

# The Future of Mobility and its Impact on Tourism

## Part 1: Impacts of travel motives and interests

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FH Zentralschweiz

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## Content

- Study concept, scope of interpretation and thematic framework
- Results: Impacts of travel motives and interests on future aspects of mobility and tourism
- Conclusion and ideas for discussion

## Design of the study

### Key questions:

- How do experts rate trends that may effect mobility and tourism by 2030?
- Are there any differences with regard to the expert's background (field of expertise und continent)?

### Sample and response rate:

- 3,949 experts contacted by e-mail and online questionnaire
- 1,137 participated (29%)
- 471 experts participated anonymously through e-mail newsletters
- Total sample: 1,608 experts

Slide 3, 27 April 2009

## Scope of interpretation

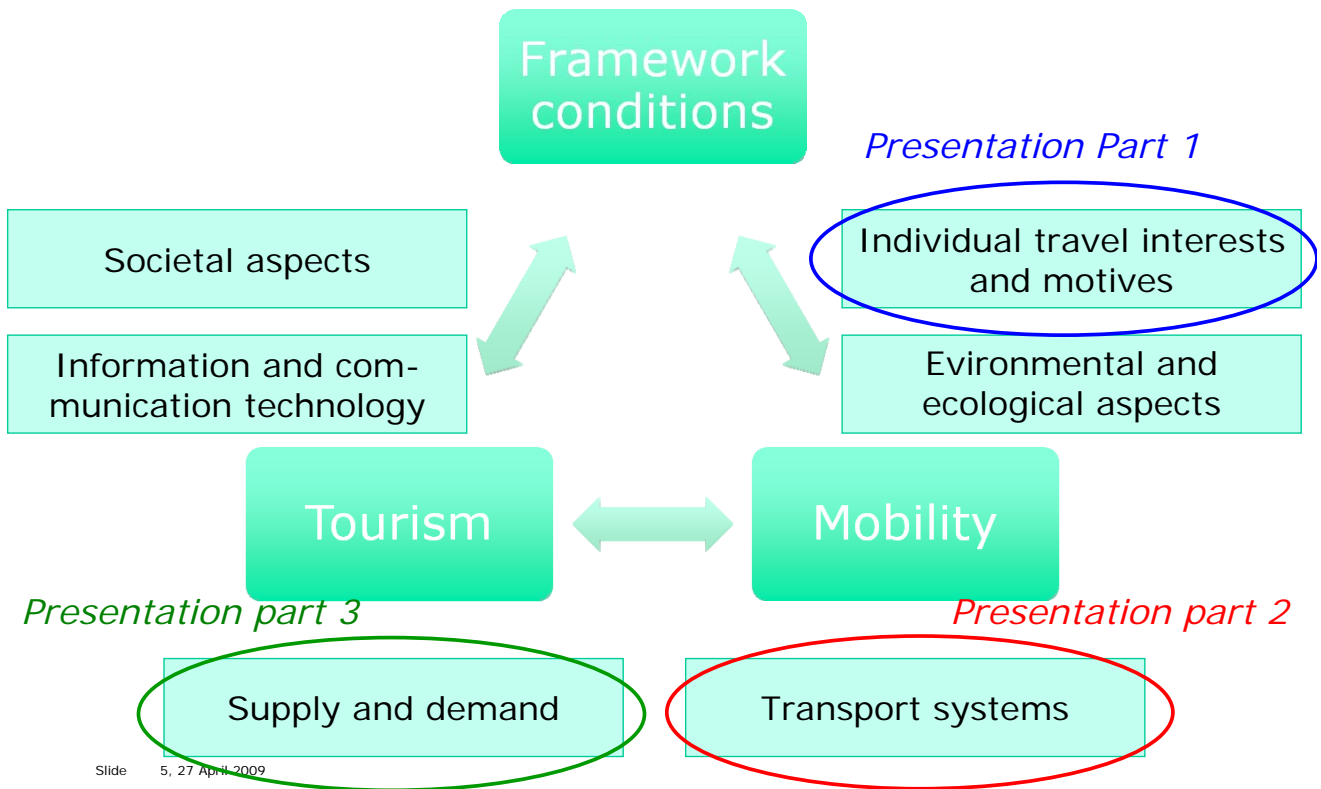
Field of expertise	Frequency	Percent
Tourism	228	14%
Mobility/ Transport	792	49%
Technology	219	14%
Society	158	10%
Science	115	7%
Other fields	95	6%
<b>TOTAL</b>	<b>1,608</b>	<b>100%</b>

Conti-nents	Fre-quency	Per-cent
North America	216	13%
South America	37	2%
Europe	1,129	70%
Asia	115	7%
Africa	37	2%
Australia	39	2%
No response	35	2%
<b>TOTAL</b>	<b>1,608</b>	<b>100%</b>

*Are there differences as regards field of expertise and the continent?*

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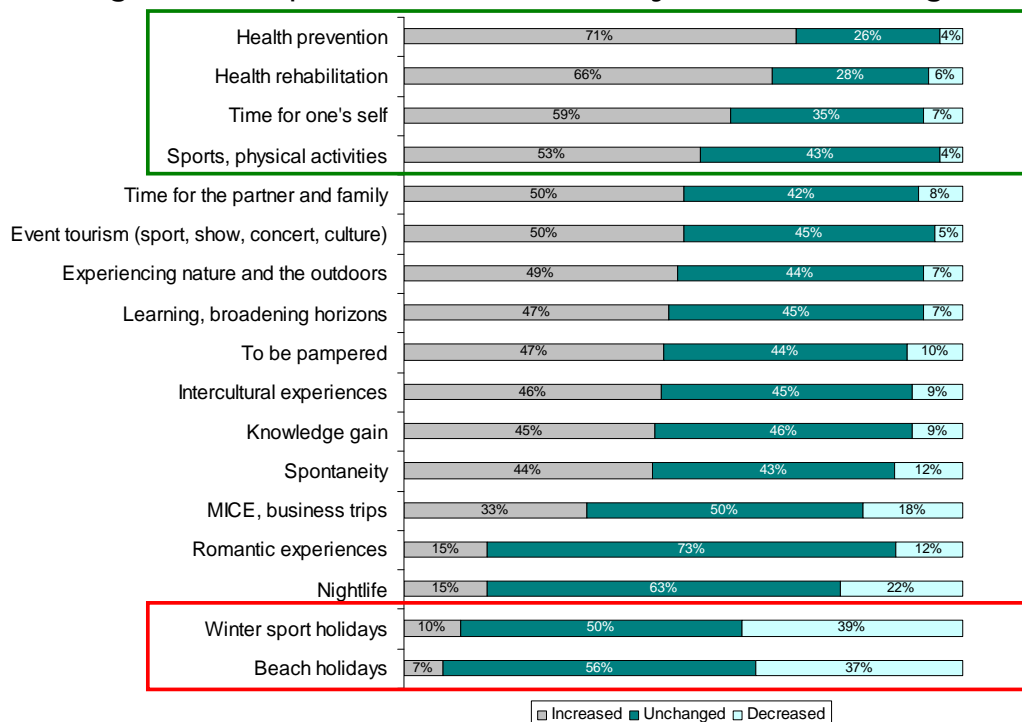
# Analytical framework of the study



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## Travel motives

Health, time for one's self and sport/physical activities are increasing; winter sport and beach holidays are decreasing



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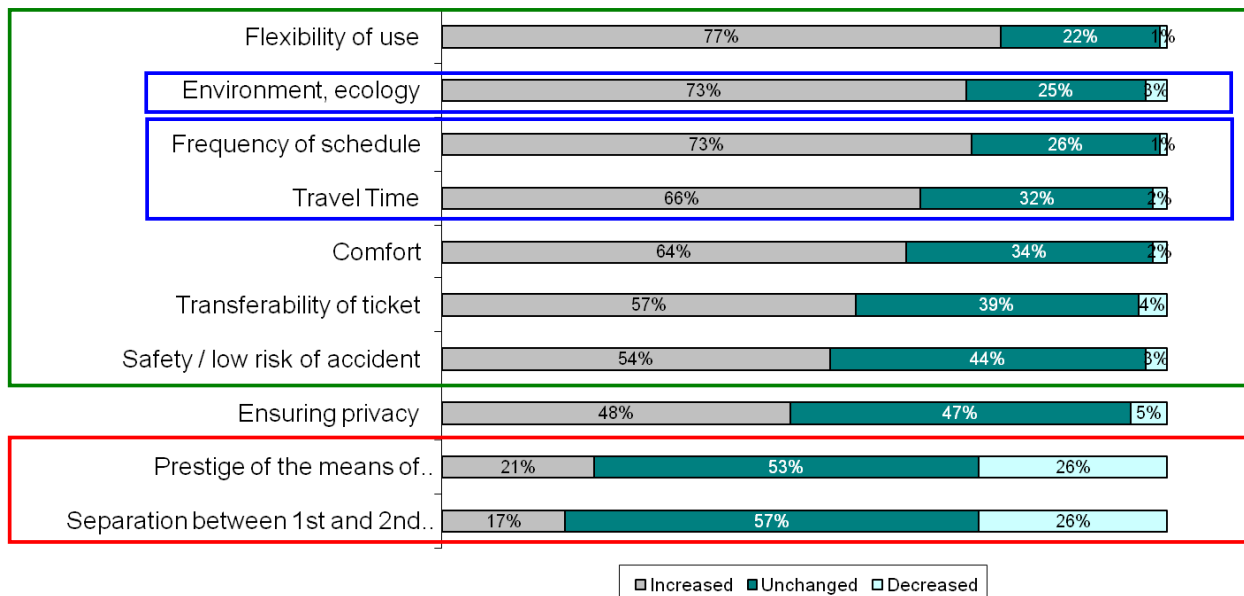
## Travel motives: Conclusions

- The importance of health is evident in the high ratings of experts, who see health prevention and rehabilitation as an increasing travel motivator.
- Specialised forms of tourism will rise in importance by 2030; they will gain market share from classical forms of tourism.
- Despite the increasing importance of specialised forms of travel, winter tourism and beach holiday will still have the largest market share as seen from their current level.
- Decision makers in the tourism market must develop new offers in order to meet new types of demand.

Slide 7, 27 April 2009

## Choice of means of transport

Customer expectations increase in most cases, only prestige aspects remain stable or decrease slightly

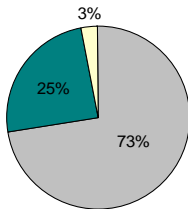


Slide 8, 27 April 2009

## Choice and modal split of means of transport

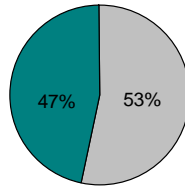
Increasing importance of environmental friendliness of transport means

Legend: Increased (light grey), Unchanged (dark teal), Decreased (yellow)

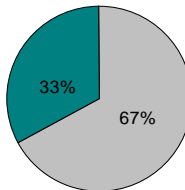


Fair travel is more important for private trips than for business trips

Legend: Important (light grey), Not Important (dark teal)



Business trips

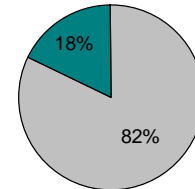


Private trips

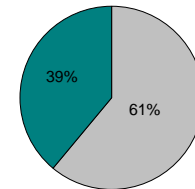


Increased share of public transport systems in the modal split

Legend: Agree (light grey), Disagree (dark teal)



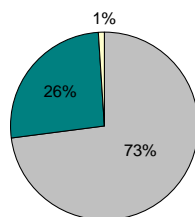
Large scale replacement of air travel by high speed trains



## Travel expectations and tourism supply

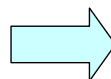
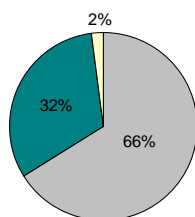
Increasing importance of frequency of schedule

Legend: Increased (light grey), Unchanged (dark teal), Decreased (yellow)



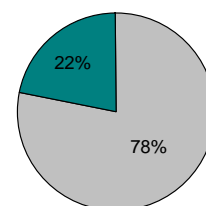
Increasing importance of travel time

Legend: Increased (light grey), Unchanged (dark teal), Decreased (yellow)



The hospitality industry underestimates the importance of connections to public transport when guests choose a hotel

Legend: Agree (light grey), Disagree (dark teal)



## Travel expectations and tourism supply: Conclusions

- Since environmental concerns are of rising importance for customers when travelling, the significance of public transport is likely to increase as well.
- Consequently good access by public transport to tourism destinations will be an essential factor by 2030.
- This is not only the case for hotels, but for the whole destination and all its suppliers.

Slide 11, 27 April 2009

## Conclusion and ideas for discussion

- Framework conditions, mobility, and tourism are closely interwoven
- Our data offers a glimpse of possible scenarios
- The anticipation of "future scenarios" leads to decisions today that are likely to shape mobility and tourism in future.

As a result ...

### ***Self-fulfilling prophecy:***

*The belief of people, stakeholders, experts and decision makers of how the future will turn out by 2030 will impact the outcome.*

Slide 12, 27 April 2009

**Thank you for your attention!**