

COVID-19 Impact on U.S. Avid Travelers

An HVCB analysis of YouGov data provided by HTA as of July 17, 2022

Reported on July 21, 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)

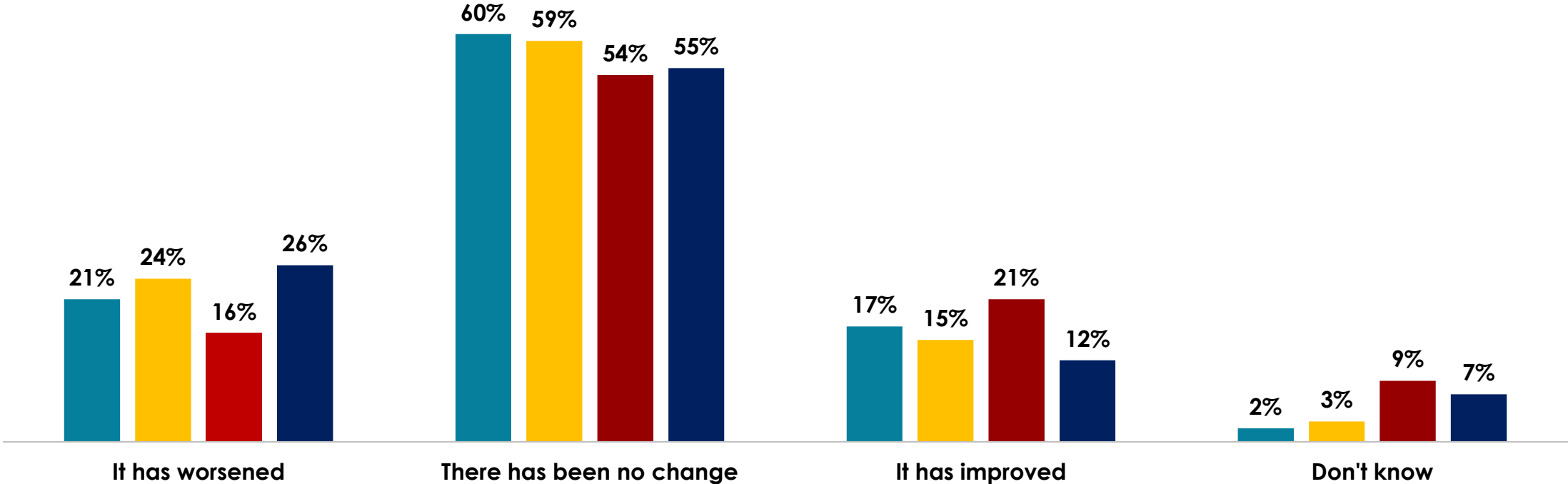
- Representative of U.S. adults in terms of age, gender, social class and education



Travelers' Pandemic Outlook

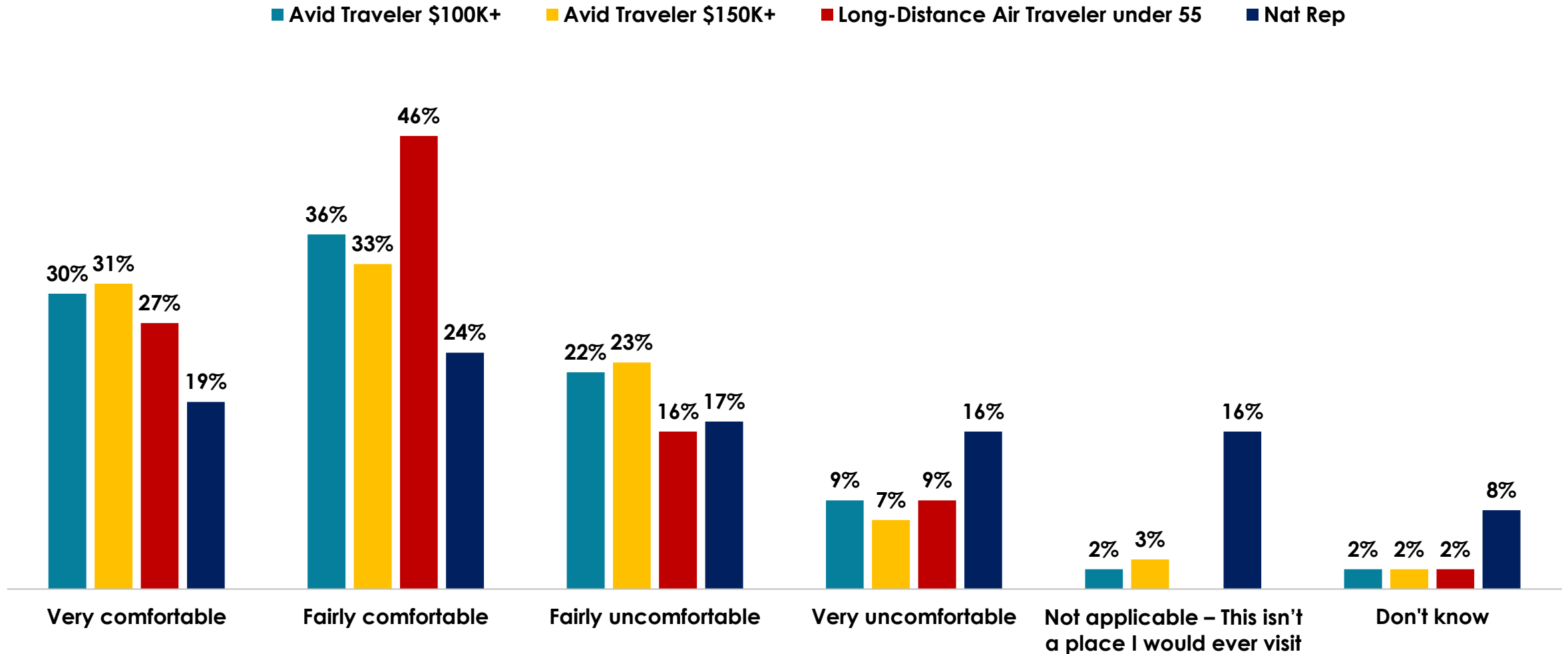
How has your household economic situation changed in the past month?

■ 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 July 17, 2022

Level of comfort visiting an airport right now

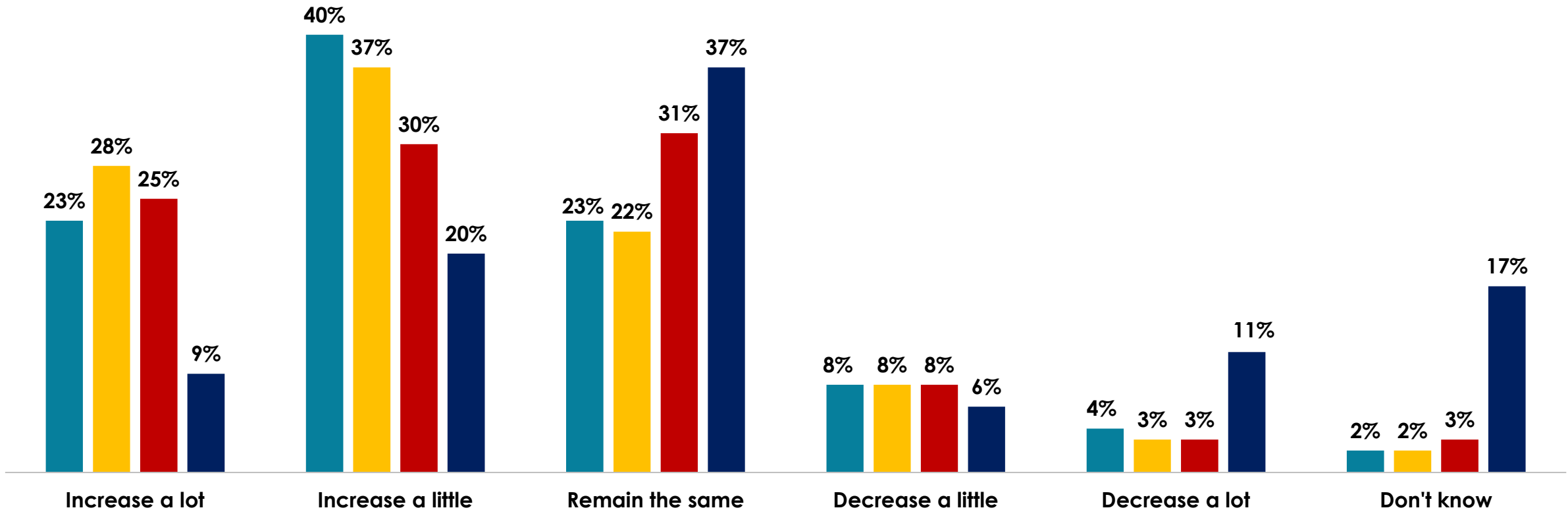




Future Travel Plans

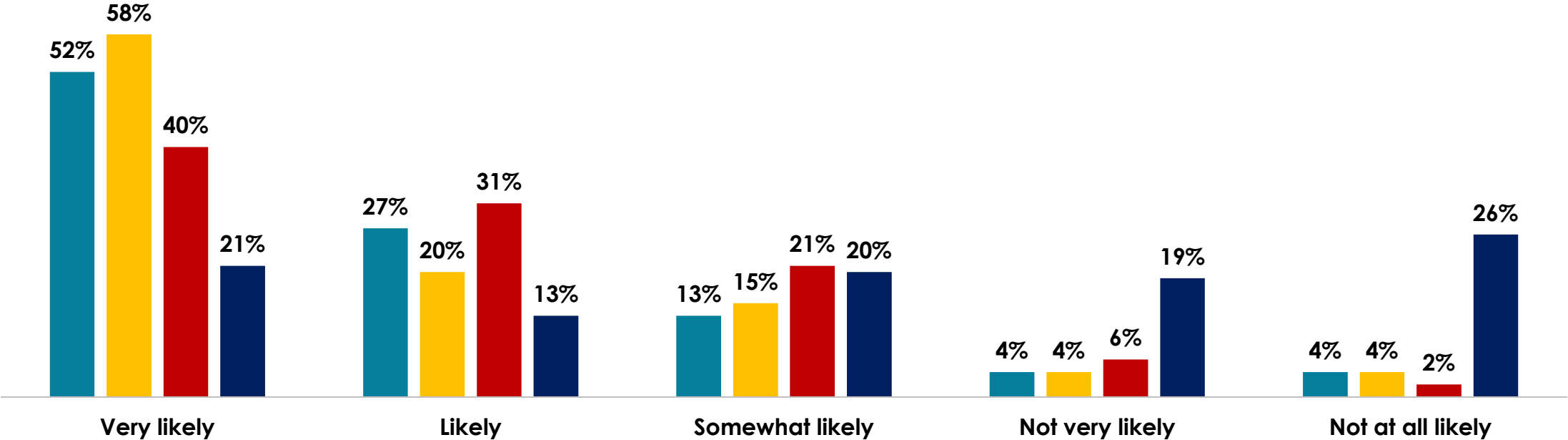
Future Travel – Expected change to air travel in the next 12 months

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



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

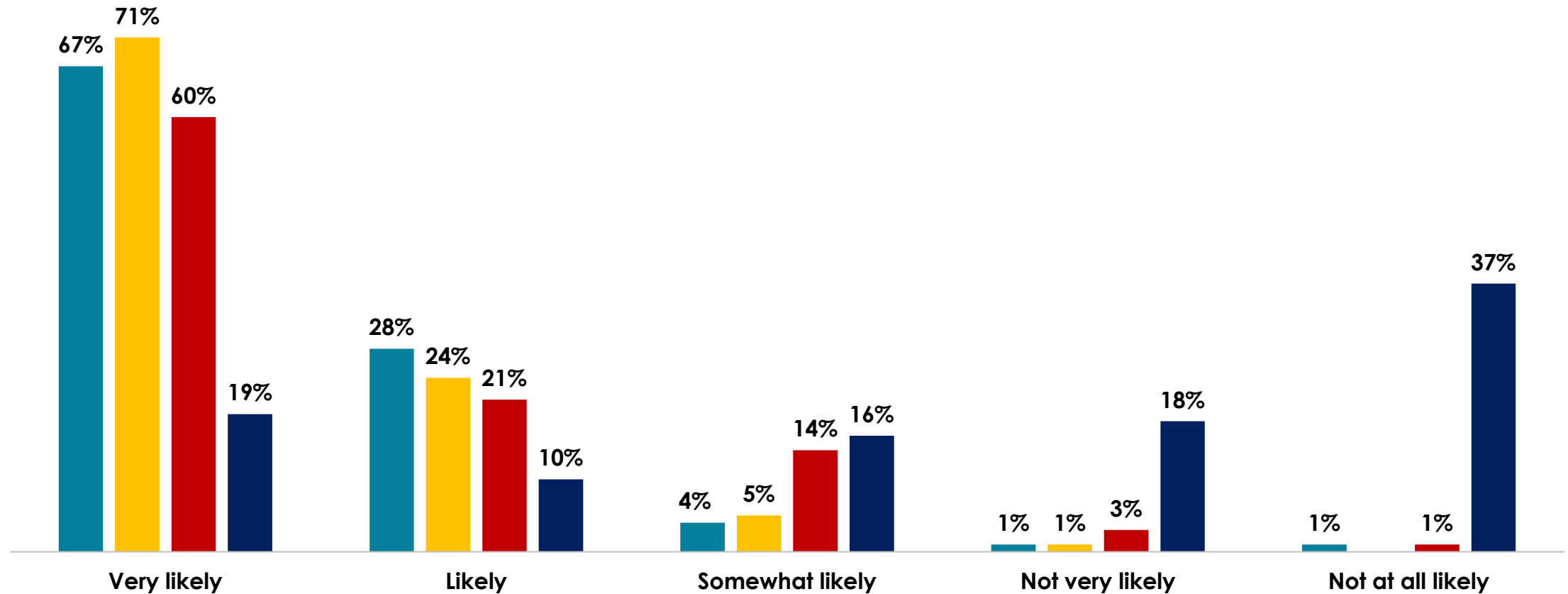
■ Avid Traveler \$100K+ ■ Avid Traveler \$150K+ ■ Long-Distance Air Traveler under 55 ■ Nat Rep



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

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



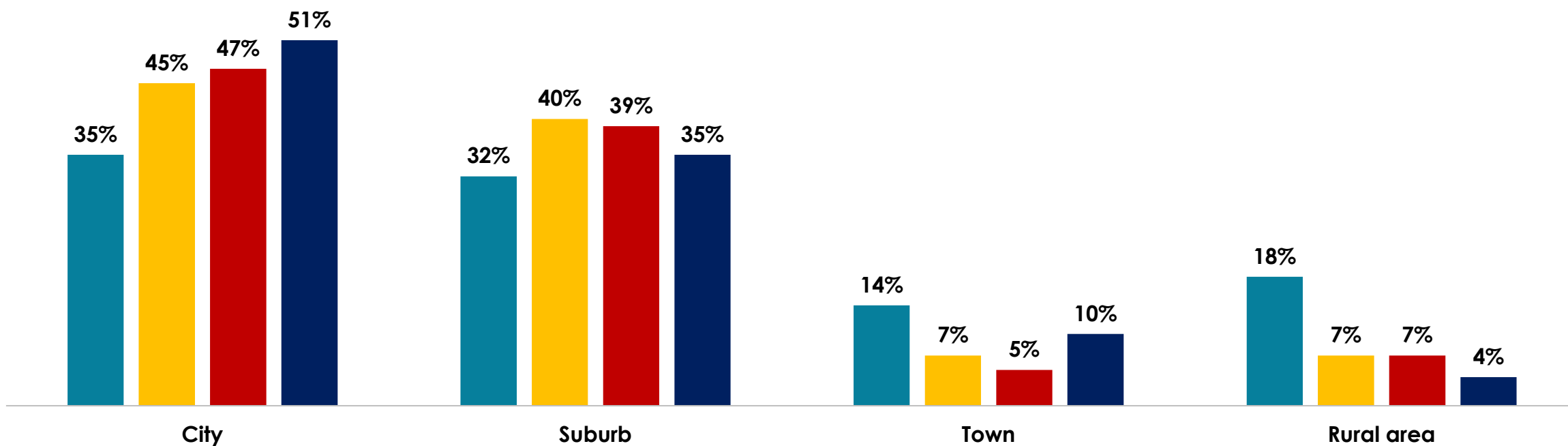


Traveler Profiles

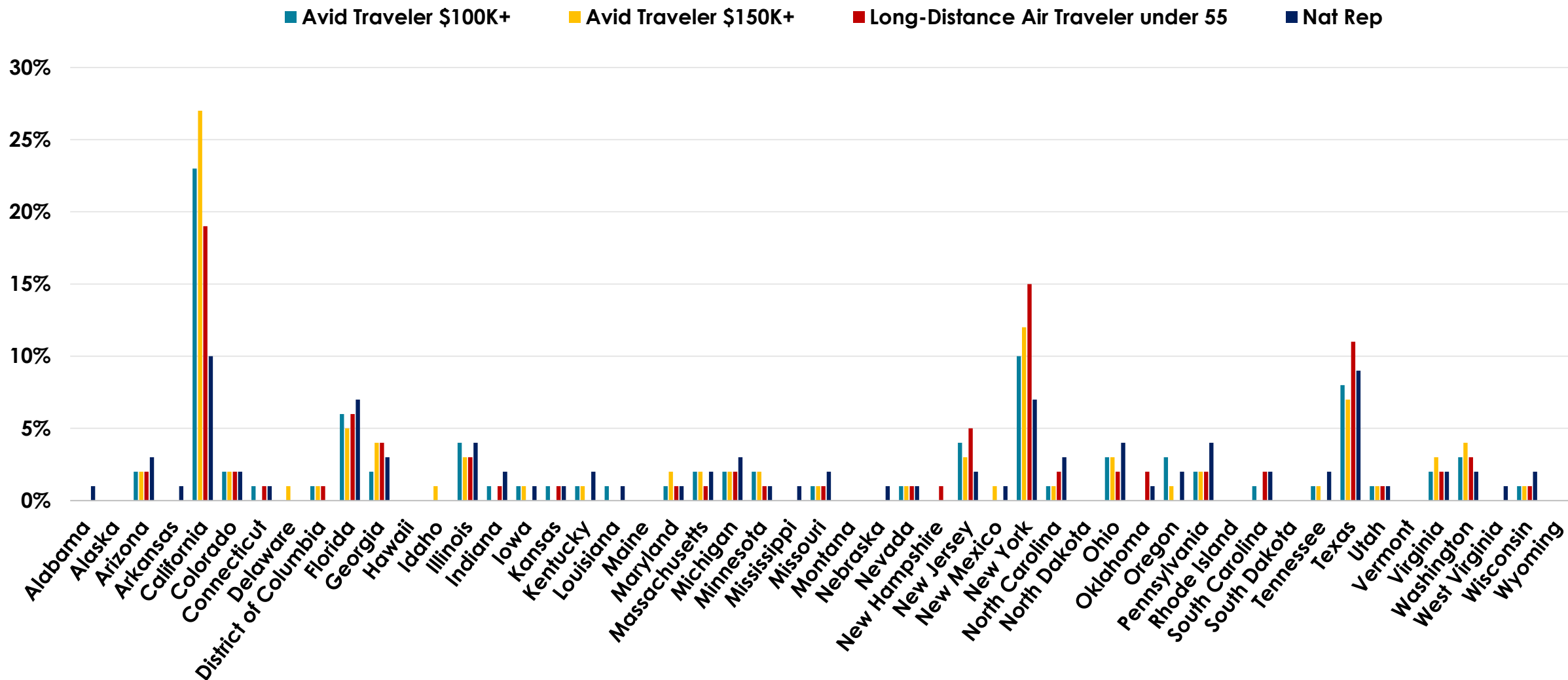
Avid Travelers vs. Long-Distance Air Travelers vs. Nat. Rep.

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	22.6%
New York	10.5%
Texas	8.2%
Florida	6.0%
New Jersey	3.6%
Illinois	3.5%
Washington	3.3%
Oregon	3.2%
Ohio	3.0%
Virginia	2.4%

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

California	27.0%
New York	12.2%
Texas	7.5%
Florida	5.2%
Washington	3.9%
Georgia	3.6%
New Jersey	3.3%
Illinois	2.8%
Ohio	2.7%
Virginia	2.5%

Long-Distance Air Traveler under 55

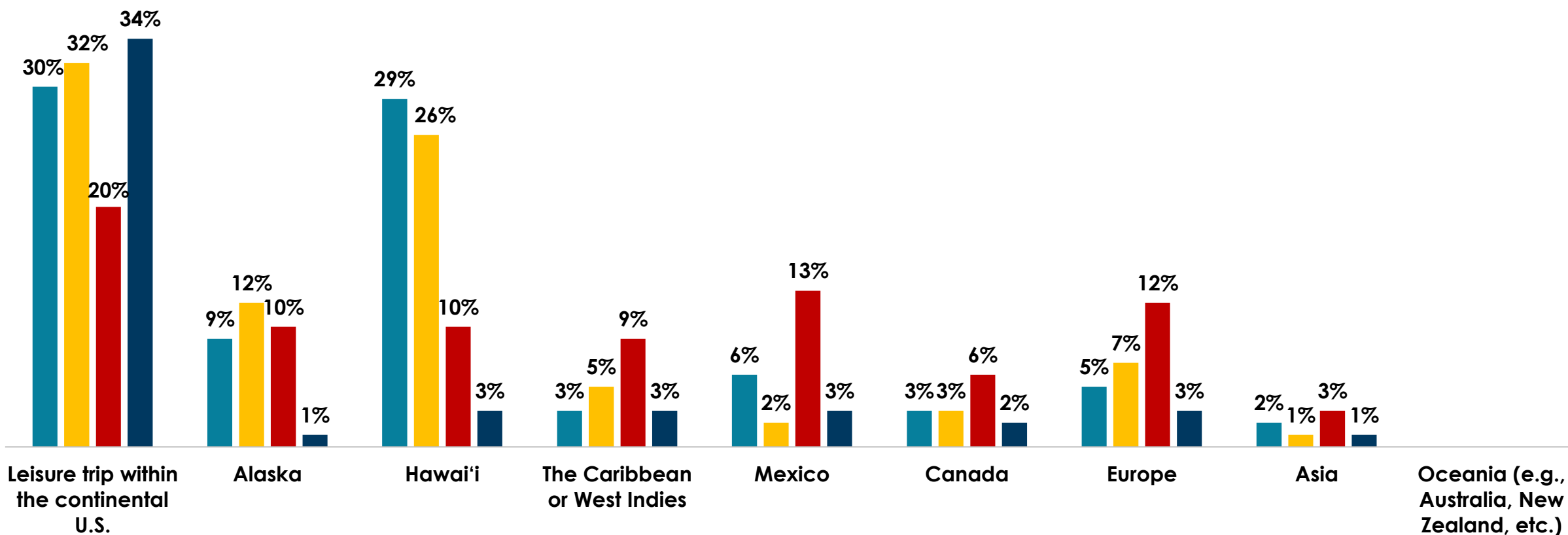
California	19.5%
New York	14.9%
Texas	11.0%
Florida	6.1%
New Jersey	5.0%
Georgia	4.4%
Washington	3.4%
Illinois	2.5%
Ohio	2.1%
Michigan	2.1%

Nat Rep

California	9.8%
Texas	8.9%
Florida	7.2%
New York	7.1%
Pennsylvania	4.2%
Ohio	3.9%
Illinois	3.5%
Georgia	3.0%
Arizona	2.9%
Michigan	2.8%

Leisure trip – most recent destination

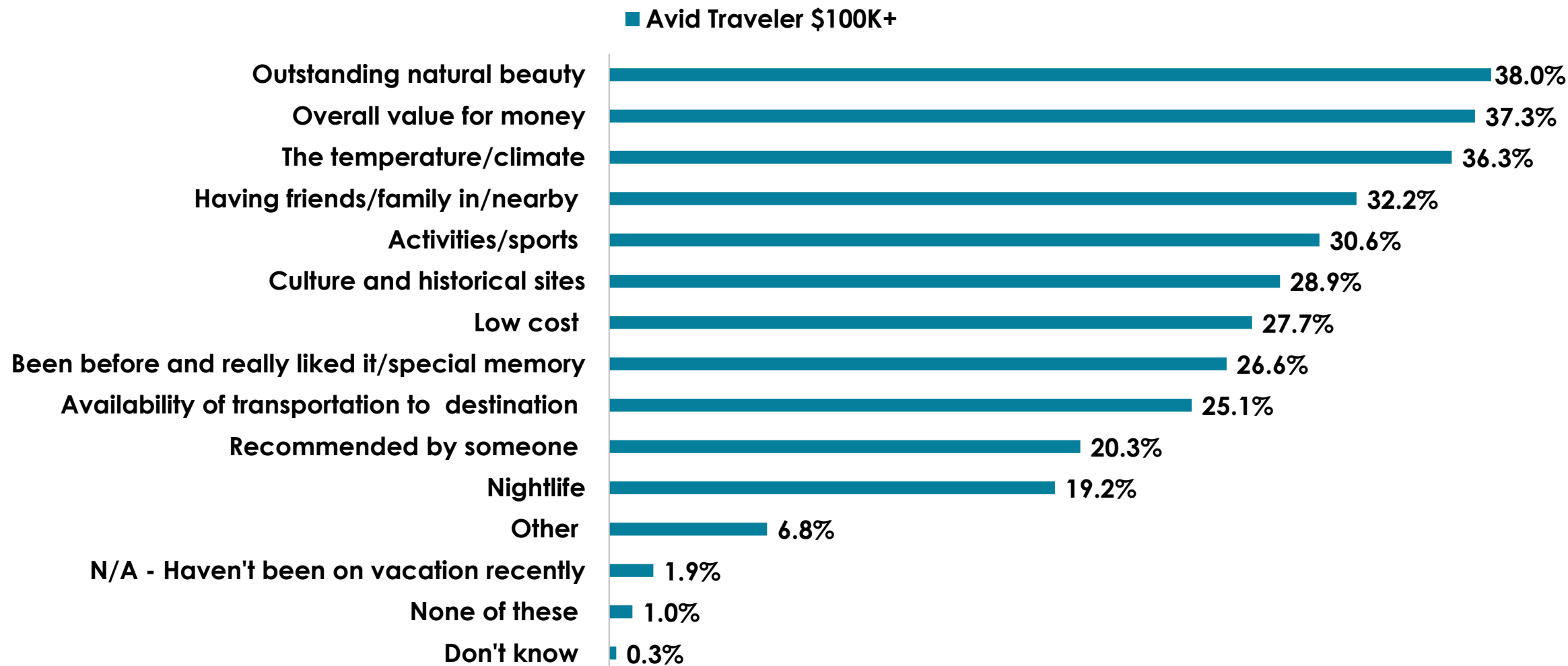
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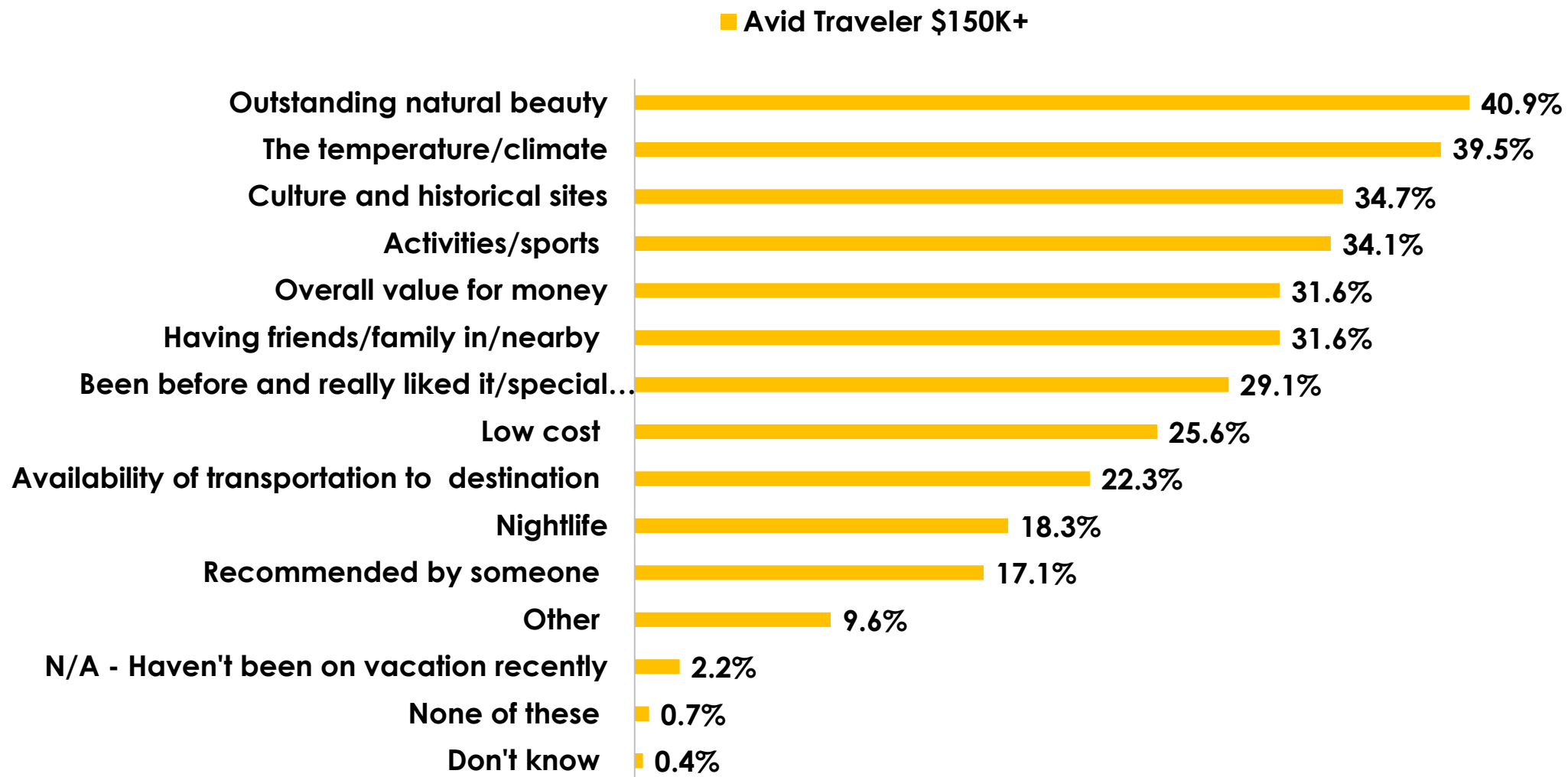
Reason for choosing most recent leisure destination

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	36.3%	39.5%	36.1%	23.6%
Availability of transportation to destination	25.1%	22.3%	30.0%	14.2%
Culture and historical sites	28.9%	34.7%	32.3%	17.9%
Overall value for money	37.3%	31.6%	37.2%	30.7%
Activities/sports	30.6%	34.1%	32.9%	16.7%
Outstanding natural beauty	38.0%	40.9%	38.7%	23.9%
Nightlife	19.2%	18.3%	21.9%	8.8%
Having friends/family in/nearby	32.2%	31.6%	44.9%	25.1%
Low cost	27.7%	25.6%	31.6%	23.8%
Been before and really liked it/special memory	26.6%	29.1%	27.7%	19.2%
Recommended by someone	20.3%	17.1%	37.0%	14.3%
Other	6.8%	9.6%	8.5%	6.4%
Don't know	0.3%	0.4%	2.2%	2.0%
None of these	1.0%	0.7%	2.3%	2.5%
N/A - Haven't been on vacation recently	1.9%	2.2%	2.7%	23.6%

Reason for choosing most recent leisure destination

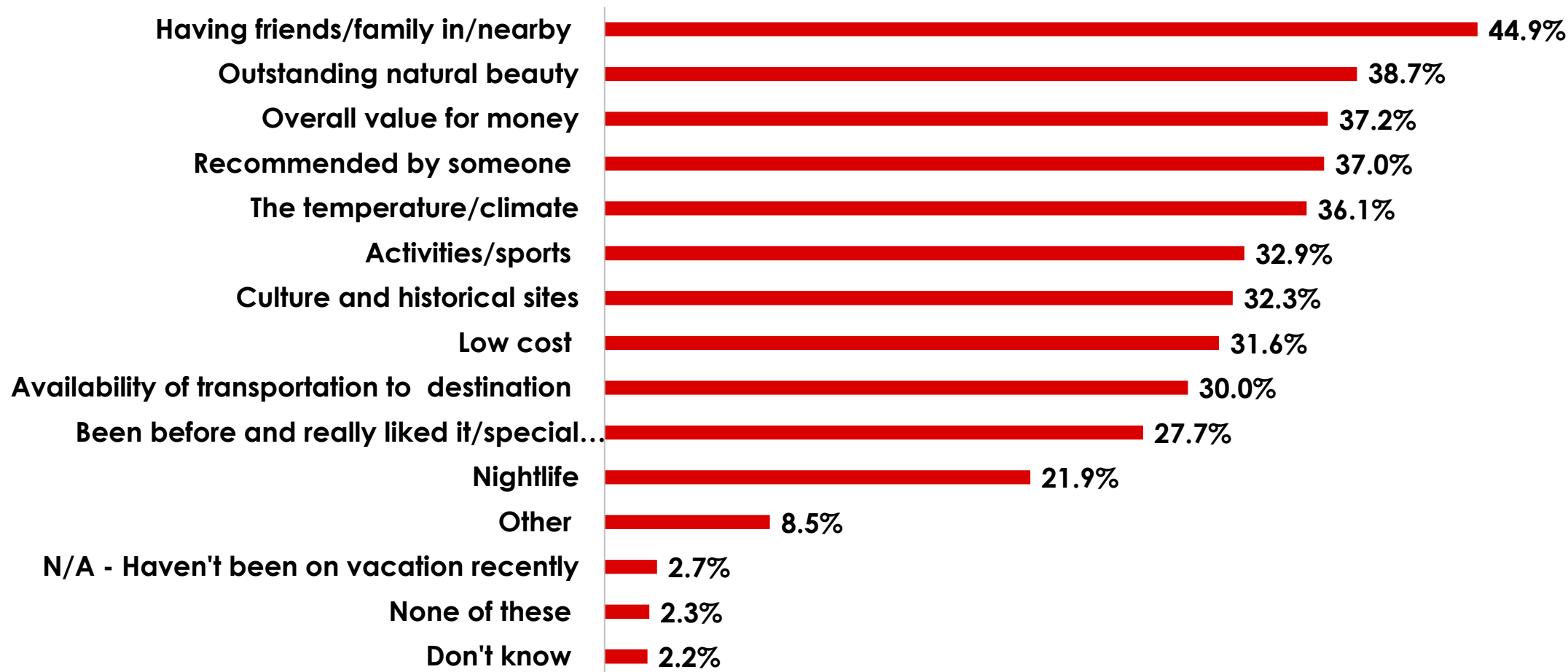


Reason for choosing most recent leisure destination

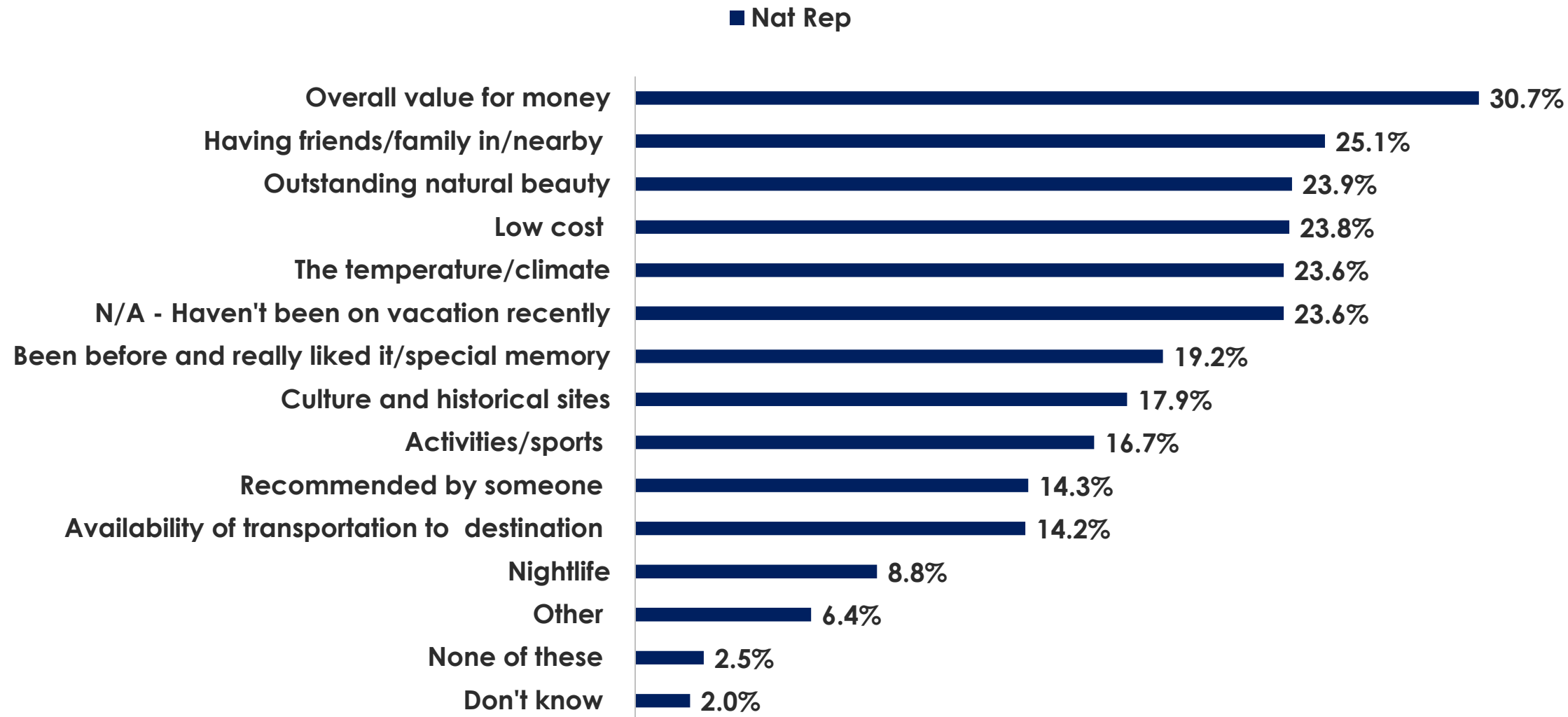


Reason for choosing most recent leisure destination

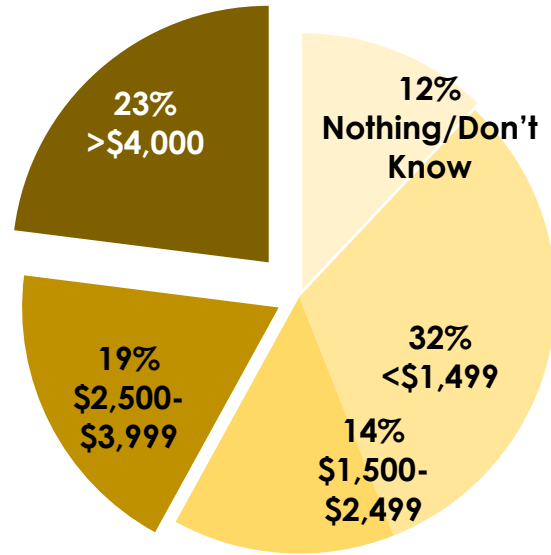
■ Long Distance Air Traveler under 55



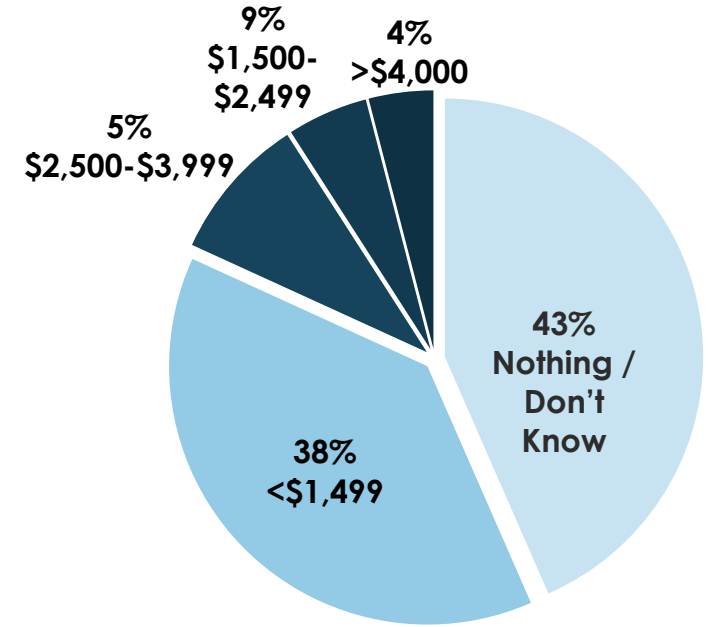
Reason for choosing most recent leisure destination



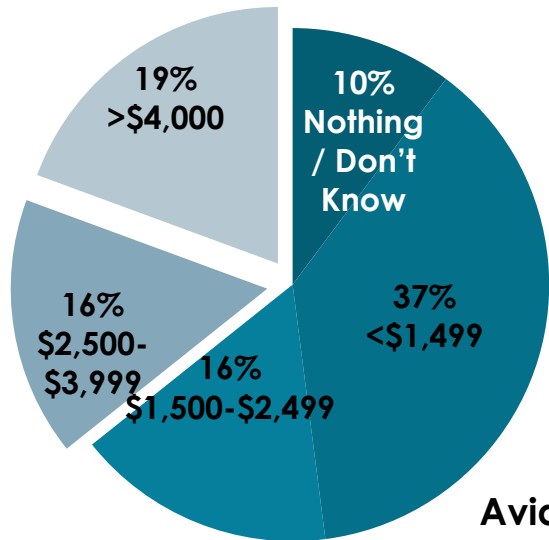
Most recent leisure trip - total spend



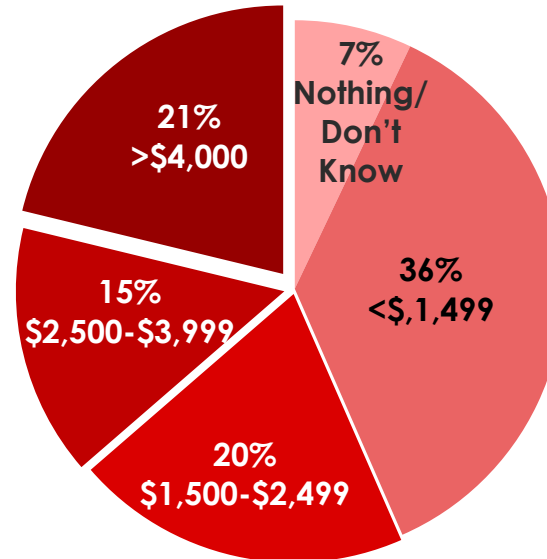
Avid Travelers \$150K+



Nat Rep



Avid Travelers \$100K+

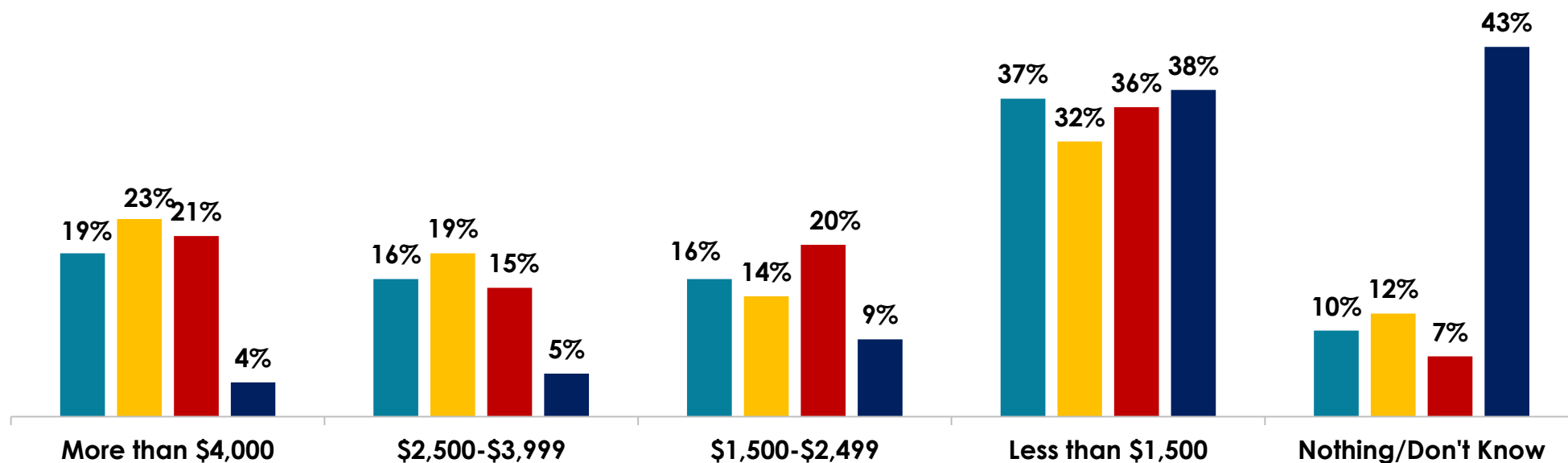


Long-Distance Air Travelers under 55

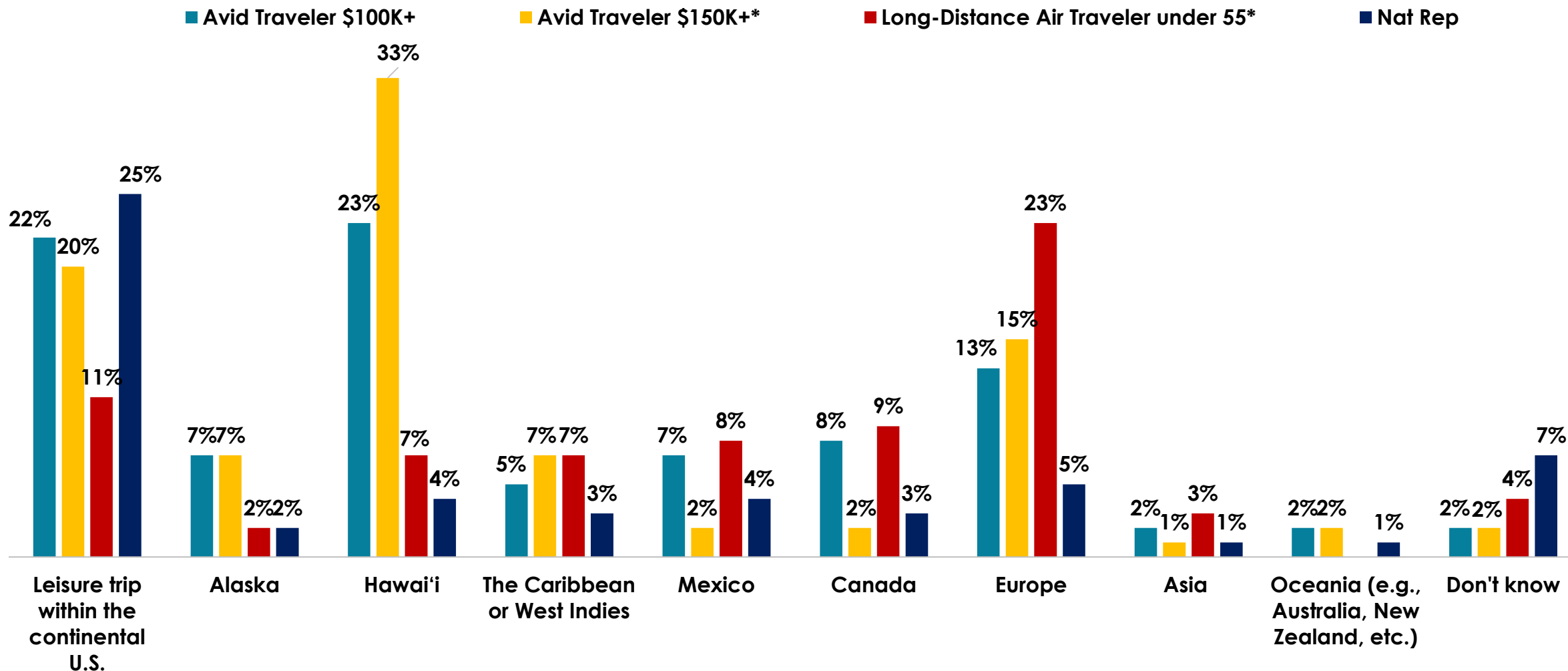
Based on Hawai'i Tourism Authority data, the average U.S. per person per trip spend for 2019 was \$1,693.32.

Most recent leisure trip - total spend

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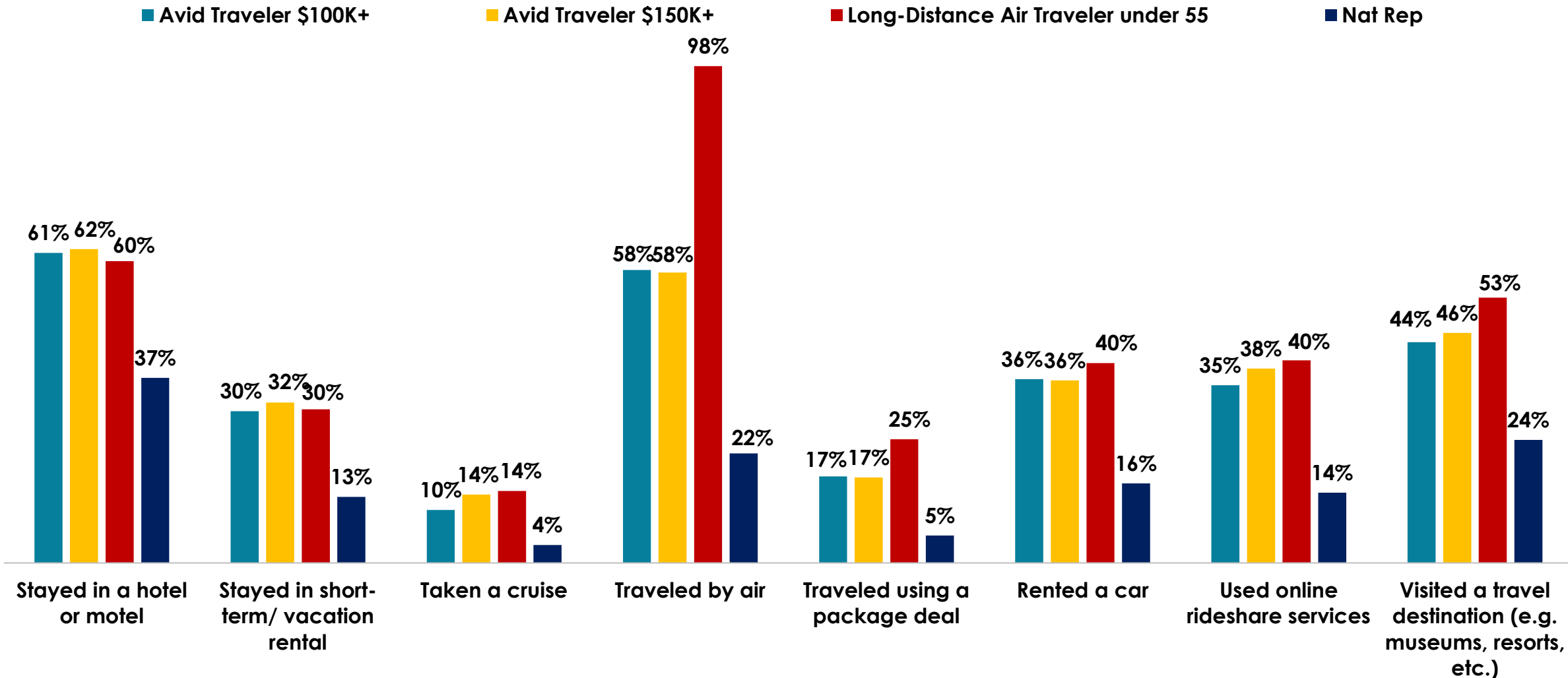
Leisure trip - next destination



*YouGov sample size <100

Source: HVCB analysis of YouGov data provided by HTA as of July 17, 2022

Leisure trip - activities in last 12 months



Travel Mindset

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 ■ Avid Traveler \$150K+
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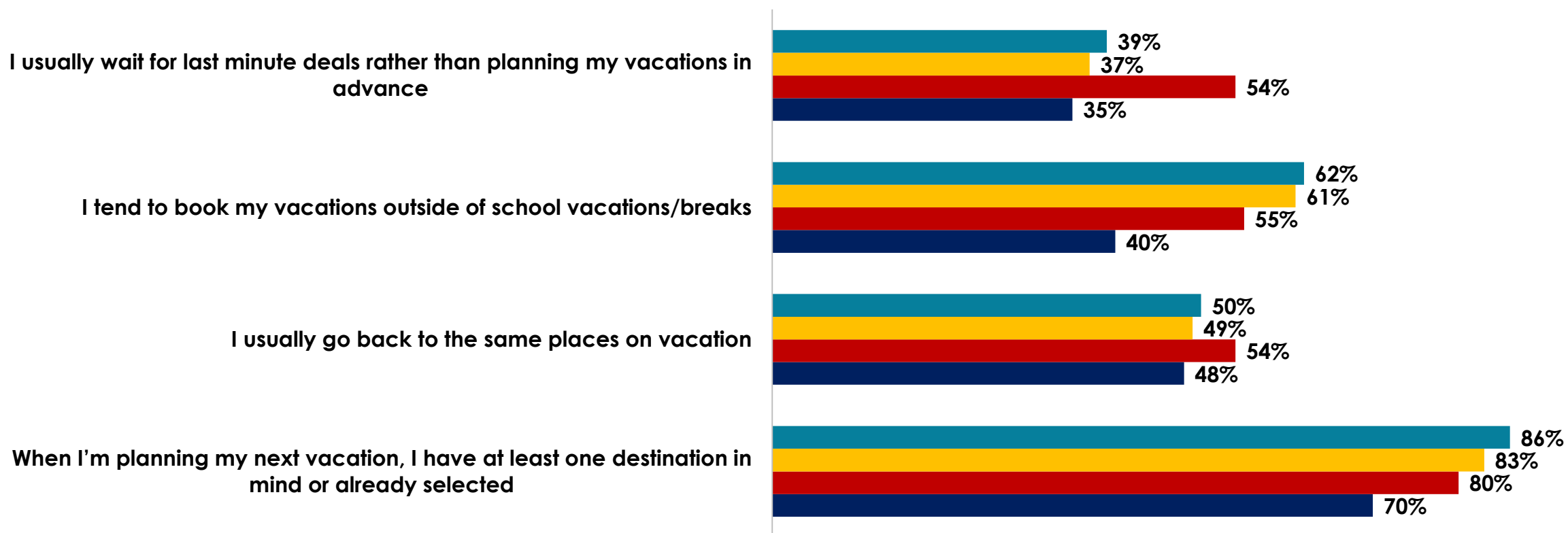
Travel Activities

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Booking & Spending Attitudes

■ Avid Traveler \$100K+
 ■ Avid Traveler \$150K+
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Booking & Spending Attitudes

