



Travel Market Switzerland 2004- Basic Report and Database Specification

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Content

- 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

Method, Sampling, Sample

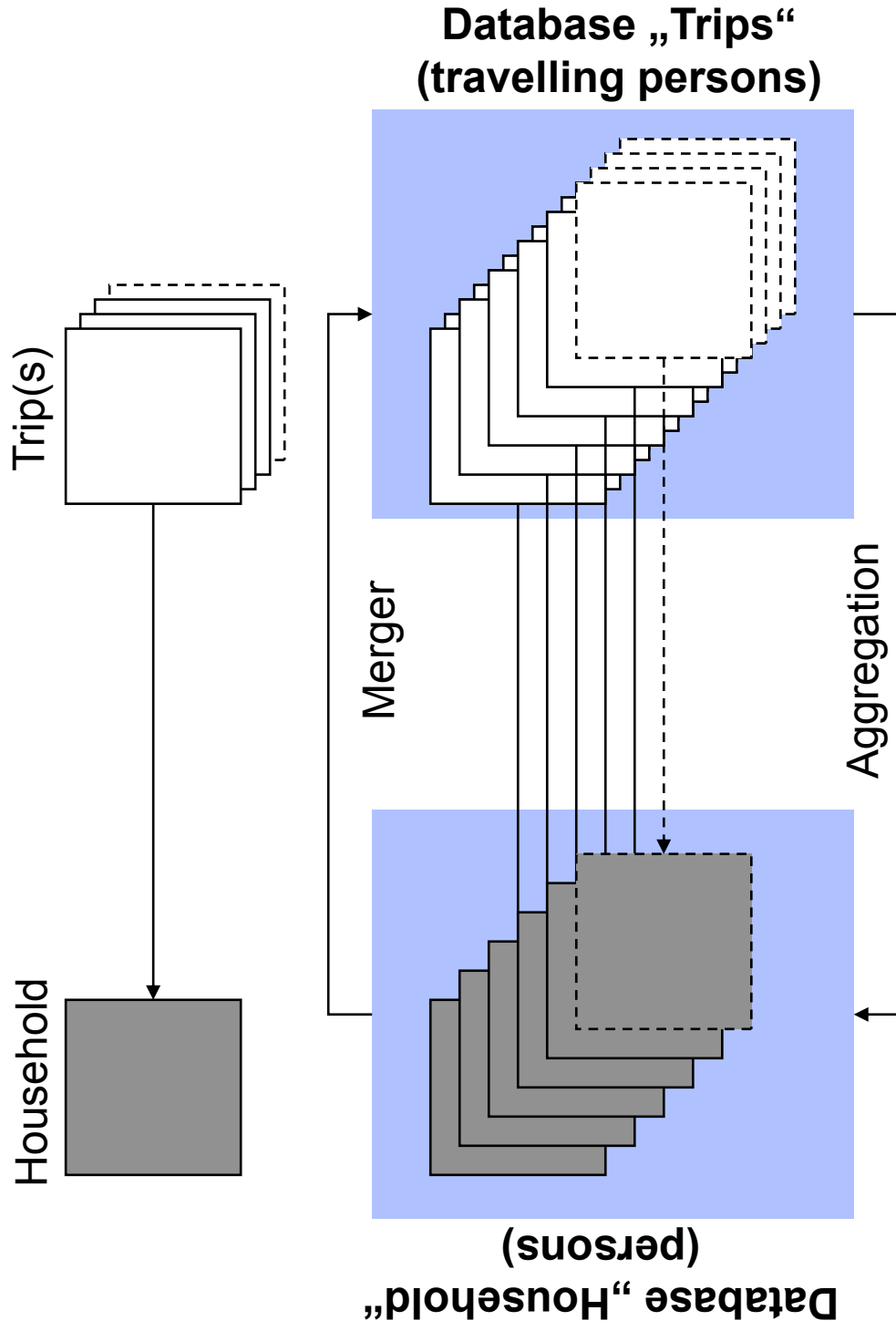
- **Method:** Self-administrated and structured written interviews of household, including the examination of
 - the households themselves
 - all trips made by their members
- **Sampling:** Representative sample of households, located in the German- and French-speaking part of Switzerland
- **Sample (non weighted):**
 - 1,898 households
 - 4,387 persons
 - 10,903 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)

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

Database rational of TMS



Key travel variables recorded 1

- 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
- Sources of information

Key travel variables recorded 2

- Travel decision structure (pro Destination vs. pro activity)
- Degree of packaging and time of booking
- Means of transportation to destination
- Means of transportation in destination
- Type of accommodation
- Sports activities
- 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
 - the economic prosperity and
 - favourable outlook during large parts of reporting year;
- the **duration of trips**, most trips last now less than one week. The "classic" two week trip is more than ever challenged by shorter as well as longer lasting trips;
- the **choice of destination**, Switzerland remains the favourite destination. However, non-neighbouring countries in Europe as well as overseas destinations have achieved considerable market share increases;
- the **month of departure**, July remains the strongest month. Additionally, more than half of all travel take place between March and July. However, there are meandering market shares with regard to spring and fall;

Results overview

With regard to...

- **travel motivation**, people want
 - to get pampered,
 - diverted/ entertained and
 - get rid of obligations.
 - Time issues are less dominant than in previous years, however still strong;
- **sources of information**, there is a tripartite of major sources of information, consisting of
 - the web,
 - friends and relatives, and
 - destination brochures.
 - Occasionally (especially when travelling internationally), tour operator brochures as well as travel guides inhibit prominent position. However, and most importantly: The major source of information is *previous experience*;

Results overview

With regard to...

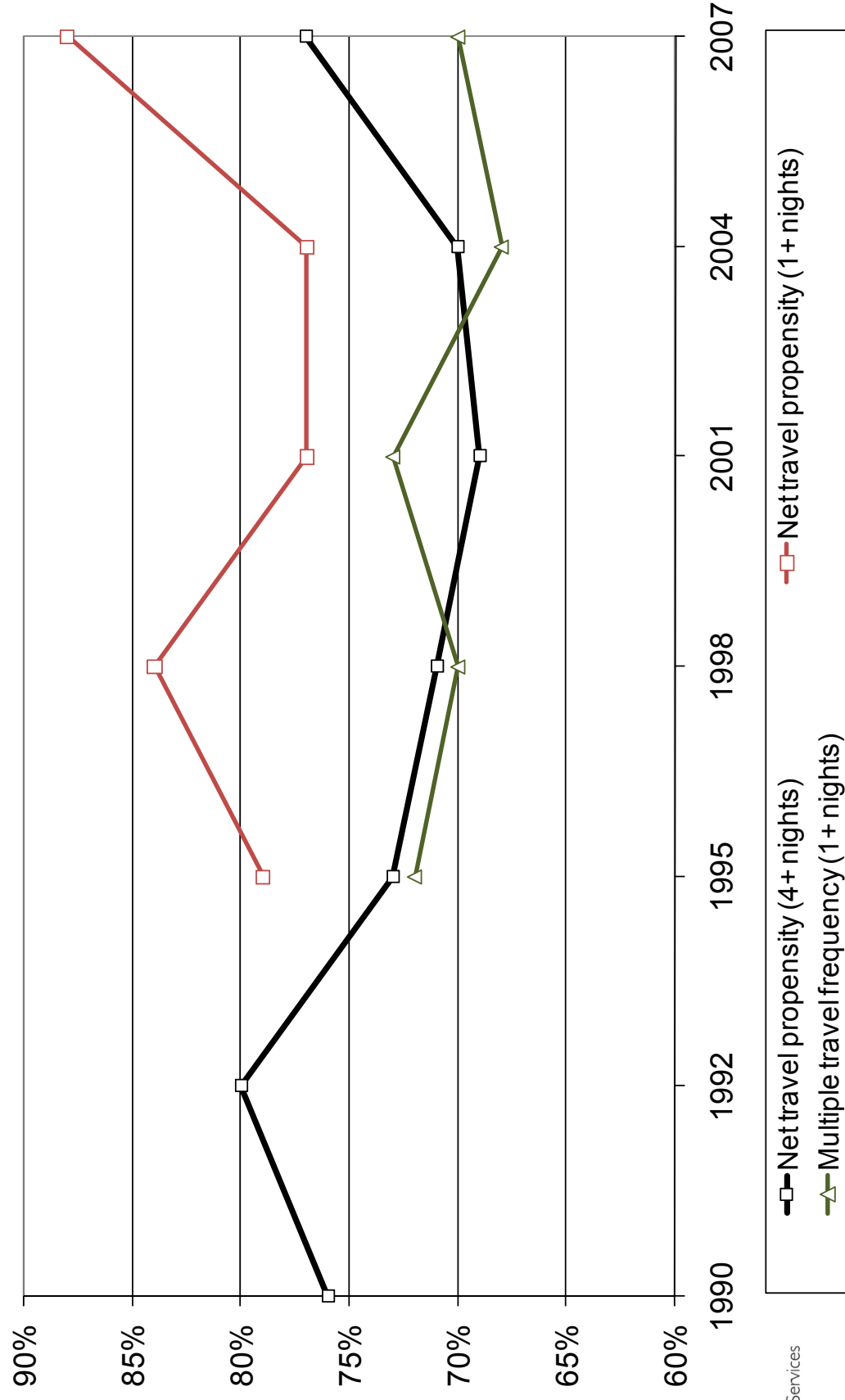
- **modes of transport**, 2007 has been the year of the planes, with flying as mode of transport gaining the highest market share ever. Cars have been losing market shares, mainly due to the choice of destination. Trains have again continuously lost market shares;
- **type of accommodation**, the hotel industry in general and 4-star and 5-star hotels in particular have gained 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 2007 has led
 - to an increased travel activity,
 - which generated above average demand for long haul travel
 - and thus flights as well as hotel accommodation.
- At least in this year,
 - the overall trend of stagnation has been interrupted;
 - however it is uncertain if it has been broken, bearing in mind the less favourable economic outlook for the time to come.

Travel propensities overview



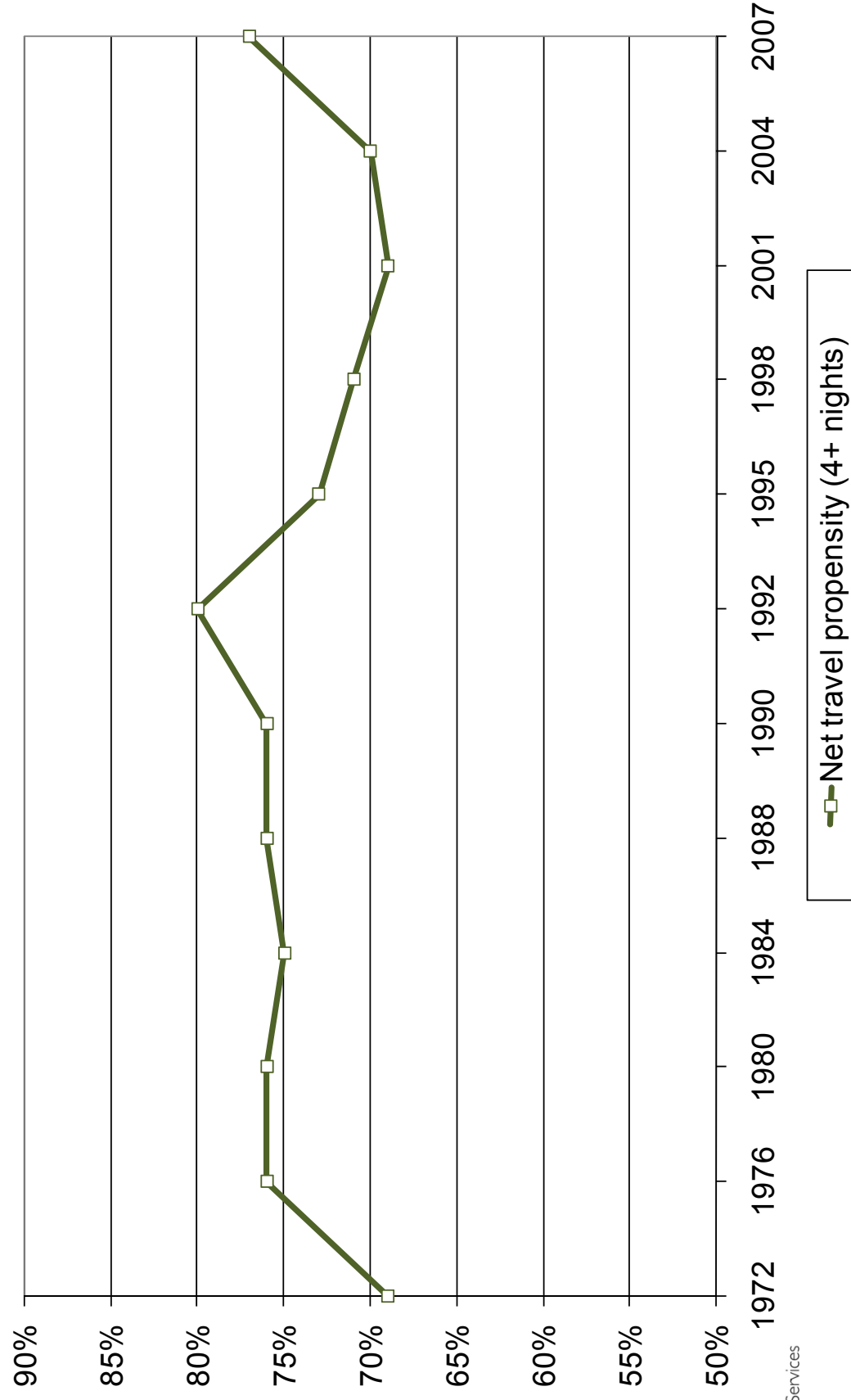
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Net travel propensity with regard to trips with 4+ overnight stays

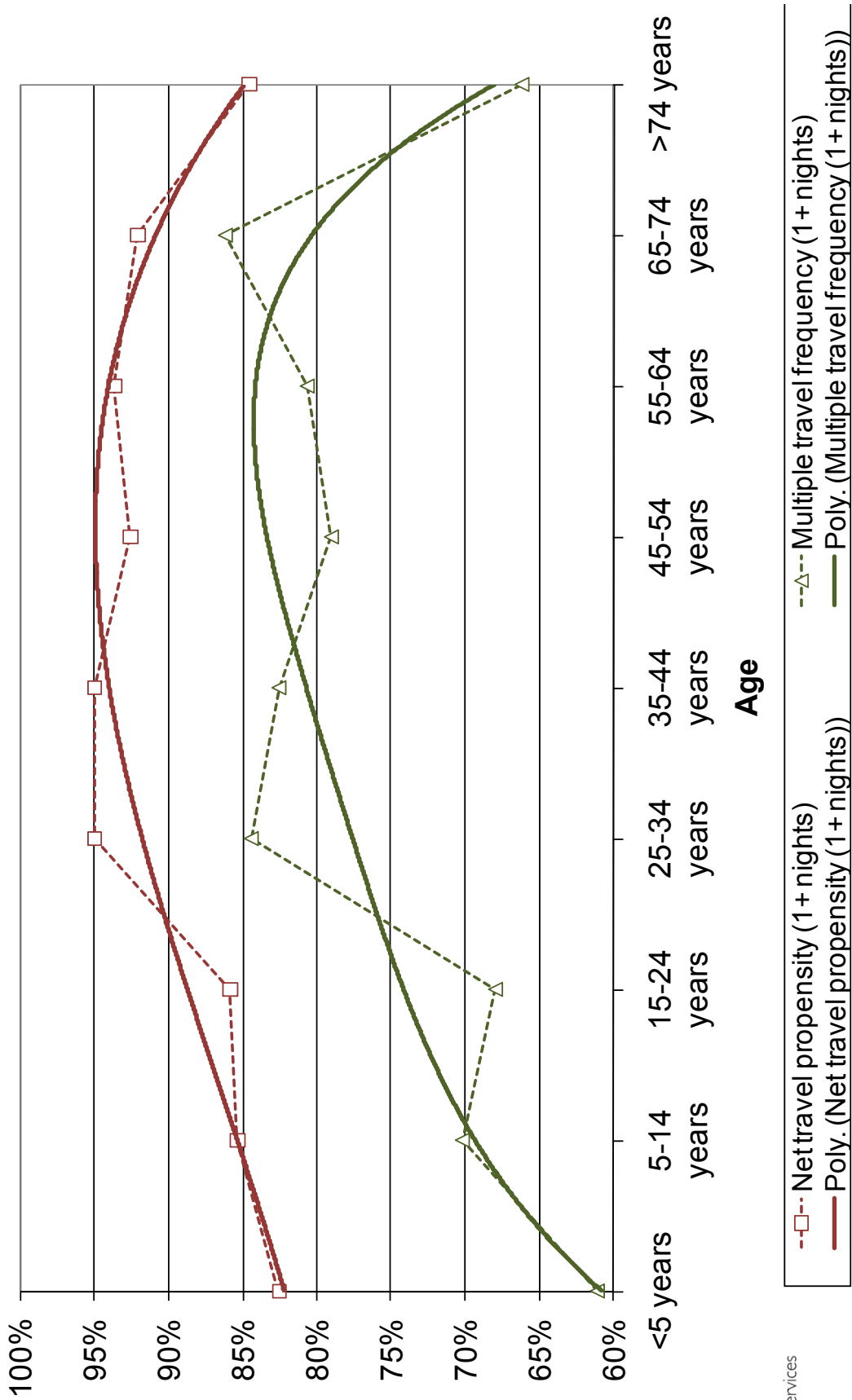


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Net travel propensities and travel frequencies by age

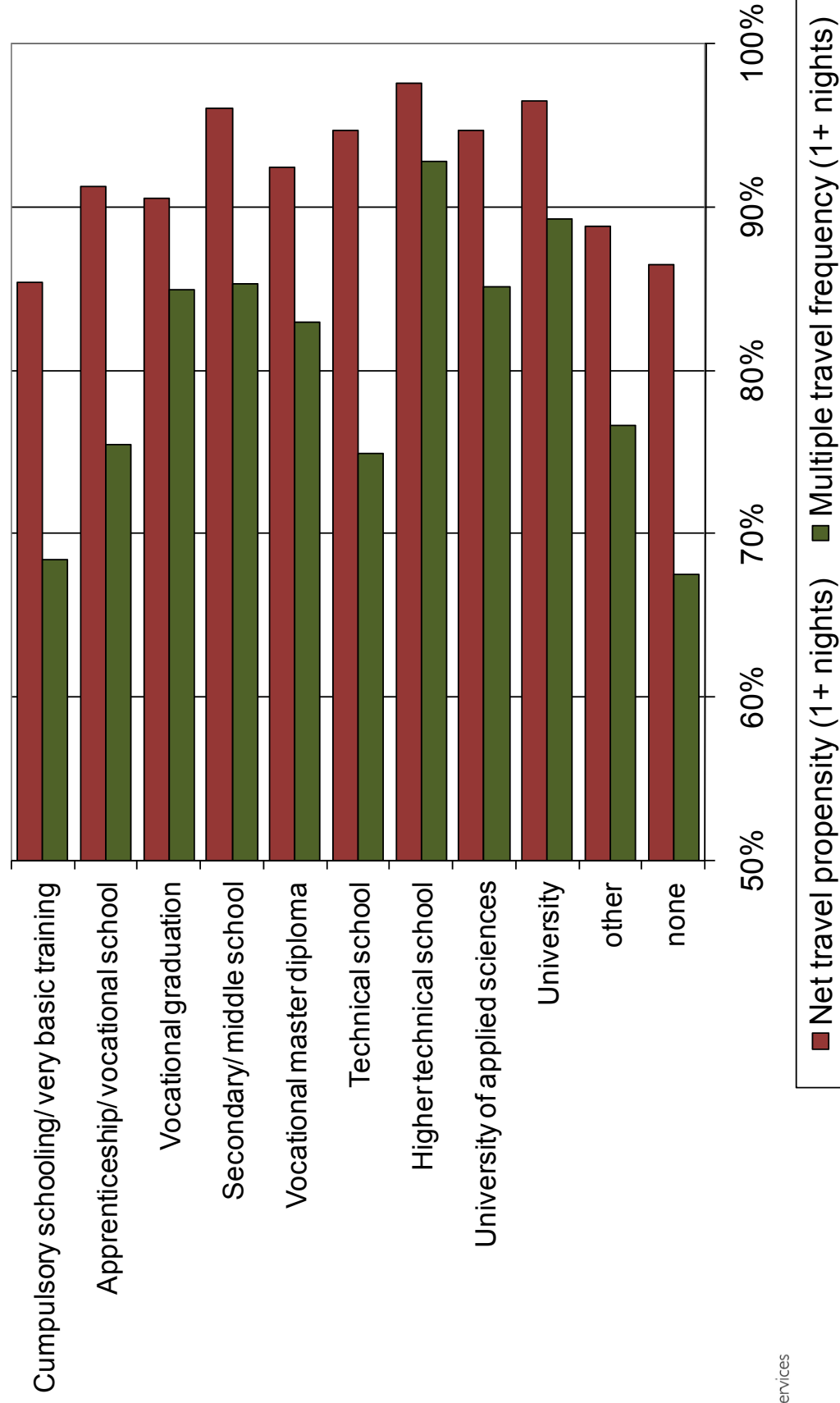


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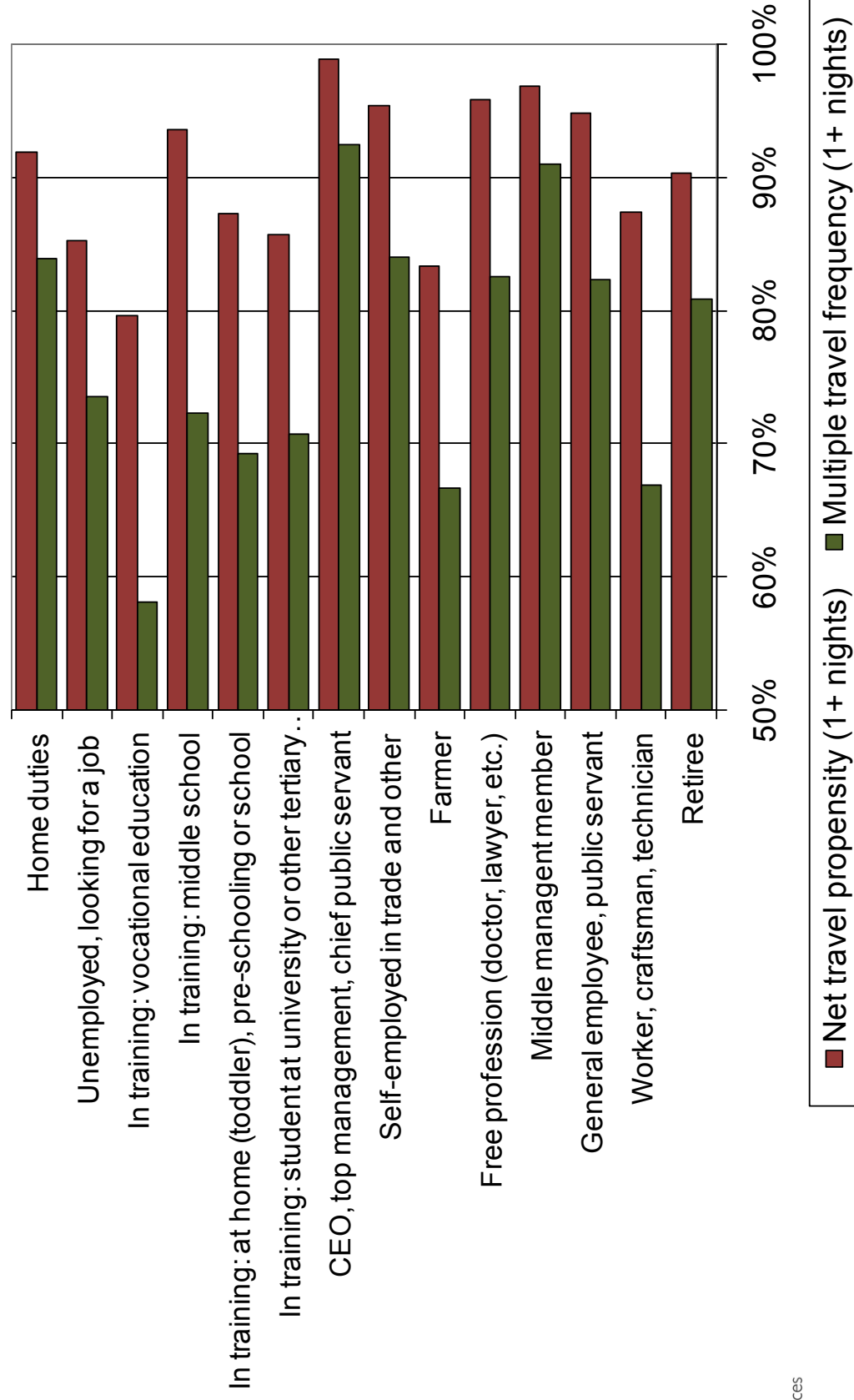


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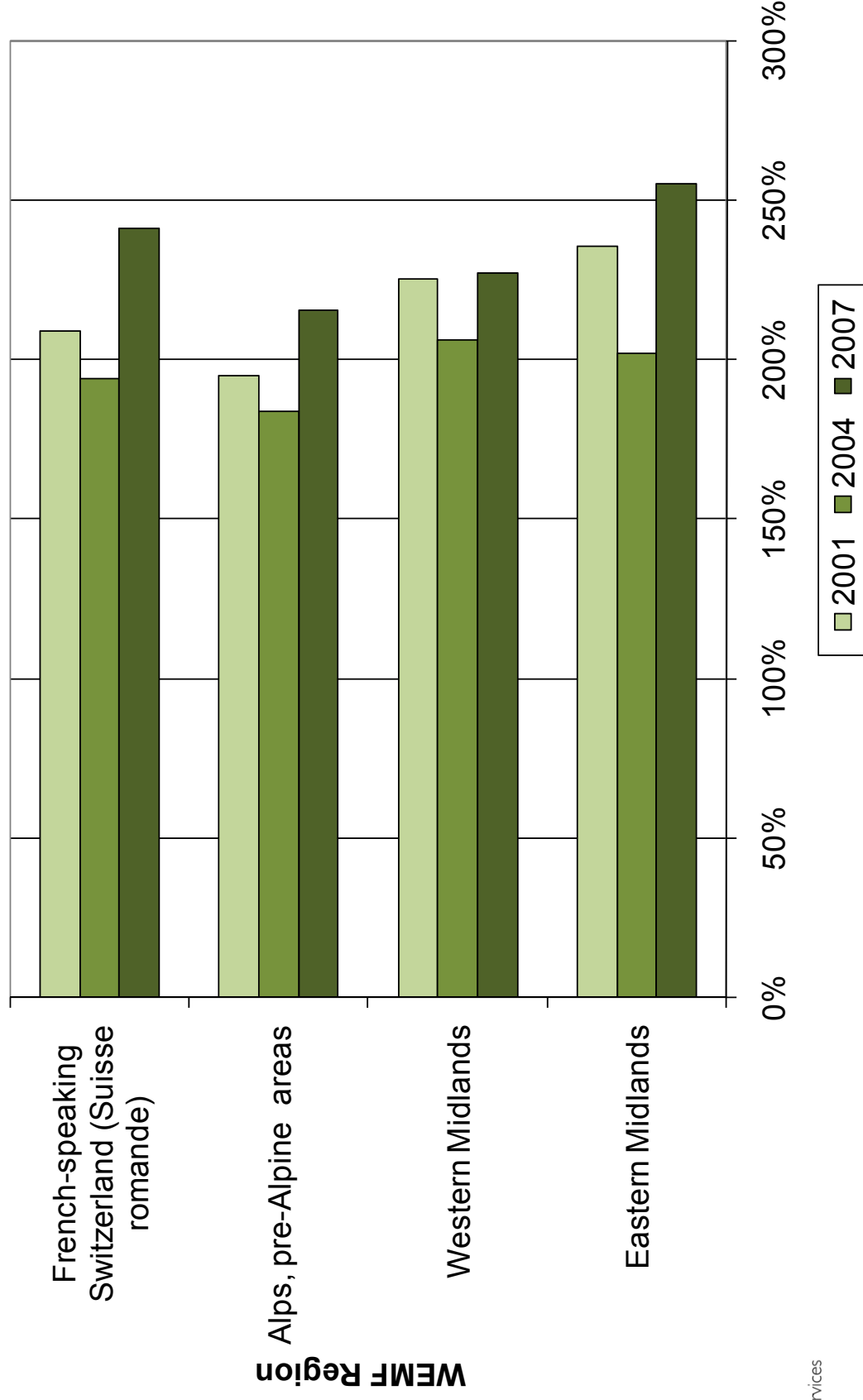
Net travel propensities and travel frequencies by terminal education



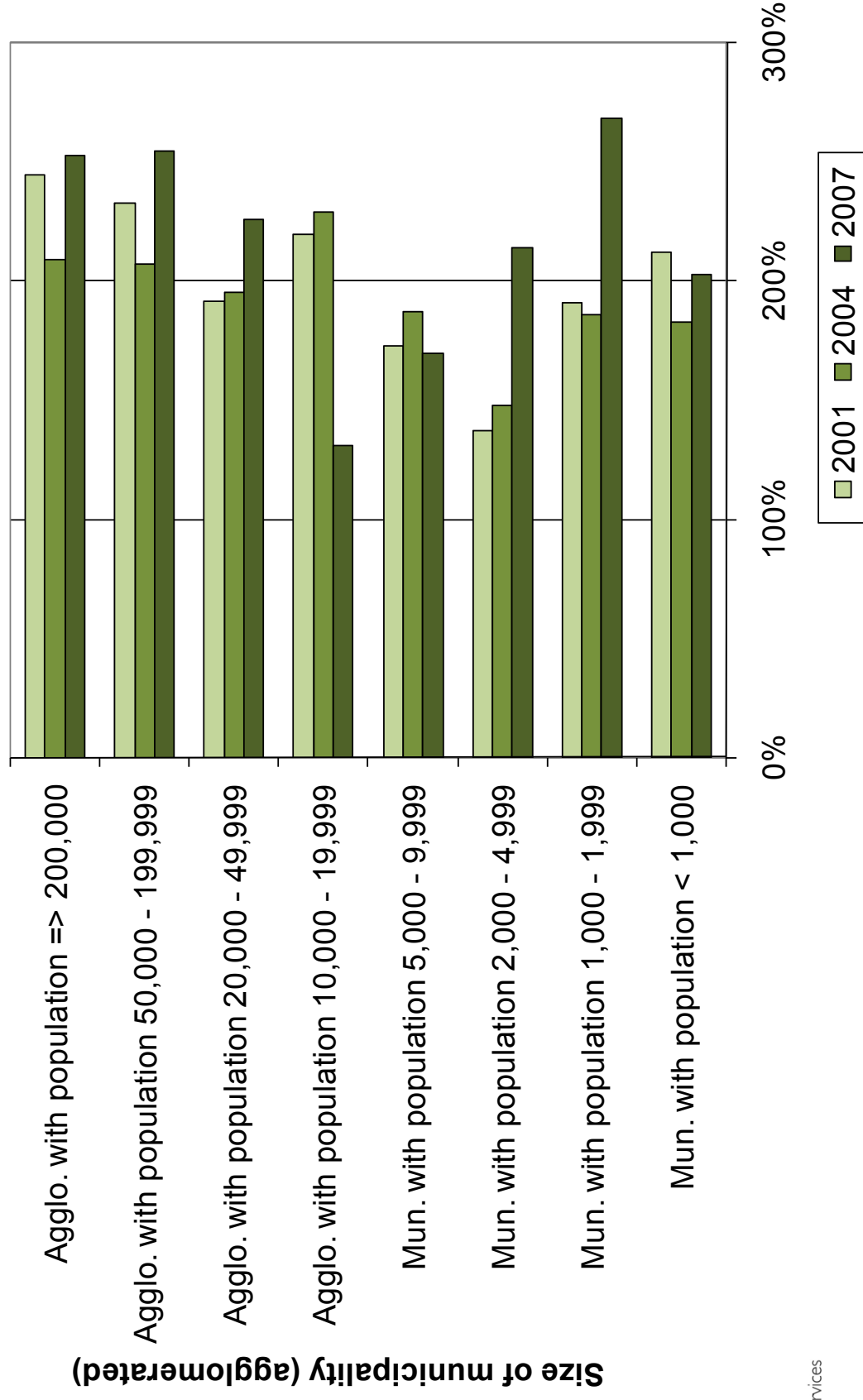
Net travel propensities and travel frequencies by professional position



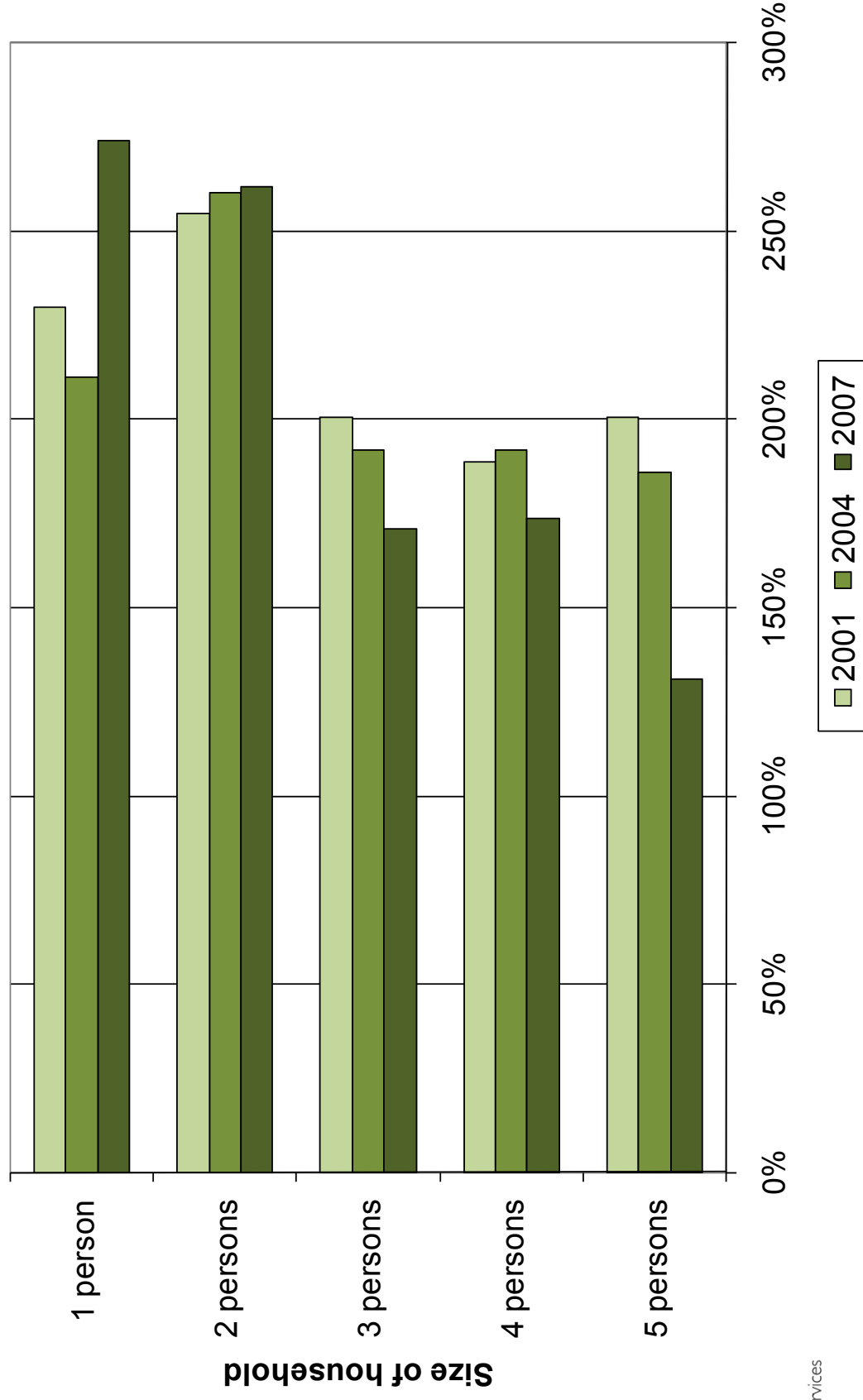
Gross travel propensity by WEMF region (1+ overnights)



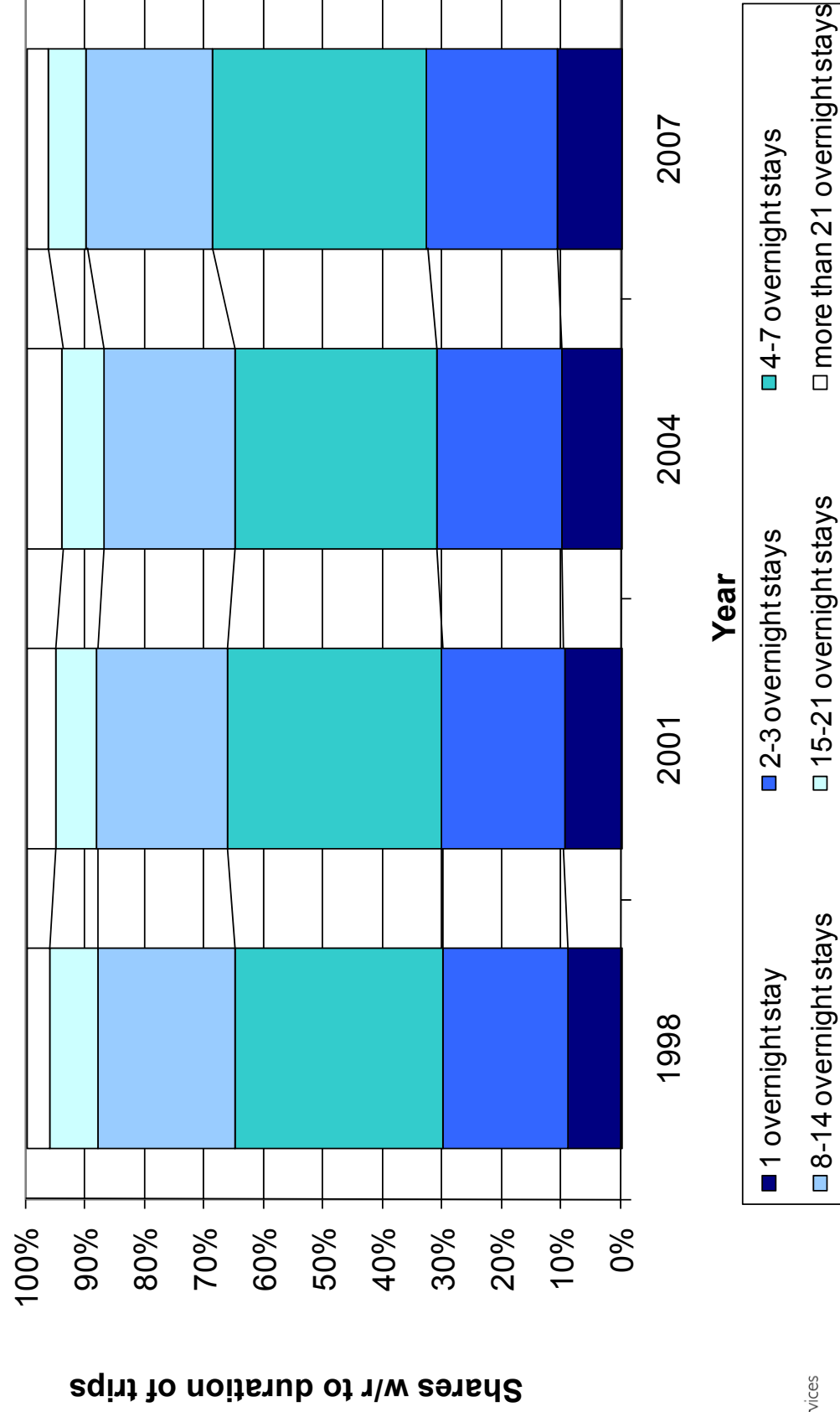
Gross travel propensity by size of municipality (1+ overnights)



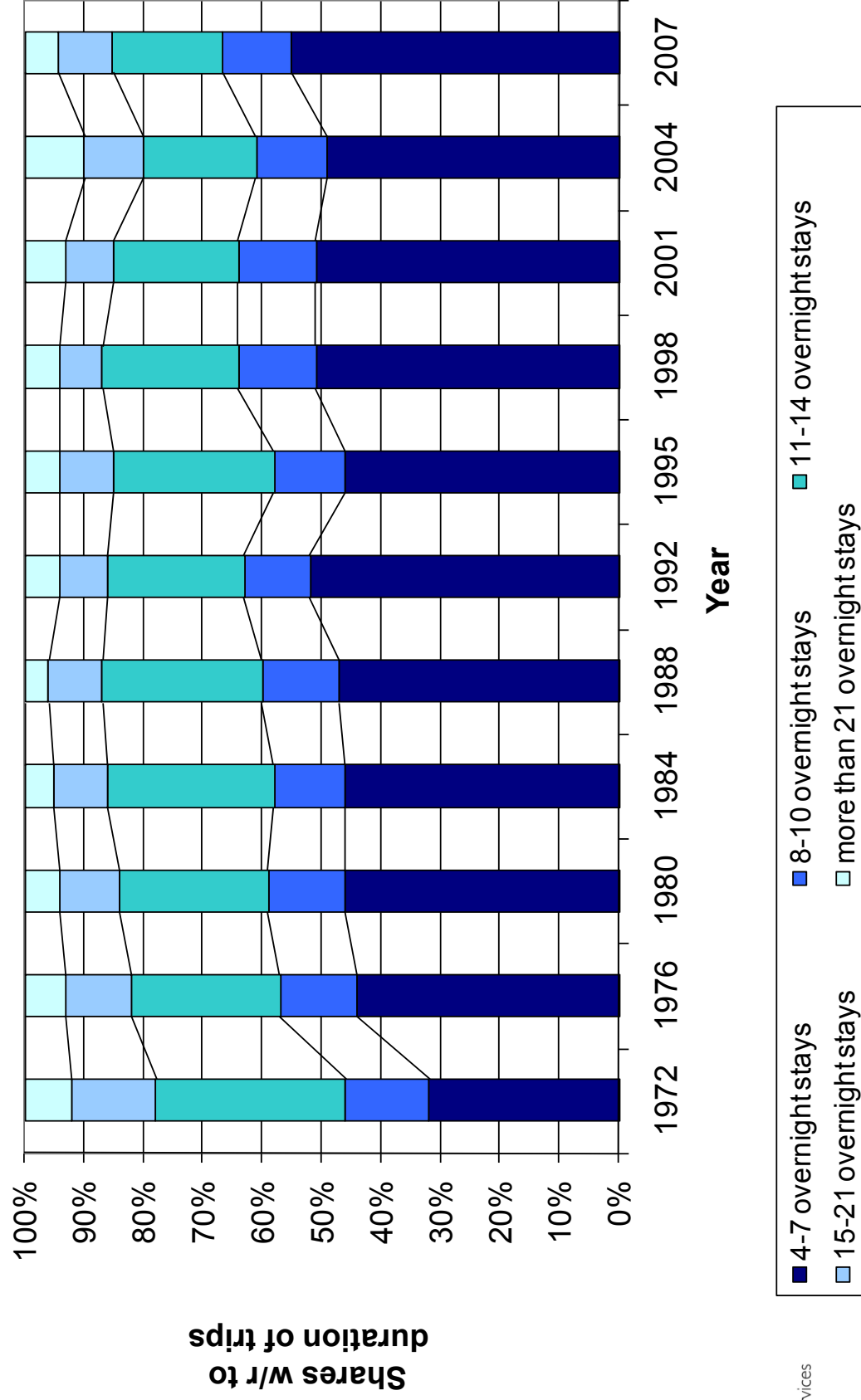
Gross travel propensity by size of household (1+ overnights)



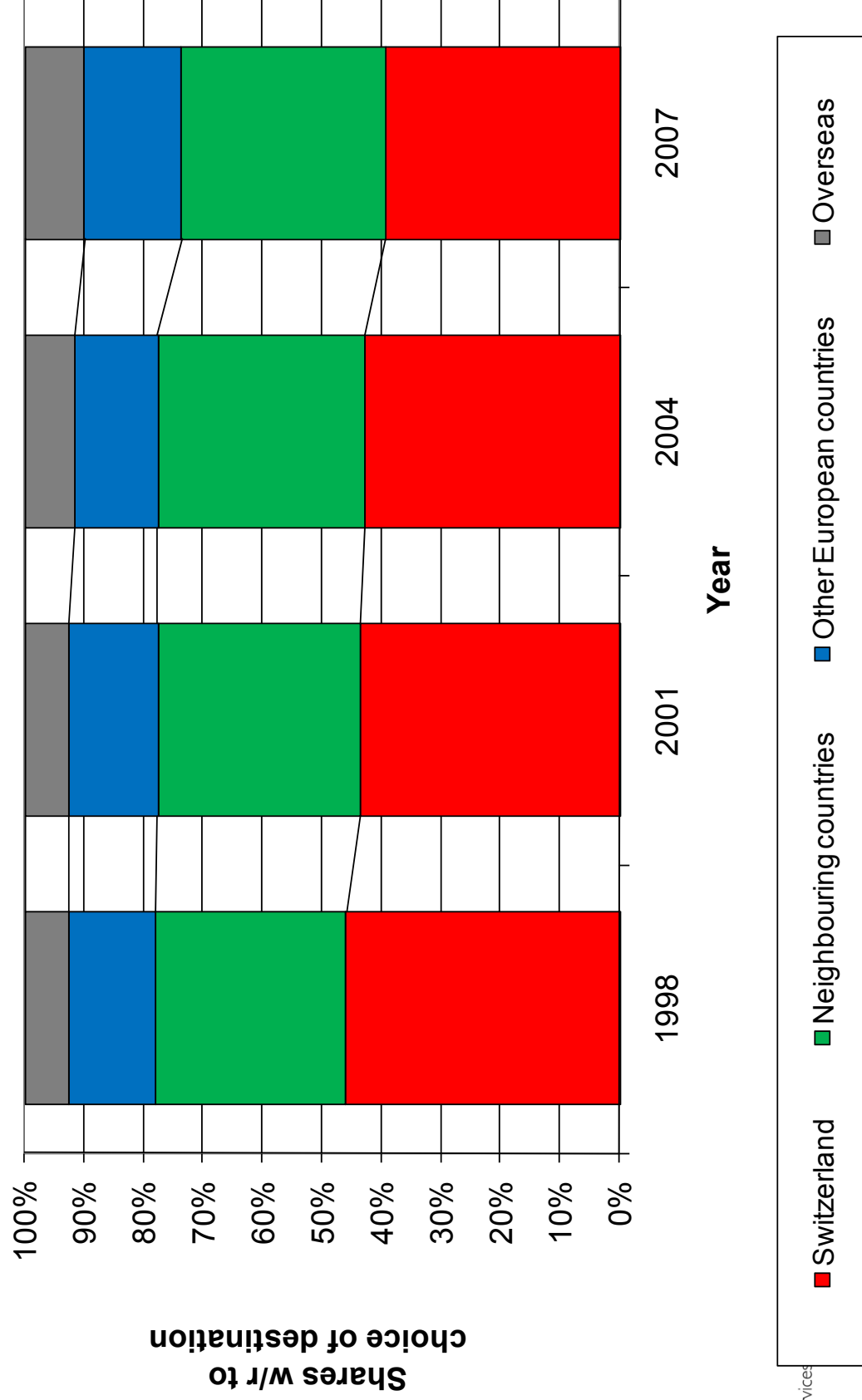
Duration of trip (1+ overnights)



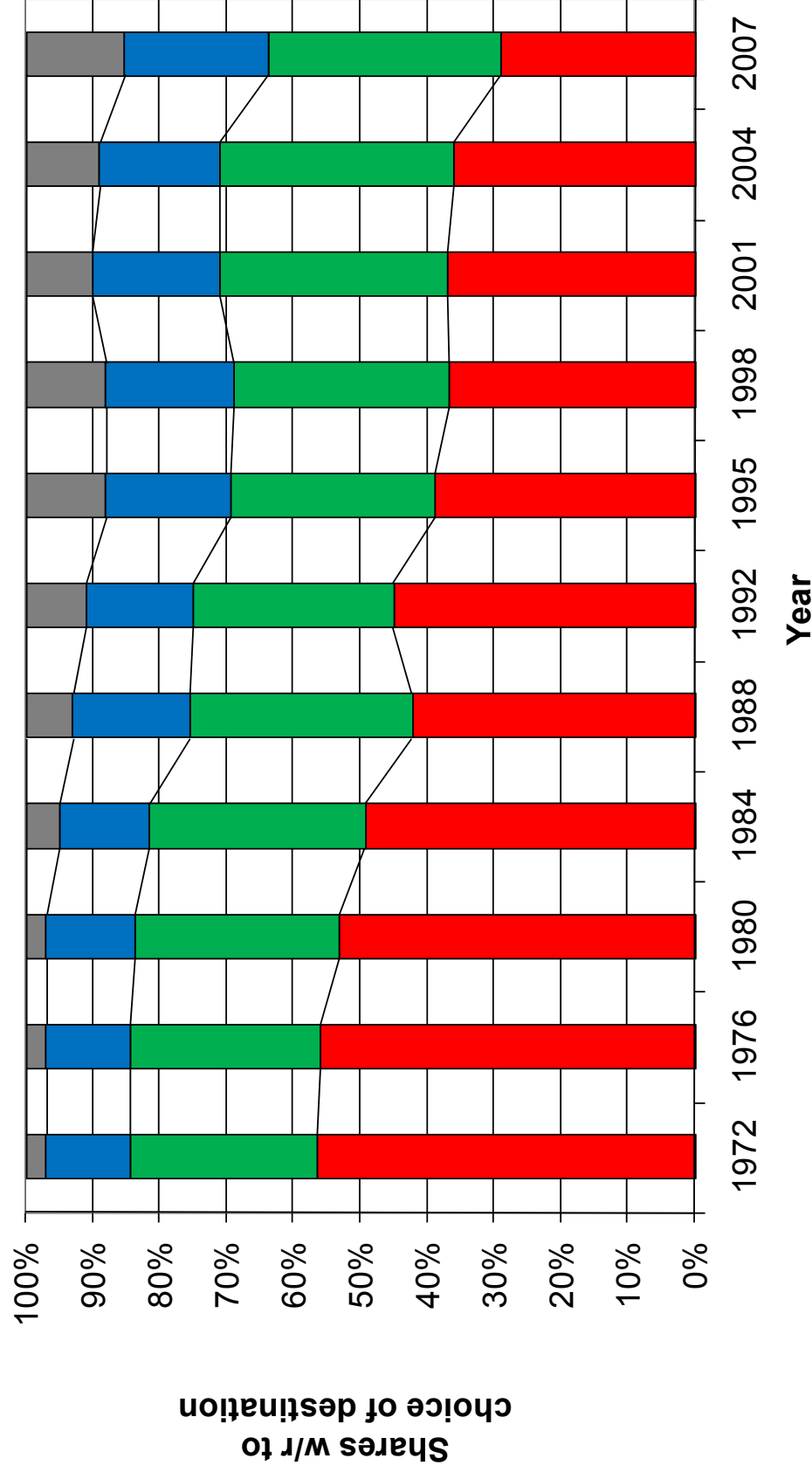
Duration of trip (4+ overnights)



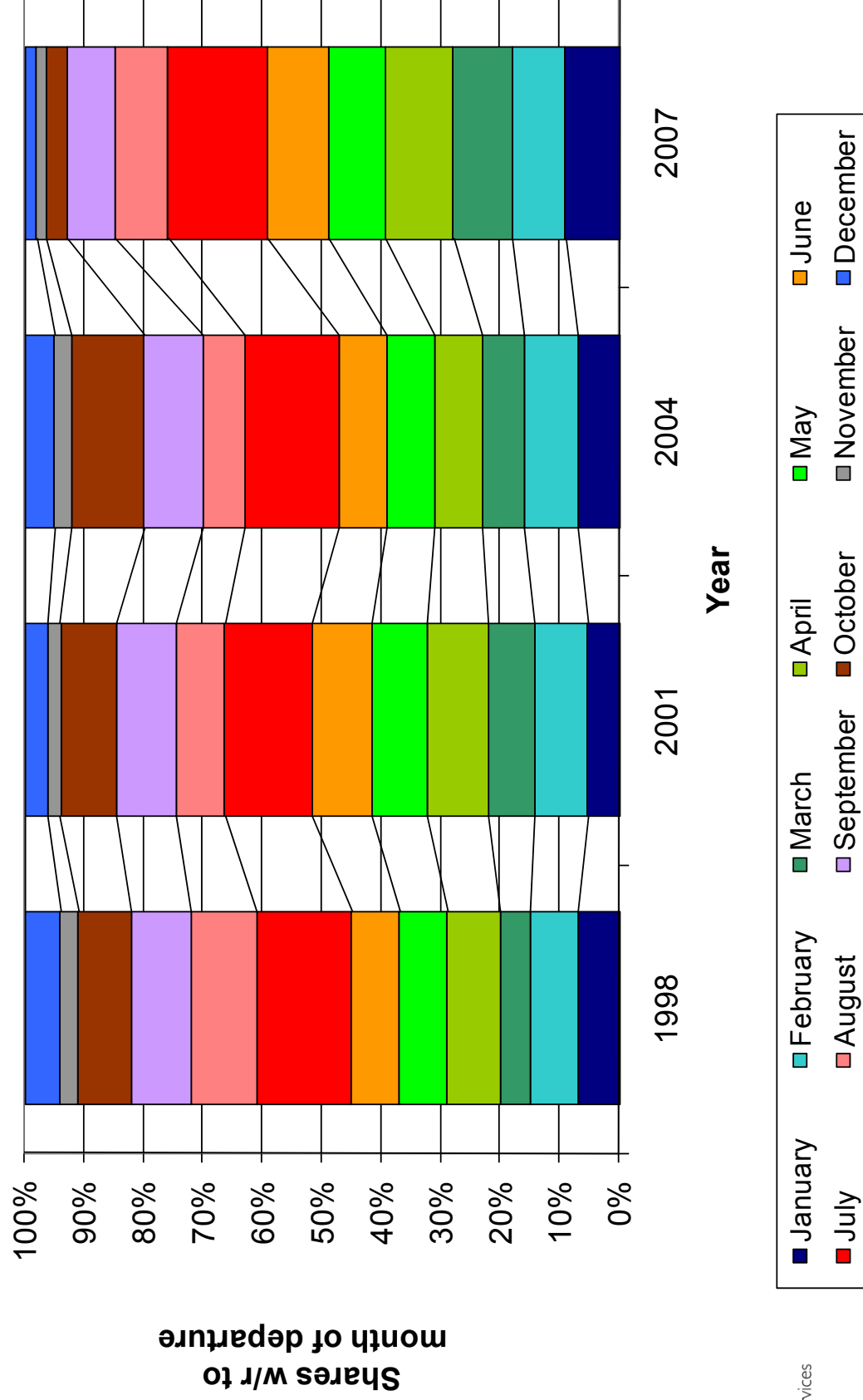
Choice of destination (1+ overnights)



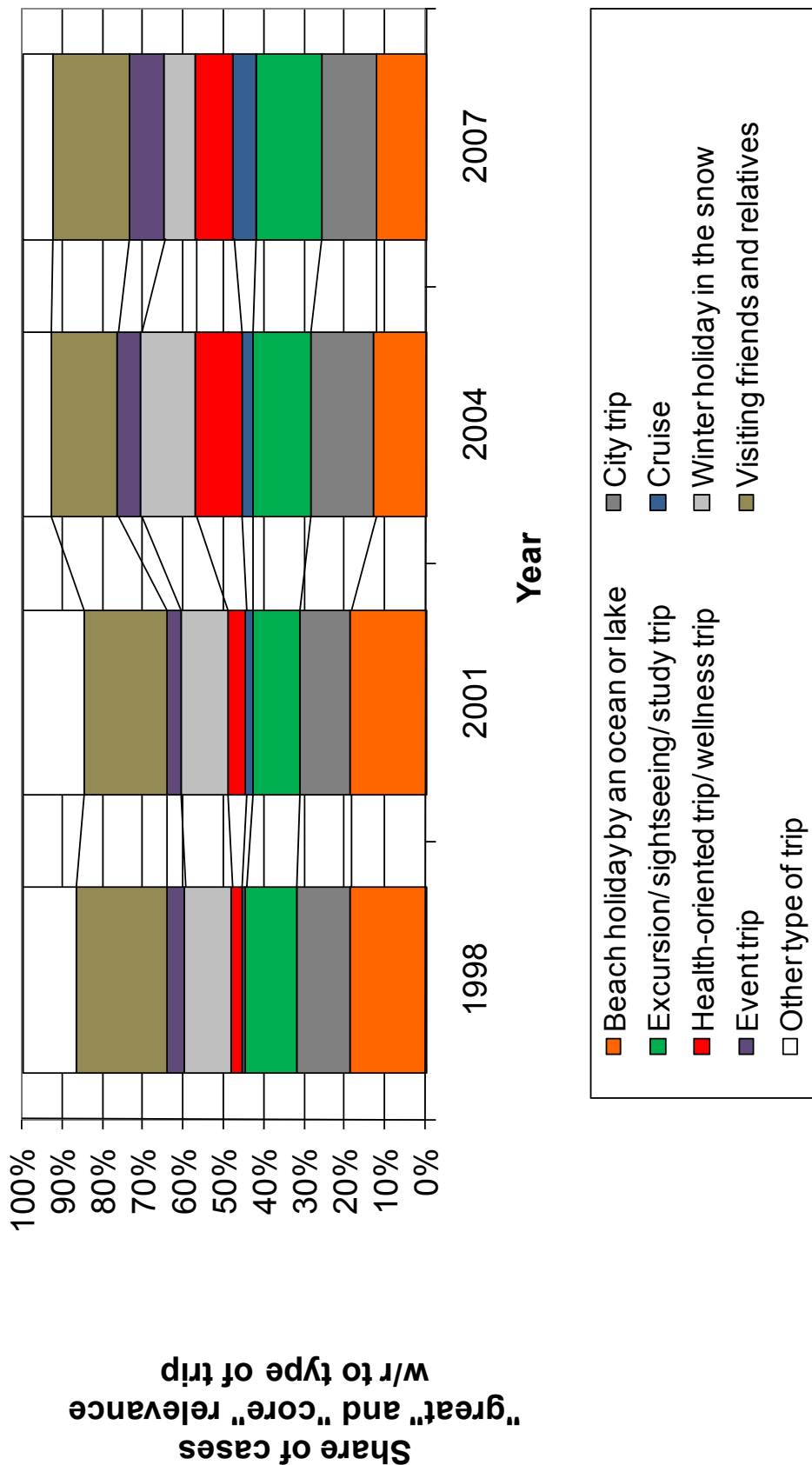
Choice of destination (4+ overnights)



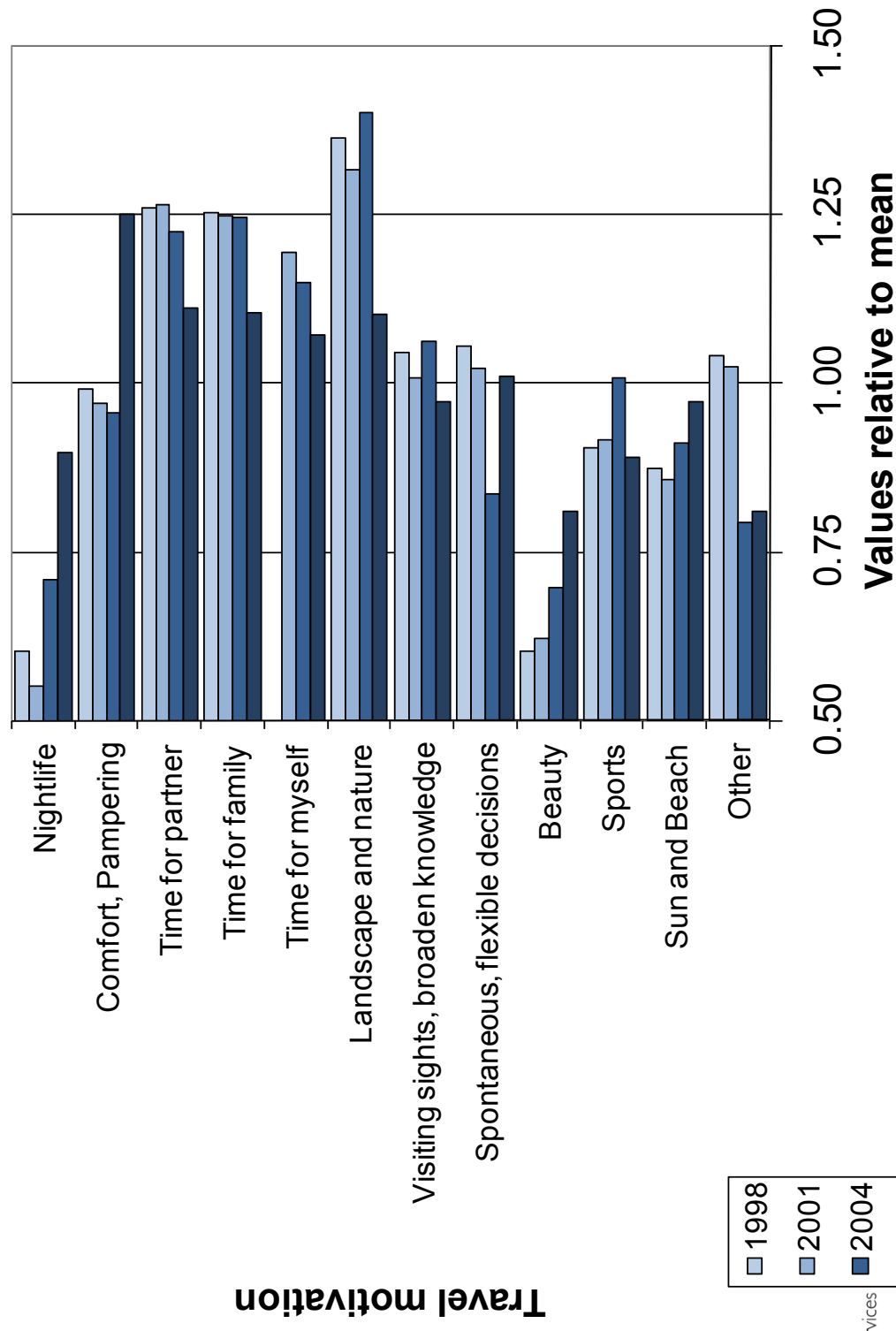
Month of departure (1+ overnights)



Type of trip (1+ overnights)



Travel motivation (1+ overnights)

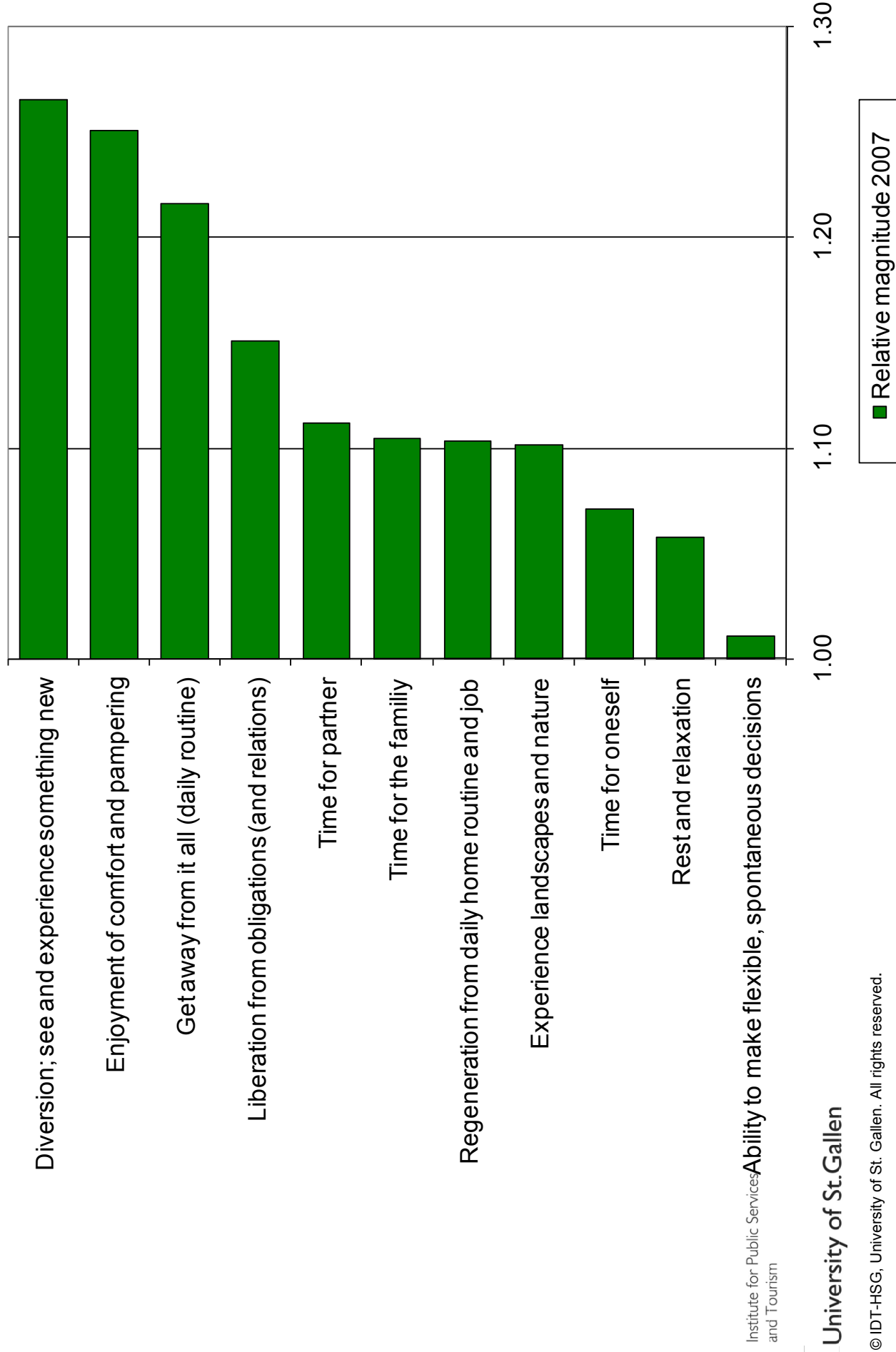


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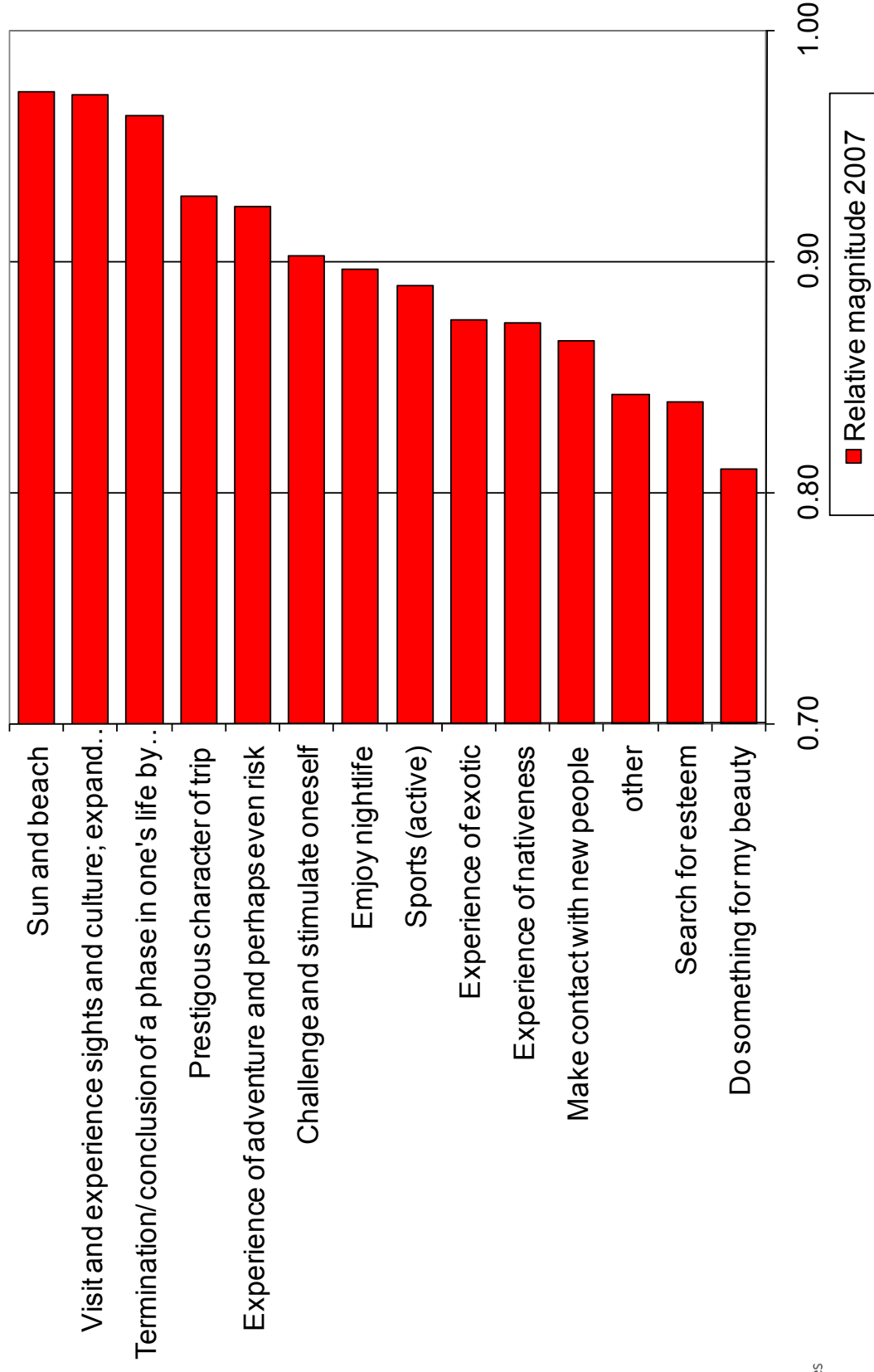


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Travel motivation (1+ overnights) (1)



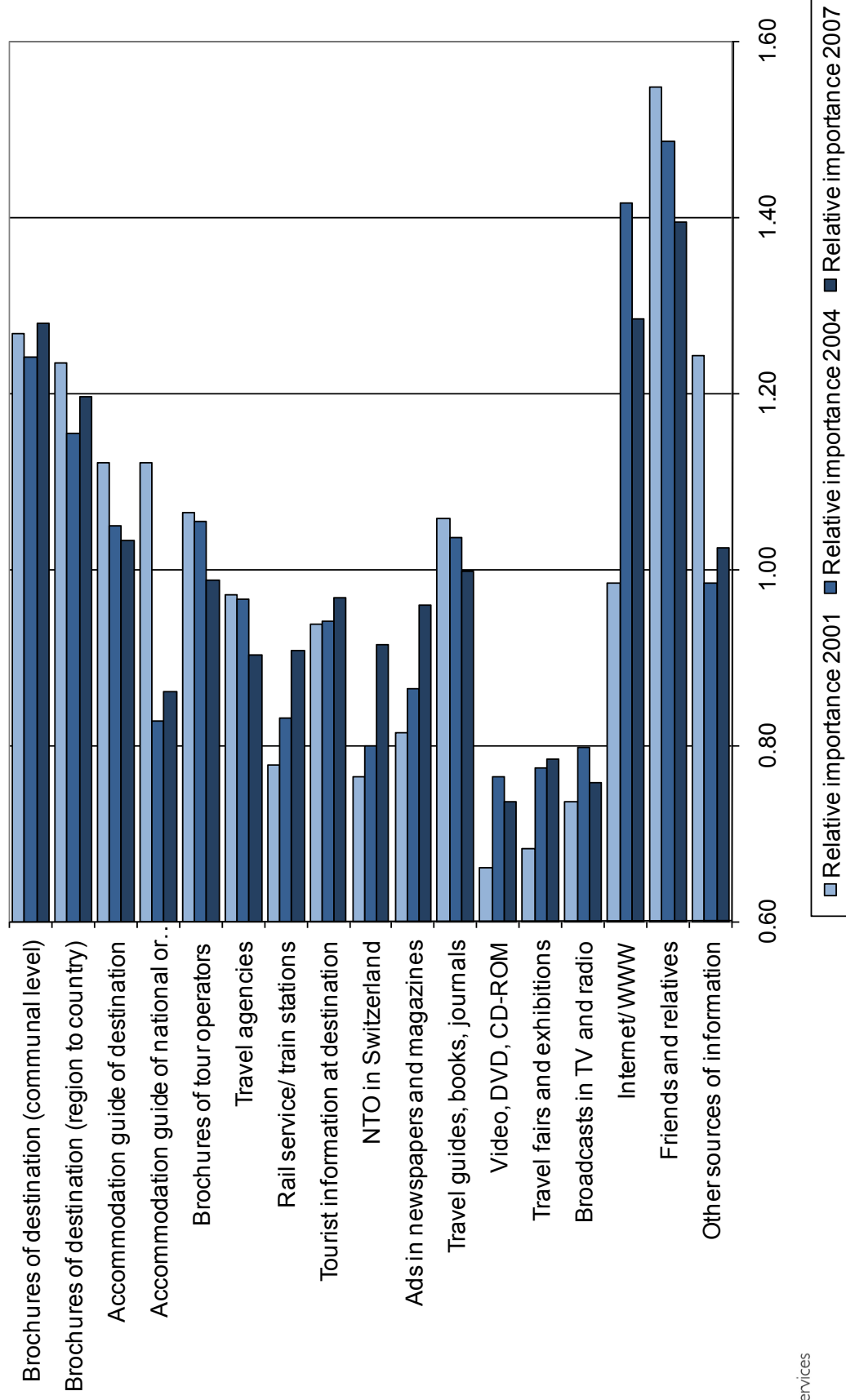
Travel motivation (1+ overnights) (2)



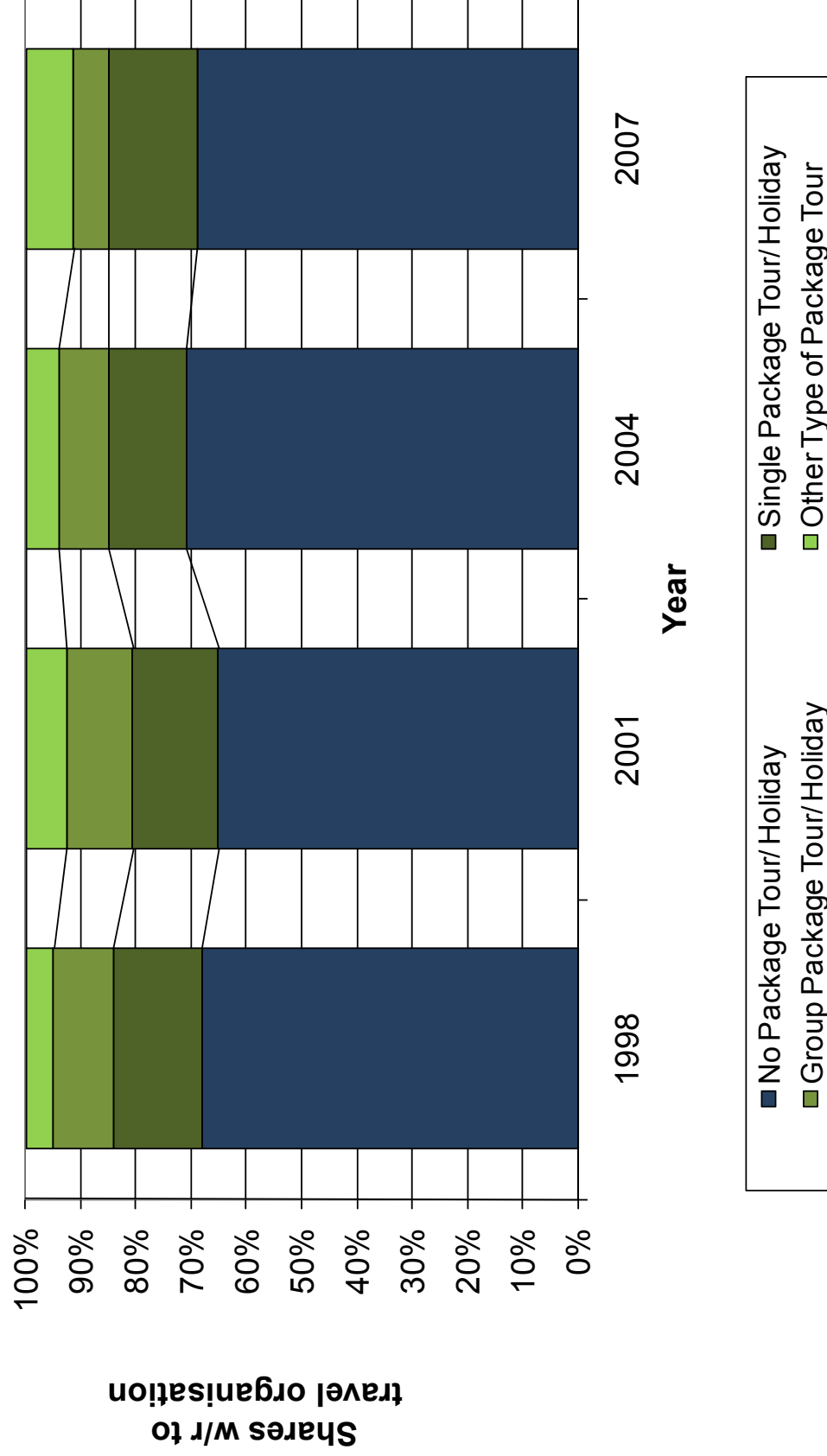
Travel motivation magnitude differences (1+ overnights)

Motivation	Relative magnitude 2004	Relative magnitude 2007	Difference 2007-2004
Diversion; see and experience something new	1.18	1.27	0.08
Get away from it all (daily routine)	1.44	1.22	-0.23
Liberation from obligations (and relations)	1.00	1.15	0.15
Visit and experience sights and culture; expand own horizon	1.11	0.97	-0.14
Termination/ conclusion of a phase in one's life	0.73	0.96	0.23
Rest and relaxation	1.44	1.06	-0.39
Do something for my beauty	0.75	0.81	0.06
Experience of exotic	0.77	0.87	0.10
Ability to make flexible, spontaneous decisions	0.90	1.01	0.11
Enjoyment of comfort and pampering	0.95	1.25	0.30
Experience landscapes and nature	1.48	1.10	-0.37
Enjoy nightlife	0.77	0.90	0.12
Make contact with new people	0.91	0.87	-0.04
Prestigious character of trip	0.70	0.93	0.22
Regeneration from daily home routine and job	1.26	1.10	-0.16
Challenge and stimulate oneself	0.79	0.90	0.11
Sun and beach	0.94	0.97	0.04
Sports (active)	1.01	0.89	-0.12
Search for esteem	0.71	0.84	0.13
Experience of nativeness	0.79	0.87	0.08
Experience of adventure and perhaps even risk	0.73	0.92	0.19
Time for partner	1.27	1.11	-0.15
Time for the family	1.35	1.10	-0.24
Time for oneself	1.13	1.07	-0.06
	0.86	0.84	-0.02

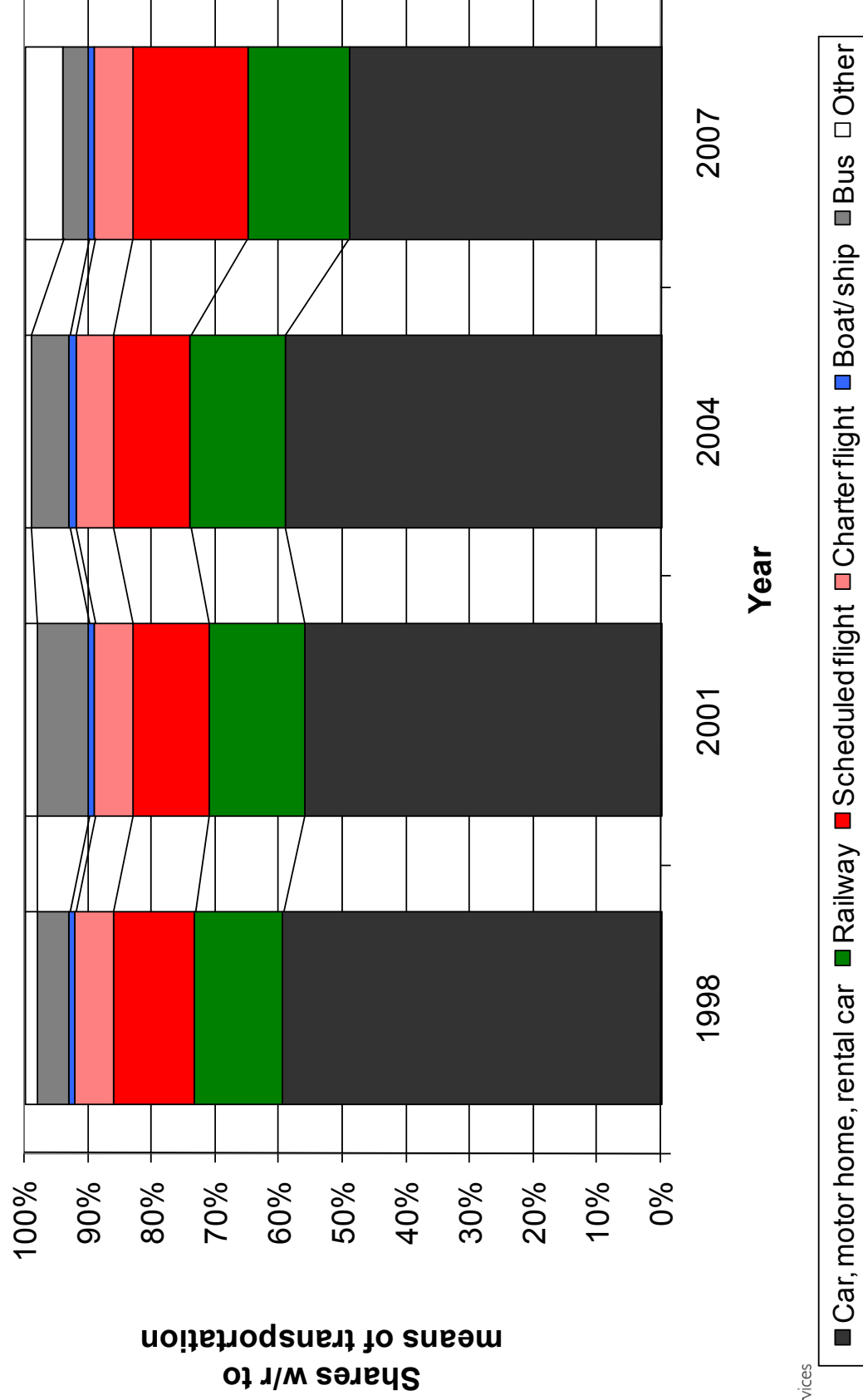
Sources of information (1+ overnights)



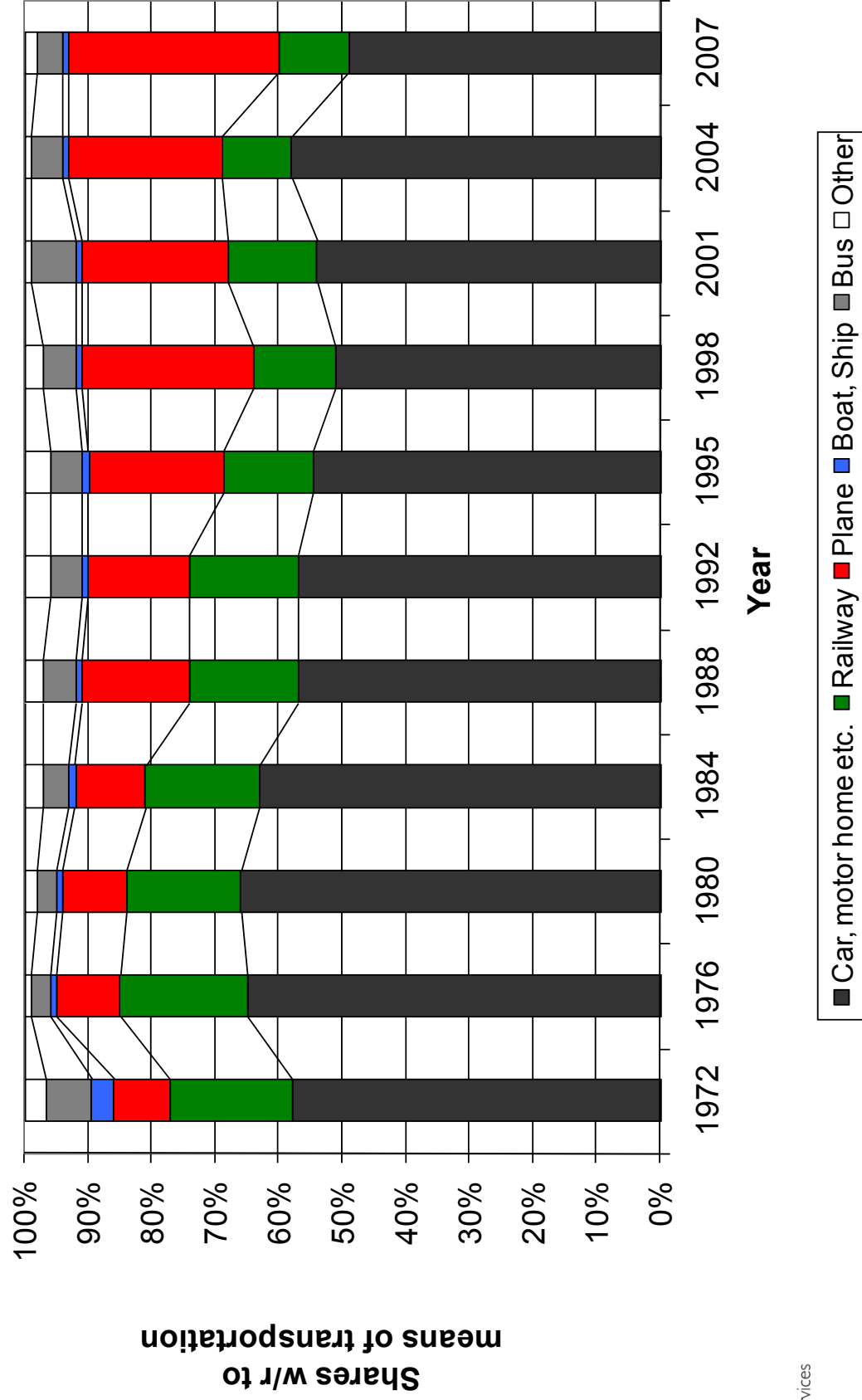
Organisation of trip (1+ overnights)



Transport to destination (1+ overnights)



Transport to destination (4+ overnights)



Choice of accommodation (1+ overnights)

