

TRAVEL TODAY

a brand experience design study

CARTON DONOFRIO PARTNERS, INC.
AND
CONTEXT-BASED RESEARCH GROUP

We design brand experiences from the outside in. We begin by examining every place where a company's brand comes into contact with its customers, prospects and other constituents. By understanding this Contact Zone, we help shape every point of contact in order to build effective brands and help companies deliver better products and services.



CARTON DONOFRIO PARTNERS, INC.



Our recommendations are based on actual customer experience — observing what people do, not just what they say they do. Through our proprietary global network of over 3,000 anthropologists, we develop a unique understanding of the context in which a company's brand functions and an intimate portrait of what it's like to interact with that company. We then use this insight as the foundation on which everything else is built — marketing communications, public relations, interactive media and customer management solutions...everything needed to creatively align and improve every point of contact with a company.

People come first. They have to. In the end, what really matters is that the customer gets something of value. If they don't, they're gone.

INTRODUCTION

What is a brand experience?

Choose a single brand. Now determine all the different ways that consumers interact with that brand. Finally, consider the individual consumer needs that each interaction seeks to fulfill. Add these components and aims together and you've defined a single brand experience. You're now ready to isolate the different parts of the brand experience, find out what isn't working – what needs aren't being fulfilled – and design the entire brand experience.

In order to help the travel industry understand the true behavior of today's traveler, our global network of anthropologists observed, interviewed, and accompanied 100 business and leisure travelers around the world. The insights helped us uncover the current 'travel brand experience' — the sum total of interactions people have during travel. We learned how they travel today, and discovered what they want from their travel experience.

In this report we present and discuss models for the ideal and current travel brand experiences. We also examine the core customer needs currently left unsatisfied in the travel process. We conclude with a set of strategic thought-starters to help companies begin generating ideas for improvement.

THE TRAVEL PROCESS

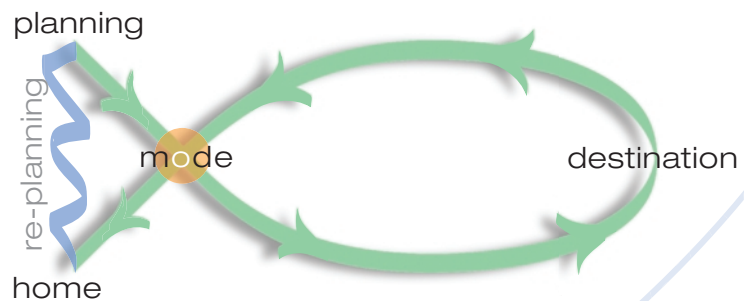
Business or leisure? Same needs.

We initially designed this study around the traditional travel targets – business and leisure. However, as we embarked on the study, we realized that their needs for ‘travel’ were the same. The difference is the level at which the needs must be satisfied. The answer? Address the needs first, the type of traveler second.

Consumers see travel as a process. They *plan* their trip, travel via some *mode* (air, train, ship, car), stay at their *destination* for a time, then pass back through the *mode* to get home. This insight frames our discussion. We learned that if one part of the process is in distress, the whole process suffers. A negative journey damages the experience at the destination. And today’s travel process does not flow easily from one stage to the next.

The following diagram is a simple way to visualize the flow of the travel process and depicts the connection between the stages of the travel experience.

The Travel Brand Experience



Brand Experience Models as learning tools

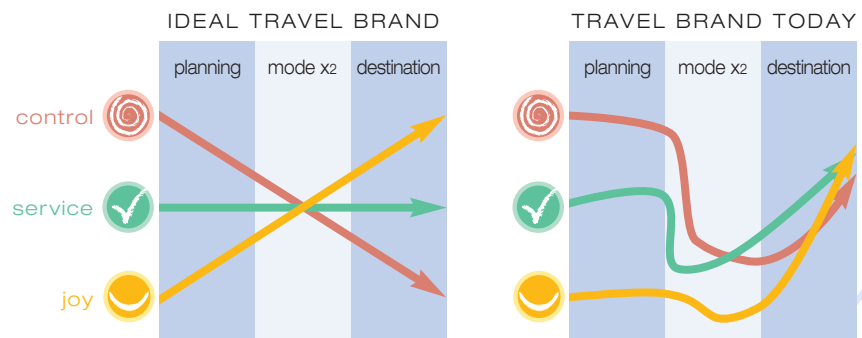
Brand Experience Models help us explain and think differently about how experiences play out for different consumers. They are heuristic, promising no specific solution from the outset, and of course no single model can encompass all travelers. But by thinking about each component and variable on continuums of experience and emotion, you can create precise models for different segments of travelers.

Whatever happens in the mode has twice the impact on the experience — positive or negative. And as customer reactions show, the mode is now in greater distress than any other part of the travel process.

THE TRAVEL COMPONENT VARIABLES



Our study reveals a travel process powered by three variables — the three needs that travelers seek to fulfill. The most basic is that of control over their travel experience. People also demand a consistent level of service throughout the whole process. And ultimately, people want an experience that brings them the joy of travel. Control. Service. Joy. These needs must be satisfied throughout the planning, mode and destination stages.



The two diagrams above illustrate the differences between the ideal travel brand experience and that of today. The ideal model begins with a high level of control during the planning stage. Travelers, especially leisure travelers, slowly relinquish control as they move through their travel brand process. By the time they reach the destination, they want to turn a good deal of control over to someone else, whether it's the leisure resort or the business lodging chain. They want things taken care of *for* them, not *by* them.

Ideally, the service level remains consistent through every step of the travel brand experience. Travelers expect at least a satisfactory level of service at each step of the way.

The joy level rises from planning to a peak at the destination part of the travel experience. Of course, the level of joy at any particular point varies based on the purpose of the trip, but our findings suggest that most trips follow this pattern.

In today's experience however, these fundamental travel needs are not being satisfied. The major source of this distress is the mode, and people cannot easily plan their trip or truly enjoy their destination because of that disruption. **Thus, needs are met minimally in the mode and in turn this lowers the level of satisfaction throughout the whole process.**

Security is ironically the issue that's contributed to the loss of control in the mode. Wherever people find themselves in the process, they talk about security. The whole travel process has been co-opted by security. This is not a problem confined to the mode, though the mode (especially air travel), is now primarily about getting through security and dealing with all of the related hassles.

But what would happen to security if the travel industry focused on satisfying the three basic travel needs outside of the part that is regulated by the government? All changes implemented in the name of security can be considered in light of the overall travel experience, without sacrificing control, service and joy.

This is not just the air travel brand experience

The travel industry, the media, and consumers are myopic about air travel and security at airports. We must pay attention to the other modes and other parts of the process. They may not currently be distressed, but they may be similarly threatened in the near future. It's never been more important to view the travel brand experience as a whole organic process, and to restore the balance of control, service, and joy in all aspects of the travel brand experience.

FOCUS ON THE NEEDS

Brand Experience Design & Ethnography

Observe and interact with people while they travel and you'll get to the true travel brand. One hundred people discussed their travel experience with us while in the process of traveling, in Chicago, New York, Israel, Los Angeles, Tokyo, London, Orlando and Las Vegas. Twenty of those took cameras and photo-essay guides with them to document their travel experience. Ethnographers and business strategists translated the findings, isolated the travel brand experience, and created a way to think differently about travel today.

We suggest re-focusing on satisfying control, service and joy to balance today's travel brand experience. The following sections highlight the results from our study based on each need. Stories and pictures of our subjects' travels support consumer reactions.

CONTROL

The traveler's control need is highest in the planning phase, knowing that they have little control available once they are in the mode. Ideally, this need diminishes over the course of one's journey. The theory? "If I've done my planning right, I shouldn't have to do too much while I'm actually traveling."



THE WAIT

Travel's new pastime, the waiting game. Travelers are forced to give up more and more control during their journey.

Today's travel challenges this theory. People in our study consistently felt helpless, vulnerable, isolated and alone — all emotions opposed to feeling in control. It wasn't surprising to hear people consciously make decisions about how to travel based on the level of control they would have over the process.

Currently, the thought and reality of air travel creates the sense of giving up the greatest level of control.

CARRY-ON WHAT?



Packing is a good place to help travelers maintain control. Martha from Chicago said, "I have to be more aware of how to pack...how to bring what I feel I need and comply with security guidelines."

We found the highest levels of lost control in business travelers.

Their reassuring business travel routine is obliterated, and with it, their productivity.

Leisure travelers translated loss of control into 'precious wasted travel time' en route to their "reason for going" — a.k.a. the destination.

Other indicators around losing control were people's heightened sense of worry about separation from family, public humiliation, and intrusive security measures, like being 'wanded'.

It's a crucial cost benefit analysis that makes for winners and losers in the travel industry. People want control back over their travel process. As the above examples show, the air industry has the greatest challenge when it comes to helping people re-gain their sense of control.

On the other hand, people expressed a greater sense of control, and relief, in the planning and destination phases of the process. Travel agents, rental car companies, and especially hotels give people back their control. They offer people a range of decisions, options and comfort.

PERSONALIZING "INSTITUTIONS"



A traveler can quickly turn an institutional space, like a hotel room, into personal space. This traveler said he "personalized" his hotel room within a few hours by scattering his belongings in order to make it a place he will feel comfortable returning to at the end of the day.

Acknowledging travelers' loss of control in the mode may be a good place to start helping travelers regain control, no matter what industry. Travelers sense an information famine and this contributes to their dismay. In this new environment, over-communicating may be welcomed as empathy and understanding. Advice and reminders about the new travel environment may build credibility for their source.

A final issue to consider is that people in our study clearly felt that security at airports and in the air is a farce. If security represents control, and people see it as unstable, then it makes sense that people feel out of control and helpless.

DISCOUNTS?



Sure there are cheap fares, but travelers remain skeptical. "If the fare is that low, how do they have the money and time do security right?", said study participants.

SERVICE

These days safety takes precedence. To some travelers, safety is becoming synonymous with service, which raises the bar considerably for all in the travel industry. Our study shows that people accept the need for safety, but at the same time are clamoring for better all-around service. Understandably, the level of service that the industry would like to provide in the mode isn't wholly possible given the state of the industry, government regulations, and economy. What the travelers' desires show however, is that since this crucial need is not being met within the mode, they don't feel there is a high level of service at any point in their trip.

People in our study are beginning to feel the only service they get is the service they provide for themselves.

Restoring the perception of high levels of service in travel will be a challenge.

"TERMINAL" SERVICE



Expensive self-serve restaurant fare in New Tokyo International Airport. Air travelers report decreased yet expensive services and "terminal" waiting.

One crucial part of serving the business traveler is making the travel process predictable again. Travel

“HELLO? IS ANYONE LISTENING?”



A traveler in the study mockingly photographs a comment box. “No one hears us”, they think.

companies are trying to help the business traveler allocate and manage travel time more predictably, through potential use of wireless applications that can deliver timely information, and email to help fine-tune scheduling, they strive

to put people or resources into the travel flow to provide information and help with travel options.

Another way to deliver more service is to expand the role of the destination. If you work in that part of the process, are there ways

you can start the “destination experience” sooner in the travel process? Can you deliver something of value to the traveler’s experience before departure or during the travel mode to increase anticipation?

TRAVELLING FOR SERVICE



Consumers want consistent service throughout the process. Some in the study even spoke of “service worth traveling for.”

Finally, affirming the importance of today's traveler seems key. Feeling catered to — even in the smallest way — can brighten a harried traveler's experience. Affirmation

LITTLE THINGS MATTER MORE TODAY



A gift to a traveler from her cruise ship. Memorable service these days makes an extra lasting impression (good or bad).

includes personalizing services whenever possible. Anything that restores a sense of one-on-one connection or exercising a personal option will contribute to an increased sense of service even if associated with service offerings that have been around for years.

 **JOY**

Joy should build through the travel process, culminating in the destination experience and eventually in the return home. According to our study participants, it is difficult to reach the level of joy people desire with all of today's travel interruptions and uncertainties.

SETTING THE JOY BAR



Sue's expectations for her trip are set during the planning process. The industry will need to do more in the planning process to set realistic expectations for people's trips.

In planning, the simplest tasks have to be reconceived. Within the mode, new barriers exist that break the travel flow. The mere perception of potential

NOT QUITE KILLING JOY

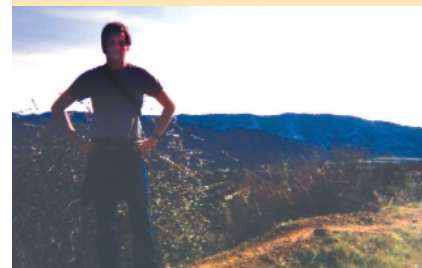


When Karlin travels now, she focuses on threats. "Travel is still liberating, but now I'm aware of taking a risk. I have to tolerate a load of anxiety to do what I want."

problems raises anxiety levels and detracts from feeling joy. Yes, the destination still offers joy, but people showed us that by the time they get to their destination, the level of enjoyment they might have had is diminished. And they still have to get back home, back through the stresses of the mode.

It's clear from our findings that travelers are recalculating the value of their trip on the basis of joy. We saw how anxiety, boredom, depersonalization, emotional trauma and wasted time took their toll on travelers and made them rethink why they travel. In short, the lack of inherent joy in travel undermines the value of the destination and of travel itself.

WORK AND NO PLAY?



A hike during a business trip is "pure pleasure..."

Anything to lift travelers' view so they can see the bigger value in travel will prove beneficial.

Also, travelers need some payback from the process of “going”. Just getting there isn’t enough if one arrives feeling frightened, bored, fatigued or feeling like one’s time was poorly used. Air travel can benefit the most from any gestures to the traveler or innovations that help put the joy back in travel. A good start would be the industry’s recognition of people’s frustration.

Interestingly, with the travel process in distress, the role of the travel agent and planner can be a source of control and comfort. By taking control over the process, they take the worry and anticipation out of travel and allow travelers to focus on



enjoying the travel experience. Travel planners may actually be in the best position for meeting the three core customer needs, because their role extends across the entire travel experience, from planning, to mode, to destination.

CREATING YOUR TRAVEL BRAND

We began by asking, “What is the overall travel brand today?” The question we leave you with is “What do you want **your** travel brand to look like tomorrow?” Answering this question means coming up with strategies and tactics that will satisfy your customers’ needs for control, service and joy.

Based on comments from travelers in our study, we came up with some strategic thought-starters. We hope this gets you moving in the right direction. Just focus on the customers’ needs and see how far you can go.

KEY TO TODAY’S TRAVEL BRAND EXPERIENCE

Regardless of who you are in the industry or where you reside in the travel process, we see three strategic keys to balancing today’s travel experience:



STRATEGIC THOUGHT-STARTERS

1 How do you continually build customer needs into your ongoing brand experience design process?

2 Re-examine your brand's core values. How do they fit with this holistic view of the travel process? How do they work to satisfy the three basic travel needs? What does this say about your travel brand? (e.g. If your core value is on-time departures, have the changes in the current travel brand jeopardized that core service?)

3 Where does your influence in the travel process begin and end? What ways can you think of to expand your influence across the entire process? (e.g. Could a hotel give customers "airport wait time" updates at checkout? Could a travel agent provide safe-travel counseling and individual airport security information to customers before they choose a flight or package?)

4 What kind of services do you use that give people control? Joy? Remember to think across the process, not just "your" part. (e.g. Control: could travel agents call/email their customers during their trip to see how it is going? Could airlines offer a Video Bio of the plane's captain to be aired as part of the safety message? How can you take advantage of baggage claim rather than making it a no-man's land? Joy: Could a resort give its customers a camera to use while visiting? Then, at check-out, give the developed photos to their guest, so they can reminisce during their return journey?)

5 In what ways can you positively affect word-of-mouth today? (e.g. Does your company have an area on your web site that highlights customer testimonials? Do you reward people who have waited in line longer than expected?)

6 How can you help your customers build their level of joy of when they pass through “your part” of the travel process? (e.g. Could airlines provide “place holders” in line, in case the customer wants to go to the restroom or shop? What ways can you offer more assistance at the hand-off points — arrival on property, check-in, rental car return, security, baggage claim, ground transportation?)

7 How can you do more with your current partnerships in order to expand your influence across the entire process? Are there new partnerships to explore? (e.g. Could rental car companies have car returns at airport hotels to save customer time?)

8 How do you also give control, service, and joy to your employees, not just your customers? (e.g. Could you give your employees a discretionary fund to use in an effort to make a particular customer's experience better?)

9 Where and how do your employees learn about delivering control, service and joy? (e.g. Do they learn customer service once at an introductory seminar, or do you conduct continual learning programs? Do you have mentor or reward programs?)

*For more information,
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