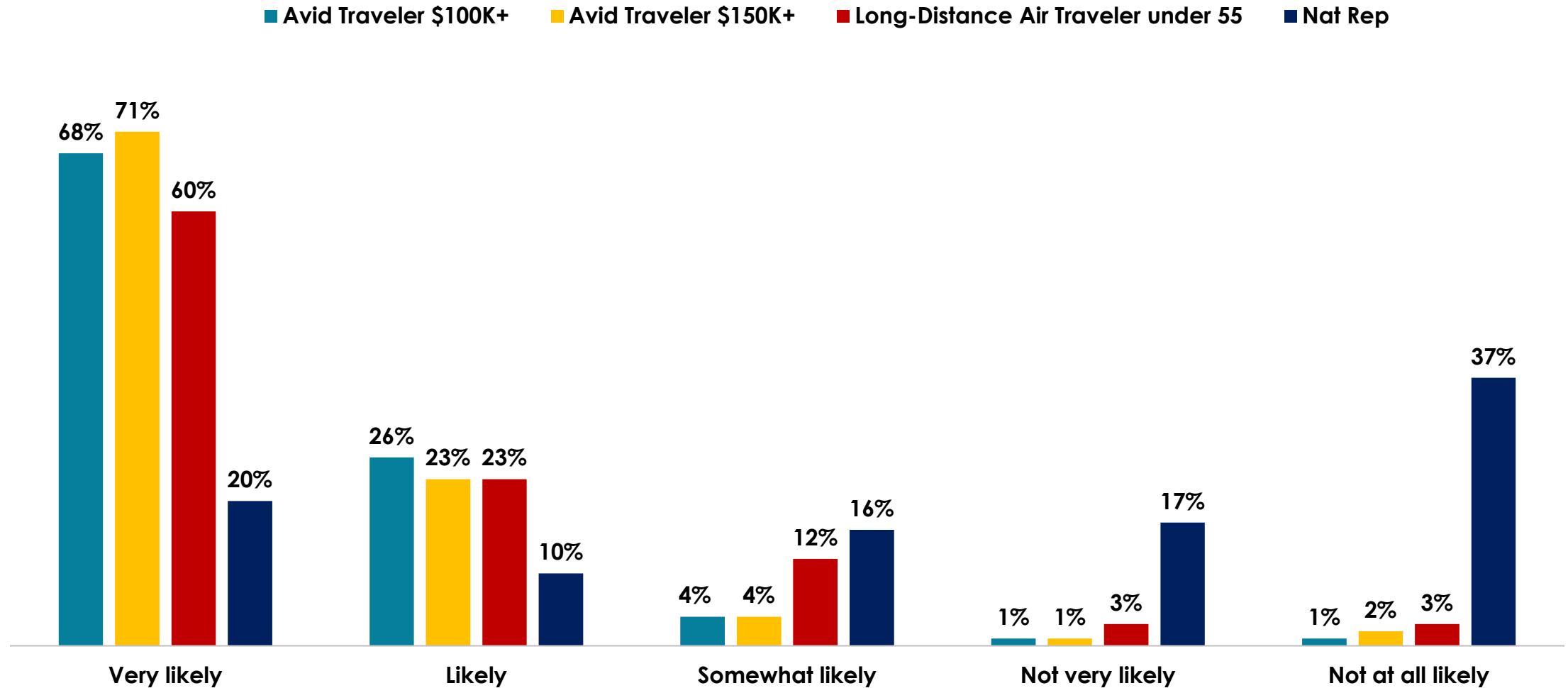
Future Travel – Likelihood of purchasing travel or leisure services in the next 12 months

■ 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 September 4, 2022

Future Travel – Likelihood of booking a flight in the next 12 months



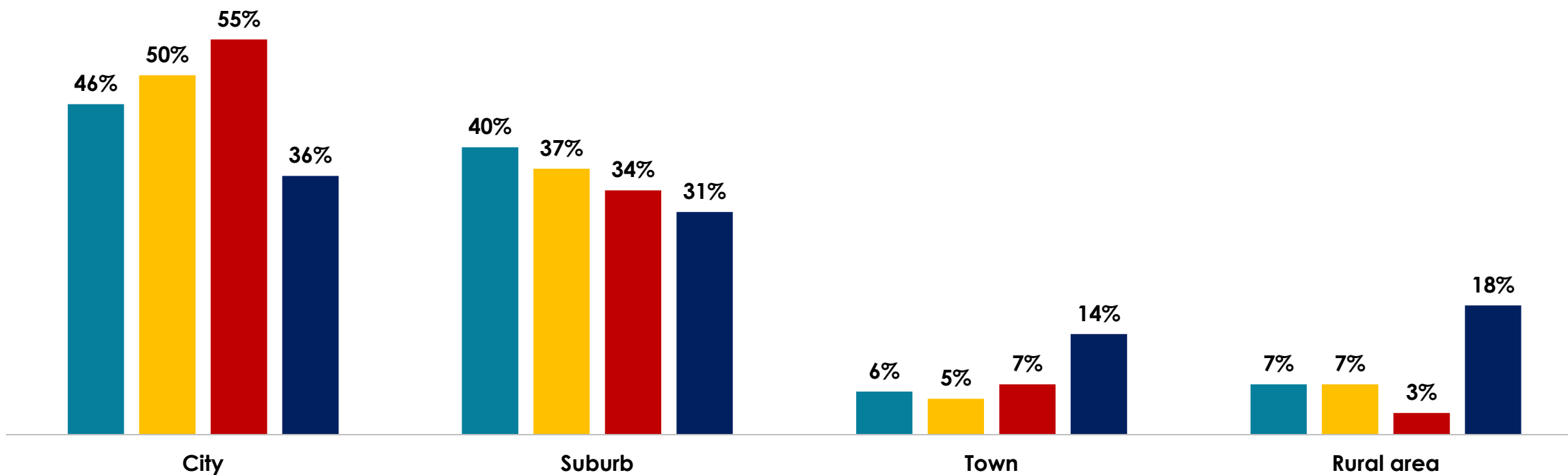


Traveler Profiles

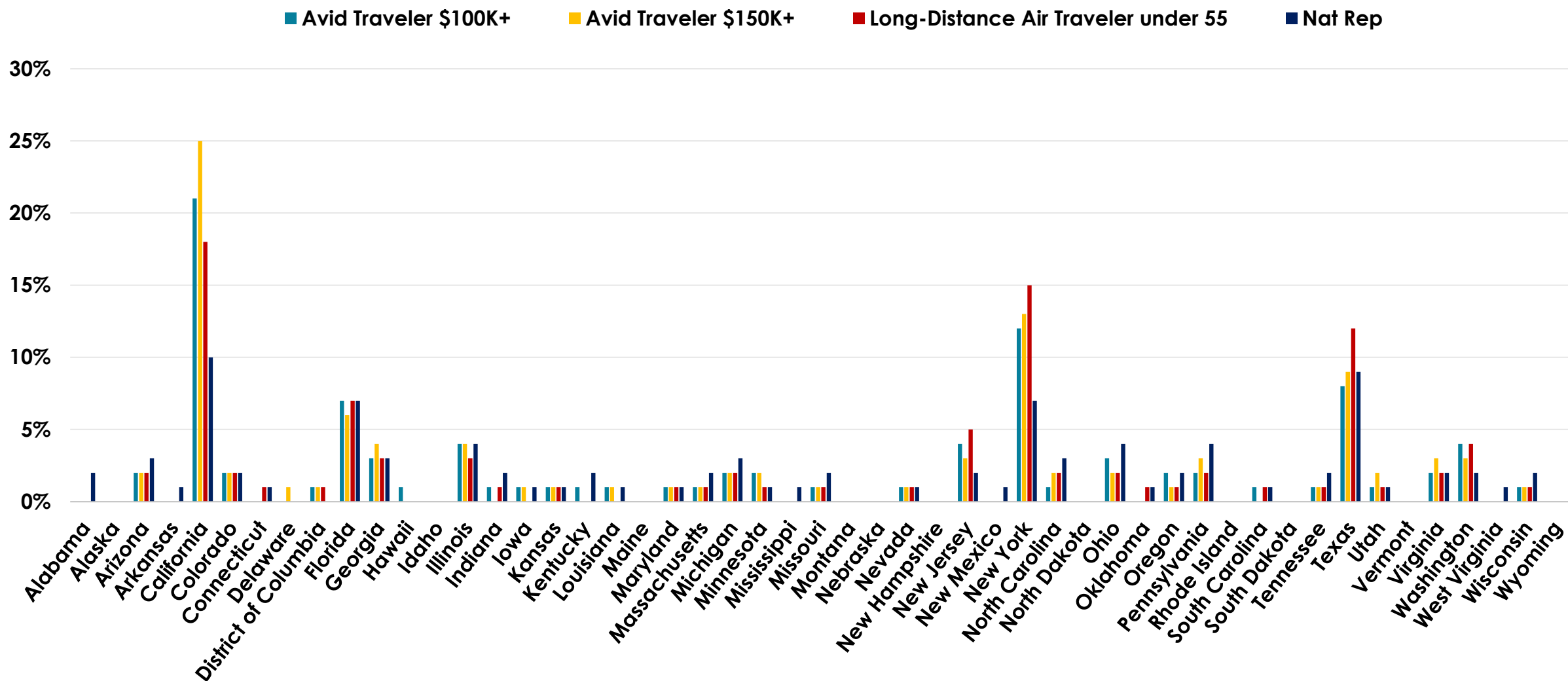
Avid Travelers vs. Long-Distance Air Travelers vs. Nat. Rep.

Type of Area Living In

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



State of Residence



Top 10 States of Residence by Segment

Avid Traveler \$100K, 25-54, individual

California	20.8%
New York	11.6%
Texas	8.3%
Florida	6.7%
Illinois	4.2%
Washington	3.9%
New Jersey	3.6%
Ohio	3.3%
Georgia	2.9%
Pennsylvania	2.5%

Avid Traveler \$150K, 25-54, 2+ household

California	24.7%
New York	13.1%
Texas	8.7%
Florida	5.6%
Illinois	4.0%
Georgia	4.0%
Pennsylvania	3.5%
Washington	3.2%
New Jersey	3.0%
Virginia	2.6%

Long-Distance Air Traveler under 55

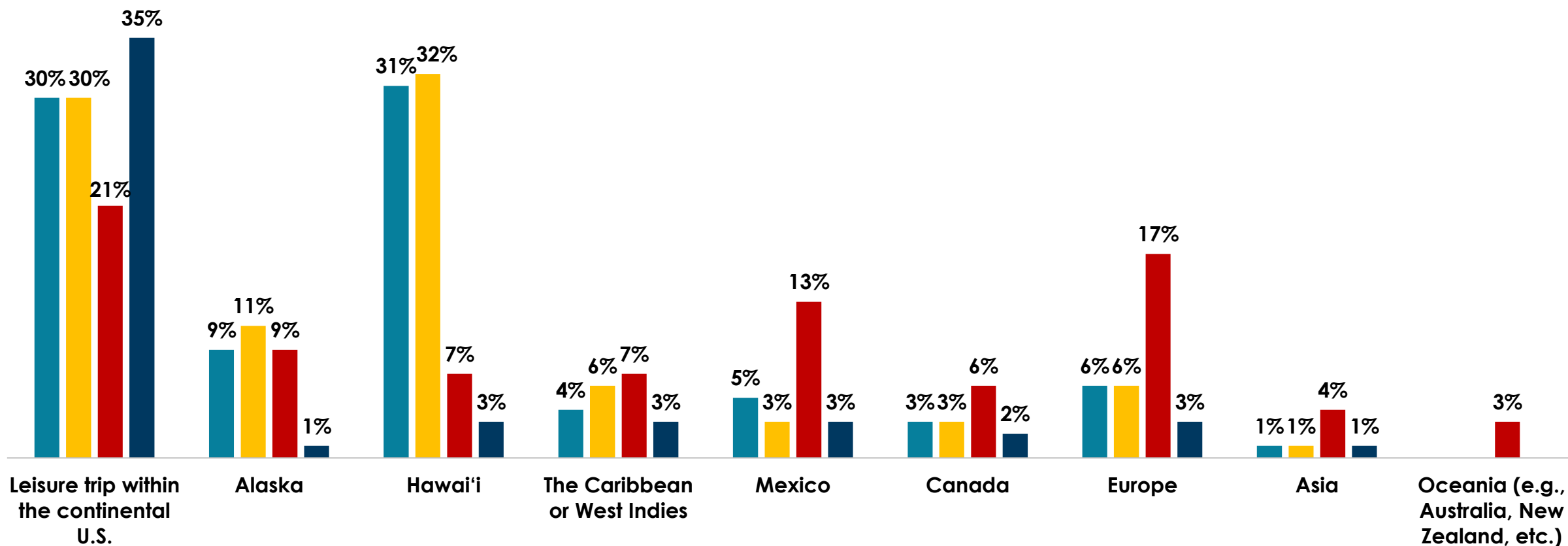
California	17.8%
New York	15.3%
Texas	12.2%
Florida	7.4%
New Jersey	4.6%
Washington	4.4%
Georgia	3.4%
Illinois	3.3%
Michigan	2.3%
Pennsylvania	2.3%

Nat Rep

California	9.8%
Texas	9.0%
Florida	7.2%
New York	7.1%
Pennsylvania	4.3%
Ohio	3.9%
Illinois	3.6%
Georgia	3.1%
Arizona	2.9%
Michigan	2.7%

Leisure trip – most recent destination

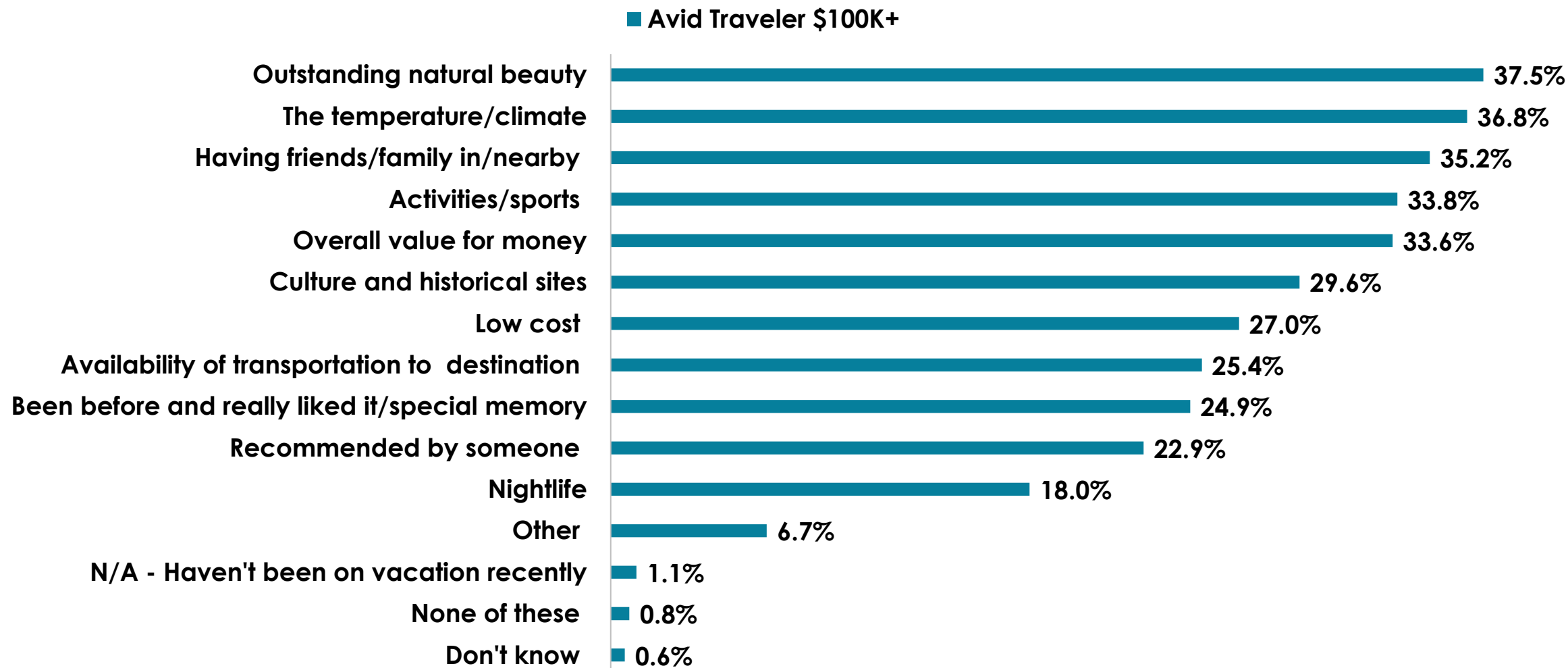
■ Avid Traveler \$100K+
 ■ Avid Traveler \$150K+
 ■ Long-Distance Air Traveler under 55
 ■ Nat Rep



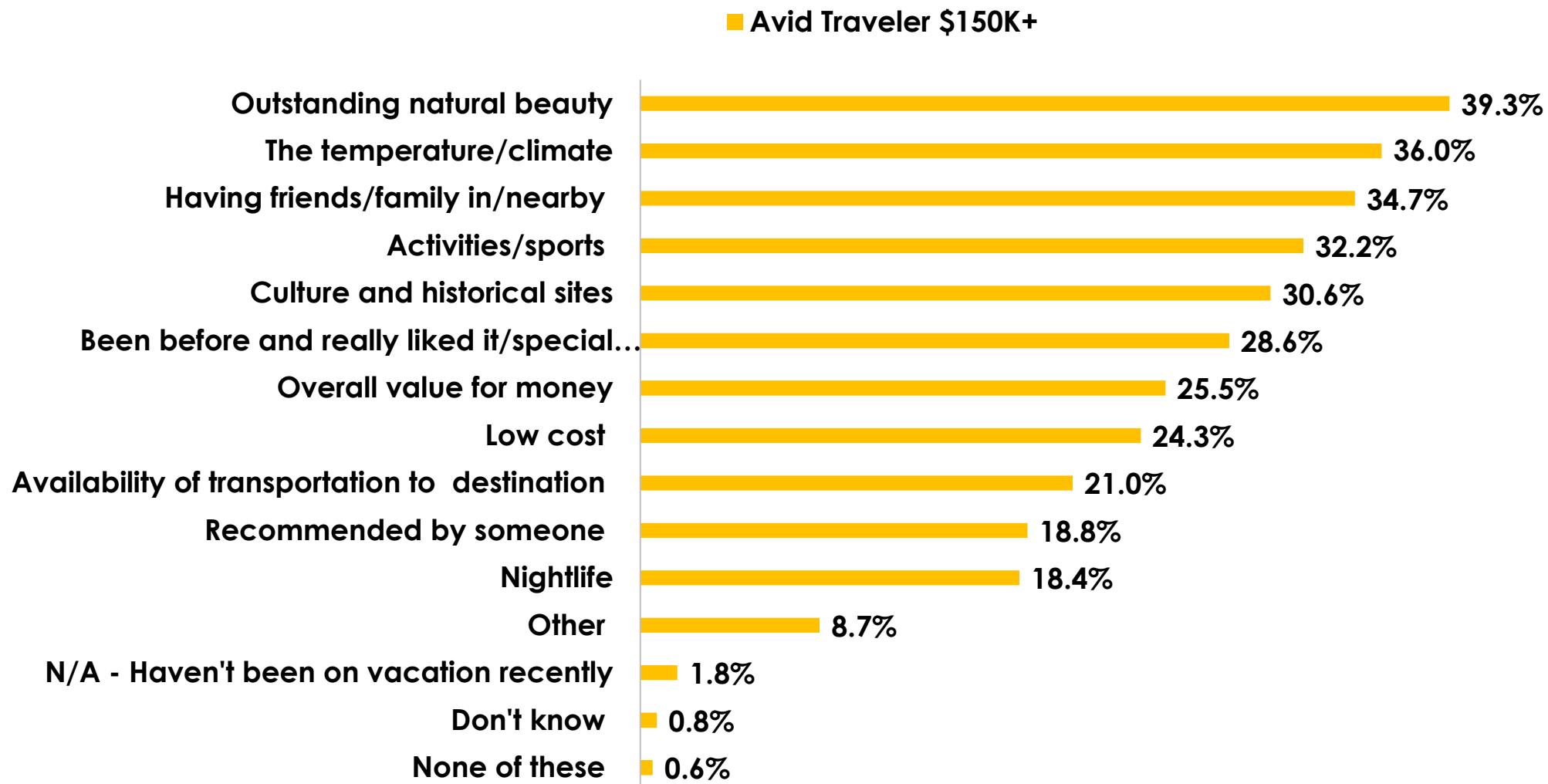
Reason for choosing most recent leisure destination

Reasons	Avid Traveler \$100K, 25-54, individual	Avid Traveler \$150K, 25-54, 2+ household	Long-Distance Air Traveler under 55	Nat Rep
The temperature/climate	36.1%	37.2%	37.4%	23.3%
Availability of transportation to destination	25.5%	23.1%	31.6%	14.5%
Culture and historical sites	29.7%	33.7%	38.9%	17.8%
Overall value for money	35.5%	29.8%	38.6%	30.1%
Activities/sports	30.9%	31.8%	32.6%	17.0%
Outstanding natural beauty	37.5%	39.8%	41.3%	23.8%
Nightlife	20.4%	18.2%	20.2%	9.0%
Having friends/family in/nearby	33.6%	30.6%	45.4%	25.6%
Low cost	27.4%	22.7%	35.9%	23.7%
Been before and really liked it/special memory	27.7%	28.9%	32.2%	19.2%
Recommended by someone	21.5%	17.1%	37.2%	14.3%
Other	6.7%	10.1%	9.2%	6.4%
Don't know	0.2%	0.3%	2.3%	1.9%
None of these	1.0%	0.8%	1.6%	2.6%
N/A - Haven't been on vacation recently	1.4%	1.6%	2.6%	23.1%

Reason for choosing most recent leisure destination

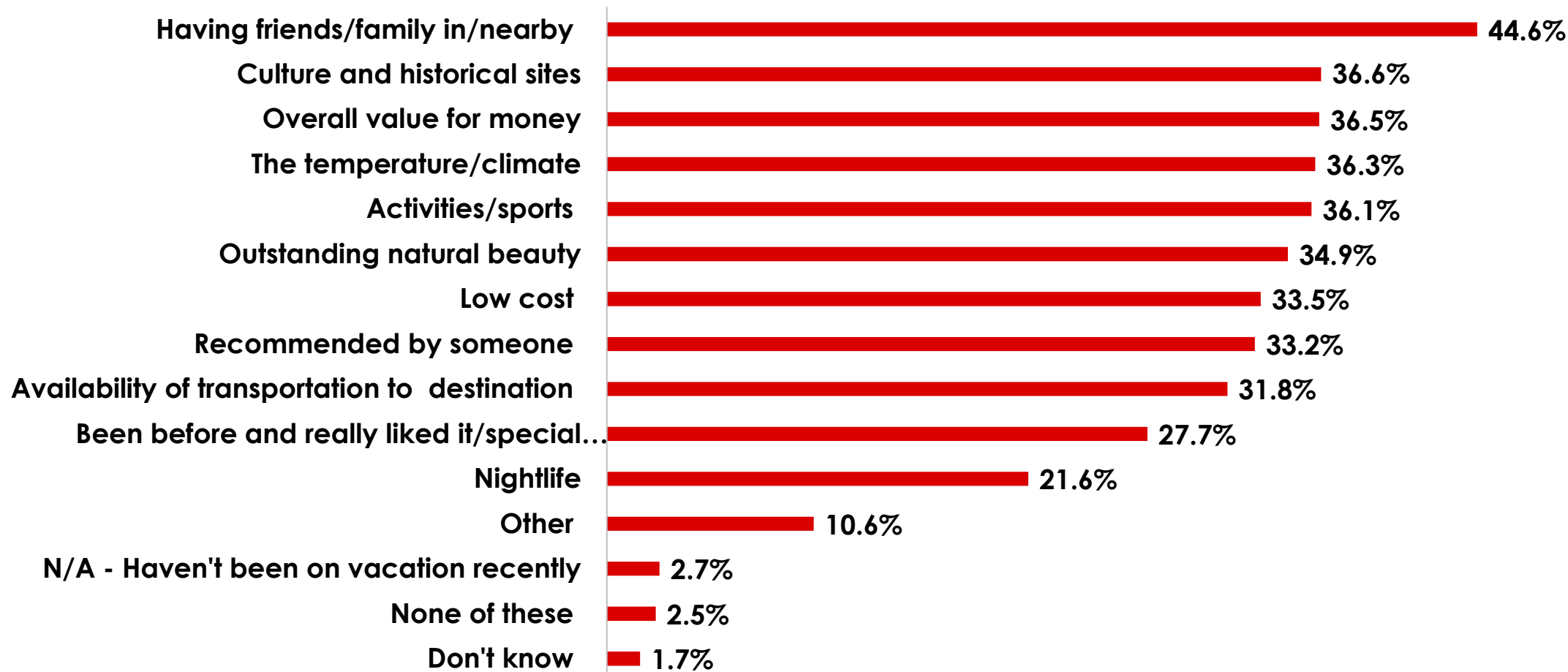


Reason for choosing most recent leisure destination

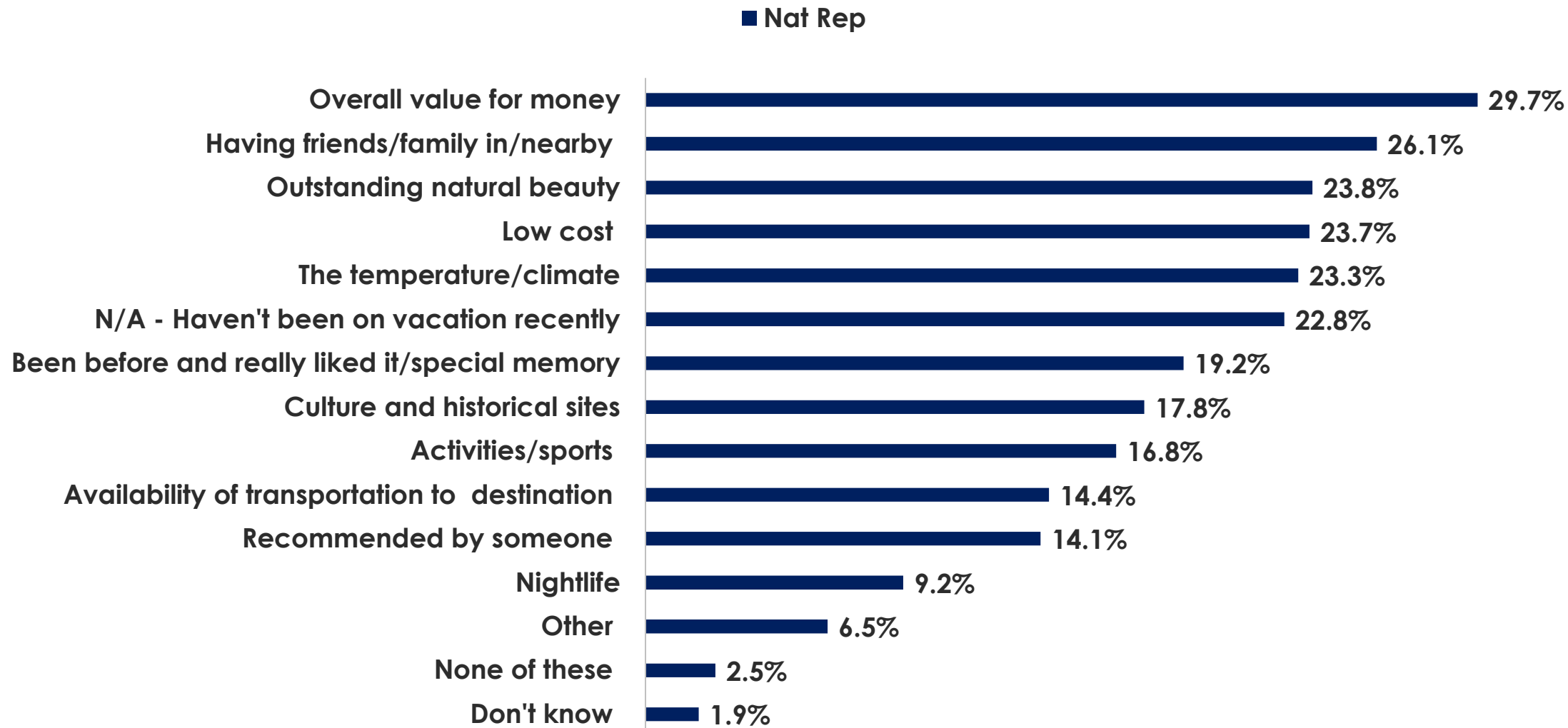


Reason for choosing most recent leisure destination

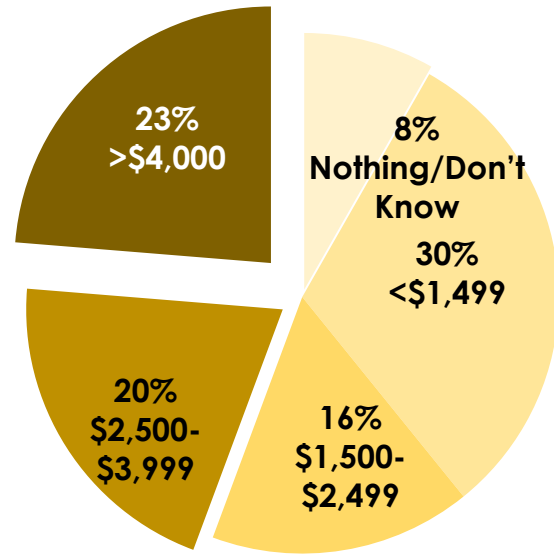
■ Long Distance Air Traveler under 55



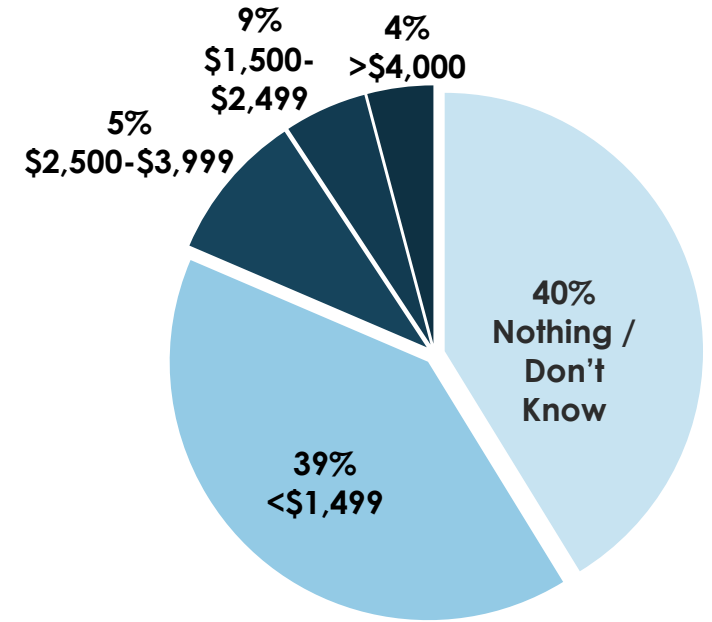
Reason for choosing most recent leisure destination



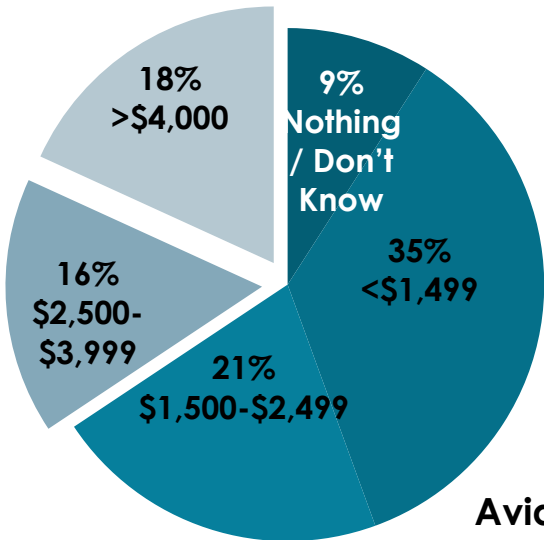
Most recent leisure trip - total spend



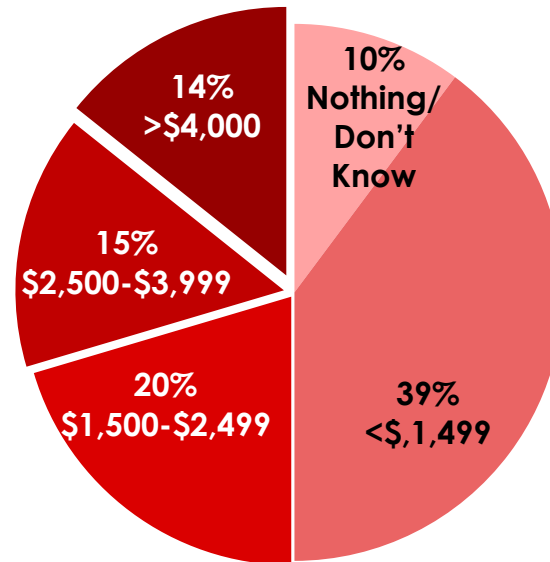
Avid Travelers \$150K+



Nat Rep



Avid Travelers \$100K+

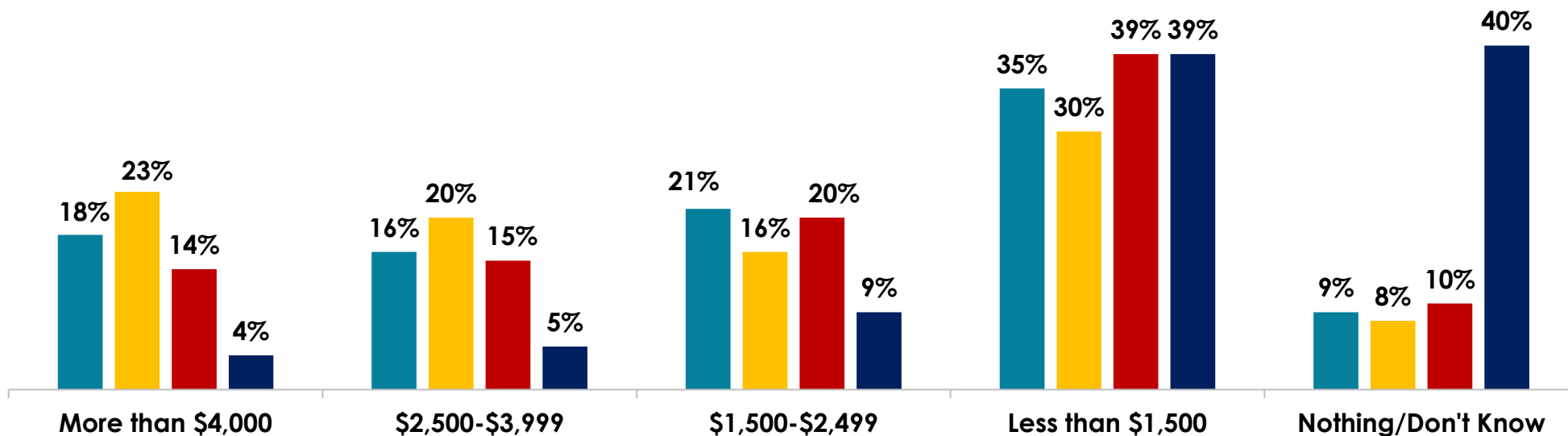


Long-Distance Air Travelers under 55

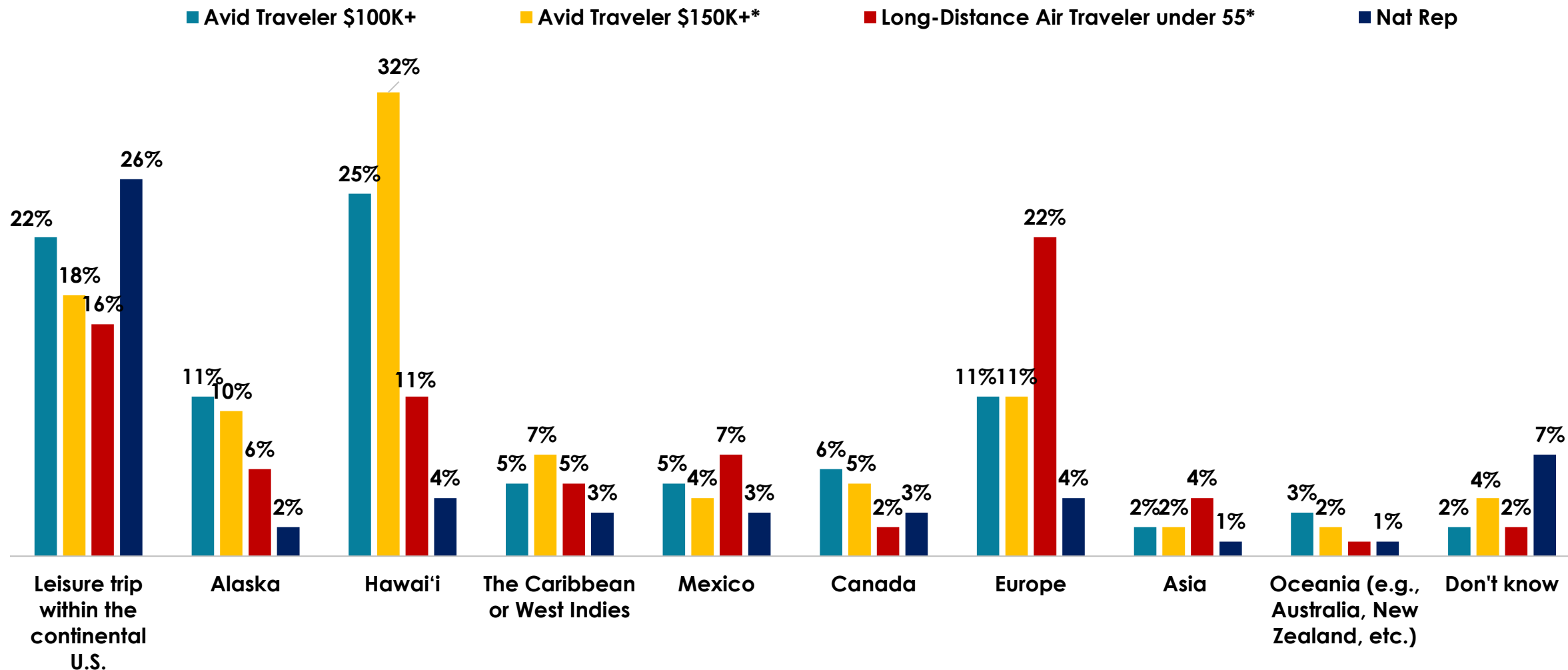
Based on Hawai'i Tourism Authority data, the average U.S. per person per trip spend for 2019 was \$1,693.32.

Most recent leisure trip - total spend

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



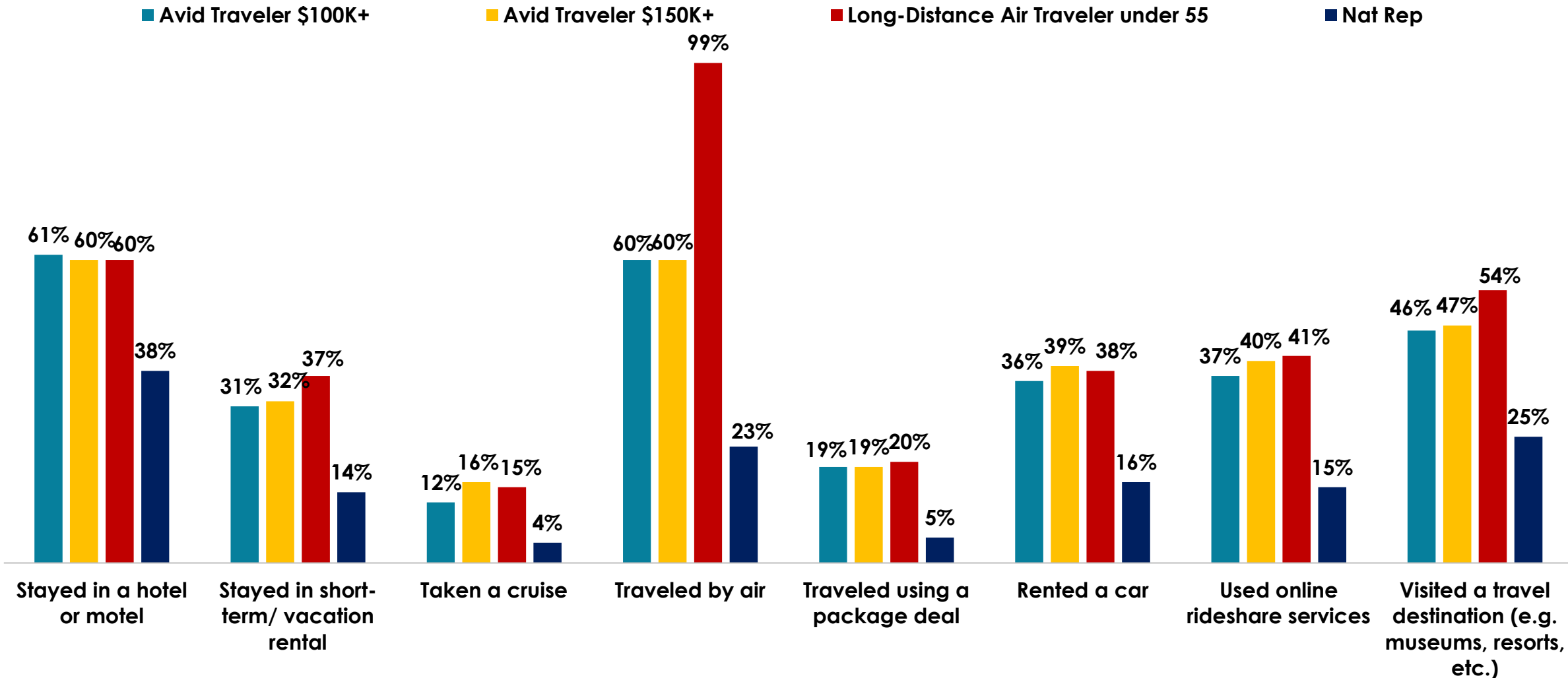
Leisure trip - next destination



*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



Travel Mindset

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



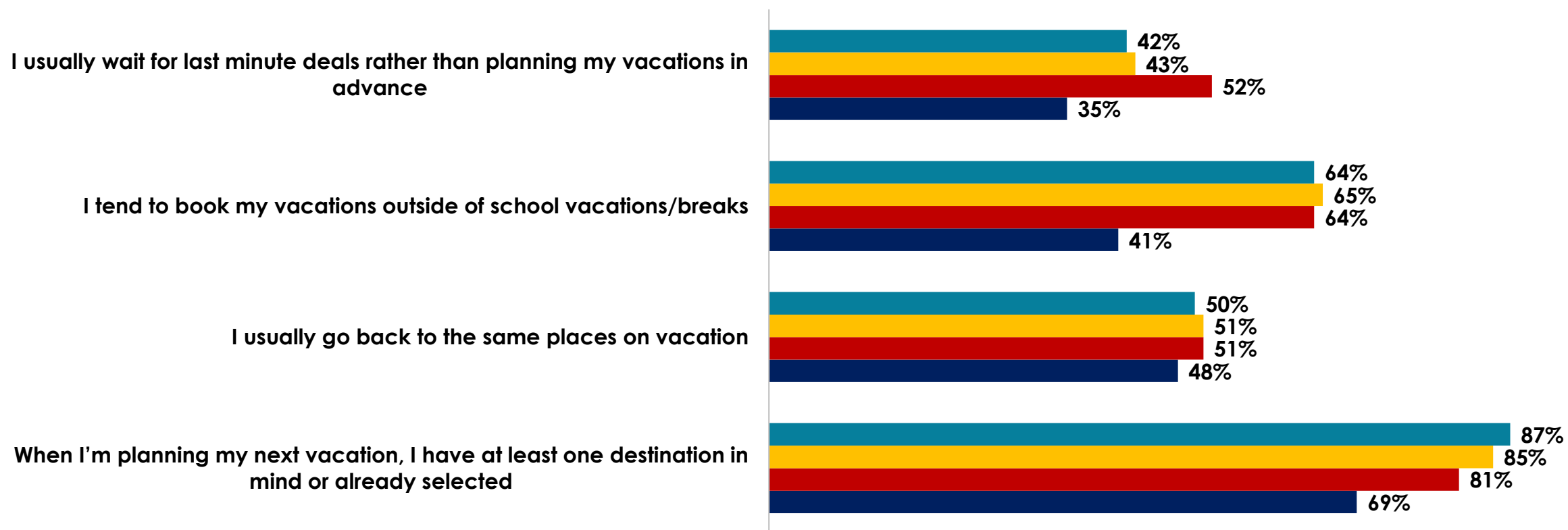
Travel Activities

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



Booking & Spending Attitudes

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



Booking & Spending Attitudes

