

Certified Travel Associate (CTA) Program

Professional Skills Course

*Understanding
Customer Needs
Activities Workbook*

Lesson 1: Why Do People Travel and What Do They Need?

At Work

Indicate whether the following clients are planning discretionary or nondiscretionary travel, then describe how your sales approach would differ for each.



A woman traveling to represent her company at a trade show

Discretionary Nondiscretionary

Your Sales Approach? _____

A woman taking a summer vacation with her husband and children

Discretionary Nondiscretionary

Your Sales Approach? _____



Quick Quiz

Match each customer with the type of travel he or she best represents. (Answers may be used more than once).

- a. business travel
 - b. familiarization travel
 - c. meeting and incentive travel
 - d. affinity group travel
1. ___ Doctor attending an international medical conference
 2. ___ Salesperson attending a mandatory training session
 3. ___ Salesperson taking Caribbean vacation with family as reward for outstanding performance
 4. ___ Mother taking children to visit grandparents
 5. ___ Travel consultant visiting destination to earn specialist designation
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Lesson 2: Understanding Buying Behavior

About You

To further your understanding of psychocentric and allocentric personality types, let's examine your own travel motivators and vacation preferences. Take the following quiz by reading each question and circling the letter of the answer that best applies to you. (Hopefully, you'll discover a little about the type of traveler you are—and where you might be happiest on your next vacation.) When you have finished, follow the scoring directions and read about what your score means. Be honest. No one will see your answers.



1. In your daily activities, you usually:
 - a. Try to avoid rushing so you can relax a bit.
 - b. Find that you are sometimes slow and sometimes fast.
 - c. Hurry even when you don't have to hurry.

2. Looking in your medicine cabinet, you're likely to find:
 - a. Virtually all nationally known, name-brand pain relievers and other remedies.
 - b. A mix of name-brand and generic over-the-counter drugs.
 - c. Mostly generic or house-brand pain relievers and drugs.

3. When a new electronic gadget or product hits the market, you:
 - a. Wait until it has been around for quite some time and drops in price before you buy it.
 - b. Wait for a short while before you buy, just to be sure they've "worked out all the bugs."
 - c. Pay a higher price to be among the first to own one and to enjoy the feeling of discovery.

4. When you're far away from home, you're likely to eat at:
 - a. Familiar restaurants that are part of a national chain.
 - b. A mix of well-known national chains and local, little-known restaurants.
 - c. Small, off-the-beaten-path places that feature regional specialties you can't find elsewhere.

5. As you work on things around your home, you like to do them:
 - a. Slowly and deliberately to be accurate and thorough.
 - b. At a moderate pace.
 - c. Quickly, to get them over and done with.

6. When you visit a spot with steep cliffs or canyons, you like to:
 - a. Stay far away from the edge.
 - b. Get close enough to look over, even though you feel uncomfortable.
 - c. Get up close to the edge so you can get the best view.

7. On average, you read:
 - a. Very few books.
 - b. About one or two books a month.
 - c. About three or four books a month, or more.

8. On a short vacation, you'd rather:
 - a. Drive to your destination.
 - b. Fly, but stay in one place to relax when you get there.
 - c. Fly, rent a car, and explore.

9. You regard the health-and-exercise craze sweeping the nation as:
 - a. Not very worthwhile, so you don't participate.
 - b. Helpful, but you don't exercise as much as experts say you should.
 - c. Important, so you exercise regularly to stay in great shape.

10. When you make a decision, you:
 - a. Think and worry about it a lot.
 - b. Make the decision quickly, but worry later if you've made the right one.
 - c. Make the decision quickly and easily, seldom worrying later whether it was correct.

11. Compared with most people, you:
 - a. Have a wide circle of friends whom you see often.
 - b. Enjoy family and friends, but sometimes feel the need to get away from them.
 - c. Have a small, close circle of friends whom you see occasionally.

12. Yesterday, you watched TV for:
 - a. More than two hours.
 - b. About two hours.
 - c. Less than two hours.

13. Compared with most people you know, you:
 - a. Are bothered by the many pressures of daily life.
 - b. Handle most problems well, but sometimes feel strong anxiety.
 - c. Deal well with pressure without feeling much anxiety.

14. When you travel internationally, you:
 - a. Hope that most of the locals speak English.
 - b. Rely on a phrasebook or guide to get by.
 - c. Learn the language or as many foreign phrases as possible so you can talk with locals.

15. Compared with most people, you think your energy level is:
 - a. Perhaps a bit lower.
 - b. About the same.
 - c. Much higher.

Scoring: Count the number of "a"s, "b"s, and "c"s you circled, and then score yourself as follows:

"a"s x 5 = _____ points

"c"s x 1 = _____ points

"b"s x 3 = _____ points

_____ Total points

What Your Score Means

75-65 points: You're the type of traveler Plog characterizes as "psychocentric." You value security and stability in your everyday life and on your vacations. "Psychocentrics are the flywheel of society—they keep it from going out of kilter," says Plog. "They like well-established, brand-name products, and they prefer familiar, family-oriented travel destinations." You probably prefer to drive to a favorite vacation spot, stay in one place to relax while you're there, and eat at familiar restaurants. You may well own or rent an RV for vacations. For international travel, look for escorted group tours and cruises with structured activities. You'll enjoy destinations such as Atlantic City, Florida beaches (especially Miami Beach), Nevada gambling resorts, Oahu, and Disney World and other theme parks.

64-45 points: You're a "midcentric" traveler with psychocentric leanings. You value variety in your travels, but still look for security, relaxation, and home-style comforts on vacation. You'd enjoy a cruise or a group tour that allows you a little unstructured time for yourself. If your score was at the high end of the 64-45 point range, you're attracted to U.S. national parks, big U.S. cities (Washington, D.C. and New York City, for instance), Hawaii's outer islands, and Caribbean resorts. If you scored lower in this range, you'll have a great time in English-speaking Canada, the Caribbean, Central Europe and Great Britain, Brazil, and Mexican resorts.

44-25 points: You're an energetic, adventurous midcentric traveler. Crowded, traditionally "touristy" destinations aren't for you. You reach out for new experiences—provided they're not too threatening. When you drive, you enjoy taking spontaneous detours along U.S. backroads—led there, perhaps, by reading about little-known local attractions in an AAA TourBook guide or other source. On a group tour, you don't mind having the basics (transportation and hotels) arranged for you—as long as you have plenty of time to follow your own interests. If you scored high in the 44-25 point range, you're attracted to Southern Europe and the Mediterranean islands, Israel, Quebec, Japan, Scandinavia, and Australia. The lower your score, the more you're attracted to exotic spots: Egypt, Russia and other former Eastern Bloc countries, or China.

24-15 points: You're among the most adventurous "allocentric" travelers, who comprise less than 4 percent of the population by Plog's reckoning. "Allocentrics are always on the creative, cutting edge," he says. "They're always looking for what's new." Intellectually voracious, you value spontaneity and a sense of discovery above all else. You shun theme parks, group tours, and cruises, preferring to fly to international spots as yet undiscovered by mainstream tourists. You want to blaze your own trail, experiencing unfamiliar cultures firsthand, staying in small local hotels, and eating local dishes. Underdeveloped foreign lands largely unexplored by outsiders are for you; you don't mind the lack of conventional accommodations and amenities. Antarctica, Nepal, Tibet, Thailand, and Africa call to you.

From: "Size Up Your Vacation Style" by Joseph D. Younger, *AAA World*, January/February 1994. Reprinted by permission.

Lesson 3: Using Buyer Psychology to Sell Travel



Time Out

Think of some other “W” questions that can help you use buyer psychology to sell travel, and write them in the spaces provided below.

Who? _____

When? _____

Where? _____

Why? _____

What? _____

Application Activities

The following exercises will help you put into practice what you have learned about buyer psychology so far. If you have any trouble completing the exercises, refer to the supplemental article for this course, “Why People Travel and Why They Don’t: The Concept of Allocentrism and Psychocentrism”, by Stanley C. Plog, located in the back of this booklet.

Part 1: Matching Types of Travelers and Destinations

Complete the following list of characteristics that apply to four of the traveler types described by Plog. Write down as many characteristics as you can think of. Then think about the destinations you might recommend to each of the travelers profiled and write them in the space provided. Remember that a particular destination may be appropriate for more than one type of traveler; in fact, a single destination could be appropriate for all of them. Identify as many destinations as possible.

Traveler Types and Destinations

High-Energy Allocentrics (HEA)

Characteristics:

Prefer non-touristy areas

Exploring/searching

High-Energy Psychocentrics (HEP)

Characteristics:

Prefer familiar atmosphere

Enjoy crowds

Destinations:

Destinations:

Low-Energy Allocentrics (LEA)

Low-Energy Psychocentrics (LEP)

Characteristics:

Characteristics:

Travel at more leisurely pace than HEA

Have few outside interests

More intellectual travel than HEA

Territory bound

Destinations:

Destinations:

Part 2: Analyzing Customer Profiles and Recommending Destinations

Read the following customer profiles. Identify what type of traveler you think each profile describes, and recommend two destinations for each customer. Be sure to explain why you chose each customer classification and how your recommended destination fits that profile.

Customer Profile—Single Traveler

Sex:	Female
Age:	29
Residence:	East Lansing, Michigan
Preferred travel mode:	Air
Length of vacation:	2 weeks
Planning to spend:	\$2,000
Travel month:	February
Frequency of travel:	As often as she can
Last vacation:	Honolulu
Most enjoyable trip:	Wildlife photo trip in Africa
Least enjoyable trip:	Last year's family reunion at a rustic lake resort in the upper Midwest
Other trips:	Disney World, camping in Yellowstone, Club Med in Cancun

1. Type of Traveler (circle type)

Low-energy allocentric

Low-energy psychocentric

High-energy allocentric

High-energy psychocentric

2. Why did you choose this classification?

3. What two destinations would you recommend to her?

4. Why would you recommend these destinations?

Customer Profile—Family Travelers

Family members:	Wife, husband, two sons, one daughter
Age:	Wife: 37; Husband: 40; 14-year-old boy, 12-year-old girl, 8-year-old boy
Residence:	Atlanta, Georgia.
Preferred travel mode:	Open
Length of vacation:	1 week.
Planning to spend:	\$8,000
Travel month:	March/April
Frequency of travel:	An annual summer vacation; occasional long weekends
Last year's summer vacation:	Orlando
Most enjoyable vacation:	Wife and husband: Graceland Mansion, Memphis, Tennessee 14-year-old boy: None. Hasn't liked any. 12-year-old girl: Orlando 8-year-old boy: Orlando, and wants to go again
Least enjoyable trip:	Wife: Camping trip in the Smoky Mountains Husband: Orlando in the summer Kids: Graceland
Other trips:	Drove to Grand Canyon in the minivan Las Vegas without the kids Niagara Falls Washington, D.C., to visit the Smithsonian Mackinaw Island, Michigan

1. Type of Traveler (circle type)

Wife	Husband	Kids
Low-energy allocentric	Low-energy allocentric	Low-energy allocentric
High-energy allocentric	High-energy allocentric	High-energy allocentric
Low-energy psychocentric	Low-energy psychocentric	Low-energy psychocentric
High-energy psychocentric	High-energy psychocentric	High-energy psychocentric

2. Why did you choose these classifications?

3. What two destinations would you recommend to them?

4. Why would you recommend these destinations?

Part 3: Practice Presenting Travel Products Using Buyer Psychology

Assume that you will talk with the following six customers, either on the telephone or in your office at work tomorrow. Read each customer situation and write down 2–3 questions you will ask the customer to bring his or her unique needs to the surface. Make up answers to those questions for your customer, then choose a destination or specific travel product you would recommend based on those answers. Finally, write a brief description of how you might present your recommendation to the customer, focusing on the benefits of the destination, not the features. Remember to tie in how that destination will meet the needs of the customer.

Customer A

Ralph Porter represents a condominium association and needs help planning a cruise for a group of senior citizens. Many in the group are experienced travelers, but over half are first-time cruisers. He needs your help planning a trip that will meet the needs of everyone.

What questions will you ask? How does this customer respond?

1. _____

2. _____

3. _____

Your recommendation:

How will you present your recommendation to this customer?

Customer B

The local Mary Kay Cosmetics representative, who is a friend of yours, has decided to set up a sales contest for her 50 part-time sales representatives. She wants to use travel as an incentive to increase sales.

What questions will you ask? How does this customer respond?

1. _____

2. _____

3. _____

Your recommendation:

How will you present your recommendation to this customer?

Customer C

An accountant for whom you have been handling a small amount of business travel calls to discuss his upcoming vacation. He and his family have heard a lot about the Cayman Islands from their friends and are thinking of going there or to Bermuda sometime in the spring.

1. _____

2. _____

3. _____

Your recommendation:

How will you present your recommendation to this customer?

Customer D

John and Jenny Flynn, both public school teachers, are considering taking a cruise during the February school vacation. This will be their first vacation without the children and, now that Phil and Paula are on their own, they can afford to be a little more extravagant than in the past.

1. _____

2. _____

3. _____

Your recommendation:

How will you present your recommendation to this customer?

Customer E

An executive of a Fortune 500 company has just come back from the company's semi-annual Board of Trustees meeting. The stress involved in preparing for the meeting has her on edge. She needs a change of scenery, if only for a long weekend.

1. _____

2. _____

3. _____

Your recommendation:

How will you present your recommendation to this customer?

Customer F

Bob's sister has been clamoring for him to visit ever since her twins were born. He has postponed the visit because he is not fond of the heat in Florida. Lately, however, he has been hearing a lot about Disney World, Epcot, and Universal Studios and thinks he might like to see them for himself. He needs your help figuring an inexpensive way to combine visiting his sister in Tampa and having some fun, too.

1. _____

2. _____

3. _____

Your recommendation:

How will you present your recommendation to this customer?

Part 4: Using Buyer Psychology to Sell Travel

Answer the following questions to help you think about how you can use buyer psychology to sell travel to your customers.

1. Over the past few weeks, what types of travelers did you see/speak with most often?

2. What destinations did you sell those travelers? Why?

3. What other types of travelers might also be interested in the destinations you listed in #2?

4. What recent sales opportunities were lost that might have been salvaged with your current knowledge of buyer psychology?
