

# COVID-19 Impact on U.S. Avid Travelers

An HVCB analysis of YouGov data provided by HTA as of January 9, 2022

Reported on January 20, 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)

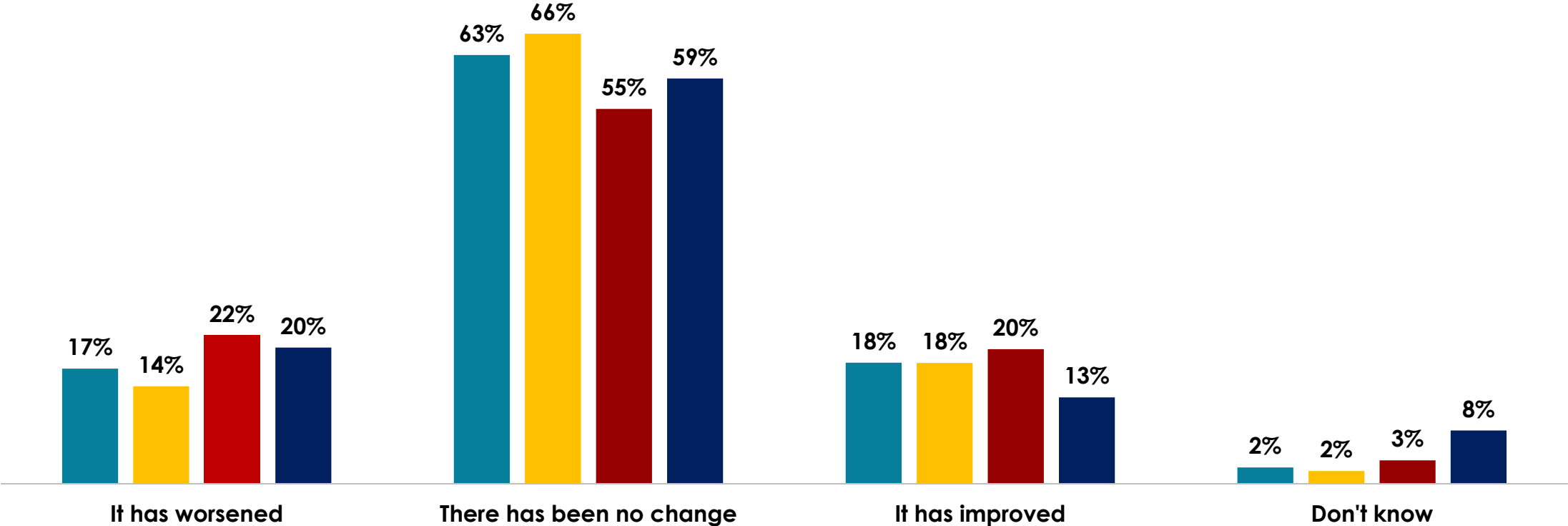
- Representative of U.S. adults in terms of age, gender, social class and education



# Travelers' Pandemic Outlook

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

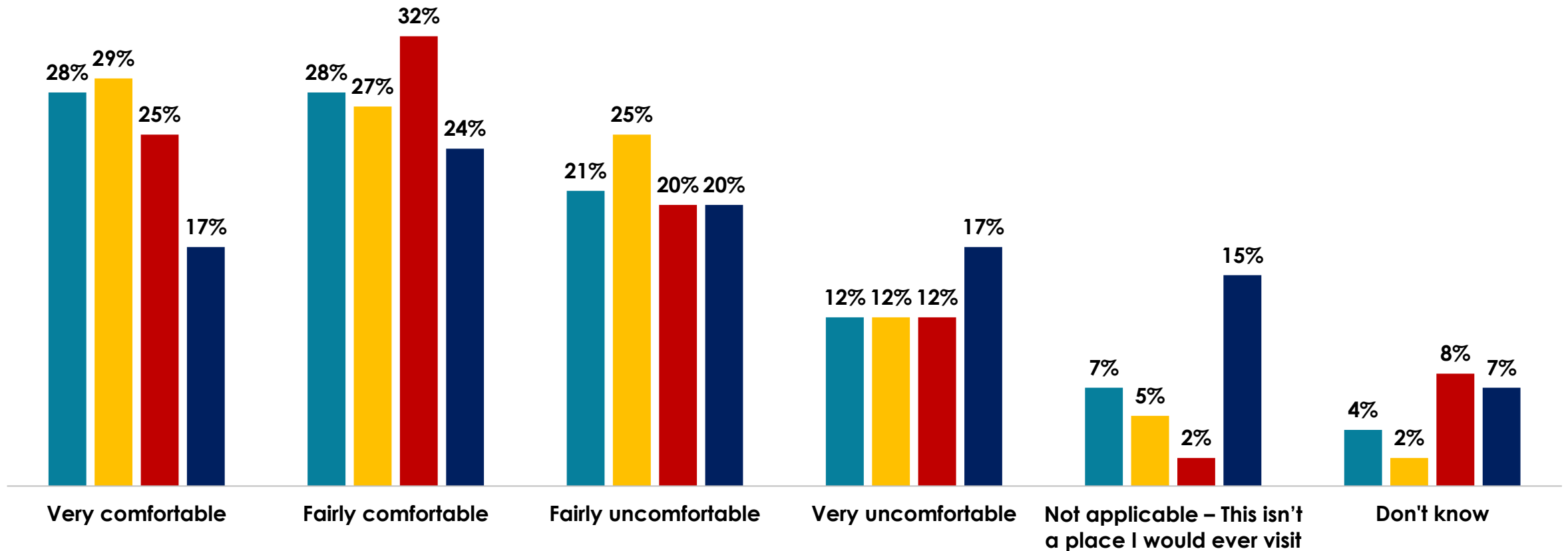
■ Avid Traveler \$100K+   ■ Avid Traveler \$150K+   ■ Long-Distance Air Traveler under 55   ■ Nat Rep



Source: HVCB analysis of YouGov data provided by HTA as of January 9, 2022

# Level of comfort visiting an airport right now

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

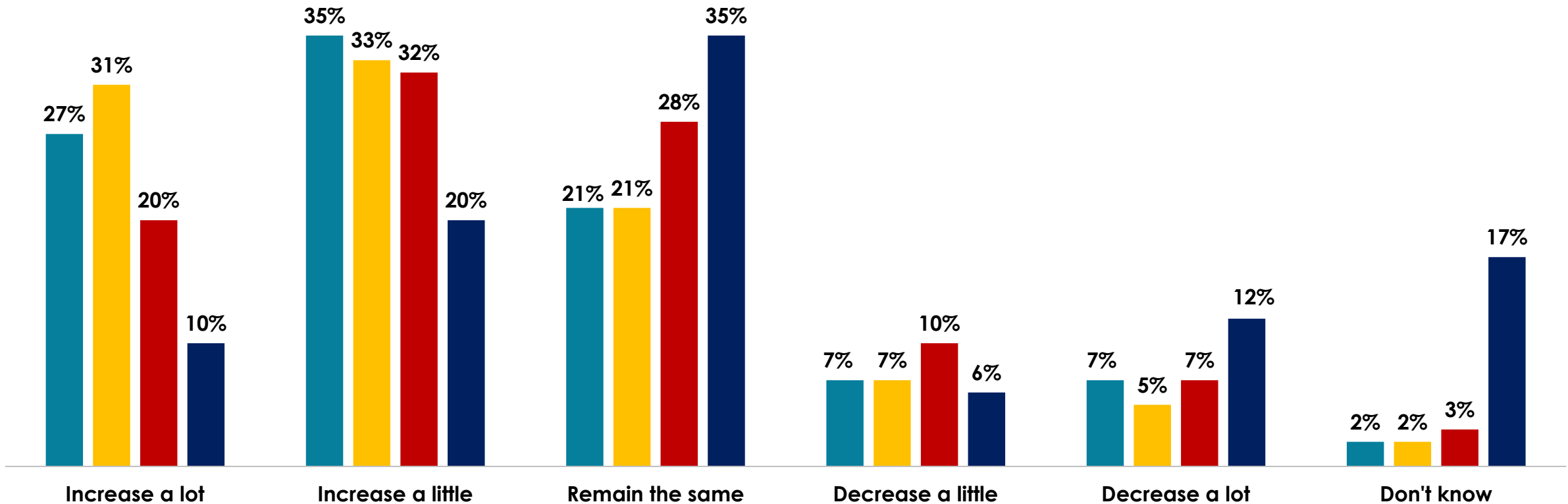




# Future Travel Plans

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

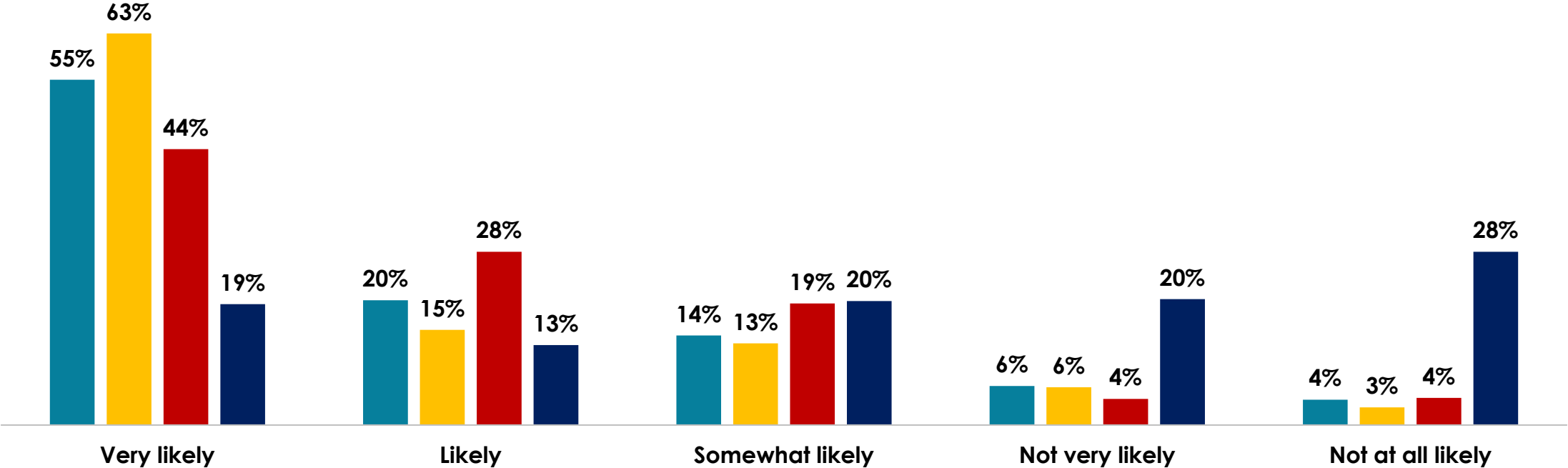
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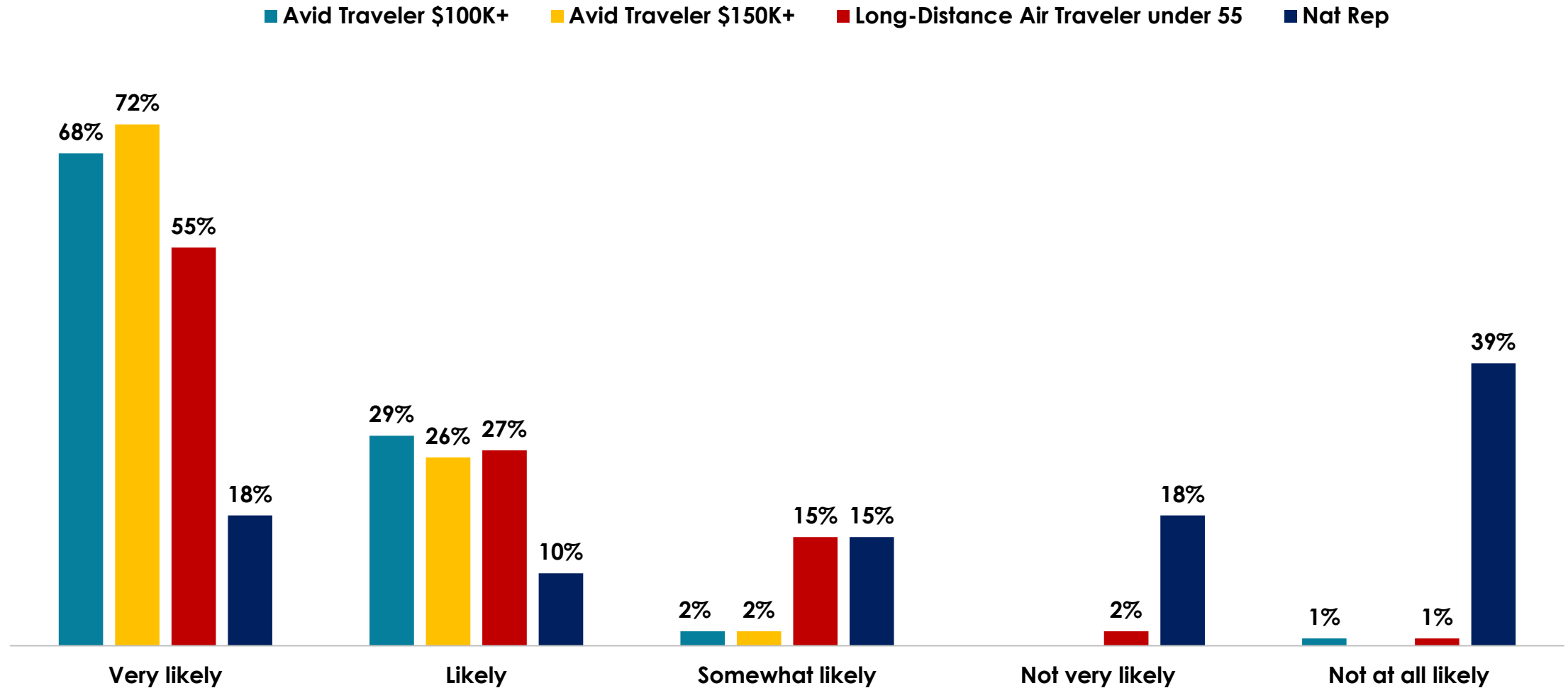
# Future Travel – Likelihood of purchasing travel or leisure services in the next 12 months

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



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



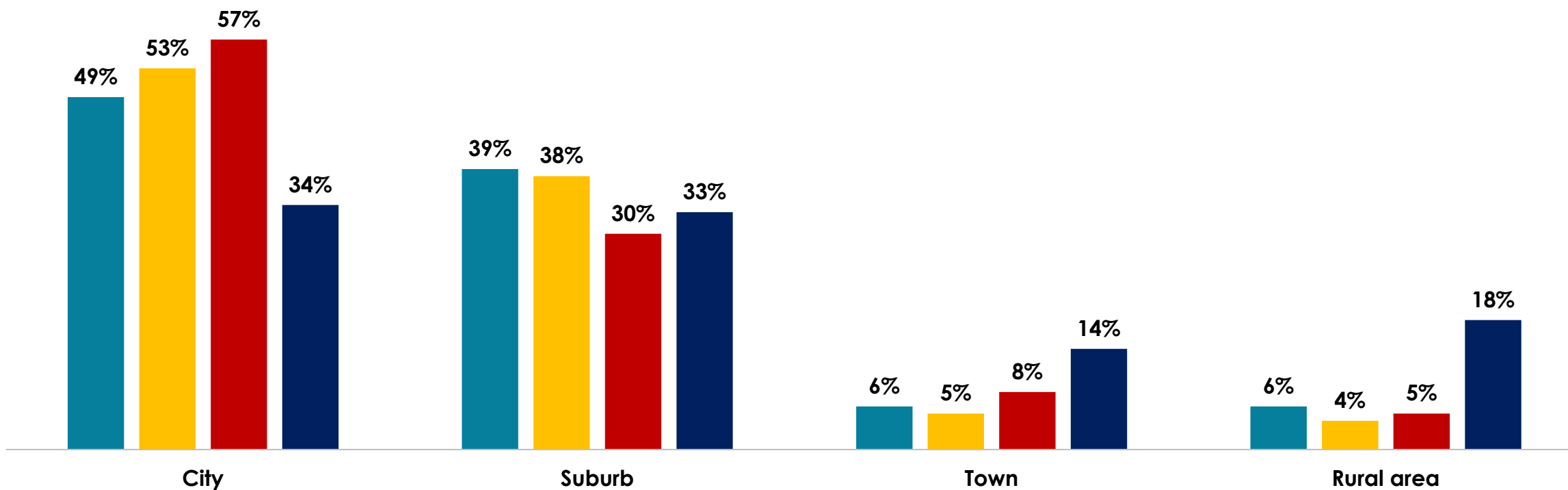


# Traveler Profiles

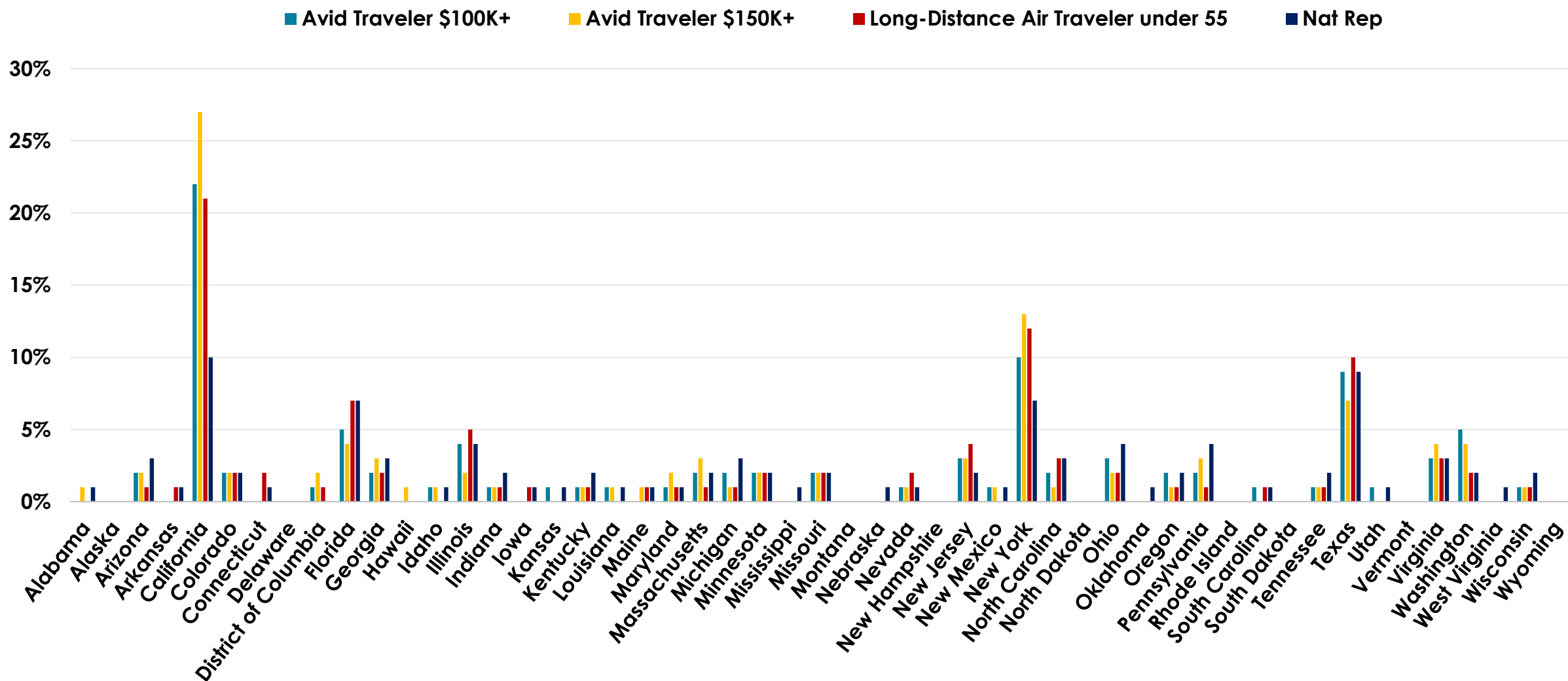
Avid Travelers vs. Long-Distance Air Travelers vs. Nat. Rep.

# 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	21.6%
New York	10.1%
Texas	9.0%
Florida	5.3%
Washington	4.6%
Illinois	4.1%
Virginia	3.4%
New Jersey	2.8%
Ohio	2.8%
Georgia	2.4%

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

California	26.5%
New York	13.1%
Texas	7.4%
Washington	4.5%
Florida	4.4%
Virginia	3.7%
Massachusetts	3.6%
Georgia	2.8%
New Jersey	2.4%
Pennsylvania	2.4%

## Long-Distance Air Traveler under 55

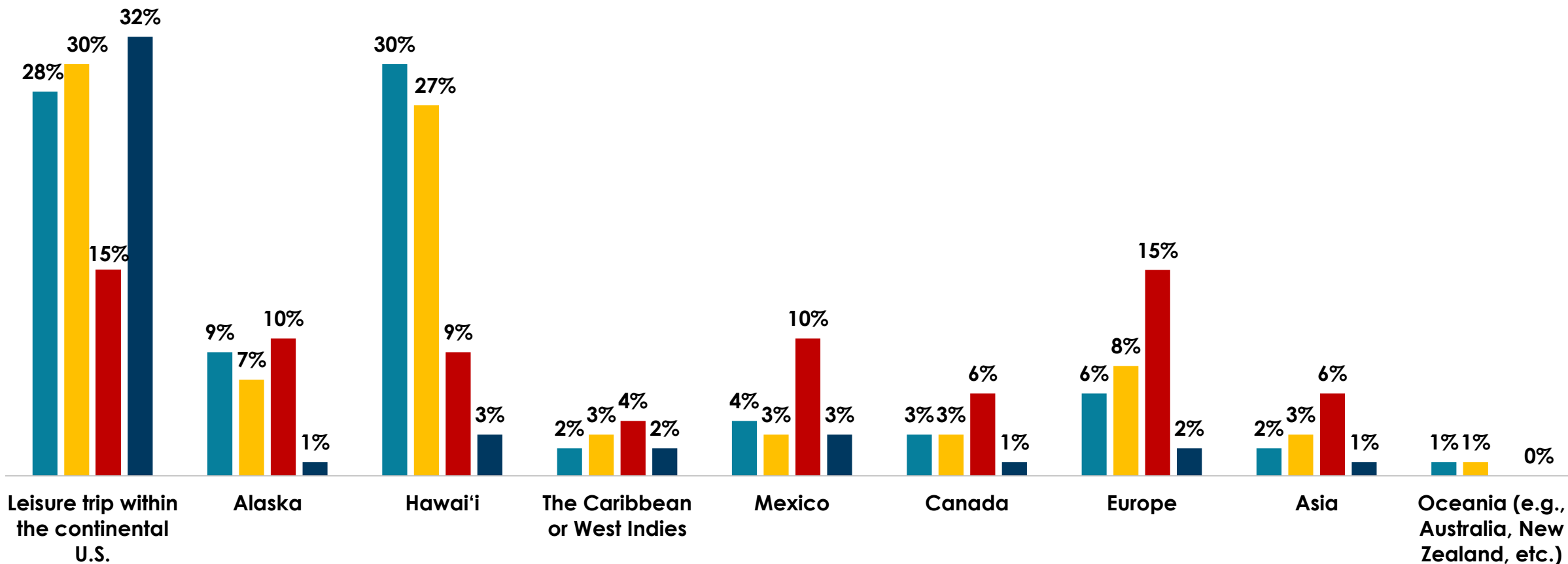
California	20.7%
New York	12.2%
Texas	10.3%
Florida	6.9%
Illinois	4.9%
New Jersey	4.1%
Virginia	2.8%
North Carolina	2.7%
Ohio	2.4%
Georgia	2.4%

## Nat Rep

California	10.4%
Texas	8.9%
Florida	7.0%
New York	6.6%
Pennsylvania	4.3%
Ohio	3.8%
Illinois	3.6%
Georgia	3.2%
North Carolina	2.8%
Michigan	2.8%

# Leisure trip – most recent destination

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

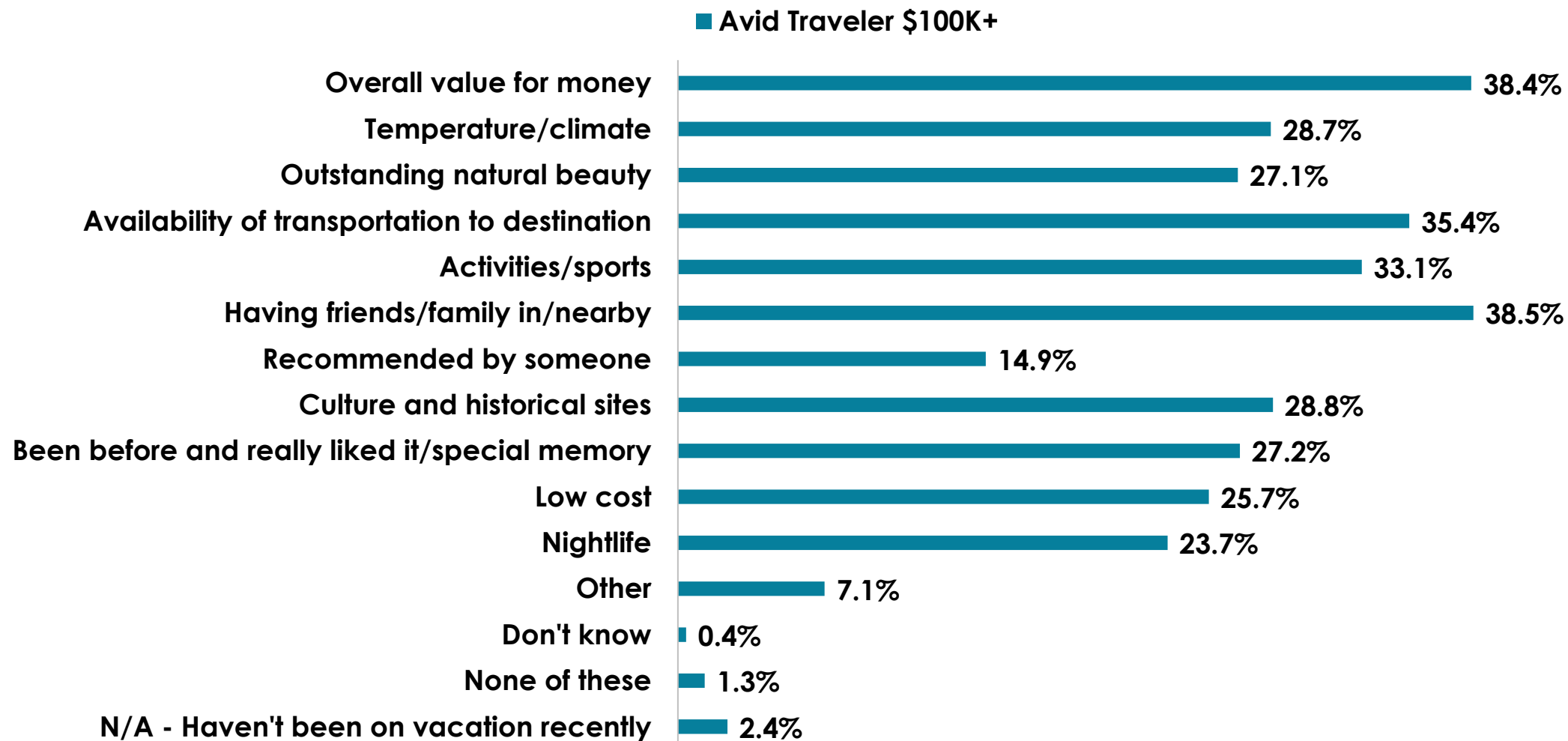


# Reason for choosing most recent leisure destination

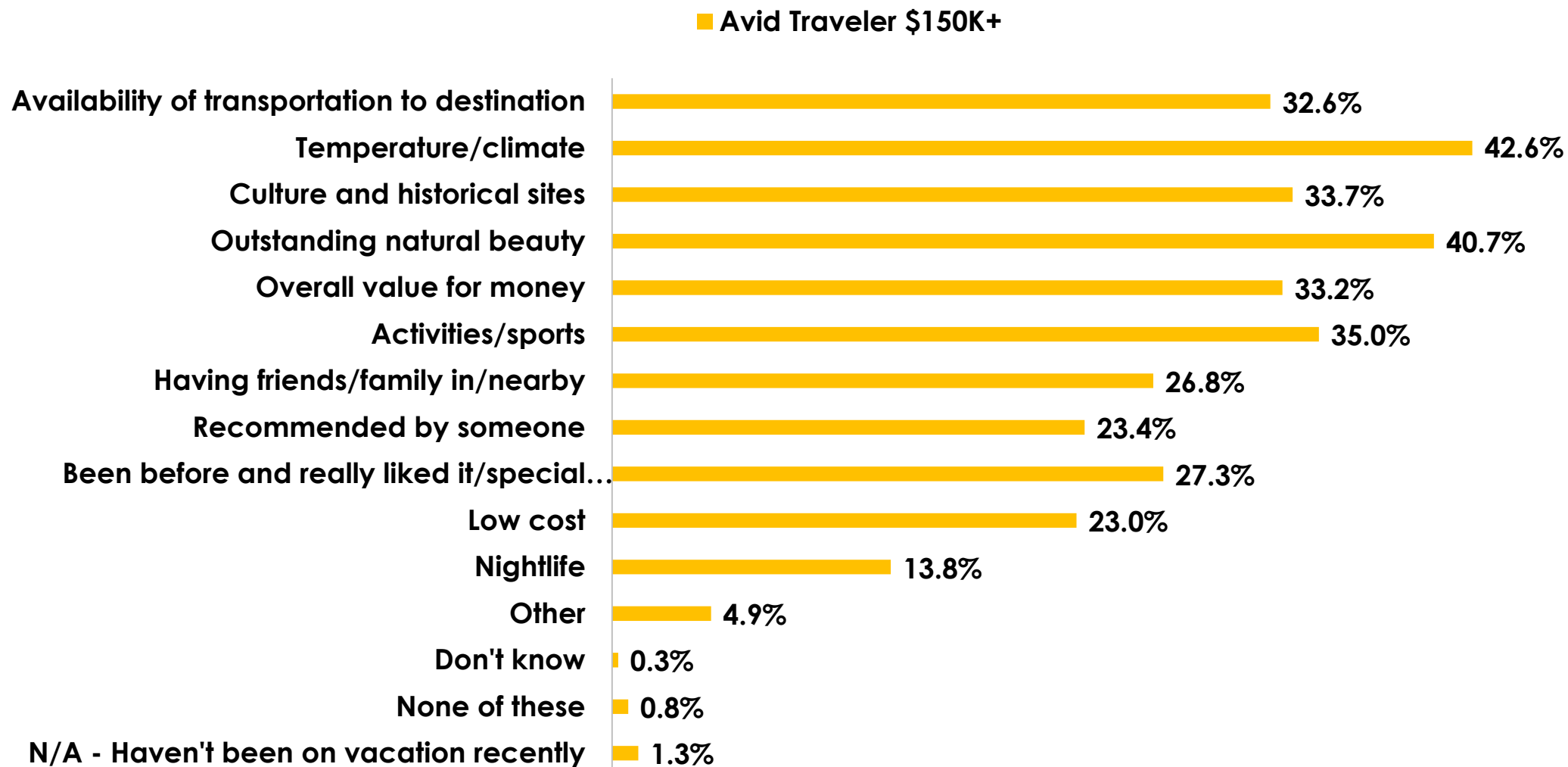
Reasons	Avid Traveler \$100K, 25-54, individual	Avid Traveler \$150K, 25-54, 2+ household	Long-Distance Air Traveler under 55	Nat Rep
The temperature/climate	38.4%	42.6%	37.0%	23.8%
Availability of transportation to destination	28.7%	32.6%	35.2%	14.0%
Culture and historical sites	27.1%	33.7%	30.2%	18.1%
Overall value for money	35.4%	33.2%	32.1%	30.4%
Activities/sports	33.1%	35.0%	32.3%	16.1%
Outstanding natural beauty	38.5%	40.7%	31.2%	23.9%
Nightlife	14.9%	13.8%	25.5%	8.1%
Having friends/family in/nearby	28.8%	26.8%	34.8%	24.4%
Low cost	27.2%	23.0%	31.0%	22.8%
Been before and really liked it/special memory	25.7%	27.3%	30.1%	18.8%
Recommended by someone	23.7%	23.4%	29.6%	13.5%
Other	7.1%	4.9%	4.5%	6.3%
Don't know	0.4%	0.3%	0.0%	2.2%
None of these	1.3%	0.8%	0.5%	2.3%
N/A - Haven't been on vacation recently	2.4%	1.3%	2.8%	24.3%



# Reason for choosing most recent leisure destination

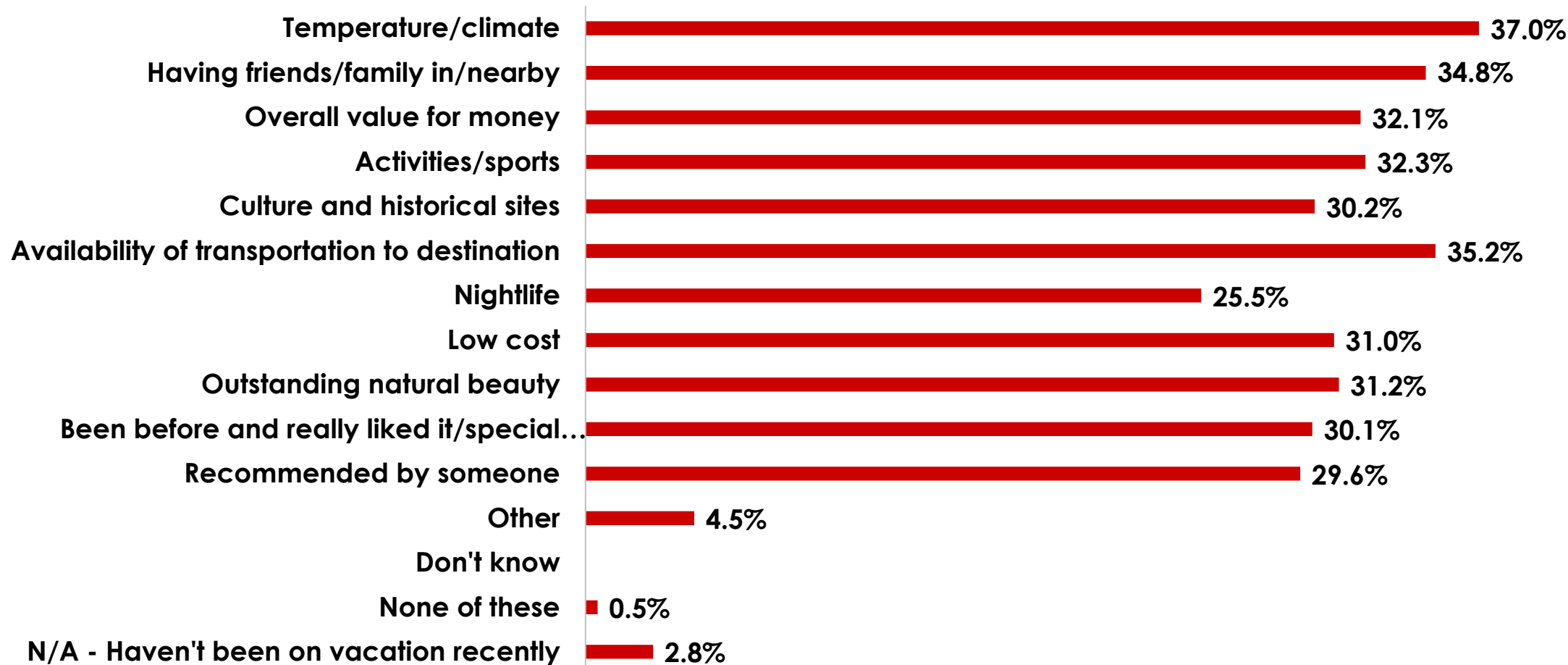


# Reason for choosing most recent leisure destination

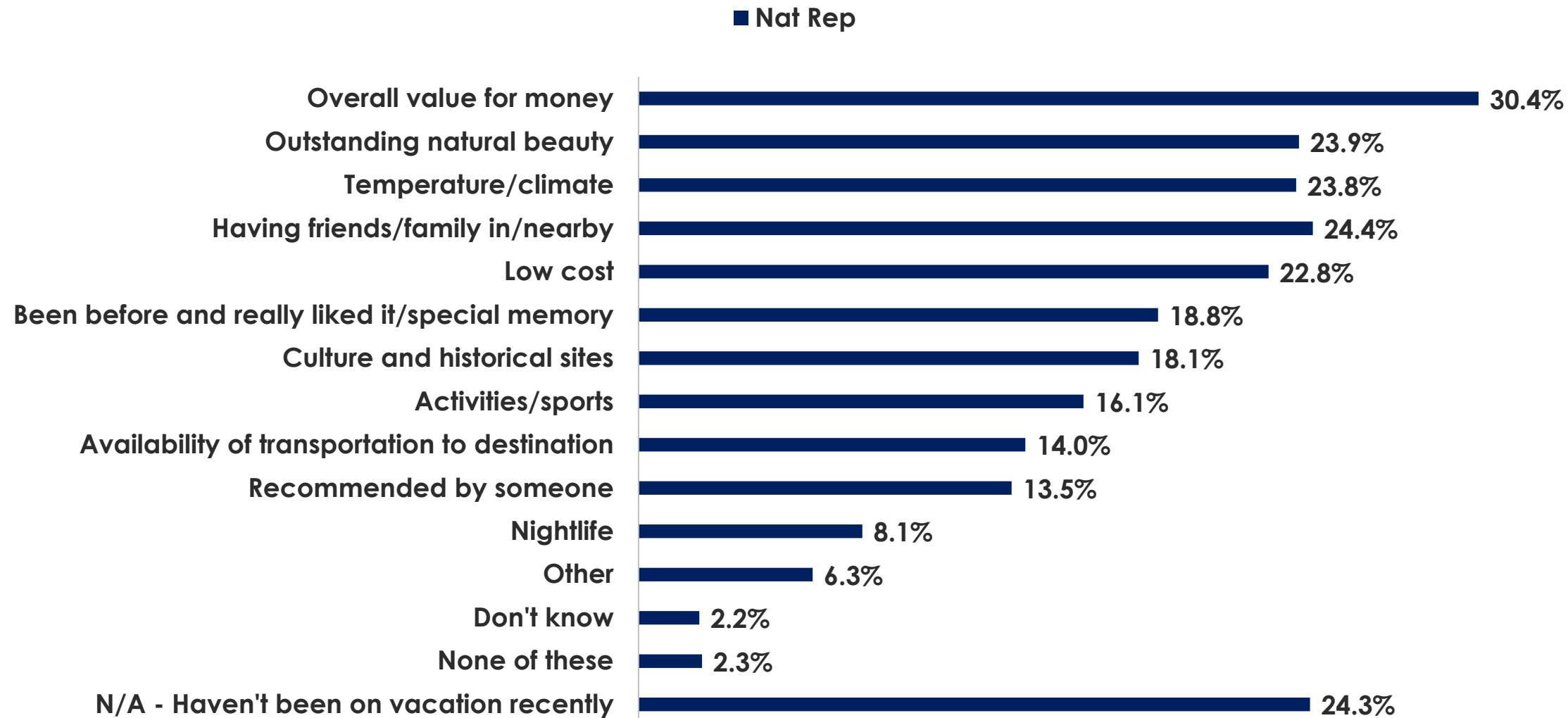


# Reason for choosing most recent leisure destination

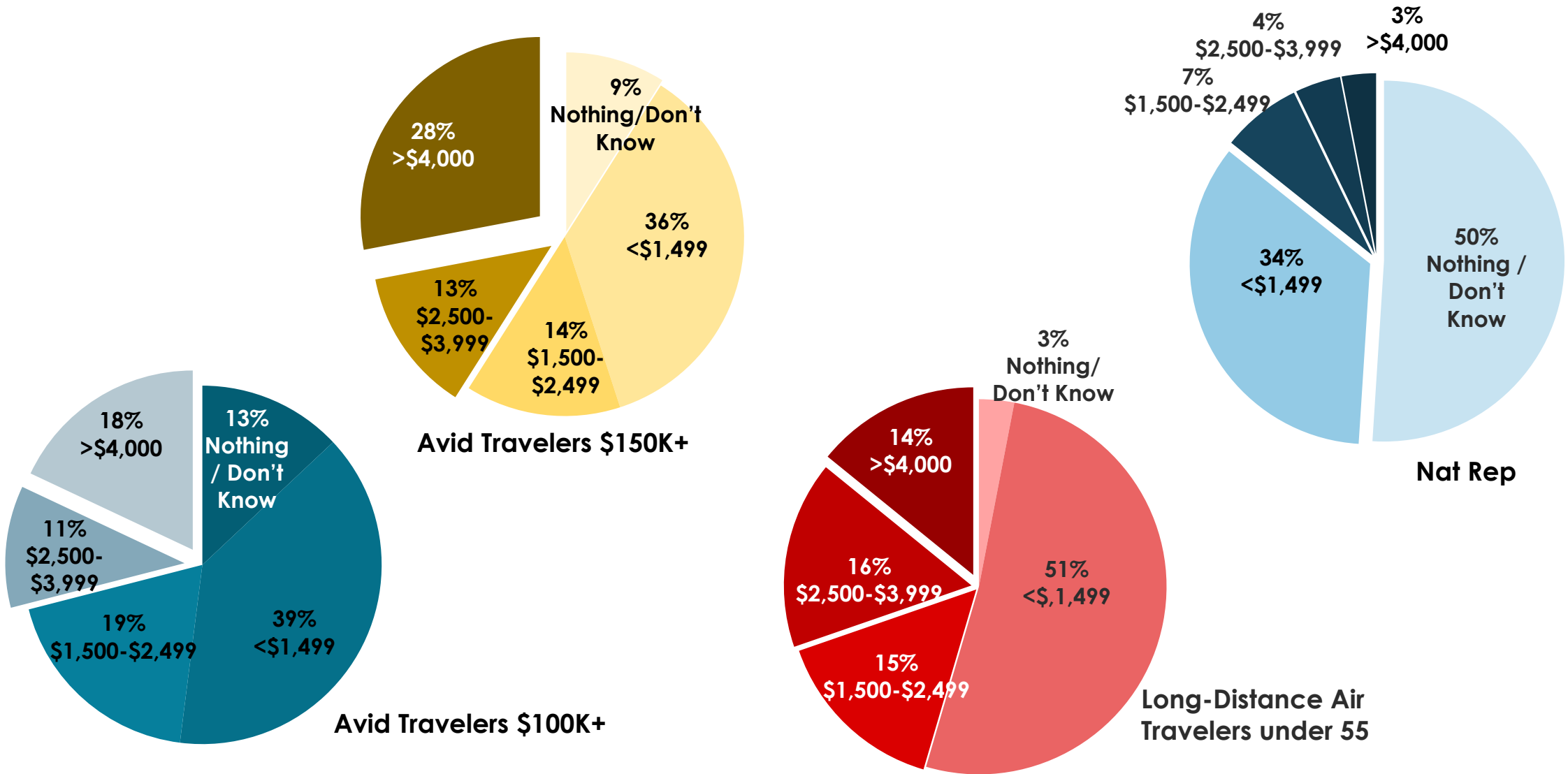
■ Long-Distance Air Traveler under 55



# Reason for choosing most recent leisure destination



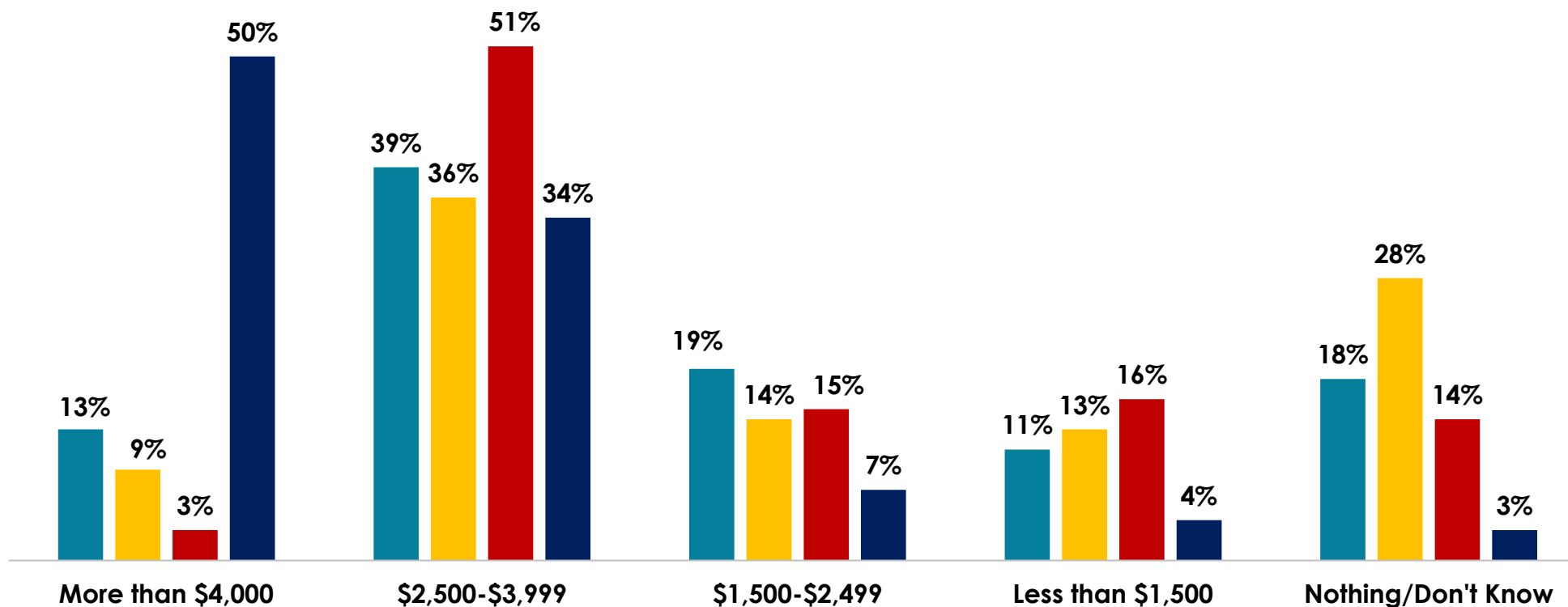
# Most recent leisure trip - total spend



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

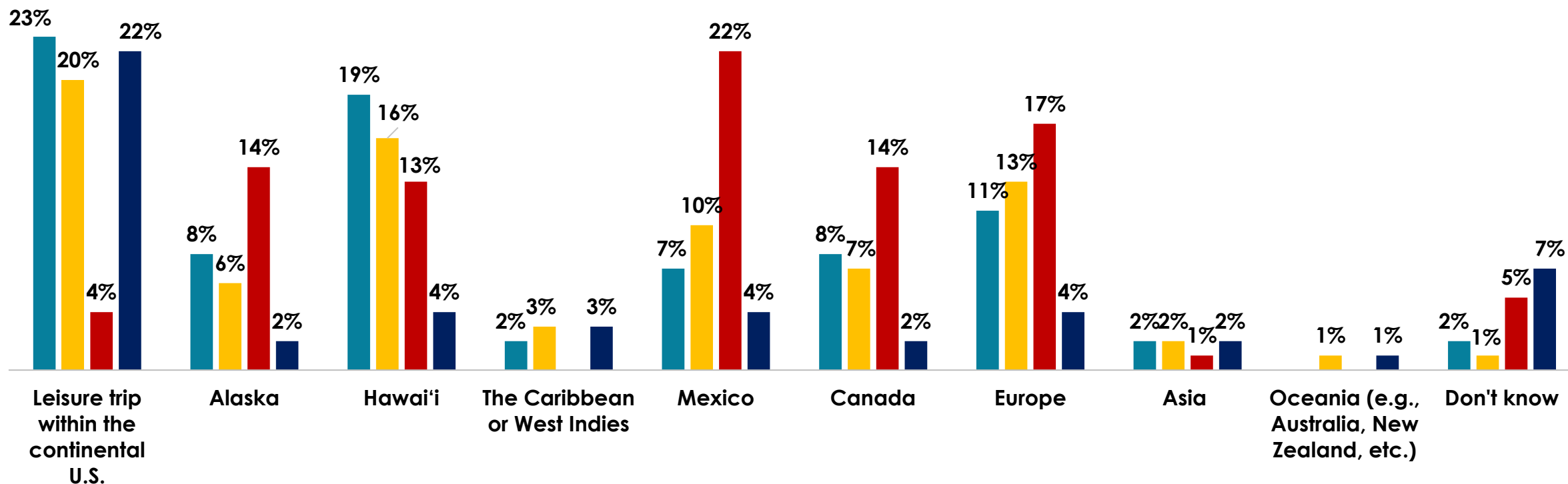
# Most recent leisure trip - total spend

■ Avid Traveler \$100K+   
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 ■ Long-Distance Air Traveler under 55   
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# Leisure trip - next destination

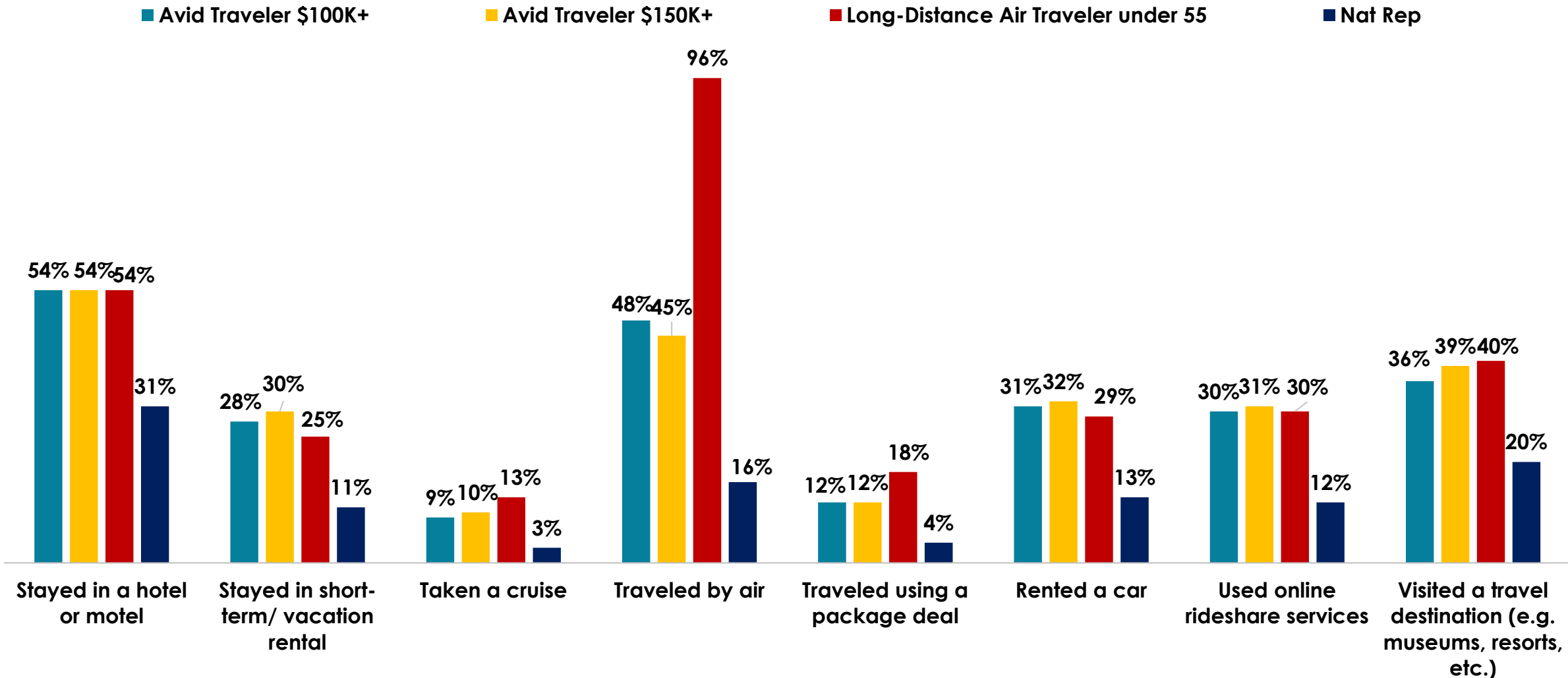
■ Avid Traveler \$100K+     
 ■ Avid Traveler \$150K+\*     
 ■ Long-Distance Air Traveler under 55\*     
 ■ Nat Rep



\*YouGov sample size <100

Source: HVCB analysis of YouGov data provided by HTA as of January 9, 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

