



# Enlightening Tourism.

## A Pathmaking Journal



Universidad  
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## SEGMENTING THE U.S.A. NON-TRAVEL MARKET

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### ABSTRACT

*Tourism marketers focus on understanding the many different segments that comprise their visitors. Understanding these segments' motivations for travel is important in order to motivate repeat visitation and to attract like-minded consumers to visit. But how about those who do not travel? This surprisingly large percentage of the population is a lost opportunity for the industry. The research that follows, based upon a very significant USA-based sample of non-travelers, suggests that non-travelers can be effectively segmented and targeted. Understanding these segments will better allow vacation marketers to craft their product and their message, hopefully bringing more travelers to the mix.*

### KEY WORDS

*Non-travel; travel motivations; segmentation analysis; ethnicity.*

### ECONLIT KEYS

*L830; M310.*

## **1. INTRODUCTION**

Researchers have regularly noted that a quarter to a third of a developed nation's population does not travel for vacation purposes. While a portion of this population may not have the ability or willingness to purchase travel products; what if there are under-served segments of the group that would be willing to purchase if the right travel products were created for them? While the preponderance of the studies have focused on understanding the motives and decision-making of travelers (Pike 2006), there remains much to explore to help us to better understand the motives of non-travelers.

The non-travel segment is surprising large. A good deal of research has confirmed the size of the segment. Smith and Carmichael (2005) reported that one in three Canadians had not taken an overnight trip [at least 80 km] during the years 1999-2000. McKercher (2009) found Hong Kong non-travel rates that ranged from 34% in 2000, to 27% in 2004; with the non-traveler defined by McKercher (2009) as one who had neither taken a pleasure trip over the past twelve months nor intended to do so in the following twelve. Though one typically thinks of Europeans as heavy travelers, a 1988 study, based upon Commission of European Communities (1986) data, noted that 44% of the continent's population had not taken a three-nights or longer holiday away from their usual place of residence during the previous year. With findings in the same range as the above-mentioned studies, Jackson, Schmeirer and Nicol (1997) reported that 38% of Australians had failed to take a vacation trip during the previous five years. A final example, derived from data extracted from the most recent (2006) Travel Activities and Motivations Survey (TAMS), a significant periodic data collection exercise of Statistics Canada that serves as the foundation of the research that follows, revealed 21% of adult Americans [USA] had not taken an overnight trip during the previous two years. Assuming this number has held reasonably steady, given a current USA population estimate of 311 million (U.S. Census Bureau 2011), non-travelers thus represent a potential market of over 65 million people. While a large proportion of that population

may not be able to travel for a variety of reasons (such as income, health or lack of interest), it is likely that a percentage of the group has the means and ability to travel, but has opted not to do so. If researchers could isolate and more fully understand this segment, perhaps products and services could be developed to better meet their needs and convert them to travelers.

## **2. LITERATURE**

A small number of studies, the earliest of which date back but twenty years, have sought to build our understanding of the non-traveler segment. Haukeland's (1990) seminal qualitative research resulted in a typology based upon several socio-demographic and situational variables. These included age, income, personal health, and familial situation. Haukeland's (1990) study yielded a useful 2x2 model. This incorporated a Y axis anchored by the variables 'restrained' and 'unrestrained' *social factors*, and an X axis that divided non-travelers based upon 'restrained' versus 'unrestrained' *economic factors*. Placement of non-travelers within one of the four quadrants provided a framework for study as to why members of each segments had opted not to travel. Smith, Litvin and Nadav (2009) replicated Haukeland's (1990) work, successfully applying Haukeland's qualitatively derived model in a quantitative study. A non-travel study by Caldow (1997) sought to explain why would-be Australian eco-tourists had not traveled. Caldow (1997) noted that the two primary reasons provided for not having traveled were work commitments and a lack of money. However, none of these three studies (Caldow, 1997; Haukeland, 1990; Smith, Litvin & Nadav, 2009) helped one understand why non-travel rates were as high as they were. Smith and Carmichael (2005) sought to close this lacuna. Based upon analysis of an earlier [2000] TAMS study, these authors developed a non-travel index intended to aid understanding of the causes for non-travel. Smith and Carmichael's (2005) index, modified and adopted by Statistics Canada and incorporated in the 2006 TAMS instrument, allowed for specific measures of non-travel not previously available to researchers at a nationally representative level. The research that follows utilized 2006 TAMS data, specifically the

Smith and Carmichael (2005) explanatory non-travel queries incorporated therein, providing a greater understanding of those factors that affect one's decision not to travel.

The tourism consumer behavior literature has centered on understanding the ways in which customers select, use and evaluate products, with little exploration as to why they do not; an understanding of which is integral to the success of any business (Morrison, 1996). An assumption of much of the tourism literature, and a shortcoming thereof, as noted by both Mansfield (1992) and McKercher (2009), has been the general presumption that those people who want to travel, given a viable option, will choose to do so; while those that do not, again given a viable option, fail to do so merely because they do not have 'the travel bug' (McKercher, 2009). The discussion that follows expands on this criticism, and further establishes the complexity of the issue as to why a sizable percentage of people, in this case some 65 million Americans, do not travel.

### **3. RESEARCH METHOD**

As noted, this study employed data extracted from the most recent (2006) Travel Activities and Motivations of U.S. Residents (TAMS) study. TAMS is an extensive periodic Canadian governmental travel research exercise. The 2006 TAMS study, conducted between January and June 2006, "examined the recreational activities and travel habits of Americans looking at their travel behavior" for the years 2004-2005 (Ontario Ministry of Tourism 2007:8). While somewhat dated, a strength of these TAMS data are that they were collected during a period a relative economic stability. TAMS employed a panel design with a mail back survey. The exercise garnered a response rate of 71% and yielded a sample of over 60,000 respondents. Non-travelers in the dataset (21%; n=12,282) were defined, as had McKercher (2009), as those who had not traveled for vacation purposes over a two-year time frame. [As noted above, McKercher's two-year time frame encompassed the past twelve and next twelve months. This definition is less than ideal, relying as it does on travel intention rather than travel behavior as half the metric. For the current study, non-travelers were defined as those who had not taken an overnight trip during the previous two years, without

considering following year’s intent.] Due to the large sample size, 35% of the fully completed responses were randomly drawn from the sample population, resulting in a workable sample of 4,317 non-traveler subjects. Contingency tables,  $\chi^2$  and ANOVAs were conducted to test for any significant differences between the extracted sample and the full population of non-travelers. None were found. Non-travelers were then segmented into groups to help understand reasons for non-travel and to identify characteristics that could potentially be considered by tourism marketers attempting to convert USA non-travelers into travelers.

Analysis began with the development of an overall profile of non-travelers using univariate analysis. Segmentation analysis was then conducted using cluster analysis. Nonhierarchic clustering K-Means was employed as such a method is best suited for studies with large data sets as their purpose is to reduce the data via the creation of uniform groups under the premise that there must be maximum intergroup and minimum intragroup variances (Carmichael, Smith & Cannally 2006). Because an *a priori* decision had not been made regarding the number of groups, clustering analyses with varying numbers of groups (2–6 groups, using SPSS 12.0 Quick Cluster) were computed. The solutions were analyzed using bivariate analysis (chi-square in conjunction with Cramer’s V, which will be explained further below). It was determined that the six-cluster solution discussed in the findings that follow displayed the clearest differentiation among groups.

Variable	Category N=4317/100%of sample	Young Low Income Families 744/17.2%	Young Working Class 1363/31.5%	Mature Working Class 926/21.4%	Mature Low Income 732/16.9%	Hispanic Working Class 186/4.3%	Urban Professional 381/8.4%	X2	p.	Cramer's V
Spousal Employment	Yes	64.9%	71.0%	40.7%	36.9%	61.8%	79.1%	4.247	.000	.314
	No	35.1%	21.8%	59.3%	63.1%	38.2%	20.9%			
Employment	Yes	59.6%	64.9%	42.8%	32.2%	63.4%	73.3%	3.239	.000	.274
	No	40.4%	35.1%	57.2%	67.8%	36.6%	26.7%			
Marital Status	Now Married	82.9%	83.8%	84.7%	85.3%	81.7%	77.0%	36.942	.000	.065
	Never Married	7.6%	27.8%	8.0%	7.0%	11.8%	15.6%			
	Divorce, Widowed, Separated	9.6%	8.8%	7.3%	7.7%	6.5%	7.4%			
Ethnicity	White	86.9%	90.2%	95.2%	88.3%	0.0%	86.2%	4.376	.000	.503
	Black/African American	8.5%	8.5%	4.2%	8.1%	0.0%	10.6%			
	Asian or Pacific Islander	3.1%	0.6%	0.1%	1.5%	0.0%	2.6%			

	American Indian, Aleut Eskimo	1.5%	0.7%	0.4%	2.1%	0.5%	0.5%			
	Hispanic	0.0%	0.0%	0.0%	0.0%	99.5%	0.0%			
Household Size	One	0.0%	0.0%	9.4%	10.3%	4.3%	17.7%	3.499	.000	.403
	Two	4.5%	4.3%	85.8%	84.5%	21.5%	72.5%			
	Three to Five	84.1%	87.6%	4.8%	0.5%	62.9%	9.8%			
	More Than Five	11.5%	8.0%	0.0%	0.0%	11.3%	0.0%			
Market Size	Under 100,000 Population	21.2%	13.2%	15.1%	20.2%	7.0%	9.0%	2.284	.000	.230
	100,000 – 499,999	22.3%	14.2%	11.1%	23.3%	14.0%	15.1%			
	500,000 – 1,999,999	21.6%	34.4%	37.8%	18.9%	25.8%	22.2%			
	Over 2,000,000 Population	35.0%	38.2%	36.1%	37.6%	53.2%	53.7%			
Age	19-29	24.0%	16.5%	5.3%	4.9%	25.8%	13.2%	1.214	.000	.237
	30-39	36.2%	28.8%	7.0%	8.0%	28.0%	20.6%			
	40-49	21.6%	26.3%	14.7%	13.2%	15.6%	14.0%			
	50-59	12.8%	19.6%	27.1%	27.6%	21.5%	32.5%			
	60-69	4.5%	6.2%	22.3%	23.6%	4.8%	13.0%			
	70 Years and Older	0.9%	2.6%	23.5%	22.8%	4.3%	6.6%			
Household Income	Under \$20,000	23.2%	16.5%	29.4%	36.5%	23.1%	0.0%	1.350	.000	.250
	\$20,000 - \$39,999	36.3%	30.4%	35.3%	39.4%	30.6%	0.7%			
	\$40,000 - \$59,999	21.9%	25.6%	23.4%	17.3%	21.0%	5.0%			
	\$60,000 - \$79,999	9.3%	12.8%	8.5%	5.6%	14.5%	19.3%			
	\$80,000 – \$99,999	5.1%	7.4%	3.1%	1.1%	5.4%	23.3%			
	Over \$100,000	4.2%	3.7%	0.3%	0.1%	1.1%	51.7%			
Education Level	High School Diploma or Less	66.2%	59.1%	67.0%	67.7%	59.7%	29.6%	3.145	.000	.156
	College/University	15.2%	37.4%	29.1%	28.5%	37.1%	52.4%			
	Post Graduate Degree	12.7%	3.5%	3.9%	3.8%	3.2%	18.0%			
Home Ownership	Own	59.5%	71.4%	76.9%	74.8%	52.7%	83.6%	1.412	.000	.128
	Rent	37.5%	26.6%	21.1%	23.5%	40.9%	13.2%			
	Live with Relatives In Their Home	3.0%	2.0%	2.0%	1.7%	6.5%	8.8%			

Table 1. Cluster Analysis – U.S. Non-Traveler Segments.

The research was intended to mirror and extend McKercher's (2009) Hong Kong research. McKercher's set of demographic variables included income, education, and household size. Given the richness of the TAMS data, when performing the above discussed cluster analysis the additional variables of employment, marital status, spousal employment, ethnicity, size of community in which respondent resides, age, household income and home ownership were added to McKercher's more limited demographics. Gender was not included as TAMS respondents generally completed the instrument as part of a couple or family unit. The six clusters were then cross-tabulated with the demographic variables and reasons respondents had provided to explain their non-travel. Given the very large sample size, Cramer's V, rather than  $\chi^2$



tests were relied upon when considering differences among the clusters as Cramer's V adjusts for large sample sizes that tend to result in highly significant  $\chi^2$  values regardless of whether the relationship is particularly meaningful. The higher the resultant Cramer's V value, the stronger the relationship (please see Table 1).

#### **4. RESULTS**

A review of the six non-traveler clusters indicated quite distinct characteristics (please see Tables 2 and 3). Group one, which we have entitled 'Young Low Income Families,' represented 17% of the sample. This group tended to be younger and included a disproportionately high rate of unemployed respondents. Group one members were generally less educated and, as one would therefore presume, had a relatively low household income. Group two, members of the 'Young Working Class' (32% of sample) cluster, were similar to group one, however they were less likely to be married, and had higher levels of education and employment. On average, group two members, were slightly older than group one, and thus likely more established in their careers. While group two members tended to have slightly higher incomes than group one, they also had a higher level of home ownership and more often lived in urban centers – more expensive places in which to live, thus negating some of the earnings advantage they had over members of group one. When examining the reasons given for their non-travel, a significant number of members from both of these clusters cited economic factors as a reason for their non-travel. Group three, labeled 'Mature Working Class' (21% of the sample), tended to be comprised of those over 50 years of age. Members of the cluster generally live as a couple, also in urban centers, report a moderate level of income, predominantly from a sole-provider. Home ownership percentage, however, was high. Their most prevalent reason for non-travel related to the cost of travel.

Reason N=4317/100%of sample	Young Low Income Families 744/17.2%	Young Working Class 1363/31.5%	Mature Working Class 926/21.4%	Mature Low Income 732/16.9%	Hispanic Working Class 186/4.3%	Urban Professional 381/8.4%	X2	p.	Cramer's V
No Particular Reason	7.6%	7.9%	7.0%	7.5%	10.8%	10.6%	3.929	.000	.135
No Interest	3.4%	4.6%	9.9%	6.4%	3.8%	8.5%			
Too Expensive/ Would Rather Spend Money on Something Else	28.5%	27.1%	23.5%	23.9%	23.7%	18.8%			
Financial Reasons (Not enough money, Unemployed)	32.5%	29.5%	21.3%	23.9%	28.0%	14.0%			
Recently Made a Major Purchase	0.9%	2.8%	1.6%	0.8%	3.2%	4.0%			
Not Enough Time	5.5%	4.3%	3.5%	4.1%	2.7%	13.0%			
Young Children	2.6%	2.8%	0.3%	0.4%	3.2%	1.6%			
Sick/Infir/Disabled	1.9%	1.8%	8.7%	8.8%	2.7%	4.5%			
Other	3.6%	3.8%	8.5%	7.6%	4.2%	7.8%			
No Reason Given	13.5%	15.4%	15.7%	16.6%	17.7%	17.2%			

Table 2 . U.S. Non-Travelers – Primary Reason For Not Taking Trips.

Reason N=4317/100%of sample	Young Low Income Families 744/17.2%	Young Working Class 1363/31.5%	Mature Working Class 926/21.4%	Mature Low Income 732/16.9%	Hispanic Working Class 186/4.3%	Urban Professional 381/8.4%	X2	p.	Cramer's V
Too Expensive/ Would Rather Spend Money on Something Else	3.6%	6.2%	13.1%	8.6%	7.1%	7.3%	3.767	.000	.188
Financial Reasons (Not enough money, Unemployed)	37.6%	37.3%	30.5%	33.5%	36.9%	24.2%			
Recently Made a Major Purchase	9.7%	9.4%	5.3%	4.2%	11.9%	8.5%			
Not Enough Time	22.8%	18.1%	10.0%	8.9%	19.0%	22.4%			
No Out of Town Family/Friends	3.3%	3.6%	6.2%	3.6%	1.2%	4.2%			
Young Children	11.3%	11.3%	1.3%	1.7%	9.5%	3.0%			
Sick/Infir/Disabled	4.3%	4.2%	12.0%	17.2%	1.2%	7.3%			
Too Old to Travel	1.0%	0.3%	5.1%	6.9%	3.6%	1.2%			
Other	6.4%	9.6%	16.5%	15.4%	9.6%	21.9%			

Table 3. U.S. Non-Travelers – Secondary Reason For Not Taking Trips.

Group four, ‘Mature Low Income’ (17% of the sample) was similar to group three. However, members of this group had lower overall income levels and a higher rate of unemployment. When examining reasons provided for having not traveled during the previous two years, while economic factors were most often cited, prominent explanations for group four members also included a lack of interest and health issues.

Group five, 'Hispanic Working Class' (4% of the sample), while a small group, is interesting. This group demonstrated a high level of employment and a slightly above average level of income. It was also noted that members were more likely to be renting or living with relatives than were those of any other group. Members also tended to live in larger households. While financial considerations were most commonly cited as the reason for their non-travel, a large proportion of group five cited 'no particular reason/no interest,' and 'lack of time' as explanations for not having traveled during the previous two years. Finally, Group six, Urban Professional non-travelers (8% of the sample), was comprised of those most likely among non-travelers to have the resources required to facilitate travel. This group had a large percentage of high-income earners. Members tended to live as a couple and were predominantly of middle age. Interestingly, this group represented the largest African-American population across the segments. When examining reasons for their non-travel, a lack of financial resources, while still prevalent, dropped significantly as the primary rationale. A lack of interest in travel was however prominent, and as one would likely expect considering the group's descriptive title, more so than for any other cluster, a lack of time to travel was blamed as a reason to explain their non-travel behavior.

## **5. DISCUSSION**

A countless number of tourism studies have segmented travelers, pointing to the need to isolate and understand homogenous groups among heterogeneous populations in order to better target potential visitors, or repeat visitors. While these studies generally look at segments of travelers, given the current global economic climate and the flattening of tourism growth over the past several years, understanding why consumers are choosing *not to travel* deserves further study. This segment analysis of USA non-travelers has provided some interesting perspectives.

Segmentation has been described by Seaton and Bennett (1996) as the use of a sniper's rifle for precision targeting rather than shotgun marketing directed towards the entire population. The current findings suggest that a 'shotgun approach' to marketing

to non-travelers is likely not the best tactic. As is the case with travelers, the segmentation of non-travelers discussed above suggests that non-travelers are not homogeneous. They cluster comfortably into identifiable targetable segments, allowing for the implementation of strategies that can allow the industry to expand its reach beyond those currently being served, seeking that more elusive category of consumers – the category non-user. The discussion that continues suggests several approaches marketers might consider as they attempt to reach and motivate visit to their destinations, properties, etc. from some of these clustered groups of potential travel consumers.

It is important to note that analysis of the six divergent groups revealed that most do not identify a lack of interest in travel as a decisive motive for their staying home. In fact, few report a lack of ‘the travel bug’ (McKercher 2009). Regardless of demographics, most have a latent interest in travel. Some groups, however, do have economic or family issues that make travel, despite a desire to do so, difficult. Travel marketers should target these non-travelers with affordable products they will find attractive. For example, Mature Working Class cluster members point to family obligations as a reason they find travel difficult. Close-to-home, family oriented vacation options, with messages such as ‘Time to get off the couch!’ or ‘Grab your kids and go!’ may well entice these folks to embark upon at least a limited travel experience. Rather than emphasizing ‘value for money,’ innovative and inexpensive short-stay vacation options are likely to be most successful in enticing these potential consumers to partake in a travel opportunity.

The Hispanic Working Class and Urban Professionals non-travel clusters generally have the economic means to travel, and fewer than ten percent of members of each segment noted a lack of interest as a rationale for their non-travel; yet members failed to participate in vacation travel opportunities they could afford. The significant number of minority members that comprise these two clusters suggest that travel providers may not have been attuned to the minority traveler’s needs, desires, and/or travel parameters; suggesting the industry’s marketing to these potential travelers may have missed the mark. As the demography of the USA continues to shift toward a diversified ethnic mix,

there needs to be a greater understanding of how these different populations perceive travel. These findings suggest that the hospitality industry needs to do a better job of encouraging vacation travel from all ethnicities. With minorities expected to constitute a majority of the USA population by the year 2050 (CNN 2008), the importance is evident.

This non-travel study was conducted with a large nationally (USA) representative sample and a set of non-travel related questions that allowed a level of statistical analysis beyond that of previous studies. The resulting cluster analysis has affirmed that American non-travelers are heterogeneous, with identified shared characteristics within its segmented groups. Consideration of the various groups' non-travel explanations/motivations provides insight to tourism providers and marketers as they seek to convert these consumers from non-travelers to vacationers. Further study is clearly needed to provide additional explanation and to help us move beyond speculation as to the specific motivations necessary to alter this behavior. For example, as hypothesized by McKercher (2009), non-travelers may be citing a lack of resources as a socially acceptable justification for not having traveled; while such may not in fact be a root cause. Further study hopefully can unlock the latent travel desires and point to motivations that can alter the travel behaviors of the various clusters of potential travelers identified in this study. Knowing that ethnic background may be an important aspect of the discussion suggests that future research consider this variable.

The TAMS dataset, large enough to have lent itself to cluster analysis, identified statistically significant segments of non-travelers. Future large-scale studies based upon other populations are important. It may be that those populations will cluster in a similar manner to those that emerged in the current study, but more likely it will be found that the clusters that emerged from TAMS data are USA population specific, and that each locale will have its own unique clusters. Thus while this study's conceptual findings are likely generalizable, the specific clusters and their non-travel motivations likely are not. For instance, the variable related to ethnicity was not considered in the work of McKercher (2009), whose Hong Kong population was far more ethnically homogeneous. Including the variable herein resulted in the emergence of a very distinct and important segment.

Litvin, et al (2002), studied Singaporean travel patterns. Their work was based upon the assumption of Cooper et al's Leisure Paradox that the two necessary components necessary for travel are available time and discretionary funds. Looking at the flip-side, as noted above, Caldow (1997) found a lack of these as the primary reason for non-travel. The current research, however, suggests that while these two studies were likely correct in their findings, each pointing to these two factors as necessary ingredients for travel, the converse is not necessarily true. Thus, while a lack of 'time and money' may preclude travel, availability of these resources does not necessarily mean one will travel. Many other variables intervene, and it is these variables, generally ignored in the literature and likely overlooked by marketers, that can help unlock the non-travel segment. The richness of the current findings provide an opportunity to examine multiple segments of what in the past has most often been considered a single population, and point to the shortsightedness of such an assumption. What we discover from the current data is that most non-travelers can in fact afford to travel and most also have a latent interest to travel. But something seems to get in the way as they make their purchase decisions. These consumers spend their discretionary money somewhere, but as noted 21% of the USA population, per the latest TAMS study, opted not to do so for travel. Perhaps other industries have been quicker to develop and suitably promote products that motive these consumers; thus capturing spending that could otherwise have been directed toward the purchase of a travel experience. McKercher (2009) commented on this theme, having criticized the Hong Kong travel industry for not providing non-travelers a good reason to do so; suggesting that other industries had done a better job of earning the 'hearts and minds' of these consumers.

Analysis of the cluster analysis herein noted that most non-traveler groups seem to have travel as a lower priority category versus other product types. If one has \$3,000 to spend, a consumer can select, or not select, a travel product versus a flat screen television set, a new computer system or a health club membership. For the golf fan, for example, the travel industry needs to make sure that the potential consumer sees the value of the time and energy required to travel to Augusta National versus tuning in the Masters at home on a high definition television set. It is up to travel marketers to

understand the nature of this macro-competition. Travel marketers must entice non-consumers to spend their leisure dollars on appropriate and well-targeted travel experiences. For, given today's heightened security concerns, high levels of tourism related taxes and rising costs, it seems a reasonable concern that a failure to do a more effective job of targeted marketing to segments of non-users may result in increasing rates of non-travel; not an attractive alternative.

## **6. CONCLUSION**

We encourage tourism market researchers elsewhere to incorporate the research techniques utilized in this study as a means of better understanding their own markets. Non-travel is not a uniquely USA issue. As noted, studies elsewhere have similarly found large population segments not to travel. Marketers must understand that while people rarely buy without having a want, people often want but do not buy (O'Shaughnessy, 1987). This research identified USA non-travel groups and provided some insight into their reasons for not having chosen to travel. In today's difficult economy, the conversion of non-travelers can add an important new source of needed revenue. With the right products and well-crafted marketing messages, travel marketers can do a better job of enticing the non-travelers among us to add travel to their lives, substantially enhancing opportunities for the success of the industry.

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Article info: Received 15/07/11. Accepted 24/10/11. Refereed anonymously.