



YPBR | *Yankelovich Partners*

Staying Power....



YPBR | *Yankelovich Partners*

The Power Of Insight....



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Insight # 1

- *Demand for leisure travel services will exceed that for business travel services*
-

Attitudes Toward Business Travel

Agree:

2004

New airport security measures make
business travel a big hassle

37% ?

I am actively seeking ways to use
new technology in order to reduce
my business travel in the future

35%

Get Live



Even better collaboration? Introducing new and improved Microsoft Office Live Meeting, a new standard in web conferencing.

GET LIVE
FREE 15 DAY TRIAL!

Sign up today for a
15 day free trial

Daily Demo >>

Quick Demo >>

Order Microsoft Office Live Meeting

**** [First Ever Live Meeting Practice Room!](#) ****

Be among the first to participate in a Live Meeting Practice Room — a first for us too! In it, you'll get hands-on experience of Live Meeting. No registration, sign up or obligation. Two days only. [Click here](#) to learn more.

■ [free web seminars](#)

- [Rants with Tom Peters](#)
November 10th, 2003

■ [Live Meeting news](#)

Microsoft Goes Live With Microsoft Office Live Meeting: Web Conferencing Service From the New Microsoft Office System
[view pr...](#)

Business People Liken Stress of Travel to Trip to Dentist, According to New Survey Released by Microsoft
[view pr...](#)

■ [training sessions](#)

- [Getting Started with Microsoft Office Live Meeting](#)

Recommended for customers interested in learning the basics of Microsoft Office Live Meeting, followed by a detailed "how to" walk-through of the key features and core functionality you need to start using today!

■ [customers](#)

American Express
Cisco Systems
Hewlett-Packard
Honeywell

■ [partners](#)

BT
Saba
Premiere
Conferencing
Encounter
Collaborative

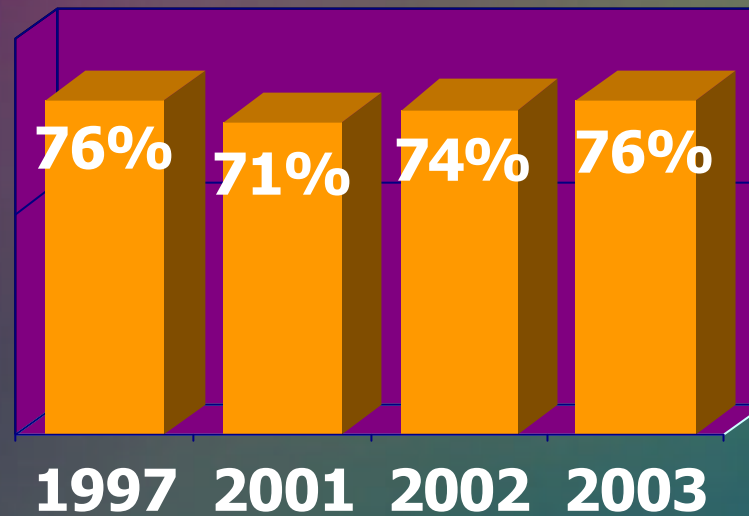
PlaceWare, Inc. is now a wholly owned subsidiary of Microsoft Corporation



Insight # 2

- *Technology will enable guests to personalize their lodging accommodations/experiences*
-

Agree: People should be free to look, dress and live the way they want whether others like it or not.



Breaking News



- Internet no longer viewed as the “perfect resource,” just very functional
 - 68% have difficulty finding what they are looking for
 - 76% find the amount of advertising a nuisance
- But 38% of users willing to pay 20% more for customized products and services

1-800-963-4816

shopping bag

my account

my model

search with an item number or keyword

 go

In All Products

order from a catalog

Catalog Quick Order

click here

Sign up!

- [Subscribe to our e-mail newsletter](#)
- [Request or Cancel our Catalog](#)
- [Join our Affiliate program](#)

Special Services

- [Gift Cards](#)
- [Check a Gift Card Balance](#)
- [Track your Order status](#)

International Sites

- [Shop in your local language](#)

Our Company

- [General Information](#)
- [Policies](#)

Navigation Help

- [Store Index](#)
- [Site Map](#)

Back-to-School Headquarters 2004: Nearly 100 new styles built to pass any test.



Looked at the calendar lately? The big yellow bus is just days away! Not to worry, though.

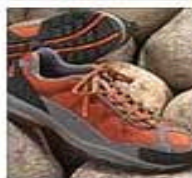
You can get all of your back-to-school outfitting done right here with nearly 100 fun, [new styles for Girls](#), [Little Girls](#), [Boys](#) and [Little Boys](#). And check out our impressive assortment of [award-winning Backpacks](#), or see our [Backpack Comparison Guide](#) to help you choose the right bag for your young scholar.



Free \$5 Gift Cards on select styles!

Earn \$5 per item when you buy select styles for: [Women](#) | [Men](#) | [Girls](#) | [Boys](#)

New! Exo Lace-ups



New [Exo Lace-ups for Men](#) and [Women](#) have an ingenious "exoskeleton" for flexible support. Plus, see all new **shoes for fall:**

- [Men](#) • [Women](#)
- [Girls](#) • [Boys](#)

New Fall Arrivals



The [Women's Drifter V-neck](#) is just one of dozens of new pieces and updated classics for fall. See them all:

- [Women](#) • [Men](#)
- [Girls](#) • [Boys](#)

Swimwear HQ



It's fall at the mall but we offer great-fitting swimwear all year 'round. See all of our Kindest Cut® swimsuits at [Women's Swimwear Headquarters™](#).

Save on Polos!



Buy any three of our most popular [Polos for Men](#) and [Women](#) and save \$2 each. (Includes new **Performance Mesh Polos** for [Men](#) and [Women!](#))

A Good Read

Enjoy amusing stories, timely product news and more when you subscribe to our e-mail newsletter.

 go

New!

See our instant outfits and buy complete fall looks for [Women, Girls and Boys.](#)



Lands' End Custom™ Clothing

» [Men's](#), [Women's](#)

Classic Fall Collection

Add an official logo of your favorite university or team

» [Alumni](#), [MLB®](#)

For Her

- » [Maternity](#)
- » [Women's Plus](#)
- » [Swim HQ](#)
- » [Swim Finder](#) - helps zero in on the swimwear that will fit and flatter YOU!



Imagine the "Glossibilities"!

Introducing Elixir Custom Gloss.

BEGIN



color

BEGIN



skincare

BEGIN



haircare

BEGIN



fragrance

BEGIN



gifts

BEGIN

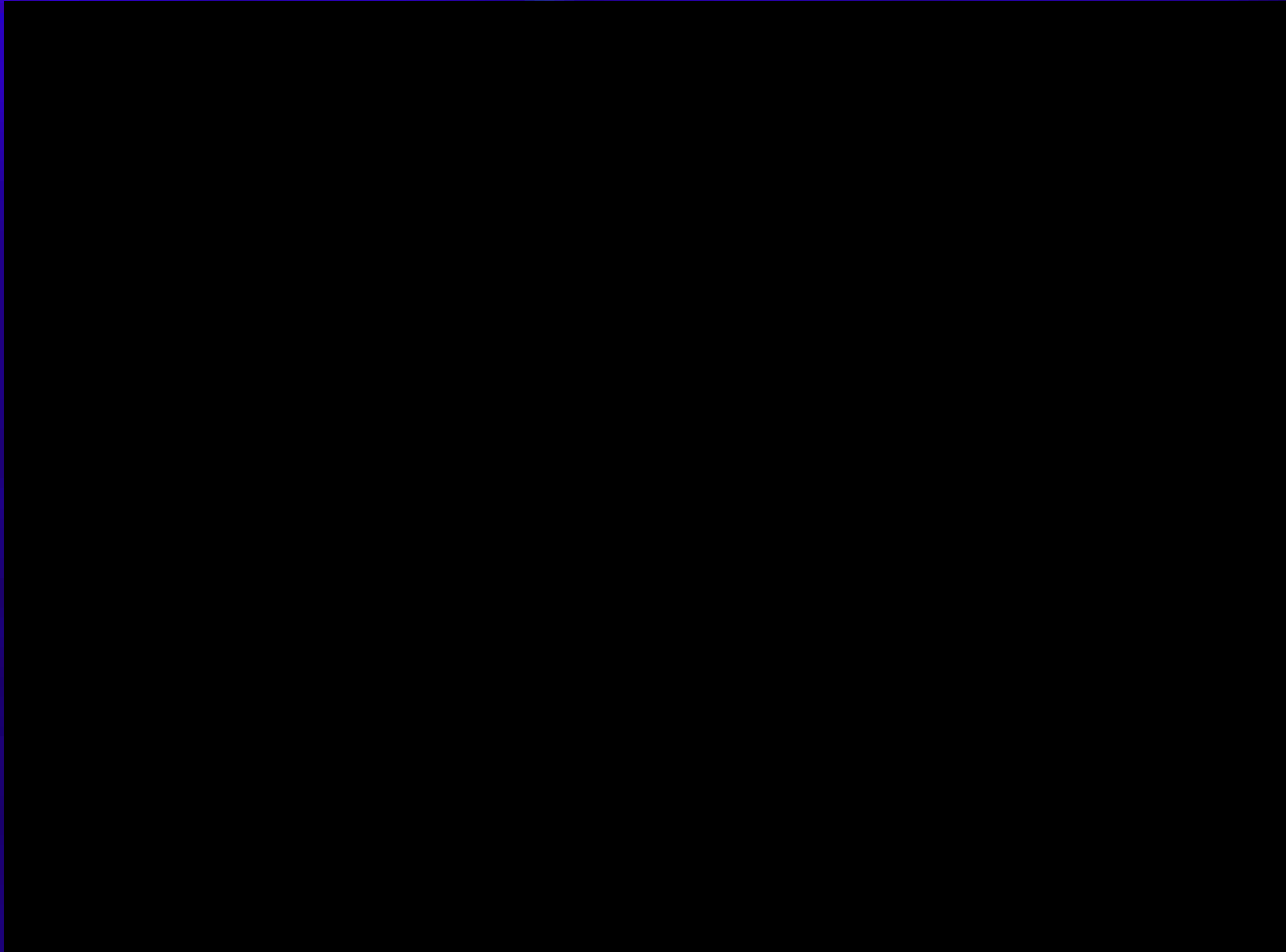
- [New Lipgloss](#)
- [New Shades Lipsheers](#)
- [Liquid Foundation](#)
- [Creme-to-Powder Foundation](#)
- [Powder Foundation](#)
- [Concealer](#)
- [Blush](#)
- [Powder](#)
- [Gold Shimmer Powder](#)
- [Dark Shimmer Powder](#)
- [Gotta Glow Powder](#)

- [New Spa Facial Treatment Solutions](#)
- [New LipLuxe Treatment Creme](#)
- [Facecare Solution](#)
- [Bodycare Solution](#)
- [Facial Moisturizer](#)
- [Facial Cleanser](#)
- [Facial Cleansing Cloths](#)
- [Facial Balancer](#)
- [LipLuxe Plump Therapy Stick](#)

- [Total Hair Solutions Shampoo](#)
- [Conditioner](#)
- [Clarifying Shampoo](#)
- [Leave-in Spray](#)
- [Conditioner](#)
- [Glisten Drops](#)
- [Heat Protectant Spray](#)
- [Sculpting Spray](#)
- [Amplifying Hair Spray](#)
- [Frizz Control Lotion](#)

- [Signature Fragrance](#)
- [Fragrance Sample Set](#)
- [Signature Fragrance as a Gift](#)
- [Fragrance Sample Set as a Gift](#)
- [I Received a Fragrance Gift](#)
- [My Perfumery](#)

- [Personalized Spa Gift Set](#)
- [Personalized Glamour Gift Set](#)
- [Personalized Travel Gift Set](#)
- [Signature Fragrance as a Gift](#)
- [Fragrance Sample Set as a Gift](#)
- [Gift Certificate Via Email \\$10-\\$250](#)
- [Gift Certificate Via U.S. Mail \\$100](#)



A glowing lightbulb is centered in the image, emitting a bright blue light that illuminates the surrounding area. The background is a dark blue gradient that fades from the lightbulb's glow. The text "The Hotel, My Hotel..." is overlaid on the lightbulb in a bold, yellow font with a black outline.

The Hotel, My Hotel...

Insight # 3

- *The most “valuable” currency will be denominated in minutes and hours, not Dollars, Euros or Pesos*
-

Agree: Life has become too complicated.



54%
1994

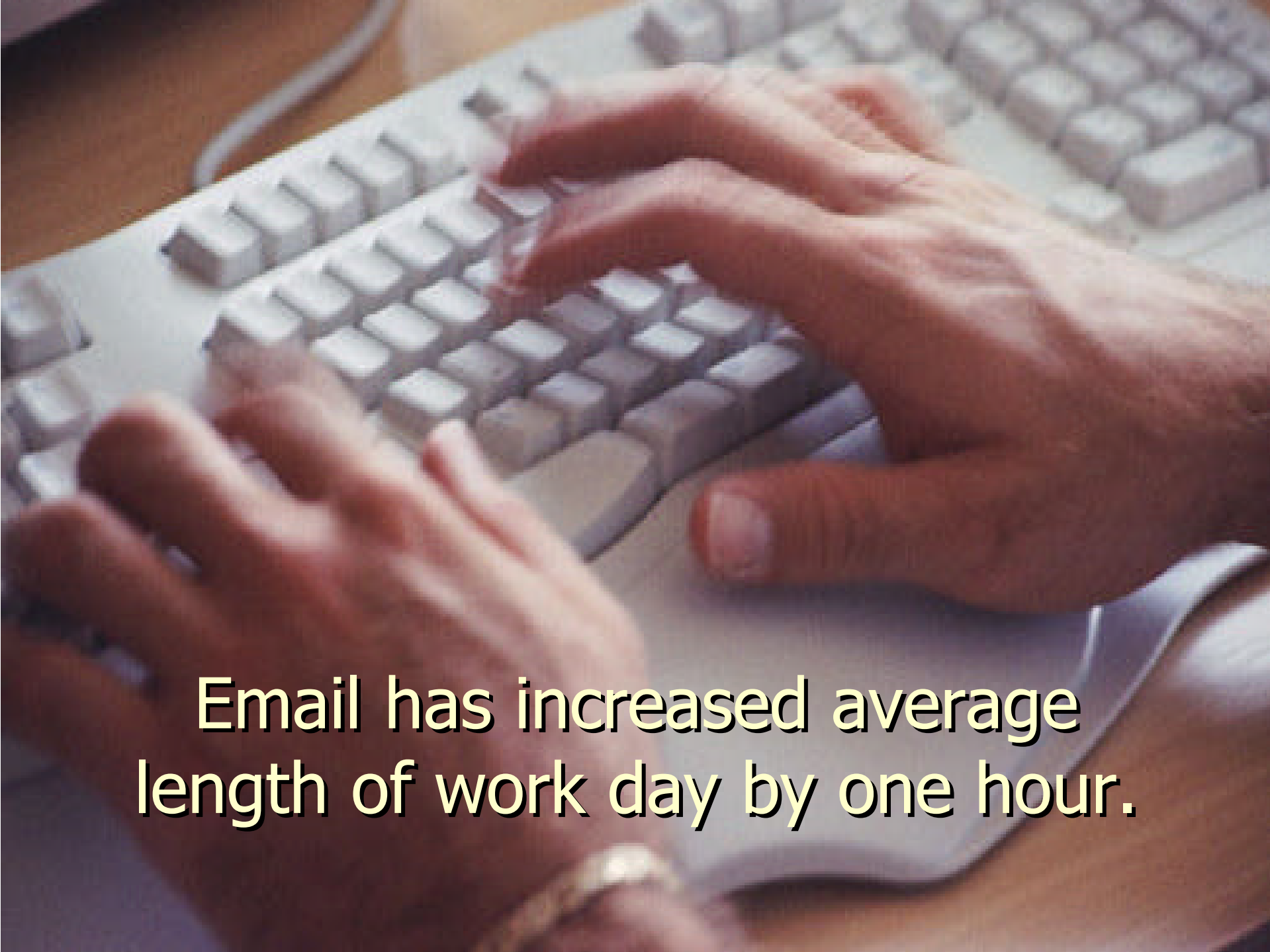
63%
2004



Time Poverty

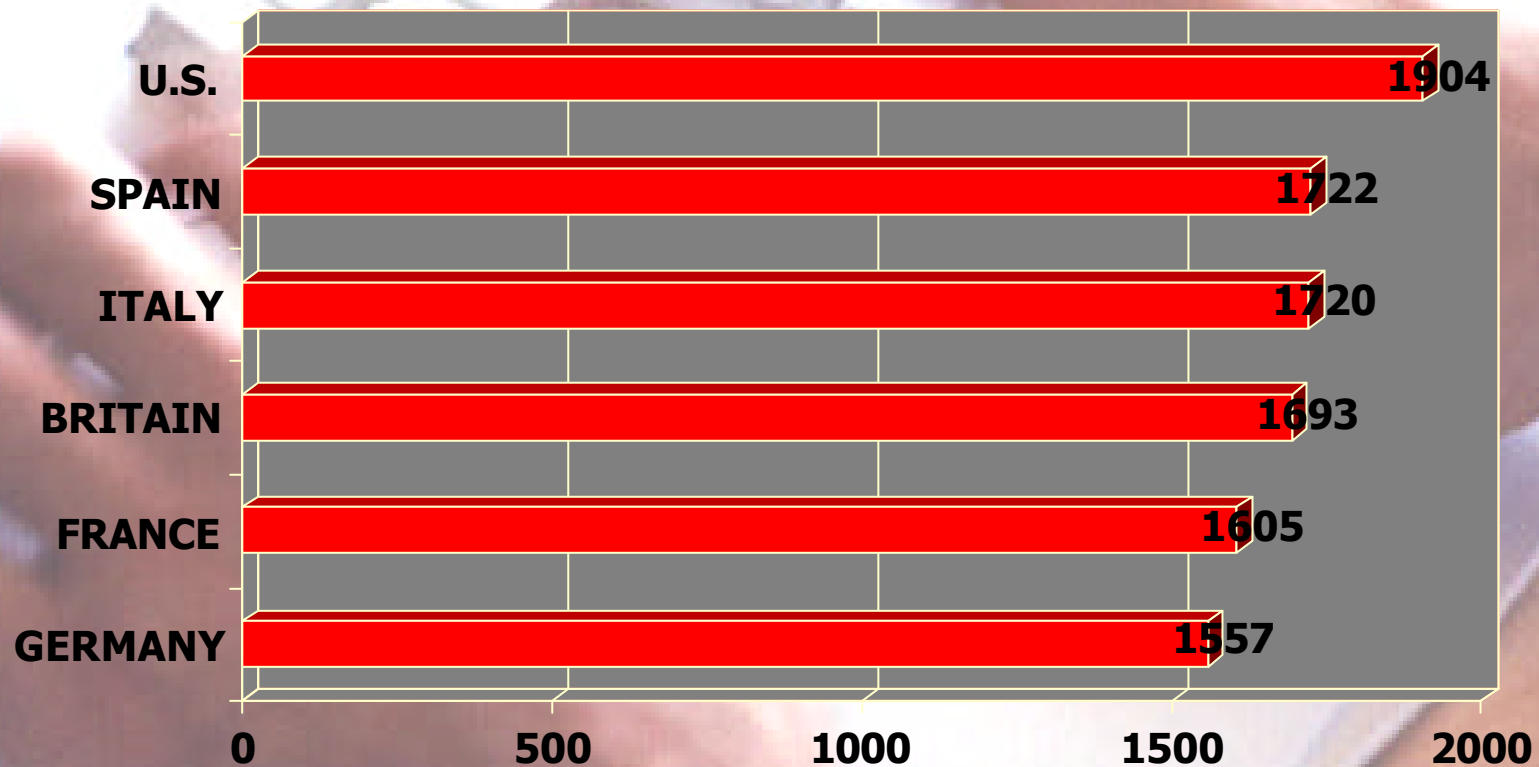
Agree: I feel like I don't have enough time.

41%



Email has increased average length of work day by one hour.

Average Hours Worked/Year (2000)



Source: Organization For Economic Cooperation and Development, 2004

Length Of Vacations

Extended (5+)

19%

Weekday (<4)

22%

Weekends (<4, Saturday stay)

59% ?



“Share Of Clock”



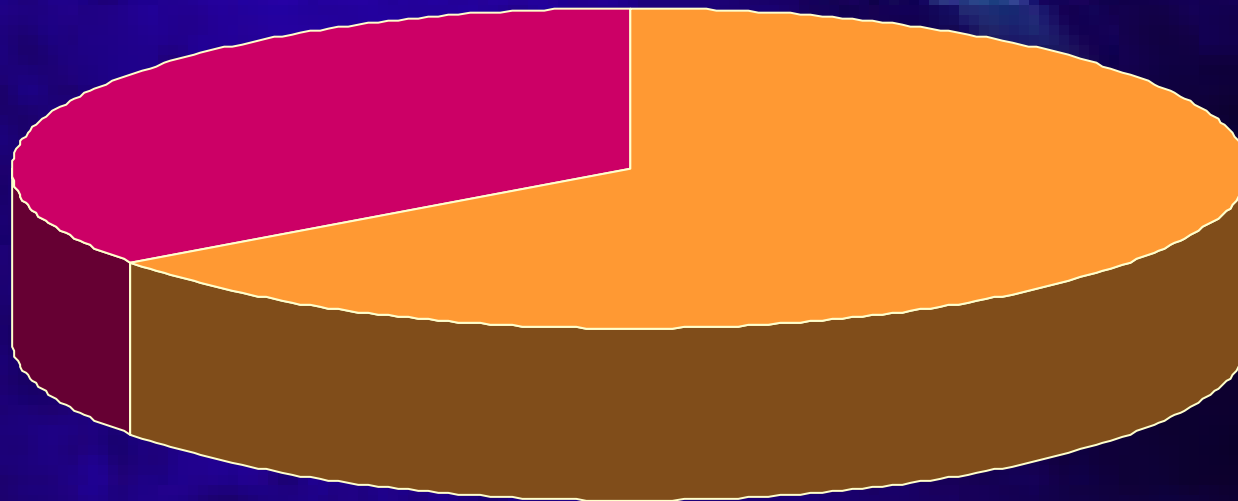
Insight # 4

- *More consumers will seek alternatives to conventional lodging accommodations*
-

Been There, Done That

I WOULD WELCOME MORE NOVELTY AND
CHANGE IN MY LIFE

AGREE
65%



Cruising

(Next Two Years)



Interested:

2004

48%

I Want My T/VO!

Leisure Travelers
14%

Interested in purchasing
vacation time during the
next two years.



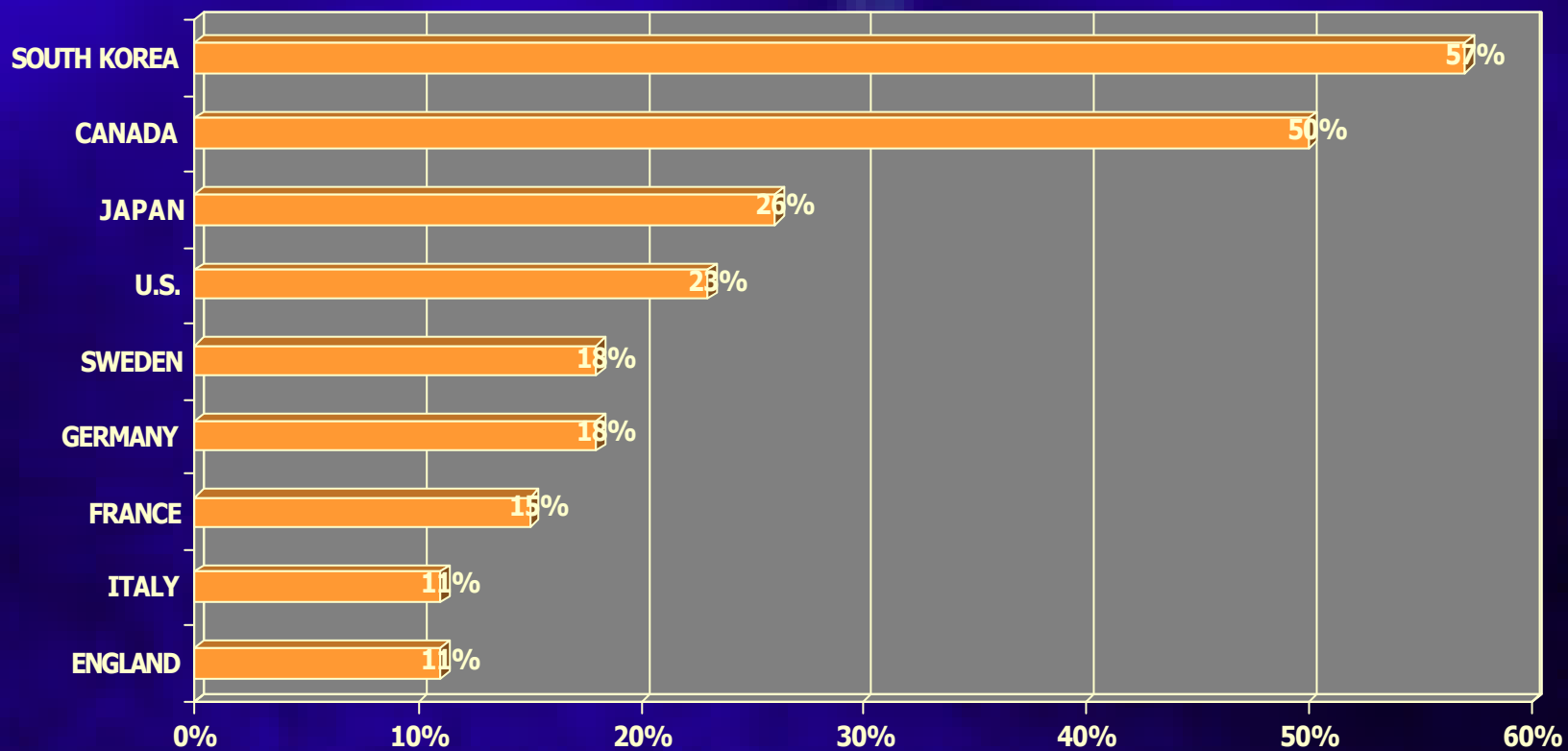


Insight # 5

- *Growing use of the Internet will alter guests' planning and buying habits*
-

Broadband Access

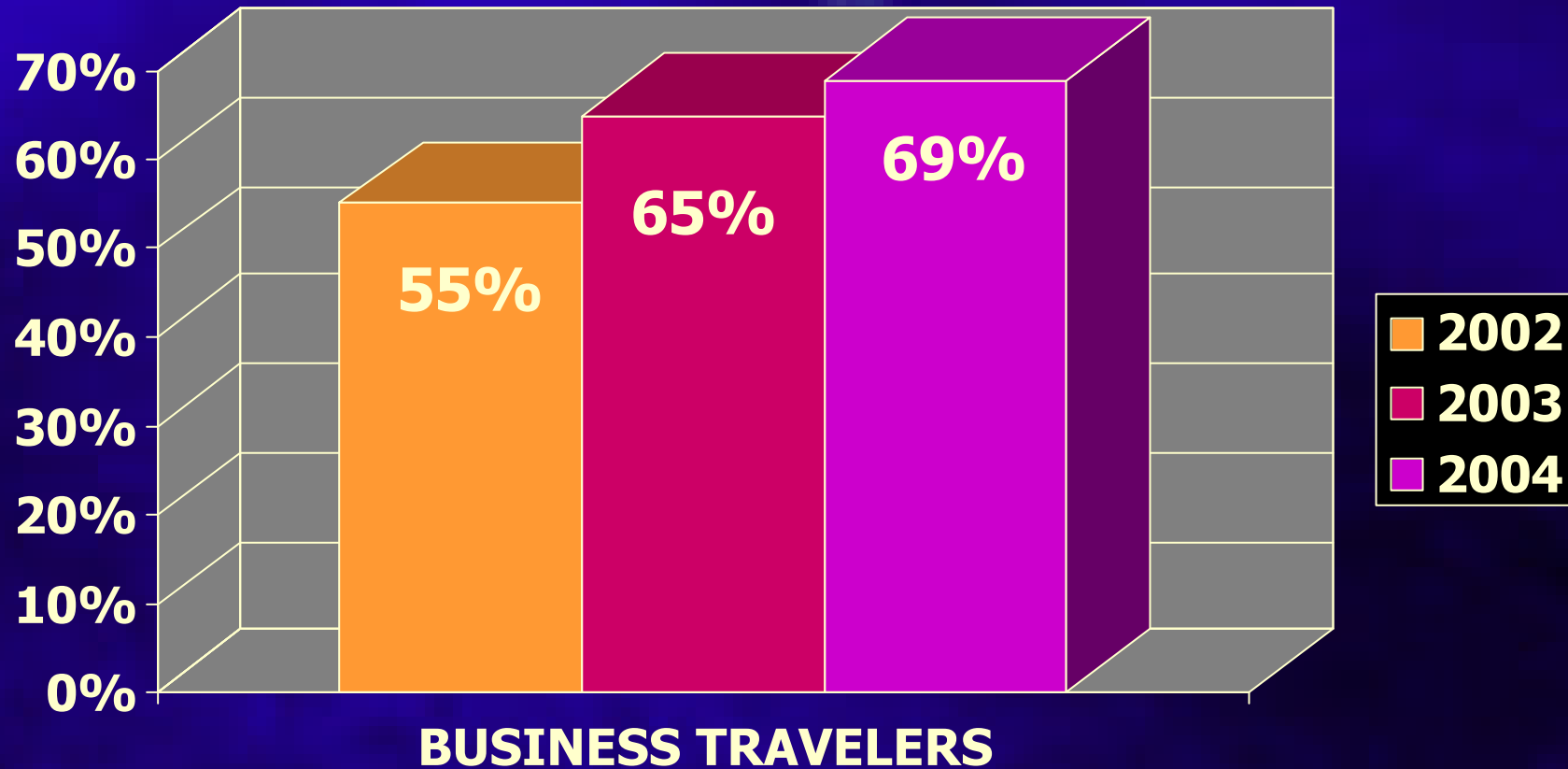
AMONG HOUSEHOLDS WITH INTERNET ACCESS



Source: Yankee Group, 2003

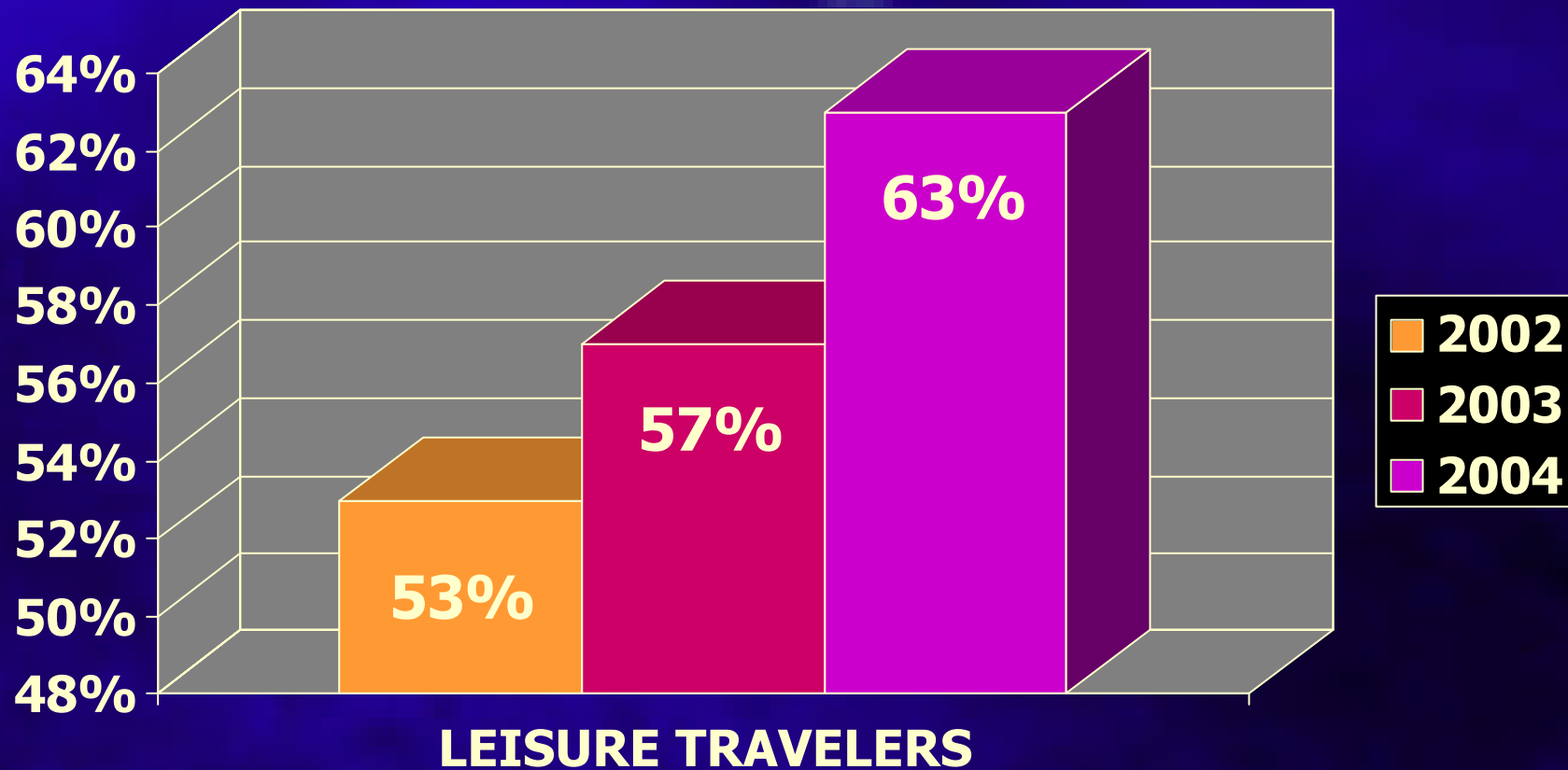
Internet/Online Usage

(To Plan Some Aspect Of Travel)



Internet/Online Usage

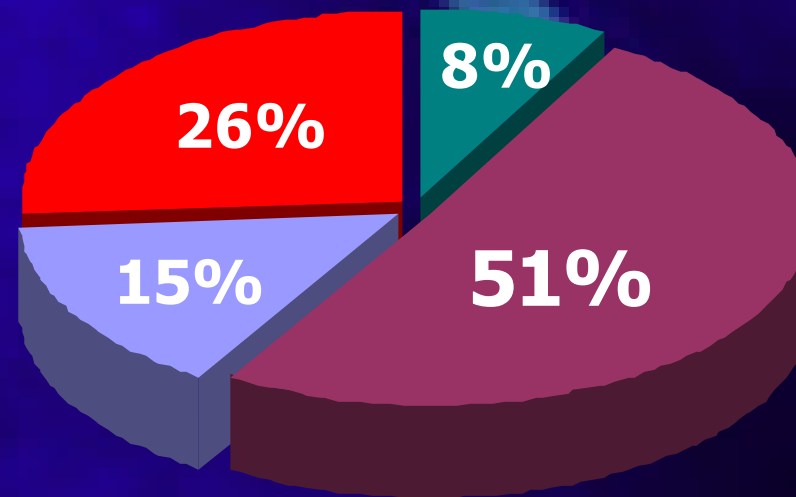
(To Plan Some Aspect Of Travel)

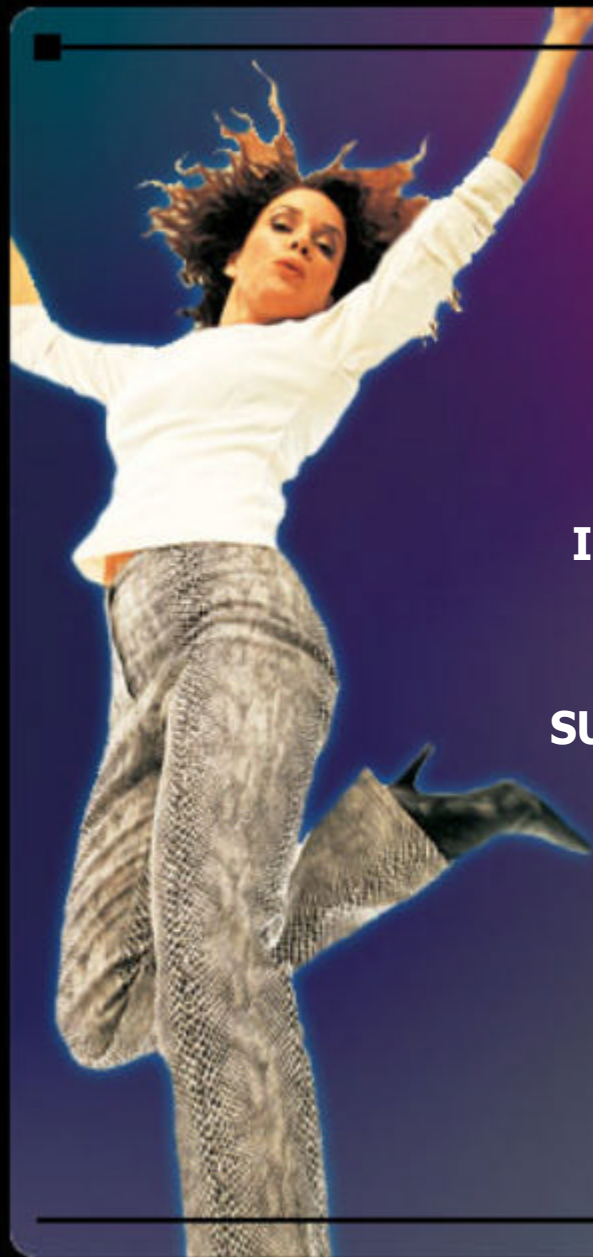


Sources Used When Planning A Vacation

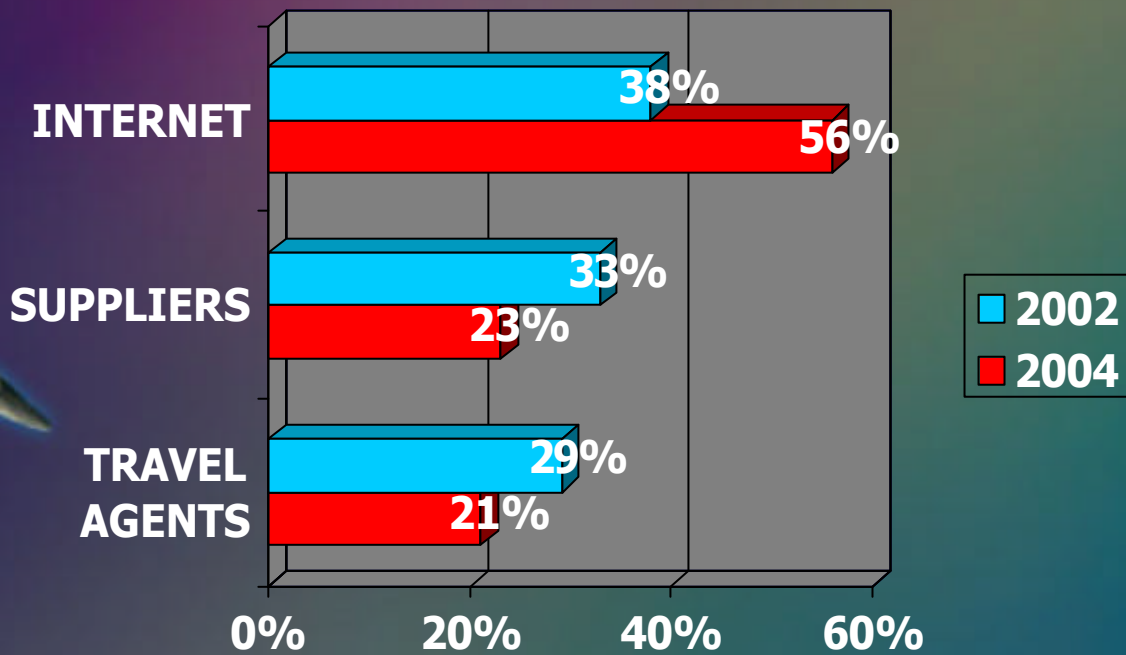
(Leisure Travelers)

- Travel agent only
- Internet only
- Travel agent and Internet
- Neither travel agent nor Internet





I GET THE BEST PRICES ON TRAVEL SERVICES FROM...





Insight # 6

- *Transparent pricing will amplify consumers' growing vigilante spirit*
-



**Online Search:
The Future Of Distribution**



QIXO

The Largest Airfare Search Engine!

"... for those who will be satisfied only by a global search, we did find QixO to be the best of the bunch, both for its relative efficiency and ease of use and because it consistently did better than the other aggregators in our testing." - Money Magazine

[home](#)[flights](#)[hotels/
hostels](#)[cars](#)[cruises](#)[travel
insurance](#)[travel
agents](#)[vacation
package](#)

Looking for cheap airfares with the right flight times? QIXO searches more than 28 popular airfare sites and finds you the best prices and flight times. Search now!

Adults Seniors Children (11 and under)

[what if a child under 18 is traveling alone?](#)

From To
(enter an airport code or a city name)

Depart

Return

You must have a credit card with a U.S. address.

Customer Service

[Existing Reservation](#)

[New Reservation](#)

NEW HOT TRAVEL DEALS

50% Off for your companion. Hawaii and Cancun. Offer Ends Soon!

Save 50% on your companion's airfare from Los Angeles and San Francisco to Hawaii and from Los Angeles to Cancun, for a limited time only! Seats are available now, so hurry, this deal is selling out fast! Select Travel Dates: Hawaii: 10/7 through 12/9, 2004 - Cancun: 9/4 through 9/25, 2004

[Talk to our live chat representative now.](#)

Oahu: 6 days, air & hotel (Thursday departures only) First person pays from \$449. Companion pays from \$285

Kauai: 6 days, air, hotel & car (Thursday departures only) First person pays from \$805. Companion pays from \$639

Maui: 6 days, air & hotel (Thursday departures only) First person pays from \$539. Companion pays from \$369

Cancun: 8 days, air, hotel & transfers (Saturday departures only) First person pays from \$665. Companion pays from \$485

Some of the 27 sites searched!

Airtran	AmericaWest	
Alaska	ATA	Aloha
Cheapseats	Delta	easyJet
United	Frontier	Continental
Europebyair	Hawaiian	
Spirit	Ryanair	Singapore
WestJet	USAirways	OPODS
JetBlue	Jetsgo	

[QIXO Affiliate](#)

[Enter >>](#)

Got a travel-related site?
Make money with QIXO Affiliate Program!

[Easy Cruise Search Engine >>](#)



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Click here to add this website to your favorites.
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Save up to **30% on hotels** in over **50 summer hotspots**



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- hotels
- cars
- vacation packages
- cruises
- deals
- destinations & interests
- maps
- corporate travel

- Site Map
- My Trips
- My Profile
- Customer Support

[Start search over](#)

Change your search

Departure airport:
MCO (Orlando)

Destination airport:
LGA (New York)

Departing: (MM/DD/YY)
5/6/2003

Anytime

Returning: (MM/DD/YY)
5/12/2003

Anytime

Airline: [More info](#)
No Preference

Nonstop flights only

Go

Orlando, FL (MCO) to New York, NY (LGA)

Quick Compare: [Compare airlines](#)

Top 30 picks

All Results

Spirit Airlines

American Airlines

Delta

Northwest

AirTran Airways

US Airways



from \$150



from \$150



from \$150



from \$164



from \$164



from \$164



from \$170



from \$178

1 Choose a departing flight

Sort by: Price Shortest flights Departure time Arrival time

Note: The prices shown below are e-ticket prices and include [all taxes and fees](#). If your itinerary requires paper tickets there will be an [additional charge](#).

from \$150

Web Fare

8:35 AM Depart Orlando (MCO)
Arrive New York (LGA) 11:10 AM

Tue 6-May
2hr 35mn



Spirit Airlines 1862
Nonstop flight

[Choose this departure](#)

from \$164

Comet Travel Search		SNOOZE	SPRIT AIRLINES	AA MORE ROOM	Multiple Carriers	Delta Air Lines	Northwest Airlines	US Airways	United Airlines	AirTran Airways	Continental Airlines	AirTran Airways
Fares by	ORBITZ											
Date	From To	non-stop	\$140+	\$155+	\$159+	\$159+						
	5/6/03 MCO LGA	1 stop	\$369+	\$162+	\$159+	\$159+	\$159+	\$164+	\$170+	\$172+	\$176+	
	5/12/03 LGA MCO	2 stops										

Search: [in city](#) [near address](#) [near airport](#) [near landmark](#)

Enter a city to search multiple sites for hotel savings.

Use commas to separate city, state, country.

Check in



Check out



Rooms

Guests

[Additional search options](#)

SideStep Travel Search

TravelFinds Email

Destinations you want at prices you'll love—delivered right to your inbox!

Email

Home airport

[Preview TravelFinds](#)

[Sign up](#)

Searches Sites Like:



Featuring Destinations Like:

[Atlanta Hotels](#)

[London Hotels](#)

[New York Hotels](#)

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[Miami Hotels](#)

[Paris Hotels](#)

[Seattle Hotels](#)

[Las Vegas Hotels](#)

[New Orleans Hotels](#)

[Philadelphia Hotels](#)

[Washington DC Hotels](#)

Overview

News & Updates

Quick Tour

Locations

Benefits

Features

Leisure Travel

Business Travel

Hoteliers

Awards & Recognition



Search and compare multiple travel websites at the same time for great prices!

Why use just one travel website to search for hotel rooms when Travelaxe can search many different travel websites at the same time for real-time hotel rates?

Hotel	Book #	Rating	City	Distance	Best P.	Savings	AAN	Boo	Hotels	Hot	Lodg	One	Orbitz	Place	Tre
Nevada Palace	Book #	2	Las Veg..	6.85	\$135.00	\$28.50			\$135.00				\$163.50		
New York New York	Book #	4	Las Veg..	4.64	\$212.52	\$86.52			\$286.50				\$212.52		
Palace	Book #	3	Las Veg..	5.25	\$94.83	\$94.83	\$94.83				\$143.88	\$110.26	\$110.26		
Palace Station	Book #	3	Las Veg..	1.89	\$42.51	\$75.21	\$55.59	\$49.05	\$102.00		\$94.83		\$98.07	\$117.72	\$42.51
Palms	Book #	4	Las Veg..	4.28	\$222.36	\$46.14			\$268.50		\$222.36		\$225.63		
Paris	Book #	4	Las Veg..	3.96	\$202.74	\$187.02			\$230.50				\$291.03	\$238.71	\$20
Plaza	Book #	2	Las Veg..	0.68	\$96.47	\$63.78	\$129...	\$113...	\$159.00	\$96.47	\$143.88		\$127.53	\$160.23	
Quality Inn Key Largo	Book #	2	Las Veg..	3.71	\$88.26	\$117.75	\$114...	\$88.26	\$156.00		\$134.04	\$125...	\$108.69	\$206.01	
Ramada -Speedway	Book #	2	Las Veg..	4.06	\$135.00	\$12.15			\$135.00			\$135...	\$135.41	\$147.15	
Residence Inn	Book #	3	Las Veg..	2.58	\$274.68	\$48.66							\$323.34	\$274.68	
Residence Inn By Ma...	Book #	3	Henders...	7.78	\$306.99								\$306.99		
Residence Inn Hugh...	Book #	3	Las Veg..	3.63	\$355.97							\$355...	\$355.97		
Rio	Book #	4	Las Veg..	3.96	\$238.71	\$14.79			\$253.50		\$241.98		\$238.71		
Riviera	Book #	3	Las Veg..	2.20	\$94.01	\$105.46	\$107...	\$95.71	\$156.00		\$199.47	\$129...	\$94.01	\$179.85	\$94.01
Rodeway Inn And Sui...	Book #	1	Las Veg..	4.64	\$82.77	\$106.89				\$115...	\$156.96	\$122...	\$108.73	\$189.66	\$10
Royal Hotel And Cas...	Book #	3	Las Veg..	2.47	\$139.56	\$69.72		\$139...	\$186.00		\$209.28				
Royal Vacations Suit...	Book #	3	Las Veg..	2.47	\$163.47	\$38.88					\$202...		\$163.47		
Sahara	Book #	3	Las Veg..	1.72	\$127.53	\$40.47	\$127...		\$168.00				\$160.23	\$153.69	

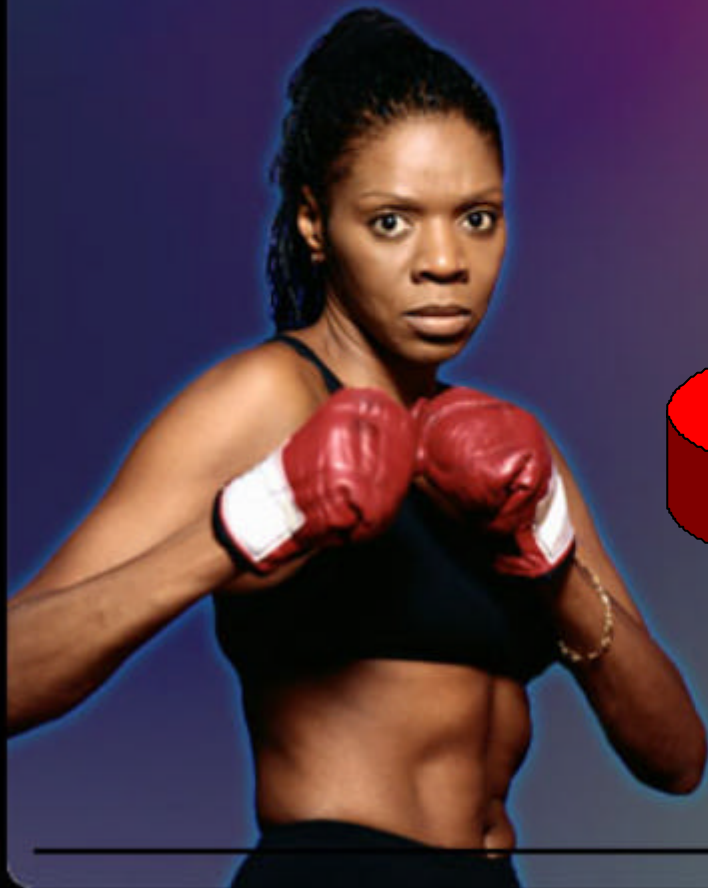
Travelaxe is a **free** (for leisure and business travelers) downloadable Windows program that searches multiple travel websites at the same time for hotel rates in **1158** cities from **54** different countries and lets you compare the prices from each travel website side-by-side, highlighting the cheapest prices found for each hotel. The amount you can save for each hotel is also displayed so you can see the savings! When you find the price you want, Travelaxe takes you right to the booking page at the cheapest travel website to complete your reservation with that website. Using Travelaxe can save you both time and money when looking for a hotel for your next trip!

Travelaxe is now available for hoteliers to use for competitive analysis, revenue management and compliance. [Click here](#) to read more about how Travelaxe can benefit hoteliers.

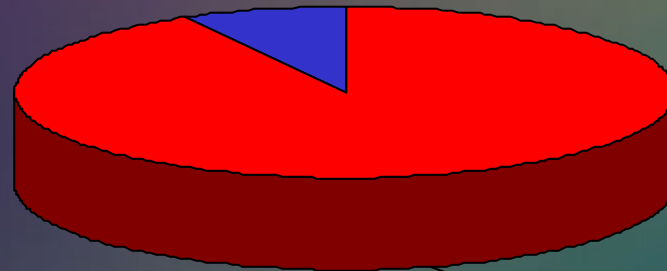
Getting Started

To get started using Travelaxe, go to the [download](#) page to download and install Travelaxe on your computer.

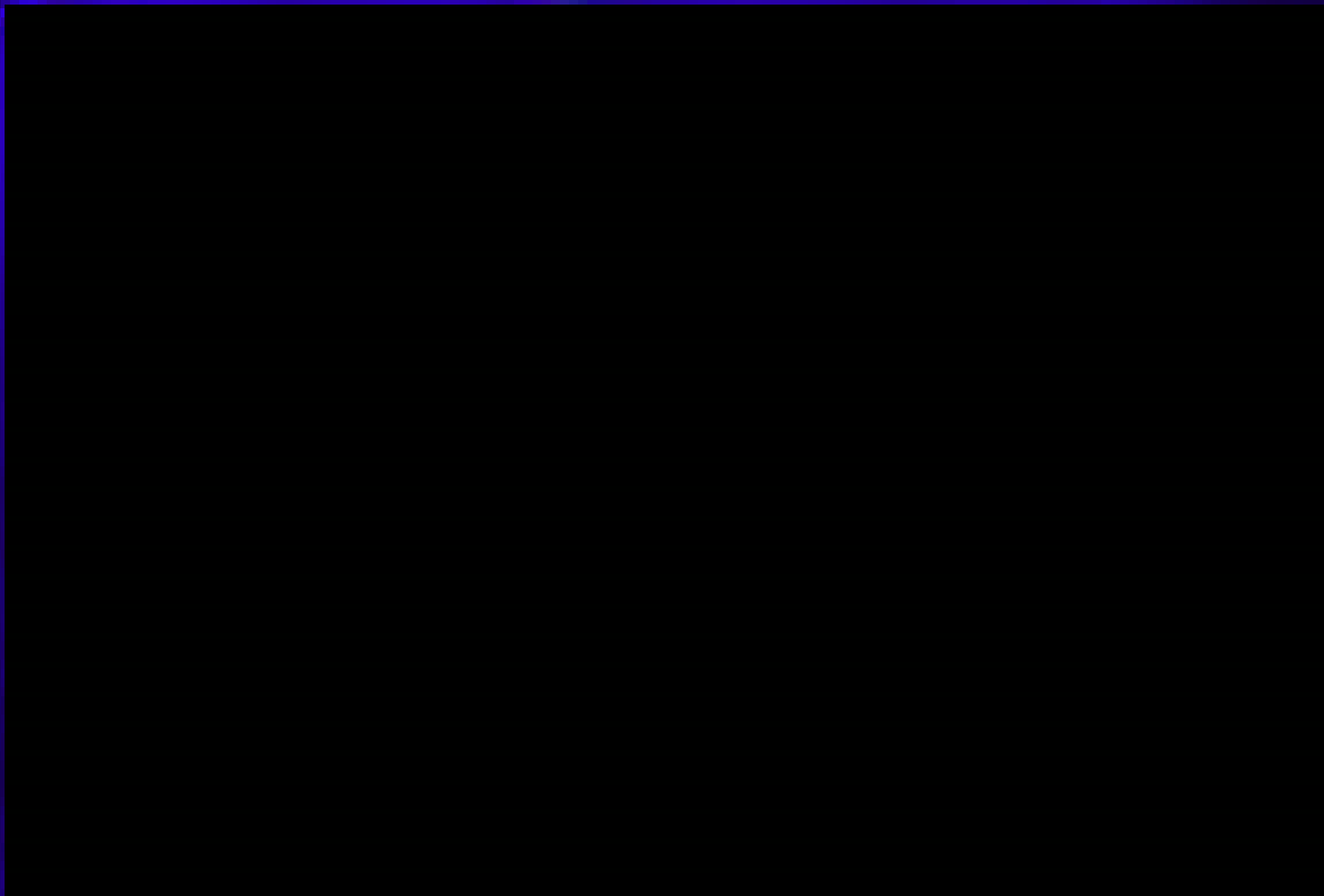
New Attitude Toward Business



IT'S USUALLY NOT NECESSARY TO PAY
FULL PRICE FOR MOST GOODS AND
SERVICES BECAUSE YOU CAN
GENERALLY FIND THINGS ON SALE

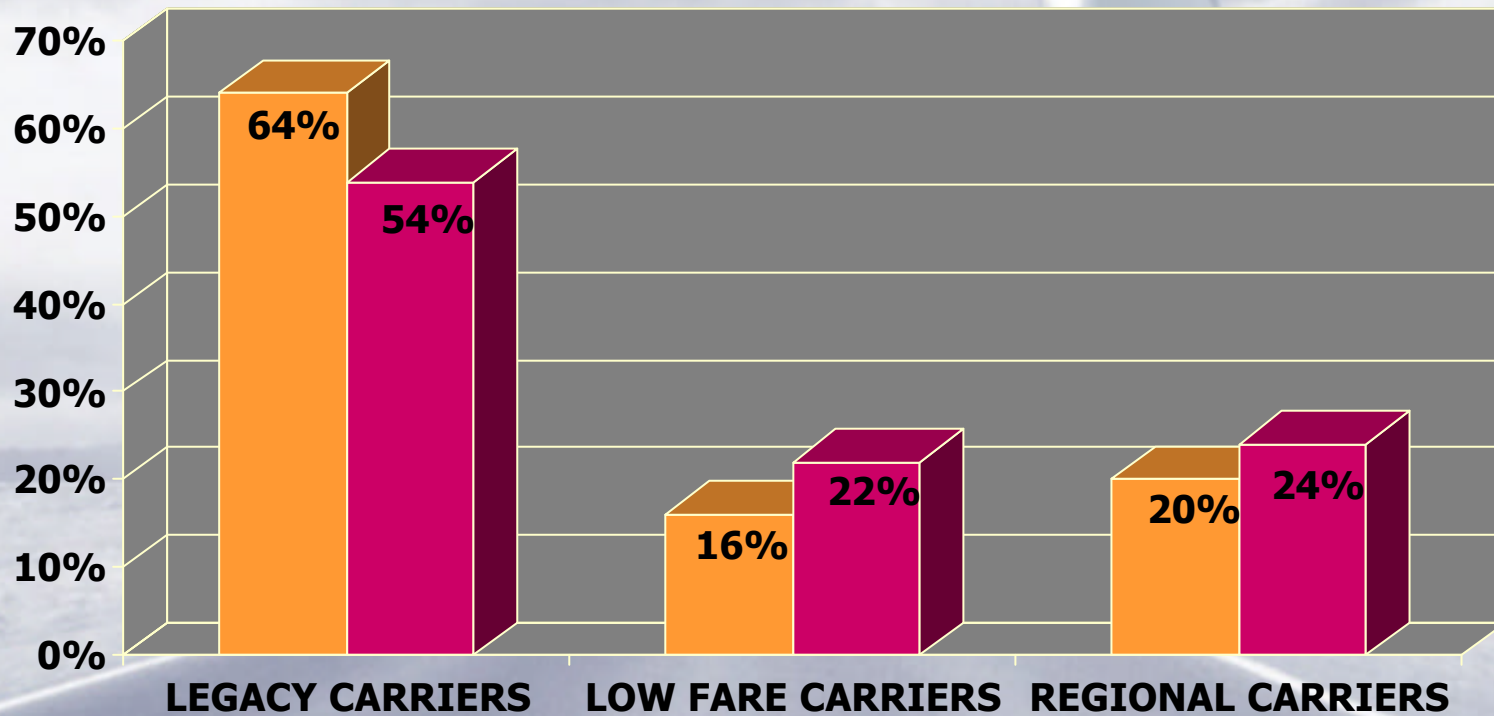


AGREE
92%



Air Passengers By Carrier Type

(2000 V. 2003)



Source: U.S. Department Of Transportation, 2003.

A Quid Pro Quo

(For Business Travelers)

Agree:

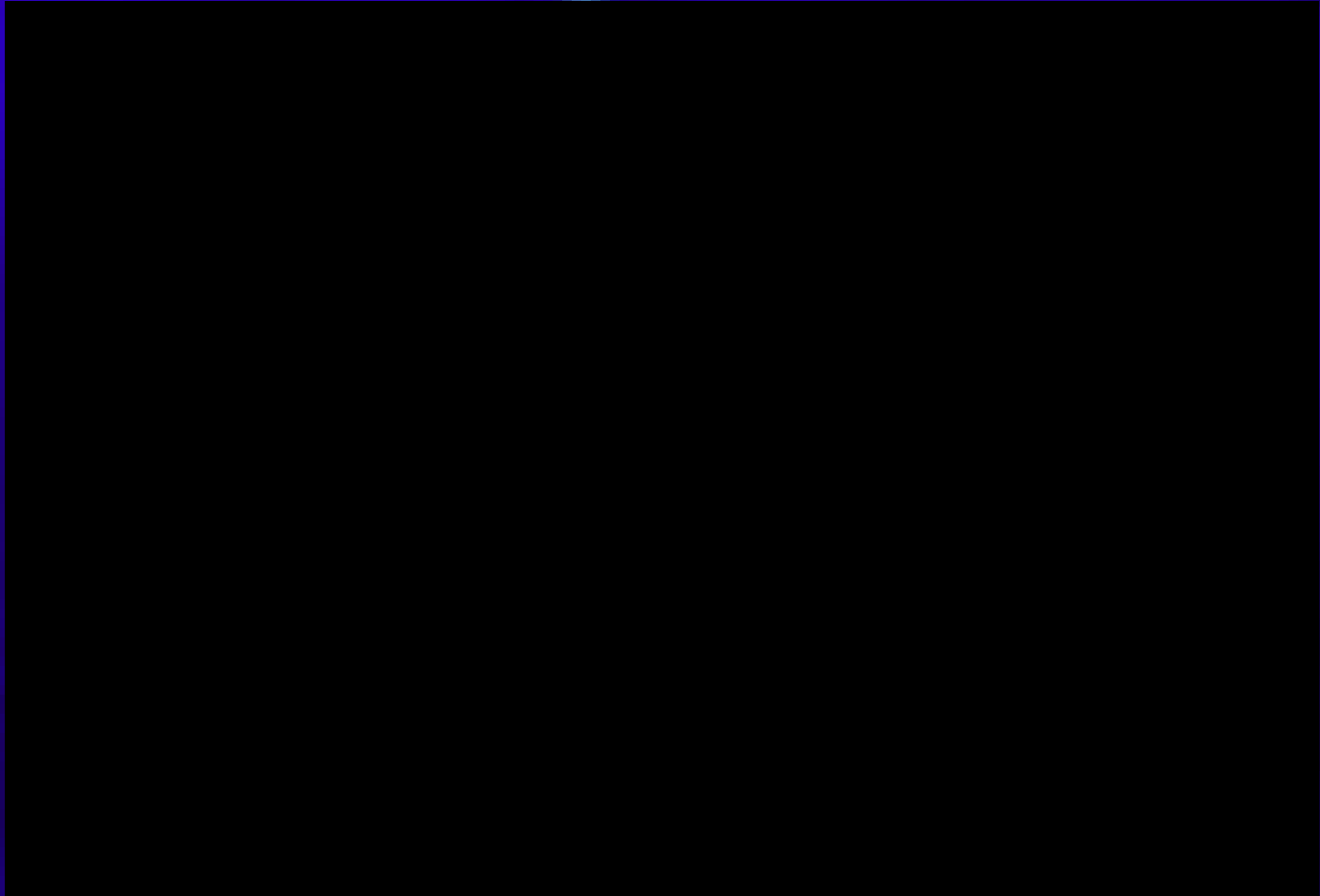
2004

I try to earn more miles and points
whenever I travel on business

49% ?

I try to earn miles and points
whenever I purchase goods and
services other than travel

34% ?



The background of the slide is a blurred image with warm, golden-brown and light grey tones, suggesting a close-up of a person's skin or a similar texture.

YPBR

Yesawich, Pepperdine, Brown & Russell

www.ypbr.com

