An Acxiom White Paper

Life-Stage Travel Marketing:
Delivering the Right Message for the Trip of a Lifetime

by Robert J. Adams with assistance from Harlan Bennett and Mark Legg

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Executive summary

Stan and Margaret just got back from their annual wedding anniversary trip to Hawaii. They usually fly with the same major airline carrier but had a problem at the ticket counter this year and will switch to another airline next year. The couple spends an average of $4,000 to travel, so they don't want a ticket counter problem that might jeopardize the entire vacation, especially because it detracts from the ease of an online ticketing experience.

Stan and Margaret's neighbors, Cathy and Brian, are not married but like to travel together. They prefer the Bahamas — via a fun weekend in New York — instead of Hawaii. Cathy and Brian enjoy staying at major chain hotels but do not insist on the family-style suite hotels that Stan and Margaret prefer. Cathy and Brian are big fans of all-inclusive packages that include an out-island jaunt.

All four of these travelers are the same age, born in 1961. They have the same income and college education levels and similar professional backgrounds. But, despite being categorized as Baby Boomers, they have very different travel needs and preferences.

Recognizing and addressing the differences among the many types of consumers both within and across generations provide the key to successful travel marketing in the future. Understanding the trends that affect Baby Boomers and their Gen X and Y counterparts is essential to capturing future market and wallet share.

According to the Travel Industry Association (TIA), travel is a $1.3 trillion industry in the United States, generating more than $109 billion in tax revenue and creating approximately 7.5 million jobs annually in the U.S. alone. However, as significant as this market is today, there are two major life-stage trends putting the industry on the precipice of tremendous future growth.

These trends are:

1) The largest generation of people in U.S. history are aging and facing retirement, and

2) Life-stage developments in the Gen X and Y categories will likely result in more travel.

What is the impact of travel trends on business strategies?

Travel marketing strategies should dovetail with how and why the Baby Boom, Gen X and Gen Y segments make travel purchasing decisions. Marketing strategies must also resonate with when consumers make travel decisions. The key to success is not to treat all generations like monolithic consumer groups.

To take advantage of the growth potential, travel marketers must understand and address the unique needs of specific segments of multiple generations at each stage of life. The two generations that will account for new growth, Gen X and Gen Y, make up nearly 70 percent of the market. Given the size of these segments, examining the market from macro-generational perspectives will likely no longer be sufficient.

The findings described in this paper illustrate how significant travel habits, such as comparison shopping through the Internet, increased online travel bookings and the desire for more options through travel packages not only vary widely between generations, but perhaps more surprisingly, within generations.

What is the result of the right strategies?

An insightful portrait of the market provides a flexible, evolving approach to life stage-based lifetime customer relationship management. This approach provides an unprecedented understanding of target-market travel needs in a way that is vibrantly descriptive, methodically prescriptive and strategically invaluable. By understanding and anticipating travelers' life stage-based needs, travel marketers can gain customer relationships that last a lifetime.

Acxiom's unique approach to the travel market is based on advanced customer segmentation through a combination of unique products such as PersonicX® Clusters and InfoBase-X™, recognized as the most comprehensive and accurate data available in the industry. InfoBase-X data has recently been enhanced with travel purchase data,

giving the travel marketer improved predictive behavior capabilities. Acxiom data sources go beyond traditional demographic, geo-demographic or custom analytic approaches to capture the significant life changes that can be the catalyst for ongoing shifts in consumer travel needs. Travel marketers who provide consumers with offers that address the consumer's very personal needs stand to benefit most from understanding life event changes.

Life-stage travel marketing is the most effective tool for successfully understanding how to capture increased share in a rapidly expanding market. No other consumer perspective delivers the insight that a life-stage approach can provide to the travel market. Marketers who understand differences between generations and among individual segments within those generations, and who craft unique messages and packages to deliver products at the right time through the right channels stand to gain the most in today's travel environment.

What are the next steps?

This paper illustrates the importance of granular life-stage marketing to the travel industry. If you discover our findings compelling to your business strategies, we would be glad to discuss your specific marketing objectives or explore distinct market segments with high-potential relevance to your success. Please call Acxiom at 1.888.3ACXIOM.

Travel trends in a changing world

Fast facts

According to the Travel Industry Association of America (TIA):

Tourism represents one of America's largest service exports with $108 billion spent by international visitors in the U.S. and $101 billion spent by domestic travelers outside of the U.S.

The travel industry generates more than $109 billion in tax revenue at the local, state and federal levels and creates jobs — 7.5 million in the U.S. alone. Travel touches everyone's life. The busier we become, the more emphasis we place on what we do with our free time. For example, the FAA forecasts that 768 million people will travel by air during 2007. This number is expected to grow to more than one billion air travelers by 2015, and 1.2 billion people traveling by air in the year 2020[1].

But stop just one second. In that second, American and international travelers just spent $22,000 traveling in the U.S. By the time you reach the end of this page (approximately a minute) travelers will spend $1.3 million; assuming it takes you about an hour to read this paper, another $80 million leaves travelers' hands. By the time you put your busy day to rest, even busier travelers will have spent $1.9 billion.[2]

If the current U.S. travel market share increases by just 1%, the domino effect for all other associated numbers is astounding. According to the TIA, a 1% increase in U.S. worldwide market share means $14 billion more in revenue, $3.5 billion in payroll increases and more than 8.4 million in additional visitors. Some estimates put the figure of people traveling worldwide at a remarkable 1.6 trillion by the year 2015.

How can travel marketers turn an upswing in travel planning into a lifetime of travel loyalty and repeat business? As in any other industry, the key to successful marketing comes from a deep understanding of consumer needs, wants and behaviors, and the correlating ability to use that understanding to deliver relevant marketing messages with tailored products and services.

Perhaps in the travel industry more than any other, this relevance ties directly to life events and stages — people make travel decisions about where they want to go based on where they are in their lives.

Who will these travelers be? How does technology affect them?

Acxiom research reveals that three primary generational markets will account for the largest estimated share of travel wallet as the market grows.

These generations are the Baby Boomer, Gen X and Gen Y markets. These groups are defined as the following:

- Boomers — People born between 1946 and 1964
- Gen X — People born between 1965 and 1976
- Gen Y — People born between 1977 and 1994

These three segments individually represent viable strategic targets for travel marketers, particularly when viewed in the context of the following five trends:

Trend No. 1: Baby Boomers hit the road — and the air and sea, too.

Trend No. 2: Gen X ages and their travel needs and desires expand.

Trend No. 3: Gen Y represents the highest potential for future growth, but remains brand neutral and elusive as a target.

Trend No. 4: Technology brings new tools to comparison shoppers and new trends for travel.

Trend No. 5: Lifestyle brands and packaged travel are increasingly popular.

Trend No. 1: Boomers hit the road

As of 2006, the nation's estimated 77 million Baby Boomers began reaching their 60s. By 2010, the segment of the population between 55 and 64 is expected to grow more than any other, at an estimated 5% per year. What does this growth mean to the travel industry?

- First, this generation's life expectancy extends far longer than any other before it. Longer golden years after retirement mean more opportunities for travel. Children of a post-war era of prosperity, the Baby Boomer generation provides not just large numbers but also positive attitudes towards remaining active, both mentally and physically, way into retirement.

- Mature travelers possess two very valuable commodities — money and time. More money, coupled with a greater sense of the world and a media-driven social consciousness of their place in that world, leads mature travelers to more exotic locales.

- As people age, travel also revolves around family ties. Parents who become grandparents of widely-dispersed and very busy children seek out chances for multi-generational reunions driven and often funded by the mature traveler.

Time, money, large numbers, longer lifetimes, close family ties — all of these factors point to opportunities that require intelligent information to turn inquiries into memorable trips and vacations into journeys that last a lifetime.

To be successful over the next couple of decades as Baby Boomers start booming, travel marketers must recognize segments of the population as they start maturing, understand what drives these people as they approach retirement and offer travel services that blend into the mature lifestyle and household.

Trend No. 2: Generation X is maturing and so are its travel needs

Solidly in the middle between the young and free and the big boom, Generation X has left its slacker days behind in exchange for married life with kids or single life with stressful careers and cash to spend on vacations.

Trend No. 3: Generation Y becomes a high-potential segment for future growth

At the far end of the spectrum from the greatest generations, members of Generation Y want travel delivered where they want it, how they want it and when they want it.

More than any other demographic group, Gen Y members are interested in peer-to-peer experiences. Their decision making is heavily reliant on social networks, which is a reflection both of their technology savvy and their cultural beliefs. For Gen Y, the entire world is their playground.

Trend No. 4: The unprecedented impact of technology and media options

Once considered potentially troublesome for traditional travel services, travel-related information and options on the Internet continue to grow significantly and in a positive direction.

During the past year, more people in the United States and Western Europe relied on information found online rather than on word-of-mouth from family and friends to make travel decisions.[3]

With travel already the single largest e-commerce category, Forrester predicts that by 2009 46.4 million households will buy leisure travel online, spending nearly $111 billion. This number can represent 70% of a household's total annual leisure budget.

The following important trends in technology will impact the travel industry significantly in the coming decade:

- Travel suppliers expanding e-marketing efforts

- More travelers booking online travel than ever before

- Travel decisions influenced by increasing demand for high tech services

- Increasing travel options and reductions in the price of travel

- Social computing becoming the norm for an entire generation and likely becoming an integral part of successful travel marketing (e.g. travel review sites, blogs, etc.)

Travel suppliers expand e-marketing

E-marketing continues to expand and become more precise through improved data availability and accuracy. By using the right tools, including advanced customer segmentation and automated e-mail marketing, travel providers can deliver more value through relevant marketing messages sent directly to travelers through a wide range of preferred channels. Channels themselves also continue to expand from TV and print to online and wireless mobile devices.

Travel marketers equipped with better customer understanding and opt-in preferences no longer have to wait for travelers to come to them. With an increased acceptance of e-mail as a preferred channel, a wide range of websites both branded and non-branded, and nearly 80% of households carrying a mobile device of some sort, marketers can deliver targeted messages to existing and potential customers to the preferred point of contact anytime, anywhere.

More travelers book online travel than ever before

Online reservations continue to grow at a healthy pace, offering growth for the travel industry and convenience for today's traveler. The traditional e-travel consumer combines computer savvy with frequent travel planning and spends an average of $2,146 per year for online travel.[4] In addition to using the Internet as an information source, travelers are increasing the amount of travel they actually book online, which represents cost savings for travel suppliers. Certain suppliers, like airlines for example, encourage online reservations by charging fees for traditional booking services while online options remain free.

With half of all adults in the U.S. using travel media to make travel decisions, 24% say that they find Internet websites most useful, followed by newspaper travel articles and television travel shows.[5] Projected growth rates through 2007 include a 15.5% increase in use for online agencies and a 24.2% gain for travel suppliers.[5] The direct online channel will likely continue to be the main focus for hoteliers. The industry as a whole has realized that not only has the Internet become the preferred channel for travel consumers to plan and book lodging, but the direct online channel is the cheapest form of distribution. The shift from indirect to direct online distribution is expected to continue to be a major trend in the next several years. In 2006, the major hotel brands enjoyed an above the average direct vs. indirect online ratio of 81.4% vs. 18.6%.

Travel decisions are influenced by increasing demand for high tech services

Getting wired is helping to drive more and more consumers to online travel services; staying wired is becoming a factor in where they go and stay. According to recent surveys, seven in 10 business travelers took a cellular phone on trips and one in four took a laptop computer. People traveling for pleasure are only slightly less likely to stay connected, with six in 10 bringing a cell phone and more and more looking for services like Internet connectivity from travel providers.[6] As technology makes business more accessible from home and more possible during leisure travel, the line continues to blur between business and leisure travel.

Increasing travel options and reducing the price of travel

As travel options increase and information about travel becomes more readily accessible to travelers themselves, travelers are becoming more savvy about booking their own travel itineraries and finding the best travel deals online. The marketers' ability to manage travelers' online expectations and to create an online brand identity will be crucial for marketing to certain life-stage segments.

Increased competition for travel combined with better travel information can also result in lower costs of travel for consumers. This trend will affect how you, as a travel marketer, create packages and promotions that are targeted, yet profitable.

Social computing is the norm for an entire generation

Social computing is shifting online travel marketing from passive selling to active customer engagement. This change affects every aspect of the way travel marketers distribute and market their products and services.

Technologies enabled by peer-to-peer connections such as blogs, wikis and social networks are changing the way travel is sold. As travelers forge connections and share information with like-minded travelers online, their needs and expectations are changing.

The salient information here, however, is that the impact of social computing, also called Consumer Generated Media (CGM), and its degree of use will vary by age and life stage.

Gen Yers may share photos and experiences via such websites as MySpace.com while Boomers may use sites like Eons.com or BoomerTown.com to research travel. In either case, travel marketers should tune into who is using these online resources and how they are being used to make travel decisions.

In addition, user-generated content is making an impact on consumers and travel suppliers. Travel review sites — such as TripAdvisor.com and Starwood's website called TheLobby.com — now give consumers an opportunity to research, post reviews and learn from other consumers' travel experiences without geographic boundaries.

Trend No. 5: The impact of branding and packaging lifestyles

The last significant trend growing out of changes in demographics, targeted e-marketing and improving technology and online travel involves package travel.

As leisure travel increases, travelers are looking for package options that match their travel preferences and suit their lifestyles. These packages not only represent one-stop shopping for busy travelers, but also represent potential price breaks when combining two or more services into one offer. During the past year, 33.3 million adults say they bought a travel package — a trip that includes a place to stay combined with at least one other option such as transportation or activities.[7]

General responses to these trends

Anticipate the future of travel

In addition to staying in tune with life events, travel marketers must pay attention to the overall trends that drive people to make travel decisions and match marketing offers to these trends as they change over time. For example, the use of technology to take care of more business at home continues to increase the demand for leisure travel for all generations.

Family travel takes center stage as each generation looks at travel as an opportunity to reunite family in an increasingly-fragmented world. Successful marketers look for opportunities to match life events to travel offers across multiple generations and households. Combining this trend with life-event triggers — such as a graduation, a 50th wedding anniversary or the birth of a first grandchild — leads to rich opportunities for relevant travel offers and increased customer loyalty.

The Internet continues to dominate travel planning, which will be further accelerated by increasingly techno-savvy generations. Smart travel marketing embraces Internet-driven comparison shopping by creating lifestyle brands and packaging travel deals targeted at individual generations or multiple generations, such as cruises or family reunions.

Establish a system

A central part of any successful travel marketing strategy involves using internal customer data, external data sources for a universal customer view, automation and technology to deliver relevant travel options through the channel of choice to consumers. By partnering with a provider that can deliver accurate and timely information about consumers at each stage of life, travel marketers can craft relevant marketing messages for just-in-time travel. By automating messages through travel sites, marketers can reach a wider audience across all generations. The ability to deliver targeted messages through other media including e-mail, PDAs, mobile devices and even traditional print or travel brochures will determine who reaches the customer first with the most beneficial information to seal travel deals.

Talkin' about my generation

Now that we have examined travel trends, we will explore the impact of these trends on travel marketing when combined with generational needs and wants.

The first step toward establishing the kind of customer loyalty that leads to lifetime relationships involves understanding each generation of consumer and each sub-segment within those generations.

As generational, technological and marketing trends converge over the coming decade, successful travel marketers will determine how to take advantage of more information about customer life events and preferences to create unique travel offers, packages and brands that fit nicely into different lifestyles.

As with any customer-facing service industry, the travel industry's best formula for success includes establishing meaningful customer relationships over time. To do this, travel marketers must understand customer needs today and as they change over time and most importantly, must meet their customers with relevant products and services at each stage of life.

Acxiom research illustrates that each generation includes sub-segments that differ in meaningful ways. The remainder of this paper explores exactly what the significance of these differences means to the future of travel marketing.
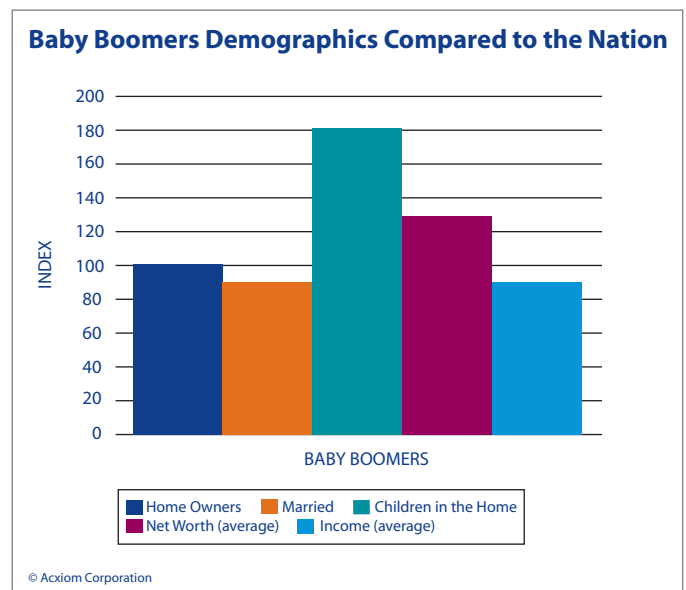
Boomerang

Much has been said about the Baby Boom generation and its influence on economic factors in general and with respect to travel in particular. Of all generation groups that travel, Boomers travel the most, logging 375.5 million trips in 2004 with the number of trips per year continuing to increase.[8] Capturing the attention of this group as they move toward retirement may mark the difference between success and failure for many travel providers.

For travel professionals, Baby Boomers are usually the main target. These older affluent consumers generally have all of the material goods they need and are starting to focus on rewarding themselves with the upscale experiences they postponed while raising their children, and that means travel. Younger affluent consumers are spending, but at this stage in their lives, much of their spending is focused on houses and household luxury items or cars. Learning and understanding the spending habits of the younger generations will prepare travel professionals for this group as they reach an age and life stage where travel plays a larger role in their lives.[9]

So, how do travel marketers catch the boomerang as this generation moves into retirement years with more free time and the longest projected life expectancy of any generation so far? To add complexity as this generation matures, many will continue to work on various levels, generating earnings into their later years. Surveys of Baby Boomers show that roughly half expect to retire after age 65 and over two-thirds intend to work after they formally retire. Many will work for financial reasons, but a surprisingly-large number will continue working to stay active in retirement.[10]

The answer lies in understanding the unique segments that make up this diverse and informed generation and targeting specific types of travel directly to individuals. The following chart provides a closer look at the Boomer generation:

Chart 1: Boomer generation demographic portrait

Baby Boomers Demographics Compared to the Nation

BABY BOOMERS

Legend: Home Owners, Married, Children in the Home, Net Worth (average), Income (average)

© Acxiom Corporation

As the chart shows, Boomers rank above the national average of 100 for net worth and the presence of children and at or slightly below average for home ownership, being married and income.
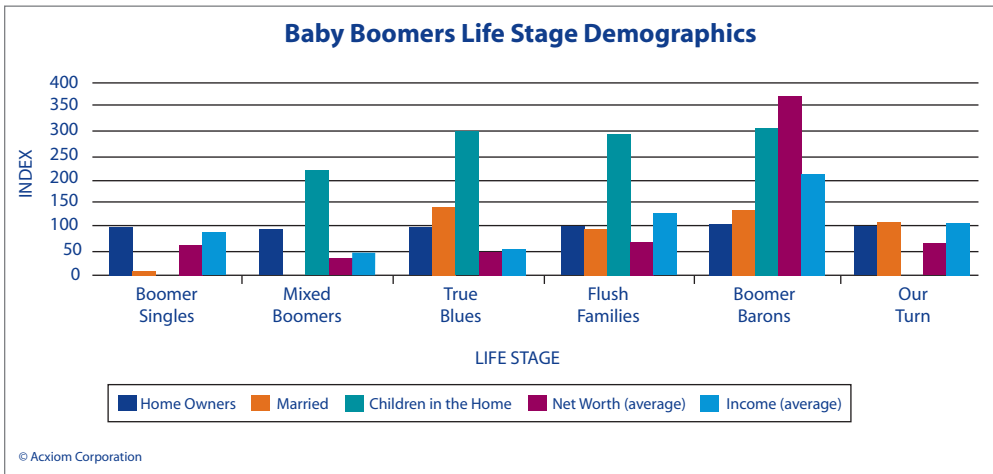
However, this portrait is very misleading from a marketing perspective. A deeper exploration of this group reveals differences in key demographics and life stages within the Boomer generation.

Chart 2: Boomer demographics by segments

Focusing on the theme of life stage as a driving force in decision making, we have identified the following sub-clusters within the Boomer generation:

This detailed chart tells a very different story and would provide information useful to developing marketing strategies in multifaceted ways. This data demonstrates, for example, that only certain Boomers have children in their homes and that the range of net worth is very broad across constituent segments. Travel marketers must seek out and address these differences.

As demonstrated in the preceding chart, the Boomer generation actually consists of six distinct segments with very different travel needs and distinct travel propensities. These segments include Boomer Singles, Mixed Boomers, True Blues, Flush Families, Boomer Barons and

Baby Boomers Life Stage Demographics

Legend: Home Owners, Married, Children in the Home, Net Worth (average), Income (average)

X-axis (LIFE STAGE): Boomer Singles, Mixed Boomers, True Blues, Flush Families, Boomer Barons, Our Turn

Y-axis (INDEX): 0 to 400

© Acxiom Corporation

Our Turn. For detailed descriptions of the characteristics that make up these segments, see *Appendix 1: Boomer segment PersonicX groups.*

To illustrate how essential the recognition of intra-generational differences is to travel marketing, let's look at specific travel-related portraits.

Chart 3: Travel to Disneyworld, Orlando

The following chart highlights differences within Boomer segments related to destination preferences:
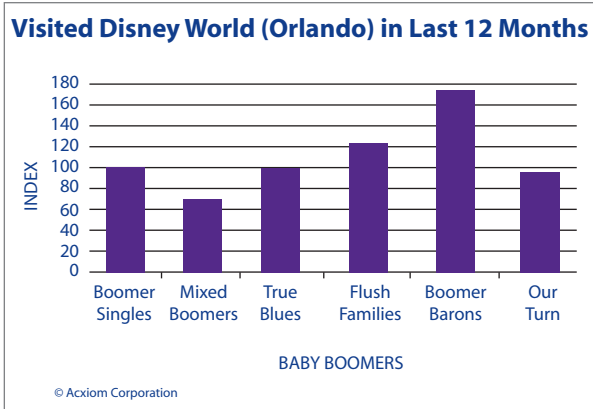
Visited Disney World (Orlando) in Last 12 Months

INDEX (0–180)

Boomer Singles · Mixed Boomers · True Blues · Flush Families · Boomer Barons · Our Turn
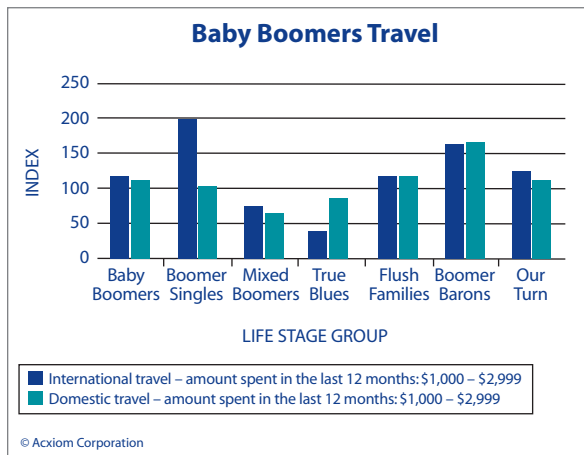
BABY BOOMERS

© Acxiom Corporation

Chart 4: Boomer spend on domestic and international travel in last 12 months

In addition to distinct destination preferences, individual segments within the Boomer generation also have different domestic and international spending portraits.

Baby Boomers Travel

INDEX (0–250)

Baby Boomers · Boomer Singles · Mixed Boomers · True Blues · Flush Families · Boomer Barons · Our Turn

LIFE STAGE GROUP

■ International travel – amount spent in the last 12 months: $1,000 – $2,999
■ Domestic travel – amount spent in the last 12 months: $1,000 – $2,999
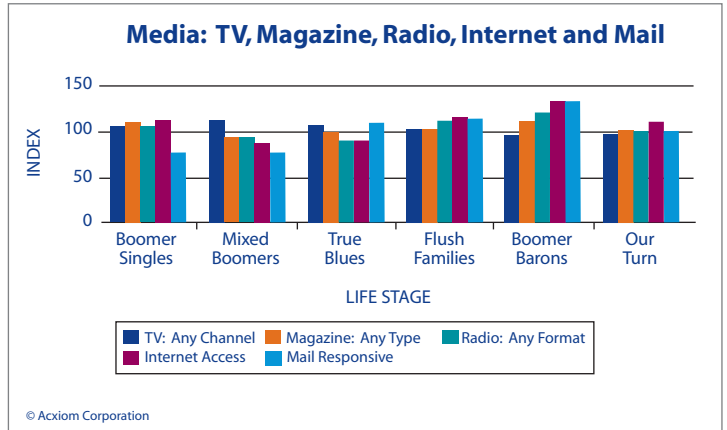
© Acxiom Corporation

Travel marketers must understand differences within sub-segments to communicate effectively. Understanding these intra-generational differences will allow smart travel marketers to take advantage of trends in branding and to offer development and packaging targeted at high-growth potential Boomer pockets.

Again, looking at Boomers as a single group will yield irrelevant or even misleading information. But, if you look at a group from its constituent elements, genuinely valuable directional information is available.

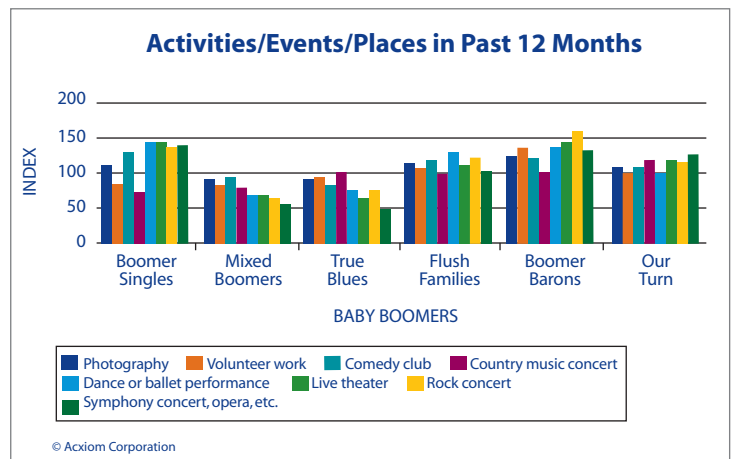## Chart 5: Comparative Boomer media behavior

The following chart provides an example of media behavior among the different Boomer sub-segments:

Media: TV, Magazine, Radio, Internet and Mail

INDEX (0–150)

Boomer Singles · Mixed Boomers · True Blues · Flush Families · Boomer Barons · Our Turn

LIFE STAGE

■ TV: Any Channel ■ Magazine: Any Type ■ Radio: Any Format
■ Internet Access ■ Mail Responsive

© Acxiom Corporation

These portraits indicate some very valuable media preference information. In this instance, Boomer Barons and Mixed Boomers have very different media preferences, and strategies for reaching these sub-segments should reflect the differences. For example, Boomer Barons are more than twice as likely as Mixed Boomers to respond to direct mail.

Chart 6: Boomer segment hobbies and cultural activities

The following chart shows the types of hobbies and activities for various Boomer segments. These portraits are extremely helpful to travel marketers who are looking for ways to engage members of these groups.

Activities/Events/Places in Past 12 Months

INDEX (0–200)

Boomer Singles · Mixed Boomers · True Blues · Flush Families · Boomer Barons · Our Turn

BABY BOOMERS

■ Photography ■ Volunteer work ■ Comedy club ■ Country music concert
■ Dance or ballet performance ■ Live theater ■ Rock concert
■ Symphony concert, opera, etc.

© Acxiom Corporation

While Boomers as a whole participate above the national average in horseback riding, canoeing, kayaking, backpacking and hiking, the younger Boomers are clearly more involved in more vigorous outdoor activities. Making strategic marketing decisions requires this level of granularity to be successful during execution.

X marks the spot

Solidly in the middle between the young and free and the big boom, Generation X has left its slacker days behind in exchange for married life with kids or single life with stressful careers and cash to spend on vacations.

As with the Boomer generation, the Gen X segment is made up of a wide spectrum of groups. Travel marketers working on a successful plan for capturing Generation X would do well to remember the pendulum swings between married couples with young children and single adults with money and the confidence to fly solo.

Chart 7: Gen X demographic portrait

A generic Gen X portrait reveals the following:

Generation X Demographic Portrait

© Acxiom Corporation
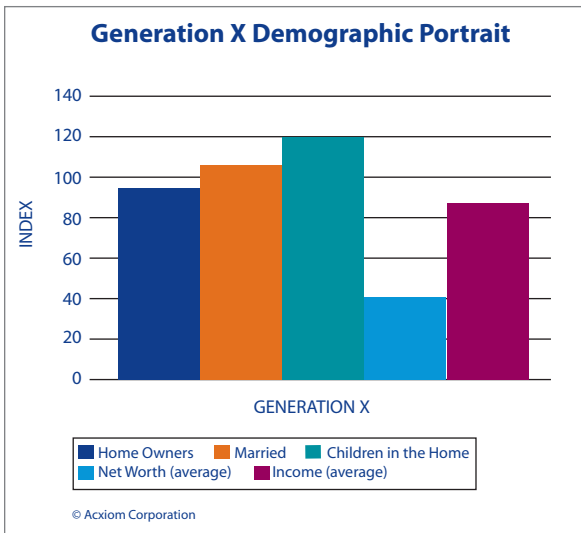
However, six very different segments comprise this generation. These segments include Gen-X Singles, Transition Blues, Cash & Careers, Mixed Singles, Gen-X Parents and Jumbo Families. See *Appendix 2: Gen X segment PersonicX groups* for more detailed descriptions of the characteristics that define these segments.

Chart 8: Gen-X demographics by segments

Here the differences among Gen-X clusters are wide, with Cash & Careers indexing at 220 (more than twice the national average), but Gen-X Parents and Transition Blues indexing at 52.
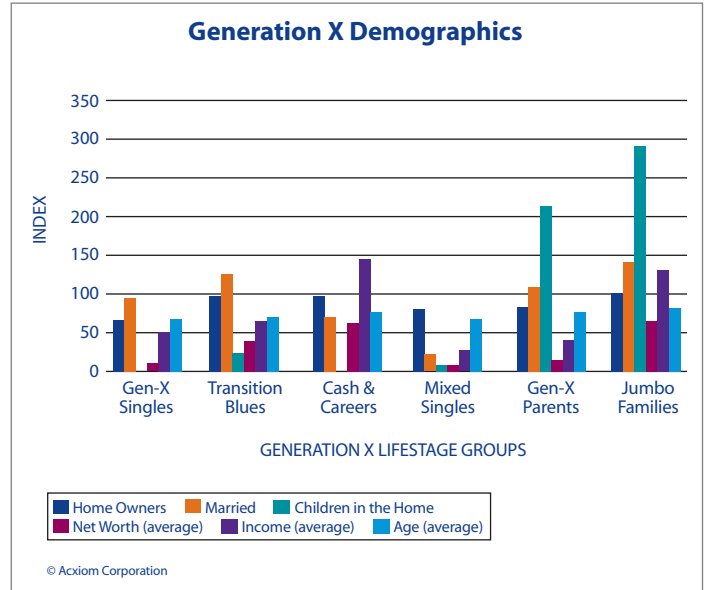
Generation X Demographics

© Acxiom Corporation

Chart 9: Gen X visited Japan, China and Asia

Again, let's look at a portrait for likelihood to travel to Asia.

Visited Japan, China and Asia in Past 3 Years
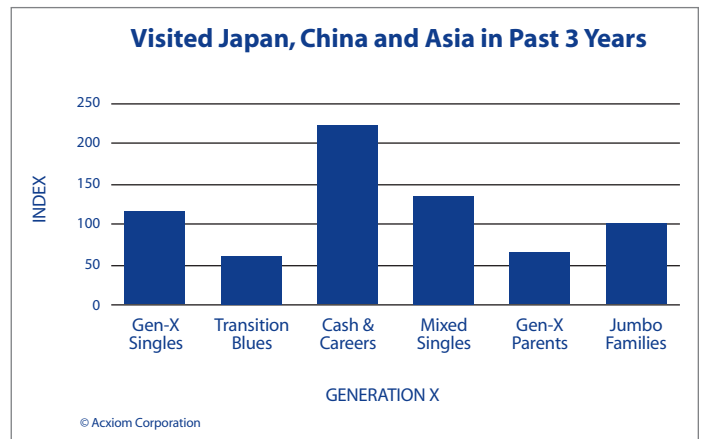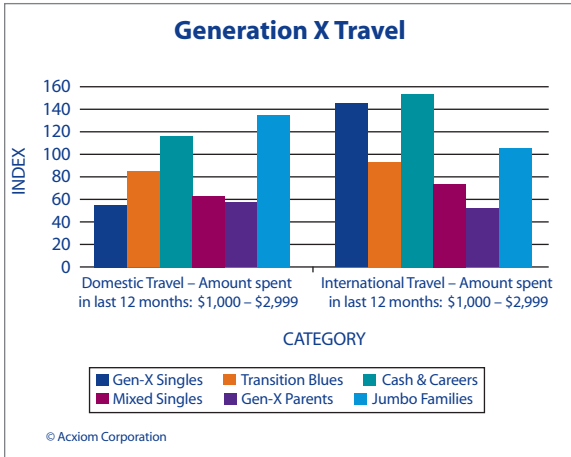

© Acxiom Corporation

11

Chart 10: Gen X spend on domestic and international travel

Similarly, the following chart reveals that individual Gen-X segments have very different domestic and international spending portraits.

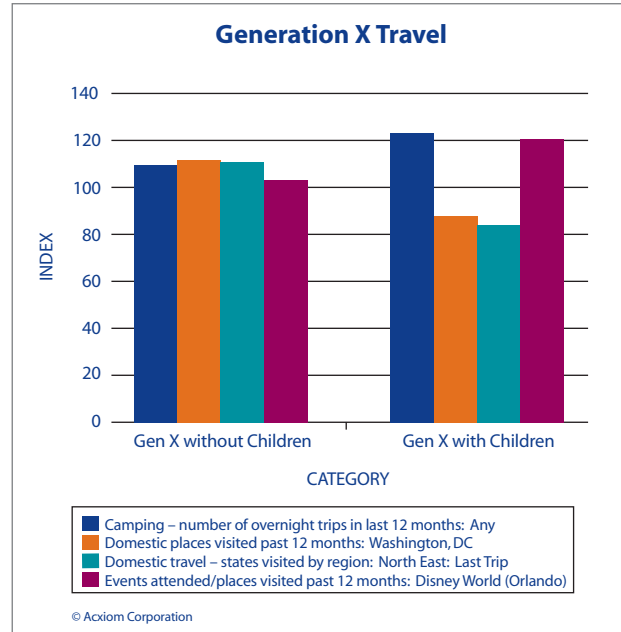**Generation X Travel**

© Acxiom Corporation

A marketing strategy to capture this market needs to fully accommodate these differences.

For example, first comes love, then comes marriage, then comes travel — with married couples representing 62% of (Gen X) travelers.[11] Married couples with young children in this generation continue to travel, often preferring outdoor activities including hiking, biking and camping. These families also look for travel that offers kids programs such as special meals, hotel discounts and supervised activities.

Chart 11: Gen X travel habits (with and without children)

The following chart illustrates differences in travel preferences between Gen Xers with children and those without children:

Generation X Travel

© Acxiom Corporation

Couples with children under 18, a large segment of Generation X, take an average of 170.1 million trips per year[12], many to the proverbial grandma's house to visit friends or relatives. People of this generation who choose not to marry opt for solo vacations rich in educational opportunities or in support of a hobby or sport.
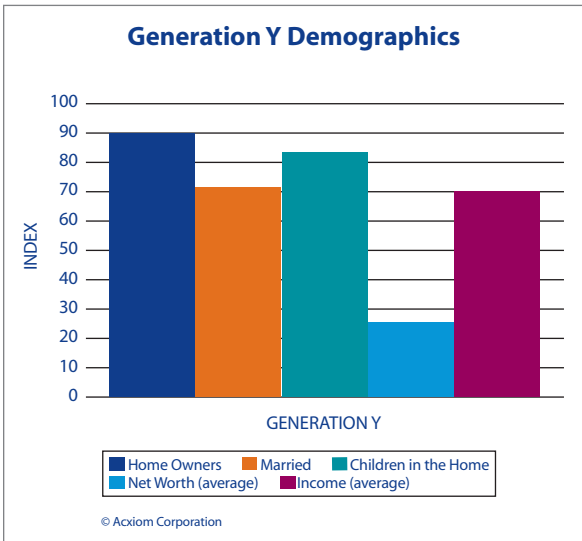
About 34.8 million U.S. adults have taken solo trips in the past three years, with males at a median age of 42 and an annual average income of $54,000 representing the most common solo travelers.[13] These travelers are most likely to consider factors such as technology availability and workout facilities when making travel decisions.

Millennials: Y way or the highway

Fiercely independent and less likely to be brand loyal, Gen Y yo-yos with their travel proclivities. Capturing the attention of these up-and-coming travelers represents a big challenge, but also the greatest opportunity for a lifetime of travel through all stages.
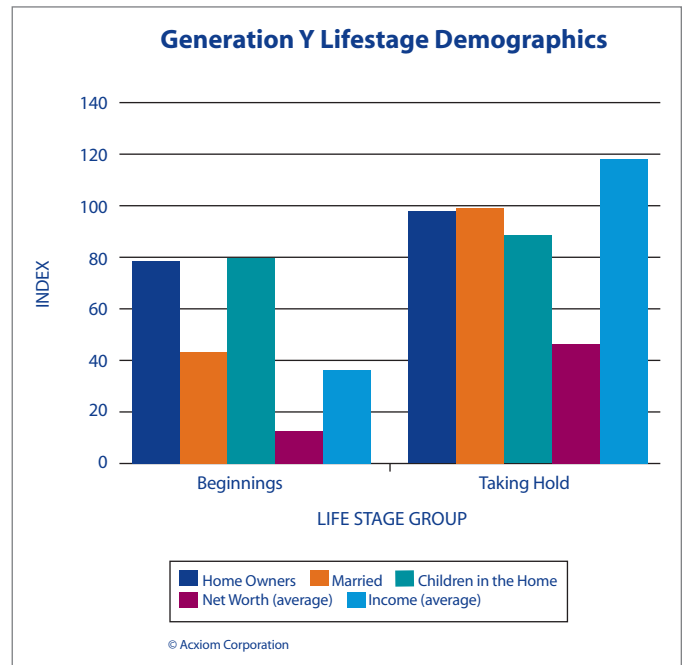
Chart 12: Gen Y demographic portrait

An aggregated Gen Y portrait reveals the following:

Generation Y Demographics

INDEX

Home Owners Married Children in the Home
Net Worth (average) Income (average)

© Acxiom Corporation

Like its Boomer and Gen X predecessors, this segment cannot be categorized as one unified cluster. This life-stage group is made up of two distinct clusters called Beginnings and Taking Hold. See *Appendix 3: Gen Y segment PersonicX groups* for more detailed descriptions of these Gen Y segments.

Chart 13: Gen Y demographics by segments

Generation Y Lifestage Demographics

INDEX

LIFE STAGE GROUP

Home Owners Married Children in the Home
Net Worth (average) Income (average)

© Acxiom Corporation

For example:

Chart 14: Gen Y visited Japan, China and Asia in past 3 years

The following chart provides a portrait for travel to Asia for the Gen Y generation:

Visited Japan, China and Far East in Past 3 Years

INDEX

Beginings   Taking Hold

GENERATION Y

© Acxiom Corporation
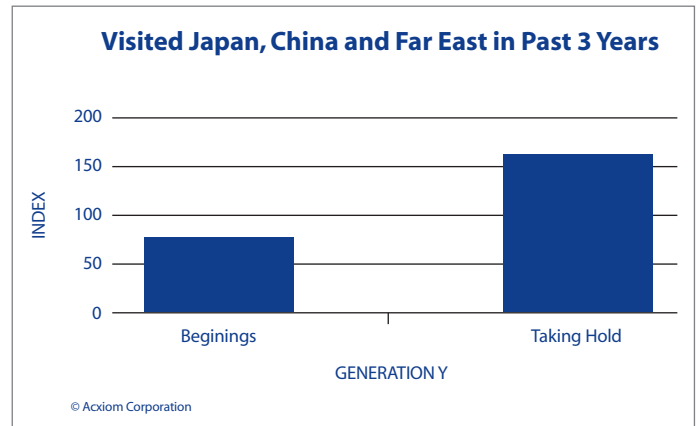
The Taking Hold segment is almost three times as likely to travel to Asia as the Beginnings segment.

Chart 15: Gen Y spend on domestic and international travel

Similarly, individual Gen Y segments have different spending habits for domestic and international travel.

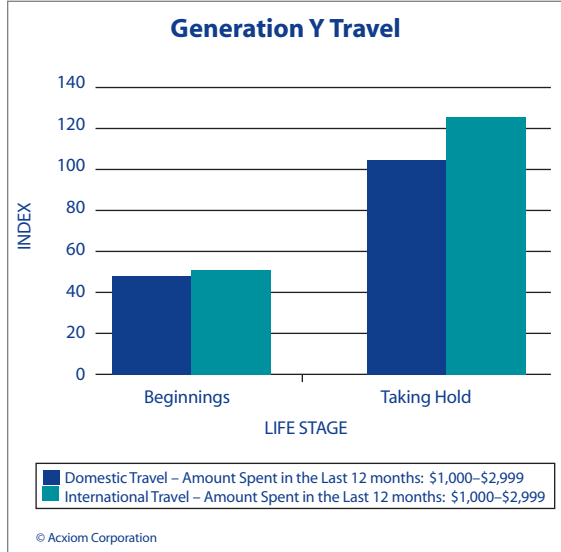**Generation Y Travel**

© Acxiom Corporation

Chart 16: Gen Y media habits

In the case of Gen Y, overall media habits for segments are similar, with the exception of mail responsiveness, as illustrated in the following chart:

Media: TV, Magazine, Radio, Internet and Mail
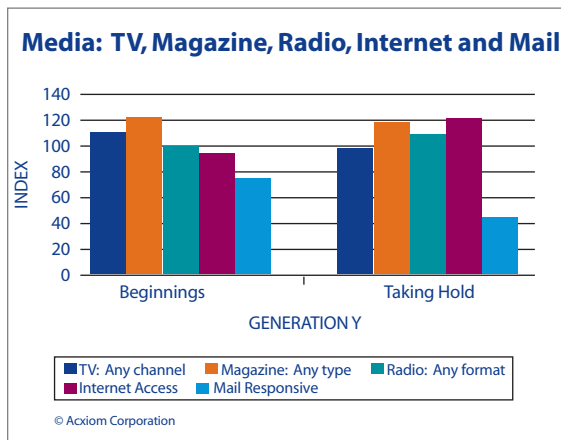

© Acxiom Corporation

Chart 17: Specific media behavior for Gen Y

The following chart compares specific media preferences for Gen Y by segment and reveals meaningful directional data about each segment's strategic value:

Media: TV, Magazine, Radio and Internet

Legend:
- TV watched past 7 days: MSNBC
- TV watched past 7 days: MTV
- Magazine: Babies
- Magazine: Newspaper Distributed
- Radio: Classical
- Radio: Rock
- Internet site visited past 30 days: MapQuest
- Internet site visited past 30 days: MSN City Guide
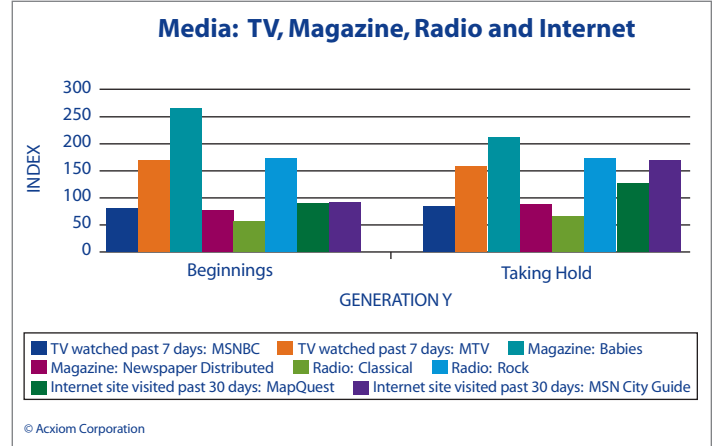
© Acxiom Corporation

Chart 18: Gen Y media behavior

While the preceding chart shows a wide variety of media options, the following charts highlight major differences that should help with media buying and messaging decisions:

Media Behavior

Legend: Magazine: Babies | Radio: Classical

© Acxiom Corporation

Media Behavior

Legend: Radio: Classical | Radio: Rock

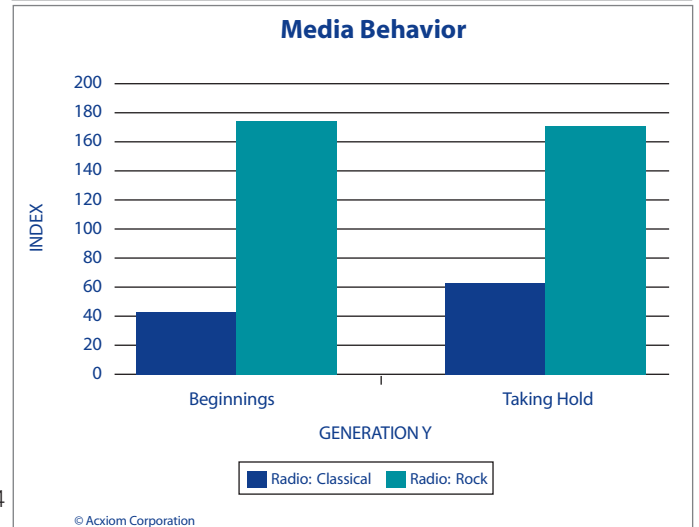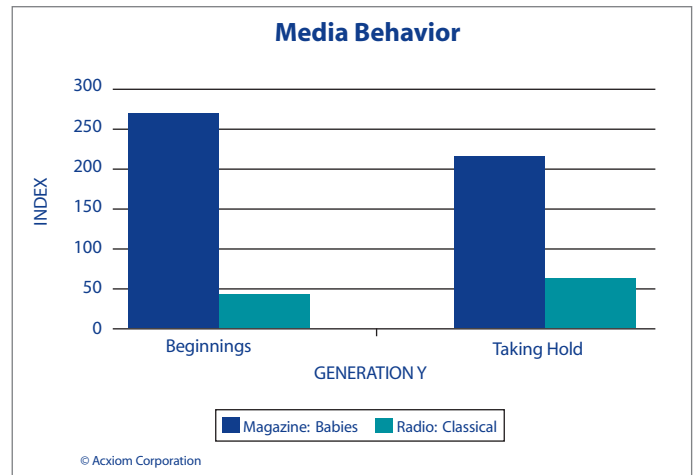© Acxiom Corporation

14

Chart 19: Shared multi-generational travel activities

Another fascinating aspect of sub-segment generational marketing is the opportunity it affords travel marketers to create overlapping marketing for multi-generational packaging and promotions.

Just beginning their journey, Gen Y often takes trips with parents or grandparents. In fact, 22% of people ages 18 to 34 took older generations with them on soft adventure travels like biking, hiking or camping.[14] The ability to bridge the gap between these generations by understanding and addressing everyone's needs may lead to increased customer loyalty among younger travelers.

Geo-Tourism

© Acxiom Corporation
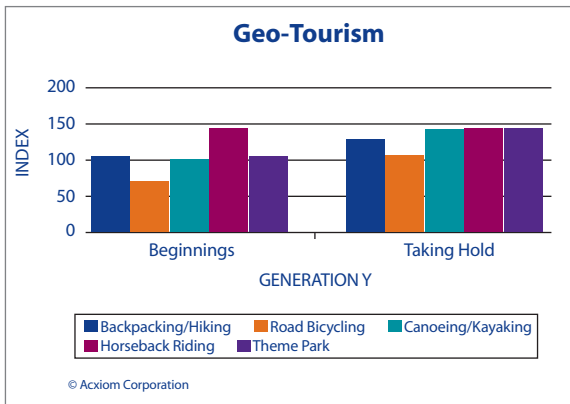
By looking for patterns in overlapping high indexing activities, travel marketers will be able to identify niche opportunities for creating packages, promotions and advertising that appeals to multiple generations of a family.

Case study: targeting honeymoon couples using PersonicX

The scenario below illustrates how the very granular generational insights revealed in this white paper can positively affect strategic and tactical marketing decisions, resulting in greater marketing effectiveness and profitability. For more information about how PersonicX can work for you, see Appendix 4.

A strategic life-stage marketing approach

Travel marketers focus worldwide on honeymoon travel as a key opportunity for customer acquisition and revenue growth. Typically, the spending level for honeymoon travel is three times the leisure trip spending average. Honeymooners represent a highly visible but elusive target.

It is difficult to capture information regarding who is getting married and — with the exception of some very specific and expensive media options like bridal magazines — difficult to reach the soon-to-be-married group in a targeted way.

By using the techniques and data discussed in this paper, it is possible for travel marketers to visibly increase their marketing effectiveness to support profitability and sales goals.

Step one: Recognize high-potential honeymoon travel prospects

By analyzing the data related to life-stage groups, travel marketers can determine which single clusters are likely to migrate into married clusters and the rate of that migration.

For example, the Taking Hold segment of Generation Y follows a migration pattern from single to married in the following way:

15
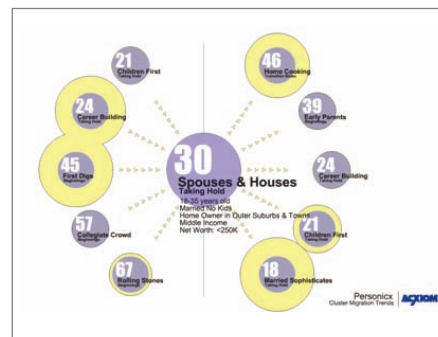
Analyzing this information reveals that the Taking Hold segment, which represents 38.6% of the Gen Y generation, provides a viable target for honeymoon travel products.

Step two: Understand travel needs and preferences and create specific products and promotions to meet those needs

Using a variety of sources allows travel marketers to acquire detailed information regarding the travel habits and preferences of the Taking Hold segment. For example, compared to other similar segments, Taking Hold demonstrates distinctly strong propensities for the following:

- Using the Internet
- Staying at upscale and mid-scale hotels, with Marriott Courtyard being the most popular
- Booking travel online
- Traveling with Southwest and American Airlines
- Visiting museums and zoos
- Buying sporting event tickets
- Cruising with Royal Caribbean Cruise Lines

Conversely, the Taking Hold segment indexes below average for the following:

- Renting cars with only 0-1 rentals a year
- Booking travel with an agent
- Gambling

What can travel marketers learn about the Taking Hold segment's travel destination preferences?

- Their favorite foreign travel destination is the Bahamas.
- Their most visited domestic city is Chicago.
- Walt Disney World, Florida is their top destination domestically.
- They travel to Asia more often than average.

Taking Hold households are much more likely to spend between $1,000 and $2,999 on both domestic and foreign travel than the Gen Y Beginnings segment. See *Chart 15: Gen Y spend on domestic and international travel* in this document for more information.
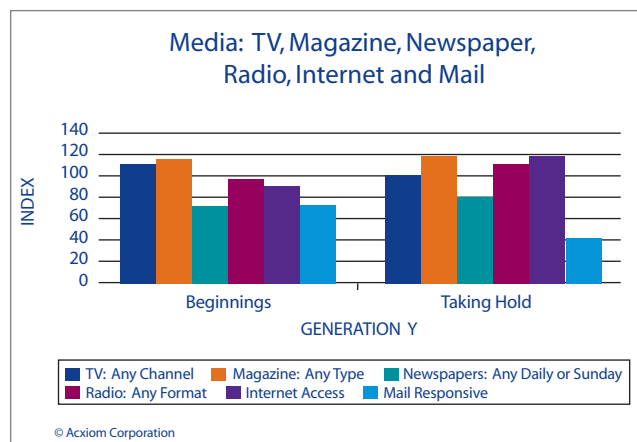
Armed with this information, a travel marketer can develop very specific honeymoon packages and offers. Destination and leisure preferences, clearly identified in relation to the target group, can be seamlessly integrated to create promotions with a significantly higher chance of success.

Step three: Identify channel and purchasing preferences

Having pinpointed the market and its travel and leisure habits, the next step is to determine how to reach the target Taking Hold segment most effectively.

As discussed previously, the Taking Hold group indexes high for Internet usage and very low for mail responsiveness. Taking Hold's second favorite media is magazines.

Chart 20: Gen Y media behavior

Media: TV, Magazine, Newspaper, Radio, Internet and Mail

Legend:
- TV: Any Channel
- Magazine: Any Type
- Newspapers: Any Daily or Sunday
- Radio: Any Format
- Internet Access
- Mail Responsive

GENERATION Y — Beginnings, Taking Hold

INDEX axis: 0, 20, 40, 60, 80, 100, 120, 140

© Acxiom Corporation

Specifically relevant to honeymoon travel targeting, Taking Hold is much more likely than the average reader to look at bridal magazines (indexing at 175 for bridal magazine readership).

Step four: Execution and implementation

The information generated during steps one and two of this process allows travel marketers to implement and execute targeted acquisition, cross-sell and up-sell programs across an integrated mix of communication channels. The goal of this step, from a marketing communications and implementation perspective, should be to develop media and communications plans highly optimized to reach this target group. Developing these plans involves two primary areas of focus:

Media channel optimization. Based on media preference information, determine which channel is best for the target group segment and implement the overall strategy including:

- E-mail/Internet marketing
- Direct mail
- Agent-lead generation
- Telemarketing
- Magazine advertising
- Newspaper advertising

Investments in the channels can be calibrated to meet the target groups' preferences.

Targeted and scored prospect list selection. Given Gen Yers' preference for Internet marketing (versus the more traditional direct mail and mass media options), targeted e-mail promotions and advertising — including e-marketing prospect lists — are essential to any marketing plan designed to capture a share of Gen Y wallets. Using life-stage segmentation codes to score prospect and customer lists enables marketers to reach exactly those segments that they are targeting online.

Step Five: Create a benchmark framework and iterative campaigns

Starting each program with a well-defined target, specific offers and a clear media and marketing plan enables marketers to create a working target list that can be used to track and recalibrate response rates, acquisition rates and determine the return on investment (ROI) on specific campaigns. An essential part of any successful plan is the ability to track and refine efforts.

The application of generational research resources and strategic targeting capabilities can result in the following:

- Better prospect recognition
- Valuable insights for product development (packages, etc.)
- More effective marketing and communications
- Higher acquisition and conversion rates
- The ability to track response and calibrate strategies for increased ROI

Marketing for life stages

So how can travel marketers take advantage of available information about each generation at each stage of life and create travel plans that extend well beyond a week to a lifetime of adventure and repeat business?

To offset increased price competition and the commoditization of travel products, travel providers can look to life-stage-based marketing to offer customized travel products and marketing strategies tailored to the consumer's specific stage in life.

Travel offers that are tailored to a consumer's life-stage-based travel needs, preferences and media behaviors provide a powerful way to differentiate competitive offerings in an increasingly crowded travel market.

By uniquely combining consumer information, life-stage segmentation, market intelligence and analysis, travel companies can create a distinct competitive advantage to acquire profitable new customers and retain loyal ones.

Understanding intergenerational differences will allow savvy travel marketers to recognize the most profitable prospects and design offers and bundle products with the highest propensity to convert consumers to loyal customers.

A successful life-stage marketing plan, described in more detail in the following sections, involves four main steps:

- Define and validate
- Assess and explore
- Implement and execute
- Follow up and refine

Define and validate

To accomplish the first step in a successful marketing plan, travel marketers must define and validate acquisition, retention, reactivation, customer share of wallet and loyalty goals. Access to customer data should be the starting point for the process of successfully defining acquisition, retention and profitability goals.

Assess and explore

After setting goals, marketers must assess and explore a wide range of data and analytic tools and choose which combinations will work for the most effective marketing strategy.

By synthesizing and segmenting current customer behavior data with robust market landscape data (household, life stage), companies can articulate exactly who the most profitable customers are by life stage, what those customers look like and how they behave. Life-stage consumer segmentation, lifestyle and value modeling, and scoring can help travel marketers create portraits of high-value customer and prospect segments; then marketers can unearth profitable, niche, untapped or emerging market segments and accelerate travel market-share growth.

The following data tools can work in concert with each other to create effective acquisition and retention programs for an array of sales channels from travel agents to Internet bookings:

- InfoBase-X Enhancement — Connects marketplace individual and household data to customer behavior data.

- Data Portrait Analysis (DPA) — a diagnostic tool used to recommend specific data elements. A DPA provides a snapshot of a company's customers compared to a given reference population on a variable-by-variable basis. A DPA can tell companies information about customers such as whether they are more likely to get married or to have children.

- Predictive and descriptive models:
  - PersonicX, Acxiom's proprietary household-level segmentation system, places U.S. households into one of 70 segments. PersonicX is unique for its understanding of the role life stages play in driving consumer purchasing behavior. Propensity models of consumer behavior are an essential component of this segmentation system.
  - Discretionary Spending Index™ (an IXI Corporation Product) — This scoring tool quantifies the size of a specific consumer's economic footprint, which has a strong relationship to travel spending capabilities and travel preferences.

Implement and execute

After selecting the most effective mix of tools, travel marketers must implement and execute targeted acquisition and retention programs across an integrated mix of communication channels.

Based on the previous steps, travel marketers can define and implement well-informed, measurable marketing programs with an emphasis on the following:

- Channel optimization. Identify which channels are best for each segment for implementation of the overall strategy.
  - Internet and e-mail
  - Traditional offline media
  - Direct mail
  - Telemarketing
  - Mobile

- Product and bundling selection. In addition to selecting the most effective channel, the information marketers gather about consumers allows them to create the best product offerings by target. For example, consumers who actively seek out online travel need incentives to actually purchase travel products they have researched.

- Targeted and scored list selection. It is important at the execution stage for marketers to utilize scored lists. Many marketers rely heavily on exclusively internal data assets. This data can provide great insights, but cannot be used to generate new customer information from external sources. Life-stage segmentation systems like PersonicX enable marketers to target and score prospect lists for program implementation, enabling marketers to focus on specific segments of their acquisition base.

- Customized communications. By monitoring key life-changing events such as marriage, the birth of a child, graduation and retirement, travel marketers can craft pre-emptive messages that speak directly to the needs of individuals at a moment in time. The power of

being in the right place at the right time with the right message means more in the travel industry than perhaps any other as people make travel decisions based primarily on the events that shape their lives.

Follow-up and refine

After your program has been implemented, an assessment of results and their implications is the next step. These results drive an iterative process designed to improve acquisition and loyalty factors strategically over time. Creating life-stage groupings for analytics allows travel marketers to set acquisition benchmarks and define next iterations to refine data, analytics and channel execution for future campaigns. The entire process is focused on converting high-potential, high-profit prospects into loyal customers.

Conclusion

More than ever before, significant trends in the travel industry include an increase in leisure travel as well as more online travel booking. There is also an increase in targeted marketing for up-selling and cross-selling through customer-selected channels such as e-mail and wireless devices. And geo-targeted mobile marketing is new to the marketplace.[15] Add to this mix — the aging and upcoming retirement of the country's largest Baby Boom generation, and you have an environment primed for travel marketing based on specific events at each stage of life.

Being able to craft and implement meaningful travel marketing strategies and deliver relevant offers to the right customers at the right time provides benefits to travel providers and consumers alike through all stages of life. It's about developing a relationship with the customer. The key benefits include:

- Increasing customer retention. By making marketing messages more meaningful and personal with each life change, marketers increase customer share of wallet and improve

retention. With each event — from a brilliant honeymoon package to a great kids program, from the adventure of a lifetime to that multi-generational reunion — travel providers add benefit for consumers while reducing acquisition and replacement costs.

- Creating lifetime value and relationships. By meeting consumer needs at each stage of life, travel providers create lifetime relationships that increase in value at each significant stage. As people age, time and money usually becomes more available. As a reward for establishing a lifetime relationship and delivering excellent service, consumers will spend that time and money by being loyal to a specific travel provider.

- Defining and targeting the most profitable market segments. Clearly-defined market segments provide marketers with invaluable data to determine which target segments represent the greatest potential profit and which segments are likely to migrate into profitability in the future.

- Attracting new customers. Finally, travel providers benefit from life-stage marketing by potentially attracting new customers with each life event. By being the first to recognize a significant life event with a relevant offer, travel providers can set themselves apart from the competition and begin new relationships with unlimited potential.

Life-stage marketing is the most valuable tool that travel marketers can utilize when defining strategies for future growth.

Key marketplace trends coupled with generational insights can be leveraged to recognize the most profitable long-term customers, develop travel options to meet their needs and communicate with customers in ways that are targeted and profitable.

As a trusted partner in your strategic marketing efforts, Acxiom can provide companies with accurate consumer data and effective tools that help make lifetime travel marketing goals a reality. PersonicX, our proprietary life-stage segmentation system, enables marketers to design travel messages to specific target consumers defined and refined at a household level. A unique offering in today's travel environment, PersonicX also provides a monthly change file that highlights significant consumer life events as they occur and helps marketers be first with relevant and personal travel messages.

By being there for the perfect honeymoon, taking the family on their first trip to Walt Disney World, searching Mayan ruins with teenagers for the meaning of an ancient culture, bringing romance back to empty nesters at the ideal spa and then reuniting families again in a multi-generational cruise of a lifetime, travel marketers can finally capture the spirit of travel and the loyalty of customers over a lifetime.

Appendix

Appendix 1: Boomer segment PersonicX groups

The following information provides details about individual segments within the Baby Boom generation.

Mixed Boomers

Group   10B   Mixed Boomers   Households: 6,071,500   (5.13% of U.S.)

Clusters   47   Rural Parents

                   53   Metro Parents

                   60   Rural Rovers

About Mixed Boomers

The three clusters of Group 10B, "Mixed Boomers," exemplify the price of divorces in America — middle-age "Boomers" who, with or without children, must manage on limited educations and incomes. Assuming a majority of the "Boomers" cohort did not marry before 30, then, per current American norms, the 10B clusters — many in their early 40s — are right on schedule. Divorced or not, they are clearly unique — two clusters are rural, one dense metro, and they all rank differently on the socio-economic scale. What do they have in common? All show predominant clerical white-collar and blue-collar occupations, with limited educations, and all skew into the Central regions.

Appendix 2: Gen X segment PersonicX groups

The following information provides details about individual segments within the Gen X generation.

Transition Blues

Group   3X   Transition Blues   Households: 2,786,100 (2.35% of U.S.)

Clusters   34   Outward Bound

                   41   Trucks & Trailers

                   46   Home Cooking

About Transition Blues

The three clusters of Group 3X,"Transition Blues," introduce the so-called "Me" or "Gen X" cohort of young adults born from 1958 to 1969. They were mostly school kids during the Vietnam War. The members of Group 3X emerged behind the "Boomers" into a job market with few jobs. They did menial work and coasted through the singles bars during their 20s. Today, in their 30s and 40s, they are finally transitioning to a more settled lifestyle, some getting married and a few starting families. These clusters show a mix of white and blue collars, all with mid-scale household incomes, below-average college educations and minimal net worth.

Appendix 3: Gen Y segment PersonicX groups

The following information provides details about individual segments within the Gen Y generation.

Beginnings

Group   1Y   Beginnings   Households: 4,676,700 (3.95% of U.S.)

Clusters   39   Early Parents

                45   First Digs

                57   Collegiate Crowd

                58   Young Workboots

                67   Rolling Stones

About Beginnings

The clusters of Group 1Y, "Beginnings," belong to the current cohort of young adults under 30, a group characterized by their concerns about security (AIDS, biological terror, drugs, amorality and economic uncertainty). This is the first generation to cite "medical insurance" as a primary employment goal. Demographically, they rank in the top 10 for short residential tenure, with low household incomes and minimal net worth. Except for clusters 39 and 58, they have few or no children. They share some behavioral tell tales, ranging from education, personal and car loans to PC and video games, no-interest checking, bar-hopping and active sports. The men prefer magazines about cars, computers and sports; the women about glamour, fashion and brides.

Appendix 4: Personifying the solution

Acxiom delivers tools to help travel marketers seize on current trends and deliver on the promise of life-stage marketing for all current and upcoming generations.

Defining customer segments

A customer segmentation tool can only be as successful as its underlying data. The foundation for PersonicX and Acxiom's life-stage segment approach is InfoBase-X household data, widely recognized as the most accurate and complete source of consumer data available in the industry today. Part of an overall customer data integration solution, Acxiom's customer segmentation can provide benefits from being able to manage large amounts of data across the enterprise to delivering focused results quickly.

With the strength of Acxiom data behind it, PersonicX segmentation further differentiates itself by building customer segments at an individual household level. Creating segments at the household level instead of at a block or group level enables the kind of targeting required to address current demands. With multiple updates per quarter, PersonicX addresses life events as they occur and keeps pace with today's dynamic consumers.

Accurate and timely

We've already established that awareness of key life events as they occur provides travel marketers with the most significant tool they can use to address the needs of target market segments and establish lifetime relationships. To meet this goal, the PersonicX Life Changes tool creates a monthly file compiled from historical analysis and the evaluation of changes in PersonicX cluster codes. Life events such as marriage, birth of a child or retirement prompt code changes and trigger additions to the file.

According to Acxiom research, 30 to 35 million migrations occur each year within household PersonicX clusters. Consumers who experience significant life changes are more prepared to accept new products and services associated with those changes. The monthly change file renews customer information and provides personal details that enable marketing to consumers as significant events in their lives occur. The marketer who gets there first with a valuable and meaningful message stands to gain not just that deal but to establish a relationship as significant life events continue to occur over time.

Mapping life-stage clusters to travel trends

PersonicX clusters provide marketers with tangible tools to help define groups within specific generations for the purposes of crafting meaningful marketing messages. Based on travel trends by generation, PersonicX clusters add value to analysis for all generations.

Greatest generation clusters include Mature Rustics, Golden Years, Active Elders and Leisure Buffs. PersonicX provides detailed characteristics about these groups including median age and breakdown percentage combined with information about preferences and family status. Marketers can use this information to determine the perfect products and services to target hobbies or multi-generational family vacations for each segment.

To meet the huge demands and capture equally great opportunities of the largest generation, PersonicX provides many Boomer clusters including Singles, Mixed, Barons, Mature Wealth and Aging Upscale. Again, characteristics such as age of children, housing preferences, financial status and historical preferences help marketers craft effective messages about socially-conscious travel or the perfect romance package to capture the attention and address the needs of the Boomer generation.

Generation X represents a range of clusters including Parents, Mixed Singles, Cash & Careers and Jumbo Families. Finding the perfect kids program for that Jumbo Family or the best gym or boutique lifestyle hotel for the Cash & Career crew sets your message apart.

Difficult to predict and even harder to make loyal, Generation Y consists of clusters like Beginnings and Taking Hold. At this stage, well-planned travel offers for adventures with parents or the perfect honeymoon can put the wheels in motion early toward a long and rewarding lifetime relationship.

Deliver a lifetime of travel options

PersonicX provides travel marketers with the customer data and tools — updated regularly to keep pace with ever-changing life events — to establish and maintain lifetime customer relationships. Well-defined PersonicX clusters combined with a one-of-a-kind monthly update file of changing customer life events provide travel marketers with the tools that they need to address travel requirements and win the business of all generations of travelers.

Appendix 5: Social computing portraits vary by age

From Forrester's April 19, 2007
Social Technographics®
Mapping Participation in Activities Forms the Foundation of a Social Strategy
by Charlene Li

Just as different generations watch different shows and read different magazines requiring marketers to have different media plans for each group, the unique Social Technographics portrait for each generation also requires varying social strategies. The following chart illustrates these social strategies:

Teenagers create more than any other generation	**Joiners dominate Gen Yers**	**Gen X Spectators form the foundation for future participation**	**Boomers and seniors need more relevant content and services to get them engaged**
Youth between 12 and 17 years old are avid users of Social Computing technologies, with more than one-third engaging as Creators. But this is a fairly self-centered age group — while very likely to create their own content, they are less likely than Gen Yers to be Critics and Collectors. And true to their social nature, nearly half of these teenagers are in social networks, while just one-third are Inactives. The key to reaching this group will be to appeal to its need for self-expression. For example, the social networking site Piczo has a large following of 13- to 15-year-old girls because new members are presented with a completely blank page — perfect for a young teenage girl, but intimidating to her older sister or mother.	While this age group has higher percentages in each category than every other age group (except for youth Creators), it's their sky-high participation in social networks that stands out. In fact, there are slightly more Joiners than Spectators — meaning that Gen Yers are less likely to passively read, watch, or listen to social media, even when it's created by their peers. So while marketers use portraits on MySpace.com and Facebook to reach this generation, successful marketers make sure that viral elements — not static links and videos — are a key feature. Nike Soccer's page on MySpace.com promotes Joga.com — a social networking site built around the World Cup last summer — which at its peak had more than 1 million worldwide members.	While significantly fewer members of Gen X are at the top of the participation ladder, that four out of 10 are already using social media as Spectators means that they are well positioned to take the next step. The foundation for future participation: Critics, who already encompass one-quarter of all online Gen Xers. This generation has plenty of knowledge to share, from rating recipes on Allrecipes to offering reviews of a new restaurant on Citysearch, and marketers should tap into this new habit to encourage first-time participants.	Don't write off older generations — many are participating, especially as Spectators. The problem to date has been the lack of relevant content — most blogs don't address interesting issues that are important to these generations. The advent of sites like Eons — which is a social networking site that incorporates blogging and targets users age 50 and older — means that Boomers and Seniors are more likely to find something that inspires greater levels of participation. Marketers eager to tap into the soon-to-retire Boomers should invest in services and technologies that make it effortless for them to be Creators, while supporting the existing Creators (e.g., YouTube's geriatric 1927) by growing the Spectator base with search engine optimization and syndication.

Travelers Use Social Computing Technologies to Learn and Dream

"Which of the following activities have you ever done or used when researching a leisure/personal trip?"

Read traveler-written reviews online	30%
Subscribe to a travel-related RSS feed	10%
Read a travel-related Web log or "blog"	9%
Watch a travel-related video podcast	5%
Participate in a travel-related social networking site	4%
Download a desktop widget	4%
Listen to a travel-related audio podcast	2%

Base: US online leisure travelers who research travel online (multiple responses accepted)
Source: Forrester's NACTAS Q4 2006 Healthcare, Travel, And Customer Experience Online Survey

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[16] The mobile Internet is finally catching on: 31% of U.S. travelers who own a wireless-enabled device (such as a Web-enabled cell phone, smartphone or BlackBerry) used it for text messaging, e-mail, the Internet or other wireless data service in 2006, up from 24% in 2005 — and adoption rates are much higher among younger travelers and growing consumer appetites for bundled or package travel and lifestyle branding. E-Marketer

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See how Acxiom can work for you.
For more information, visit our website at
www.acxiom.com or call:

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