



TRAVEL AND HOLIDAY STYLES – TARGET GROUPS FOR SUSTAINABLE TOURISM

Results of a socio-empirical survey by the Institute for Social-Ecological Research (ISOE) within the INVENT project

Barbara Birzle-Harder, Konrad Götz

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für Bildung
und Forschung

THE PROJECT APPROACH

1. Assessment of German holiday travel market from the point of view of sustainability and for the selection of 4 destinations



2. Empirical analysis with respect to motives, acceptance and restraints concerning sustainable holiday offers



3. Deduction of target group related sustainable marketing strategies for the selected destinations



4. Development of exemplary tourism offers for a more sustainable mass market in cooperation with the tourism industry



TARGET GROUP MODEL FOR THE TRAVEL MARKET

...which provides insights into

- desires of the target groups and their motivational background as well as their travel behaviour
- attractiveness of innovative tourism offers that represent steps in the direction of sustainability.



RESEARCH METHODS

1. Qualitative Phase

- 4 focus groups
- 60 indepths

2. Quantitative Phase

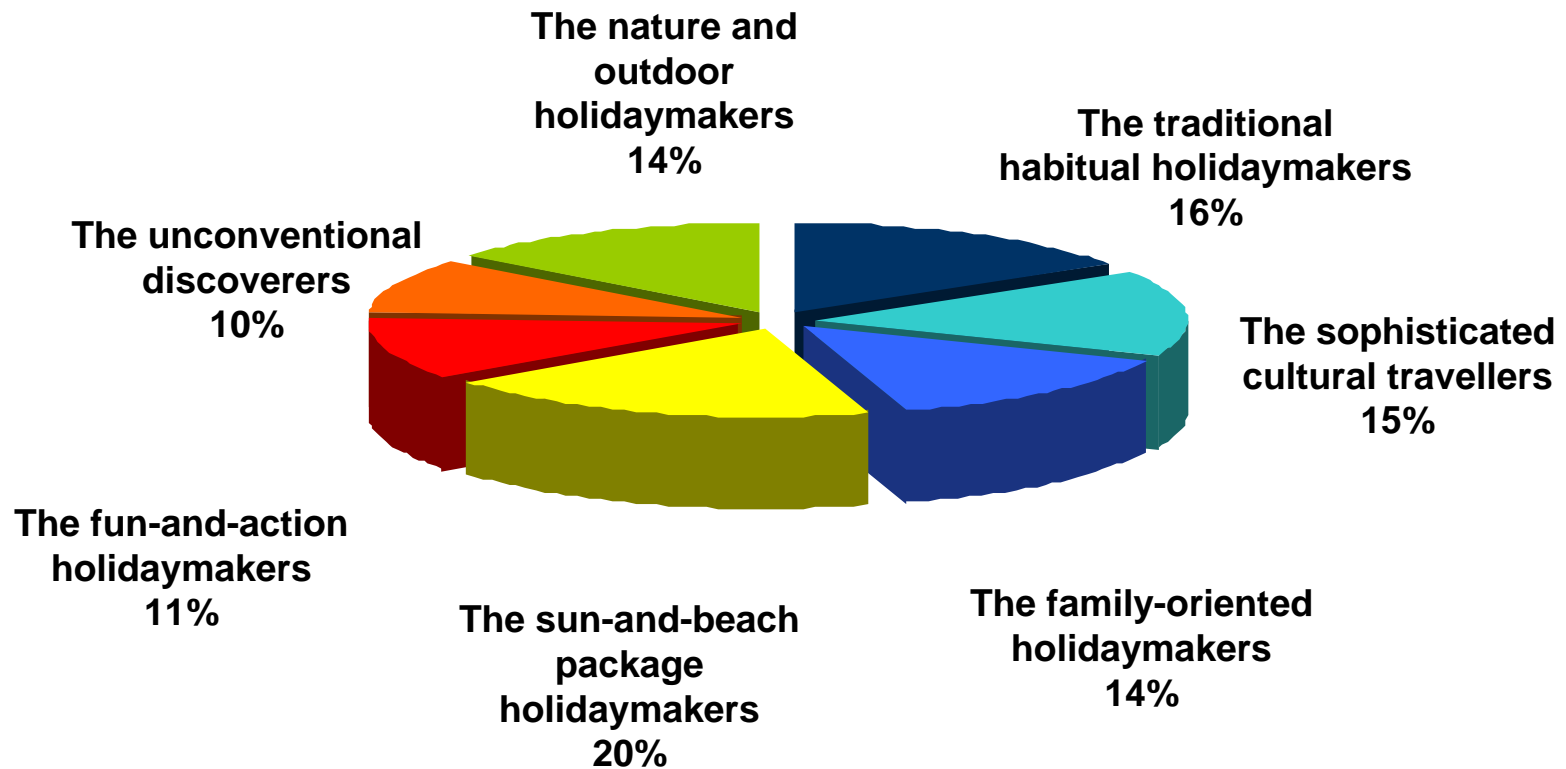
- Sample: **2000**
- Face-to-face interviews

3. Qualitative Phase

- 4 focus groups to test the attractiveness of the tourism offers developed in the project

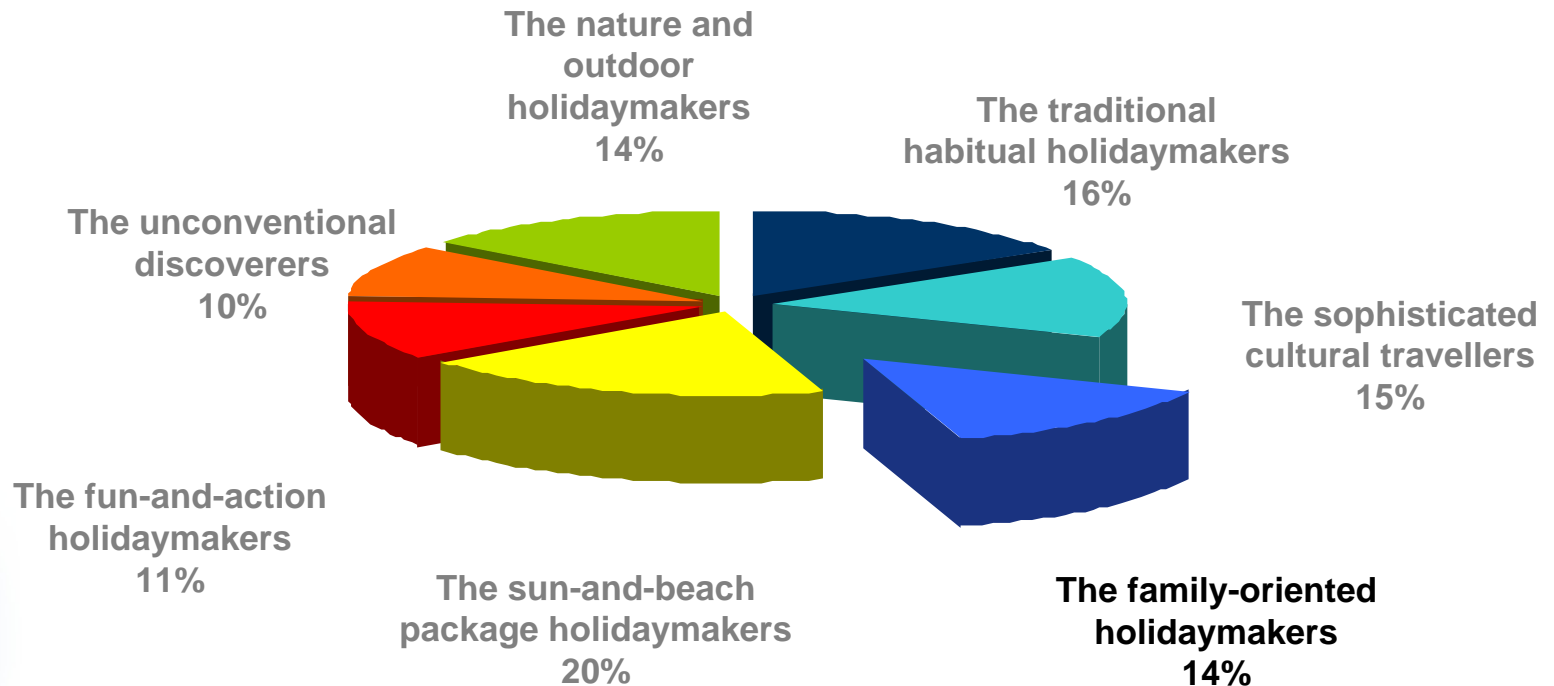


HOLIDAY AND TRAVEL STYLES





THE FAMILY-ORIENTATED HOLIDAYMAKERS 14 %





FAMILY-ORIENTATED SOCIODEMOGRAPHY AND LIFESTYLE

- Around two-thirds are **women**
 - Age-focus: 30-50
 - The part-time employed and housewives are over-represented
 - **Middle to high household incomes**
- ➔ **Great importance of family values.**



FAMILY-ORIENTATED

TRAVEL ORIENTATION AND TYPES OF HOLIDAY

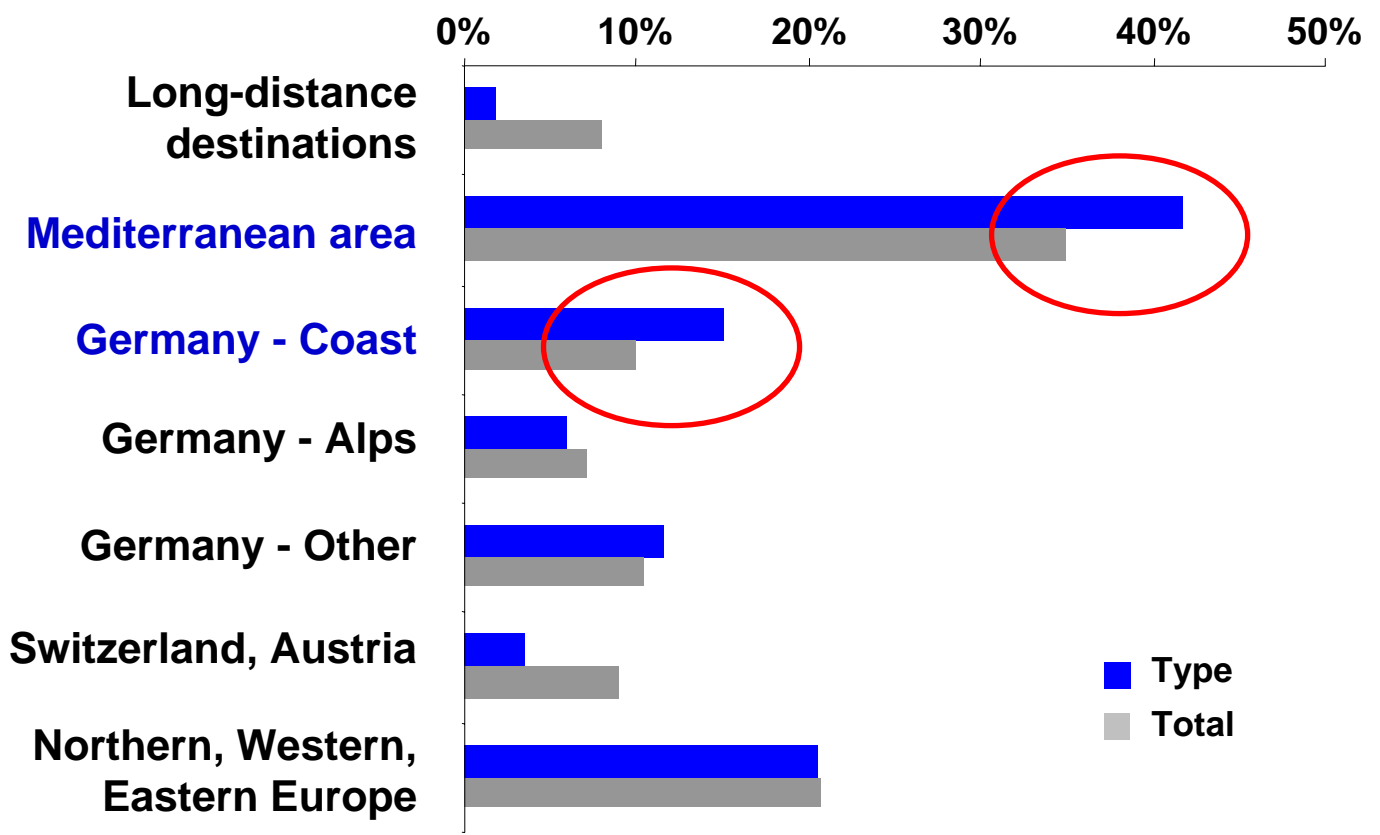
- The most important factor is suitability for families and children
- Desire for release from responsibilities, „lazing around“
- ... also through special programmes for children

➔ **Clear holiday favourites: beach holidays and pleasure trips**

➔ **Key demand: rest and relaxation, experiences with family.**

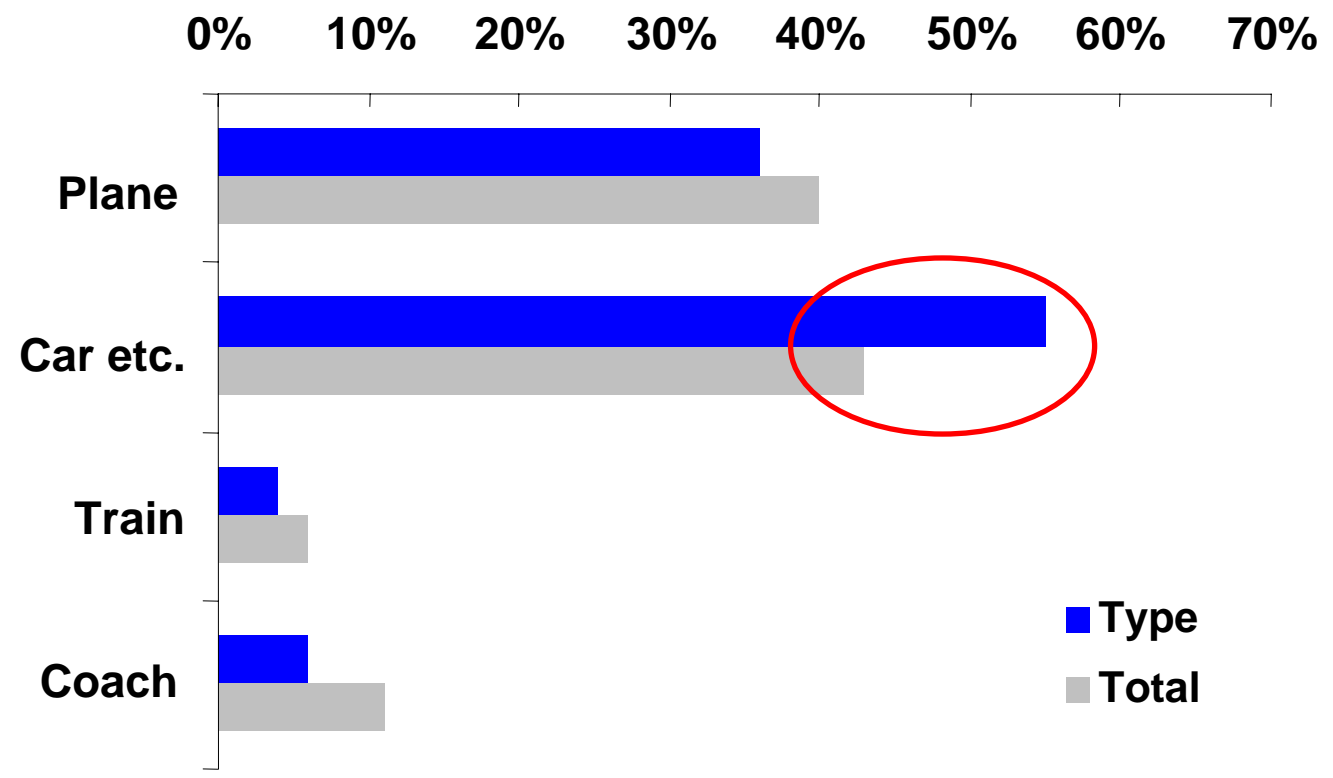


FAMILY-ORIENTED TRAVEL DESTINATIONS



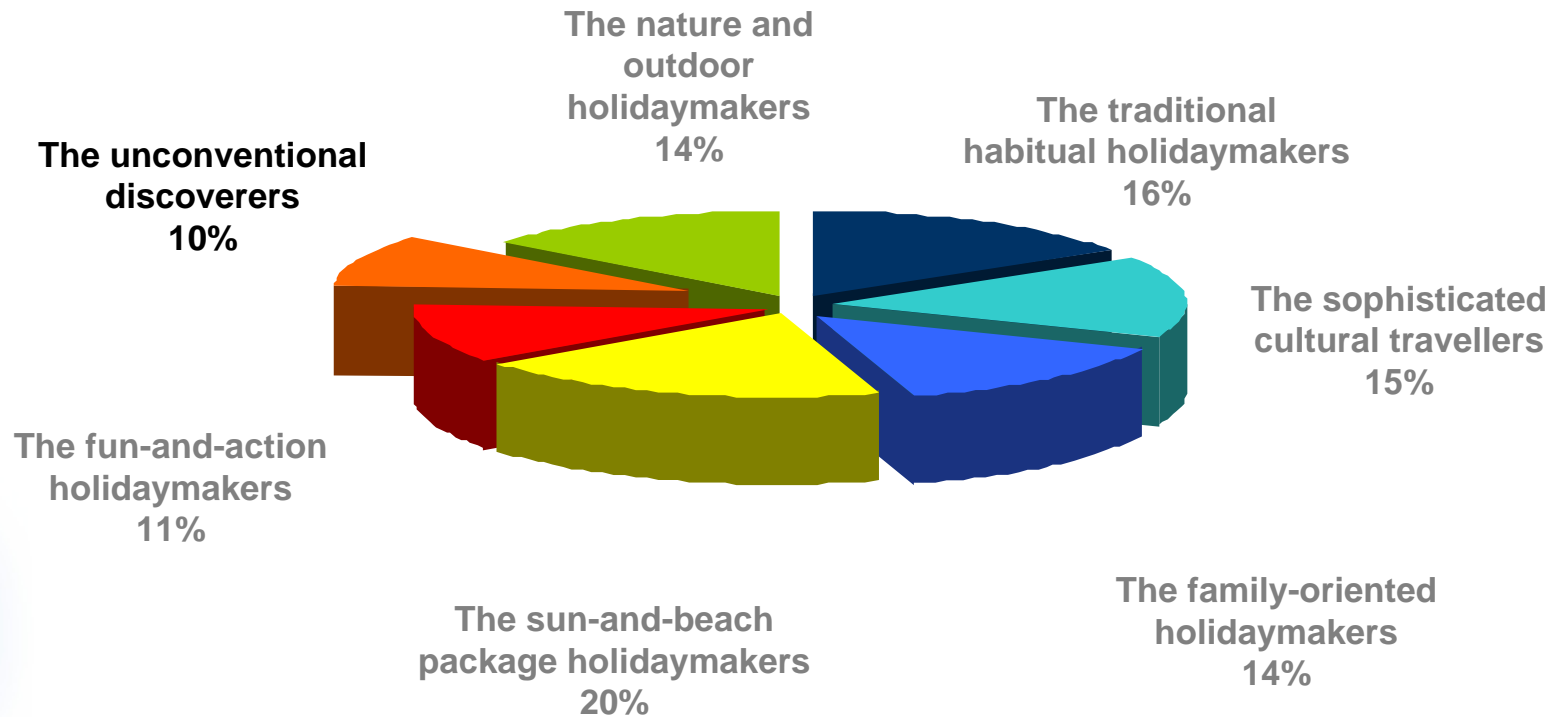


FAMILY-ORIENTED TRANSPORTATION FOR THE JOURNEY





THE UNCONVENTIONAL DISCOVERERS 10 %





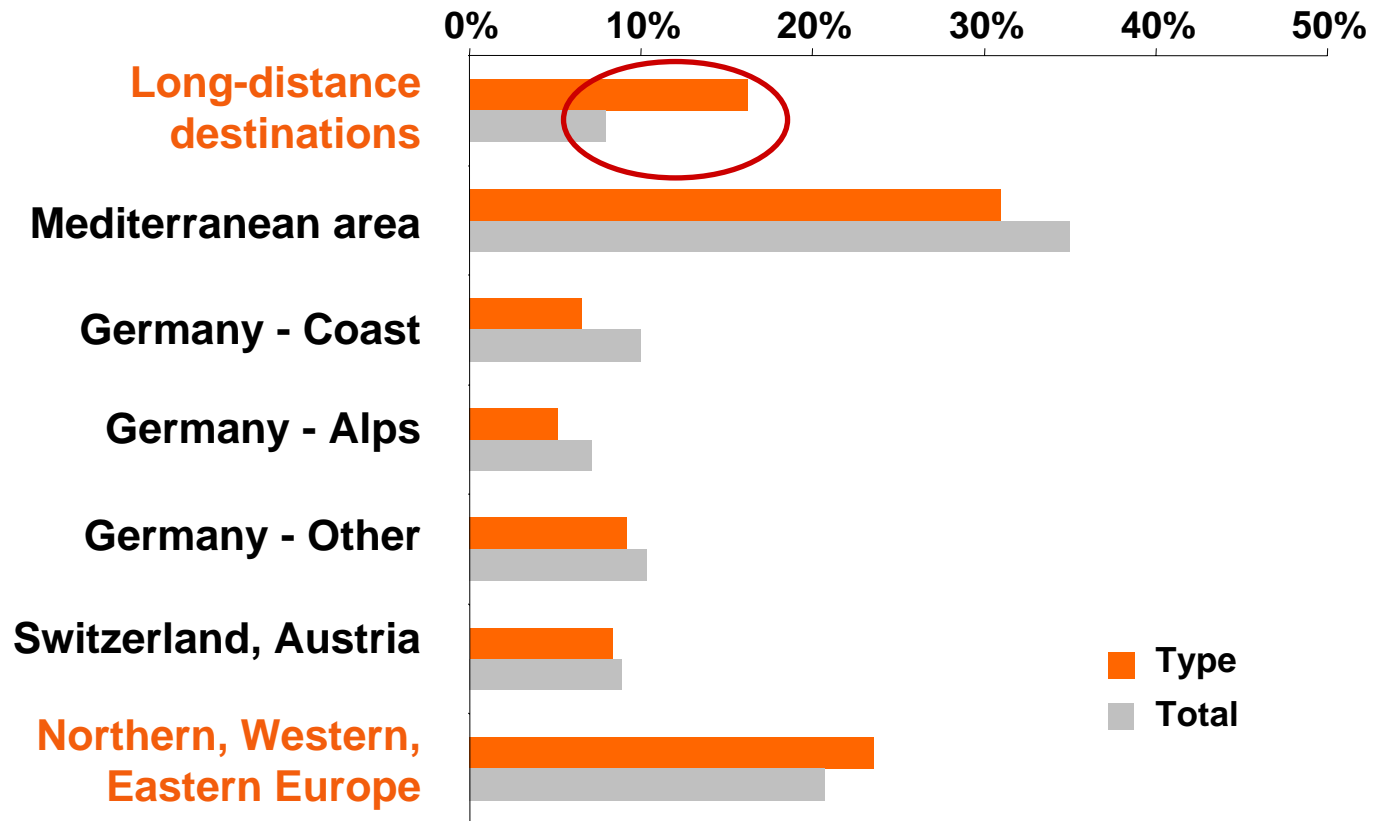
UNCONVENTIONAL DISCOVERERS

TRAVEL ORIENTATION AND TYPES OF HOLIDAY

- Globetrotters beyond the mainstream
 - Great readiness to experience the new and to get to know foreign cultures
 - Lower standards of cleanliness, service and comfort are accepted
 - Interest in the customs of the country and in contact with local people
- ➔ **Holiday preferences: individual tours, study tours and city trips.**

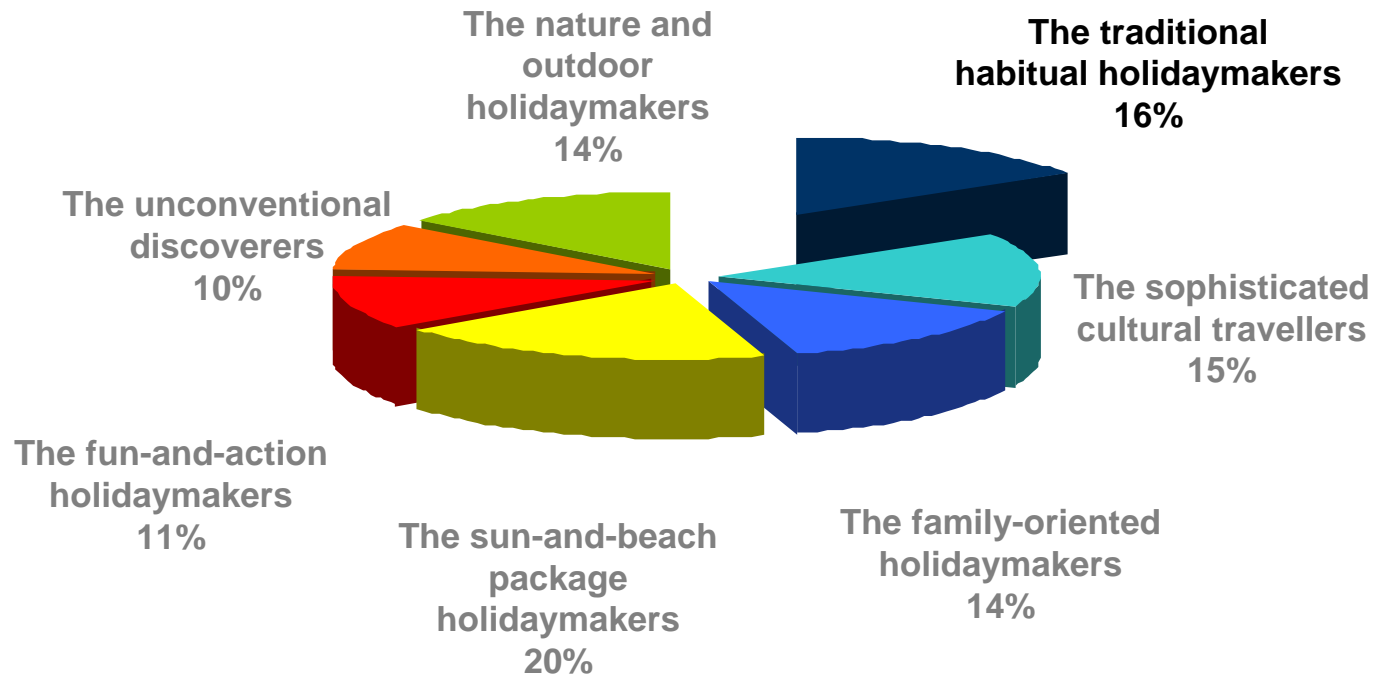


UNCONVENTIONAL DISCOVERERS TRAVEL DESTINATIONS





THE TRADITIONAL HABITUAL HOLIDAYMAKERS 16 %





TRADITIONAL HABITUAL HOLIDAYMAKERS SOCIODEMOGRAPHY AND LIFESTYLE

- More **women** than men
 - The majority is older than 60
 - Modest school qualifications
 - Many **pensioners**
 - Low level of income
- ➔ **Basic orientation: simplicity, security, and conventionalism.**



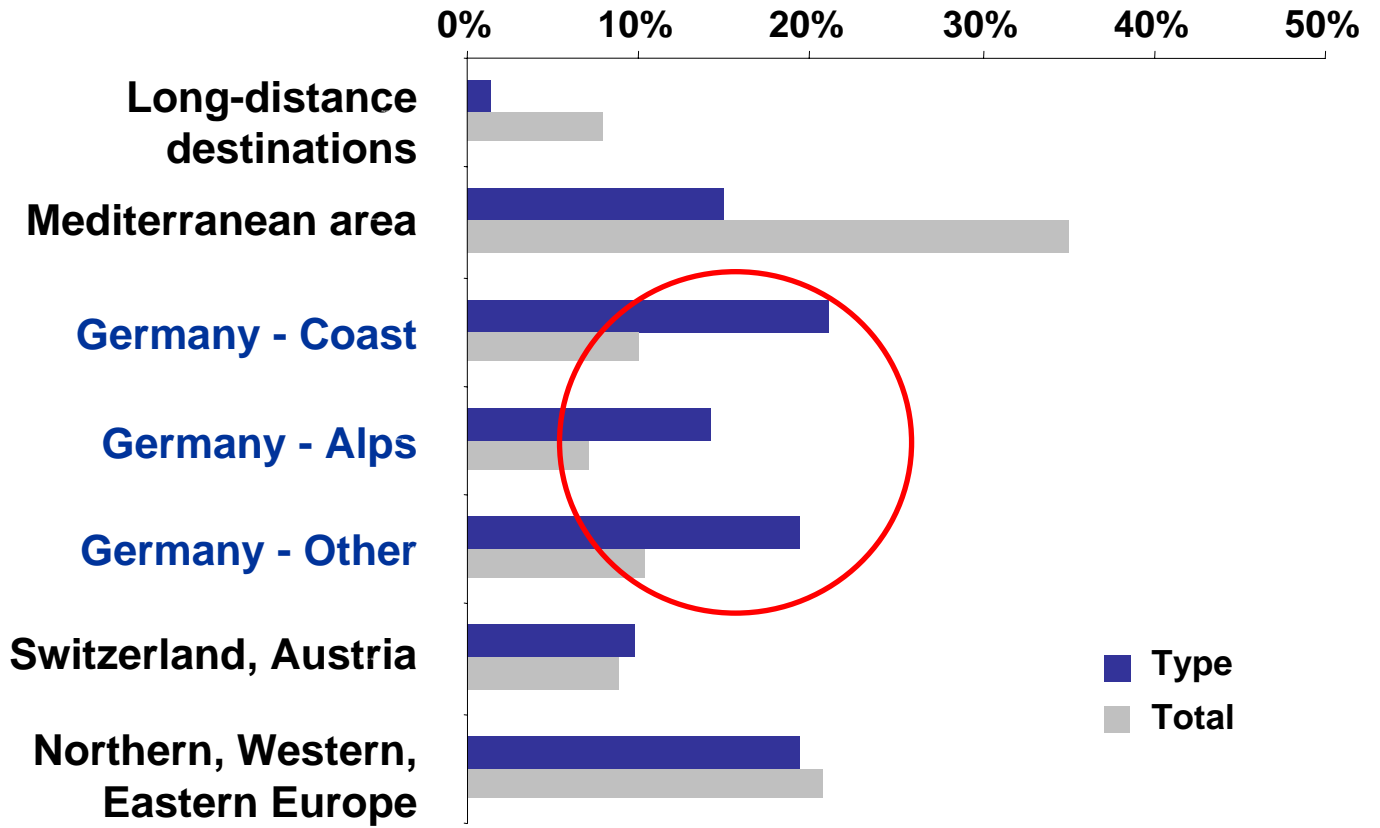
TRADITIONAL HABITUAL HOLIDAYMAKERS TRAVEL ORIENTATION AND TYPES OF HOLIDAY

- Familiar and accustomed destinations
- Security of holiday destination and cleanliness of accommodation
- Prefer holidays in German-speaking countries
- Insecurity with respect to foreign countries and cultures

➔ Traditional target group for holidays in Germany.

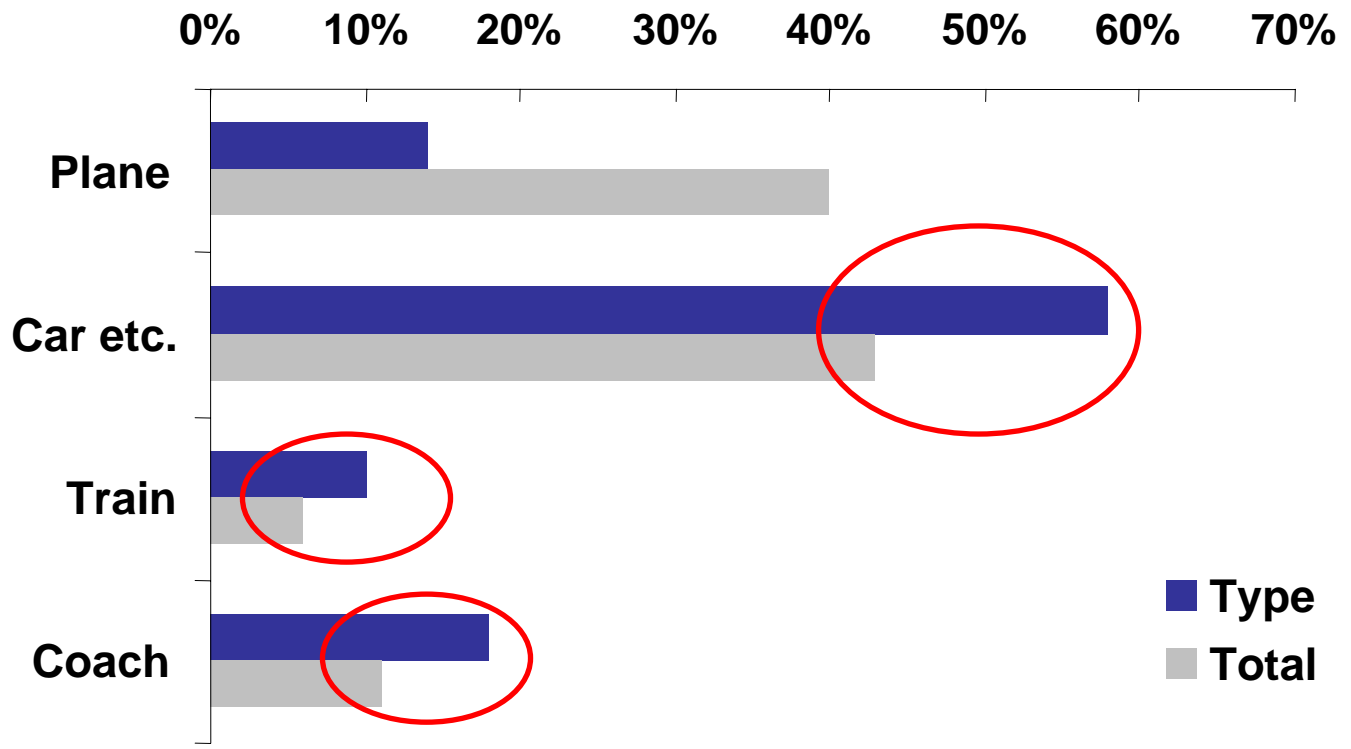


TRADITIONAL HABITUAL HOLIDAYMAKERS TRAVEL DESTINATIONS



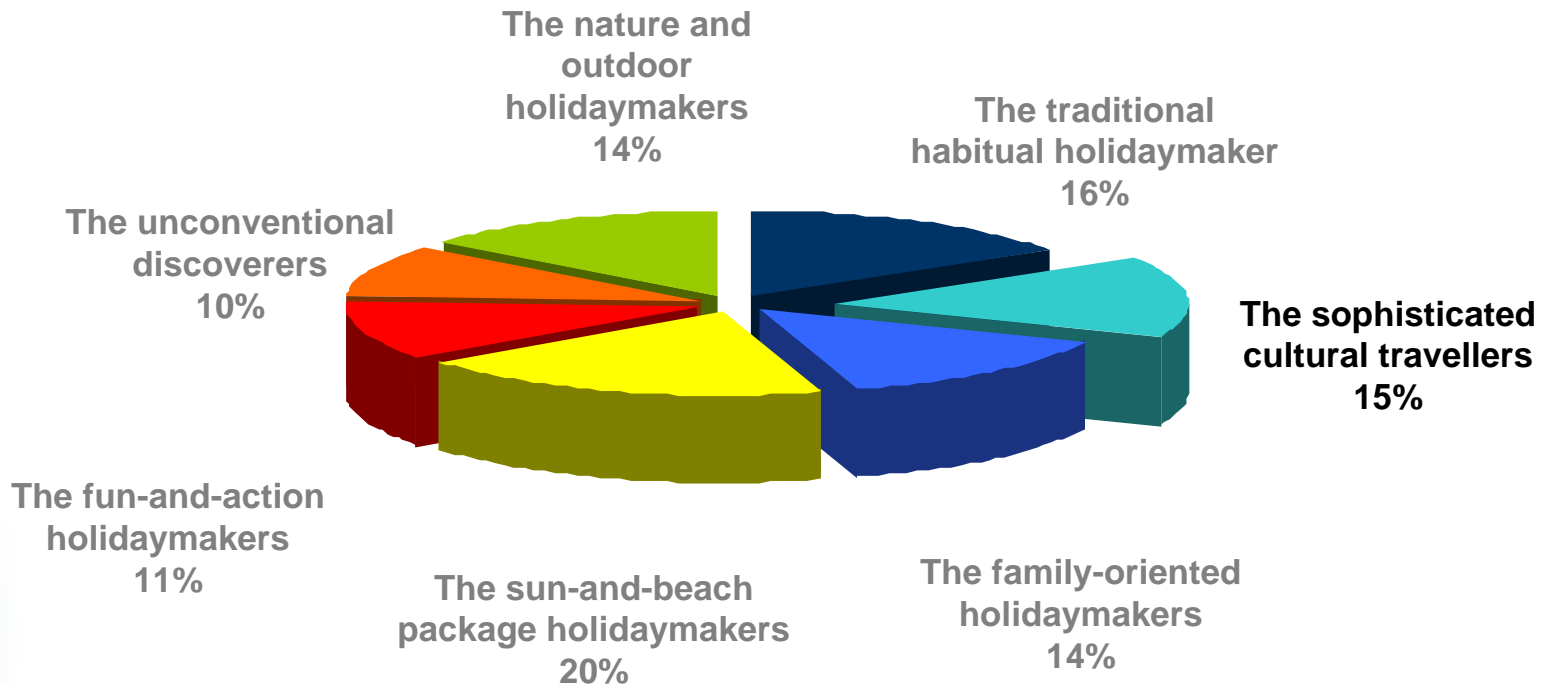


TRADITIONAL HABITUAL HOLIDAYMAKERS TRANSPORTATION FOR THE JOURNEY





THE SOPHISTICATED CULTURAL TRAVELLERS 15 %





SOPHISTICATED CULTURAL TRAVELLERS SOCIODEMOGRAPHY AND LIFESTYLE

- Age groups **over 50** are over-represented
 - High level of education
 - Above-average: civil servants and self-employed as well as retired people
 - **Middle and high income**
- ➔ **Strongly developed cultural interests**
- ➔ **Sensitive for ecological and social issues.**



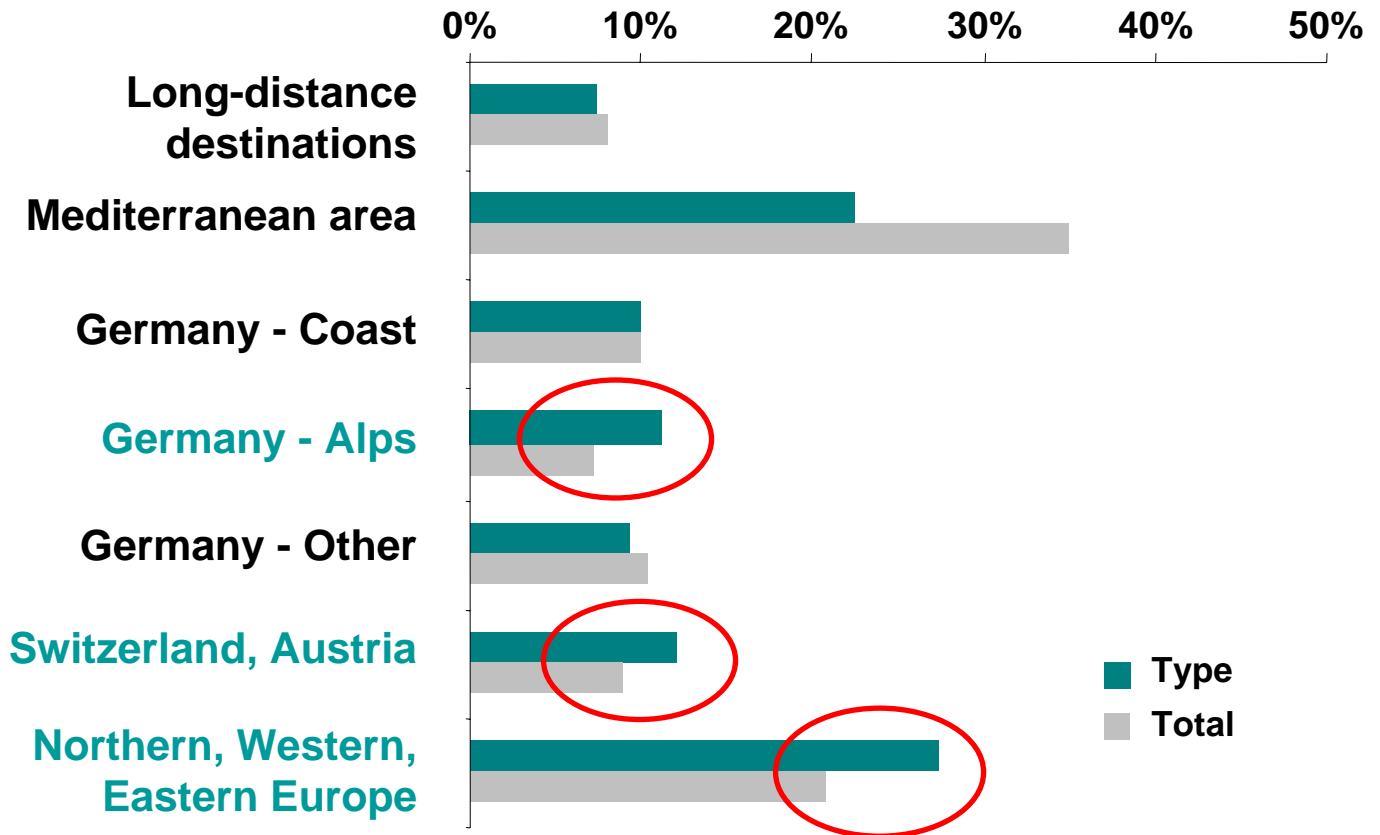
SOPHISTICATED CULTURAL TRAVELLERS

TRAVEL ORIENTATION AND TYPES OF HOLIDAY

- Interest in and respect for other cultures, adaptation to the culture of the country
 - Interest in the ecological and social sustainability
 - Appreciation of service and comfort
- ➔ **Preferred types of holiday:
in the countryside / in the mountains, cultural trips,
individual tours.**

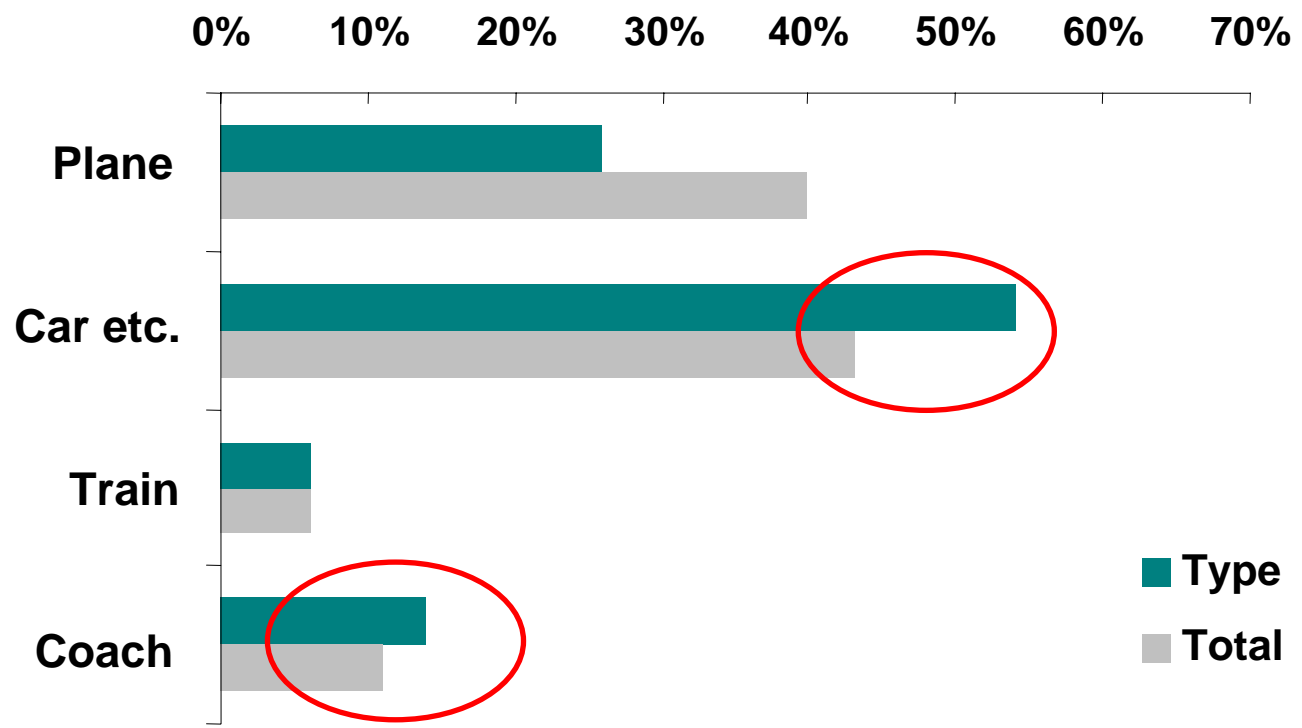


SOPHISTICATED CULTURAL TRAVELLERS TRAVEL DESTINATIONS



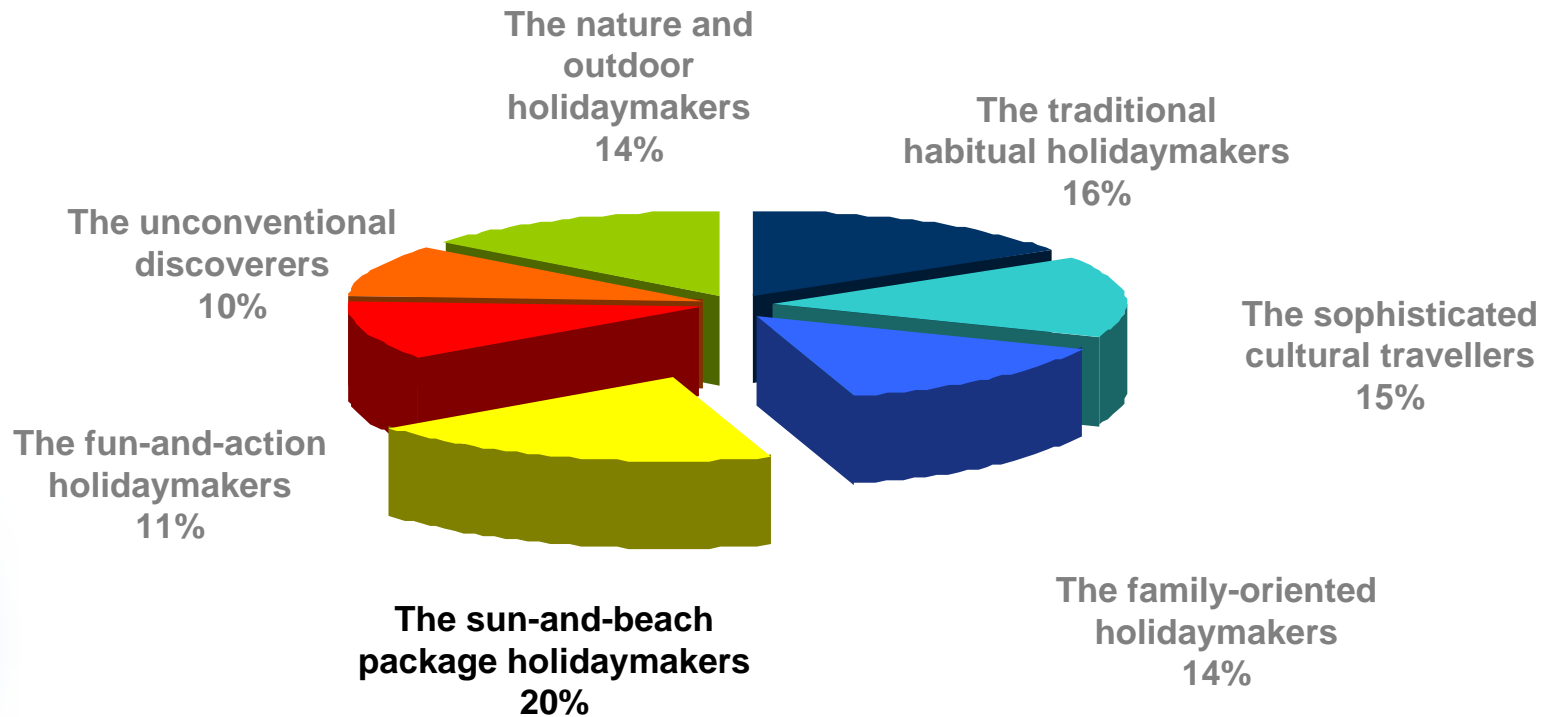


SOPHISTICATED CULTURAL TRAVELLERS TRANSPORTATION FOR THE JOURNEY





THE SUN-AND-BEACH PACKAGE HOLIDAYMAKERS 20 %





SUN-AND-BEACH PACKAGE HOLIDAYMAKERS SOCIODEMOGRAPHY AND LIFESTYLE

- Middle aged groups are over-represented
 - Modest and middle education
 - Below-average income
- ➔ **Outfit and appearance play an important role**
- ➔ **Desire for something special within a conventional setting.**



SUN-AND-BEACH PACKAGE HOLIDAYMAKERS TRAVEL ORIENTATION AND TYPES OF HOLIDAY

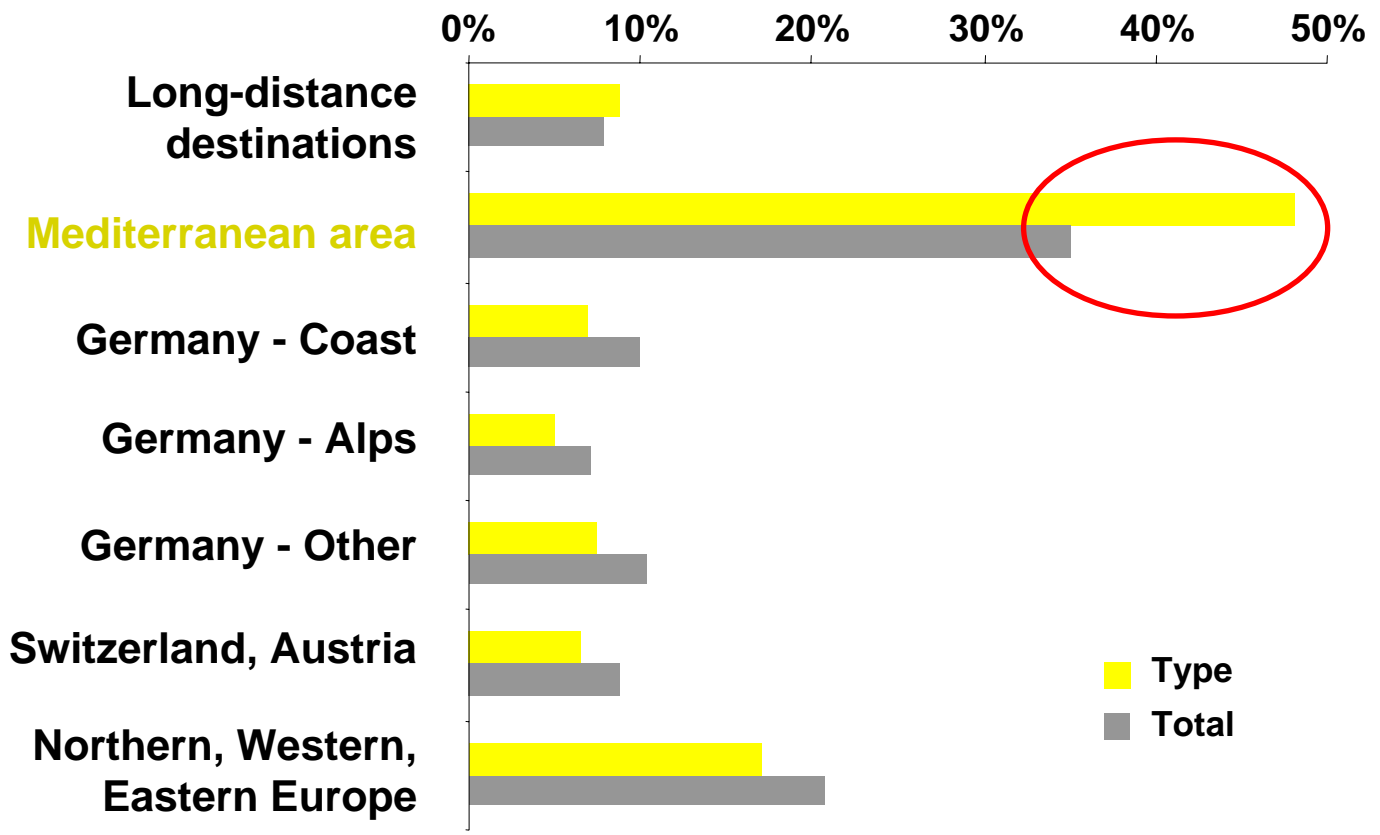
- Key demands: summer, sun, beach
- One wants to have nothing to do, and to be spoiled
- Appreciation of good service and comfort
- Desire for thoroughly-organized and dependable holiday offers
- Value for money is the key factor

➔ **Preferences: beach holidays and pleasure trips**

➔ **All-inclusive offers.**

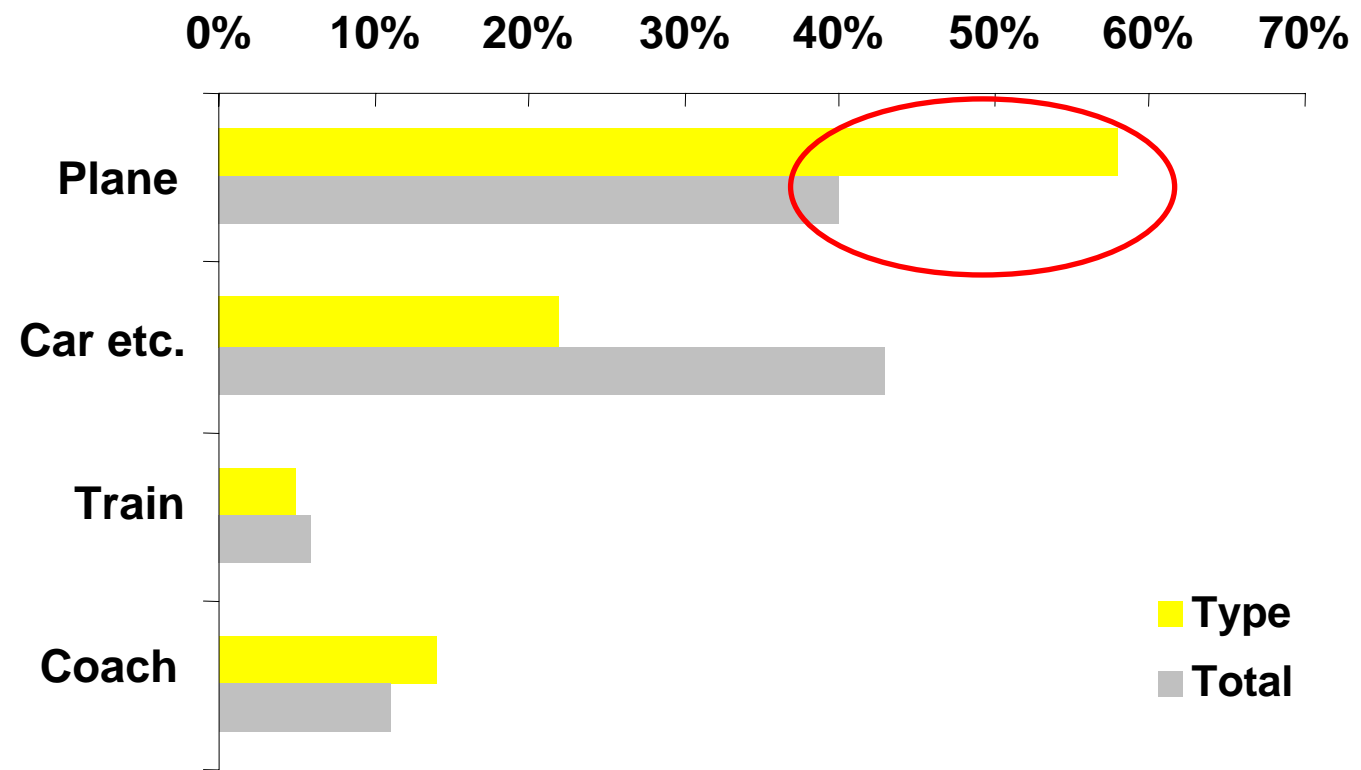


SUN-AND-BEACH PACKAGE HOLIDAYMAKERS TRAVEL DESTINATIONS



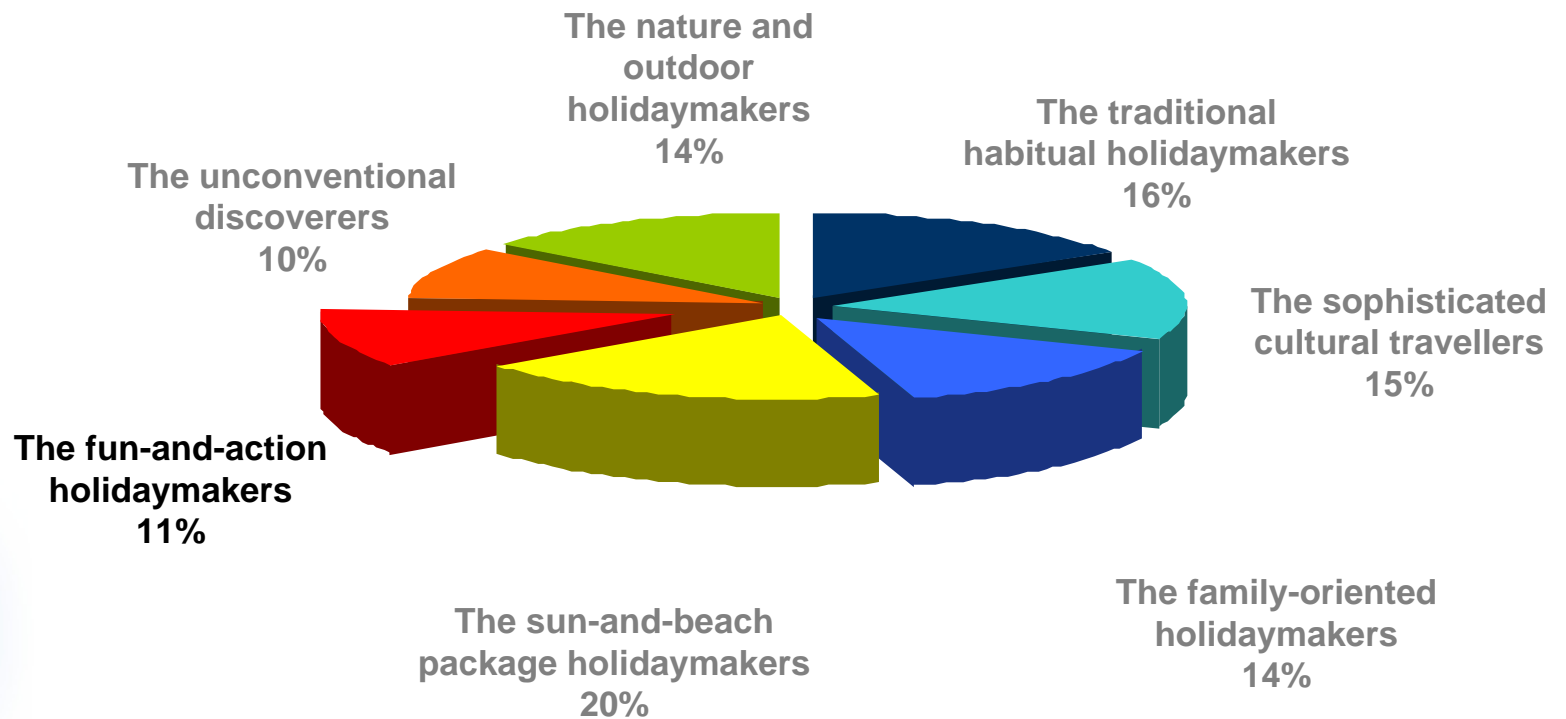


SUN-AND-BEACH PACKAGE HOLIDAYMAKERS TRANSPORTATION FOR THE JOURNEY





THE YOUNG FUN & ACTION HOLIDAYMAKERS 11 %





YOUNG FUN & ACTION HOLIDAYMAKERS SOCIODEMOGRAPHY AND LIFESTYLE

- Youngest group
- Around two-thirds are men
- The majority are single and live alone
- Average education
- Below-average income

**→ Egocentric and hedonistic:
experience something new**

→ Go for fun, action, flirt.



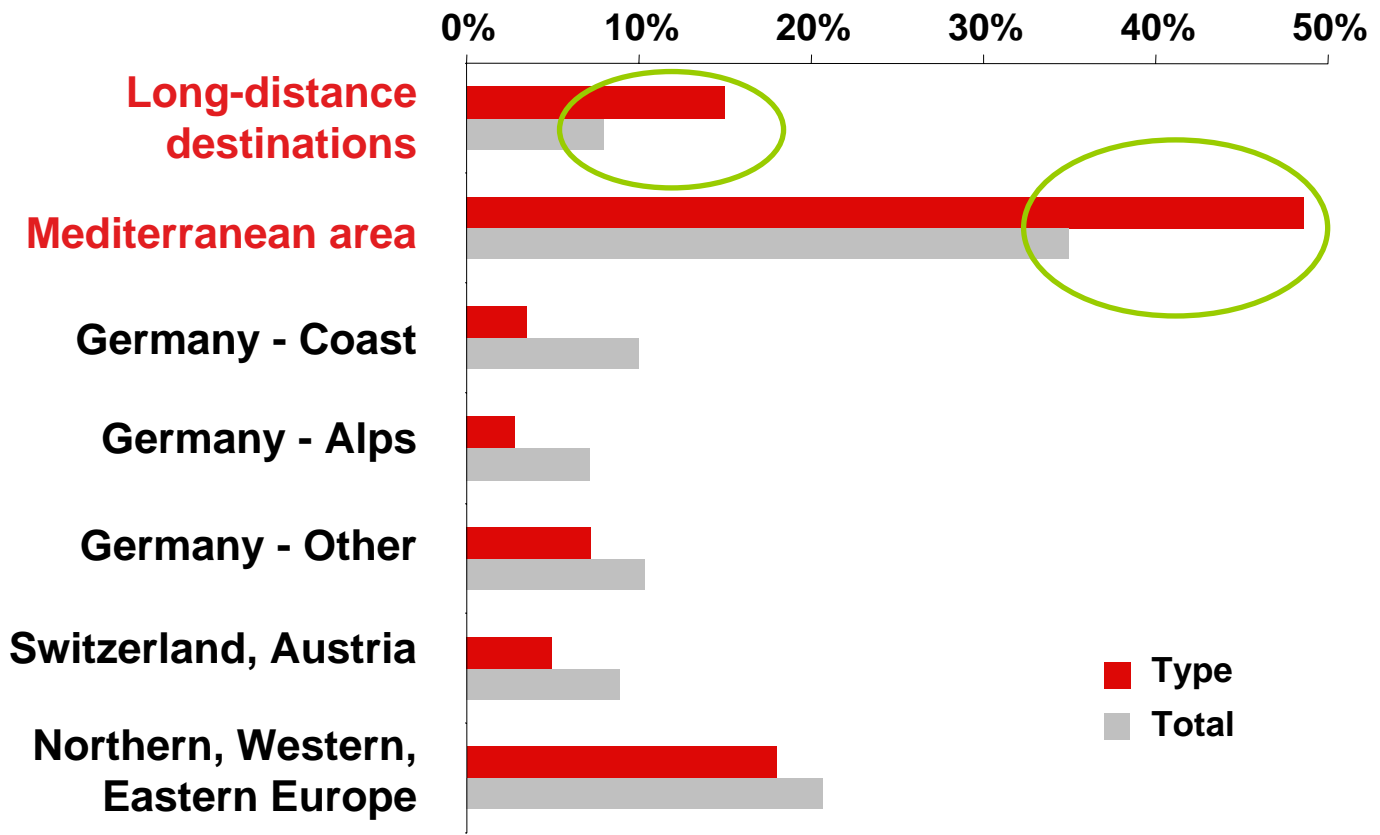
YOUNG FUN & ACTION HOLIDAYMAKERS

TRAVEL ORIENTATION AND TYPES OF HOLIDAY

- Action, sport, and variety
 - Beach-life and sport during the day, parties at night
 - Holiday as the chance to meet people
 - Clear orientation towards price and special offers
- ➔ Inexpensive beach holiday with an attractive night life**
- ➔ In addition: city and shopping trips as well as sport and fitness holidays.**



YOUNG FUN & ACTION HOLIDAYMAKERS TRAVEL DESTINATIONS 2002 AND 2003





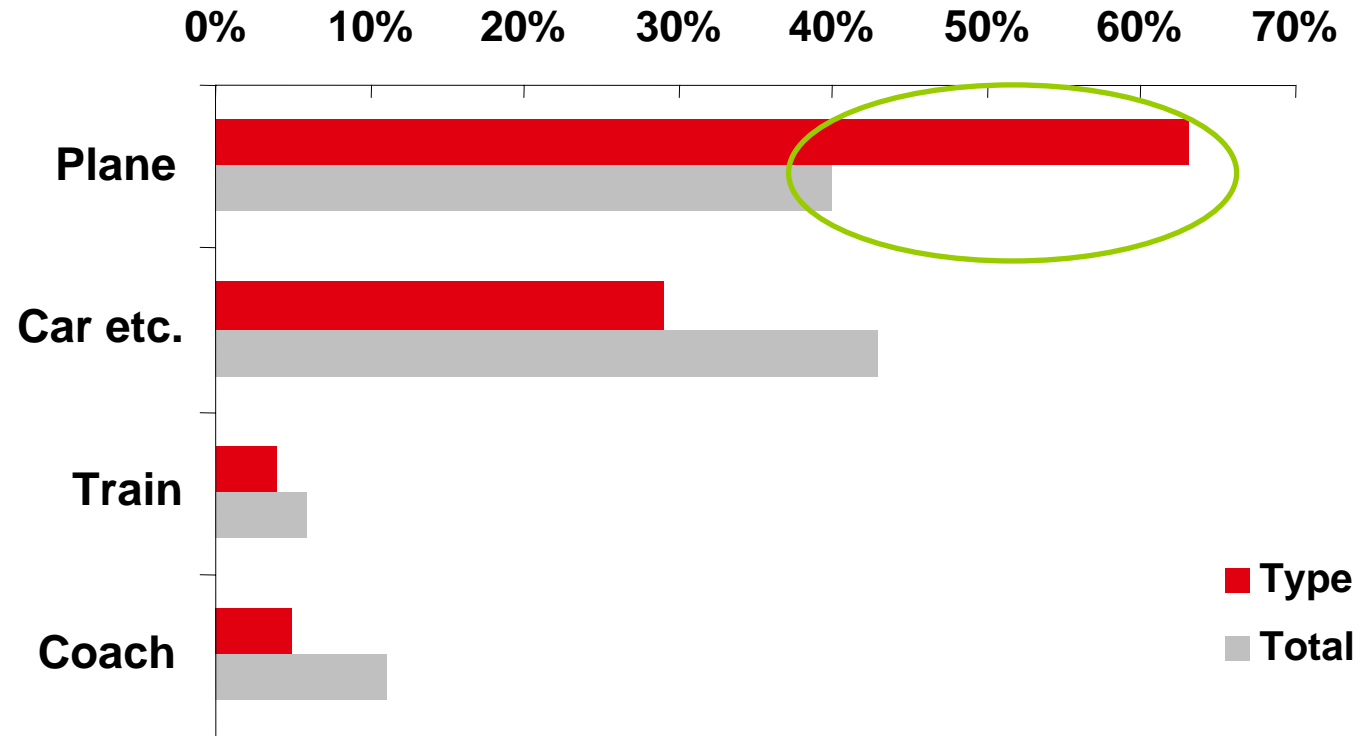
YOUNG FUN & ACTION HOLIDAYMAKERS TRAVEL BEHAVIOUR

- Preference is to book a complete holiday
- ... and this mostly at short notice
- Journey: above all by plane
- Accommodation: primarily in hotels / hotel complexes, clubs are over-represented

➔ Target group for last-minute offers and all-inclusive holidays with an action packed programme.

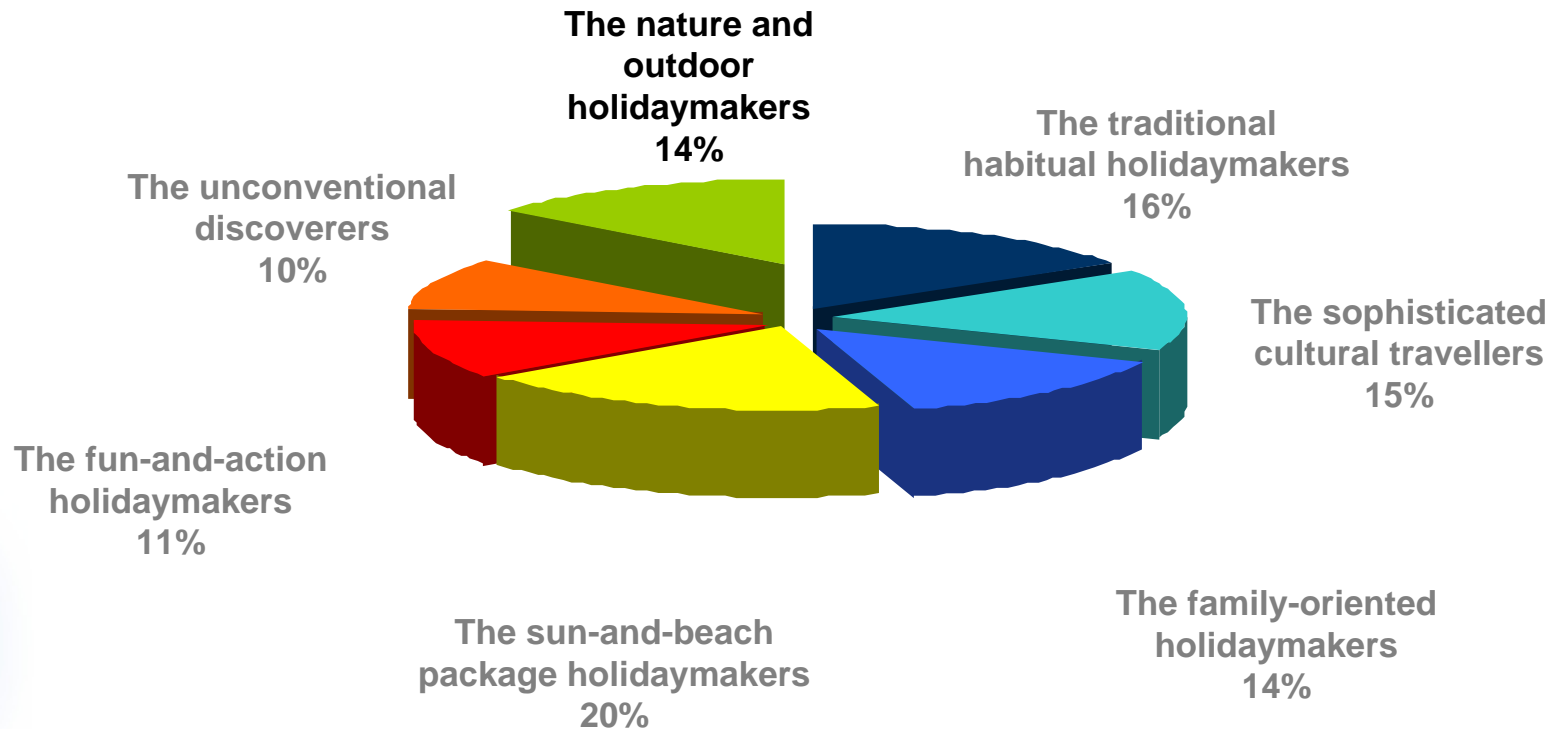


YOUNG FUN & ACTION HOLIDAYMAKERS TRANSPORTATION FOR THE JOURNEY





THE NATURE AND OUTDOOR HOLIDAYMAKERS 14 %





NATURE AND OUTDOOR HOLIDAYMAKERS SOCIODEMOGRAPHY AND LIFESTYLE

- Average sociodemographic profile with a slight trend towards young and middle age-groups
 - Households with **children** are slightly over-represented
 - Higher and middle education, predominantly employed
 - **Middle to high income**
- **Modern appreciation of ecology combined with social involvement.**

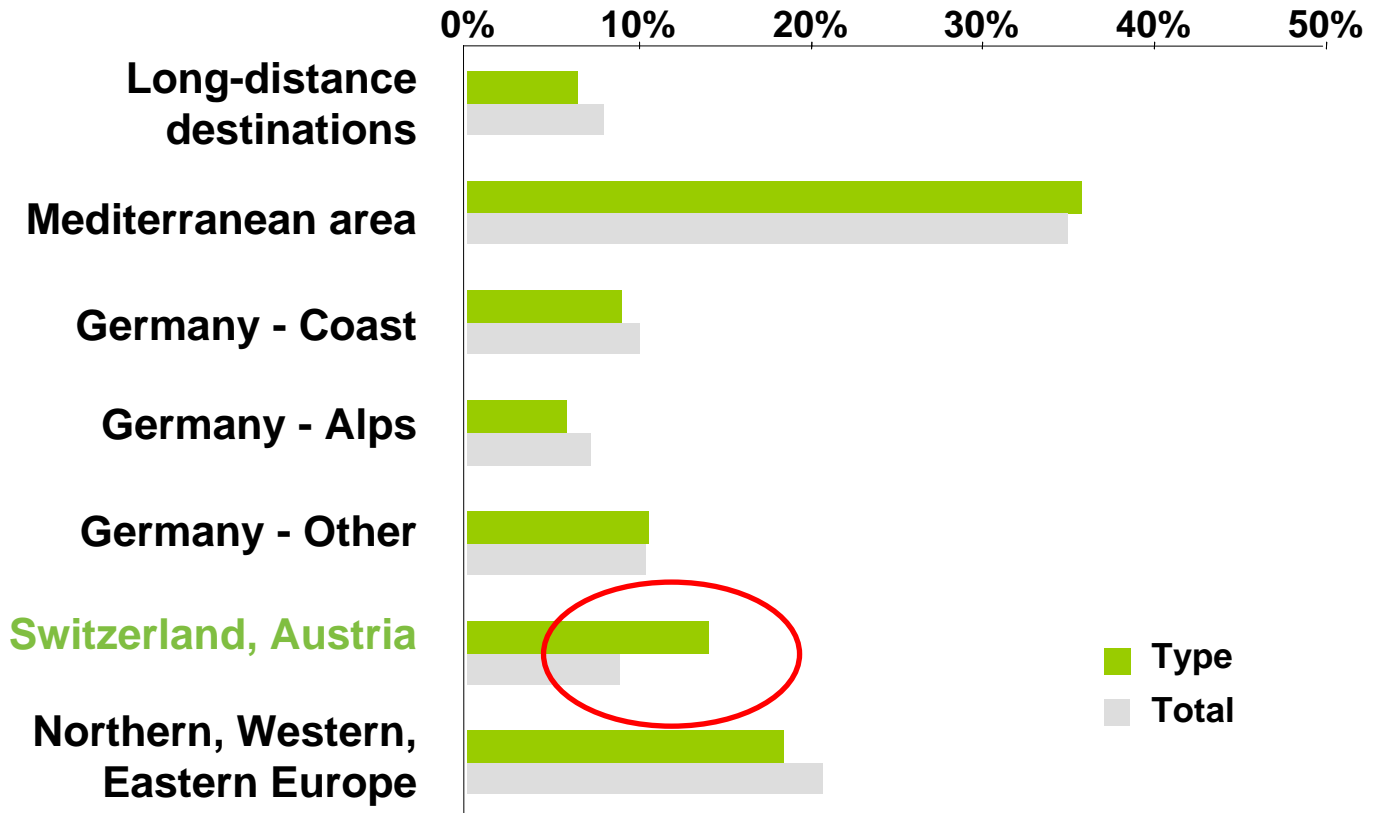


NATURE AND OUTDOOR HOLIDAYMAKERS TRAVEL ORIENTATION AND TYPES OF HOLIDAY

- Interest in sustainable holiday offers: environmentally friendly and socially just
 - For this one is prepared to spend more money
 - On holiday one looks for activity and change, sport and exercise in the fresh air
 - Combines orientation towards family and experience
- ➔ **Pleasure in an active seaside holiday**
- ➔ **Holiday in the countryside, bicycle and hiking holidays, wellness and fitness, winter holidays in the snow.**



NATURE AND OUTDOOR HOLIDAYMAKERS TRAVEL DESTINATIONS





NATURE AND OUTDOOR HOLIDAYMAKERS

➔ **Target group for modern eco-tourism:
ecology as part of an attractive holiday offer
and as prerequisite for the enjoyment of nature**



CONCLUSION (1)

- **Beneath the eco-niche there are new modern target groups for sustainable tourism in the mass market**
 - **The Nature and Outdoor Holidaymakers**
 - **The Sophisticated Cultural Travellers**
- **They wish to enjoy nature and culture**
- **A good relationship to nature is not a moral duty but a benefit**
- **For these groups sustainability can be subject of marketing – not in an abstract way but in specific qualities of the journey and the offers.**



CONCLUSION (2)

- ➔ **But there are other groups which - if sustainability is mentioned explicitly - are afraid of paying higher prices and have less fun - for example**
 - **The Sun-and-Beach Package Holidaymakers**
 - **The Fun-and-Action Holidaymakers**
- ➔ **In this target groups marketing should work with inexplicite strategies, which are shown in the other presentations.**

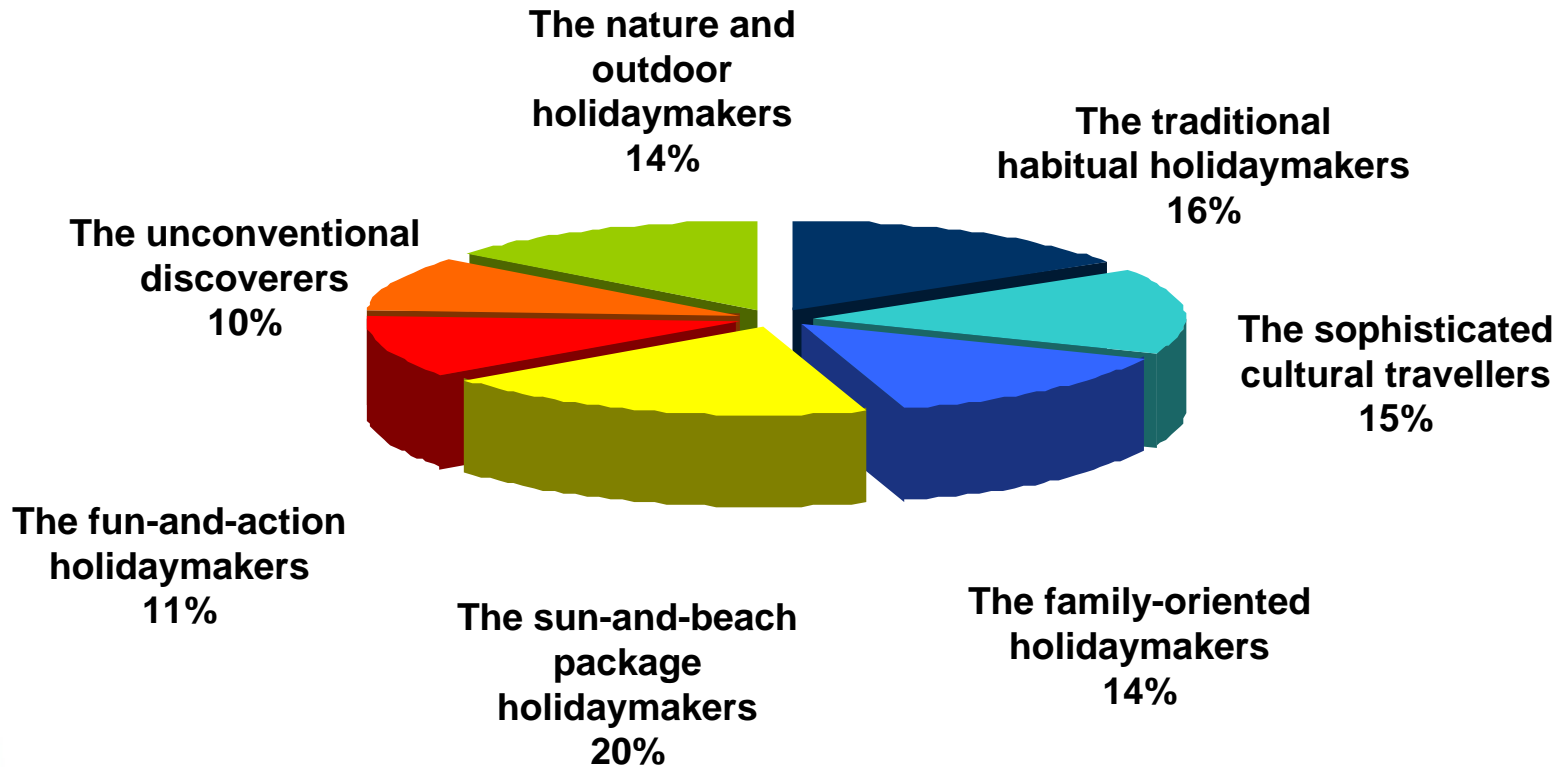


CONCLUSION (3)

- **The most important result is:**
 - There are possible strategies for all target groups in the mass market to make some steps in the direction of more sustainability**
- **This means to work consistently target group specific!**



HOLIDAY AND TRAVEL STYLES



Thank you!