

Getting to Next



BY DENNIS MARZELLA

For 15 years, The Y Partnership National Travel Monitor series has helped the industry stay ahead of trends through our insights and interpretation of the forces shaping consumers' lifestyles and the associated attitudes, intentions and preference for leisure and business travel.

Consumers Have Been Busy

Since 2000, consumers have grappled with everything from terrorism to tumbling tech stocks. From Enron's implosion to eBay's explosion. From tsunamis to hurricanes to energy prices gone wild.

They've voted in two presidential elections and for five American Idols (in the middle of the sixth). They've picked up books recommended by Oprah, listened to music promoted by Apple, and have followed diets espoused by a "fat actress," a doctor named Atkins, and one from South Beach. They've gone on a wild ride in real estate and have given birth to a new generation of decorators, amateur appraisers, and property flippers. They've said goodbye to Anna Nicole. They've traded up to feed their Affluent Attitude*, while at the same time, they've developed an obsession with exceptional values.

Yet despite these widely divergent developments, and perhaps even because of them, there's a different kind of energy in the air. An enterprising spirit and mindset. A sense of movement, growth and even accomplishment. No matter how far and wide consumers continue to be pulled, and regardless of age, they are determined to keep moving along. They're in go-mode and determined to get to "Next." Will you be there to greet them?

What's Next?

Relate to more: Something familiar and comfortable vs. something new and exciting.

New and Exciting

	2002 %	TODAY %
Total	41	56
Echoes	59	72
Xers	49	64
Boomers	36	52
Matures	28	36

Source: YPB&R/Yankelovich Partners 2007 National Leisure Travel Monitor

Generation	Birth Years	Ages in 2006	Size in Millions (U.S. Census, June 2004)
Echo Boomers	1979-1990	16-27	42M
Xers	1965-1978	28-41	57M
Boomers	1946-1964	42-60	78M
Matures	1945 and before	61+	52M

Source: YPB&R/Yankelovich Partners 2007 National Leisure Travel Monitor

Progress in Plain View

Everyday, consumers have been bombarded with an entirely new menu of goods to buy, drink, plug in and rev up. Walk into a library, a coffee bar, a big box store or mall, even the local gym. There are new skill sets everywhere. People know what to do with iPods and cells, Webs and blogs. They know how to recognize good design and how to tell the difference between good and bad cholesterol. They know how to reinvent the wheel — and reinvent it again. Not to mention their facility with an entirely new language — rife with terms ranging from broadband to venti latte — to go with their wares.

Consumers have been reaching forward and making headway across the countless learning curves that life — and the marketplace — have put in their path. Learning curves that involve buying organics, typing with two thumbs, understanding hybrid vehicles and so much more. Learning curves that was virtually nonexistent just several years back.

Some real hard-core schooling has been in session. And while many people have completed their tasks and passages, and have done so successfully, others are still finding and making their way. Here's a partial progress report:

Rate skills highly:

Handling whatever life throws your way	74%
Being able to process new information quickly	73%
Knowing how to get what you need when dealing with customer service	71%
Being able to evaluate the trustworthiness of information	69%
Being able to say "no" when you need to	68%

(Top 3 box on 7 pt. scale where 7 is rate skills as "excellent" and 1 is rate skills as "poor")

Source: YPB&R/Yankelovich Partners 2007 National Leisure Travel Monitor

Regardless of where they've come from, where they currently stand, or what life throws their way, consumers continue to move forward. In this vein, it's interesting to consider the prevailing view of what lies in store.

Likely to be true in the world 10 years from now:

The U.S. will still be fighting the war on terrorism	75%
Identity recognition technology (e.g., eye scans, DNA) in everyday life	71%
Social Security will be bankrupt	55%
Many more people will live past 100	55%
Almost all movies, video games and music will be downloaded rather than being on a disk	55%

There will be no place in the U.S. without free wireless access 48%

Same sex marriage will be accepted in most states 46%

There will be a postage charge on emails 42%

(Top 3 box on 7 pt. scale where 7 is "extremely likely" and 1 is "not likely at all")

Source: YPB&R/Yankelovich Partners 2007 National Leisure Travel Monitor

Getting It Down, Getting It Right

Now, more so than ever before, when it comes to consumers' ability to create the lifestyles and the marketplace experiences that suit them — they're getting it, they're embracing it. They can think faster and work less to find and enjoy what they want.

Self-Invention, Personal Authenticity, and Advantage: Intangibles are Fully Engaged

Three critical values constructs initially identified in the YPB&R/Yankelovich, Inc. 2006 National Leisure Travel Monitor™ epitomize the way consumers now live their lives, the way they expect to live their lives, and how they hope to realize the promise of new benefits and expectations.

SELF-INVENTION: Determined to write their own lifestyle and marketplace scripts, consumers fully expect to participate in the creation of relevant options and meaning. They're not satisfied with simply looking for meaning in what's made available to them. Accordingly, the travel industry must make new inroads to personalizing and customizing travel experiences to feed the hunger for self-invention.

PERSONAL AUTHENTICITY: Consumers are digging deep inside and figuring out what makes sense for them. They're approaching choices with honesty — even if it means venturing into new territory — and feeling empowered enough to put a stake in the ground and say Here I Am. This means consumers have a handle on their priorities. They will sort out and pursue things they want to do whether it is take more family vacations to reconnect with their children,

an adventure travel trip or a romantic escape weekend with their spouse or significant other.

ADVANTAGE: INTANGIBLES: Recognizing the value in what money can buy, and what it can't buy. Consumers are searching for satisfactions beyond material accumulation.

As they explore and strive for the next level of lifestyle and marketplace benefits including travel, consumers are leveraging their power and strengths. Imaginative travel marketers can play into the aforementioned values by creating "experiences" that will give more meaning to travelers' lives. One opportunity is looking at new ways to allow consumers to "reinvent" themselves while they're out of their usual routines. This suggests a rising need to develop or enhance the product development function. At a minimum, marketers should simply think more creatively. As the data below reveal, it is important to facilitate the discovery, not dictate it. Communicate the offerings honestly, exaggeration and hype are not welcome.

They trust their instincts; they know what they want and how to get it.

AGREE MORE WITH "LISTENING TO EXPERTS" OR "FOLLOWING YOUR OWN INSTINCTS"

Following own instincts

2002 62%
TODAY 76%

(Top 2 box on a 4 pt. scale where 4 is "extremely important")

I ALWAYS KNOW HOW TO GET THE INFORMATION I NEED TO MAKE DECISIONS

2002 61%
TODAY 76%

(Top 2 box on a 4 pt. scale where 4 is "extremely important")

They have the confidence and the passion to explore and to commit.

IMPORTANT THAT OTHERS SEE YOU AS SOMEONE WHO IS PASSIONATE ABOUT THE THINGS YOU CARE ABOUT

2002 61%
TODAY 74%

(Top 2 box on a 4 pt. scale where 4 is "extremely important")

They're increasingly nixing hype in favor of the real deal.

IMPORTANT THAT OTHERS SEE YOU AS SOMEONE WHO CAN ALWAYS SEE THROUGH EXAGGERATION AND HYPE

2002 38%
TODAY 58%

(Top 2 box on a 4 pt. scale where 4 is "extremely important")

Consumers have put marketers on notice. They have stolen the say-so, the power to prevail. Many marketers have had to work harder to respond to consumer empowerment, not to mention widespread marketing resistance. This situation suggests the importance of creating charismatic brands that consumers will seek out. Think of your Website as a proscenium to present your show. Long-form "stories" that reflect branded content could tap into consumers' desire for greater value from marketing itself. These "movies" may reside on your Web site giving consumers an opportunity to sell themselves. In the world of iPods, consumers may very well want to download these videos and develop possible "vacation playlists"

THE AMOUNT OF ADVERTISING AND MARKETING TODAY IS OUT OF CONTROL

2005 46%
TODAY 52%

(Top 2 box on 7 pt. scale where 7 is "agree completely")

To be successful in the evolving environment, travel marketers must make marketing itself part of a charismatic brand experience that is honest and appealing.

About Dennis Marzella, Marzella was EVP Brand Strategy & Research at Y Partnership for 19 years. He recently left Y Partnership and joined Quantified Marketing, based in Heathrow, FL as VP, Brand Strategy & Research. Quantified Marketing is a company that works with restaurants within the hospitality industry on marketing strategies.