

INNOVATIVE MARKETING CONCEPTS FOR SUSTAINABLE TOURISM (INVENT)

Project goals and design
Empirical findings

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for Sustainable
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Seite 1

October 2004

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Supported by the



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PROJECT GOALS

- Model development of sustainable tourism offers in collaboration with industrial and research partners:
 - Mass market groups are targeted, not eco-niche groups
 - The starting point are the desires and demands of experienced travellers (own empirical research)
 - The entire journey is considered: arrival and departure, accommodation, local activities, local mobility
 - Identify *optimization opportunities* for existing tourism offers as well as *substitution potentials* of less sustainable offers with more sustainable ones

INVENT TOURISMUS

PARTNERS



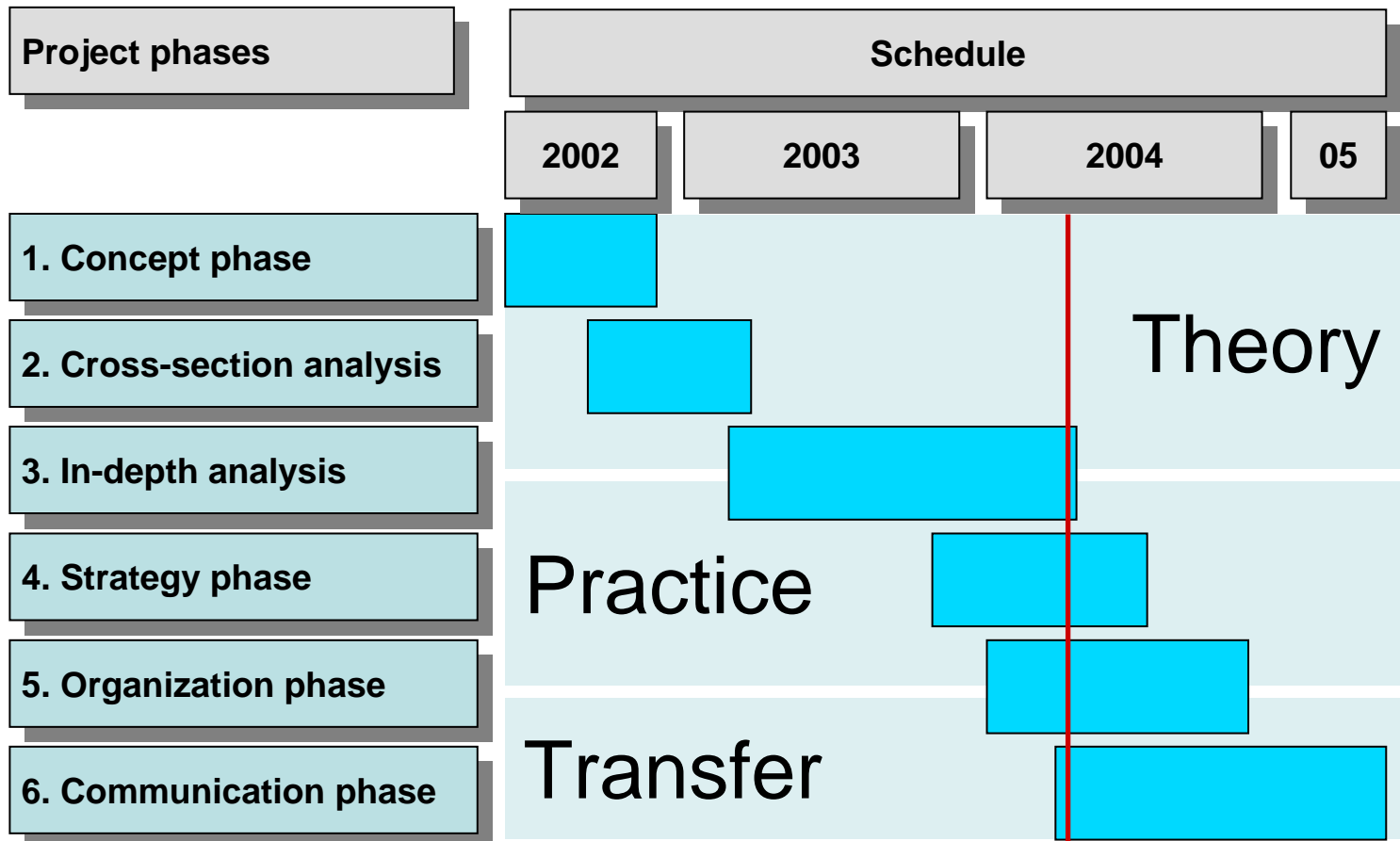
Universität Lüneburg
Tourismusmanagement



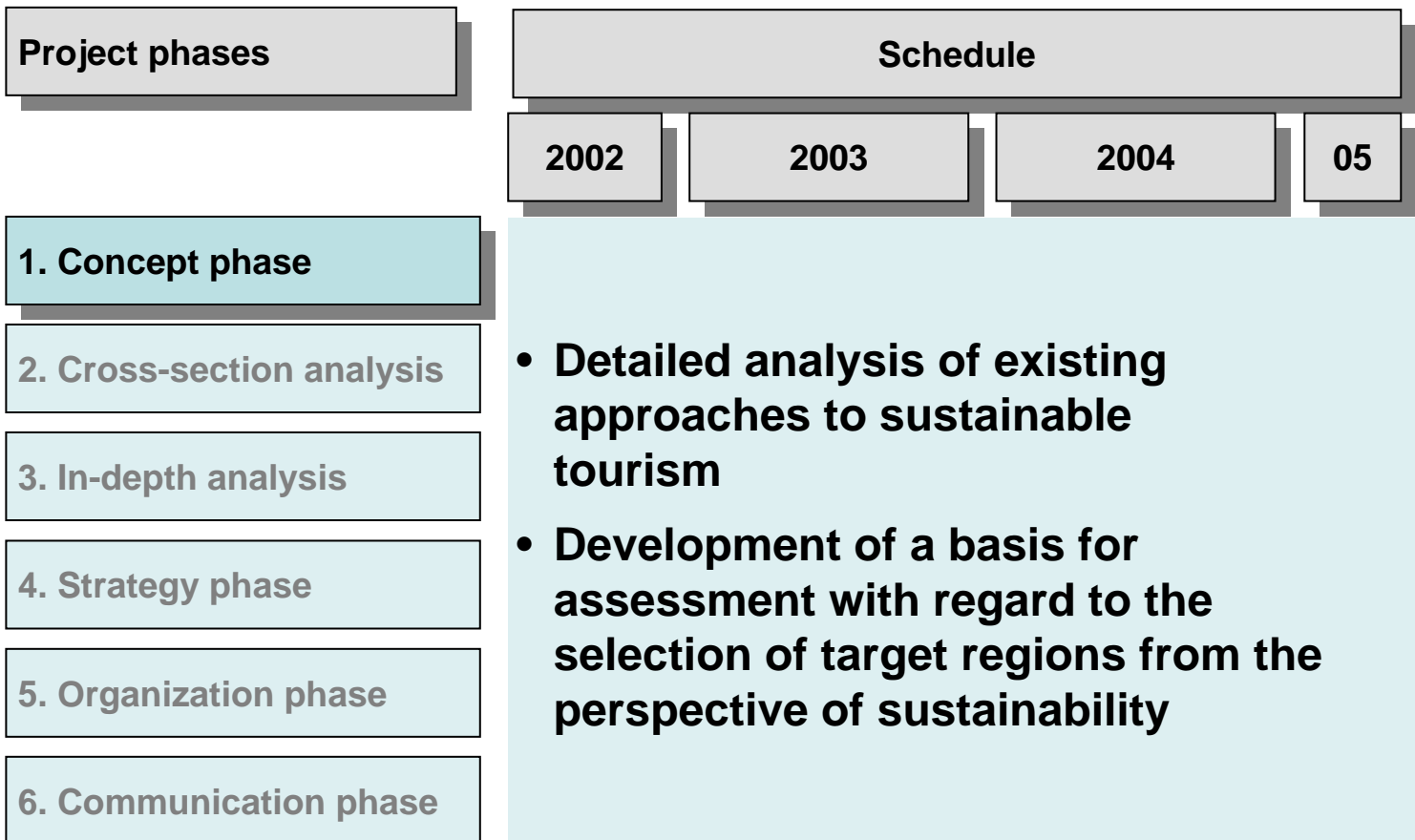
**in co-operation
with:**



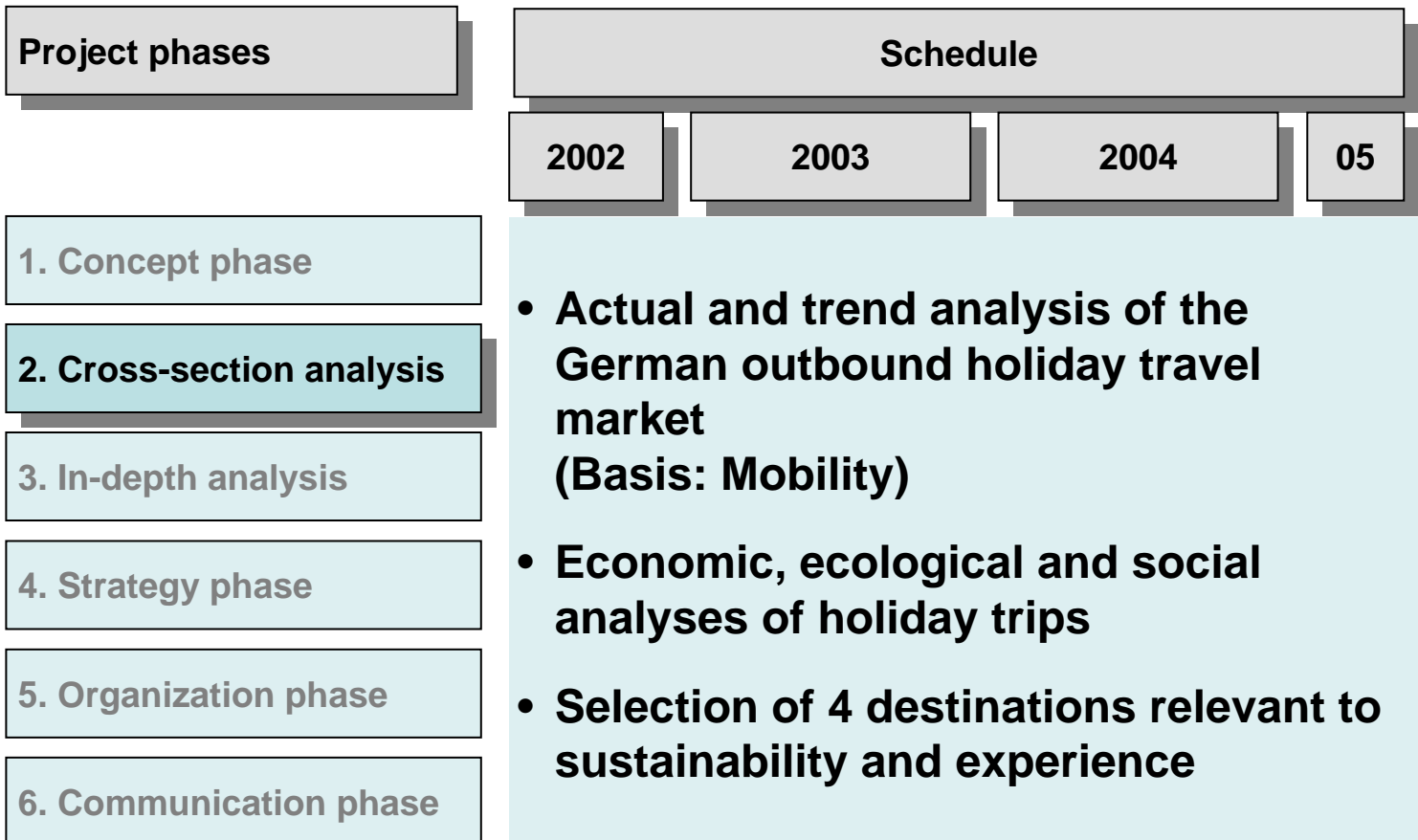
STRUCTURE OF THE RESEARCH PROJECT



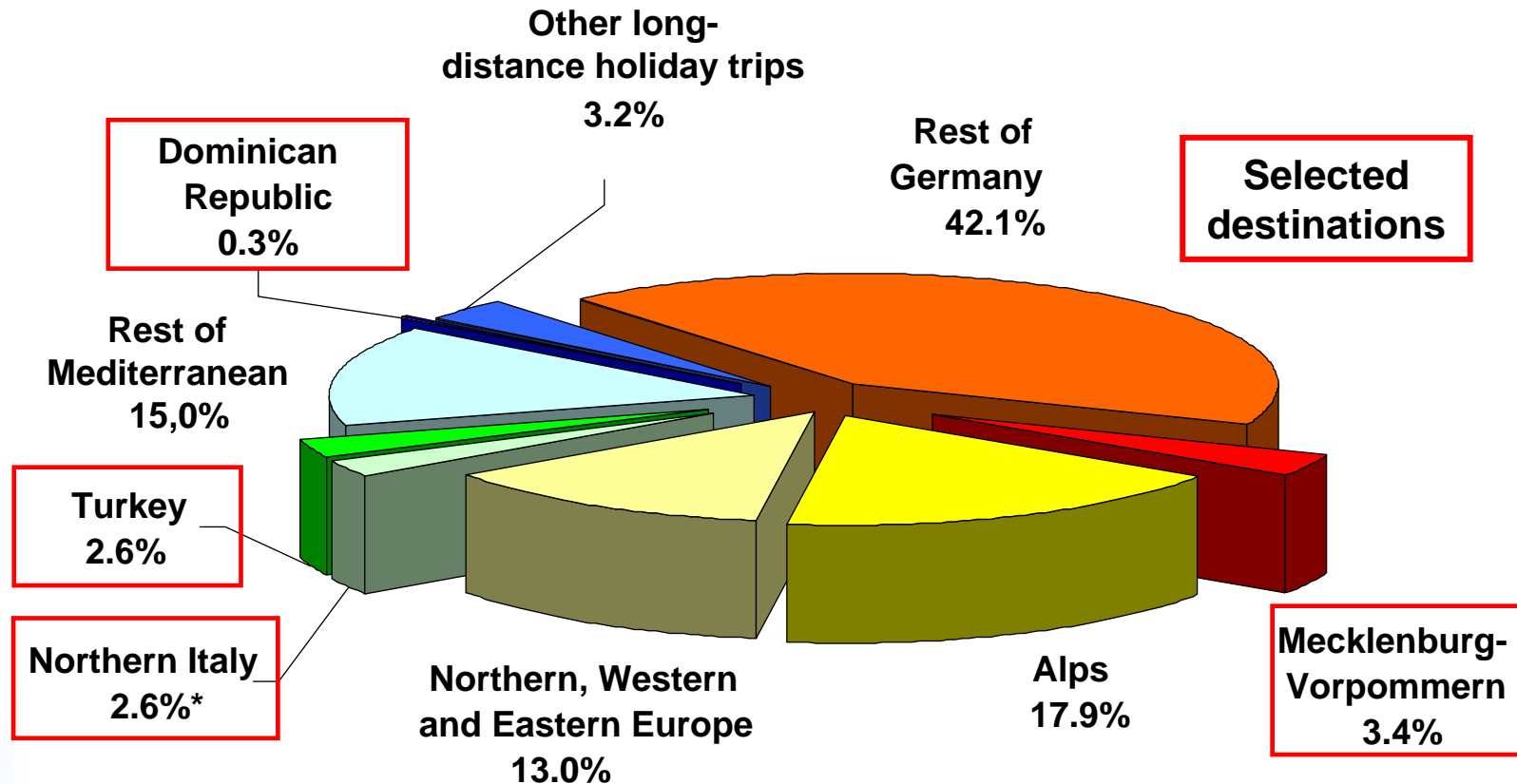
CONCEPT PHASE (PHASE 1)



CROSS-SECTION ANALYSIS (PHASE 2)



THE GERMANS' HOLIDAY TRIPS 2001 BY DESTINATIONS

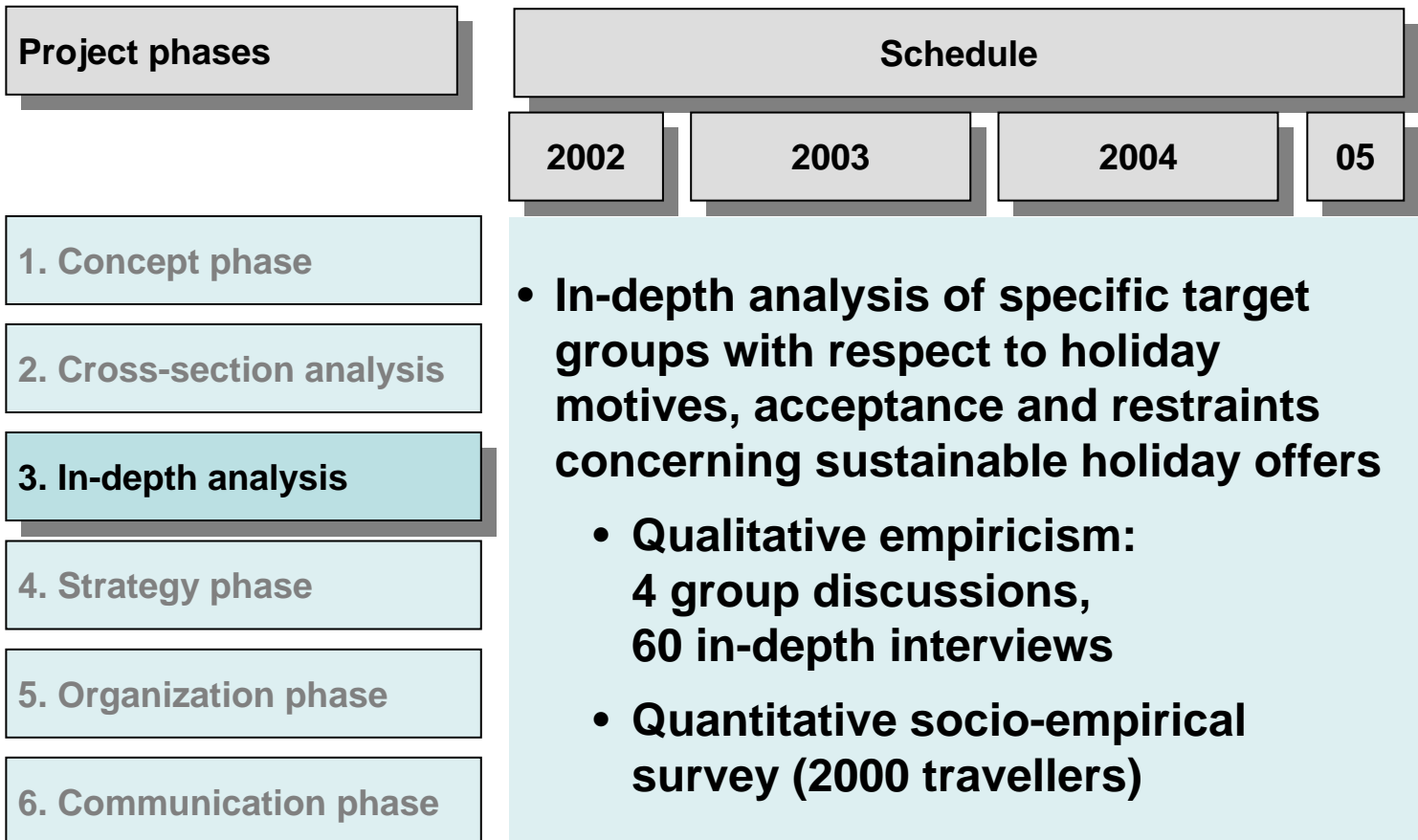


Holiday trips in total : 147.6 million.

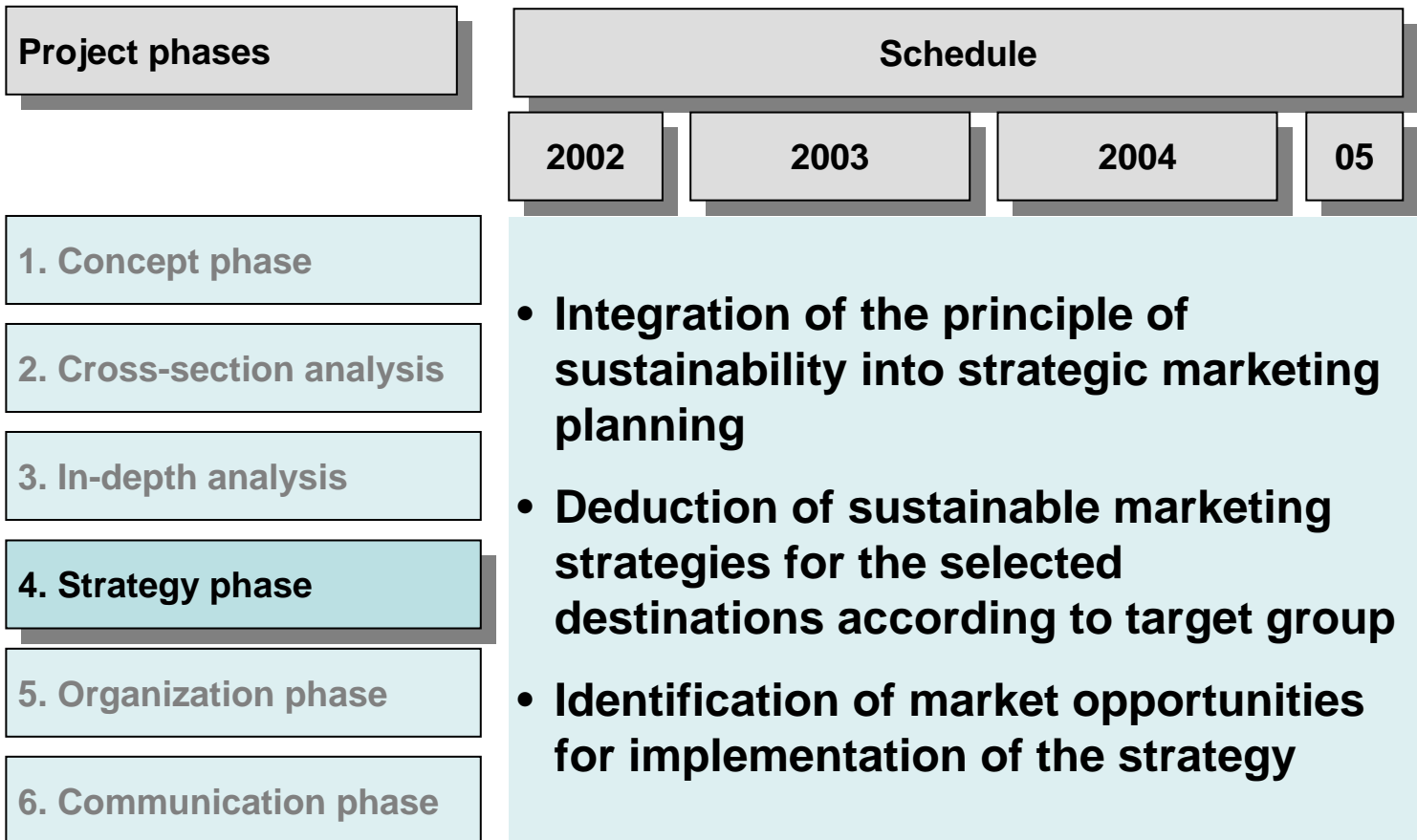
Data source: Mobility.

* without the Alps.

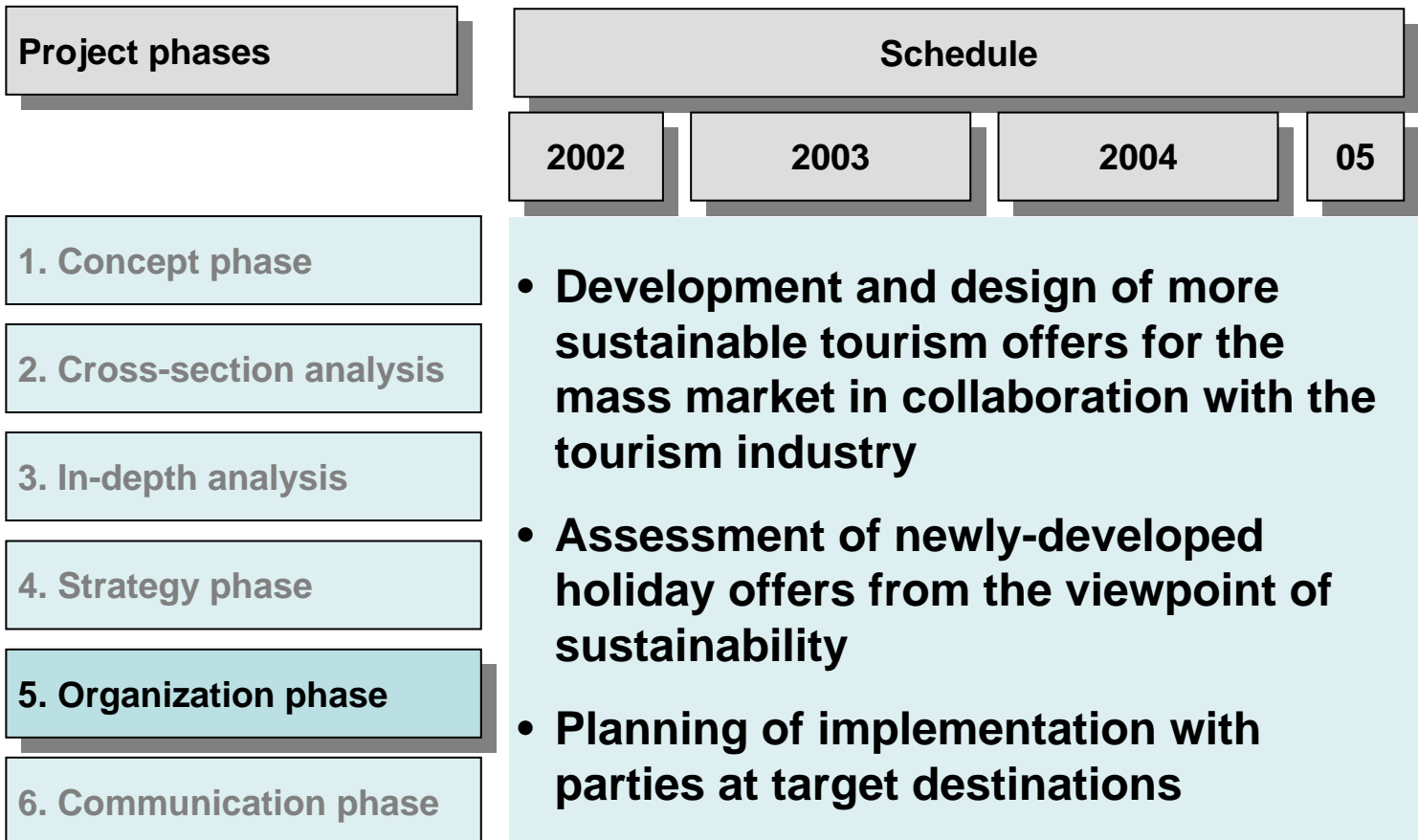
IN-DEPTH ANALYSIS (PHASE 3)



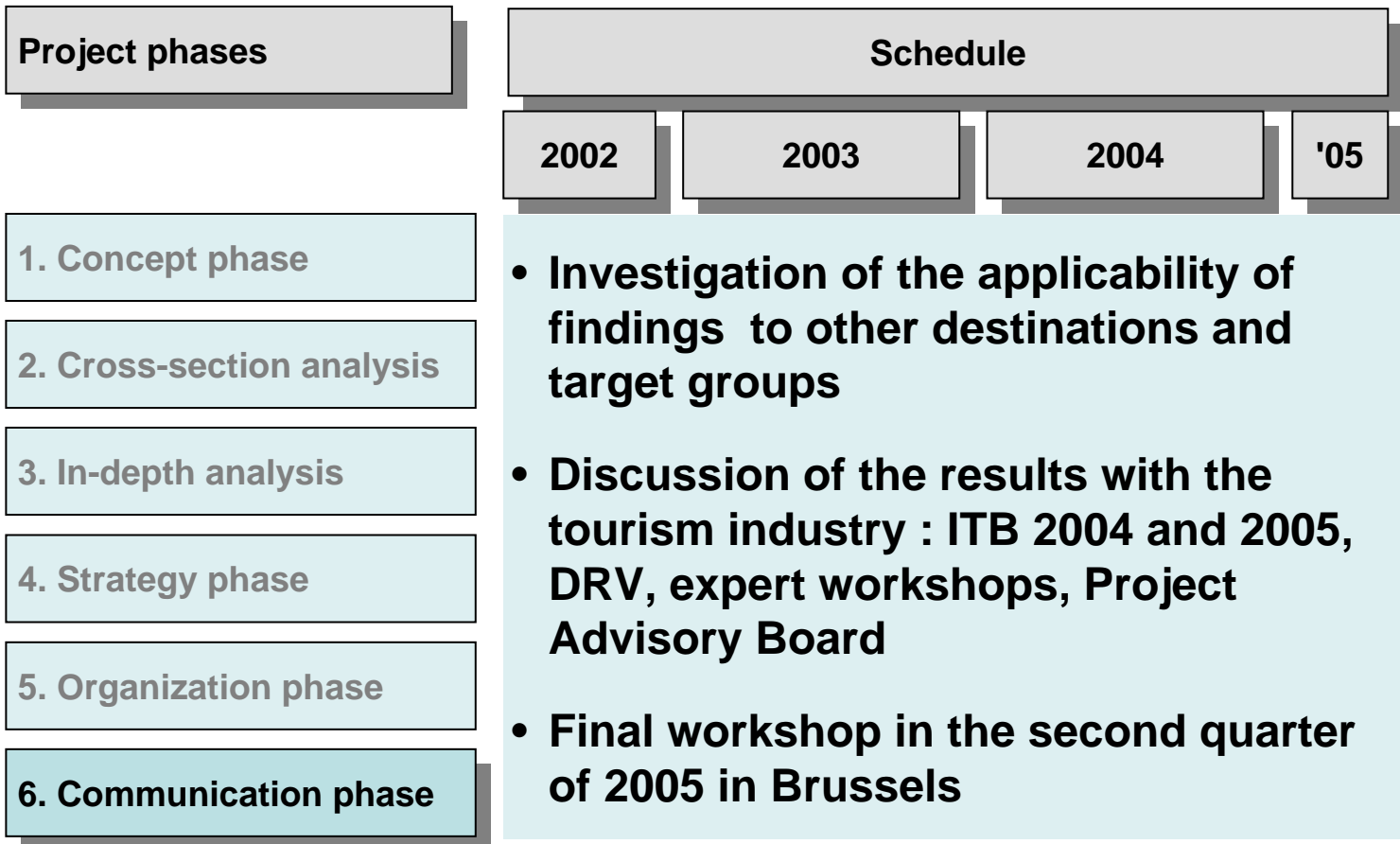
STRATEGY PHASE (PHASE 4)



ORGANIZATION PHASE (PHASE 5)



COMMUNICATION PHASE (PHASE 6)



TRAVEL AND HOLIDAY STYLES – TARGET GROUPS FOR SUSTAINABLE TOURISM

Findings of a scientific empirical investigation by the
Institute for Social-Ecological Research (ISOE) within
the framework of the INVENT project

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DEVELOPMENT OF A TARGET GROUP MODEL FOR THE TRAVEL MARKET

...which should provide insights

- into the travel behaviour, requirements and desires of the target groups as well as their motivational background
- into the attractiveness of innovative tourism offers that represent steps in the direction of sustainability
- into the substitution and optimization potential towards sustainability

RESEARCH STRUCTURE

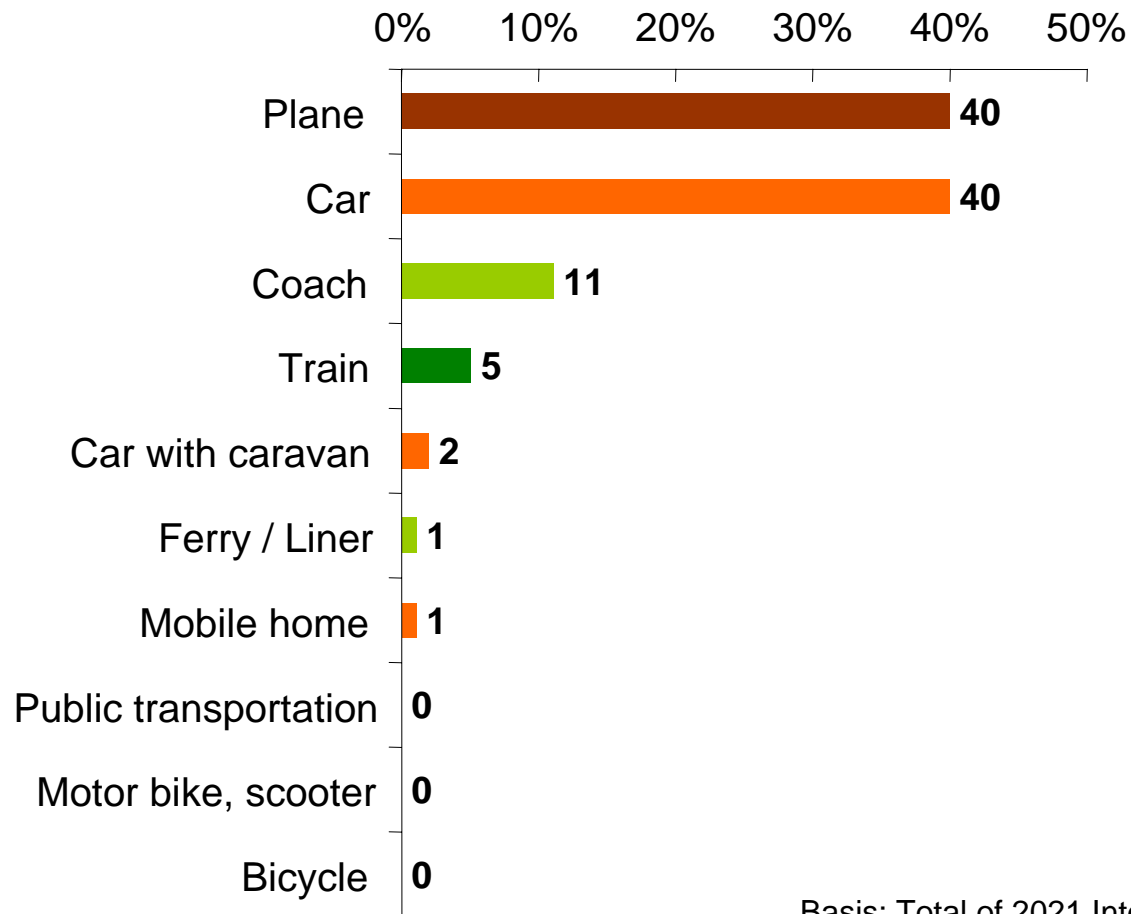
1. Qualitative Phase

- 4 creative group discussions
- 60 explorative Interviews

2. Quantitative Phase

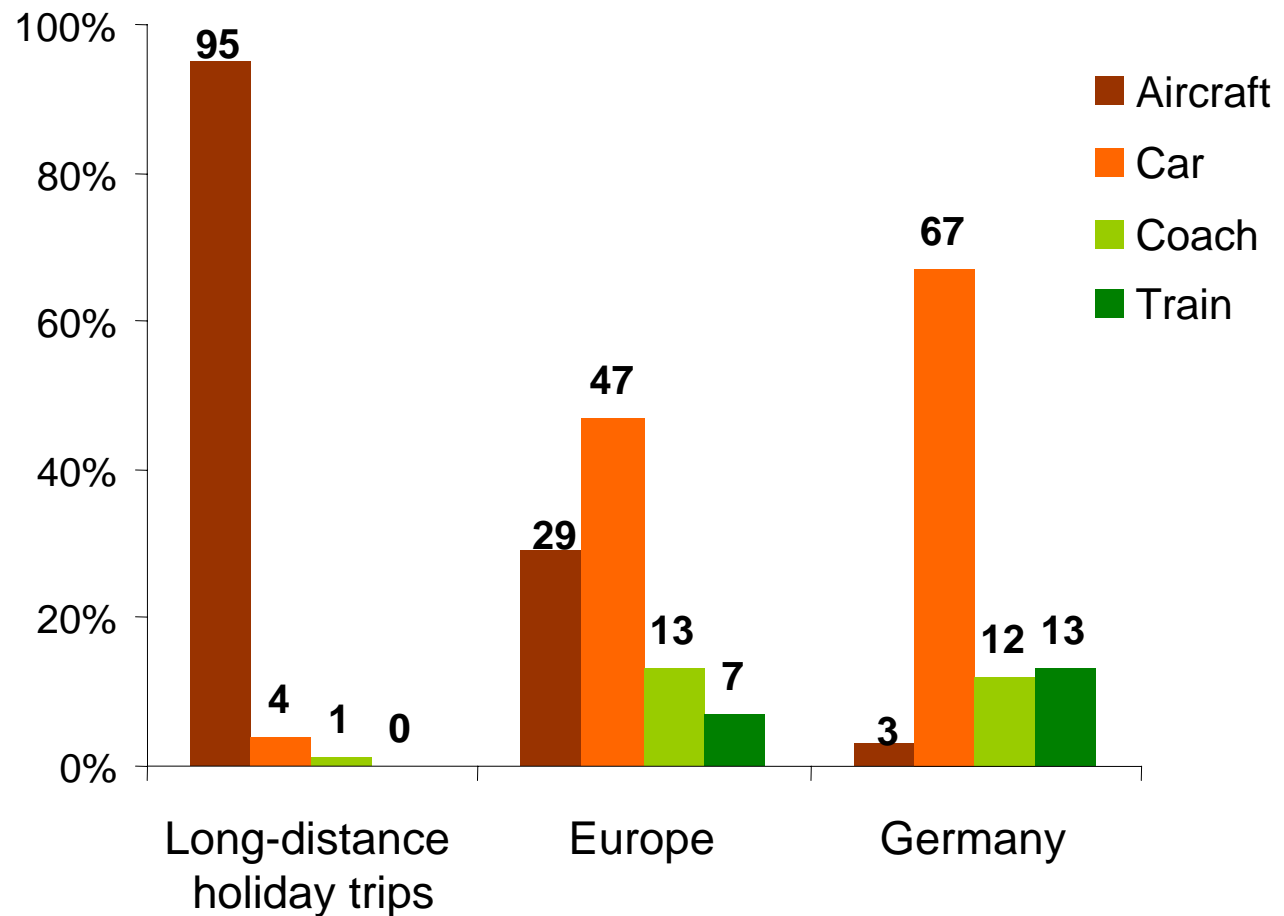
- Field phase: 22nd November – 19th December 2003
- Face-to-face interviews
- Sample size: **2021**

CHOICE OF TRANSPORTATION TRAVEL DESTINATIONS 2002 and 2003



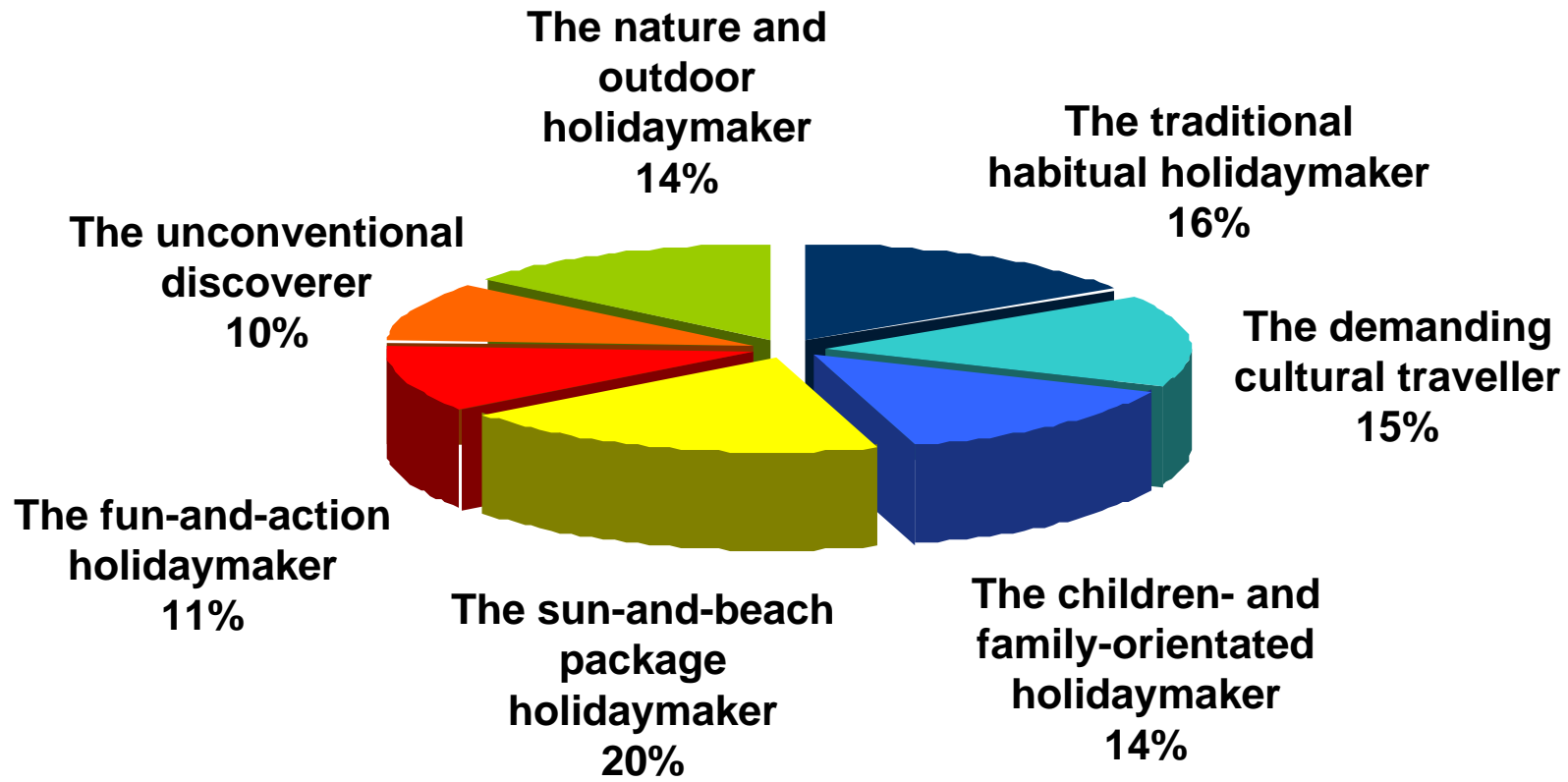
Basis: Total of 2021 Interviews

TRANSPORTATION BY DESTINATIONS DESTINATIONS 2002 AND 2003



Basis: Total of 2021 Interviews

HOLIDAY AND TRAVEL TYPOLOGY



THE TRADITIONAL HABITUAL HOLIDAYMAKERS 16 %

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TRADITIONAL HABITUAL HOLIDAYMAKERS SOCIODEMOGRAPHY AND LIFESTYLE

- Above-average number of **women**
- Mostly **older people**: The majority are older than 60
- Modest school qualifications are over-represented
- Many **pensioners**
- Low level of income by comparison

➔ **Basic orientation: simplicity and security**

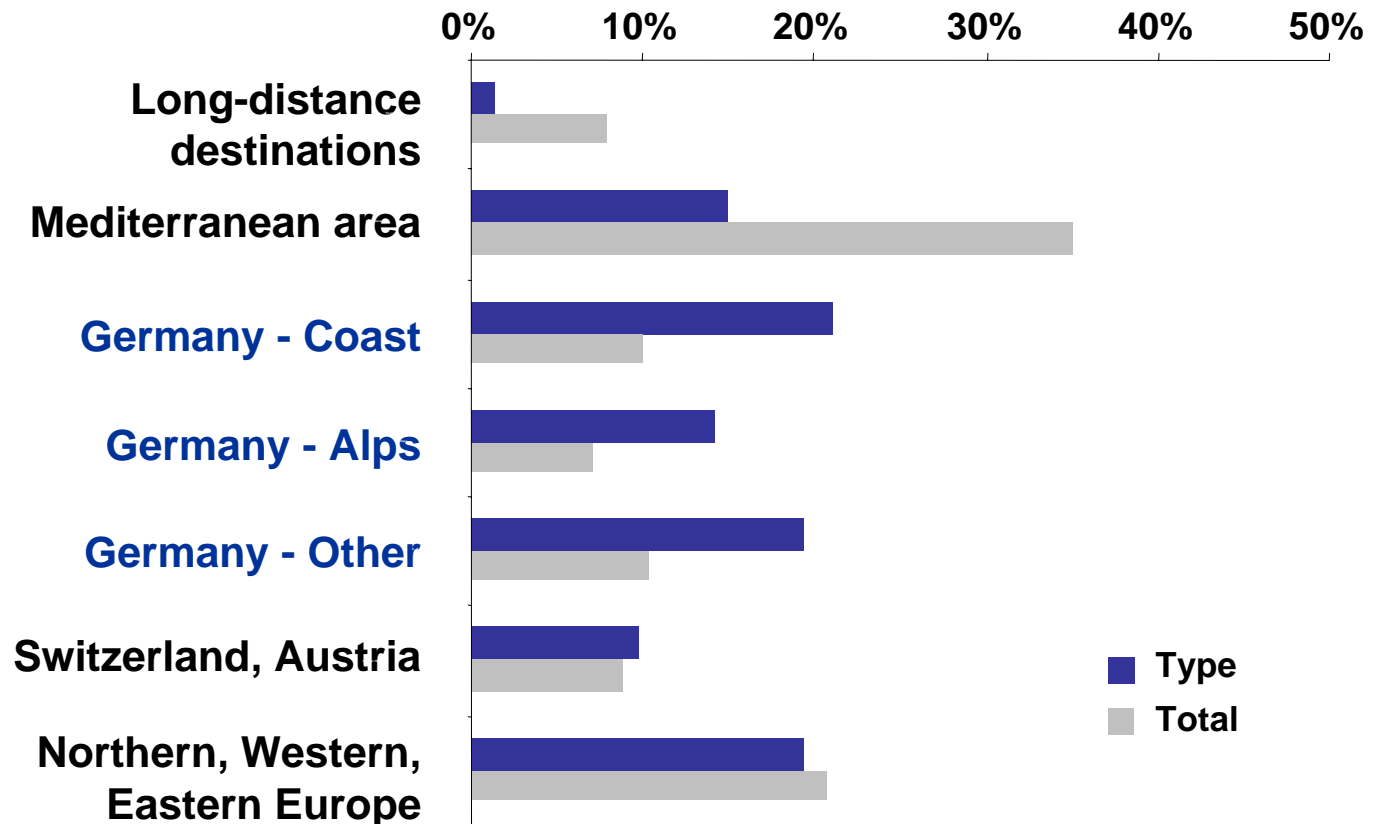
TRADITIONAL HABITUAL HOLIDAYMAKERS

TRAVEL ORIENTATION AND TYPES OF HOLIDAY

- Familiar and accustomed destinations, preferably at the same place
- Security of holiday destination and cleanliness of accommodation are of greatest importance
- Liking for holidays in German-speaking countries
- Insecurity with respect to foreign countries and cultures

➔ **Preferred types of holiday: pleasure trips and holidays in the countryside**

TRADITIONAL HABITUAL HOLIDAYMAKERS TRAVEL DESTINATIONS 2002 AND 2003

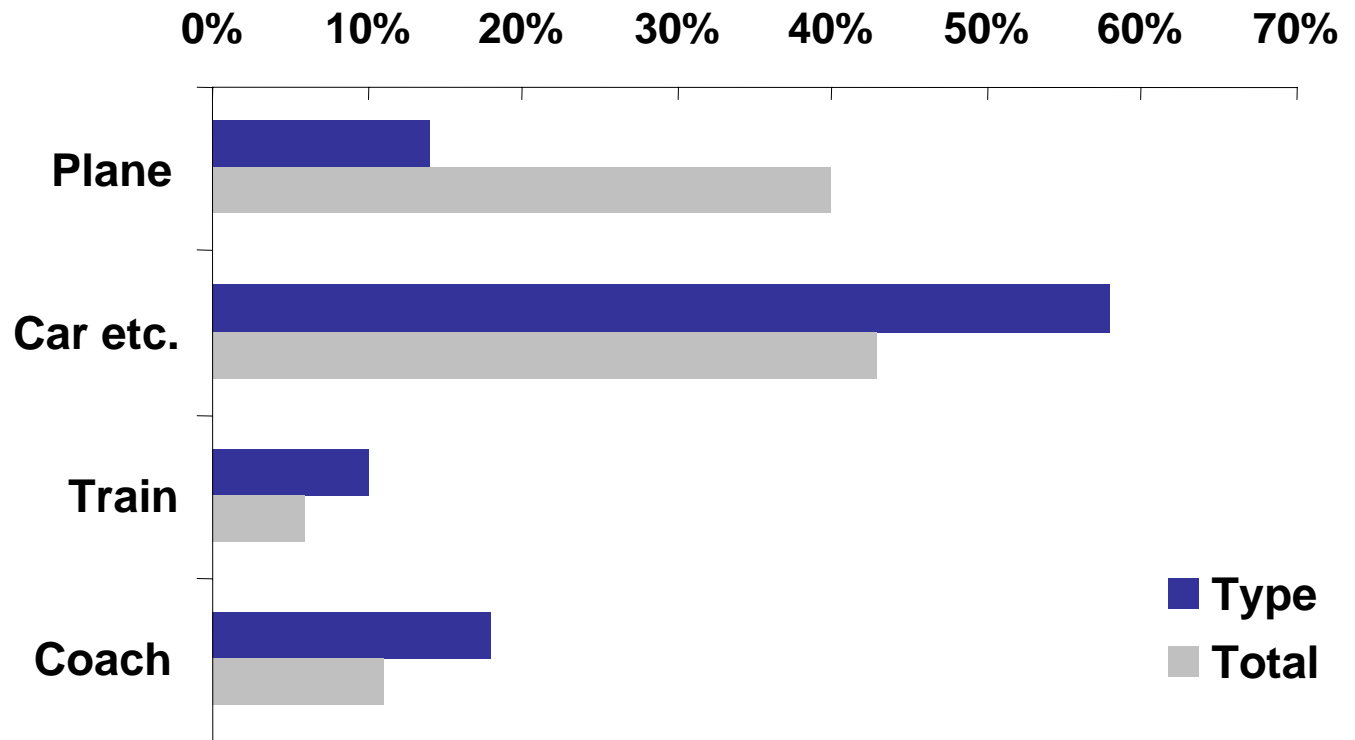


TRADITIONAL HABITUAL HOLIDAYMAKERS TRAVEL BEHAVIOUR

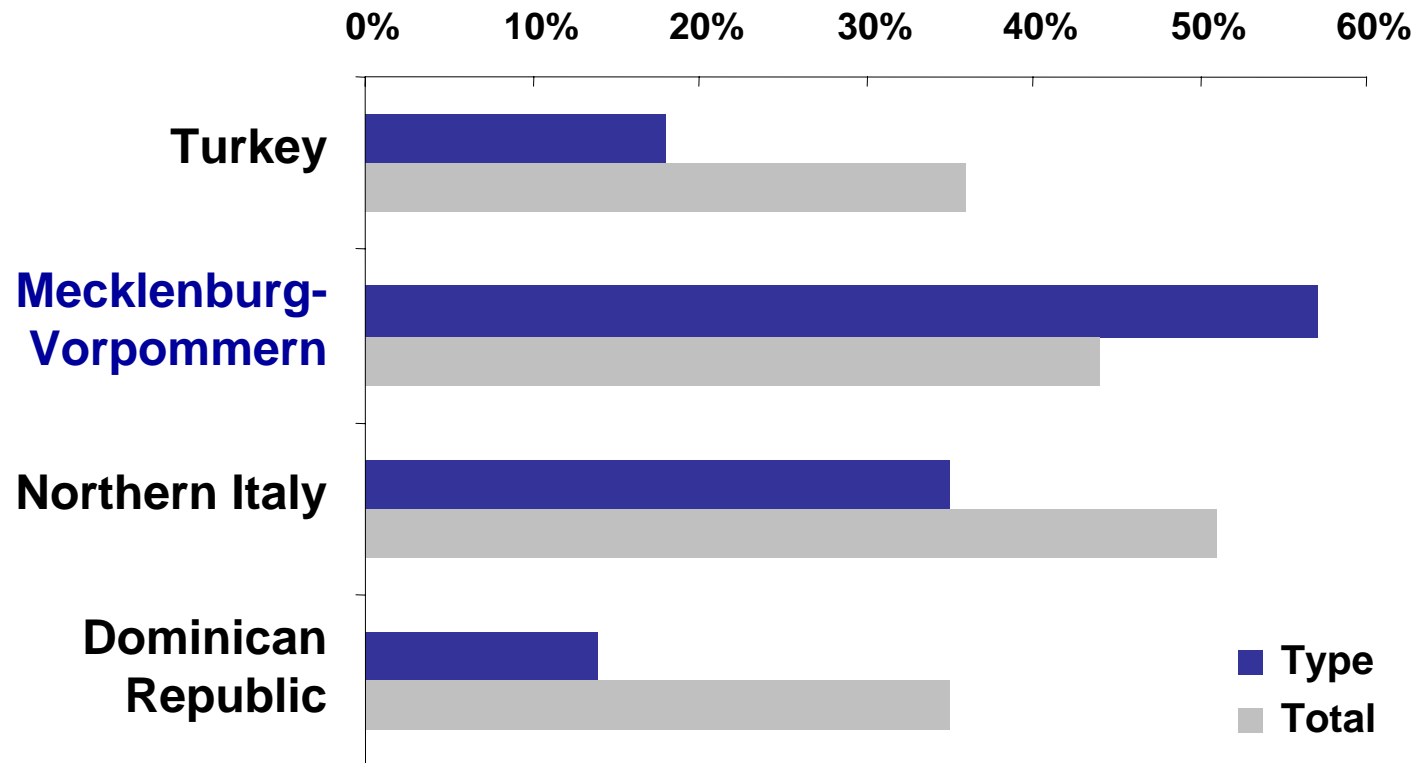
- By comparison, the lowest travel intensity and below-average travel expenditure
- The majority book only accommodation in advance
- The car is primarily used for the journey, but also coach or train
- Concerning accommodation, pensions and rented holiday apartments are over-represented

➔ Traditional target group for holidays in Germany

TRADITIONAL HABITUAL HOLIDAYMAKERS TRANSPORTATION FOR THE JOURNEY



TRADITIONAL HABITUAL HOLIDAYMAKERS ATTRACTIVENESS OF SELECTED DESTINATIONS



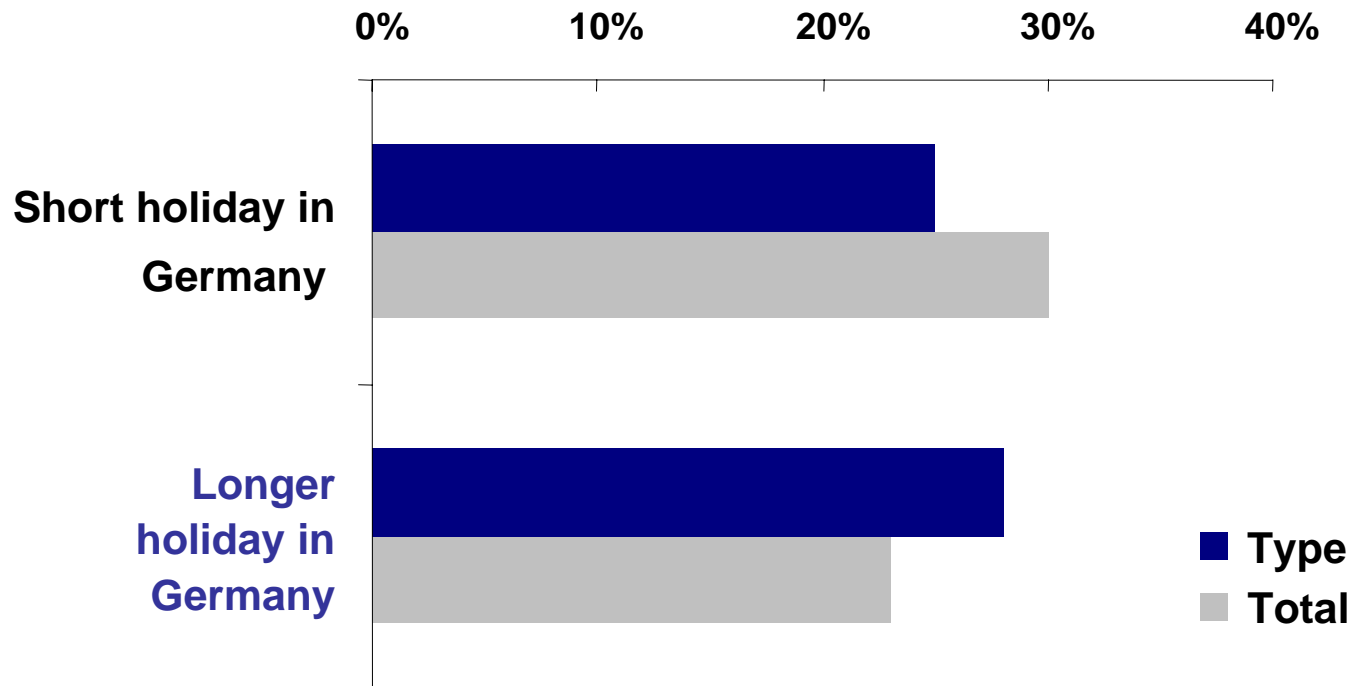
■ Type
■ Total

N = 1740

Answer: „very attractive / rather attraktiv“

TRADITIONAL HABITUAL HOLIDAYMAKERS ATTRACTIVENESS OF HOLIDAYS IN GERMANY

Likelihood of a holiday in Germany within the following three years



■ Type
■ Total

Answer: „Very likely“

THE DEMANDING CULTURAL TRAVELLERS 15 %

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DEMANDING 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
 - Predominantly **middle and high income**
- ➔ **Strongly developed cultural interests**
- ➔ **Sensitive to ecological and social issues**

DEMANDING CULTURAL TRAVELLERS

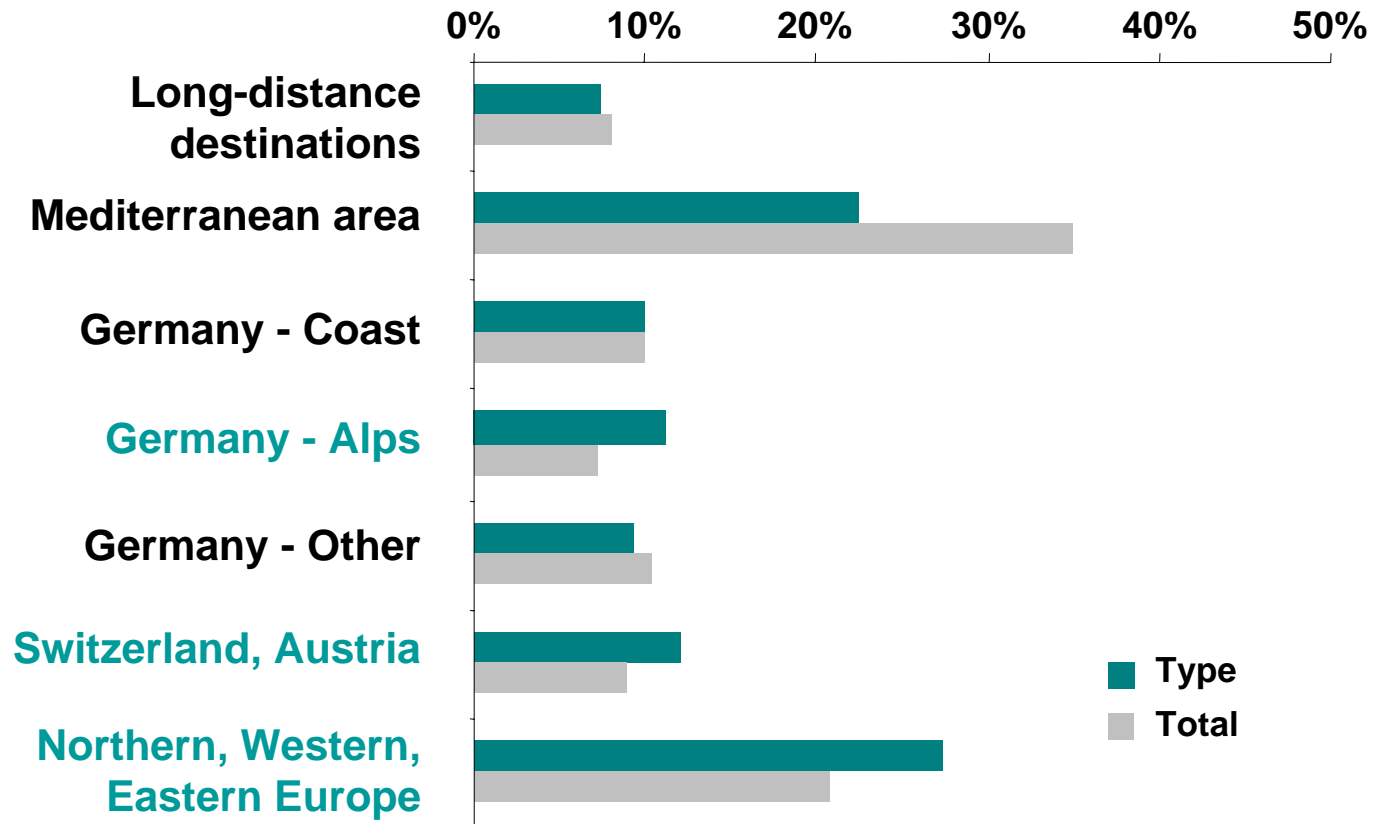
TRAVEL ORIENTATION AND TYPES OF HOLIDAY

- Interest in and respect for other cultures, adaptation to the culture of the country visited with regard to language, food, behaviour etc.
- Desire for enlightenment and comprehensive preparation for the holiday region
- Interest in the ecological and social sustainability of holiday travel
- At the same time, appreciation of service and comfort

➔ **Predominantly preferred types of holiday:**
holidays in the countryside / in the mountains, cultural trips, individual tours

DEMANDING CULTURAL TRAVELLERS

TRAVEL DESTINATIONS 2002 AND 2003



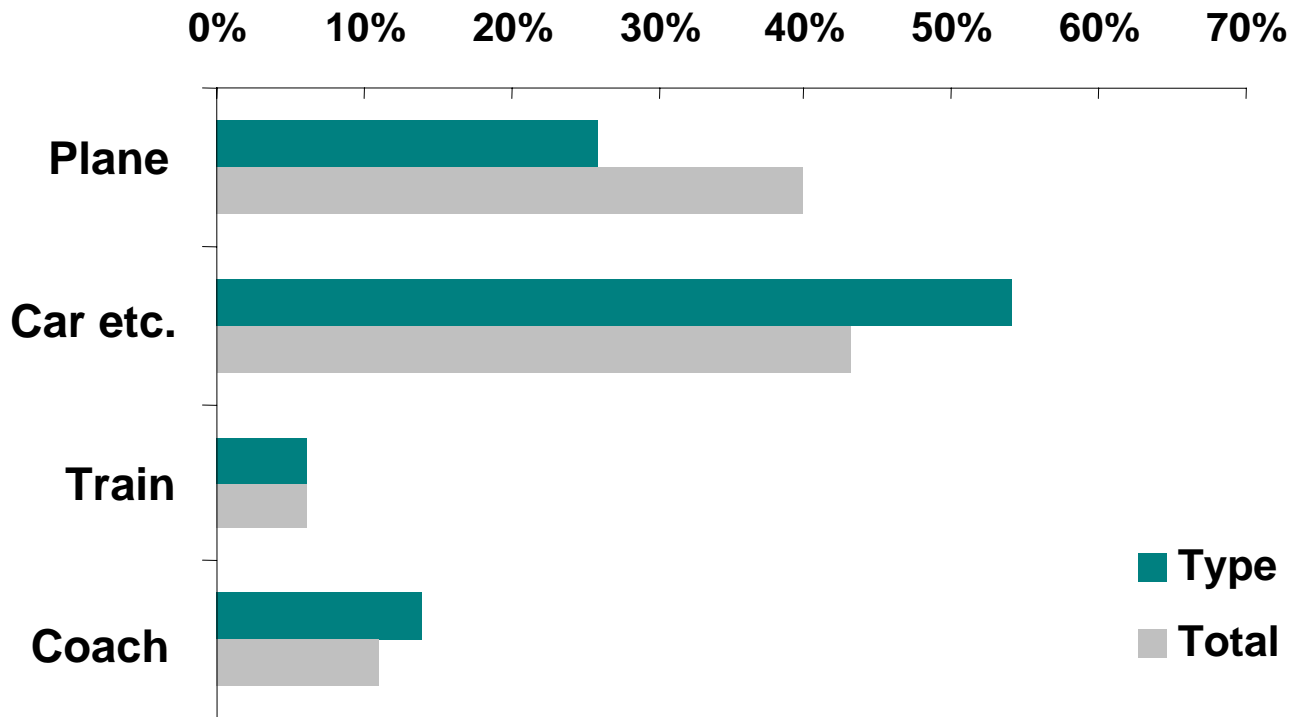
DEMANDING CULTURAL TRAVELLERS TRAVEL BEHAVIOUR

- By comparison, the least inclination towards package tours
- Generally only accommodation is booked
- Guesthouses / pensions and owner-occupied holiday apartments are slightly over-represented
- The journey is frequently made by car, which is also the most important means of transportation at the holiday destination

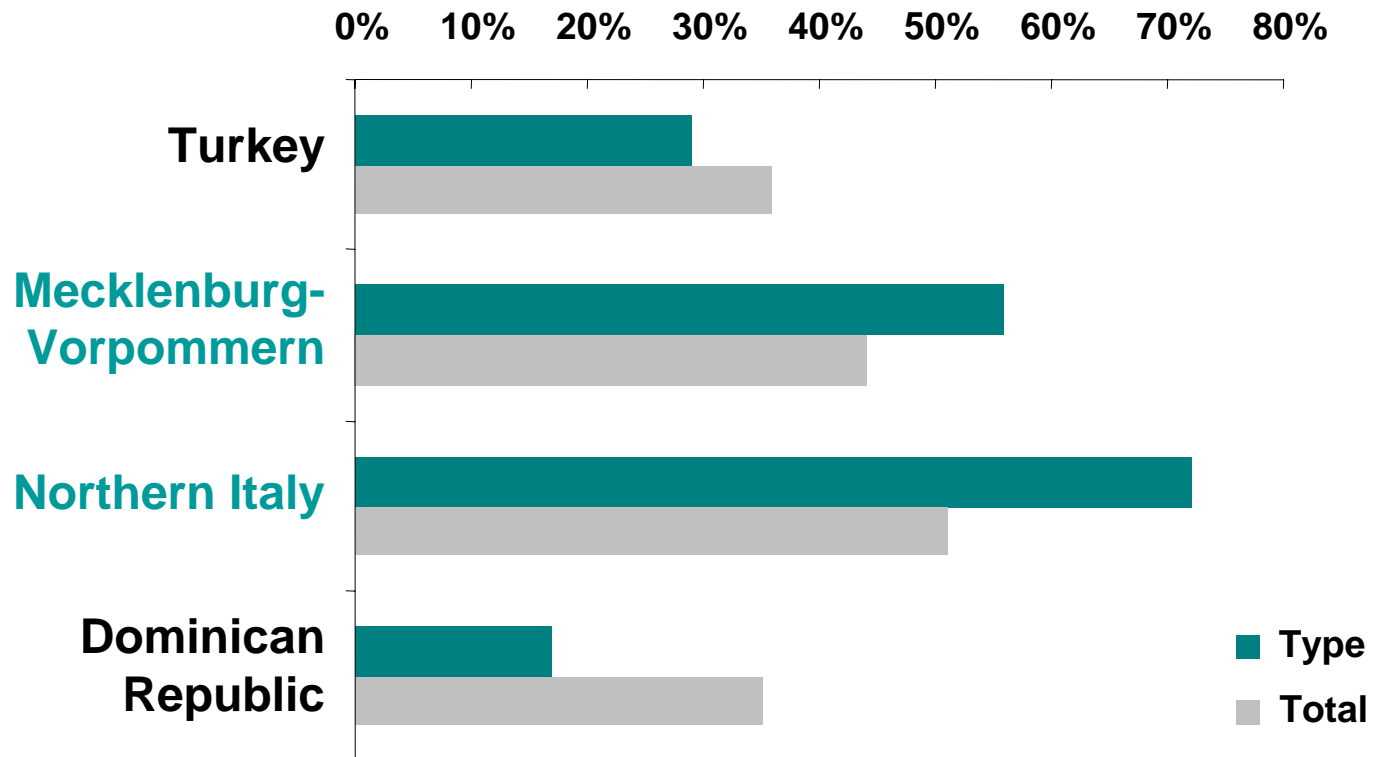
➔ **Barriers to classic package deals**

DEMANDING CULTURAL TRAVELLERS

TRANSPORTATION FOR THE JOURNEY



DEMANDING CULTURAL TRAVELLERS ATTRACTIVENESS OF SELECTED DESTINATIONS



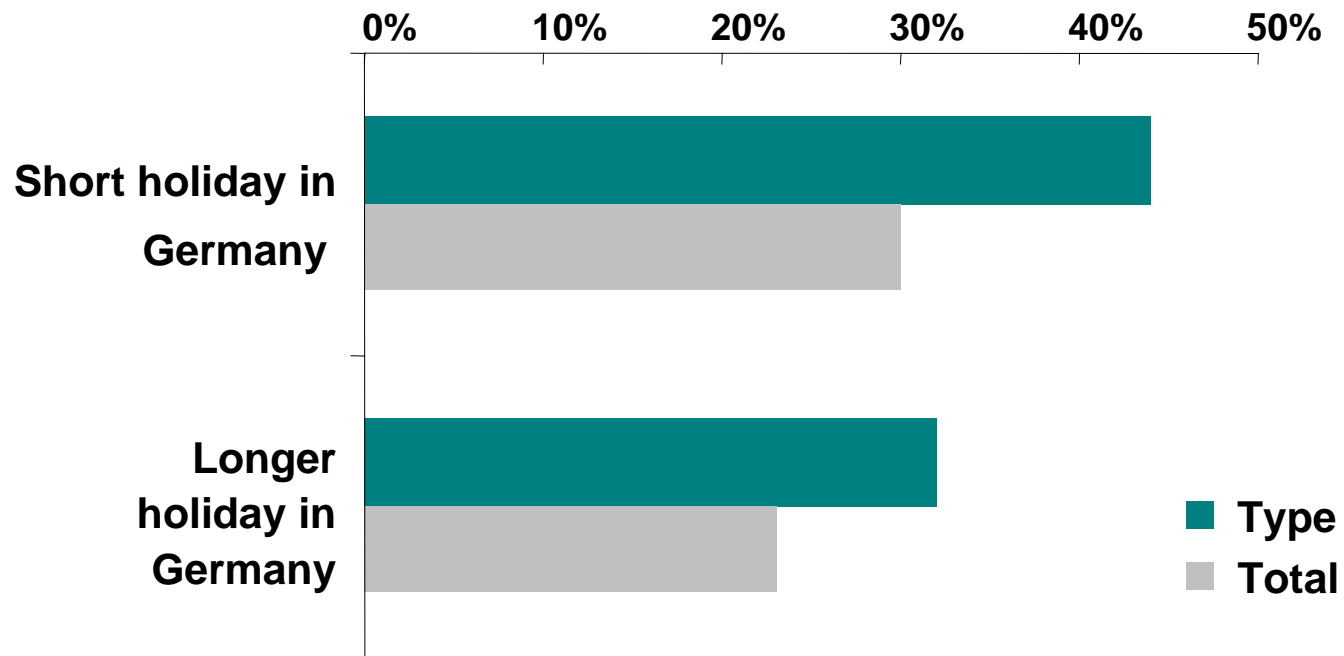
■ Type
■ Total

N = 1740

Answer: „very attractive / rather attraktiv“

DEMANDING CULTURAL TRAVELLERS ATTRACTIVENESS OF HOLIDAYS IN GERMANY

Likelihood of a holiday in Germany within the following three years



■ Type
■ Total

Answer: „Very likely“

THE CHILDREN- AND FAMILY- ORIENTATED HOLIDAYMAKERS 14 %

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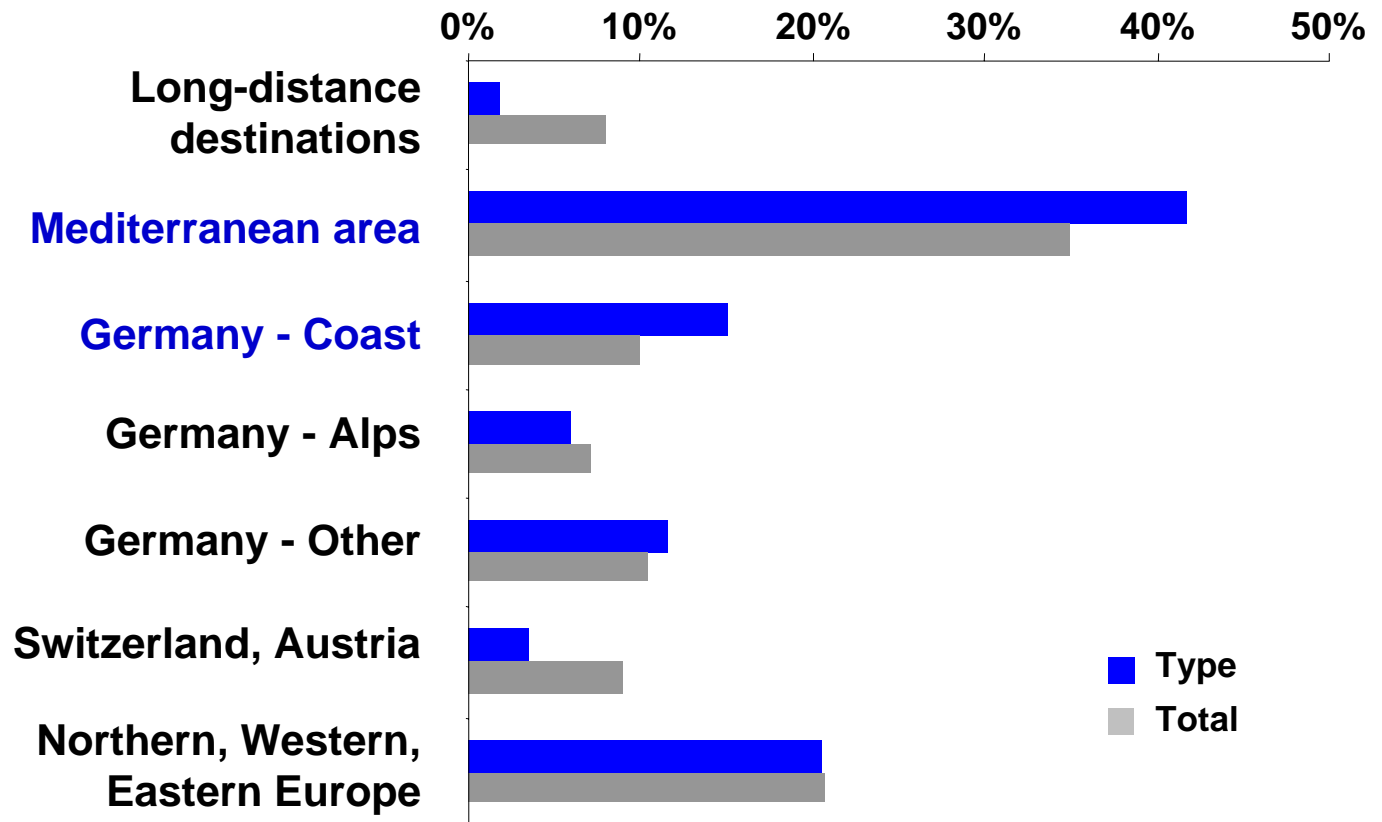
CHILDREN- AND FAMILY-ORIENTATED SOCIODEMOGRAPHY AND LIFESTYLE

- Around one-third are **women**
 - Age-focus: 30-49
 - The part-time employed and housewives are over-represented
 - **Middle to high household incomes**
- ➔ **Great importance of family values**
- ➔ **Frequent stress and excessive demands**

CHILDREN- AND FAMILY-ORIENTATED TRAVEL ORIENTATION AND TYPES OF HOLIDAY

- Suitability for families and children the most important factor in the choice of holiday destination
 - Desire for relief, release from responsibilities, “lazing around”
 - ... also through special programmes for children
 - Love of summer, sun and beach
- ➔ **Clear holiday favourites: beach holidays and pleasure trips**

CHILDREN- AND FAMILY-ORIENTATED TRAVEL DESTINATIONS 2002 AND 2003

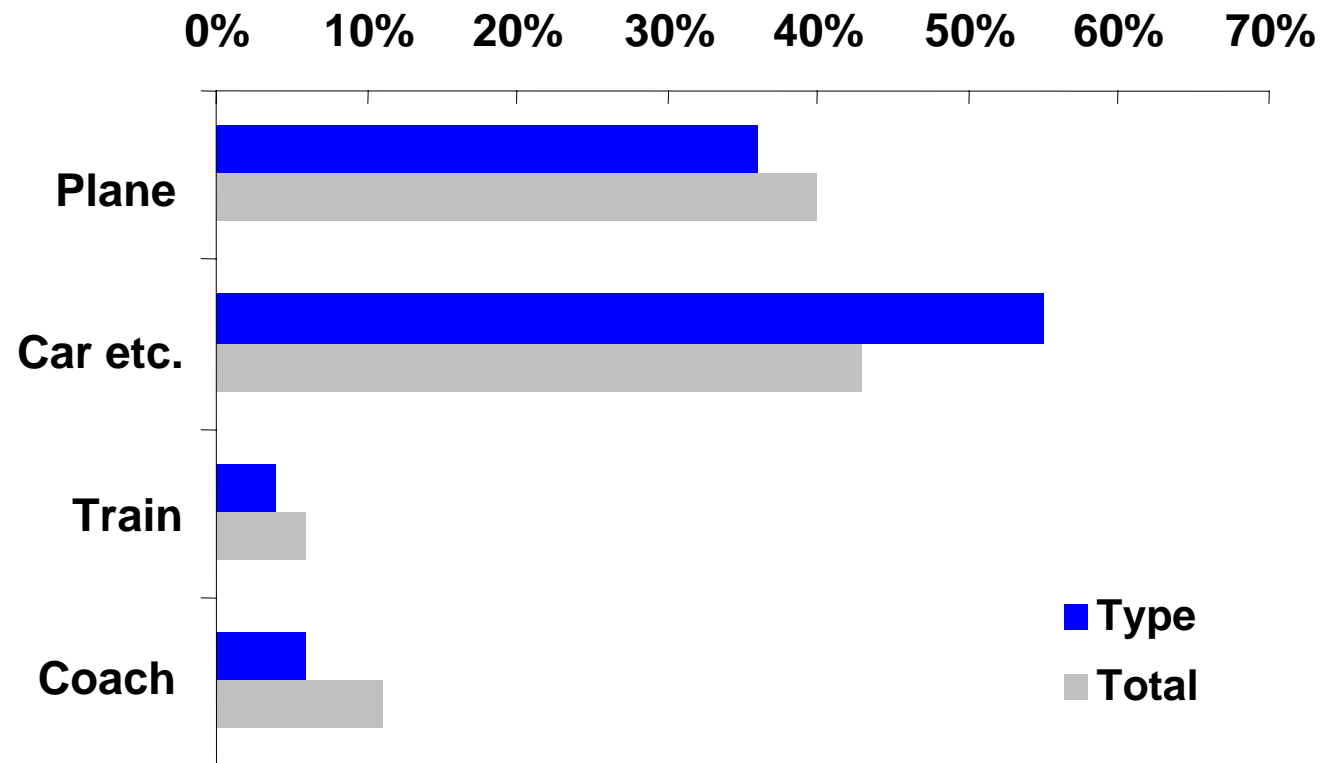


CHILDREN- AND FAMILY-ORIENTATED TRAVEL BEHAVIOUR

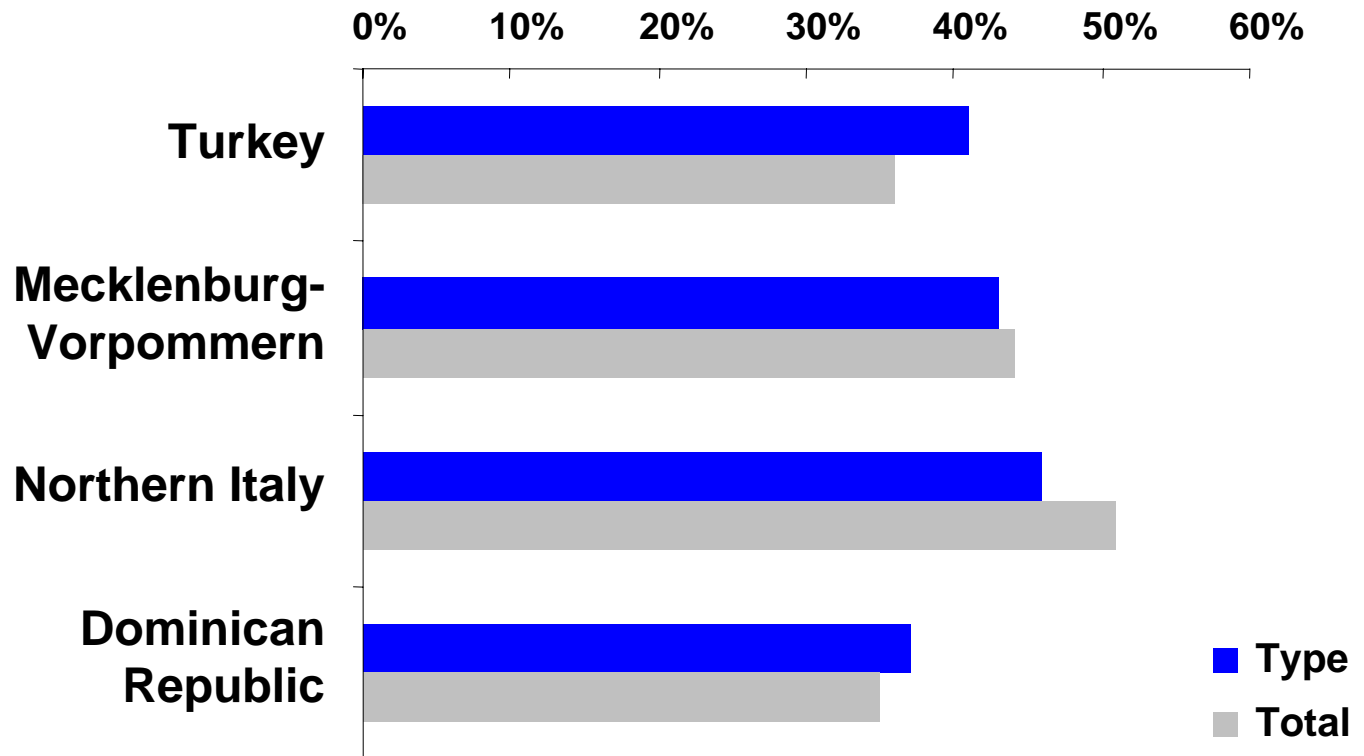
- Generally only accommodation is booked in advance
- Rented holiday apartments as well as apartment complexes and caravans / mobile homes are over-represented
- The journey is made mostly by car
- The car is also the most important means of transportation at the holiday destination

➔ **Key demand of this target group:
rest and relaxation as well as experiences with the
family**

CHILDREN- AND FAMILY-ORIENTATED TRANSPORTATION FOR THE JOURNEY



CHILDREN- AND FAMILY-ORIENTATED ATTRACTIVENESS OF SELECTED DESTINATIONS



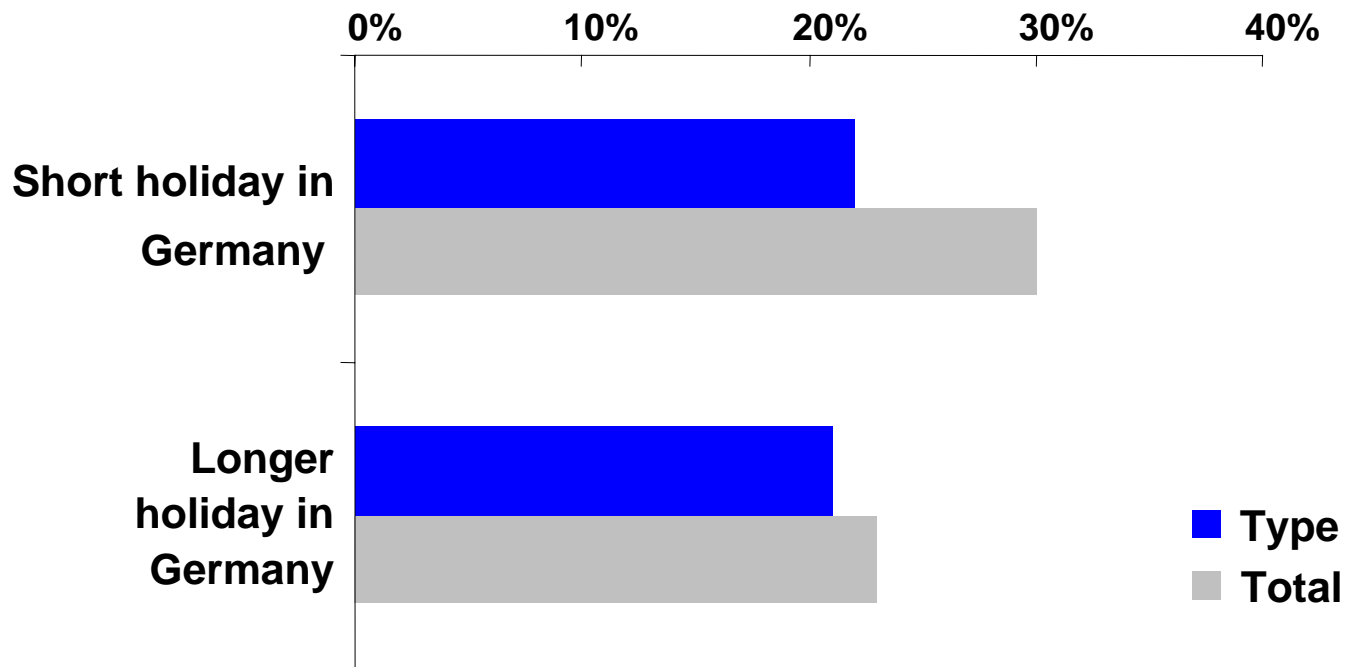
■ Type
■ Total

N = 1740

Answer: „very attractive / rather attraktiv“

CHILDREN- AND FAMILY-ORIENTATED ATTRACTIVENESS OF HOLIDAYS IN GERMANY

Likelihood of a holiday in Germany within the following three years



■ Type
■ Total

Answer: „Very likely“

THE SUN-AND-BEACH PACKAGE HOLIDAYMAKERS 20 %

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SUN-AND-BEACH PACKAGE HOLIDAYMAKERS SOCIODEMOGRAPHY AND LIFESTYLE

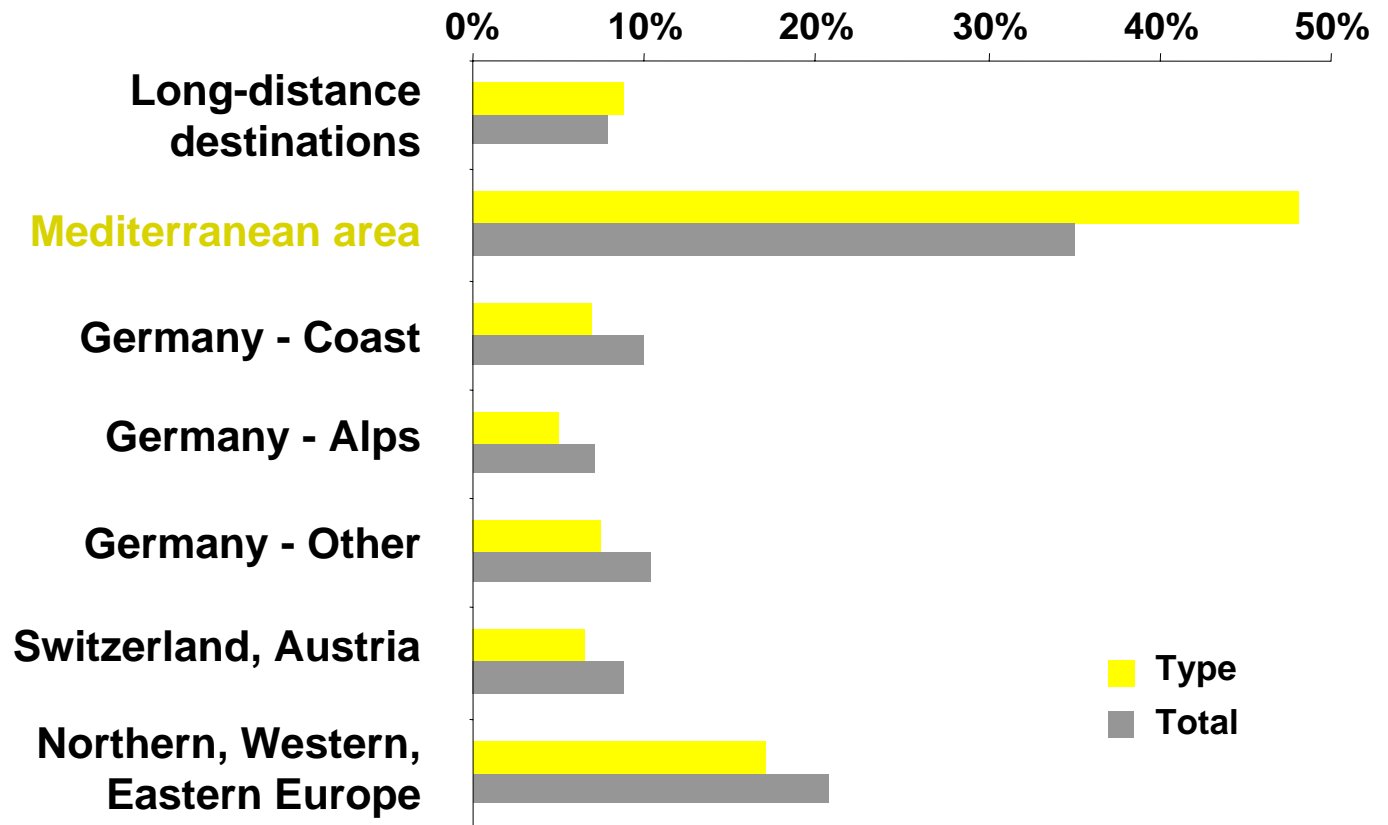
- People **over 40** are over-represented
 - Many are married, but there is a large share of singles and divorcees
 - Focus is on modest and middle education
 - A below-average income is likely
- ➔ **Outfit and appearance play an important role**
- ➔ **Desire for something special within a conventional setting**

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

- Key demands: summer, sun, beach
- Pursuit of relaxation: one wants to have nothing to do, and to be spoilt
- Appreciation of good service and comfort
- Desire for thoroughly-organized and dependable holiday offers
- Value for money is the key factor (bargain-hunter mentality)

➔ **Unequivocal preferences: beach holidays and pleasure trips**

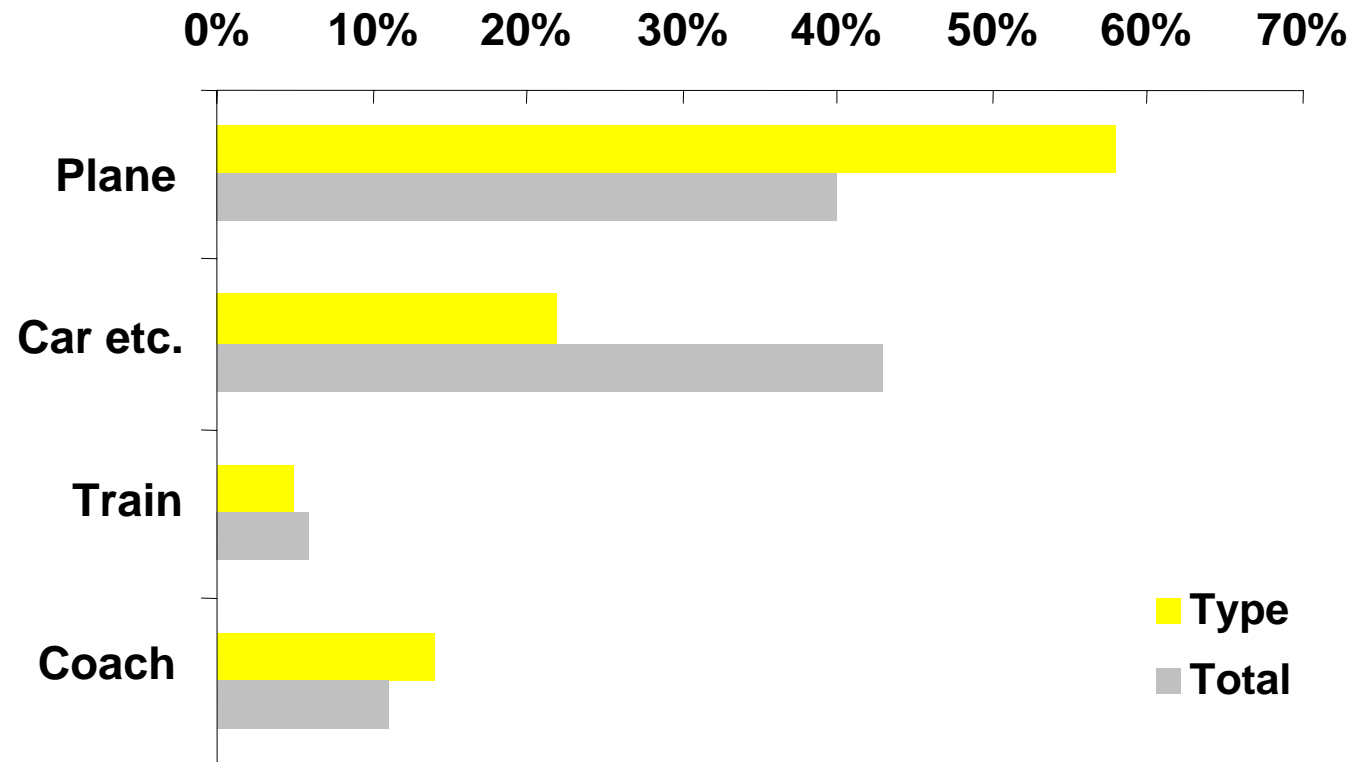
SUN-AND-BEACH PACKAGE HOLIDAYMAKERS TRAVEL DESTINATIONS 2002 AND 2003



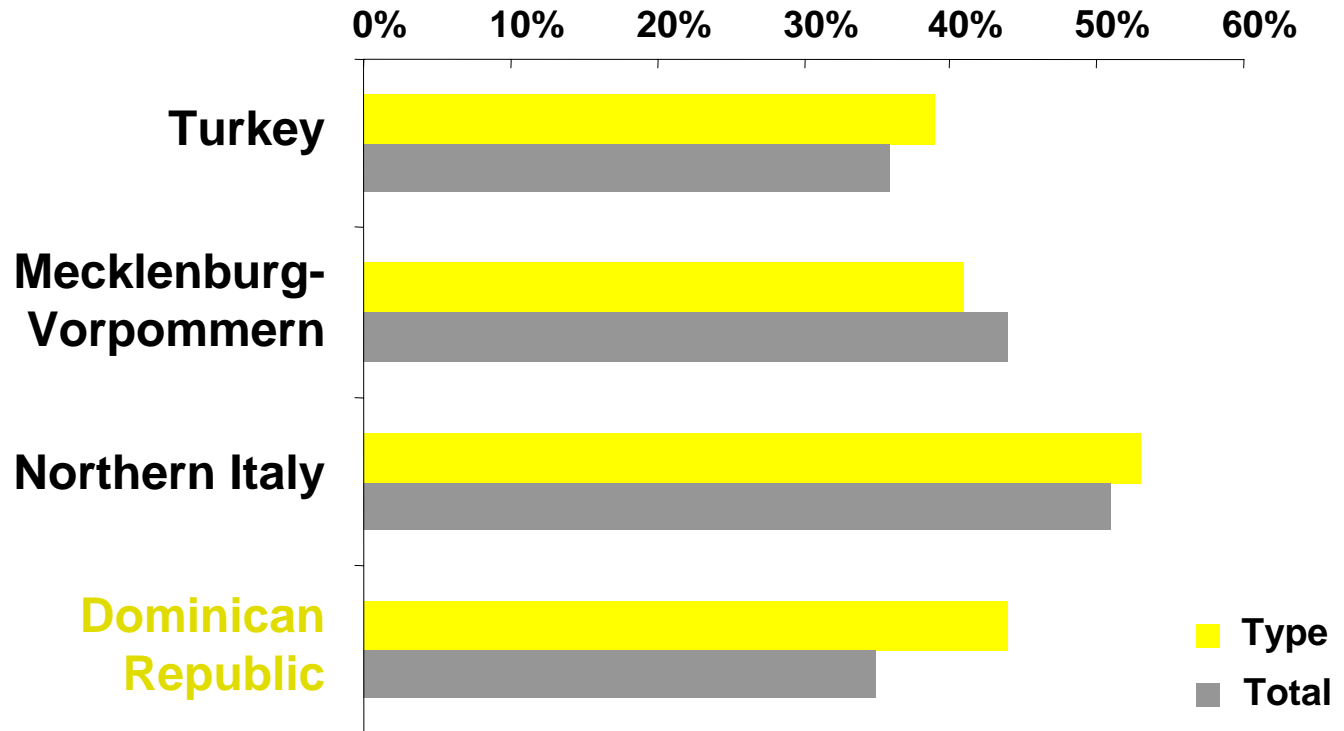
SUN-AND-BEACH PACKAGE HOLIDAYMAKERS TRAVEL BEHAVIOUR

- Package tours are predominantly booked, frequently with the same travel agent
 - The journey: mainly by plane, but also above-average use of coaches
 - For accommodation, a hotel or hotel complex is predominantly chosen
- ➔ **Trend towards all-inclusive offers, since these are particularly suitable for price-comparisons and travel expenditure is thus calculable**

SUN-AND-BEACH PACKAGE HOLIDAYMAKERS TRANSPORTATION FOR THE JOURNEY



SUN-AND-BEACH PACKAGE HOLIDAYMAKERS ATTRACTIVENESS OF SELECTED DESTINATIONS



THE YOUNG FUN & ACTION HOLIDAYMAKERS 11 %

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YOUNG FUN & ACTION HOLIDAYMAKERS SOCIODEMOGRAPHY AND LIFESTYLE

- **Young people of all types**
 - Around one-third are **men**
 - The majority are single and live alone
 - Focus: average education
 - Below-average income
- ➔ **Egocentric and hedonistic:
experience something new, have fun, have a change**

YOUNG FUN & ACTION HOLIDAYMAKERS

TRAVEL ORIENTATION AND TYPES OF HOLIDAY

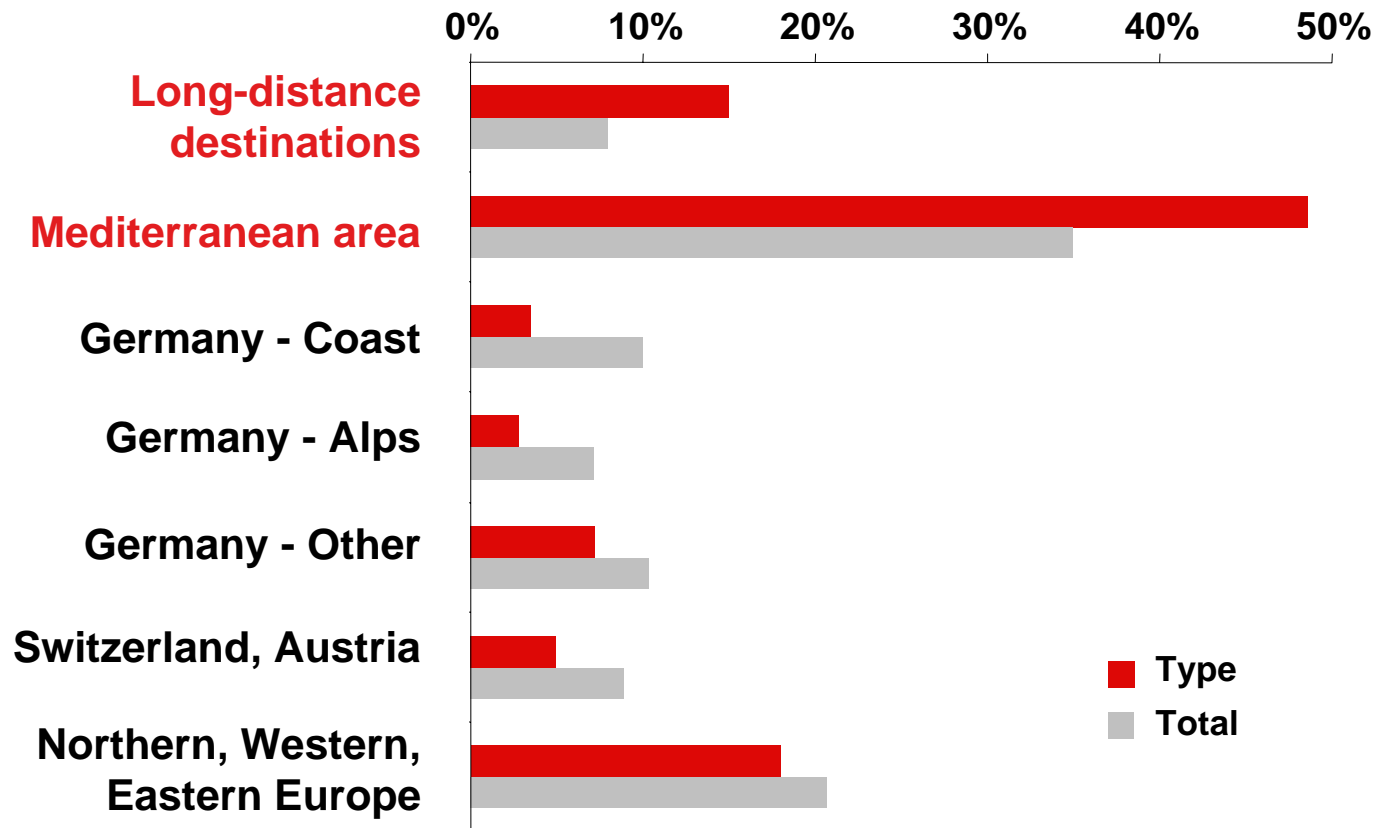
- Action, sport und variety
- Beach-life and sport during the day, parties at night
- Holiday as the chance to meet people
- The holiday decision is often spontaneous
- Distinct orientation towards price and special offers

➔ Clearly preferred holiday:

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

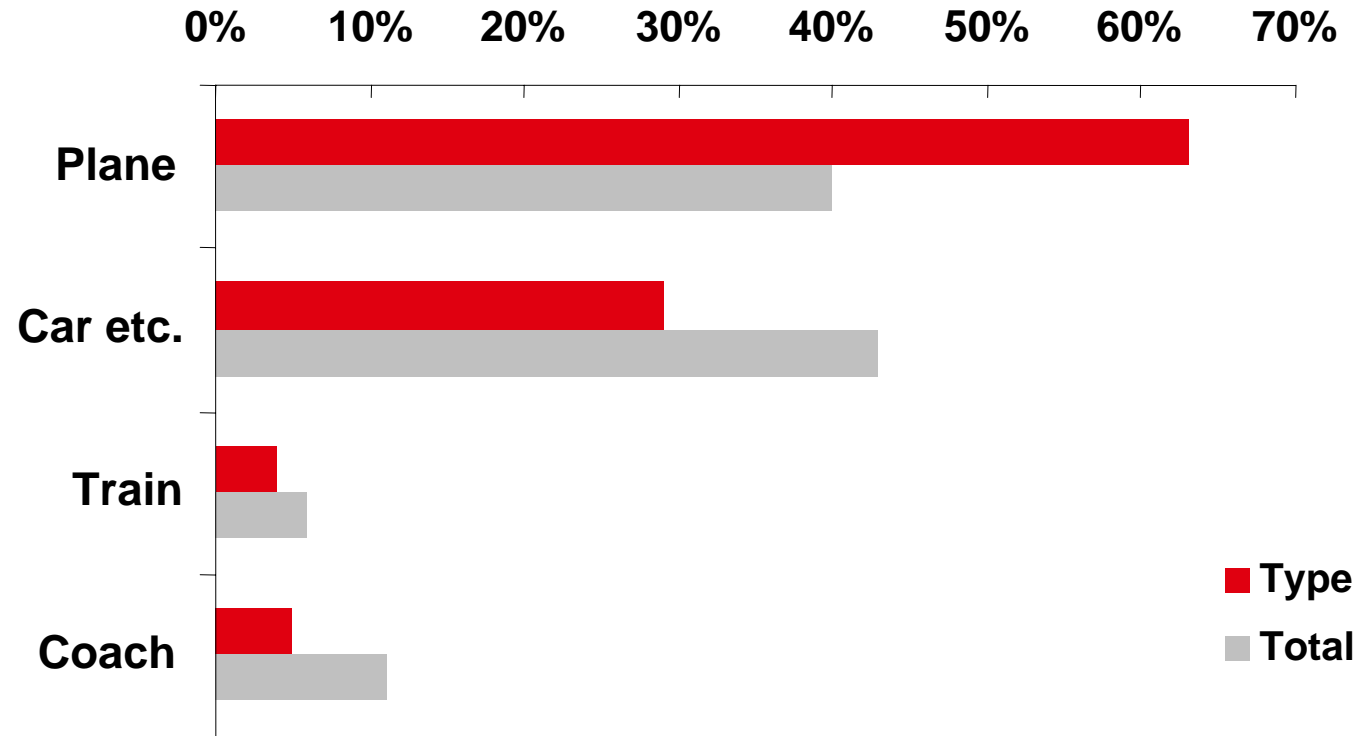


YOUNG FUN & ACTION HOLIDAYMAKERS TRAVEL BEHAVIOUR

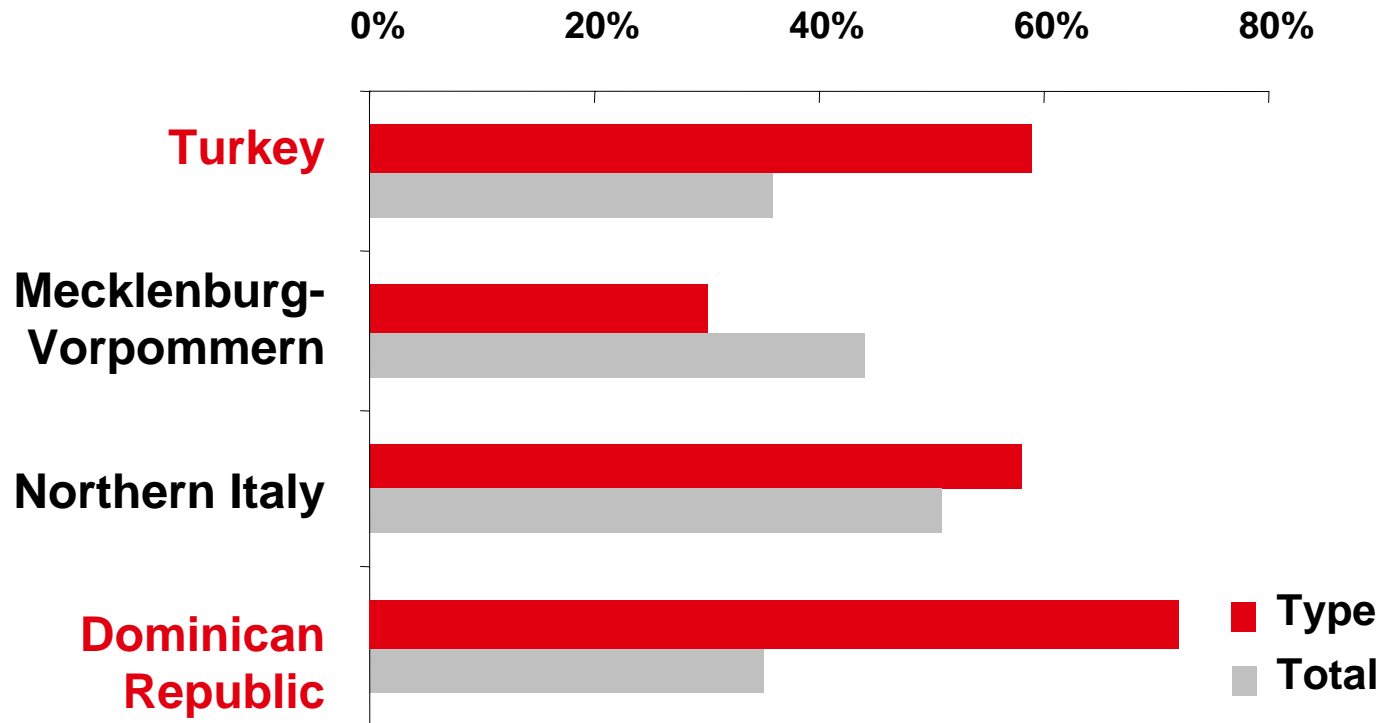
- One-quarter go on holiday alone
- Preference is to book a complete holiday
- ... and this mostly at short notice
- Journey: above all by plane
- Accommodation: primarily in hotels / hotel complexes, clubs are over-represented

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

YOUNG FUN & ACTION HOLIDAYMAKERS TRANSPORTATION FOR THE JOURNEY



YOUNG FUN & ACTION HOLIDAYMAKERS ATTRACTIVENESS OF SELECTED DESTINATIONS

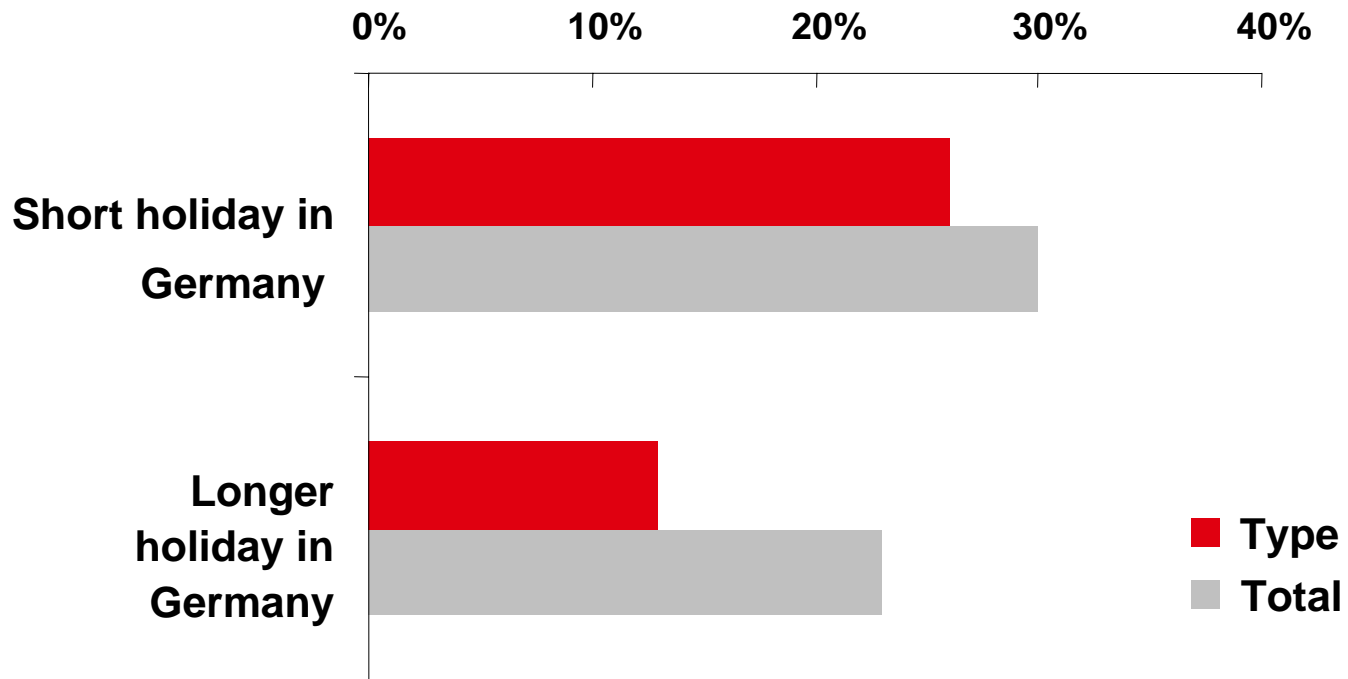


N = 1740

Answer: „very attractive / rather attraktiv“

YOUNG FUN & ACTION HOLIDAYMAKERS ATTRACTIVENESS OF HOLIDAYS IN GERMANY

Likelihood of a holiday in Germany within the following three years



■ Type
■ Total

Answer: „Very likely“

THE UNCONVENTIONAL DISCOVERERS 10 %

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UNCONVENTIONAL DISCOVERERS SOCIODEMOGRAPHY AND LIFESTYLE

- Men are somewhat over-represented
- Middle and younger age-groups
- Predominantly **without children**, half live alone
- **Higher education**
- Large share of employed people, as well as of school-children and students

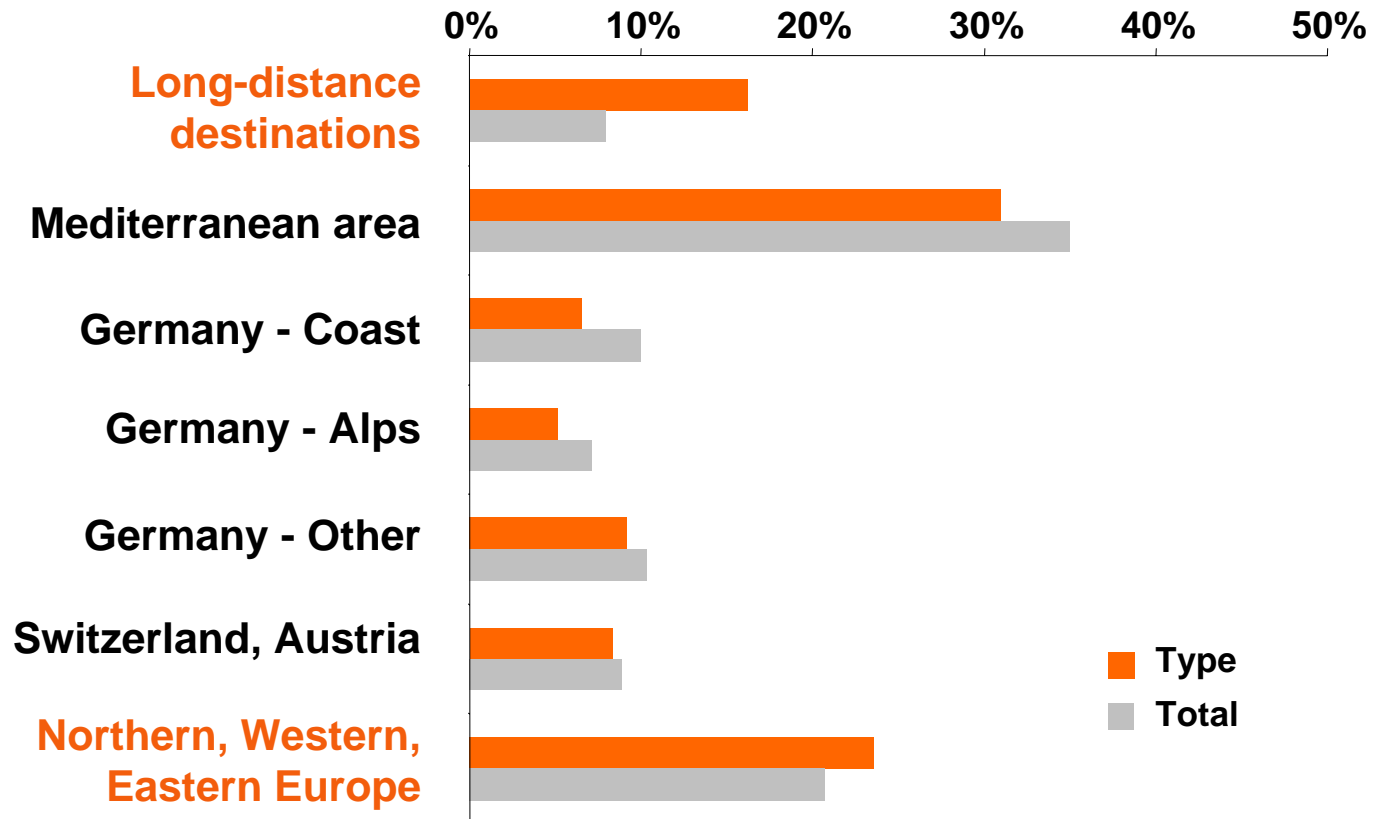
➔ **A liking for trying things out, individualistic and open-minded outlook**

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
- ➔ **Above-average holiday preferences: individual tours, study tours and city trips**

UNCONVENTIONAL DISCOVERERS TRAVEL DESTINATIONS 2002 AND 2003



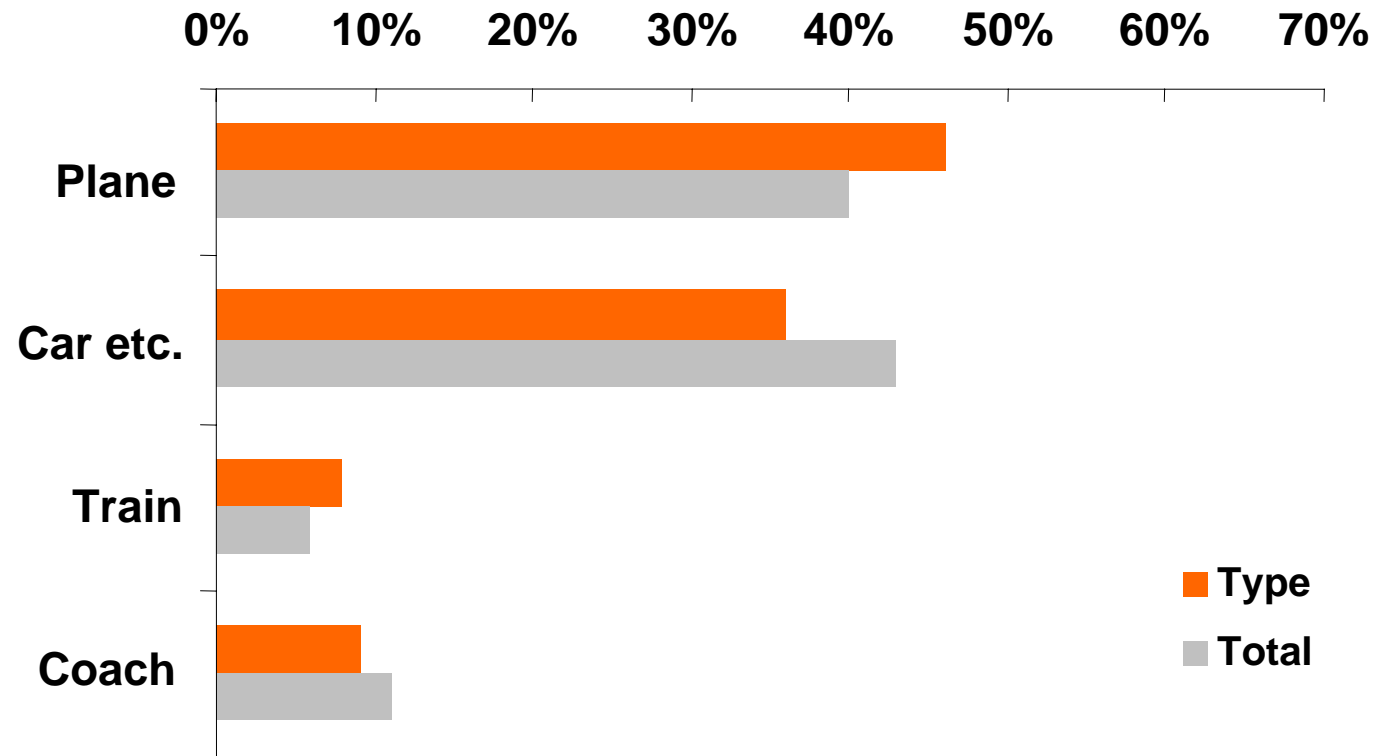
UNCONVENTIONAL DISCOVERERS TRAVEL BEHAVIOUR

- More than one-quarter go on holiday alone
- Penchant for long holiday trips
- Frequently nothing is booked in advance, or just a ticket is purchased.
- For the journey, planes and trains are over-represented
- No preferred type of accommodation

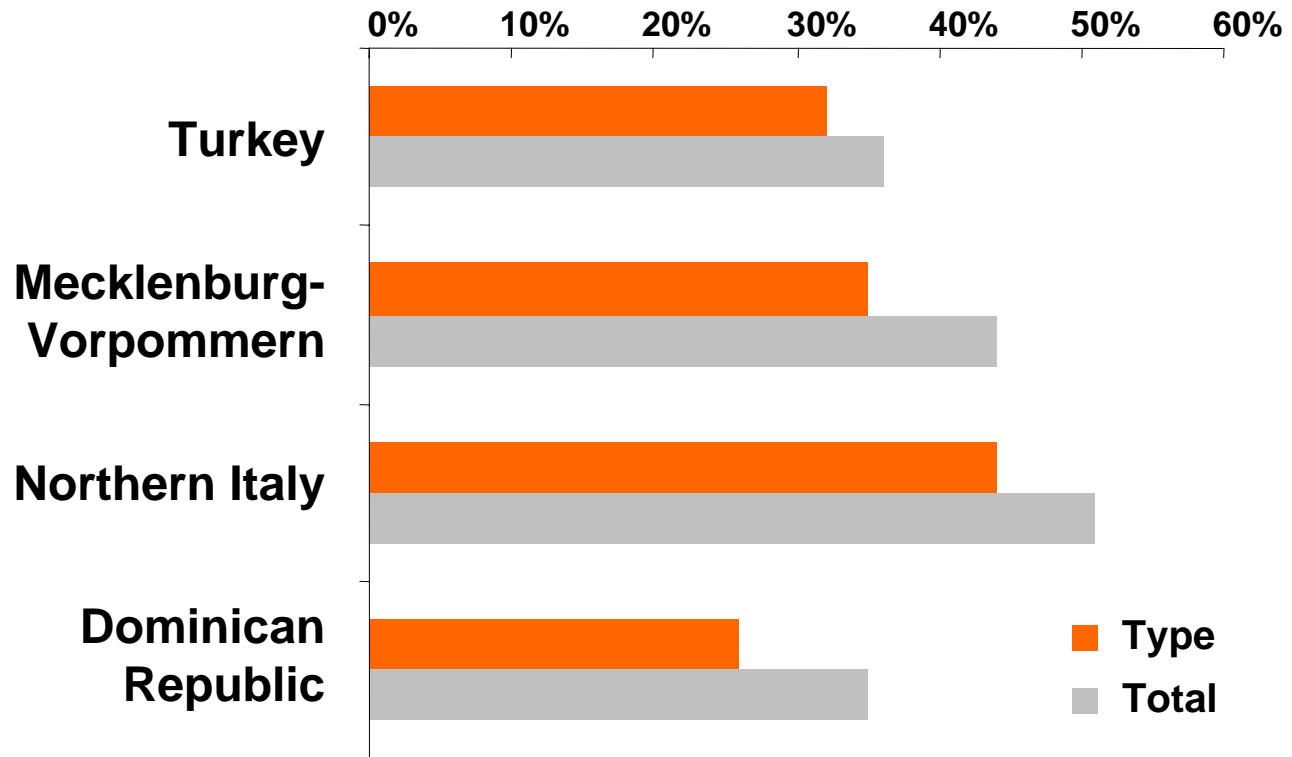
➔ **Negligible inclination towards organized holidays**

➔ **Target group for rail-travel offers**

UNCONVENTIONAL DISCOVERERS TRANSPORTATION FOR THE JOURNEY

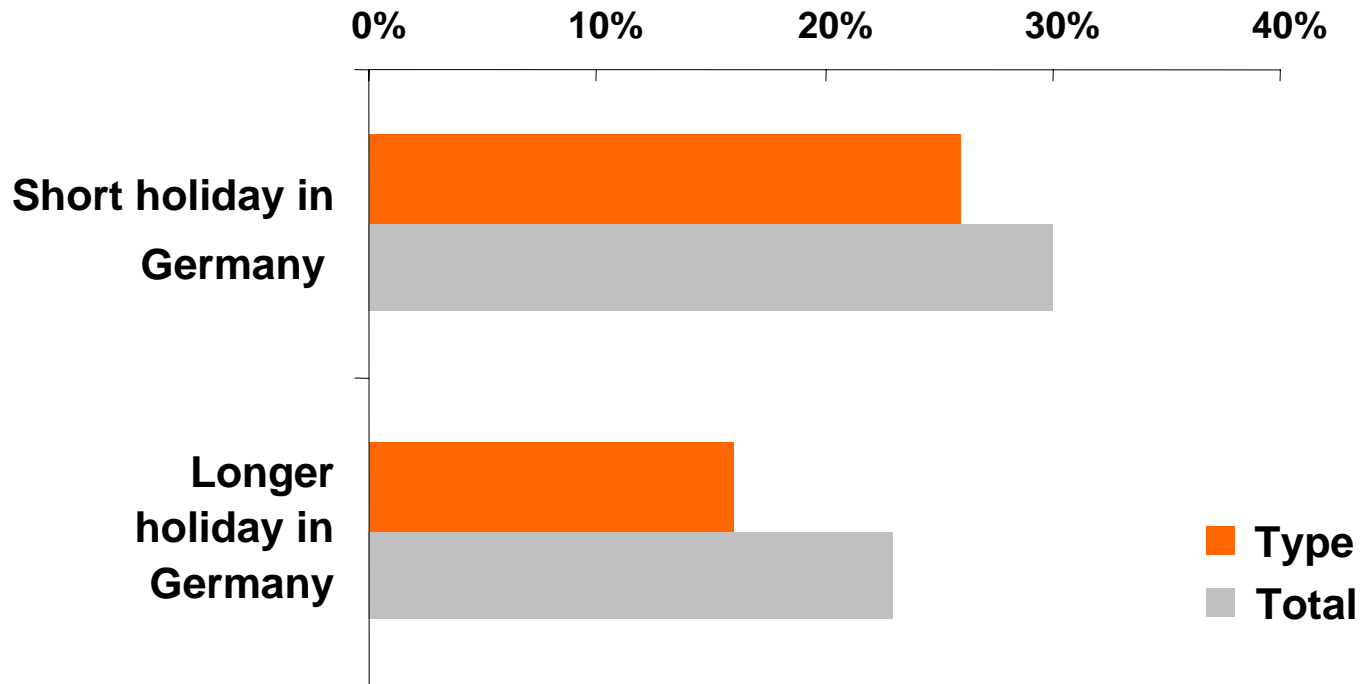


UNCONVENTIONAL DISCOVERERS ATTRACTIVENESS OF SELECTED DESTINATIONS



UNCONVENTIONAL DISCOVERERS ATTRACTIVENESS OF HOLIDAYS IN GERMANY

Likelihood of a holiday in Germany within the following three years



■ Type
■ Total

Answer: „Very likely“

THE NATURE AND OUTDOOR HOLIDAYMAKERS 14 %

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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**

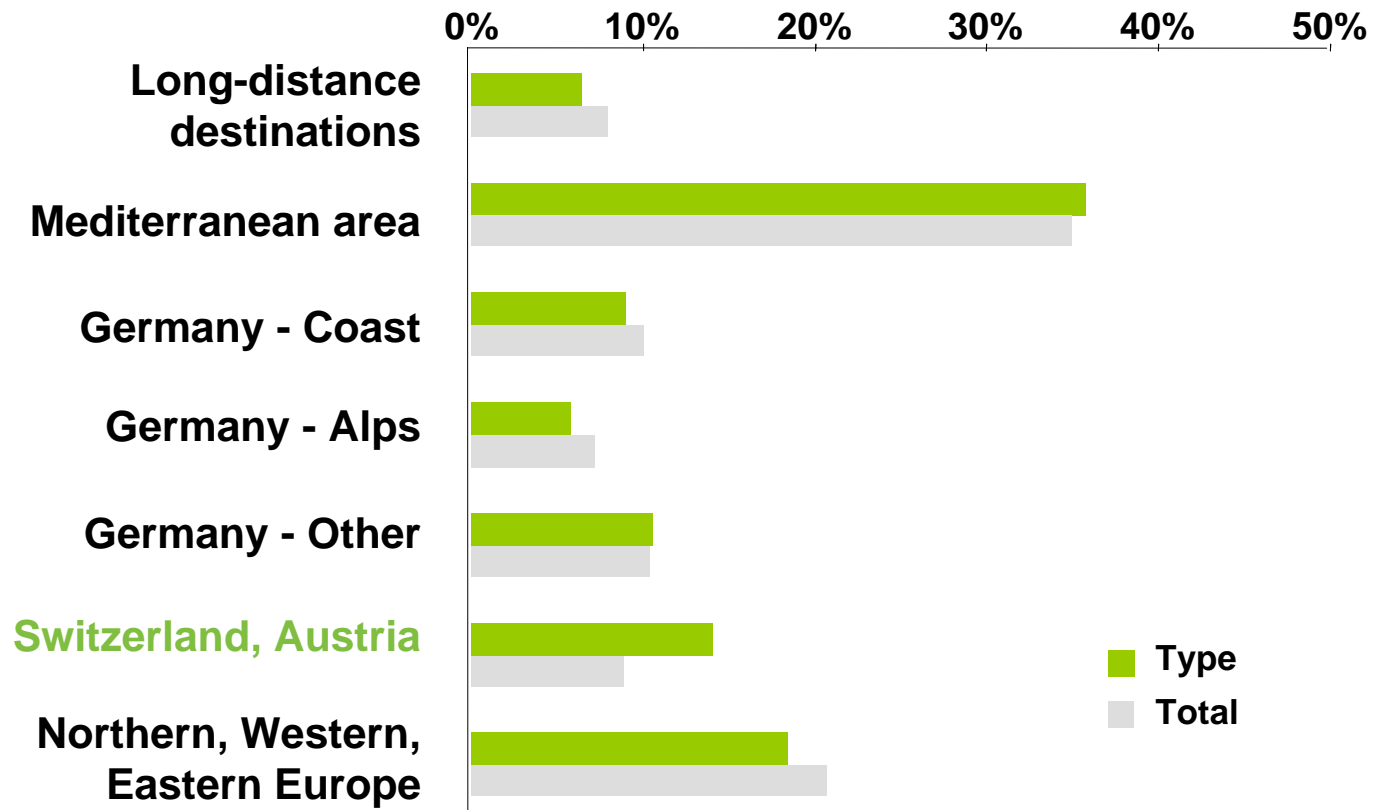
NATURE AND OUTDOOR HOLIDAYMAKERS TRAVEL ORIENTATION AND TYPES OF HOLIDAY

- 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**

➔ **In addition: holiday in the countryside, bicycle and hiking holidays, wellness und fitness, winter holidays in the snow**

NATURE AND OUTDOOR HOLIDAYMAKERS TRAVEL DESTINATIONS 2002 AND 2003

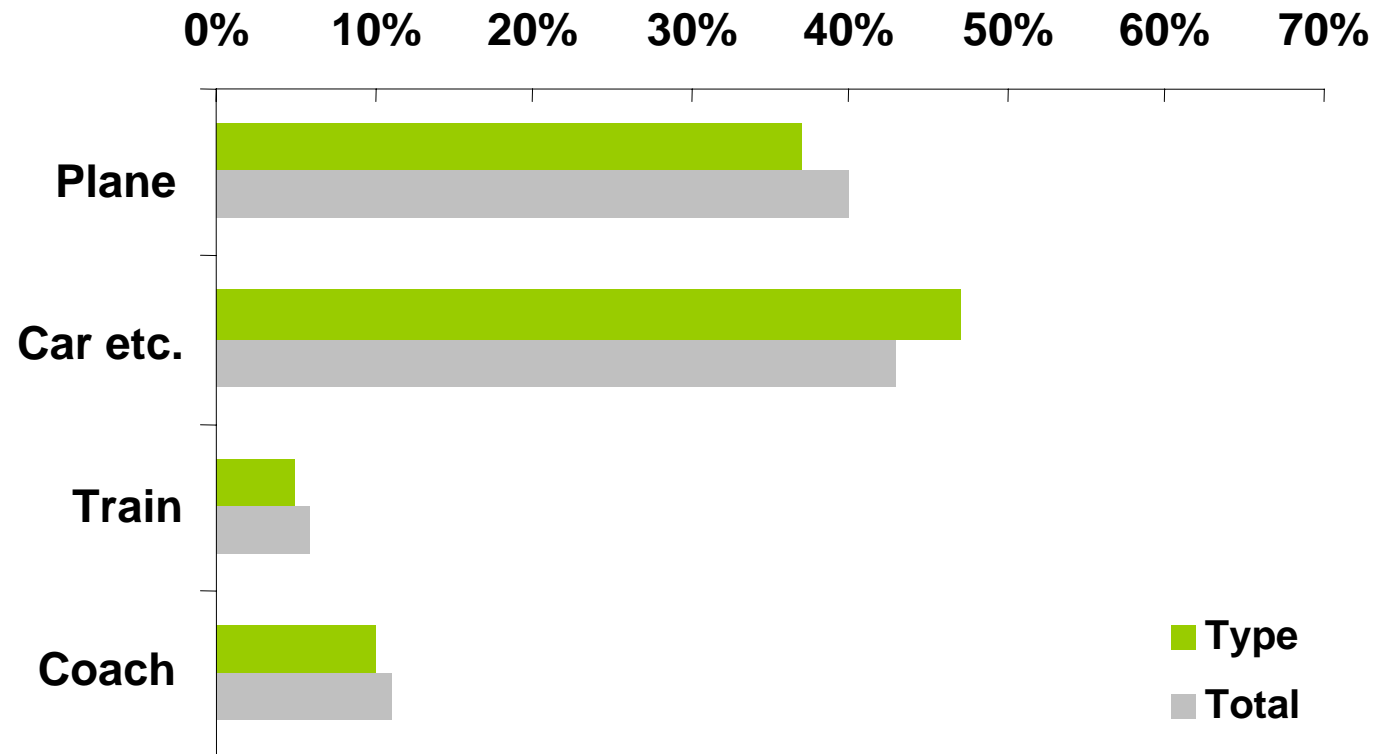


NATURE AND OUTDOOR HOLIDAYMAKERS TRAVEL BEHAVIOUR

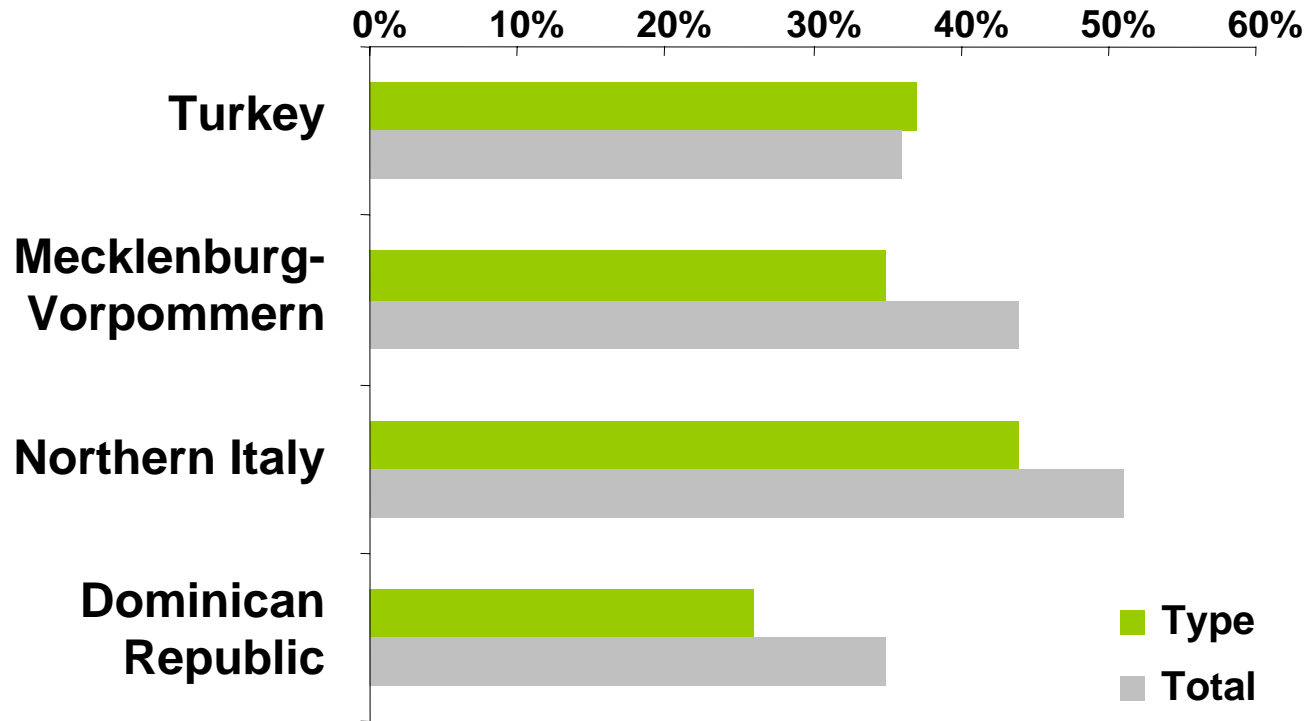
- Package tours are somewhat under-represented
- Journey: more often than not with the car
- Overnight stays are mostly made in hotels / hotel complexes, but also in apartments or clubs
- At holiday destinations, public transport and bicycles are frequently used

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

NATURE AND OUTDOOR HOLIDAYMAKERS TRANSPORTATION FOR THE JOURNEY

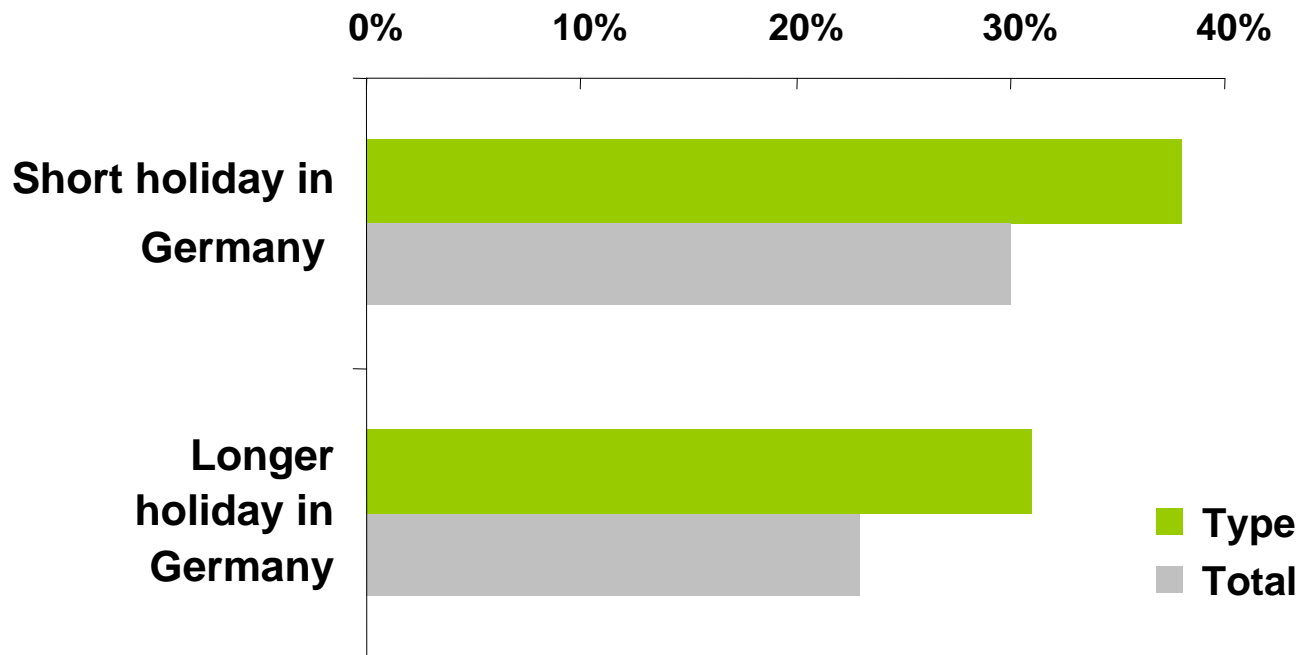


NATURE AND OUTDOOR HOLIDAYMAKERS ATTRACTIVENESS OF SELECTED DESTINATIONS



NATURE AND OUTDOOR HOLIDAYMAKERS ATTRACTIVENESS OF HOLIDAYS IN GERMANY

Likelihood of a holiday in Germany within the following three years



■ Type
■ Total

Answer: "Very likely"

STRATEGIES FOR SUSTAINABLE TOURISM

