

# 1999 U.S. CONSUMER SURVEY

## Consumer Pleasers

### GETTING AWAY FROM IT ALL

By Jorge Sidron, Senior Editor

The opportunity to relax and get rid of stress is the strongest motivating factor for taking a vacation among consumers who took part in the 1999 American Traveler Survey.

Relaxing and stress-busting outscored the 11 other reasons listed in the survey, scoring 7.8 out of a possible 10. This meant most to people between the ages of 35 and 54, who gave those factors a score of 8.3 out of a possible 10.

Also, the heftier the paycheck, and the higher the stress level, the more likely people were to need to get away, according to the survey. People whose jobs paid between \$85,000 and \$100,000 a year said stress was the most important reason for getting away.

"I think a lot of this is the Northeast mentality, the type that has to be in the car at 4 a.m. to get to work," says William McIntosh, owner of McIntosh Travel Agency in Charleston, S.C.

Although even Southerners may have stressful lives, McIntosh says, "If you come from a more manageable area like South Carolina, you're more likely to have more energy to do something else besides sit on a beach."

McIntosh says the majority of his clients are "pre-baby boomers" — clients who were born before 1945. "They're graying and they want to do things," he says.

An agent in the Northeast, Pamela Tedesco, manager of Liberty Travel in Livingston, N.J., agrees. "Most of my clients come in because they're stressed out and want to relax, but we also get others who are looking for adventure and want to see other countries," says Tedesco.

"There's nothing contradictory about saying you want to go somewhere to relax, but still want to have things to do, like nightlife and shopping," Tedesco says.

Although relaxation was ranked by both sexes as the No. 1 reason for taking a vacation, women rated it more important than did men by a slight margin, 8 to 7.7.

Ranking a close second in motivating factors for taking a vacation, registering 7.6 out of 10, was not having a schedule and being able to do things when desired.

This factor has increased in importance the most compared to previous years, perhaps indicating an increasing frustration with busy schedules.

Two other desires, "taking time to see new things, gain new experiences" and "spending more time with spouse and family," are close behind as top motivating factors behind leisure travel. The former scored 7.3 out of a possible 10, while the latter scored 7.1.

What was at the bottom of the list? "Travel is an important part of my life," at 4.5, and "I seek solitude and isolation when vacationing," at 4.1.

#### WHY I LIKE TO TAKE VACATIONS

##### TRAVEL AGENT USERS VS. NON-USERS

	TOTAL	USERS	NON-USERS
Great chance to relax and get rid of stress	66%	71%	64%
No schedules, I can do what I want when I want	62	64	62
Spend more time with my spouse/family	57	59	56
See and do new things/have new experiences	56	66	52
I feel alive and energetic when I travel	37	43	34
Vacations enrich my perspective on life	33	40	30
Others serve me/wait on me	25	25	25
Knowledge/history of other cultures	24	28	22
Spend more time with friends	23	24	23
Vacations are a very romantic time	20	25	19
Travel is an important part of my life	20	32	15
Solitude and isolation	17	14	18

Base=Mentions any reason to take a vacation; top 3 reasons. Source: American Traveler Survey Special Analysis for CTG.

The most popular vacation motivators listed by consumers varies somewhat between those who use travel agents and those who don't. While the highest percentage of both groups list 'a great chance to relax and get rid of stress,' among the top three, the second highest percentage of travel agent users rank 'seeing and doing new things/having new experiences' among the most popular vacation motivators, while non-user responses place no schedules in the number two spot.

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Asked why they chose their last vacation spot, nearly half of all consumer respondents, or 48%, said they did so because the destination was "scenic" or "beautiful." That response was down from 56% in 1998.

A destination that was familiar — "been there before" — was a reason 44% of respondents chose their vacation spot, down from 50% in 1998.

Places with "lots of things to do" and "good weather and climate" also ranked near the top of the survey, although neither rated as highly this year as last year. Things to do was cited by 38% of respondents, compared to 48% in 1998, and the weather, by 35%, compared with 43% last year.

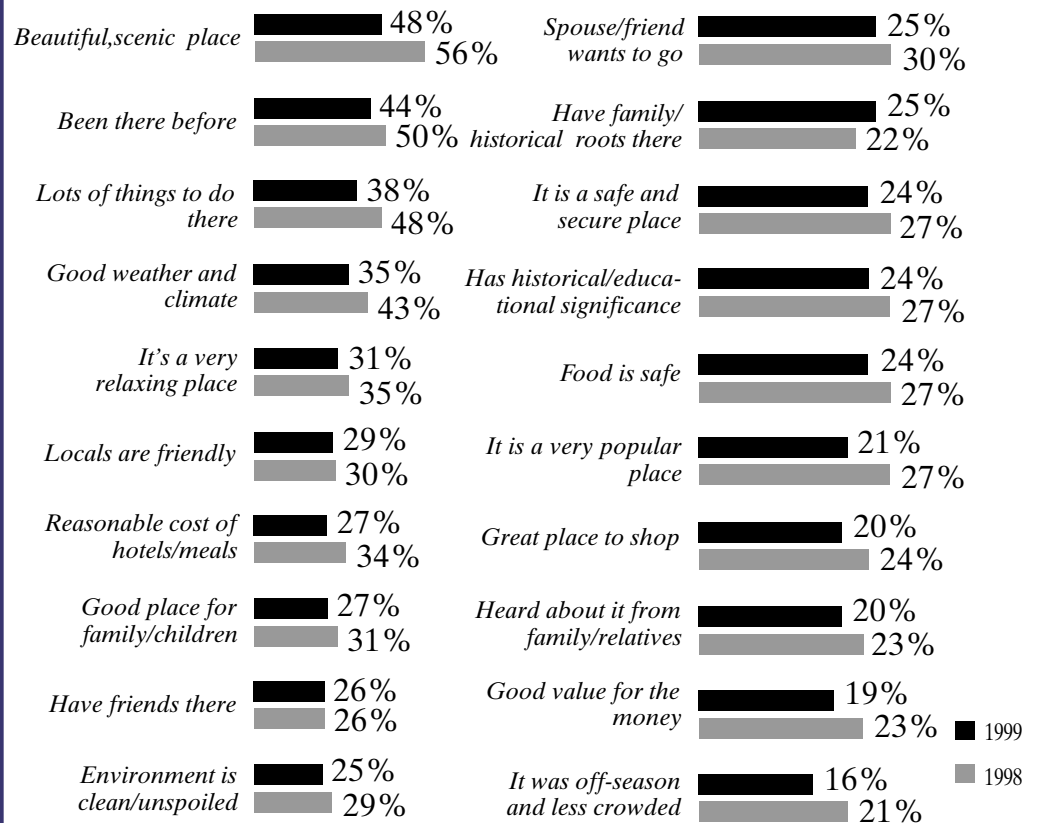
"People may choose to go somewhere because there's lots to do, but it doesn't mean they're going to do any of it," says McIntosh. "When we give out documents, we also give out maps, but lots of people aren't going to open them."

McIntosh says he would draw a line between people who say they want lots of things to do and those who truly seek active vacations.

"For the most part," he says, "people who want a soft adventure or an adventure vacation educate themselves beforehand and go directly to the operators and not to travel agents."

Factors that had the least influence on vacationers' choices were "good value for the money," picked by 19% of respondents, and a "less crowded, off-season" travel, cited by just 16% of consumers.

## FACTORS THAT CONTRIBUTED TO CHOICE OF LAST VACATION DESTINATION



Source: American Traveler Survey.

When choosing their vacation destination, travelers are most likely to consider areas that are beautiful and scenic (48%), regions that they are familiar with (44%), that have lots of activities (38%) and good weather and climate (35%). But it's interesting to note that these factors have slipped substantially in their impact on vacation choice, compared to a year ago, perhaps indicating more consumers are looking at more factors beyond the surface appeal of destinations.

## WHY I LIKE TO TAKE VACATIONS

	HOUSEHOLD INCOME					AGE					CHILDREN			GENDER		MARRIED		
	TOTAL	UNDER \$40K	\$40-60K	\$60-80K	\$85-100K	\$100K+	UNDER 35	35-44	45-54	55-64	65+	NONE	YOUNG	OLDER	MALE	FEMALE	YES	NO
Great chance to relax and get rid of stress	7.8	7.5	8.0	8.1	8.3	8.2	8.2	8.4	8.2	7.5	6.3	7.4	8.3	8.1	7.7	8.0	8.2	7.3
No schedules, I can do what I want when I want	7.6	7.4	7.7	7.7	7.8	7.6	7.8	8.0	7.5	7.4	6.8	7.3	7.9	7.5	7.4	7.7	7.8	7.2
Take time to see new things, gain new experiences	7.3	7.0	7.6	7.4	7.7	7.8	7.3	7.4	7.4	7.6	6.6	7.3	7.3	7.2	7.1	7.5	7.4	7.2
I can spend more time with my spouse/family	7.1	6.5	7.4	7.6	7.8	7.8	8.1	7.8	6.9	6.0	5.4	5.9	8.6	7.9	6.5	7.6	8.3	5.3
I feel alive and energetic when I travel	6.2	6.1	6.2	6.3	6.5	6.4	6.3	6.3	6.1	6.5	5.6	6.1	6.3	6.0	5.9	6.4	6.2	6.1
Vacations enrich my perspective on life	5.8	5.6	5.9	6.0	6.4	6.4	5.6	6.0	5.9	6.4	5.5	6.0	5.6	5.7	5.6	6.0	5.8	5.9
Others serve me/wait on me	5.1	5.0	5.2	5.2	5.5	5.6	4.5	5.1	5.3	6.0	5.3	5.4	4.7	4.9	5.1	5.2	5.0	5.3
To gain knowledge about history or other cultures	4.9	4.9	4.9	5.0	5.2	5.0	4.8	5.3	4.7	5.0	4.8	4.8	5.2	5.0	4.4	5.5	5.2	4.6
I can spend more time with friends	4.8	5.0	4.8	4.7	4.6	4.7	4.8	4.8	4.9	4.7	4.8	5.0	4.5	5.1	4.8	4.8	4.5	5.2
Vacations are a very romantic time	4.7	4.3	4.8	5.1	5.4	5.5	5.3	5.1	5.0	4.2	3.1	4.2	5.2	5.1	4.6	4.7	5.3	3.8
Travel is an important part of my life	4.5	4.2	4.5	5.0	5.3	5.7	4.1	4.5	4.8	5.3	4.1	4.9	4.0	4.2	4.5	4.5	4.4	4.7
I seek solitude and isolation when vacationing	4.1	4.2	4.1	3.9	4.0	4.0	4.0	4.4	4.5	4.3	3.1	4.1	4.0	4.6	4.2	4.0	4.1	4.1

Base = A 10 point scale where 10 = very important. Source: American Traveler Survey.

A great chance to relax and get rid of stress is the leading motivator for a high percentage of vacationing consumers, with two exceptions — those over the age of 65 and those with young children.

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Tedesco finds the value-for-money result puzzling. "That's interesting," he says, "because we get a lot of people who look through the paper and want the best price. I think most people want the best value they can get."

Consistent with previous years, a dirty and rundown hotel is the factor seen as most likely to spoil a vacation for leisure travelers (8.9 on a scale of 10).

Not surprisingly, the survey found that destinations that are generally dirty and those with unsafe food and water also distress vacationers.

According to the survey, another factor that can spoil a vacation is a lack of safety at the destination. Generally speaking, nobody wants to worry about being robbed while they're on vacation.

Getting "ripped off," as in being charged more for services or items because you're a tourist, also was cited as a factor that could spoil a vacation (8.3 on a scale of 10).

In fact, high prices ranked near the top of vacation spoilers in the survey, with a "very expensive" vacation experience rated a 7.9 out of a possible 10.

"I warn my clients about higher prices," says McIntosh. "If they go to St. Barts, I don't expect them to go into shock over the price of a drink. I tell them to plan for high prices in their travel budgets. But, if the cab driver charges \$5 more and they paid \$5,000 for their vacation, so what?"

Tedesco says she, too, makes clients aware of high prices and potential hidden costs. "If you're going to an expensive place like Bermuda, we'll recommend a meal plan or some other way to save money," she says.

According to the survey, relatively few travelers worry about circumstances at home or work while they're away. Respondents ranked "worry that home may be burglarized" 4.1 out of 10, while "worry about work when traveling" landed at the very bottom of the survey, or 2.4 out of 10.

"My clients are 50/50 on this point," says McIntosh. "Personally, when I go away, I tell my staff that if the office is burning, call the fire department, not me," he says.

Another survey question had to do with age and its influence on travel. According to the survey, summer vacations are most popular for age groups under 54, while those 65 and older find fall travel more appealing.

## ITEMS THAT CAN MAKE VACATIONS LESS ENJOYABLE: BY DEMOGRAPHICS

	HOUSEHOLD INCOME						AGE					CHILDREN			GENDER	
	TOTAL	UNDER\$40K	\$40-60K	\$60-80K	\$80-100K	\$100K+	UNDER 35	35-44	45-54	55-64	65+	NONE	YOUNG	OLDER	MALE	FEMALE
Hotel is dirty/run down	8.9	8.6	9.2	9.3	9.3	9.3	9.2	9.2	8.8	8.6	8.3	8.6	9.3	8.8	8.6	9.2
Dirty everywhere	8.6	8.3	8.9	9.0	8.9	9.0	8.9	8.9	8.4	8.5	8.0	8.3	9.1	8.6	8.3	8.9
Destination seems unsafe	8.6	8.3	8.8	8.9	8.9	8.8	8.8	8.9	8.5	8.2	8.0	8.3	9.0	8.7	8.3	8.8
Food/water unsafe to eat/drink	8.5	8.4	8.7	8.7	8.7	8.6	8.9	8.8	8.4	8.2	8.0	8.3	8.9	8.6	8.3	8.7
You can get robbed	8.5	8.3	8.7	8.7	8.6	8.6	8.7	8.8	8.4	8.1	8.0	8.3	8.8	8.5	8.3	8.7
Locals try to "rip you off"	8.3	8.2	8.4	8.5	8.5	8.4	8.7	8.5	8.1	8.2	7.7	8.1	8.7	8.2	8.1	8.5
Poor hotel service	8.2	7.9	8.3	8.4	8.5	8.5	8.4	8.4	8.1	8.0	7.7	8.0	8.5	8.1	8.0	8.4
Poor safety process of airline to there	8.2	7.9	8.4	8.4	8.4	8.5	8.4	8.4	8.2	8.0	7.5	8.0	8.5	8.2	7.8	8.5
Very expensive	7.9	7.9	8.2	7.8	7.5	7.0	8.1	8.2	7.9	7.5	7.3	7.5	8.4	8.0	7.7	8.1
Poverty is very evident	7.3	7.0	7.7	7.7	7.7	7.6	7.5	7.5	7.3	7.2	6.9	7.1	7.6	7.4	7.1	7.6
Too many "tourist traps"	7.3	7.1	7.4	7.4	7.4	7.4	7.2	7.3	7.1	7.4	7.3	7.3	7.2	7.4	7.2	7.3
Unfriendly locals	7.2	7.0	7.3	7.5	7.5	7.5	7.3	7.4	7.2	7.4	6.7	7.1	7.5	7.1	7.1	7.3
Rainy, cold, bad weather	7.1	6.8	7.2	7.5	7.5	7.4	7.2	7.3	7.2	6.9	6.8	6.9	7.4	7.2	6.8	7.4
Too much commercial development	6.6	6.5	6.6	6.8	6.8	6.6	6.3	7.1	6.7	6.6	6.3	6.5	6.8	6.6	6.6	6.6
Few speak English	6.6	6.6	6.8	6.6	6.4	5.9	6.9	6.8	6.3	6.2	6.3	6.3	7.0	6.7	6.3	6.8
Lack of facilities/services	6.1	6.0	6.2	6.2	6.4	6.3	6.1	6.3	6.0	5.9	6.0	6.0	6.2	6.4	6.0	6.2
Food not as good as I expected	5.5	5.1	5.6	5.9	6.0	6.1	5.4	5.9	5.6	5.1	5.1	5.3	5.7	5.4	5.2	5.8
Too many souvenir shops/fast food	5.2	5.0	5.2	5.5	5.6	5.8	4.5	5.4	5.4	5.6	5.4	5.4	4.9	5.2	5.2	5.2
Too much like other places visited	5.1	5.1	5.1	5.3	5.4	5.3	4.8	5.2	5.3	5.4	5.2	5.2	5.0	4.9	5.1	5.2
Worry that home may be burglarized	4.1	4.7	3.9	3.5	3.5	3.2	4.2	4.4	3.8	3.9	4.0	4.0	4.3	4.1	4.1	4.2
Concern that I might get sick	4.1	4.3	4.0	3.8	3.7	3.6	4.2	4.1	3.9	3.7	4.2	4.0	4.2	3.8	3.9	4.2
Poor or no sports facilities	3.7	3.6	3.9	3.9	4.0	4.2	3.7	3.9	3.7	3.7	3.7	3.8	3.7	4.1	3.9	3.6
Worry about work when traveling	2.4	2.5	2.3	2.2	2.3	2.5	2.5	2.6	2.5	2.2	2.1	2.4	2.5	1.9	2.5	2.3

Base = A 10 point scale where 10 = could spoil a vacation.  
Source: American Traveler Survey.

Some things that can spoil a vacation vary significantly with household income. As household income increases, travelers express greater concern about dirty hotels, things dirty everywhere, poor hotel service and lack of facilities/services. As household income declines, travelers worry more about expenses, language and sickness.

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"The older you get, the less time you want to spend in the sun," says McIntosh, who didn't reveal his age, but admits his dermatologist often "screams at me."

### Why Some Clients Hop Around

Following are the results of Travel Weekly's consumer survey titled Dimensions of Travel Agency Loyalty and Usership Among Leisure Travelers — Travel Agency Hoppers, conducted by Plog Research.

Travel agency hoppers, defined as consumers who used two or more agencies during a one-year period, believe they will get a better price or better overall value by using more than one retailer, according to the Travel Weekly Survey.

Although virtually all retail agents use one of the four major CRSs, some hoppers found that some agents are better at finding low prices than others, or that some have relationships with consolidators that, in turn, enable them to pass savings along.

Thirty-three percent of respondents chose better price as a reason to use more than one agency. However, a significant portion, 26%, indicated a different agent was used because someone else was making their travel arrangements.

The Travel Weekly survey found that 11% of respondents hop among agencies to benefit from special expertise. This could mean seeking out cruise-only firms or those specializing in travel to a particular part of the world.

Dissatisfaction with an agency was given as a reason by 6%, 5% sought a more knowledgeable agent and 4% indicated that availability played a role.

Hoppers book an average of 4.5 leisure trips a year, and 82% of their trips are to domestic locations and 18% to international locations.

Hoppers use agents for about half (52%) of their leisure trips that involve at least one overnight stay. Trips that do not involve an agency include simple itineraries, such as airline shuttles where advance bookings are not necessary, and car trips. For international trips, hoppers use agencies for 92% of their bookings.

The survey asked respondents about their reasons for seeing a travel agent on their previous two visits. Forty-one percent said at least one of the contacts involved the purchase of an air ticket; 37% said at least one involved a domestic package trip; 34% said it involved a cruise; 29% cited an international package trip, and 6% cited a hotel reservation. One in three hoppers purchased a cruise as one of his last two leisure trips.

Most hoppers do not hop a great deal. Eighty percent used two agencies; 20%, three or more agencies during a one-year period.

Hoppers from the West average the fewest number of agencies, 2.1; from the Northeast, 2.2; from the north-central region, 2.3, and from the South 2.4. Only 9% of travelers who have used a travel agent qualify as hoppers.

When asked what it would take to get hoppers to keep using the same agent, 53% said they wanted to get good deals.

Breaking down that figure, 42% said that "always getting good deals" would keep them with the same agency, while 11% said that being kept "informed about special deals and promotions" would turn them into loyal customers.

Nine percent cited "personal communication on an ongoing basis" as a reason for remaining loyal.

Looking at future usage intent, 64% of respondents said they will again use the agency they last used to book their travel.

Those who will not use the same agency most often cited price (18%) as their main reason. Another reason for not intending to use the same agent is that the traveler will be going to a different destination (13%).

For this survey, a total of 202 respondents were interviewed by phone and met the following criteria: They traveled for leisure on two or more occasions in a 12-month period, which included an overnight stay, and they used the services of one travel agent for one or more of these trips. Some 56% of respondents were female, 44% male; the average household income was \$98,00. The average age was 55.