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EURO RSCG WORLDWIDE | VOL 7

the future of travel

The New Vocabulary of Travel and Tourism



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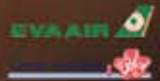
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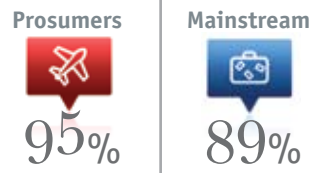
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“If I could afford the time and money,
I would travel much more often”

→ INTRODUCTION

The travel and tourism category is evolving in response to broad social and cultural shifts, including the downsizing brought on by the global recession, the continued movement toward more-mindful consumption, and the move away from individualism in favor of community-mindedness. Each of these trends is reflected in the new lexicon of travel terms, which includes such neologisms as *flashpacking*, *geotourism*, *Rough Luxe*, *slow travel*, *staycation*, and *voluntourism*.

A rapidly proliferating vocabulary typically signals ferment and change, and what we're seeing now is no exception. While some of these terms may sound faddish, they are, in fact, manifestations of robust and mutually reinforcing trends that promise to have staying power. To some extent, the scaling back we're seeing in the category (e.g., staycations, reduced business travel) represents an involuntary reaction to current economic pressures, but certain other emergent behaviors indicate a shift in values that is both a positive and a deliberate response—the upside to the downturn, so to speak. New research from Strategic Business Insights (formerly SRI Consulting), creator of the VALS (“Values, Attitudes, and Lifestyles”) framework and methodology for tracking consumer values,

shows that communitarian values are beginning to trump individualism. Thus, concepts that embrace sharing, community, and collaboration are experiencing a revival—and influencing the choices travelers make.

In this issue of *KNOW*, Euro RSCG Worldwide examines the new vocabulary of travel and tourism (T&T) and its implications for marketers. The report draws on findings from an online survey fielded by Market Probe International earlier this year among 2,357 adults in three markets: the United States, France, and the United Kingdom. Prosumer breakouts are included throughout the report as an indicator of where the sector will be heading next.

FLASHPACKING: Backpacking with flash or style; travel that combines modest accommodation with free spending on activities and other indulgences; budget backpacking that incorporates high-end technology.

GEOTOURISM: Tourism that sustains or enhances the character of a place—its environment, heritage, aesthetics, culture—and the well-being of its residents.

ROUGH LUXE: Luxury experiences that incorporate time for reflection and personal encounters with people, nature, and architecture, as well as food and social and cultural experiences linked to geographic locations.

SLOW TRAVEL: Travel that provides an opportunity to become part of local life and to connect to a place, its people, and its culture.

STAYCATION: A vacation spent at home or nearby.

VOLUNTOURISM: Voluntary service experiences that include travel to a destination in order to realize one's service intentions; the conscious, seamlessly integrated combination of voluntary service to a destination with the traditional elements of travel and tourism (arts, culture, geography, history, and recreation).

Sources: Wikipedia.org, NationalGeographic.com, RoughLuxe.com, SlowMovement.com, Merriam-Webster.com, Voluntourism.org



44% of global respondents start planning vacations four to six months in advance



Conflicts Blended and Transcended: Prosumers Provide a Glimpse of the Future

Fairly predictable category conflicts underpin travel and tourism, familiar to just about anyone who has planned a vacation:

Exotic and New	vs.	Familiar
Luxury/Comfort	vs.	Responsible Consumption/Simplicity
Getting Away from It All	vs.	Staying Totally Connected
Fun and Indulgence	vs.	Knowledge and Growth
Relaxation	vs.	Adventure
Individual Gratification	vs.	Communalism
High Tech	vs.	High Touch

As the new vocabulary of travel and tourism suggests, today's most forward-thinking consumers—*prosumers*—are finding creative ways to blend and transcend these dichotomies, combining indulgence and altruism, relaxation and adventure, luxury and simplicity. By examining those areas in which prosumers are well ahead of the mainstream,

we are able to identify four major groupings of trends that are shaping the competitive landscape and that offer significant opportunity for businesses in the T&T space. To lead in the category going forward, brands will need to excel at these four things:

1. Accepting and embracing “green” as a way to do business;
2. Offering experiences that provide personal growth, education, and/or a sense of community/interconnectedness;
3. Staying in sync with customers' new media usage; and
4. Embracing emerging models of luxury and customer service.

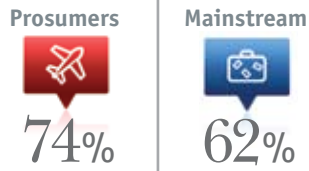
While we are focused here on individual trends, it is important to keep in mind that, to a strong degree, these trends are overlapping, cross-cutting, and mutually reinforcing—another key indicator, along with the burgeoning vocabulary, of an inflection point or paradigm shift.

What Is a Prosumer?

Prosumers are the most influential men and women within any market. Empowered by new technologies and improved access to information, they have tipped the scales of power away from manufacturers and retailers, and toward themselves. They are highly knowledgeable and demanding consumers who expect their brand partners to acknowledge their value and treat them accordingly. Prosumers typically make up 15 to 20 percent of any market. Euro RSCG Worldwide has made them an ongoing focus, because, beyond their own economic impact, prosumers influence the brand choices of others. Simply put, what prosumers are doing today, mainstream consumers are likely to be doing six to 18 months from now.

KEY PROSUMER TRAITS

- >> Embrace innovation—curious to try new things, challenges, and experiences
- >> Keen on new technology and gadgets
- >> Transport new attitudes, ideas, and behavior—they are “human media”
- >> Pursue timeless value
- >> Recognize their value as consumers and expect brand partners to do likewise
- >> Are marketing-savvy and plugged in to multiple media sources
- >> Demand top-notch customer service and access to information
- >> Seek to maximize control over their lives through information, communication, and technology
- >> Constantly seek information and opinions; eager to share their views and experiences with others



“Making environmentally friendly choices makes me feel good”

How Green Was My Travel

Whereas not so long ago the issue of “going green” was one of exhortation and persuasion, now it is more a matter of shade, degree, and implementation. Most all constituencies in the T&T sector—consumers, providers of lodging and transport, tourism authorities and operators—would agree in the abstract on the good of green, but are still challenged by how best to integrate green goals in terms of acceptable compromises related to comfort, ease, and the bottom line.

Varying Shades of Green

The most successful green practices are bottom up, well integrated, and transparent, with buy-in from all stakeholders. It’s a far cry from the early days of eco-consciousness, when hotels were able to earn green cred simply by placing small cards in rooms alerting guests that, in the interest of sustainability, sheets would not be laundered each day unless requested. Now that leading companies from Wal-Mart to GE have shown that sustainability bolsters the bottom line, more travel and hospitality brands have made a commitment to go green all over. In one example of where the industry appears to be headed, every room at Seattle’s Best Western Executive Inn and Best Western Loyal Inn is an “EcoRoom,” meaning it features products that are energy and water efficient, waste reducing, nontoxic, and/or biodegradable. Reservation agents have been trained to discuss the hotels’ green program with prospective guests. Other T&T brands are approaching “green” from a more personal perspective: New York’s Premier Hotel uses special purification products and techniques to ensure each of its “Premier Pure” rooms is at least 98 percent free of bacteria and viruses. Marriott and Hilton are among the large chains entering the “hypoallergenic accommodations” space.

Hyatt Hotels Corporation has devised a bottom-up way to ensure each hotel property has a sustainability strategy uniquely suited to its circumstances. Every hotel and resort has its own Green Team, composed of employees from every department and responsible for training all personnel within that location. This approach ensures sufficient flexibility and empowerment to develop sustainability practices adapted to the local environment. In Santiago, Chile, for instance, the Green Team transcended the lack of a public recycling infrastructure by partnering with a local charity; the charity places recycling bins throughout the hotel property, picks them up, and is

able to keep any proceeds earned from selling the usable contents.

Brigitta Witt, vice president for environmental affairs at Hyatt, notes that the company’s sustainability practices were spurred by a desire to make a positive difference while also reducing operating costs. Now, she says, stakeholder concerns are also a driver: “Our customers—individual travelers and large corporate clients—want to know more about what we are doing. Do we have a CSR statement? What is our recycling policy? The public expects us to communicate what we’re doing and why.”

Stakeholder engagement is a vital component of green efforts. Rewarding green consumers—for instance, with special parking places for hybrid vehicles—is one engagement strategy. Among myriad others:

- The Plaza Hotel offers diners a 100-Mile Menu, featuring seasonal fare made exclusively from ingredients produced within 100 miles of New York City. Mealtimes become an opportunity to learn and explore.
- As part of its “Survivor” promotion, the luxurious Rancho Bernardino Inn in San Diego challenged guests to reduce their room rates by cutting back on amenities, ranging from doing without the honor bar to having no A/C or heat, no lights, and, at the most extreme, no bed! Visitors who chose the bare-bones package paid just \$19 for the night’s stay, down from the usual \$219.
- Canada’s AIR MILES My Planet loyalty program lets customers earn reward miles by buying environmentally responsible products; miles can then be redeemed for such eco-friendly rewards as a garden composter, a local bus pass, or a donation to the World Wildlife Fund.



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Eco-Geo-Sustaino-Tourism

Bundled within these clunky sustainable-tourism rubrics are a variety of philosophies and practices related to greener and generally more mindful travel. The term *ecotourism* has been around for at least two decades, generally referring to tourism that combines nature-focused sightseeing with sustainably managed accommodations. More recently, the term has been expanded to incorporate a focus on indigenous populations and the needs of local communities. The International Ecotourism Society promotes tourism centered on these principles:

- Minimizes impact
- Builds environmental and cultural awareness and respect
- Provides positive experiences for both visitors and hosts
- Provides direct financial benefits for conservation
- Provides financial benefits and empowerment for local people
- Raises sensitivity to host countries' political, social, and environmental climates

On the consumer side is a real eagerness and appreciation for these kinds of options, as various research studies show. *The GreenMoney Journal's* spring 2009 edition indicates more than three-fifths of U.S. adults believe their travel experience is better when the destination preserves its unique natural, cultural, and historic sites. Those consumers most committed to sustainable (a.k.a. responsible) tourism are those who fall into the LOHAS (Lifestyles of Health and Sustainability) segmentation. In the U.S., approximately 19 percent of adults, or 41 million people, are currently considered LOHAS consumers. Relatively upscale and well educated, they are an attractive target given their tendency to be influencers who are less price sensitive and more brand loyal.

The Emerging Emerald Standard

For those seeking to practice sustainable tourism in good faith, a problem has been a lack of consistent, universally accepted, and verifiable standards. In their absence, it can be difficult for consumers to evaluate and choose wisely from among a variety of so-called green options and for T&T companies to ensure their claims are credible. As former Soviet leader Mikhail Gorbachev said of nuclear disarmament: "Trust but verify." Several respected organizations are taking steps to resolve this dilemma.

The Partnership for Global Sustainable Tourism Criteria (GSTC), a coalition of 25 organizations, including several U.N. affiliates, has been developing best practices and certification programs that promise to be the first globally relevant criteria. Sustainable Travel International (STI) has introduced the Sustainable Tourism Eco-Certification Program (STEP), which is aligned with the minimum baseline GSTC. A subprogram, The Luxury Eco Certification Program, is tailored to the needs and challenges of luxury operations, and demonstrates how one standard category conflict—green and luxury—can be transcended. A key component of STEP is encouraging the use of carbon offsets to allow travelers and travel providers to reduce the impact of greenhouse gas emissions.

Such certification efforts parallel how the term *organic*, once loosely and confusingly applied, is now governed by more precise standards. Just as we now have "100 percent organic," "organic" (95 percent certified), and "made with organic ingredients" (70 percent), so we might also look forward to green-tourism calibrations.

Implications

Today, every brand must operate in the sustainability space and be subject to increasing scrutiny. Some, by virtue of their socially responsible positioning, will need to operate on an even greener plane.

Among the issues to consider:

- As consumers evolve from conveniently green to green as a way of life, T&T companies must be continuously proactive, rather than reactive. For those playing catch-up, the best strategy is to implement practices quietly and quickly; an announcement only begs the question: Why not earlier? This is not the arena for PR, but for seamless integration of green policies. Communication efforts should be limited to highlighting truly innovative approaches and achievements (as recognized by outside authorities).
- Virtue may be its own reward, but quantifying green policies and practices will lead to better sell-in among all stakeholders.
- Educate, engage, and reward customers for their participation. Green is a collaborative effort.
- Seek credible, respected outside certification. In addition to the initiatives discussed earlier, respected hotel certification programs include Green Globe, which uses strict guidelines to certify properties in 80 countries, and the U.S.-based Leadership in Energy and Environmental Design (LEED) program of the Green Building Council.



“Travel teaches toleration.” –Benjamin Disraeli

Citizens of the World: Philanthropic and Cultural Tourism

Closely related to and reinforcing the greening trends in this category are the overlapping sectors of cultural/educational tourism and “voluntourism,” in which travelers participate in projects to assist the destination community. All fall under the rubric of “meaningful tourism.” This type of travel emphasizes a connection to the host culture and an immersive learning experience over pure leisure and self-indulgence.

Cultural/Educational Tourism

Starting with Herodotus visiting the Pyramids and Hanging Gardens, cultural tourism has a long and distinguished pedigree, and has been well served across the price-point spectrum, from high-end companies such as Swan Hellenic, famous for its cruises and university alumni tours to exotic destinations, to high school exchange and study-abroad programs. Today, this segment encompasses tourism devoted to everything from recent movies (“Tracing the Da Vinci Code”) to classic literature (“Follow in the Footsteps of Jane Austen”), from cultural heritage (“Discover the Real Scotland”) to so-called “dark tourism,” a.k.a. thanatourism (“Hurricane Katrina Tour”). Whatever one’s interest, it’s virtually certain someone has found a way to package it.

Particularly robust these days is gastronomic tourism, which has grown right alongside foodie culture. With culinary, wine, and agro variants, gastronomic tourism, as defined by the U.S.-based International Culinary Tourism Association, is “the pursuit of unique and

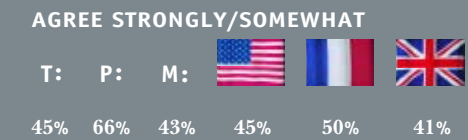
memorable eating and drinking experiences.” By that generous definition, Mintel estimates 27 million Americans, or about 17 percent of leisure travelers, could be described as such.

Culinary tourism can be as modest and ad hoc as tourists making an effort to taste local specialties or as organized as a tour of such foodie destinations as Paris, Tokyo, or Rome, with scheduled restaurant visits, kitchen tours, and meetings with chefs, perhaps accompanied by a food critic or cookbook author. Cooking vacations are an increasingly appealing way to combine gourmet eating with hands-on experience, while enjoying local color and recreation. Prior to its recent demise, *Gourmet* magazine devoted an issue to cooking vacations for every inclination: luxury at a chateau in Bordeaux, with wine and foie gras; adventure in Kuala Lumpur, featuring the preparation of shrimp pastes and curries; health and wellness at a fitness resort and spa in Mexico; or total immersion at the Culinary Institute of America in Hyde Park, N.Y.

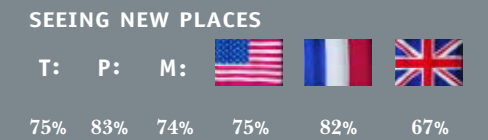
CULTURALLY RICH EXPERIENCES HOLD PARTICULAR APPEAL FOR PROSUMERS

Prosumers pride themselves on being “citizens of the world.” They seek out enriching experiences that widen horizons and foster personal growth.

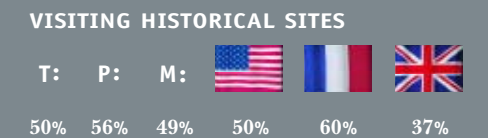
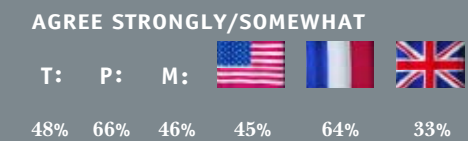
I am a citizen of the world (love to travel and bring home bits from exotic destinations)



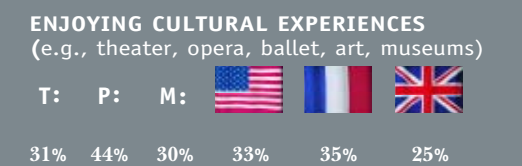
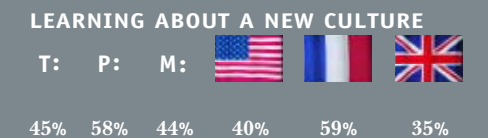
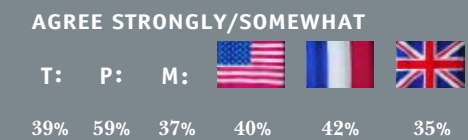
When you travel for pleasure, what are your top priorities (very important)?

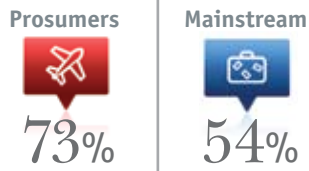


I am a serious-culture lover (literature, art-house cinema, fine art, classical music, etc.)



Where and how I travel says a lot about who I am





“I am a ‘foodie,’ a gastronome”

Voluntourism

While the true ancestor of voluntourism arguably is the Peace Corps, the current iteration has its roots in the increasing emphasis on personal responsibility and communitarian values. In an October 2009 *Monitor Brief* called “Striking a New Deal,” Yankelovich wrote:

People [are] now embedding responsibility in their day-to-day lives. Think of it as responsibility underpinning the “new deal” consumers are striking with themselves—and with the world around them and with the marketplace—that’s both powerful and far-reaching. Conscious, thoughtful decisions are at work, requiring consumers to make many changes—some self-imposed, some imposed by others. Examples are everywhere, from consumers opting to save not spend, to marketing campaigns that give pause and encourage temperance. As the Recovery marketplace starts to take shape, businesses will have to work hard to find the “responsibility voice” that rings true for them.

Euro RSCG’s own research points to a strong desire on the part of many consumers to rethink how they live and what’s important to them. Our 2009 study of the New Consumer, fielded in seven markets (United States, France, Netherlands, United Kingdom, Brazil, Japan, and China), found a majority of the global sample (58 percent, with a high of 70 percent in France) believe society is moving in the wrong direction. Forty-eight percent of these adults claim they don’t always feel like real “grown-ups,” and 44 percent wish they could “start fresh with an entirely new lifestyle.” A pervasive sense of “emptiness” or lack of purpose is evident in the fact that nearly four in 10 (38 percent) admit they sometimes feel as though they’re wasting their lives. A majority (including 72 percent of U.S. prosumers) expressed a desire to be part of a “truly important cause.”

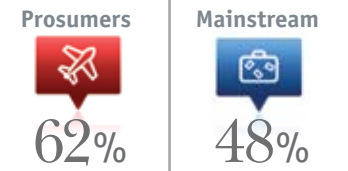
According to a Condé Nast poll, approximately 14 percent of Americans have taken a volunteerism

holiday, with 55 percent saying they would like to do so. While the latter figure may reflect wishful thinking, the attitude is in keeping with the current shift from “checkbook philanthropy” to “participatory philanthropy.” *The GreenMoney Journal* points to people under 25 and over 50—young people sorting out life options and older ones reevaluating their lives and priorities—as the primary target for this type of tourism. The ongoing retirements of baby boomers should ensure a growth market in this industry.

Two organizations taking the lead in this arena are Sustainable Travel International and VolunTourism. David Clemmons, founder of the latter, explains the rationale for why tourists pay good money and travel thousands of miles to labor in a mud-brick village in a remote location—for example, making stoves in Peru:

An important part of what comes out of voluntourism is social capital; it breaks down stereotypes. For the traveler, it can help you retool and rethink your life philosophy, and the local people end up with a different image of foreigners. Is that worth the thousand dollars you paid to build that stove? You betcha!

With thousands of available options—cultural-heritage preservation in Cambodia, teaching in Tanzania, animal therapy for autistic children in the U.S.—the choice can be daunting for the would-be traveler. Thus, organizations in this field employ a business model we can characterize as “Educate, Engage, and Empower”—or “Before, During, and After.” Detailed decision criteria, including self-assessment tools, guide the selection process. Next, these organizations work closely with the various constituencies (including travelers, tour operators, and local organizations) to manage expectations and provide an optimal experience. Blogs, newsletters, and webcasts extend the experience for past participants, while reaching out to newcomers in a virtuous feedback loop.



“I would like to be part of a truly important cause”

Implications

- Opportunities to help customers learn, grow, and feel connected to a broader cause or community aren’t limited to niche travel. Across the T&T industry, there is plenty of scope for brands to engage their customers in this way. Through its Give Back Getaways program, Ritz-Carlton has guests pay for the privilege of devoting a few hours to a good cause. Guests in Washington, D.C., for instance, can help prepare food for the homeless and others at the DC Central Kitchen, while visitors to the Chinese capital may sign on to plant trees with the Beijing Institute. It is a great way for the luxury brand to build stronger links between itself and its customers, while also reminding employees of the company’s people-centered service culture.
- Educational value-adds can tie in to anything from brand history to local culture—or simply take advantage of available skills. A growing

number of hotels are offering in-kitchen cooking lessons, giving foodies an opportunity to learn about new foods or preparation techniques, while also enjoying an “insider” view of hotel life. In Florida, the Quorum Hotel-Tampa entertains and educates guests with weekly interactive cigar-rolling demonstrations and history lessons.

- There is plenty of scope for T&T brands to speak to the growing desire for interconnectedness and a more human approach to travel. A study by *USA Today* found that while guests appreciate high-tech upgrades, they feel hotels are losing their human touch. Wake-up calls from a “real” human being, personalized stationery for longer-term guests, and windows that open are just a few of the ways brands are reinjecting a sense of humanness. The Hyatt Regency San Francisco lets friends and family customize wake-up calls for guests.

Signs of the Times: More “Humanized” Travel Options

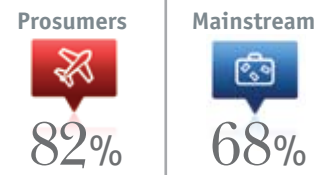
COUCHSURFING.ORG: A network of approximately 1.5 million people who offer their couches, cots, or spare beds to travelers.

WARMSHOWERS.ORG: Couchsurfing for bicyclists.

AIRBNB.COM: Locals rent out their available space (ranging from an air mattress or treehouse to a furnished home). Motto: “Travel like a human.”

HOMEEXCHANGE.COM: Home swapping for vacations.





“Many of my best memories come from vacations and other trips”

So Far and Yet So Near: The Tech-Connect

While communitarian attitudes are currently driving T&T trends, the individual traveler’s ego is still very much a dominant voice, and his or her own experiences are of compelling interest. But unlike Oscar Wilde, today’s travelers insist on not just recording these experiences, sensational or not, but on sharing them with as many people as possible via blogs, Twitter, Facebook, and the like. “Social swarming” behaviors are playing an increasingly important role in shaping the T&T landscape, and it behooves brands to figure out how best to make use of this phenomenon.

Sharing the Experience: Travel and Social Media

From Hertz to Marriott, major brands in the T&T space are embracing social media. Southwest Airlines has 70,000 “fans” on its Facebook page, while JetBlue can boast of 700,000 followers on Twitter. Much more than a popularity contest, the intent of such initiatives is to boost customer service, responsiveness, and positive buzz. Thus, airlines might offer the first notice of a 24-hour sale to its fans on Facebook or Twitter. JetBlue tweets its “cheeps” (discounted fares) on Mondays, good while supplies last, while United offers “twares”—for example, 20 percent off airfare to Brussels “where U can eat more mussels.” Volunteers for Southwest and JetBlue called “tweet watchers” track and advise travelers on issues such as flight delays and traffic jams near airports.

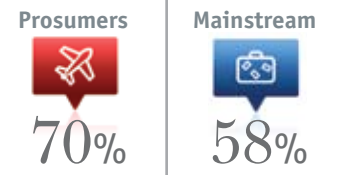
Observes travel troubleshooter Christopher Elliott, ombudsman for *National Geographic Traveler*, “Social media sites like Facebook and Twitter allow travel companies to talk directly to their

customers and for us to talk back.” Because the conversations are in real time, the impact can be immediate. For example, one distressed mother, who learned that her children’s airplane was still on the tarmac after a long delay, tweeted her troubles in a polite message to Virgin Airlines, concluding with “pls RT,” a request to her 10,000 followers to “retweet” the message. So many did so within minutes of her post that the airline phoned to reassure her that her children were fine. With scattered properties and no instantaneous way to call Housekeeping, Florida vacation-rental company ResortQuest relies on its strong Twitter presence to provide quick solutions to problems that arise.

YouTube also offers new ways of connecting and communicating. As unwary politicians have learned, the video site can garner more publicity than the most expensive, best-orchestrated media campaign. United Airlines learned this to its dismay when singer Dave Carroll of the Sons of Maxwell band

“I never travel without my diary. One should always have something sensational to read on the train.”

—Oscar Wilde



“I enjoy planning vacation travel; it’s fun to explore all the options and find the best deals”

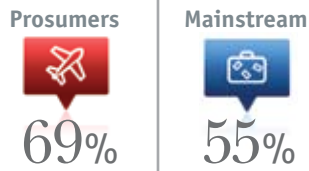
posted “United Breaks Guitars,” a clever music video reenacting how careless baggage handlers broke his Taylor guitar and the indifference of service employees who subsequently dismissed his claim. Air New Zealand’s in-flight safety video, “The Bare Essentials,” drew 4.7 million hits on YouTube, entertaining viewers with safety announcements cheerfully provided by crew members wearing nothing but body paint. Far cleverer than titillating—with the paint mimicking uniforms, down to ties, pins, and buttons—the video also served to reinforce the airline’s brand message: “Our fares have nothing to hide.”

Travel blogs also continue to proliferate, of course. Among those worth noting: Gridskipper, from the Gawker blog family, offering the last word in hipness for urban travelers, and Gadling, updated daily, which includes great travel literature, as well as postings of current events (e.g., a Ben-Hur chariot race reenactment in Jordan) and podcasts from travel writers. Companies weigh in with The Lobby, Starwood’s corporate blog, and Marriott on the Move, by CEO Bill himself. Blogs help to make travel more of an ongoing experience, encompassing the “Before, During, and After.”

EARTHWATCH

“It’s 2:30 in the morning and here I am, sitting on the roof of an open top 4 by 4, torch strapped to my head, a satellite radio tracker in one hand and a clipboard resting on my knee,” blogs Zoe Gamble, a volunteer with an Earthwatch field research project in Kenya. Her task: monitoring the behavior of the maneless lions of Tsavo (whose man-eating ancestors inspired the movie *The Ghost and the Darkness*). Researchers hope to learn how the lions and the local Maasai herding population can coexist, with important implications for public policy and conservation.

Integrating the best aspects of eco-, volunteer, and cultural/educational tourism, Earthwatch supports more than 100 field research projects with grants and provides as many as 3,500 motivated volunteer assistants to scientists engaged in research around the world. The volunteers contribute more than time, energy, and intellectual curiosity to the individual projects; they also communicate the importance of the research and support for local communities by sharing their experiences with friends and family through on-site blogging, and discussions and continuing involvement afterward. Earthwatch, too, practices a “Before, During, and After” model of engagement.



“One of the best things about travel is talking about my experiences afterward”

Where R U?

With its MAPMANIA trendsighting, global futurist firm Trendwatching.com points to the convergence of maps and social media. It was a short step from blogging about one’s trip to including links to Google maps. Now people are using map applications on social media to engage in continuous travel conversations. Dopplr.com is a travel-planning site on which visitors plot out past, current, and upcoming travel, offering and receiving insights into the best (and worst) restaurants, accommodations, and the like. Dopplr also shows “coincidences,” alerting users to friends and acquaintances whose itineraries overlap with their own, enabling people to meet up on the go. A “green” app lets users calculate the carbon footprint their journeys produce.

Foursquare, one of the newest social-swarming entrants, combines a friend-finding city guide with competitive bar-game apps, appealing to hip, young urbanites in 34 North American cities, plus London and Amsterdam. Incorporating elements of gaming and social competition, the system awards points and virtual badges to players based on frequency and breadth of places visited. Users who visit a particular location enough times are anointed as “mayors.”

Implications

Most T&T companies are in the beginning stages of developing their social-media strategies. Beyond gaining presence, building buzz, and being “on site” for damage control, the most forward-looking brands are seriously evaluating the potential of social media to drive a revolution in customer service and brand building.

Some points to consider:

- Not all social-media users are born equal. Targeting the prosumers among them will spread messages faster and more powerfully. Consider how best to engage prosumers online and involve them in content creation.
- Done right, social media still has the capacity to confer a patina of coolness or hipness on a brand. Brand loyalty requires something deeper, however: the strengthening of brand-to-consumer and consumer-to-consumer connections. Consider what innovative apps can improve the customer-service experience; inject a layer of fun, surprise, and humor; and/or connect travelers to one another and to family and friends.

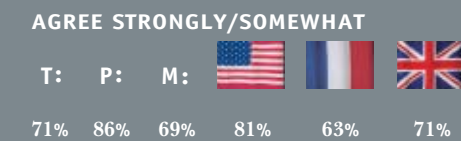
“Will 2009 be the year in which all things ‘contextual,’ ‘app,’ ‘local,’ ‘urban,’ ‘tags,’ ‘lidar,’ ‘smartphone,’ ‘convenience,’ ‘Cell ID,’ ‘spontaneity,’ ‘infolust,’ and ‘GPS’ come together in one orgasmic celebration of map-based tracking, finding, knowing, and connecting?”

–Trendwatching.com

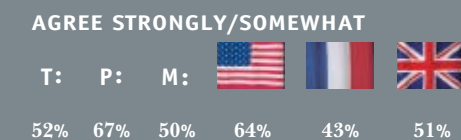
PROSUMERS & ONLINE TRAVEL PLANNING

As in other categories, prosumers are at the forefront of using technology to assist them in their travel planning, purchases, and experiences.

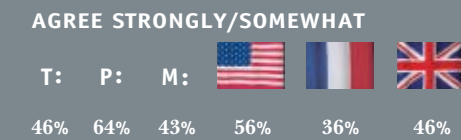
The Internet is an important part of my travel planning



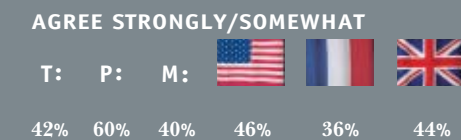
I’d rather book a trip over the Internet than meet with a travel agent



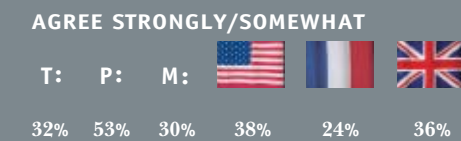
I have chosen a hotel or other accommodations based on recommendations/ratings from people online



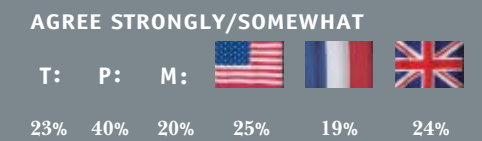
I read travel-related blogs or visit independent travel-related websites (not owned by an airline, hotel, ticket seller, etc.)



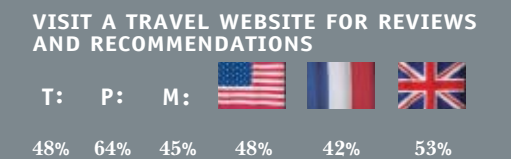
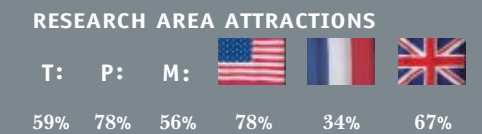
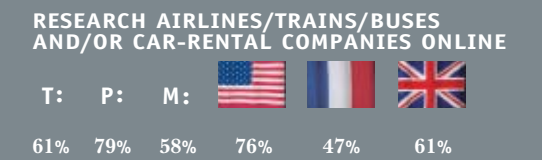
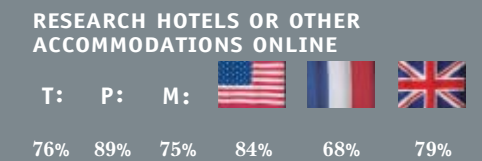
I have chosen a travel destination based on recommendations/ratings from people online



I have posted a comment or recommendation on a travel-related blog or website



Which of the following do you typically do when planning a vacation?



Luxury and Service Redefined: Taking Advantage of Emerging Codes

While overconsumption was the common practice prior to the economic downturn, we're now seeing a countervailing trend of mindful consumption that is changing how people define value (see *KNOW: The Future of Value*) and what they seek—and increasingly expect—in their brand experiences. Where once “more was more,” now different perspectives on luxury and service are emerging, with interesting implications for T&T.

Luxury Next

Rough Luxe is a movement and a group of like-minded hotels, restaurants, retailers, and artisans connected by a philosophy of luxury that emphasizes authenticity over “bling” and experiences over excess. The movement began in 2008 with London's Rough Luxe Hotel. Located in an iffy area of King's Cross, this unique hotel celebrates the ambience of contrasts: architectural heritage versus gritty neighborhood, high-end amenities versus reclaimed furniture. Rooms boast original artwork and elegant bed linens alongside 25-year-old televisions and wallpaper peeling down to the 1920s stratum in a kind of urban archaeology. Priced at around \$200 per night, each room offers a chic and engaging experience far removed from standard luxury fare. For its interior designer, Rabih Hage, a graduate of L'Ecole des Beaux Arts in Paris, this is a deliberate philosophy and practice. In interviews, he has noted that luxury should be about rarity, not duplication: “It's not about bling or expensive objects,” he explained in *The New York Times*. “It's about remaining true to real provenance.” Guests at the hotel or any other in the Rough Luxe Experience network might share a bathroom or have a small room, but they will find luxury in the surroundings, the choice of wine, the art on the walls, and in the service provided by the staff.

Network members include hotels and lodges in Cape Town, St. Moritz (a cowshed habitation with an upscale, organically sourced restaurant), Costa Brava, and on a private island in Ireland. Criteria for prospective members include a unique location and a historically or architecturally significant building;

design and decor featuring a mix of old and new; original artwork; organic, locally sourced food; and physical comfort—but not at the expense of the intellectual exchange of ideas and personal enrichment.

A similar high–low series of contrasts and emphasis on personally enriching experiences plays out in the trend of “flashpacking,” where *flash* can stand for both style and flash drive. The next generation of backpackers, flashpackers eschew traditional youth hostels and other bare-bones accommodations in favor of boutique hotels and bed-and-breakfasts. Their version of “roughing it” comes complete with such must-haves as laptop computers and GPS systems. Unlike the impecunious backpackers of old, flashpackers can afford to splurge on good meals, fine wines and beers, and the nightlife. Rather than getting away from it all, these travelers often blog or tweet about virtually every detail. (“We set out at 2 a.m. from our hotel, arriving at about 3:15 with our guide Ketuk at the temple that serves as a 1,500-meter base camp.”)

A number of hostels are adapting to this trend, becoming more like hotel/hostel hybrids. One such boutique hostel, the Daddy Long Legs in Cape Town, has rooms individually designed by a local artist, while Berlin's high-tech Baxpax Downtown offers hip ultra-modern gizmos and gadgets. In Girona, Spain, the Centre Ecologic Ilemena operates according to sustainable practices, including organic food and water pulled from a well. A floating hostel is available on the *Rygerfjord* ship in Stockholm, with water views from the top-deck bar.

“We're going flashpacking. What's that? It's like backpacking with less pack and more flash. We're packing less and buying more along the way. For the most part, we're skipping hostel cooking, chicken buses, and group accommodations in favor of restaurants, discount airlines, and something with a lock on the door, a soft bed, and sometimes Wi-Fi.”
—Curtis, writing on Flashpackinglife.com

The New Service Paradigm

Decipher® is a methodology Euro RSCG has refined from semiotics, the study of visual and verbal signs and cultural codes. It allows us to determine changes in category communications and to anticipate future shifts. As part of our T&T study, we applied this tool to the subject of “service.”

To understand service, one must first examine the topic through a cultural lens, as expectations and characteristics of service vary from place to place and have shifted over time. In the supposedly egalitarian U.S., the service ideal, if not the practice, is a voluntary exchange between individuals on equal ground. Service has traditionally been something one purchases, with the buyer receiving the level of service he or she has “paid for” (the more expensive the venue, the better the service is expected to be). In the U.K., class hierarchy (though increasingly defined by money rather than breeding) still has a role to play between service provider and client. There is a cultural expectation of service as a “right”; hence the growth of so-called “service rage,” an emotion particularly associated with unresponsive call centers.

In traditional Eastern cultures, the heritage of service is deeply ingrained. In India, for instance, service is centered on the philosophy of “Atithi Devo Bhava,” meaning “guest is god.” Personalized service, attention to detail, and unflagging courtesy are expected. In Japan, service is entirely entwined in the fabric of society in the sense that it is considered essential to maintaining harmony. “Perfect service” is idealized as flawless and fluid. Even when highly stylized (as in the Japanese tea ceremony), it is expected to maintain the appearance of a natural, authentic grace. Japanese service is more lateral than it might appear to the outsider: Excellent service

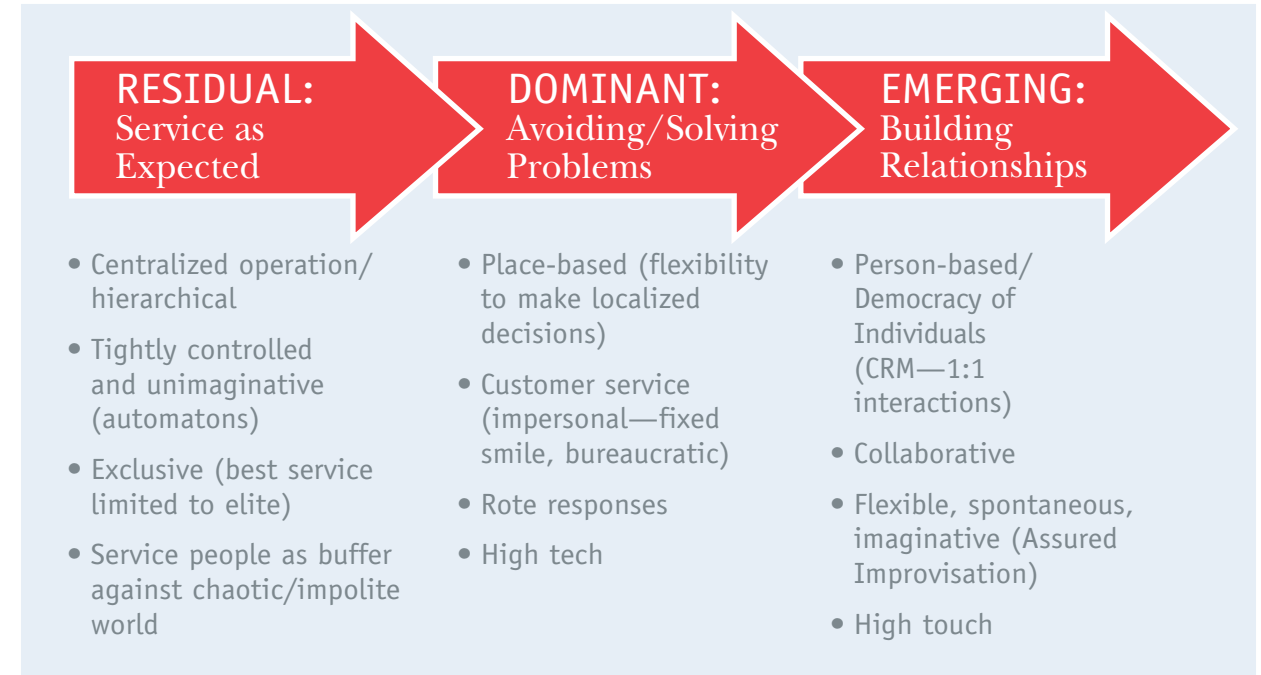
honors not just the customer but the server and, by maintaining social order, the wider society as a whole.

In our modern world, service standards in these and other countries are changing as consumer expectations and corporate capabilities change. This guide focuses primarily on shifts affecting Western cultures, though globalization ensures that no market will be entirely immune.

In the past, within larger corporations, service was highly centralized and tightly controlled. Service workers were expected to be courteous rather than considerate, professional rather than caring. Their tasks and boundaries were clearly delineated, with no room for improvisation. The highest levels of service were restricted to the upper classes.

Recently, service has been increasingly democratic, with customer service seen less as a “value add” than as an expected accompaniment to every purchase. Service employees are trained to be friendly and accommodating, but also to remain well within the bounds set by the corporate center or local executives. There is little room for spontaneity or more personalized interaction.

Now our Decipher research has uncovered signs of another shift, this time toward a more humanized approach to service. Rather than “putting out fires” (addressing customer complaints and crises), personnel are expected to develop relationships with customers based on collaboration and mutual respect. It is no longer a question of the service provider approaching the client deferentially, cap in hand, but of equals working together to ensure the customer's experience is everything it possibly can be. Two important concepts are at work here: “Democracy of Individuals” and “Assured Improvisation.”



DEMOCRACY OF INDIVIDUALS: The underlying principle here is that the best service is provided by a team of equals with complementary skills working together toward a common goal. Ironically, this concept is perhaps best captured by the *Ocean's Eleven/Twelve/Thirteen* heist films. The idea is that each service provider is uniquely capable of adding something to the total service equation, whether it be an encyclopedic knowledge of nearby attractions, a deep understanding of local history, an ability to reassure panicky fliers, or a gift for intellectual engagement. This more collaborative approach allows brands to move beyond "customer service" to "customer relationships," from impersonal, bureaucratic systems to anytime/anyplace, personalized service. Key to success is the ability to exceed customers' expectations while also expanding their horizons.

ASSURED IMPROVISATION: Part of the value of a Democracy of Individuals comes from these employees' ability to adapt and respond to shifting conditions with ingenuity and resourcefulness—a sort of "What would MacGyver do?" mentality, inspired by the 1980s TV hero's on-the-fly transformations of everyday objects into lifesaving devices. Like a Louis Armstrong or Ravi Shankar, these supremely talented and trained individuals don't make it up as they go along; rather, they work within existing templates to create something new and sublime. This shift involves moving beyond *programmed* to *empowered*, from *proactive* to *responsive*, rejecting rote answers in favor of

asking the right questions. This emergent form of service is about discovering and fulfilling *individuals'* unexpressed desires, not about assuming what those desires will be.

Implications

To stay on track with these trends, marketers must be attuned to nuance and able to deconstruct customer communications to determine deeper meaning. Ultimately, redefining service is about rethinking the brand's and employees' approach to communication.

Some considerations:

- Rough Luxe arguably has gotten a boost from the economic downturn, but the underlying attitudinal and behavioral motivations represent a strong emerging philosophy of anti-excess and pared-down consumption. Respect that by seeking opportunities to offer select aspects of an experience, rather than an all-you-can-whatever extravaganza.
- Consider what changes in hiring, training, and corporate culture will empower employees to offer responsive service. Granted, it is a paradox, but freedom and empowerment do require standards and policies.
- Our instantaneous-communications culture has raised expectations. While problem-solving is rarely instantaneous, acknowledgment of the problem should be. Strive to narrow the gap between acknowledgement and implementation.

On the Horizon

If trends give rise to more trends, what might we expect over the next five or so years? Drawing inspiration from the attitudinal and behavioral changes behind the mutually reinforcing trends outlined here, two areas of particular interest—and promise—emerge:

Slow Travel

A sibling of the slow food movement, slow travel at its most elemental is simply “relearning the art of traveling.” At its current stage, it embodies a philosophy and a group of practices that focus on an immersive personal connection with the destination visited, getting to know the community, its history, and its culture at a pace sufficiently languid to allow for unexpected discoveries and simple pleasures. In *History Writ Small: Exploring Its Nooks & Crannies by Barge, Boat, and Balloon*, veteran traveler Priscilla L. Buckley writes of a lifetime of slow travel. Comparing one of her preferred modes of travel with those experienced by most tourists, she writes: “The advantage of the small passenger steamer is that aboard it one explores not only the high spots but also the smaller temples and cliff tombs, the mortuaries where mummified ibises, baboons, and crocodiles are buried by the thousands; one sees the countryside As It Is Lived. The tourist in a hurry will never see the Temple of Khnum at Esna, the temple you go down to visit: It has been dug out from under the modern town. Or Edfu, possibly the most beautiful, certainly the best preserved of the Ptolemaic temples...Or wake up one morning in the shadow of Kom Ombo, which stands on a promontory at a bend of the Nile.”

One guideline suggests that tourists commit to a sizable chunk of time at each destination, exploring it in concentric circles—and preferably on foot, by bicycle, or by local transport—to develop a deeper connection. This low-impact approach shares some elements of ecotourism, but focuses more on relaxation, “the spirit of the place,” and the slow unfolding of experiences in a way that harkens to an earlier time.

Virtual Tourism

Virtual Tourism, which may one day give tourists access to remote, inaccessible, fragile, or closed cultural and natural heritage sites, represents one of the most exciting potential developments. It may be the ultimate in green tourism: no-impact travel. In a recently published book, *Virtual Reality: Applications and Implications for Tourism*, Daniel Guttentag identifies six areas of tourism in which virtual reality (VR) can make uniquely valuable contributions: planning and management, marketing, entertainment, education, accessibility, and heritage preservation.

To fragile sites such as Lascaux, with its remarkable Upper Paleolithic cave paintings (now closed to visitors), the Khmer sites of Cambodia, or the Egyptian tombs—where the moisture from the breath of too many tourists, not to mention their footprints, can cause damage—VR may offer a new lease on life. Current applications include “The Cradle of Humankind” at the Maropeng World Heritage site in South Africa, where a virtual underground cave with interactive exhibits makes the fossil grounds accessible to visitors while preserving the ecologically delicate site. Future developments in state-of-the-art VR might allow millions of visitors to experience fragile locales with all of their senses, establishing a vivid and enduring emotional connection that will ensure greater public support for the preservation of World Heritage sites.

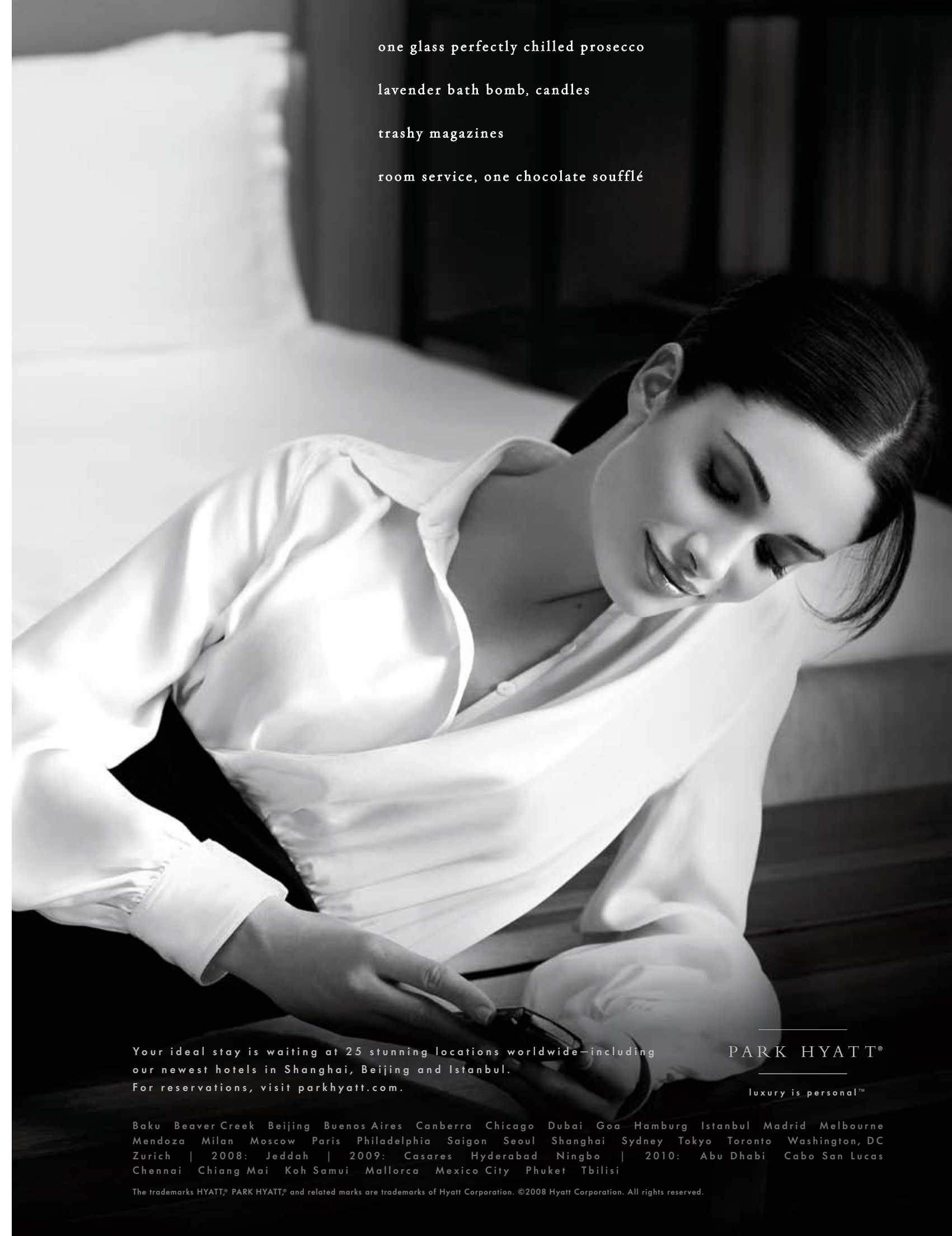
VR’s potential marketing applications are plentiful, moving far beyond the current panoramic hotel room tours available online to complete sensory experiences that give potential visitors a taste of the reality to be had—and reconnect past customers to the experience. Yet another opportunity to establish deeper and more meaningful connections.

one glass perfectly chilled prosecco

lavender bath bomb, candles

trashy magazines

room service, one chocolate soufflé



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luxury is personal™

Baku Beaver Creek Beijing Buenos Aires Canberra Chicago Dubai Goa Hamburg Istanbul Madrid Melbourne Mendoza Milan Moscow Paris Philadelphia Saigon Seoul Shanghai Sydney Tokyo Toronto Washington, DC Zurich | 2008: Jeddah | 2009: Casares Hyderabad Ningbo | 2010: Abu Dhabi Cabo San Lucas Chennai Chiang Mai Koh Samui Mallorca Mexico City Phuket Tbilisi

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Global respondents spend a mean of 11.3 hours planning the typical vacation



Rules of the Road

Companies that wish to be well positioned for the future will incorporate these behaviors into their marketing plans:

Continue the Conversation

We began this exploration by looking at the new vocabulary of travel and tourism; these words have led us to an appreciation of the ongoing conversation between and among consumers and T&T brands. Because people consume travel less frequently than many other categories, and because they are less attuned on a daily basis to T&T advertising, it is all the more important to strike up conversations that forge meaningful connections with the brand.

Focus on Before, During, and After

The travel experience should not be considered a stand-alone event. Ideally, consumer and travel provider will connect early through the search and decision process, and will stay in touch afterward, whether through loyalty programs, updates via a variety of media channels, or partnerships with like-minded companies.

Recognize True Inflection Points

Future-focused brands will assess and act on emerging trends with an eye to both the short and long term. "Now"-focused recessionary tactics should not be allowed to interfere with efforts to keep up with major shifts in ideology and consumption, such as the greening of travel.

Remember: It's All Interconnected

While we have identified four major groups of trends and discussed them separately, they are interconnected and mutually reinforcing. Greenness, greater respect for and support of local cultures, and the new definition of luxury are linked by a desire for a more ethical and sustainable approach to consumption (and life). Social media speak to these desires by providing the sense of connectedness and communalism the modern consumer craves. The new vocabulary of travel and tourism reflects a far broader social movement.

Venise



ne se résume pas à ça.



Ne passez plus pour des touristes.