• Key features of TMS
• Some results (selection)
Key features of TMS
Scope

• **Private trips**: Travel away from home with
  – at least 1 overnight stay
  – all leisure reasons
• **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
Key travel variables recorded

- 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
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*;
• **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.
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

- Net travel propensity (4+ nights)
- Net travel propensity (1+ nights)
- Multiple travel frequency (1+ nights)

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

Net travel propensity (4+ nights)

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Net travel propensities and travel frequencies by age

- Net travel propensity (1+ nights)
- Multiple travel frequency (1+ nights)

Age categories:
- <5 years
- 5-14 years
- 15-24 years
- 25-34 years
- 35-44 years
- 45-54 years
- 55-64 years
- 65-74 years
- >74 years
Net travel propensities and travel frequencies by terminal education

- Cumpulsory schooling/ very basic training
- Apprenticeship/ vocational school
- Vocational graduation
- Secondary/ middle school
- Vocational master diploma
- Technical school
- Higher technical school
- University of applied sciences
- University
- other
- none

50% 60% 70% 80% 90% 100%

Net travel propensity (1+ nights)  Multiple travel frequency (1+ nights)

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Gross travel propensity by WEMF region (1+ overnights)

- French-speaking Switzerland (Suisse romande)
- Alps, pre-Alpine areas
- Western Midlands
- Eastern Midlands

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

- Agglo. with population => 200,000
- Agglo. with population 50,000 - 199,999
- Agglo. with population 20,000 - 49,999
- Agglo. with population 10,000 - 19,999
- Mun. with population 5,000 - 9,999
- Mun. with population 2,000 - 4,999
- Mun. with population 1,000 - 1,999
- Mun. with population < 1,000

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

- 1 person
- 2 persons
- 3 persons
- 4 persons
- 5 persons

Size of household

0% 50% 100% 150% 200% 250% 300%

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Duration of trip (1+ overnights)

 Shares w/r to duration of trips

- 1 overnight stay
- 2-3 overnight stays
- 4-7 overnight stays
- 8-14 overnight stays
- 15-21 overnight stays
- more than 21 overnight stays

Year


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Duration of trip (4+ overnights)

Shares w/r to duration of trips

Year

4-7 overnight stays
8-10 overnight stays
11-14 overnight stays
15-21 overnight stays
more than 21 overnight stays
Choice of destination (4+ overnights)

- In 1972, 90% of choices were for destination (overnights).
- In 2007, the share is significantly lower, around 20% for destination.

The chart shows a decrease in the share of destination from 1972 to 2007, with a notable increase in overseas destinations.

- Switzerland: Red
- Neighbouring countries: Green
- Other European countries: Blue
- Overseas: Grey
Month of departure (1+ overnights)
Type of trip (1+ overnights)

- Beach holiday by an ocean or lake
- City trip
- Excursion/sightseeing/study trip
- Cruise
- Health-oriented trip/wellness trip
- Winter holiday in the snow
- Event trip
- Visiting friends and relatives
- Other type of trip

Share of cases "great" and "core" relevance w/r to type of trip

Year:
- 1998
- 2001
- 2004
- 2007

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Travel motivation (1+ overnights)

- Nightlife
- Comfort, Pampering
- Time for partner
- Time for family
- Time for myself
- Landscape and nature
- Visiting sights, broaden knowledge
- Spontaneous, flexible decisions
- Beauty
- Sports
- Sun and Beach
- Other

Values relative to mean

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Travel motivation (1+ overnights) (1)

- Diversion; see and experience something new
- Enjoyment of comfort and pampering
- Get away from it all (daily routine)
- Liberation from obligations (and relations)
- Time for partner
- Time for the family
- Regeneration from daily home routine and job
- Experience landscapes and nature
- Time for oneself
- Rest and relaxation
- Ability to make flexible, spontaneous decisions

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Travel motivation (1+ overnights) (2)

- Sun and beach
- Visit and experience sights and culture; expand
- Termination/conclusion of a phase in one's life by...
- Prestigious character of trip
- Experience of adventure and perhaps even risk
- Challenge and stimulate oneself
- Enjoy nightlife
- Sports (active)
- Experience of exotic
- Experience of nativeness
- Make contact with new people
- Search for esteem
- Do something for my beauty

Relative magnitude 2007

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<table>
<thead>
<tr>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>Diversion; see and experience something new</td>
<td>1.18</td>
<td>1.27</td>
<td>0.08</td>
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<tr>
<td>Get away from it all (daily routine)</td>
<td>1.44</td>
<td>1.22</td>
<td>-0.23</td>
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<td>Liberation from obligations (and relations)</td>
<td>1.00</td>
<td>1.15</td>
<td>0.15</td>
</tr>
<tr>
<td>Visit and experience sights and culture; expand own horizon</td>
<td>1.11</td>
<td>0.97</td>
<td>-0.14</td>
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<tr>
<td>Termination/ conclusion of a phase in one's life</td>
<td>0.73</td>
<td>0.96</td>
<td>0.23</td>
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<td>Rest and relaxation</td>
<td>1.44</td>
<td>1.06</td>
<td>-0.39</td>
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<tr>
<td>Do something for my beauty</td>
<td>0.75</td>
<td>0.81</td>
<td>0.06</td>
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<td>Experience of exotic</td>
<td>0.77</td>
<td>0.87</td>
<td>0.10</td>
</tr>
<tr>
<td>Ability to make flexible, spontaneous decisions</td>
<td>0.90</td>
<td>1.01</td>
<td>0.11</td>
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<tr>
<td>Enjoyment of comfort and pampering</td>
<td>0.95</td>
<td>1.25</td>
<td>0.30</td>
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<tr>
<td>Experience landscapes and nature</td>
<td>1.48</td>
<td>1.10</td>
<td>-0.37</td>
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<tr>
<td>Enjoy nightlife</td>
<td>0.77</td>
<td>0.90</td>
<td>0.12</td>
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<tr>
<td>Make contact with new people</td>
<td>0.91</td>
<td>0.87</td>
<td>-0.04</td>
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<td>Prestigious character of trip</td>
<td>0.70</td>
<td>0.93</td>
<td>0.22</td>
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<td>Regeneration from daily home routine and job</td>
<td>1.26</td>
<td>1.10</td>
<td>-0.16</td>
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<td>Challenge and stimulate oneself</td>
<td>0.79</td>
<td>0.90</td>
<td>0.11</td>
</tr>
<tr>
<td>Sun and beach</td>
<td>0.94</td>
<td>0.97</td>
<td>0.04</td>
</tr>
<tr>
<td>Sports (active)</td>
<td>1.01</td>
<td>0.89</td>
<td>-0.12</td>
</tr>
<tr>
<td>Search for esteem</td>
<td>0.71</td>
<td>0.84</td>
<td>0.13</td>
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<tr>
<td>Experience of nativeness</td>
<td>0.79</td>
<td>0.87</td>
<td>0.08</td>
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<tr>
<td>Experience of adventure and perhaps even risk</td>
<td>0.73</td>
<td>0.92</td>
<td>0.19</td>
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<td>Time for partner</td>
<td>1.27</td>
<td>1.11</td>
<td>-0.15</td>
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<tr>
<td>Time for the family</td>
<td>1.35</td>
<td>1.10</td>
<td>-0.24</td>
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<tr>
<td>Time for oneself</td>
<td>1.13</td>
<td>1.07</td>
<td>-0.06</td>
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<tr>
<td>Other</td>
<td>0.86</td>
<td>0.84</td>
<td>-0.02</td>
</tr>
</tbody>
</table>
Sources of information (1+ overnights)

- Brochures of destination (communal level)
- Brochures of destination (region to country)
- Accommodation guide of destination
- Accommodation guide of national or...
- Brochures of tour operators
- Travel agencies
- Rail service/ train stations
- Tourist information at destination
- NTO in Switzerland
- Ads in newspapers and magazines
- Travel guides, books, journals
- Video, DVD, CD-ROM
- Travel fairs and exhibitions
- Broadcasts in TV and radio
- Internet/ WWW
- Friends and relatives
- Other sources of information

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Organisation of trip (1+ overnights)

Year | No Package Tour/Holiday | Single Package Tour/Holiday | Group Package Tour/Holiday | Other Type of Package Tour
-----|------------------------|-----------------------------|---------------------------|------------------------
1998 | 60%                    | 10%                         | 20%                       | 10%                    
2001 | 60%                    | 10%                         | 20%                       | 10%                    
2004 | 60%                    | 10%                         | 20%                       | 10%                    
2007 | 60%                    | 10%                         | 20%                       | 10%                    

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Transport to destination (1+ overnights)

Shares w/r to means of transportation

<table>
<thead>
<tr>
<th>Year</th>
<th>Car, motor home, rental car</th>
<th>Railway</th>
<th>Scheduled flight</th>
<th>Charter flight</th>
<th>Boat/ship</th>
<th>Bus</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>1998</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>2001</td>
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<td>2004</td>
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<tr>
<td>2007</td>
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</tr>
</tbody>
</table>
Transport to destination (4+ overnights)

<table>
<thead>
<tr>
<th>Year</th>
<th>Car, motor home etc.</th>
<th>Railway</th>
<th>Plane</th>
<th>Boat, Ship</th>
<th>Bus</th>
<th>Other</th>
</tr>
</thead>
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<td>1972</td>
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<td>1976</td>
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<td>1980</td>
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<td>1988</td>
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<td>2007</td>
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</tr>
</tbody>
</table>
Choice of accommodation (1+ overnights)

- Hotel/club/motel ****-*****
- Hotel/club/motel * (Friends and relatives)
- Private room
- Holiday home at privileged rate
- Holiday home at regular rate
- Camping, incl. tent, trailer, mobile home
- Other category