Institute for Systemic Management
and Public Governance

University of St.Gallen

Travel Market Switzerland 2012-
Basic Report and Database Specification

Prof. Dr. Christian Laesser
Mag. Barbara Riegler

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- Key features of TMS
- Some results (selection)

Key features of TMS

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Scope

- **Private trips**:
  Travel away from home with
  - at least 1 overnight stay
  - all leisure reasons

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Method, Sampling, Sample

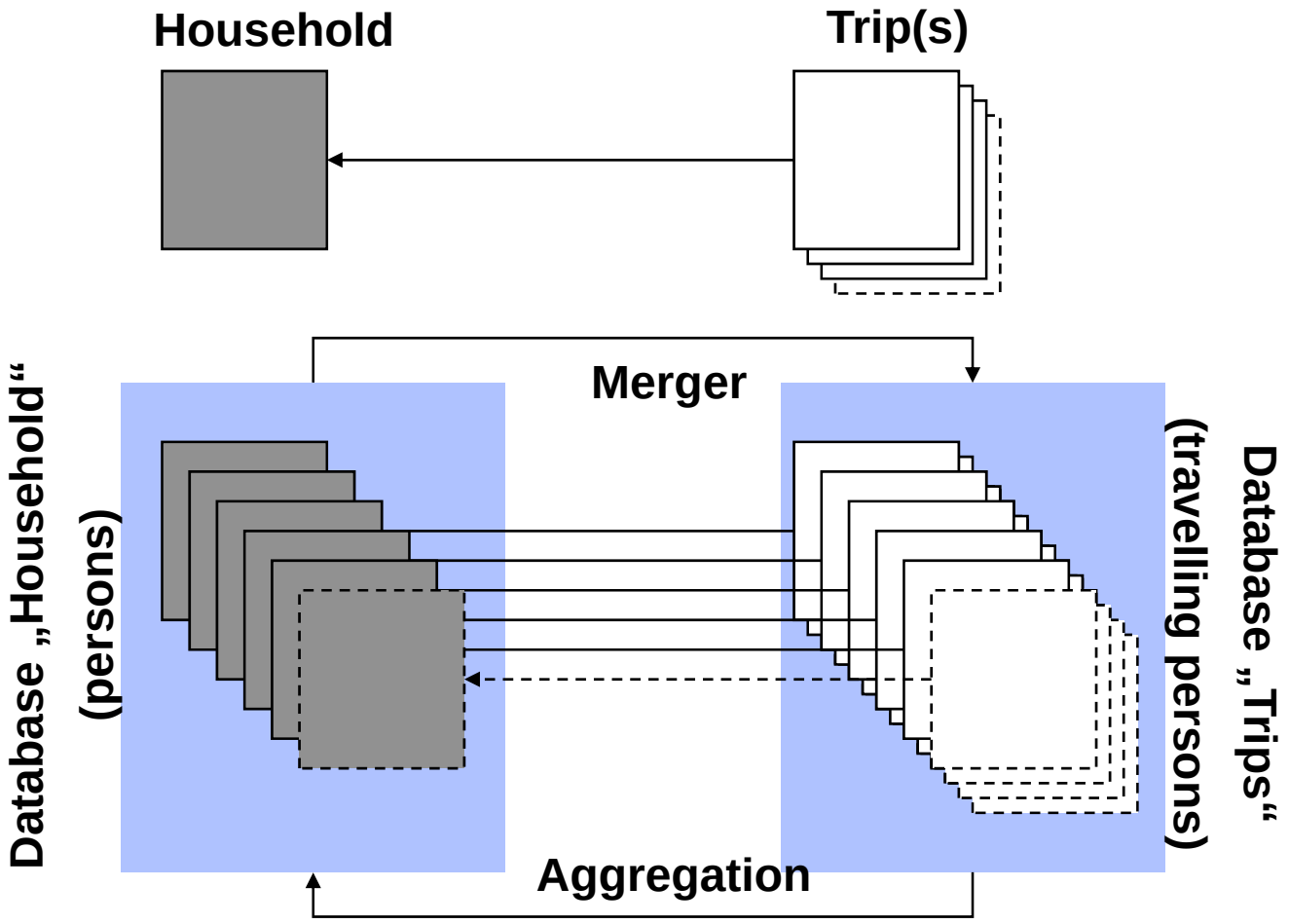
- **Method:**
  Self-administered and structured written interviews of households, including the examination of
  - the households themselves
  - all trips made by their members
- **Sampling:**
  Representative sample of households, located in the German- and French-speaking parts of Switzerland
- **Sample (non weighted):**
  - 3,403 households
  - 7,818 persons
  - 6,445 usable cases of trips

Limitations/ Underrepresentation

- Persons in collective households
- Persons older than 80
- Most of the foreign citizens in the survey come from the neighboring countries
- Trips with a regular and homogeneous repetition rate (for example to own holiday homes)
- A maximum of 5 trips per quarter was tolerated

➔ **Approximately 20-25% of all trips taken have not been recorded**

Database rational of TMS



Key travel variables recorded (I)

- Destination
- Personality of destination
- Number of participants
- Duration of trip
- Month and weekday of trip
- Time based reason of trip
- Type of trip
- Travel motivation
- Point of time of travel decision
- Channels and sources of information
- Travel decision structure (pro destination vs. pro activity)

Key travel variables recorded (II)

- Degree of packaging and time of booking
- Booking channel
- Means of transportation to destination
- Type of accommodation
- Activities (sports and non-sports activities)
- Satisfaction: with trip as a whole, with the products offered in the destination, with the accommodation chosen
- Travel costs
- Probability of returning to the same destination or the same accommodation
- Probability of recommendation of destination and accommodation

Some results

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Results overview
With regard to...

- **travel propensities**, Switzerland has had one of its most travel intensive travel year ever, mainly due to
  - travelling has constantly becoming cheaper
  - the economic prosperity and
  - favourable outlook during large parts of reporting year;

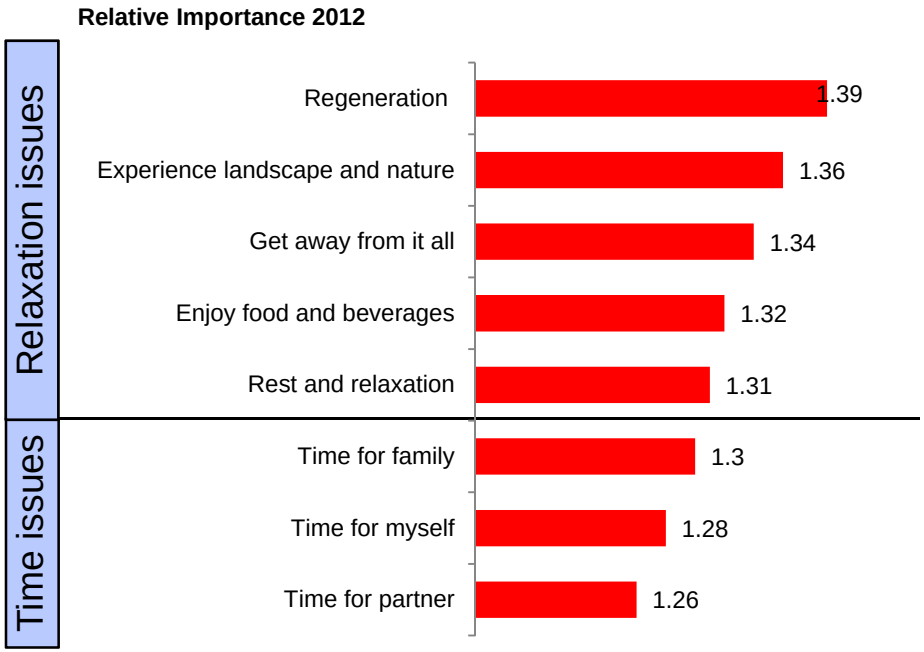
- the **choice of destination**, Switzerland remains the favourite destination but is on the way of losing its “pole position”. Neighbouring countries could increase their market share while non neighbouring and overseas destinations remained stable;

Results overview
With regard to...

- the **duration of trips**, most trips last less than one week. Especially short trips up to three nights have increased their market share. The "classic" two week trip is more than ever challenged by shorter as well as longer lasting trips;
- the **month of departure**, July remains the strongest month. Additionally, the month of October showed a high travel intensity. However, more than half of the trips take place during the first seven months of the year;
- **booking**, all travel components are predominantly booked online, especially transportation and accommodation is barely booked via any other booking channel;

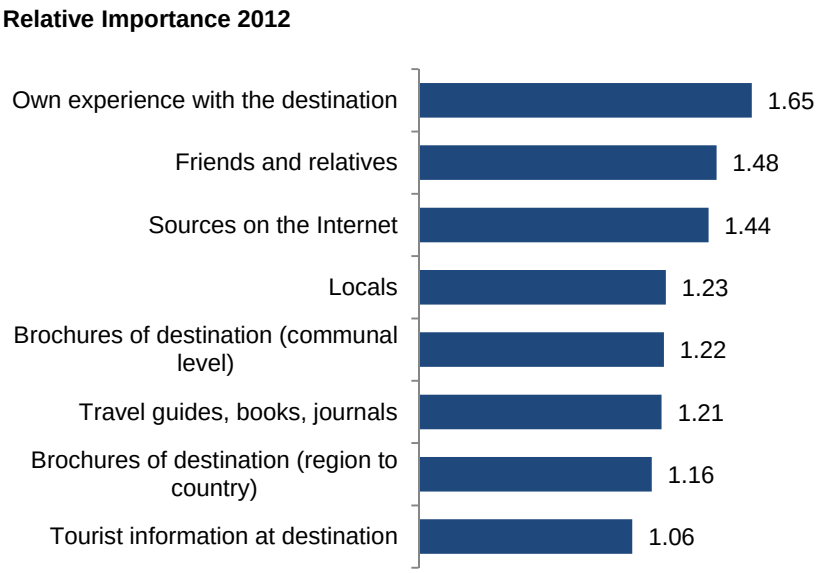
Results overview
With regard to...

- **travel motivation**, people want
  - to relax and get away from daily routine,
  - experience natural and artificial sights,
  - to spend time with partner and family and
  - to get pampered.
  - Entertainment issues are less dominant than in previous years;



Results overview
With regard to...

- **information acquisition**, there is a tripartite of major external sources of information, consisting of
  - information given face-to-face,
  - sources on the Internet and
  - destination brochures (on the communal, regional and country level);
  - However, the major source of information remains *previous experience*;



Results overview
With regard to...

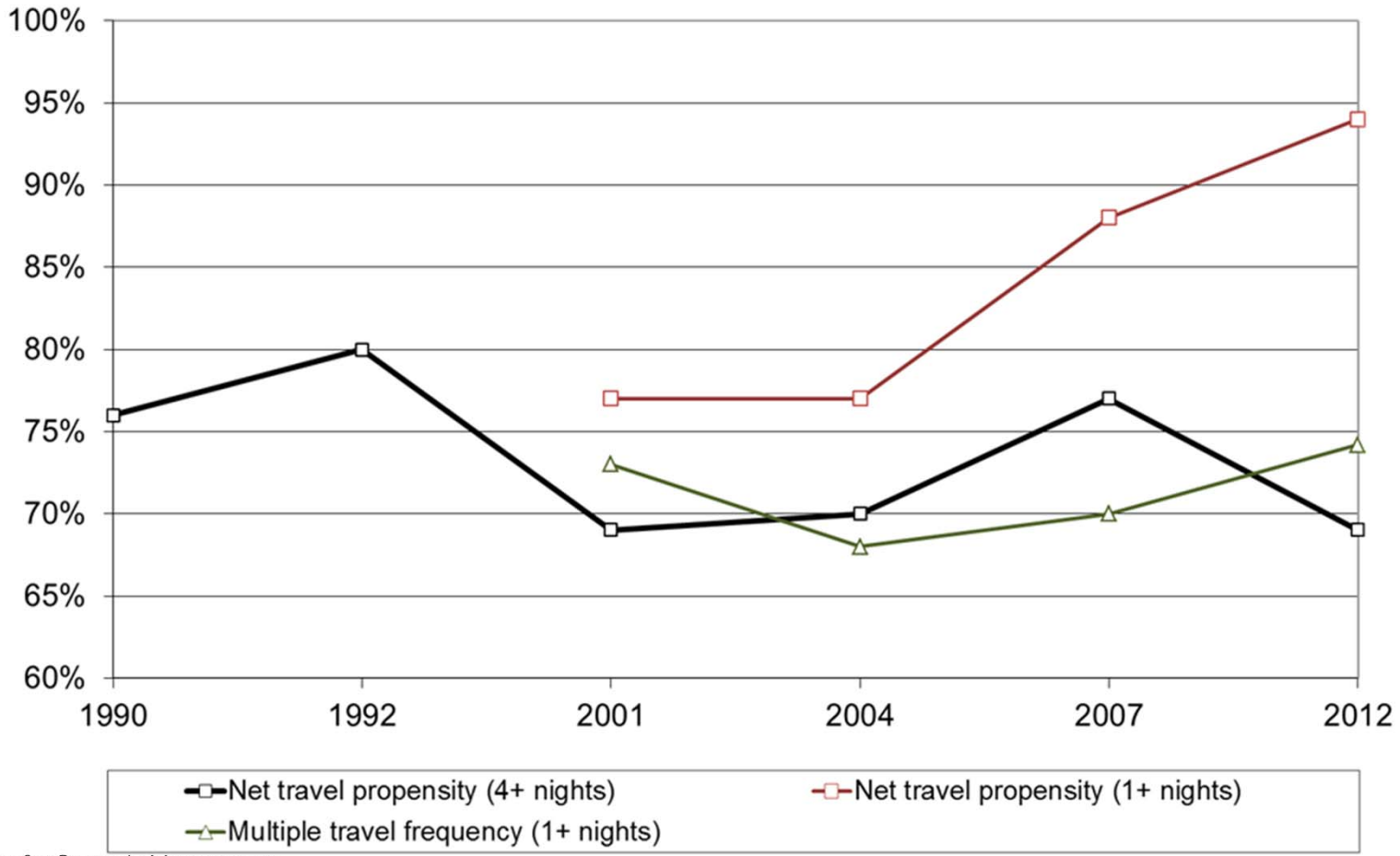
- **modes of transport**, in 2012 modes of transport are still dominated by the car. Travelling by plane still increased and scheduled flights as mode of transport gained the highest market share ever. Trains again have continuously lost market shares;
- **type of accommodation**, the hotel industry in general and 4-star and 5-star hotels in particular have slightly increased market shares. As travellers from Switzerland prefer to stay in hotels when travelling internationally, and international travel has gained market shares, this comes to no surprise.

Results overview
Summary

- **In summary, a prosperous 2012 has led**
  - **to an increased travel activity with a gross travel propensity higher than ever before,**
  - **a high number of short trips with less than 7 overnight stays to**
  - **destinations in Switzerland and its neighbouring countries.**

  - **Swiss tourists are seeking for relaxation and enjoyment**
  - **and are thus willing to accept a high value-cost trade-off.**

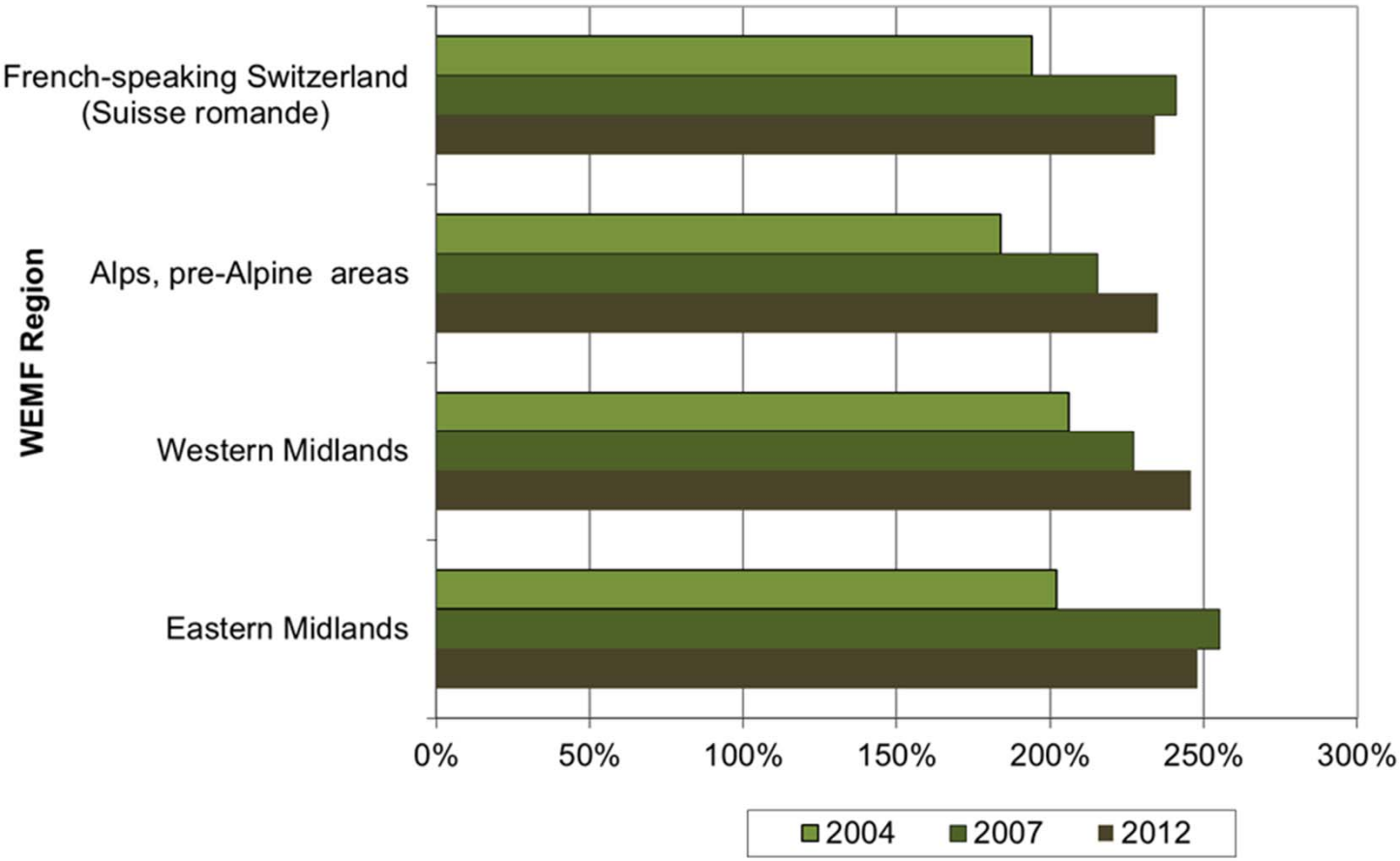
Travel propensities overview



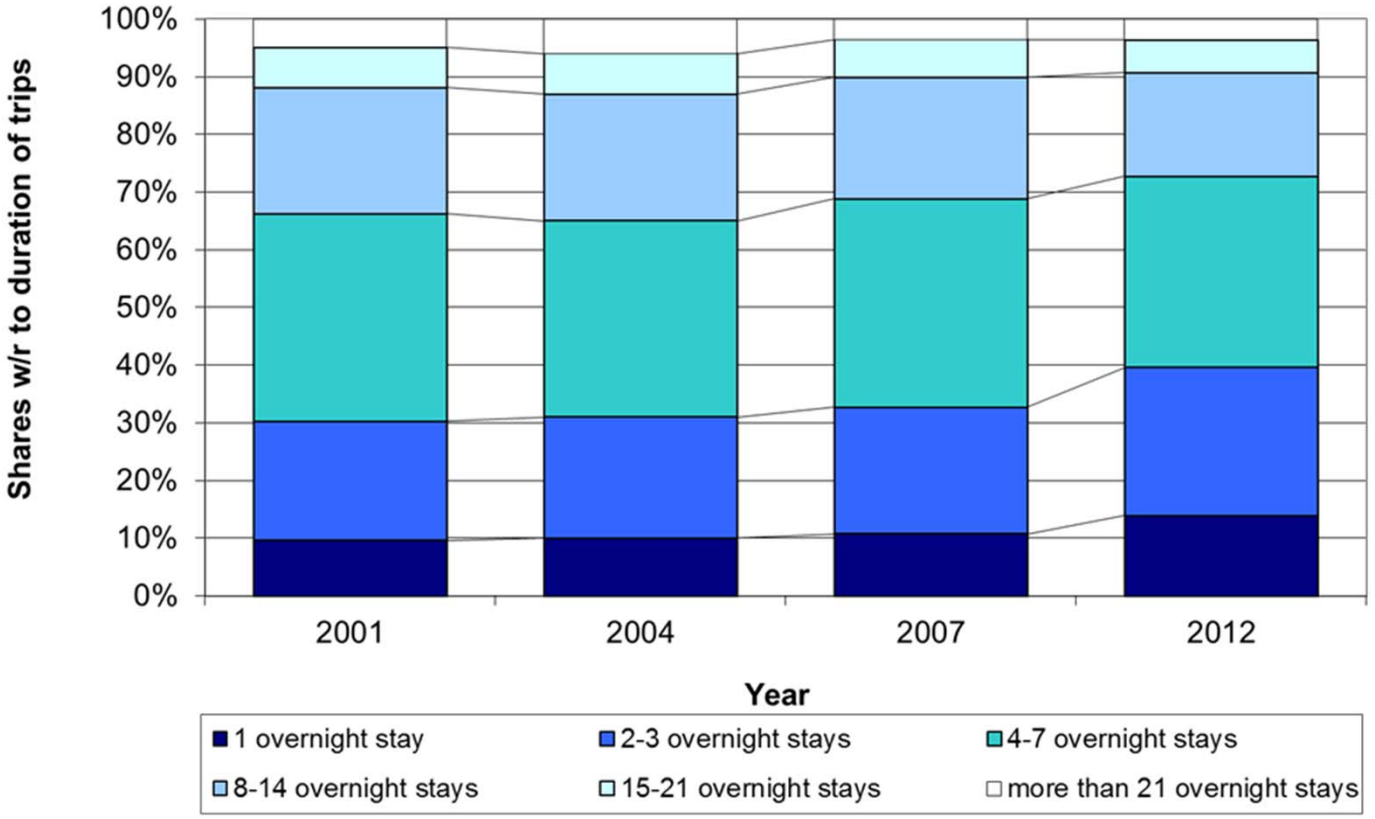
Net travel propensity with regard to trips with 4+ overnight stays



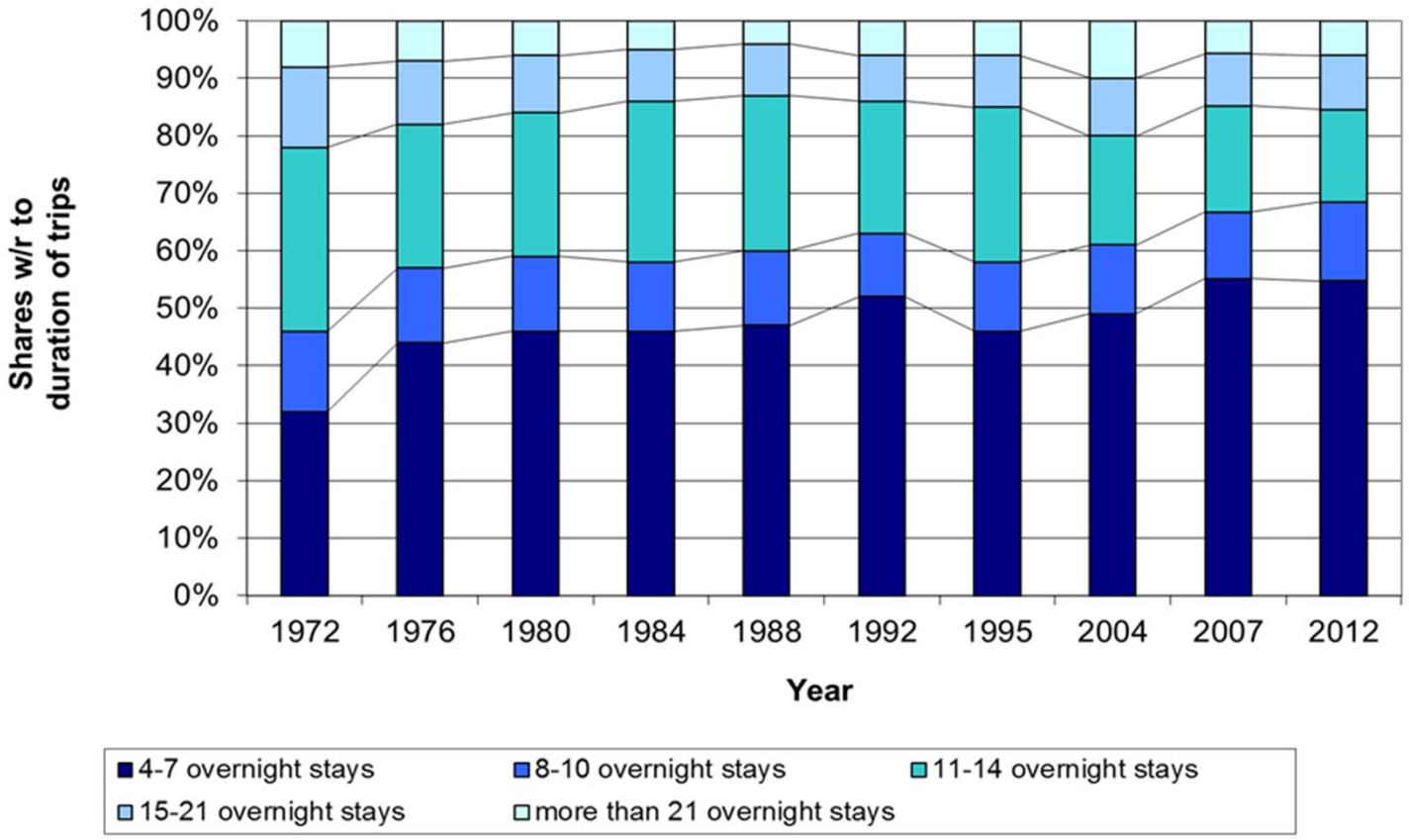
Gross travel propensity by WEMF region (1+ overnights)



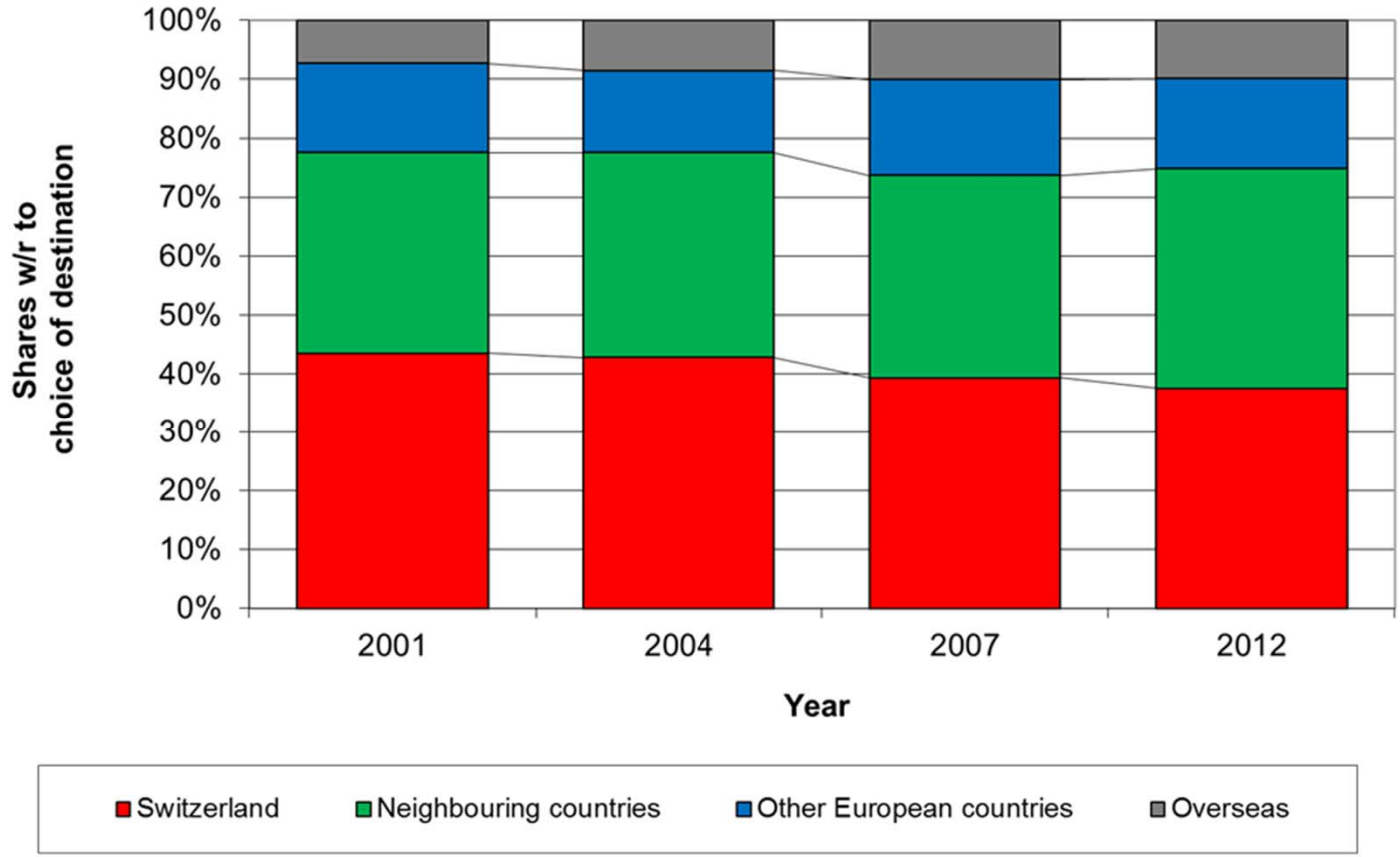
Duration of trip (1+ overnights)



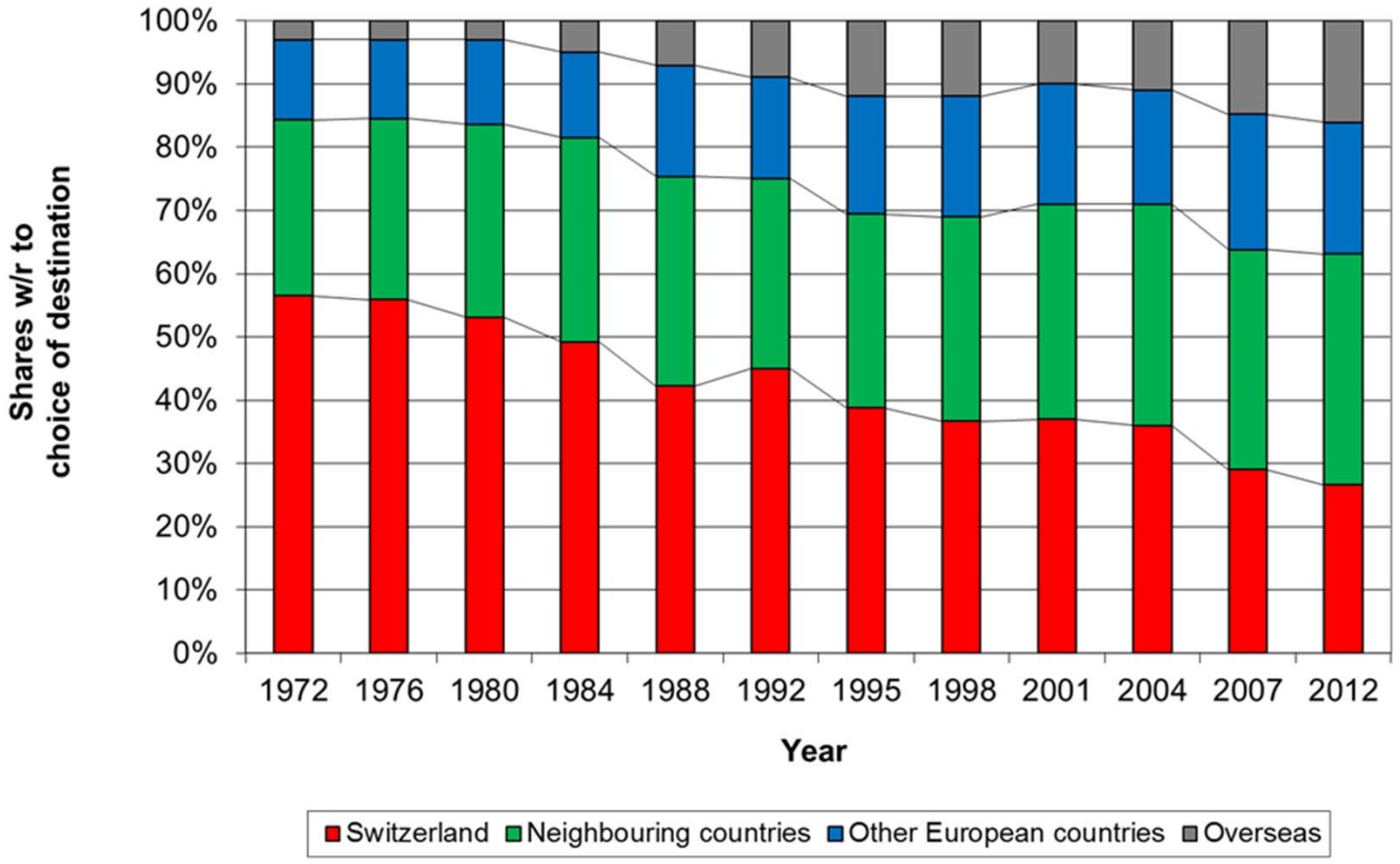
Duration of trip (4+ overnights)



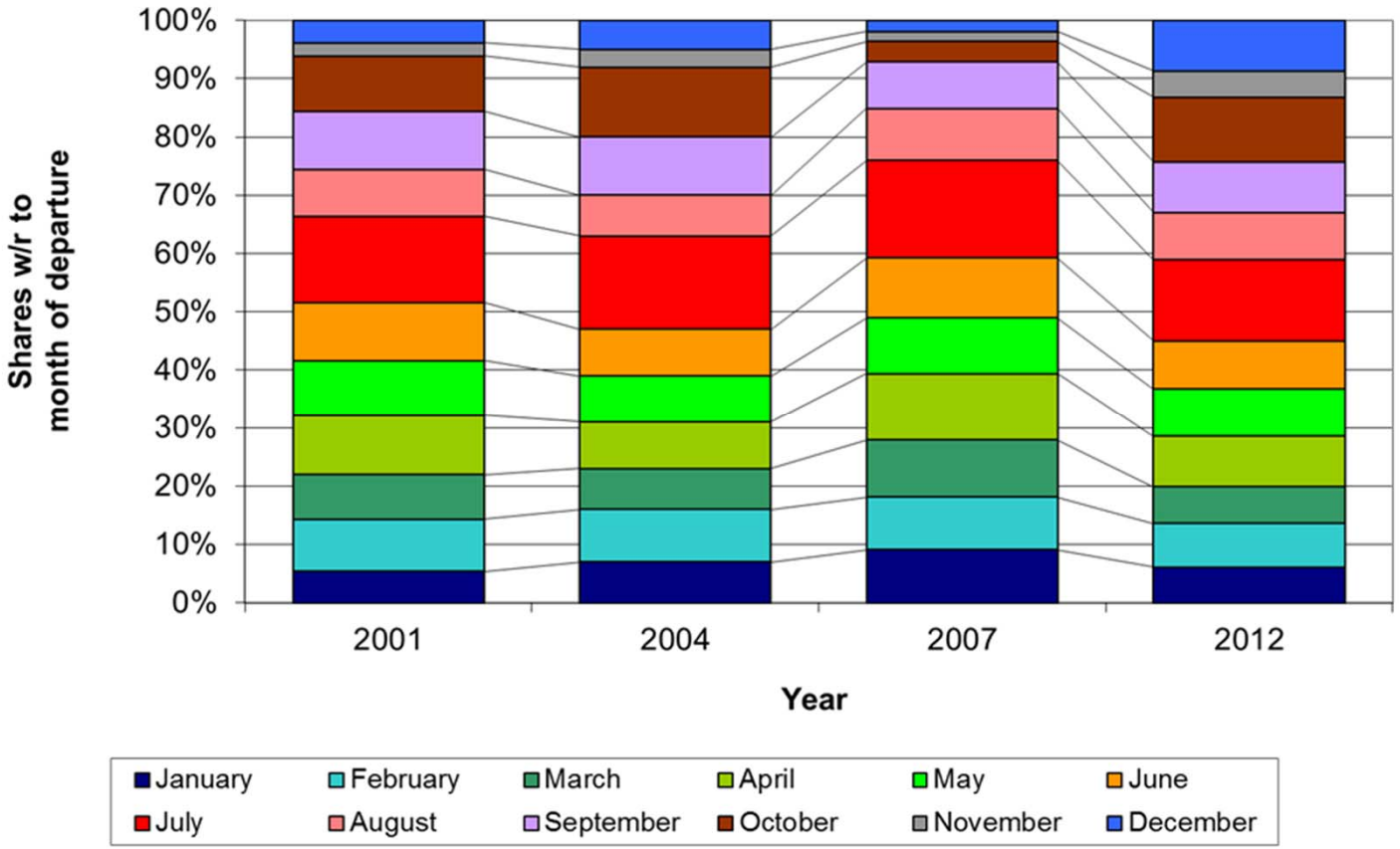
Choice of destination (1+ overnights)



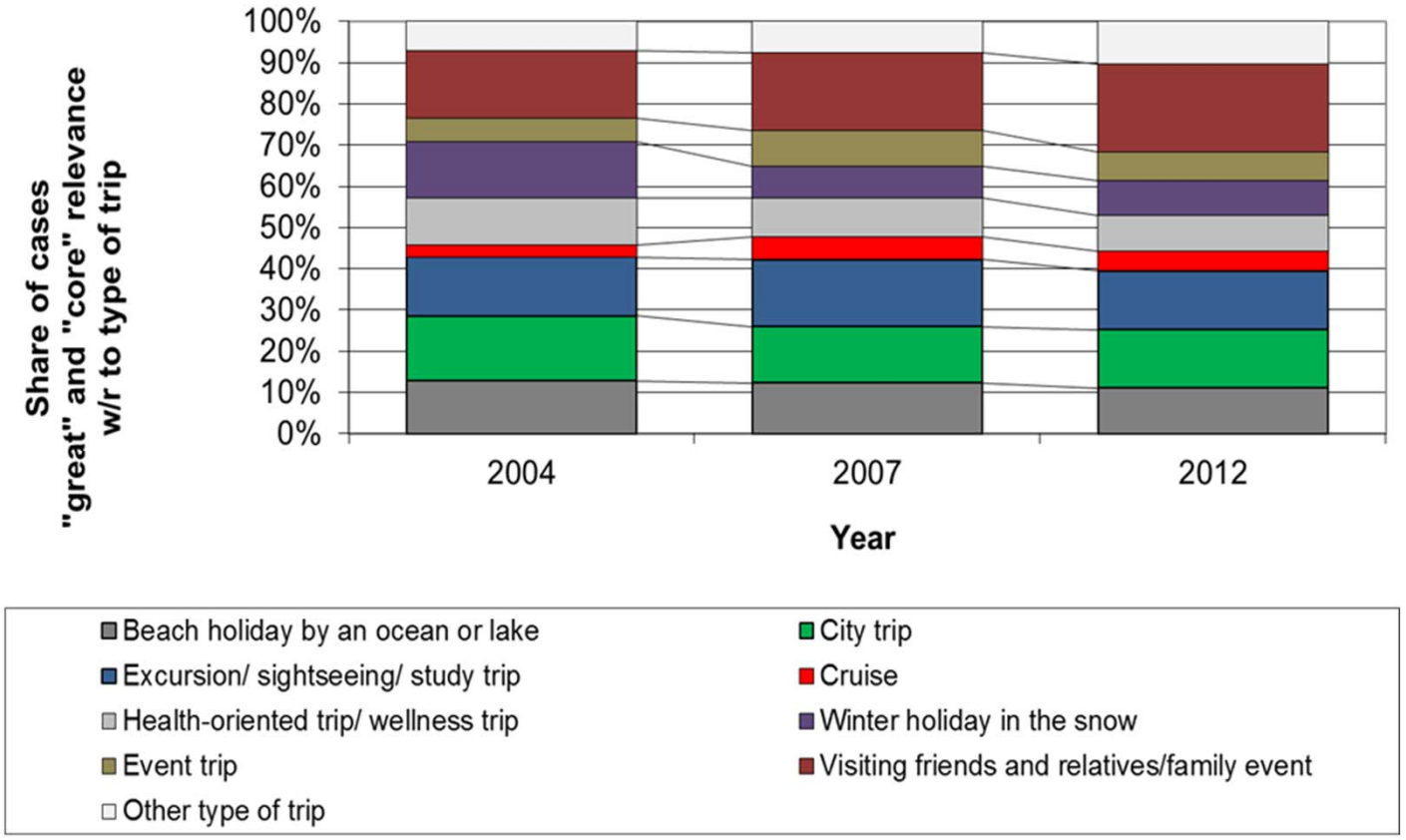
Choice of destination (4+ overnights)



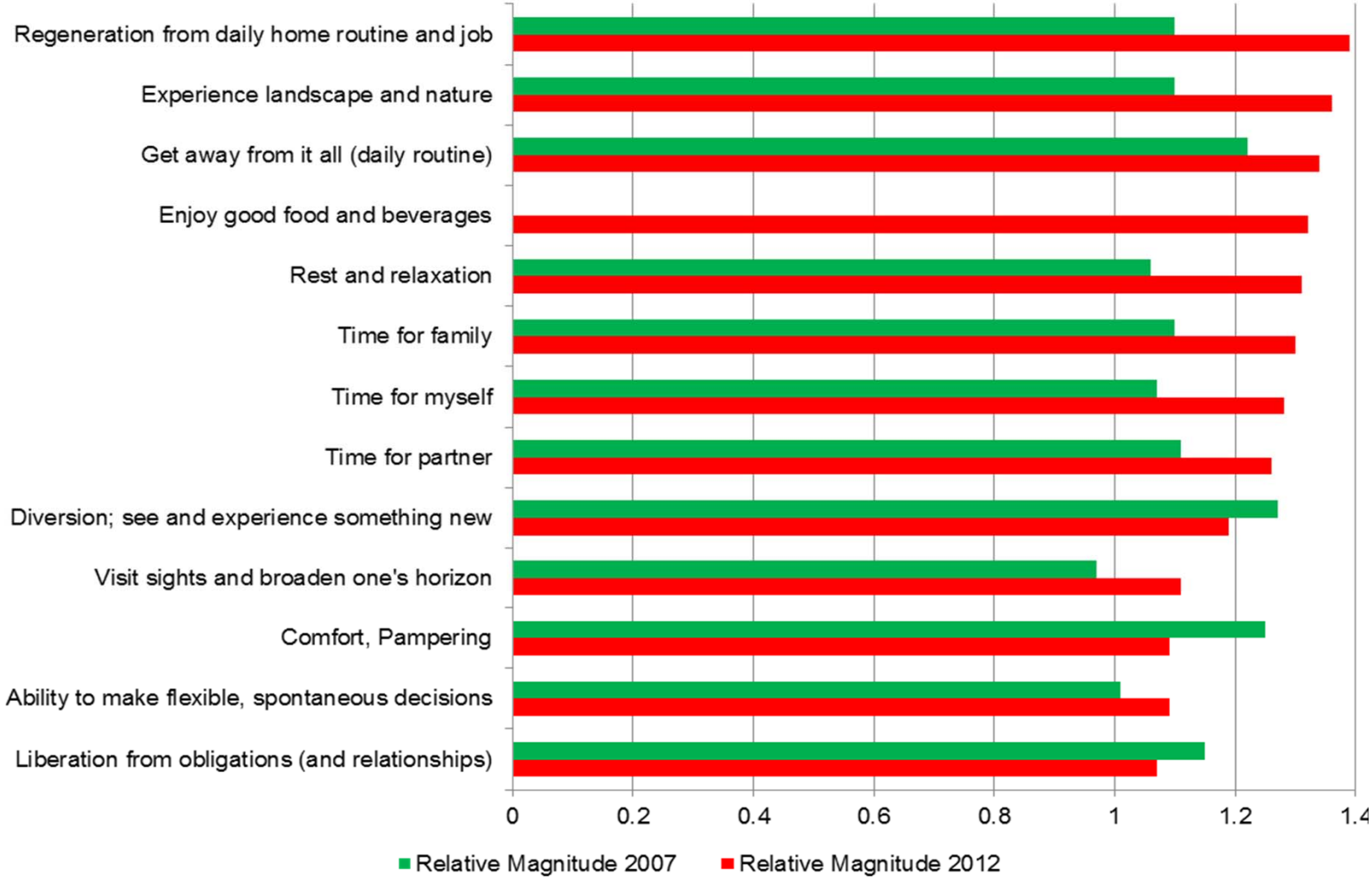
Month of departure (1+ overnights)



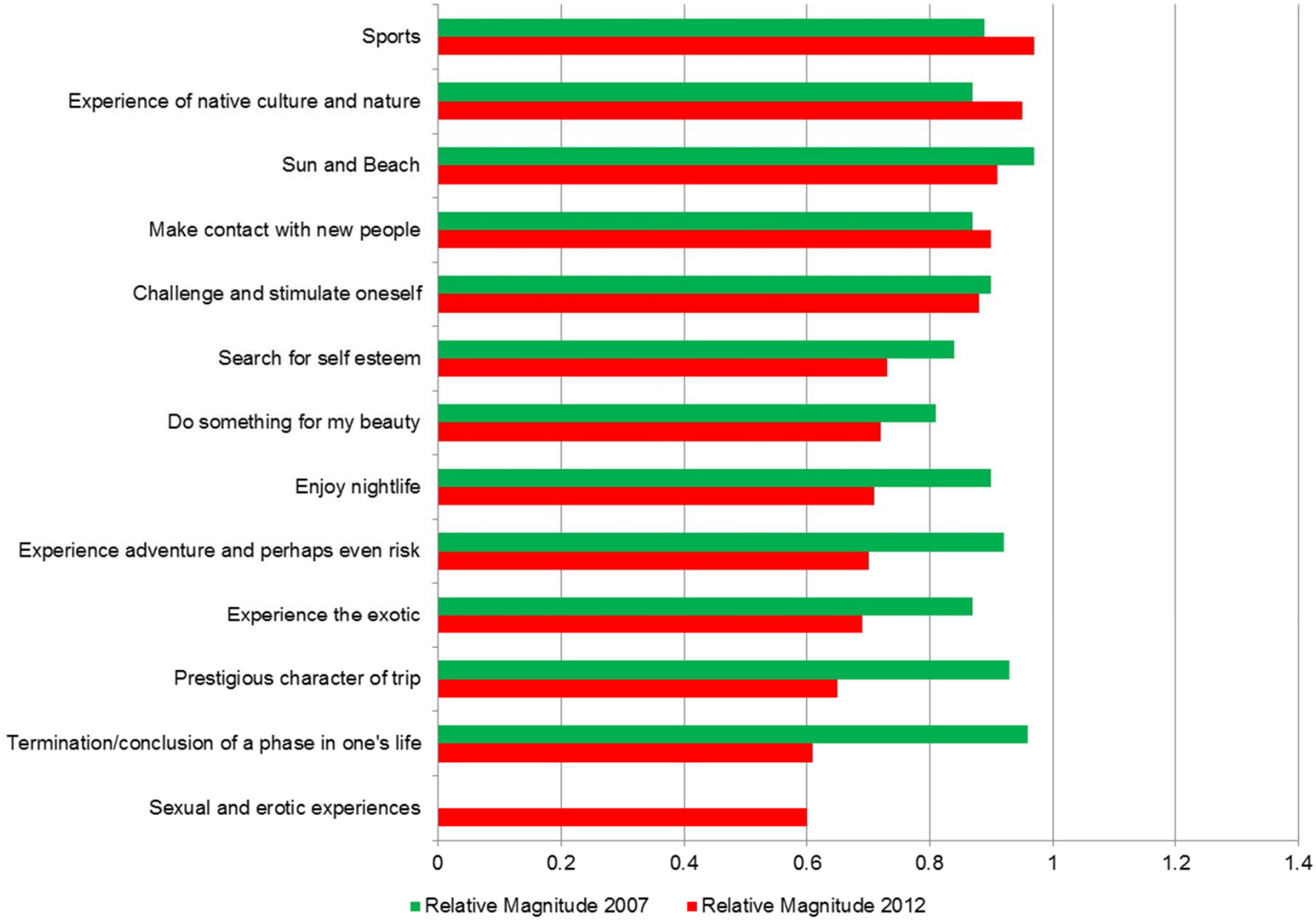
Type of trip (1+ overnights)



Travel motivation (1+ overnights) (1)



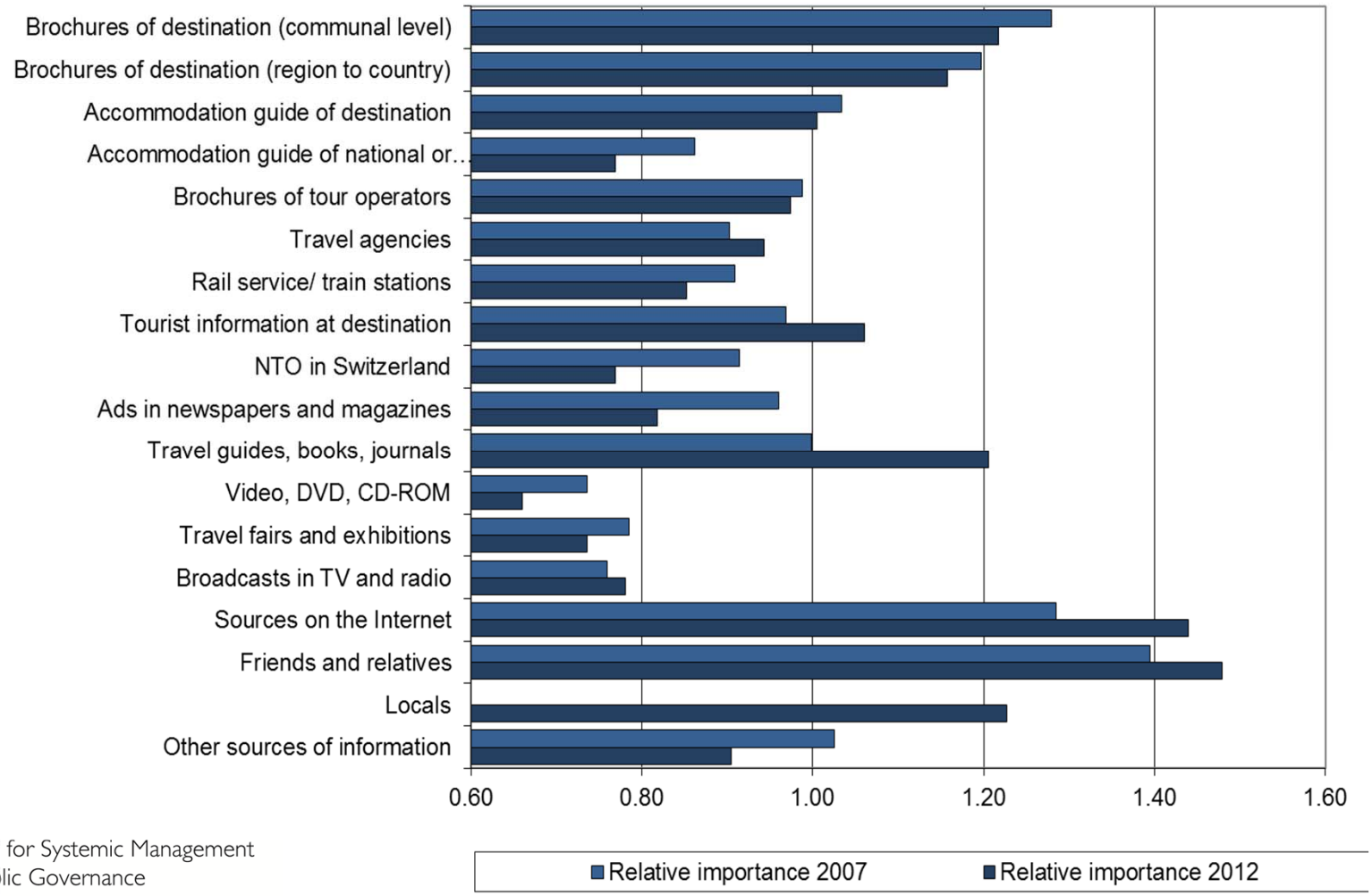
Travel motivation (1+ overnights) (2)



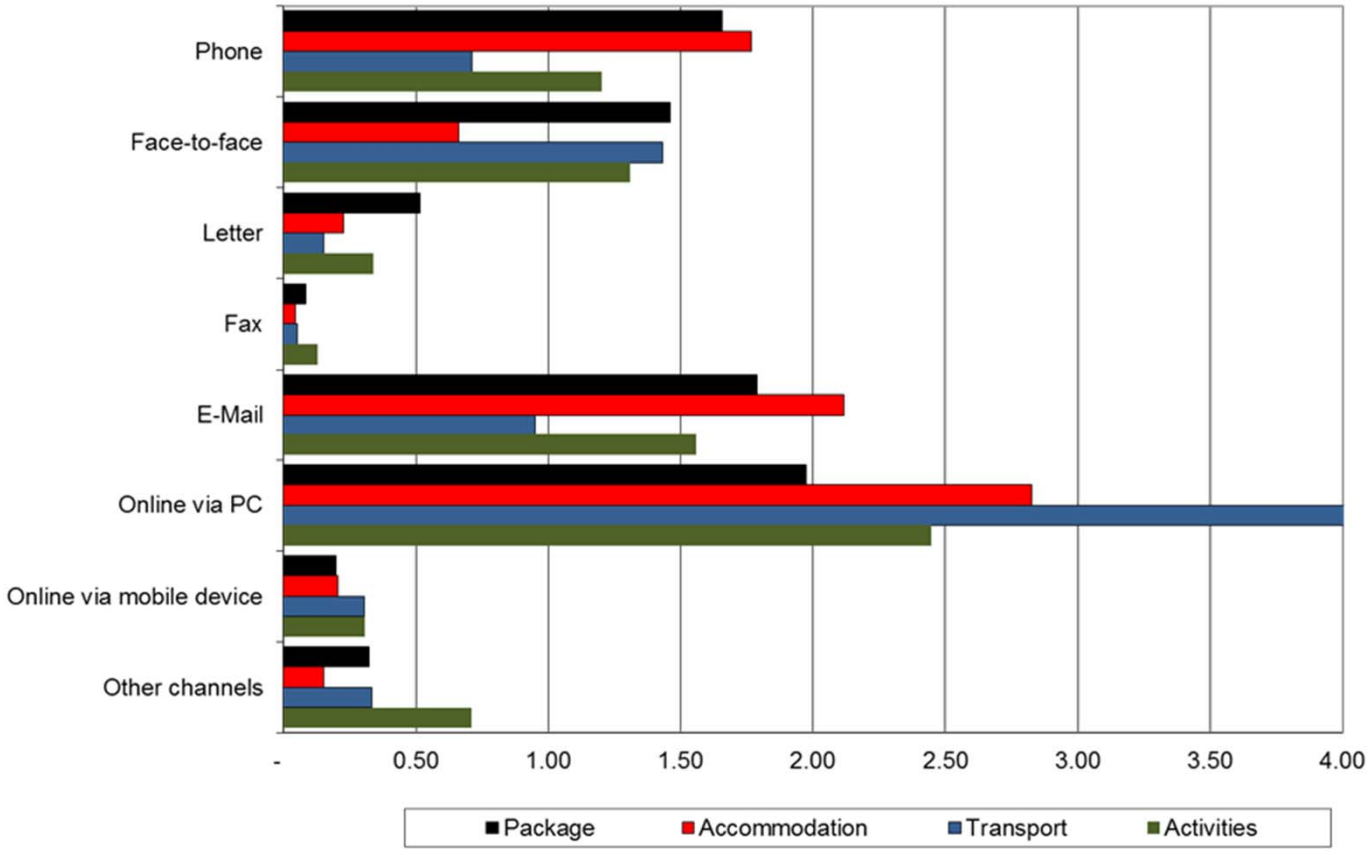
Travel motivation magnitude differences (1+ overnights)

Travel motivation factors	2007	2012	Difference 2011/12 - 2007
Regeneration from daily home routine and job	1.10	1.39	0.29
Experience landscape and nature	1.10	1.36	0.26
Get away from it all (daily routine)	1.22	1.34	0.12
Enjoy good food and beverages		1.32	1.32
Rest and relaxation	1.06	1.31	0.25
Time for family	1.10	1.30	0.19
Time for myself	1.07	1.28	0.21
Time for partner	1.11	1.26	0.14
Diversion; see and experience something new	1.27	1.19	-0.08
Visit sights and broaden one's horizon	0.97	1.11	0.14
Comfort, Pampering	1.25	1.09	-0.16
Ability to make flexible, spontaneous decisions	1.01	1.09	0.08
Liberation from obligations (and relationships)	1.15	1.07	-0.08
Sports	0.89	0.97	0.08
Experience of native culture and nature	0.87	0.95	0.08
Sun and Beach	0.97	0.91	-0.06
Make contact with new people	0.87	0.90	0.03
Challenge and stimulate oneself	0.90	0.88	-0.02
Search for self esteem	0.84	0.73	-0.11
Do something for my beauty	0.81	0.72	-0.09
Enjoy nightlife	0.90	0.71	-0.19
Experience adventure and perhaps even risk	0.92	0.70	-0.22
Experience the exotic	0.87	0.69	-0.18
Prestigious character of trip	0.93	0.65	-0.28
Termination/conclusion of a phase in one's life	0.96	0.61	-0.35
Sexual and erotic experiences		0.60	0.60

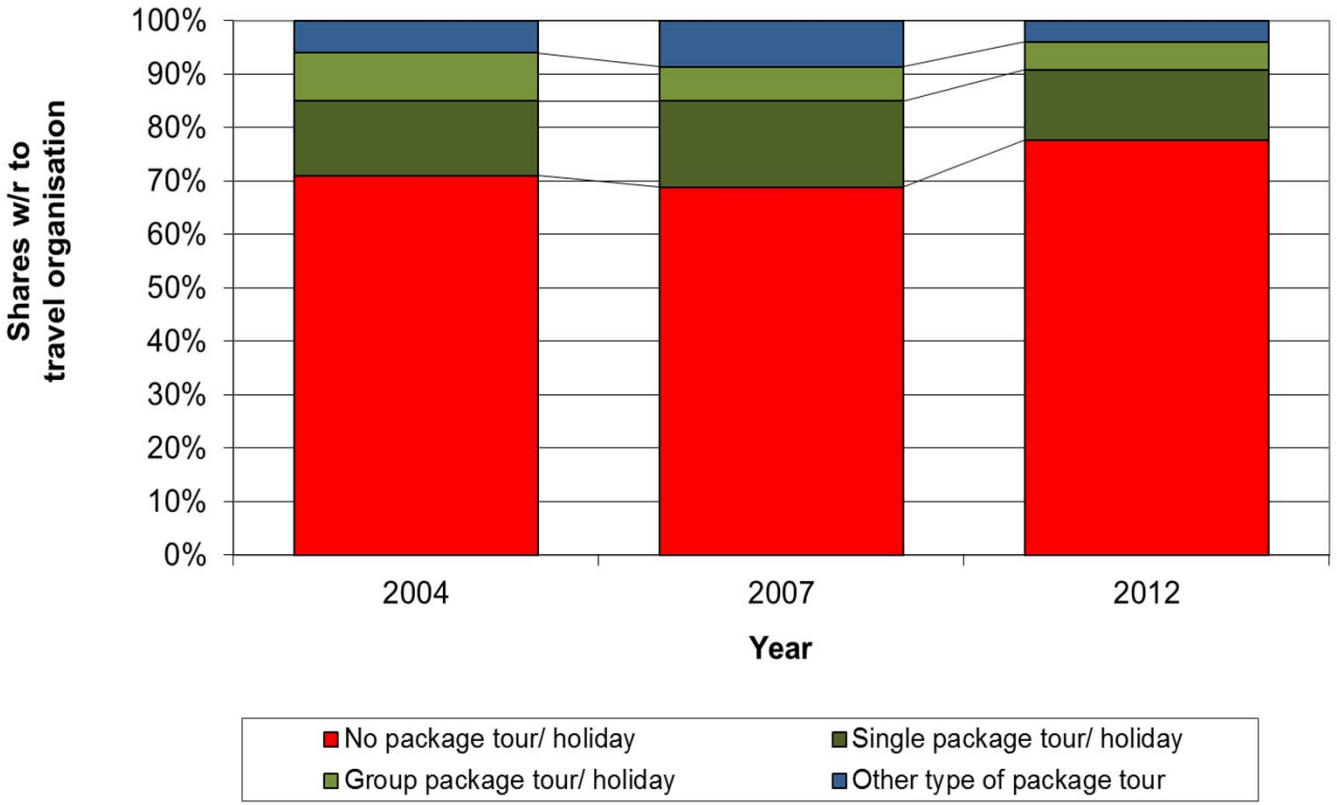
Sources of information (1+ overnights)



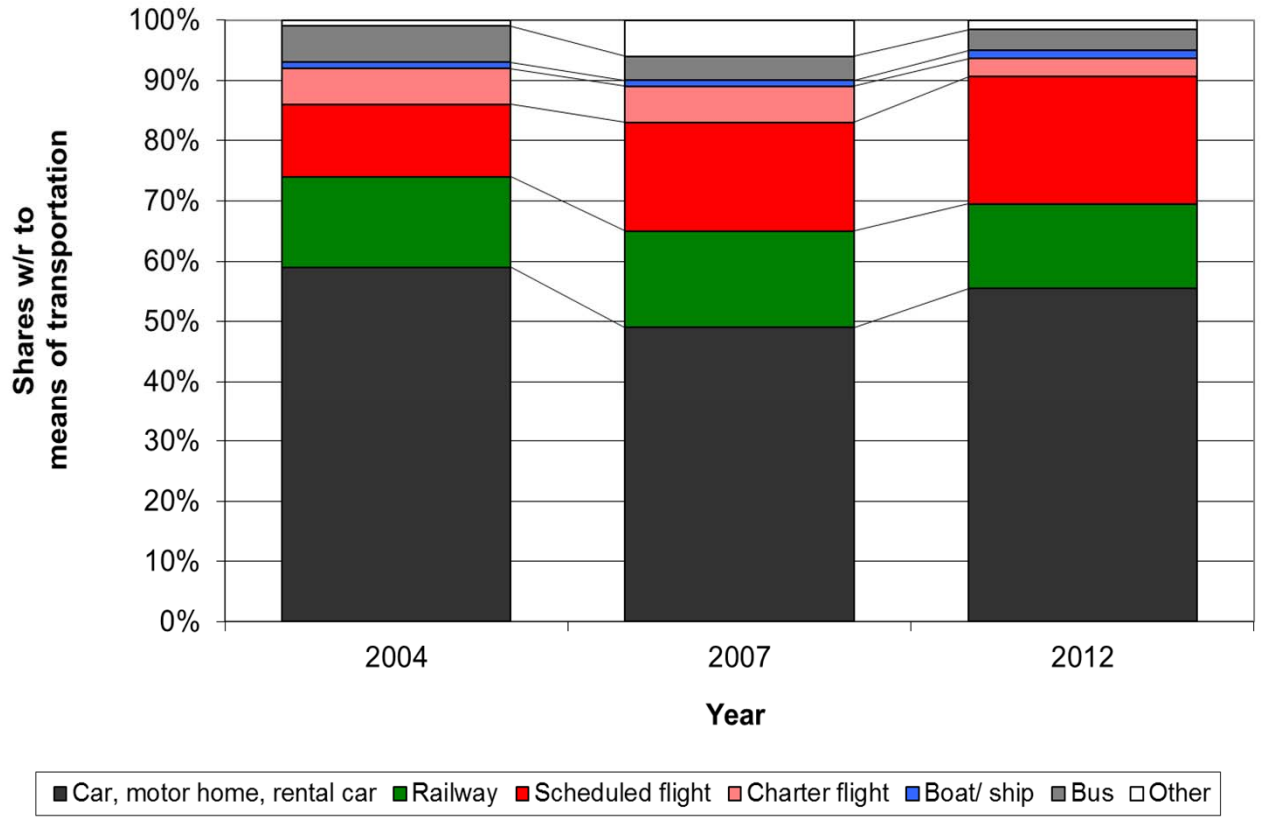
Booking Channels



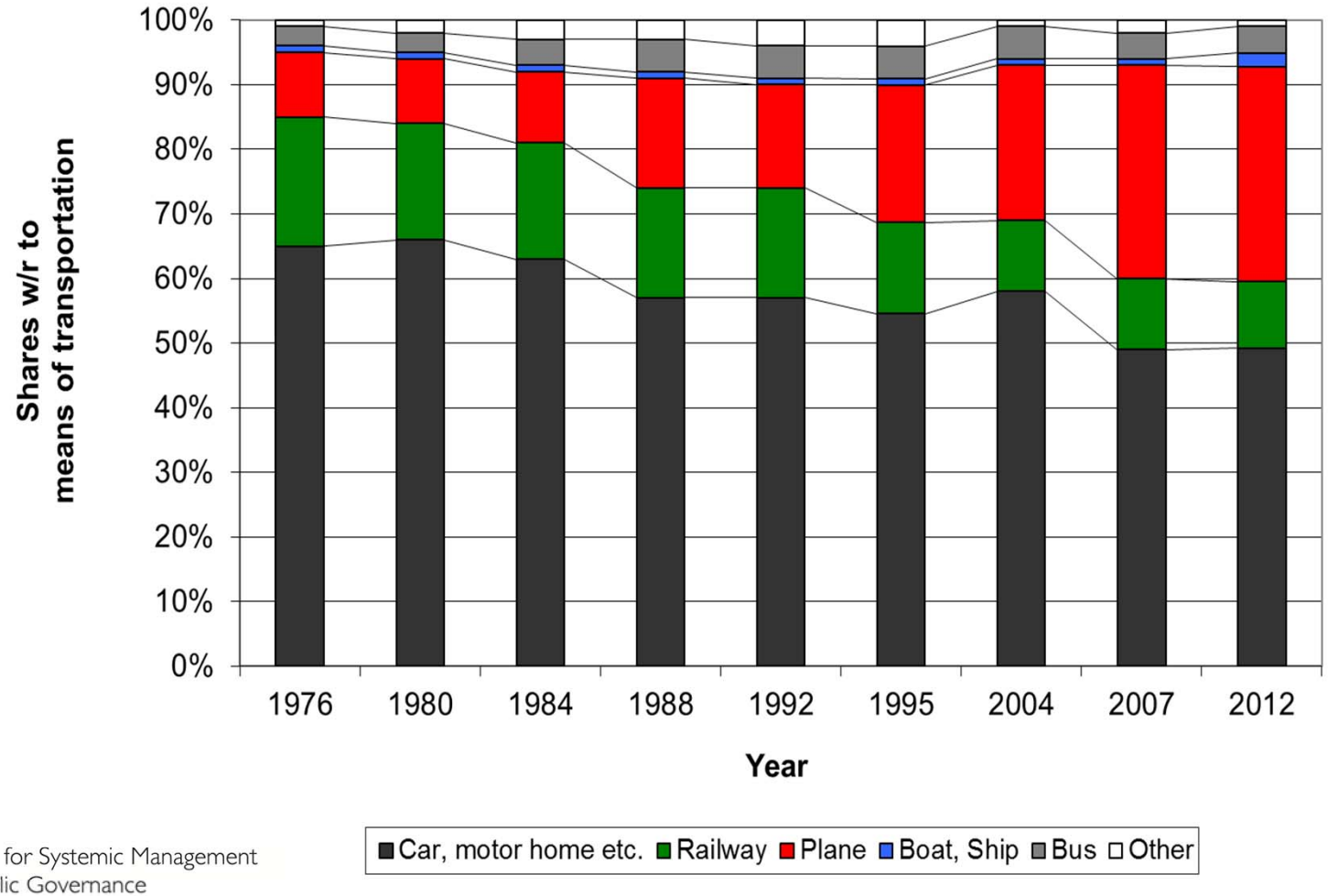
Organisation of trip (1+ overnights)



Transport to destination (1+ overnights)



Transport to destination (4+ overnights)



Choice of accommodation (1+ overnights)

