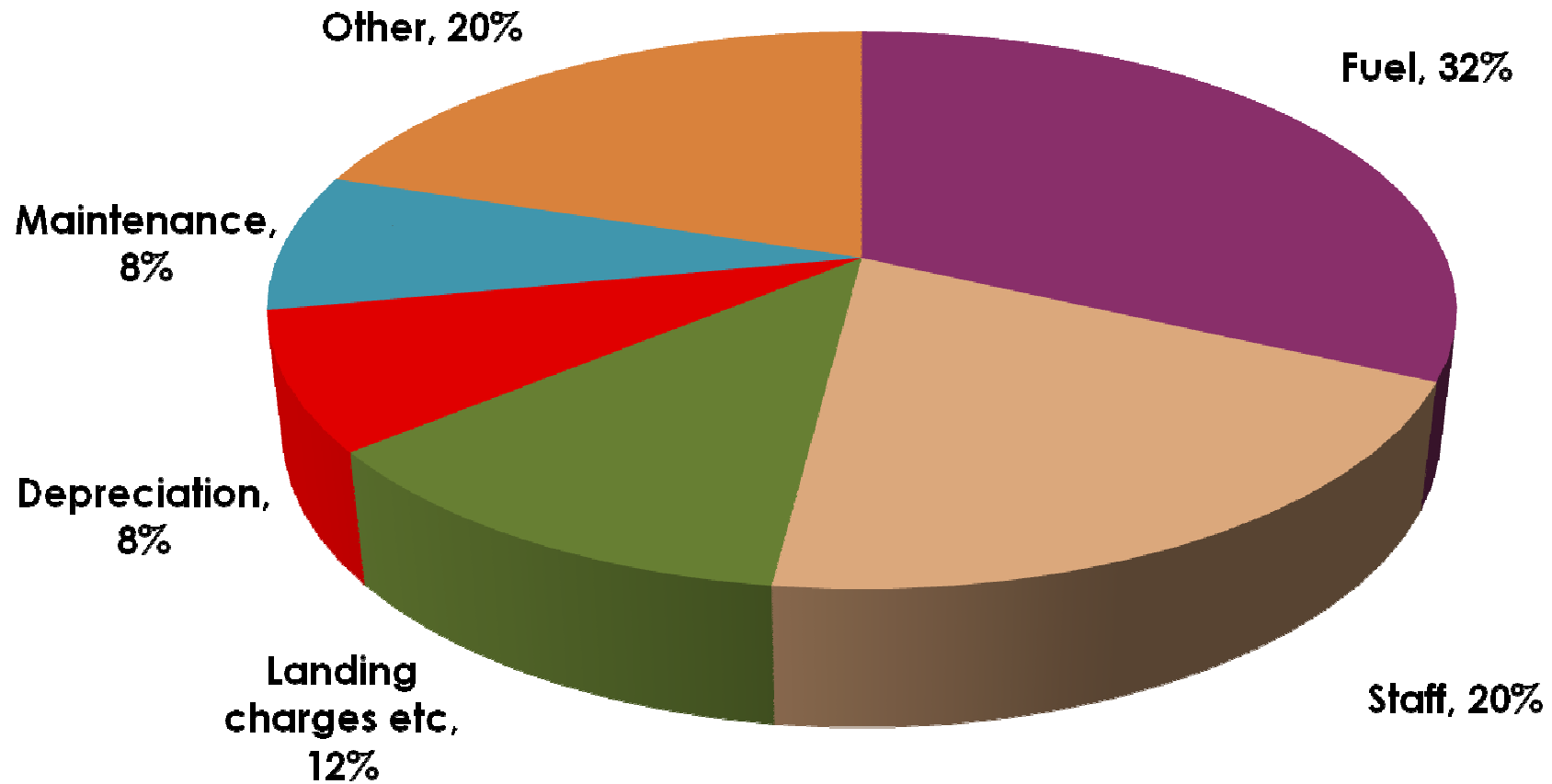




A presentation to ITB Berlin Convention
March 2010

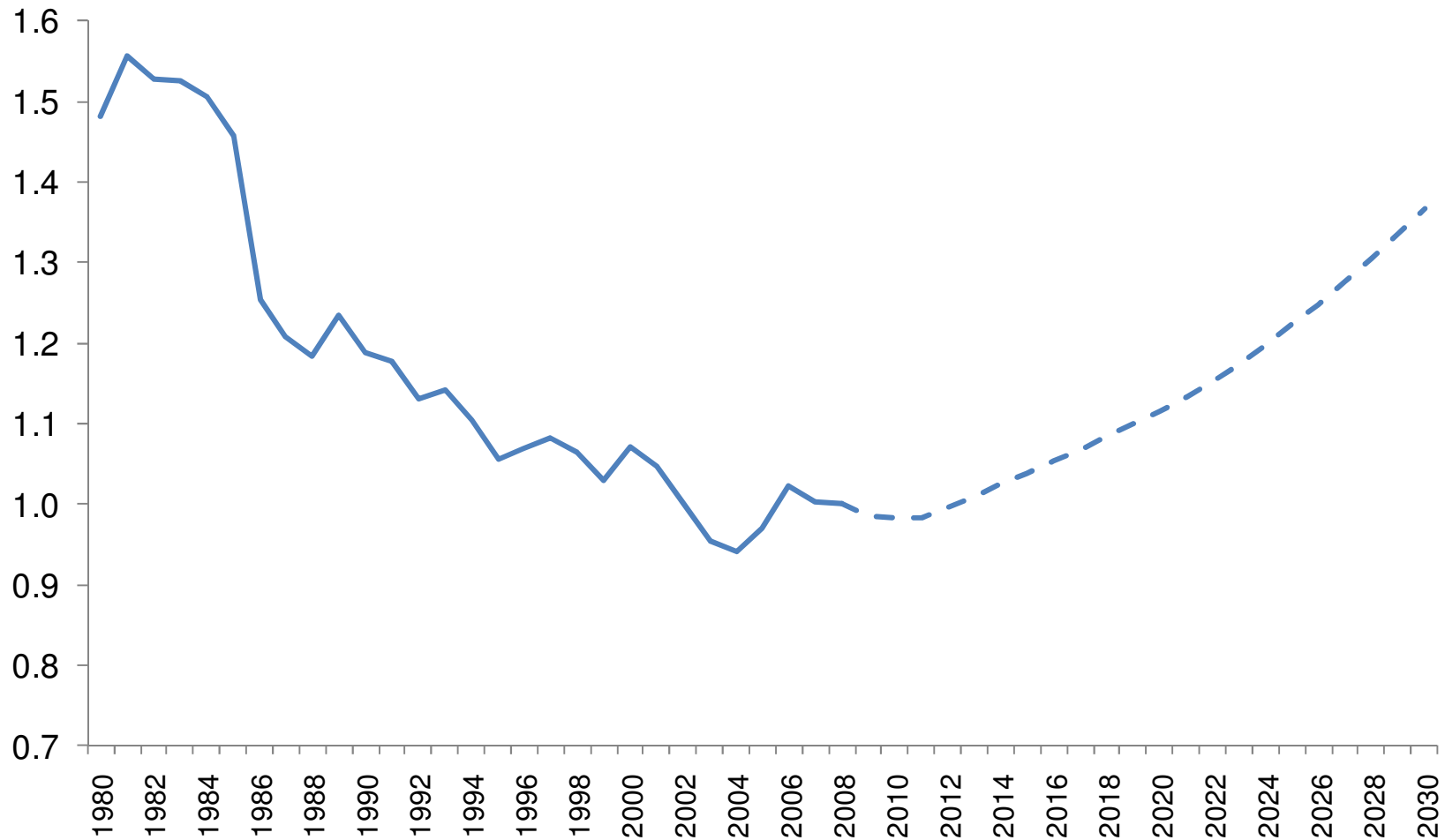
trajectory
the futures partnership

Components in the price of the 'average' air ticket - Based on Airbus data



The real cost of travel

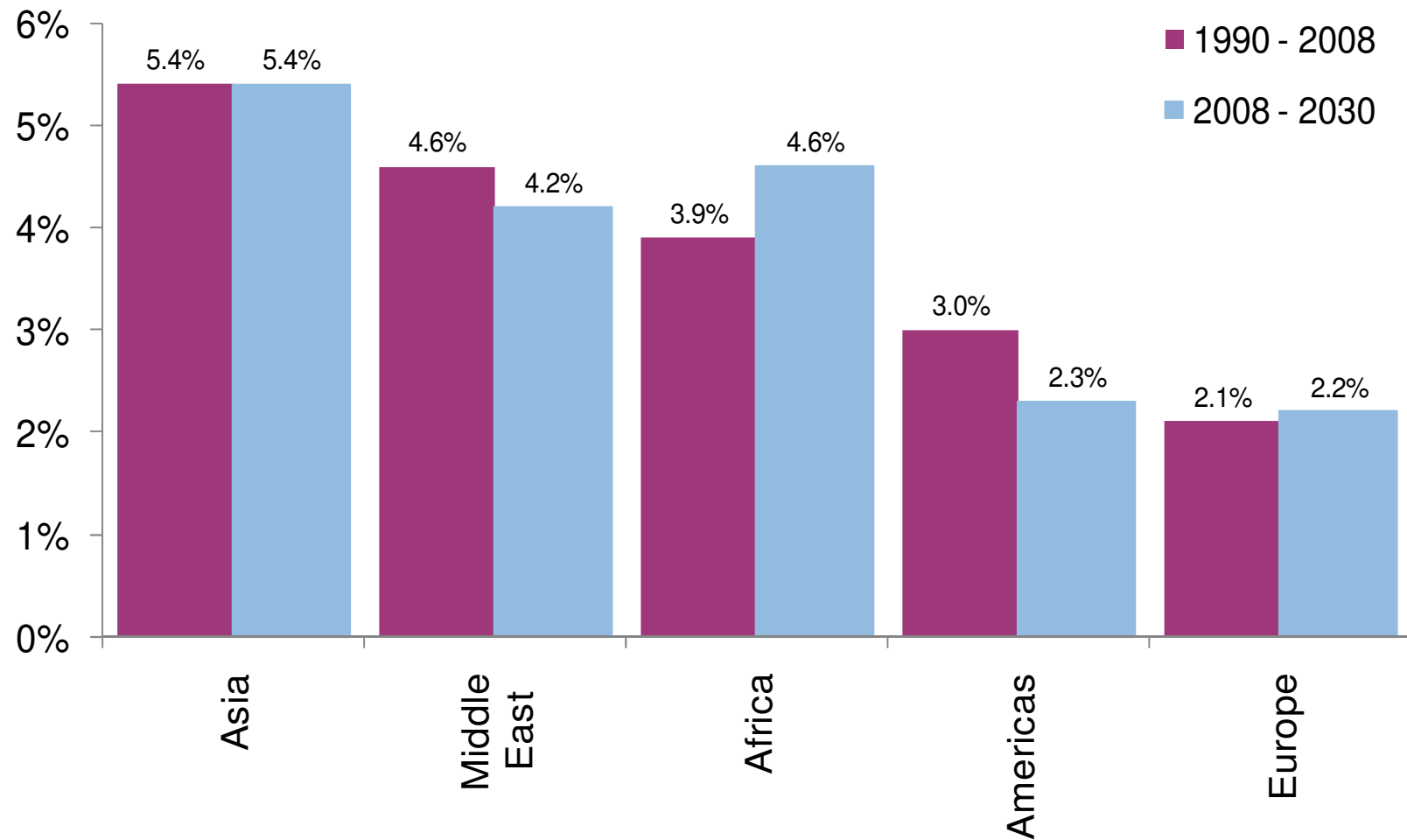
2008 = 1



Source : Trajectory

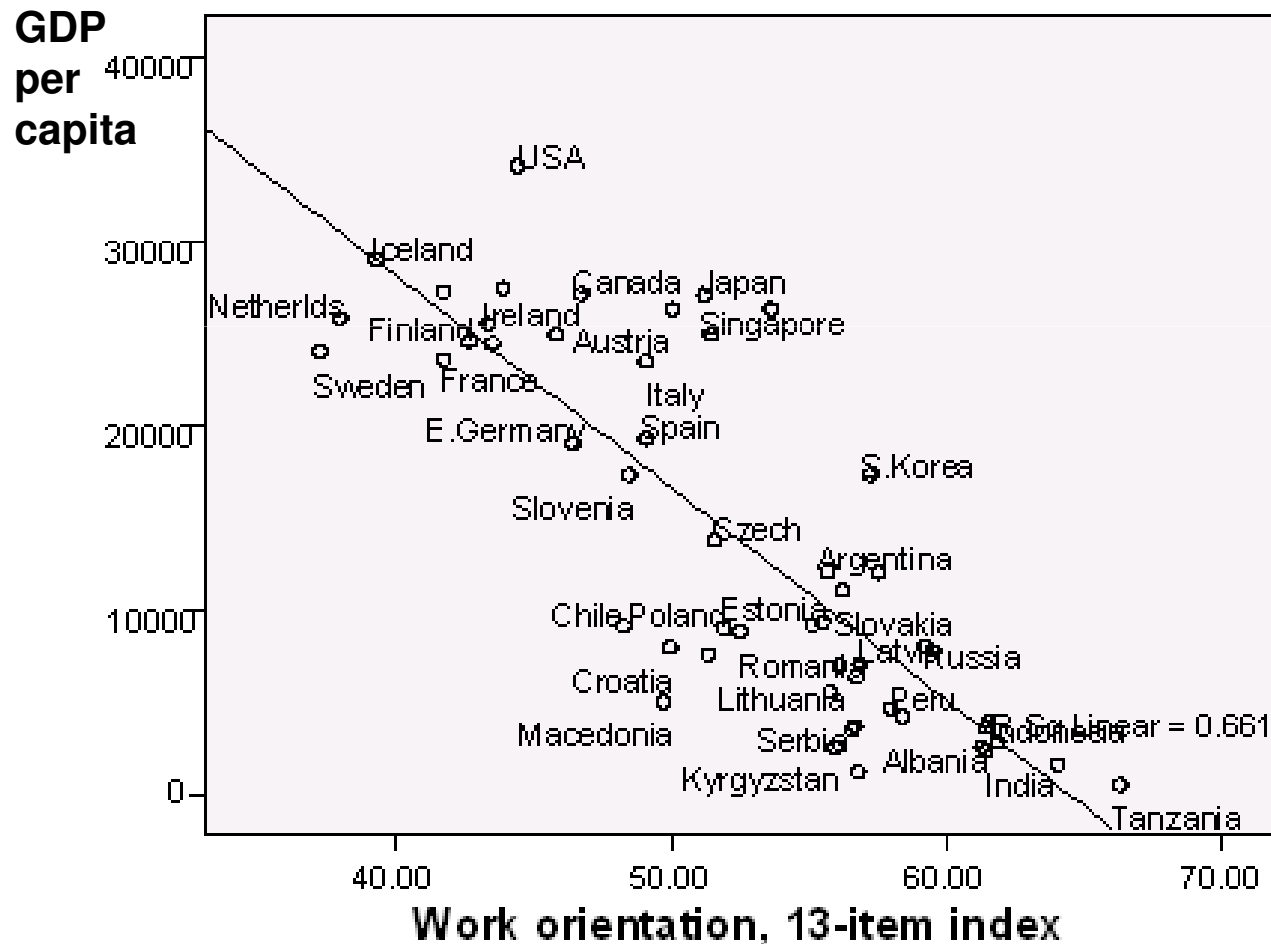
GDP growth by region : 1990 – 2030

(%pa)



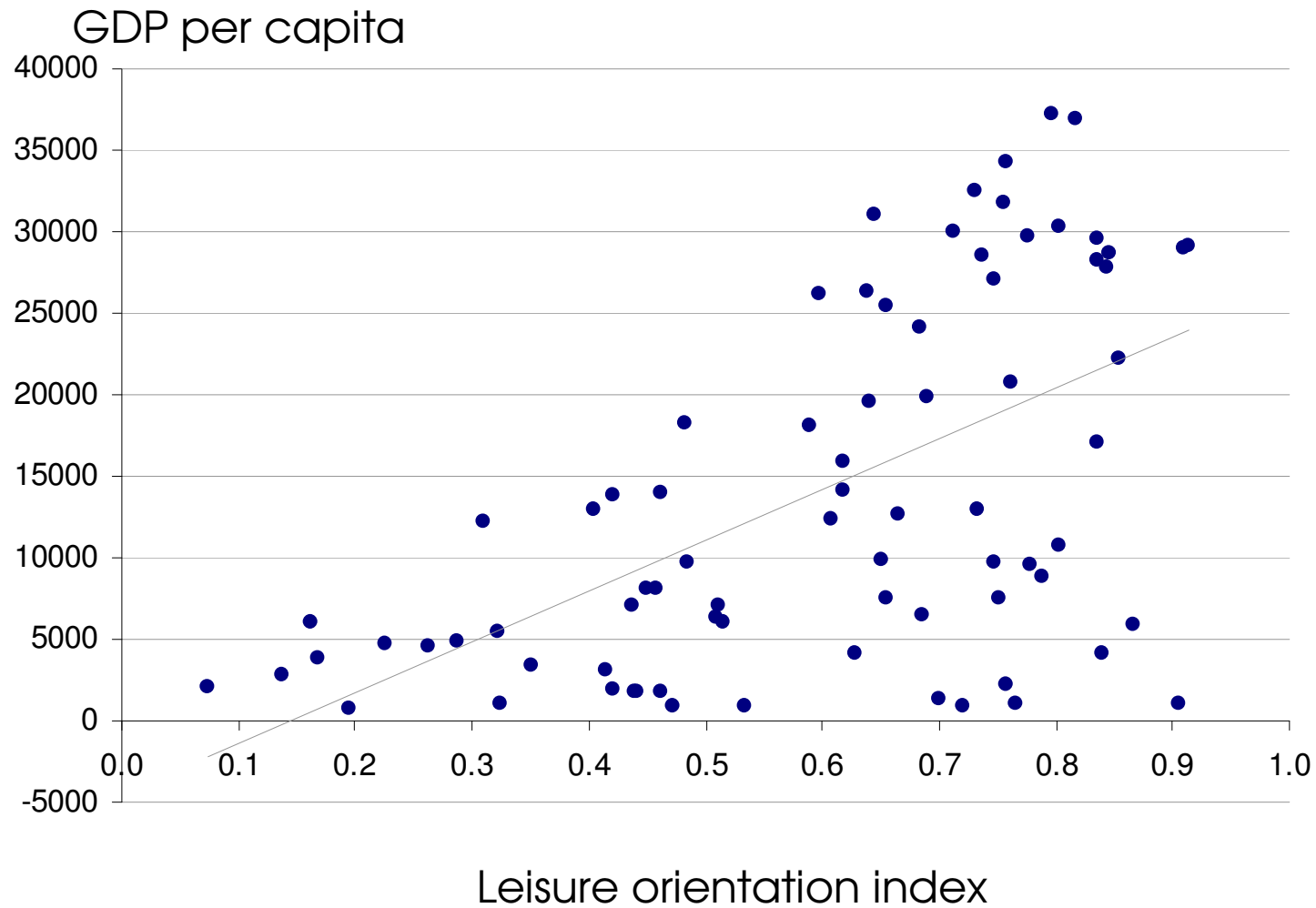
Source : IMF and Oxford Economics

Economic growth reduces the importance of work



Source: World Values Survey 2005

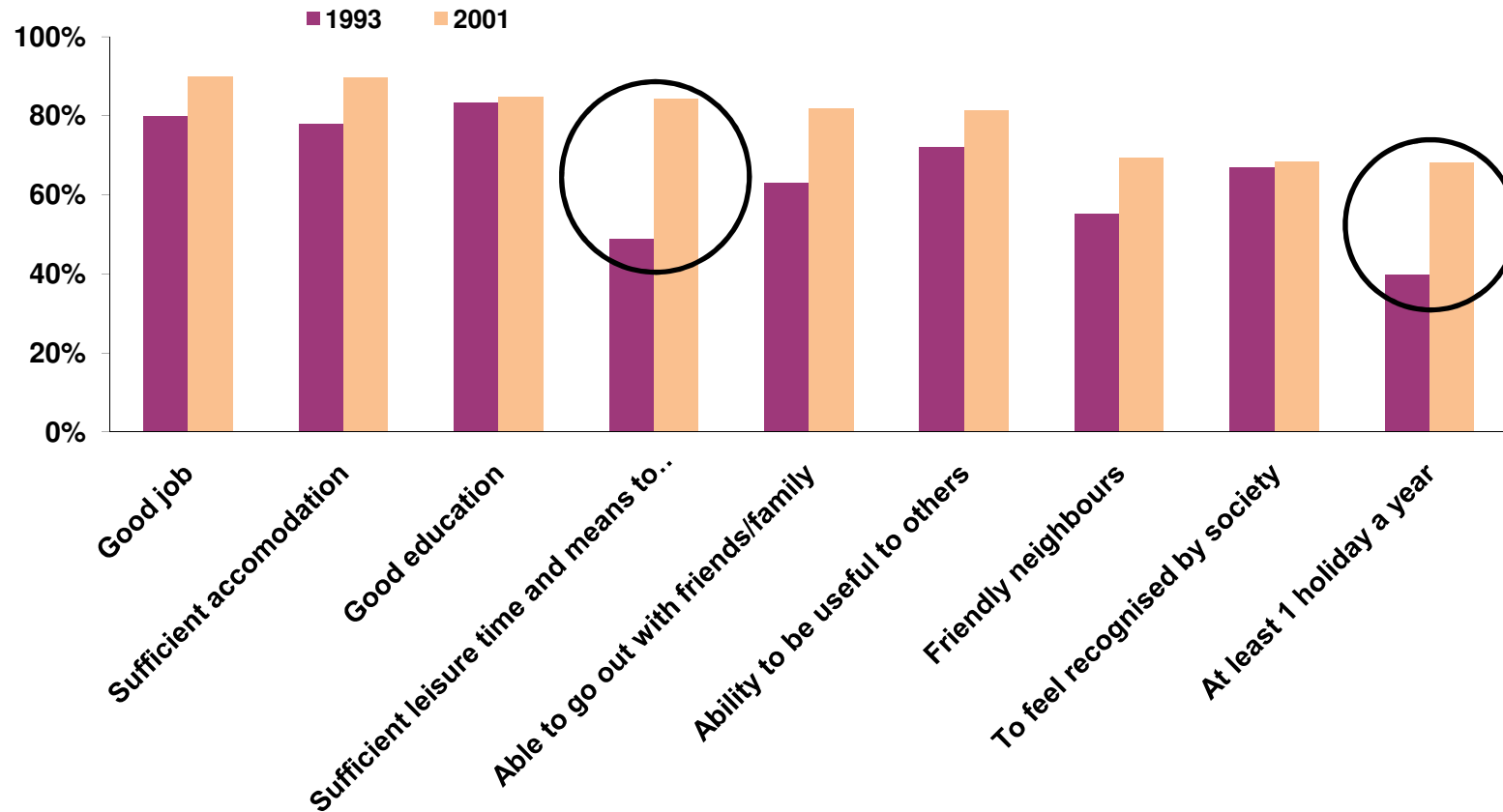
Importance of leisure by income



Source: World Values Survey 2005

Consumers had more aspirations...

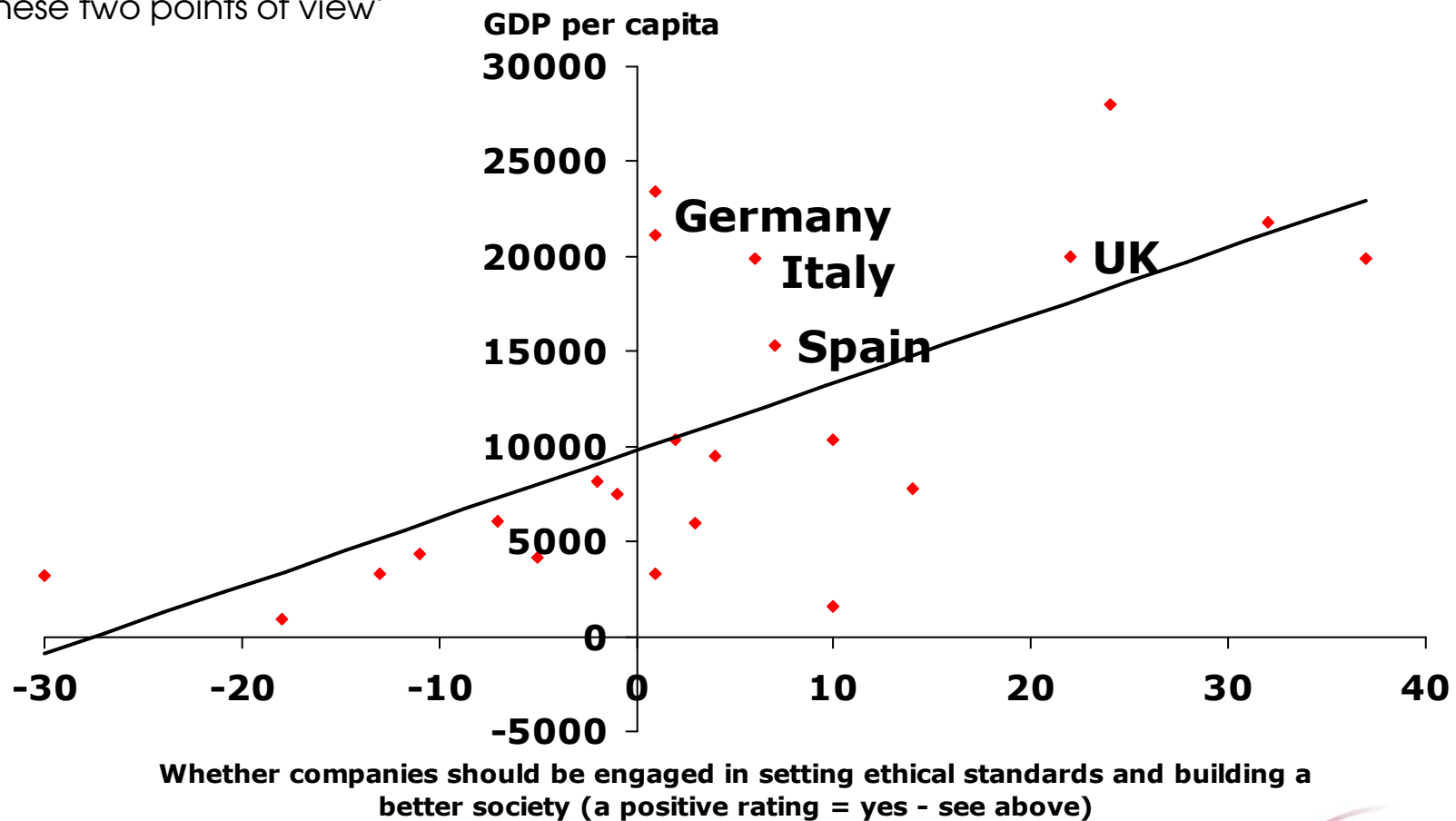
% saying selected lifestyle factors are absolutely necessary to live properly



Source: Eurobarometer
Base: 16,000 aged 15+, 2001

Relationship between the demands made of companies and GDP

Respondents were asked to define a company's role: a) 'Focus on making a profit, paying taxes and providing employment in ways that obey all laws' or b) 'Do all this in ways that set higher ethical standards, going beyond what is required by law, and actively helping to build a better society for all' or c) 'operate somewhere between these two points of view'



Source: Environics

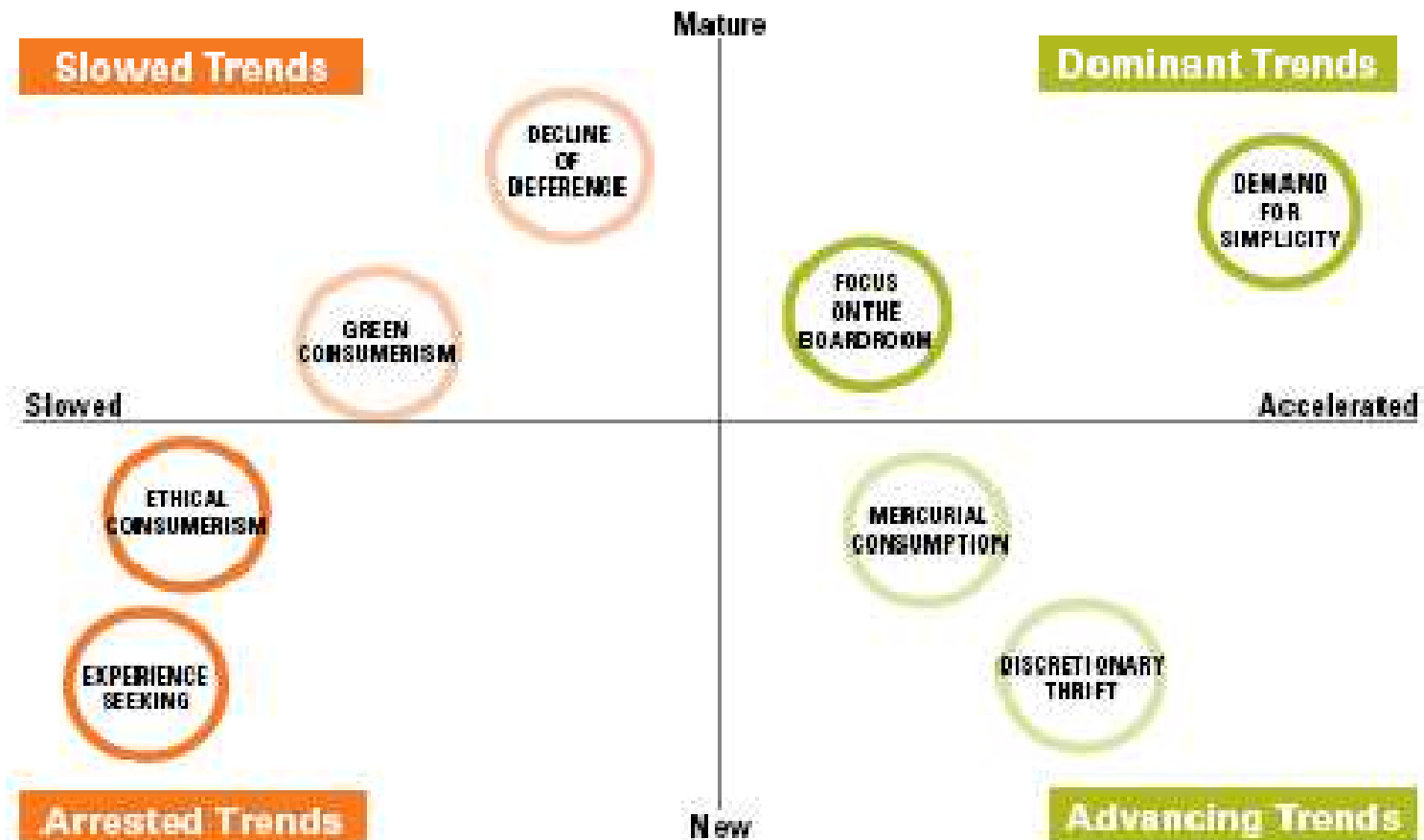
The experience economy

“Today consumers increasingly desire neither goods nor services, but sensation-filled experiences that engage them in a personal and memorable way.”

James H. Gilmore

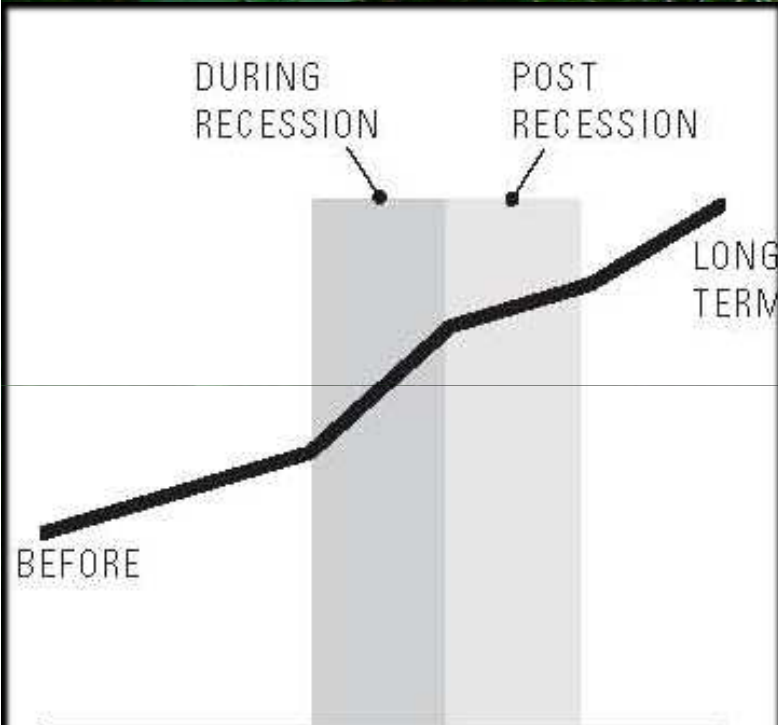


Trends and Trajectories



Source: 'The post-recession consumer',
P Flatters & M Willmott, Harvard Business Review, July-August 2009

KEEP IT SIMPLE



DEMAND FOR SIMPLICITY

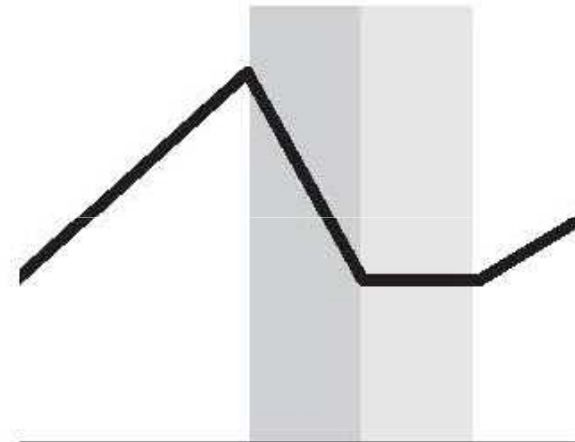
Consumers are seeking uncomplicated, user-friendly products and services that simplify their lives.



Discretionary thrift



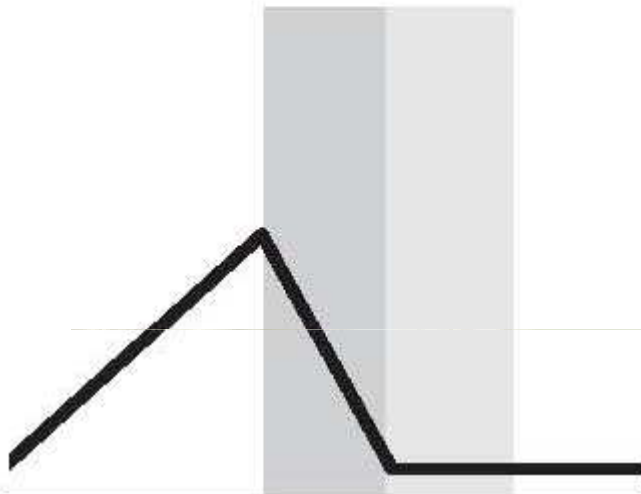
ETHICAL CONSUMERISM



ETHICAL CONSUMERISM

Altruistic consumption and spending, such as eating cage-free eggs and giving to charity, are falling as people focus on their own dire situations.

EXPERIENCE SEEKING



EXTREME-EXPERIENCE SEEKING

Expensive, frivolous, or risky recreational experiences, popular during the boom preceding the recession, have fallen out of favor.





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