

# TRANSPORT AND LEISURE

ROUND  
TABLE

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EUROPEAN CONFERENCE OF MINISTERS OF TRANSPORT

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REPORT OF THE  
HUNDRED AND ELEVENTH ROUND TABLE  
ON TRANSPORT ECONOMICS

held in Paris on 15th-16th October 1998  
On the following topic:

# TRANSPORT AND LEISURE

EUROPEAN CONFERENCE OF MINISTERS OF TRANSPORT

## EUROPEAN CONFERENCE OF MINISTERS OF TRANSPORT (ECMT)

The European Conference of Ministers of Transport (ECMT) is an inter-governmental organisation established by a Protocol signed in Brussels on 17 October 1953. It is a forum in which Ministers responsible for transport, and more specifically the inland transport sector, can co-operate on policy. Within this forum, Ministers can openly discuss current problems and agree upon joint approaches aimed at improving the utilisation and at ensuring the rational development of European transport systems of international importance.

At present, the ECMT's role primarily consists of:

- helping to create an integrated transport system throughout the enlarged Europe that is economically and technically efficient, meets the highest possible safety and environmental standards and takes full account of the social dimension;
- helping also to build a bridge between the European Union and the rest of the continent at a political level.

The Council of the Conference comprises the Ministers of Transport of 39 full Member countries: Albania, Austria, Azerbaijan, Belarus, Belgium, Bosnia-Herzegovina, Bulgaria, Croatia, the Czech Republic, Denmark, Estonia, Finland, France, FYR Macedonia, Georgia, Germany, Greece, Hungary, Iceland, Ireland, Italy, Latvia, Lithuania, Luxembourg, Moldova, Netherlands, Norway, Poland, Portugal, Romania, the Russian Federation, the Slovak Republic, Slovenia, Spain, Sweden, Switzerland, Turkey, Ukraine and the United Kingdom. There are five Associate member countries (Australia, Canada, Japan, New Zealand and the United States) and three Observer countries (Armenia, Liechtenstein and Morocco).

A Committee of Deputies, composed of senior civil servants representing Ministers, prepares proposals for consideration by the Council of Ministers. The Committee is assisted by working groups, each of which has a specific mandate.

The issues currently being studied – on which policy decisions by Ministers will be required – include the development and implementation of a pan-European transport policy; the integration of Central and Eastern European Countries into the European transport market; specific issues relating to transport by rail, road and waterway; combined transport; transport and the environment; the social costs of transport; trends in international transport and infrastructure needs; transport for people with mobility handicaps; road safety; traffic management; road traffic information and new communications technologies.

Statistical analyses of trends in traffic and investment are published regularly by the ECMT and provide a clear indication of the situation, on a trimestrial or annual basis, in the transport sector in different European countries.

As part of its research activities, the ECMT holds regular Symposia, Seminars and Round Tables on transport economics issues. Their conclusions are considered by the competent organs of the Conference under the authority of the Committee of Deputies and serve as a basis for formulating proposals for policy decisions to be submitted to Ministers.

The ECMT's Documentation Service has extensive information available concerning the transport sector. This information is accessible on the ECMT Internet site.

For administrative purposes the ECMT's Secretariat is attached to the Organisation for Economic Co-operation and Development (OECD).

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*Further information about the ECMT is available on Internet at the following address:*  
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GERMANY

**G. Wolfgang HEINZE**  
**Technische Universität Berlin**  
**Germany**





# TRANSPORT AND LEISURE: GROWTH AS OPPORTUNITY<sup>1</sup>

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Berlin, March 1998

## **1. THE CHALLENGE OF LEISURE AND HOLIDAY TRAFFIC**

### **1.1. Transport policy and planning are solving yesterday's problems**

Fixated on town centres and what is known as “necessary traffic” (as for work, education and shopping), transport policy scarcely notices that it is still solving yesterday's problems, with ever decreasing marginal utility. For today's problems are totally different:

- Our towns are spilling out into the environment, structuring themselves into new residential entities and mutating into a town-country association;
- The traditional Public transport (PT) has shrunk to a remnant. Taking people in a car goes in the statistics as Motorised Individual Transport (MIT). In reality, however, this “car passenger traffic” is increasingly taking over the system function of PT;
- On ever more stretches of road and rail links, the peak traffic periods are shifting to weekend and evening traffic. Despite this, the forecast figures for leisure and holiday traffic are irrelevant for the planning of German urban and regional transport;
- Transport is still seen as a technical matter, in which the focus is on the infrastructure (roads, tracks, stations), vehicles and their operation. The everyday reality of our transport system, however, shows that it is not the technical side that causes the major problems, but the service side: its closeness to customers, its linkages and framework conditions. Particularly in an industrialised society of growing anonymity, with the emphasis on technology and physical installations, people are attaching ever-increasing importance to experiences and emotional qualities.

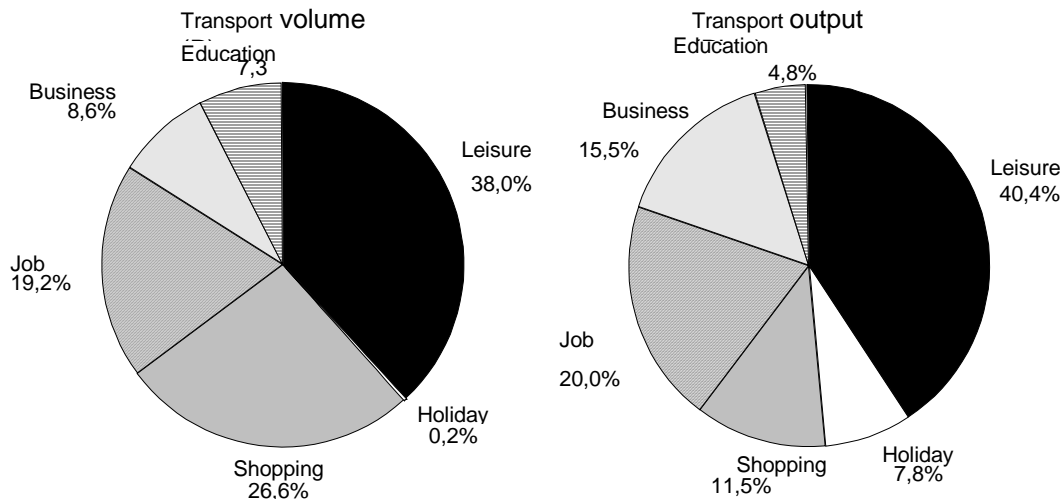
Leisure and holiday traffic is closely connected to these new challenges.

### **1.2. The biggest growth area is leisure and holiday traffic**

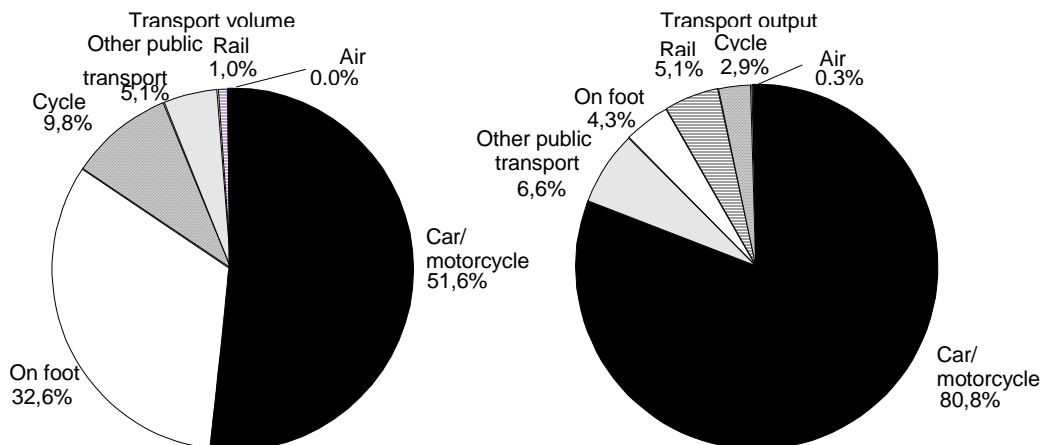
The big growth area in transport is what is known as “wish traffic”. This includes leisure traffic (trips of up to four days), holiday traffic (five and more days) and “buying experiences”. As the German transport statistics show, just under 40 per cent of all trips and 50 per cent of all person-kilometres (pkm) are in leisure and holiday traffic (Figure 1), and transport statisticians consider that because of its multifaceted nature this field is still systematically underestimated. What is more, these figures include only traffic within the national frontiers. Just a single holiday trip to the USA, the Caribbean or the Maldives is equivalent to the some 12 000 pkm a year (1994) that the average citizen covers within the country, and doubles the total. On top of this, there is the difficult-to-calculate but substantial goods traffic connected with the overall “leisure and tourism industry” (which the statisticians have not yet shown any interest in).

**Figure 1**      **Leisure and holiday traffic in transport statistics**

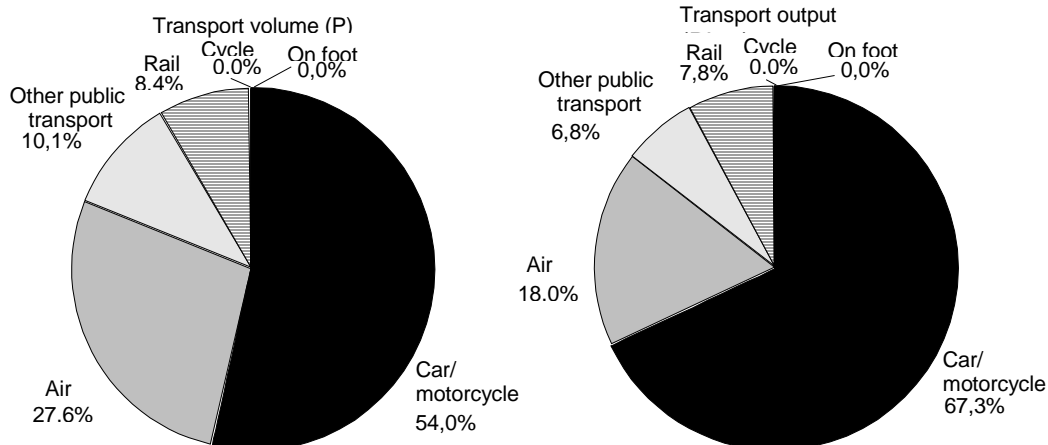
**Transport volume and transport output in passenger traffic according to trip purpose in Germany 1994 (%)**



**Modal split in leisure traffic in Germany 1994 (%)**



**Modal split in holiday traffic in Germany 1994 (%)**



Source: German Economic Research Institute, Feb. 1997.

Today, the car is the perfect transport mode for regional leisure mobility. Its shortcomings therefore lead to large-scale disamenities in leisure areas. Long-term forecasts for leisure and holiday traffic predict unbroken growth, even though for a high proportion of households there are signs of stagnating wages and a tendency for expenditure on consumer goods to fall. But there are large sections of the population with high investment incomes. In addition, in many big towns the proportion of single-person households is already 45 per cent. Even if the expenditure on leisure and holidays falls, for example, through people giving up family holidays lasting several weeks, leisure transport output is still likely to rise. Instead of a long journey by air (or even rail), the family will then make several excursion trips from home in their own car. So long as the car is not only faster but, even using full cost accounting, also cheaper than public transport, any decline in long-distance travel will benefit motorised individual transport (MIT) above all. This further strengthens the dominance of the car in leisure and holiday traffic and PT plays scarcely any role here any more.

### **1.3. The boundary between leisure and holiday traffic is becoming blurred**

Increasing travel distances are part of the far-reaching structural change in leisure and holiday traffics. Individualisation, package holidays and differentiated travel products have been setting the scene for some years now. Alongside the traditional holiday trips there are now short trips. Short breaks, spread over the whole year, are increasingly replacing the long family holiday. Travel times are becoming more flexible and the decision to take a trip more spontaneous. Environmental awareness is growing but, at the same time, people are seeking experiences, adventure and answers to the major present-day questions. Because our society is moving ever faster and the individual is ever more swamped with information, he strives in his leisure time to get a particular kick through new experiences or sports close to nature, or again seeks peace and quiet, relaxation and switching off.

For planners, leisure and holiday traffic in the sense of “tourism” still has an air of luxury. It tends to be designated “unnecessary (car) traffic”, which can therefore be first in line to be subjected to restrictive measures. But the all-pervading deep structural crisis favours leisure traffic, in that the differences between work and leisure are becoming ever more blurred and telecommunications are changing all aspects of our society and its spatial structures. The choice of transport mode for the traditional travel purposes is also becoming increasingly influenced by the preceding or following leisure activities.

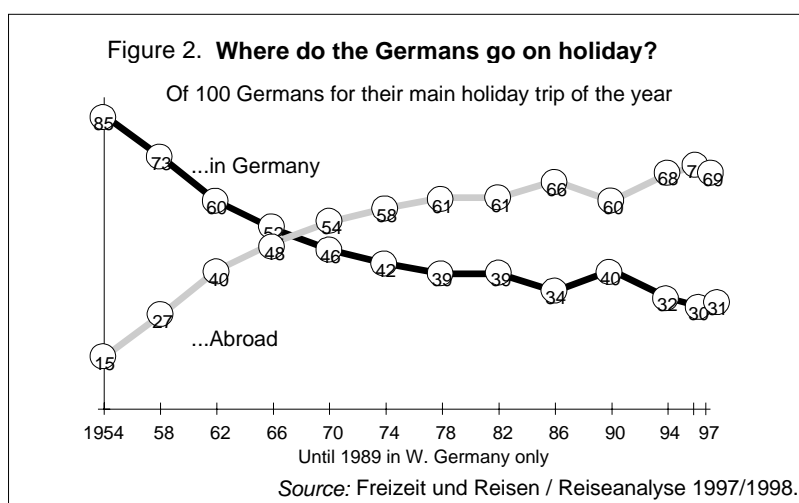
### **1.4. The “valiant little tailor” as the cult figure of globalisation**

Such trends as the growth of leisure and holiday traffic are manifestations of the dynamism, complexity and autonomy of powerful subsystems. They are directional processes that nobody is responsible for or in control of. They bring revolutionary and lasting changes and, in our century, originate mainly in the USA. Their power is such that they are real “megatrends”. It is when the direction they take starts to bother us that we realise that we cannot stand up to them. So we should not waste time complaining about these system trends, but instead regard the threat as an opportunity and use the trends’ own momentum to head them in the desired direction. This “ju-jitsu tactic” was also the principle behind the success of the “valiant little tailor” of the fairy tale: small and apparently weak, but resourceful and cheerful, he threw pebbles out of the tree at the giants, who blamed each other and finally killed one another. Our “giants” are the megatrends. Sober assessment of trends, identification of “critical points”, finding elegant ways out and implementing them with the aid of branches of the economy that can benefit: this is always the basic principle of successful planning.

Leisure traffic is thus, above all, to be understood as an opportunity. What is needed are fresh solutions which can create jobs in Germany and are capable of providing proposals that can be put into practice in the future in our leisure regions and offer the opportunity to train our students as tomorrow's actors in a responsible manner.

### 1.5. Jobs unaffected by crises in traditional tourist areas and new potentials

Looked at realistically, very few areas of central Europe are summer holiday destinations, nor can they compete with the sunshine, prices, service and charm of the people of southern European and overseas destinations. People seek a contrast to familiar surroundings, and the cheap flights and package deals offered by the big tour operators strengthen these marked preferences. While 85 per cent of Germans still spent their main holiday within the country in 1950, by 1997 this figure was down to 31 per cent (Figure 2). Foreign guests accounted for about 12 per cent of total overnight stays in 1997 (with a rising trend, but this includes business trips). The tourist industry as a whole in Germany is stagnating, with about 6-7 per cent of both jobs and value added in Gross Domestic Product. But since the overnight capacity in the hotel industry<sup>2</sup> has more than doubled in recent years, the capacity utilisation rate has fallen correspondingly (in the old *Bundesländer*, from 39 to 33 per cent and in the new, from 40 to 30 per cent over the period 1992-97). This picture, however -- like any average -- needs some refining. Popular places, such as Neuschwanstein, Rothenburg ob der Tauber, Oberammergau, the Rhine Valley, Berlin and Munich, will remain sought-after destinations. The number of foreign tourists is growing here and even leading to "over-visiting" of beauty spots. The North Sea and Baltic coasts and the Alpine skiing regions too are unlikely to lose their popularity as holiday destinations. The "problem child" for German tourism policy is the extensive low mountain region -- with its castles, fairy-tales, sagas and legends -- the holiday area of the 19th and early 20th centuries. Here lie most of the health resorts and spas which, with the health system reform, now find their turnovers falling by up to 50 per cent. Regions in a similar predicament are the heath and lakeland regions of North Germany. Solutions unaffected by crises for attracting people back to the traditional tourist areas are the challenge which forms the centre point of this paper. Our perspective reflects the German view, but should be of interest to other central and northern European countries.



Globalisation is nothing new, but only a continuation of the old interplay of “challenge and response”, a constant succession of innovations, market expansion and market contraction, of lifecycles of branches of industry, the rise and fall of leading products, a world-wide dynamic that we can only smooth out a little, not control. How can we again make a virtue out of necessity, if the holidaymakers follow each other abroad, if the growing dynamic of our lives favours shorter breaks and if, on top of this, the boundaries between work and leisure are becoming blurred?

## **2. TOWARDS A NEW STRATEGY FOR CENTRAL EUROPE**

### **2.1. Leisure traffic is particularly underestimated**

With attention still focused on long-holiday tourism, the importance of leisure traffic (as the sum of all short trips) is considerably underestimated. This is above all the result of incomplete information on its magnitude and its financial earning power for the tourist industry.

Thus the official German tourism statistics do not cover any small businesses with less than eight guest beds and hence neglect in many regions up to 50 per cent of the overnight stays. Also left out of account are the free overnights, as with friends and relatives or in the family's own second home.

It is generally agreed that the greater part of leisure time is associated with relatively little transport use. Only one-tenth of the total available time budget for leisure is used for holiday journeys and short breaks lasting several days. In the literature of the past twenty years, there is agreement that two-thirds to three-quarters of leisure time is spent at home or in the immediate vicinity. Some 20-30 per cent of leisure time is used for excursions and short breaks, which represents about thirty excursions per person per year. In 1986, the figure was still only twenty trips per person per year (Feige, 1996). The gaps in the official statistics for leisure trips without overnight stays are therefore found to be particularly annoying (an exception: DWIF Statistics, 1995). Experience has shown that there are about seven excursions for one overnight stay, but there are some regions with an average of ten and other regions with two excursions per overnight.

In big towns in particular, day visit traffic (excursions and day business trips) are of considerable economic importance: for 1986, it has been estimated that in Munich there were 33 million day visitors during the year, but only 6 million overnight stays (Koch, 1991: 114).

Because of its spontaneity and variability and the extensive nature of the destinations, transport planners consider leisure and holiday traffic to be the most difficult field, and the same applies within this field to day-trip traffic. Particularly problematical are day trips in areas in which the excursions of holidaymakers and the local population overlap. As a rule, the proportion of locals is underestimated. In a study of the Rosenheimer *Land*, it turned out that one-third of the excursion traffic was made up of long-stay guests (holidaymakers), one-third of locals and only one-third of day-trippers (above all from Munich) (Geißler, 1996). Since -- unlike in the case of long-stay holidaymakers -- fewer economic actors benefit from day-trippers, day excursions in many destination areas are leading to new, conflicting interests.

Regarding visitors' expenditure in the destination areas, a distinction needs to be made between day excursions, short trips with overnight stay and longer holidays. Even though the expenditure of excursionists is only in the order of 30-40 DM per person per day, their higher numbers can make up for the loss of income due to the decline in long-stay holidaymakers. In Rothenburg ob der Tauber in the mid-90s, each of the 2 million day-trippers spent an average of only 30 DM per day. Each of the 400 000 overnight guests, on the other hand, spent 100 DM per day in the town, but contributed only 40 per cent of the town's 100 million DM total income from tourism (Geinitz, 1996). In Usedom too, day-trippers are essential. They are seen as tomorrow's long-stay guests and, even with an expenditure of only 10-15 DM per day, make a contribution to the reconstruction of the new *Bundesländer*. Tourists who stayed overnight in Rügen in 1995 spent some 115 DM per day and day-trippers 30 DM (*Der Tagesspiegel*, Berlin, 29.10.1995). A considerably more favourable picture is seen in the case of cultural leisure activities. Of the 4 million overnight stays in Hamburg in 1996, 650 000 were accounted for by people who came to see the musicals *Cats* and *The Phantom of the Opera*. Music-lovers spend almost 200 million DM a year in Hamburg, with an average daily expenditure by art and culture tourists of some 305 DM (Rothärmel, 1996).

Even in the case of nature-oriented tourism, tourism managers need to know which target group to concentrate on: day-trippers and weekend visitors (as in the Schorfheide-Chorin Biosphere Reserve) or medium- and long-stay tourists (as in the Bavarian Forest National Park). This leads to the question as to how far the visitor numbers can be staggered at weekends and in the high season in order to protect the area. If the infrastructures of such an area are not capable of handling three times as many long-stay guests as inhabitants and then as many again day-trippers, then drinking water, sewerage systems, purification plants and refuse removal quickly become bottlenecks. The place of origin of the excursionists is also important for designing measures and for their political feasibility.

If the "down-market leisure traffic" could be shifted more into the periods before and after the high season, this could ease the peak periods and hence the need for overcapacities with their enormous resulting costs. Thus, in Schleswig-Holstein, the majority of all recorded overnight stays are concentrated in the three summer months and over 80 per cent in the summer half-year. On top of the recorded 17 million guest overnights, there are probably another 9 million who stay in private accommodation (Mohr, 1991).

## **2.2. "Leisure traffic" as a catch-up solution with a future**

Confronted with globalisation and cheap overseas package holidays by air, it would seem that central Europe should try to profit from the counter-movement: the renaissance of local and regional identification areas, i.e. attractive possibilities for leisure activities without having to go very far. This brings diversity, open spaces, the renaissance of public spaces and the risk of urban intensification generating escape traffic again into the centre of the discussion (and makes possible -- as will be shown -- a renewal of our living space).

If the market trend in central Europe is going in the direction of "more leisure traffic instead of tourism", this only indicates a further division of labour through globalisation. Instead of fighting against long-distance and more frequent trips, the answer would seem to be to concentrate more on regional advantages, culture and history, one-day and weekend tourism, short-break experience and urban tourism, second and third holidays and a new cultural tourism in Europe. In other words, concentrate on something that is already profitable in the short term, but can be further extended in



the longer term and whose repercussions can renew outmoded transport structures: “rest and recuperation” is above all a question of a change of scenery and minimum distance (C. Becker, 1997)<sup>3</sup>.

### **2.3. Does “more leisure traffic” have to mean even more traffic growth?**

Tourism can create new jobs in both town and country. Responsible transport policy, however, is something of a balancing act between easy accessibility for a leisure area and maintenance of its attractiveness. Because (almost) everything is a problem of numbers and a question of feedback, there is basically no such thing as an “ecological trip” and no “environment-friendly traffic”. It is therefore most environment-friendly to travel “less frequently, further and more intensively” (Halo Saibold). If we just take the German travel world, as it is now, the choice between leisure traffic and tourism finally means the choice between car and air travel. More leisure trips over shorter distances instead of journeys over longer distances need not produce more transport output. If the total distance per person per year remains the same, the environmental pollution can remain constant. Even though environmental pollution at ground level and in the stratosphere has different effects, in the meantime, the fuel consumption figures for aircraft and cars -- in the order of three litres per 100 pkm -- are coming much closer together. Then, even the CO<sub>2</sub> pollution of such a substitution would remain much the same. The best way out would certainly be a modal switch to the domestic railways which, with appropriate capacity utilisation of the ICE, has only a fraction of the above-mentioned average consumption values of car and air travel. Natural and cultural destinations are not hierarchically distributed over the country however. The flows of visitors to them would at first, in a consolidation phase, be again bundled in linear fashion, but then the dynamic groups involved in leisure and holiday traffic will already be on the way to new destination areas.

The leisure, excursion and tourism industry is, however, directly dependent on an intact environment and positive images and hence indirectly dependent on transport functions being performed in a way that is acceptable to the system. In the case of leisure traffic, therefore, there is a real chance that this problem will be approached in an innovative and co-operative way by all concerned.

### **2.4. Key elements of a new strategy**

The person responsible for damage caused by leisure and holiday traffic is the individual user, visitor and consumer. It is his individually rational behaviour which, in the mass, endangers the stability of the whole system. As a planner, our “valiant little tailor” would therefore promote such possibilities as are individually very attractive, but develop their strengths only through mass demand: for the goal is transport behaviour that is efficient and respects the environment, which is at the same time attractive and capable of forming a majority, through being fun, logically correct, ethically positive and aesthetically pleasing. Five factors suggest themselves as the keys to such a new strategy:

- Rediscovery of the local area;
- A new awareness of enjoying leisure in company;
- Movement-oriented activities;
- Reduced traffic;
- And last but not least, new elites as reference groups.

This combination of proximity, group, identity and diversity should both increase the importance of the non-motorised transport modes and lead to new, more efficient and more resolutely need-oriented PT. This new PT will therefore be expressly oriented towards matching car quality, but remain capable of carrying large numbers. A special PT for leisure traffic should be the exception, however. Because leisure traffic is diffuse, spontaneous and variable, it is considered the most difficult type of traffic: so a general-purpose PT, capable of handling leisure traffic, is good enough.

### **3. THE TOWN AS A LEISURE AREA**

#### **3.1. “Home” is still “in”**

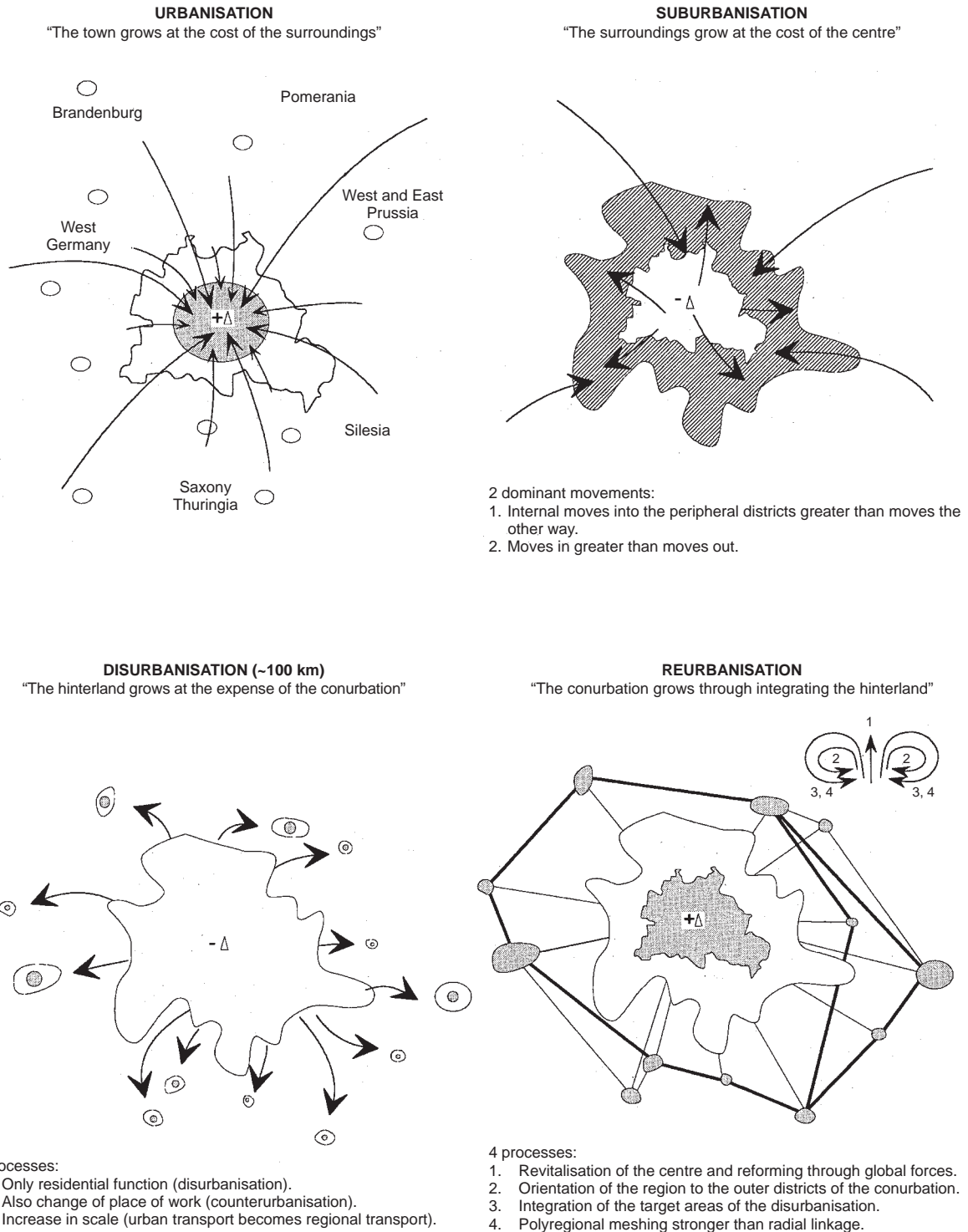
Globalisation is certainly changing the rules of the game and the instruments, but politics is firmly centred on the “home” and so are the majority of citizens. Despite all the prophecies of doom, the importance of land-use planning is increasing simply because of this. Because leisure and holiday traffic is growing so strongly and because it is so flexible and keen to experiment, it is here that there are the best chances for creative strategies. This is true above all for on-the-spot concepts, in order to avoid, to shift and to improve motorised traffic in the places of origin as well as in the leisure destinations. But the tried and tested avoidance and shifting strategies are still directed at work and shopping traffic.

As an industry with a future, past experience applies in the leisure and holiday field in a particular way: it is not the high costs for wages and social peace that should disturb a high-technology country so very much, but rather the lack of future-oriented solutions and products that others need and would like to buy off us. Europe should therefore develop programmes to contrast with America and Asia, dare to use imagination, create performance incentives, welcome unconventional ideas, encourage diversity, favour experiments, promote interdisciplinary teaching and research, spoil as little as possible, symbiotically integrate established suppliers and acknowledge pioneering efforts in all fields and at all levels, precisely because of the willingness to take risks. That is the message of this contribution to an organisation like the ECMT, which has espoused the cause of new markets, the need for research and the international exchange of experience.

#### **3.2. The disurbanisation and reurbanisation of our towns are stages on the way to town-country association. This favours a new leisure concept, a new transport policy and a new PT**

Towns too are subject to relatively independent development trends. The analysis of the four phases in the urban development cycle, as shown in Figure 3, is mainly attributable to the Dutchman, L. van den Berg (1982) and can be seen as one example of the great progress made in the knowledge of regional economic theory. Their consequences for transport planning and leisure traffic are far-reaching (Heinze, Kill, 1992). The central idea is a change of scale to the extensive town-country association, which fully includes the total area as residential, leisure or even evacuation space. Regional planning is becoming more important than a form of town planning restricted by municipal boundaries. Urban traffic is becoming regional traffic. Leisure is becoming regional tourism.

Figure 3. 4-phase pattern of the urban development cycle



Source: Heinze, Kill (1992).

In the urbanisation phase (in simple terms: the “boiled egg”), the expanding town with its new jobs sucks in population reserves from the surrounding area, grows and builds itself a PT network. In suburbanisation (the “fried egg”), the surrounding area grows because the centre has become full of problems. The classical big town appears with its radial-line PT (and MIT) network. In disurbanisation (the “scrambled egg”), the hinterland grows at the cost of the conurbation, above all because of the latter’s agglomeration disadvantages. This comes about with the aid of the full-coverage transport mode, the car. Lastly, in reurbanisation (the “omelette”), the conurbation revitalises the inner city, integrates the hinterland and leads, through an increase in scale, to the next cycle. While the “fried egg” could manage with radial centre-periphery connections, the “scrambled egg” and “omelette” in particular require cross-sectional links, rings, tangents, decentralisation and full-coverage transport.

Our town centres develop into “dolls’ houses” and open-air museums of historic buildings. The Central Business Districts are converted to Central Entertainment Areas. The more central residential areas are upgraded by better-off people (gentrification). High-density housing developments on the periphery of the town, on the other hand, cheaply built and with low-income inhabitants, become reception areas for foreign immigrants. Through sinking demand density of the growth rings on the periphery of the town, the town-country conflict comes into the town. The surrounding area and its centres of development become the big chance for shaping new structures. For, on the fringes of the big towns, shopping centres spring up together with large-scale leisure facilities, such as enormous theme parks, huge cinema complexes, discotheques, events halls, fun pools or multifunction leisure facilities. Parking space management in the town centres strengthens the attraction of these shopping centres with their enormous car parks.

The shopping and leisure capacities created here are so great that the demand from the town alone is not enough. The town-country association therefore presents itself as a symbiosis. As the respective medium and major centres have a sufficient population potential for leisure facilities in the surrounding area, so in the opposite direction, the higher number of inhabitants of the town-country association improves the profitability of concentrated facilities, which in addition have the best conditions of accessibility. Together, i.e. as culture and entertainment attractions with complementary relaxation functions, the regions can thus take their place in the ever-growing international urban tourism. In theory at least, these leisure flows also offer the possibility of reducing the imbalance in the traffic flows. How would it be if leisure traffic and urban tourism enabled our towns to function properly?

The disurbanising and reurbanising towns of the West are today mostly one to three phases ahead of those in eastern Europe. Towns like Berlin, which are now catching up on suburbanisation, need to know that their further heterogenisation is pre-programmed. How far this process has already extended is shown by the source and destination structure of transport flows. Whether in London, Hamburg or Berlin, almost 60 per cent of the transport operations in the big conurbations today are in the outer areas, and only about 20 per cent of the total traffic is on radial routes and thus suitable for rail transport (Kutter, 1995). Even if we cannot either substantially shorten or skip over individual phases, this does not mean that discernible ways out for the future of the system have to be foregone for now.

The decisive factor is therefore the point of view: leisure facilities are not only a disturbing factor that takes up space and creates traffic. If we want to meet the growing demands for self-determined ways of spending time, relaxing peace and quiet, creative space, access to the natural environment and safety through the security of the group and, at the same time, create jobs, then leisure facilities represent more of a unique opportunity to reshape urban and regional development<sup>4</sup>.

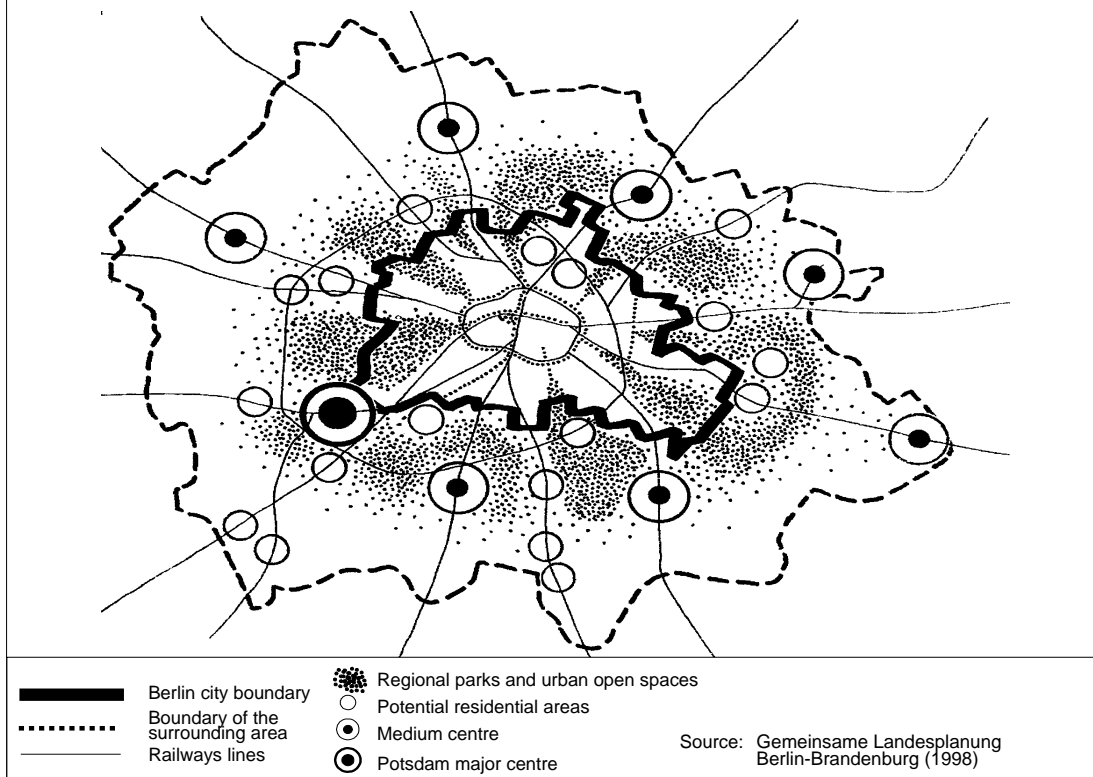
The dependency of these different land uses on one another facilitates integrated land-use planning. Thus, if they are arranged as mixed areas, linked by modern -- i.e. extensive-coverage and need-oriented -- PT services, and then provide jobs with a future (like telework-neighbourhood offices), the preconditions are satisfied for local identity building and independent development.

Land for experience-oriented leisure and shopping facilities should therefore be allocated only together with building land. Such communal uses facilitate capacity utilisation and make it possible to provide economically viable links to the city centre by means of efficient PT systems. The decisive advantage lies elsewhere, however: it is the opportunity to create, in this way, crystallisation nuclei to bring order to the chaos of housing estates resulting from suburbanisation, and to be able to do this independently of existing infrastructures (such as villages and industrial estates). Even industrial wastelands and disused transport land in the town area can be sensibly used in this way, for here the lack of motorway access is of no great importance any more. So “decentralised concentration” is far preferable to burdening a small historic town with such a reordering and relief function (and this against the will of the local population).

A classic example of this is the establishment of an extensive multifunction centre on the abandoned site of a former steelworks in the heart of a big west-German town. This recently opened “New Centre” in Oberhausen, known as *CentrO*, is a single-source supply. A big investor built here a shopping centre, leisure park, marina, big event hall, cinema complex, circus arena, hotels, restaurants and housing, as well as parking facilities. Local businesses, in particular small traders, were involved in the project. The local authorities cleared the land and provided PT connections.

Regional parks too are relevant here as open leisure zones and green belts around suburbanised towns. Beyond the limits of big towns and around their new relief centres, they can easily be reached on foot, by cycle or by PT. They permit the integration of existing villages, potential residential areas and transport infrastructures and can be used as “ventilation corridors” for the conurbations, above all if they are linked with the open spaces within the town (as is now being introduced in stages in Berlin-Brandenburg, Figure 4).

**Figure 4** Regional parks and urban open spaces in Berlin Brandenburg



### 3.3. Large leisure facilities are better than people say

Large scale facilities bring people together and constitute focal points. They thus help keep other places free. The frequently heard fear that the villages on the way to these facilities would be buried under an avalanche of traffic is not justified either empirically or in planning terms. All existing large-scale facilities in Germany, accessed by thousands of cars in the space of a few hours, have direct motorway access. What is more, this high volume of traffic occurs only a few times a year. The additional traffic burden due to most facilities is more in the order of a few hundred cars per hour per road. From the traffic management standpoint, the substantial percentage increase in traffic volumes on the access roads for the most part remain within the capacity limits of the roads concerned, even on the main holiday departure and return days. In absolute figures too, this traffic to and from facilities does not approach that of transit traffic on links between axes in country areas.

A modal switch to public transport (PT) would appear possible with improved supply, for these facilities are visited by many people, to some extent at the same time. A counter argument, however, is that in leisure traffic in particular there are relatively fixed transport habits that clearly favour the car. Nevertheless, an improvement in public transport is one way to achieve a modal switch. To achieve this, however, in addition to an enhanced public transport supply, what is necessary above all is organisational measures, such as full service packages (rail travel with overnight stay and transfers

included) or at least combined tickets. For many big events, already today the price includes travel there and back by PT. Discotheques, in particular, raise an additional charge with the entry fee to finance a shuttle bus service.

The new generation large-scale leisure facilities are characterised by openness and integration. Leisure as mass consumption favours their industrialisation, and large leisure facilities are only a continuation of the concept of shopping centres and specialised markets which also came from the USA thirty years ago. Such facilities provide a supply for hybrid consumers who are seeking a mix of experiences and functionality. Diversity is therefore important.

For the representatives of regional public interests, the sheer size of the facilities is no longer decisive. The most important factors today are the multifaceted nature of the overall facility, its open structure and its economic linkage with local communities and their business profiles. Thus, large-scale facilities should not be equipped for day-trippers only, but also at least for weekend stays. The built-on surfaces should be in areas where they do no harm. Particular attention should be paid to economic viability, through authorising only a limited number of large facilities with good accessibility. This means that their location is not vitally important. If day-trippers still come, then they should be able to use the train and well connected transport infrastructures. Particularly advantageous is the combination of rail travel and shuttle buses included in the price of the ticket.

Large-scale leisure facilities are better than people say. But they have to offer diversity and correspond closely to the customer profile in the narrower catchment area. They therefore belong in the centre and on the edge of the population centre, but not so much in the periphery. In land-use policy-oriented tourism planning today, there is a similar trend to that observed in the industrial location policy of the 70s: now it is leisure facilities close to existing transport system capacity reserves that should be promoted, and this fairly independently of the tourism strategy pursued. But investment in the tourist industry makes sense only if there is a demand for the product concerned (otherwise the banks won't play along). If there is to be an effective demand, people (and the necessary resources) have to be transported to these facilities. This brings us back to our problem: leisure and holiday traffic.

It is a fascinating idea to operate a traditional tourism region as a large-scale open leisure facility. The "Planet Harz" Project embraces the Ostharz from Blankenburg to Wernigerode and Quedlinburg. This experience landscape includes all facilities, as is characteristic of modern, large-scale complexes (i.e. hotels, holiday houses, golf links and tennis courts, fun pools, riding schools, playgrounds and shooting ranges, but also bungee-jumping and winter sports of all types, thermal springs and fitness centres, bio-farms and children's worlds, restaurants, shopping centres, discos, music theatre, fantasy worlds, workshops and exhibitions). Seven factors have contributed to the creation of this kind of phenomenon:

1. These new centres are embedded in existing historic structures consisting of independent, small and medium enterprises;
2. Top destinations are used as effective advertising (world cultural heritage, castle hotels, the Brocken as the magic mountain of German literature, natural parks, ensembles of period buildings, route of the Romantics, limestone caves with stalactites and stalagmites, narrow-gauge railways, rafting) and are enhanced thanks to the demand of clients with money to spend and are presented in keeping with the period;

3. The supply is very diverse, in order to be able to cater for different interests and different lengths of stay. This diversity should, in fact, exist right from the beginning if there is no possibility of incorporating the tourism supply of attractive towns or established resorts;
4. There is year-round operation with all-weather programmes;
5. The magic of old cultural regions, their fairy tales, sagas, history and poetry -- like Goethe's "Faust" -- is deliberately used as the *genius loci* (for example, exhibitions of rites and magic, meditations or the musical "Hexy" with special effects, produced by a several-times Grammy and Oscar winner);
6. The organisation is based on a full-service, short-trip concept. In order to keep the ecological disturbance to a minimum, it is necessary to have environment-friendly transport to the sites and an association of environment-friendly local transport modes (like footpaths, cycle paths, PT). A popular PT should form the core of this association;
7. A transregional marketing strategy in travel agencies should lure away certain foreign package-tour clients, and informal groups (such as firms and associations organising conferences, symposia and reward trips) should be appropriately targeted.

"Planet Harz" is a 500 million DM investment project, to be opened on 30 June 1999. This concept in a new *Bundesland* should serve as a pilot scheme for the west-German low mountain regions. Such a complex, however, implies a high level of demand in order to achieve adequate capacity utilisation of this diversified supply.

### **3.4. The more motorised "necessary traffic" is avoided, the more "wish traffic" appears. Therefore human improvements in the living environment come first**

Over 90 per cent of all transport operations (persons carried, trips) take place within a distance of 50 km. Urban local transport systems have therefore reached their capacity limits. The long-distance transport systems, on the other hand, still have reserve capacities, but most long trips begin and end somewhere in towns and there become local traffic. Furthermore, the greater part of leisure time is spent at home and the most frequent leisure activities take place in the local area<sup>5</sup>. In a prosperous society, pushing and pulling in the direction of "broad growth", we should therefore concentrate on short-distance leisure traffic and make the best of long-distance tourism.

According to the escape theory, leisure mobility is essentially an attempt to compensate for the deteriorated psychological and social quality of life. Here, it is a matter of seeking real greenery, natural light and open spaces but is, in particular, a reaction to being unable to satisfy the need for "particularity" and "a sense of belonging with other people and social communities":

1. The individual must have the possibility of arranging his home and surroundings to suit his personality;
2. The individual must be free to either withdraw into his own space or meet with others;
3. The individual must be able to regulate his equilibrium by satisfying his needs: for security, for stimulation and for personal independence.



Building on this, the Bern study by Fuhrer, Kaiser and Steiner (1993) stressed in particular six deficiency factors in the field of housing which produce compensatory leisure mobility:

- (1) *The security effect:* People who feel safe and secure at home leave it less, above all at weekends. *“Those who feel safe (at home) are above all: the elderly, married women who grew up in the district, who in addition to the living rooms have additional space (hobby room, etc.), their own garden and balcony, in a fairly large old house with not many storeys, far from the centre, people who own their own house or flat and find the house rules liberal (ibid: 82).”*
- (2) *The traffic effect:* People who live on busy roads cover the greatest distances in leisure time and at weekends and thus create traffic for others.
- (3) *The garden effect.* People who *“cannot shape the space between the buildings (such as garden, lawn, balcony) prefer to drive the car a long way. The car replaces the lost or lacking own space (ibid: 83).”*
- (4) *The storey effect:* People who live high up, above all in blocks of flats and tower blocks, are mobile in order to be “close to the ground” in leisure times and at weekends.
- (5) *The rendezvous effect:* People who get away in their leisure time want above all to meet others. This applies for 60 per cent of all activities that require leisure mobility. The less roads act as social barriers due to the volume of traffic, the more frequently social contact can be made in the home district.
- (6) *The car-living room effect:* The more the car is able to offer qualities that are missing at home -- like power, control and self-assertion -- the higher the leisure mobility. The car thus replaces the home and results in *“leisure mobility in the form of multi-location living (ibid: 79).”*

This results in six basic rules for building:

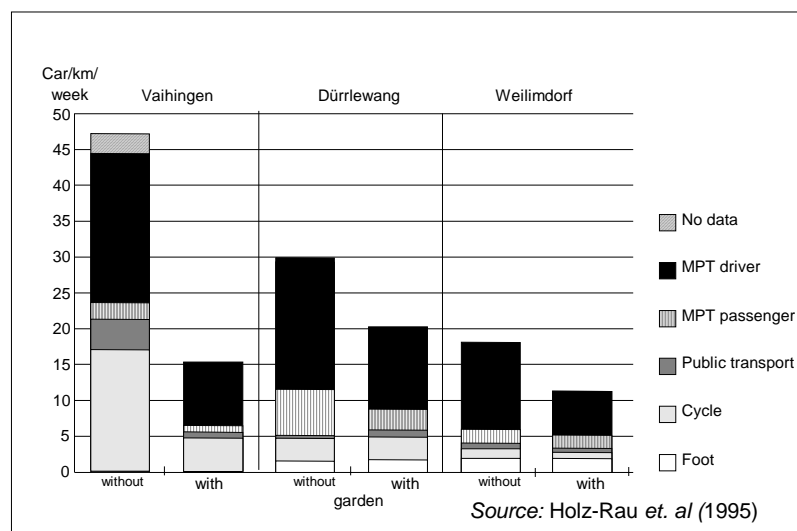
1. Build diversity instead of standard dwellings;
2. If the housing is conventional, then it should be built to allow individuality to be expressed;
3. Plan and build only together with the future residents;
4. Create transition spaces between inside and outside, so that the space outside becomes part of the inside;
5. Leave the finishings to the choice of the residents so that they can adapt them to their lifestyle;
6. Create a personalised, alterable and cultivable space in public transport facilities too (so that public transport takes on the image of a place to escape to).

This view, based on the psychology of living conditions, is being increasingly called into question. The more recent survey findings on reasons for mass leisure mobility (Opaschowski, 1995a) are particularly interesting here, especially regarding the differences between the men and women questioned: women tend more to want to escape from the everyday routine and get out in the fresh air, while for men the main factors are the urge to move, the greater need for activity and a breath of freedom. If these findings can be generalised, they show interesting ways out for a new regional transport policy. *“The results of the survey lead to the conclusion that: behind men’s need*

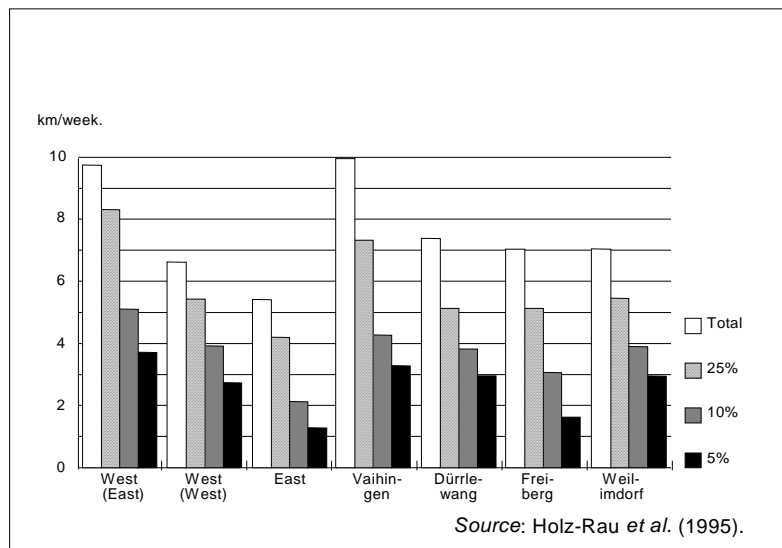
for mobility there really lies an urge for physical movement and activity that could be equally well satisfied in the open air through sport, rambling and walking. Provided that the feeling of expanse is guaranteed, a breath of freedom can be obtained -- for example through walking in a large park in the town with more distant views, playing on the golf links or sailing on a large lake. Where this is not possible in the immediate vicinity, motorised mobility often develops into a substitute for physical activity in the case of men. Many men are perhaps in their heart of hearts still hunters or cowboys, riding through the broad prairies and driving the game or the cattle before them. If there are no horses or cattle around, then the car will do... . Women, on the other hand, seek through mobility more the contrast to everyday life, quite different scenery and a change of air. Here it is less a case of physical challenges as of refuelling and taking a deep breath, in order to change roles and feelings, to experience something out of the ordinary. The mere change of place through mobility is sometimes enough to provide these subjective impressions (ibid: 21, 22)."

The importance of living conditions and lifestyle is to be seen in a fairly recent study of districts of Stuttgart (Holz-Rau *et al.*, 1995). Even though in all areas the average frequency of regularly performed leisure activities was the same, the leisure distance for gainfully employed people with a car and a garden is significantly lower than for comparable groups without their own garden (Figure 5). This also applies in the case of pensioners. This traffic-avoidance effect of privately available open spaces, however, permits only the interpretation that the living situations (with or without garden) and the leisure activities pursued reflect the view of life. Some people like to spend more of their leisure at home and in the garden, while others prefer a more travel-intensive lifestyle. How sharply people can differ in their leisure is very clearly shown by the contribution of particularly car-happy sections of the population to the kilometres covered in motorised individual transport. In the western part of the Stuttgart survey area, for example, one-third of the weekly leisure kilometres are accounted for by only 5 per cent of the population, half the weekly leisure kilometres by only 10 per cent of the population and over 80 per cent of the weekly leisure kilometres by only 25 per cent of the population (Figure 6). The authors thus deduce that there is a substantial potential for traffic avoidance if it is possible to change the behaviour of these minorities.

Figure 5. Leisure distances for employed people with cars according to garden ownership



**Figure 6. Contribution of people over 16 with particularly transport-intensive leisure behaviour to total motorised private vehicle leisure traffic**



The kind of lifestyle says nothing, however, about the chance of introducing a different lifestyle. As most dreams shatter in the face of reality, deficiencies in the “home area” certainly encourage leisure mobility needs. This kind of latent demand becomes a necessity with actual market effects only if there is sufficient purchasing power, if the expected prices are known. Thus deficiencies in the living environment provide necessary, but not sufficient, explanations. The main engine of leisure and holiday traffic, however, is mass prosperity and the associated societal framework (values, views of life, division of labour, education, communication, working hours, occupational stress).

### 3.5. As the quality of life in our towns rises, so does their tourism value

The main transport policy effort for the immediate future should be aimed at shorter trip distances through more attractive regions (town-country association) with networked physical transport. This includes new jobs and their traffic-relieving comprehensive integration into multimedia telecommunications. It includes a truly attractive PT. It also includes revitalised public spaces, open space systems and as much unmotorised leisure traffic as possible in our towns. Regional and local businesses in leisure areas can help mitigate physical traffic growth through developing a specific identity and by channelling leisure demand into large-scale facilities near to conurbations. Above all, we must “build nests” for people again, as the town planner, Klaus Humpert, puts it. In other words: because leisure and holiday mobility satisfy phylogenetically-determined archetypal needs, we should do the one and not forget the other.

In our urban areas too, reality is showing much more imagination than many planners. Thus, inner-city green spaces can be used for golf practice without the usually associated transport, slag heaps become downhill-biking runs, quarries serve as climbing areas and replanted gravel pits are transformed into bathing lakes. Just how important such local solutions can be is shown by a study from Switzerland (J. Stettler, 1998). In this study of over 60 types of sport, the sport-motivated transport output was estimated at 12 billion pkm a year. This corresponds to 12 per cent of total passenger traffic and 24 per cent of leisure traffic. The transport process involved is so complex and

dynamic that it is scarcely possible to get an overview, let alone directly control it. The need to set different framework conditions is therefore becoming ever more obvious (Kaspar, 1998). If the transport planner does not want to remain society's scapegoat, then he must take more interest in the socioeconomic framework conditions of his activity: on the job and in conversation with personal contacts, with humour and without fundamentalist asceticism. For example this high volume of sports traffic heads not only for the commercial sports facilities on the outskirts of the town, in the commercial and industrial areas, but to the open country, and the trend is now towards sports centres with extensive catchment areas. This process will be strengthened through the taking over of inner-city open spaces for new buildings, through haphazard increases in the density of originally low-density residential areas, through thoughtless privatisation of every piece of public property, through the dictatorship of the caretakers in the use of gymnasiums and school yards outside school hours and through the deafness of non-profit sports clubs to the pleas of young people who would like to use their grounds and halls without being members. Why not use small unused park areas in the town for sports activities for all age groups without club membership cards and have "the community" or a patron provide only for hedges and lighting. Lastly, sport is the most important contribution to the general health of the population, and the reduction of juvenile delinquency a contribution to the attractiveness of urban tourism destinations.

The allotment idea, originated by the Leipzig orthopaedist, Dr. Schreber (1808-1861), was above all a family policy concept in order to give working class families the possibility of spending leisure time together in the open air, to ease the household budget by growing their own vegetables and keep the fathers out of the pubs. The idea received considerable support from the German empress. Today, with high incomes, own cars and interest in health, allotments relieve the regional transport system and the environment and also support the ventilation of the town. As in the case of publicly-owned housing, we only need to ensure that families with children have preference for renting allotments; therefore, mothers and fathers should be elected to leading positions in the associations running them. The use of the Berlin *Tiergarten*, an extensive city park, by Turkish families, who barbecue, talk and play there at the weekends, is therefore only a modern variant of Dr. Schreber's intention. People come together, ethnic tensions are defused, a passer-by can be offered a kebab, the park is becoming a safer place and people stay in the town. To prohibit barbecues here, as is constantly being threatened, is therefore also bad transport policy.

Smart ideas and a bit of sovereignty pay off: the replica of the *Stadtschloß* in Berlin and the wrapping of the *Reichstag* were the quintessence of new, successful cultural destinations. Why no emulation then, if they were so good, for example, the Wartburg or the Nürnberg Altstadt? Large-scale tourist facilities can also be attractive, such as Neuschwanstein, Carcassonne, Sanssouci or the Olympic site in Berlin. In Oberammergau, in Rothenburg ob der Tauber, in Heligoland and on cruise ships, even the populations belong to the scenery. Lastly, in Heidelberg, a hotel tries to attract attention with the commemorative plaque "Here Goethe could almost have spent the night".

Much of the heat goes out of the debate over the large-scale leisure facilities of our time if we look beneath the patina of historic sights. Was the opera house for Richard Wagner in Bayreuth any different in principle from the music theatre for Lloyd Webber? Can big event halls really not be compared with the *Sportpalast* in Berlin? Were the zoological and botanical gardens of the turn of the century not primarily leisure and experience parks? Does the wave of seaside resorts, winter sports resorts, cabins, construction, camping sites and lookout towers on every hill of any size not lead to the leisure parks of today, and open-air stages and amphitheatres to the big cinema complexes of today? Only the social stratification has changed, every place advertises itself as a leisure destination and the demand is more demanding and much more mobile.

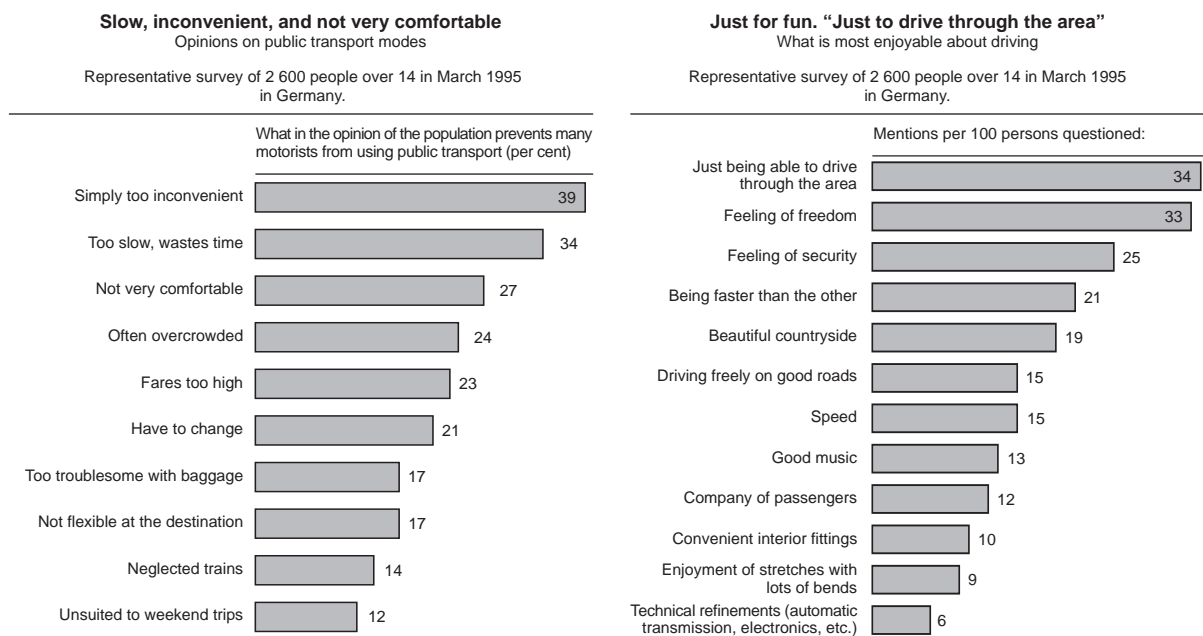
The “west European town” is something special and therefore a destination for urban tourism. It is characterised above all by seven elements: its individuality, the quality of its old historic centre, the mix of functions in the present centre, its public spaces, its historical shaping through pedestrians and public transport lines, its marked compactness, the remarkable homogeneity of its population and the social mixing of its districts (Holzner, 1992). The preservation of these towns therefore requires: polycentrality and efficient rail links, short trips and their global integration through telecommunications, the rediscovery of the neighbourhood, the group and the bicycle and a new form of suburb and neighbourhood transport.

## 4. THE CHALLENGE FOR PUBLIC TRANSPORT (PT)

### 4.1. Above all, PT has to make itself popular

The strategy “More leisure traffic instead of tourism” necessarily implies the renewal of PT. At the same time, this helps to slow traffic growth and accelerate town-country association. In order to check the growth of private car traffic, PT must become popular, for in the longer term only a popular and hence also politically accepted PT can be financially viable. However, public transport can be popular only if people are happy to travel together with others, if this behaviour corresponds to the spirit of the age and if the public transport supply does not suffer too much in comparison with car quality. Some present opinions on the quality comparison in leisure and holiday traffic are shown in Figure 7.

Figure 7. Opinions on public transport modes and the car



Source: BAT Leisure Research Institute 1995 (Opaschowski, 1995, pp. 26 and 28).

Dazzled by its size, power and unity, traditional PT has forgotten its origins. When it began its growth phase in the product life cycle it was a small tramway with driver and conductor, which stopped on request and which not everyone could afford. At that time, the community obligation of the line concession was the service required in return for the stretch monopoly and hence a kind of early consumer protection. Today, it is a matter of frozen assets and subsidies. At that time -- the middle of the last century -- PT was the epitome of an innovative product -- but for the towns of that time, with the numbers, the transport system and the framework conditions of that time. As time went on, however, because it did not have to adapt itself economically to the changes in our societal and urban structures, it developed no real alternative to the car. No longer equal to the changed demands of a prosperous car-owning society in the town-country association, the traditional demand for traditional PT is stagnating or escaping into new manifestations. This is clear above in growth markets, such as leisure and holiday traffic.

In view of its inherited capital intensity and its shackles of public service law, traditional PT is inclined to deny any conflict, defining itself as a timeless optimal system: as a system of hierarchical scheduled services over centre-periphery links, “operational values” (like timetable and lines), big vehicles and protection dominate. Since this product cannot cover its costs in today’s towns -- to say nothing of the less densely-populated areas -- “market”, “competition” and “marketing” are dirty words. Because of the “politically no longer controllable operating cost deficit” (as Baden-Württemberg Interior Minister Schäuble put it in 1992), urban development and society, instead of demanding more of the transport system, have to adjust to the inherited system and its existing routes. This standard formula is mistaken logic *par excellence*.

If PT does not want to remain a drip-tray in a car-society, it will have to make more effort in its own market segment and in growth markets. But the future markets for PT are no longer the captive clients in work and education traffic on the radial links between centre and periphery, but leisure, shopping and holiday traffic, diagonal, ring and tangent traffic, and suburb and district traffic. Leisure traffic is not only diffuse, spontaneous and variable, but also implies the capacity to carry very large numbers in a very short time. It is not only the biggest market segment, but also the renewal potential for PT; for, precisely because of its degree of difficulty, a PT capable of handling leisure traffic is also good enough for the other travel purposes.

It is therefore particularly in the tourism and excursion fields that a great diversity of new, unconventional forms of public transport can develop as an alternative to MIT. We only have to think of ski buses, lifts and cableways. Here, these new forms of transport find the initial field of action that they need to encourage the later, more widespread use of such systems.

#### **4.2. If PT can handle leisure traffic, then we also have the solution to other transport problems in our conurbations**

The main starting points for planners in the leisure traffic field have hitherto been the optimisation of traffic flows, the shifting of parts of MIT to more environment-friendly transport modes, the networking of carriers and the further technical development of vehicles and infrastructures. A new addition is now the requirement for transport avoidance in the narrower sense. Here it is becoming clear just how overdue a “new PT” is in leisure traffic. A further step: a PT that can handle leisure traffic also solves other transport problems in our conurbations. It is precisely

leisure traffic which offers solutions for PT in the thinly-populated peripheral areas of the conurbations, which -- even though they are preferred destinations for leisure traffic -- cannot be economically served at present with the existing forms and operating methods of PT.

This applies in a particular way for small town “relief centres” in the surrounding area and for the worrying polarisation of country areas. Around conurbations, country areas developed somewhat in the direction of the park landscapes of South-East England. In the large, thinly-populated areas of North-East Germany, on the other hand, we find broad natural landscapes with many very small villages, whose residual population has a disproportionately high proportion of social cost-intensive elderly people. In 1996, 64 per cent of the local communities in Brandenburg, with only 12 per cent of the total population, were villages of up to 500 inhabitants (*Statistisches Bundesamt*, 1997). In the districts of Brandenburg bordering Berlin an invisible line is becoming clear: 200 inhabitants/km<sup>2</sup> in the vicinity of Berlin and 40 inhabitants/km<sup>2</sup> further out, with a falling trend. But when the population density falls to 35 inhabitants/km<sup>2</sup> the infrastructure becomes prohibitively expensive (as Chief Administrative Officer Schröter of Overhavel District put it in 1998).

Given the possibilities opened up by telecommunications, the spatial integration of places of work, living and recreation is probable, above all in the medium and longer terms. This results in a high development potential for places with attractive landscapes. Linked by information technology, these developments could again create the necessary demand for public transport services. Whether we like it or not, the vital question for PT policy in the thinly-populated areas today is: whether to remain a residual value in a car society or to take up the challenge and, with the aid of technical progress, dare to guarantee mobility for all -- with an easily accessible, easy to understand and thoroughly affordable transport supply round the clock, forming an integrated whole, with which people are happy to identify. Here it is not a case of competing with the family's first car, but “only” of bundling together the existing residual mobility of all types, tapping new growth fields (like leisure traffic and package services), creating links (such as feeder and distribution services for major transport axes) and adopting the approach of the customer-oriented private sector businessman, not simply talking about new ideas.

#### **4.3. What is wanted, and what has long existed in niche markets, is a “New PT”**

What is wanted, and what has long existed in niche markets, is a “new PT”. PT is becoming more like MIT, as shown by the increasing use of minibuses, demand-responsive buses, collective taxis and social community car services. MIT, in turn, is becoming increasingly capable of being used for PT. This begins with the spacious car (van) and hire cars and leads through car sharing, car pooling, mobility centres (as integration of car-passenger centre, travel agency, car hire and taxi centre) and electronic guidance and control systems, to the train-forming capability of the latest vehicles. The renewal of PT thus comes from the “car” direction. There are therefore numerous examples to show the way a leisure-oriented transport policy should go: experimental cars, involvement of established suppliers and use of technical progress (for example, the use of satellite navigation systems, such as GPS by Volkswagen AG in the Leer District) to be able to provide a broad-coverage, small bus service with taxi quality and moderate prices.

Thanks to the combination of private and public vehicles under the umbrella of a decentralised but unified organisation, a “new PT” should be able to emerge from today's public transport: through far-reaching changes in its forms, through corresponding to the quality of life of prosperous citizens with the most varied lifestyles, made attractive through the growing diversity of its system elements,

integrated through people and microelectronics, accepted through its independence of timetables, financed through demand-oriented operation, in accordance with the system through decentralised decision processes, through removal of its dependence on community and state in the form of a “new community obligation”, in that the aim is no longer equality of tariffs in the area covered but equality of social and ecological costs. This can also be achieved with private ownership.

All this leads to a completely changed conception of itself for today’s PT: away from the supply-side behaviour of an anonymous transport operator to the popular supply of mobility and accessibility, the introduction of full service transport supply for the client, with the performance of logistics tasks for private households.

Against this background, the advertising for the new public transport must stress the positive aspects of this new form (and not denigrate the car). It must also promote the customer (“Nice people use the call bus”), create group solidarity (“Together instead of alone”) and stress alternative enjoyment of leisure (“In my free time I let someone drive me or I take the bike”). Above all, the advertising for the new PT must shake off the image of being the transport mode for the not-much-fun travel purposes of “work, school, military service” and aggressively target leisure. This includes carrying leisure equipment such as cycles and surfboards. In finding the solution to these interface problems, we can learn above all from the winter sports resorts and their ski buses. If the enjoyment of leisure time is to begin with the trip, then lockers for baggage not needed on the journey and the sale of food and drink in or at the vehicle make it more attractive. A dynamic, high-quality, exclusive supply should therefore not be cheap. A new PT should be a high-price product and, through quality and price differentiation, leave the field of essential services to the traditional PT. Thus, here again, it is a case of doing the one and not forgetting the other. If -- as Hilgers (1995) points out -- leisure traffic is used to compensate for social inferiority, the advertising for the new PT, cycling and walking should associate these modes with strength, a winner image and independence.

An environmentally acceptable organisation of car traffic in and to tourist areas is important, but the real key to transport design for the sustainable development of tourism in a region is the possibility of an individualised combination of environment-friendly modes (walking, cycling, PT). Its central component must be a “new PT”.

This PT has to perform three tasks:

1. Connection with long-distance transport nodes;
2. Shuttle operation between major traffic nodes; and
3. Extensive coverage to serve peripheral places and stops for visitors and residents.

Of particular importance is the solution of interface problems between cycle and PT (cycle hire points, cheap carriage in trains and buses), the reversal of traffic flows at certain times of day and baggage problems.

Such a concept involves very serious conflicts of interest and difficulties of implementation. Such concepts are intended above all for tourists, but the political decision is made by local residents. The locals must therefore be given preference for car use. Any hint that tourists are reduced to second-class (transport) citizens can be countered by the provision of high-quality PT, secure long-term parking, low parking fees and low-price or free PT use for the period of the stay.



Figure 8. **Examples of reorientation of the public transport modes in leisure traffic**

- Enhanced flexibility of LPT with respect to demand peaks and weather-dependency: through small units, short regular intervals, demand-responsive service, flexible routes (departure when the vehicle is full; fast, comfortable, cheap; door-to-door service).
- Smart solutions for overcoming the suppressed awareness of the available LPT supply: buses and stops painted in shocking colours or zebra stripes. Times of passage in big letters on the outside wall. Timetables for specific stops in cheque-card format to go in the wallet. Distribution through social multipliers (pubs and restaurants, associations, shops, churches, hotels, local politicians).
- Incentives for friendly bus drivers; ban on the use of graffiti-defaced vehicles. Simple, immediate removal possible by means of a biodegradable protective film, as used in Helsingborg, Sweden. Immediate removal of rubbish in vehicles, bus stops and railway stations (as in London).
- Stowage space for sports equipment in LPT excursion vehicles; baggage service; new operating systems in LPT (demand-orientation and extensive LPT coverage); possibility of taking cycles on the bus.
- Promotion of new types of LPT (maxi-taxis, minibuses, shuttle service, valley buses), electric taxis (Bad Griesbach plan), electric buses (Mauterndorf), horse-drawn taxis for day trips (Thülsfeld Dam in Kreis Cloppenburg); district-oriented collective taxis/minibuses at stations (as with DB AG in large towns), airports, markets, etc.; introduction of express bus lines with request stops.
- Mobility advice and centres in tourism offices; taxi call centres in parking stations and bus stations with 24-hour service; win over the automotive industry for pilot projects (call bus project in Leer); metal channels for cycles in metro systems accessed by steps, as at the Eiserner Steg in Frankfurt/M. Use of the local potential for new ideas, such as setting up a 'public transport' working party in the adult education centre or putting suggestion boxes in LPT vehicles.
- Creation of emission-free valleys as "branded goods" and events [valley bus in Lungau, Austria, in the summer season since 1989 through E. Hocevar (Tamsweg)]: integration of 66 km of narrow-gauge railway with simplified operation; small, regular-interval buses (some all-wheel drive); request trips; cableways; a "chu-chu-train" tractor train; electric buses and golf buggies or "Sunnybus"; timetable and transport association with common daily and weekly tickets; road tolls; strictly limited traffic in protected areas; marketing concept and co-operation with national parks and nature reserves in the region.
- Revival of historic transport for tourism purposes (such as the cable-car in San Francisco; steam and narrow-gauge railways; raft trips on the Isar; the planned Lüneburg to Wismar stagecoach link from inn to inn, with coachmen, landlords and guests in Biedermeier costumes).
- Supply of a "mobile holidays without the car" information package, that integrates low fares, baggage collection service, LPT, interconnection possibilities, etc.
- Better co-ordination of LPT in tourism regions with long-distance connections. Perceptible reward for doing without the car during the holiday, for example, free or reduced price LPT tickets, hire car, mobile telephone, sports equipment or cycles for the length of the stay, in the case of arrival by public transport.
- Introduction of express bus lines.
- Increased possibilities for information about public transport leisure traffic supply and online transmission to the potential user in the simplest possible way, even in the holiday accommodation.
- Integration of the journey to the holiday place with futuristic LPT to leisure facilities (as with the magnetic levitation train link with Disneyland in Orlando, Florida).
- Remote-controlled electric cars with interactive multimedia information to give access to big parks (as in the film Jurassic Park).
- Parking areas on the periphery of the destination resort or area, with connections to public transport and perceptible fines for unauthorised parking.
- Marketing of all types of public transport modes as part of the overall tourism supply of a region through a period ticket (such as the *Kämten* card which, for about 50 DM, gives unrestricted access to over 60 excursion destinations and free use of all mountain railways, ferries and all LPT for a period of 3 weeks). Sale of such local and regional tickets through travel agencies in source areas, not only on the spot.

The negative effects of motorised road traffic can be reduced, not only through restrictive measures, but also through “intelligent” traffic control, through low-emission vehicles, through advanced logistics concepts and through better information for road users. Projects concentrated on small areas which strengthen PT and non-motorised transport can substantially reduce local car traffic and its harmful effects for tourist resorts and regions. Various examples of the reorientation of public transport in leisure traffic are presented in Figure 8.

## **5. DRIVING PLEASURE AS OPPORTUNITY**

### **5.1. Intrinsic motives and purpose mobility are pre-eminent in leisure**

A transport mode is popular if people are happy to use it, but people love it if they travel for the sake of travelling (and not so much to arrive). This so-called intrinsic motivation plays a vital role particularly in leisure and tourism (and is possibly the secret of success in general)<sup>6</sup>.

Leisure traffic is an intensive mix of derived and original demand. Derived when the journey to the destination is to permit other activities there (such as sailing, riding, walking) and this “purpose mobility” means that the corresponding supply can be “close to the consumer”. A leisure trip corresponds to original demand, on the other hand, when the trip itself is the main purpose. We only have to think of most sea voyages, of “just setting off in the car” for the joy of driving, mountain walking for the sake of physical movement, cycle touring as the rediscovery of physical sensations, company and fresh wind, riding a horse as harmony with nature or a ride on a motorcycle or in an open car as the enjoyment of speed, the countryside and danger. In all these cases, the transport process itself is the primary aim or ultimate purpose (so-called intrinsically-motivated transport or experience mobility: cf. Heinze, 1979, ADAC, 1987)<sup>7</sup>.

The change in awareness in transport planning between 1980 and 1998 shows above all a changed understanding of mobility. The basic rule so hard won by transport researchers, the average number of three trips per person per day, considered to be just as stable as the travel time budget, tends to be interpreted as a relative equilibrium condition of the late industrial society of the 20th century (Canzler, Knie, 1998; Zumkeller, 1998). Thus growing trip distances are no longer seen as a “zero-sum game” of faster vehicles. To be “on the road” or “somewhere else” are considered more as individual benefits and conditions of modern industrial and service society (as Opaschowski pointed out). “Purpose mobility” and “experience mobility” are equally justified. At the same time, the lack of natural saturation limits to transport demand -- as pointed out by Thomson (1974) -- is accepted. Hence the path of reregulation is preferred to deregulation (but will then be able to build on privatisation and greater flexibility). Because of the growth in distances, non-motorised transport has naturally become a major aspect of transport policy. In leisure and holiday traffic there is now a less confrontational approach and, above all, the aim is to avoid motorised traffic through providing a more attractive supply of alternative experience mobility. The prophesied confrontation between established tourism areas and tourism newcomers has not come about: the “old, saturated tourism centres” are stressing ecology and the “new softer bearers of hope” are avoiding gigantism and dreaming of the “green and rich”.

Psychologists, such as Spörli (1973), point out that our living environment is ever less suited for living out emotions, which is therefore increasingly shifted to road traffic. Hence it is only a short step to Opaschowski (1995), who interpreted the findings of his survey of leisure traffic with the words: *“Where people go tends to be of minor importance, the main thing is to get out and away. Leisure begins with setting out on the trip.”*

This also explains the inadequacy of all attempts to reduce the spontaneity of leisure-mobile people by rational argument and traffic regulation: they leave out of account the feeling and experience value of being on the move. Only against the background of this urge to travel can government measures to control traffic be effective, and certainly not so long as this activity of the leisure person is considered to be “useless driving around”. To this extent, both the decisive internal costs and benefits for the leisure person and the external costs and benefits, caused by congestion, ever longer journeys, self-destructive tendencies and economic growth, are derived from this feeling and experience value of being on one’s way.

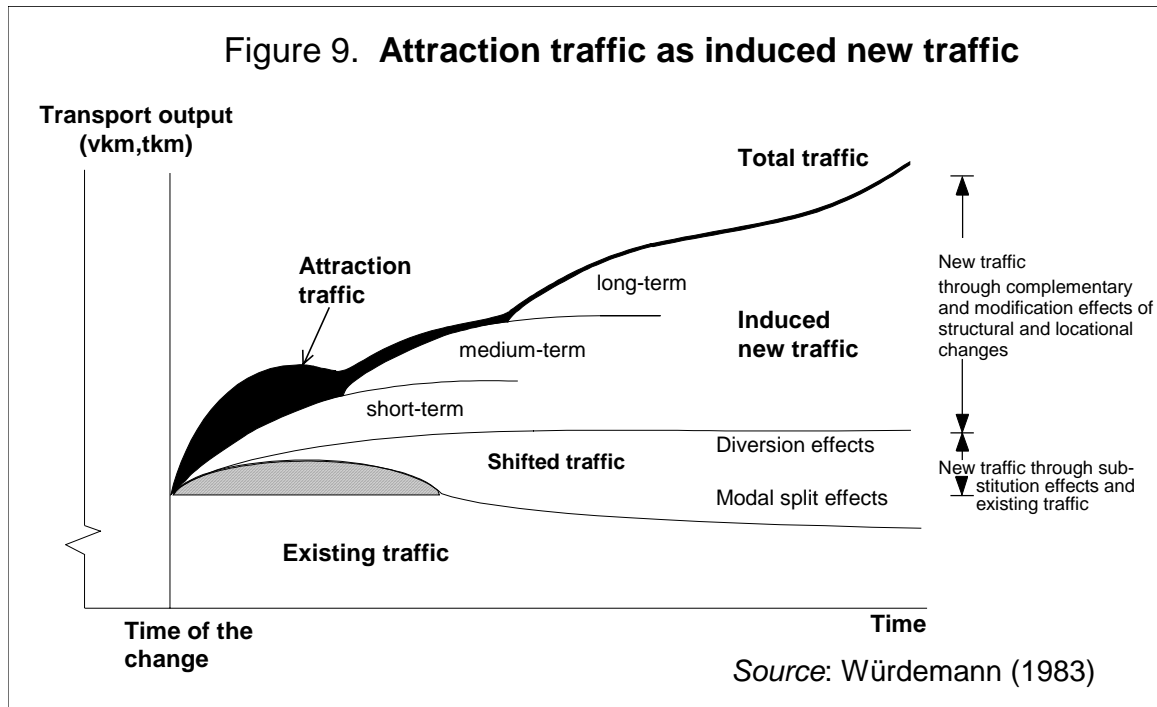
## **5.2. Leisure traffic as the spearhead for new or a renaissance of old transport technologies**

The growth and the innovative nature of leisure activities have led to the latest transport modes quickly finding a use in leisure traffic. There is certainly no money in giving oneself up to longings and daydreams, but it is fun. Therefore solutions are found by dreamers and puzzle freaks in their leisure time. Dynamic entrepreneurs interest themselves in these solutions only if they bring in money. As a rule, therefore, new transport modes are firstly sports and leisure vehicles before being discovered and adopted by commerce, the military and the city fathers, who finally allow them to end their product life-cycle back in the private sphere. Leisure transport has thus played very much a spearhead role in new transport technologies. Historically, virtually all new transport modes in the passenger sector appeared thanks to substantial demand potential in the leisure sector. Well-known examples are the rail routes to seaside resorts, the horse-drawn tram for excursion traffic, rack and pinion railways and cableways to open up the Alps for tourists, the bicycle as sports equipment, the car for the summer holidays, flights to Europe for the Americans after the Second World War and package holidays by air after the introduction of medium-haul jet aircraft. These transport modes marked decisive turning points in transport as well as in the leisure market, in that through mass effects they, above all, democratised travel behaviour. The advertising followed this logic, so that we find either posters with sporting motives, such as, for example, the “gentleman driver” in the introductory phase of the car, or bicycles, motor scooters and cars in a holiday landscape with a courting couple or a radiant family. Just how important leisure and holiday traffic now is for transport markets is particularly clear in air transport: four out of five air travellers in Germany are tourists (mainly on the way to or from holiday destinations abroad).

Leisure traffic thus plays a decisive role in the introduction or opening up of new transport facilities. In the start-up phase in particular, the so-called attraction traffic constitutes the biggest demand for many projects, as new traffic generated by curiosity about the as yet unknown new supply (Figure 9). This experience also certainly applies for the Transrapid and new forms of PT.

The wave of nostalgia for “blessed slowness” began in the leisure sector. Horse-drawn caravans, narrow-gauge railways, steam locomotives, vintage cars, paddle steamers, historic aircraft like the Junkers 52 and the DC3, rafts on the Isar and canoes in the Spreewald are examples of declining transport modes that have taken on a new lease of life in leisure and holiday traffic because of their intrinsic qualities. Many survived only as “sports equipment”, like riding horses, balloons and sailing

ships. Sometimes it was only this existence as a sports vehicle that facilitated the renewed, more general use on a new technological basis, such as modern motor-sailing ships, mountain bikes as a catch-up solution in many tourist resorts or airships for transporting heavy loads and tourists. The same applies to the transport infrastructure of former times. Old canals, such as the Ludwigskanal near Nürnberg or the Norfolk Broads in East Anglia (UK), have become fishing areas and water sports paradises. The Roman roads in England, the military roads in Scotland, the towpaths of the London canals and the smuggler paths of the *Strada Alta* in Switzerland today serve as paths for rambblers; and who would have thought that the population of the Altmühltal would be reconciled with the Rhine-Main-Danube Canal, thanks to its new leisure value, with the international Frankfurt-Vienna cycle tourism path along the canal ensuring full inns and hotels.



## 6. NATURAL AREAS AS LEISURE AREAS

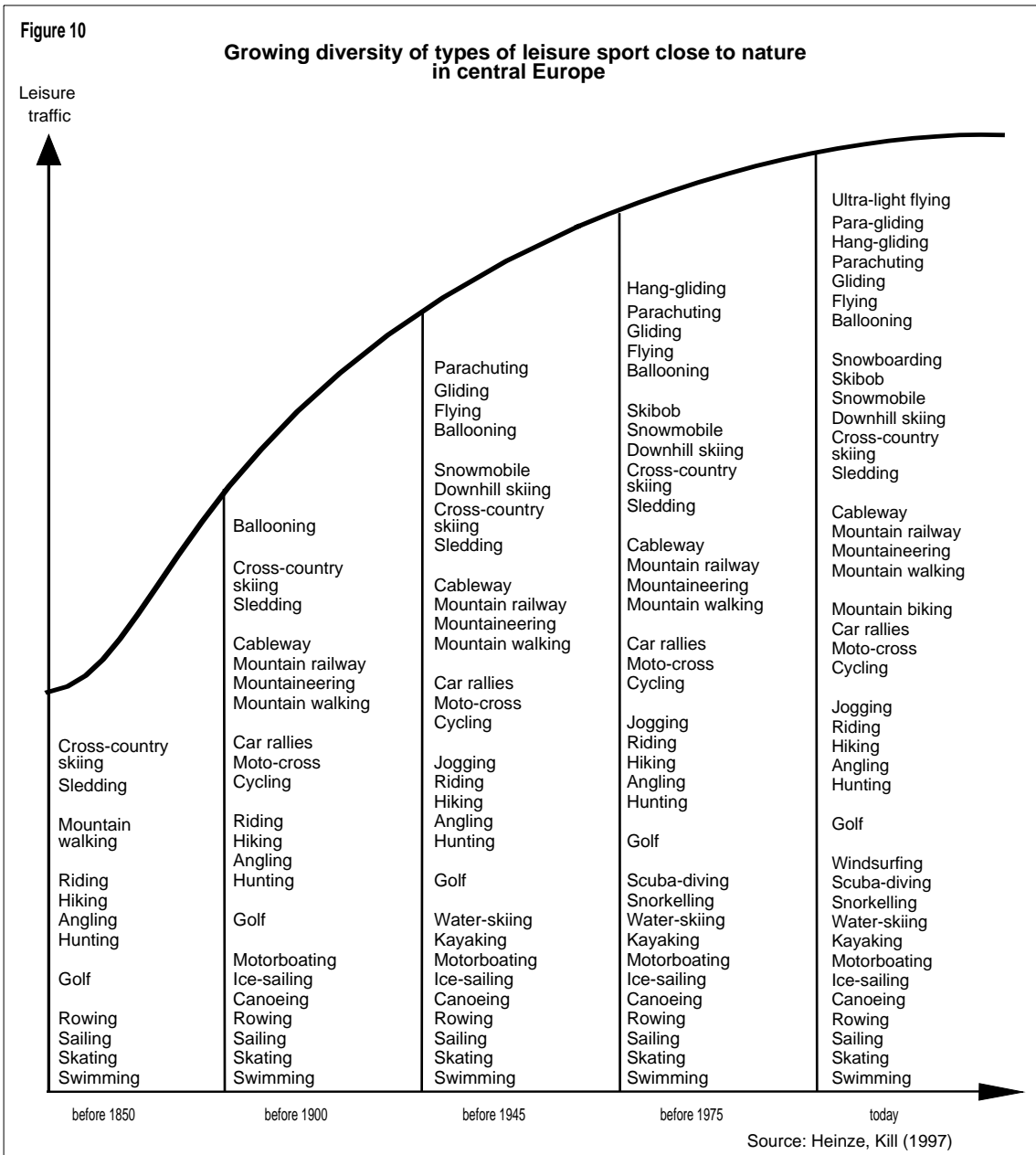
### 6.1. Because sports close to nature endanger the attractiveness of the areas in which they are practised, they need discipline

Hitherto, the journey to the starting point for the true leisure activity has been considered a problem and characteristically designated "primary leisure traffic". "Secondary leisure traffic", on the other hand, includes all movements within leisure areas. These include not only walking, riding and driving, but ever more sports activities that are close to nature, such as cross-country skiing on prepared tracks, ski touring, downhill skiing on prepared slopes, snowboarding, helicopter skiing, skibob sledding, summer skiing on glaciers, mountain walking, climbing, paragliding, hang gliding, flying ultralight aircraft, mountain biking, jogging and cross-country running, sailing, ice-sailing, the

use of snowmobiles, beach buggies and, above all, lifts and mountain railways. This secondary leisure traffic has in recent years become ever more technical and now constitutes a testing ground for new forms of transport and for strategies for the solution of difficult problems of conflicting land uses.

The boom in nature- and landscape-related sports is illustrated in Figure 10. Their growing diversity indicates that they are still in the growth phase of their product life-cycle. Forming part of societal trends, they are known as trend sports, as “(movement) responses to prevailing (movement) requirements and correspond to the present spirit of the time (keyword: ‘experience society’), which can be described with concepts like freedom, spontaneity, informality, risk, self-realisation, naturalness, physicality, authenticity, etc. (Newburg, Thiel, 1996:11).” The number of active participants in Germany in the 90s is already estimated at 11 million (Röscheisen 1996:3).

Sport in natural surroundings corresponds not only to a sporting awareness of life and a healthy way of living, but above all provides responses to people’s questioning of purpose and their need for self-affirmation and self-esteem through the thrill of extreme leisure sports. Strengthened through the media (television, advertising), they reflect not only the tendency for traditional sports to decline, but are also trends that are “manufactured” by the leisure and mobility industry. The individual sport goes through a classical product life-cycle, characterised by intoxicating booms and high remainder bases. Thus, in the space of only five years (1987-92), 2 million mountain bikes were sold. The equipment and market orientation, the appeal to all age groups and the individualistic practice of the sport have shaped this supertrend, which otherwise has surprisingly much in common with the rambblers’ and youth movements of the turn of the century<sup>8</sup>. These include, above all, group activity, escape from the town, nature, movement and the search for self-affirmation, meaning and authenticity. Their problem lies in removing spatial limits through expensive equipment -- mountain bikes, surf boards, hang-gliders, snowmobiles and diving equipment with neoprene suits -- which is technically safe and easily mastered, opening up new spaces and removing the dependence on fixed places, paths, tracks, etc. This basic tendency is strengthened if, in the saturation phase of a sport, further catch-up solutions, whose space requirements can get even closer to nature, are systematically developed (as, for example, with going from *piste* skiing to cross-country, ski trekking, variant skiing and carving). The idea of a mass demand for “a total sport landscape” is however not compatible with the requirements of nature conservation and environmental protection in a densely populated industrial country. At the centre of the discussion of models we therefore find measures aimed at changing the behaviour of active people, to concentrate the practice of trend sports in certain areas, develop substitute areas and possibilities for experiencing nature in populated areas, promote environmentally acceptable and more conflict-free trend sport supplies, use bottleneck components (such as lifts) as control parameters, and to have very strict protection for ecologically sensitive areas.



## 6.2. A policy to control numbers can work without problems

For viewing large, historic buildings, guided group tours are the obvious answer. Felt slippers are also accepted, because they reduce the wear and tear through having a large number of visitors over a long period (and they are fun because they bring back childhood memories and make a complete contrast to the grand interior). Out in the country, the same basic problem arises and here, too, areas with different levels of protection according to their sensitivity are the answer.

Areas can be categorised according to their ecological sensitivity into taboo areas, nature experience areas and scenic areas (Schemel, 1988, 1992). Holidaymakers are kept out of “taboo areas”, because they contain particularly threatened animal and plant species. “Nature experience areas” contain extensive core zones which are left as they are and sensitive zones (dunes, landscape protection areas, forests) that require different levels of protection. “Scenic areas” consist of cultural landscapes marked by agricultural and forestry activities, which are not only particularly attractive to look at, but are also ecologically robust and can therefore stand large numbers of visitors.

The basic conflict is clear enough (Kühn, 1998): nature conservation means preserving biodiversity and the operation of natural processes, while the human uses (like agriculture and forestry, housing, traffic, recreation) make their socioeconomic claims. The solution will be facilitated by the fact that in Germany there are scarcely any natural landscapes that remain undisturbed by human activity. Central Europe consists of cultural landscapes. They are not only landscapes that have been shaped by human activities, but they require the constant intervention of man if they are not to revert to being oak-beech forests. Therefore, cultural landscapes require an integrated strategy in which nature conservation becomes an integral part of all uses. In nature conservation practice, the segregation strategy dominates, with a specific proportion of the area being set aside as a protected area and spatially linked. Nature conservation has precedence on such areas. The aim is to conserve 15 per cent of the land area not already built upon.

The shortcomings of the segregation strategy are its lack of success, its use as an alibi in the continuing environmental destruction, its conflict potential and a lack of citizen participation and hence limited acceptance. The nature conservation associations and the Federal Environment Ministry have therefore introduced the integration principle alongside the still-applied segregation principle. An aggressive strategy of introducing economic development through large, protected areas (such as national parks, biosphere reserves and natural parks) is advocated by Länd Brandenburg. The central idea of the concept of “protection through use” is zoning, with different levels of protection and use. Particularly interesting here are biosphere reserves and regional parks as innovative instruments: the biosphere reserve for ecological economic development in peripheral country regions and regional parks as green belts around the Berlin metropolis according to the decentralised concentration model.

Here, the “biosphere reserve” protected area category is particularly interesting. It qualifies as a workable alternative model for a desirable type of tourism. Appearing in the East of Germany after the change, the biosphere reserve expressly protects a culture landscape, the maintenance of which is based on its constant use (through mowing, ploughing, pasture management). It also expressly includes the recreation function. Model examples in Brandenburg are the Schorfheide and Spreewald Biosphere Reserves. In these, a core zone of, respectively, 3 per cent and 10 per cent of the area is accessible only to scientists.

The logic of graduated accessibility in protected areas is well known. In order to transparently shape and channel the interests of nature, local residents and traffic in good time, the total area needs to be divided into zones of different functionality and sensitivity. This facilitates the differentiated regulation of motorised private traffic, conditions for riders, sailors and surfers and, in particularly protected areas, even walkers and swimmers. To control visitors in sensitive areas, there are prohibitions and regulations, for example, prohibited entry to particularly sensitive areas and indications of authorised bathing places. These restrictions are to be clearly indicated but also need to be policed because, for certain types of visitor, breaking the rules is a sport in itself.

In order to control the disamenity caused by moving traffic, with the formation of tailbacks and emissions of all kinds and drivers looking for parking places and “illegal parking”, one solution that offers itself is to keep car traffic in peripheral zones through a parking management system. The transport avoidance effect of such a decentralised access and control concept lies in the reduction of vehicle kilometres. Of greater importance for modal choice and visitor control is the information system. This includes manned information centres, friendly nature conservation wardens, understandable information boards and interesting nature trails.

An environmentally acceptable organisation of car traffic in and to tourism areas is important, but even more important here is a combination of environment-friendly transport modes (walking, cycling, PT) which can be personalised. The central element should be a “new PT”.

In order to be fully effective, this new PT must fulfil the already-mentioned three essential tasks:

1. Connection with long-distance transport nodes;
2. Shuttle operation between major traffic nodes; and
3. Extensive coverage to serve peripheral places and stops for visitors and residents.

Of particular importance is the solution of interface problems between cycle and PT (cycle hire points, cheap carriage in trains and buses), with reversal of traffic flows at certain times of day and baggage problems.

Despite their relative environmental acceptability, walkers and cyclists too -- because of large numbers or through thoughtlessness -- can cause considerable ecological damage. Therefore, “protection through use” also means skilfully channelling visitor flows and their mobility through special infrastructure<sup>9</sup>. Cycle paths and footpaths bundle unmotorised demand and make cross-country movements more difficult. They should be informatively signposted, in order to invite understanding, indicate the way to sights or facilities (such as clearings, shelter huts, picnic sites) and be formulated in a rambler-friendly way. Straying from paths should be made difficult by means of natural obstacles (such as erratic blocks, ditches, hedges and undergrowth, livestock and fences). Visitor facilities (like camping and picnic sites, shelter huts, sanitary facilities) also bundle visitors. Therefore, they should be installed in the less sensitive locations and not be dimensioned to handle peak demand.

Compliance with the protection regulations should be policed by conservation wardens. These “rangers” provide information about the protected area, lead natural history walks and keep in touch with the local population.

As shown by experience in the regional parks and biosphere reserves in Brandenburg, such a concept involves massive conflicts of interest, asymmetric distribution of power and considerable difficulties of implementation. This becomes particularly difficult when local recreation and tourism still have to be developed and planning goals are not yet coupled with the economic promotion-financing instruments (Kühn, 1998).



### **6.3. Because leisure traffic is a growth area, the rules of the game will change. But this too is an advantage**

The growing number of information jobs will create more work situations which are mentally demanding but lacking in action and movement. As compensation, active but predictable leisure activities present themselves. The omnipresent demand for “flexibility” and the growing superficiality of all solutions will intensify the questioning of purpose. Compensatory criteria, like peace and quiet, relaxation, experiencing nature, movement sports, self-production and experience orientation will gain in importance<sup>10</sup>.

Because leisure traffic is a system trend, new ethical standards for private and entrepreneurial behaviours are inevitable. In the first place, they ensure the leisure traffic of a rich, faceless society for the long term. The aim for future leisure policy should therefore be to change leisure behaviour so as to be able to preserve our differentiated land-use structure and stabilize our resource system. This changed awareness is one of the new rules of the game in a globalising world.

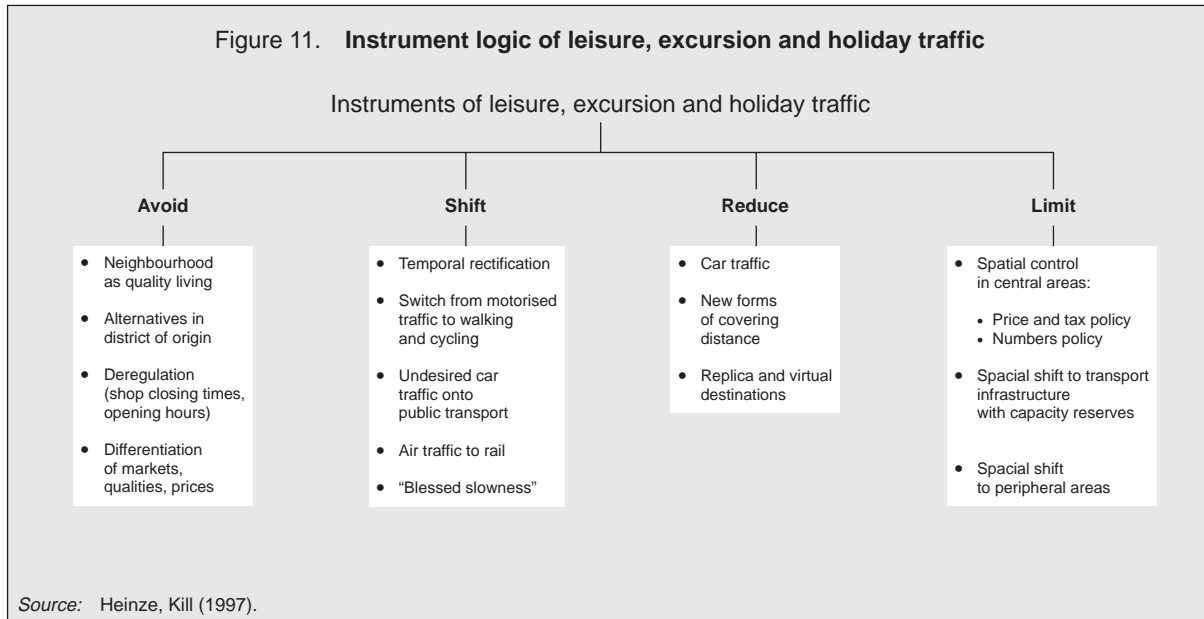
In the literature, as among the actors, there is a consensus that this highly complex policy area can only be dealt with through a combination of integrated individual measures<sup>11</sup>. In densely populated central Europe the identification of new tourism areas is no longer a real solution. This view is confirmed by the opening up of eastern Europe and the explosive increase in overseas supply. A magic triangle of harsh conditions forms the framework for leisure policy in western democracies:

1. They must create alternative catch-up solutions for additional purchasing power, additional leisure and additional mobility.
2. They must keep compensatory leisure traffic to the minimum, even though this is the only safety valve for the pressures of economic “increases in efficiency” in all areas of life.
3. They must preserve the feeling of personal freedom in leisure activities, particularly at a time when restrictions on accessibility cannot be avoided.

Even if more environment-friendly vehicles are introduced in primary leisure traffic, the high level of pollution and damage due to the leisure activity itself still remains. For over-visited natural areas, the number of visitors will therefore become the control parameter for leisure traffic policy. After measures to reduce emissions from car traffic and the general introduction of extensive traffic calming measures in villages and towns, innovative measures are therefore to be expected outside built-up areas too.

The recent changes in public awareness regarding environmental protection, energy conservation, smoking and the sorting of refuse mean that a similar development in leisure behaviour appears not too improbable. The nature conservation idea of the 20th century (“Look, but don’t take”) is a success story. The growing feeling that the whole world is being endangered through the consumption of scarce resources and environmental pollution is leading to greater acceptance of restrictions and incentives. Two tendencies are to be seen here. Particularly in the European countries, there appears to be a growing willingness to accept quantitative restrictions for all rather than drastic price increases for car use and access to natural areas. At the same time, many restrictive models are increasingly coming up against the harsh reality that mere “prevention planning” is rejected. Hence a new strategic understanding of land-use planning is required. In order not to appear only as refusal authorities and erectors of obstacles, planners are developing again -- as in the mercantilist Germany of old -- into stimulators, control agents and development strategists. “Best practice” is therefore increasingly becoming moderation, promotion of smart solutions, informal

action, individualised solutions, talking to one another and constant corrections to the course steered. Here again, we greet the “valiant little tailor”, in that the confrontation between planners and those affected is being replaced on the planning side by clever conflict avoidance, thanks to user advantages, participation and mediation for all concerned. Therefore, one way or the other, it will come above all to deferent forms of control for the whole of the territory. The broad range of instruments available for bringing leisure traffic under control is shown in Figure 11.



At first sight, such restrictions again appear only to be disadvantages. As challenges, however, they represent opportunities for new systems and forward-looking solutions. If we keep our options open, we at the same time challenge the imagination of a social system to find innovative solutions for the conflicts of use that arise. Decisive factors here are optimism, flexibility, creativity and courage. We only need to think of the green belts on former fortification rings and town walls -- once “vacant lots” and today inviolable. Again, gliding was a way around the ban on powered flight in Germany after the First World War; the Boeing 747 was a failed military freighter which, somewhat modified, filled a gap on the civil aircraft market and became the most successful Jumbo. Even the Alpine countries, above all Switzerland, owe their present prosperity to what were once handicaps: their once so harsh living conditions, due to too many rocks and too much snow, the separation effect of their high mountains and their isolation. Discovered by rich town dwellers and the Romantics and marketed as a contrast programme, they attracted “tourists”, who came, climbed the mountains and skied down, while the local peasants shook their heads.

## 7. TRANSPORT AND TOURISM AS SYMBIOSIS

### 7.1. Transport and tourism find themselves in a strategic reorientation<sup>12</sup>

Tourism and the communications industry as developing worldwide as “leading sectors” of economic development. The total turnover of the world-wide tourist industry is estimated at \$US 3.5 billion (2010: \$US 7.1 billion). The number of jobs is expected to increase between 1996 and 2010 by over 50 per cent, to reach a total of 385 million, and the worldwide investment of the travel and tourism sector will increase from \$US 766 billion to \$US 1.6 trillion (World Travel & Tourist Council, 1996). Thus, the tourism industry is already today the biggest branch of the world economy.

This growth is associated with far-reaching changes in needs, wishes, demands and competition. However, to meet these growing demands, the tourism industry, like transport and transport planning, has only worn-out traditional products: today’s car, the unloved PT and long holidays. New products are necessary and new yardsticks unavoidable.

Both branches -- tourism and transport -- are becoming more differentiated. While the “sun and sand” holiday on Majorca was a single market segment for Spanish tourism planning twenty or thirty years ago, a distinction is now made between at least 31 segments (Bordas, 1998). Similarly, on the German car market, the Volkswagen AG marketing division identified nine segments in 1987, but this number had already risen to 21 by 1995. The two extremes are the high net worth client, demanding and experience-oriented, who wants a tailor-made holiday, and the cost conscious client, who books a cheap hotel with a beach and guaranteed sunshine. Because the supplier’s marketing has to target ever more groups, flexibility, openness and improvisation come to the fore. Services cannot be stored, however, and this brings the problem of having to be constantly ready for action, peak demand and periods with low demand. In other words: permanent competition. Thus, family businesses, subsidiarity, deregulation and privatisation are being rediscovered.

In both branches, the hybrid customer dominates, he who above all wants to escape from uniformity and mass consumption. In the pursuit of identity he therefore combines the most varied options with one another. If the supply suits, he grabs it. It has therefore become normal even for the young, open-minded transport planner to cycle to the office but, in his holidays, to enjoy the underwater world of the Maldives, to get champagne from Allude and fly to London for shopping; to plead for lower rail fares, but to take the family’s VW bus to go skiing with friends. Because it is above all quality and bargains that count, he is an unreliable customer with no loyalty. This is true of his transport behaviour and the way he uses his leisure, for both belong together and for very many people leisure and holidays are the times when they treat themselves to something special. At the limit, each individual is a market of his own and forecasting becomes simply playing with numbers.

In both sectors, the “hardware” still remains in the foreground. In tourism planning, it is the features and facilities of the place, the hotel and the rooms, even though the guest would like above all to be looked after and particularly enjoys hospitality, comfort and emotional qualities. Yet transport undertakings too do not simply operate vehicles, but produce a pleasant conveyance to the desired destination. Somebody returning from a recent trip across Australia related his experience: “... and if you’ve taken a room somewhere, you’ll be told not only what there is to do around the place, but you’ll be asked: ‘Shall I book it for you?’ And then: ‘The bus will pick you up at 8.30 tomorrow morning.’ They were ancient buses, but the important thing was that it was all arranged for me, the

*bus was there, the payment was secondary, what mattered was only the service.*” In our transport planning, however, the intrinsic motives (“experience values” like entertainment value, comfort) are still underestimated and only “operating values” (as objectively determinable characteristics of the enterprise such as timetable, fares and capacities) are considered as appropriate (even if the customer wants quite a different service). This may also be due to the professions of the actors, here economists and there too narrowly-trained transport engineers. In all service activities, however, the affection of the clients can be won only if the staff like their own product and the management principles are oriented towards this. This means an emotionalisation of the products, the management, the rewards, the ideas and the experiments. If customer orientation leads to a “service feeling, which is more than a smile on the part of the staff, more of an inner attitude” (as demanded at ITB ’98), the circle of intrinsic motivations is closed on both sides.

The products of both branches have become so much a matter of course that falling incomes lead not to the renunciation of travel and trips, but only to more cost-conscious behaviour (only two weeks’ holiday instead of three and in a fourth-class instead of third-class hotel, or the second car is sold, the present car kept longer than normal or a used car is bought). In both branches, growth is so normal and inelastic, that car driving and tourism are now being associated with addictive behaviour. This probably applies for the “long wave”, through which deficiencies in the system, new products and changes of environment support one another. To this extent, both branches are consequences of socioeconomic development, with a considerable momentum of their own, but always relativised in structural crises. The real danger for both branches is therefore a naïve assumption of continuing growth.

In both branches private facilities function considerably better than public: everyone knows the difference between his private travel agent and the local tourist information office, between the advertising of the private agencies and that of the *Länd* tourism association, between the private airline and the municipal transport services. Telematics is penetrating both fields and bringing simplified booking systems, increasing the capacities, enhancing the environment-friendliness, creating substitute and virtual destinations, but also bringing lower prices, competition and growing vertical integration in chains and in firms.

## **7.2. The transport and tourist industries have much to offer each other**

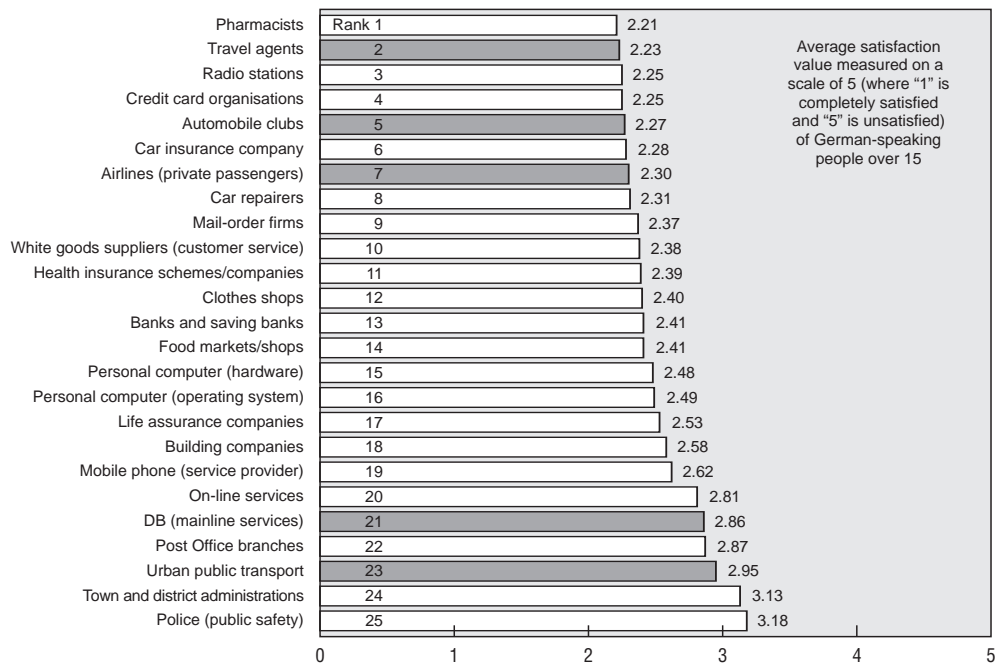
As service activities, both transport and tourism are particularly affected by the globalisation of markets and the individualisation of lifestyles, but both branches also have good chances of again being among the winners. If Europe is not to become poorer it must build on its strengths. These include:

1. Fields of activity that are difficult to rationalise, such as services connected with the body;
2. Industries with a future, whose key and pace-setting technologies must be recognised and developed, e.g. telematics, environmental protection, control technologies, user-friendliness;
3. Traditional strengths, like the central European town, transport technology and engineering.

The renaissance of railway technology, battery technology and the pharmaceutical industry demonstrates the capacity for growth and innovation of industries that had once been written off or were dormant. At the same time, it is becoming clear that most services are developing around the technology and systems fields and are stimulating one another (Sommerlatte, 1998).

Transport planners tend to be quantity- and technology-oriented. They are top-down thinkers: operations stand above everything else and marketing is still considered to be expensive propaganda. Therefore, the German railways (DB mainline services) and PT find themselves ranked 21st and 23rd out of 25 as regards customer satisfaction (C. Wolber, 1998, Figure 12). The travel agency, on the other hand, relies on customers for a living, has to think from the customer's standpoint in order to reduce the complexity of the market for him, and is therefore in second place in the customer satisfaction ranking (though below the pharmacists, who are also faced with tough competition through freedom of establishment and health service reform).

Figure 12. **Ranking of customer satisfaction with services 1997**



Source: Das deutsche Kundenbarometer (1997).

Both branches are very heterogeneous, but the greater part of their activities takes place locally. The transport planner knows the concept of handling large numbers, the vagaries of which the tourist industry is experiencing only now with the growing demand for events. The trend to short trips as an opportunity for the tourism industry now requires, from both branches, personalised local transport.

### 7.3. Above all, transport and tourism are stronger together

Because transport and tourism are both in a situation of structural crisis, they can support one another in an effective fashion. For the catch-up strategy of “more leisure traffic instead of tourism” tourism must be able to base itself on a need-oriented, flexible and efficient transport system. Because leisure traffic is so difficult to forecast and plan, however, the transport sector needs the

growth market and the closeness to the customer of the tourism sector in order to be able to renew itself. The knowledge that they are dependent on one another offers the chance of a true symbiosis; on top of this, our towns, villages and natural areas will also benefit.

## 8. CONCLUSION

In Germany, the highest growth in relation to purpose of travel is in leisure and holiday traffic. One trend is towards spontaneous, shorter, more frequent and more intensive trips. The dividing line between leisure traffic (up to three nights away from home) and holiday traffic (over three nights) is becoming blurred. Another trend is towards long-distance overseas tourism.

Long-term forecasts for leisure and holiday traffic point to uninterrupted growth and an even more predominant role for the car. This is no zero sum game, for the number of trips and the travel time budget are rising. What we thought was a stable framework was merely a temporary steady phase in the late industrial age. Leisure travel of up to four days in Germany is therefore mainly attributable to additional demand. There is enough cake for everybody, since basic demand for the sunny south still persists.

“More leisure traffic” provides a back-up strategy for Germany as a destination without sunny skies. This stance by hoteliers and tourism managers is based on the remaining and newly-created demand in Germany. It is therefore not a solution for every country, but at best one that is applicable to only a few other central European regions.

Deurbanisation and reurbanisation are stages on the way towards a town/country association. Being on the move and being elsewhere are seen as personal advantages and as the prerequisites for a modern industrial and service society. More “optional traffic” is generated as more motorised “necessary traffic” is avoided. All this promotes a new concept of leisure, a new transport policy and a new form of community transport. This new picture encompasses the rediscovery of a small-scale identity -- with proximity, the niche and the group as a reaction to globalisation -- golf courses and regional parks as recreational areas, the merging of MIT and PT, telematics as interfaces and the influence of leisure traffic on the introduction of new or the re-emergence of old transport techniques.

What counts are not today’s towns but tomorrow’s urban regions, not the present public transport system but a new, popular form of community transport, and not only rare species of animals but the preservation of cultural and nature destinations so that we know to where it is still worth going when we can go everywhere.

New solutions are implemented in a bottom-up approach and originate where the pressure of problems is at its greatest (as in the Alpine winter sports resorts). Therefore scarcely anything new has to be thought up: by looking around carefully, almost everything can be found on the spot. Only the new organisation system has to be set up. This includes a price policy, which need not be over-restrictive, and capacity limitations without a planned economy or protectionism.

The more market segments there are, the more difficult their precise planning becomes. The fact that they are short-lived is also to be taken into account. The obvious solution for the transport planner is therefore to make a virtue of necessity and to emphasize flexibility, multifunctionality and self-organisation. This forms part of the explanation for the car's success story.

Planning cannot replace the market and planning against the market has no lasting success. But investors alone do not create living environments and call for planning as a policy framework for self-organisation. What is therefore of the utmost importance for the transport planner today is that he should continue to believe that our world can be organised. Only with such optimism did a brave little tailor become a king.

## NOTES

1. The full presentation of these relationships is to be found in Heinze, Kill (1997). This book contains a realistic catalogue of measures for each field, as shown for PT in Figure 8.
2. Hotels, inns, guesthouses, bed and breakfast hotels.
3. As an expression of mass private-vehicle ownership, day-trippers' sensitivity to distance has significantly decreased. While a distance of up to 50 km was still preferred by 90 per cent of day-trippers in 1971 (Beckmann, 1975), by 1995 this figure had fallen to 60 per cent (DWIF, 1995). The distribution of demand in Brandenburg was estimated by BTE, FU (1998:56) for all transport modes to be: up to 25 km, 40 per cent; to 50 km, 25 per cent; to 75 km, 15 per cent; and over 75 km, 20 per cent.
4. This catalogue of goals goes back to Enzensberger (1996) and was completed by the author with "security in the group".
5. If we look more closely, leisure is already today, above all, work that people enjoy (and should be even more so in the future, as was formulated in an Appeal by the Churches at ITB '98).
6. If an action is extrinsically motivated, the reward comes at the end. If it is intrinsically motivated, the reward is in the action itself.
7. Because of its "end in itself" components, the car fascinates, while traditional PT bores. Asked each semester about the intrinsic qualities of Berlin PT, students can only ever think of three examples: riding in the upstairs front seat of a double-decker bus, fare dodging and surfing the *S-Bahn* (= moving from car to car outside the train).
8. To the question "Is *advertainment* the magic word in dealing with young consumers?", Axel Ohm, Product Manager in the sports-marketing branch of the firm, West EP, replied: "*In the final analysis it's a matter of skilful manipulation. The keyword in dealing with the youth scene is authenticity. Already in 1989 that was the recipe for success in our first fun sport project, windsurfing. We have demonstrated that we can bring people together. The keyword now is socialising. The willingness to go to events is growing because people are increasingly isolated in everyday life and a great longing for social meeting points is developing. Sport is just the connecting component* (Ohm, 1995:23)."
9. This too is an opportunity in all natural areas: to protect and, at the same time, to live on what the excursionists spend. Thus *Land* Brandenburg has some 3 500 lakes and is urgently seeking tourists. The number of lakes with paths round them for the active Berliner and a strategically placed restaurant with a regional menu and moderate prices, can be counted on



your fingers, however. At the same time, Brandenburg is the German *Land* with the biggest ratio between day trips and overnights [according to the DFWIF (1995), 20:1 as against 9:1 in Berlin and a national average 7:1, all data on the basis of overnights in establishments with more than eight beds].

10. If employment and incomes fall as well, the pressure on roads, open spaces and the open country will increase -- as in the 20s and 30s -- because “inside, everything costs money” (Laurie Lee, 1973).
11. How realistic models of leisure behaviour appear which are acceptable to nature and the landscape are shown by the solutions for various trend sports in: *Deutscher Naturschutzring* (Ed., 1996): submission to the Congress on “*Leitbilder eines natur- und landschaftsverträglichen Sports*”, Wiesbaden.
12. The strategic perspectives of the tourism industry described here were greatly influenced by the paper by Eulogio Bordas, President of THR Tourism Consultants, on the subject, “Customer Focus in Tourism. Claims and Reality”, presented at the International Tourismus Börse, ITB `98, 11.3.1998, Berlin.

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AUSTRIA

**Hermann KNOFLACHER**  
**Technische Universität Wien**  
**Vienna**  
**Austria**



## SUMMARY

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Vienna, April 1998

## 1. THE PROBLEM AREA

Total transport volume is already dominated by leisure traffic. In Austria in 1995, 55 per cent of total mobility measured in kilometres (over 50 per cent in Germany) was in the leisure sector. In car traffic, the figure is as much as 60 per cent. Jost Krippendorf speaks of the “*general mobilisation even in leisure traffic*”:

*“Anything but stay at home! Just let’s get away! Thus it happens that year after year, weekend after weekend, without any need and without any recognisable pressure, millions of people use their valuable time to herd together. Almost everyone goes along with it, obviously of their own free will, but as if under orders. They line up in columns of cars or have themselves sent in consignments by bus or rail. They lie packed together on beaches that have become too small. They stand in queues in front of shops and restaurants, before ski lifts and cableways and before sights that are already quite worn out from being looked at. Sometimes they stay in accommodation reminiscent of slum houses. According to a behavioural researcher, if an employee had to put up with such bad conditions during his working hours, the union would quite rightly step in. Compared with today’s hosts of leisure trippers, the ancient migrations of peoples look more like works outings (Krippendorf, 1984).”*

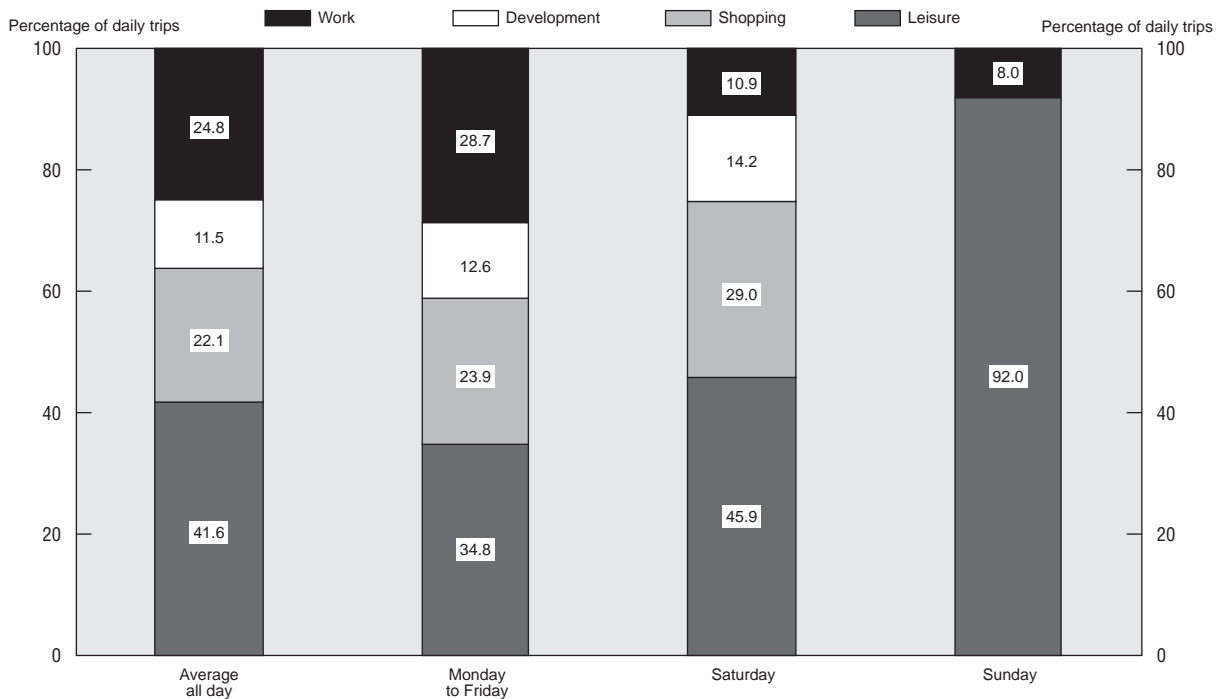
## 2. DEFINITION OF LEISURE TRIPS

It is extraordinarily difficult to define pleasure trips because the boundaries are fuzzy and leisure trips are an end in themselves: walking, running or cycling, visits to friends, trips to the cinema, journeys to a holiday destination are leisure trips for a specific purpose. A further group are spontaneous leisure trips, for example, just setting off with no fixed destination, escaping from the everyday situation. Among the regular leisure trips are journeys to competitions or training and weekend excursions, leisure in country areas or excursions to areas with attractive landscapes. Leisure trips that are purpose-oriented are, for example, a theatre trip to the capital or urban tourism. Lastly, the many leisure trips also include taking children to and from leisure activities (service trips).

The importance of leisure trips for everyday life was long underestimated. The fact is that leisure trips dominate in terms of the number of trips. It emerges from household surveys in Austria that, on an average day, 25 per cent of all trips are for work, 12 per cent for education, 22 per cent for shopping and the rest are leisure trips. On Sundays, 92 per cent of all trips are leisure trips. A graph produced by the Austrian *Verkehrssclub* (Figure 1) shows the typical breakdown of leisure and other trips on weekdays and at weekends.

All the surveys show that in leisure trips the car is used much more often than for other types of trip.

Figure 1. On average, 41% of all trips are “leisure traffic”



Source: Amt der OÖ Landesregierung (VCÖ).  
Graphic: VCO Verkehrsclub Österreich 1998.

### 3. MANIFESTATIONS OF LEISURE

Leisure activities and the associated mobility differ in their time profile and according to their purpose.

#### *Time profile*

There are differences between workday leisure activities, weekend leisure activities, occasional events and holiday times.

Walking, running, cycling, short drives and so forth are mainly one-day activities. Weekend trips include looking for a place for a second home, recreation, trips to the country and visits to other towns. Sport as leisure can include both day and weekend activities. A sector with growing leisure mobility is that of what are known as “events”. In earlier times, these events in Europe were very often organised by the church in connection with activities associated with religious festivals. Today, these events are mainly commercialised and there are even some special types of firm appearing, for example, in connection with shopping and leisure. Journeys, in particular long-distance trips, are essentially periodic manifestations which appear at less frequent intervals.

#### **4. THE TIME DIMENSION OF LEISURE AND TRANSPORT**

In earlier societies, the time boundaries between leisure and other activities were blurred. With the organisation of production in factories, these boundaries became increasingly sharp. With the longer obligatory working hours, caused by the use of machinery and the possibility of continuous operation, the employee's free time was reduced to a minimum on workdays and concentrated mainly on the short weekend. Part of the leisure activities were pilgrimages, organised by the church, which have now metamorphosed into, for example, sports events and concerts, but yesterday's pilgrims, like today's, came together not only through common interests but often also through the acceptance of considerable difficulties in their leisure mobility. Whether it is a matter of motor sports events, ski races or pop concerts, the flows of pilgrims converge, as in the Middle Ages -- although today they have technical aids -- concentrated in time and space.

Another temporal dimension of leisure traffic are the well-known weekend peaks, on the one hand in the towns and, on the other hand, in the more attractive country areas. Today's leisure traffic ebbs and flows according to the time of day, day of the week and season of the year. While the daily peaks do not generally overload the capacities of the existing transport system (apart from special events), the weekend leisure traffic often reaches or exceeds the capacity limits.

Capacity enlargement of transport infrastructures to eliminate these deficiency symptoms in the towns is being ever more clearly rejected by future-oriented traffic planners. Part of this problem can be remedied through improved urban development and part through improved public transport. Something that a few decades ago was regarded as a problem, namely congestion, is no longer considered as such by the experts concerned.

The seasonal dimension of leisure traffic is characterised by long-distance and tourist traffic, and many areas of Europe have a very marked winter season while others have an even more marked summer season (Figures 2a, 2b).

Figure 2a. Automatic road traffic counts in Austria, 1996

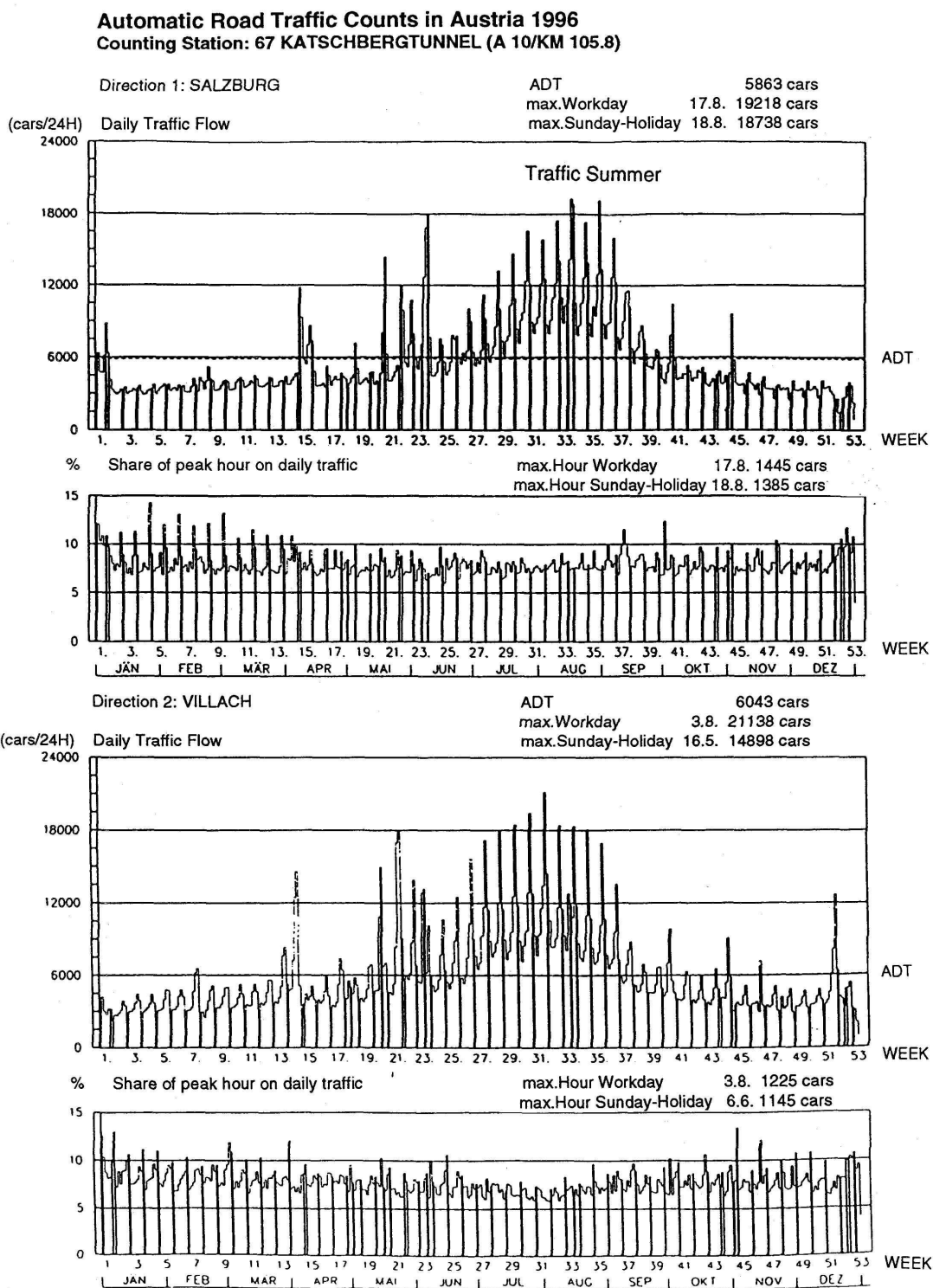


Fig. 2a

Figure 2b. Automatic road traffic counts in Austria, 1996

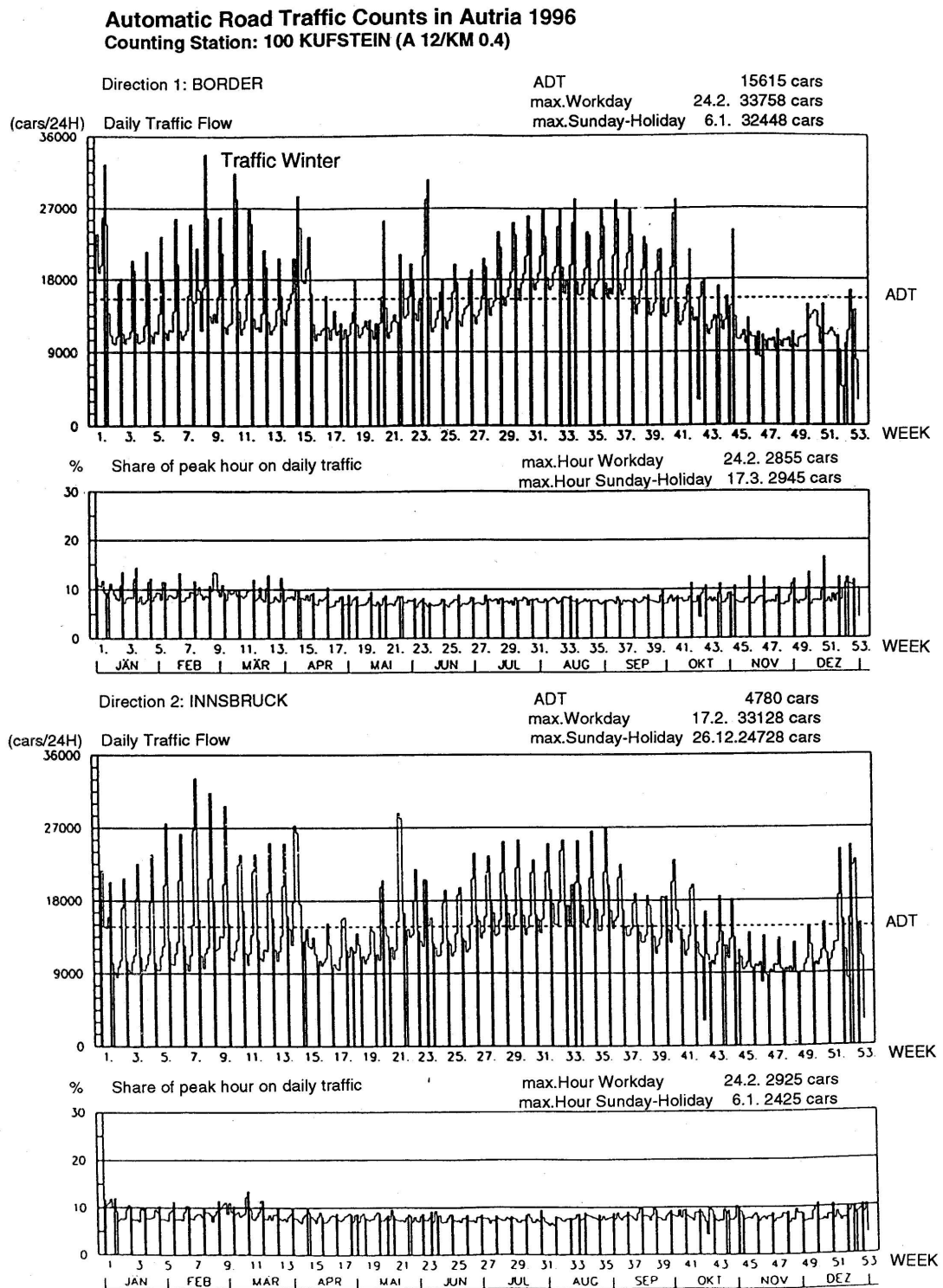


Fig.2b

## 5. SPORT AND LEISURE

The study by Jürg Städtler, 1997, on sport and traffic, analyses the order of magnitude and composition of sports-related transport output in Switzerland and the associated environmental pollution. For sport, the average distance covered to training sessions was 9 km, competitions 36 km and for sports holidays the average distance covered was 500 km. The annual average per capita transport output for sport itself is around 850 km, with an enormous range: for example, 8 000 km for racing drivers and 350 to 400 km for runners. Sportspersons account for about 10 billion person-kilometres or over four-fifths of total sports-related traffic. The spectator share is 14 per cent. In total, sport accounts for about 12 per cent of total passenger traffic in Switzerland, with over 12 billion person-kilometres. The sports share of leisure traffic is 24 per cent. The great dependence on the car is clear from the fact that 78 per cent of total sports transport output uses this mode. Public transport in Switzerland accounts for 18 per cent of sports traffic volume, measured in kilometres covered. The 380 000 sports events in Switzerland give rise to a sports transport output of 3 billion person-kilometres a year, or 25 per cent of total sports traffic. Active sportspersons use on average 75 MJoule of energy for transport to each sporting activity: 60 MJoule to training, 51 MJoule to competitions and as much as 1 640 MJoule for sports holidays. Transport energy consumption per sportsperson over all types of sport amounts to some 2 000 MJoule a year (see Table 1).

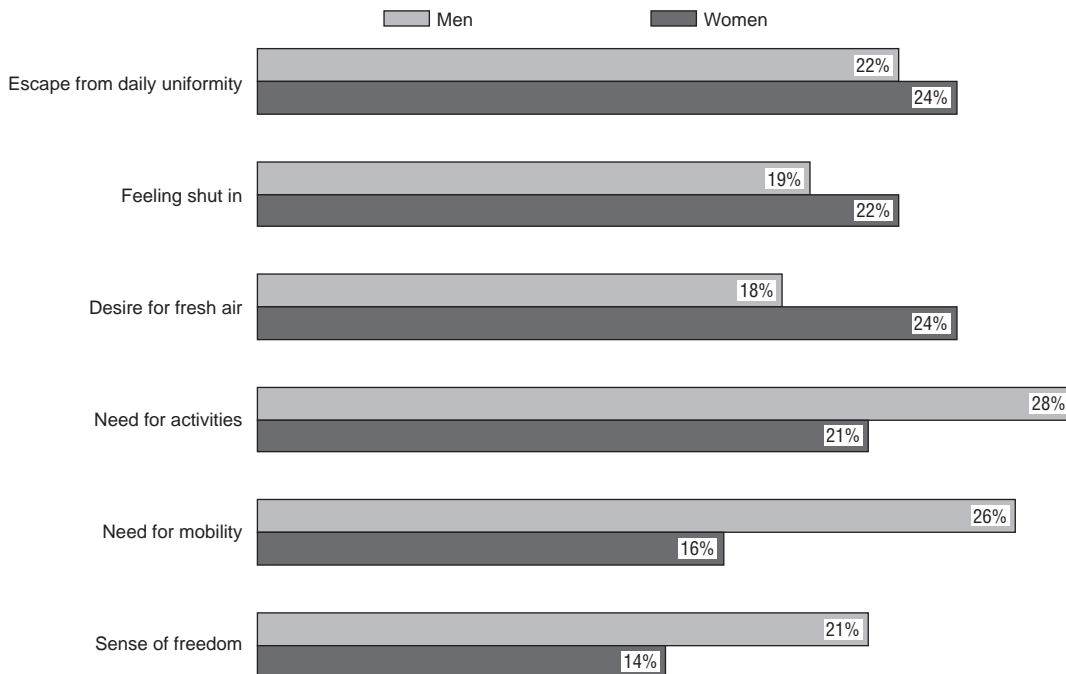
Table 1. **Average primary energy consumption by sportspeople for the round trip to training, competitions and sports holidays (MJoules, rounded)**

Type of sport	Average primary energy consumption by sportspeople for the round trip to:			
	Training	Competition	Sports holidays	Average
Diving	200	1 800	20 000	1 200
Skiing	350	1 900	1 150	410
Climbing, ski touring	320	560	1 450	350
Snowboarding	310	860	760	320
Rambling	100	280	1 630	130
Ice hockey	85	130	420	100
Tennis	55	240	1 770	70
Swimming	60	260	760	60
Volleyball	50	90	400	60
Basket ball	45	90	400	55
Cycling, mountain biking	30	490	1 110	50
Football	40	70	930	45
Keeping fit, weight training	45	280	430	45
Gymnastics	30	180	400	30
Running, jogging	20	310	2 530	25
<b>Overall average</b>	<b>60</b>	<b>150</b>	<b>1 640</b>	<b>75</b>

## 6. THE IMPORTANCE OF LEISURE

Leisure is of growing importance in people's awareness, not only quantitatively but also qualitatively. This increase in importance can clearly be seen from successive surveys. The proportion of the population who considered the leisure sector to be particularly important for the personal lifestyle increased in Austria from 29 per cent in 1987 to 36 per cent in 1996. One-third of the population over 14 have the feeling that they have too little leisure time available. Almost one-third -- 27 per cent in 1987, 30 per cent in 1996 -- would give up an increase in earnings to have more leisure, even though the leisure budget has increased enormously. There are significant differences between men and women regarding the reasons for leisure trips (Figure 3).

Figure 3. Reasons given for leisure trips by men and women



## 7. THE LEISURE BUDGET HAS INCREASED

In the case of the gainfully employed, the amount of leisure time has considerably increased in the course of time, through shorter daily, weekly and yearly working hours and a shorter working life. According to Hautzinger, over the past forty years, the weekday leisure time has increased from 1.4 to four hours, leisure time at weekends increased significantly through the introduction of the five-day week, and annual leave increased from nine to 31 days. Present trends indicate that the number of individual free days will increase and that short breaks, for example, three days off, not necessarily associated with the weekend, will grow in importance. Another parameter is the growing amount of technical equipment in the household, which could reduce the amount of time spent on domestic activities.



The day is divided into working time, obligations time (time for activities that have to be performed in coping with everyday life, such as shopping, repairs, dealing with the authorities, family obligations, etc.), reproduction time, sleeping, eating, personal hygiene and leisure. Leisure activities include talking and socialising with family and friends, visits, games, making music, sport, using the media, cultural activities, walking, cycling, visiting churches and graveyards, excursions and travel. The time devoted to these different activities varies enormously according to circumstances. On average, the weekday leisure time for people in full-time employment amounts to 4.5 hours per day, for pensioners and young people from 12 to under 18 years 6.5 hours per day. These are average values for work days and week days. Leisure activities can be performed either at home or away from home. The latter activities involve leisure mobility. This covers all changes of location for leisure purposes outside the home. Leisure mobility thus extends from gardening just outside the house, through the evening stroll in the immediate vicinity, to weekend visits to friends close by or further away and, finally, to flights to the far side of the globe. Leisure mobility is characterised by constant changes in the activities that are to be allocated to the leisure sector. Economic structures, in the meantime, are reacting massively to the changed leisure conditions and trying to use this potential for their own purposes. Examples are experience shopping or the development of so-called experience worlds, twinned with shopping centres.

We know from tourism research that 2 billion day-excursions a year are made in Germany alone. Every second excursion lasts longer than six hours, every seventh longer than twelve hours. The average excursion lasts eight hours and 70 km are covered (DWIF, 1995). According to the present BAT representative survey of 3 000 people over 14, two-thirds of the population used the car as the transport mode on their last day-excursion. Opaschowski observes that in leisure mobility the railways (4 per cent) and urban public transport (4 per cent) are of almost no significance: for one urban public transport passenger there are more than 16 car trips. A special sector of leisure activity lies in what is known as “event tourism”, which is characterised by Opaschowski as a mixture of thirst for experience and urge for movement, sensation and happening. Forty-three per cent of the population over 14 flock at least once a year to mass spectacles which promise an experience and communicate a feeling of “togetherness”. The most popular at present are open-air concerts. Sports, cultural and urban tourism trips are much in vogue today and have increased significantly over the past five years. In the future “experience age” sport, for example, may only be able to maintain itself as a market place for sponsors and the commercial leisure world between physical culture and experience marketing. The boundaries between staged production and marketing are becoming ever more fuzzy. New rules are being invented and new types of sport are being created. Pop and showmanship have entered sport and, in the future, sport as a production will run like a television soap opera. Stage management is the logical consequence of commercialisation: and it is only a small step from stage management to the sensationalisation of sport. In the future, sport and spectacle may well be spoken in the same breath (indeed, this is to some extent already the case today). The development of event tourism can clearly be seen through two figures. In 1984, there were 200 spectators for the Davis Cup match between Germany and Romania in Berlin, in 1996 for the ART tournament at Expo 2000 in Hanover there were over 90 000.

Experience mobility is a phenomenon of western consumer society: the more supply or activities become accessible to broad sections of the population, the more widely mobility also increases. The findings of recent mobility research are forcing some rethinking in transport policy: hitherto, it was thought that the creation of an attractive local area or living environment was the decisive factor for one option, the avoidance of a certain amount of transport. But how effective is it to spend a lot of money and effort making the locality attractive to look at and to live in if the experience industries,

with an even greater advertising effort, give local residents the feeling that all the action is elsewhere. Trying to reduce mobility under these conditions amounts to trying to persuade people to feel guilty (Enquete-Kommission 1994, page 133).

## 8. SYMPTOMS

Professor Romeis-Strake describes the dimensions, background and outlook for leisure mobility by means of the following key indicators.

In Germany in 1996, the longest tailback extended 100 kilometres, there were seven “super tailbacks” of over 50 kilometres and 399 long tailbacks of between 10 and 50 kilometres. Some 440 000 German citizens had their holiday or excursion spoilt in 1994 through car theft or breakdown, while 2.8 million German tourists became ill on holiday in that year. In Spring 1996, a fully laden aircraft carrying mainly German holidaymakers crashed in the Caribbean Sea.

On 28 September 1996, there were about 1 million people at the Munich Festival. In the *U-Bahn* the conditions were like the Tokyo rush hour. The cycle touring path along the Danube is so overcrowded every weekend that it becomes blocked and there are pile-ups. The advertising of cycle tours along the Danube has, to a large extent, ceased.

## 9. FACTS AND FIGURES

In 1995, some 600 million people world-wide crossed their national frontier for leisure activities. Also that year, 78 per cent of adult Germans made one or more holiday trips of over five days. This proportion had greatly increased over the years:

1954	24%
1980	58%
1995	78%

In 1995, there were 49 million travellers and 57 excursions per capita that year, making some 2.1 billion excursions. The so-called “net travel intensity” (percentage of the population over 14 who made a holiday trip of at least five days) was as follows for selected European countries in 1994:

Germany	78%
Switzerland	72%
Denmark	71%
Sweden	68%
Norway	66%
France	63%
England	60%
Netherlands	58%

The tourist industry in the EU employs some 12.4 million people. Taking the leisure sector as a whole, the figure must be about three or four times this. In Germany in 1965, for example, the turnover of the tourism sector was twice that of the agricultural sector, about the same as that of the chemical industry and only a little less than that of the automobile industry. This makes the leisure sector, with some 430 billion DM, the biggest in the German economy. Car use in leisure mobility accounts for a substantial part of this, with some 184 billion DM.

Generally speaking, leisure mobility increases in proportion with the degree of mechanisation of a society.

Germans use the car for 52 per cent of holidays and 57 per cent of excursions. Air travel is clearly gaining ground in leisure mobility, with 22 per cent in 1995. In that year, 29 per cent of Germans stated that the meaning of their lives might lie in travel (Opaschowski, 1996).

Negative side-effects in leisure mobility were considered to be road accidents, sickness and environmental damage. Leisure mobility is optional mobility -- is it really optional?

## **10. LIMITING LEISURE MOBILITY**

We find ourselves today at the beginning of the limitation of mass leisure mobility. Quotas are being imposed:

- Day ski passes in many Alpine regions, in order to restrict day excursion traffic;
- The association of car-free spas in Switzerland to a large extent prevents cars from entering these places: electric buses facilitate the acceptance of this measure, which is very high, as shown by the overnight figures in these resorts. To have no cars on the spot is attractive, but not to the spot;
- In the organisation of big events, less and less account is being taken of the car. Public transport management is used to try to control visitor numbers.

Tourist resorts are increasingly offering discounts to holidaymakers who come by train. Cinemas, stores and leisure centres in the town centres reimburse the public transport fare, car-free experience days are intended to lead to a transition to a normal situation of car-free holidays.

## **11. STRUCTURES**

Data on leisure mobility are the result of behaviour patterns. Behaviour patterns, in turn, are always the result of structures. These include infrastructures, organisational structures and information structures.

Vance Packard, in his book, *Nation of Strangers* (1972), already sets out the main fields that outline the structures: the table of contents reads very much like a structural analysis of modern leisure mobility:

- A society of uprooted;
- Travel to research the uprooting;
- Towns for nomadising employees;
- Gathering places for modern nomads;
- The three-tier towns;
- Academic breeding grounds of rootlessness;
- The “migratory birds” of the dispersing family;
- The new forms of urban sprawl;
- Problems of adjustment to splintering;
- The creation of new human contacts;
- New institutions in the service of mobility;
- Influences on people’s behaviour;
- Arguments for a very mobile society;
- Remarkable living habits due to weakly rooted people;
- Inclination to unease among weakly rooted people;
- Effects on children.

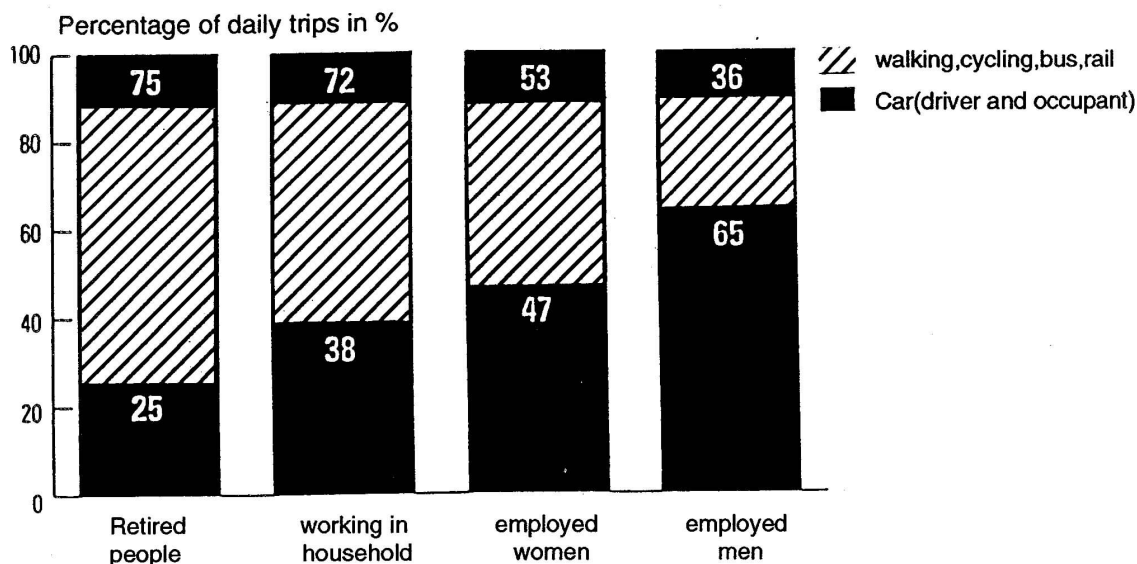
Superficially, there even seem to be contradictory results in the data. There is obviously a connection between the quality of the home environment and mass mobility. Opaschowski suspects that there is a contradiction here, however, for manual workers, unemployed people and pensioners are seen to be the least represented among day-trippers, even though these population groups are the most likely to have problems with their home. Precisely the opposite is the case. There seem to be important factors that outweigh this one, such as, for example, experience mobility as a phenomenon of western consumer society. Masses of people set themselves in movement, become mobile, in order to be part of it. What used to be market places and resting places in earlier centuries have now become places for leisure and experience culture. As a result, sports, culture and urban tourism are developing into mass leisure mobility on the eve of the 21st century. With this mass movement in a society that was already always restless, there is now the additional element of a thirst for experiences moving into the foreground. There is a growing inclination to live for the moment. This “now-generation” revels in spontaneous, impulsive movement experiences. There is a growing desire to be constantly “on the road” and “in action”. Mass mobility is leading to the nomadisation of lifestyles, and experience sites are increasingly turning into gathering places for modern nomads - surrounded by an aura of restlessness and a transitory atmosphere (Packard 1973, Opaschowski 1998). Opaschowski further analyses this: *“Mobility turns out for many people to be an important elixir of life for bodily, spiritual and social needs. Anyone who would like to hinder this mobility, first has to answer the question: how to replace it and what with? Anyone who took such an elixir of life away from the people would have to give them something of equal value, otherwise the psycho-social consequences and resulting costs would be incalculable.”* Hautzinger finds that individuals are becoming ever more removed not only from the traditional social stratum and family circumstances, but also from religious constraints. One basic symptom of this is the number of single-person households. Instead of centring their lives on the family, people pursue a somewhat egocentric existence, oriented towards experience and enjoyment, that offers favourable preconditions for more leisure activities. Suburbanisation and the associated transition to the urban lifestyle again has a substantial influence on leisure and the number of leisure activities. From the sociological standpoint, the increase in leisure mobility is explained in the first place through more free time and more available income. At the same time, the developments in the transport sector are regretted, but it is noted that these developments result from structural changes, which again can be attributed to social and economic policy achievements. The other side of the equation, namely, the feedback to the transport system and its possibilities, on the other hand, is very often not taken into consideration.

Researchers concern themselves in this connection with the importance of the societal values, for example, the post-materialistic values -- adventure, excitement, variety -- as a necessary complement to the ever greater spread of the urban lifestyle.

In leisure activities outside the home there is a tendency for the destinations to be ever further away from the home -- a development that can also be seen in other travel destinations, for example, for work purposes. The reason for this lies in the growing speeds of transport modes and the lower costs of mechanised transport systems. With the same amount of time spent on mobility the field of action is expanding, which temporarily leads to qualitative gains in the leisure sector, which in the longer term will be overcompensated through weight of numbers. In other words, the transport system changes the structure and vice-versa.

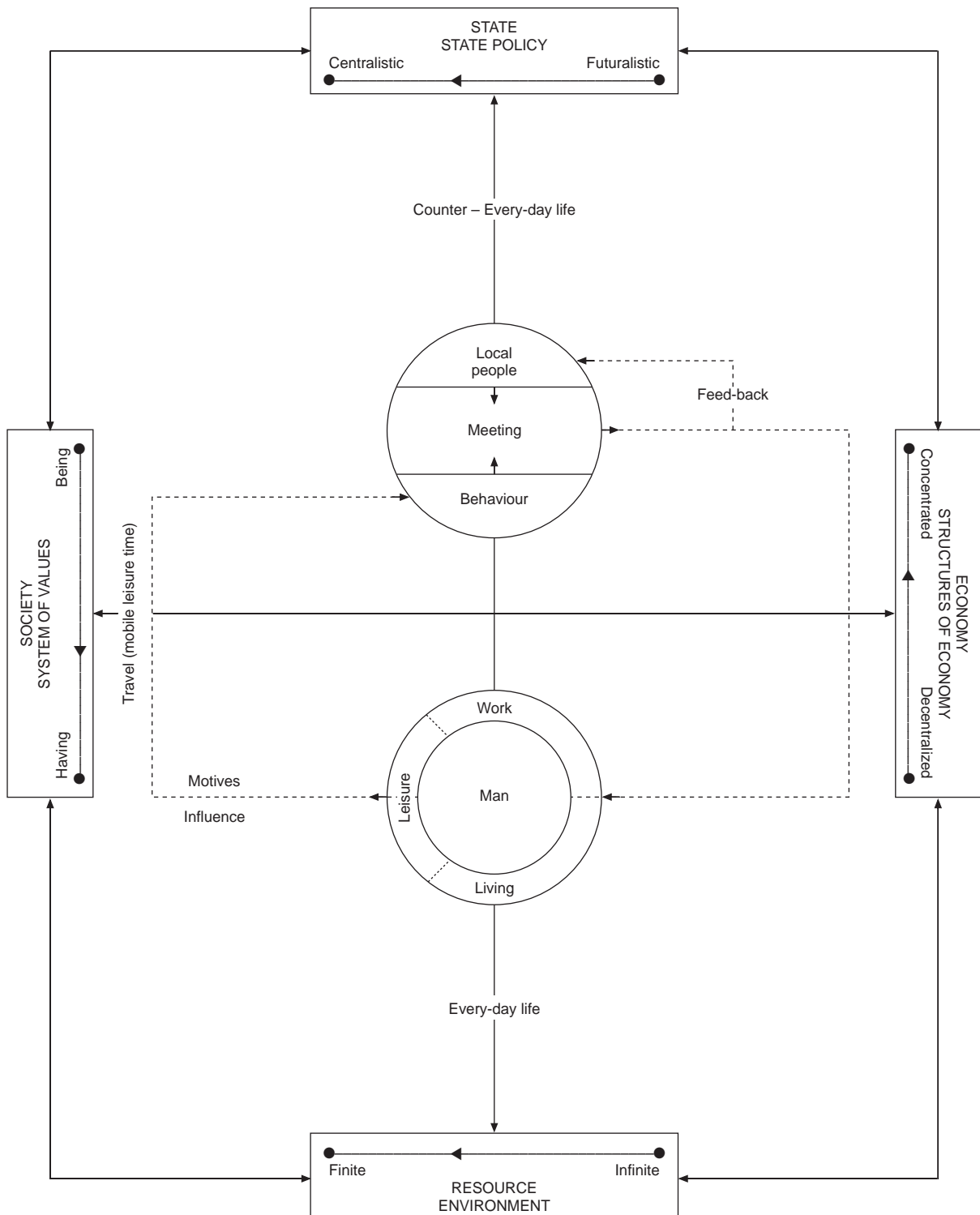
In the modal choice in leisure transport the individual modes, from walking to car use, account for a particularly high proportion. Even in countries with high car ownership rates, 40 to 50 per cent of all changes of location in leisure traffic are still partly by walking or cycling (Figure 4). The kilometres covered by these modes, however, only amount to 3 to 7 per cent of the total mobility in the leisure sector (misleadingly known as transport output). The rest of the kilometres are covered by motorised individual transport, 15 per cent by bus and train, 2 per cent by aircraft. Jost Krippendorf carries out a structural analysis in his book, *Die Freizeitmenschen* (The leisure people) and derives leisure traffic from the industrial society way of life: work-living-leisure-travel (Figure 5). "Boom factors" are specified in the Swiss tourism concept (Figure 6). Scientific and technical progress leads to four consequences: increased prosperity, urbanisation, car ownership and greater leisure, which, through socialisation, causes individual stress and hence compensatory tourism, resulting in long-distance travel, short breaks and excursions.

Figure 4. The growth potential for leisure trips by car depends on women and pensioners



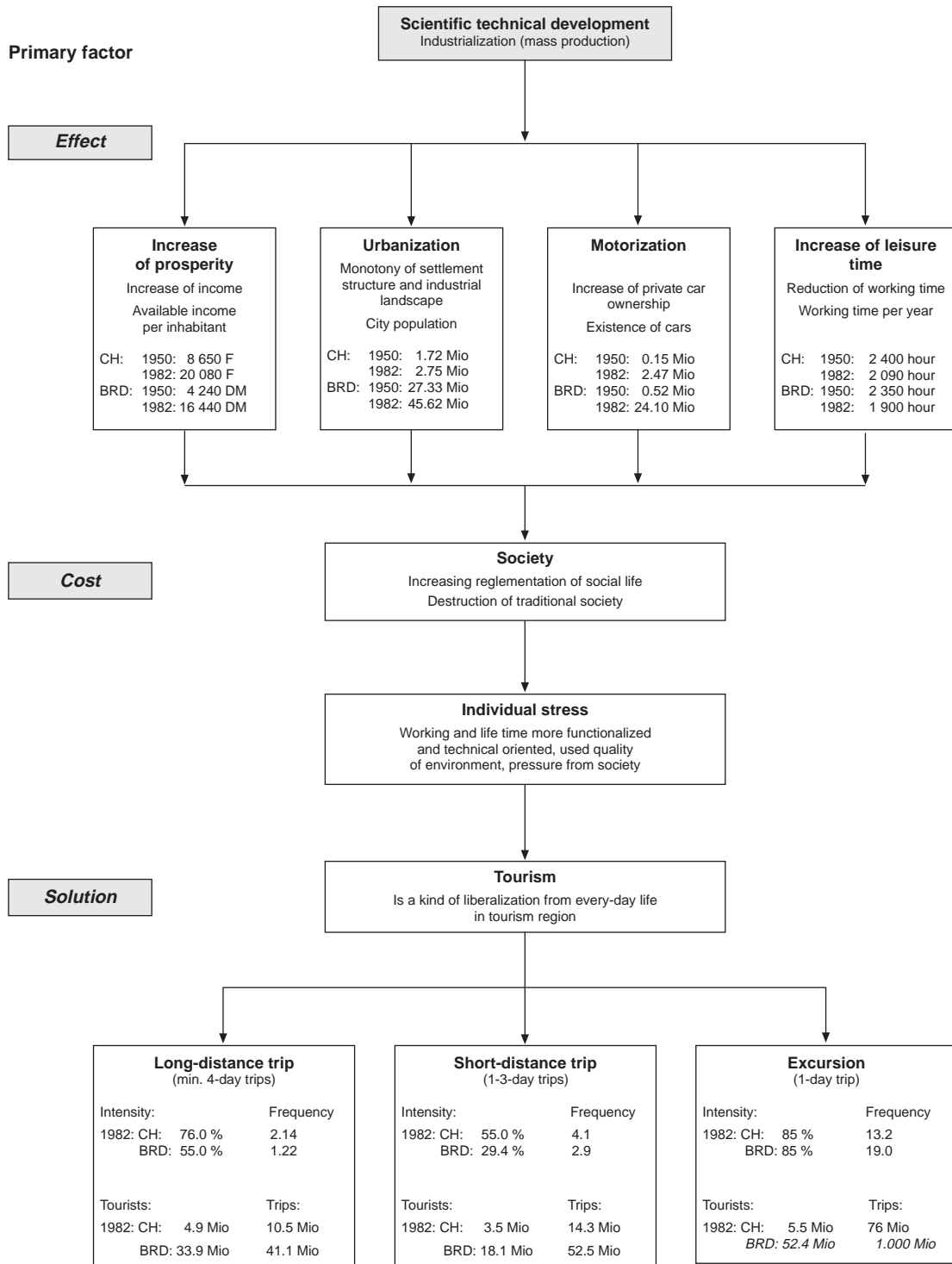
Source: Socialdata.

Figure 5. **Industrial society lifestyle**  
**Work – Living – Leisure – Travel**



Source: J. Krippendorf, 1984.

Figure 6. The tourism boom factors



Source: Krippendorf, J., 1984.

## **12. A PROBLEM WITH THE SUBJECT OF LEISURE AND MOBILITY: THE MULTI-LAYERED NATURE OF THE STRUCTURES**

The layered structure of our disciplines is organised according to the layered structure of our reality. But the working of technical transport systems takes no account of the structure of this layered world view. Transport acts as a longitudinal factor through all layers which makes communication between disciplines more difficult. Leisure and mobility can essentially be attributed to the presence of spatially separated potential differences, on the one hand and resistances between them on the other hand. These basic factors run through all the layers, but they have different labels. Transport studies use, to describe the system, what is known as the gravitation model, in which the potentials of the origins and destinations are multiplied by one another and divided by resistance quantity in the denominator. Potentials can work either positively, as attractors, or be perceived negatively, as needs. These potentials can be either real or virtual, with virtual attractors playing an enormous role in the leisure sector in particular, if we think, for example, of open-air concerts, sports events and so forth, in which the spectators present “really” see less of the actual performance than television viewers, but instead find the “community experience” in the mass (Elias Canetti, *Crowds and Power*). The potential difference results from the isolation and loneliness of an ever greater proportion of people, which forms the basis for event tourism.

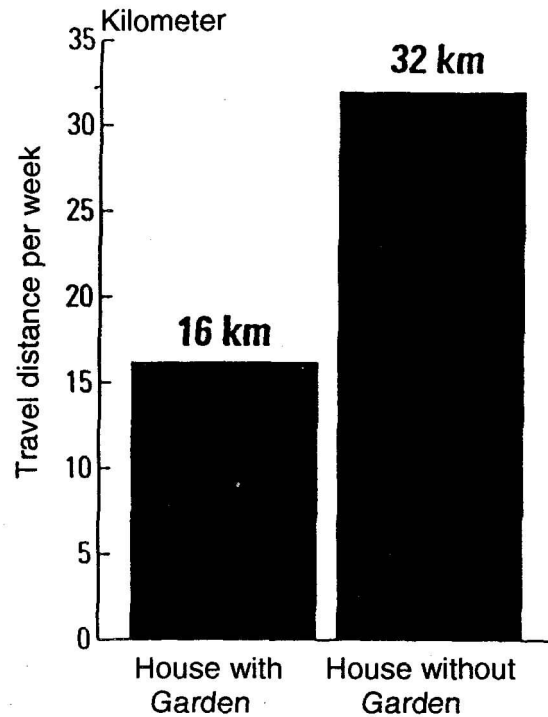
The potential difference in weekend tourism results partly from the inhospitable nature of our towns (Mitscherlich) and the overcoming of the resistance between the potential differences is massively encouraged by the relative reduction of travel costs in almost all fields (except the environmentally-friendly transport modes such as walking, cycling and public transport).

Potential at the origin, just as at the destination, can be both objective and subjective. Objective potentials are shortcomings in the living environment but also deficiencies of the most different kinds in the social milieu.

A nice house with a garden demonstrably produces less leisure traffic than one without a garden, as Holz-Rau (1997) has shown (Figure 7). Figure 8 shows that good provision with nearby recreational areas can substantially reduce energy consumption for leisure trips.

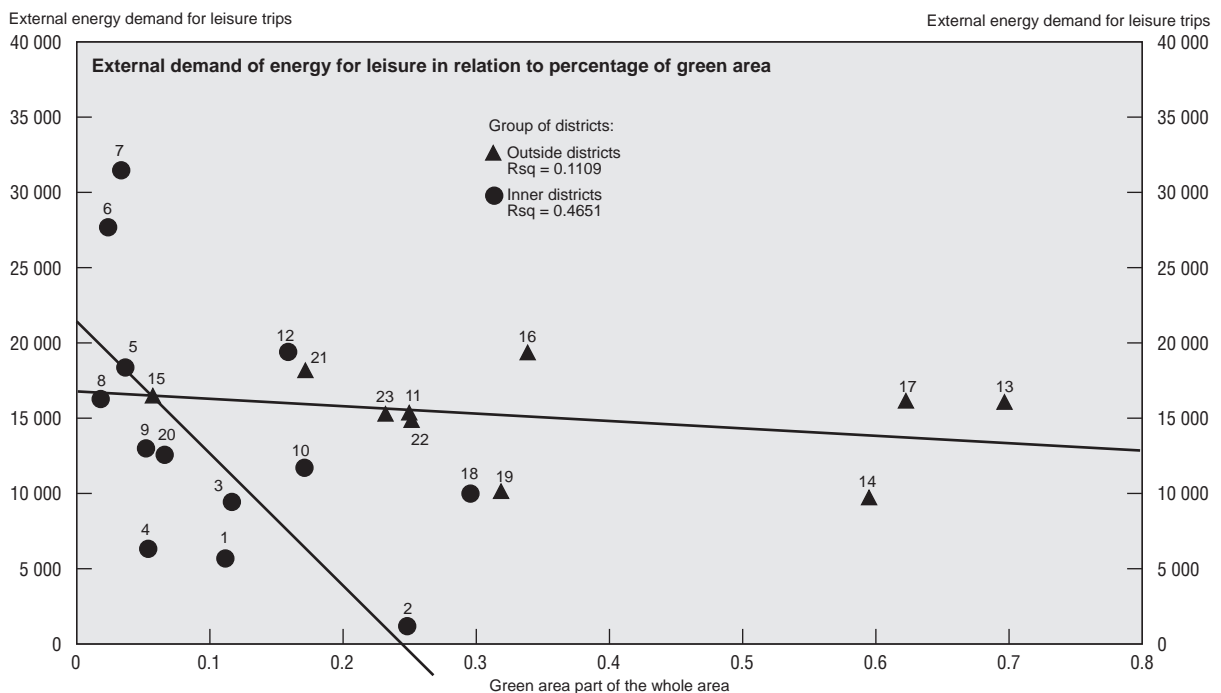


Figure 7. Pleasant living environment: little leisure traffic



Source: Holz-Rau.

Figure 8. Total external energy consumption minus external energy consumption for work with green spaces per total area



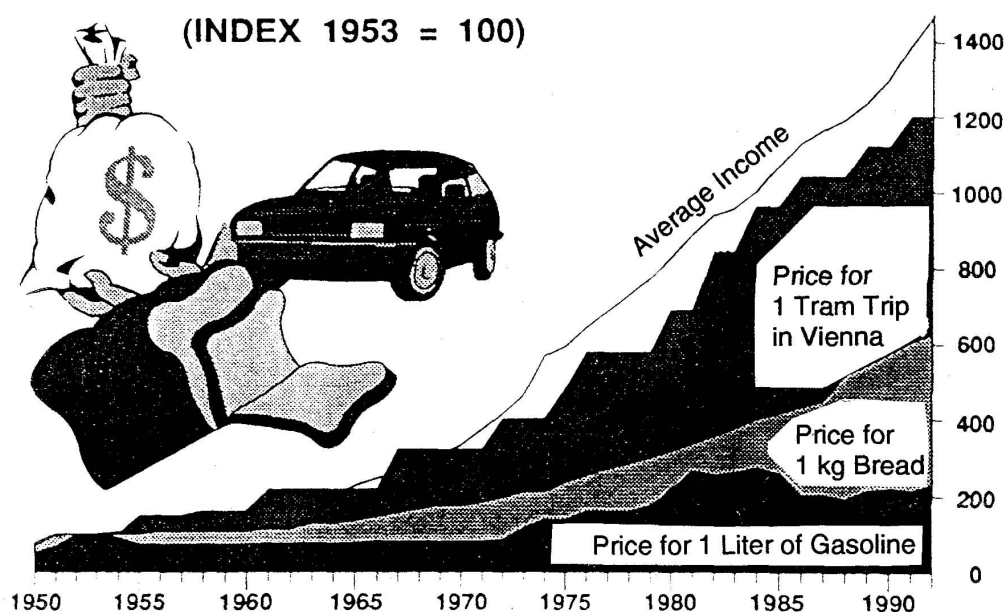
Source: H. Knoflacher, G. Emberger, 1995.

Potentials of this type are mainly described as negative potentials, or needs. Mitscherlich describes this as the inhospitable nature of towns, which, among other things, leads to the well-known mass escape at weekends. With leisure traffic, however, the subjective potentials of a partially virtual reality play an even more decisive role. Among these subjective potentials are value systems that undervalue the near and overvalue the distant and hence increase the number of clients for the tourist industry. Among the subjective potentials we thus have the subjectively produced urges to carry out specific activities at specific times in specific places and the overlooking of alternative leisure activities without high mobility requirements. Among the subjective urges there is a certain representational need "to have been there", in order to derive a sense of self-esteem that is not obtained in any other way, etc.

These negative potentials stand opposed to real or imagined positive potentials at the destination. Here, the information system as part of the transport system plays a decisive role and, with ever-renewed supply and ever-renewed representations of old supply, not only attempts to portray the reality at distant destinations, but suggests a quite specific form of virtual reality and hence creates the incentive for leisure mobility. A precondition for leisure mobility is thus this potential gradient or potential difference.

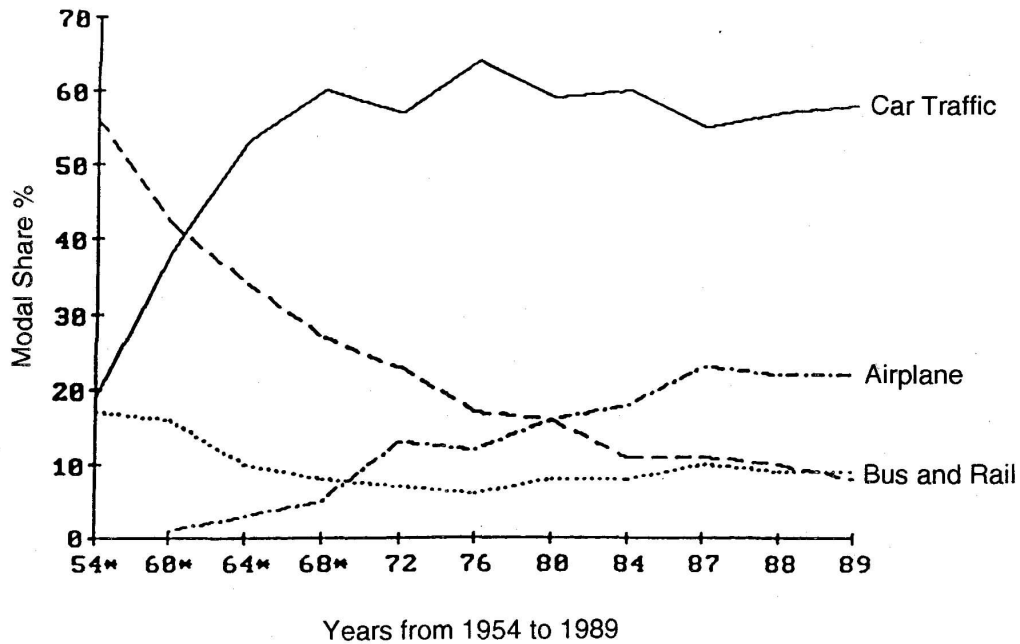
Opposing this is the resistance of having to overcome distance. So far as car travel is concerned and in so far as costs play a role as resistance function, this resistance has declined in relative terms over the past 40 years (Figure 9) (trend in the gasoline price). Since at most destinations parking is free, the cost of the car journey is, as a rule, perceived only as the fuel cost and the logical consequence has been a boom in car tourism for holidays over the past forty years, which is today increasingly challenged by a boom in air travel, thanks to the incredibly cheap offers available (Figures 10 and 11).

Figure 9. **GASOLINE CHEAPER THAN EVER!**  
Price trends for bread, gasoline and tram tickets 1950-1992



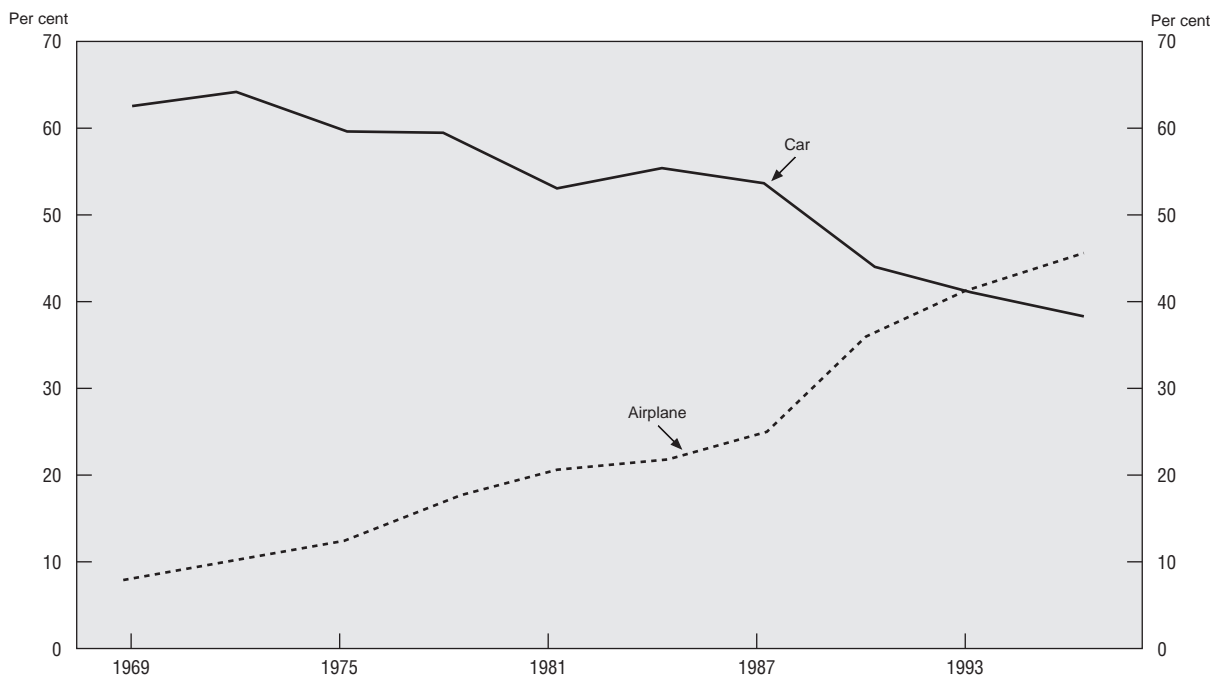
Source: ÖSTAT, AK.

Figure 10. Modal split in tourism



Source: DIVO Institute.

Figure 11. Air travel is No. 1 for holidays abroad



Graphic: Verkehrsclub Österreich, 1998.  
Source: ÖSTAT.

The reduction of the resistances to travel to distant destinations is to be seen essentially in three areas:

- a) The significantly reduced transport costs;
- b) The greater supply of information on long-distance travel in the different media, which leads to an increase in the potential of a number of relatively distant destination areas, with at the same time the neglect of supply in the local area (relative shift of potential); and
- c) Improvements in communications possibilities and in possibilities for the stay at the destination, through better service on the spot, the removal of language barriers, standardization of information systems, world-wide levelling of standards, so that people find ever more familiar things in ever more places, even very far away (globalisation of tourism).

Tourism runs ahead of or in parallel with the globalisation of labour.

Associated with the cost reduction, there is naturally a reduction in journey times due, on the one hand, to the higher speeds of transport systems and, on the other hand, to the removal of frontier and customs barriers, which is an equally important factor.

### **13. MODAL CHOICE**

The modal choice in tourism reflects the supply of individual transport modes even more than in the case of other travel purposes. Car travel has the following advantages:

- Lower costs to many destinations;
- More favourable journey times than public transport;
- An outstanding information system from origin to destination;
- Practically no enforced breaks in the journey, only voluntary ones;
- Particularly favourable for small groups and very convenient for their baggage;
- World-wide benefit from privileges such as free parking, outstanding service facilities, etc.;
- An on-board information system such as no other mode has.

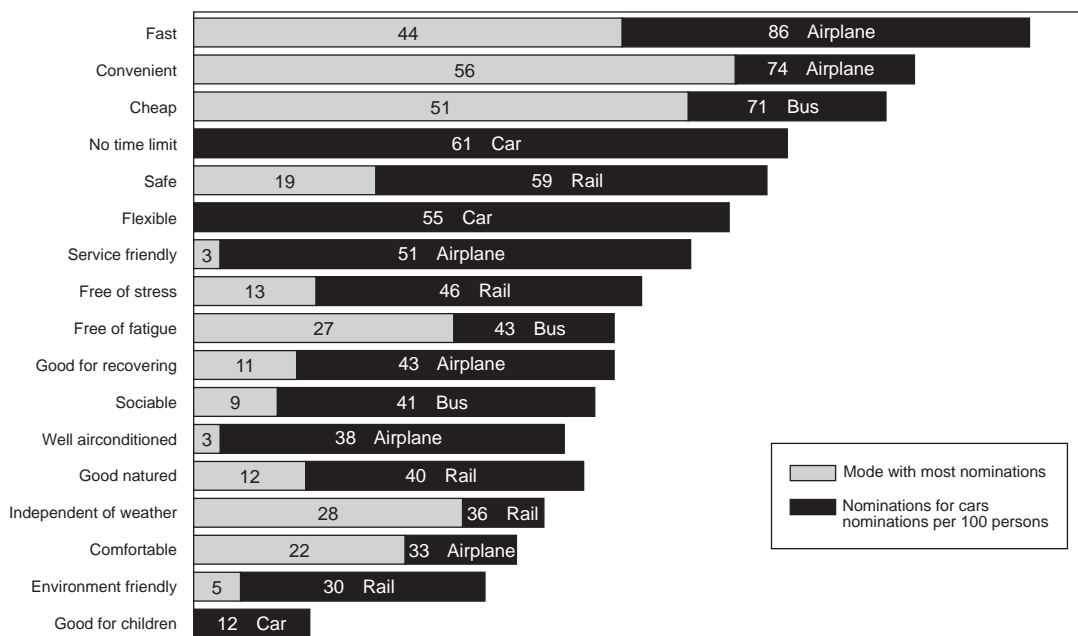
A substantial part of these service advantages are at the expense of the tourism industry and, above all, at the expense of other road users (subsidisation of car traffic). Public transport would have the advantage of carefree journeys, but today has many disadvantages that it did not have earlier:

- a) Relatively high prices, particularly for families;
- b) Inadequate information system;
- c) Frequently a deficient timetable supply (there are far fewer through carriages, with no changes between origin and destination, on the railways than there used to be);
- d) Deficient management through ignorance;
- e) Spatial splitting and also splitting between transport modes: different tickets are often needed for a journey in different areas, for different transport modes, etc.: no combined supply with a through fare;
- f) Deficient on-line information and inadequate information over connection possibilities;
- g) Often reduced operation precisely at times when there is more leisure traffic;

- h) Public transport still sticks very much to the view of traffic found in the classic transport studies -- commuting, shopping, services. Leisure traffic is in most cases either underestimated or forgotten;
- i) Lack of door-to-door service, problems with baggage handling.

Public transport's strength today lies to a certain extent in the relatively high speeds over many stretches, but this does not make it competitive over most links. Public transport is much more complex and, in its present organisational form (sectoral-national), is not suited to making a significant contribution to overcoming the problem of tourist traffic (Figure 12).

Figure 12. **The best transport mode for holidays**



Source: BAT/LBI.

Air transport has the big advantage of low cost, high speeds and short journey times, standardized procedures, a good information system and a world-wide booking system. Its disadvantages are: the problem of getting to and from airports, long waiting times and delays caused by weather conditions and technical hitches.

Advantages of walking: low costs, high potential for use in the local area, little damage to the environment. Disadvantages: often no or inadequate structures for walkers, ignorance about how to deal with this type of transport, which is important for tourism, lack of co-operation with other transport modes, general political underestimation of this mode.

In the case of cycle tourism, which is enjoying increasing popularity, high-quality infrastructures often still have to be created. A well-known example is the Danube cycle touring path, which attracts 8 000 and more people on summer days. The regional value of this slow type of mobility is substantially greater than the mainly one-off effect of leisure tourism using air transport. The average daily expenditure of the cycle tourist is estimated at over 150 DM.

Summarising, the public transport system therefore exhibits:

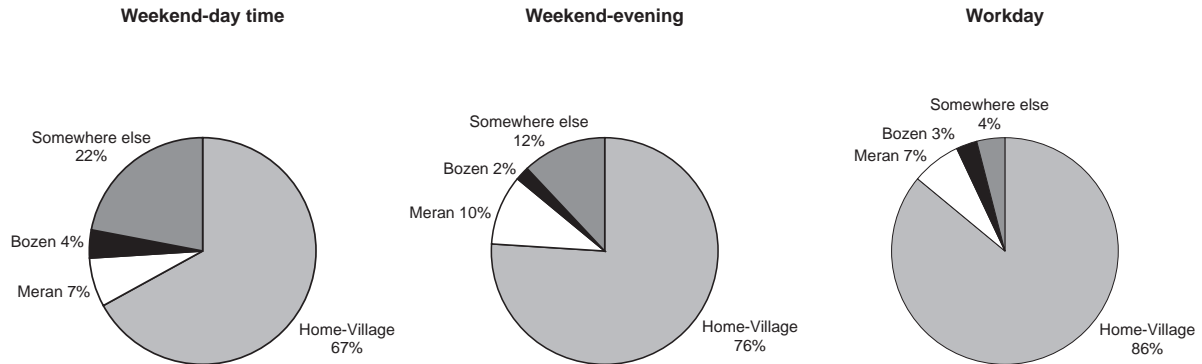
Objective and subjective shortcomings in the perceived potential for leisure activities, which are due to shortcomings in training, shortcomings in knowledge, shortcomings in advertising and also shortcomings or shifts in the value system. This is encouraged through continuous reductions in the resistances and a systematic increase in the potentials for long-distance mobility. This creates a positive spiral for growing mobility expenditure with mutually reinforcing effects.

The factors involved include the renunciation of balanced, people-oriented, residential and transport planning because the shortcomings of urban development are compensated through distant leisure mobility or because architects, town planners and also municipal administrations neglect to satisfy the leisure and tourism needs locally. The monofunctional urban development of the past sixty years has certainly been able to satisfy basic living requirements, but has seldom satisfied equally basic leisure requirements. The result is therefore growing leisure mobility.

#### **14. LEISURE MOBILITY - AN INDICATOR OF DEFICIENCY SYMPTOMS**

As is well-known, structural shortcomings have to be compensated through mobility. If people leave their home areas to seek jobs elsewhere, this proves that there is a lack of local jobs: the same applies in the case of shopping and leisure activities. The possibilities for compensation are limited, however. Neither climatic nor geographical disparities can be compensated for in this way. On the other hand, in everyday leisure mobility a great deal can be achieved. An example: a properly functioning living environment can keep people in it in their leisure time. Studies in South Tyrol show that a large proportion of the daily and also weekend leisure time is spent on the spot. An example from Meran is shown in Figure 13.

Figure 13. **Leisure time in South Tyrol – Burggrafenamt**



Source: H. Knoflacher, 1998.

## 15. BASIC ELEMENTS OF LEISURE AND TRANSPORT

There are essentially three basic elements that determine leisure traffic: supply, information and accessibility.

### 15.1. Supply

This supply is determined from outside as well as from inside. From outside through the opportunities for leisure activities and from inside through people's needs. If people in their other activities cannot be, have or do what they would like, nor interact in a way that suits them, then they seek to make good these shortcomings in leisure activities. If basic needs are not satisfied, and the increasing leisure activity demonstrates a growing deficit, then supply is relatively easy to find. If supply is lacking nearby, i.e. the appropriate potentials for qualitative and quantitative leisure possibilities, and with the mechanisation of our environment this is increasingly the case, people have to go to more distant places.

### 15.2. Information

Information plays a decisive role in leisure traffic. With it, existing potentials are aroused and new needs created. Travel agents' advertising brochures and products deliberately and in a targeted way build up needs for specific user groups. They do not express it like this, however, but take precisely the opposite approach, promising to satisfy needs through tourism.

### 15.3. Accessibility

The third decisive factor is accessibility, which is determined by financial and temporal limits. Spatial limits have today practically disappeared, thanks to the technical development of transport systems: by air it is possible to reach almost any point on earth within a quite acceptable time, if one is prepared to accept the strain of air travel. Here again, information plays a decisive role, so that a large proportion of those who book flights are even willing to rate as positive the most degrading part of the journey, i.e. being strapped in, force-fed and forcibly entertained.

This gives:

Leisure traffic =

<b>(Supply)</b>	<b>(Information)</b>	<b>(Accessibility)</b>
negative or positive potential need	arousing or creation of needs	financial, temporal, technical possibilities.

Through the urbanisation of society, the economic framework conditions of our production and working processes and the loss of social links, going as far as the break-up of the family, the potential for unsatisfied needs is constantly rising.

Today's information systems, half-way along the development of their possibilities, are optimally used by suppliers to maximise travel activities. There is no counterweight in education, training or the local environment.

Lastly, the third factor, accessibility, has grown enormously in recent decades, on the one hand through the greater prosperity of a large part of the population while, on the other hand, the overcoming of distance has become relatively ever cheaper, particularly with the car (Figure 9, Gasoline price trend). The upgrading of transport infrastructures has led to higher speeds and hence greater travel distances. In air transport there are incredibly cheap offers for long-distance flights, making practically the whole world accessible for broad sections of the prosperous population of the North.

## 16. SYSTEM ANALYSIS

In studying the topic of leisure and transport, it is a matter of analysing the behaviour of broad sections of the population. This behaviour is reflected in data, many examples of which are to be found in this paper. The reasons for the behaviours reflected in the data are, however, structures that need to be analysed because they shape the behaviour. The needs profiles as determined by surveys, such as the reasons for the trip and holiday activities of Austrians and Germans, show that clearly the most important thing in the holiday is regeneration, followed by staying in a place close to nature, interest in further education and culture and social contacts, very much in evidence in surveys of German holidaymakers in particular.

The modal choice for holiday journeys is determined by the structures.



Clearly, but seemingly paradoxically, at the holiday place the transport mode most often used to get there is perceived as a particular nuisance.

The structures that are lacking from this desired profile today in Europe are clearly identifiable:

1. The lack of closeness to nature at home as a result of urbanisation;
2. A mechanised environment in most monofunctional residential areas, both at home and at work;
3. Environmental pollution through exhaust gases and noise;
4. Growing social isolation due to the monofunctional nature of housing estates;
5. An obvious lack of time and opportunity for access to culture and nature in everyday life for the large numbers of people who mention these factors in the profile surveys.

There are thus at least five levels of structural shortcomings in present-day society, which reinforce one another and hence trigger the leisure mobility that has now become a problem.

## **17. APPROACHES TO SOLVING THE LEISURE AND MOBILITY PROBLEMS**

1. The development of leisure mobility was too rapid and found society unprepared.
2. In earlier centuries only very restricted circles had sufficient leisure and they were mostly well-prepared at that time:
  - through active and passive participation in cultural activities;
  - through appropriate integration in the leisure society of their social stratum;
  - through the exercise of the sports of the time;
  - through having sufficient capital, so that it can be assumed that in these circles (mainly of nobles) a corresponding leisure culture existed.

The implications of the technical, societal and social development of the 20th century on the development of leisure was probably not realised soon enough, neither by families, nor by educational institutions or governments. Every increase in leisure was perceived as positive and hailed as a social achievement. However, for the most part, there has been no active debate about the growing free time in our societies. Television now occupies a substantial part of the leisure of broad sections of the population and is also capable of keeping a not insignificant number of people at home, thus reducing leisure mobility. At the same time, however, television exacerbates the phenomenon of social isolation, which again inevitably leads to leisure mobility in order to make social contacts.

School curricula have changed in the direction of optimal preparation for a career at the cost of a more rounded education, cultural openness and contemplation. The school as a place of culture, a place for learning how to live responsibly, has been ousted in favour of a place for optimal preparation for commercial and vocational life - man as a tool in the work process.

In the field of work there has been a process through which an ever greater proportion of what used to be satisfying activities have been taken over by machines and people have been reduced to an unsatisfying position of control, in particular control over other people and over parts of the production process. In the so-called tertiary sector in particular, a substantial potential of unrealised

activities can be demonstrated. The links with nature in life and the world of work have been lost and are now being increasingly neglected in favour of a technical environment which offers favourable preconditions for the storage and activities of machines.

The close links of society and social functions have become anonymous and commercialised. The ability to organise certain processes from beginning to end oneself, to be able to participate in the success or failure through one's own doing, was in a very short time mechanised, so that there is an enormous potential of unsatisfied needs in the subconscious. Thus ideal preconditions are created for using information systems to make supply attractive, telling people that in their leisure time they can experience what is otherwise missing in their lives. This means that the enormous leisure mobility that is seen today in most countries is an indicator of the shortcomings in all other aspects of life. The leisure society is thus increasingly following the paths of the consumer society, with growing convenience and dependence and, at the same time, commercialisation.

The antiquated and misleading position of the transport system, which is to try to satisfy demand rather than trying to understand how demand can be influenced, encourages this development still further through the extension of infrastructures in any direction where a rising demand trend can be seen. This has already led in many areas to the limits of ecological and social sustainability being exceeded.

Many-layered as the problem thus appears, there are basically only the following four starting points for change:

1. Potentials at the place of origin;
2. Potentials at the destination;
3. Resistances along the way;
4. The information system.

The basic principle for a solution, when it comes to trying to change the behaviour patterns of the population, is that the effort must be concentrated on the factors that condition these behaviour patterns. Behaviour patterns are the result of structures. The existing problem of mass leisure mobility is the result of the existing structures. If we do not succeed in changing the structures, we shall not succeed in solving the problem. The structures at places of origin, in particular in the growing conurbations, are well known and are both the cause and the effect of the modern transport system. The greater distances now possible with the same time budget have led to a decline in the art of urban building and town planning, because all the shortcomings of architectonics and urban structures can be compensated for through mobility. The main shortcomings obviously lie in the leisure sector, which neither transport research, nor urban planning, nor the other disciplines have sufficiently studied.

At the destinations, there has been investment in structures mainly aimed at quantitative growth, so that in many cases the limits that represent an optimum for particular tourism regions have already been passed and there is an overloading of the tourist activities, leading to a deterioration in quality. This applies to both winter and summer resorts. One of the limits that appears ever more clearly here is the ecological sustainability of the system, a factor which was not taken into account for a long time, so that there are now appearing ever clearer indications of overloading, with all its negative effects, and not only in the Mediterranean area. In the Alpine regions too, there are ever clearer signs that the limits of social and ecological sustainability have been exceeded (Krippendorf, Glauber, 1989, *Für einen anderen Tourismus*).

In the transport system, the negative symptoms of tourism have been visible for a long time.

Some transport infrastructures reach their limits or are overloaded almost exclusively in peak tourism periods (Figures 2a, 2b). The populations of the very often tourist regions along main traffic routes are no longer prepared to accept the pollution caused by transit traffic. While three decades ago there was still a willingness to create relief routes to ease capacity bottlenecks, the situation has now completely changed. Concepts from that time, when attempts were made to avoid congestion by introducing diversions through the secondary road network when the motorways were overloaded, are no longer accepted today by either politicians or residents. Tourist regions protect themselves today by trying to shield their transport infrastructures against transit traffic. Tailbacks on motorways are therefore no longer a reason for urgent deviation measures or capacity extension work. Here, the country is learning from the experience of the towns, where already some decades ago it was realised that an inadequate traffic capacity was by no means a catastrophe, but rather a necessary regulating measure to stabilize the system.

In the field of public transport, there are certainly approaches to the mastery of peak traffics, but there is a lack of both experience and suitable management for bringing about any major changes in modal choice. The current trend in the European Union towards the privatisation and decentralisation of public transport, is making co-ordinated action in the present phase much more difficult and has already had negative effects on many perfectly well-functioning structures. In public transport there is a lack of suitable innovations, even though in several countries attempts are being made, through changes in the tariff system, to shift leisure mobility to the railways, for example.

There is a serious gap in the regions regarding awareness of the possibility of controlling motorised private traffic by means of parking management. So long as free parking is provided, the car will go on playing an increasing role in tourism. Only if tourism resorts to the type of measures that are effective in the towns, namely, active parking place management and a parking place policy, can there be any prospect of a solution. Tourists certainly travel to their chosen destination by car, but once there they use their vehicles very little. They prefer to walk or take public transport. So long as tourism managers are not clear that it is a matter of people who come on holiday and want to enjoy their leisure and not a matter of vehicles, there will be little progress in this field: what they should do is minimise the parking facilities in order to enhance the conditions for tourism and leisure activities. Tourism managers base their behaviour as a rule on the behaviour of the guests. Because they do not drive cars themselves, they make interventions in this system taboo.

## **18. THE INFORMATION SYSTEM, EDUCATION**

In the same way as the development of industry led to the consumer society, leisure is now being “consumed”. This means that leisure is now not so much a matter of the individual’s own initiative, as a passive form of regeneration through consuming what is supplied. Since the expectations are limitless, no restrictive measures are to be expected from this sector. Only through the experience of the consumers can a limiting factor arise. Here, there is basically a lack of education: the education and information systems and the media have developed increasingly into a preparation system for work processes and scarcely moved at all in the direction of helping people to manage their leisure better. Thus future generations will no longer be equipped for broad aspects of life, but rather prepared primarily for their useful function in a specific branch of the economy. The fields of education necessary for the active, lively and structured use of leisure are lacking or have been removed from the syllabus. The world view of upcoming generations will be adapted to the capitalistic utility society and hence leisure consumption and leisure mobility. Instead of discovering

attractions in the neighbourhood, in contemplation and in the environment, their eyes will be directed towards the far-distance, to consumption and to illusory satisfactions, without there being an appropriate counterweight.

## 19. COUNTER-MEASURES

Because of the difficulty of finding solutions to the transport system problems that have arisen in the leisure and tourism field, counter-measures need to be introduced at all levels.

How beautiful, for example, Professor Opaschowski's "Ten Commandments for the 21st Century" sound:

1. *Do not stick at it all the time, switch off;*
2. *Do not constantly chase after short-lived trends;*
3. *Buy only what you really want and make your personal well-being the most important criterion for purchase;*
4. *Do not permanently try to improve your standard of living nor confuse it with quality of life;*
5. *Learn to put things aside, leave out the superfluous: better to miss something now and again than to always be there;*
6. *Rediscover the hammock, learn to do each thing in its own time again;*
7. *Enjoy in moderation, so that you can enjoy for longer;*
8. *Do not make all your dreams come true, always keep some unfulfilled wishes;*
9. *Do nothing at the expense of others or to the detriment of future generations: always take care that life will be worth living for future generations;*
10. *Earn your quality of life -- through work or through good works: there is nothing worthwhile without it.*

These recommendations, mainly set out in the "Sermon on the Mount", concern above all the highest level of our evolutionary development and are generally perceived as positive, or even as rousing. Their effect is nevertheless doubtful so long as the structures from the lower levels work against them. These recommendations will perhaps, after a few million years of further positive human development, achieve the status that one would like today. For the people of today, however, who are developing ever more away from the community towards egotism, and are forced in this direction by all the structures, the chances for improvement can only arise if the fundamental information (education) and financial structures are changed in such a way as to provide different framework conditions for human action. If people are to deal responsibly with leisure and mobility, we must first learn how to properly train those who consume or want to enjoy leisure and mobility. In addition, those who create structures in the environment must first learn in what form and how to organise leisure and mobility in such a way that it causes the least possible harm to future generations. Here, there is a lack of training in the universities, in urban development, in housing estate planning and in tourism planning.

Just how difficult it is, in the development of tourist centres, to respect responsible limits to growth is shown by cases like that of Kleiner Walsertal, where the problem was certainly recognised, but unfortunately the population did not agree to respect ecological limits and thus ensure long-term, sustainable operation. Similar tendencies are also to be found in certain Austrian regions, where people are more inclined to give preference to the car rather than to a future-oriented, sustainable tourism development (area around Schladmig, Bad Aussee). The prospect of success is present where the politicians do their job and set limits that must not be exceeded. A change of behaviour in tourism is possible only through structural changes. To overcome the problems created by present-day tourism, measures are necessary not only in the transport system, but also at the starting point and at the destination.

At the starting point, the main source of tourism, a fundamental change in the planning of residential areas and urban development can, in the longer term, partly reduce the potential for long-distance mobility. A kind of urban development that takes more account of the leisure needs of society can help shift mobility from more distant to local areas. Just how modest the mobility expenditure for leisure mobility can be is shown by good examples from places like the South Tyrol (Burggrafenamt, Table 2). Tourism regions are trying already today to separate tourists from their vehicles, so that they can provide more favourable arrangements for public transport users and for cyclists. This thus involves an attractive public transport supply in tourism regions. An example is South Tyrol, where there is public transport with electronic payment, so organised that the price falls with frequency of use, something tourists are happy to note. Car-free tourism regions are enjoying ever greater popularity and are setting a new standard for quality tourism. Its extension to other areas is necessary, however, in order to develop high quality logistic chains for leisure traffic from source to destination without the car. In addition to the structural changes in the source and destination areas, further measures are required in the transport system. These include, on the one hand, an attractive public transport supply and, on the other hand, a market-economy-oriented control mechanism for the roads. As with all scarce goods, appropriate control can be achieved in the market economy through price signals. Flexible road pricing, which charges substantially higher tariffs at peak periods, can, on the one hand, lead to a change in modal choice and, on the other hand, to a temporal shift of flows and hence more rational capacity utilisation of the transport infrastructures. Corresponding flexibility in the pricing of other transport facilities will therefore be necessary. At present, there is a completely absurd situation in which, for example, the Austrian Railways, even though they could attract substantially more business by increasing the supply, charge higher prices at peak periods for car-carrying passenger trains, for example, than in the intervening periods. This is absolutely counter-productive for a future-oriented solution to tourist traffic problems.

Table 2. **Leisure trips**

<b>Village</b>	<b>Distance (km)</b>	<b>Time (minutes)</b>	<b>Speed (kph)</b>
Meran	2.0	24.4	8.8
Algund	7.2	20.0	16.8
Dorf Tirol	5.1	18.0	14.2
Hafling	11.0	26.0	23.7
Keuns	6.0	21.0	17.7
Marling	8.0	20.0	18.0
Moos	9.9	27.0	17.3
Riffian	6.2	19.0	17.1
Schenna	6.4	19.0	18.6
St. Leonhard	8.4	24.0	17.6
St. Martin	7.1	20.0	15.4
Tscherms	6.9	20.0	18.1
Vöran	12.1	26.0	22.9

*Source:* H. Knoflacher, 1998.

A pan-European information service for tourists should be set up, informing them about the present price situation of the different transport facilities, so that they can make the modal choice decision flexibly and in good time. In leisure transport, there should be many possibilities for using information systems more intelligently than has so far been done. The transport system has been, to a large extent, excluded from the market economy. While hotels systematically charge season-dependent prices, tariffs on the roads are independent of seasonal variations in utilisation. The price signals for users are therefore wrong and thus encourage the wrong behaviour. The aim must be to achieve a sensible balance in the system, which means in all fields, not just in the transport system.

## **ADDENDUM**

### **Data on tourism are the result of society's behaviour patterns**

The behaviour patterns of society itself are in turn the result of structures. These structures include variables which are not influenced by man but play a major role, particularly in tourism. Such variables are geographical and climatic differences, the landscape and to some extent ecosystems, meaning the fauna and flora. At the same time, there are many structures which are created or influenced by man, such as the transport system, the tax system, the organisation of tourism, the information system inasmuch as it concerns tourism and the various social and cultural structures. Some of these structures are easy and others more difficult to modify. Owing to the rapid development of technical systems, society has created many structures whose impact has not been perceived at all, let alone understood. These include, in particular, the new urban structures as well as transport system structures. With the increased range of cars, town planners forgot that they would also have to take into account leisure needs in their projects for new urban areas. These basic needs can no longer be met in the vicinity, as car parks have been built instead of recreational areas. If leisure and mobility are therefore to be developed on a sustainable basis in the medium or long term, more possibilities of recreational activities will have to be created within existing urban structures, and it must be ensured that such possibilities are planned from the outset when new urban structures are being set up.

As a result of low air and road transport prices, combined with high travel speeds, traffic volume (passenger-km performed) has risen at an exponential rate precisely in tourism. No limits are to be seen at present. If limits are to be set for ecological, cultural or social reasons, prices and speeds must be modified. An appropriate tax on the price of fuel, which is too low in the case of aircraft, as well as a charge on road vehicle traffic based on the distance covered, would be the first steps in this direction. Tourism does not only benefit from transport, but may also be adversely affected by emissions from transport vehicles. If the disamenities in certain regions continue, as has long been the case in the Alps, where noise and emission values are considerably higher than tourists are prepared to accept, the impact on tourism will be negative. Duration of stay will decline and even the number of visitors may decrease substantially.

An important future task in leisure time management would be to provide for ways of life during leisure periods that are also desirable outside such periods. For this reason, car-free tourist resorts play an important role and should be given full support, so that they will not be seen merely as tourist areas but also as autonomous living and working environments that provide an answer to today's problems.

It is essential that decisionmakers realise that an increasing volume of tourist traffic is a reliable indicator of growing disparities between origin and destination points. In other words, growing mobility must be seen by policymakers as an alarm signal pointing to the need for decisive changes at the origin and destination points of these traffic flows, so that disparities can be kept within

reasonable, sustainable limits. Whenever users are given the wrong signals by policy, technical and economic structures, they behave in the wrong way. Although the symptoms are becoming most apparent in continuous transport, it does not provide the approach to a solution.

Controlled access to parked vehicles is one of the key issues which will assume considerable importance at both the starting and destination points in the future. In other words, stationary vehicles play an important role in tourism management. This necessarily involves new responsibilities for public transport.

The present situation is marked by the fact that, despite intensive research on numerous aspects of tourism, little research material is available on many areas in which tourism is considered in its interrelation with urban structures and transport systems. Mobility is still misunderstood. Mobility is very often seen in isolation from the potential which is the prerequisite for any kind of mobility. As stated above, this mistake has led to a situation in which a tremendous potential for leisure mobility -- resulting in today's vastly increasing demand for mobility -- has developed obviously as a result of shortcomings in town planning and in transport facilities.

For the future, it can be assumed that leisure mobility in terms of the number of movements can hardly be reduced, whereas the volume of passenger-km involving leisure mobility can be cut considerably. This can be done by providing attractive, local recreational facilities, by implementing those measures by means of which the development of mechanical mobility can be brought back under control, as well as by taking action on parking facilities and on the cost structures of transport by air and by car. Behaviour is modified if the structures are modified. A further aspect which is continually overlooked is that society should be encouraged, through education and information, to use leisure time in an appropriate way. At present, this is to a large extent left to chance and is in no way a national objective in education policy for adults and children. What is lacking, so to speak, is a mature user of local recreational facilities and those available worldwide.

Carriers play a decisive part in the leisure business. Along with tourism offices, they now select as attractions those destinations that enable them, for example, to make the most of their aircraft for night charter flights. In other words, the passenger is thus becoming a means to an end, since price barriers on both international and charter flights have been practically eliminated.

The demand for leisure mobility on roads has become so great that the most serious congestion occurs in the holiday period. In this case, a basic change from the viewpoint of the regions visited can be seen. Formerly, the attitude to those in transit was one of understanding and an effort was made to facilitate the traffic flow by diverting traffic. This is now being done by advanced telecommunications systems so that drivers need not use heavily congested routes. But in highly developed tourism regions, this approach has long been seen as a mistake. In order to maintain the quality of life for the population and local tourists, every possibility is used to prevent lorry drivers who are blocked in motorway tailbacks from using the secondary road network. As diversion routes are being increasingly rejected in the Alpine region, all the telecommunications facilities providing lorry drivers with faster routes off the main roads are becoming an absurdity, not only on ecological grounds but also for reasons connected with the protection of tourism. This should also become a basic transport policy concern at international level: the protection of the local living environment for inhabitants and tourists must have priority over leisure mobility.



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FRANCE

**Françoise POTIER**  
**Institut National de Recherche sur les Transports et leur Sécurité**  
**Arcueil**  
**France**



# TRENDS IN TOURISM AND INTERNATIONAL FLOWS IN EUROPE

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## INTRODUCTION

International tourist arrivals worldwide totalled 60 million in 1960, 286 million in 1980 and 592 million in 1996, according to World Tourism Organization (WTO) estimates. Europe, the leading world market for international tourism, accounted for 60 per cent of all arrivals.

Tourism has become an economic force in Europe. Its market has grown substantially, its targets have diversified and its products have been aimed at satisfying the expectations of new publics, or “creating” new demand, through innovation. In some regions of Europe, the standard of amenities and service that tourism requires has made it a powerful factor in the location decisions of business and new industry.

This dramatic increase in tourist flows is based on changes in behaviour patterns: Europeans are travelling more often, for shorter periods. Instead of a month-long vacation in the same place, they are taking shorter breaks in different places throughout the year. The consequences of these changes in tourism patterns have been multiple: a drop in number of nights in accommodation, but also an increase in road, air and rail traffic and greater concentrations of flows in tourist areas.

International tourist travel may still account for only a relatively small share of European mobility, but in terms of turnover it generates enormous revenues, which are shared among the transport, hotel, retail and general entertainment sectors.

In Europe, earnings related to international travel (transport and accommodation) accounted for an estimated 1.9 per cent of GDP and as much as 4 per cent in Spain and Greece, 5 per cent in Portugal and 7 per cent in Austria. They also accounted for 15 to 25 per cent of foreign exchange earnings in Spain, Portugal, Greece and Austria (OECD, 1994). Lastly, they generate a lot of jobs, an estimated 10 per cent of jobs in Europe, according to the World Travel and Tourism Council (WTTC) and the International Labour Office (ILO). Despite this, very few governments recognise the economic and social importance of tourism.

The importance of tourism for the economy and for building a European identity and the problems that it poses for transport networks call for an in-depth understanding of tourism demand patterns and associated mobility.

We first give an overview of the problems inherent in the field of tourism, the available sources, the concepts behind them, the degree of international consistency and accessibility. We conclude that, for our purposes -- assessing transport demand -- the best source is currently produced by European Travel Monitor (ETM), which has been conducting repeat surveys on the international mobility of Europeans in EU and EFTA countries since 1988. The results of this survey demonstrate the importance of international flows.

Chapter 2 of this paper discusses the factors determining tourism trends in Europe.

Chapter 3 analyses outbound flows by Europeans (origin-destination, modes, reasons, time distribution, etc.), flow trends and the demographic and economic determinants of mobility, taking account of explanatory factors such as age, sex, household composition and income.

In Chapter 4, we go on to analyse variations in international mobility in the countries of Europe, demonstrating that, of all mobility behaviour, international mobility is the one that most differentiates one country from another. We propose a classification of the various countries in this light.

## **1. AN IMPORTANT FIELD THAT RESISTS DEFINITION**

The growth in international tourism is causing numerous upheavals of all kinds, principally: economic -- the location of new sectors of production in tourist regions; geographic -- the construction of major infrastructure leaves its mark on the environment; and socio-cultural -- complex and sometimes conflicting relationships arise between tourists and local people. How will these trends develop over the next few years? This is difficult to predict, especially as there are fashions in tourism. More importantly, because of the many uncertainties in tourism and leisure, it is a hard field to describe.

### **1.1. Serious epistemological problems**

The main problem in analysing the current non-daily travel market and particularly the development of that market, is the lack of reliable statistics. Several problems call for comment.

- *Problems of description and data gathering.* Non-daily travel is random, varied, complex and less frequent than utilitarian travel. To get an accurate picture of it, survey time-frames have to be long. This poses problems of costs, memory and stable typology.
- *Conceptual and semantic problems.* The relative lack of awareness of the importance of tourism can also be attributed to the imprecision of the terms used and their definitions. The field covered by tourism and leisure more generally, is hard to plot precisely. This is a pleasure-motivated field and the travel it generates is not as easy to fit into a socioeconomic equation as travel for work, shopping and services relating to daily life. Some business trips are also classified in the tourist travel category; how can motivations as different as business and pleasure be compared? Interaction with the environment is complex. Exceptions rule out any easy generalisations.
- The time patterns of tourist travel are also complex, less dictated by the obvious routines of daily life. Even the concept of the “weekend” is not as simple as it first seems.
- *Economic and geopolitical uncertainties.* The supply side plays a much more powerful role than in non-tourist travel; fare and advertising “incentives”, etc., all play a part in shaping behaviour.

Lastly, geopolitical factors can hit the entire sector and in just a few days can wipe out painstaking efforts to foster the desire to travel or to get away from it all, by its nature fragile, as we saw with the Gulf War and the terrorist attacks in Paris and Egypt.

## **1.2. Definitions, concepts and sources**

In the European Union, where comparative statistics for Member States and businesses are considered a daily necessity, the current state of statistical data-gathering on international tourist flows is unsatisfactory<sup>1</sup>.

International statistics published by the OECD and WTO are based on records of tourist flows kept by individual countries. Their primary aim is to evaluate the business that foreign visitors generate in each country (particularly in the hotel industry). They are not totally standardized, partly because national data collection traditions persist, partly because of difficulties in defining tourism. For instance, some countries include excursionists<sup>2</sup>, some exclude them, some have no limit on distances, others set a lower limit of 80, 100 or 400 km.

Lastly, some countries (including France) conduct regular “border surveys”, i.e. detailed surveys classifying flows at land, air and sea borders. These are very valuable tools for the national authorities, but they are neither standard from one country to another nor carried out by all countries.

Not all international flows are of equal interest for our primary purpose: flows generated by cross-border workers are routine, short-distance flows, outside the scope of this paper. We will also exclude international excursion flows (people not spending a night in the foreign country they are visiting) because the vast majority of them are short-distance trips either side of a border<sup>3</sup>.

We will also disregard same-day international business travel (not necessarily short-distance trips) and some long-haul trips that do not involve an overnight stay in the destination country: for example, trips from Germany to Italy via Switzerland or from northern Europe to Spain via France.

We will focus on international tourism, as defined by the WTO<sup>4</sup>: visit to a country outside the country of residence for less than one year, for a main purpose other than the exercise of an activity remunerated from within the place visited, involving a stay of at least one night. It should be noted that tourism is not just confined to vacation trips: it also includes business travel (business, working meetings, fairs, exhibitions, conferences and incentive trips), visits to friends and relatives (VFR) and for leisure and cultural purposes (more typical of tourist travel in the ordinary sense of the term). The latter are further divided into short breaks (one to three nights away from home) and vacations (at least four consecutive nights away from home).

This is the definition (trips abroad with at least one night spent in the country visited) used by the European Travel Monitor (ETM) for the survey that it has been conducting since 1998 on a representative sample of the population aged 15 years and over in EU and EFTA<sup>5</sup> countries. In all, 250 000 people per year are interviewed in six separate cycles, each of which covers outbound international travel in the preceding two months.

Except where otherwise specified, the statistics used here are taken from the survey, since its major advantages (suitability for our purposes and uniformity of source) far outweigh its drawbacks (it does not cover same-day business trips or transit flows).



### 1.3. Europe, the world's leading market for international travel

According to ETM estimates, international trips by EU and EFTA residents totalled 206 million (or almost 2 billion nights spent abroad) in 1995, representing total spending (transport, accommodation) of ECU 150 billion. This spending total may seem low, compared with the number of nights, but the explanation is quite simple: visits to friends and relatives account for a substantial number of international trips, as do camping holidays (tents and caravans) and only the direct costs of motoring are included. A characteristic of tourism is that, in the vast majority of cases, it is "self-reliant", escaping the commercial accommodation and transport sectors.

In addition to these international trips by Europeans, the following should also be counted for 1995:

- 61 million trips by foreign tourists to Europe;
- what must be a huge number of transit flows, which the statistics disregard.

Europe has the highest demand for international tourism in the world, currently 60 per cent of world tourism demand (in terms of trips) and some 65 per cent of revenues generated by tourism. There are numerous reasons (historic, socioeconomic, cultural and geographical) why its leading position has so far gone unchallenged, a state of affairs that is likely to continue, according to WTO forecasts<sup>6</sup>.

First, of course, is that Europe is a patchwork of twenty or so countries, all within a surface area smaller than that of the United States.

However, this is not the only reason: Europe has far more cultural diversity, it is steeped in history, with a greater number and variety of identities than on the other side of the Atlantic. Except for Europe's islands, there are rarely natural barriers preventing travel by car from one country to another, as is the case in Japan.

Employees in Europe also have longer paid holidays than their US or Japanese counterparts and, consequently, both departure rates and the overall length of holidays can be higher. Likewise, good social security cover in Europe probably allows more scope for leisure activities in retirement. We will come back to this point.

#### *A dynamic, changing market*

In 1996, Europeans made five times more trips abroad than thirty years ago, twice as many as in 1975, which nevertheless marked the end of the long post-war growth cycle. This growth rate -- averaging out at 6 per cent per year over the last thirty years -- slowed sharply in the 1980s to only 3.5 per cent, approximately, in the wake of the second economic recession to hit Europe. However, it is still higher than growth in GDP, household spending or domestic holidays and daily mobility in terms of number of trips per person.

The current average number of trips abroad -- 0.57 trips per person per year -- by EU and EFTA residents shows that this is a general trend: like many other social *mores*, it spread throughout Europe in the 20th century.

Tourist flows have not grown to the same extent in all market sectors. Growth is based on radical changes in tourist mobility behaviour patterns; over the last ten years the most dramatic increase has been in the number of short breaks: short breaks are rising at a faster rate than “long holidays”. This change in the market is easily explained by the fact that, in most of Europe, longer paid holidays enable people to take more long-weekend breaks. In the area of business travel too, the growth in fairs, exhibitions and congresses has stimulated short international trips. This trend is obviously being accelerated by the development of high-speed transport (motorways, aircraft and trains) which cut travel time and often prices (as in air transport).

The destinations of European flows are also changing in line with underlying economic developments. International tourism, in particular, is very sensitive to fluctuating exchange rates. After devaluation, Spain and Italy are once again destinations competing strongly with France. In turn, however, their relative market shares will be challenged by Turkey and more distant destinations, such as Asia, in the next few years.

As well as being sensitive to economic developments, which are often gradual, the tourist industry is highly sensitive to sociopolitical events, both negative and positive, such as:

- The economic recession in the early 1980s, the Gulf War and the Paris bombings of 1986 and 1995, which caused a sudden slump in international flows; and
- The Olympic Games and the universal exhibition in Spain, the fall of the Berlin Wall and the opening up of eastern Europe, which substantially boosted tourism in Europe (the universal exhibition in Portugal, the World Cup in France and the Jubilee in Rome will, no doubt, have similar effects).

Even more than other types of travel, international tourism is also subject to short cycles that are not immune to fashion. This makes any attempt at predicting or forecasting in this industry somewhat difficult.

## **2. TRENDS UNDERLYING THE GROWTH OF TOURISM IN EUROPE**

In order to interpret them correctly, trends in tourism and tourism patterns should be seen in the wider historical and socioeconomic perspective.

### **2.1. General trends in tourism**

Tourism in its current form -- i.e. for relaxation, pleasure and cultural enrichment and using organised supply and transport structures<sup>7</sup> -- dates back just over 150 years.

The first organised tourism is ascribed to the affluent classes of northern Europe, particularly the British. Cook's Tours, Baedeker guides, winter holidays on the Riviera, the first winter sports resorts, the cultural and educational Grand Tours of Italy and Greece throughout the 19th century, all stamped tourism as élitist. Traces of that image still subsist today in the subconscious of would-be travellers and in the literature.

In the 20th century, two major developments were to change tourism profoundly.

The first was a shift in ideology. After the First World War, societies across Europe, each in its own way, advocated social tourism. Tourism became accessible to the masses and was no longer the preserve of the élite. This was followed by a geographical shift that was to be long-lived: the better-off abandoned their tourism locations as they became too popular and crowded. The élite were thus endlessly starting new trends in ever more exclusive and often far-away, places. Some recent examples are the Seychelles, Vietnam, Cambodia, Alaska and Greenland.

The second major development was the general spread of paid holidays and car ownership. This is what, in most countries in Europe, gave rise to the more familiar image of tourism from the 1950s onwards: crowds of tourists on beaches and ski-slopes, in some of the shrines of classical culture, such as Venice, Florence, Rome, Delphi, London and Paris.

Studies by the great sociologists of tourism, in chronological order, Veblen, Reisman and Baudrillard, illustrate these three epochs -- élitist tourism, conformist mass tourism and demanding and narcissistic tourism. They give us an insight into how the supply side evolved to make mass tourism possible, while leading to steadily greater differentiation at a superficial marketing level, with a more recent trend towards real market segmentation along broad themes<sup>8</sup> (tourism for health, culture, gambling, sports or adventure, etc.).

The social culture of Europeans has been a key factor in educating the public on tourism: the trail-blazing parents of the 1960s brought up generations of children to be accustomed to tourism, travel out of interest, different types of tourism and market access.

## **2.2. Socioeconomic dynamics in Europe**

### ***a) Factors relating to values and fashions***

One of the fundamental factors in the development of tourism has been that the majority of consumers no longer consider vacation trips as a luxury. Leisure and tourism have become signs of success. Many surveys show that, when finances are tight, travel will be sacrificed much less readily than the purchase of consumer goods, such as washing machines, televisions or even cars.

### ***b) Changes in the employment relationship -- often recent but no doubt irreversible***

- Shorter working hours and more time off, or free time during the week, the year or a lifetime have been fundamental to changes in leisure and tourism patterns.

Figures for France as a whole show just how much free time has increased:

	<b>Total hours worked in a lifetime</b>	<b>% of lifetime</b>
1948	120 000	20%
1988	70 000	11%

In forty years, total working hours have been cut by 40 per cent. This is due to the aggregate effect of three reductions:

- in working life, by an average of ten years;
- in the working year, by three weeks per year;
- in the working week, by around seven hours per week.

An added consideration is that, while working hours are decreasing, people are living longer.

- There is a dichotomy in the way the employment relationship is evolving, resulting either in longer holidays overall, reflecting a more relaxed approach to life in the firm, or in the need to take frequent short breaks from work, which -- in a fair number of highly interactive professions, particularly in the services sector -- also reflects the fact that greater competition at work precludes taking longer breaks.

### ***c) Important social trends***

Early retirement, longer life expectancies and more affluent pensioners are boosting the departure rates of people in the 55-75 age bracket, which had been particularly low. Carriers and hoteliers are targeting this age group, which is free to utilise tourist capacity in the off-season, with hundreds of special offers.

At the other end of the age scale, single adults and couples with no children -- a steadily larger share of the population -- are also target markets that have already been widely studied and nurtured by carriers. The increase in dual income households<sup>9</sup> is changing household time/income trade-offs and often makes it more difficult to reconcile long absences for two working partners.

### ***d) Advanced technology and the crucial role of transport***

The train, the main mode of transport for tourists since the 19th century, was overtaken by the car in the 1960s. Since then, the spectacular increase in private car ownership has brought unlimited opportunities for easy escape. It is so much a part of daily life that we forget one basic fact: the vast majority of households now own a “vehicle” that has turned their dreams of holidays into reality ... or even set them dreaming in the first place?

The development of motorway and high-speed rail networks and the elimination of natural barriers by major feats of engineering that have enabled the operation of services such as Eurostar, have now reduced travel time.

Reservation systems are becoming more flexible and provide increasing choice. Now that they are easier to use, they are used more widely. These systems set people dreaming and make it possible to take last-minute holiday decisions on impulse.

#### *e) Policy factors*

Initiatives at European Union level tend to standardize legislation in the Member States and eliminate “frontier effects” in the region.

Deregulation of air transport, along with access to new regional and international destinations and the availability of more intra-European flights at attractive fares, are bringing in new clients and more frequent travel.

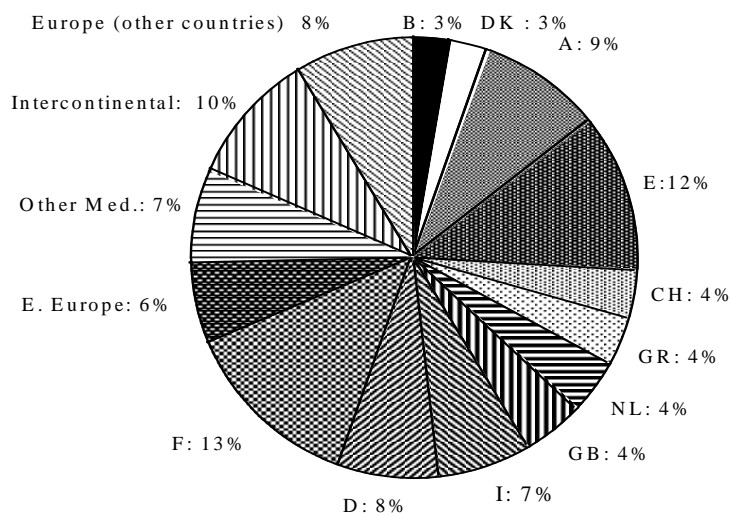
### **3. PRINCIPAL CHARACTERISTICS OF THE MARKET**

The data below are taken from ETM. They are for 1995.

#### **3.1. An intra-European market**

Eighty-three per cent of travel by residents in EU and EFTA countries is to destinations inside Europe (77 per cent to western Europe, 6 per cent to eastern Europe) and 7 per cent to southern Mediterranean countries, particularly to the home countries of immigrants working in Europe. Only 10 per cent of travel is intercontinental, i.e. to Asia, sub-Saharan Africa, America and Oceania (see Figure 1).

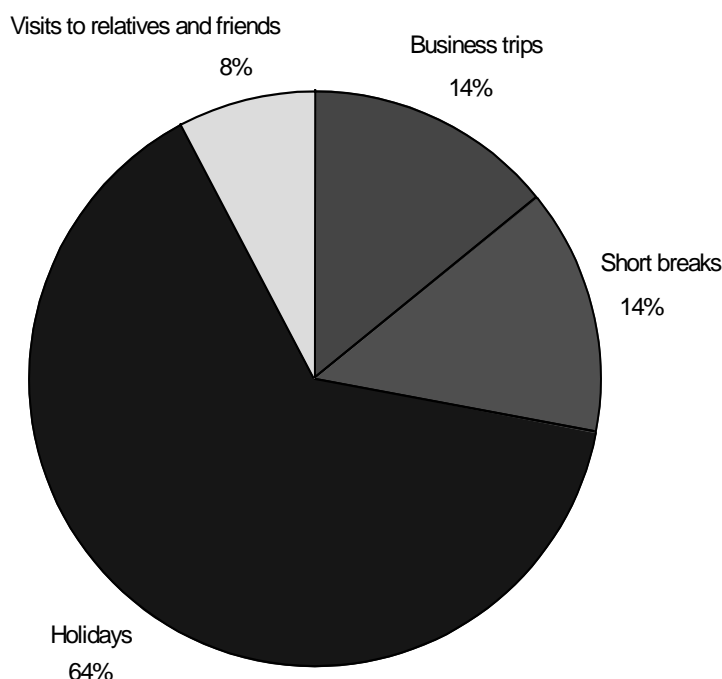
Figure 1. **Breakdown of all travel abroad by Europeans, by main destination -- 1995**



### 3.2. A leisure-dominated market

Holidays and short breaks account for 78 per cent of total travel, to which can be added, under the heading of leisure travel, the 8 per cent of travel generated by visits to friends and relatives (see Figure 2). Only 14 per cent of travel is for business purposes. This percentage would change slightly if same-day business travel (with no overnight stay in the destination) were included. For example, 5.9 million business trips to France do not include an overnight stay, while 7.9 million include a stay of at least one night. These are almost exclusively trips from its immediate neighbours. They are short-distance trips, of which 90 per cent are made by car<sup>10</sup>.

Figure 2. **Breakdown of international travel by Europeans, by reason for travel -- 1995**



### 3.3. Sunseeking

Large flows from northern to southern Europe are well documented and confirmed by our figures: all the countries on the northern shore of the Mediterranean (France, Spain, Italy, Greece) and similar (Portugal) have a positive tourism balance. The balance is negative for Germany, the United Kingdom and the Benelux and Scandinavian countries. The only real exception to the rule is Austria, the Germans' preferred holiday resort (see Figures 3 and 4).

There is no reason why the overwhelming predominance of southern Europe should not continue, partly because of the large percentage of "sun and sand" holidays and partly because of the differences in standard of living between most of the countries of northern and southern Europe. At the same time, it could be partially eroded by two largely unrelated phenomena.

- First, the fast growth in short breaks has led to a new form of tourism -- urban tourism. Cities are the most popular destination for short breaks and many cities in northern Europe have no shortage of attractions for this type of tourism (London, Amsterdam, Copenhagen, Oslo).
- Second, the faster economic development of southern European countries like Greece or Portugal, which are in a better position than others to take advantage of the construction of the enlarged European market to improve their growth, standard of living and international mobility.

Figure 3. **Relative share of all travel abroad by Europeans,  
by generating country -- 1995**

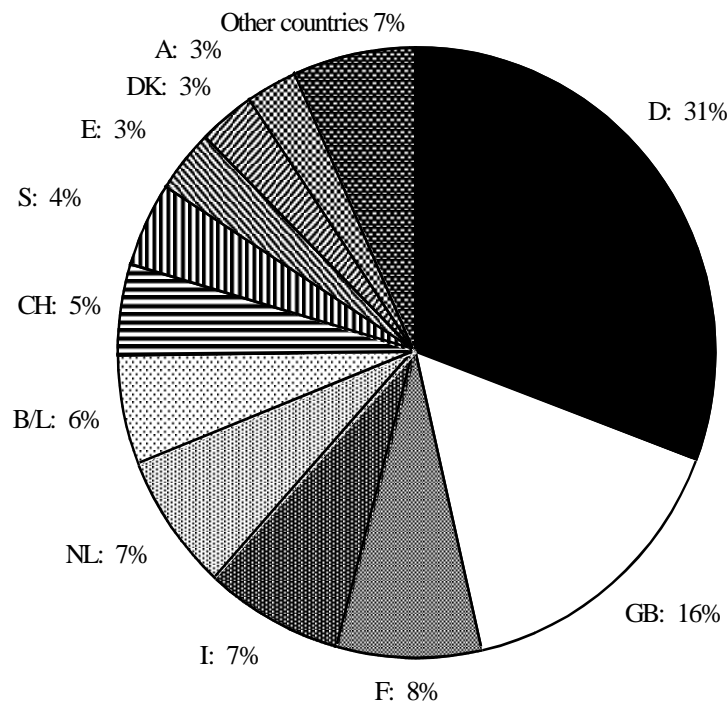
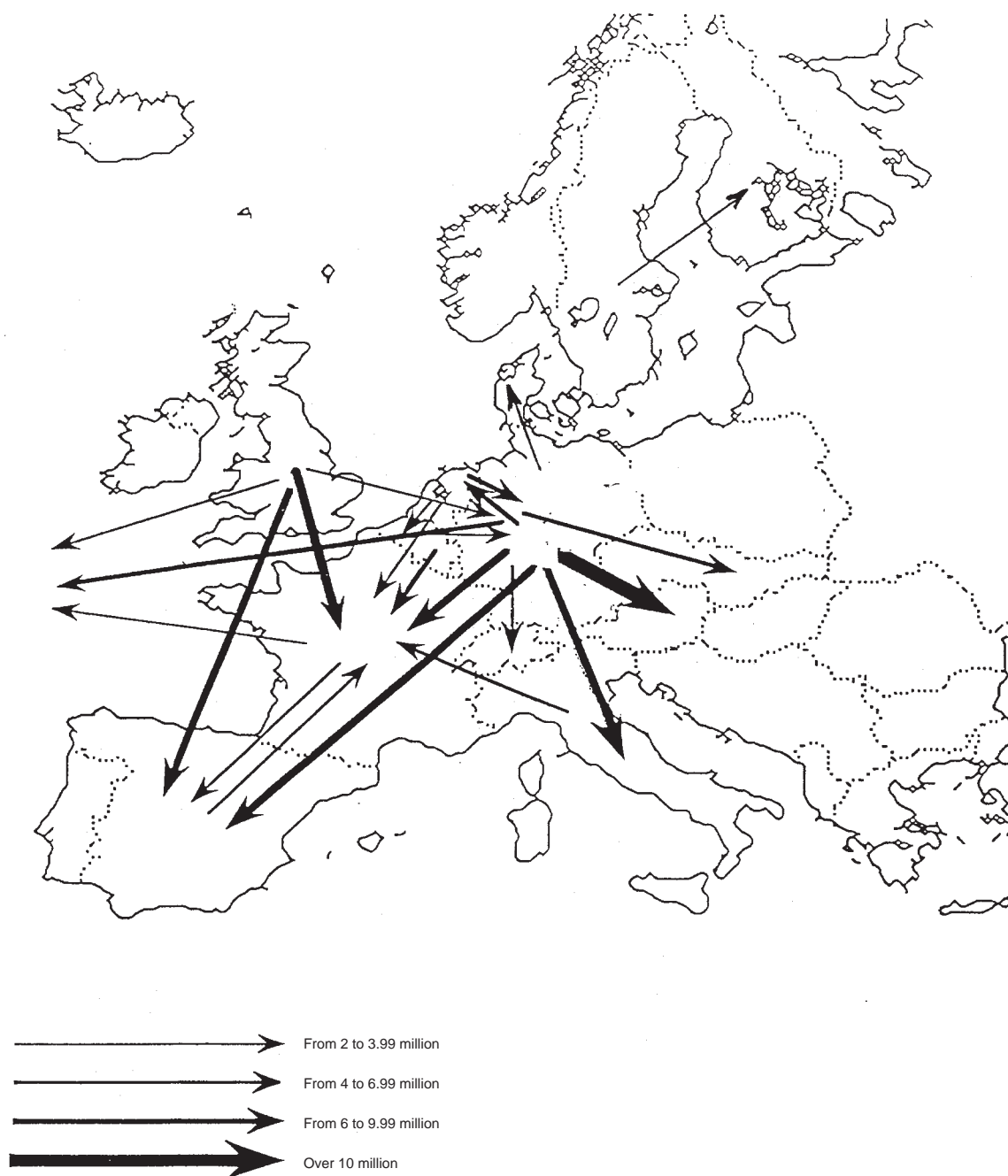


Figure 4. **Main international flows in Europe**  
All transport modes





### 3.4. Proximity

In continental Europe, flows to neighbouring countries (with which they share a common border) account for between 40 per cent (Denmark) and 60 per cent (Germany, Switzerland) of all flows. In the leisure sector, this concentration of flows on neighbouring countries is obviously higher for short breaks and visits to friends and relatives than for long holidays, which more frequently involve longer trips to the Mediterranean countries.

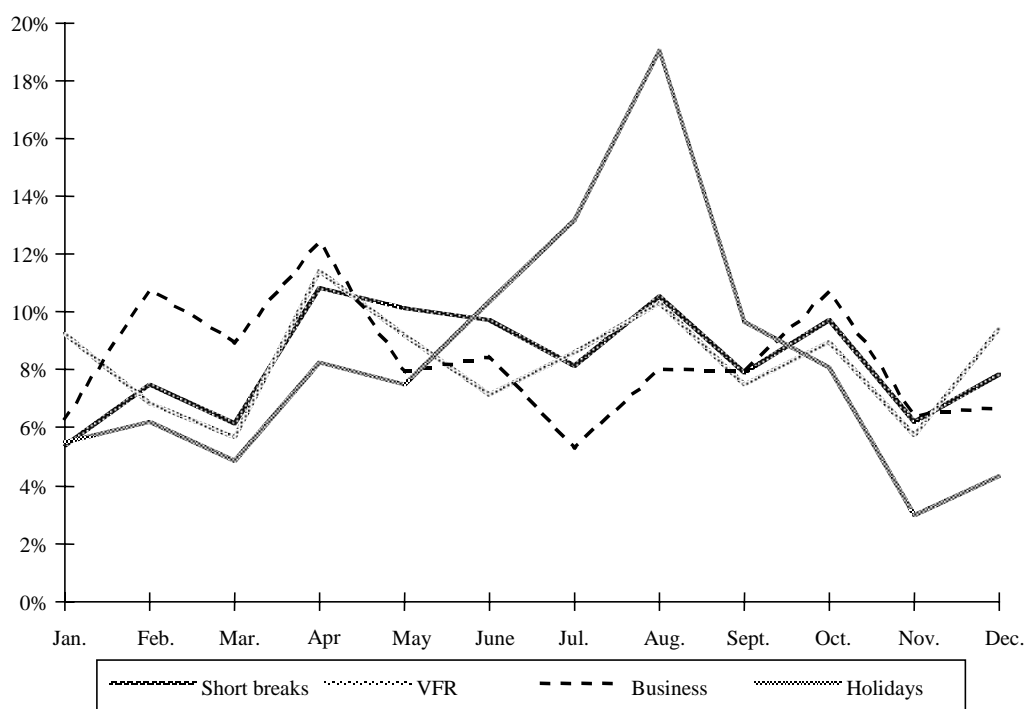
In the business sector, flows are, on average, a little less concentrated on neighbouring countries: Germany attracts more business travel (16 per cent of all business travel) than the Mediterranean.

The fact that a little over half of all trips are medium-distance trips (the distance between capitals of neighbouring European countries is rarely more than 500-600 km) means that there will be scope for rail and air to compete freely, as high-speed rail networks begin running in Europe and airport saturation gets worse.

### 3.5. Concentration in time

Two-thirds of trips take place during what is classed as the summer season (April to September) and a little over one-quarter of all trips take place in July-August.

Figure 5. **Breakdown of number of international journeys by Europeans, by reason for travel and month -- 1995**



This concentration reflects the share of the main holidays (67 per cent) in all trips. Holiday travel is highly concentrated in July-August (33 per cent, 41 per cent if September is included). Conversely, business travel declines in July-August and peaks (though not markedly so) in April and October. Visits to friends and family are spread more or less evenly throughout the year, with a slight peak around Christmas and the New Year. Short breaks are evenly spread over the summer season (59 per cent April-September, see Figure 5).

Holiday travel accounts for a large part of this concentration in time and consequently transport by car shows the highest peak, accounting for 33 per cent of trips in the July-August period.

### 3.6. Importance of the car

The car is the dominant mode (56 per cent) for international trips to visit relatives and friends (often the whole family travels) and a major mode for leisure trips (40 per cent). However, even in these markets it is being rivalled by air travel, which caters for just under one-third of such trips. Air is the main mode for business travel (see Figure 6).

Coach travel is well placed for tours, short trips, urban tourism and for organised tours in general, accounting for one-third of the market, coming just behind air travel with 45 per cent. Its competitive pricing enables it to respond to the needs of less well-off customers (the socially disadvantaged, single women, young people, the elderly). However, bus travel also reflects domestic social traditions, as in Germany. The train is better suited to the needs of the same categories -- especially when they live in large towns, close to main stations -- for trips not organised by a tour operator.

Figure 6. **Breakdown of international journeys by Europeans, by transport mode and reason for travel -- 1995**

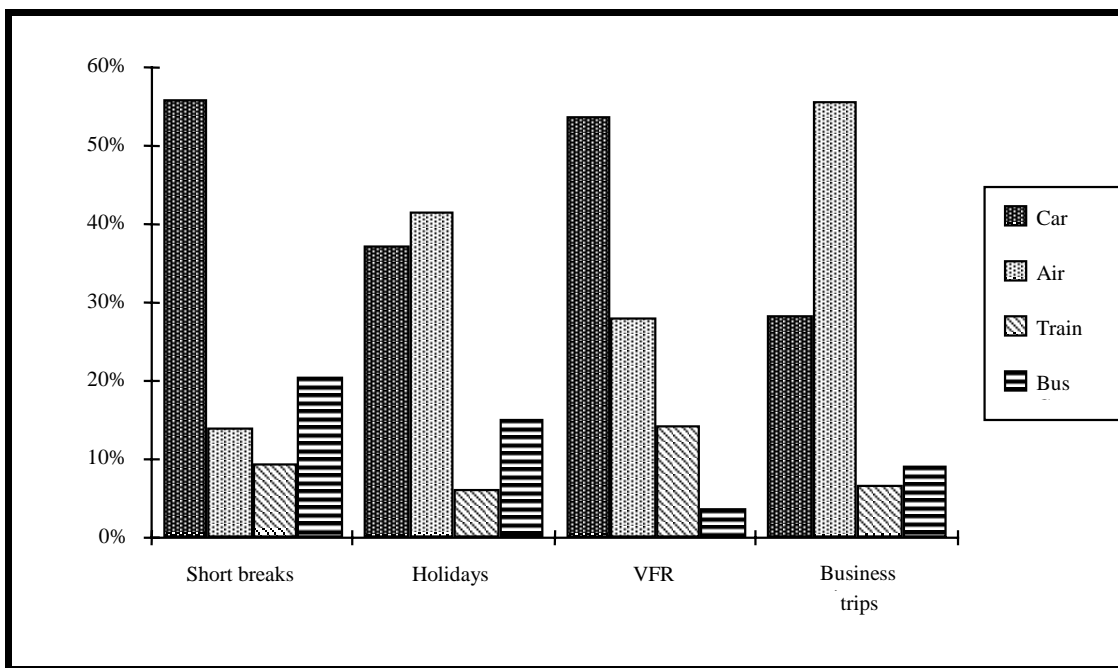
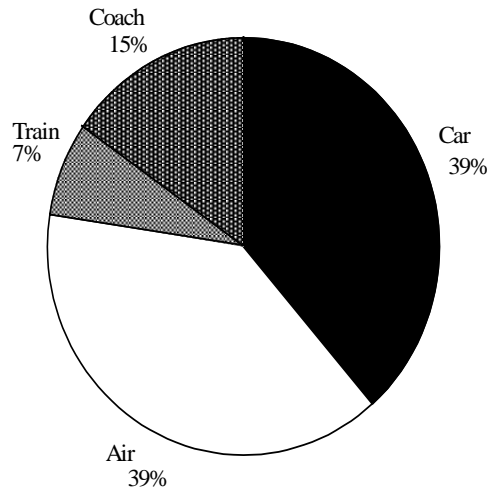


Figure 7. **Breakdown of international travel by Europeans,  
by transport mode -- 1995**



### 3.7. The tourist population

Findings on international tourism by Europeans are consistent with those on holidays and mobility in general. On the basis of the average number of stays abroad, they demonstrate that high-income, educated households in the upper socioeconomic categories (managerial, professions), residing in large European cities, are over-represented.

In addition to the classic economic determinants, other socioeconomic variables also influence the international travel behaviour of Europeans. These are, in order of importance:

- *Age*: generally, the number of trips abroad taken by Europeans increases with age, up to 60 -- Europeans between 35 and 60 combine business and pleasure trips -- declining sharply from 60 onwards. This finding was particularly true for Italy, Spain, Portugal and Greece and much less marked for the United Kingdom and France.
- *Young children* are a hindrance to international travel (chiefly in Germany): more than half of all Europeans who travel abroad live alone or are childless couples; only 15 per cent have children under 15 years of age. The constraints of school are also apparent: travel by households with no children shows a greater seasonal spread (30 per cent in the summer) than trips by households with children (42 per cent in summer). Similarly, trips by the 55 and over age group are more evenly spread throughout the year (35 per cent in July-September) than are trips by young travellers (42 per cent in summer).
- *Men travel abroad (56 per cent) more than women*, which is easily explained, on the face of it, by the fact that 80 per cent of business travel is by men. However, the survey also reflects variations in the status of women in different countries: the proportion of women travelling abroad is higher in northern Europe than in the south.

By and large, those who travel most often abroad are managers, the under 35s, people living in cities, single people and childless couples. Those who travel least often abroad are the retired, the unemployed, the elderly, people on low incomes, people living in rural areas, Europeans with young children and women from southern Europe.

## **4. EUROPEAN DIVERSITY**

As we shall see, international travel patterns show enormous variations from one country to another. Even if we confine our analysis of these variations to two basic parameters -- departure rate and modal choice -- variations can be explained by any of several models. In the first section (4.1.) we suggest some likely explanations. The analyses of departure rates in the second section and of modal choice in the third will show how relevant these explanations are. The country classification proposed in section 4.4. sums them up.

### **4.1. Why such diversity?**

Departure rates (defined as the average number of trips involving a stay of at least one night in a foreign country per person over 15 years old per year) vary by a factor of 1 to 10 in the countries under study, while the modal share of the car ranges between 10 and 56 per cent and that of air transport between 23 and 77 per cent. We have never encountered such large variations between countries in other areas, such as daily mobility or car ownership and use. In theory, demography and lifestyles, or economic and geographical factors, should explain these differences.

Demography and lifestyles can play a role at many different levels: large numbers of young children (Ireland), short holidays and a still sizeable agricultural population (Ireland, Greece) can act as a brake on travel, while in countries of emigration (Portugal, Ireland) or immigration (France) the need to maintain family contacts can encourage travel. Analysis of the statistics for Europe suggests that, while these factors are no doubt very significant for the individuals concerned, they do not explain a great deal at aggregate level, which shows little significant variation in these factors across Europe.

The economy must play a major role, through at least three factors: a country's wealth (for example, per capita GDP), which is a determinant of both business and leisure travel, the degree of openness of the economy (for example, the ratio of imports/exports to GDP), which is probably related to the amount of business travel and differences in income, standard of living and prices between a given country and its neighbours, which can influence the propensity to spend leisure time in one's home country or in a country where salaries are lower.

Lastly, geography dictates how easy or difficult it is to travel and the location of the country relative to high attraction areas is significant, as are natural barriers (Ireland and the United Kingdom, despite the Channel Tunnel), a country's size (it is difficult to avoid leaving Luxembourg, for example, which obviously raises a definition problem), its distance from the Mediterranean or, conversely, the fact that it is located in the Mediterranean area.

The following information can be used to assess the influence of these factors on departure rates and choice of transport mode.

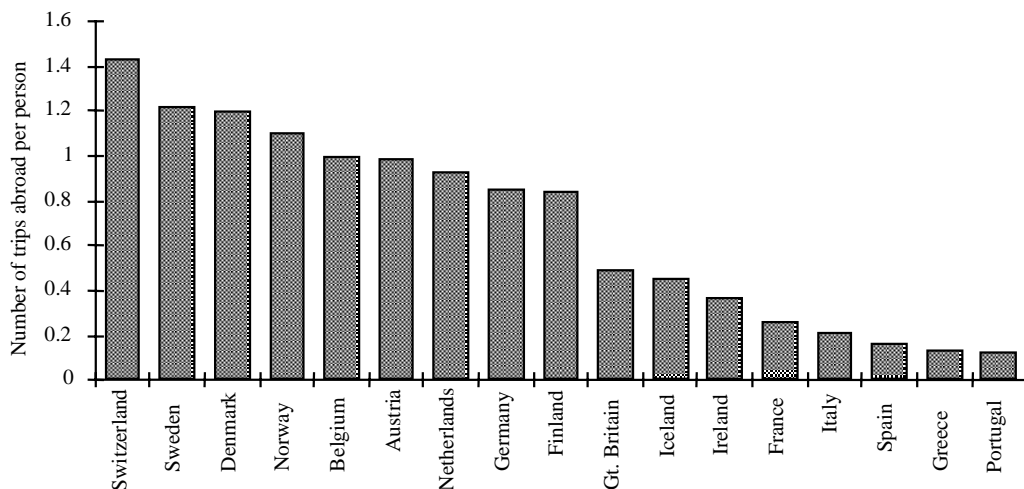
#### 4.2. European diversity: departure rates, days spent abroad, number of countries visited

##### *A broad spread of departure rates*

An analysis of departure rates is the first test of the above assumptions.

- The rate of international departures abroad is lower in southern European countries (see Figure 8), which admittedly have a wide variety of natural attractions. The level of income and peripheral location are factors that should be borne in mind for the Iberian Peninsula and Greece.
- Next come Ireland, the United Kingdom and Iceland, where natural barriers clearly act as a brake on departures. The fact that Ireland and the United Kingdom are close together on the departure rate scale should not suggest any symmetry or uniformity in behaviour: more than half of Ireland's demand is directed towards the United Kingdom, while demand in the latter is directed towards Mediterranean countries, with only a small portion of its international mobility reserved for Ireland.
- The highest rates are for countries in the north and centre of Europe, which combine all the factors conducive to foreign travel: high standards of living, major industrial activity, no Mediterranean seaboard and relatively easy access to the Mediterranean by car.

Figure 8. Number of trips abroad per resident, for European countries -- 1995



### ***Borders remain significant***

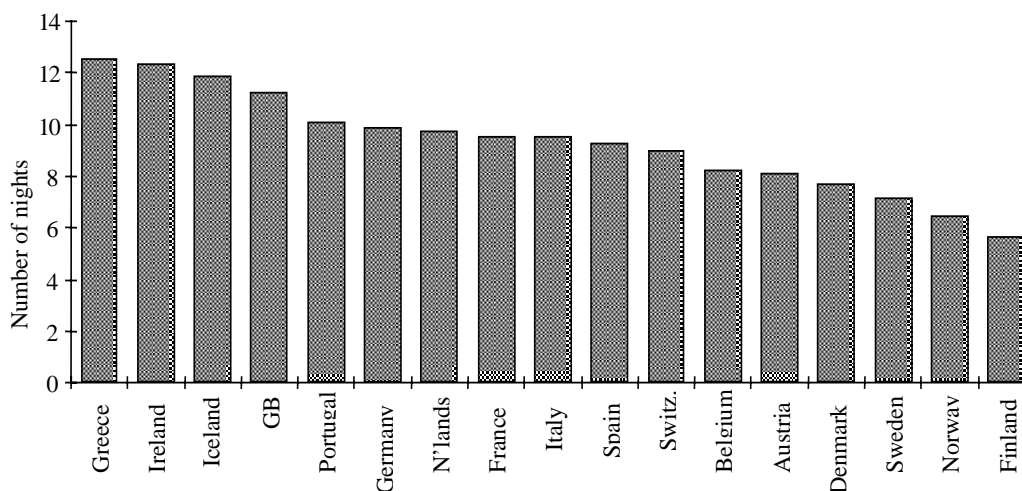
The significance of the observed rates still has to be put in perspective, particularly for small countries: in many cases, a trip of more than 100 kilometres in Belgium, Luxembourg, the Netherlands or Switzerland means crossing a border. Observed departure rates there (of the order of 1.3 trips) are well below the number of trips of over 100 km observed in France (around four trips involving at least one night away from home), for a comparable 15-and-over population, which suggests that there is still a significant frontier effect.

### ***Shorter and more frequent trips***

While the departure rate varies by a ratio of 1 to 10 (Portugal and Switzerland), the average duration, by country, of each trip is still quite concentrated and varies only by a ratio of 1 to less than 2 (see Figure 9). Intuitively, this might suggest that average durations are longest for countries far from the “centre of gravity” of the EU, with less frequent but long stays. This is indeed borne out for the Greeks, the English and the Irish, with average durations of 11 to 12 nights. Where the theory falls down is for Scandinavians, owing to the large proportion of short holiday breaks and business trips to neighbouring Nordic countries.

An analysis of departure rates and length of stay, together, reveals tourist behaviours that have important implications for the transport sector: *people who take shorter trips also take more frequent trips.*

**Figure 9. Average duration of trips abroad by residents of European countries -- 1995**



### ***Multi-destination trips dependent on travel costs***

Most trips abroad are to a single destination country: an average of 1.02 to 1.26 countries are visited per trip. It is travellers from the peripheral countries (Finland, Sweden, Norway, Portugal and Greece) who are most likely to combine visits to several countries in one trip. The higher the costs of travel, the greater the tendency to combine destinations, just as we find for daily travel.

What these observations suggest is plainly a combination of different effects.

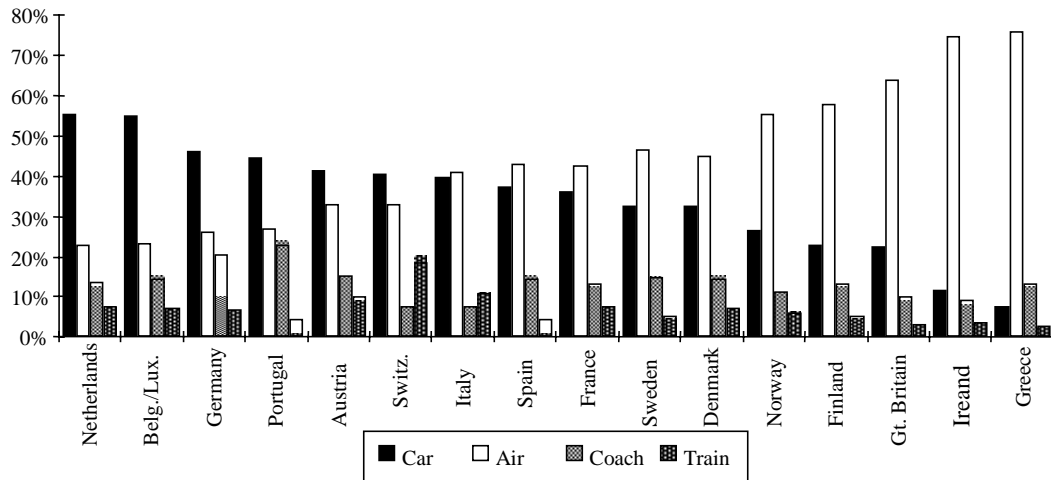
- Departure rates in the Mediterranean basin are very low, even in countries such as France and Italy, where the standard of living is comparable to that of other European countries. This is hardly surprising, since the Mediterranean is itself the destination of more than half of all international travel by Europeans.
- While the non-Mediterranean countries have comfortable incomes, on average, what differentiates them is ease of travel outside the country. Naturally, travel abroad is more of a problem for the United Kingdom and Ireland, where departure rates are no more than moderate.
- With comfortable incomes and relatively easy access to the Mediterranean, the countries of central Europe and the Scandinavian peninsula are the largest trip generators. Among these, the highest departure rates are noted in the Nordic countries -- where demand is highly diversified among neighbouring countries -- and, naturally, in small countries, where trips of more than 100 kilometres usually mean crossing a border.

#### **4.3. Use of modes**

The challenge here is to understand the variations in modal split for travel abroad from different departure countries. We adopted the following conventions for the mode of transport used: a trip by air is classed as air travel whatever other surface modes may be used in addition. Conversely, a trip by ferry is assigned to one of the main surface travel modes: car, train or coach. Using these conventions, very significant variations have been observed: for instance, the share of the car ranges from 8 per cent (Greece) to 56 per cent (the Netherlands) while that of air ranges from 76 per cent to 23 per cent, respectively, for the same countries. However, the range for the share of surface passenger transport modes (coach and train) is only 9 per cent (Ireland) to 23 per cent (Portugal) for coach transport and only 3 per cent (United Kingdom and Greece) to 19 per cent (Switzerland) for rail (see Figure 10).

Here again, we have combined several factors to try to account for these variations. These factors are variations in car ownership rates, use of passenger transport, motivational structure and destination split between neighbouring and distant countries. In the following discussion, neighbouring countries are those with a common land border. Two exceptions: Sweden and Denmark are considered neighbouring countries because of the travel facilities across the Oresund, while Norway and Finland are not considered neighbouring countries, because the border they share is so far north, away from population centres.

Figure 10. **Breakdown of international travel by Europeans, by transport mode**



#### a) *Passenger transport versus the car*

Given that it is the better off section of the population -- generally car owners -- that most often travels abroad, the explanations of the variations observed should hold no surprises for us. However, this first fact has to be balanced against at least two explanatory factors which are combined to a varying degree in different countries.

- A significant impact on modal split between the car on the one hand and train and coach on the other: the ratio of trips by car compared with trips by other surface transport modes, which is a factor essentially in Greece and Ireland (countries in which car ownership is low).
- Regional traditions in the use of passenger modes in countries with high car ownership rates and extensive take-up of organised trips: seen clearly in the Scandinavian countries and in Switzerland (where rail plays an important role, for both travel abroad and domestic travel).

#### b) *Reasons for travel*

Leisure is by far the dominant reason for travel, accounting for 77 per cent of demand (as opposed to 14 per cent for business and 8 per cent for visits to relatives and friends) or more in some countries (Germany and the Netherlands), owing to the very low percentage of outbound business trips by Germans (foreigners travel to Germany on business) and the very low percentage of visits made by the Dutch.

Travel to visit family is mainly from small countries surrounded by larger linguistic or cultural environments: Ireland, Switzerland, Denmark.



Business trips, obviously, account for the largest share of travel from countries with the most modest incomes, where the section of the population that can allocate part of its income to foreign travel is small (Greece, Portugal, Spain). However, we should point out that they also account for a large share in Nordic countries, whose economies are closely interlinked.

The influence of reasons for travel on modal choice is far from negligible: excluding island countries, the country that most uses air mode is Greece (the poorest country), while Germany, with 25 per cent air travel, is one of the lowest users. The share of air travel is similarly high in Scandinavian countries (between 45 and 57 per cent), where business travel is a major part of demand. The higher the proportion of business trips, the greater the use made of air travel: Portugal is the only exception to this correlation between business travel and the use of air transport.

*c) Destination countries*

The geographical origin/destination structure of international flows is the primary determinant of modal split.

The first point to mention is the share of trips outside the Europe-North Africa area, for which air mode is the only practical option. However, as these account for nowhere near the majority of trips, 7 per cent overall and no more than 13 per cent even in the former colonial powers (13 per cent for France, 12 per cent for the United Kingdom, 10 per cent for Spain), we must look elsewhere for an explanation.

*The presence of natural barriers and the relative distance of generating countries* is clearly a factor that works in favour of air travel: Irish travellers, who would otherwise have to take one or probably two ferries to get to mainland Europe, use the air mode in 76 per cent of cases. British travellers, with only one crossing to make (not forgetting the Channel Tunnel), travel by air in 62 per cent of cases<sup>11</sup>. Air is also the main mode in Norway and Finland (57 per cent), while its share falls to 45 per cent in Denmark and Sweden. The relative isolation of Greece (and its high proportion of business trips) also leads to intensive use of air travel (76 per cent).

*Proximity: neighbouring versus distant countries.* In order to be able to apply the concept of difficulty of travel, we have split travel from the countries under study into destinations in neighbouring countries (with a common land border, see above) and other countries.

Excluding island countries (which by definition have no neighbouring countries), the share of trips to neighbouring country destinations varies from 15 per cent (in Greece) to 76 per cent in Austria. Aside from Greece, Nordic countries generate the lowest share of trips to neighbouring countries, while the German-speaking countries in central Europe (Germany, Austria, Switzerland) generate the highest share. The share of air travel is also lowest in these latter countries.

An examination of modal split by type of travel (to a neighbouring or other country) broadly confirms this assumption.

- The share of air for travel to neighbouring country destinations ranges, depending on the origin country, from 3 to 31 per cent (see Figure 11). To other countries it ranges from 34 to 80 per cent when island countries are included and from 34 to 58 per cent otherwise.

- In contrast, the share of car transport (see Figure 12) ranges from 10 to 39 per cent for travel to countries with no common border and from 32 to 77 per cent for travel to neighbouring countries.
- For surface passenger transport modes, the share of the train is usually at least twice as high for travel to neighbouring countries as for travel to other countries (except in Norway where it is the same). The share of coach mode varies rather erratically: it is around the same in Scandinavia and the Iberian Peninsula, substantially lower in Germany, Italy and Greece and higher in Belgium and the Netherlands. The share of train and coach modes together is lower in practically all countries -- sometimes substantially (Greece, Italy) -- for travel to non-neighbouring than to neighbouring countries. It is higher only in Belgium, the Netherlands and Portugal.

Of course, one must not be too rigid about the role played by the origin/destination pair in the choice of transport mode. In fact, substantial variations in modal choice can be found for any given origin/destination pair, depending on whether the trip is for personal or business purposes and even for origins/destinations where standards of living differ, depending on whether the traveller is from the poorer or richer country. However, the difficulty of travel, whether because of natural barriers or long distances, is a determining factor in the choice of transport mode.

#### **4.4. Classification of European generating countries**

We have classified European countries into six groups according to the different characteristics of their international outbound flows<sup>12</sup>:

##### ***a) Rhine region countries: Netherlands, Belgium, Luxembourg, Germany***

Departure rates in the Rhine region countries are high, at more than one international trip per person per year. Four out of five trips abroad from these countries are for holidays by the sea or in the country, mainly in the summer. Of course, because these are vacation trips they are longer than the average trip abroad by European travellers. A little over half of the trips abroad from the Rhine region are by car (55 per cent); the three other modes (air, coach and train) are used for 20, 15 and 10 per cent of trips.

People travelling abroad from these countries are middle-class and half of them live in big cities. They travel as a family when their children are teenagers, but tend to stay at home when their children are young.

##### ***b) The Scandinavian countries: Sweden, Norway, Finland, Denmark***

As with the residents of the Rhine region, Scandinavians travel abroad frequently: 1.06 trips per person. However, their trips tend to be shorter (one-third are short breaks) and over one-quarter are business trips. No doubt because of the harsh winters, they feel the need to get away to other parts more in winter than do other European travellers. Besides seaside resorts (one-third of trips), Scandinavians' most popular destinations abroad are cities.

The typical Scandinavian travelling abroad is a male, with high social status, single or one of a childless couple and between 30 and 55 years old.

**c) *Island countries: the United Kingdom, Ireland, Iceland***

The populations of these island countries, separated from the rest of Europe by the sea, do not travel a great deal abroad: 0.5 trips per person per year.

They are large consumers of organised travel, which they invented. Their stays abroad are long, for social reasons or holidays. Their preferred destination is the sun (46 per cent of trips). Even since the advent of Eurostar, they prefer to travel by air (70 per cent).

International travellers live in the country or in medium-sized cities. They are middle-class and on the young side. They travel as families, even when their children are young.

**d) *Alpine countries: Switzerland and Austria***

These mountainous countries generate some of the highest levels of travel abroad: 0.9 trips per year per person. Forty per cent of travellers in the Alpine group travel abroad by car and 20 per cent by air. However, a clear distinction is apparent in this group, since one-quarter of Swiss travellers prefer the train, while one-quarter of Austrians prefer the coach. Their rather short stays are mainly taken in the summer, at the seaside or to visit friends and family.

The majority of international travellers in this group live in the big cities, are of high social status and from small families.

**e) *Mediterranean countries: Spain, Italy, Portugal, Greece***

People from the Mediterranean do not travel abroad a great deal: 0.22 trips per year per person, probably because their own climate is good and their standard of living relatively low.

The share of travel abroad on business by this group is higher and holiday travel lower than for other Europeans. Most of their trips abroad, 39 per cent by car, 42 per cent by air and 7 per cent by train, are for at least a week, spent touring mainly from city to city, in countries outside Europe.

**f) *France: a link country***

In a key geographical location between the countries of northern and southern Europe, France generates a very low level of international travel: 0.27 trips per year per person.

As with the countries of the Rhine, most French travel abroad is motivated by holidays (66 per cent) at the seaside, in cities or on tours and the vast majority is to overseas countries, as with the Mediterranean group. French travellers prefer to travel by air (43 per cent) and car (36 per cent). French international travellers are from all social categories; are somewhat older than other nationalities, city-dwellers and generally have no children.

Figure 11. Main international flows of European travellers by air – 1995

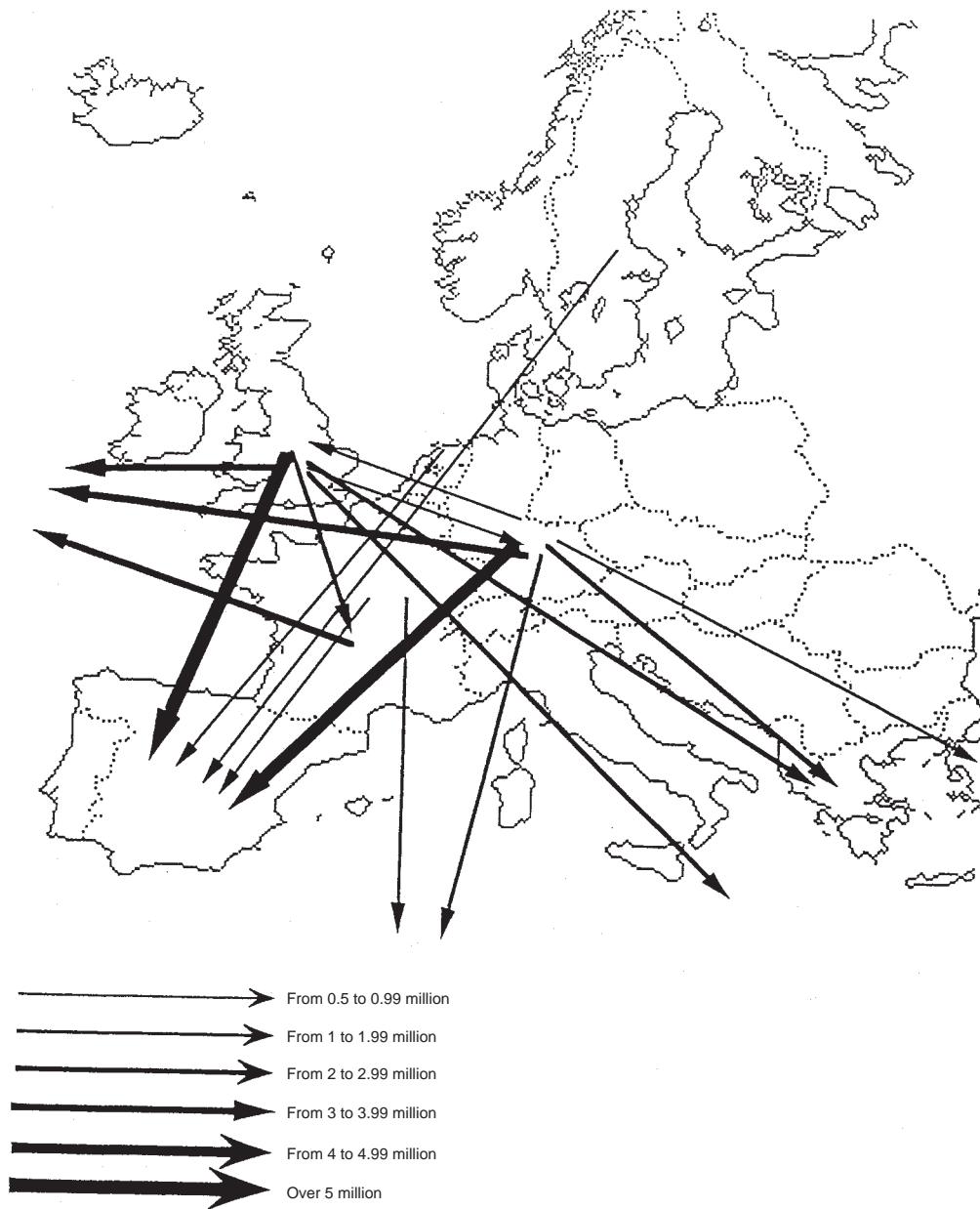
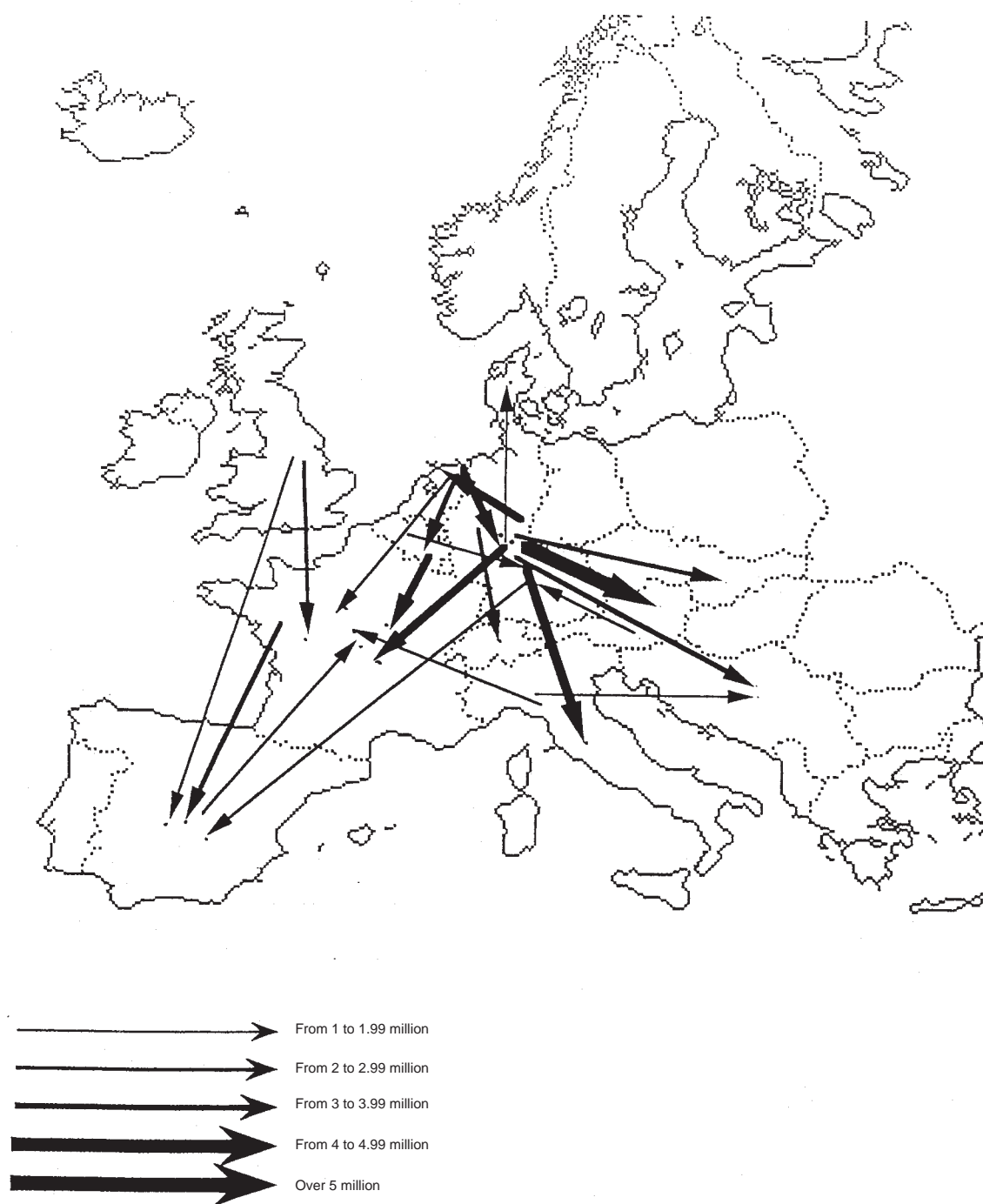


Figure 12. Main international flows of European travellers by car – 1995



## **5. DIFFERING LEVELS OF MARKETING ACCORDING TO SECTOR**

Although all carriers are taking a greater interest in leisure customers, only the air transport sector has fully realised the importance of tourism. The reasons for this are obvious in that leisure trips account for the bulk of the long-haul transport market and on a large number of routes the volume of leisure trips is actually higher than that of business trips (in terms of number of passengers carried, if not value added). Major acquisitions in the hotel sector by the airline companies, coupled with a favourable marketing culture from the very outset, complete the picture.

On scheduled flights, tourism is seen as an additional source of customers who must be steered by tariff structures towards time slots which complement those used by business passengers. For charter flights, tourism in all its forms accounts for the bulk of the market.

The situation with regard to inland modes of transport is quite different. With the exception of the motorway sector and toll-motorways in particular, tourist transport is still undervalued:

- The railways' lack of a strong cultural identity is surprising given the historical importance of the role played by them in the past. Rail transport, despite being highly seasonal with major traffic peaks during traditional holiday periods, is still generally perceived as a public service and as such is not yet subject to stringent price regulation;
- The planning of urban transport systems, which focuses almost exclusively on services during the working week, takes absolutely no account of tourist traffic.

Lastly, tourism is now the only area of activity in which coach operators are experiencing growth. However, coach operators still do not seem to have any genuine desire to develop tourism activities.

## **6. POSSIBLE IMPACT ON CARRIERS OF CHANGES IN TOURIST BEHAVIOUR**

BY DIVIDING TOURISM MARKETS INTO TIME SEGMENTS, IT IS POSSIBLE TO PREDICT THE PROBABLE IMPACT OF CHANGES IN THESE MARKETS ON THE TRANSPORT SECTOR.

### *Summer holidays*

Traditionally the main area of activity for carriers, summer holidays are and will remain of major concern to carriers because of the problems they pose in terms of traffic peaks, the number of which has increased, due to growth in the number of shorter holidays taken at different periods of the year. Mass departures at the beginning of holiday periods, irrespective of the mode of transport used, are another area of concern and efforts are being made to contain this problem through price regulation and better information on road conditions. Such periods also pose major problems in terms of safety.

In addition, trips generated by "summer" tourists, in areas where tourist flows are already extremely dense, pose enormous problems for local transport operators, an issue that has never been properly addressed in its entirety.

### *One-week holidays*

- a) Skiing holidays. A traditional source of peak congestion on the railways and motorways, skiing holidays look set to remain at their current level.
- b) The week in the sun. This is an area which is expanding and which in some cases is starting to compete strongly with skiing holidays. Such holidays generally attract a clientele made up of relatively young adults seeking active holidays with a cultural and sightseeing component. This category of customer will increasingly be of interest to the air transport sector.

### *Business trips with a tourism component*

The emergence of the international business executive has led to rapid growth in the number of conferences, seminars and meetings organised by companies abroad and clearly the desire to travel and see new places is an important factor in this growth. Business tourism can also now be used to play the complex role of an “incentive”, a subtle mix of the desire to motivate workers, forge a team spirit and avoid paying tax. This is an extremely promising niche market for the luxury end of the supply side.

### *Mid-week breaks*

This is an area currently experiencing very high levels of growth. Mid-week breaks are shorter but more sophisticated forms of tourism, primarily over medium-haul distances, and tend to be to cities and for cultural reasons. These short holidays are of considerable interest to professionals in the tourism sector. Carriers see them as a means of making full use of incentives in order to supplement their business customer traffic. More generally, tour operators are making great efforts, which are proving highly effective, to market a new form of bespoke tourism, through a variety of products, which meets the expectations of a clientele made up of small family groups that are more independent, have more disposable income and are more mobile than the average family.

This is a major source of customers for cities which, in the years to come, the latter will have to take into account in their planning of urban transport infrastructure.

### *Traditional weekend breaks*

The large number of trips made in connection with traditional weekend breaks, all of which are by car, constitutes an area of sure expansion as a result of growth in new forms of social relations and car ownership.

At the other end of the spectrum, and also experiencing high growth, “getaway” weekend breaks in cities that are perceived as being highly attractive destinations will increasingly be of interest to the air transport and rail sectors.

Traditionally overlooked in tourism studies, excursions, which are currently experiencing high levels of growth, are an important market for carriers and particularly for coach operators, who are now starting to tailor their supply to meet the needs of different categories of customer.

## CONCLUSION

From this overview of international mobility, we wish to single out two conclusions, one specific to the field, the other touching more on methodology.

The international tourism market, whose economic importance is far from negligible, is likely to grow significantly around its two major centres: Germany, for business travel (which has played a greater role since the opening up of eastern Europe) and the Mediterranean. The higher growth in short breaks will also help to increase the share of transport in overall tourist receipts.

As regards methodology:

- We have been struck by certain similarities in processes operating at European level and processes observed in daily mobility studies in each of our micro-spaces: concentration of the least well-off in their places of residence; higher proportion of required (business) travel in overall mobility for modest-income groups as opposed to the most well-off; tendency to combine trips among those for whom the costs of transport are important; higher proportion of “independent” transport (the car) for short trips (to a neighbouring country). *Possibly a reassuring observation for transport studies?*
- Contrary to the field of “required” travel, clearly motivated by the implicit contract between an individual and society, the primary reason for tourism is the allure of travel itself. The two great paradigms of classic behavioural research on transport are thus difficult to apply. The first, spatial modelling, is redundant as regards the actual decision to travel or not. The second, activity programmes, so dear to the Swedish school, is inadequate: how can one refer to a tourism activity imposing its place and pace?

Another approach is therefore needed. Not many theories are available as yet, as research in this field is still in its infancy.

For our part, we would be tempted to rely on an analytical approach based on sub-markets, which are more uniform than the tourism field overall.



## NOTES

1. The EU has a substantial statistical agency, Eurostat, but it has not yet managed to standardize data collection on tourist flows, as practice varies a great deal from one country to the next. However, there is currently an attempt to bring the transport and tourist sectors into closer alignment in order to standardize definitions, statistics and survey contents.
2. The difference between an excursionist and a tourist is the length of the journey: tourists spend at least one night at their destination.
3. We lack uniform data on excursion flows for all European countries, despite their importance.
4. Definition accepted by the UN.
5. From 1993 on, the survey was extended to a number of eastern European countries, including Bulgaria, Romania, Poland, Hungary and the former Czechoslovakia. For reasons of uniformity and the differing tourist traditions in the countries of eastern and western Europe, we will confine most of our comments to the EU and EFTA areas.
6. For 2010, WTO estimates that international flows in Europe will total 1 billion, or 52 per cent of all flows.
7. Leaving aside tourism for cultural and religious purposes, which goes back to ancient times.
8. Tourism is very closely related to the accommodation market: here too, international firms throughout the world have set up types of hotel to appeal to a segmented customer market. The marketing techniques of the major hotel chains have been extremely effective.
9. In most European countries, the number of two-income households outstripped the number of single-income households in the 1970s.
10. Frontier Surveys -- Tourism Directorate, France, 1996.
11. This rate of air use by the British has remained more or less constant since 1988.
12. The classification is based on factorial analysis and ranked by order of significance.

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NETHERLANDS

**Henk MEURS**  
**MuConsult**  
**Amersfoort**

**Nelly KALFS**  
**Ministry of Transport, Public Works and Water Management**  
**Transport Research Centre (AVV)**  
**Rotterdam**  
**Netherlands**



# LEISURE AND VACATION: A FORGOTTEN TRAVEL MARKET?

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## 1. INTRODUCTION

In both research and policymaking a great deal of attention is paid to commuting and business travel. Much less importance is attached to social and recreational travel. There are a number of reasons for this. One is that as far as policy is concerned, traffic congestion -- largely caused by a concentration of commuter and business journeys in the rush hourlies at the centre of attention for many West European countries. In this frame of reference, social and recreational travel, which only causes congestion in particular periods and in specific locations, seems less important. Apart from these more policy-directed reasons, limited attention for social and recreational travel from researchers is due to the following:

- The concept of recreational travel itself is difficult to define;
- Recreational travel involves a great heterogeneity of purposes and, consequently, of the demographic characteristics of the people making the journeys;
- Recreational travel has a less rigid pattern than commuter travel. Moreover, the destinations are very heterogeneous and are strongly connected with the time of the year and the weather. In addition, the available data contains many uncertainties.

Despite this, the relative lack of attention given to this part of the transport market is far from justified. On the contrary: while commuter traffic accounts for only some 20-25 per cent of total travel, social and recreational travel represents 40-50 per cent. For international travel, the contrast is even stronger. In 1989, holiday travel accounted for 73 per cent of international journeys. Another 11 per cent of journeys were for visiting friends and acquaintances and only 16 per cent were for business purposes (Potier *et al.*, 1993). This also means that social and recreational travel is creating considerable environmental costs. The economic importance of these journeys is also large: in 1991, 1.6 per cent of the GDP of the European Union came from international tourism and, for some countries, this figure was as high as 6 per cent (WTO, 1993). The number of arrivals in the tourist sector is currently growing at about 3-5 per cent annually (OECD, 1996).

Social and recreational travel is expected to continue growing, partly due to decreased working hours and the consequent increase in leisure time. At the same time, there is an ongoing internationalisation of non-work-related travel. Alongside this increase in the *amount* of leisure travel, the nature of leisure travel is also undergoing changes. Increased flexibility of labour may lead to the emergence of other ways of using free time than those associated with the traditional weekend and vacation travel. If the economic and environmental objectives of transport policy are to be realised, more reflection on leisure travel will also be necessary on the part of both government and businesses that provide transport services.

The aim of this contribution is to provide an overview of developments in social and recreational travel and of how these are expected to change in the future. Implications will then be drawn from this for transport policy:



- What concepts and definitions play a role in the study of leisure travel?
- What changes are occurring in the nature and extent of peoples' free time? What seems to be the effect of this on their travel behaviour?
- What changes are happening in the two most important market segments -- recreational day trips and tourism?

The view will be advanced that social and recreational journeys deserve more attention, and that this travel sector will need a special approach on the part of both researchers and policymakers. Moreover, researchers will need to tailor their use of data in this area for analyses designed primarily to acquire insight into the specific characteristics of the sector. For policymakers, by which term is understood both public authorities and other providers of transport, the task will be to use the best available information to provide services well-tailored to the special needs of the leisure consumer. This paper will demonstrate that these needs differ from those of the regular commuter.

## **2. DEFINITIONS AND DATA**

In this contribution, the term "leisure time" will be understood to mean all the time a person does not devote to ensuring their future welfare in a broad sense. This means that activities carried out to obtain income, to keep a household in order and to look after the person's physical well-being cannot be considered as taking place in free time. Free time is therefore more limited than time that is not spent doing paid work. In other words, quite apart from "official" work time, time spent on necessary chores also has to be left out of the concept of free time. It can be seen from this that the concept of "enjoyment" should be the *sine qua non* of any viable definition of free time.

This definition of free time is far from perfect: for example, the fact that eating out is considered to be taking place in free time while eating at home is not. Then again, voluntary work can also be seen as a free-time activity, but that does not take away from the fact that it is also work. Nor should it be forgotten that many people find pleasure and fulfilment in their jobs. Some writers have pointed to changes in which activities that had previously never been seen as leisure activities are now starting to be considered as such. One example is shopping. This was once seen primarily as a strictly utilitarian activity for keeping body and soul together but which, in some aspects at least (e.g. "fun shopping") is taking on the form of a leisure activity.

Leisure travel in this definition therefore consists of all journeys not specifically made with the purpose of providing for the person's future welfare or even for sustaining a normal life. There is, in other words, no future penalty for not making these journeys. However, this study will limit itself to those journeys made for social and recreational purposes. Consequently, the terms "leisure travel" and "social and recreational travel" will be used interchangeably.

## **2.1. Characteristics of leisure travel**

Leisure travel is, by its very nature, extremely heterogeneous. Nevertheless, a number of aspects can be distinguished:

- Purpose. In the first place, a distinction can be made between social and recreational travel. Social travel involves visits to family and friends while recreational travel involves travel for relaxation or excitement in a general sense. A great diversity of sub-purposes, however, fall into both categories. For this reason, the Dutch study of same-day recreational travel distinguished more than forty such sub-purposes;
- Number of overnight stays. Here, a distinction is made between day trips (no overnight stay), short stays (one to three nights spent away), short holidays (three to five nights away from home) and long holidays (more than five overnight stays). In addition, a distinction is made between short trips (up to two hours) and day journeys (more than two hours);
- Role of journey. A distinction is also made between a journey made expressly to get to a certain destination and a journey that has a recreational value in itself, such as going somewhere by way of the scenic route;
- Destinations. A further distinction is made between social and recreational journeys that are local, regional, national and international.

This heterogeneity suggests that it would not be easy to identify distinct sectors which could be separately influenced by policy instruments. Most prominent is the contrast with commuting, where there is a pattern of fixed destinations and time of day where the journeys need to be made. Generic policy has therefore little chance of connecting with the specific characteristics of leisure travel.

## **2.2. Data**

Research into leisure travel is not simple, if for no other reason than that there is no single source which can provide data on all the important aspects of this type of travel. This means that the research is necessarily based on very heterogeneous information. To gain insight into social and recreational travel and possible ways of influencing it, data will be needed that can do justice to the great diversity of journeys which come under this heading.

With respect to the changing nature of leisure time, some use can be made of time-use surveys. In these surveys, people are asked to keep a diary of all their activities over one or more days. Studies like these have been carried out in several European countries and increasing attention has been given to carrying out similar surveys at a European level. The main disadvantage of this source for studying social and recreational travel is that social and recreational activities are only part of the broad picture of daily activities and are therefore often lumped into very broad classes of activity. It is also a source of data that only records day-to-day activities and consequently misses less frequent events, such as day trips and holidays.

In some countries, data on recreational activities is collected from the perspective of tourism. One example of such a survey is the *Onderzoek Dagrecreatie* (“Recreation Survey”), held every five years in the Netherlands, in which detailed information is collected on journeys made for recreational purposes that do not involve an overnight stay somewhere.

In addition to these “touristic” surveys, many countries also carry out surveys of vacationing behaviour. Every year, the Dutch Central Statistical Office (CBS) collects information for its Ongoing Vacation Study and essentially similar studies are carried out in other countries. In Germany, this is the *Urlaub und Reisen’s Reiseanalyse* and then there is the Tourism Monthly Survey in the United Kingdom and the *SOFRES-Direction du Tourisme* monthly survey in France. In addition to this, at least three international organisations — IATA, WTO and OECD — also collect tourist information. Useful as they are, such surveys do not focus on travelling behaviour, which therefore plays a subsidiary role.

Some European countries collect border crossing information. This involves asking travellers about the reason for their journey. Although these surveys do provide insights into the *extent* of international social and recreational travel, the questions asked are too limited for the information gained to be used as the basis for policy development.

A better source is the European Travel Monitor (ETM) of the European Travel Data Centre (ETDC), which has monitored the international travel market at a European level since 1988. This has involved following 150 000 people aged 15 and over. This source, unfortunately, also has its drawbacks for our purposes, most notably the fact that it only registers journeys of more than one day, while -- as will shortly become clear -- day trips make up a considerable part of international social and recreational travel.

### 3. DEVELOPMENTS IN LEISURE TIME

#### 3.1. Developments in working time

One of the most important things to have an effect on leisure time concerns changes in working time. Table 1 shows changes in the length of the average working week for five EU countries, together with the average for the EU as a whole.

Table 1. **Changes in the basic working week**

Country	Men			Women			Total		
	1983	1988	1993	1983	1988	1993	1983	1988	1993
Belgium	42.1	40.9	40.3	36.6	34.6	33.2	40.2	38.6	37.4
Germany	42.7	42.0	40.9	35.4	35.1	33.7	39.9	39.3	37.9
France	42.4	42.3	41.7	36.8	35.9	35.2	40.1	39.5	38.7
United Kingdom	44.2	45.1	44.3	30.2	30.6	30.5	38.5	38.9	38.1
Netherlands	41.9	38.0	38.1	29.1	26.0	25.5	37.7	33.6	33.1
EU 12	42.8	42.5	41.9	34.6	34.6	33.9	39.7	39.5	38.6

Source: Eurostat, Labour Force Survey.

From Table 1 it can be seen that in the ten years from 1983, most EU countries saw a reduction in the normal working week. This change was brought about partly by a fall in the number of hours in a full-time working week and partly by an increase in the number of part-time workers. Between 1983 and 1993, the representation of part-time workers in the labour force grew from 8.1 per cent to 12.8 per cent for the EU as a whole. Some 30 per cent of women and 3-4 per cent of men in the EU work part-time. The reduction in the working week is largely the result of negotiations between employers and employee organisations. A 35-hour basic working week, five weeks holiday per year and pension rights have been the central aims of the European labour unions since the end of the 1970s.

Aside from the length of the working week, the number of days off is also important. Table 2 shows the average for the total number of free days for five countries.

**Table 2. Number of free days per year (1989)**

	<b>Japan</b>	<b>USA</b>	<b>UK</b>	<b>Germany</b>	<b>France</b>
Weekends	85	104	104	104	104
Public holidays	20	9	8	11	8
Paid holidays	9	16	24	29	26
Absence	3	6	11	11	16
Total	117	135	147	155	154

*Source:* Nishi, 1993.

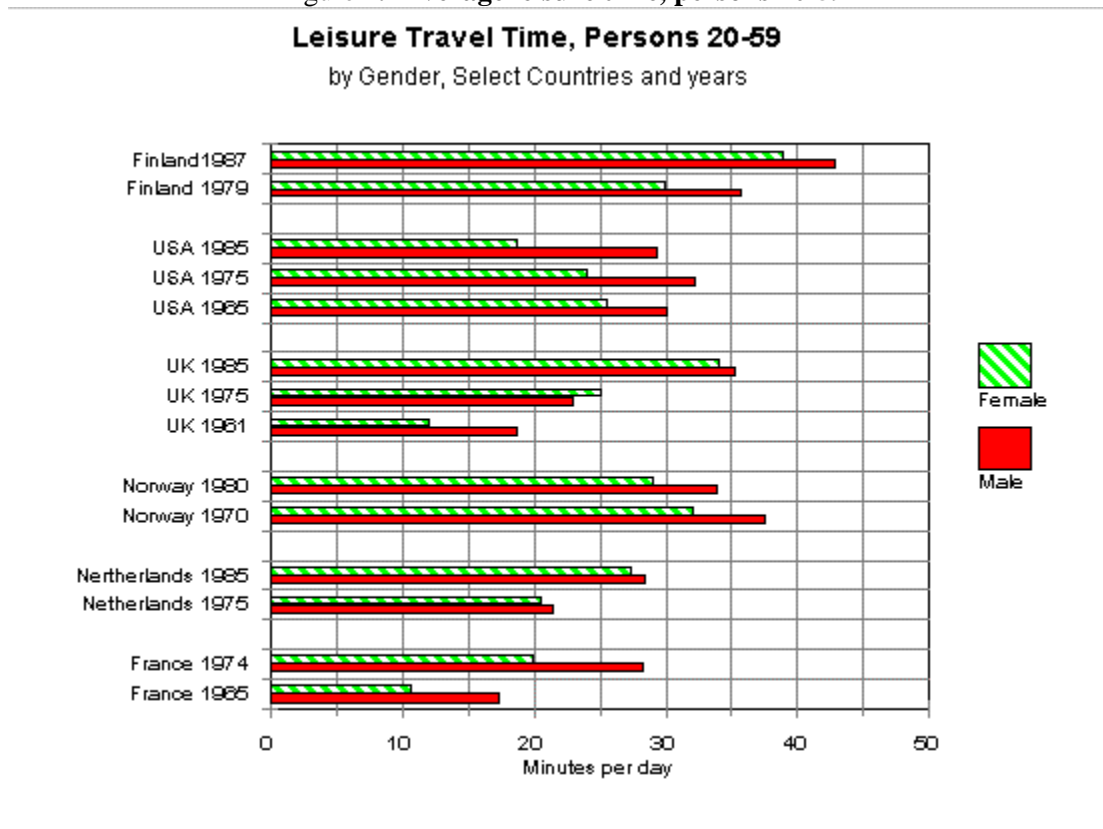
From Table 2 it is clear that there are substantially more holidays in Europe than in Japan or the United States, and there is also more time taken for sick leave. Changes in the number of working hours support this picture. On the basis of data provided by Beeker (1991), it appears that between 1950 and 1990 the average basic working week in Europe shrank by between 15 and 20 per cent while that in the United States fell by only 7 per cent. Gratton (1996) proposed that productivity increases in the US have mainly been used to increase purchasing power, while the same steady increase in productivity in post-war Europe was mainly used for a reduction in working time. The larger number of holidays in Europe has naturally had major effects on tourism and forms the main explanation for the conspicuous extent of the tourist industry within Europe. This matter will be treated in more detail in Chapter 5.

### **3.2. Total free time**

The developments noted above lead inevitably to the conclusion that non-working time has increased over recent years, carrying with it the implication that leisure time must have increased alongside it. In what follows, we will try to establish to what extent a decrease in total working time has actually been accompanied by an increase in leisure time, using the definition of leisure time described above.

The figure below shows changes in the amount of free time in different countries. It can be seen that the Dutch appear to have the most free time (390 minutes, or 6.5 hours per week), while the French and Norwegians have the least. What is particularly striking about these figures is that the trend for free time is not moving in the same direction in all these countries. In Finland, Norway and the Netherlands, the amount of free time is decreasing, while the United Kingdom saw an increase in free time during the 1980s. It is possible that the economic situation, e.g. high unemployment rates in the UK at that time, played a part in this.

Figure 1. Average leisure time, persons 20-59



This discrepancy between a general decrease in working time, on the one hand and, on the other, the more complex pattern of change in the actual amount of free time that people have, is due to a number of explanations:

- To calculate working time, we use figures based on formal agreements between employers and employees. In time-use studies, on the other hand, which show the number of hours actually worked, it is often observed that the actual number of working hours lies somewhat higher than that found in employment contracts as a result of overtime and other effects (Roberts, 1998);

- The increased participation of women in the labour market in many West European countries has led to a changed division of labour within the household, which, in turn, has led to an increase in the number of hours men need to devote to household tasks;
- Increased commuting distances have led to an increase in the amount of time spent travelling. This then cuts into the amount of available free time.

From the above, it can be seen that the idea of an increase in leisure time is not unambiguously supported by the results of time-use research. In fact, Tyrell (1995) claimed that full-time employees in the UK had actually seen an *increase* in their working week. This trend has also been noted in other countries. Nevertheless, many researchers regard a trend towards fewer working hours as the most likely outcome in the long term (Gershuny, 1992; Boulin, 1998). Boulin concluded that working times would become more flexible. They would also be negotiated on an individual basis, thereby allowing them to better fit to the needs of individual employees. Developments such as part-time work, early retirement and career breaks would play an important role in this.

### 3.3. Characteristics of the use of free time

Alongside these changes in the amount of free time, there is also the *nature* of the free time to consider. The most detailed figures for this are for the Netherlands. These are given in Table 3.

Table 3. Use of free time in hours per week by locations in the Netherlands

Location	1975		1985		1995	
	Absolute	Per cent	Absolute	Per cent	Absolute	Per cent
Home	29.6	67.3	30.3	66.2	27.3	64.5
Neighbourhood	8.7	19.8	9.2	20.1	8.5	20.1
Outside neighbourhood	5.7	13	6.3	13.8	6.5	15.4
Unknown	1.3	-	0.3	-	1.8	-
Total:	45.3	100.1	46.1	100.1	44.1	100.0

Source: Compiled by TBO.

It can be seen that between 1975 and 1995 people began to spend less of their free time indoors. There are also indications that the same period saw people spending more time outside their immediate neighbourhood, one result of which was an increase in distance per journey. A shift in the pattern of social contacts, from visits to friends and family to recreational activities, can also be noted, although there is, of course, nothing to stop these activities from being combined.

Table 4 shows that the number of recreational journeys increased strongly in the period 1975-95, while the number of journeys with social contact as the purpose fell somewhat. These developments are in line with the predictions of Linder (1971). He predicted that increasingly capital-intensive forms of recreation would arise as a result of the rise in incomes. This is well illustrated by the fact that, between 1979 and 1989, expenditure on leisure time activities in the UK rose by 50 per cent,

while the amount of free time available to spend it in rose by only 2 per cent (Roberts, 1998). He went so far as to propose that this discrepancy had contributed to our perception of living in a hectic society.

**Table 4. Number of journeys per person per week by journey purpose in the Netherlands**

<b>Category</b>	<b>1975</b>		<b>1995</b>	
Recreational	1.2	100	1.68	140
Social contact	1.7	100	1.65	97
Other	1.94	100	1.78	92
Total	4.85	100	5.11	105

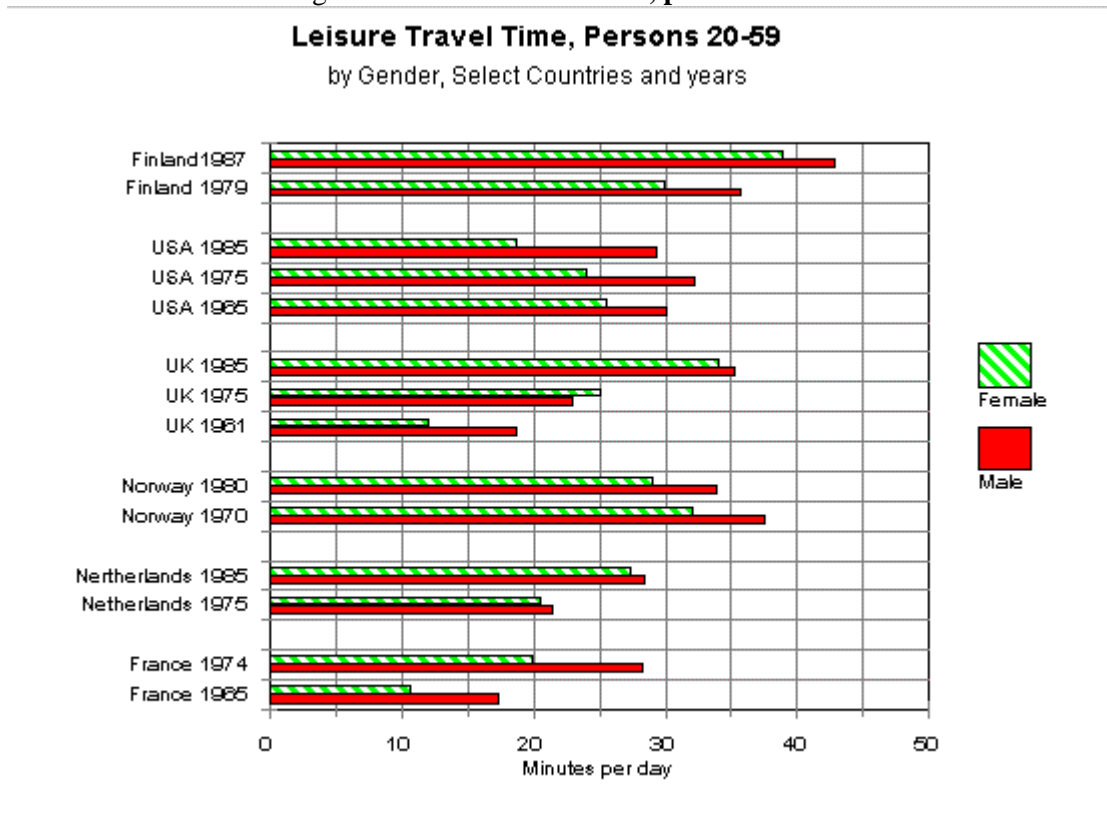
*Source:* Compiled by TBO.

### **3.4. Implications for mobility**

Developments in journey times made for social and recreational purposes show that the time used for leisure travel increased in all three countries despite the fact that the total amount of free time remained more or less constant in Finland, Norway and the Netherlands during the period studied. The same sort of rise was also seen in France and the United Kingdom. Some other patterns also stand out: in the United States between 1965 and 1975, journey times for leisure travel for women rose while those for men actually fell. For women, this rise in journey times for leisure travel has been steady and protracted. However, in Norway, journey times for leisure travel fell slightly over the same period.

Data is available for the Netherlands on the (changing) mode of transport for leisure activities. The average Dutch person spent 43 per cent of the total distance they covered for social purposes as a driver, 36 per cent as a car passenger, 13 per cent by public transport and 8 per cent by other means. Over the past 5 years there was a rise in the number of kilometres covered in social leisure journeys as a driver and a fall in the distance covered for social leisure journeys as a car passenger. The clear implication from this is that car occupancy fell. For recreational trips, 33 per cent of the total distance for each person is covered as a driver, 32 per cent as a passenger, 9 per cent by public transport and 21 per cent by bicycle. In the latter case, it was predominantly younger people who decided the mode of transport.

Figure 2. Leisure travel time, persons 20-59



### 3.5. Future developments

Changes in leisure time patterns are determined to an important degree by the changes in working time and how it is organised. This is the result of a number of developments:

1. A further increase in the participation of women in the workforce. This implies that the present changes in the division of labour within households will continue for a number of years;
2. Development of more flexible working practices. Many labour experts are predicting that in the future, workers in the EU will have to accept a more irregular pattern of work in order to deal with fluctuations in production. The implication of this for leisure time is that people will experience periods where they have little free time alternating with periods when they have a lot of it;
3. Part-time work. There will be an increase in the number of people who work for less than the basic working week in their sector. This development is expected to level out for women but more men will also begin to work part time in order to have the time to look after children in many West European countries;



4. Reduction in total working hours. It is expected that the amount of non-working time will increase, albeit at a rate that is difficult to predict. Despite this overall trend, there are some parts of the labour market where the working week is increasing. It is possible that this will be compensated by a concomitant increase in the number of holidays, which should then act as a stimulus for tourism, particularly for short trips;
5. Distribution of labour over life span. Increasing educational levels will continue to cause young people to enter the workforce later. Peoples' working lives are also being shortened at the other end of the age spectrum as more take early retirement. The net result of these trends is that work is becoming steadily more concentrated in a relatively short period of peoples' lives, although no doubt the sobering effects of an ageing population and a simultaneous decline in the number of young people will act to counterbalance this trend;
6. Distribution of labour over the day and over the days of the week. Important changes are occurring in this area in a number of countries. The normal nine-to-five, five-day working week is increasingly having to move aside in favour of work being spread over six or seven days and at times anywhere between 8 a.m. and 8 p.m. Discussions in the Netherlands about extending the opening times of shops, banks and public services are examples of this trend. One consequence of this is that free time will become less concentrated in the weekend. The distribution of free time over the week will thereby change considerably.

These developments will all have important effects on the way people organise their free time:

1. A continuing increase in leisure traffic;
2. Continuing individualisation of the way free time is used, particularly in families where the working adults have conflicting work schedules. The fact that this individualisation will lead to an increase in car-based mobility will undoubtedly also lead to reduced car occupancy;
3. Longer periods of leave could lead to more leisure travel, particularly for longer journeys;
4. Changes in the distribution of leisure travel over the week and over the day. It will become harder to influence these developments by way of generic policy. In what follows, a number of examples will be given of the sort of policy tailoring needed to get some purchase on these differentiated developments.

There have also been developments that have significantly affected leisure travel. These include:

1. An ageing population. The elderly of the future will be more likely to have cars and driving licences (MuConsult, 1998);
2. Increased real incomes and accumulated wealth. People with higher incomes and the ageing population with accumulated wealth spend more of their free time outside the home and travel further.

Put together, all these changes seem to imply that leisure travel in the future will increase at a faster rate than the expected increase in leisure time.

## **4. DEVELOPMENTS IN RECREATIONAL TRAVEL (DAY TRIPS)**

From the above, it should be clear that journeys made for recreation have increased relative to journeys made for social reasons. This increase is expected to continue as a result of developments in both supply and demand. In this chapter, a number of developments in same-day recreational journeys will be sketched out. Same-day recreation is defined here as consisting of journeys of a minimum of two hours and a maximum of 24 hours, provided this does not involve an overnight stay. Mobility aspects will also be examined. For this, we will be making use of the Dutch situation, because the information is available from the *Onderzoek Dagrecreatie* ("Recreation Day Trips Survey").

### **4.1. Developments in demand**

The research shows that most journeys made in free time are used for visiting sports facilities and city and town centre amenities. Some 32 per cent of such journeys involve destinations in the city or town centre for recreational shopping and visiting eating establishments of one sort or another. Another 21 per cent of these journeys are used for getting to sports facilities and 8 per cent for visiting areas of natural beauty. Day trips for getting to attractions and events make up a rather small proportion of the whole. It is also interesting that visits to attractions are increasing less rapidly than visits to events such as sports fixtures, trade fairs and exhibitions.

Although this picture is confirmed when we look at the total number of kilometres travelled (MuConsult, 1997), in terms of kilometres travelled per journey type, the greatest distances covered in single journeys are for visiting attractions (139 km). Visits to city and town centres (70 km), sports facilities (34 km) and areas of natural beauty (62 km) involve, on average, much shorter journeys.

The proportion of day trips made by car is strongly dependent on the purpose of the journey. Some 65 to 75 per cent of visits to special events, sports facilities and other recreational destinations are made by car. This figure is much higher than for visits to city and town centres and to areas of natural beauty (45-57 per cent). It is likely that the quality of available alternatives to the car is at least one cause of this difference. An analysis by Hanemayer (1988) of the modal split for 30 amusement parks found that the better the access by public transport, the greater the proportion of visitors who used it. Day-trip attractions are, in general, rather poorly connected to public transport. This suggests that here, at least, the provision of attractive alternatives could reduce the part played by the car in recreational travel.

### **4.2. Future developments**

MuConsult has developed a number of scenarios for the possible future development of same-day recreational travel (1997). The most important issues covered in the scenarios are:

1. Demographics and economics. Specifically, an increase in the elderly at the same time as the number of young people is falling. The rising number of old people will increase the use of civic amenities, while the decline in the number of young people will probably have a

negative effect on the use of amusement parks and recreational facilities. In addition, increasing incomes will mean that, even where relatively less free time is given over to day trips, more money will be spent on them;

2. Social and cultural values. This concerns the role played by how people in the future will value consumption as opposed to culture or the beauty of the natural world. A consumption-orientated or materialistic lifestyle can be expected to encourage visits to attractions and events, while a change in the other direction would see a relative increase in the number of visits to town and city centres and areas of natural beauty;
3. Individualisation. A reversal of this process in favour of increased social solidarity would tend to promote visits to friends and family and people would also spend relatively less of their free time outside the home. However, in a society that places more value on the satisfaction of individual desires, the opposite could be expected to happen.

Several scenarios were set up based on the above characteristics and the resulting effects for mobility growth for each scenario were estimated. The results can be seen in Table 5.

**Table 5. Resulting effects for mobility growth for different scenarios**

	<b>Index</b>
Open air recreation	127-139
Recreation parks	114-124
City or town centre	114-137
Attractions	93-113
Social	111-128

The possible geographical spreading out of recreational facilities has not been taken into account. In all scenarios it was predicted that open-air recreation would grow – a development strongly driven by the increasing number of old people. Town centre recreation would also gain from the larger number of old people. The implication of this for transport policy is that it will become more important to provide public transport facilities to town centres and open air recreation.

### **4.3. Mobility**

It has been shown that the role of the car in recreational travel is very high. There appear to be a number of factors underlying this development:

1. Supply. The lack of alternative modes of transport to recreational facilities has often been pointed out. There is also a lack of good cycle paths between housing and local recreational areas. Everts (1990) described the accessibility of recreational facilities by bus as being in a sorry state and many amusement parks are hardly reachable by public transport at all. It can therefore be said that availability plays an important role alongside travel time in the tendency to favour the car as a way of getting to recreational facilities. The disadvantage of public transport is that it is not available everywhere and at every time of the day or night.

2. Price. When people go out for recreation they tend to go out in groups. This will tend to make travel by car more attractive, especially for longer journeys.
3. Attractiveness. The quality as well as the price of public transport is also of importance. Attractiveness involves such aspects as door-to-door travel times and comfort.
4. Travel information. It is relatively easy to get somewhere by car, even if it involves a one-off destination you have never been to before -- you just need to be able to read a map and follow road signs. To get there by public transport, on the other hand, you will often need to obtain and interpret a train or bus schedule.
5. Flexibility. The lack of flexibility of trains and buses has also been mentioned. There is only limited room to provide for extra demand on busy days such as public holidays, and providing special trains or buses to order only happens for very large events.

All this leads to many kilometres being travelled by car, with all the energy use and environmental problems this entails. It also leads to increased congestion, especially on peak days and on the roads leading to beaches and large attractions. This congestion results from the limited capacity of the road network relative to the amount of traffic trying to get onto it and to the limited quality of alternative modes of transport. This congestion naturally also affects the quality of the touristic “product”.

The specific nature of this type of recreational travel requires a special policy directed at reducing the use of the car. Essential elements of such a policy would include:

1. Transportation tailored to the specific needs of the travellers and the nature of the places they wish to visit. For example, congestion of city centres could be reduced by arranging for special “shopping buses” to leave from transfer points at the edge of town. Experience with this system in Utrecht in the Netherlands has shown that this system can be effective;
2. Public transport where it’s needed, when it’s needed. The demands placed on mobility by large-scale events are rising rapidly. Often the demand is for special transportation at unusual times or on unusual days. Event organisers admit that this sort of one-off, large-scale demand is hard to meet using public transport;
3. Provision of transport as part of a complete recreational package. The trip then begins as soon as the person closes their front door behind them. The companies offering these packages would have to be able to respond with specific, well-targeted products.

It can be recommended therefore that specific recreational attractions put together special transport packages in collaboration with transport providers. One such scheme is the Mobility Plan for the Veluwe – a large area of open countryside in the eastern Netherlands much visited by tourists. The plan consists of a set of proposals in which public authorities, those in charge of facilities and public transport companies come together with the aim of getting visitors out of their cars. The plan includes, amongst other things, the following schemes:

1. The “Day Tripper”. This is a special bus that links camp sites and other holiday residences to the various attractions in the area;
2. The “Holiday Transport Card”. This scheme provides holidaymakers with an easy way to buy a bus pass, valid throughout the area;
3. Improved facilities for cycle hire and special cycle routes.

Evaluation of the plan has shown that carrying out a number of well-targeted measures can generate substantial mobility effects.

Another example of transport policy directed at problems created by recreational travel concerns mobility on the roads to and from large attractions, where there is often heavy congestion at peak times. The problem very often lies in the fact that these parks are usually located at long distances from the main population centres. Provision of co-ordinated public transport services as supply chains may improve competitiveness. Characteristics of such a new organisation of public transport are:

1. Adjusted timetables allowing trains and buses to link up;
2. Trains and buses are made compatible in terms of comfort;
3. Train to bus through-ticketing is made available.

Such developments may provide a serious alternative for the car in getting to these places. If successful, this would also be in the interests of the attractions’ owners, as congestion only makes the attraction less attractive and creates great demand for parking space around amusement parks.

## **5. DEVELOPMENTS IN TOURISM**

According to an estimate by the World Tourism Organisation (WTO), a world-wide total of 594 million tourist arrivals was registered in 1996, representing an increase of 75 per cent over the previous ten years. Annual growth of tourism of all sorts is 4.6 per cent (WTO, 1997) globally and 6.2 per cent for western countries. Europe plays a large role in this, although its share of the world’s tourist arrivals has fallen from 72 per cent in 1960 to 60 per cent in 1996 (source: WTO, 1997). This does not represent an absolute fall in tourism in Europe, but is rather the result of a world-wide diversification of destinations. This can be illustrated by the fact that European tourism to Asia and North America rose by about 10 per cent between 1985 and 1995 (source: WTO, 1997). Nevertheless, 74 per cent of arrivals of European tourists remain in Europe. The overall conclusion then is that international tourism has experienced strong growth, with travel to further destinations growing fastest.

### **5.1. Differences between countries**

If we look at developments in the various European countries, the following matrix can be drawn up:

**Table 6. Average percentage growth in the number of arrivals from other European countries in the period 1986-96**

Origin	Destination				
	NW Europe	North Europe	South Europe	Central-Eastern Europe	East Medit.
NW Europe	3.1	7.5	3.5	21.8	7.0
North Europe	4.3	4.0	3.5	8.4	9.4
South Europe	7.5	8.4	6.3	5.6	30.5
Central-Eastern	17.4	31.8	0.6	8.3	6.9
East Medit.	1.7	28.6	0.6	2.6	8.2
Europe Total	4.3	6.5	3.0	10.8	9.0

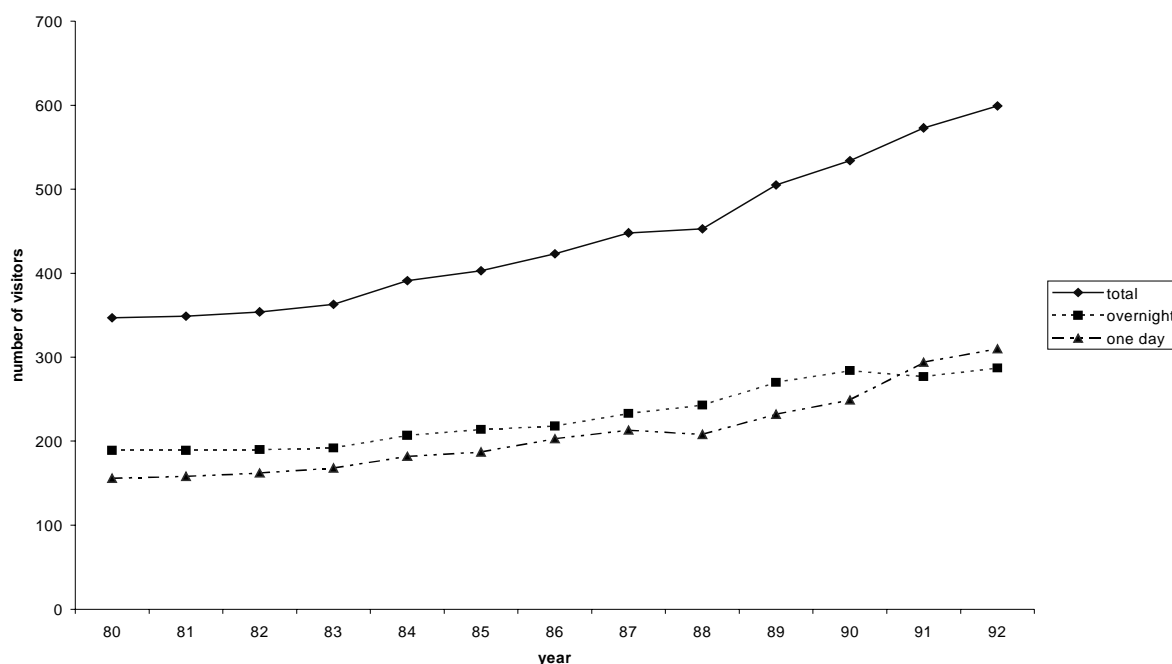
Source: WTO, 1997.

From Table 6 it can be concluded that tourism within Europe grew strongly in the period 1986-96, particularly in eastern and central Europe and in the countries around the eastern Mediterranean. Further examination reveals that tourism in countries such as Italy, Austria, the UK, Spain and Switzerland grew more slowly (*source*: WTO, 1993). There therefore seems to have been a shift in tourist destinations from western to eastern Europe.

## 5.2. One-day versus multi-day trips

In the study of international travel, a distinction can be drawn between people who stay less than a day in a country and those who make at least one overnight stay there. Developments in Europe for both types of journey are given in Figure 3.

**Figure 3. Developments in number of visitors in total and by overnight and same-day visits**



This figure shows that of all international visits within Europe, about half are of the one-day variety. These are predominantly visits to neighbouring countries for shopping, recreation or other forms of tourism (source: WTO, 1993). The number of one-day international journeys doubled in the twelve years between 1980 and 1992, with an average growth of 4.8 per cent per year. This is a higher rate of growth than for multi-day foreign trips (3.5 per cent).

### 5.3. Destinations within western Europe

The table below shows the most important tourist destinations for countries within western Europe.

Table 7. **Number of tourist arrivals in European countries, 1980-92, from Europe and the rest of the world**

Country	1980	1992	Per cent growth per year
France	30 100	58 500	5.7
Spain	23 403	36 054	3.7
Italy	22 087	26 974	1.7
Hungary	9 413	22 500	7.5
Austria	13 879	19 098	2.7
UK	12 420	17 855	3.1
Germany	11 122	15 950	3.1
Europe Total	189 830	287 529	3.5

Perhaps the most important thing to note from this table is that the countries of southern Europe have remained the main hosts for foreign tourists. More recently, there has been a rise in tourism to central European countries such as Hungary. The most important sources of tourists remain the north- and north-western European countries, principally Germany, the Netherlands and Scandinavia. Although many southern Europeans still spend their holidays in their own countries, the end of the 1980s saw a sharp rise in the number of southern Europeans visiting northern Europe.

### 5.4. Mobility

As was mentioned in the introduction, the international travel market is dominated by tourism - of the total number of multi-day international journeys, about 74 per cent were for holidays and 11 per cent for visiting family or friends (Potier *et al.*, 1993). Research into all international journeys - including one-day trips abroad - has confirmed this picture. For example, of the total number of kilometres travelled to and from Germany in 1991, 62 per cent were for holidays, 7 per cent were for visiting friends and family and only 30 per cent were for business (Intraplan, 1995). The social and recreational sector, therefore, is very important with respect to international travel.

If we now look at the part played in international travel by different modes of transport, we see that Potier noted a dominant position for the car in international journeys made for holidays (45 per cent by car) and for visiting friends and family (55 per cent by car). About a third of all international journeys were made by air. For short holiday or city breaks, travel by coach becomes significant (30 per cent) and more use is made of air travel (45 per cent).

For Dutch people, at least, a meaningful distinction can be made between short and long holidays in terms of the mode of transport selected (CVO, 1996). For long foreign holidays, the car was the favoured mode of transport (54 per cent), followed by aeroplanes (28 per cent) and buses (12 per cent). Train usage for this type of journey was rather low (3 per cent). The popularity of air travel for long holidays abroad has grown, which can be attributed to a combination of falling air fares and tourist development of places further afield. The car is also the preferred choice of transport for short, international holidays (65 per cent), followed by tour buses (15 per cent), trains (5 per cent) and aeroplanes (5 per cent).

Information is now available for Germany in 1991 about the use of different forms of transport for holiday journeys, in this case in the form of distance travelled. About 85 per cent of total kilometres travelled were by aeroplane and 12 per cent covered international holidays by car. In the case of international travel for meeting friends or family, however, the situation was reversed, with 65 per cent of the total distance covered by car and 18 per cent by air. These journeys were generally shorter than those made when travelling abroad for holidays.

Predictions of the distances travelled to and from Germany have been made for the year 2010. It was estimated that international holiday traffic, calculated in total number of kilometres covered, would grow by about 65 per cent between 1991 and 2010. International travel to visit family and friends was estimated to grow over the same period by 40 per cent (source: Intraplan, 1995). The most important growth areas would be the travel by train and by aeroplane. The predicted growth for the use of trains is closely dependent on the growth of the high-speed train network. Future growth in the use of air travel is mainly expected to come from falling air fares as a result of deregulation.

From these analyses it appears that, with regard to international travel, it is the growth in passenger aviation and the popularity of the car which will create the main problems for policymakers. Part of this growth should be taken up by the arrival of a network of high-speed rail links. This development will mainly affect relatively short holidays to cities. This growth is expected to work at the expense of the car, aeroplane and touring car. Some other important problems include the ever-increasing distances that people travel for holidays. Over these distances, the aeroplane is often the only practicable way of getting there. In addition, it is expected that the current spread of tourists over Europe will continue at the expense of the traditional pattern of north Europeans heading for the beaches of the Mediterranean.

## **5.5. Transport policy**

From the point of view of transport policy, it is important to push back the pre-eminent role of the car and aeroplane in favour of travel by train and bus. It is also in the interests of the tourism and recreation sectors themselves that a good mobility policy is in place. People travelling for recreation are, after all, often seeking rest and space in a natural setting. The probable expansion of tourism to a



global phenomenon can only be at the expense of the attractiveness of European tourist destinations. An attractive transportation system is an important way of providing a viable alternative to the heavy environmental impact of cars and aeroplanes.

The best prospects for this seem to lie in the following market sectors:

1. Same-day trips. These currently form half of all international tourist journeys. They are relatively short journeys. The role of rail and bus travel in journeys of this sort can be promoted at the expense of travel by car by increasing the attractiveness of these modes of transport. One way to do this would be to offer travellers the possibility of “linked journeys” in which the traditional distinction between the different forms of public transport would fall away. These linked journeys could be offered by travel agents. This would make it possible to provide an integrated system for ticket sales and the provision of travel information. There has been a positive experience with this approach for the domestic travel market in the Netherlands. It would be a major task to develop a policy for providing such packages internationally, but a worthwhile one nevertheless.
2. Short-distance holidays by air. To provide an effective alternative for air travel in this sector, a pricing policy will be needed in addition to providing an attractive alternative. At the moment, air travel is favoured by being exempted from duties on fuel and by air tickets being zero-rated for VAT. Remedying this situation, at least within Europe, would help to promote fair competition between different modes of transport.
3. Closer co-operation will be sought between the various parties active in the transport market. Providers of rail and bus services will therefore need to forge stronger links with travel agencies.

## **6. CONCLUSIONS**

It should be evident by this stage that social and recreational travel comprises a considerable part of the total. Its economic role is also highly significant, accounting for at least 75 per cent of market in international travel. It can also be expected that changes in the labour market will lead to a growth of travel for social and recreational purposes in the coming years and that the nature of such journeys will also change.

For the future, it is clear that the growth of social and recreational travel will require measures specifically tailored to this market segment. These measures will have to take into account the heterogeneous nature of the sub-purposes involved in this sector and the irregular pattern of starting points and destinations that characterise it.

A number of recommendations can be made:

1. Research. Insights into domestic and international social and recreational travel are hindered by the lack of the right sort of data. There are many sources of data on social and recreational travel but none of them do justice to the heterogeneity of these journeys and

there is, as yet, no international co-ordination in the collection of data. In addition, the extensive collection of data by tourist organisations pays little attention to the travel aspects of tourism.

2. In many ECMT countries, transportation policy is primarily directed at business and commuter traffic. The large proportion of traffic generated by social and recreational travel means that policy directed specifically at this sector will have to be developed if the economic and environmental objectives of the transportation policies of these countries are to be realised. The development and co-ordination of international transport policy with respect to tourism is still in its infancy.
3. There is a need to develop policy to counteract the growing role of aviation in this sector. Next to the development of alternatives for the aeroplane for short and middle distances (such as international transportation management), the need to regularise taxes and duties will be unavoidable. Without this, the effects of deregulation will lead to large reductions in air fares and thereby further worsen the competitive position of trains and buses. For example, taxation on kerosene and VAT on tickets are required
4. There will have to be more and closer cross-border co-operation between transport providers if attractive and well-integrated transport packages are to become available to tourists. The development of supply chains, with integration of tariffs, ticketing and the provision of travel information, will be essential if the struggle against the car is to be won.

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UNITED KINGDOM

**Anne GRAHAM**  
**University of Westminster**  
**London**  
**United Kingdom**



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## **1. INTRODUCTION**

This paper discusses the relationship between transport and leisure travel. The definition of “leisure” is very broad, ranging from a short trip to a local sports centre to a two-week summer holiday. Each sub-segment of leisure demand will have different transport needs and desires. The emphasis here is on leisure activities which involve a substantial journey away from the home environment or, in other words, tourism trips.

It is often very difficult to distinguish between leisure and non-leisure (e.g. business, commuter) use of different forms of transport except when dedicated forms of transport, such as cruise shipping or charter flights, are being used. Nevertheless, the characteristics and needs of leisure travellers are so very different that they warrant special consideration. This is particularly important as the number of leisure trips continues to grow and accounts for an ever-increasing share of total trips.

The relationship between transport and tourism can be considered in various ways, for example, from economic, geographical or marketing viewpoints. Alternatively, a systems approach to the analysis of tourist transport can be made. This highlights the importance of the inputs to system (e.g. demand/supply), as well as controlling influences (such as government policy) and outputs (the tourist travel experience) and the effect on the environment (Page, 1994).

This paper adopts the tourist or leisure transport system approach. Chapter 2 looks at the importance of leisure demand to transport operators, it considers the nature of this demand and discusses the different types of transport services provided for tourism or leisure demand. Chapter 3 then goes on to discuss the implications of the linkages between the transport and tourism industries, particularly from a policy viewpoint. Shifting to the outputs of the system, Chapter 4 discusses how leisure travellers perceive the transport dimension of their leisure activity and Chapter 5 looks at the impact that the tourist transport system has on the environment and considers moves towards greater sustainability. Chapter 6 concludes by looking to the future and assesses the issues which need to be considered within this framework of a tourist transport system.

## **2. THE LEISURE MARKET AND THE TRANSPORT INDUSTRY**

### **2.1. The importance of leisure demand to transport operators**

The substantial growth of leisure and tourism demand in Europe and elsewhere has meant that the leisure transport market share of the total transport market has become increasingly more important in recent years. In the UK in 1976, for example, there were 15.3 million international leisure trips [holiday and visiting friends and relatives (VFR)] made to and from the UK. By 1986,



this had doubled to 29.5 million and by 1996 the number reached 48.6 million. In this latter year, international leisure trips made by UK residents represented 79 per cent of all air trips, 74 per cent of sea journeys and 64 per cent of all trips made through the Channel Tunnel. For overseas residents coming to the UK, a smaller percentage of leisure trips were made by air (57 per cent) but with the sea and Channel Tunnel modes about three-quarters of trips were for leisure purposes (Table 1).

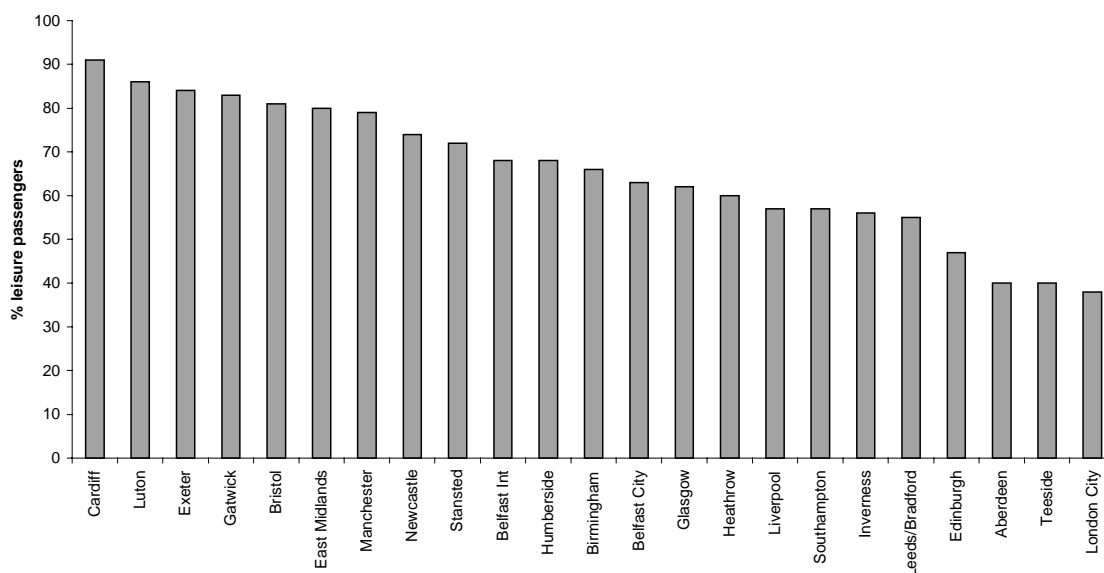
Table 1. **Travel to and from the UK by journey purpose (%) in 1996**

<b>UK residents outbound</b>	<b>Air</b>	<b>Sea</b>	<b>Tunnel</b>	<b>Overseas residents inbound</b>	<b>Air</b>	<b>Sea</b>	<b>Tunnel</b>
Holiday: Package tour	40	20	13	Holiday: Package tour	10	21	14
Holiday: Independent	26	41	42	Holiday: Independent	26	38	40
Visiting friends/relatives	13	13	9	Visiting friends/relatives	21	15	18
<i>LEISURE TOTAL</i>	<i>79</i>	<i>74</i>	<i>64</i>	<i>LEISURE TOTAL</i>	<i>57</i>	<i>74</i>	<i>72</i>
Business	19	10	19	Business	30	12	18
Other	2	16	17	Other	13	14	10
<b>TOTAL</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>TOTAL</b>	<b>100</b>	<b>100</b>	<b>100</b>

Source: International Passenger Survey.

Leisure passengers are also dominant at UK airports, representing at least half and often very much more of the total traffic at 19 of the major 23 airports (Figure 1).

Figure 1: **Share of Leisure Passengers at UK Airports 1996**



Source: CAA Airport Surveys

Looking at travel within the UK during 1994-96, distance travelled on holiday trips averaged 479 miles per person per year whilst for day trips it averaged 365 miles (compared with 337 and 307 miles respectively in 1985-86). Together, this accounted for 13 per cent of total national mileage for all purposes. On average, nine holiday and twenty day-trip journeys were made per person, increasing from seven and sixteen journeys respectively in 1985-86 but representing just 4 per cent of all journeys made (Table 2).

Adding in other forms of leisure activity (i.e. visiting friends, entertainment and sport), it may be seen that in 1994-96 overall leisure journeys represented about 29 per cent of all journeys made but 41 per cent of all mileage because of the longer distance nature of many leisure trips.

**Table 2. Travel within the UK by journey purpose (%) in 1994-96**

	<b>Journeys</b>	<b>Miles</b>
Holiday	1	7
Day trips	3	6
Visiting friends	18	21
Entertainment	4	5
Sport	3	2
<i>TOTAL LEISURE</i>	<i>29</i>	<i>41</i>
Commuting	19	20
Business	4	11
Education	8	4
Shopping	20	12
Personal business	9	6
Other	11	6
<b>TOTAL</b>	<b>100</b>	<b>100</b>

*Source:* National Travel Survey.

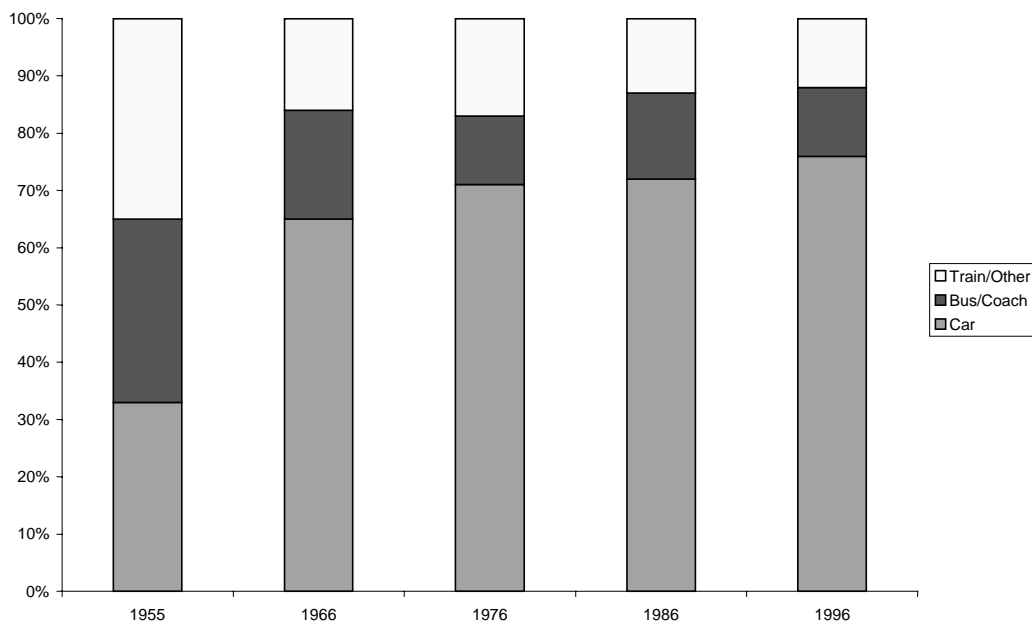
## **2.2. Use of different modes**

Looking specifically at the holiday market, it may be seen that air travel is the dominant mode of transport for international travel and indeed it has been taking an increasing share of the market (Figure 2). For domestic, long (4+ days) holiday travel within the UK, the car is the dominant mode of transport, rising from only 33 per cent in 1955 to 76 per cent in 1996, largely at the expense of rail and coach travel (Figure 3). For all domestic holiday and day trips in 1994-96, the National Travel Survey shows that about 80 per cent of journeys were made by car, with the bus/coach and bike each accounting for around another 5 per cent of journeys.

Whilst for the UK, the dominance of air for international journeys primarily reflects its geographical situation, overall in Europe the car is the dominant mode of transport for all holiday (both domestic and international) travel. Comparative statistics are difficult to obtain but research

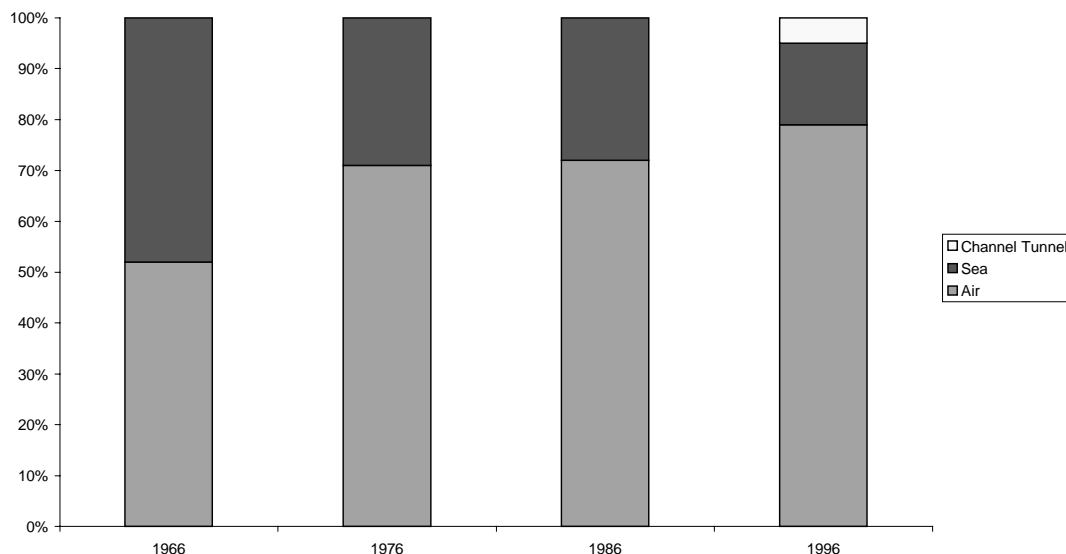
covering the twelve Members of the European Community in the eighties showed how overall the car's share was 68 per cent, followed by rail (14 per cent), air (13 per cent), coach (10 per cent), sea (5 per cent) and cycling (1 per cent). For some countries (namely, Belgium, Greece, France and Portugal), over three-quarters of all trips were made by car and only in the UK and Ireland was the car's share less than 60 per cent. Geographical and cultural characteristics explained why Greece had an abnormally higher share by sea (25 per cent) and the Netherlands a higher share by cycle (6 per cent) (European Commission, 1986).

Figure 2: UK Domestic Long (4+ days) Holidays: Mode of Transport Used



Source: British National Travel Survey

Figure 3: UK Foreign Holidays: Mode of Transport Used



Source: British National Travel Survey

Clearly, for leisure trips and longer holiday trips, the car offers convenience, flexibility and accessibility which public transport cannot match. The car is also usually perceived as the cheaper option since very often more than one person will be travelling together. For example, the 1992-94 National Travel Survey shows average car occupancy rates of 2.66 for holiday and day trips compared with 1.17 for commuting and 1.20 for business. Usually, only the marginal costs of petrol and wear and tear are taken into account since the car will primarily be used for day-to-day purposes (work, shopping etc.) and the capital cost and fixed costs (such as tax, insurance) will rarely be considered. Empirical evidence from the inter-urban leisure travel market in Great Britain, for example, has found that the cross-elasticities of demand for car with respect to rail characteristics (e.g. price, time, frequency) are very small (Wardman, Toner and Whelan, 1997).

### **2.3. Different roles of transport for tourists**

Transport has to be an essential element of tourism since, by definition, tourism involves travelling away from the home environment. Whilst this transiting role of transport is crucially important for the transport industry, there are two other key areas where the transport and tourism industries overlap:

#### **2.3.1. *Transport providing movement at the tourism destination***

Once the tourists have arrived at a destination, transport provides the means of travelling around the destination. Examples include transfers from airport/ports and accommodation, group sightseeing tours, car hire services or just private individual travel.

#### **2.3.2. *Transport serving as a tourist attraction***

Transport itself can also be the main reason for taking the trip. Canal and river trips, deluxe and steam rail travel and supersonic air travel are all examples of transport acting as a tourist attraction. There is also cruise shipping, which is experiencing substantial growth in certain European countries such as the UK because of the diversification of the main tour operators (e.g. Airtours, Thomson) into this business.

### **2.4. Patterns of demand**

As with most transport journeys, the nature of demand for leisure purposes tends to be very uneven and causes peak periods of traffic. Very often there will be seasonal patterns caused by religious or institutional holidays (e.g. Christmas, Easter and school holidays) and other factors, particularly climatic changes. Within this seasonal peak, there may then be further peaks, typically with many long holidays starting and finishing at the weekends. Short-break holidays push up demand on Friday and Sunday evenings.

In the UK in 1996, for example, the International Passenger Survey shows that 35 per cent of all international trips made by UK residents by air and 36 per cent of all sea/tunnel trips were made in the three months July-September. The monthly patterns at airports, too, reflect the business/leisure mix. For example, for the airports with a large share of leisure passengers (e.g. Gatwick and Manchester - see Figure 1 above) there is a much more uneven pattern of demand. At Heathrow, with less leisure traffic, the seasonal pattern is less pronounced, whereas at London City there does not

appear to be a seasonal pattern at all [rather a growth pattern, as the airport is still developing services (Figure 4)]. Domestically, the peaked pattern on demand for different leisure activities may clearly be seen (Figure 5). Obviously, this is because, on a daily basis, most leisure activities take place at the weekend.

Figure 4: Monthly Distribution of Passengers at UK Airports 1996

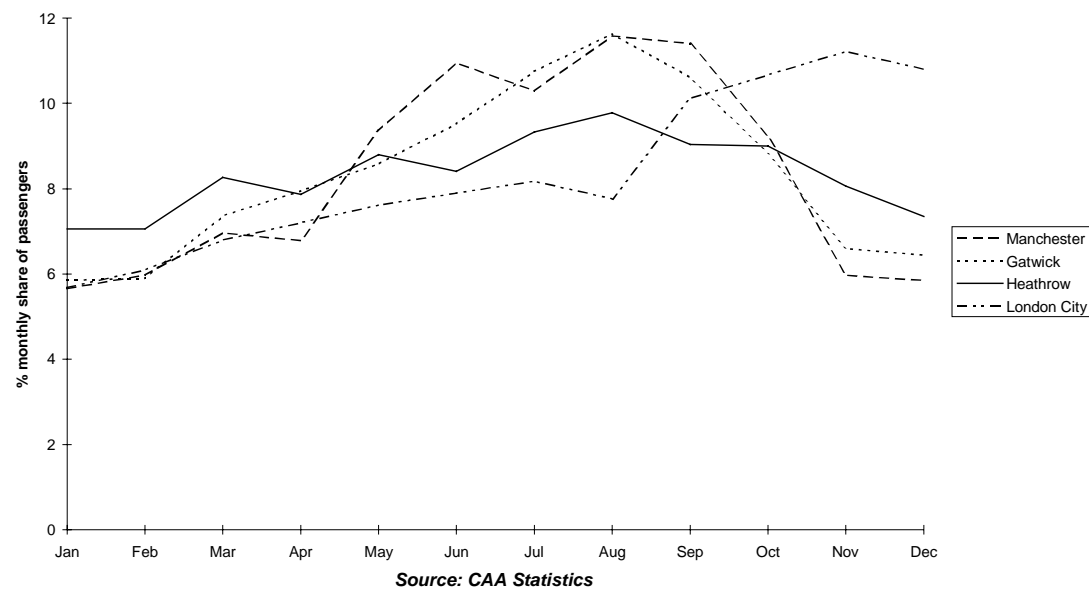
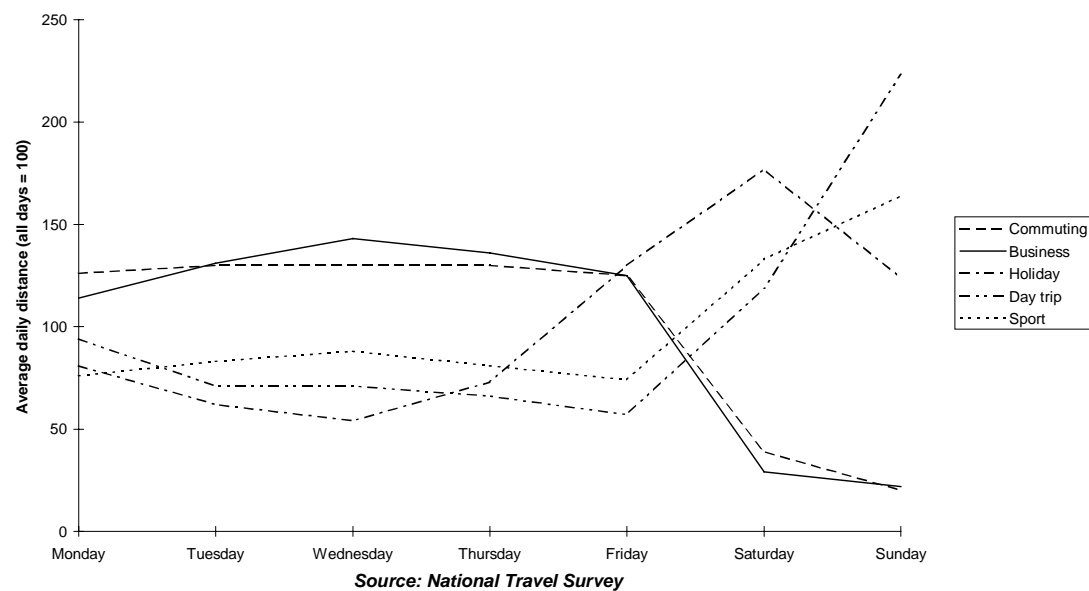


Figure 5: Average Daily Distance Travelled in the UK 1994/6



In some cases, such peaks will overlap with other types of demand for transport caused, for example, by work patterns. Many airports are full on Friday evenings, coping with increased demand, with business travellers coming home plus leisure travellers taking short breaks. Within destinations too, peaks may overlap with dire consequences. A number of British towns (e.g. Brighton, Bournemouth) have a huge influx of foreign students in the summer months, all of whom will travel to their language schools at the same time as the resident population make journeys to work.

At the other times, the tourism demand can complement other demand and actually help to fill up spare capacity and make better use of resources. A few European airlines, such as British Midland and Finnair, charter out their aircraft at quiet periods during the night and at weekends to tour operators, whilst other carriers such as British Airways shift a number of aircraft at weekends from predominantly business routes, where there is not much demand, onto more busy leisure routes.

During the day, many longer distance rail and air transport operators require a mixture of business and leisure travellers to ensure that there is effective utilisation of resources and both have to develop simultaneous marketing strategies aimed at both business and leisure demand (Hollings, 1997). Another similar example is the London public transport system, which earns a substantial amount of income for tourists, who mostly travel after the morning rush hour.

If the transport operator is exclusively or primarily serving the leisure market, the typical peaks and troughs associated with leisure demand will have major implications. Whilst yield management and other demand management techniques can attempt to even out demand patterns as much as possible, mismatch of demand and supply will usually still occur. An interesting example is Guide Friday, which operate around 100 double-deck buses for sightseeing tours in nineteen UK towns and cities, employing between 600-700 staff during the peak period. In the winter, however, only six destinations are served and a total of around 40-50 daily trips, compared with 500 trips in the summer, are made. Such a peaked operation is sustained by employing many seasonal staff and purchasing old, second-hand vehicles cheaply, which are reliable for the short mileage sightseeing trips and have little depreciation.

### **3. INTERRELATIONSHIPS AND CONFLICTS BETWEEN TRANSPORT AND TOURISM POLICIES AND DEVELOPMENTS**

#### **3.1. Interrelationships**

Throughout recent history, the growth of the transport and tourism industries has been very much interrelated. For example, domestic tourism was revolutionised by the development of the railway in the nineteenth century and the private car in the latter part of this century. Similarly, the introduction of aircraft jet technology directly led to the emergence of the charter and tour-operating industries and consequently in a dramatic growth in foreign holiday-taking. A number of resort areas, particularly in the Mediterranean but also further afield in countries such as the Seychelles, Mauritius, the Maldives and various Caribbean islands, could not have developed had it not been for the introduction of air services.

Clearly, for any tourism destination, the provision of good transport infrastructure and services is essential but the linkages between the tourism and transport industries will differ depending on the nature of the destination, the importance of tourism and so on. Robbins (1997) argues, giving the example of the small island of Bornholm in Denmark, that it is the peripheral destinations, namely, those which are most inaccessible or remote from major tourist-generating regions, where the independence between the tourist industry and transport acting as a transit service is at its greatest.

The linkages between the transport and tourism industries are extensive and need to be considered during all decisionmaking processes associated with policy formation, planning, infrastructure provision, regulation, marketing and so on. Lamb and Davidson (1996) give examples of the linkages between transport and tourism for the different modes:

**Bus/Motorcoach:**

- Capture of intercity touring market;
- Capture of a growing seniors market.

**Rail:**

- Consideration of high-speed rail;
- Consideration of impacts of increasing/eliminating rail services.

**Air:**

- Establishing runway capacity to ensure competitiveness;
- Negotiation of bilateral air services;
- Access to/from “gateways”.

**Highways:**

- Convenient and safe service centres and rest stops;
- Tourist signs and maps;
- Maintenance;
- Development of scenic touring routes;
- Adequate parking facilities.

**Marine:**

- Capture of cruise ship market;
- Linking of tourist destination by boat.

**Bicycle/Linear corridors:**

- Protection of abandoned rail corridors for touring/recreation;
- Linking to form “greenways” for tourism and recreation.

**Intermodal:**

- Increasing the ease of transfer;
- Co-ordinating schedules and fares.

**Transit:**

- Linking of air/rail terminals with inner cities;
- Increasing access to tourism attractions;
- Offer of special tourist passes.

### 3.2. Policy implications

The adequacy of the transport links will be of fundamental importance to the success of a region or country's tourism industry. At the same time, the transport industry can be a major beneficiary of tourism because of the additional passengers which are generated, sometimes during off-peak periods (see section 2.4.). However, in order for both industries to benefit from such linkages, policymakers must fully recognise such linkages and integrate them into the decisionmaking process. In practice, this may not be easy, particularly if there are different government agencies/ministries responsible for the two industries.

As Lamb and Davidson (1996, p. 265) say:

*"No longer is it realistic to view the two sectors as entirely discrete entities, with separate jurisdictional agencies/ministries pursuing their own goals along parallel paths. The importance of each sector to the other must be clearly recognised and addressed, and co-operative mechanisms, policies and activities must be initiated to promote and strengthen the linkages for the benefit of all stakeholders."*

In the UK, a recent example of improvements being made to increase the understanding between the two industries, is the forthcoming appointment of an advisor to the English Tourist Board responsible for transport and traffic management issues. This is one of a small number of advisors each covering an area which is seen as of major importance to the industry.

Conflicts can often arise if governments have different goals and pursue different objectives for the transport and tourism industries. A classic case is aviation policies, particularly in some developing countries, which are designed to protect the commercial and financial interests of national airlines. Such policies may hinder the growth of tourism travel and perhaps reduce the potential tourism benefits. On the other hand, allowing foreign charter airlines into the country may bring extra tourists but the tourists' average expenditure may be low and the sheer volume of tourists may have significant environment and social impacts. In these cases, an analytical framework, as suggested by Wheatcroft (1994), must be set up to enable the costs and benefits of alternative policies to be measured and compared. All too often, Raguraman (1997) argues that economic impact studies of tourism neglect to consider the transport element.

A similar example at a local level is when a bus or rail service is not financially viable but is essential to maintain local accessibility for the tourists. In this case, therefore, should the transport service be subsidised so that the community at large can benefit from the wider economic impacts which tourism can bring?

## 4. ATTITUDES TO TRAVELLING

### 4.1. Getting to the destination

At the centre of the debate about the relationship between the transport and leisure/tourism industries must be a discussion about how leisure travellers perceive transport services. Traditional transport economic theory argues that transport is a derived demand, rarely undertaken for its own



sake and thus that transport is a disutility which has to be undertaken to get from points A to B. With this view, time taken to travel is crucial whilst other journey attributes, such as enjoyment, are of less importance.

Robbins (1995) discusses whether such an approach is entirely appropriate when transport for leisure purposes is being considered. Clearly, the time savings brought about by the development of rail, car and air transport is one of the major reasons (along with reduced cost) why tourism growth has occurred. The key question, however, is whether smaller time savings are as important to leisure travellers as they are to business travellers and commuters. In some instances, for example, when a holiday of seven or fourteen days is being taken, a time saving of one to two hours is not likely to be viewed as being particularly important. Day trip or weekend/short-break travellers are clearly likely to be more time-sensitive though.

For leisure travel, therefore, time to travel may be of less importance, whilst enjoyment may be more. Through detailed research concerning attitudes to ferry and Channel Tunnel travel, Robbins suggests that the following factors influence to what degree a holiday journey is or is not an enjoyable experience:

- Personality and profile of the traveller;
- Size of party (with or without children);
- Mode of transport;
- Length of holiday;
- Familiarity with the mode of transport;
- Level of delay and congestion;
- Quality of service.

Robbins develops these ideas by constructing a leisure transport continuum with “hate it” journeys at one end and “very enjoyable” journeys at the other end, with the positioning of each journey depending on factors such as transport mode (e.g. car or cruise) and type of person (e.g. with or without children).

In many cases, therefore, travellers behave differently when engaged in leisure (particularly long-distance) travel. Time savings will be less important than with other types of travel and in many cases the journey will form part of the overall leisure experience. This has major implications for the transport industry. Travel time savings have traditionally played an important role in the appraisal of investment projects in the transport sector. Is this appropriate when dealing with projects which may be used by a large number of leisure travellers? Should the industry itself also concentrate much more on marketing the “leisure experience” of the journey and enhancing the service quality rather than trying to improve journey time (e.g. should cross-Channel ferries improve time saving by introducing catamarans or should they concentrate on improving the quality of their existing product)?

## **4.2. At the destination**

At a tourist destination, the leisure traveller will usually share transport services and infrastructure with other users such as residents. Grant, Human and Le Pelley (1997) have identified six key transport needs of the visitor at a tourism destination:

- **Reliability:** e.g. public transport running on time;
- **Value for money:** e.g. charges that are compatible with the level of service offered;
- **Speed:** not absolute speed but, e.g., minimal time lost through congestion;
- **Ease of use:** easy to understand arrangements giving confidence that systems work, e.g. clear signs/directions;
- **Accessibility:** addressing the needs of people with disabilities, e.g. dropped kerbs;
- **Security:** facilities that are safe, attractive and well maintained, e.g. CCTV at park-and-ride sites.

Clearly, many of these features are required by other users as well. However, when dealing with tourism demand, recognition must also be made of the different sub-markets (e.g. day-trip coaches compared with overnight visits) and their peaking characteristics.

It is just as important at a local level to appreciate the linkages between the two industries. Using the UK as an example, Grant, Human and Le Pelley (1997, p. A-29) write:

*“There are several levels of competence and policy procedures involved in planning for transport in the UK. The tourism industry needs to be aware of these and be clear about opportunities available for influencing them. Poor understanding of this leads to frustration with the system, which may not always meet the industry’s needs because they have not been made known to transport planners at the right time.”*

## 5. SUSTAINABLE TOURISM AND TRANSPORT POLICIES

### 5.1. Trends towards sustainability

With sustainability issues reaching the top of the political agenda in the 1990s, in recent years tourism operators and policymakers have been looking at ways of making the industry more sustainable. The highly visible impacts of transport and the need to maintain mobility and accessibility for the tourist, have meant that sustainable transport policies have been at the centre of the debate on sustainable tourism.

Gotch (1995, p. 1) writes:

*“In Europe the problem of sustainable transport overwhelms the element of tourism because traffic and mobility are problems which pervade the economies and the everyday lives of all the nations of the continent. Any consideration of sustainable tourism must first come to terms with the nature of the transport problem, in order to define, within it, the problems of tourism.”*

The issues related to the transport and tourism industries and sustainability are complex and far-reaching. The discussion below focuses on just three key areas, namely, air travel, visitor management and cycling. It raises some important matters which need to be addressed if the industries are to become more sustainable.

## 5.2. The aviation industry

As seen in Table 1 and Figure 1, air travel to and from the UK is dominated by leisure passengers. Indeed, on a global scale, Boeing (1993) estimate that around 85 per cent of all international passengers fly for leisure purposes (although the share for domestic travel is less). Developments within the aviation industry, therefore, have a very significant effect on international tourism.

The combined pressures to “green” the aviation industry and to improve economic performance, have meant that in recent years many airlines, in common with other transport operators, have devoted much more attention to environmental issues. For example, British Airways formally incorporated environmental responsibility into its corporate philosophy in April 1989 (Middleton, 1998). Other airlines, who have introduced new environmental practices into the aviation industry include Austrian airlines for waste management in the air, SAS and Lufthansa for fuel efficiency techniques and Qantas for the segregation of liquid wastes (British Airways, 1997).

Airports, too, are devoting more and more time to developing acceptable environmental strategies. Environmental opposition to airport expansion is making it increasingly difficult to provide additional airport capacity in Europe, which is badly needed as air transport demand continues to rise. In the few cases in Europe when new infrastructure has been permitted, a great deal of attention has been given to minimising the environmental effects of the development. For example, at Manchester, where permission has recently been granted for the building of a second runway, the airport company has entered into a legal agreement with the local planning authorities which covers over 100 different separate points concerning areas such as community relations, noise control, night flying, ultimate capacity, environmental works, road improvements, public transport and social policy (Twigg, 1998).

Clearly, aviation has very wide-ranging impacts on the environment, related to issues such as aircraft noise, fuel consumption, aircraft emissions, land use, capacity and congestion (International Air Transport Association, 1990). Aircraft noise has been and always will be an area of great concern. In Europe, agreement has been reached to phase out the noisiest aircraft (so-called Chapter II aircraft) by 2002 and some airports have already taken very stringent moves concerning these types of aircraft. For example, Amsterdam introduced a landing fee surcharge on Chapter II aircraft in November 1995, increased it by 50 per cent on April 1996, then again by 100 per cent both in November 1996 and April 1997 and then by 50 per cent in November 1997. Chapter II aircraft are also now prohibited at night and on new services. Partly as a result of this policy, the proportion of Chapter II aircraft decreased from 15 per cent in 1995 to 6 per cent by the end of 1996 and 4 per cent in 1997. In comparison with most other major European airports, Amsterdam now has the lowest percentage of these aircraft (Amsterdam Airport Schiphol, 1997 and 1998). Further restrictions are proposed for 1998 (Jones, 1998).

Aircraft emissions and their impact on the environment is an area which has attracted increased attention in recent years. Currently, it has been estimated that the contribution made by global aviation to the greenhouse effect is between 2 and 4 per cent and to the deterioration of the ozone layer less than 1 per cent (Amsterdam Airport Schiphol, 1997) -- although the precise effects of aircraft emissions on the environment are still not totally understood. As a result, there is increasing pressure to impose some kind of tax on the aviation industry, either on kerosene or actually on the fuels emitted, that will reflect the environmental damage caused by the industry.

Alamdari and Brewer (1994, p. 158) write:

*“Since the environmental impact of growing operations is increasingly becoming more important, and since technology only offers a partial solution to the problem, adoption of the ‘polluter must pay’ principle is likely to be applied at some point to the aviation industry.”*

In 1989, the Swedish Government imposed an emissions tax on Swedish domestic flights, initially at a rate of 12 Swedish Crowns per kilogram of nitrogen oxides and hydrocarbons and 0.25 Crowns per kilogram of carbon dioxide. Zurich airport, too, introduced an emission-related surcharge on its landing charge in September 1997. Instead of having an emissions charge, in 1995, Norway introduced an environment-based passenger fee, which is charged on a “per seat” rather than on a “per passenger” basis and hence is supposed to encourage airlines to fly with full aircraft (SAS, 1996).

Other countries, such as the Netherlands, are known to favour an emissions tax and, in the UK, the Royal Commission on Environmental Pollution recommended levying such a tax (RCEP, 1994). One of the major problems associated with such a tax is that it will distort competition unless applied to all countries alike. The European Commission is currently preparing a major strategy paper concerning the environmental impacts of aviation which, among other things, will be looking into the possibility of taxing kerosene (EC Inform, 1998).

Recent air traffic forecasts in the UK (Department of the Environment, Transport and the Regions, 1997), undertook a sensitivity test assuming that a fuel tax would be introduced in the year 2000 and this would have the effect of raising the projected price of fuel by 50 per cent. The forecast concluded (p. 20):

*“The impact of the fuel tax on passenger demand is not substantial, with fuel prices representing between approximately 8 per cent to 13 per cent of airline costs, a 50 per cent rise in fuel prices would be expected to lead to an increase in fares of between 4 per cent and 7 per cent. If the full extent of the rise in costs is passed onto passengers in higher air fares and the own-price elasticity of demand for air travel is assumed to be -0.8 for all markets, then the resulting decrease in demand will be between 3 per cent and 6 per cent, approximately one years’ growth.”*

In a climate of greater “green” awareness, concern about the environmental impacts of air transport continues to grow. In December 1997, for example, the environmental group, Friends of the Earth, launched a new campaign called “The Right Price for Air Travel”. The campaign calls for a reduction in so-called artificial subsidies (e.g. no VAT on air travel, duty-free shopping, government financial assistance to surface access links near airports, for national airlines and regional airports) and the introduction of “green” taxes, for example, on kerosene (De Clerck and Klingers, 1997).

### **5.3. Visitor management**

Whilst transport has been crucial in the development of tourism, in many cases it has also played a major role in contributing to the environmental pressures which many tourist areas, such as historic towns, national parks or mountain and coastal resorts, are now facing. With extreme cases, the

provision of transport, whilst attempting to satisfy the tourists' need for mobility and accessibility, will at the same time be destroying the very qualities which make a place attractive as a tourist destination.

Changing leisure travel patterns have meant that such travellers tend to be more mobile and hence they exert greater pressure than ever before on tourist destinations. This is partly due to the decline in traditional long-stay holidays at a single destination (e.g. a seaside resort) and increases in short breaks, day trips, special interest and activity holidays. Table 3, for example, shows how the ratio of tourists to residents can be very large in some cities (such as Salzburg, Canterbury and Venice). Many of the environmental problems facing these tourist destinations are primarily due to the huge proportion of visitors who come by car, as illustrated in Table 4 for a sample of historic cities.

**Table 3. Tourist/resident ratios in historic cities**

<b>City</b>	<b>Year</b>	<b>Tourists</b>	<b>Residents</b>	<b>Ratio</b>
Bruges	1990	2 740 000	117 000	23:1
Florence	1991	4 000 000	408 000	10:1
Oxford	1991	1 500 000	130 000	12:1
Salzburg	1992	5 415 000	150 000	36:1
Canterbury	1993	2 250 000	41 000	55:1
Venice	1992	8 627 000	80 000	108:1

*Source:* Grant, Human and Le Pelley (1996).

**Table 4. Mode of travel (%) by visitors to UK historic towns**

	<b>Car</b>	<b>Train</b>	<b>Bus/Coach</b>	<b>Other</b>	<b>Total</b>
York (1989)	67	20	13	0	100
Chester (1990)	62	13	23	2	100
Bath (1986)	59	17	21	3	100
Cambridge (1994)	55	17	23	5	100
Stratford-upon-Avon (1987)	53	10	34	3	100
Oxford (1991)	48	16	33	3	100

*Source:* Grant, Human and Le Pelley (1995a).

Some destinations have responded by introducing visitor management techniques, which is a relatively new discipline but is rapidly gaining popularity, particularly in the UK. Such techniques are often regarded as simply finding a solution to vehicular or pedestrian congestion, but in fact they should be seen as much more than this. They should integrate visitor activity within the long-term planning and day-to-day management of a destination (Davidson and Maitland, 1997). As the English Tourist Board states (1991, pp. 6-7):

*“...the term ‘visitor management’ is used .... to embrace a whole range of measures aimed at managing both tourism and the environment in which it takes place. Thus visitor management initiatives may be aimed at the visitors themselves, the place or the host community -- and sometimes all of these.”*

Traffic management schemes, such as the provision of park-and-ride facilities, enhanced public transport provision, pedestrian priority and traffic calming are, therefore, just one dimension of the wider visitor management process. The dominance of the motor car clearly means that it will be at the centre of any discussion about traffic management. A recent visitor survey undertaken at Oxford discovered that the most quoted dislikes (25 per cent) related to traffic impacts (Glasson, 1994). With a wider survey of 28 UK heritage towns and cities, respondents from 27 of the 28 destinations agreed with the statement that “car-borne tourists are essential to the economy of the town”. Twenty of the 28 respondents believed that access by car would have to be discouraged in the future by restricting parking spaces or increasing parking charges (25 respondents) and introducing or improving park-and-ride schemes (22 respondents). Only five respondents suggested road pricing (Morris, 1997).

However, it is not just impacts of the car which are of major concern -- coach operations, either operating sightseeing tours or bringing tourists to the destination, also have to be considered. As Higginson (1994, p. 37) notes, when investigating tourist coaches operating in major European cities:

*“In most cities it has been found that coaches are treated little differently from other road traffic, with ad hoc controls introduced to meet the requirements of individual locations rather than being subject to any overall policies. Only in a minority of cities is the impact of coaches fully understood, or statistics available to show the extent of coach traffic. As more cities begin to tackle problems of traffic congestion and environmental pollution, the need to quantify the current and potential role of coaches in transporting large numbers of visitors in an economical and environmentally friendly way will become more urgent.”*

Various destinations have tackled the management of coach operations in different ways. For example, Windsor has introduced coach parks and coach routes, Cambridge has established coach drop-off points, Salzburg has a coach park-and-ride service, whilst in Bruges and Canterbury coach-borne visitors are expected to become pedestrians and walk at least 20 minutes into the town centre (Grant, Human and Le Pelley, 1995b).

In response to increasing pressure to manage coach transport in a number of UK tourist destinations, in 1996 a code of practice was agreed between local authorities and coach and tourism sectors, promoting practical measures to help manage the movement and parking of coaches in historic towns and elsewhere in England (Markson, 1997).

A recent study of over 100 historic cities throughout Europe investigated the common traffic management schemes used, looking at both car and coach policies (Glasson, J., K. Godfrey and B. Goodey, 1995). The most popular schemes were the provision of tourist shuttle bus services, special coach drop-off/pick up points and designated coach parks. Nearly all the respondents also indicated that they operated some form of pedestrianisation scheme. Just under two-thirds operated park-and-ride schemes (although discussions found that this term was often misunderstood, see Table 5).

**Table 5. Traffic management measures used in historic cities in Europe**

	<b>Used (%)</b>	<b>Not Used (%)</b>
Pedestrianisation of town centre (or part of it)	88	12
Shuttle bus from coach park/train station	84	16
Coach drop-off point	75	25
Park-and-Ride	62	38
Residents pay lower public transport charges	2	98

*Source:* Glasson, Godfrey and Goodey (1995).

There are a number of well-documented case studies of visitor management schemes, for example, in the UK at Oxford (Glasson, 1994), Cambridge (Human, 1994), Canterbury and Stratford-upon-Avon (Page, 1995). Godfrey (1997) argues that more research into the relative successes of different visitor management schemes is needed. Indeed, with the English Tourist Board's (ETB) action plan for the future, namely "ACTION 2000", pilot programmes are to be set up to gather examples of visitor management techniques to use as benchmarks for best practice.

It is not just the historic towns and cities, however, which are having to cope with increasing pressures caused by increases in visitor numbers -- primarily arriving by car. Popular countryside areas, such as the national parks in the UK, are also facing major problems of pollution, congestion and environmental degradation caused by excessive car usage.

Table 6 shows the huge number of visitors coming to the eleven National Parks. It also shows the population, giving an indication of the small amount of traffic generated by residents. For all of the parks, the vast majority of visitors come by car.

**Table 6. Visitors at the UK National Parks**

<b>National Park</b>	<b>Area km<sup>2</sup></b>	<b>Population (1981)</b>	<b>Approximate visitor numbers per annum (millions)</b>
Northumberland	1 031	2 200	2m visitor days/year
Lake District	2 292	40 000	14m
North York Moors	1 432	27 000	13m
Yorkshire Dales	1 760	18 600	6m
Peak District	1 404	37 400	22m
Snowdonia	2 171	23 800	10m visitor days/year
Pembrokeshire coast	583	23 000	13m visitor days/year
Brecon Beacons	1 344	32 200	4m visitor days/year
Exmoor	686	10 000	2.5m visitor days/year
Dartmoor	945	29 100	10m
Norfolk/Suffolk Broads	288	5 500	1.5m

*Source:* Cullinane (1997).

Visitor management schemes have, therefore, been introduced in the national parks and other popular countryside areas as well. Such techniques include road closure schemes, traffic calming, parking controls, increased signposting and improving the provision of public transport, including park-and-ride schemes (Walsh, 1994; ETB, 1991).

It is debatable, however, as to whether these schemes have been successful and whether they have gone far enough. Cullinane (1997, p. 277) writes:

*“Most of the national parks have gone to some effort either to promote the use of public transport or to restrict car usage, but many of the measures introduced have been piecemeal and small. Only in a few of the parks does there appear to be a real commitment to the notion of traffic management. However, in several cases where visionary and broader, integrated schemes have been devised, they have either not reached implementation stage because of local opposition, or have had to be abandoned soon after implementation because of lack of use, lack of funds and local opposition. Only a handful of schemes have survived and could be deemed to be successful.”*

#### **5.4. Cycling**

Clearly, the dramatic growth of car use for leisure purposes, whether in historic towns or popular countryside areas, has been the principal reason for the introduction of the various traffic management techniques described above. Many of these have the dual aims of attempting to reduce the use of the motor car (the so-called “sticks”) and encouraging greater use of public transport (the so-called “carrots”). But what of the most “green” of all transport modes -- the bicycle?

As regards cycling as a recreational pursuit, Beioley (1995) describes a number of factors working in favour of increased use:

- The “green” image of the bicycle as a form of transport and the need to curb and control the use of private cars;
- Increased awareness of the benefits of regular exercise to general health and fitness;
- A new, fashionable image of biking and the availability of a huge selection of modern accessories.

In spite of this, cycle use for all purposes is still very low in the UK, just 2 per cent of all trips compared with, for example, 18 per cent in Denmark (Robbins, forthcoming). The Royal Commission for Environmental Pollution (RCEP, 1994) recommended setting a target of 10 per cent of all urban journeys being made by bike by 2005. In July 1996, the UK Department of Transport unveiled its National Cycling Strategy, with a key target the doubling of the number of cycle trips by 2002 and further doubling by 2012 (Wardman, Hatfield and Page).

Grieve (1997) estimates that, in 1995, 500 000 domestic tourists took cycling holidays, representing about 1 per cent of all UK holiday trips. A small number of overseas visitors (100 000) also took cycling holidays in the UK. In addition, an estimated 71 million cycling day trips were made, accounting for about 2 per cent of all day trips. Compared with the total, therefore, leisure cycling trips are fairly insignificant. However, according to the National Travel Survey, cycling for



leisure purposes does appear to be becoming more popular, with the share of total cycle mileage for all leisure purposes increasing from 27 per cent in 1975-76 to 31 per cent in 1985-86 and 37 per cent in 1992-94.

Improved facilities, such as cycle tracks and off-road routes, may help to push up usage. For example, Sustrans, a national charity, is developing a 6 500-mile national cycle network, to be completed by 2005, which will pass through most major towns and cities in the UK. The core 2 500 miles, the Millennium Routes, are planned to be completed by the year 2000 (Ove Arup and Partners, 1996). The new network is expected to generate 100 million new journeys, 40 per cent for leisure purposes, but it is too early to tell whether the scheme will be successful. A number of local authorities, such as Kent County Council and Norfolk District Council have developed well-signposted cycle tracks as the basis for cycling tourism strategies which they hope will attract new visitors into the region.

Cycling for recreation, of course, is not without its problems. For example, in Cambridge, bicycles have become so numerous that they have become a problem in themselves requiring traffic management solutions. In countryside areas as well, as in the New Forest in the UK, overuse of popular routes has caused significant environmental damage, due to the carrying capacity of the routes being exceeded. Bike use can actually add to problems of car pollution and congestion as well if cyclists use this form of transport (rather than public transport which in most cases is very "bike-unfriendly") to transit to and from their chosen cycle routes.

## **6. FUTURE PROSPECTS**

In many areas, travel for leisure and tourism purposes has been the fastest growing sector of travel in recent years. For many markets, this trend seems set to continue into the future but, in some cases, growth may slow down as market maturity is reached. This may be the situation in the UK outbound air leisure market, particularly for short-haul travel (Graham, 1996). The latest Department of the Environment, Transport and the Regions forecasts (DETR, 1997) assume a degree of market maturity with the UK resident leisure markets and this partly explains why higher growth rates for business travel than leisure travel are forecast (Table 7).

Table 7. **International air traffic forecasts for the UK**

	<b>1995: Base-year Passengers (mill.)</b>	<b>2015: Forecast Passengers (mill.)</b>	<b>Average annual growth (%) 1995-2015</b>
<b>UK Residents:</b>			
Long Haul Leisure	12.1	33.9	5.3
L Haul Business	2.6	12.5	8.2
Short Haul Leisure	35.9	73.3	3.6
S Haul Business	7.4	17.6	4.4
<b>Foreign Residents</b>			
Long Haul Leisure	11.1	24.1	4.0
L Haul Business	3.6	14.9	7.4
Short Haul Leisure	10.4	31.1	5.6
S Haul Business	7.6	18.8	4.6

*Source:* Department of the Environment, Transport and the Regions (1997).

Irrespective of whether certain markets may be approaching market maturity, overall growth in leisure transport is still set to continue. Such growth will have major implications for transport, as decisions will have to be made as to whether it should be provided for and how it should be managed.

Many structural and operational changes to the transport industry will also have major implications for leisure travel -- which are too numerous to cover in this paper. With air transport, for example, it is too early to assess the long-term impacts of EU air transport liberalisation, completed in 1997, whether the cost of air travel will fall and whether the low-cost carriers, such as East Jet and Debonair, will have a major role to play (French, 1996). There is growing concentration and globalisation within the airline industry and, with recent moves towards privatisation with the airport industry as well, it appears that this industry is heading in the same direction (Doganis, 1998). Other key uncertainties are the extent to which improved high-speed rail networks in Europe will impact on leisure travel in Europe and what will be the long-term impact of the Channel Tunnel.

Fiscal policies will play a major role as well. Intra-EU duty free is set to be abolished on 30 June 1999. The abolition of such sales has been a hotly debated issue for a number of years. Supporters for abolition claim that duty-free sales distort competition between transport modes and other retailers, mislead the consumer and take up valuable space at airports, for example, which could be used for operational areas (Davidson, 1998). In response, supporters of such sales (particularly airports, ferry companies, airlines) claim that they benefit not only passengers but the whole of the travel industry and their abolition will put at risk sales of ECU 4.1 billion and cause a substantial increase in the cost of travel and a loss of jobs in all sectors in the region of 112 000-147 000 (European Travel Research Foundation, 1997).

Tourist travel by air may also become a popular area for government taxation -- a practice already adopted by a number of countries in recent years (Abeyratne, 1993). Indeed, in the UK it has been estimated by the Civil Aviation Authority that the introduction, in 1994, of a £5 passenger tax on

domestic and EU passengers and a £10 passenger fee for other international passengers (which was doubled in 1997) resulted in 1.3 million passengers being deterred from travelling in 1995 and 1996 -- many of whom would have been travelling for leisure purposes (Tourism Society, 1997).

\* \* \*

This paper has attempted to show some of the complexities and relationships which exist between tourism/leisure and transport and the integral role that transport plays in the leisure experience. From a policy viewpoint, all too often the transport and tourism industries have been considered in isolation with not enough consideration being given to the close linkages which exist. Transport operators and decisionmakers alike must be aware of tourists' needs and how the tourists perceive the travel experience. Tourism organisations, likewise, must understand basic national and local transport planning procedures and processes and try to play an active role in influencing these.

The typical uneven pattern of demand for leisure travel can be used as an opportunity for transport operators to improve resource utilisation, particularly in slack periods. If this is not possible, the mismatch between demand and supply will have to be managed by using a range of demand and capacity management techniques.

Perhaps, most importantly, the two industries need to work together to respond to pressure for greater sustainability. Leisure car travel and ways to control usage, as with such travel for other purposes, will be at the top of the agenda. For longer-distance travel, air travel too is likely to come under increased scrutiny, with the industries having to search harder for acceptable responses.

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## **SUMMARY OF DISCUSSIONS**





## SUMMARY

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## INTRODUCTION

Historically, leisure time was made possible by the reduction in working hours that followed productivity gains in the productive sector, and by social progress. Although not all free time, i.e. time not spent working, can be considered leisure time, leisure is still an important part of the activities of Europeans. Furthermore, the trend is towards more time free from the constraints of working life and towards increased leisure activities.

Despite the fact that leisure is important to us, it is seldom analysed as part of the transport debate, which is what this Round Table set out to do.

Our leisure activities range from shopping, visiting family and friends, to travelling to distant destinations. All of these activities have implications for transport, even though systematic analyses of them are lacking.

In contrast, work-induced mobility has been abundantly documented and analysed. There is clearly a false dichotomy between journey-to-work travel, which is seen as predictable, and leisure-related travel, which is perceived as more spontaneous. The first item discussed at the Round Table (1. Leisure trips – a poorly understood and underestimated phenomenon) addressed the fact that little is known about leisure-related mobility. This topic was included so that the extent and characteristics of leisure-related travel could be better evaluated. The second topic discussed at the Round Table was the impact of growth in mobility fuelled by tourism and leisure activities.

By way of conclusion, the Round Table endeavoured to draw up recommendations that follow logically from the impact on mobility of the importance of leisure.

### 1. LEISURE TRIPS – A POORLY UNDERSTOOD AND UNDERESTIMATED PHENOMENON

It would be fair to say that **the importance of leisure trips and associated traffic has been underestimated** and has not attracted enough attention from policymakers. Europe, the largest market for international tourism in the world, accounts for 60 per cent of all tourist arrivals worldwide. Thus, leisure passengers account for almost half of all traffic at airports. The fact that tourism accounts for 10 per cent of employment in Europe gives some idea of the size and importance of the tourism sector.

It should also be noted that leisure trips are not restricted solely to international tourism, in that tourism also has a large urban component. In the United Kingdom, for example, over 40 per cent of the distances travelled are linked to leisure activities and comparable figures may be advanced for all other European countries.

The impact of leisure on transport is indeed greater than that of journey-to-work trips. There are three essential components of leisure that any study must take into account:

- Type of leisure activity (cultural and sporting activities, relaxation, social activities, travel to new locations, etc.);
- Place (home, near to home, within a region, within a country, etc.);
- Time (daily, weekly, annual).

The reason for which these three aspects need to be taken into account lies in the fact that the activities undertaken during leisure periods are highly varied: shopping, visits to family or friends, trips to sports centres, walks in suitable surroundings, visits to tourist attractions, time spent at weekend homes, etc. Leisure activities, therefore, take a multitude of forms and their ramifications in terms of transport are themselves extremely diverse.

Leisure activities cover many different areas, ranging from sporting to cultural activities, social events, games and travel to new and different locations for the purposes of recreation or pleasure. It is therefore easy to comprehend why so much transport, which may be activity-specific, is involved before and after such activities.

Clearly, **leisure trips span a variety of very different contexts**, ranging from shopping trips in town (shopping trips are also expected to increase as standards of living rise) to long-distance trips in search of sun and sand, for example. In addition, the economic distinction between domestic and intra-European leisure trips will become blurred following the introduction of the single European currency.

It is possible to divide the places where leisure activities are pursued into different segments: at home, near to home, within a specific region, within a country or abroad. This spatial breakdown is matched by a temporal one, depending upon whether nights are spent away from home and, if so, how many nights at a time.

Cultural and sporting activities, seeing new places, relaxation, socialising may all be leisure activities but they are all undertaken for different reasons and have different consequences for transport. Here again, little information is available on the variety of forms that these activities take. Proper classification and identification of non-work-related trips is needed. Conducting household surveys in order to reconstruct trips and the reasons for them would enable us to better analyse the extent and types of leisure travel.

One distinctive characteristic of leisure activities is that their very variety means that they are poorly understood. Surveys need to be made of lifestyles in order to determine the amount of time spent on shopping or the frequency of trips made to second homes. Comparing such data at the international level, however, will pose problems unless efforts are made to harmonize definitions. It is clear that there are many different forms of tourism and leisure and that it is no easy task to grasp them in their entirety.

Furthermore, the characteristics of the tourism sector vary from one country to another. In the case of international tourism, for example, modes of transport and the frequency of departures differ. From another standpoint, however, the very concept of international tourism is no longer appropriate, given the emergence of a borderless Europe in which the domestic/international distinction is fast becoming irrelevant. While leisure transport is important, it is also complex as travel behaviour patterns vary across Europe. For example, Scandinavians travel abroad more than people from Mediterranean countries. Departure rates vary by a factor of 1 to 10 in the countries of Europe. The share of car travel ranges between 10 and 56 per cent and that of air transport between 23 and 77 per cent. Such large variations between countries have never been encountered in other areas of transport. On the other hand, length of stay shows no such variations. The geographical location of the departure country (transit country, peripheral area, island) has an influence on the mode of transport used.

Another consideration is that business tourism is on the rise, with trade fairs, conferences and other events combining business and leisure.

It is inconsistent to treat transport as induced demand in the case of leisure trips. Often, as in the case of an excursion, the trip itself is one of the reasons for travelling. The conclusion to draw from this is that the qualitative attributes of a trip are also of importance. Comfort and any additional facilities and services provided can be decisive factors for leisure travel. It is not just speed that counts. In this respect, leisure transport differs from commuter travel in that transport operators have to meet special requirements, particularly as people may be travelling alone or in family groups.

Models that consider transport costs as playing an important strategic role are not as important or relevant for leisure transport. In this case, with competition increasing sharply on certain markets, costs are not related to distance. However, for shorter leisure trips price is still a determining factor.

One of the particularities of tourism is the enhanced role enjoyed by suppliers as a result of advertising and also by virtue of the fact that, in selling activities that tend to be distant from the place where purchasers live, suppliers also sell transport services.

Trends in leisure activities and in the transport services relating to such activities vary from one market to another. Although the volume of trips made at weekends to second homes still remains high, the growth in such traffic, after rising strongly in line with the increase in car ownership, is no longer as high as that in trips to remote and attractive locations. It is also worth noting the strong growth in short-break trips and the trend towards dividing holidays into several shorter periods taken at different times of the year. Overall, the number of leisure trips has remained the same while distance and modal split have changed. The “distance” budget of western Europeans is increasing.

The leisure market and its related transport services are difficult to analyse as definitions are vague and reliable statistics are lacking. There are also problems with concepts and theory. Moreover, a substantial role is played by suppliers and advertising.

Obviously, definitions already exist in the tourist sector, such as those drawn up by the World Tourism Organisation. It is planned to review some of these definitions, which date from 1993, in the near future in order to expand them and modify their scope. It is therefore important to gain a more precise idea of the weight of tourism in the economy and to harmonize border surveys; **current data regarding the transport component of tourism are not detailed enough.** A simple basic definition, i.e. “non work-related travel”, further broken down by type of trip, should give a clearer

idea of which statistics are missing. Studies on tourism focus too much on the accounts side, despite the fact that the segmentation is not detailed enough for the transport sector. Transport should be included in the same surveys as tourism and data should be cross-referenced in order to establish which type of tourist uses which type of transport.

There are gaps with regard to domestic tourism: weekend tourism is not taken into account and urban tourism is disregarded. In addition, even in the case of international transport, very little is known about the movements of tourists once they have reached their destination. Short trips by local residents are ignored since data are generally gathered on origin, not destination. Another shortcoming is that Europe is still treated as if it had borders. All of which means that we need to know more about lifestyles. If we are to advance the study of leisure transport, we have to start by improving our information on leisure behaviour patterns. There are also gaps in our information on transit traffic and itineraries. If we continue using data that are too sketchy, our benchmark will be some amorphous type of tourism that is unable to differentiate between individual tourists. Admittedly, sophisticated surveys are expensive, but they are totally justifiable on the grounds that leisure mobility is greater than journey-to-work mobility.

In the absence of systematic surveys, tourism and leisure activities and their impact on transport very often tend to be disregarded in studies on mobility. This is a forgotten market. Leisure time is difficult to define and quantify – data are scarce – and is not reflected in transport policy.

## **2. IMPACT OF GROWTH IN MOBILITY FUELLED BY TOURISM AND LEISURE ACTIVITIES**

Tourism and leisure activities are characterised by daily, weekly and monthly peak periods. Transport operators should take advantage of them. While airlines transfer a number of aircraft from business routes onto busier leisure routes at weekends, urban tourism and trips during summer peak periods pose other problems.

Mention should be made here of the fact that growth in tourism and leisure activities, which are both linked to rising standards of living, earlier retirement and the trend towards shorter working hours, have a major impact on the environment. The two modes of transport that are most used for leisure activities are, for short- and medium-distance trips, the car and, for long-haul trips, air transport (the fastest growing mode). In the United Kingdom, for example, the car is used for 70 per cent of holidays.

If we look at fluctuations in tourism, we can see that there was a dramatic increase in tourism from the countries of eastern Europe from 1989 onwards, followed by a decrease due to the economic difficulties that the countries in transition were experiencing. Now, the trend is keeping pace with income growth. As destinations, the countries of eastern Europe, where there are some quality problems, appear not to have matched tourists' expectations and, with a few exceptions, destinations in eastern Europe have lost their appeal.

As a result of fierce competition, air transport has become relatively cheap, particularly on long-haul routes where competition is the most effective. Some experts consider that the airlines subsidise long-haul flights by means of higher tariffs on short-haul links, where the competition between airlines is not as intense. Mass tourism is influenced by prices and discount fares made possible by the fact that transport is an under-priced service.

Over shorter distances, the use of the car, which offers flexibility, availability and the ability to transport a family with all its luggage, would, at first sight, seem to be irreplaceable. However, it is also fair to say that intermodal transport is routinely used in the tourism sector and for that reason warrants further consideration. For international journeys in Europe, air transport now has a market share comparable to that of the car, which is holding up well, moreover. As a general rule, the number of trips has remained steady. The distance travelled is increasing and the modal split is tending to favour the faster modes.

The conclusion to be drawn from the above is that tourism exerts significant pressure on the environment. As well as travel to a resort, it involves travel at the destination. Since the bulk of expenditure is often made before departure -- at the point of origin for air travel and during the journey for car travel -- some experts feel that tourism brings fewer economic benefits than we think. Moreover, the environmental nuisances it causes are real: for example, travel at the destination, which adds to congestion in tourist resorts. Others feel that the way forward is to promote local tourism, which requires little use of transport services other than those which are environmentally friendly. It would undoubtedly be possible to promote green tourism by offering people greater incentives to walk or make use of bicycles. Consideration might be given to establishing car-free areas where car-parking would be banned and tourists would therefore be forced to use other means of transport instead of the car. However, other measures will be needed to reduce the consumption of environmental resources by tourism.

The first impression of the experts at the Round Table was that **the price of mobility** failed to reflect the consumption of resources, notably in terms of the environment. The price of mobility is always a central issue with regard to the environment. It would be fair to say that, in this respect, the Round Table failed to break new ground when it asked for the impact on the environment to be integrated into transport prices. There is no doubt in anyone's mind, as regards mobility, that we are not paying enough for what we get when we use a means of transport. We should always bear in mind that changes in transport prices can have a substantial spatial impact, for example, by allowing people to rediscover their local area. The price elasticity of transport is much higher for leisure travel than for daily commuting. Furthermore, weekend road congestion problems could be alleviated if the price of mobility more closely reflected the nuisance it causes, even if steadily increasing mobility levels can, in part, be put down to ties to a particular place.

In contrast, the Round Table noted that **public transport**, provided that certain changes were made, could be used to support leisure mobility. Leisure trips are made spontaneously and may take a number of different forms. The fact that they are also more varied is a challenge for major transport infrastructure. The policies implemented to influence journey-to-work trips will have no influence on leisure trips because the patterns and purposes of the latter are so different. By adopting a radically different approach to public transport, which until now has had to focus exclusively on journey-to-work trips, public transport could be made more flexible, more accessible and better adapted to leisure travel. Rather than trying to counteract strong trends, we should be trying to seize the opportunities they offer. Indeed, the Round Table called for a real revolution in terms of new and innovative ways of thinking. Adapting public transport to the market for leisure travel is well within



the scope of transport planners, who must dare to think and design systems differently (minibuses, pool taxis, dial-a-ride schemes, night services, accompanied luggage, promotional offers for tourists, complementary electric cars, etc.). Once public transport has been able to adapt its services in this way, it will also be able to cater for any kind of mobility, including journey-to-work trips.

More information is needed on movements by non-residents at their destination. In any case, more surveys on leisure-related travel would greatly further our understanding of mobility. It is also worth pointing out that transport operators need this information in order to identify potential markets. Moreover, with increasing privatisation, transport firms are becoming more aware of the virtues of marketing and have a greater need for information. Conversely, the information that operators do have is often confidential and is therefore not likely to be widely available.

Significantly, the same complaints that we make about gaps in statistical data on tourism (no information on itineraries, stopovers, short trips, information lost due to the Single Market) can be made for freight transport. This shows that **patchy statistics are a widespread problem**, hampering any sophisticated analyses of transport phenomena in Europe. Therefore, it is important that surveys on daily travel include weekend trips as well. Lastly, new technologies such as the Internet can help to promote tourism, by providing information regarding the destinations available and the means of transport on offer. In view of this, new technologies and leisure activities would seem to be complementary, which makes it all the more necessary to encourage public transport operators to offer radically different services. Drivers will be certain to make as much, if not more, use of the potential of new technologies as public transport operators: for example, in-car guidance systems that will display what route to take to attractive tourist destinations to avoid any traffic jams. It is easy to see why public transport should not let itself fall behind in its use of the potential offered by new technologies, particularly as some experts think that there will be extremely high growth in leisure activities in the coming years.

In fact, the average annual distance travelled by Europeans doubled in the past twenty years as air travel became accessible to all. This has not in any way diminished local travel. One of the features of leisure travel is that its different markets can grow alongside each other. There is no competition between remote destinations and local tourism. What we need, in this case, is to solve local transport problems in destinations where tourist flows swell the numbers of local residents.

On the other hand, if we are mindful of the problems posed by climate change and greenhouse gas emissions, we will clearly have to promote shorter trips, i.e. **local leisure trips**. Urban environments must be seen to offer something for everyone, to be more versatile, if they are to cater for local people's need for a change of scene. The important thing, from this standpoint, is to enable them to rediscover their local area. However, this attitude could also be regarded as reflecting fear of globalisation and a resultant loss of identity. In addition, some experts feel that the need to get away from it all can be put down to the poor quality of our daily urban environment. The downside of the virtual reality on offer in other far-off places is the disutility of travel, i.e. getting from A to B with no stops en route. We tend to opt for one extreme or the other, ignoring anything in between and this is another consequence of tourism as we know it.

At issue in these discussions was how much of our behaviour was innate and how much a result of our cultural environment. Some commentators believe that behaviour which favours the car, for instance, is the result of lax structures or structures that encourage car use, while others take the view that it is our behaviour that shapes elements of our cultural environment. The Round Table was unable to resolve the issue. In order to change people's behaviour, structures would have to be

changed (for example, by providing a better living environment). However, we should avoid oversimplifying the problem, as the structures are complex and there are so many cultural influences that it will not be easy to reverse strong trends. Nevertheless, in car-free zones it had been found that people regained their mobility by going on foot or by using non-motorised means of transport. Educational programmes are indispensable if we wish to reverse trends. The education system does not teach people how to make the best use of their leisure time. They are easy prey for service providers, automobile manufacturers and for the image of tourism portrayed in advertisements. Clearly, if more green spaces rather than roads were provided in our towns, people would feel less need to get away at the weekend. Environmental specialists should therefore be involved in every study on leisure, if the process is to produce results. Partnerships should be established between public- and private-sector specialists and between tourism and transport authorities so that all of the aspects can be taken into consideration and tourist areas can be properly managed.

Similarly, specialists in the field of tourism should be called in on any combined transport/land-use planning initiatives. The advantage may be that they become more environmentally conscious. Indeed, any transport specialist would stress the importance of planning car-free or light traffic areas. Those who encourage the use of transport services should pay more towards the cost of transport. However, in order to change behaviour and to be consistent, action should be taken everywhere and particularly at the point of origin, despite the fact that this will vary for tourists, even if their destinations tend not to. Having an overall policy is the only way to influence behaviour. Policy objectives must not be different at different decisionmaking levels, there should be better co-ordination between those levels (national, regional, local).

## CONCLUSIONS

Leisure takes a variety of forms and uses a variety of modes of transport. However, all of those modes use scarce resources without really paying the true price. This is essentially a phenomenon of a society in which behaviour patterns are both dictated by and influence structures. We can try to promote more environmentally-friendly modes of leisure transport, but that will require combined action on several fronts at once (taxation, land-use planning, time management, incentives and disincentives, changes in past practice in public transport design).

All of these challenges may be seen as an opportunity: in responding to the challenge posed by leisure transport we are responding to the challenge posed by any kind of transport. This applies particularly to public transport.

The lack of information on lifestyles and on the analysis of all our movements is regrettable, as it means that many assumptions cannot be backed up by statistics. This is a shortcoming that has repeatedly been pointed out. Yet a better insight into tourism, for example, requires a scientific analysis that we would wish to be able to carry out.

Failing this, it is essential to involve tourism specialists in the framing of policy and in discussions, whether local or national in scope.

This analysis of leisure and associated transport modes highlights the influence of structures that favour polluting modes, a trend that can only be reversed by greater social awareness. The first signs of this are already apparent, but we have not yet managed to put all of the elements in place. A great deal of money is being invested to encourage the purchase and use of cars or to promote trips to far-off destinations. Although society perceives these forms of consumption as enhancing its standard of living, they do give rise to environmental pressures. It would therefore be advisable to assign environmental performance indicators to each of them. It is by initiatives of this kind – which have an impact at individual level – that these deep-seated trends can be slowed.

## LIST OF PARTICIPANTS

M. le Professeur Philippe H. BOVY  
Institut des Transports et de Planification  
École Polytechnique Fédérale de Lausanne  
GCB (Ecublens)  
CH-1015 LAUSANNE

**Chairman**

Mrs. Anne GRAHAM  
Senior Lecturer  
Transport Studies Group  
University of Westminster  
35 Marylebone Road  
GB-LONDON NW1 5LS

**Rapporteur**

Professor Dr. G.W. HEINZE  
Technische Universität Berlin  
Hardenbergstrasse 4-5  
D-10623 BERLIN

**Rapporteur**

Professor Dr. H. KNOFLACHER  
Institut für Verkehrsplanung und Verkehrstechnik  
Technische Universität Wien  
Gusshausstrasse 30/231  
A-1040 WIEN

**Rapporteur**

Mr. Henk MEURS  
MuConsult  
P.O. Box 2054  
NL-3800 CB AMERSFOORT

**Rapporteur**

Madame Françoise POTIER  
Directeur de Recherche  
INRETS-DEST  
2 avenue Malleret-Joinville  
F-94114 ARCUEIL CEDEX

**Rapporteur**

Mw. drs. J.E. AARNINK  
Adviesdienst Verkeer en Vervoer  
Postbus 1031  
NL-3000 BA ROTTERDAM

Monsieur Gilles ARNAUD  
Commissariat Général du Plan  
5 rue Casimir-Périer  
F-75700 PARIS

M. le Professeur Michel BASSAND  
Chaire de Sociologie  
École Polytechnique Fédérale de Lausanne  
Institut de Recherche sur l'Environnement Construit (IREC)  
Case postale 555  
CH-1001 LAUSANNE

Mr. John CASTREE  
Business Planning Director  
Union Railways Limited  
106 Tottenham Court Road  
GB-LONDON W1P 9HF

M. le Professeur Georges CAZES  
Professeur Université Paris I  
19 rue de Montmorency  
F-75003 PARIS

Mrs Nancy COCKERELL  
Managing Editor  
Travel and Tourism Intelligence  
48 Bedford Square  
GB-LONDON WC1B 3DP

Mr. Rob DAVIDSON  
Senior Lecturer in Tourism  
Department of Tourism  
University of Westminster  
35 Marylebone Road  
GB-LONDON NW1 5LS

Monsieur Alain DUPEYRAS  
Direction de la Science, de la Technologie  
et de l'Industrie  
Section Politique du tourisme  
OCDE  
PARIS

Dr. Sheila FLANAGAN  
School of Tourism  
Dublin Institute of Technology  
Cathal Brugha Street  
IRL-DUBLIN 1

Dr. Lotta FRÄNDBERG  
Göteborg University  
Department of Interdisciplinary Studies  
of the Human Condition  
Human Ecology Section  
Box 700  
S-405 30 GÖTEBORG

Mr. Santiago GUERREIRO BRÉMON  
Économiste  
Instituto de Estudios Turísticos  
Ministerio de Economía y Hacienda  
Secretaría de Estado de Comercio, Turismo y Pymes  
c/ José Lázaro Galdiano 6  
E-28036 MADRID

Mr. Jan Vidar HAUKELAND  
Chief Research Officer  
Institute of Transport Economics (TØI)  
PO Box 6110 ETTERSTAD  
N-0602 OSLO

Dr. Odile HEDDEBAUT  
Chargée de Recherche  
INRETS-TRACES  
20 rue Elisée Reclus  
F-59650 VILLENEUVE D'ASCQ

Professor Lars HULTCRANTZ  
CTS  
Dalarna University  
S-781 88 BORLANGE

Professor Konstantinos KOUTSOPOULOS  
National Technical University of Athens (NTUA)  
Department of Geography and Regional Planning  
9 Iroon Polytechniou Str.  
Zographou Campus  
GR-ATHENS 15780

M. Paul LAEREMANS  
Administrateur délégué  
FBAA  
"Dobbelenberg"  
Avenue de la Métrologie 8  
B-1130 BRUXELLES

Monsieur Jean-Loup MADRE  
Directeur de recherche  
INRETS/DEST  
2 avenue du Général Malleret-Joinville  
F-94114 ARCUEIL CEDEX

Mme le Professeur Mara MANENTE  
Directeur  
CISSET  
Villa Moncenigo  
Riviera San Pietro 83  
I-30030 ORIAGO DI MIRA (VE)

Professor Dr. R. MAGGI  
Univeristà della Svizzera Italiana  
Via Ospedale 13  
CH-6900 LUGANO

Dr. Lluís MORENO i BARCELÓ  
Direcció General de Ports i Transports  
Generalitat de Catalunya  
Av. Josep Tarradellas 2  
E-08029 BARCELONA

Mr. Etienne PAUCHANT  
Représentant Général du Groupe IPK International  
Administrateur délégué  
4bis rue Anna Jacquen  
F-92100 BOULOGNE BILLANCOURT

Dipl. Ing. Robert THALER  
Department for Transport, Mobility, Regional Planning  
and Noise Protection  
Federal Ministry for the Environment, Youth and Family  
Stubenbastei 5  
A-1010 WIEN

Professor Dr. Hab. Marian TRACZ  
Cracow University of Technology  
Faculty of Civil Engineering  
Department of Highway and Traffic Engineering  
Warszawska Str. 24  
PL-31-155 CRACOW

Ing. Marianne J.W.A. VANDERSCHUREN  
TNO INRO  
Schoemakerstraat 97  
P.O. Box 6041  
NL-2600 JA DELFT

Professor Roger W. VICKERMAN  
Department of Economics  
Keynes College  
University of Kent  
GB-CANTERBURY  
Kent CT2 7NP



## **ECMT SECRETARIAT**

Mr. Gerhard AURBACH, Secretary-General

### ***ECONOMIC RESEARCH, STATISTICS AND DOCUMENTATION DIVISION***

Mr. Alain RATHERY, Head of Division

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