Institute for Public Services and Tourism

University of St.Gallen

Travel Market Switzerland - Overlook

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- 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
- **Private excursions**: Travel away from home with
  - no overnight stays
  - distance of at least 30km or
  - destination frequency less than 6 times a year

Method, Sampling, Sample

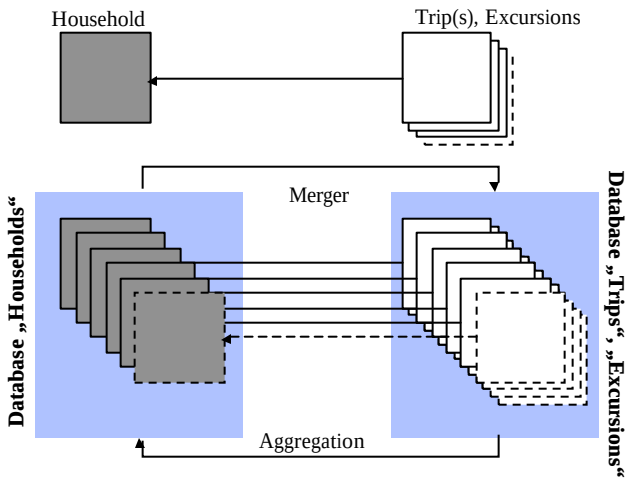
- **Method:** Self-administrated and structured written interviews of household, including the examination of
  - the households themselves
  - all trips made by their members
- **Sampling:** Representative sample of households, located in the German- and French-speaking part of Switzerland (consumer jury by IHA.GfK)
- **Sample:**
  - 1‘263 households
  - 8‘663 persontrips
  - 6‘288 cellexcursions

Restriction / 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% of all trips taken have not been recorded**

Database rational of TMS



Databases available by means of SPSS

- Household_4waves.sav (1,233 cases by 126 variables)
- Household_persons_4waves.sav (3,149 cases by 79 variables)
- Trips_cells_4waves.sav (4,300 cases by 349 variables)
- Trips_persons_4waves.sav (8,744 cases by 349 variables)
- Excursions_cells_4waves.sav (6,288 cases by 81 variables)
- Additional files with more cases on a non 4-wave basis

Key travel variables recorded 1

- 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 before travel decision

Key travel variables recorded 2

- Travel decision structure (pro Destination vs. pro activity)
- Sources of information for travel preparation
- 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

Key travel variables recorded 3

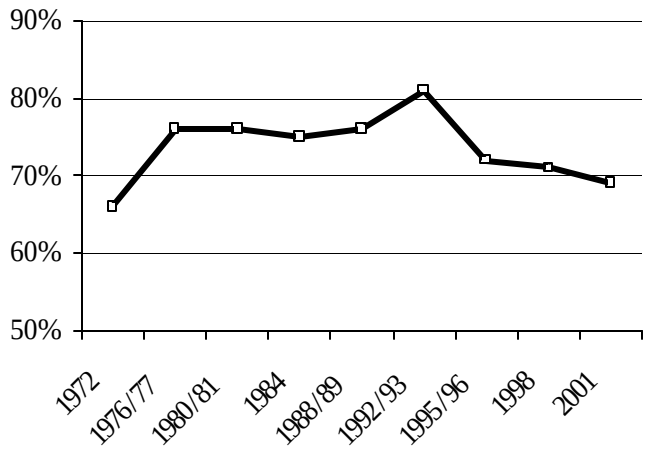
- Satisfaction: with trip as a whole, with the products offered in the destination, with the accommodation chosen
- Travel costs
- Probability of returning to the same destination or the same accommodation

Some results

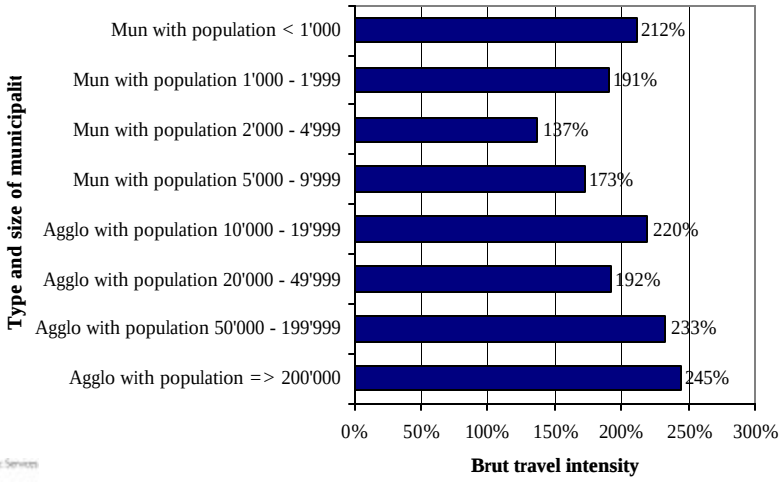
Results overview

- With regard to travel propensities, a high level stabilization can be observed
- There is an indication of a trend termination with regard to the shorteing of trips
- Switzerland remains the favourite destination, even with market shares continously declining
- Summer season is loosening to spring and fall
- Visiting friens and relatives is among the stongest drivers of travel
- Cars and planes still dominate more than ever
- The hotel industry is reclaiming market shares at cost of the parahotel sector

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



Brut travel propensity by size of origin



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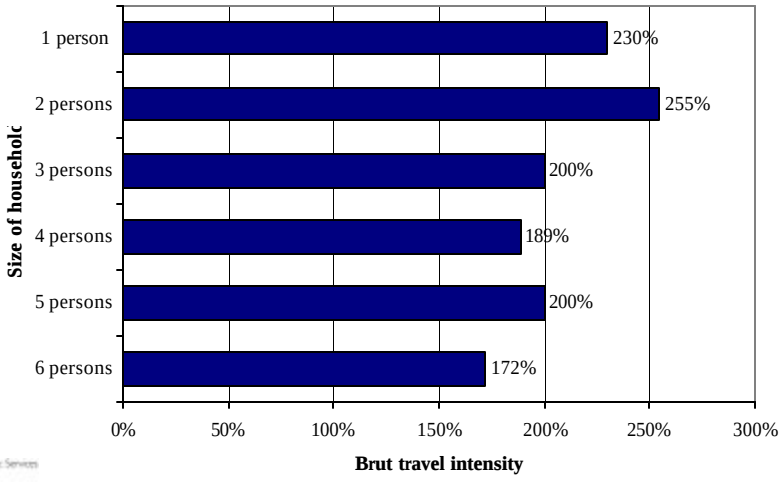
Brut travel propensity by size of household



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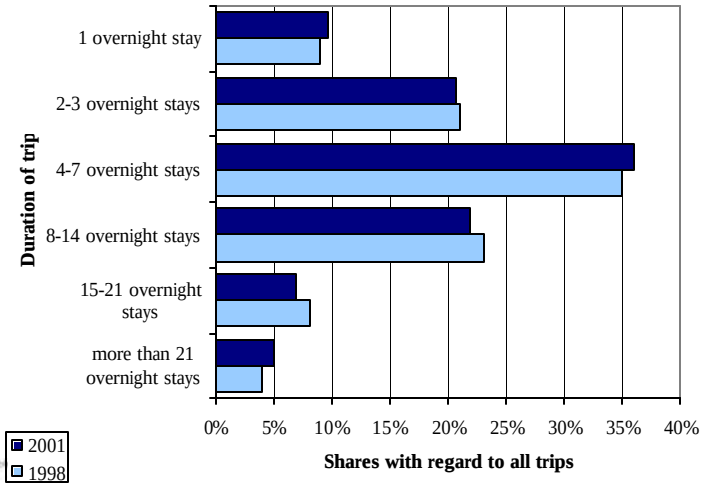
Duration of trip



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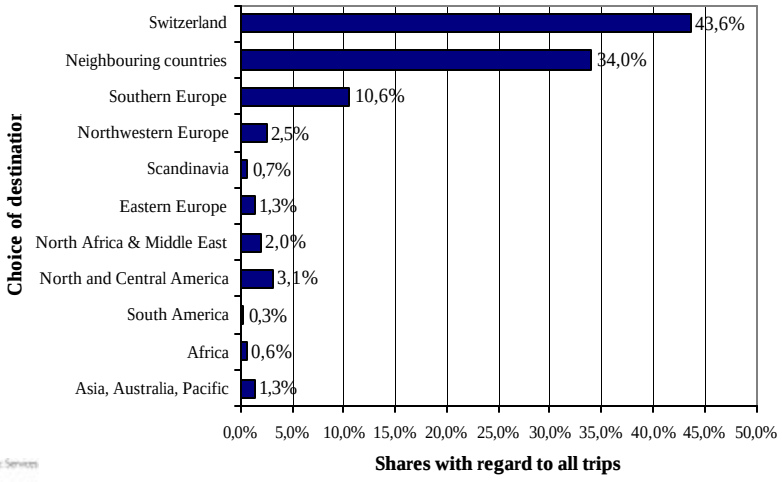
Destination choice



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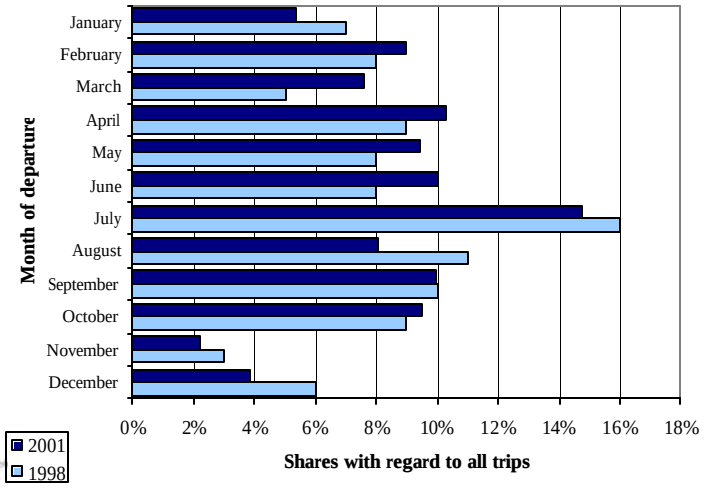
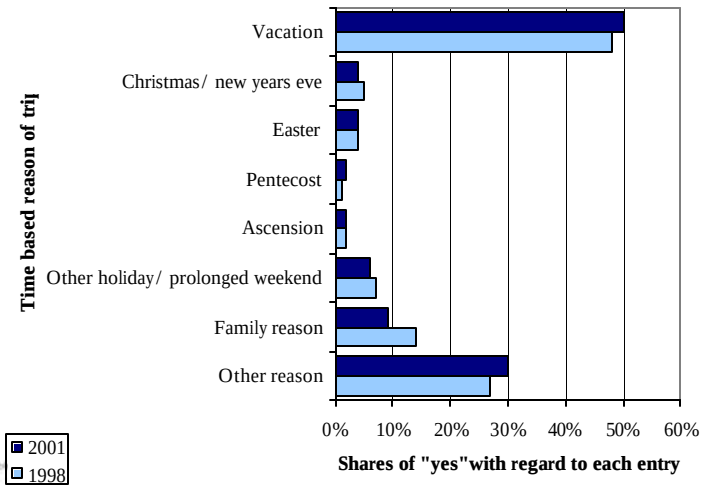
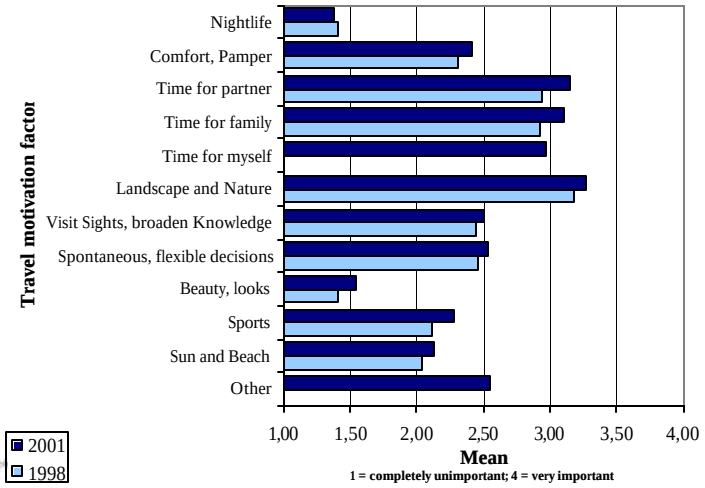
Month of departure



Time based reason of trip



Motivation



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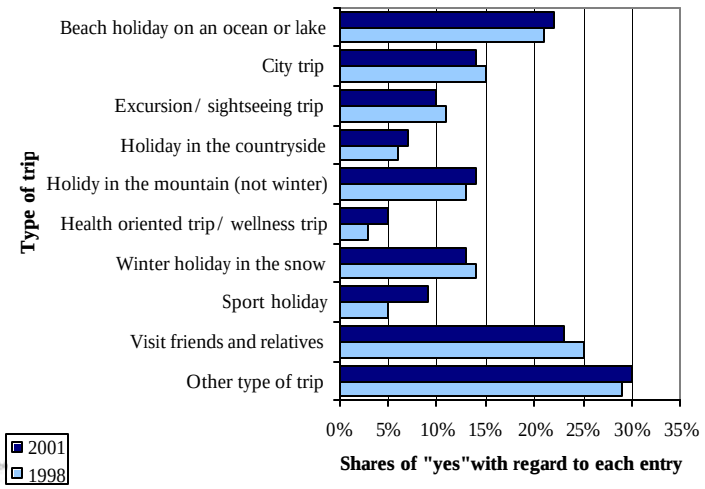
Type of trip



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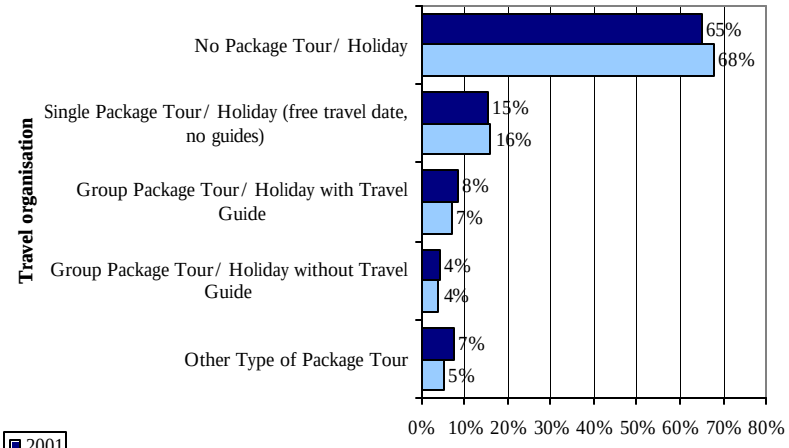
Organisation of trip



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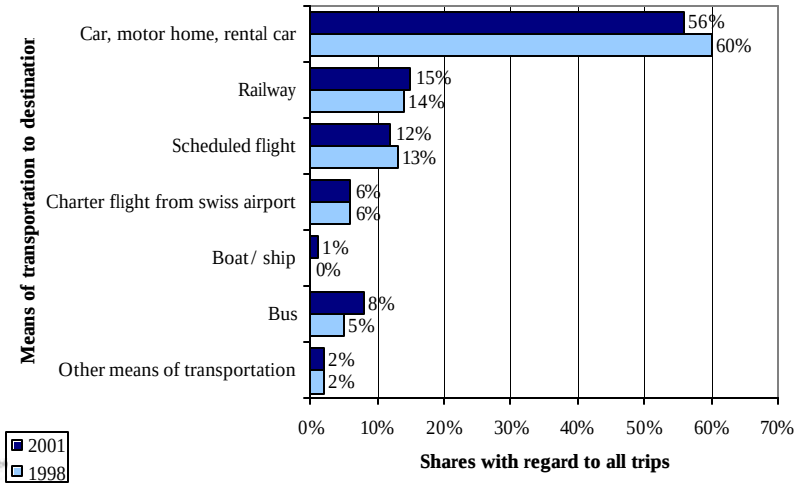
Transport to destination



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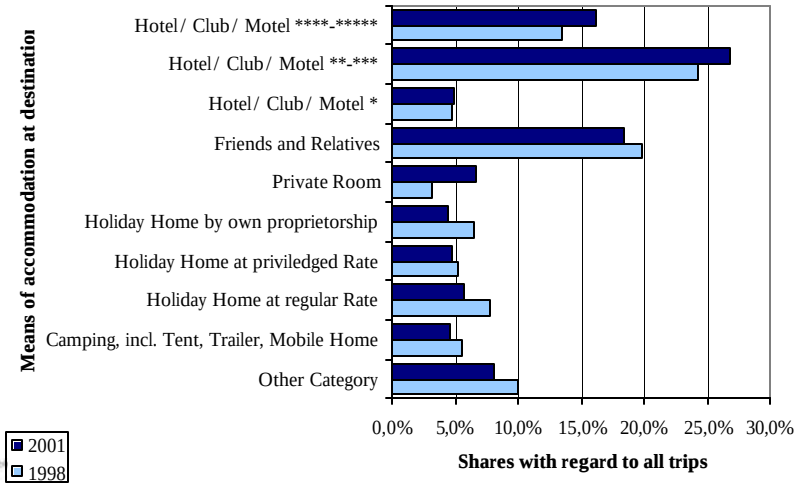
Choice of accommodation



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