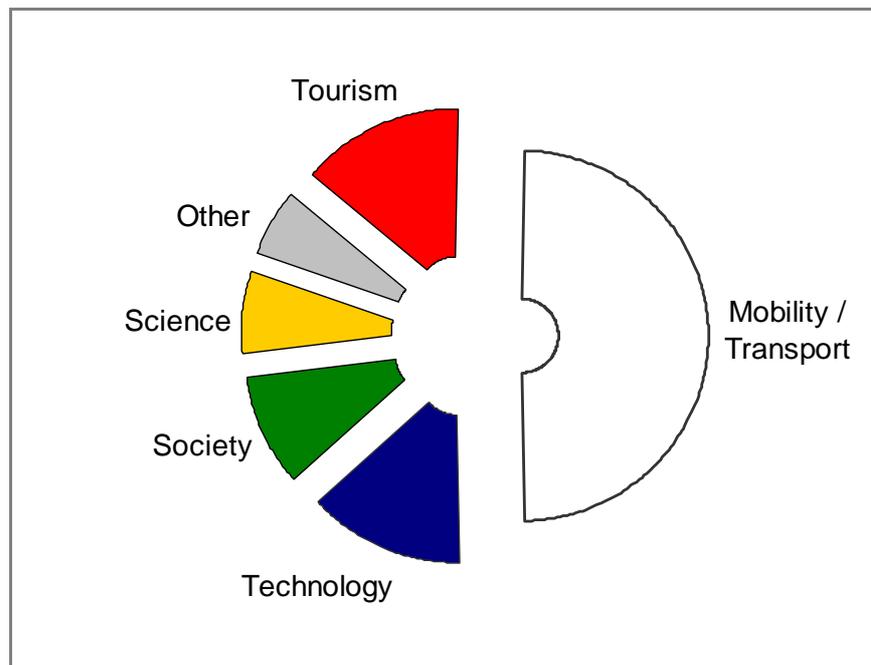


# The Future of Mobility and its Impact on Tourism

## An Investigation into Relevant Long-Term Trends

(A Study in Connection with the World Tourism Forum Lucerne 2009)



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# Content

Executive Summary .....	5
1 Objectives .....	7
2 Sample and response rate.....	8
3 Key Findings .....	9
3.1 Individual travel interests and travel motives .....	9
3.2 Supply and Demand.....	13
3.3 Transportation Systems .....	19
3.4 Environment and ecology .....	20
3.5 Information and Communication Technologies .....	21
3.6 Society.....	22
4 Conclusions .....	24



## **Executive Summary**

The study primarily aims to identify the developments in the mobility sector as well as the resulting perspectives and risks as they impact particular areas of tourism and leisure travel. The time frame extends to the year 2030.

This study does not forecast how the future will be. Instead, it is a summary of “*how experts think the future will be*”. In total, 1,608 experts participated in the online-survey in spring 2009.

Assuming that the experts’ views describe an accurate picture of the future, the evaluated trends will require profound innovations in the world of transport and tourism. The trends convey the feeling that we are living in a period of transition and transformation. To shape a promising future for tourism, a good understanding of the complex interaction between the political, economic, social, environmental and technical aspects of transport activity is needed. Further research and in-depth analysis of selected aspects are required.

The study results were first published in April 2009 during the World Tourism Forum Lucerne. The survey was conducted with the support of the international science and research community in the form of calls for participation.

Lucerne, April 17, 2009



# **1 Objectives**

The study primarily aimed to identify the developments in the mobility sector as well as the resulting perspectives and risks as they impact particular areas of tourism and leisure travel. The time frame extends to the year 2030.

In order to cover the greatest variety of interdisciplinary topics in a structured way, the study was designed around six thematic blocks and the content was summarized accordingly. Similarly, the online survey was designed around these same blocks, which comprise

- availability, capability and capacity of transportation systems
- environmental and ecological aspects (in particular aging transport efficiency matters)
- individual travel interests and travel motives
- impact of information and communication technologies
- societal trends (in particular aging societies)
- supply and demand of mobility services.

The survey is intended for experts and conducted at the international level. It is not representative of opinions among mobility clients or the general population. Expert opinions were gathered online (Internet).

The questionnaire went live on February 2, 2009. It was conducted simultaneously in English and German. It ended on March 2, 2009.

## **Supporters**

The study was conducted and funded entirely by the Institute of Tourism at Lucerne University of Applied Sciences and Arts. It received no material or financial support from third parties. The survey was conducted with the support of the science and research community in the form of calls for participation. The following sponsors deserve a special mention in connection with conducting the survey:

- Worldwide: "**Cities for Mobility**". Promoting participation by means of a special newsletter in English and German. <http://www.cities-for-mobility.net/>
- Worldwide: "**NTA – Network Technology Assessment**". Promoting participation by means of a special newsletter in English and German.
- Worldwide: "**Cosmobilities**". Promoting participation by means of a special newsletter sent by e-mail in English and German.
- France: "**Transport Expertise**" Promoting participation by means of a special newsletter sent by e-mail and at: <http://www.transport-expertise.org>
- Germany: "**German Association for Applied Geography**": Promoting participation by means of a special newsletter sent by e-mail in German.
- The United States: "**TCN – Transportation Communications Newsletter**". Promoting participation by means of a newsletter sent by e-mail in English.

## **2 Sample and response rate**

- 3,949 experts were contacted by email.
- 1,137 experts participated in the survey (= about 29 percent of all contacted experts). In addition, 471 experts chose to participate anonymously, making use of an “anonymous weblink” provided through an email-newsletter.

In total, **1,608 experts** participated in the survey. Their respective answers build up the database for further analysis.

### Participants: Fields of expertise (work fields) in the sample

	Frequency	Percent
Tourism	228	14.2 %
Mobility / Transport	792	49.3 %
Technology	219	13.6 %
Society	158	9.8 %
Science	116	7.2 %
Other fields	95	5.9 %
Total	<b>1608</b>	100.0 %

### Participants: Residence of experts in the sample, by continent

	Frequency	Percent
North America	216	13.4 %
South America	37	2.3 %
Europe	1129	70.2 %
Asia	115	7.2 %
Africa	37	2.3 %
Australia	39	2.4 %
No response	35	2.2 %
Total	<b>1608</b>	100.0 %

### **3 Key Findings**

All results refer to the time horizon “year 2030”.

The experts’ responses refer to their respective country/continent.

The key findings represent statements where a vast majority of experts expressed agreement (or disagreement). The statements can be seen as describing major trends in the field of tourism and transport (from an expert’s point of view).

#### **3.1 Individual travel interests and travel motives**

- **Virtual travel will not lead to a reduction of travel demand.**

The vast majority of experts (77%) think that by 2030 “virtual worlds” will not have the impact to cause a significant decline in conventional travel. Interviewees employed in the fields of science and technology agree the most.

- **Comfort aspects will be of high relevance for customers when making modal (transport) choices.**

A majority of experts see a continuing (34%) or rising (64%) relevance of comfort criteria when customers choose a means of transport. European, Asian and North American experts rate the importance of comfort aspects especially high.

- **Travel time (door-to-door) will continue to gain in importance for customers when making modal (transport) choices.**

Travel time spent in transportation systems is seen as increasingly relevant by two-thirds (66%) of all experts, throughout all continents. The frequency of schedule of a means of transport strongly relates to this aspect: 73% of all experts consider “frequency” to be gaining in importance.

- **Environmental aspects will continue to gain importance when making a modal choice.**

When it comes to choosing a means of transportation, the issue of environmental friendliness is considered to be of increasing importance by a vast majority of experts (73%). North American and European experts express this view more often than other countries. African experts rate environmental aspects relatively low (for their respective countries).

- **Usage flexibility will become increasingly relevant when choosing a means of transportation.**

When it comes to choosing a means of transportation, the degree of “usage flexibility” is considered to be increasingly important by 77% of all experts. Australian and European experts rate this aspect especially high.

- **Time for one’s self and one’s partners and family will become even more relevant.**

“Time for one's self, having control over one's own time” is seen as an increasingly relevant travel motivator by 59% of all experts, whereas 35% consider that the relevance of this travel motivator will not change. “Time for one’s partner and family” is seen as an increasingly relevant travel motivator by most of the experts, whereas 40% think the relevance of this travel motivator will not change.

- **Health prevention and rehabilitation will increase as relevant travel motivators.**

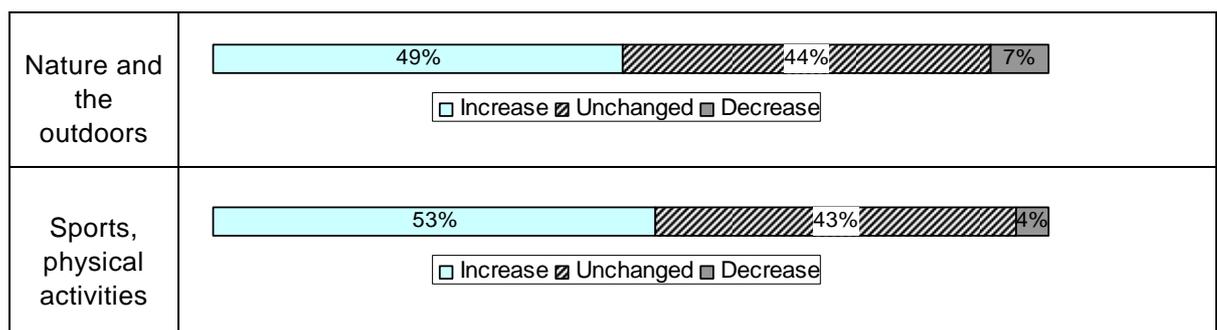
A majority of experts think that both “Health tourism for rehabilitation purposes” (66%) and “Preventive health tourism” (71%) will be of increasing relevance by 2030. Australian, European, and Asian experts agree the most. Experts in the field of tourism rate these travel motivators especially high. In general, the travel motive “to be pampered” is expected to gain significantly in importance, too.

- **Intercultural experiences, broadening one’s horizon and knowledge gains will be increasingly important travel motivators.**

A majority of experts see a continuing (45–46%) or rising (45–47%) relevance of intercultural experiences, broadening one’s horizon and knowledge gain as travel motivators. Asian and Australian experts agree the most. Experts in the field of tourism rate these travel motivators especially high.

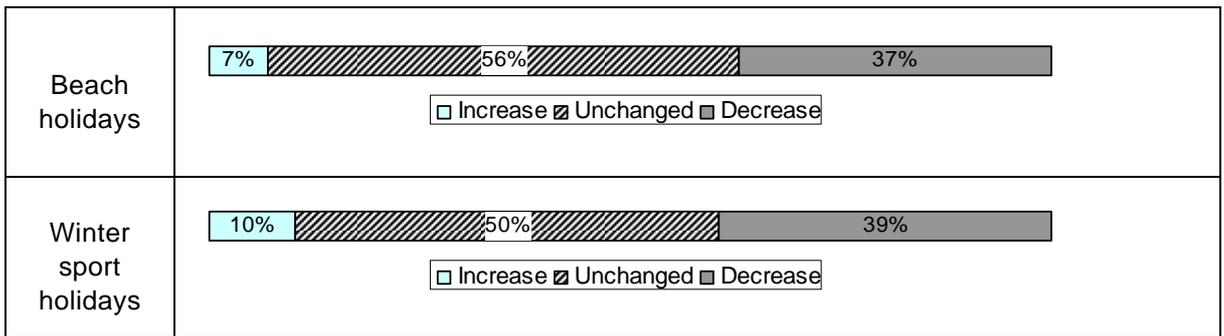
### 3.1.1 Comparisons

#### 3.1.1.1 Sports, physical activities & experiencing nature and outdoors



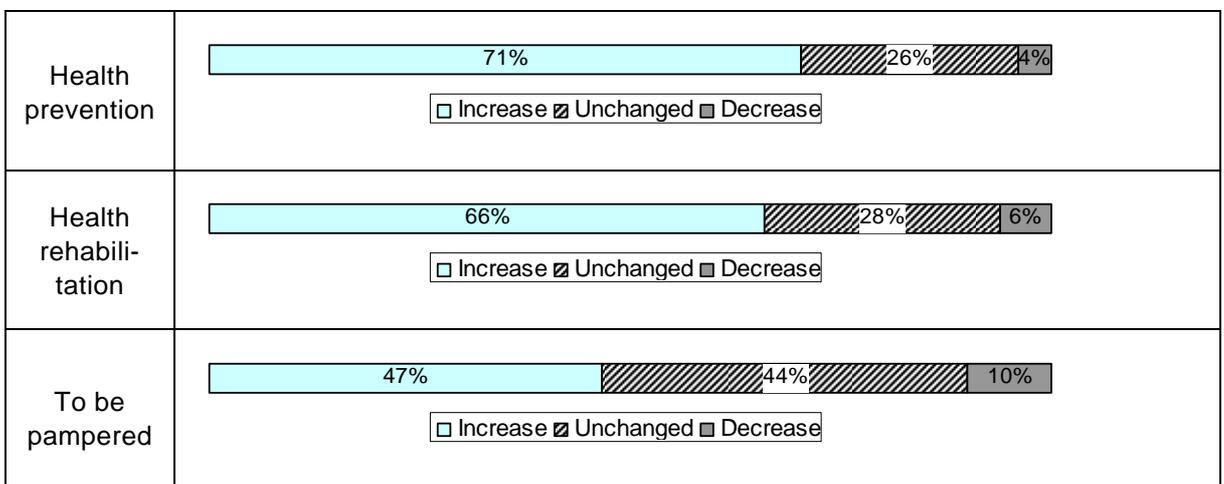
Sports and physical activities, experiencing nature and outdoors will become increasingly important as travel motivators.

### 3.1.1.2 Classic beach holidays & winter sport holidays



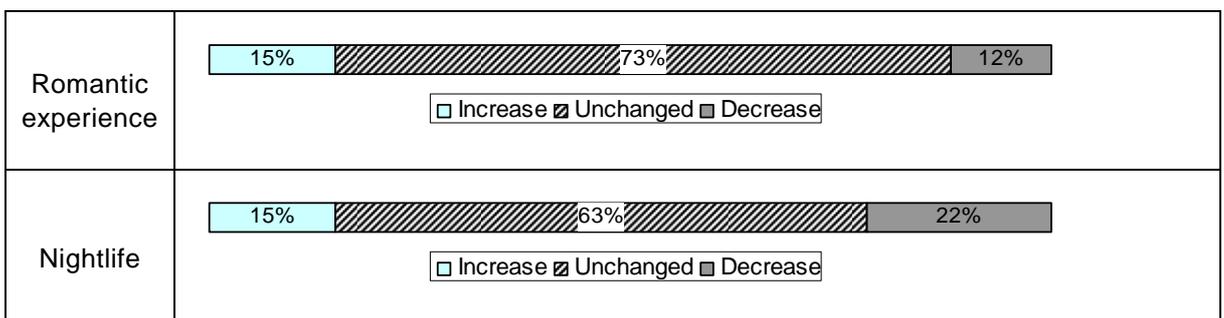
Classic beach holidays and winter sport holidays are expected to stagnate and eventually decline in relevance.

### 3.1.1.3 Health prevention & health rehabilitation tourism & pampering



“Health tourism for rehabilitation purposes” and “Preventive health tourism” will be of increasing relevance by 2030.

### 3.1.1.4 Nightlife & opportunities for romantic experiences



Nightlife and romantic experiences remain relevant.

### 3.1.1.5 Intercultural experiences & broadening one's horizon & knowledge gains

Knowledge gain	<p>45% 46% 9%</p> <p>□ Increase ▨ Unchanged ■ Decrease</p>
Intercultural experience	<p>46% 45% 9%</p> <p>□ Increase ▨ Unchanged ■ Decrease</p>
Learning, broadening horizons	<p>47% 45% 7%</p> <p>□ Increase ▨ Unchanged ■ Decrease</p>

Intercultural experiences, broadening one's horizon and knowledge gains will become more relevant.

### 3.1.1.6 Time for one's self & time for partner and family

Time for one's self	<p>59% 35% 7%</p> <p>□ Increase ▨ Unchanged ■ Decrease</p>
Time for partner and family	<p>50% 42% 8%</p> <p>□ Increase ▨ Unchanged ■ Decrease</p>

Time for one's self and time for one's partner and family will get even more relevant.

## 3.2 Supply and Demand

- **The relevance of travel booking services through local travel agencies will decrease.**

The majority of experts (73%) agree that the relevance of travel booking services through (local) travel agencies will decrease by 2030. Especially European (77%) and North American (69%) experts see a decreasing importance of travel agency services.

- **The relevance of online travel communities and Internet-based hotel ratings will increase.**

According to 84% of the experts, the importance of online travel communities will increase by 2030. Accordingly, 86% of the experts are also convinced that the importance of Internet-based hotel ratings by clients will increase by 2030. Experts from all continents and all work fields anticipate relevant gains.

- **Real-time information via mobile phone devices will gain in importance.**

The vast majority of experts (85%) agree that the importance of real-time travel information via mobile phone will increase by 2030. The majority of experts agree throughout all continents and all work fields.

- **The demand for short private trips will increase.** The majority of experts (73%) expect that by 2030 the demand for short private trips (1 to 3 overnight stays) will increase.

- **The demand for longer business trips is expected to decrease.**

Just 16% of the experts believe that business trips (4 or more overnight stays) will increase. 47% of the experts expect the opposite: a decrease in the demand for longer business trips.

- **Business and private trips are expected to become shorter.**

Private trips are expected to become shorter. Business trips are expected to become even significantly shorter.

- **Dynamic packaging will further gain in relevance.**

79% of all experts think that the importance of dynamic packaging (individual combination of trip components) will increase by 2030.

- **A free use of media will be of increased importance in the case of all-inclusive packages.**

77% of the experts agree that the importance of a free-of-charge use of media (Internet, print media, TV) in the case of all-inclusive packages will increase by 2030.

- **By 2030, navigation service providers will require payment for including company listings in their navigation charts and maps.**

The majority of experts (83%) agree that by 2030 navigation service providers in their country will require payment for including company listings in their navigation charts.

- **The hospitality industry has been underestimating the importance of “good connections to public transportation” for their customers.**

The importance of “good connections to public transportation” as a relevant criterion for guests when choosing a hotel has been underestimated by the hospitality industry – most of the experts (78%) are convinced that this will be the case.

- **By 2030, the attractiveness of today’s top destinations will have become overshadowed by other regions and destinations.**

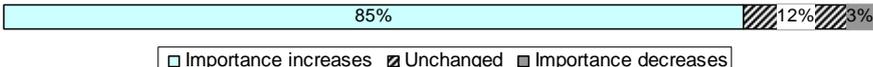
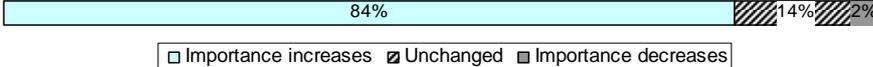
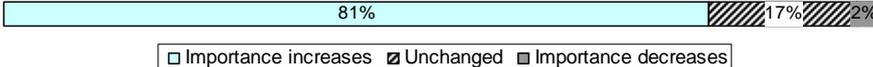
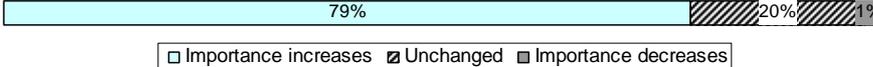
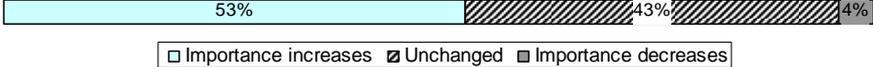
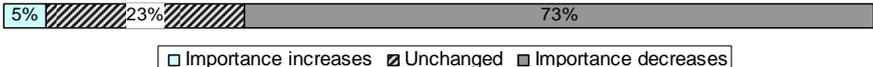
Most of the experts (72%) agree with the statement that the attractiveness of many today’s top destinations will be overshadowed by other regions by 2030. The African (82%) and Australian (81%) experts strongly agree with this statement; European (71%) experts agree less often.

- **As a destination for holiday trips, Asia will be chosen more frequently.**

57% of the experts agree that by 2030 people in their respective countries will choose Asia more frequently for holiday trips (more than 4 overnight stays) than they do today.

### 3.2.1 Comparisons

#### 3.2.1.1 Services

Internet-based hotel ratings by clients	 <p>86%</p> <p>□ Importance increases   ▨ Unchanged   ■ Importance decreases</p>
Live travel information via mobile phone	 <p>85%</p> <p>□ Importance increases   ▨ Unchanged   ■ Importance decreases</p>
Online travel communities	 <p>84%</p> <p>□ Importance increases   ▨ Unchanged   ■ Importance decreases</p>
Personalized travel information, customer profiles	 <p>81%</p> <p>□ Importance increases   ▨ Unchanged   ■ Importance decreases</p>
Dynamic packaging	 <p>79%</p> <p>□ Importance increases   ▨ Unchanged   ■ Importance decreases</p>
Privacy zones, lounges	 <p>53%</p> <p>□ Importance increases   ▨ Unchanged   ■ Importance decreases</p>
Booking trips through travel agencies	 <p>5%</p> <p>23%</p> <p>73%</p> <p>□ Importance increases   ▨ Unchanged   ■ Importance decreases</p>

### 3.2.1.2 All-inclusive packages and free services

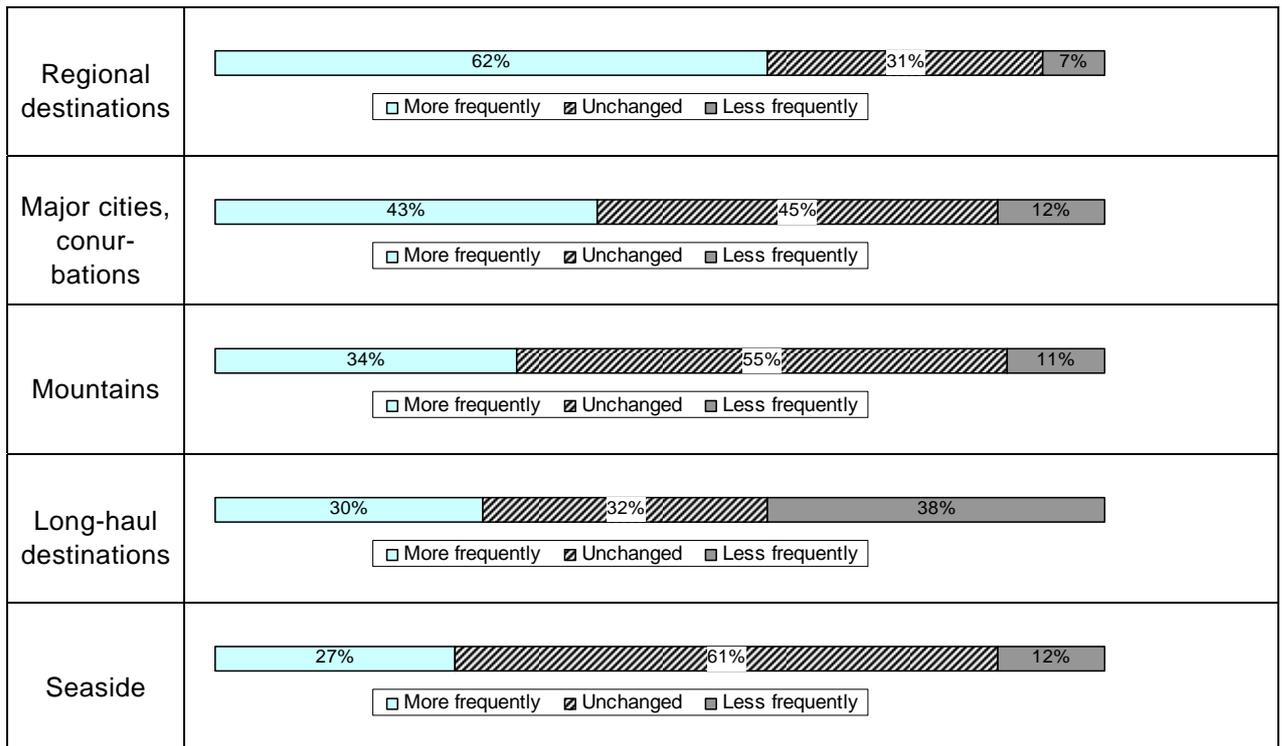
Free use of media (Internet, print media, TV)	<p>77% 20% 3%</p> <p>□ Importance increases   ■ Unchanged   ■ Importance decreases</p>
Security services	<p>59% 38% 3%</p> <p>□ Importance increases   ■ Unchanged   ■ Importance decreases</p>
Free shuttle services	<p>57% 39% 4%</p> <p>□ Importance increases   ■ Unchanged   ■ Importance decreases</p>
Free luggage service	<p>55% 40% 5%</p> <p>□ Importance increases   ■ Unchanged   ■ Importance decreases</p>
Free use of fitness and wellness services	<p>53% 43% 4%</p> <p>□ Importance increases   ■ Unchanged   ■ Importance decreases</p>
Free use of a car	<p>38% 49% 13%</p> <p>□ Importance increases   ■ Unchanged   ■ Importance decreases</p>

### 3.2.1.3 Duration and demand for private trips

Private short trips (1 to 3 overnight stays)	<p>73% 24% 3%</p> <p>□ Increase   ■ Unchanged   ■ Decrease</p>
Private 1-day excursions	<p>57% 36% 8%</p> <p>□ Increase   ■ Unchanged   ■ Decrease</p>
Holiday trips (4 or more overnight stays)	<p>27% 55% 19%</p> <p>□ Increase   ■ Unchanged   ■ Decrease</p>

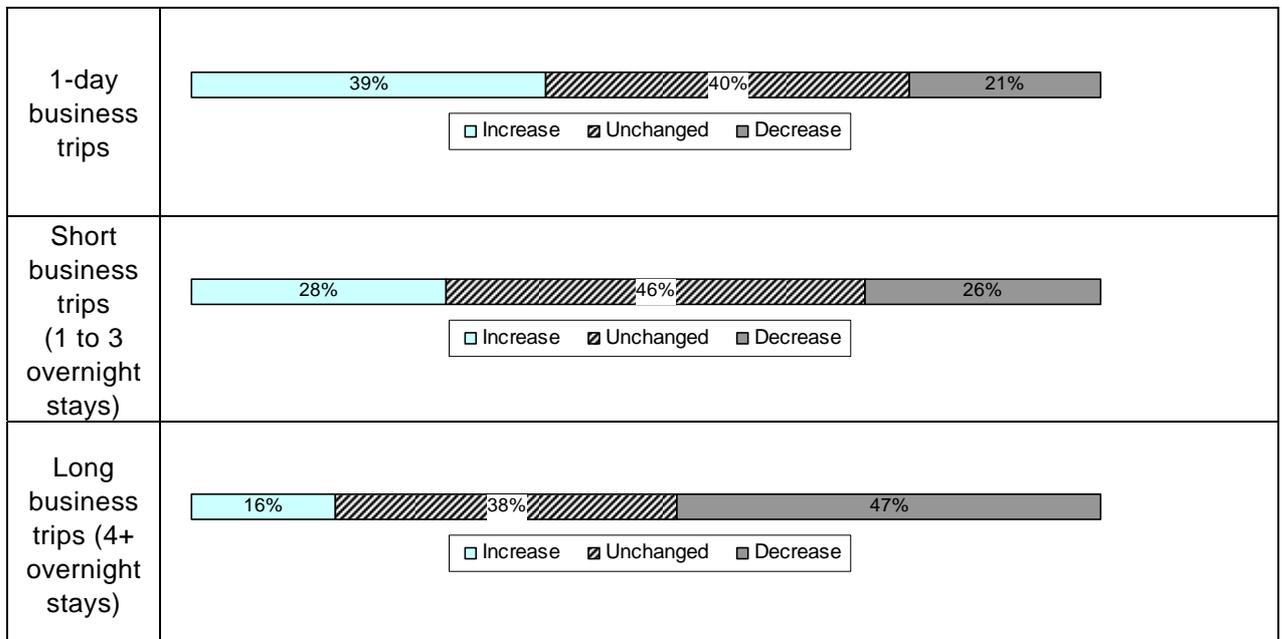
Private trips are expected to be shorter.

### 3.2.1.4 Holiday trips and destination types



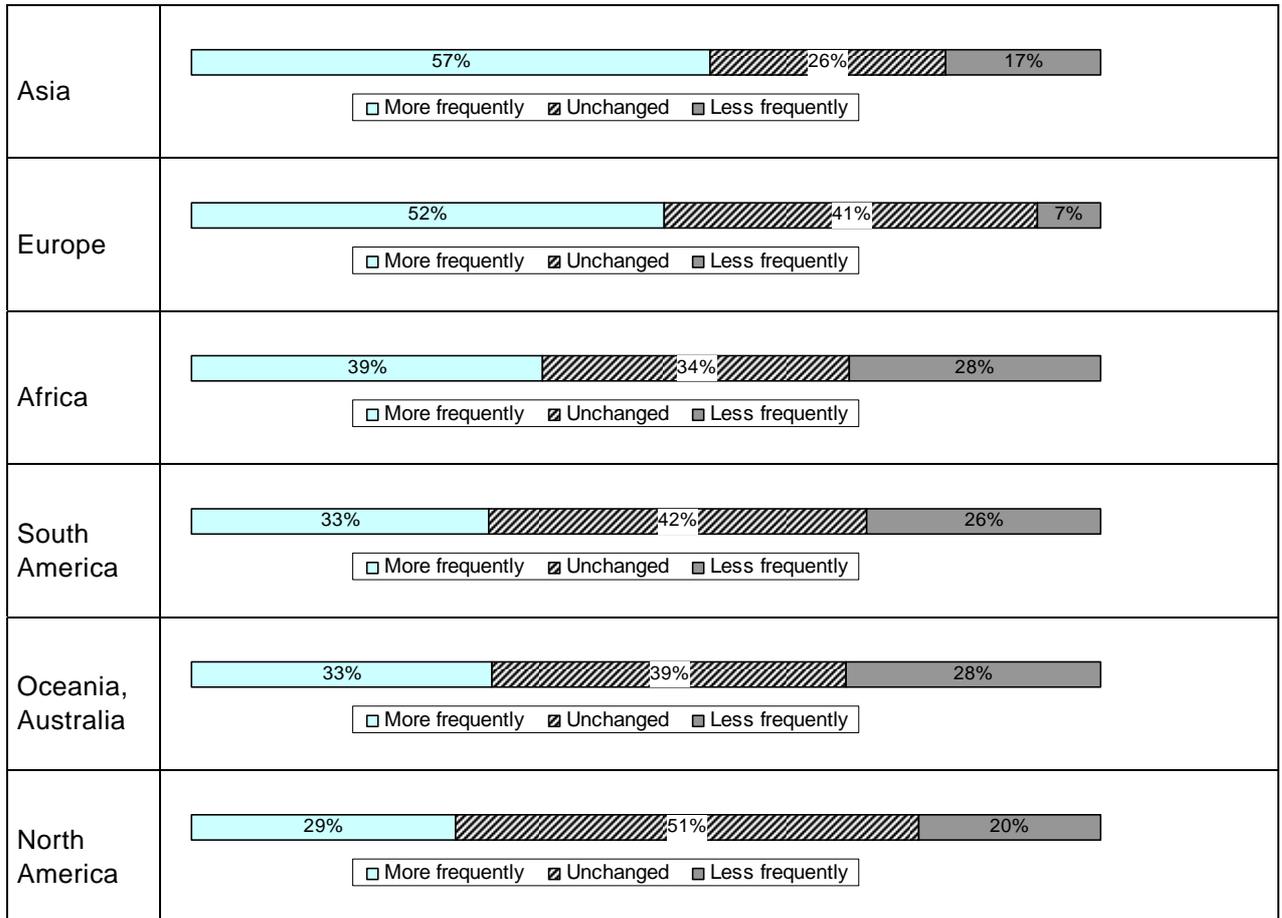
Regional destinations and cities are expected to be frequented more often for holiday trips.

### 3.2.1.5 Duration and demand for business trips



Business trips are expected to become significantly shorter.

### 3.2.1.6 Holiday trips by continents



Asia, Europe and Africa are expected to be visited significantly more often.

### 3.3 Transportation Systems

- **The share of public transportation systems in the modal split of the transportation sector as a whole will have increased significantly by 2030.**

A vast majority of experts (82%) agree with this view. A relatively low rate of agreement is found among North (76%) and South American experts (61%).

- **Hiking, biking and other forms of low-speed, human-powered mobility will become increasingly relevant.**

Low-speed forms of mobility, e.g., hiking or biking, are considered to be of increasing relevance by a vast majority of experts (81%) throughout all continents.

- **People will regard a private car for leisure trips as very important.**

A vast majority of experts (83%) agree with this view. The South American experts fully agree (100%).

- **The private car will be the most widely used means of transportation for reaching places on the outskirts of cities and in the suburbs.**

The majority of experts (74%) agree with this view. American experts agree the most (North America 85%; South America 84%).

- **Road pricing systems will have been introduced for all private and commercial vehicles throughout all continents except Africa.**

75% of all experts agree. South American (82%) and European experts (72%) agree the most.

- **In Asia and Europe, air travel on short- and medium-haul routes will have largely been replaced by modern high-speed trains.**

The majority of experts (61%) agree with this view. European (68%) and Asian (72%) experts strongly agree, while American and Australian experts mostly disagree (65–80% disagreement).

- **Asia, America and Australia especially will have an economic interest in offering maglev trains for high-speed inter-city travel and rapid airport connections.**

The majority of experts (ca. 60%) agree with this view. North American (75%), Australian (75%), Asian (79%) and African (82%) experts strongly agree with a focus on high-speed inter-city travel. European and South American experts seem to be divided over this issue.

- **Large luggage will be handled by package shipping companies that will send it as an express door-to-door delivery directly to the destination.**

The majority of experts (68%) on all continents agree. Asian and African experts agree most strongly (more than 80%, respectively).

## 3.4 Environment and ecology

- **High-speed rail trains and overnight trains are seen as a suitable alternative to short-haul flights**

Most experts (94%) from all continents and all work fields consider high-speed rail trains a suitable alternative to air travel for distances up to 650 miles / 1000 km. A vast majority of experts (84%) from all continents and work fields also see overnight trains with comfortable sleeping compartments as a suitable alternative to short-haul flights.

- **High-speed maglevs (magnetic levitation trains) are seen as a suitable alternative to short-haul flights**

Vast majorities of Asian (93% agree), African (83%) and North American (80%) experts see maglev trains as a suitable alternative to air travel on distances of up to 650 miles / 1000 km. Among all experts, European experts (51%) agree the least. 81% of tourism experts and 66% of science and technology experts rate maglevs as a suitable alternative to air travel.

- **Bicycle traffic will have a higher share in the modal split**

A majority of experts (80%) from all continents and from all work fields agree that by 2030 bicycle traffic in cities will have a significantly higher share in the modal split than it does today.

- **Climate change consequences will have a strong impact on travel and most means of transportation.**

A vast majority of experts agree that by 2030 the consequences of climate change will significantly interfere with transportation schedules of short- and medium-haul air travel (84% agreement), long-haul air travel (82%) and even high-speed train travel (61%). Long-distance bus travel (64%) and passenger boat travel (68%) will be affected, too. The majority of experts from all continents and from all work fields agree with this view.

### 3.5 Information and Communication Technologies

- **Communication, information, booking, navigation, and payment systems will converge into mobile end-user devices. Most travel services will be booked using these mobile devices.**

While Asian, African and American experts fully agree (100%, respectively), European experts agree somewhat less (93%) that these systems will converge. The aspect of booking through mobile devices is confirmed by 96% of Asian experts – but only by 81% of the European experts.

- **Mobile devices will offer many technical functions for travelers.**

A vast majority of experts see a high relevance for the technical functions of mobile devices for travelers. Most experts agree that mobile devices will give directions (99% agreement); will act as tour guide (93%); will have credit payment functions (credit 82%, credit cards 73%), allow for last-minute reservations (86%), will make use of voice recognition (78%) and offer real-time translation (73%).

- **Tracing and tracking of all luggage will be the norm.**

The majority of experts strongly agree that tracing and tracking of luggage will have become standard procedure by 2030 (87%). While African, North American and Asian experts mainly agree (100%; 98%; 96%), European experts agree to a significantly lower extent (85% agreement).

- **In general, Asian and North American experts are more convinced about travel-relevant communication technologies than Europeans.**

In general, when expert opinions about the perspectives of mobile technical devices for travelers are compared by continent, Asian and North American experts tend to agree more often than European experts. This indicates that the perception of technologies could be influenced by cultural and/or societal background.

## 3.6 Society

- **Higher average costs of travel expected in 2030 (adjusted for inflation).**

The majority of experts expect higher costs for business, leisure and holiday travel (81%; 80%; 78% agreement).

- **External costs will be integrated into the price of transportation.**

The majority of experts (63%) think that by 2030 the external costs (externalities) of travel will largely have been integrated into the price of transportation. Experts from all continents and all work fields strongly agree with this statement.

- **Safety remains an issue.**

A majority of experts (64%) expect that their respective countries will have effective measures to protect travelers against acts of violence or terrorist threats. 36% disagree, which is a relatively high percentage, considering the societal relevance of the topic.

- **Profiling and data privacy remain sensitive issues.**

A majority of all experts (64%) expect that customers will routinely disclose their mobility preferences to receive personalized travel services. While Australian and North American experts agree most often (91%; 88%), experts from Europe agree least often (59%).

Among all experts, a majority (58%) expect reliable data privacy measures to be in place for all client profiles. Experts from North America agree the most (77%), Australian (55%) and European (55%) experts agree significantly less often.

42% of all experts doubt the reliability of data privacy measures. Considering the societal relevance of the topic, this can be seen as a high percentage.

- **Leisure travel time budget: shrinking here and growing there...**

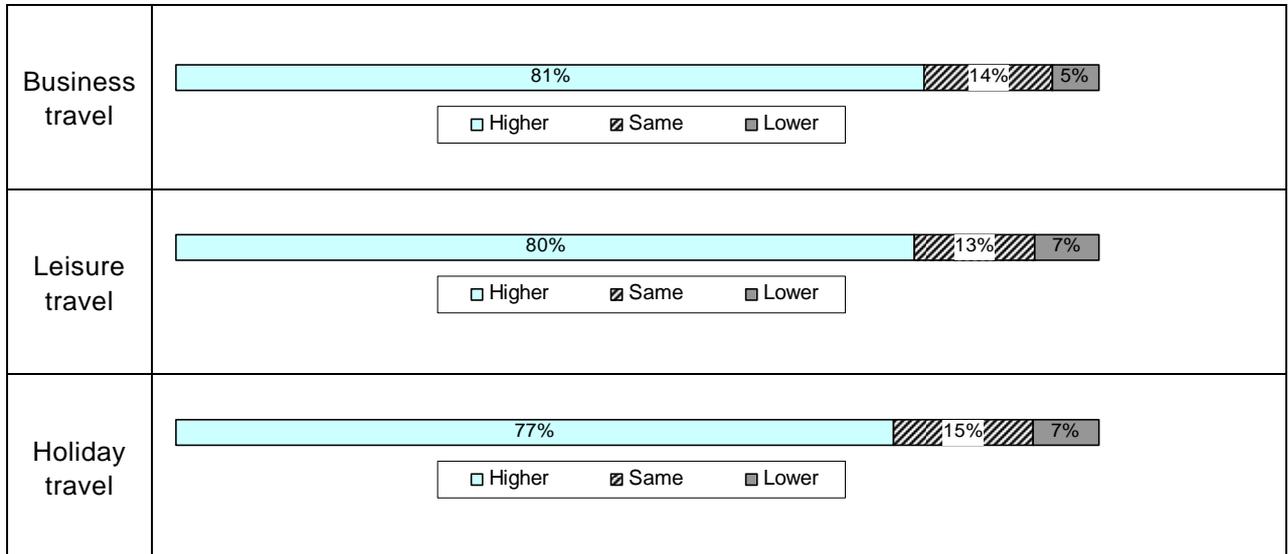
The majority of experts from Asia (68%), Australia (64%) and Africa (57%) agree that people in their countries will have more time available for leisure travel than they have today. Experts from North America (61 %) and Europe (67 %) disagree and expect stagnating or shrinking time budgets for leisure travel in their respective countries.

- **High-quality rail service is an important basic provision for the public sector**

Experts living in Europe (87%), Asia (86%) and Africa (94%) agree more with this statement than experts from other continents.

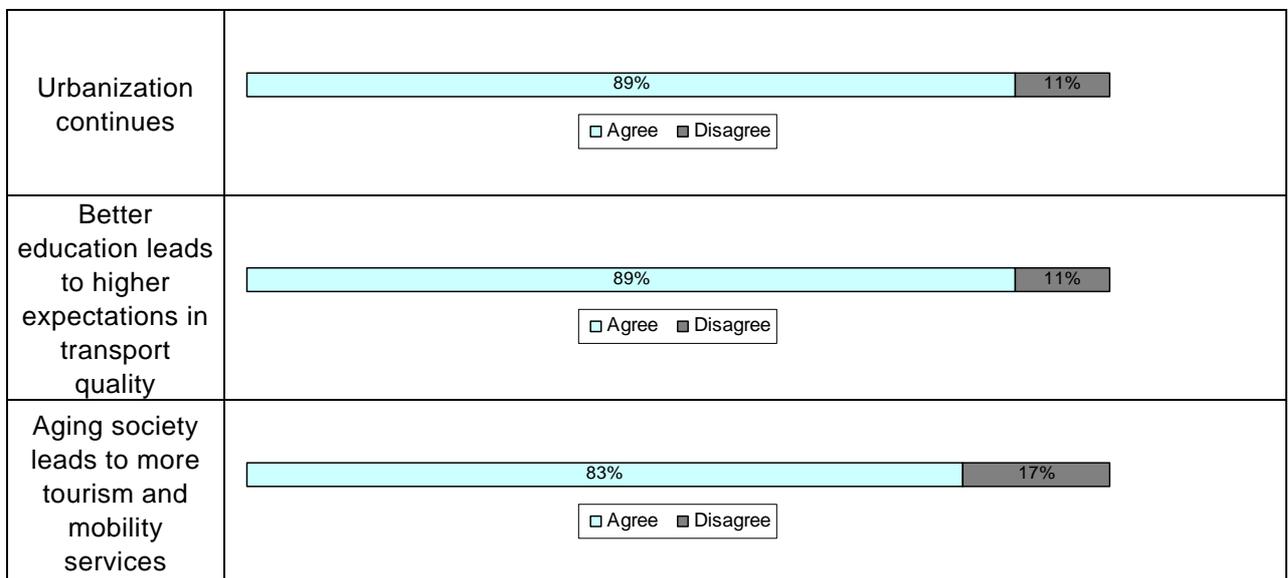
### 3.6.1 Comparisons

#### 3.6.1.1 Average costs of travel and travel purpose



The majority of experts expect higher costs for business, leisure and holiday travel.

#### 3.6.1.2 Impact of megatrends



## 4 Conclusions

Note: This conclusion does not forecast how the future will be. Instead, it is a summary of “**how experts think** the future will be”.

Assuming that the experts' views describe an accurate picture of the future and that current trends will predominantly continue, a scenario can be constructed (based on the experts' answers) in which services in mobility and tourism in 2030 will play a significant role in an eventually even more globalized world economy.

The tourism and leisure travel sector will have to satisfy a changed demand for mobility.

In general, North America and Asia will be the trendsetters for the realization of most innovations in the field of travel services and transport-related technologies.

The **societal trends** indicate major changes in the way we will live and travel.

The world will be populated by people who will live in dense urban areas (urbanization continues) and in a changed climate that will affect the availability and reliability of means of transportation and will influence customers' travel behavior.

The average cost of travel in 2030 will be significantly higher for all travel purposes (tourism, leisure, business). This is also due to the trend that by 2030 the external costs (externalities) of travel will largely have been integrated into the price of transportation in many countries.

Through travel and mobility, people will aim to build even stronger relationships with neighboring countries and get a better (and mutual) understanding of other cultures in the world. The desire to “gain knowledge in a nice and interesting way” can be seen as a major driver for individual travel and tourism activities.

While there is optimism that effective measures to protect travelers against acts of violence or terrorist threats will have been found and implemented, the negative consequences of such security will become an issue: profiling and reliability of data privacy will remain sensitive issues.

When it comes to choosing a means of transportation, the issue of **environment and ecology** will be of major importance.

Climate change consequences will have a strong impact on travel and most means of transportation. By 2030, the consequences of climate change will significantly interfere with transportation schedules of air travel, public transportation, passenger boat travel (cruises) and even the private car. Due to consequences of climate change, long distance travel in 2030 will be less reliable when it comes to schedules, travel time and availability of services. Airline and individual car transport will be most exposed to the impacts of this trend.

The aim to replace short-haul air travel by other means of transport will further support the construction high-speed ground transport infrastructure. High-speed trains (conventional steel-wheel trains and maglev trains) will be suitable alternatives to air travel for distances up to 650 miles / 1000 km.

By 2030, bicycle traffic in cities will have a significantly higher share in the modal split than it does today. Hiking, biking and other forms of low-speed, human-powered mobility will become increasingly relevant.

**Information and communication technologies** will continue to alter people's lives.

People's lives will have been transformed by improvements and breakthroughs in information and communication technologies. In the fields of mobility and tourism, this will lead to both advantages and disadvantages. While the service quality will significantly improve for those that can afford such individual services, the overall reliability of data privacy measures (client profiles) remains in doubt.

In 2030, mobile devices will offer many technical functions for travelers and will become increasingly indispensable for business, leisure and tourism travel. Most travel services will be booked using mobile devices and systems for communication, information, booking, navigation, and payment will have converged in these mobile end-user devices. Accordingly, tracing and tracking of all luggage will be the norm when travelling.

Virtual travel in "virtual worlds" will not have enough impact to cause a significant decline in conventional travel and will not lead to a reduction in travel demand.

Asia and North America are the trendsetters for further innovation, implementation and marketing of information and communication technologies in the fields of mobility and tourism. Experts from Asia and North America are more open and more convinced about travel-relevant communication technologies than Europeans.

When it comes to **supply and demand**, significant changes are to be expected.

As a destination for holiday trips, customers will choose Asia more frequently. Accordingly, by 2030, the attractiveness of today's top destinations in other regions of the world will have become overshadowed by new regions and destinations.

By 2030, the demand for private short trips (1 to 3 overnight stays) will increase. In contrast, the demand for longer business trips (4 or more nights) will decrease. The duration of business trips (duration) will be generally shorter. Also, according to the experts, the importance of good connections to public transportation as a relevant criterion for guests when choosing a hotel has been underestimated by the hospitality industry in most countries up to now (Japan is a major exception here).

Travel booking services provided by (local) travel agencies will be less relevant by 2030. Instead, there will be more individual booking through the Internet. Travel decisions will be based on statements found on online travel communities. Internet-based hotel ratings will have a major influence on customers' booking decisions. Dynamic packaging (individual combination of trip components) will be intensively used.

The importance of real-time travel information via mobile phone will increase by 2030. Here, navigation service providers will require payment for including company listings in their navigation charts.

At the same time, travelers will expect a free-of-charge use of media (Internet, print media, TV), especially in the case of all-inclusive packages.

**Individual travel interests and travel motives** will have a big influence on the individual customers' choice of means of transport and on all travel-related booking decisions.

The opportunity to have time for one's self and have control over one's own time will be of high relevance and an important travel motivator when it comes to holiday travel. Equally "Time for the partner and family" will continue to be a highly relevant travel

motivator. Making use of one's time to have intercultural experiences, to broaden one's horizon and to gain knowledge will continue to be an important travel motivator. In Asia and Australia, these travel motivators will be especially relevant.

Both "Health tourism for rehabilitation purposes" and "Preventive health tourism" will be of high relevance by 2030. In most countries, the travel motive "to be pampered" is expected to gain significantly in importance, too.

The overall travel time (door-to-door) will continue to be very important for all customers (tourism, leisure and business travelers). The frequency of schedule of a means of transport that strongly influences overall travel time will gain in importance, too.

Comfort aspects will have a high relevance for customers when making modal (transport) choices. Accordingly, usage flexibility becomes increasingly relevant when choosing a means of transportation. The importance of "good connections to public transportation" as a relevant criterion for guests when choosing a hotel has been underestimated by the hospitality industry.

The role of public **transportation systems** will increase worldwide.

By 2030, the share of public transport in the modal split of the transportation sector as a whole will have increased significantly. In Asia and Europe, air travel on short and medium haul routes will have largely been replaced by modern high-speed trains. North America and Asia will be the trendsetters for the innovation of new high-speed transportation technologies, such as magnetic levitation trains (short: "maglev") for high-speed inter-city travel and rapid airport connections.

Large luggage (tourism travel, business travel) will be handled by package shipping companies that will send it as an express door-to-door delivery directly to the destination. Tracing and tracking will be the norm.

People will regard a private car for leisure trips as very important. The private car will be the most widely used means of transportation for reaching places on the outskirts of cities and in the countryside.

## **Outlook**

Assuming that the experts' views describe an accurate picture of the future, the evaluated trends will require profound innovations in the world of transport and tourism. The trends convey the feeling that we are living in a period of transition and transformation. To shape a promising future for tourism, a good understanding of the complex interaction between the political, economic, social, environmental and technical aspects of transport activity is needed. Further research and in-depth analysis of selected aspects are required.

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