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# Caribbean Tourism Organization Presentation

## The U.S. Travel Market



## Introduction

- Two Sources of Research
  - Travel Industry Association / Ypartnership travelhorizons Study
  - 2008 Ypartnership/ Yankelovich Inc National Leisure Travel Monitor
- The purpose of the research is to measure the current status and changes in leisure traveler past behavior, future leisure travel intentions and consumer values and lifestyles and in particular as related to interest in visiting the Caribbean.
- The samples of both studies are nationally representative and the insights projectable to the population.
- The sample sizes were approximately 2200 each, fielded in the Winter/Spring 2008



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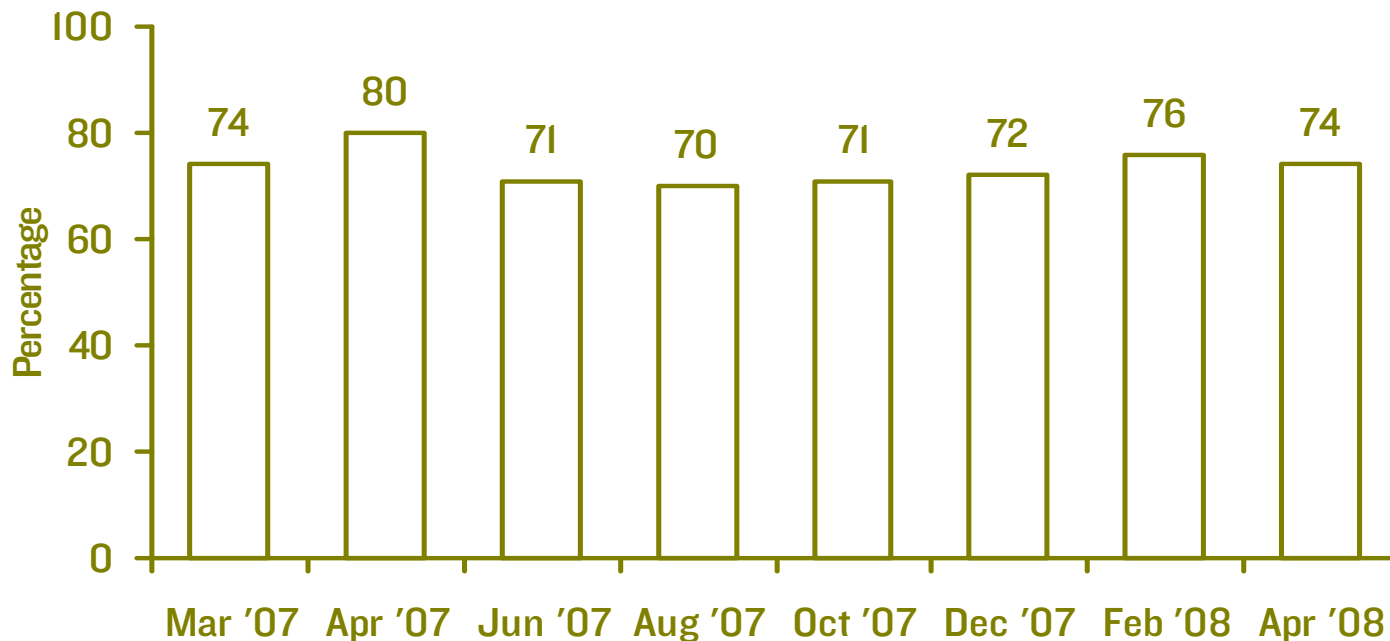
# TRAVELHORIZONS

PERSPECTIVES ON THE TRAVEL INTENTIONS OF AMERICANS



## INTENT TO TRAVEL FOR LEISURE PURPOSES SOFTENS

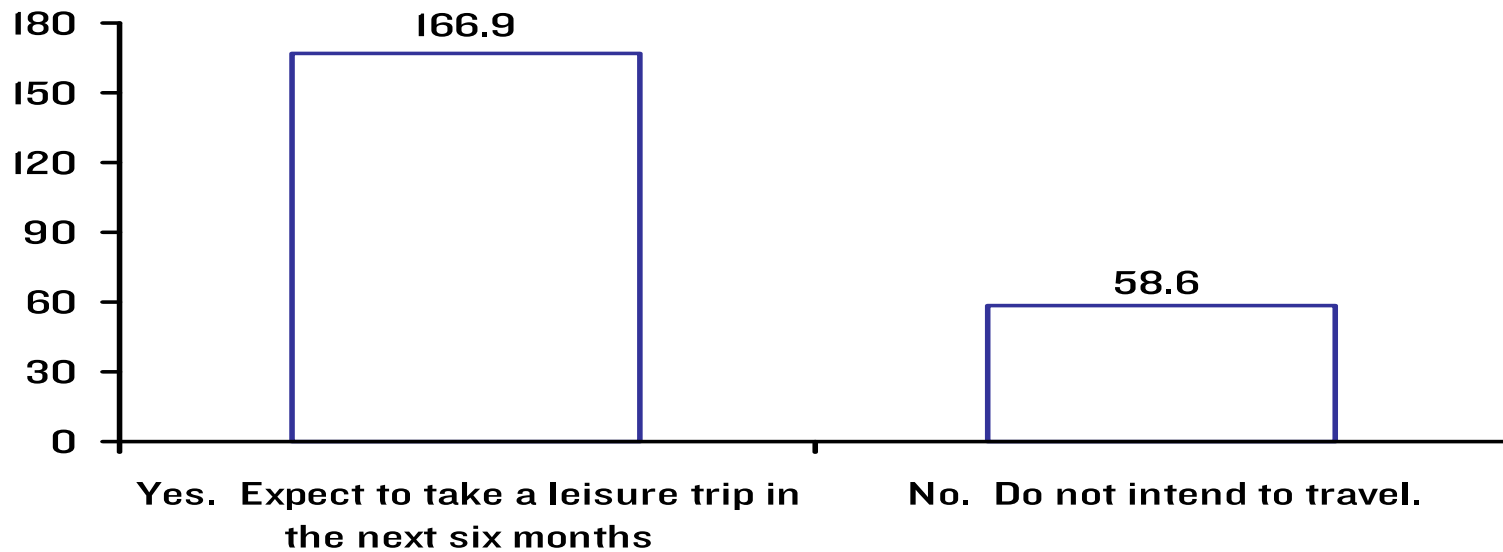
- The percentage of U.S. adults planning on taking at least one leisure trip during the next six months fell from 80% in April 2007 to 74% as of April 2008.
- Although down from April 2007, intent to travel for leisure purposes is still high with nearly three-fourths of adults expecting to take leisure trips between April and October.





# 167 MILLION ADULTS INTEND TO TRAVEL FOR LEISURE PURPOSES

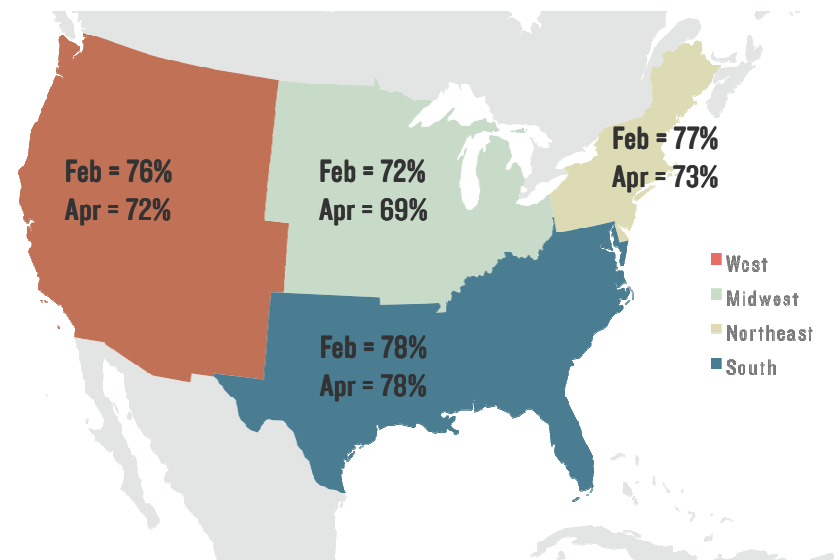
- \* Based on a total of 225.6 million Americans age 18 years or older,
- \* 166.9 million expect to take a day trip or overnight leisure trip within the next six months.
- \* About 59 million have no immediate leisure travel plans.
- \* Compared to February 2008, approximately 5.2 million fewer adults plan to take leisure trips in the next six months.





## INTENT TO TRAVEL BY CENSUS REGION

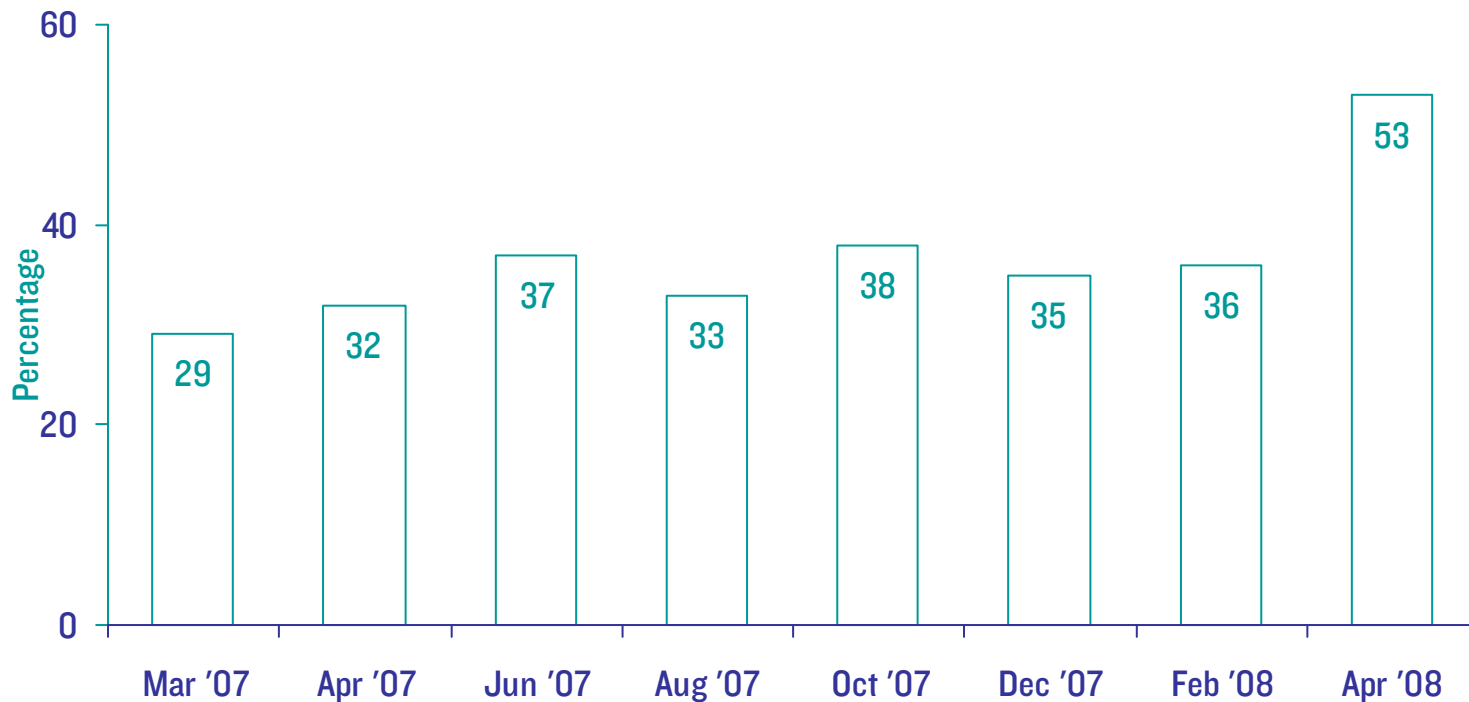
- Intent to take a leisure trip in the next six months decreased between February and April 2008 among three of the four census regions of origin. Only the percentage of adults living in the South region remained unchanged (78%). The percentage of residents expecting to travel for leisure purposes in the next six months declined by four percentage points for the West and Northeast regions, while the Midwest fell by three percentage points.





## CONCERN ABOUT GAS PRICES JUMPS FROM 38% TO 53%

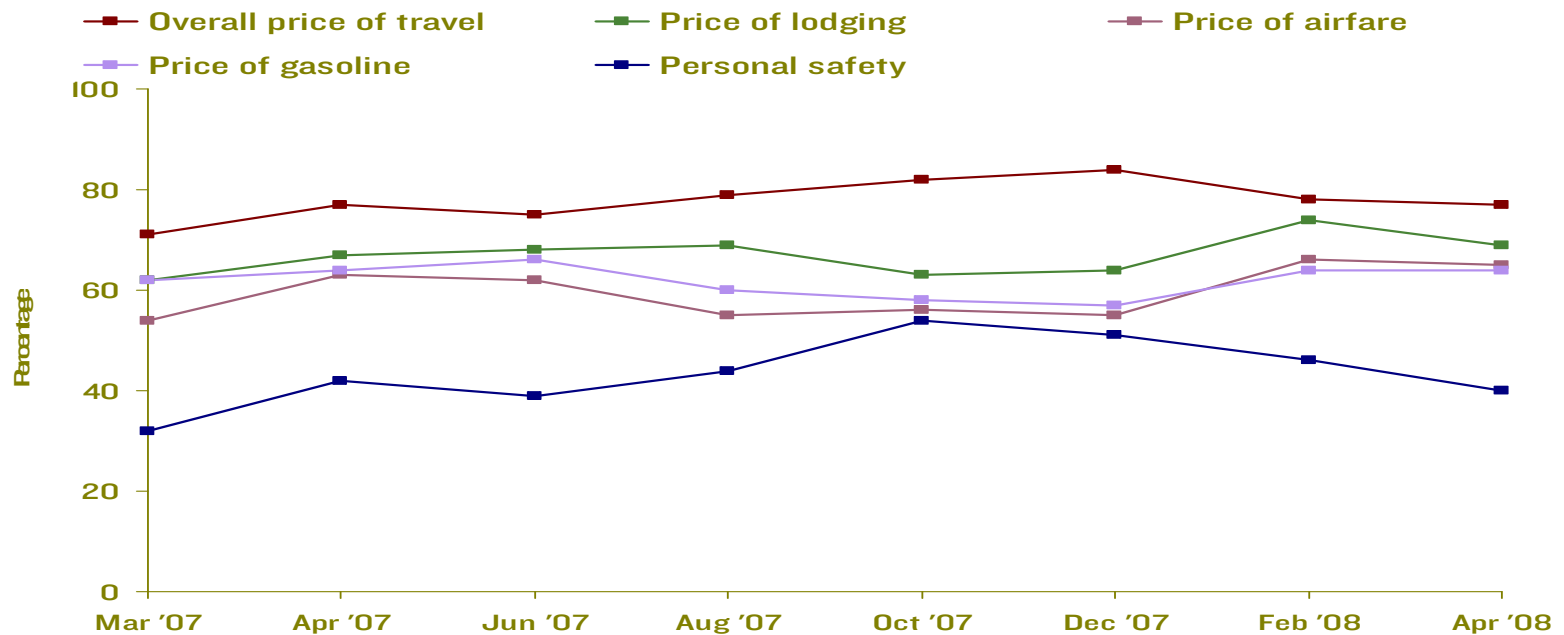
- Between February and April 2008, the percentage of Americans citing the cost of gas as the reason for not taking a leisure trip in the next six months jumped from 38% to 53%.
- Gas prices have jumped from \$2.98 to more than \$4 per gallon nationwide.





## TOP FACTORS AFFECTING LEISURE TRAVEL IN GENERAL STABLE

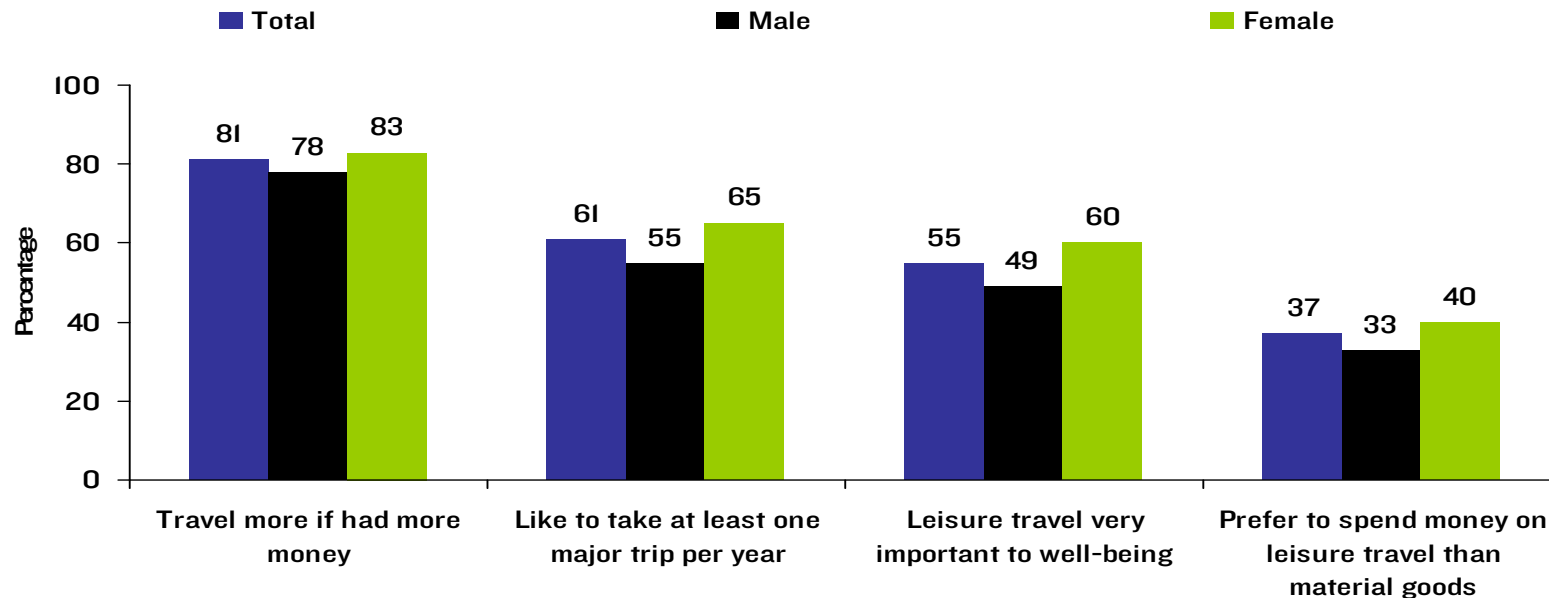
- Viewed in the context of leisure travelers in general, the factors affecting decisions to take leisure trips depict a more stable leisure travel environment.
- The high cost of gas and its potential impact on leisure travel has received much of the media attention in recent months. However, among all leisure travelers, the price of lodging (69%) is more of a factor than the cost of gas (65%) in deciding whether or not to take a leisure trip.
- The percentage of leisure travelers citing the “overall price of travel” for not taking leisure trips is unchanged comparing April 2007 with April 2008 (77%).





## ADAPTING TO HIGHER TRAVEL COSTS

- Americans appear to be adjusting to the combination of higher cost of travel and reduced discretionary spending by generally cutting back on travel costs.
- Asked what they are more likely to do on vacation this summer compared to years past?
  - 50% said they would “spend less overall.”
  - 57% said they would stay at less expensive hotels and resort
  - 54% are considering booking a packaged vacation rather than buying seperately
  - 53% say they will take shorter auto trips from home.
- Given these factors and the strongly likelihood of fewer leisure travelers this summer and perhaps into the fall, destinations and attractions may expect not only fewer visitors, but also less spending!





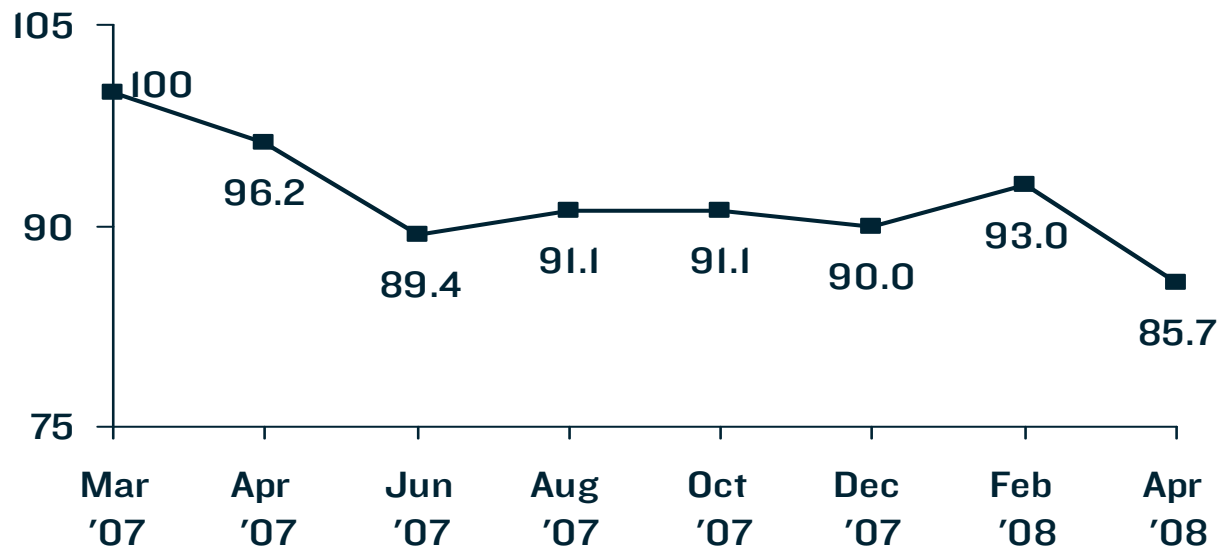
## TRAVELER SENTIMENT INDEX™ AND SCORES

- Traveler Sentiment Scores are calculated by subtracting the percentage of adults responding negatively to one of the indicators from those providing positive scores and adding 100 to the calculation. Each survey period is treated separately from the other.
- A value above 100 means that a higher percentage of respondents are more positive about a particular attitude toward travel than those who feel negatively about travel. A score below 100 reflects higher negative attitude than positive.
- Rather than looking at the change in values by each survey period, the Traveler Sentiment Index™ is tied to a base year. In the case of the TSI, the base year is March 2007. The TSI is calculated by taking the differential score for a survey period divided by the March 2007 value and multiplying this by 100.
- The Traveler Sentiment Index™ and Score are based on six indicators, including:
  - Overall interest in travel
  - Demands on time available to travel
  - Personal finances available for travel
  - Affordability of travel
  - Quality of service received
  - Safety of travel in the United States



## "AFFORDABILITY OF TRAVEL" DRIVES DOWN OVERALL TRAVELER SENTIMENT INDEX

- Between February and April 2008, the "Affordability of Travel" Index fell from 79.9 to 57.1 – a drop of 22.8 points (Page 51).
- The decline is coincidental with the loss in consumer confidence and reflects ongoing concerns about the economy – from increasing gas prices to the cost of food and travel.
- The Overall TSI declined from 93.0 to 85.7 between February and April -- the lowest Index since the TSI was established in March 2007. With the April decline, the Overall TSI is down 14 points from the March 2007 base.
- All indicators, with the exception of "Safety," contributed to the decline.





## CONSUMER ADJUSTING TO GAS PRICES? “TIPPING POINT” OVER \$4

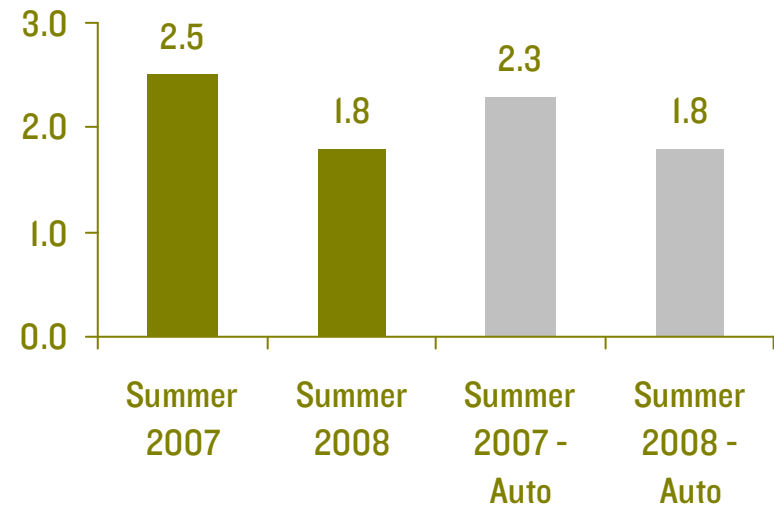
- Although the high cost of gas is having an impact of summer travel, it appears that consumers may be adjusting to the ever-increasing prices.
- Interestingly, the way in which U.S. adults would alter travel plans have changed from February.
- Now that the summer travel season is here, it appears that leisure travelers are less inclined to change their travel plans if gas prices rise beyond a certain point.
- For example, in February, 45% said they would “cancel their trip.” The percent saying they would cancel travel plans declined to 36% according to the April 2008 survey.
- Most (38%) say they will travel, but drive shorter distances. However, “trip cancellations” (36%) and “take fewer trips” still rank high.

Impact	Feb '08	Apr '08
Cancel my trip	45%	36%
Take fewer trips in coming months	41	36
Drive shorter distances	35	38
Postpone trip until gas prices drop	35	26
Spend less on shopping	31	30
Spend less on entertainment	30	27
Spend less on meals/restaurant	29	27
Shorten length of trips	25	21
Stay with friends/relatives instead of paid lodging	24	17
Spend less on hotels	22	23



## FEWER TRIPS THIS SUMMER

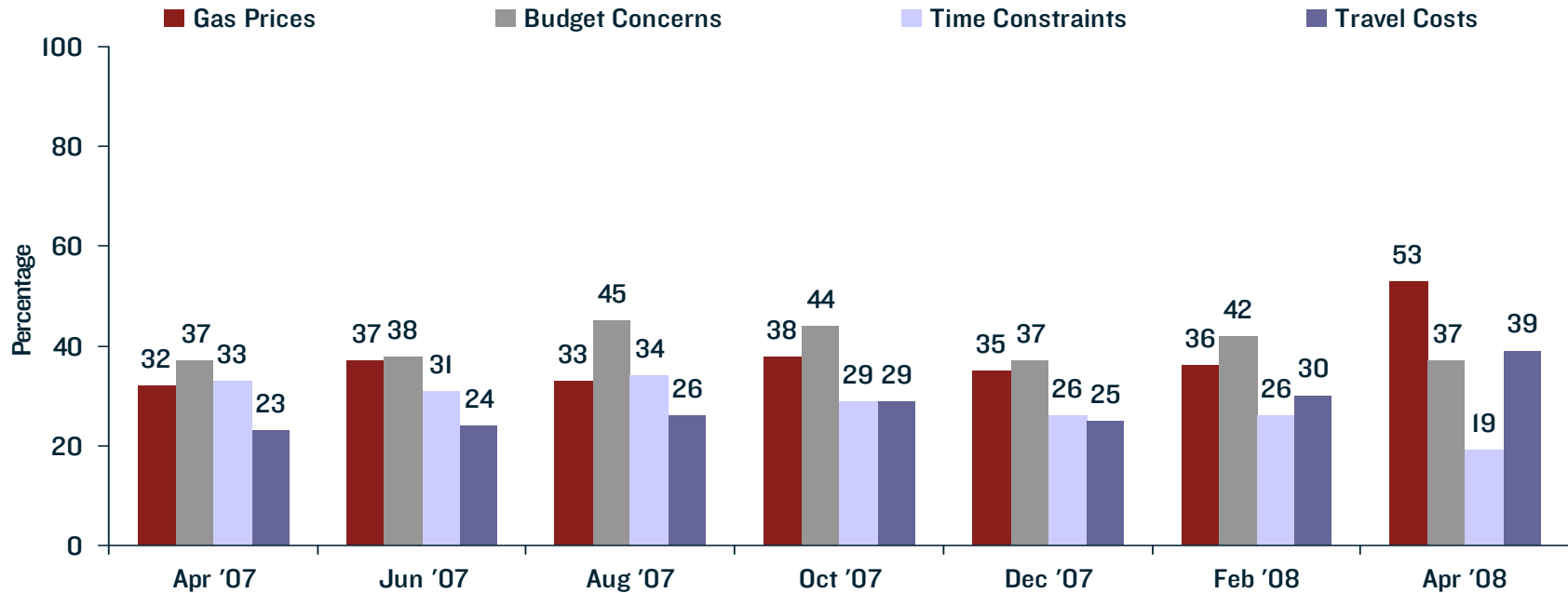
- It appears that leisure travelers are expecting to, indeed, take fewer trips this summer compared to summer 2007.
- Last summer, travelers took an estimated 2.5 leisure trips.
- If intentions hold true, leisure travelers will take an average of 1.8 trips this summer – a decline of 28%.
- Leisure trips taken by auto show a similar pattern, declining from an average of 2.3 in summer 2007 to 1.8 in summer 2008.





## REASONS FOR NOT TAKING A LEISURE TRIP

- Among the 59 million U.S. adults with no intention to take a leisure trip in the next six months, the price of gasoline (53%) surged ahead of “budget concerns” (37%) in April 2008 as the primary reason for not traveling.
- Over this period, “no time” as the reason for not traveling has declined from about a third of adults not intending to travel to 19% in April. Clearly, U.S. adults are feeling the economic pinch to a greater extent than time and other factors.





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## TRAVEL OVERVIEW FOR SPRING AND SUMMER 2008

- The combination of high gas prices and other financial concerns have the capacity to significantly impact leisure travel and travel spending over the spring and summer 2008 travel season.
- Half (50%) of Americans planning on traveling for leisure purposes this summer say they will spend less overall compared to last summer, including...
  - Staying at less expensive hotels (57%),
  - Spending less on food and entertainment (50%) and,
  - Driving shorter distances (53%).



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# National Leisure Travel Monitor

Subset Analysis: Leisure Travelers who are Interested in Visiting the Caribbean



# Methodology

- In this subset report, we analyze the values, travel trends, purchasing behavior, and media habits of leisure travelers who mention the Caribbean on an unaided basis when asked which international destinations they are interested in visiting during the next two years (12% of leisure travelers).
- Furthermore, we will examine how the target market's attitudes on key social trends compare to those of leisure travelers who do not mention the Caribbean when asked which international destinations they are interested in visiting during the next two years.
- For the sake of clarity, the target population will be referred to as leisure travelers who are Interested In Visiting The Caribbean and the comparison group will be called leisure travelers who are Not Interested In Visiting The Caribbean.



# Subset Definition

	Total Leisure Travelers <u>%*</u>	Not Interested In Visiting The Caribbean <u>%**</u>	Interested In Visiting The Caribbean <u>%***</u>
<b>Leisure Travelers Who Are:</b>			
Interested in visiting the Caribbean	12	0	100 †
Not interested in visiting the Caribbean	88	100	0 †

† Denotes statistically significant differences between the subsets of interest at 95% confidence.

\* n=2109

\*\* n=1827

\*\*\* n=282



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# Demographic Profile



# Demographics

	Not Interested In Visiting The Caribbean Profile* <u>%**</u>	Interested In Visiting The Caribbean Profile* <u>%***</u>
<b>Gender:</b>		
Women	53	56
Men	47	44
<b>Race:</b>		
White	85	74 <sup>†</sup>
African-American	6	16 <sup>†</sup>
Hispanic	4	6
Asian	2	1
Other	3	3



# Demographics

	Not Interested In Visiting The Caribbean Profile* <u>%**</u>	Interested In Visiting The Caribbean Profile* <u>%***</u>
<b>Marital Status:</b>		
Married	69	71
Divorced/separated/widowed	19	20
Single	12	9
<b>Age:****</b>		
Echo-Boomers (18-28)	8	5 <sup>†</sup>
Xers (29-42)	22	25
Boomers (43-61)	42	47
Matures (62 and older)	28	23



# Demographics

	Not Interested In Visiting The Caribbean Profile %	Interested In Visiting The Caribbean Profile %
<b>Educational Attainment:</b>		
Less than 4 years of high school	2	1
4 years of high school	17	15
1-3 years college	27	38 <sup>†</sup>
4 years college	29	18 <sup>†</sup>
1 year graduate school or more	25	28
<b>Annual Household Income:</b>		
Less than \$30,000	20	12 <sup>†</sup>
\$30,000-\$49,999	15	17
\$50,000 or more	65	71 <sup>†</sup>
\$100,000 or more	20	21
<b>Occupational Status:</b>		
White-collar (professional)	46	55 <sup>†</sup>
White-collar (other than professional)	23	23
Blue-collar	16	12
Other*	15	10 <sup>†</sup>



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# Psychographic Profile



# Self-Invention = Non-materialistic

	Not Interested In Visiting The Caribbean %	Interested In Visiting The Caribbean %
<b>Extremely/Very Important:*</b>		
Being as self-reliant as possible	69	72
Living life to the fullest	54	66 <sup>+</sup>
Being in control of your life	60	63
Being open to new ideas	49	56
Following your dreams	40	47
Staying out of a rut	36	37
Stretching yourself to try new things	32	30
Expressing your creative side	30	29
Looking stylish	9	9
Driving an expensive vehicle	4	3
Being a trendsetter	3	1
<b>Describes Me Completely/Somewhat:**</b>		
I stretch myself to try new things	26	31
I follow my dreams	28	23



# Autonomy

	Not Interested In Visiting The Caribbean %	Interested In Visiting The Caribbean %
<b>Agree:*</b>		
If I were to build or remodel a house, I would be more concerned about making the house fit the way I live rather than be concerned about the resale value	82	82
It's important to me to feel in charge of each and every part of my life	76	80
Strongly/moderately feel the need to manage my time more efficiently**	65	75 <sup>+</sup>
Lately I find I'm looking for ways of getting more control over my life	46	58 <sup>+</sup>
Strongly/moderately feel the need to know myself better**	44	49
In this world, you sometimes have to compromise your principles	37	47 <sup>+</sup>
It's more important to fit in than to be different from other people	20	19
I regularly order items that aren't on the menu in restaurants	9	6



# Enjoyment

## Things Expecting To Do This Year:\*

	Not Interested In Visiting The Caribbean %	Interested In Visiting The Caribbean %
Have more fun	52	67 <sup>+</sup>
Lose weight	59	61
Take a special vacation	56	61
Take better care of myself	62	60
Eat healthier	59	60
Get more exercise	64	59
Enjoy life more	49	57
Get more sleep at night	35	44 <sup>+</sup>
Look for ways to organize myself	24	31
Buy new furniture	16	23
Buy a computer software	10	16 <sup>+</sup>
Send more letters and greeting cards	19	13
Buy new appliances	9	13
Read the newspaper more	10	12
Buy a house	4	8
None of the above	5	2



# Enjoyment

	Not Interested In Visiting The Caribbean <u>%</u>	Interested In Visiting The Caribbean <u>%</u>
<b>Attitudes Toward Travel:</b>		
I love the idea of travel and do so whenever I have the opportunity	56	62
I like to travel, but it's such a hassle these days that I end up doing other things instead	22	24
I can take or leave travel. There are other things I'd just as soon spend my money on	21	14 <sup>†</sup>
I dislike traveling	1	0 <sup>†</sup>



# Experientialism

## Agree:\*

Even though there are many things I would like to own,  
I prefer spending my money on experiences that will  
enrich my life like travel, vacations, theatre, good  
restaurants, etc.

I prefer to go to places that are more than just  
entertainment, where I can also get a  
sense of participation

Not Interested In Visiting The Caribbean <u>%</u>	Interested In Visiting The Caribbean <u>%</u>
63	71
68	66



# Experientialism

## Things That Are Extremely Important To Me When Considering Vacation Alternatives:\*

	Not Interested In Visiting The Caribbean %	Interested In Visiting The Caribbean %
Experience new and different places and things to do	52	61 <sup>†</sup>
Spend time with family	66	58
Relax and do nothing	50	56
Head for a warm-weather climate	29	54 <sup>†</sup>
Reconnect and spend time with my spouse	41	47
Fulfill my sense for adventure	29	39 <sup>†</sup>
Spend time with the kids	37	36
Be pampered and have everything taken care of	19	33 <sup>†</sup>
Spend time with friends	43	26 <sup>†</sup>
Visit old friends out of town	33	24 <sup>†</sup>
Catch up with things to do at home	24	19
Play golf, tennis, ski, or do other sports	10	14
Learn something new	30	14 <sup>†</sup>
Celebrate holidays	22	13 <sup>†</sup>
Have some time away from the kids	10	9
None of these	3	0 <sup>†</sup>



# Family

## Agree:

I wish my family spent more time doing things together as a group\*

I wish I had more time to just sit and talk to my kids\*

All/most of my satisfaction comes from my home and family\*\*

	Not Interested In Visiting The Caribbean <u>%</u>	Interested In Visiting The Caribbean <u>%</u>
I wish my family spent more time doing things together as a group*	70	70
I wish I had more time to just sit and talk to my kids*	62	61
All/most of my satisfaction comes from my home and family**	63	58



# Personalization/Customization

	Not Interested In Visiting The Caribbean %	Interested In Visiting The Caribbean %
<b>Agree:*</b>		
When something is really important to me, I'm willing to take the time to devise options and solutions that work just for me	93	93
Businesses care more about selling me products and services that already exist rather than coming up with something that really fits my lifestyle	66	67
Most of the time, the service people whom I deal with for the products and services that I buy don't care much about me or my needs	64	60
I would be willing to pay as much as 10% more for some of the things I buy if I were guaranteed better service	36	41
I would be willing to pay as much as 20% more for a product or service that was customized to my specifications	20	23



# Appearance

**Agree:\***

Strongly/moderately feel the need to try to improve my physical appearance\*\*

I think my looks are above average

I am trying to look younger

I'll do whatever I can to look as young as possible

Not Interested In Visiting The Caribbean %	Interested In Visiting The Caribbean %
67	73
33	36
26	34
24	31



# Sophistication

	Not Interested In Visiting The Caribbean %	Interested In Visiting The Caribbean %
<b>Strongly Suggests Someone Is Sophisticated And Knowledgeable:*</b>		
Being well-read in a variety of subjects	74	74
Knowing where to find the best information sources	66	66
Knowing about little-known but "in" places around the world	42	54 <sup>†</sup>
Knowing about the best places to eat locally and in nearby cities	47	52
Knowing how to make "the system" work for them	43	48
Having the inside scoop on a lot of things	40	44
Having the confidence to defy convention	49	42
Knowing about what's "hot" before others	26	29



# Status

## Agree:\*\*

I work hard at coming out on top in every situation—from the least important to the most important

Not Interested In Visiting The Caribbean <u>%*</u>	Interested In Visiting The Caribbean <u>%*</u>
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44

53<sup>+</sup>

## Associate With Success And Accomplishment:

Having people respect me  
 Having a happy marriage  
 Being a good parent  
 Being in control of my life  
 Adhering to high moral standards  
 Having successful children  
 Being able to buy what I want  
 Being extremely successful at my job  
 Taking frequent pleasure trips  
 Traveling domestically  
 Having a successful investment strategy  
 Traveling internationally  
 Having a graduate college degree  
 Being wealthy

77

82

81

81

85

81

74

79

75

78

55

57

46

55<sup>+</sup>

39

48<sup>+</sup>

28

48<sup>+</sup>

37

45

31

43<sup>+</sup>

27

32

31

29

16

25<sup>+</sup>



# Distrust

	Not Interested In Visiting The Caribbean %	Interested In Visiting The Caribbean %
<b>Agree:*</b> I am skeptical about the accuracy of news stories and information presented in the media	79	77
<b>Frequently/Occasionally:**</b> Leave the room during commercials	84	82
Flip channels during commercials	72	76
Turn down the sound during commercials	51	43
Edit out commercials with a TiVo or a similar device	22	20
<b>Agree:***</b> I am interested in products and services that enable me to block, skip, or opt out of being exposed to marketing and advertising	56	57
The amount of marketing and advertising today is out of control	60	52
I have taken steps to reduce the amount of marketing and advertising I am exposed to	45	41
I would be willing to pay more for traditionally free media like network TV and radio in order to avoid all commercials	22	18



# Stress

	Not Interested In Visiting The Caribbean %	Interested In Visiting The Caribbean %
<b>Agree:*</b> There seem to be more things to worry about today than there were just a few years ago	87	91
More and more, I find I am looking for ways of simplifying my life	74	81
Life today has become much too complicated	76	73
More and more, I look to religion as a source of comfort in my life	62	57
Strongly/moderately feel the need to find ways of reducing stress in my life**	55	56



# Stress

## Areas More Stressful Than A Year Ago:\*

	Not Interested In Visiting The Caribbean %	Interested In Visiting The Caribbean %
Money concerns	35	41
Weight	40	40
Personal health	34	38
Planning for the future	26	37 <sup>†</sup>
Work/job	30	36
Household tasks	21	24
Personal safety	14	18
Personal life	22	18
Parents	15	17
Children	19	16
Marriage	10	9
School	4	1 <sup>†</sup>
Don't feel that I am under any stress	19	10 <sup>†</sup>



# Stress

	Not Interested In Visiting The Caribbean <u>%</u>	Interested In Visiting The Caribbean <u>%</u>
<b>Agree:*</b> Strongly/moderately feel the need to reduce my debt level**	58	63
My lifestyle would be seriously affected if the economy takes a downturn	50	57
The "American Dream" has become impossible for most people to achieve	57	55
In the year 2010, the economy will be as good as it is today or better	45	37



# Stress

	Not Interested In Visiting The Caribbean %	Interested In Visiting The Caribbean %
<b>Agree:*</b>		
I am grateful to any product or brand that makes it easier for me to get several things done at the same time	83	87
It seems that I'm always doing more than one thing at a time	79	77
I feel like I don't have enough time	64	69
I feel like I don't have enough time just for me	53	66 <sup>†</sup>
These days I have less and less time for myself	55	58



# Consumer Empowerment

	Not Interested In Visiting The Caribbean %	Interested In Visiting The Caribbean %
<b>Agree:*</b>		
It's usually not necessary to pay full price for most products; you can almost always find things at a discount or on sale	91	90
I feel more knowledgeable and powerful today about what I buy than ever before	81	78
When making decisions about the products and services I buy, I usually go with my gut feelings, even if friends and family disagree	62	70 <sup>†</sup>
I always know how to get the information I need to make decisions	69	67



# Strategic Control

	Not Interested In Visiting The Caribbean %	Interested In Visiting The Caribbean %
<b>Agree:*</b>		
Americans should be more active in protecting the environment	88	93
Strongly/moderately feel the need to take measures to simplify my life**	61	67
I have a great need to get rid of some of the nonessentials in my life	48	55
Strongly/moderately feel the need to become more involved in the life of my neighborhood or community**	41	47
I'm overwhelmed by all of the sources of information available today	41	42



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# Behavioral Profile



# Incidence of Travel

Mean for all leisure travelers who took  
one or more trips

Not Interested In Visiting The Caribbean <u>Mean</u>	Interested In Visiting The Caribbean <u>Mean</u>
3.5	3.4



# Incidence of Travel

	Not Interested In Visiting The Caribbean <u>%</u>	Interested In Visiting The Caribbean <u>%</u>
<b>Weekend Trip Incidence:*</b>		
One or more	64	70
None	36	30
Mean for all leisure travelers who took one or more trips**	2.9	2.5 <sup>†</sup>
Share of all trips	54	51



# Incidence of Travel

	Not Interested In Visiting The Caribbean %	Interested In Visiting The Caribbean %
<b>Extended Trip (5+ Consecutive Nights) Incidence:*</b>		
One or more	50	55
None	50	45
Mean for all leisure travelers who took one or more trips**	1.9	2.1
Share of all trips	27	34 <sup>†</sup>



# Types of Leisure Trips

## Primary Purpose Of One Or More Trips During The Last 12 Months:\*

	Not Interested In Visiting The Caribbean %	Interested In Visiting The Caribbean %
Naturalistic (net)	35	43
Beach/lake	24	35 <sup>†</sup>
Camping/hiking/climbing	12	11
Fishing	4	4
Adventure/outfitter	3	3
Snow skiing/boarding	2	1
Visiting friends/relatives	48	41
Cruise	11	18 <sup>†</sup>
General sightseeing	26	15 <sup>†</sup>
Gambling	10	14
Theme park	10	11
City	11	11
Family reunion	10	9
All-inclusive resort	5	9

## During The Past 12 Months, Have Taken A Leisure Trip To:

Attend a religious ceremony or event	13	14
Help less fortunate people or support a humanitarian cause	5	5



# Composition of Leisure Trip Party

## Took One Or More Trips During The Last 12 Months:

- With spouse or another adult without children
- With children (net)
  - With a spouse or other adult with children
  - With children only (and no spouse or other adult)
- Alone

	Not Interested In Visiting The Caribbean <u>%*</u>	Interested In Visiting The Caribbean <u>%*</u>
With spouse or another adult without children	61	65
With children (net)	37	50 <sup>†</sup>
With a spouse or other adult with children	33	44 <sup>†</sup>
With children only (and no spouse or other adult)	5	8
Alone	25	23



# Future Patterns/Preferences

	Not Interested In Visiting The Caribbean <u>%</u>	Interested In Visiting The Caribbean <u>%</u>
<b>Planned Trips:</b>		
More	27	34 <sup>†</sup>
The same	57	54
Fewer	15	12
I am not planning to take any leisure trips during the next 12 months	1	0 <sup>†</sup>



# Future Patterns/Preferences

	Not Interested In Visiting The Caribbean %	Interested In Visiting The Caribbean %
<b>Reasons For Taking Fewer Leisure Trips:*</b>		
The overall cost of leisure travel is too high	9	40 <sup>+</sup>
The current economic conditions make it difficult for me to travel	20	16
Not able to get away from my job/work/less vacation time	12	14
Have projects/things I need to do at home	15	13
There are other things I'd rather do with my vacation/leisure time other than travel	12	7
The price of gasoline is too high	10	7
Air travel is too big of a hassle	5	1 <sup>+</sup>
Age or health concerns	4	0 <sup>+</sup>
New baby/children in general/family obligations	3	0 <sup>+</sup>
Planning for a big trip/expensive trip	2	0 <sup>+</sup>
I believe it is not safe to travel	2	0 <sup>+</sup>
No special occasions	1	0
Haven't Planned yet	1	0
I believe it is not safe to fly	0	0
Other	4	2



# Accommodations Patterns/Preferences

	Not Interested In Visiting The Caribbean <u>%</u>	Interested In Visiting The Caribbean <u>%</u>
<b>When Traveling For Leisure, Prefer:</b>		
Chain hotels/motels	85	83
Independent hotels/motels	15	17
Economy	20	16
Moderate	66	64
Luxury	14	20 <sup>†</sup>
Traditional	76	67 <sup>†</sup>
All-suite	24	33 <sup>†</sup>
Full-service hotel/motel with a restaurant	64	81 <sup>†</sup>
Limited-service hotel/motel without a restaurant	36	19 <sup>†</sup>
A hotel/motel with fewer than 300 rooms	85	77 <sup>†</sup>
A hotel/motel with 300 or more rooms	15	23 <sup>†</sup>



# Hotel/Resort Selection Decision Factors

	Not Interested In Visiting The Caribbean %	Interested In Visiting The Caribbean %
<b>Extremely/Very Influential:**</b>		
The location of the hotel	83	93 <sup>†</sup>
A previous experience with the hotel	81	92 <sup>†</sup>
A previous experience with the hotel chain	81	90 <sup>†</sup>
The reputation of the hotel or resort	76	87 <sup>†</sup>
Value for the price	81	87
The reputation of the hotel chain	72	86 <sup>†</sup>
Room rate	83	85
Offers late check-out a no extra charge	50	81 <sup>†</sup>
Quiet or soundproofed guest rooms/noise-reduction windows and walls	66	67
Brand name of the hotel/resort	50	66 <sup>†</sup>
Premium quality mattress and bed linens	60	65
The recommendation of a friend or associate	60	65
The likelihood of being upgraded to a better room or accommodation	50	60
Getting a free breakfast included with the room rate	50	57



# Hotel/Resort Selection Decision Factors

	Not Interested In Visiting The Caribbean %	Interested In Visiting The Caribbean %
<b>Extremely/Very Influential:**</b>		
Things seen or read about the hotel on the hotel's Web site	35	54 <sup>†</sup>
Gives both airlines miles and frequent-guest points	28	44 <sup>†</sup>
Things seen or read about the hotel on an online travel agency Web site like Expedia or Travelocity	28	44 <sup>†</sup>
Free Internet access from public areas such as the lobby or pool	32	42
Things seen or read in the media about the hotel or chain	29	39
Free Internet access from the guest rooms	37	37
Gives hotel frequent guest points for each stay	30	36
Gives airline miles for each stay	20	36 <sup>†</sup>
The recommendation of a travel agent	27	33
Things seen or read about the hotel on a Web log or "blog" online	22	32
Provides a complimentary newspaper of your choice daily	19	21
Flat screen television in guest room	20	17



# Transportation Patterns/Preferences

## Preferred Air Carrier

### Prefer:

Low Cost Carrier

Legacy or Full-Service Carrier

I have no preference

	Not Interested In Visiting The Caribbean <u>%</u>	Interested In Visiting The Caribbean <u>%</u>
	27	27
	20	24
	53	49



# Preferred Hotel Brands (Unaided)

	Not Interested In Visiting The Caribbean <u>%*</u>	Interested In Visiting The Caribbean <u>%*</u>
<b>Hotel/Motel Brands:</b>		
Marriott	30	35
Hilton	26	29
Holiday Inn	27	28
Hyatt	9	11
Best Western	13	9 <sup>†</sup>
Comfort Inn	9	9
Ramada	6	9
Sheraton	8	9
Hampton	10	6 <sup>†</sup>
Holiday Inn Express	7	5
Embassy Suites	6	5
No preference	10	11



# Preferred Airline Brands (Unaided)\*

	Not Interested In Visiting The Caribbean <u>%**</u>	Interested In Visiting The Caribbean <u>%**</u>
<b>Airline:</b>		
Southwest	33	43 <sup>†</sup>
American	30	41 <sup>†</sup>
United	32	31
Delta	35	29
Continental	11	19 <sup>†</sup>
US Airways/America West	12	15
JetBlue	5	12 <sup>†</sup>
Northwest	14	8
Hawaiian	1	5 <sup>†</sup>
Lufthansa	2	5
Alaska	5	4
Midwest	2	4
Spirit	0	4
No preference	15	9 <sup>†</sup>



# Confidence in Selected Information Sources\*

	Not Interested In Visiting The Caribbean %	Interested In Visiting The Caribbean %
<b>When Considering Vacation Destinations, Extremely/Very Confident In:**</b>		
Recommendations of a friend or family member	79	85
Information on the Web site of an online travel agency such as Expedia, Travelocity, etc.	46	54
Information in travel guidebooks	44	49
Recommendations of a travel agent	39	47
Articles in newspapers and magazines or programs on TV and radio	28	41 <sup>†</sup>
Information on a company or destination Web site	33	38
Information in travel brochures	29	36
Reviews you have read in an online advisory site such as TripAdvisor.com	26	26
Reviews you have read on a Web log or "blog" online	20	22
Information in travel advertising	12	21



# Attitude Toward Traditional Information Sources

	Not Interested In Visiting The Caribbean %	Interested In Visiting The Caribbean %
<b><u>Among Leisure Travelers:</u></b>		
<b>Used A Traditional Travel Agent During The Last 12 Months:</b>		
<b>To obtain travel information and prices</b>		
One or more trips	18	29 <sup>†</sup>
Share	8	13 <sup>†</sup>
Mean*	1.6	1.5
<b>To make a travel reservation</b>		
One or more trips	16	27 <sup>†</sup>
Share	7	14 <sup>†</sup>
Mean*	1.6	1.8



# Attitude Toward Traditional Information Sources

## Among Airline/Hotel Users:

### Used A Traditional Travel Agent During The Last 12 Months:

#### To obtain travel information

One or more trips  
 Share  
 Mean\*

#### To make a travel reservation

One or more trips  
 Share  
 Mean\*

	Not Interested In Visiting The Caribbean %	Interested In Visiting The Caribbean %
One or more trips	29	37
Share	11	14
Mean*	1.6	1.5
One or more trips	27	39 <sup>†</sup>
Share	10	20 <sup>†</sup>
Mean*	1.6	2.0



# Attitude Toward Traditional Information Sources

## Among Airline/Hotel Users:

### **Plan To Use A Traditional Travel Agent In The Next 12 Months:\***

One or more trips

Mean\*\*

Not Interested In Visiting The Caribbean %	Interested In Visiting The Caribbean %
--	---

29

39<sup>†</sup>

3.4

1.8<sup>†</sup>



# Perceived Influence of Traditional Travel Agents\*

	Not Interested In Visiting The Caribbean %	Interested In Visiting The Caribbean %
<b><u>Among Airline/Hotel Users:</u></b>		
<b>Influential:**</b>		
Overall influence	60	44 <sup>†</sup>
Hotel or resort	56	58
Travel insurance	34	55 <sup>†</sup>
Vacation package or tours	43	53
Airline	58	45
Destination	38	35
Cruise line	46	30
Car rental company	34	23
Train	26	22 <sup>***</sup>



# Use of Technology as an Information Source

	Not Interested In Visiting The Caribbean %	Interested In Visiting The Caribbean %
<b>Used The Internet Or An Online Service For A Leisure Trip In The Last 12 Months To:</b>		
Obtain travel information and prices Average number of trips*	64 2.7	71 <sup>†</sup> 2.9
Make a travel reservation Average number of trips*	55 2.5	67 <sup>†</sup> 2.6
<b>Checked A Hotel/Resort Rate Online Before Calling A Hotel Or Resort To Make A Reservation In The Last 12 Months:**</b>	43	54 <sup>†</sup>
<b>Checked An Airfare Online Before Calling An Airline To Make A Reservation In The Last 12 Months:**</b>	41	42
<b>Checked Prices For Any Travel Services Online Before Calling A Travel Agent To Make A Reservation In The Last 12 Months:***</b>	31	42 <sup>****</sup>



# Attitude Toward Online Information Sources

	Not Interested In Visiting The Caribbean %	Interested In Visiting The Caribbean %
<b>Used The Internet Or An Online Service For A Leisure Trip In The Last 12 Months To Make:*</b>		
Hotel/resort reservations	74	72
Airline reservations	58	67 <sup>†</sup>
Car rental reservations	33	33
Complete vacation package	12	24 <sup>†</sup>
Cruise reservations	7	17 <sup>†</sup>
<b>Average Number Of Web Sites Visited Prior To:*</b>		
Making a hotel/resort reservation online	2.8	3.3
Making an airline reservation online	2.7	3.2 <sup>†</sup>
Making a car rental reservation online	1.5	1.6



# Attitude Toward Online Information Sources

**Have Visited A Web log Or "Blog" To Seek And/Or Review Information About A Destination Or Travel Service Supplier During The Last 12 Months:\***

Not Interested In Visiting The Caribbean <u>%</u>	Interested In Visiting The Caribbean <u>%</u>
19	22



# Attitude Toward Online Information Sources

## Blogs Visited:\*

	Not Interested In Visiting The Caribbean %	Interested In Visiting The Caribbean %
TripAdvisor.com	43	51 **
Traveller.org	17	28 **
MySpace.com	16	20 **
VirtualTourist.com	15	19 **
Ysearchblog.com (Yahoo! Search Blog)	26	15 **
LonelyPlanet.com	13	8 **
Xanga.com	12	5 **
Facebook	10	3 **
Travelblog.org	7	0 **
Google	6	0 **
LiveJournal.com	4	0 **
Travelocity	1	0 **
Cruise Critic	1	0 **
Expedia	1	0 **
Other	13	15 **



# Sources of Information Typically Used When Searching Vacation Options Online\*

## Interested In Visiting The Caribbean

	<u>First</u> <u>%</u>	<u>Second</u> <u>%</u>	<u>Third</u> <u>%</u>
<b>Vacation Destinations Online:</b>			
The Web site of an online travel agency like Expedia, Travelocity, Priceline, etc.	34 †	23	19
A search engine like Google, Yahoo or MSN, etc.	29	21	14
The Web site of a specific national tourist office, convention or visitors bureau or destination promotion board	21	25	26
The Web site of an individual hotel or resort	6	10	22
The Web site of a specific hotel chain	3	19	15
A Web log or "blog"	1	2	2
Other	6	0 †	2



# Attitude Toward Online Information Sources

## Web Sites Used To Obtain Travel Information And Prices:\*\*

	Not Interested In Visiting The Caribbean %*	Interested In Visiting The Caribbean %*
Travelocity.com	53	66 <sup>+</sup>
Expedia.com	55	63 <sup>+</sup>
Google	50	53
Specific airline brand Web site	47	53
Specific hotel brand Web site	43	49
Orbitz.com	41	43
Cheaptickets.com	26	38 <sup>+</sup>
Hotels.com	35	38
AAA.com (Triple A Web site)	25	38 <sup>+</sup>
Priceline.com	30	36
City, state or country promotion board specific Web site	26	33
Yahoo Travel	22	26
Hotwire.com	21	26
Specific car rental brand Web site	23	23
Specific cruise brand Web site	12	19 <sup>+</sup>
TravelZoo.com	9	15 <sup>+</sup>
TripAdvisor.com	9	14 <sup>+</sup>
Specific tour operator or vacation packager Web site	11	10
Americanexpress.com	8	9
AOL travel	9	9
Lastminutetravel.com	5	8
Vacation Rental By Owner (VRBO)	6	7
Trip.com	4	7
Kayak.com	5	7
SmarterTravel.com	2	5
SideStep.com	3	5



# What People Are Looking For In A Leisure Travel Experience\*

	Not Interested In Visiting The Caribbean %	Interested In Visiting The Caribbean %
<b>Experimentation/Fantasy/Ambiance:**</b>		
Beautiful scenery	70	71
A place I have never visited before	66	66
A beach experience	46	65 <sup>†</sup>
Going to theme parks	33	40 <sup>†</sup>
A hotel with casually elegant atmosphere and décor	36	39
Nightlife and live entertainment	23	37 <sup>†</sup>
Going to a destination spa that offers complete spa and wellness programs	16	33 <sup>†</sup>
A historic hotel or resort (one that is on the National Register of Historic Places)	31	33
Going to an amenity spa that is part of a hotel, resort or cruise ship	21	32 <sup>†</sup>
A hotel or resort with a distinctive theme or atmosphere	21	31 <sup>†</sup>
Being able to gamble	18	29 <sup>†</sup>
An opportunity to eat different and unusual cuisines	39	29 <sup>†</sup>
A hotel with a formal and elegant atmosphere and décor	19	28 <sup>†</sup>
Learning a new skill or activity	18	22
A small "boutique" hotel with unusual atmosphere and décor	19	18
Recreational boating	16	17
A resort that offers a nude recreation experience	10	16 <sup>†</sup>



# What People Are Looking For In A Leisure Travel Experience\*

	Not Interested In Visiting The Caribbean %	Interested In Visiting The Caribbean %
<b>Physical Activities:**</b>		
Snorkeling or scuba diving	23	44 <sup>†</sup>
Hiking and outdoor adventure	30	33
Participation in water sports	17	29 <sup>†</sup>
Fishing	18	23
Whitewater rafting	15	16
Snow skiing/snow boarding	10	14
Playing golf	9	11
Bicycling trips through the countryside	20	9 <sup>†</sup>
Hunting	10	8
Mountain biking	10	5
Playing tennis	4	5



# What People Are Looking For In A Leisure Travel Experience

	Not Interested In Visiting The Caribbean <u>%</u>	Interested In Visiting The Caribbean <u>%</u>
<b>Familiarity/Control:**</b>		
Safety of destination	76	88 <sup>†</sup>
Security provided by the hotel or motel	61	62
A place I have visited before	51	62
Having access to the Internet or an online service from my hotel room	39	44



# What People Are Looking For In A Leisure Travel Experience\*

	Not Interested In Visiting The Caribbean %	Interested In Visiting The Caribbean %
<b>Pricing:**</b> An all-inclusive resort price (one that includes accommodations, food, beverage and recreation)	44	67 <sup>†</sup>
An all-inclusive vacation price (one that includes air transportation, accommodations, food, transfer to the hotel or resort and some recreation)	48	65 <sup>†</sup>



# What People Are Looking For In A Leisure Travel Experience

	Not Interested In Visiting The Caribbean %	Interested In Visiting The Caribbean %
<b>Other Activities:**</b>		
Having enough time just to relax and unwind	79	89 <sup>†</sup>
Hotels/resorts that offer special rates for kids***	54	48
Hotels/resorts that offer special accommodations for kids***	45	43
A hotel having a kids club or organized family activities***	35	43
Visiting architectural or historical sites	47	42
Visiting museums	40	37
Attending performing arts	27	34
Shopping	32	34
Having separate children's and teen programs	19	26
Attending amateur or professional sporting events	19	21



# What People Are Looking For In A Leisure Travel Experience

## Interest In Gay Or Lesbian Travel Offerings

	Not Interested In Visiting The Caribbean %	Interested In Visiting The Caribbean %
<b>Interested In Gay Or Lesbian Travel Offerings:</b>		
Yes	4	6
No	96	94



# Familiarity with Timesharing vs. Vacation Ownership

	Not Interested In Visiting The Caribbean %	Interested In Visiting The Caribbean %
<b>Familiarity With:</b>		
Timesharing	90	92
Vacation ownership	61	66
<b>Extremely/Very Familiar With:*</b>		
Whole ownership, such as a second home, condominium, etc.	42	46
Fixed week ownership	28	37 <sup>†</sup>
Floating week ownership	25	35 <sup>†</sup>



# Timesharing/Vacation Ownership Issues\*

	Not Interested In Visiting The Caribbean %	Interested In Visiting The Caribbean %
<b>Opinion Of Timesharing:**</b>		
Positive	14	13
Neutral	31	37
Negative	55	50
<b>Likelihood Of Staying At A Timeshare Or Vacation Ownership Resort:***</b>		
Likely	19	32 <sup>†</sup>
Neutral	15	13
Unlikely	66	55 <sup>†</sup>



# Alternative Accommodations Patterns/Preferences

## Ownership Of Timeshare Or Vacation Time\*

	Not Interested In Visiting The Caribbean <u>%</u>	Interested In Visiting The Caribbean <u>%</u>
<b>Own Timeshare Or Vacation Time:</b>		
Yes	14	16
No	86	84



# Timeshare Purchase Interest

	Not Interested In Visiting The Caribbean %	Interested In Visiting The Caribbean %
<b>Overall Interest In Purchase During The Next Two Years:</b>		
Among those who are familiar with timeshare	5	10 <sup>†</sup>
Among those who are familiar with timeshare and currently do not own timeshare	4	7



# Where People Want To Go

## Interest in Visiting International Destinations During the Next 2 Years (Unaided)

<b>Area/Region:</b>	Not Interested In Visiting The Caribbean <u>%*</u>	Interested In Visiting The Caribbean <u>%*</u>
Caribbean	0	100 <sup>†</sup>
Europe	61	48 <sup>†</sup>
Australia	19	21
Mexico	8	21 <sup>†</sup>
Canada	12	20 <sup>†</sup>
South/Central America	6	14 <sup>†</sup>
Africa	6	7
Far East	15	6 <sup>†</sup>
South Pacific	7	6
Middle East	5	4
Net interest in international travel	78	100 <sup>†</sup>
Have taken an international leisure trip during the past 12 months	19	33 <sup>†</sup>



# Where People Want To Go

## Interest in Visiting Europe During the Next 2 Years (Unaided)

	Not Interested In Visiting The Caribbean <u>%*</u>	Interested In Visiting The Caribbean <u>%*</u>
<b>Country:</b>		
Europe (net)	61	48 <sup>†</sup>
Italy	20	17
England	23	14 <sup>†</sup>
Spain	9	12
Germany	15	12
France	16	11 <sup>†</sup>
Ireland (Republic of and Northern)	10	10
Switzerland	6	5
Austria	4	5
Greece	7	4 <sup>†</sup>



# Cruises

## Interest In Taking A Cruise During The Next Two Years:\*

Interested

Neutral

Not interested

	Not Interested In Visiting The Caribbean <u>%</u>	Interested In Visiting The Caribbean <u>%</u>
	42	64 <sup>†</sup>
	14	13
	44	23 <sup>†</sup>



# Passport Issues

	Not Interested In Visiting The Caribbean %	Interested In Visiting The Caribbean %
<b>Currently Have A Valid Passport:</b>		
Yes	55	63 <sup>†</sup>
No, I never had a passport	34	28 <sup>†</sup>
No, my passport has expired	11	9
<b>Plan To Re-Validate Passport Or Apply For New One:*</b>		
Yes	32	57 <sup>†</sup>
No	68	43 <sup>†</sup>
<b>As A US Citizen, Need A Passport to RE-ENTER The United States When:**</b>		
Traveling by air	83	85
Traveling on a cruise ship	75	81 <sup>†</sup>
Traveling in personal or rented automobile, truck, SUV or RV	67	70



# Various Vacation Habits

	Not Interested In Visiting The Caribbean %	Interested In Visiting The Caribbean %
<b>Agree:*</b>		
I feel more rested and relaxed when I return from vacation	52	61 <sup>†</sup>
I eat more on vacation	51	57
I sleep later on vacation	49	53
I feel more romantic on vacation	42	48
I drink more on vacation	32	44 <sup>†</sup>
I don't use all of the vacation time to which I am entitled	26	42 <sup>†</sup>
I always feel like I need a vacation	36	40
I make love more often on vacation	30	38
I generally overindulge on vacation	28	36
A vacation is a birthright	23	30
I would be willing to trade an increase in my pay for an increase in my vacation time	24	24
I stay in touch with my office/business while on vacation	13	14
I do some work while on vacation	11	12



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# Green Travel

**Environmentally Conscious:**

Not Interested In Visiting The Caribbean <u>%</u>	Interested In Visiting The Caribbean <u>%</u>
85	87



# Green Travel

## Activities Participate In To Be More Environmentally Conscious:\*

	Not Interested In Visiting The Caribbean %	Interested In Visiting The Caribbean %
Turn off the lights when leave the room	87	89
Be energy efficient at home by regulating air conditioning/heating when not at home	84	88
Recycle and/or compost trash	81	86 <sup>†</sup>
Shut off water while brushing teeth/shaving	76	81
Use more energy efficient light bulbs instead of regular light bulbs	77	81
Keep showers short	73	72
Read books/magazines or watch movies/videos about nature or the environment	68	70
Buy environmentally safe household products, even if they cost more	56	63 <sup>†</sup>



# Green Travel

## Activities Participate In To Be More Environmentally Conscious:\*

Plant trees (yourself or support programs that do this)  
Walk or bike instead of drive whenever possible  
Donate funds to nature-related or environmental organizations  
Teleconference and/or videoconference to avoid travel whenever possible  
Use public transportation whenever possible  
Car pool  
Invest in companies that are developing alternative energy sources (e.g., corn converted to fuel)  
Belong to environmental organizations such as World Wildlife Fund, Greenpeace, The Sierra Club  
Participate in carbon offsetting programs  
Use solar or wind powered energy sources  
Drive a hybrid car  
None of the above

	Not Interested In Visiting The Caribbean %	Interested In Visiting The Caribbean %
	59	62
	47	46
	39	40
	32	37
	34	30
	31	30
	24	25
	16	20
	12	17 <sup>†</sup>
	13	17
	5	5
	1	0



# Green Travel

	Not Interested In Visiting The Caribbean %	Interested In Visiting The Caribbean %
<b>Definitely/Probably Would Select A Travel Supplier With Concern For The Environment:*</b>	40	48 <sup>†</sup>
<b>Willingness To Pay Higher Rates/Fares To Use A Travel Supplier With Concern For The Environment:</b>	47	53
<b>Maximum Additional Percentage Per Usage Willing To Pay Up To \$500 To Patronize A Travel Supplier With Concern For The Environment:**</b>		
Less than 5%	18	21
5% to 9%	44	46
10% to 14%	23	21
15% to 19%	7	9
20% or more	8	3 <sup>†</sup>



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# Conclusions and Implications