

Brunico (I), December 2013 | Lohmann, Kuhnimhof, Grimm & Frick

Long Distance Travel in Central Europe

Comprehensive Segmentation, Current Trends, and Implications

iNFRAS



Consumer Behavior in Tourism
Symposium 2013 (CBTS 2013)
December 4-7, 2013
Bruneck/Brunico, South Tyrol, Italy

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2. The study and its objectives
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tourism research and mobility research
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7. Drivers for future development



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INTRODUCTION



Buon giorno!

- Martin Lohmann
- Psychologist in tourism (market) research
- Germany: Kiel and Lueneburg
- NIT –
Institute for Tourism Research in Northern Europe; Kiel
(Tourism Research)
- Leuphana University, Lueneburg
(Consumer Psychology)



The North of Germany

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The "Reiseanalyse"

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STUDY & OBJECTIVES

The Study

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- Title:
“Future Perspectives for Interurban and Long Distance Travel – Baseline Study “
- Commissioned by:
Institute for Mobility Research (ifmo), Munich, Germany
- Carried out by:
INFRAS, Berne (CH), & NIT, Kiel (D) 2012/2013
- Focus on real behavior; journeys with a distance of 100km +; motorized travel; Europe
- What we can share today:
First results & first insights

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The Background

Interurban and long distance travel (trip distance 100 km or more) represent highly relevant parts of the passenger mobility market.

[Tourist researchers please note: A huge part of the passenger mobility market is composed of journeys below 100 kilometers.]

While we see a stagnation of everyday travel for many industrialized countries, there is strong indication that long distance travel still continues to grow in these countries.

For both categories of travel established instruments for measuring travel demand exist. However, an integrated overview combining different data sources has so far been missing.

Against the background of seemingly changing mobility values (“peak car”, Stampfl, 2012) and the huge efforts necessary to build and to maintain traffic infrastructure a better understanding of long distance travel is needed.

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Information Need

Why do we need to know more about the demand for Long-Distance-Travel?



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Rader Hochbrücke, Sommer 2013, Quelle: DPA

Objectives

- To get to know the situation of long distance travel (comprehensive segmentation)
 - Structure and Segments
 - Volumes
 - Understanding the segments
- To assess current trends in the different segments of travel
- To identify drivers for future development (“trends”)
 - Framework conditions
 - Endogen factors
 - Conceptual model for projecting the future perspectives for long distance travel demand
- In a holistic approach, covering everyday traffic, excursions, and tourism.

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METHODS

Methods

Read (Literature)

- Situation in Europe



Calculate (secondary analysis)

- Eurostat (EU)
- Flash Eurobarometer (EU+)*
- „Reiseanalyse“ (D)
- National mobility surveys (D, CH, UK, F)



Workshop

- May 15, 2013 in Munich, Germany
- 13 Experts from industry, administration, and research

* EU + Croatia, Turkey, Russia, Iceland, Norway, Serbia, and Israel

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DIFFERENT PERSPECTIVES – TOURISM RESEARCH AND MOBILITY RESEARCH



Torgau, Schloss, Photo: Lohmann, Aug. 2013



Torgau, Marktplatz, Photo: Lohmann, Aug. 2013

Was makes a region a potential tourism destination?

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X



X



“Assets”

Amenities

Accessibility

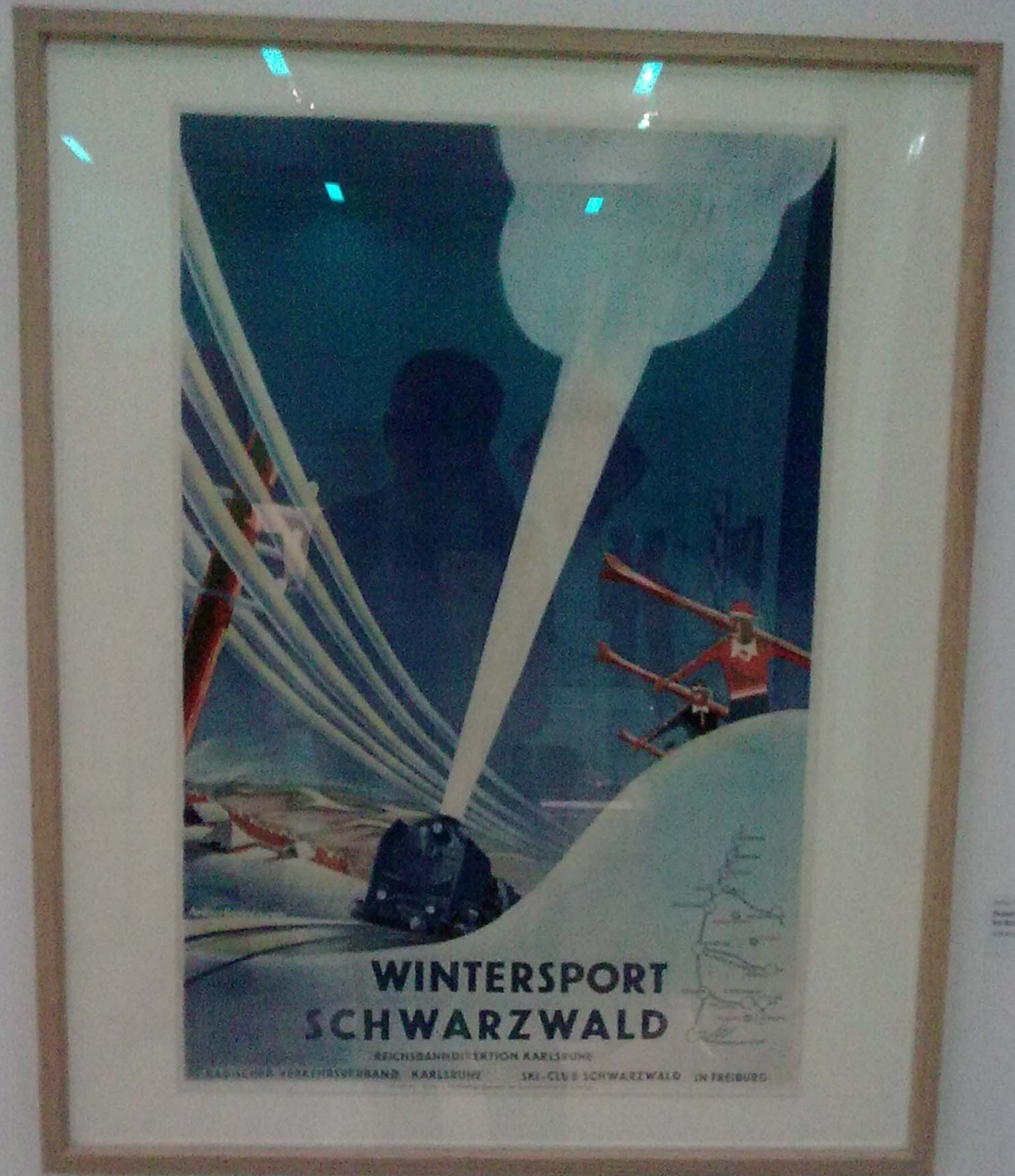
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Reichsbahndirektion
Karlsruhe und Skiclub
Schwarzwald, um 1930

Lohmann, M. et al. | Long Distance





Bahnhof Flughafen Düsseldorf, 6. Sept. 2013, Photo: Lohmann



Zypern; 2012

2012/10/21 12:17 PM

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ΜΗ ΕΙΣΗΓΕΥΕΤΕ
ΑΦΟΡΕΙ ΕΙΣΗΓΕΥΕΤΕ
ΟΡΙΣΜΕΝΩ
ΝΟΤ ΠΑΡΚΙΝΓ
EMBASSY RESERVED
AREA

Different perspectives – tourism research and mobility research

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Tourism research(er) focus on destinations, experiences, expenditures. They think in terms of travelers and trips.

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Mobility / Transport research(er) focus on traffic (movements in space). They think in terms of distances, modes of transport, routes and time.

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Combining these two perspectives may generate new insights and/or a better understanding.

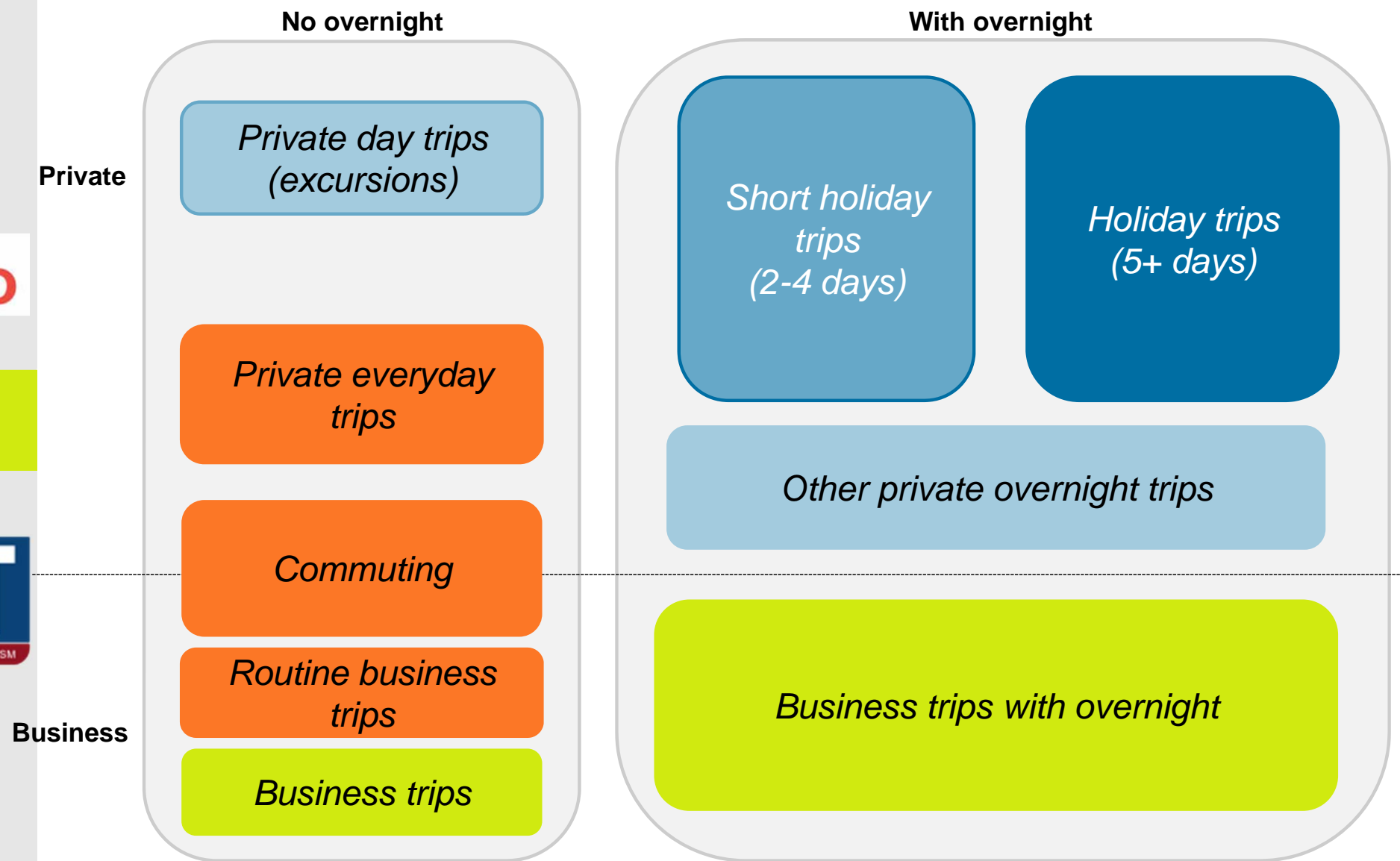
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SEGMENTATION

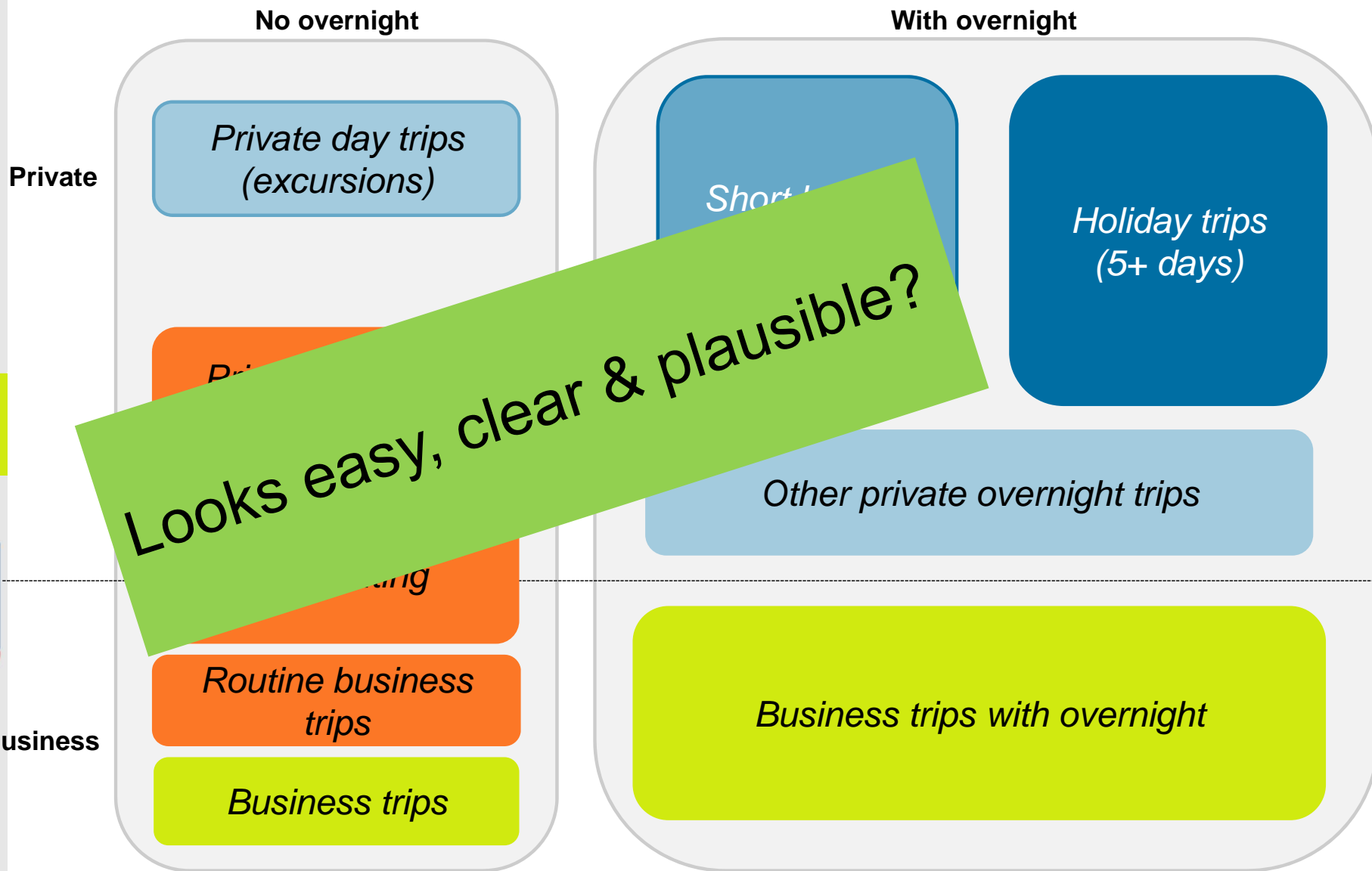
Segments of Long Distance Travel*



- Tourism (private)
 - Tourism (business)
 - Everyday trips (pr. + b.)
- } Outside usual environment
- } Within usual environment

* One way distance 100 km +

Segments of Long Distance Travel*



Looks easy, clear & plausible?

- Tourism (private)
 - Tourism (business)
 - Everyday trips (pr. + b.)
- } Outside usual environment
- } Within usual environment

* One way distance 100 km +

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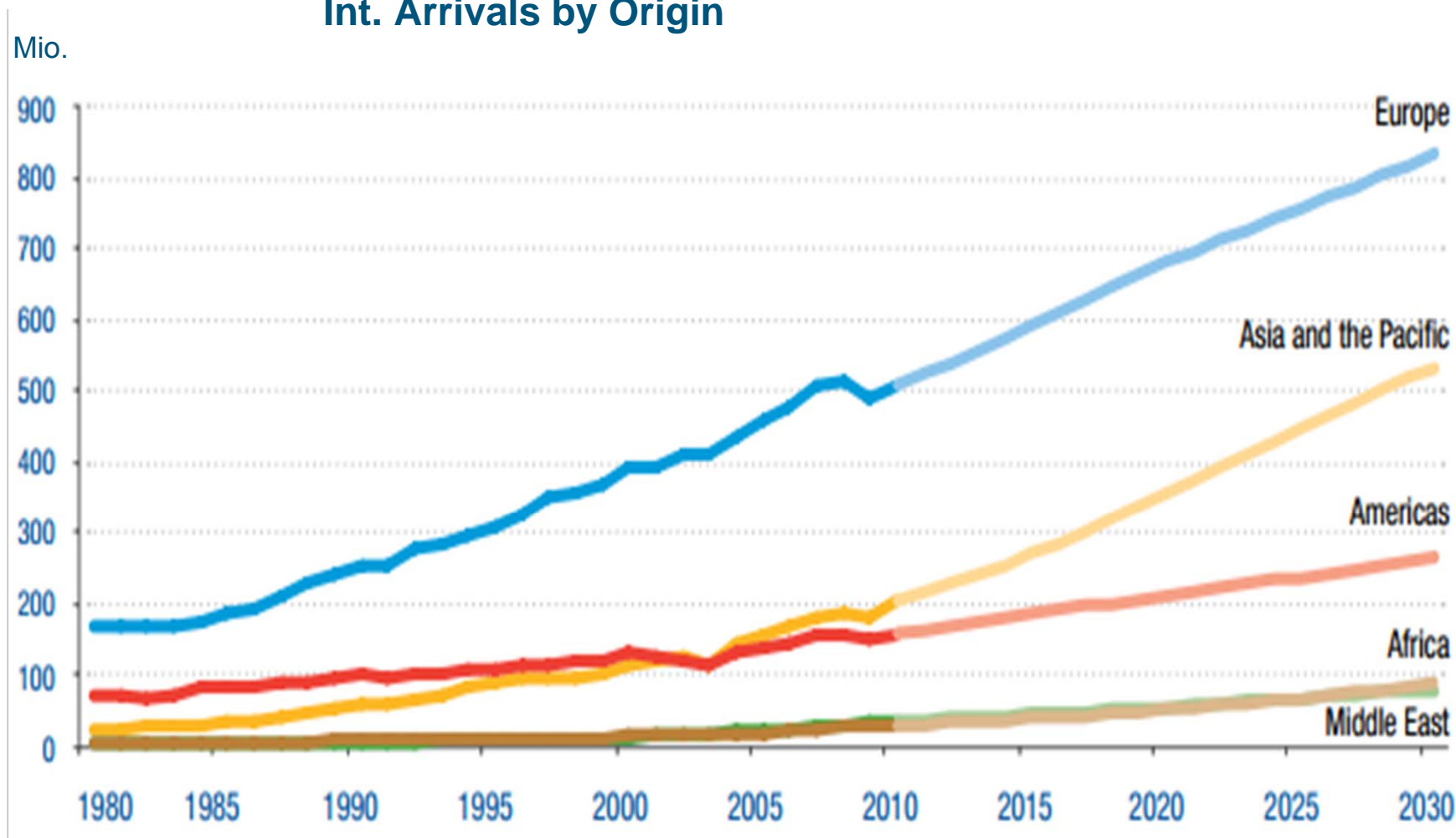
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TREND EXAMPLES

International Tourism till 2030

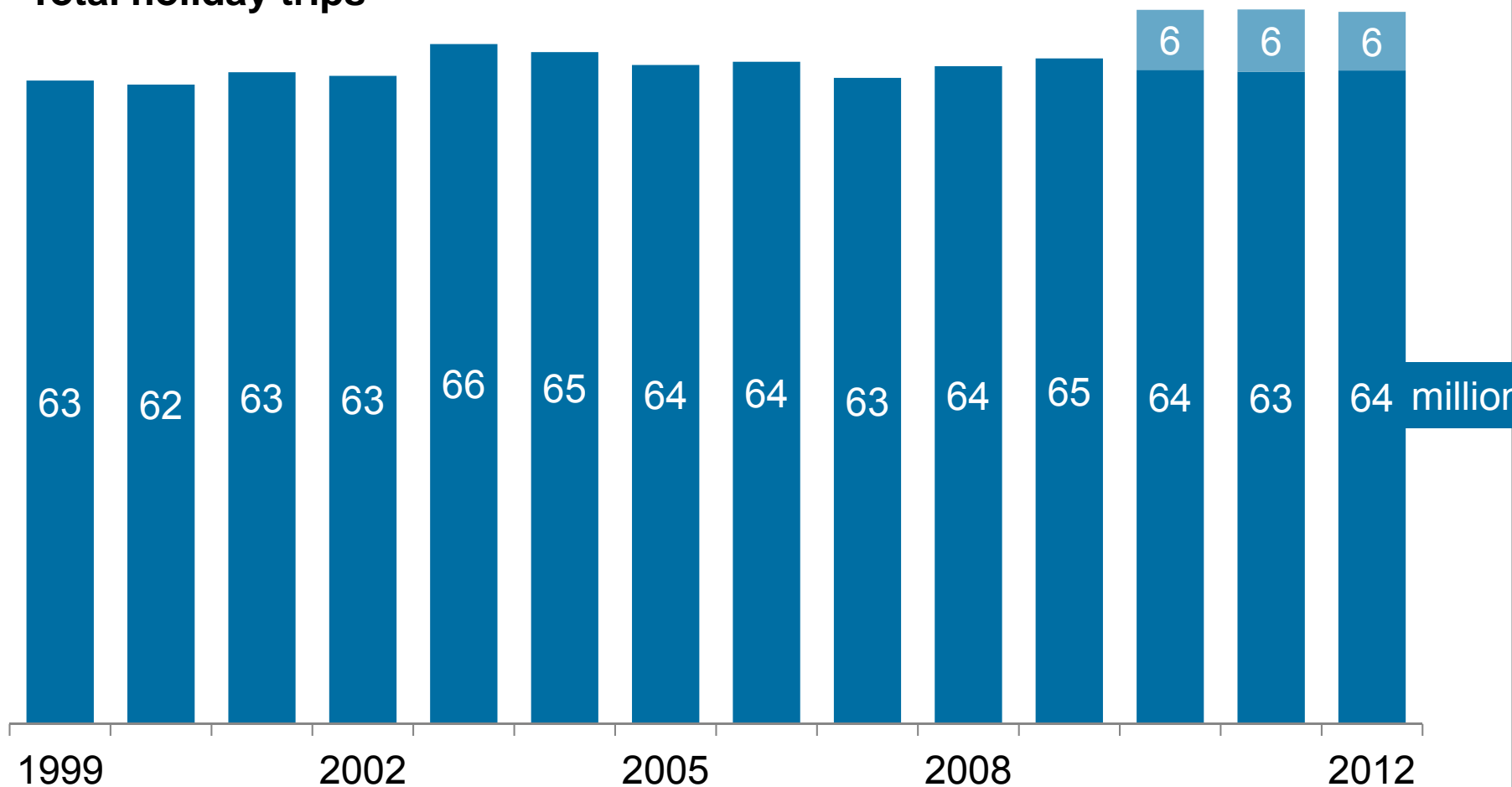
Int. Arrivals by Origin



Basis: International arrivals
Source: UNWTO (2011): Tourism Towards 2030 (advance edition)

Holiday trips by the number - Germany

Total holiday trips



Basis: Holiday trips (5 days +) of the German population, since 2010 with German speaking foreigners living in Germany in private households, aged 14 years +

Source: Reiseanalyse RA 2000-2013

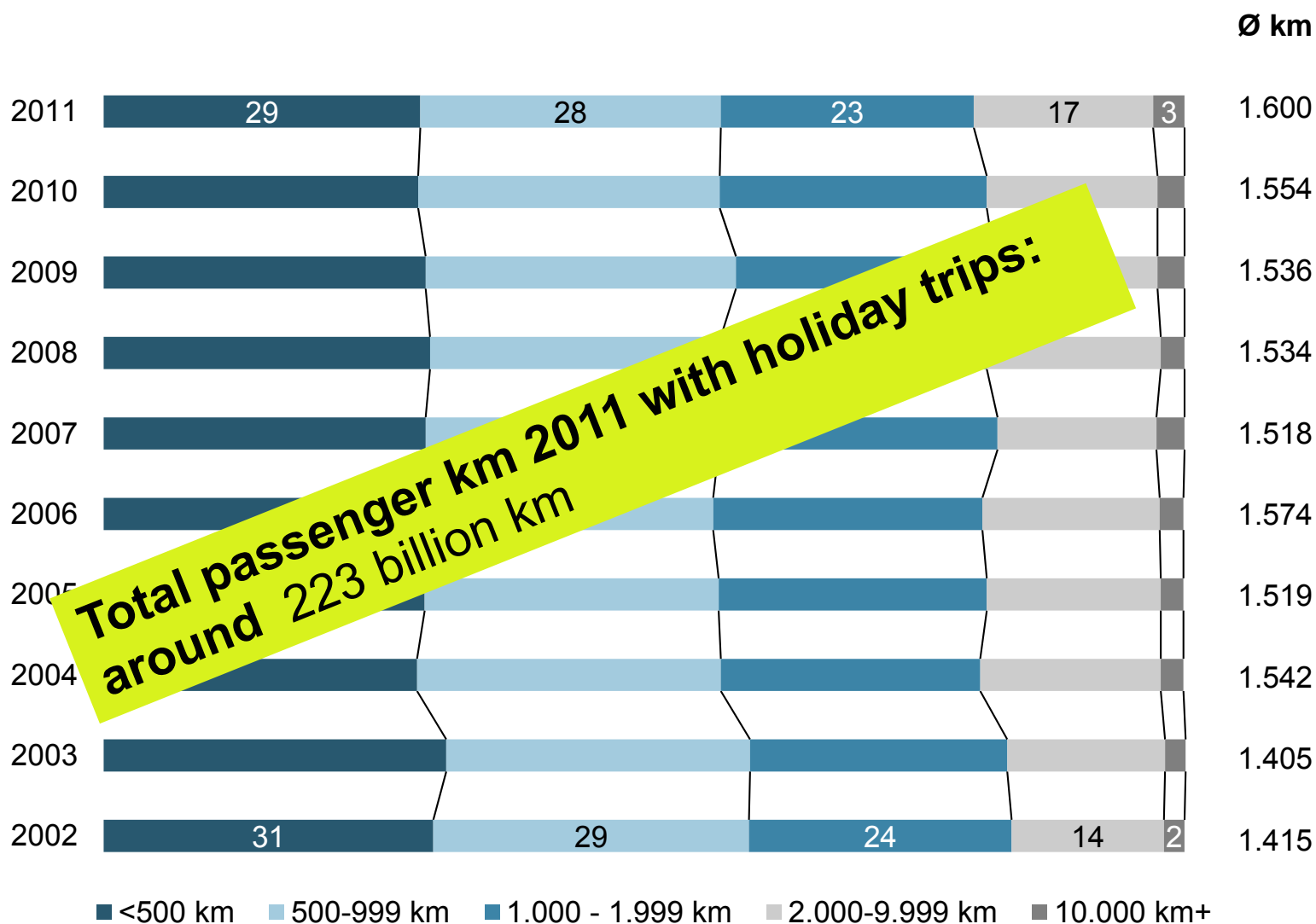
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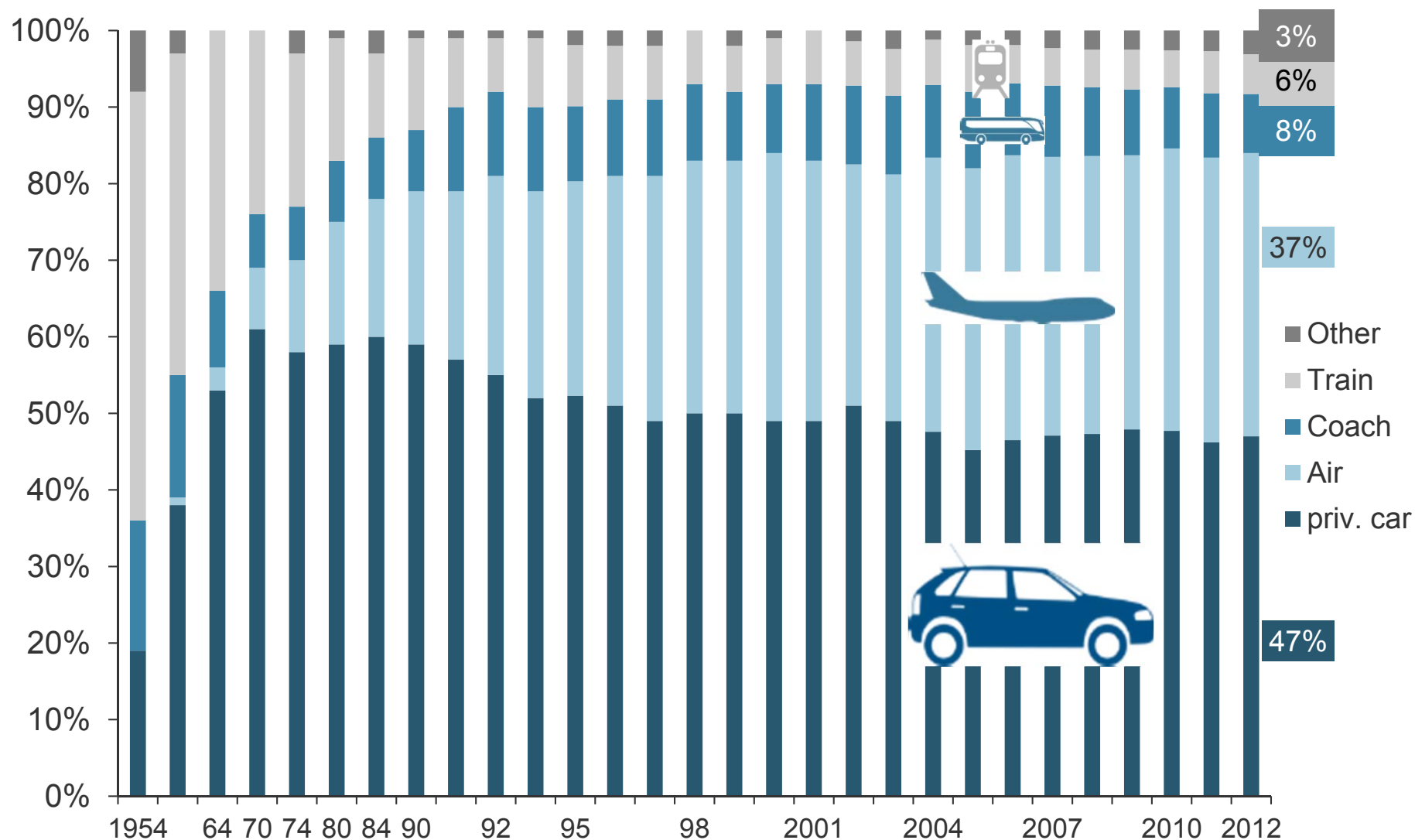
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German Holiday trips: Distances



Basis: Holiday trips (5 days +) of the German population, since 2010 with German speaking foreigners living in Germany in private households, aged 14 years + ; distances = estimation of single distance between home and destination.
Source: Reiseanalyse RA 2000-2013 , own calculations

German Holiday trips: Means of transportation



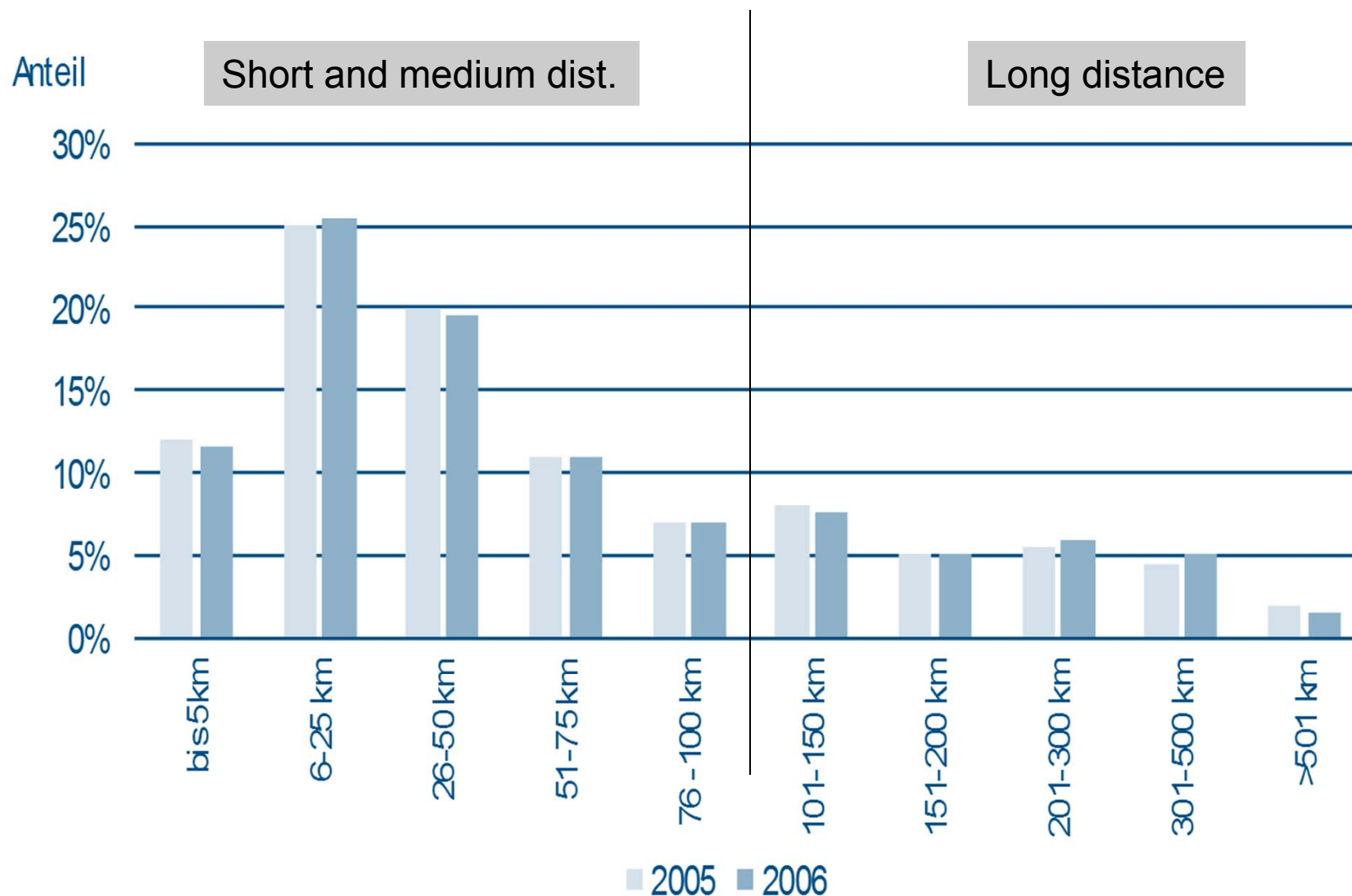
Basis: Holiday trips (5 days +) of the German population, since 2010 with German speaking foreigners living in Germany in private households, aged 14 years +
Source: Reiseanalyse

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Excursions from home: 3,000,000,000/year [Germany]; Ø 84 km



Basis: 2,97 Mrd. Tagesausflüge der Bevölkerung 14 Jahre+ im Jahr 2006 bzw. 2,82 Mrd 2005 (Quelle: Maschke 2006/2007)

Long Distance Travel: Actual Shares

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	Actual Shares (Pkm)
Holiday trips (5+ days)	33%
Short Holiday Trips (2-4 Tage)	10%
Other private overnight trips	2%
Excursions/day trips	25%
Business trips with overnight	13%
Routine business (day) trips	8%
Everyday travel (commuting and other private)	9%

- Total passenger/km per person and year in Germany = around 21,500 km
- (*wow: 1,505,000,000,000 km for the population*)
- 55% short distance travel (- 99 km)
- 45% long distance travel (100 km +)



100% = total of long distance [single distance 100km +] passenger kilometers (Pkm)
For the year 2011 based on the German population, aged 14 years+, living in private households; own calculations

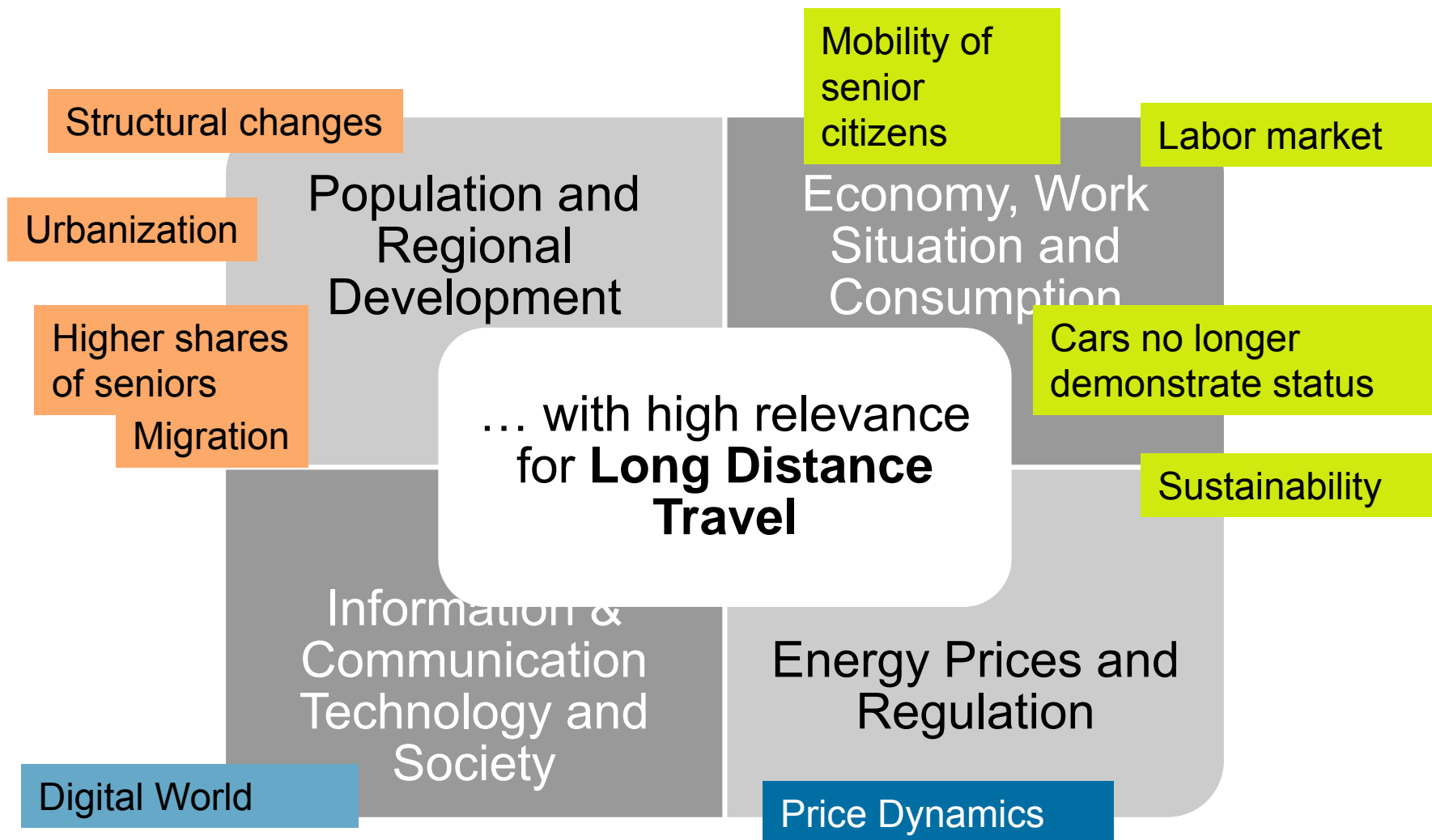
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DRIVERS FOR FUTURE DEVELOPMENT

Important drivers...



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Quelle: Expertenworkshop

Long Distance Travel: Expected Dynamics 2030





	Actual Shares (Pkm)	Expected Development (Pkm)	Future Shares (Pkm)			
			Private Car	Train	Bus/Coach	Plane
Holiday trips (5+ days)	33%	+	→↘	→	→	↗→
Short Holiday Trips (2-4 Tage)	10%	+/o	→	↗	↗	↗→
Other private overnight trips	2%	++	↘	↗	→	↗→
Excursions/day trips	25%	+	→↘	↗	→	→
Business trips with overnight	13%	++	↘	→	→↗	↗→
Routine business (day) trips	8%	++	→↘	↗	→↗	↘
Everyday travel (commuting and other private)	9%	++	↘	↗	→	→

Legend: +++ high increase; ++ medium increase, + low increase, o no increase;
↗ increase, → stable, ↘ decrease

Basis: 100% = total of long distance passenger kilometers (Pkm)
Source: Own calculations, expert workshop



Segnaletica sentieri
1 min

Preliminary Insights

Ticino, CH; Photo: Lohmann, Aug. 2011

Lessons learned on Long Distance Travel (1)

- A clearer picture of who is who and what is what with respect to segments and
- their share of the total traffic volume (=long distance passenger kilometers)
- An overview over the factors impacting the future demand
- An assessment of the dynamics of the future development
- Challenges for future research

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Leipzig; June 2011; Photo: Lohmann

Lessons learned on Long Distance Travel (2)

- The comprehensive perspective leads to different conclusions about how travel demand is developing than the simplified view of tourism as a constantly growing sector.
- Other segments of long distance travel (by Germans) have – in recent years - shown stronger growth than the still dominating holiday travel segment which shows signs of saturation.
- Taken together, this development not only confirms that global tourism demand is increasingly shifting towards **new source markets**; it also shows that **other segments of travel**, e.g. commuter trips, VFR, excursions, and business travel, are becoming more important in mature markets.
- 2 drivers for increased traffic volume
 - (a) Incoming tourists and
 - (b) Non-tourist travel
- This has substantial implications not only for infrastructure planning, or marketing but also for the collection of travel and tourism data.

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DB									
Ab 17:04	IC	2	3	7	2				

Hamburg-Schwerin

Rostock

Venezia S L

Mille Grazie!

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Impressum

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