

COVID-19 Impact on U.S. Avid Travelers

An HVCB analysis of YouGov data provided by HTA as of June 5, 2022

Reported on June 16, 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)

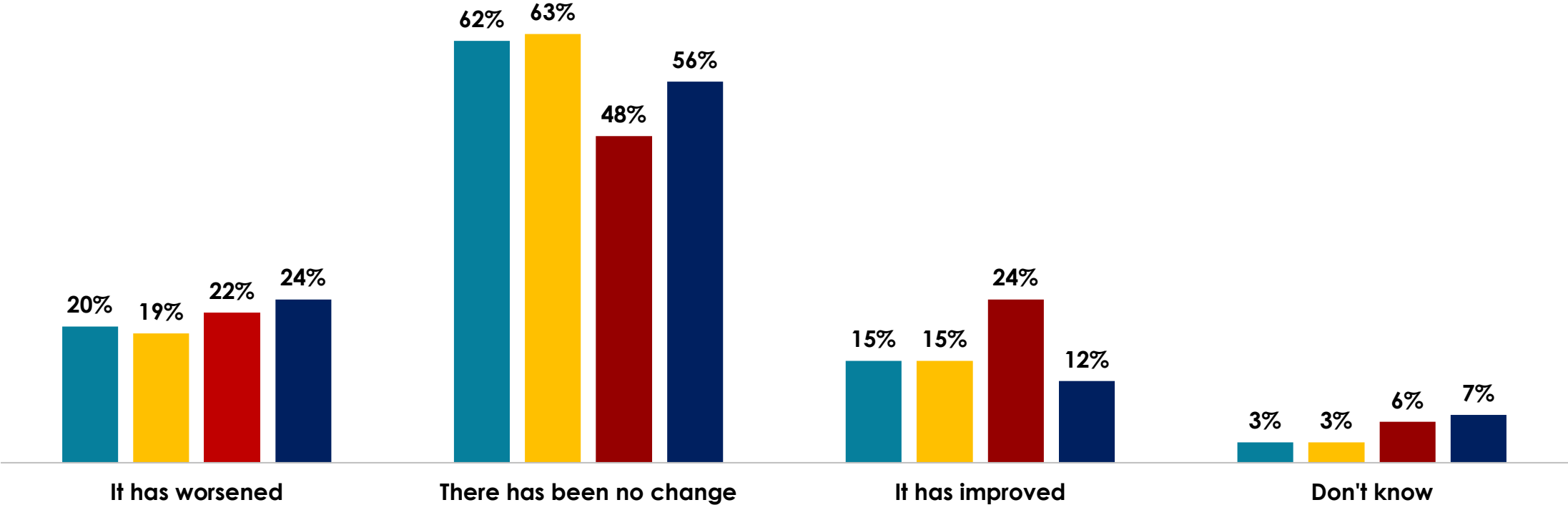
- Representative of U.S. adults in terms of age, gender, social class and education



Travelers' Pandemic Outlook

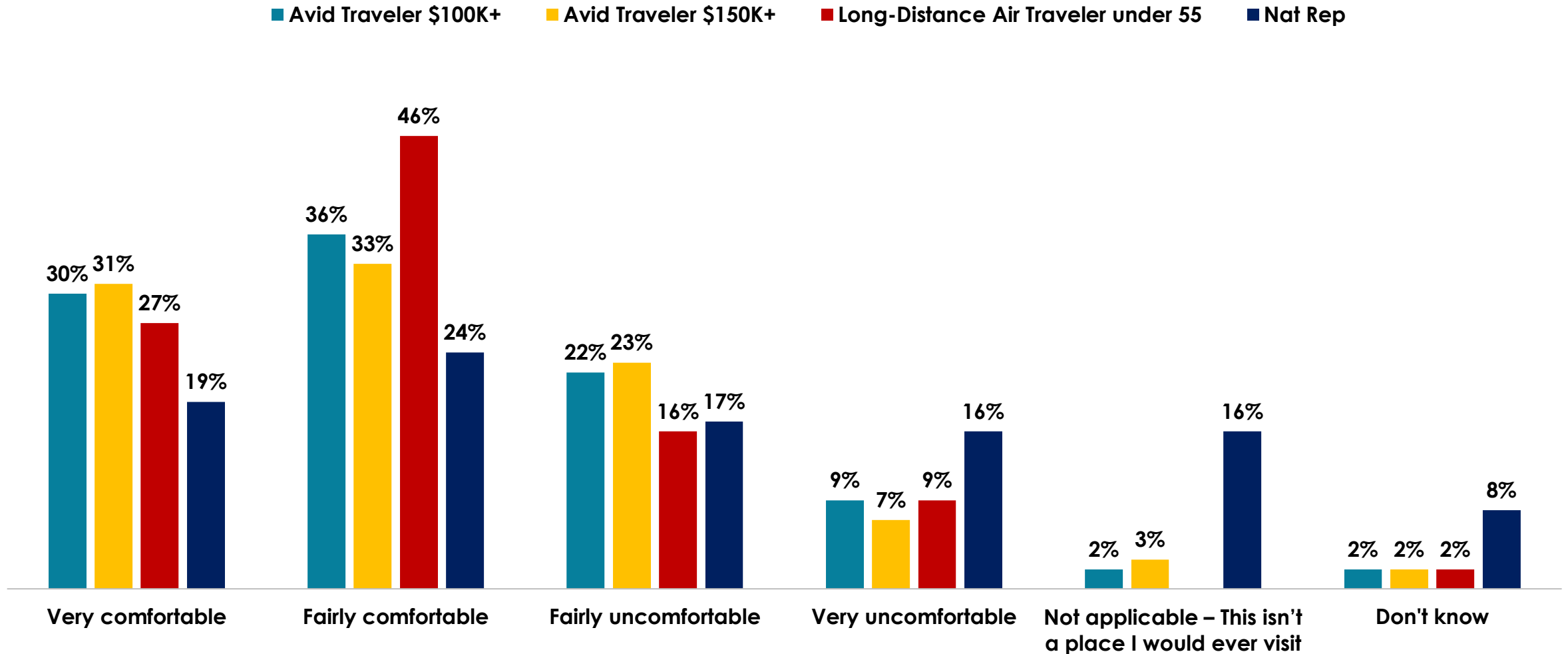
How has your household economic situation changed in the past month?

■ 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 June 5, 2022

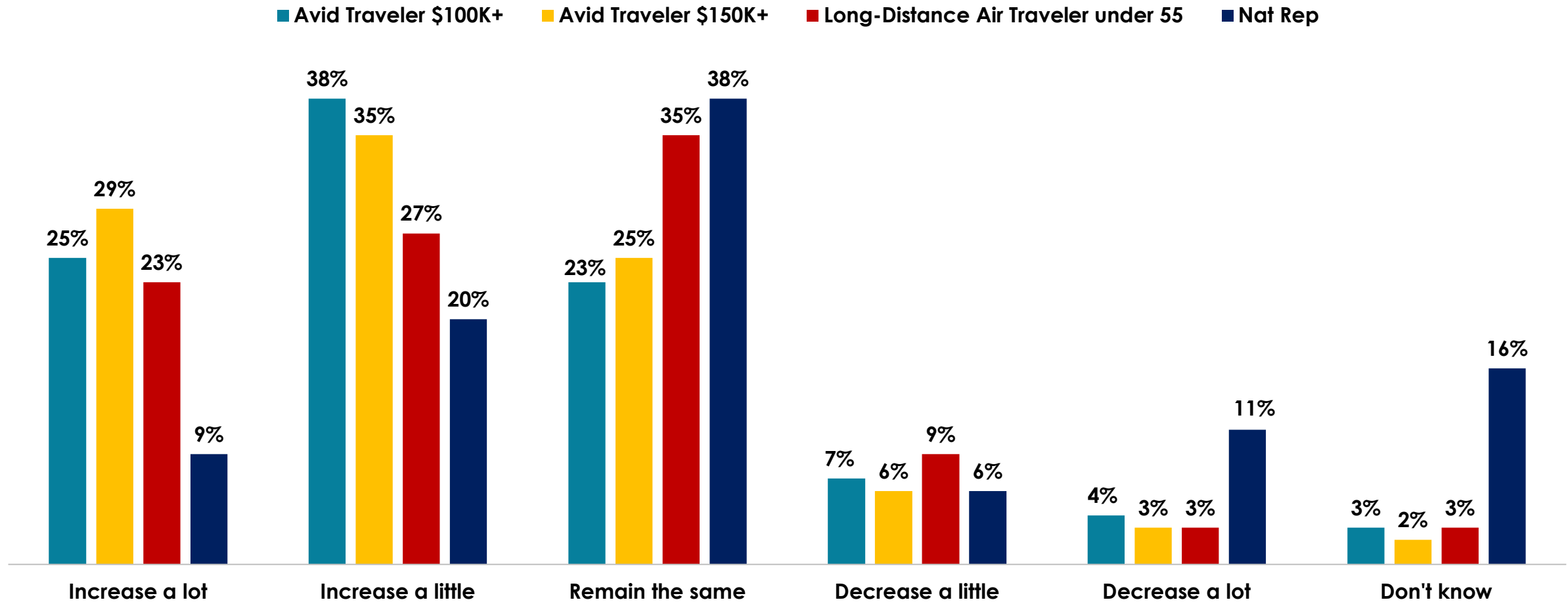
Level of comfort visiting an airport right now





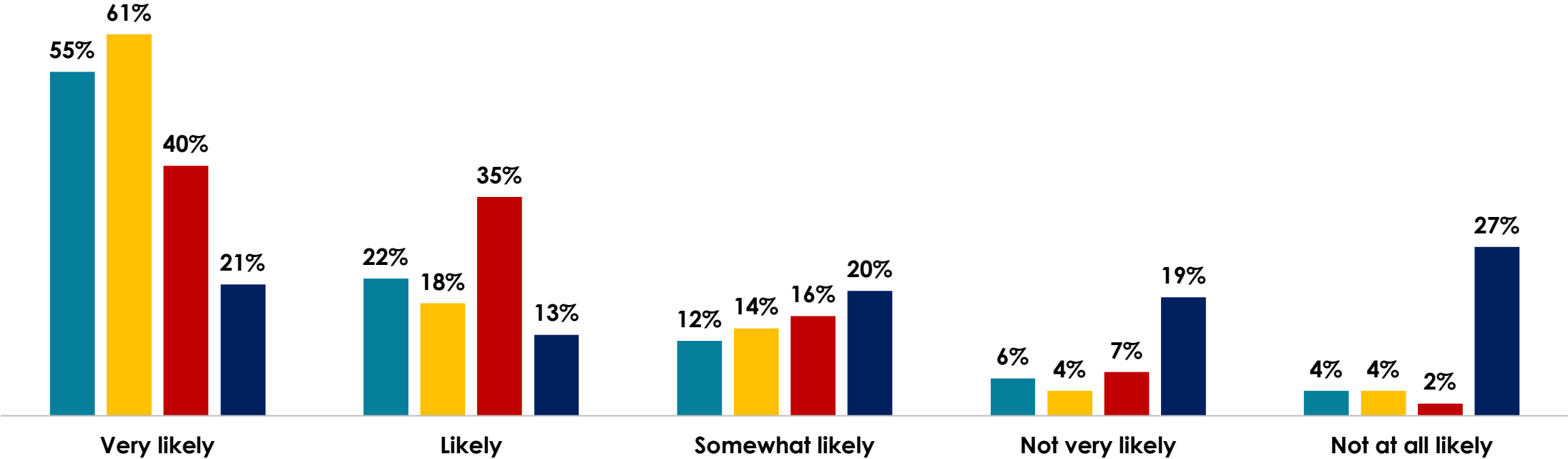
Future Travel Plans

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



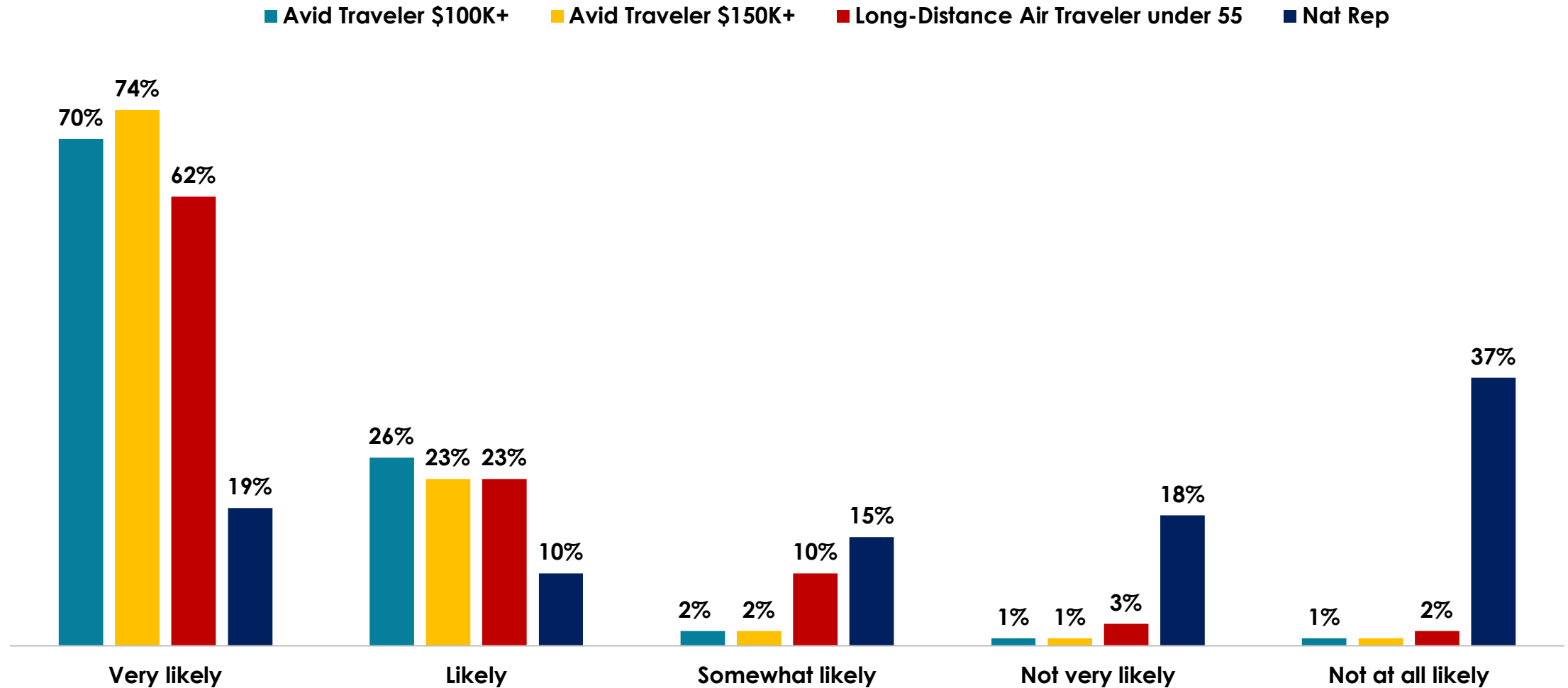
Future Travel – Likelihood of purchasing travel or leisure services in the next 12 months

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



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



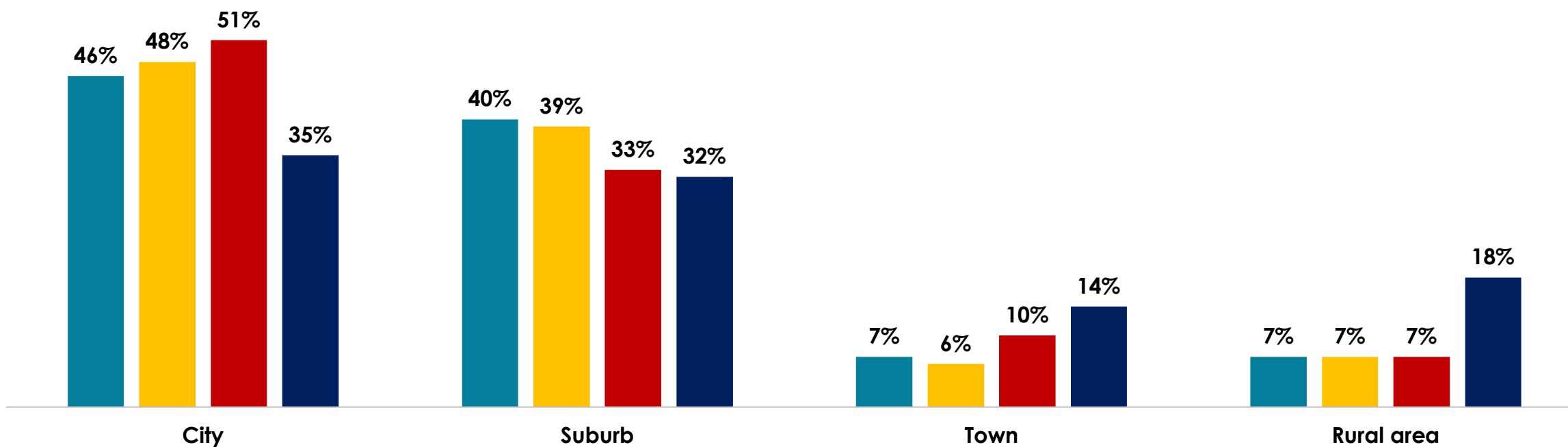


Traveler Profiles

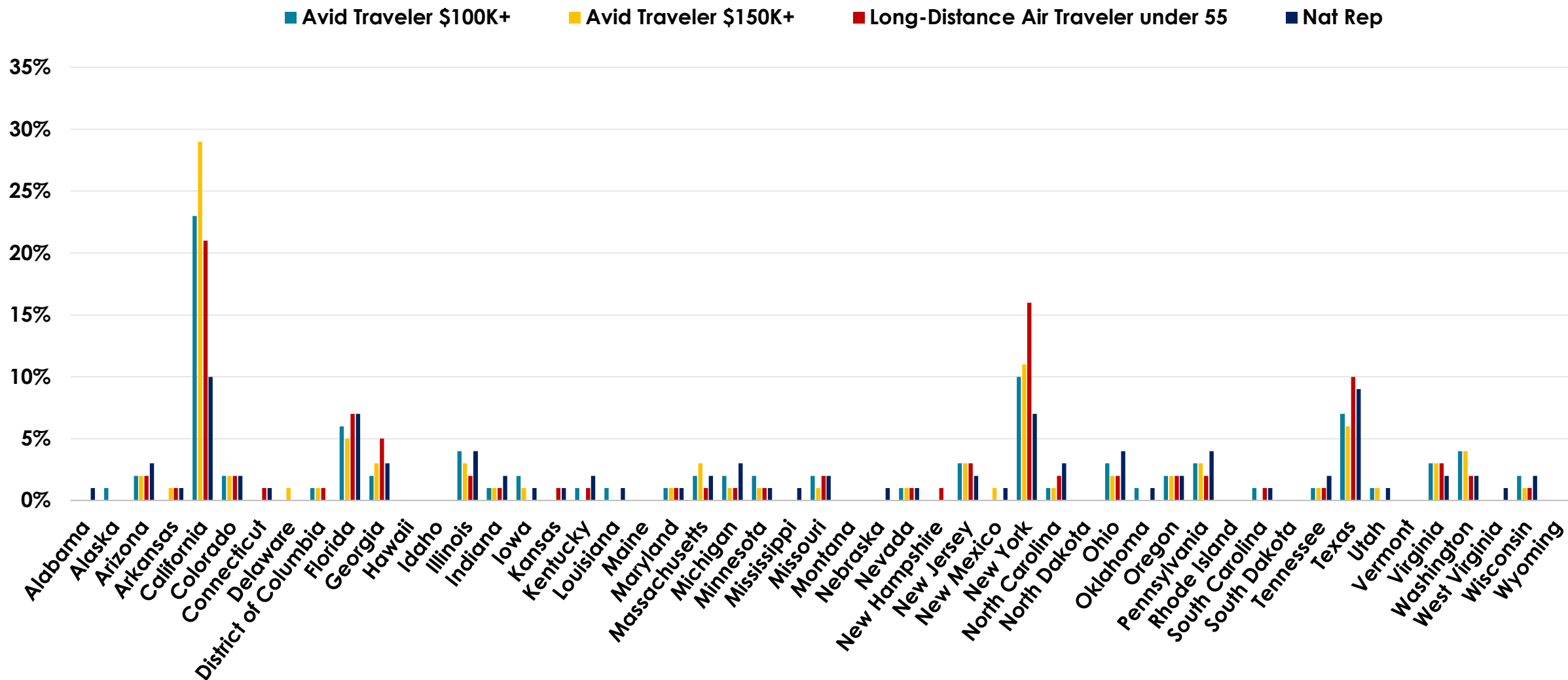
Avid Travelers vs. Long-Distance Air Travelers vs. Nat. Rep.

Type of Area Living In

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



State of Residence

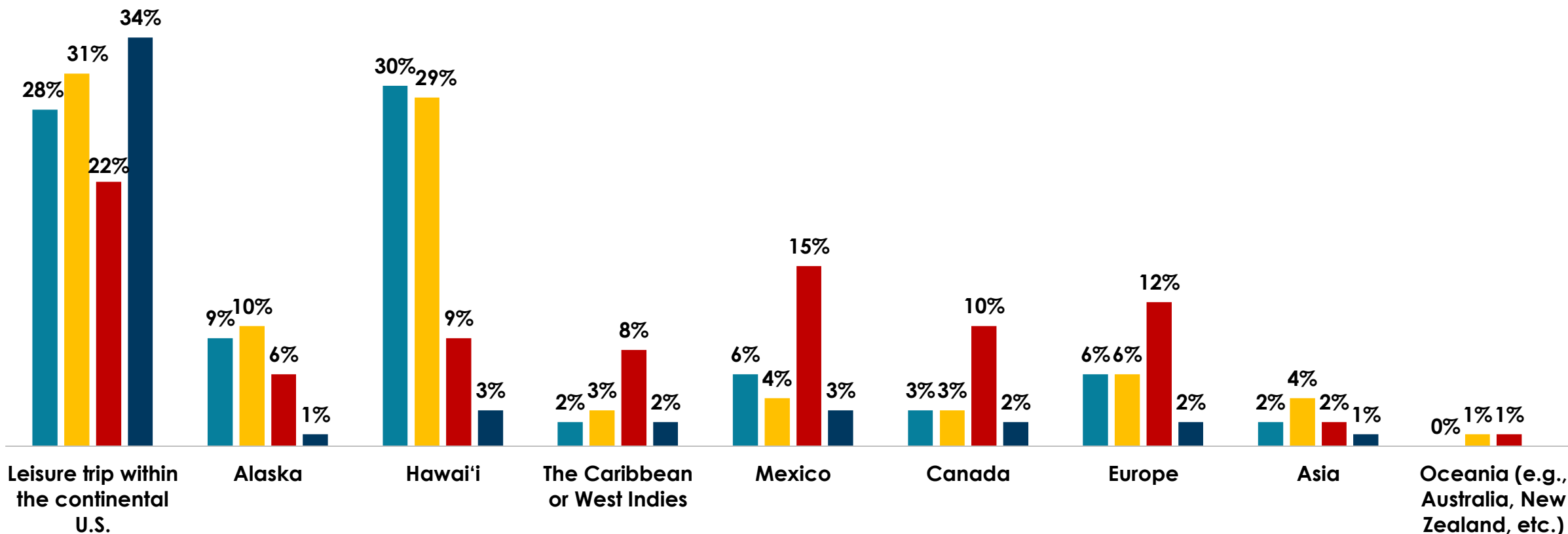


Top 10 States of Residence by Segment

| Avid Traveler \$100K, 25-54, individual | | Avid Traveler \$150K, 25-54, 2+ household | | Long-Distance Air Traveler under 55 | | Nat Rep | |
|--|-------|--|-------|--|-------|--------------|-------|
| California | 22.7% | California | 29.2% | California | 20.9% | California | 10.1% |
| New York | 9.8% | New York | 10.5% | New York | 16.0% | Texas | 8.9% |
| Texas | 7.4% | Texas | 6.4% | Texas | 10.5% | Florida | 7.3% |
| Florida | 6.4% | Florida | 5.2% | Florida | 6.6% | New York | 7.1% |
| Illinois | 3.9% | Washington | 4.3% | Georgia | 5.2% | Pennsylvania | 4.2% |
| Washington | 3.5% | Georgia | 3.4% | New Jersey | 3.2% | Ohio | 3.9% |
| New Jersey | 3.4% | Illinois | 3.2% | Virginia | 3.0% | Illinois | 3.6% |
| Virginia | 3.3% | Virginia | 3.2% | Oregon | 2.4% | Georgia | 3.0% |
| Ohio | 2.8% | New Jersey | 2.7% | Washington | 2.1% | Michigan | 2.8% |
| Pennsylvania | 2.5% | Massachusetts | 2.7% | Illinois | 2.1% | Arizona | 2.8% |

Leisure trip – most recent destination

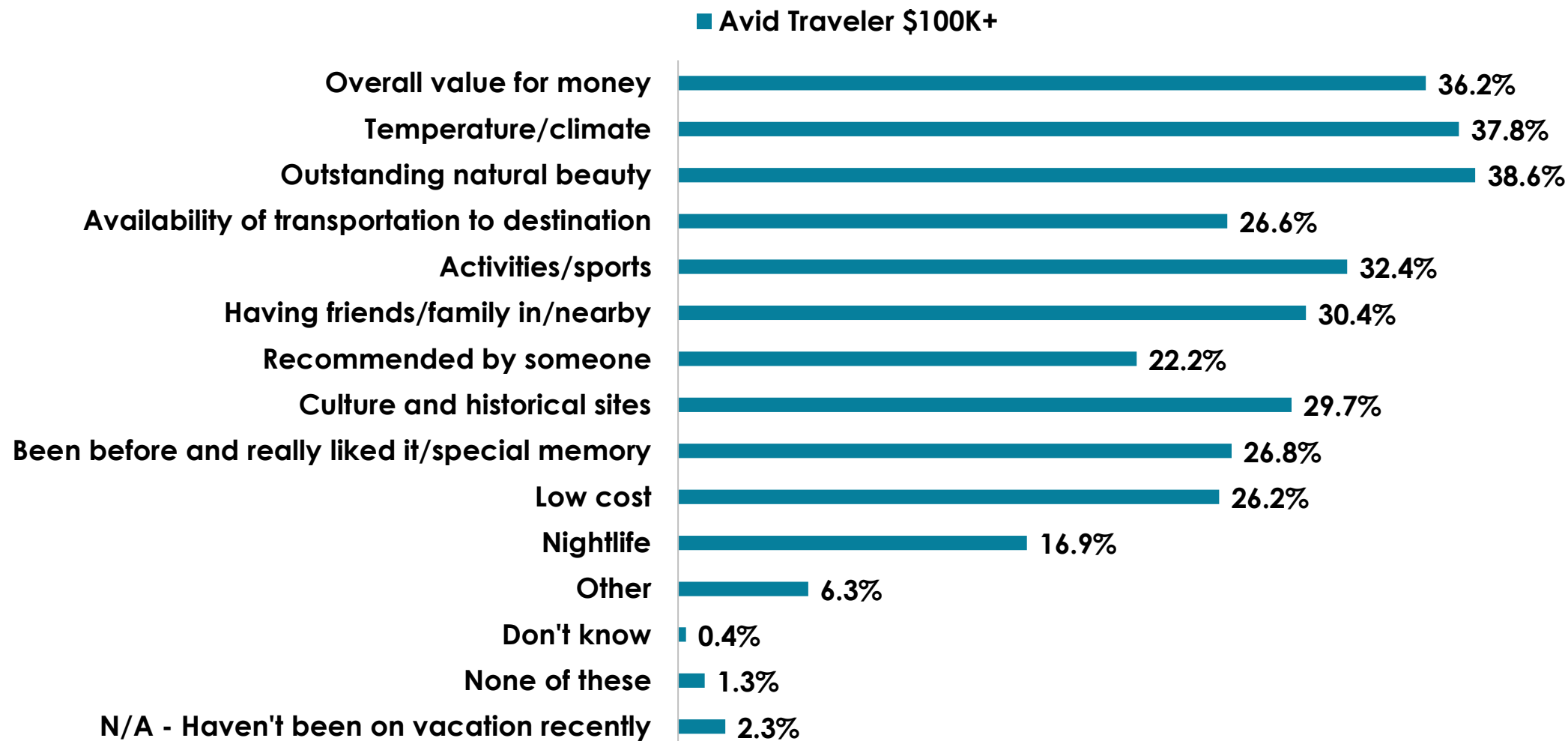
■ Avid Traveler \$100K+
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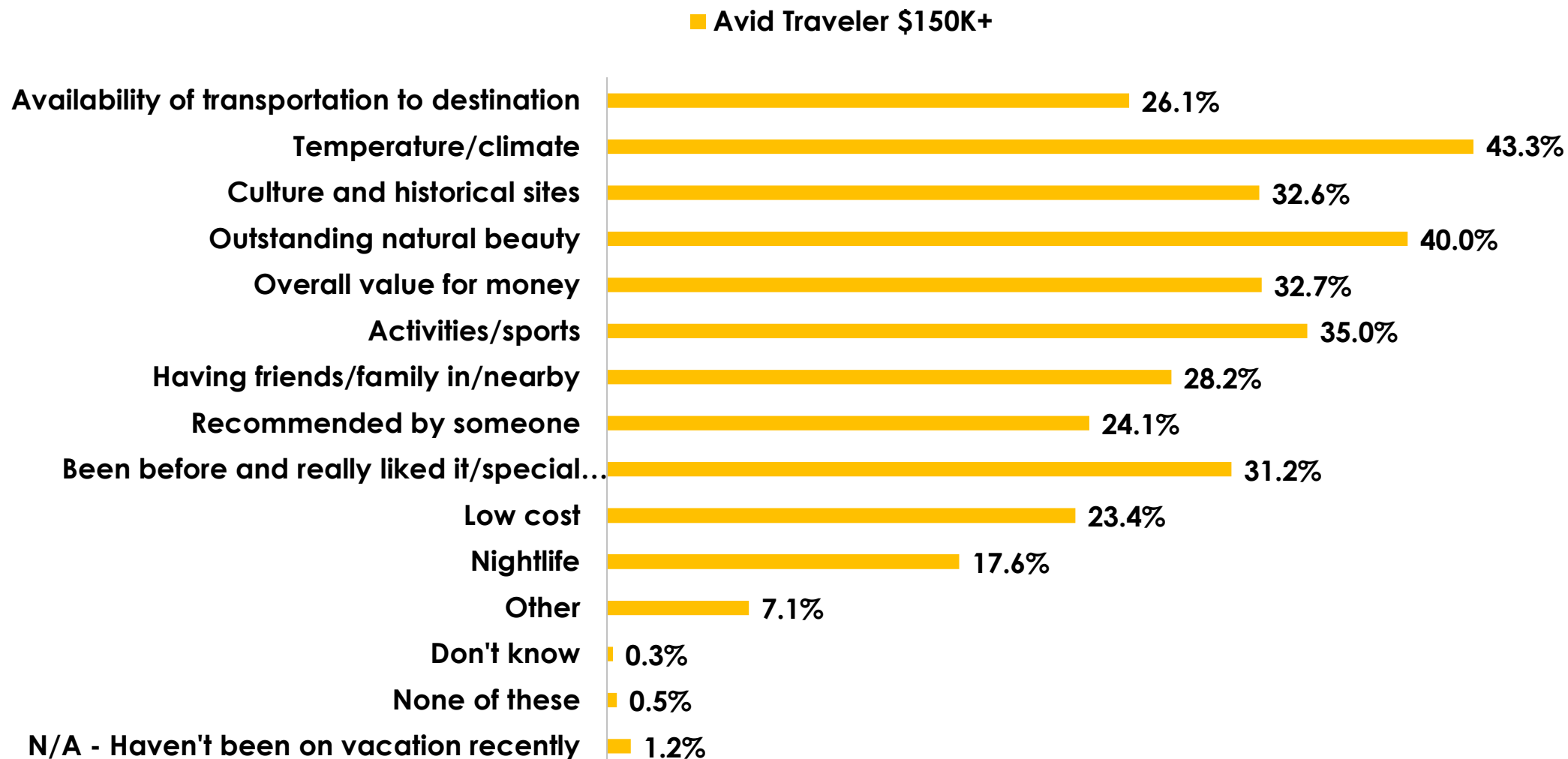
Reason for choosing most recent leisure destination

| 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 | 37.8% | 43.3% | 35.4% | 24.0% |
| Availability of transportation to destination | 26.6% | 26.1% | 30.8% | 14.8% |
| Culture and historical sites | 29.7% | 32.6% | 34.0% | 18.4% |
| Overall value for money | 36.2% | 32.7% | 33.0% | 30.9% |
| Activities/sports | 32.4% | 35.0% | 32.3% | 16.8% |
| Outstanding natural beauty | 38.6% | 40.0% | 34.0% | 24.1% |
| Nightlife | 16.9% | 17.6% | 29.1% | 8.8% |
| Having friends/family in/nearby | 30.4% | 28.2% | 35.8% | 24.6% |
| Low cost | 26.2% | 23.4% | 30.2% | 23.7% |
| Been before and really liked it/special memory | 26.8% | 31.2% | 21.3% | 19.3% |
| Recommended by someone | 22.2% | 24.1% | 36.8% | 14.4% |
| Other | 6.3% | 7.1% | 4.6% | 6.3% |
| Don't know | 0.4% | 0.3% | 1.4% | 2.0% |
| None of these | 1.3% | 0.5% | 0.6% | 2.3% |
| N/A - Haven't been on vacation recently | 2.3% | 1.2% | 3.4% | 23.6% |

Reason for choosing most recent leisure destination

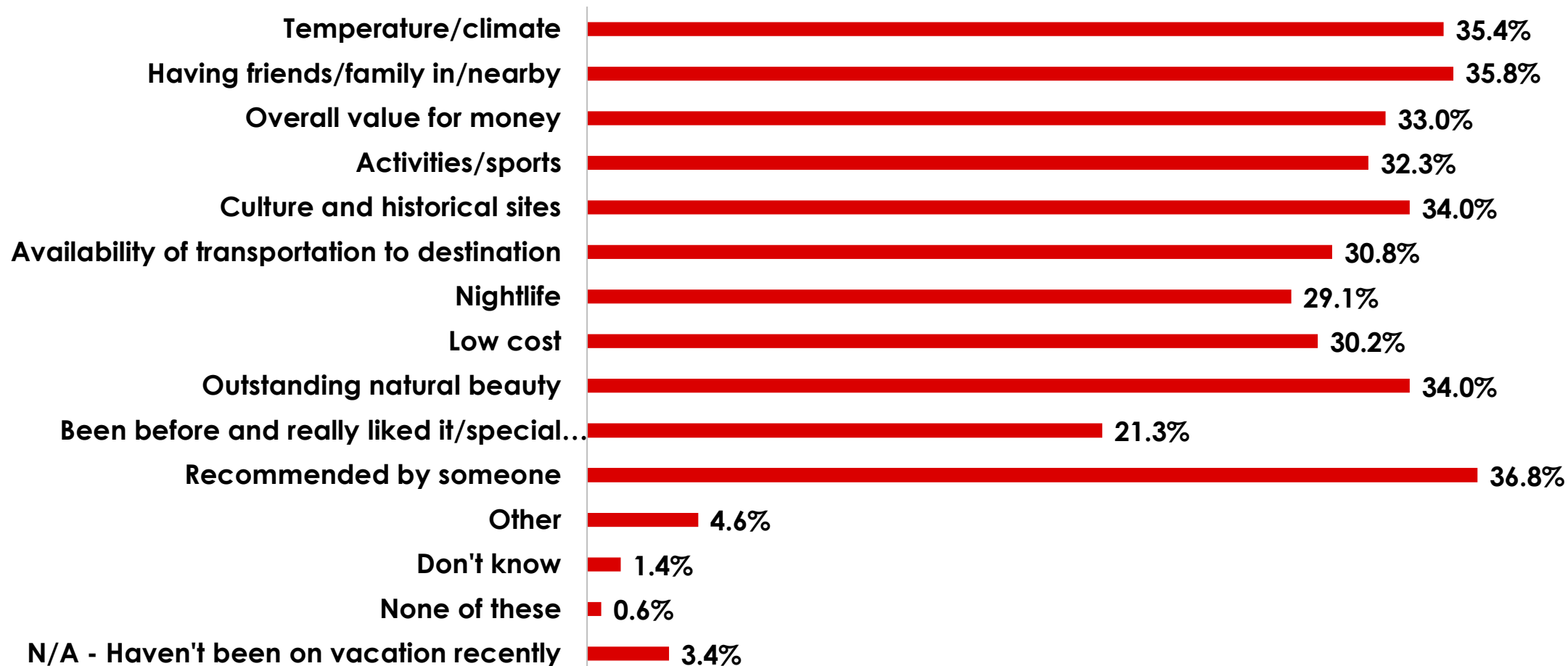


Reason for choosing most recent leisure destination

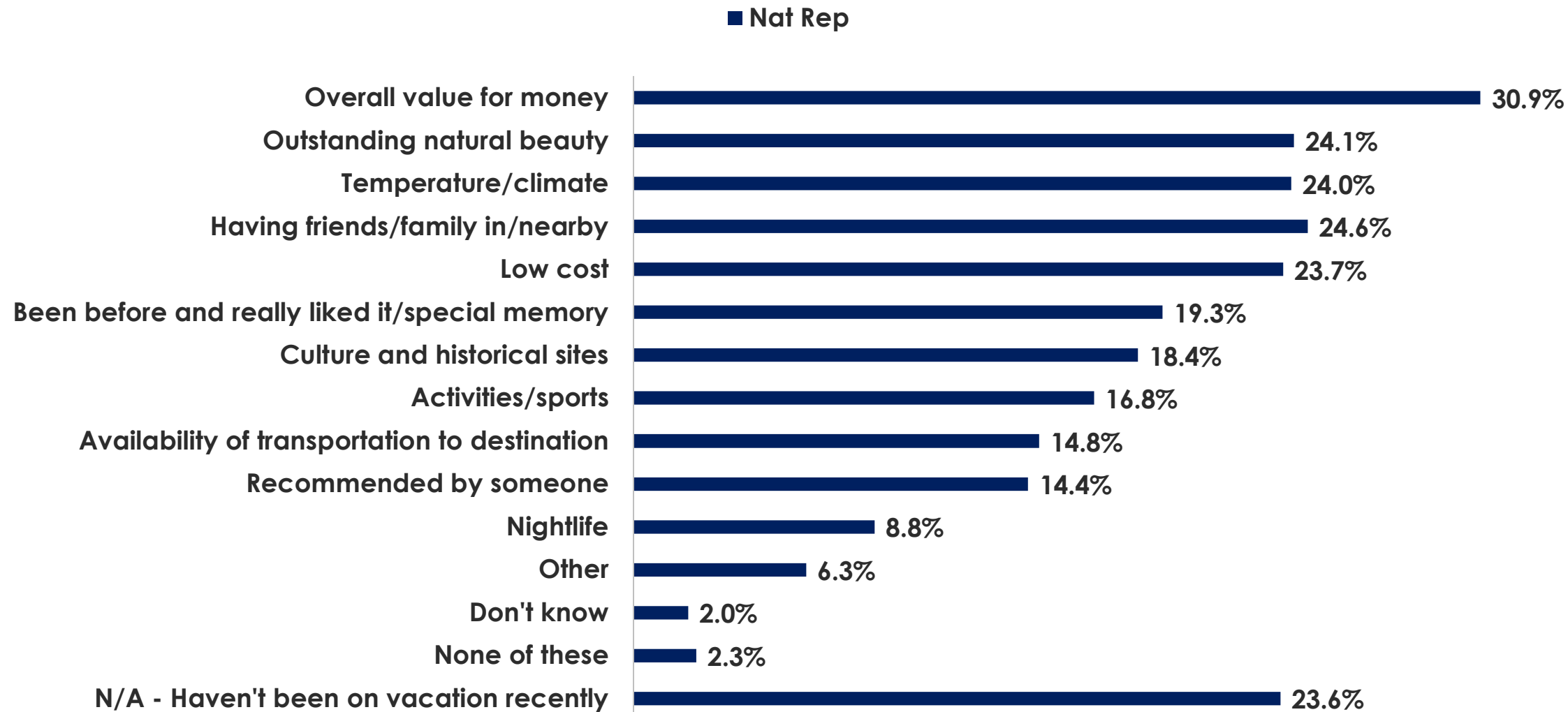


Reason for choosing most recent leisure destination

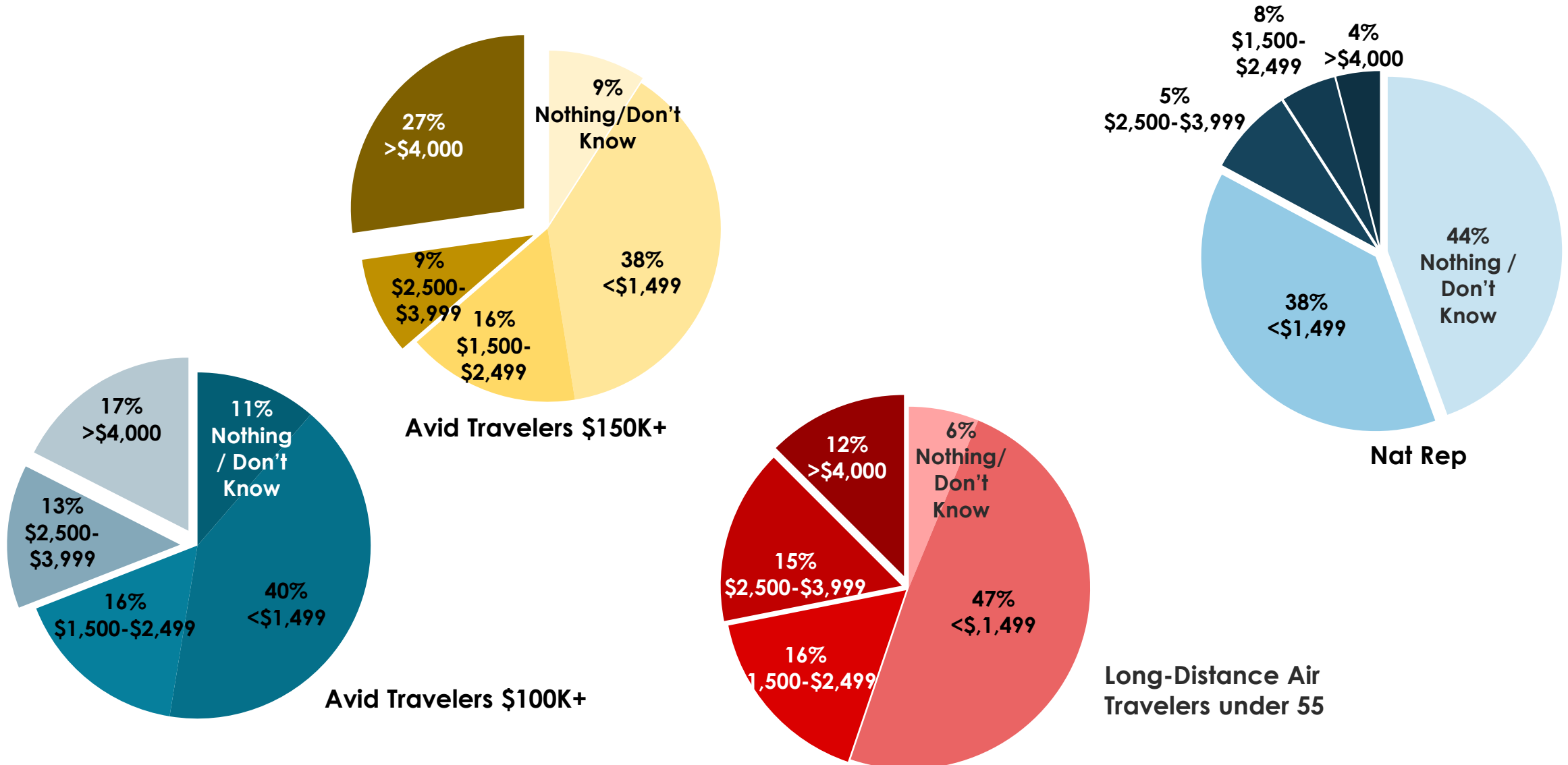
■ Long Distance Air Traveler under 55



Reason for choosing most recent leisure destination



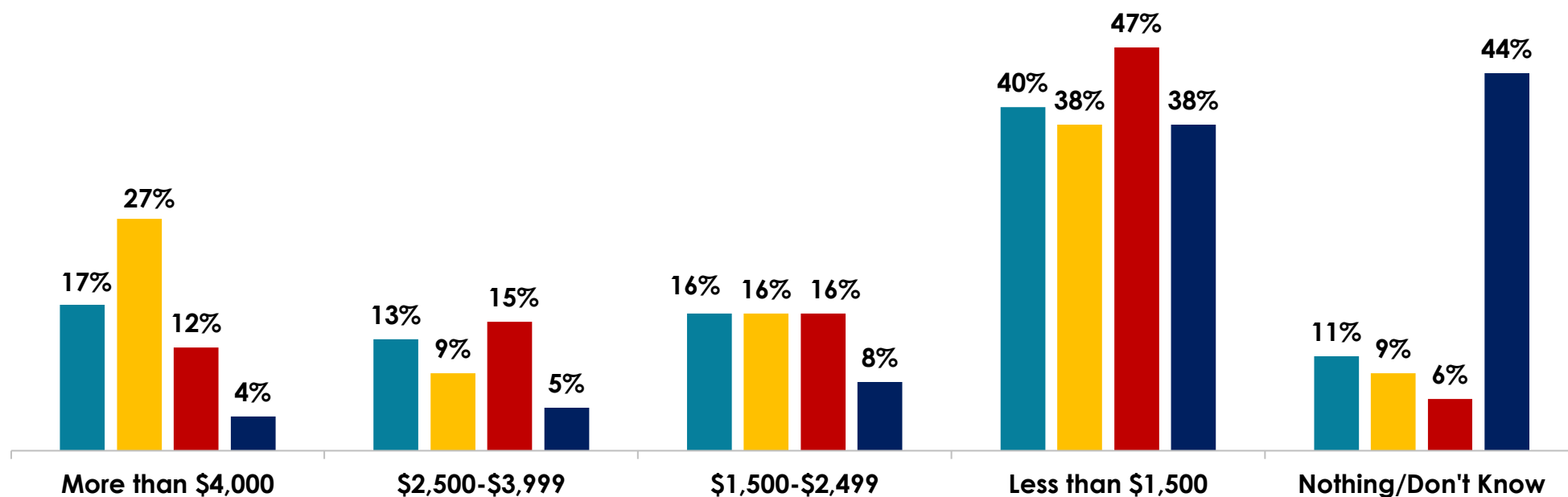
Most recent leisure trip - total spend



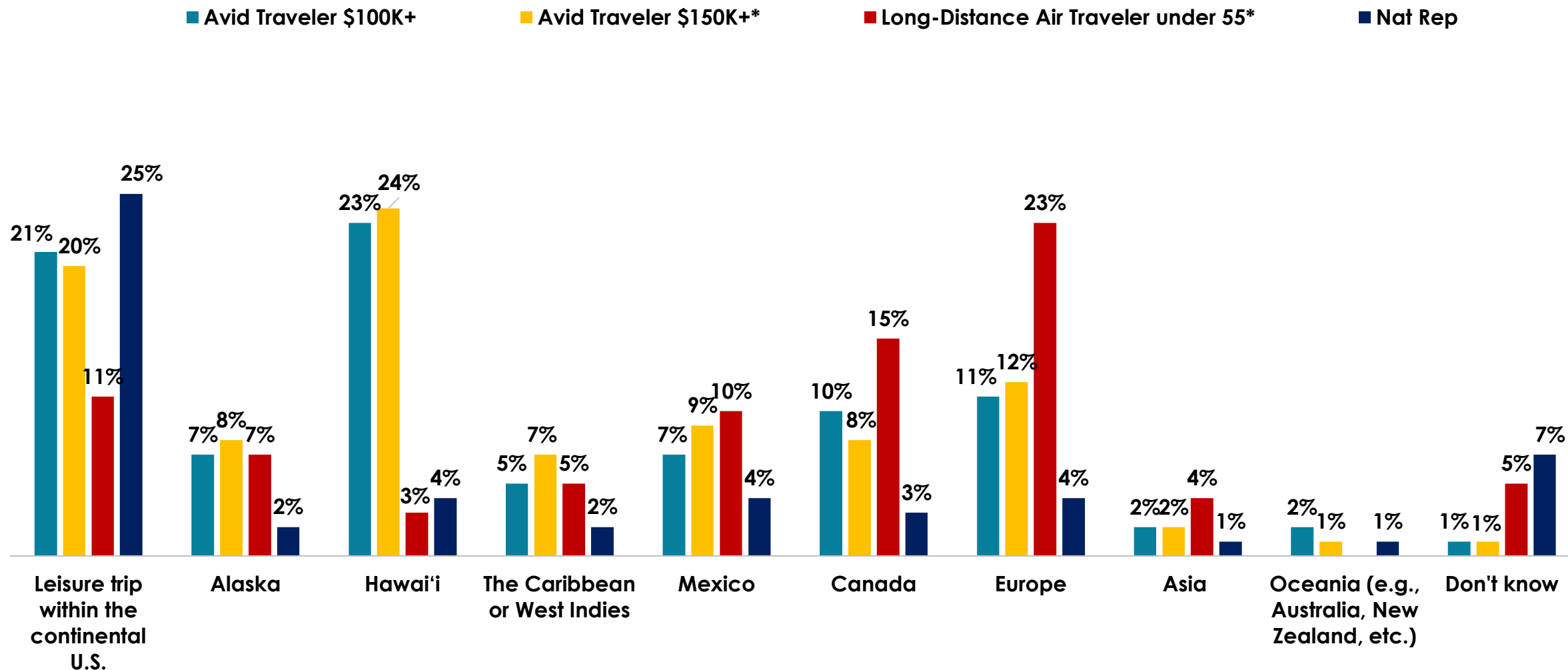
Based on Hawai'i Tourism Authority data, the average U.S. per person per trip spend for 2019 was \$1,693.32.

Most recent leisure trip - total spend

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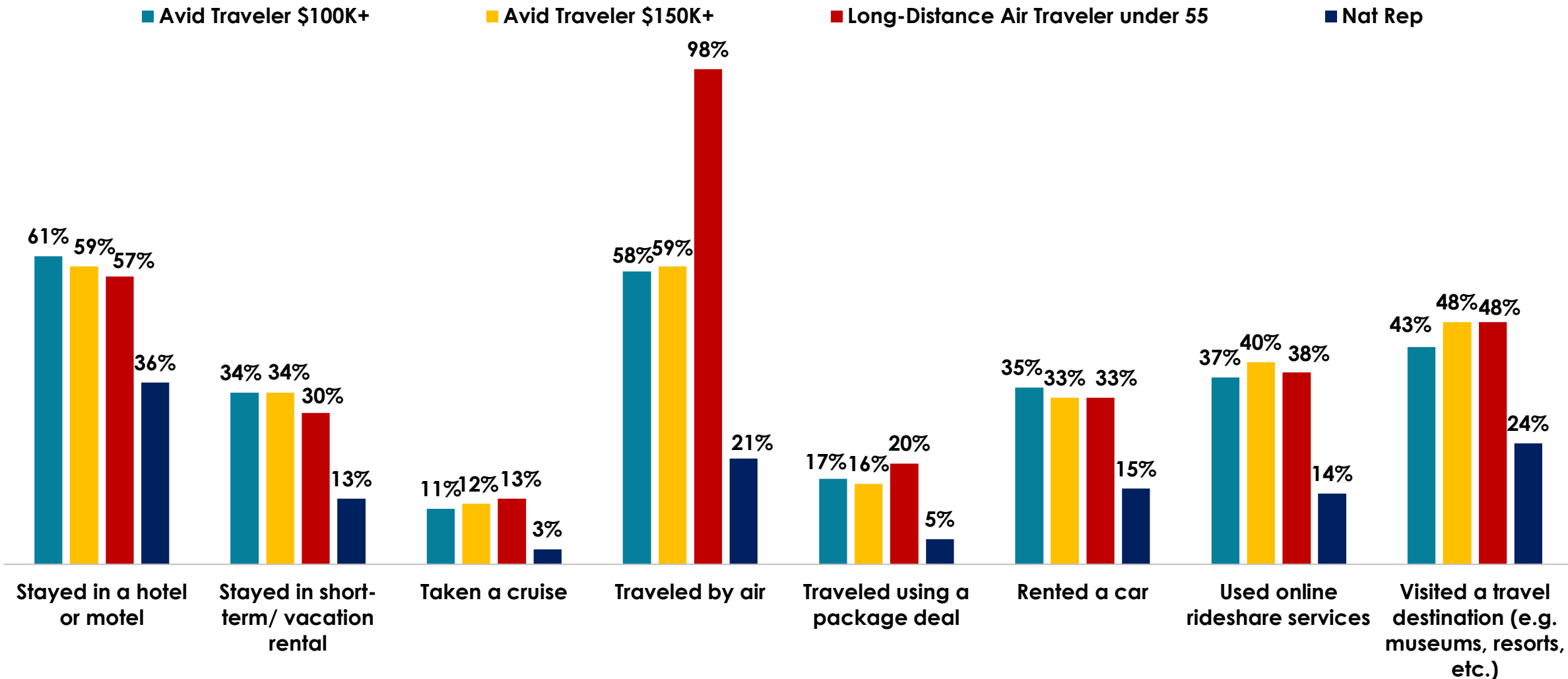
Leisure trip - next destination



*YouGov sample size <100

Source: HVCB analysis of YouGov data provided by HTA as of June 5, 2022

Leisure trip - activities in last 12 months



Travel Mindset

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 ■ Avid Traveler \$150K+
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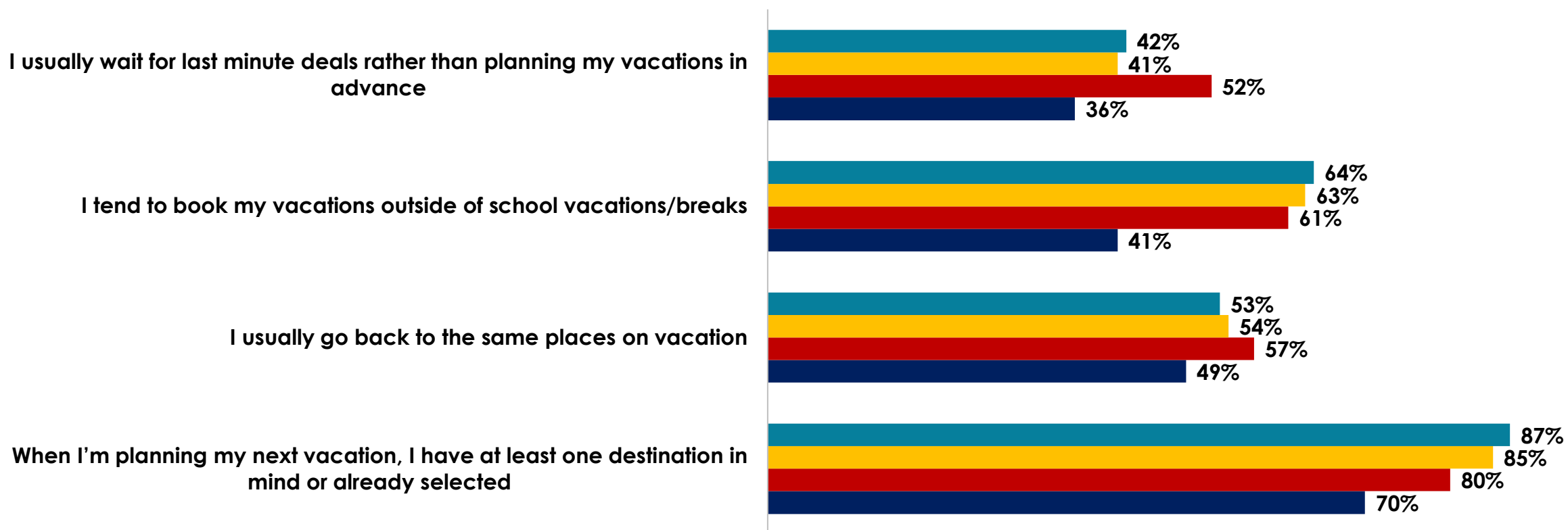
Travel Activities

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Booking & Spending Attitudes

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

