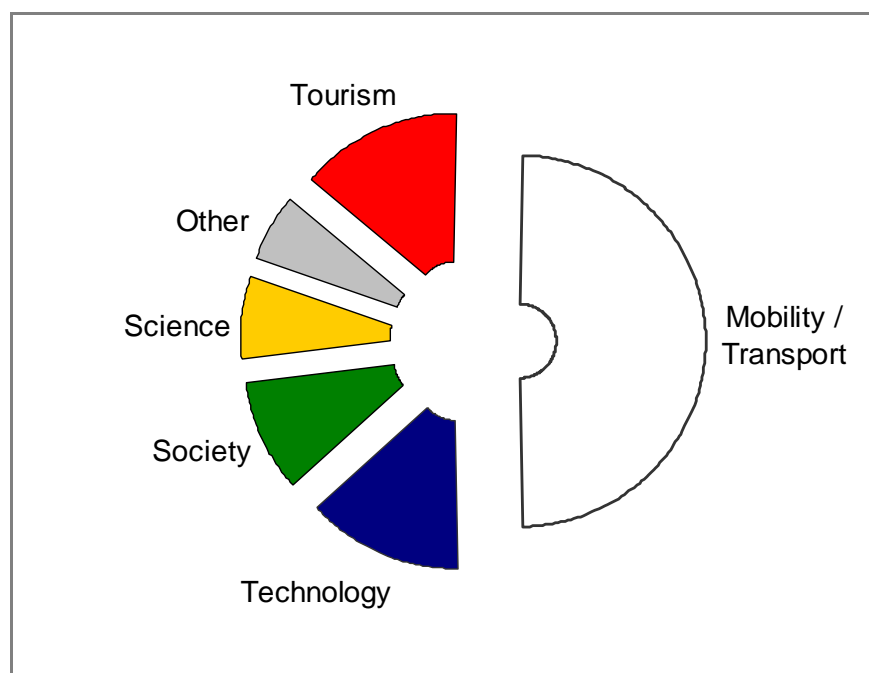


# The Future of Mobility and its Impact on Tourism

An Investigation into Relevant Long-Term Trends

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



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## **Executive Summary**

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

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

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

The study results were first published in April 2009 during the *World Tourism Forum Lucerne*. The survey was conducted with the support of the international science and research community in the form of calls for participation (→ page 17).

Lucerne, April 2009

# 1 Introduction

“Meaningfully discussing the future of transport [...] requires not only significant expert knowledge, but a lot of courage and some imagination.”

European Commission, 2009, p. 3

Numerous studies, essays, forecasts, scenarios and Delphi surveys have been published on the developments in the mobility sector in recent years. They generally examine sweeping trends in mobility, and frequently also in the business travel segment, which is of particular interest when seen from a managerial perspective. However, findings on holiday travel (excursions, domestic and international) involving multiple modes of transport continue to be the exception rather than the rule, especially when it comes to estimating trends in the leisure travel segment.

For the most part, such studies adopt a multinational, at times even a continental, perspective (e.g. European studies generally address the EU as a whole and as well as its affiliated countries) and mostly focus on a specific mode of transport, whereby air travel invariably takes the lead. Isolated studies on specific examples of this sector are generally sponsored by private companies (especially airlines) and are rarely accessible to the public because their findings are considered part of the company's intellectual property.

Mobility trend studies are rarely designed as representative surveys of populations or clients; instead, they mostly rely on the opinions of experts – usually from a few developed countries.

While publicly available studies may contain indications on likely trends in mobility, their findings are generally very sketchy (when pertaining to leisure and holiday travel), and they often reflect a strong bias toward moneyed interests when brought into connection with tourism issues. As a result, they are unlikely to serve as a meaningful basis for identifying the underlying principles, structured along international lines, that might determine the future of mobility and tourism.

It therefore became necessary to conduct a new and independent empirical survey on a comprehensive international scale that addresses explicitly the relevant determining factors shaping developments in leisure and holiday travel.

## 1.1 Objectives

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

In particular, the study asked the following:

- What determining factors are relevant for the international development of mobility, in particular, in connection with leisure and holiday travel?

What determining factors and motivators are likely to become the main drivers of travel demand, and what changes are likely to take place by the year 2030?



- Will new mobility and communication technologies have a significant impact on the forms of leisure and holiday travel?
- What consequences will arise for mobility in general and for the development of the various holiday travel segments in particular?
- Seen from an expert's perspective, is it possible to identify any alternatives to the anticipated trends, and how realistic are these?
- What opportunities and risks arise from anticipated developments for mobility and other tourism service providers?

The time frame extends to the year 2030.

## 1.2 Methodology

### 1.2.1 Overview

The study is based on the results of a preliminary analysis of international forecasts, scenarios (megatrends), and Delphi studies examining developments in mobility. It includes important research questions on mobility in terms of their relevance to tourism, and it structures and prioritizes them before integrating them in an interdisciplinary survey addressed to experts in topic-relevant fields. Expert opinions are then gathered online.

The expert opinions become the means for identifying relevant trends in the development of leisure and holiday travel (internationally), and they provide the basis for further discussions.

The survey is intended for experts and conducted at the international level. It is not representative of opinions among mobility clients or the general population.

#### 1.2.1.1 Delineation

This document identifies six factors that influence mobility demand as the most basic drivers of future mobility in leisure and tourism:

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

The broad range of topics found at the interface between the mobility and tourism sectors had to be structured and consolidated. Efforts to maintain a consistent interdisciplinary focus proved particularly challenging in this part of the project. It also became apparent how important it is to choose wording that is generally understood internationally. Discussions on mobility, in particular, seem fraught with diffuse terminology that becomes difficult to use when conducting an international survey, and in some cases, seemed to be devoid of meaning.

For example, during the discussion it became apparent that the term "sustainability" is unsuitable for use in this study. The lack of scientific precision coupled with inchoate associations to values and emotions, rules out a meaningful consensus at the international level as to what is actually meant. Furthermore, it must be noted that the term "sustainability" has also become vague in general discussions and that its genuine meaning is increasingly being replaced by connotations that serve a marketing purpose. The study thus refrained from using the term "sustainable" and instead used terms such as future-orientation, ability to function in the future, visionary as well as economic thinking (stakeholder orientation).

In general, the study sought to clarify the terminology and make distinctions (e.g. between mobility requirements, travel behavior, travel demand, and travel volume). "Drawing as much as a clear distinction between parameters and impacts of the transportation system has become impossible because some factors will play either an exogenous or an endogenous role, depending on how the system is defined and which consequences are being considered" (Widmer; Peters, 2000, p. 8).

Gauging the consequences of technological developments proved to be particularly relevant. For example, the question of how the acceptance of new information and communication technologies will impact mobility and tourism is relevant in an economic context and can be answered satisfactorily only by adopting an interdisciplinary approach.

In view of this, developments in technology were treated from the perspective of a generalist rather than that of a specialist: Specific aspects on the technological details were left out. Accordingly, this study ignored the issue of whether or not electric power, hybrid solutions, or hydrogen or gas engines will prevail in private passenger transportation because such questions are treated more thoroughly in surveys with a stronger focus on technology.

### **1.2.2 Structure of the study**

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

- supply and demand
- individual travel interests and travel motives
- transportation systems
- environmental and ecological aspects,
- information and communication technologies, and
- societal trends.

The findings of the study are laid out in accordance with these headings.

#### **1.2.2.1 Survey period and questionnaire**

The questionnaire is intended for experts in the field of tourism and mobility worldwide.

The survey was conducted as a Web-based questionnaire. The questions were validated and pre-tested. Pre-testers were experts from Germany, Japan, Switzerland and the US (in alphabetical order).

The link for the survey in English is: <http://www.unipark.de/uc/ITW/6c71/> (active link; deactivated evaluation function). Screenshots of the questionnaire are included in the appendix.

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

#### 1.2.2.2 Time frame of the study

In choosing the time frame, the study relied on a procedure used by Widmer and Peters (2000), who proposed the following reasons for choosing a distant horizon for their Delphi study on the future of transport in Switzerland:

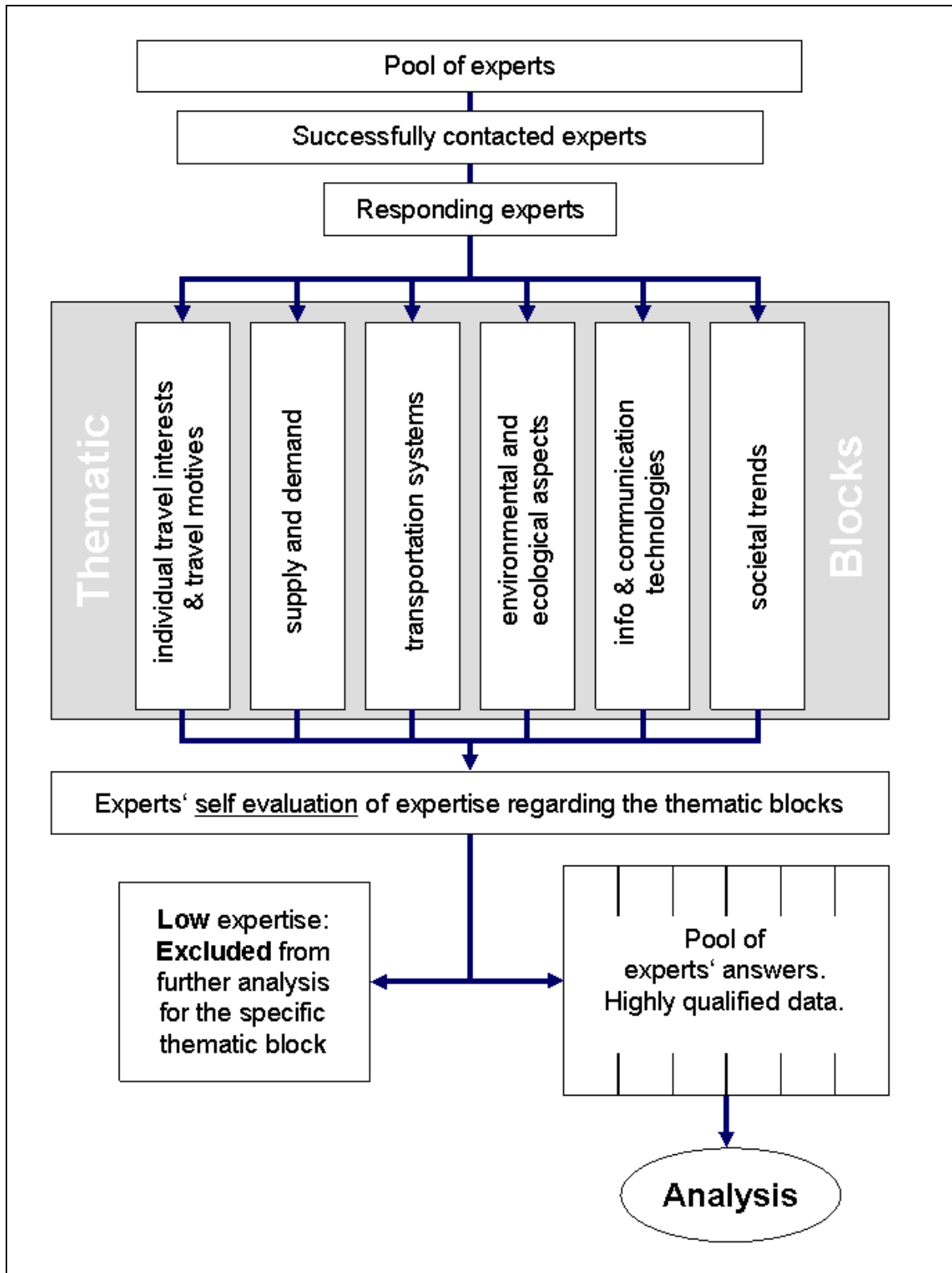
"On the one hand, the horizon for making the forecast must lie far enough into the future so that standard procedures (e.g. models) are unlikely to produce useful results. On the other hand, the period must be short enough so that experts are still able form sound opinions rather than being forced to rely on mere speculations."

(Widmer; Peters, 2000, p. 7)

In that this procedure seems reasonable and serves the purpose at hand, it was used and adapted to the requirements of this study.

An additional reason for the relatively distant time period meant motivating experts to adopt a long-term view of the future and to remove themselves as much as possible from the topics dominating the present situation (e.g. the global financial crisis). Studies aimed at the future should mostly avoid relying on a current situation as the basis for making projections because in doing so they fail to identify new perspectives in the long run. Therefore, instead of asking questions such as "by when do you expect...?", the study defined a time horizon as follows: "As of 2030 and beyond".

### 1.2.2.3 Choice of experts and other restraining aspects



Experts and their addresses were identified through

- literature research, including leading international magazines (focus: transport and tourism)
- analysis of relevant universities' Internet sites, faculty sites
- lists of congress speakers and congress participants
- specific key word search on the Internet, leading Internet sites

Experts on all continents were contacted.

The respondents themselves ranked their expertise on each of the six thematic blocks of the survey. Subsequent analyses then relied on these rankings as a further criterion.

Unlike as in the case in some Delphi surveys conducted on paper, an online survey refrains from ranking individual expertise on each survey item because Internet users are unlikely to accept such a complex and time-consuming procedure. The duration of the interview must be kept within acceptable bounds in order to avoid interruptions while the survey is in progress.

The criteria in the self-evaluation section were arranged in ascending order starting with "I know relatively little". Respondents were asked to answer the following question at the end of each of the six thematic blocs: "How would you rate your knowledge of this topic?"

The following choices were available:

- "I know relatively little"
- "I have general knowledge"
- "I know a lot about many of these aspects"
- "I'm a specialist or a professional who works in this field"

Replies by those who marked "I know relatively little" for a particular thematic block, or who opted for "no reply", were removed from the analysis of that thematic block and the results were excluded from further analyses (opinions on other thematic blocks were not affected and were included without restriction).

Using a rigorous selection in the form of a second criterion was meant to ensure that only well-founded opinions would flow into the analysis.

All in all, 3,949 experts were contacted by e-mail.

#### 1.2.2.4 Spatial aspects of expert opinions

As a tangible symbol of globalization, the airplane has made international travel accessible to a wide range of populations. At the same time, the reasons for travel, as observed among countries and cultures, continue to be far from uniform. Traveling for experience and adventure has a different qualitative and quantitative meaning in Europe than it does, say, in Asia. Furthermore, the demands placed by travelers when it comes to comfort and service differs significantly even within Asian countries. Expert respondents are therefore prompted to submit their opinions in relation to the population of their own country under the assumption that they are likely to have the highest level of expertise in this field.

## 1.3 Basic statistics

The online survey began February 2, 2009 and ended on March 2, 2009.

### Sample and response rate

The sample of the survey is structured as follows:

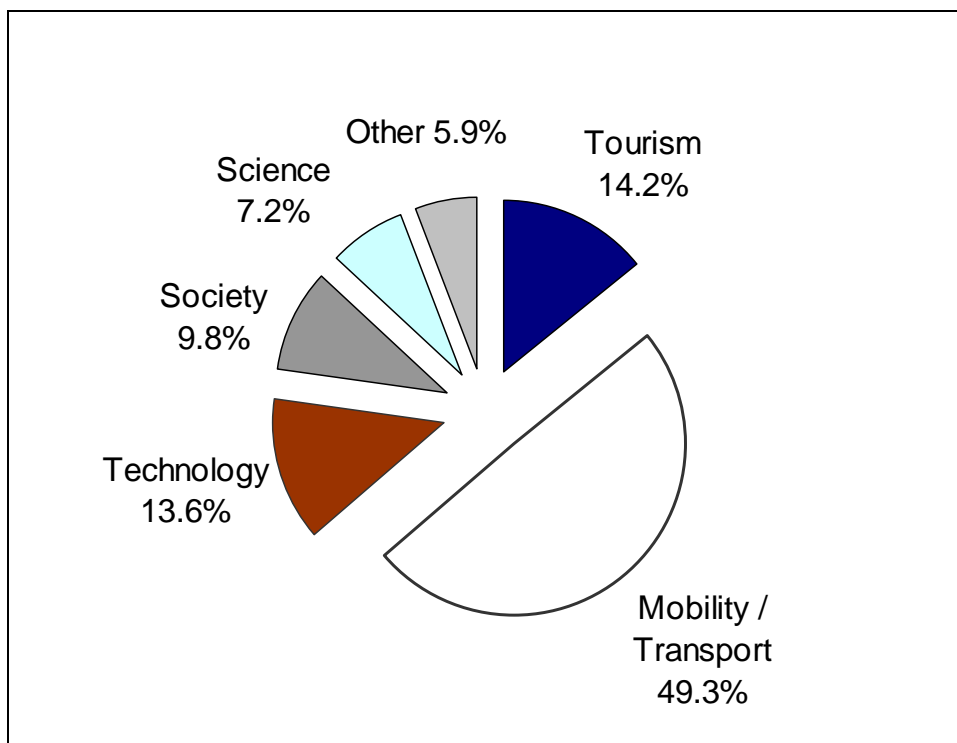
- 3,949 experts were contacted by email.
- 1,137 experts participated in the survey (= about 29 percent of all contacted experts).
- In addition, 471 experts chose to participate anonymously, making use of an “anonymous weblink” provided through an email-newsletter.

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

### 1.3.1 Fact sheets

The structure of the sample is as follows:

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



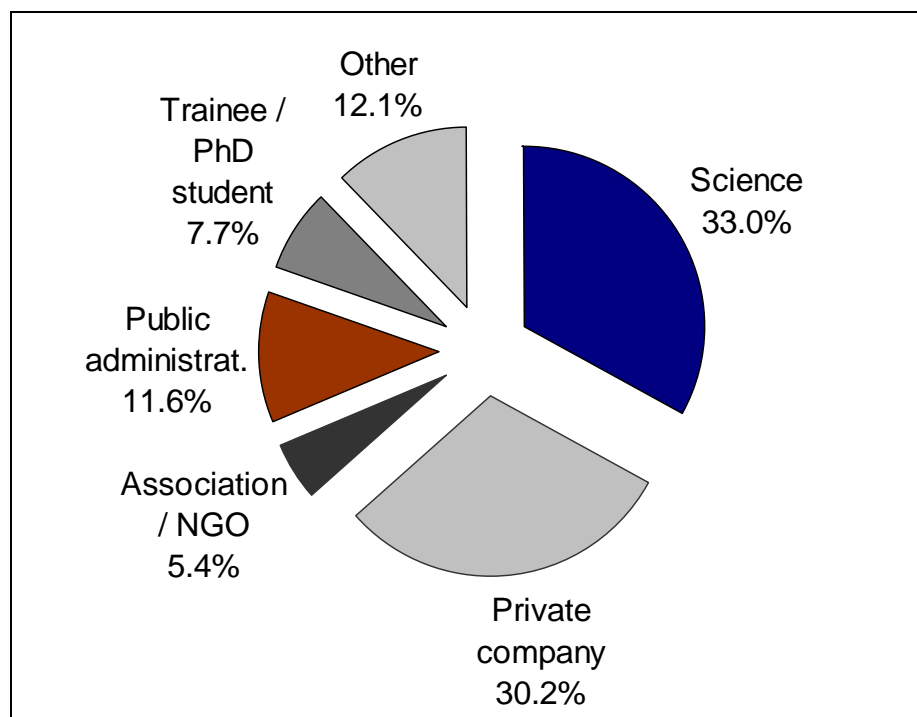
	Frequency	Percent
Tourism	228	14.2 %
Mobility / Transport	792	49.3 %
Technology	219	13.6 %
Society	158	9.8 %
Science	116	7.2 %
Other fields	95	5.9 %
<b>Total</b>	<b>1608</b>	<b>100.0 %</b>

Due to the fact that the majority of participants are from the work field mobility / transport, the analysis should differentiate and highlight eventual differences in opinions between experts with different expertise/work fields. Therefore, the “fact sheets” (each question has one) display the quota of answers depending on the field of expertise of the respective participants.

#### 1.3.1.2 Participants: Fields of occupation in the sample

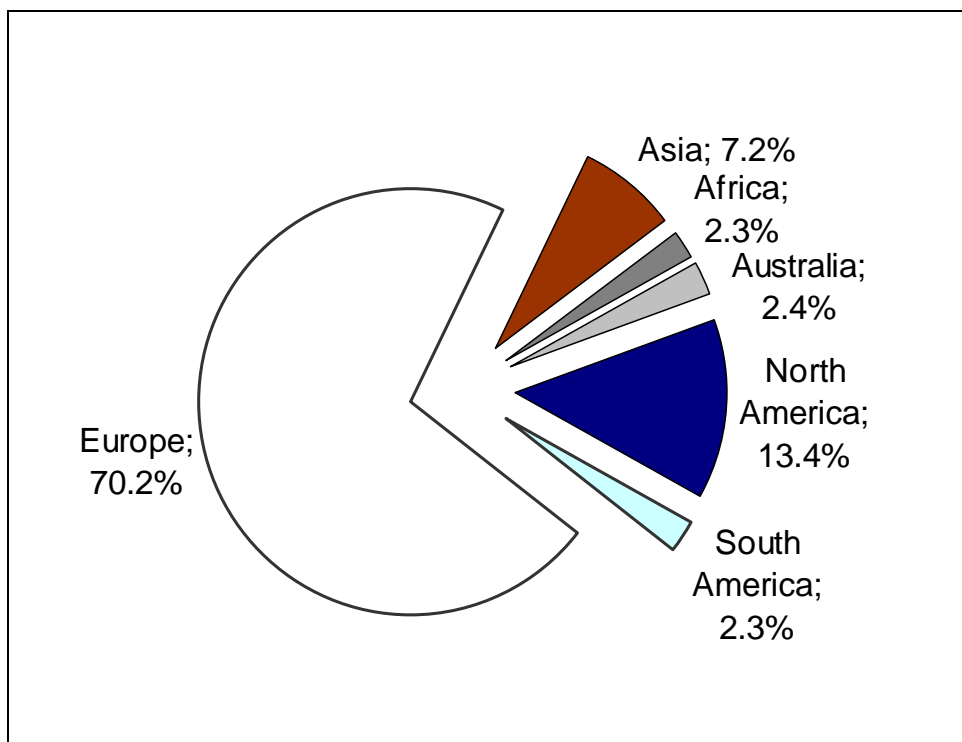
33% of all participants are employed in the field of science.

30% of all participants are employed by private companies.



	Frequency	Percent
Science	531	33.0 %
Private company	485	30.2 %
Association / club / NGO	87	5.4 %
Public administration	187	11.6 %
In training / (PhD) student	124	7.7 %
Other	194	12.1 %
<b>Total</b>	<b>1608</b>	<b>100.0 %</b>

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





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

Due to the fact that the majority of participants are from Europe, the analysis should differentiate and highlight eventual differences in opinions between experts from different continents. Therefore, the “fact sheets” (each question has one) display the quota of answers according to the origin (continent) of the respective participants.

## 1.4 Survey supporters and sponsors

The study was conducted and funded entirely by the Institute of Tourism at Lucerne University of Applied Sciences and Arts. It received no material or financial support from third parties.

Moreover, third parties did not influence the content in any way. It was designed and conducted exclusively by members of the Mobility Competence Center at the Institute of Tourism.

The survey was conducted with the support of the science and research community in the form of calls for participation. The following sponsors deserve a special mention in connection with conducting the survey:

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

## **2 The survey and its results**

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

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

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

### **2.1 Individual travel interests and travel motives**

#### **2.1.1 Key findings**

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

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

*Details → page 22.*

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

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

*Details → page 43.*

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

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

*Details → page 47; 48.*

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

When it comes to choosing a means of transportation, the issue of environmental friendliness is considered to be of increasing importance by a vast majority of experts

(73%). North American and European experts express this view more often than other countries. African experts rate environmental aspects relatively low (for their respective countries).

*Details → page 46.*

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

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

*Details → page 49 .*

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

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

*Details → pages 26; 25.*

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

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

*Details → pages 35, 36, 33.*

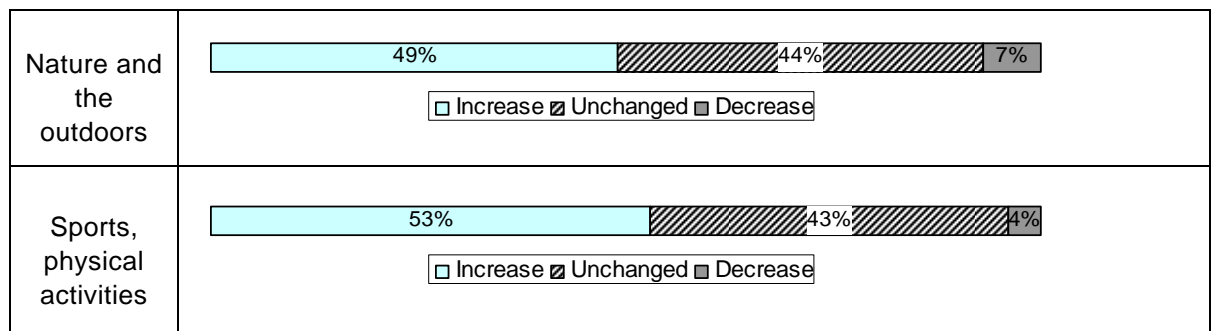
- **Intercultural experiences, broadening one’s horizon and knowledge gains will be increasingly important travel motivators.**

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

*Details → pages 34; 28; 29.*

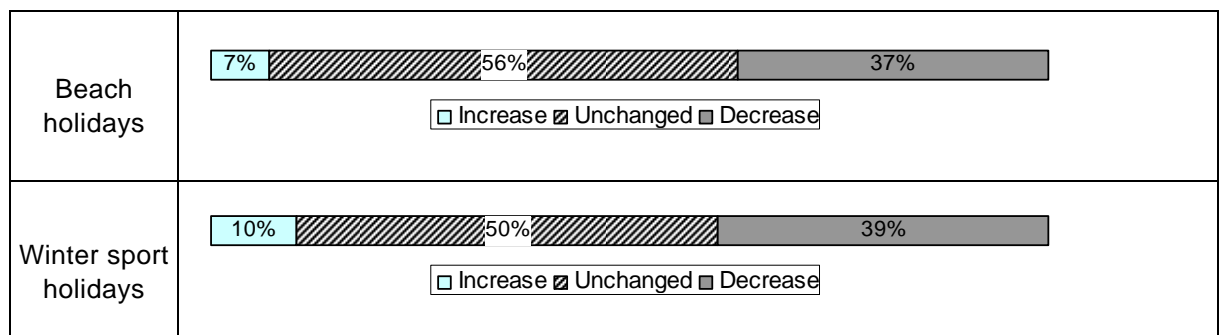
## 2.1.2 Comparisons

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



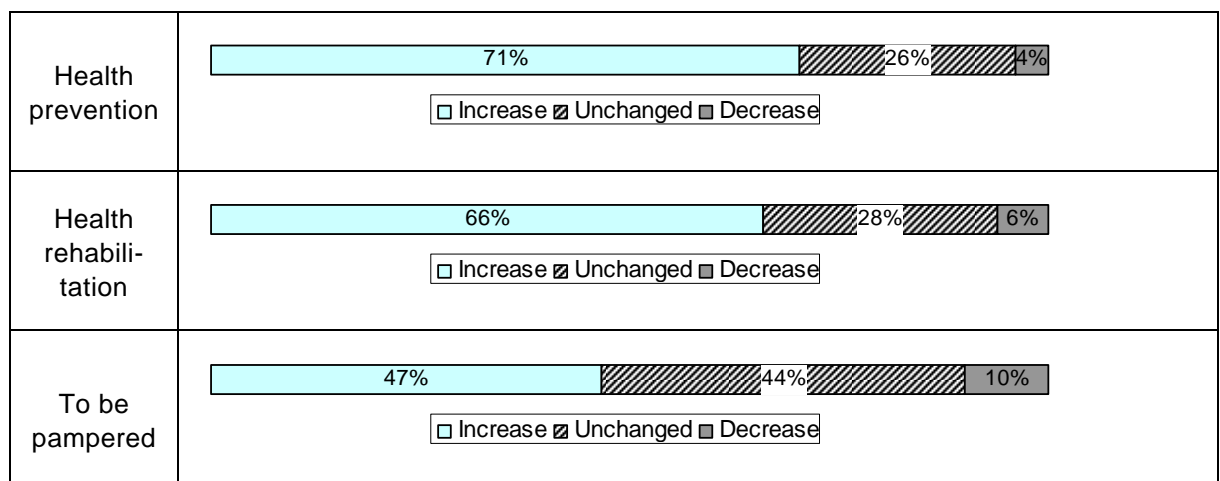
Sports and physical activities, experiencing nature and outdoors will become increasingly important as travel motivators. *Details* → pages 27, 39.

### 2.1.2.2 Classic beach holidays & winter sport holidays



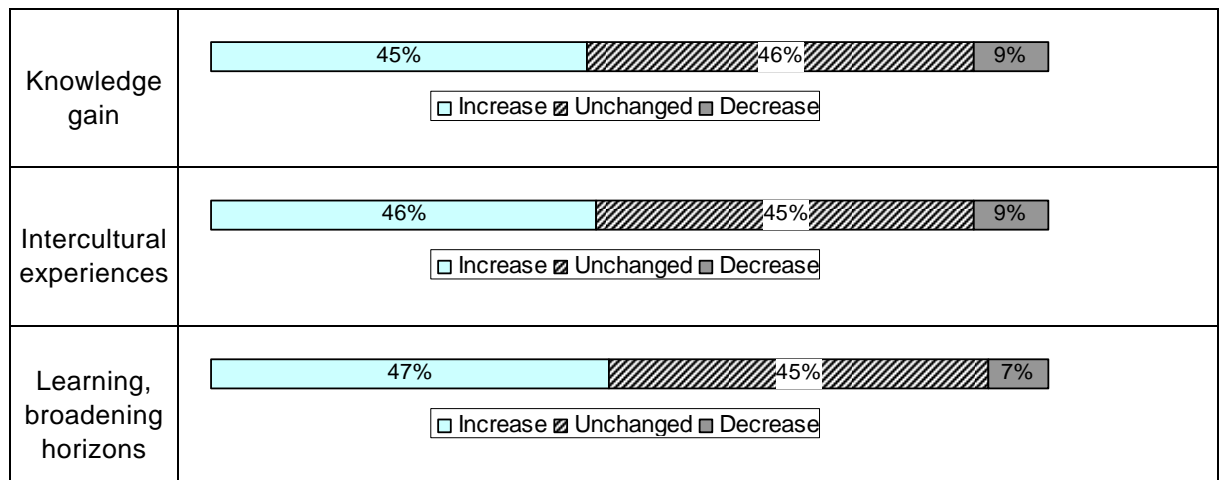
Classic beach holidays and winter sport holidays are expected to stagnate and eventually decline in relevance. *Details* → pages 37, 38.

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



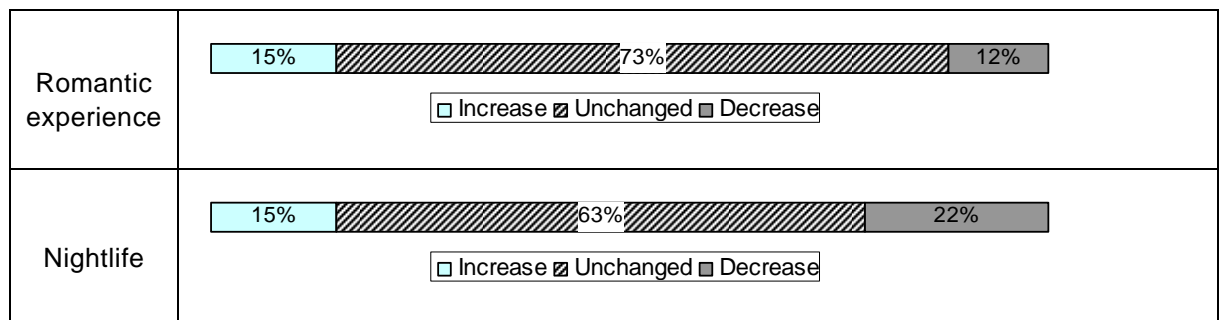
“Health tourism for rehabilitation purposes” and “Preventive health tourism” will be of increasing relevance by 2030. *Details* → pages 35, 36, 33.

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



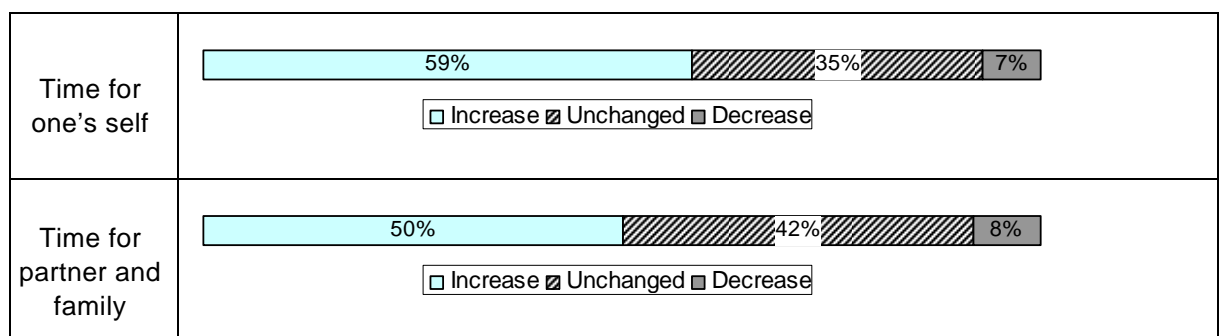
Intercultural experiences, broadening one's horizon and knowledge gains will become more relevant. *Details* → pages 34; 28; 29.

#### 2.1.2.5 Nightlife & opportunities for romantic experiences



Nightlife and romantic experiences remain relevant. *Details* → pages 30, 31.

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



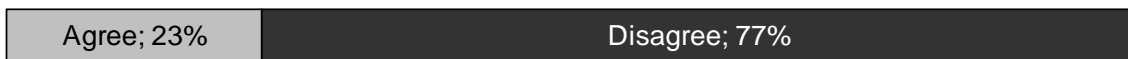
Time for one's self and time for one's partner and family will get even more relevant. *Details* → pages 26; 25.

## 2.1.3 Fact sheets

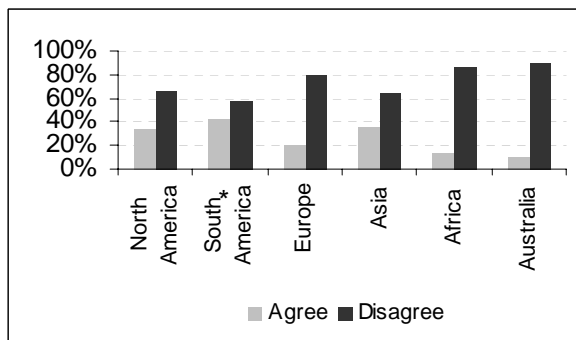
### 2.1.3.1 Virtual worlds

**Question:** By 2030, people in your country will regard virtual worlds as highly attractive, to the point that they will travel significantly less.

(1)



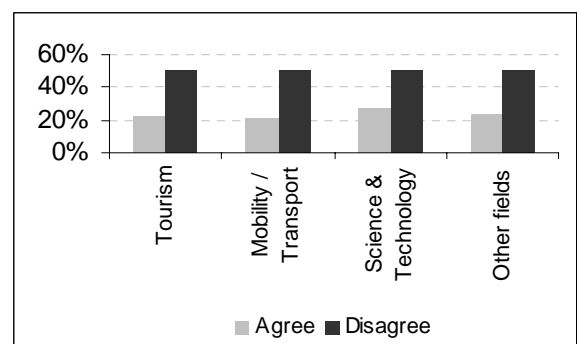
(2) Continent of residence



n = 531

\* less than 10 cases

(3) Interviewees' most important work field



n = 538

(1) The majority disagrees that 2030 virtual worlds will lead to less corporeal travel.

(2) There are slight differences concerning this issue with regard to continents. There is a tendency that African and Australian experts disagree most.

(3) There is a tendency that interviewees employed in the field of science & technology agree most.

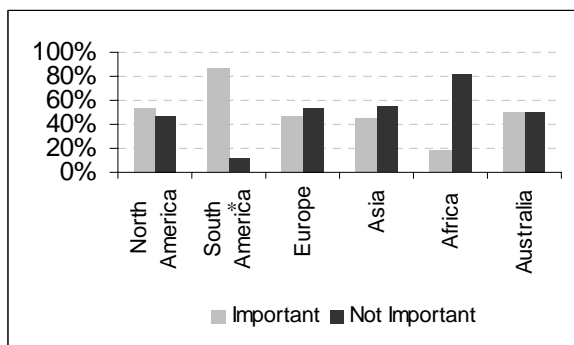
### 2.1.3.2 Fair travel – Relevance for business trips

**Question:** By 2030, how important do you think fair travel (concern for ecological and ethical aspects) will have become for people in your country when it comes to planning and selecting trips? - In the case of business trips

(1)



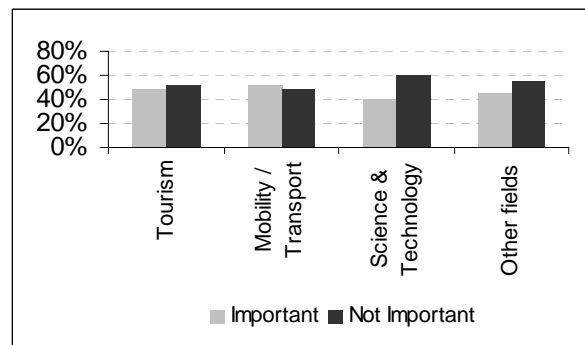
(2) Continent of residence



n = 530

\* less than 10 cases

(3) Interviewees' most important work field



n = 537

- (1) When it comes to planning and selecting trips the importance of fair travel in case of business trips is considered as rather balanced out by experts.
- (2) African experts consider the importance of fair travel in case of business trips to a high share as not important (80 %).
- (3) Employees in the field of science & technology do rate the importance of fair travel in case of business trips to the highest degree of all experts as not important (60 %).



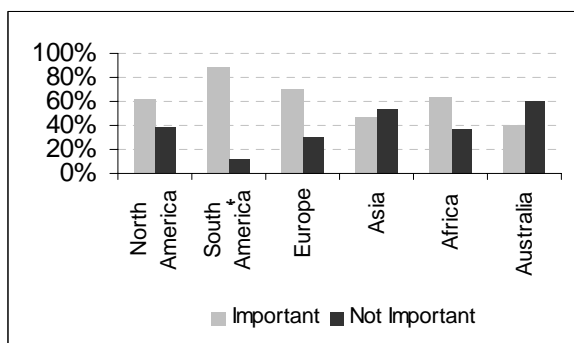
### 2.1.3.3 Fair travel – Relevance for personal, private trips

**Question:** By 2030, how important do you think fair travel (concern for ecological and ethical aspects) will have become for people in your country when it comes to planning and selecting trips? - In the case of personal, private trips

(1)



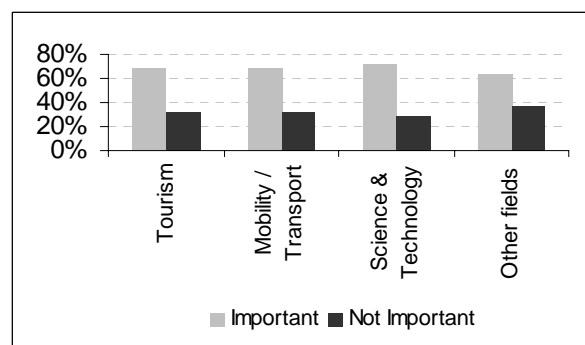
(2) Continent of residence



n = 530

\* less than 10 cases

(3) Interviewees' most important work field



n = 537

(1) When it comes to planning and selecting trips the importance of fair travel in case of personal trips is considered as important by 67 % of the experts.

(2) European, African, and North American experts consider the importance of fair travel in case of personal trips to a higher share as important in comparison to Australian and Asian experts.

(3) There is only little variation on this issue with regard to different work fields.

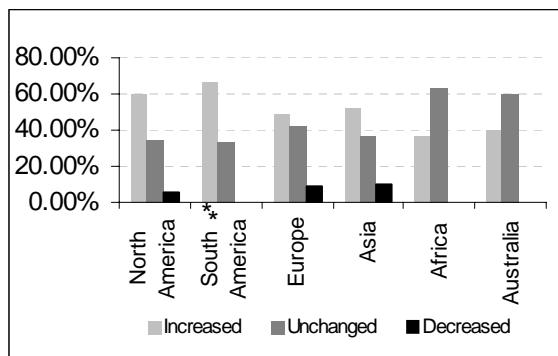
### 2.1.3.4 Travel motivators – Time for the partner and family

**Question:** How do you think the importance of the following travel motivators will have changed in your country by 2030? – Time for the partner and family

(1)



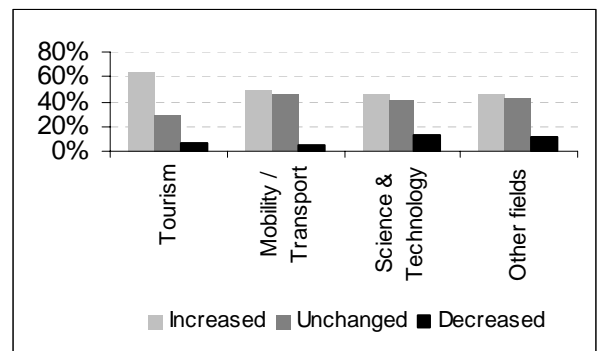
(2) Continent of residence



n = 530

\* less than 10 cases

(3) Interviewees' most important work field



n = 537

- (1) "Time for the partner and family" is seen as an increasingly relevant travel motivator by most of the experts, whereas 40 % think this travel motivator will be of unchanged relevance.
- (2) "Time for the partner and family" is considered as an increasingly relevant travel motivator especially by North American experts (60 %) for the year 2030.
- (3) "Time for the partner and family" is considered mostly as an increasing travel motivator by experts who are employed within a tourism work field for the year 2030 (61 %).

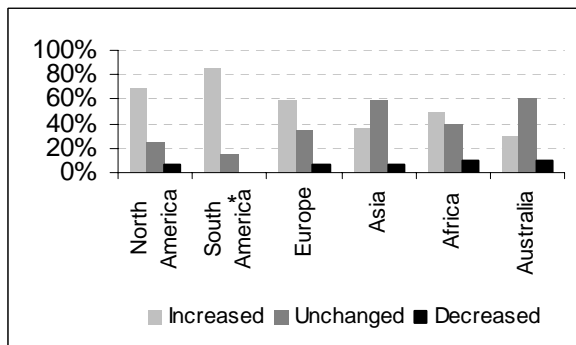
### 2.1.3.5 Travel motivators – Time for one's self

**Question:** How do you think the importance of the following travel motivators will have changed in your country by 2030? – Time for one's self, having control over one's own time.

(1)



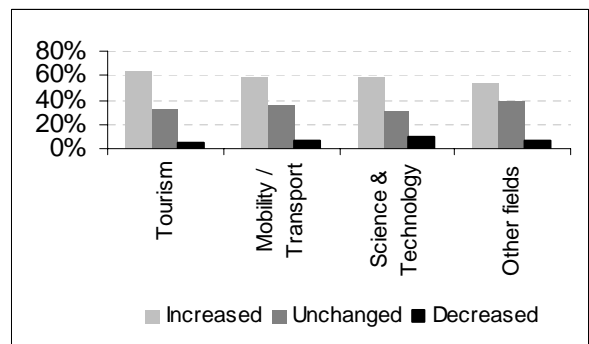
(2) Continent of residence



n = 529

\* less than 10 cases

(3) Interviewees' most important work field



n = 536

(1) “Time for one's self, having control over one's own time” is seen as an increasingly relevant travel motivator by 59% of the experts, whereas 35 % consider this travel motivator remaining unchanged.

(2) Experts of North America and Europe believe that this motivator is highly increasing. Asian experts consider “Time for one's self, having control over one's own time” to the highest share as unchanged by 2030.

(3) Employees in the tourism sector believe that “Time for one's self, having control over one's own time” is an increasing travel sector most with regard to other employees.

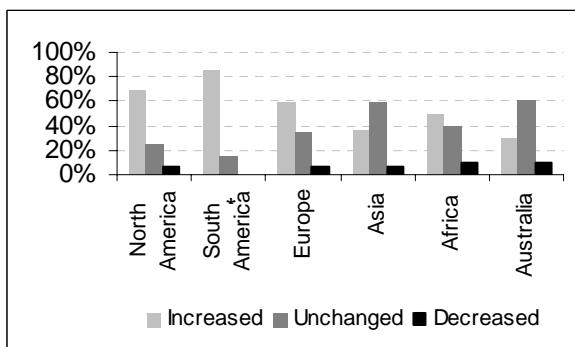
### 2.1.3.6 Travel motivators – Experiencing nature and the outdoors

**Question:** How do you think the importance of the following travel motivators will have changed in your country by 2030? – Experiencing nature and the outdoors

(1)



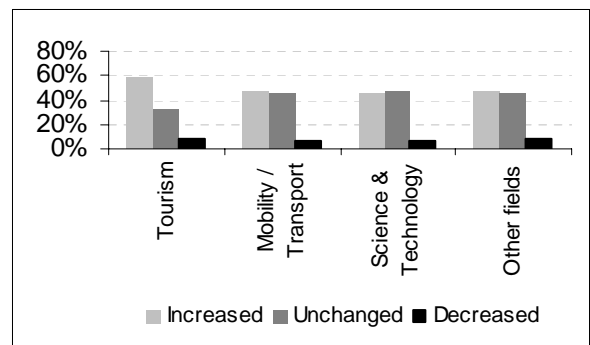
(2) Continent of residence



n = 529

\* less than 10 cases

(3) Interviewees' most important work field



n = 536

(1) For the travel motivator “Experiencing nature and the outdoors” the ratings towards “Increase” and “Decrease” is more or less balanced out (49% / 44%). A smaller share believes that this travel motivator decreases by 2030 (7 %).

(2) The travel motivator “Experiencing nature and the outdoors” is considered as increasing to a high share by North Americans. Asian and Australians experts are less optimistic.

(3) The travel motivator “Experiencing nature and the outdoors” is considered as increasing to a high share by experts employed in the tourist sector.

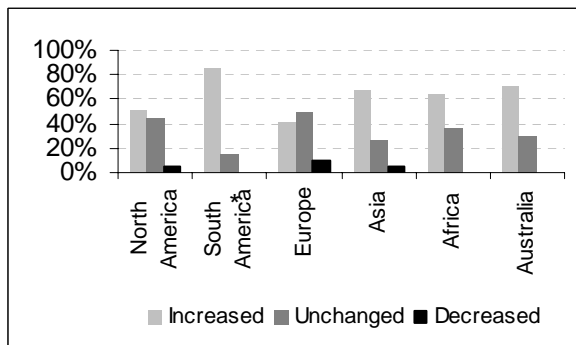
### 2.1.3.7 Travel motivators – Knowledge gain

**Question:** How do you think the importance of the following travel motivators will have changed in your country by 2030? - Trips for learning and gaining knowledge

(1)



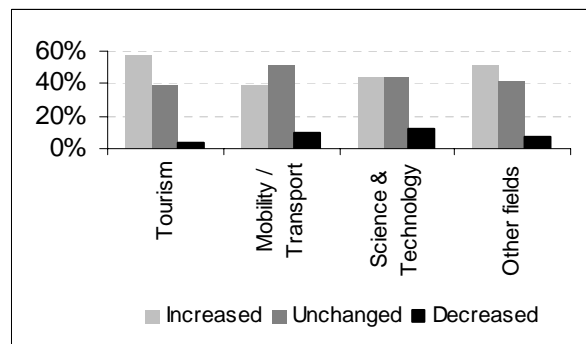
(2) Continent of residence



n = 525

\* less than 10 cases

(3) Interviewees' most important work field



n = 532

- (1) "Trips for learning and gaining knowledge" is seen by the experts in equal parts as an increasing and unchanging travel motivator by 2030.
- (2) Asian, African, and Australian experts believe in an increasing importance for "Trips for learning and gaining knowledge", whereas as European experts tend more to see this travel motivator as unchanged.
- (3) Tourism experts state most often that "Trips for learning and gaining knowledge" is an increasing travel motivator.

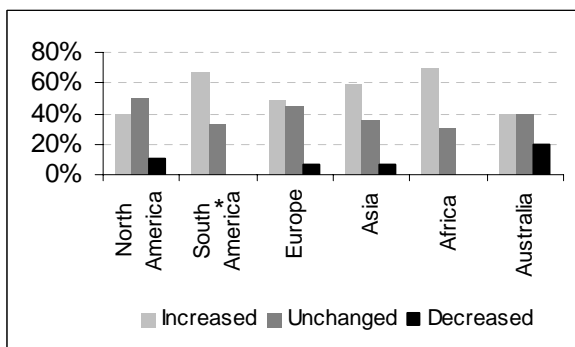
### 2.1.3.8 Travel motivators – Learning, broadening horizons

**Question:** How do you think the importance of the following travel motivators will have changed in your country by 2030? – Learning, broadening horizons

(1)



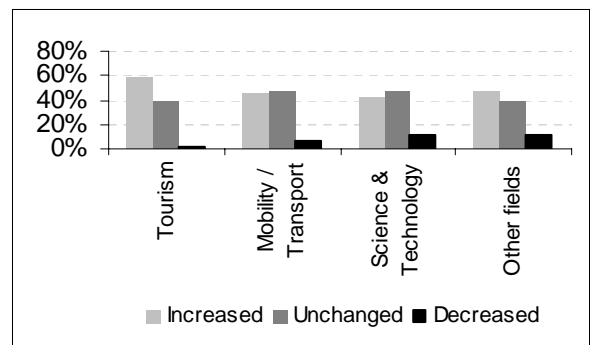
(2) Continent of residence



n = 527

\* less than 10 cases

(3) Interviewees' most important work field



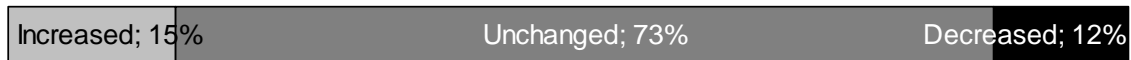
n = 534

- (1) “Learning, broadening horizons” is overall regarded as partly increasing (47 %) and partly unchanged (45 %) by 2030. To a lesser extent it is seen as a decreasing travel motivator.
- (2) African experts believe most that “Learning, broadening horizons” is an increasing travel motivator in 2030, whereas Europeans and North Americans are less optimistic.
- (3) Experts working in the tourist sector consider the travel motivator “Learning, broadening horizons” as increasing to the highest share in comparison to the other experts.

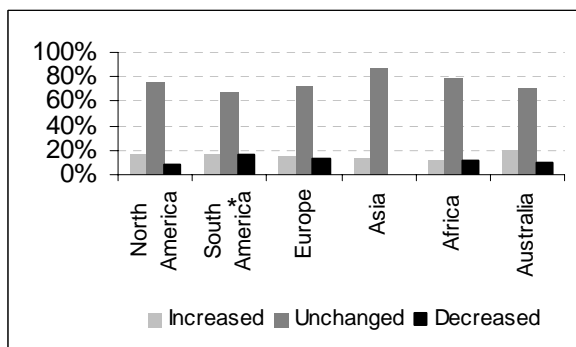
### 2.1.3.9 Travel motivators – Romantic experiences

**Question:** How do you think the importance of the following travel motivators will have changed in your country by 2030? - Romantic experiences

(1)



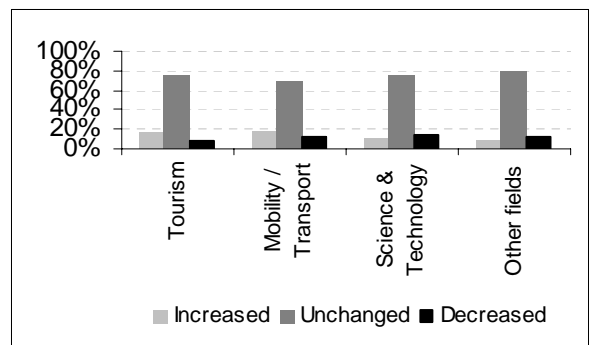
(2) Continent of residence



n = 527

\* less than 10 cases

(3) Interviewees' most important work field



n = 534

(1) "Romantic experiences" as a travel motivator remain to a high share stable by 2030 according to the experts.

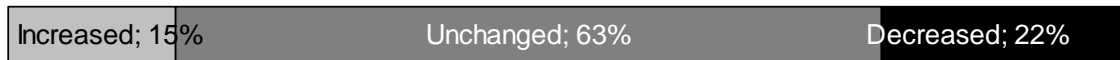
(2) Asians consider the travel motivator "Romantic experiences" to the highest share as stable in comparison to others.

(3) There is only little variance concerning the work field of the interviewees.

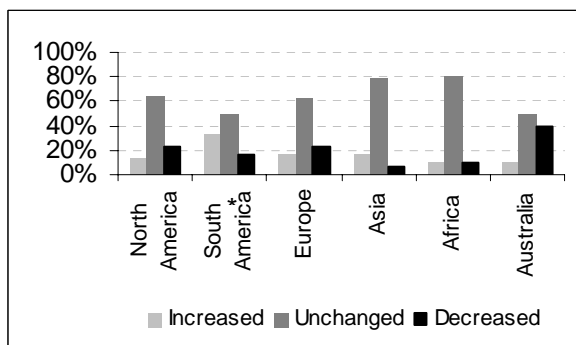
### 2.1.3.10 Travel motivators – Nightlife

**Question:** How do you think the importance of the following travel motivators will have changed in your country by 2030? – Nightlife

(1)



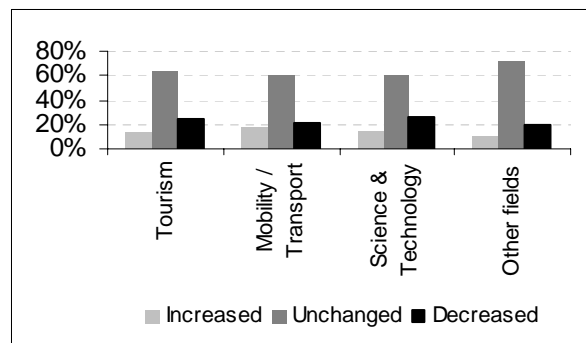
(2) Continent of residence



n = 529

\* less than 10 cases

(3) Interviewees' most important work field



n = 536

(1) “Nightlife” is seen to the highest share as an unchanged travel motivator by 2030 (63 %), while 15 % rate it as an increasing and 22 % as decreasing.

(2) Asian and African experts believe most that “Nightlife” remains on the same level as a travel motivator with regard to other continents.

(3) There is only little variance with regard to work field.



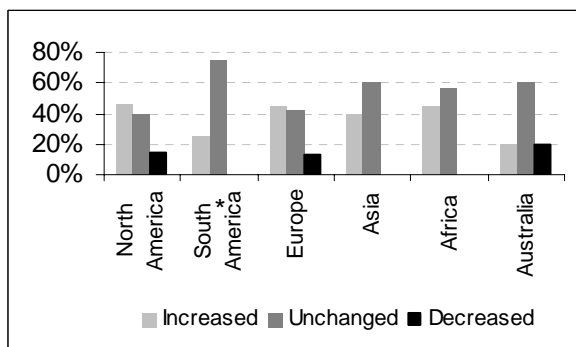
### 2.1.3.11 Travel motivators – Spontaneity

**Question:** How do you think the importance of the following travel motivators will have changed in your country by 2030? – Spontaneous, flexible decisions

(1)



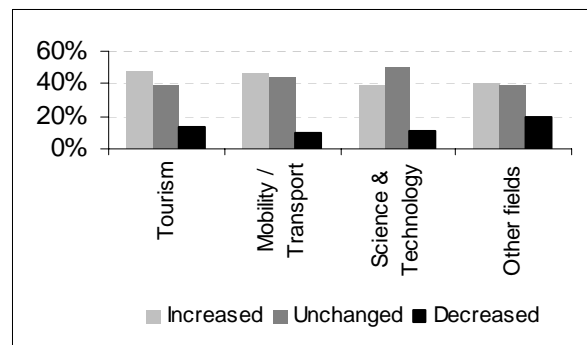
(2) Continent of residence



n = 529

\* less than 10 cases

(3) Interviewees' most important work field



n = 536

- (1) “Spontaneous, flexible decisions” are seen as an increasing travel motivator by 2030 by many experts (44 %), whereas the same share consider it as unchanged.
- (2) Asian and African experts do not believe that “Spontaneous, flexible decisions” will decrease by 2030 at all, whereas European and Australian experts have comparatively high shares in the category “Decreased” (16 % / 18%).
- (3) Employees in the field of Science & Technology stated that “Spontaneous, flexible decisions” remain stable by 2030 most often with regard to other work fields.

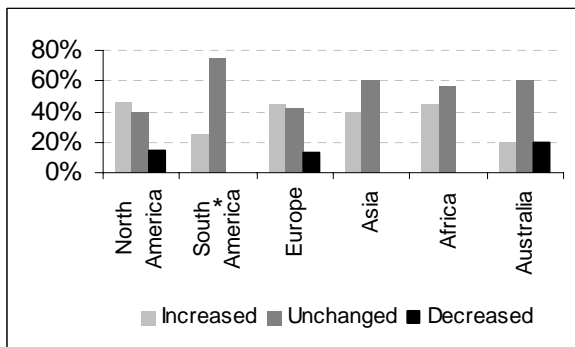
2.1.3.12 Travel motivators – To be pampered

**Question:** How do you think the importance of the following travel motivators will have changed in your country by 2030? - To be pampered

(1)



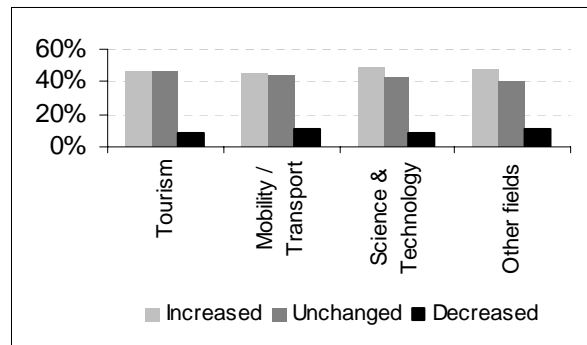
(2) Continent of residence



n = 527

\* less than 10 cases

(3) Interviewees' most important work field



n = 534

(1) "To be pampered" is mostly believed to equal parts both as an increasing and unchanged travel motivator by 2030.

(2) Australian experts do believe comparatively less that "To be pampered" is an increasing travel motivator.

(3) There is only little variance to explore with regard to work field.

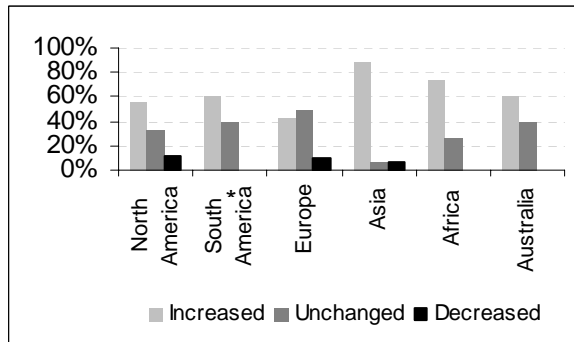
### 2.1.3.13 Travel motivators – Intercultural experiences

**Question:** How do you think the importance of the following travel motivators will have changed in your country by 2030? - intercultural experiences

(1)



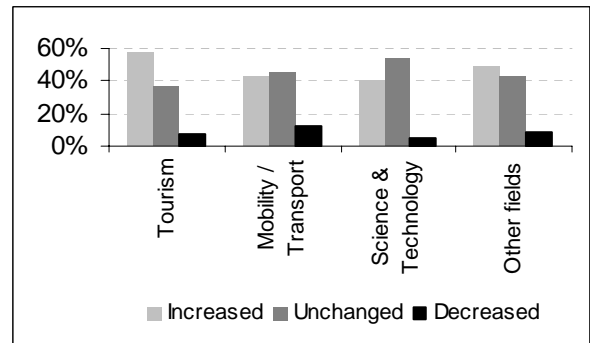
(2) Continent of residence



n = 526

\* less than 10 cases

(3) Interviewees' most important work field



n = 533

(1) “Intercultural experiences” are seen to a high share as an increasing travel motivator (46 %). Furthermore, it is seen to the same share as unchanged by 2030.

(2) Asian, African, and Australian experts most often consider the category “Increasing” for the travel motivator “Intercultural changes”. European experts believe to the smallest share that an increase in this travel motivator “Intercultural experiences” will arise by 2030.

(3) Employees in the field of tourism believe that this travel motivator increase to the highest share in comparison to other employment fields.

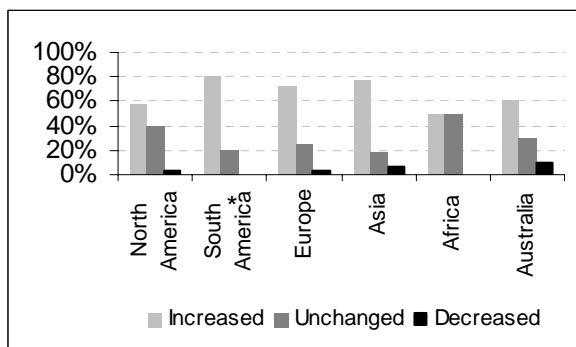
### 2.1.3.14 Travel motivators – Health prevention

**Question:** How do you think the importance of the following travel motivators will have changed in your country by 2030? - Preventive health tourism

(1)



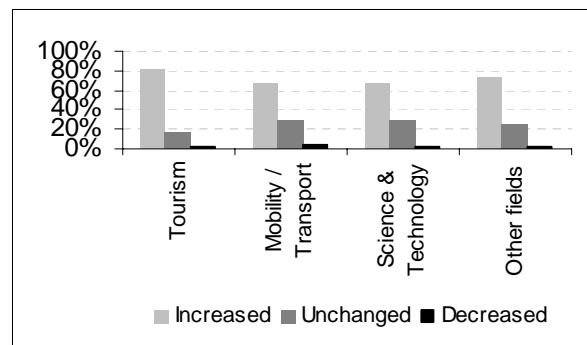
(2) Continent of residence



n = 528

\* less than 10 cases

(3) Interviewees' most important work field



n = 535

- (1) The majority of experts believe that the travel motivator “Preventive health tourism” will increase by 2030.
- (2) European and Asian experts believe most that the travel motivator “Preventive health tourism” will increase by 2030, followed by Australian, North American and African experts.
- (3) Employees in the field of tourism believe that this travel motivator increase to the highest share in comparison to other employment fields.

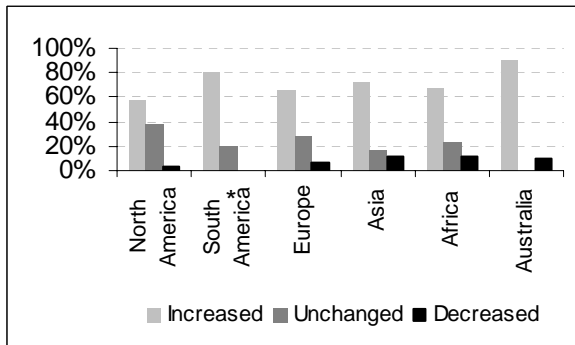
2.1.3.15 Travel motivators – Health rehabilitation

**Question:** How do you think the importance of the following travel motivators will have changed in your country by 2030? - Health tourism for rehabilitation purposes

(1)



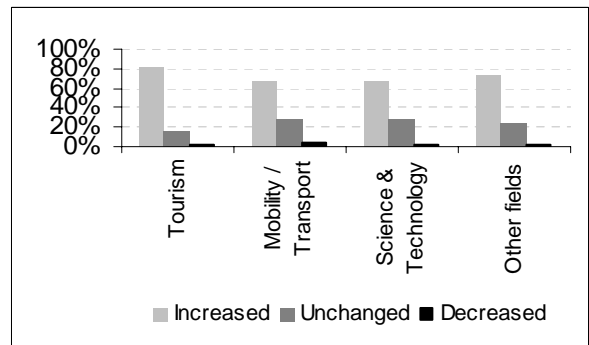
(2) Continent of residence



n = 527

\* less than 10 cases

(3) Interviewees' most important work field



n = 534

- (1) The majority of experts believe that the relevance of “Health tourism for rehabilitation purposes” increases by 2030.
- (2) Australian experts state most often that “Health tourism for rehabilitation purposes” will increase by 2030, whereas North Americans are more pessimistic.
- (3) Experts in the field of tourism rate this travel motivator especially high.

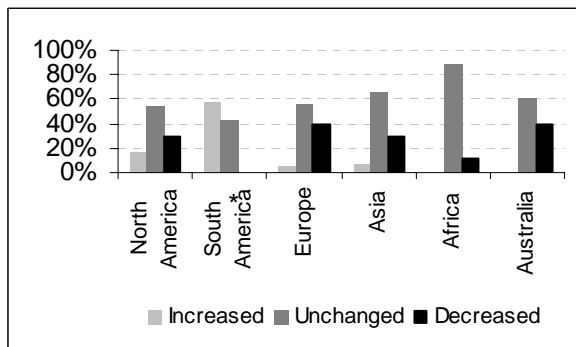
2.1.3.16 Travel motivators – Beach holidays

**Question:** How do you think the importance of the following travel motivators will have changed in your country by 2030? - Classical beach holidays (sun and beach)

(1)



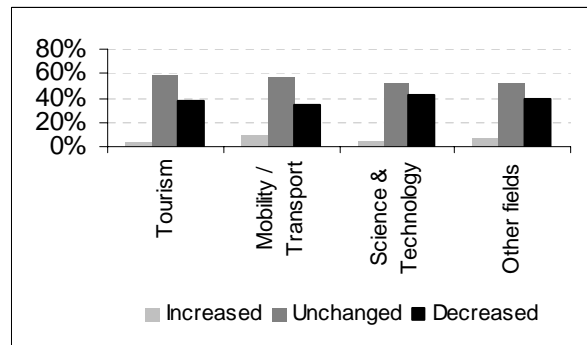
(2) Continent of residence



n = 527

\* less than 10 cases

(3) Interviewees' most important work field



n = 534

(1) Nearly 40 % of the experts believe that “Classical beach holidays (sun and beach)” will decrease by 2030. A further high share (56 %) considers “Classical beach holidays (sun and beach)” as an unchanged travel motivator.

(2) Australian and European experts believe most that “Classical beach holidays (sun and beach)” will decrease by 2030.

(3) There is only little variance to explore with regard to work field.

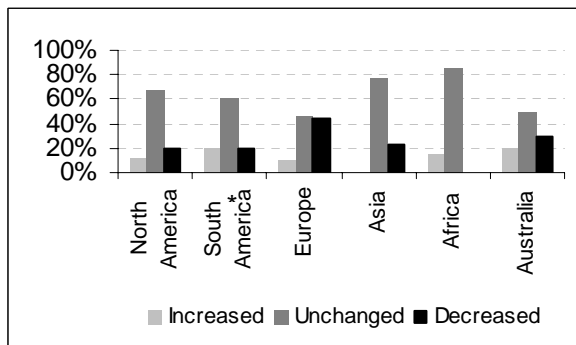
### 2.1.3.17 Travel motivators – Winter sport holidays

**Question:** How do you think the importance of the following travel motivators will have changed in your country by 2030? - Traditional winter sport holidays (sun and snow)

(1)



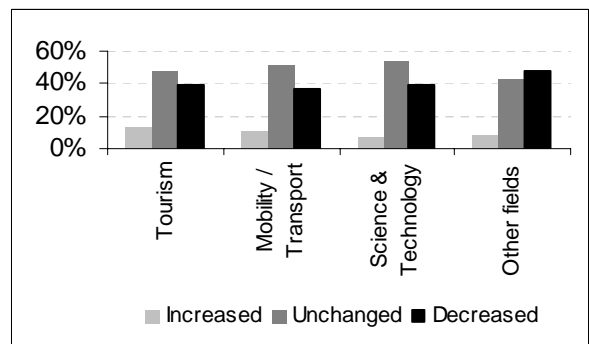
(2) Continent of residence



n = 527

\* less than 10 cases

(3) Interviewees' most important work field



n = 534

- (1) "Traditional winter sport holiday (sun and snow)" is regarded to a high share as a decreasing travel motivator. Half of the experts stated that "Traditional winter sport holiday (sun and snow)" remain stable by 2030.
- (2) European and Australian experts believe that "Traditional winter sport holiday (sun and snow)" is of decreasing importance by 2030 most.
- (3) There are only small differences with regard to interviewees' most important work field.

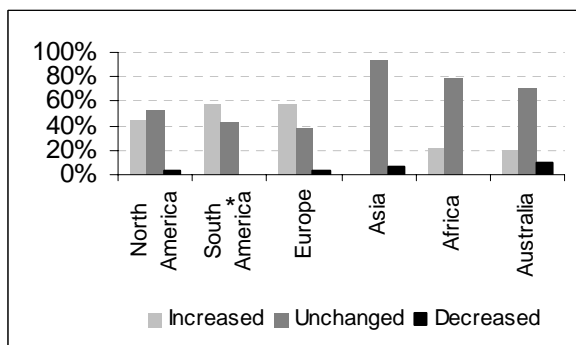
### 2.1.3.18 Travel motivators – Sports, physical activities

**Question:** How do you think the importance of the following travel motivators will have changed in your country by 2030? – Active sports trips

(1)



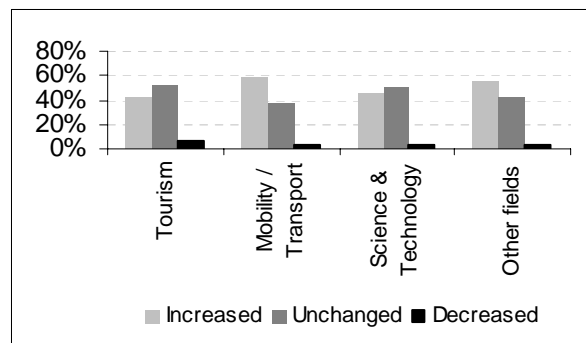
(2) Continent of residence



n = 527

\* less than 10 cases

(3) Interviewees' most important work field



n = 534

- (1) The majority of interviewees consider “Active sports trips” as an increasing travel motivator (53 %).
- (2) Asia, Africa, and Australia do to a small (no) extent believe that “Active sports trips” is an increasing travel motivator, whereas European and North American experts present the highest share of an agreement with category “Increased” by 2030.
- (3) Experts from the mobility / transport sector most consider “Active sports trips” as an increasing travel motivator.



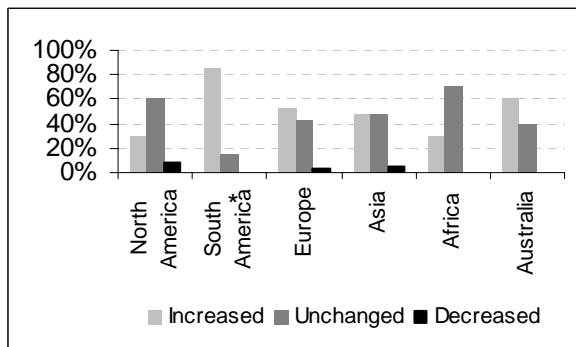
2.1.3.19 Travel motivators – Event tourism (sport, show, concert, culture)

**Question:** How do you think the importance of the following travel motivators will have changed in your country by 2030? - Event tourism (sport, show, concert, culture)

(1)



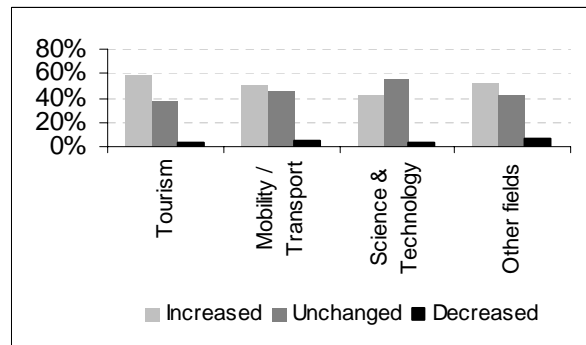
(2) Continent of residence



n = 528

\* less than 10 cases

(3) Interviewees' most important work field



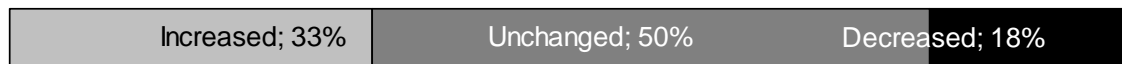
n = 535

- (1) “Event tourism (sport, show, concert, culture)” is believed to a high share as an increasing travel motivator sector by the experts.
- (2) Australian experts agree with the statement “Increased” most concerning “Event tourism (sport, show, concert, culture)” as a travel motivator.
- (3) Tourism experts consider “Event tourism (sport, show, concert, culture)” as an increasing travel motivator most.

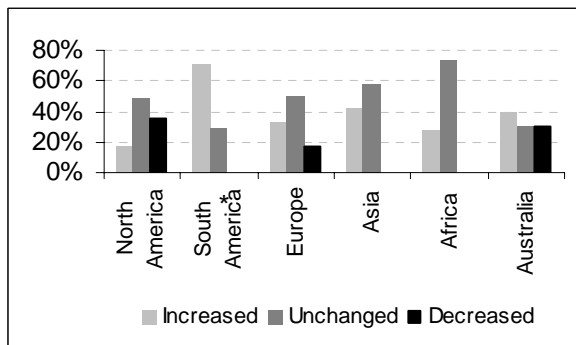
### 2.1.3.20 Travel motivators – MICE, business trips

**Question:** How do you think the importance of the following travel motivators will have changed in your country by 2030? - MICE (meetings, incentives, conventions, events) business trips

(1)



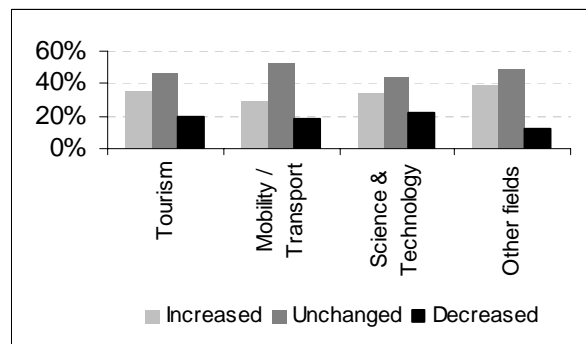
(2) Continent of residence



n = 527

\* less than 10 cases

(3) Interviewees' most important work field



n = 540

(1) About 30 % of the experts believe that the travel motivator “MICE (meetings, incentives, conventions, events) business trips” are of increasing importance by 2030, whereas half of the experts considered it as a stable travel motivator.

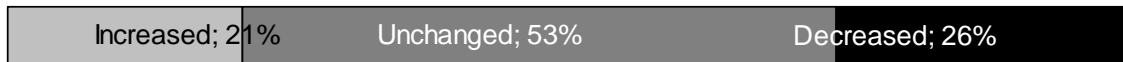
(2) In contrast to other experts, North American and Australian experts believe that the importance of “MICE (meetings, incentives, conventions, events) business trips” is increasing by 2030.

(3) There is only little variance to explore with regard to interviewees' work field.

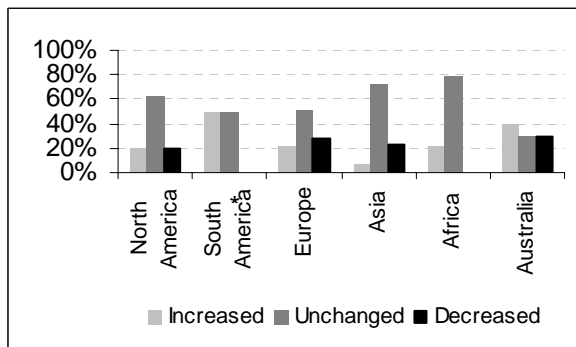
2.1.3.21 Modal choice – Prestige of the means of transportation

**Question:** By 2030, how will the importance of the following factors have changed for people in your country when it comes to choosing a means of transportation? – Prestige of the means of transportation

(1)



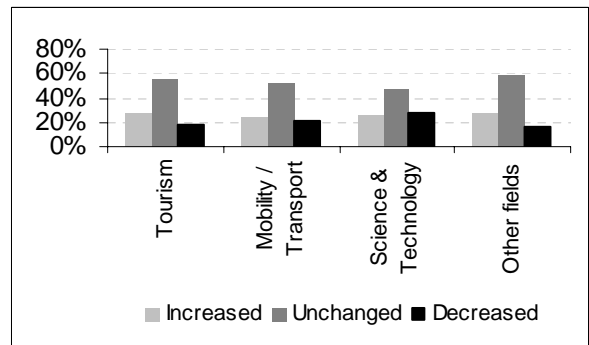
(2) Continent of residence



n = 529

\* less than 10 cases

(3) Interviewees' most important work field



n = 536

(1) When it comes to choosing a means of transportation the “Prestige of the means of transportation” is mostly seen as unchanged.

(2) Australian experts state relatively often that the importance of prestige will increase.

(3) There are only minor differences with regard to work fields.

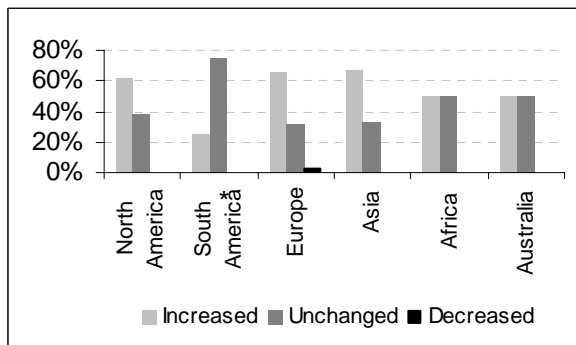
### 2.1.3.22 Modal choice – Comfort

**Question:** By 2030, how will the importance of the following factors have changed for people in your country when it comes to choosing a means of transportation? - Comfort of the means of transportation

(1)



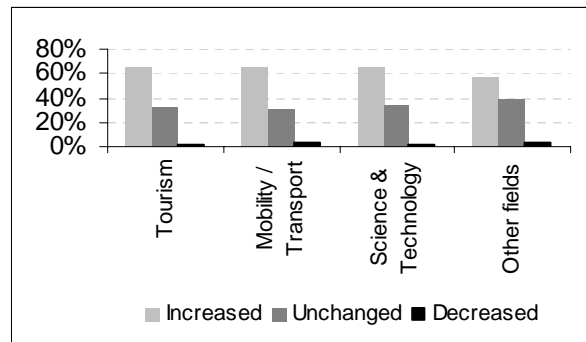
(2) Continent of residence



n = 530

\* less than 10 cases

(3) Interviewees' most important work field



n = 535

(1) When it comes to choosing a means of transportation the “Comfort of the means of transportation” is considered of increasing importance by 2030.

(2) North American, Asian and European experts mostly consider “Comfort of the means of transportation” of increasing importance.

(3) There are only minor differences with regard to work fields.

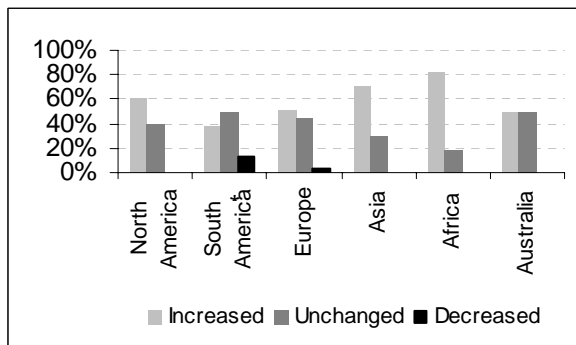
2.1.3.23 Modal choice – Safety / low risk of accident

**Question:** By 2030, how will the importance of the following factors have changed for people in your country when it comes to choosing a means of transportation? – Safety / low risk of accident

(1)



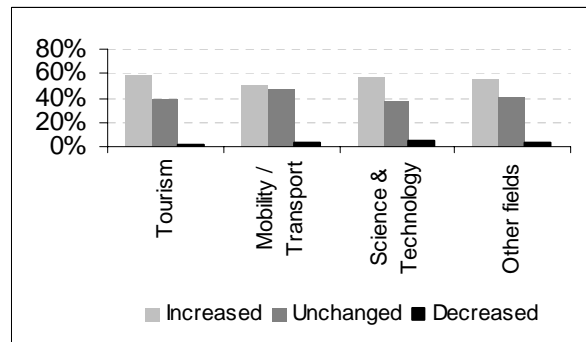
(2) Continent of residence



n = 528

\* less than 10 cases

(3) Interviewees' most important work field



n = 536

(1) When it comes to choosing a means of transportation experts believe that the aspect of “Safety / low risk of accident” is of increasing relevance.

(2) African and Asian experts stated that by 2030 “Safety / low risk of accident” is increasing to a higher degree than other experts.

(3) There are only minor differences with regard to work fields.

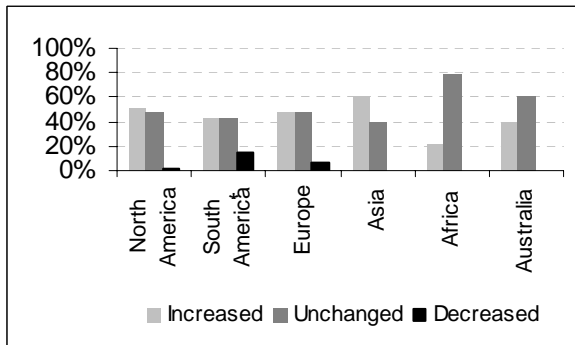
2.1.3.24 Modal choice – Ensuring privacy

**Question:** By 2030, how will the importance of the following factors have changed for people in your country when it comes to choosing a means of transportation? - Ensuring privacy, not getting disturbed

(1)



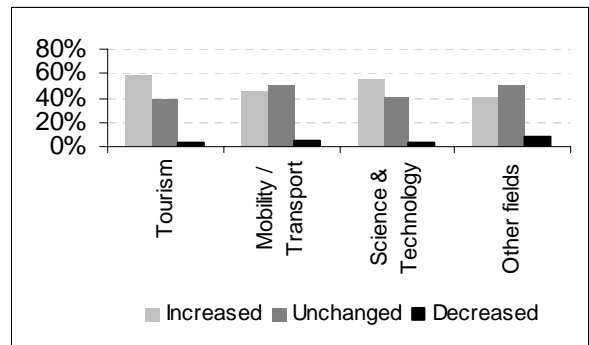
(2) Continent of residence



n = 529

\* less than 10 cases

(3) Interviewees' most important work field



n = 536

(1) Almost 50% of all experts think that the issue of “Ensuring privacy, not getting disturbed” will become more important.

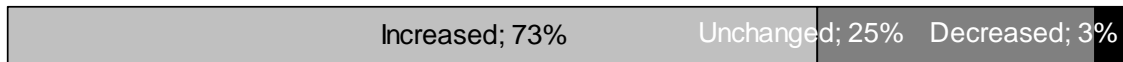
(2) Asian experts consider the issue of “Ensuring privacy, not getting disturbed” important more often than other experts.

(3) There are only minor differences with regard to work fields.

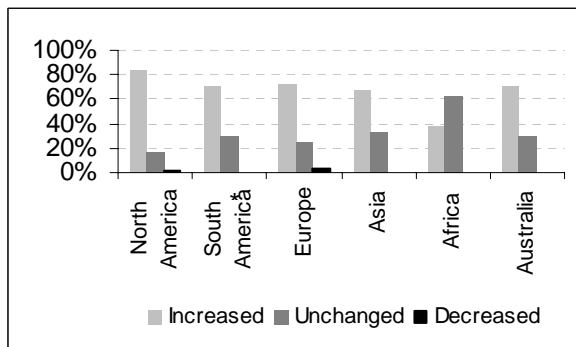
2.1.3.25 Modal choice – Environment, ecology

**Question:** By 2030, how will the importance of the following factors have changed for people in your country when it comes to choosing a means of transportation? - Environmentally friendly means of transportation

(1)



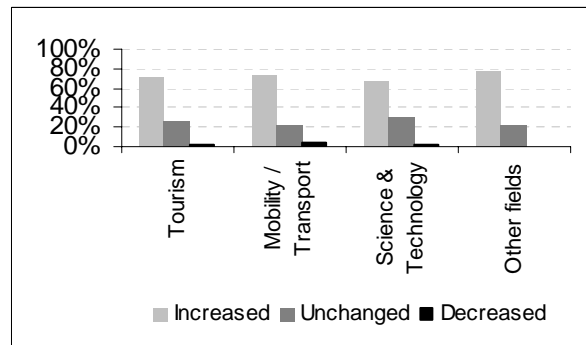
(2) Continent of residence



n = 529

\* less than 10 cases

(3) Interviewees' most important work field



n = 534

(1) The vast majority of experts (73 %) agree that “Environmental friendliness” is of increasing importance for transportation systems when customers make modal choices.

(2) North American experts most often see an increased relevance of environmental friendliness” when it comes to making modal choice.

(3) There are only minor differences with regard to work fields.

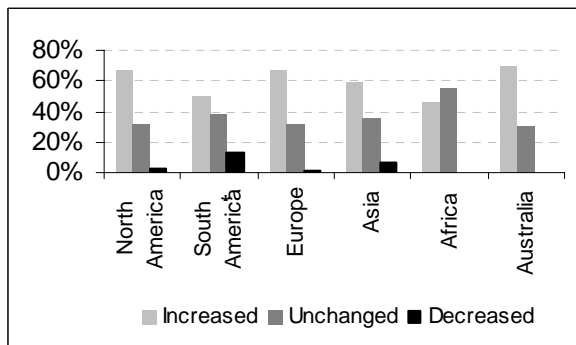
### 2.1.3.26 Modal choice – Travel time

**Question:** By 2030, how will the importance of the following factors have changed for people in your country when it comes to choosing a means of transportation? - Travel time (door-to-door)

(1)



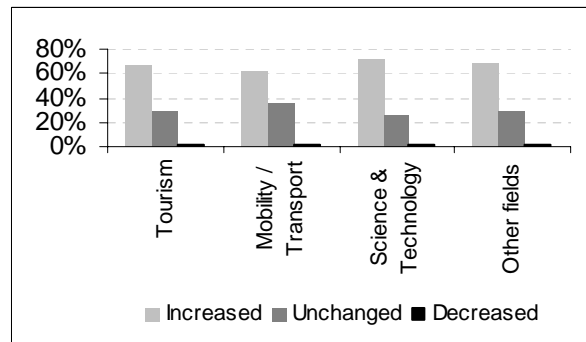
(2) Continent of residence



n = 527

\* less than 10 cases

(3) Interviewees' most important work field



n = 534

(1) When it comes to choosing a means of transportation the aspect of “Travel time (door-to-door)” is seen as of increasing importance.

(2) With the exception on African experts, all experts consider “Travel time (door-to-door)” as of increasing importance.

(3) There are only little differences with regard to work fields..



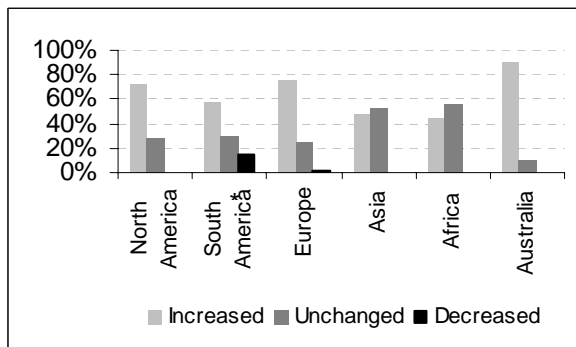
2.1.3.27 Modal choice – Frequency of schedule

**Question:** By 2030, how will the importance of the following factors have changed for people in your country when it comes to choosing a means of transportation? - Frequency of schedule

(1)



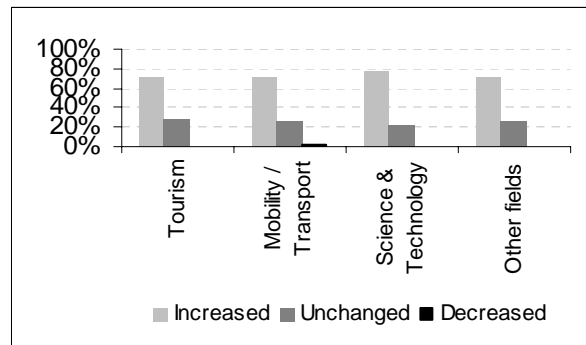
(2) Continent of residence



n = 527

\* less than 10 cases

(3) Interviewees' most important work field



n = 532

- (1) When it comes to choosing a means of transportation the issue of “Frequency of schedule” is regarded as increasingly important by the majority of experts.
- (2) Australian, European and North American experts see an increasing importance of “Frequency of schedule”, while Asian and African experts seen to be divided over the matter.
- (3) There are only minor differences with regard to work field.

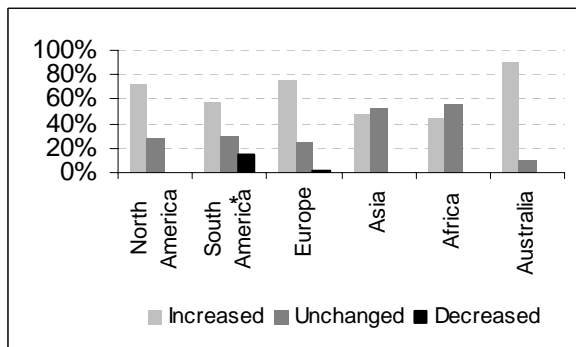
2.1.3.28 Modal choice – Flexibility of use

**Question:** By 2030, how will the importance of the following factors have changed for people in your country when it comes to choosing a means of transportation? - Flexibility of use

(1)



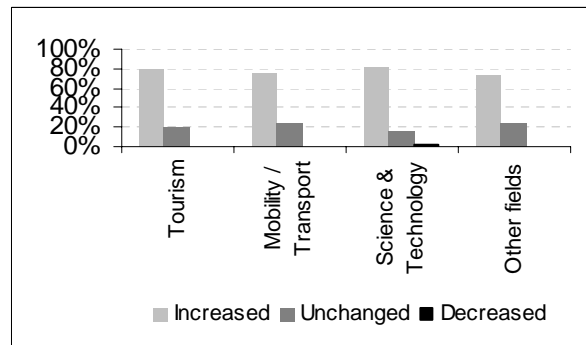
(2) Continent of residence



n = 527

\* less than 10 cases

(3) Interviewees' most important work field



n = 539

(1) When it comes to choosing a means of transportation the “Flexibility of use” is regarded to be of increasing importance by 2030.

(2) Australian experts agree to a vast extent that “Flexibility of use” is of increasing importance by 2030.

(3) There are only minor differences with regard to work fields.

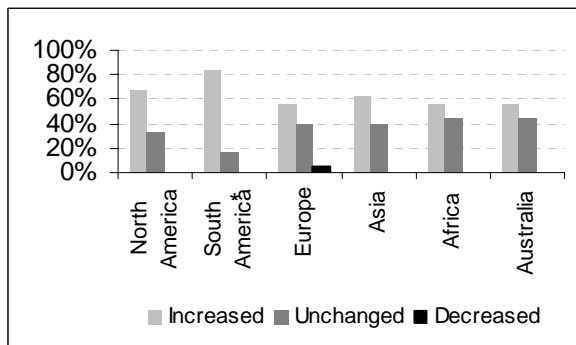
### 2.1.3.29 Modal choice – Transferability of ticket

**Question:** By 2030, how will the importance of the following factors have changed for people in your country when it comes to choosing a means of transportation? - Transferability of ticket

(1)



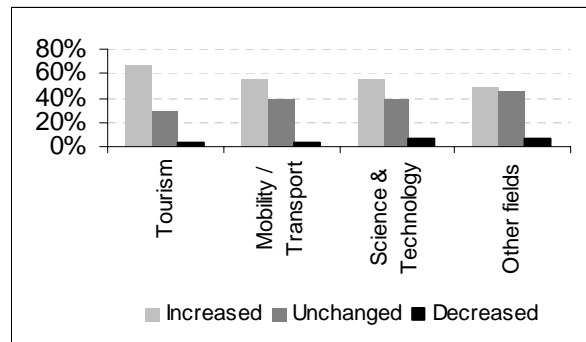
(2) Continent of residence



n = 526

\* less than 10 cases

(3) Interviewees' most important work field



n = 532

- (1) When it comes to choosing a means of transportation the “Transferability of ticket” is seen as of increasing importance by the experts.
- (2) The majority of experts of all countries consider a “Transferability of ticket” as of growing importance by 2030.
- (3) There are only minor differences with regard to work field. Tourism experts tend to agree more often that “Transferability of ticket” will become more relevant.

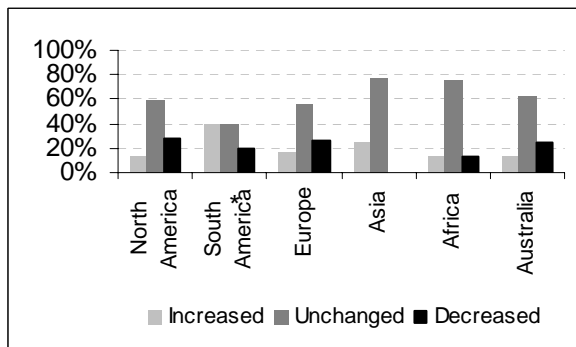
### 2.1.3.30 Modal choice – Separation between 1st and 2nd class

**Question:** By 2030, how will the importance of the following factors have changed for people in your country when it comes to choosing a means of transportation? - Difference / separation between 1st and 2nd class

(1)



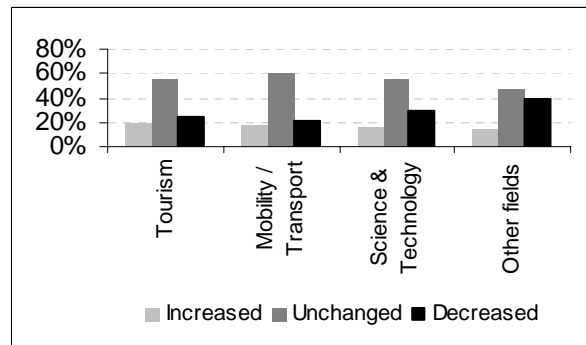
(2) Continent of residence



n = 525

\* less than 10 cases

(3) Interviewees' most important work field



n = 534

(1) When it comes to choosing a means of transportation the aspect “Difference / Separation between first class and second class” is seen to remain an important factor by most experts. A quarter of all experts see a decreasing relevance, a minority (17%) sees an increasing importance.

(2) There are only minor differences with regard to continent.

(3) There are only minor differences with regard to work fields.

## 2.2 Supply and Demand

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

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

### 2.2.1 Key findings

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

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

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

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

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

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

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

- **The demand for short private trips will increase.**

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

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

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

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

Private trips are expected to become shorter. Business trips are expected to become significantly shorter. *Details* → pages 58f and 88; 89; 90.

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

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

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

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

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

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

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

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

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

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

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

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

## 2.2.2 Comparisons

### 2.2.2.1 Services

Internet-based hotel ratings by clients	<p>86% 12% 2%</p> <p>□ Importance increases   ■ Unchanged   ■ Importance decreases</p>
Live travel information via mobile phone	<p>85% 12% 3%</p> <p>□ Importance increases   ■ Unchanged   ■ Importance decreases</p>
Online travel communities	<p>84% 14% 2%</p> <p>□ Importance increases   ■ Unchanged   ■ Importance decreases</p>
Personalized travel information, customer profiles	<p>81% 17% 2%</p> <p>□ Importance increases   ■ Unchanged   ■ Importance decreases</p>
Dynamic packaging	<p>79% 20% 1%</p> <p>□ Importance increases   ■ Unchanged   ■ Importance decreases</p>
Privacy zones, lounges	<p>53% 43% 4%</p> <p>□ Importance increases   ■ Unchanged   ■ Importance decreases</p>
Booking trips through travel agencies	<p>5% 23% 73%</p> <p>□ Importance increases   ■ Unchanged   ■ Importance decreases</p>

Details: → pages 59; 60; 61; 62; 63; 64; 65.

### 2.2.2.2 All inclusive packages & services

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

Details → pages 66; 67; 68; 69; 70; 71.

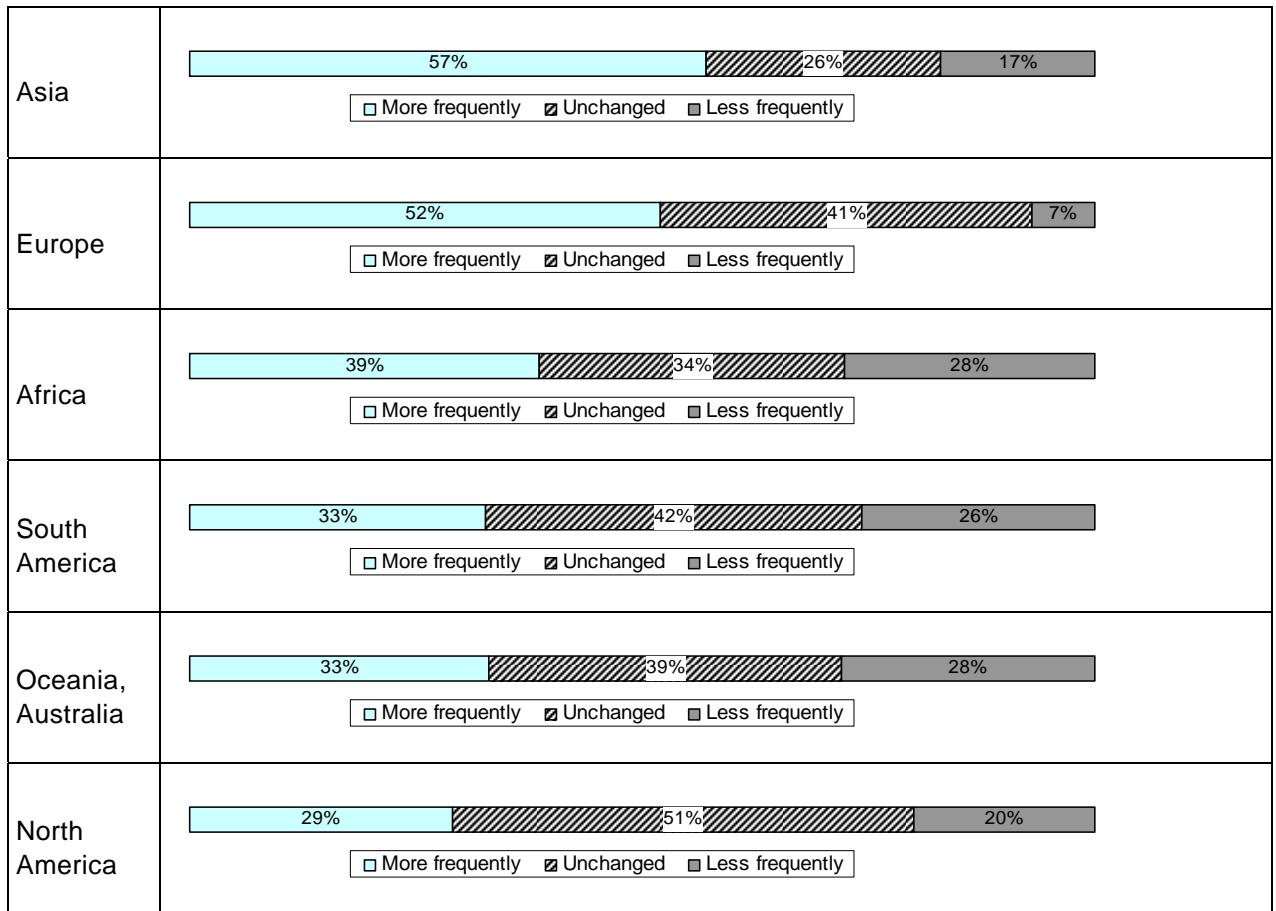


### 2.2.2.3 Holiday trips & Destination types



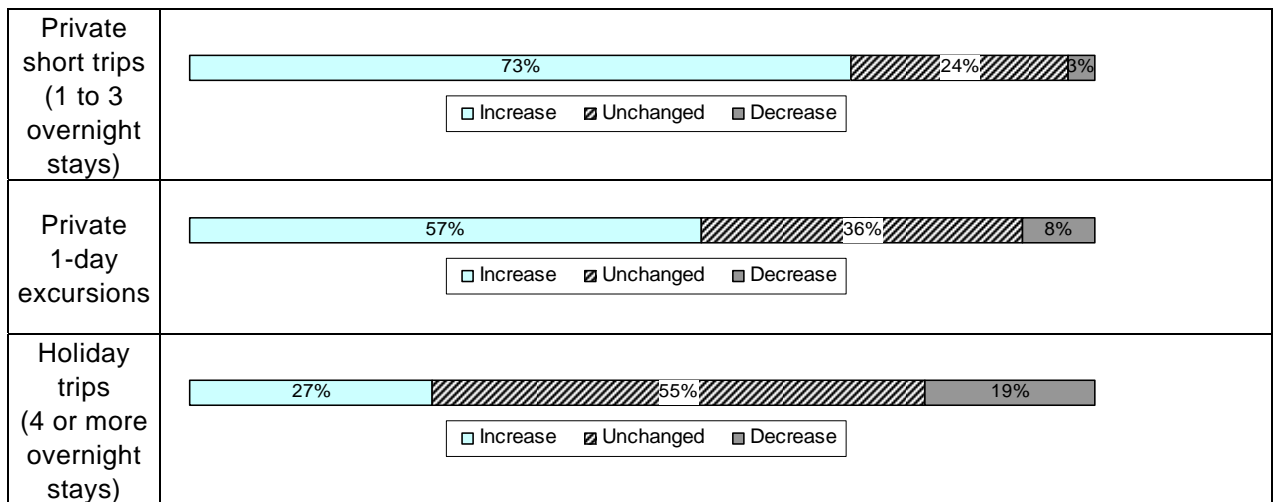
Regional destinations and cities are expected to be frequented more often for holiday trips. *Details* → pages 75; 76; 77; 78; 79.

#### 2.2.2.4 Holiday trips & Continents



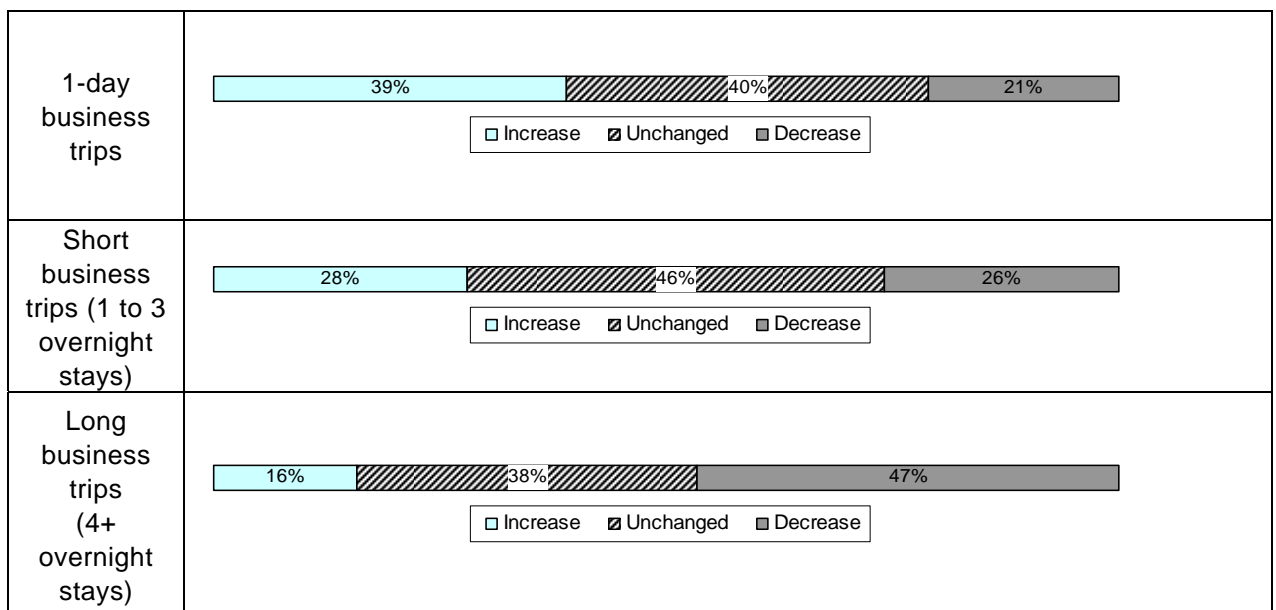
Asia, Europe and Africa are expected to be visited significantly more often.  
*Details → pages 80; 81; 82; 83; 84; 85.*

### 2.2.2.5 Travel demand & Duration & Private trips



Private trips are expected to be shorter. *Details* → pages 88; 89; 90.

### 2.2.2.6 Travel demand & Duration & Business trips



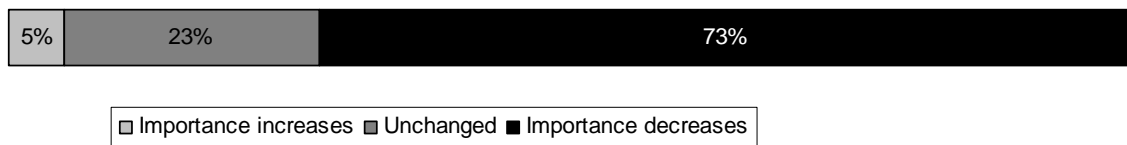
Business trips are expected to become significantly shorter. *Details* → pages 91; 92; 93.

## 2.2.3 Fact sheets

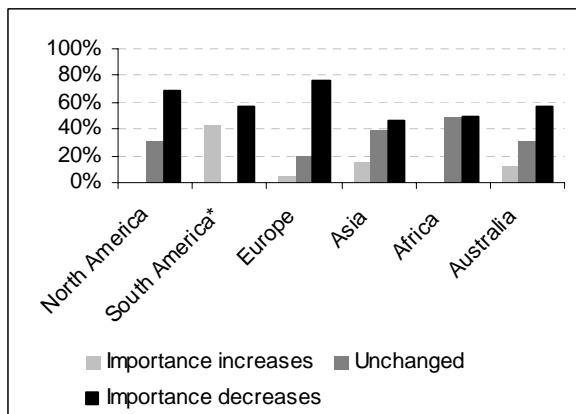
### 2.2.3.1 Services – Booking trips through travel agencies

**Question:** How will the importance of the following services change for clients in your country by 2030? - Booking trips through travel agencies

(1)



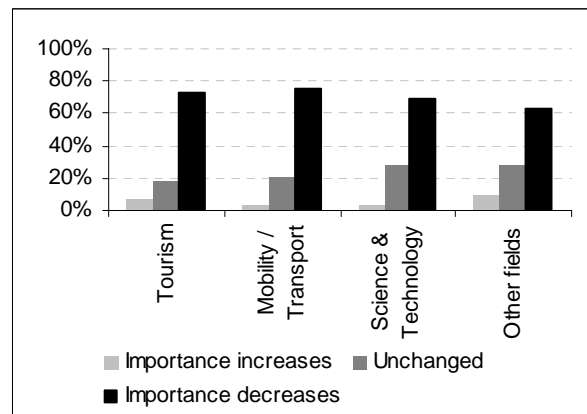
(2) Continent of residence



n = 527

\* less than 10 cases

(3) Interviewees' most important work field



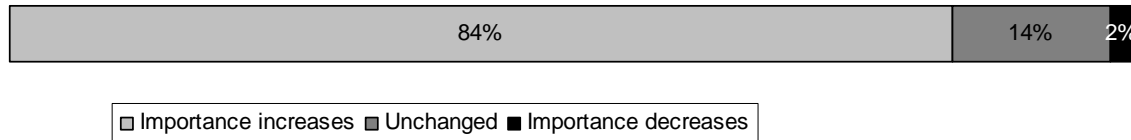
n = 540

- (1) The majority of experts (73%) consider that the importance of the service of booking trips through travel agencies, by 2030, will decrease. Just 23% of the experts believe that the importance of this service will stay unchanged.
- (2) Experts from all continents consider that the importance of this service will decrease by 2030. Especially the European (77%) and the North American experts (69%) anticipate a decreasing importance of this service. By contrast just 50% of the African experts believe that the importance of this service will decrease.
- (3) The majority of experts of all work fields consider the importance of the service of booking trips through travel agencies as weakening by 2030.

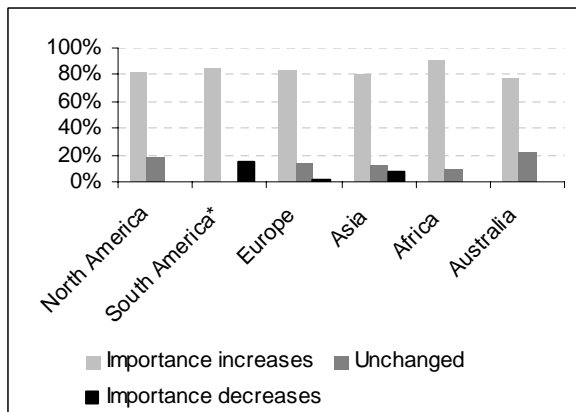
### 2.2.3.2 Services – Online travel communities

**Question:** How will the importance of the following services change for clients in your country by 2030? - Online travel communities

(1)



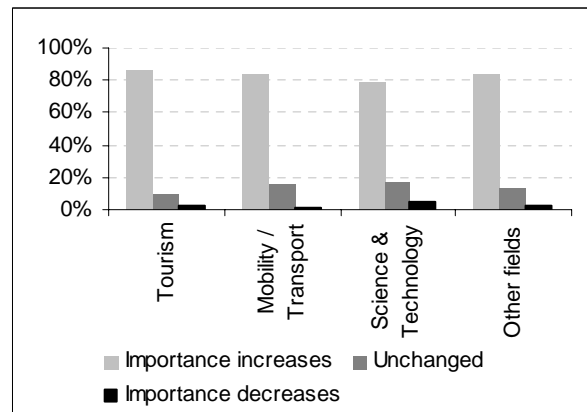
(2) Continent of residence



n = 526

\* less than 10 cases

(3) Interviewees' most important work field



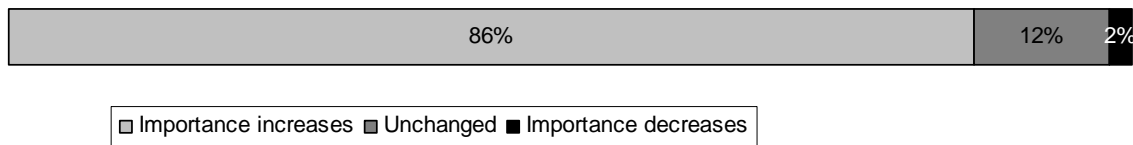
n = 532

- (1) The majority of experts (84%) consider that the importance of the service of online communities will increase by 2030. Just 14% of the experts believe that the importance of this service will stay unchanged.
- (2) Experts from all continents strongly consider that the importance of this service will increase by 2030 (e.g. 91% of the African and 84% of the European experts anticipate an increasing importance).
- (3) The majority of experts of all work fields strongly consider the importance of this service as increasing by 2030 (e.g. 87% of the tourism and 84% of the mobility and transport experts believe that the importance of this service will increase).

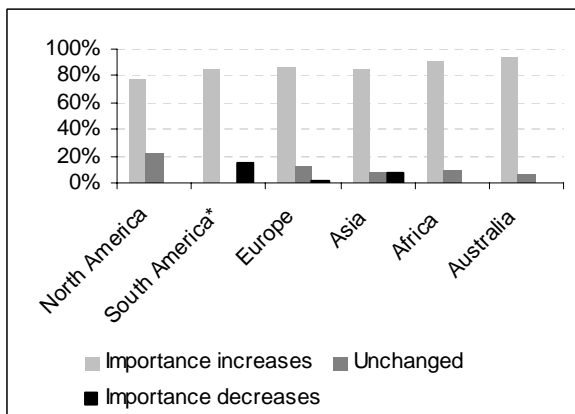
### 2.2.3.3 Services – Internet-based hotel ratings by clients

**Question:** How will the importance of the following services change for clients in your country by 2030? - Internet-based hotel ratings by clients

(1)



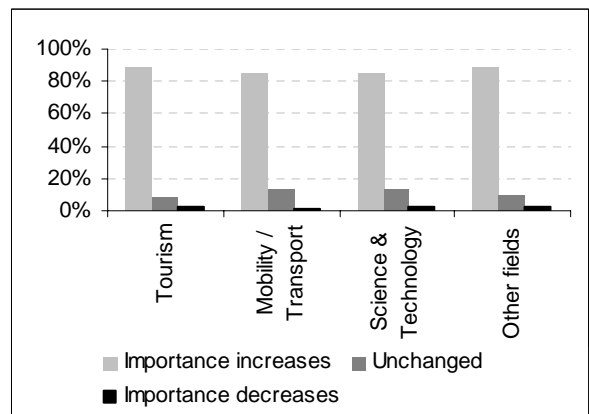
(2) Continent of residence



n = 527

\* less than 10 cases

(3) Interviewees' most important work field



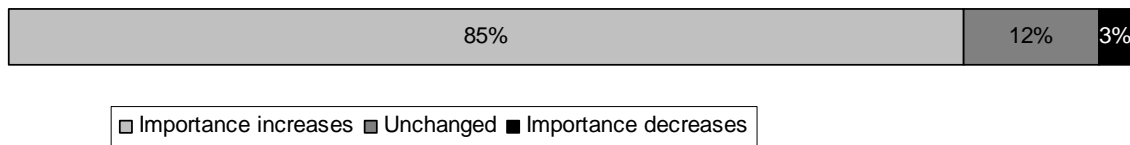
n = 533

- (1) Most of the experts (86%) consider the importance of the service of Internet-based hotel ratings by clients as increasing. Just 12% of the experts believe that the importance of this service will stay unchanged.
- (2) Experts from all continents strongly consider that the importance of this service will increase by 2030 (e.g. 94% of the Australian, 92% of the African and 87% of the European experts anticipate an increasing importance).
- (3) The majority of experts of all work fields strongly consider the importance of this service as increasing by 2030 (e.g. 89% of the tourism and 85% of the mobility and transport experts believe that the importance of this service will increase).

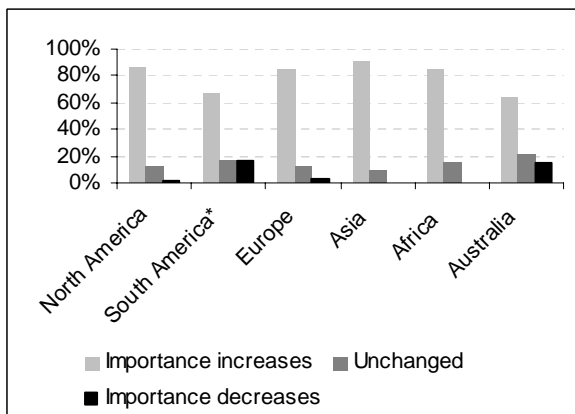
2.2.3.4 Services – Live travel information via mobile phone

**Question:** How will the importance of the following services change for clients in your country by 2030? - Live travel information via mobile phone

(1)



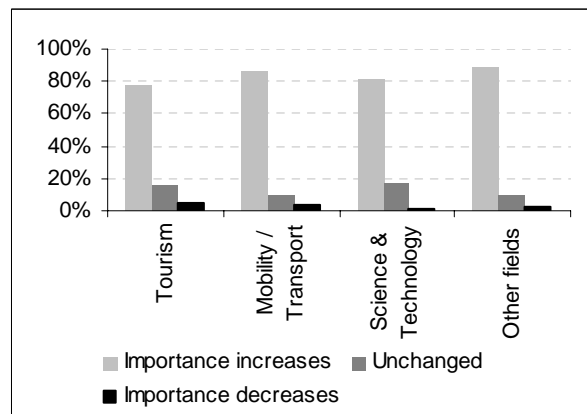
(2) Continent of residence



n = 528

\* less than 10 cases

(3) Interviewees' most important work field



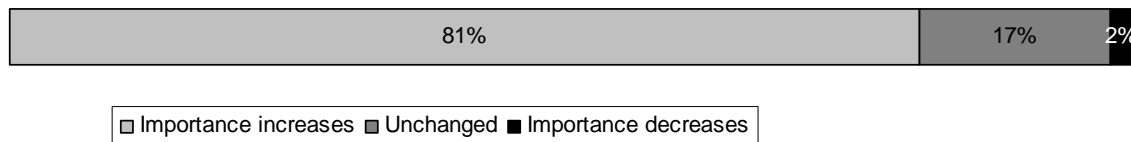
n = 534

- (1) The majority of experts (85%) consider that the importance of the service of live travel information via mobile phone will increase. Just 12% of the experts believe that the importance of this service will stay unchanged.
- (2) Experts from all continents strongly consider that the importance of this service will increase by 2030 (e.g. 91% of the Asian, 87% of the North American and 86% of the African experts anticipate an increasing importance).
- (3) 87% of the mobility and transport, 82% of the science and technology and 78% of the tourism experts consider that the importance of this service will increase by 2030.

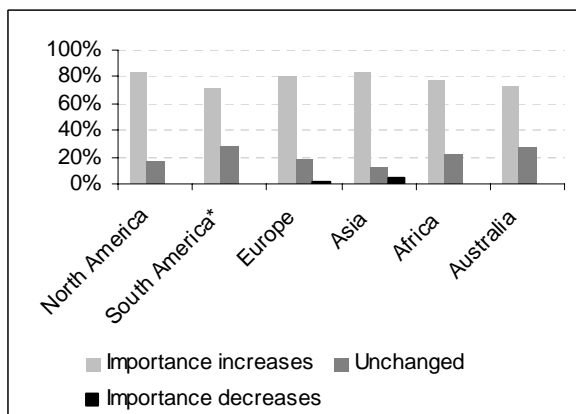
### 2.2.3.5 Services – Personalized travel information

**Question:** How will the importance of the following services change for clients in your country by 2030? - Personalized travel information based on individual customer profiles

(1)



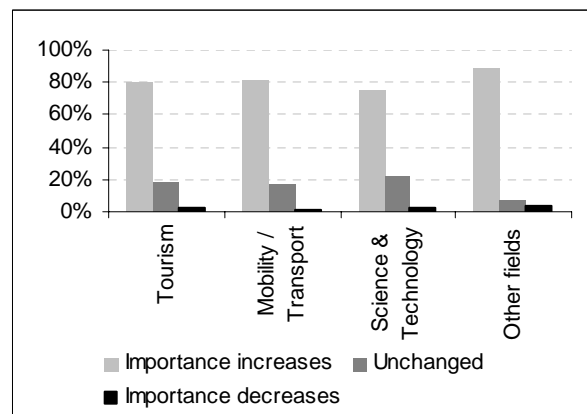
(2) Continent of residence



n = 527

\* less than 10 cases

(3) Interviewees' most important work field



n = 533

(1) 81% of the experts anticipate that the importance of the service of personalized travel information based on individual customer profiles will change for clients in their country by 2030. 17% of the experts consider that the importance of this service will stay unchanged and just 2% of the experts anticipate a decreasing importance.

(2) 84% of the North American and Asian experts believe in an increase of importance. In comparison just 73% of the Australian experts anticipate an increase.

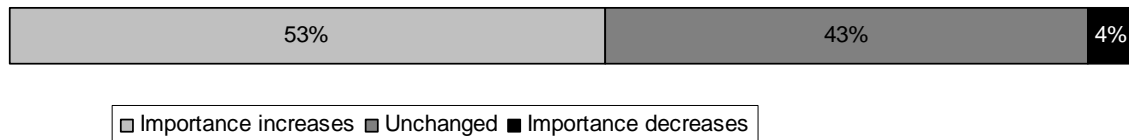
(3) The majority of experts of all work fields strongly consider the importance of this service as increasing by 2030 (e.g. 82% of the mobility and transport and 80% of the tourism experts believe that the importance of this service will increase).



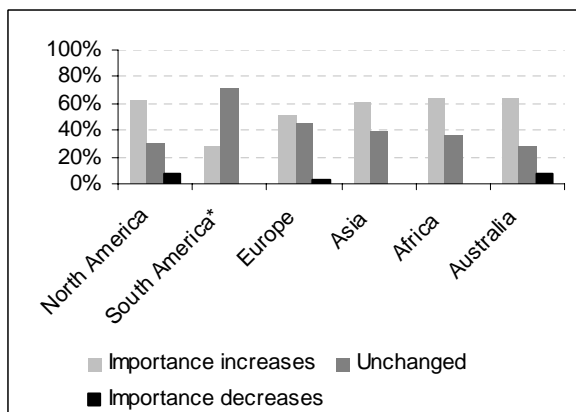
### 2.2.3.6 Services – Privacy zones, lounges

**Question:** How will the importance of the following services change for clients in your country by 2030? - Privacy zones, lounges

(1)



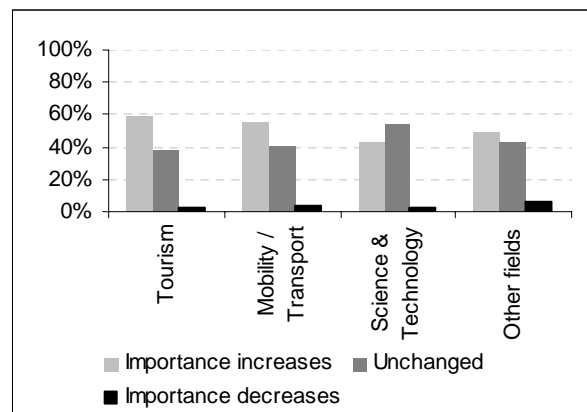
(2) Continent of residence



n = 524

\* less than 10 cases

(3) Interviewees' most important work field



n = 530

(1) 53% of the experts consider that the importance of the service of privacy zones and/or lounges will increase by 2030. 43% believe otherwise and anticipate that the importance of this service will stay unchanged. Just 4% of the experts believe that it will decrease by 2030.

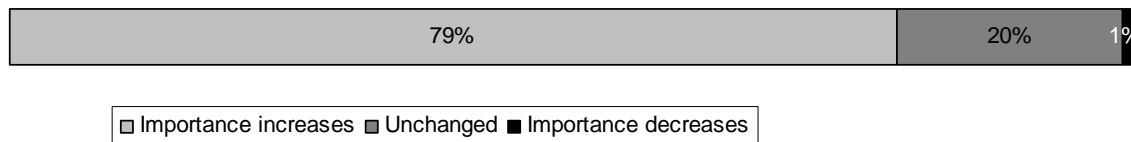
(2) Both, Australian and African (64%) experts believe strongly that the service of privacy zones / lounges will increase by 2030. European experts are a bit more sceptical – but still 51% of them anticipate an increase of this service.

(3) Especially the tourism experts (59%) are strongly convinced, that the importance of this service will increase. 43% of the science and technology experts anticipate an increase.

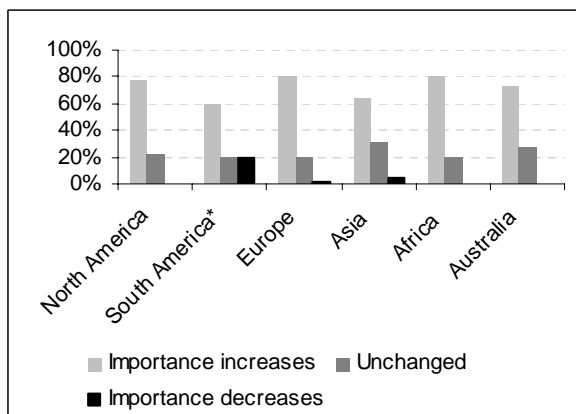
### 2.2.3.7 Services – Dynamic packaging

**Question:** How will the importance of the following services change for clients in your country by 2030? - Dynamic packaging (individual combination of trip components)

(1)



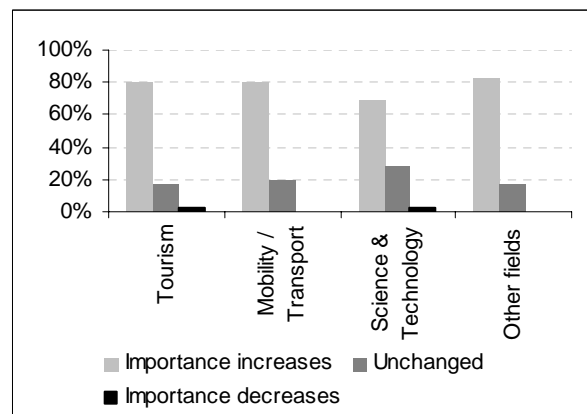
(2) Continent of residence



n = 526

\* less than 10 cases

(3) Interviewees' most important work field



n = 532

(1) Most of the experts (79%) consider that the importance of the service of dynamic packaging (individual combination of trip components) will increase. Just 20% of the experts believe that the importance of this service will stay unchanged.

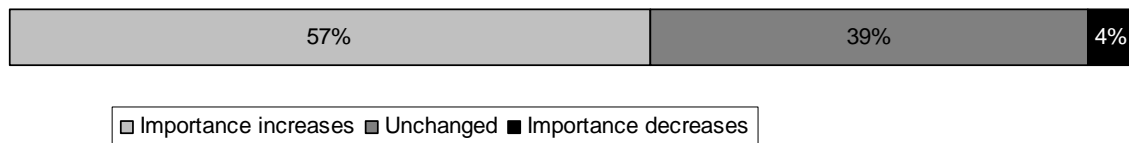
(2) Experts from all continents consider that the importance of this service will increase by 2030 (e.g. 80% of the African, 80% of the European and 77% of the North American experts anticipate an increasing importance). The Asian experts are not fully convinced and, therefore, just 64% of those experts anticipate that the importance of this service will increase by 2030.

(3) 81% of the mobility and transport and 80% of the tourism experts consider that the importance of this service will increase by 2030.

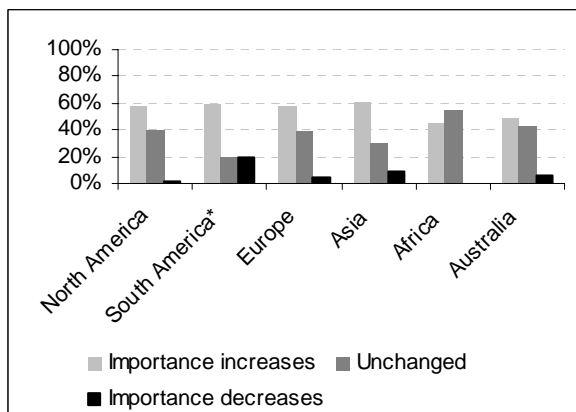
### 2.2.3.8 All-inclusive packages – Free-of-charge shuttle services

**Question:** In the case of all-inclusive packages, how will the importance of the following services change for clients in your country by 2030? - Free-of-charge shuttle services for passengers

(1)



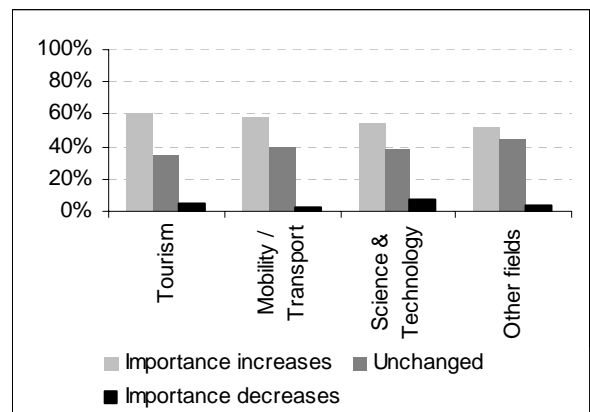
(2) Continent of residence



n = 528

\* less than 10 cases

(3) Interviewees' most important work field



n = 534

(1) The majority of experts (57%) believe that the importance of the service of free-of-charge shuttle service for passengers in the case of all-inclusive packages will increase by 2030. Just 4% of the experts consider that the importance of this service will decrease.

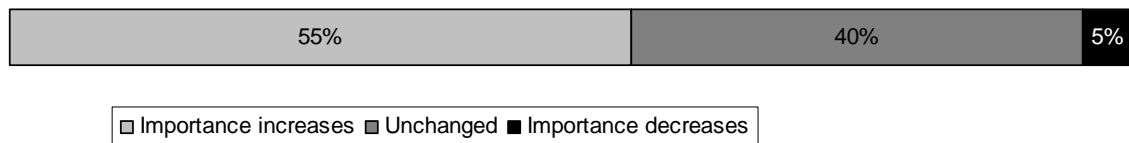
(2) 61% of the Asian and 59% of the North American experts believe that the importance of this service will increase. Just 46% of the African experts anticipate the same.

(3) Experts from the work field tourism (60%) and mobility and transport (58%) believe strongly that the importance of this service will increase by 2030.

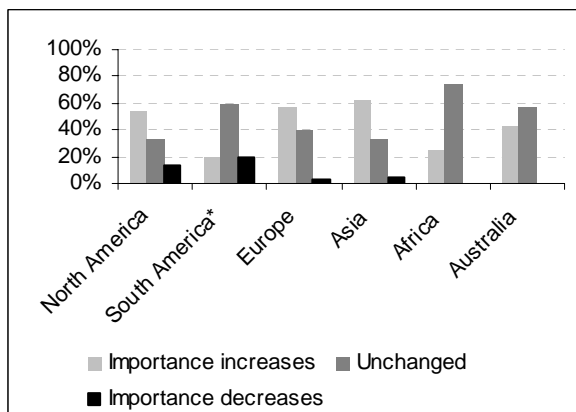
### 2.2.3.9 All-inclusive packages – Free-of-charge luggage service

**Question:** In the case of all-inclusive packages, how will the importance of the following services change for clients in your country by 2030? - Free-of-charge luggage service

(1)



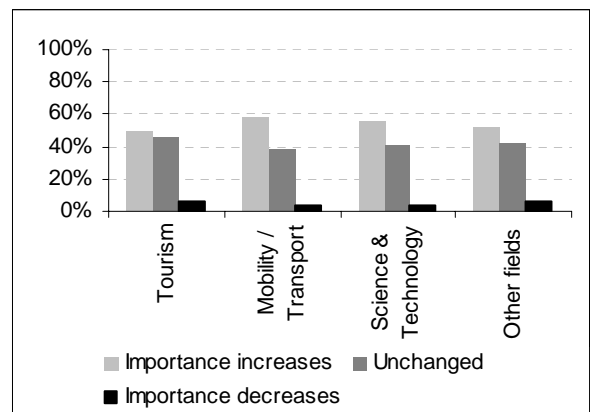
(2) Continent of residence



n = 525

\* less than 10 cases

(3) Interviewees' most important work field



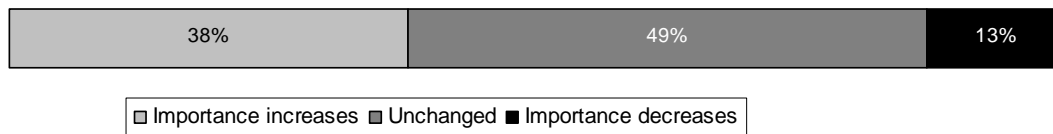
n = 531

- (1) 55% of all experts consider that the importance of the free-of-charge luggage service, in the case of all-inclusive packages, will increase by 2030.
- (2) Experts from Europe (57%) and Asia (63%) believe strongly that the importance of the free-of-charge luggage service will increase by 2030. Just 25% of the African experts anticipate an increase.
- (3) 58% of the mobility and transport experts anticipate that the importance of this service will increase. In comparison only 49% of the tourism experts anticipate the same.

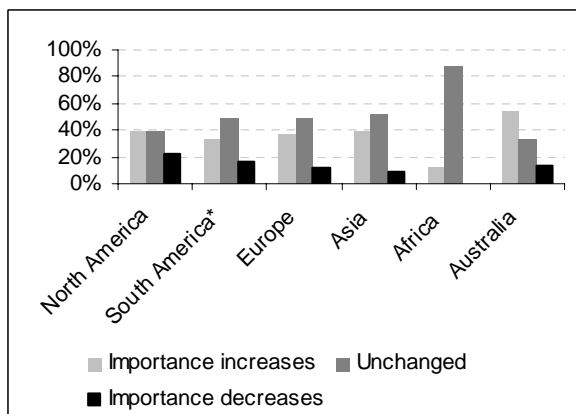
### 2.2.3.10 All-inclusive packages – Free-of-charge use of a car

**Question:** In the case of all-inclusive packages, how will the importance of the following services change for clients in your country by 2030? - Free-of-charge use of a car

(1)



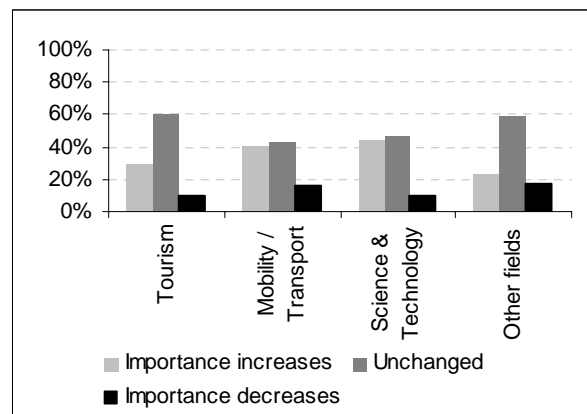
(2) Continent of residence



n = 523

\* less than 10 cases

(3) Interviewees' most important work field



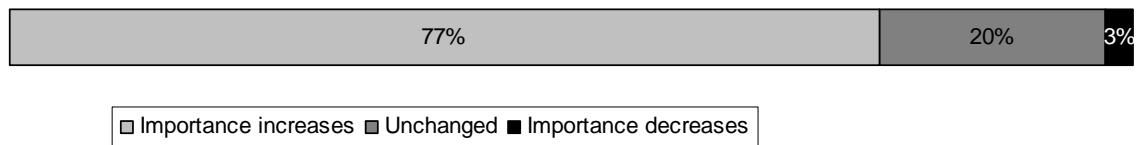
n = 528

- (1) The majority of experts (49%) consider that the importance of using a free-of-charge car will stay unchanged for clients by 2030 (in the case of all-inclusive packages).
- (2) 88% of the African experts consider that the importance of this service will stay unchanged. In comparison just 33% of the Australian experts believe the same.
- (3) Tourism experts (61%) anticipate strongly that the importance of this service will stay unchanged. In comparison only 43% of the mobility and transport experts believe the same.

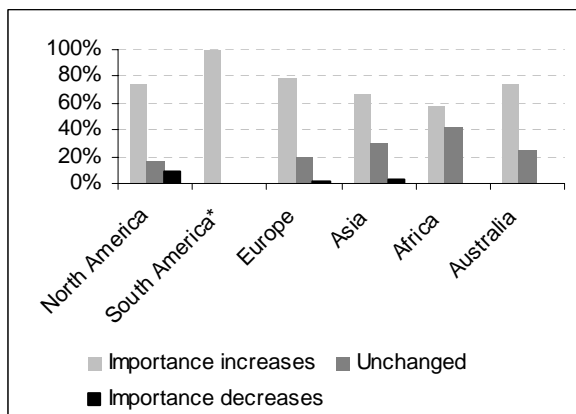
### 2.2.3.11 All-inclusive packages – Free-of-charge use of media

**Question:** In the case of all-inclusive packages, how will the importance of the following services change for clients in your country by 2030? - Free-of-charge use of media (Internet, print media, TV)

(1)



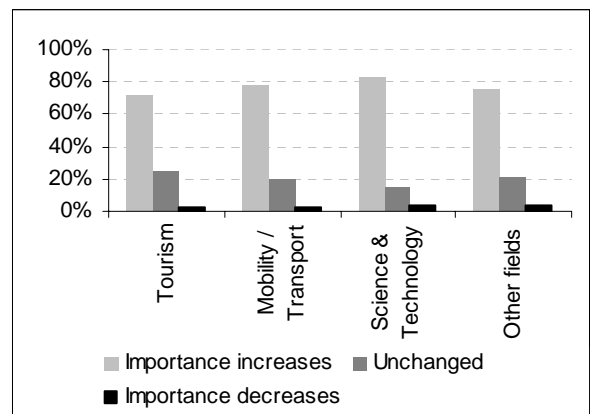
(2) Continent of residence



n = 525

\* less than 10 cases

(3) Interviewees' most important work field



n = 531

(1) The majority of experts (77%) consider that the importance of the service of free-of-charge use of media (Internet, print media, TV) will increase. 20% of the experts believe that the importance of this service will stay unchanged and only 3% anticipate a decrease of importance.

(2) Experts from all continents consider that the importance of this service will increase by 2030. 79% of the European and 75% of the North American experts believe that the importance will increase but, in comparison, just 58% of the African experts anticipate the same.

(3) 82% of the science and technology and 78% of the mobility and transport experts consider that the importance of this service will increase by 2030.

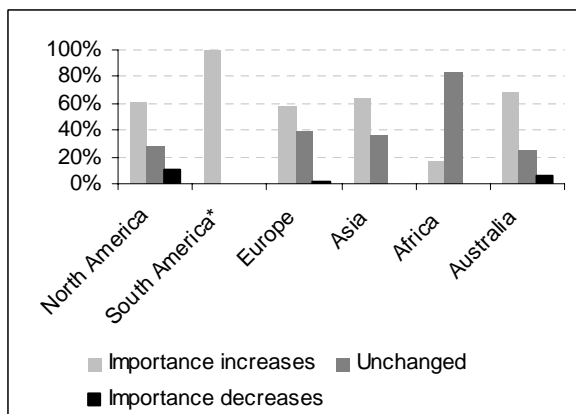
### 2.2.3.12 All-inclusive packages – Stronger security services

**Question:** In the case of all-inclusive packages, how will the importance of the following services change for clients in your country by 2030? - Stronger security services

(1)



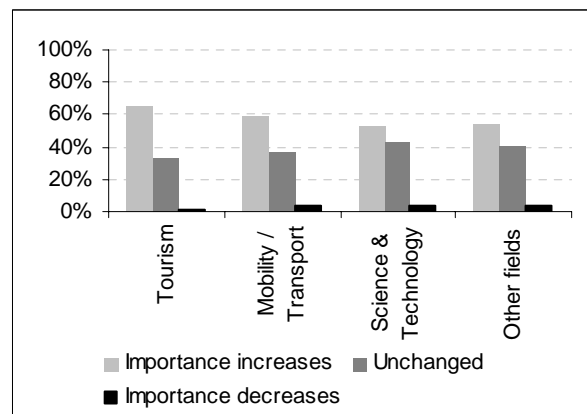
(2) Continent of residence



n = 525

\* less than 10 cases

(3) Interviewees' most important work field



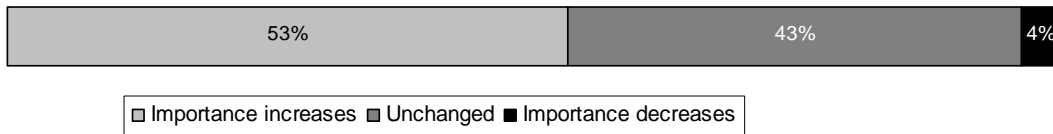
n = 531

- (1) The majority of experts (59%) consider that the importance of stronger security services will increase for clients in their country by 2030.
- (2) The Australian experts (69%) are strongly convinced that the importance of this service will increase by 2030. In comparison just 17% of the African experts believe that this service will increase.
- (3) Experts from all work fields are convinced that the importance of this service will increase (e.g. 66% of the tourism and 60% of the mobility and transport experts).

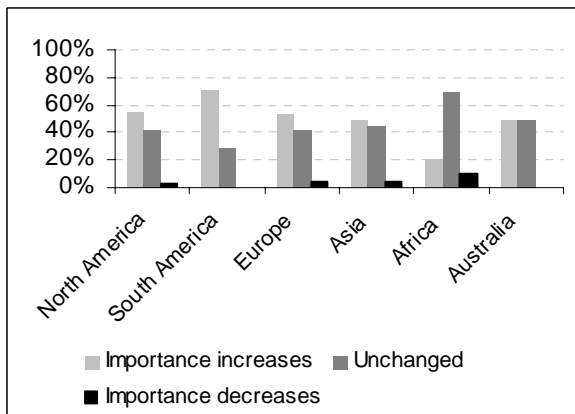
2.2.3.13 All-inclusive packages – Free use of fitness and wellness services

**Question:** In the case of all-inclusive packages, how will the importance of the following services change for clients in your country by 2030? - Free-of-charge use of fitness and wellness services

(1)



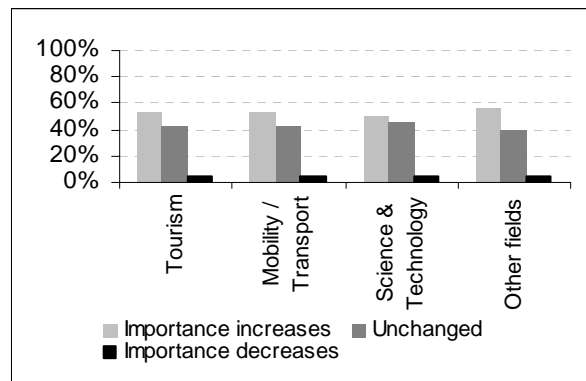
(2) Continent of residence



n = 526

\* less than 10 cases

(3) Interviewees' most important work field



n = 532

(1) 53% of the experts anticipate that the importance of free-of-charge use of fitness and wellness services for clients will increase by 2030. 43% of the experts believe otherwise and consider the importance of this service will stay unchanged.

(2) 55% of the North American and 53% of the European experts consider that the importance of this service will increase by 2030. In comparison just 20% of the African experts believe the same.

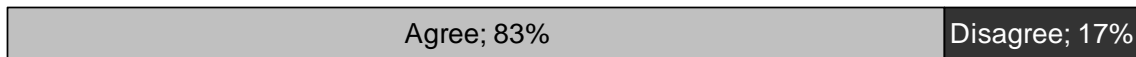
(3) 54% of the tourism and 52% of the mobility and transport experts anticipate that the importance of this service will increase by 2030.



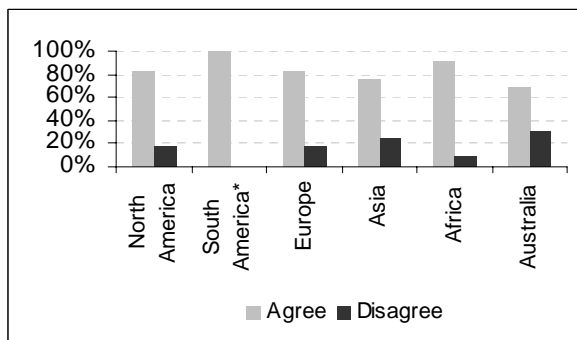
2.2.3.14 Navigation service providers – Payment for company listings

**Question:** By 2030, navigation service providers in your country will require payment for including company listings in their navigation charts.

(1)



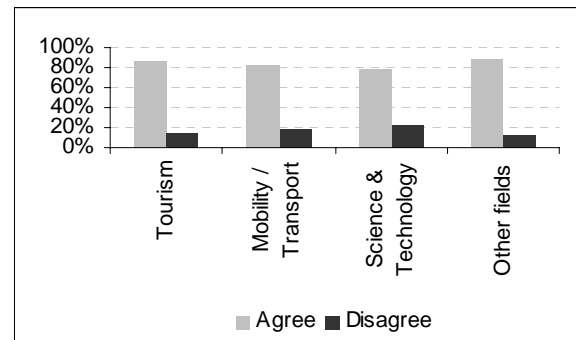
(2) Continent of residence



n = 530

\* less than 10 cases

(3) Interviewees' most important work field



n = 536

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

(2) Experts from all continents strongly agree with this statement (e.g. 91% of the African and 83% of the North American experts agree).

(3) 85% of the tourism and 82% of the mobility and transport experts agree that, by 2030, navigation providers in their country will require payment for including company listings in their navigation charts.

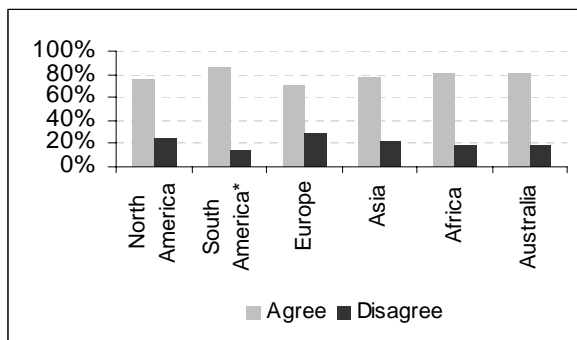
### 2.2.3.15 Change in attractiveness of top destinations

**Question:** By 2030, the attractiveness of many top destinations today will have become overshadowed by other regions around the world.

(1)



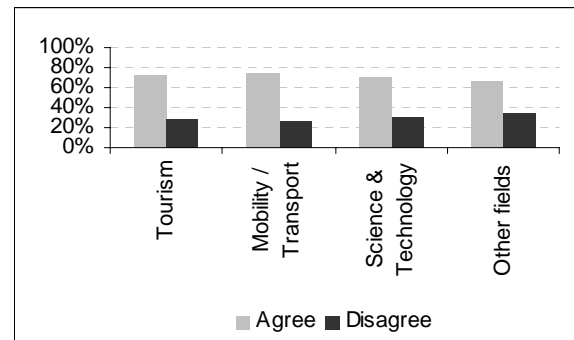
(2) Continent of residence



n = 535

\* less than 10 cases

(3) Interviewees' most important work field



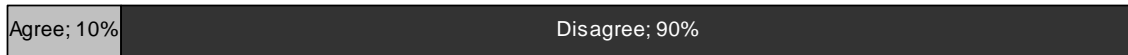
n = 541

- (1) The majority of experts (72%) agree with the statement that, by 2030, the attractiveness of many top destinations today will have become overshadowed by other regions around the world.
- (2) 82% of the African and 81% of the Australian experts agree with this statement. In comparison just 71% of the European experts agree that many top destinations today will have become overshadowed by other regions around the world.
- (3) 74% of the mobility and transport and 71% of the tourism experts agree to this statement.

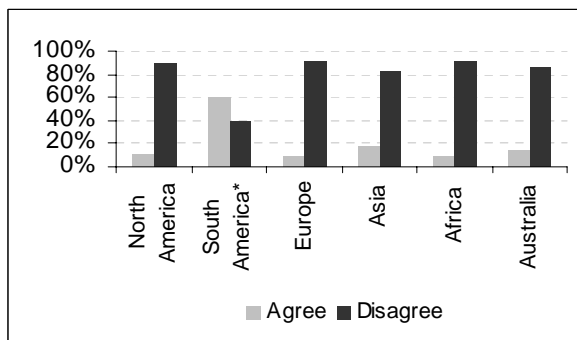
### 2.2.3.16 Frequent user discounts

**Question:** By 2030, frequent-user discounts on trains and airlines will have become illegal due to stricter environmental regulations.

(1)



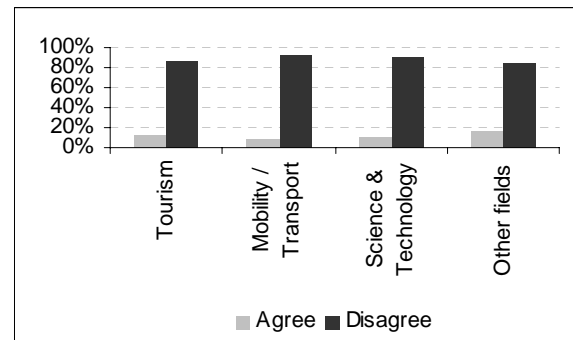
(2) Continent of residence



n = 533

\* less than 10 cases

(3) Interviewees' most important work field



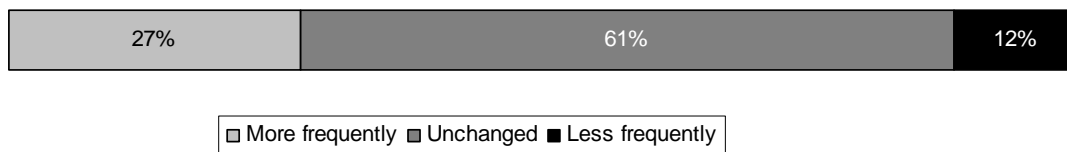
n = 539

- (1) 90% of the experts consider that frequent-user discounts on trains and airlines will *not* be illegal due to stricter environmental regulations by 2030.
- (2) Experts from all continents disagree strongly with the statement that frequent-user discounts on trains and airlines will have become illegal due to stricter environmental regulations by 2030 (e.g. 91% of the European and 90% of the North American experts).
- (3) Experts from all work fields disagree strongly with this statement (e.g. 93% of the mobility and transport and 89% of the science and technology experts).

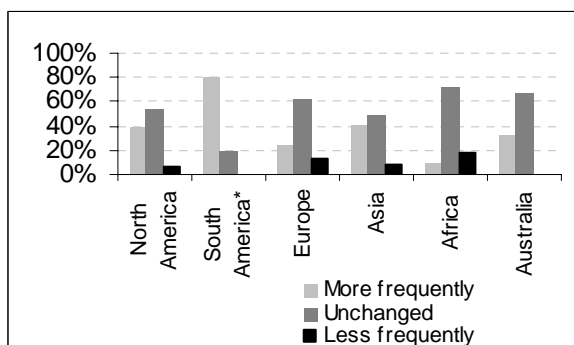
### 2.2.3.17 Destinations – Holiday trips – Ocean

**Question:** By 2030, will people in your country choose the following destinations for holiday trips (more than 4 overnight stays) more frequently or less frequently than they do today? - The ocean

(1)



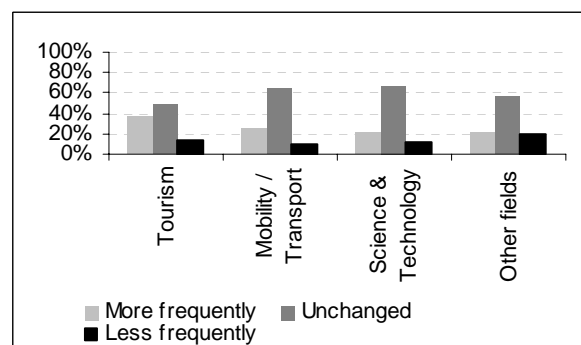
(2) Continent of residence



n = 525

\* less than 10 cases

(3) Interviewees' most important work field



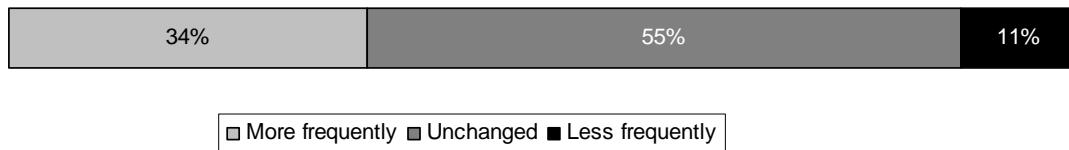
n = 531

- (1) Most of the experts (61%) consider that the demand of holiday trips (more than 4 overnight stays) for the destination *the ocean* will stay unchanged by 2030. Just 27% of the experts believe that people of their country will chose this destination more frequently.
- (2) 73% of the African and 67% of the Australian experts consider that the demand for the destination *the ocean* will stay unchanged by 2030. In comparison, only 50% of the Asian experts believe the same. 42% of those experts anticipate that people of their country will chose *the ocean* more frequently.
- (3) 67% of the science and technology experts consider that the demand for this destination will stay unchanged by 2030. In comparison just 49% of the tourism experts believe the same. The tourism experts (37%) anticipate quite strongly that the destination *the ocean* will be chosen more frequently.

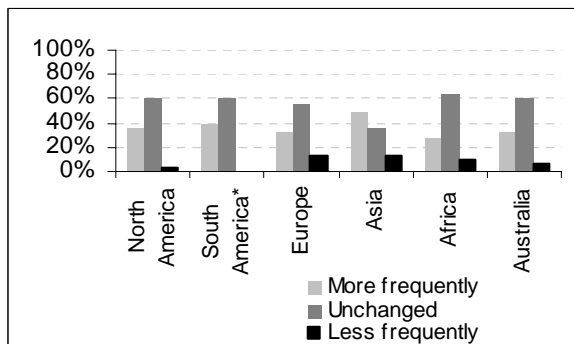
### 2.2.3.18 Destinations – Holiday trips – Mountains

**Question:** By 2030, will people in your country choose the following destinations for holiday trips (more than 4 overnight stays) more frequently or less frequently than they do today? Mountains

(1)



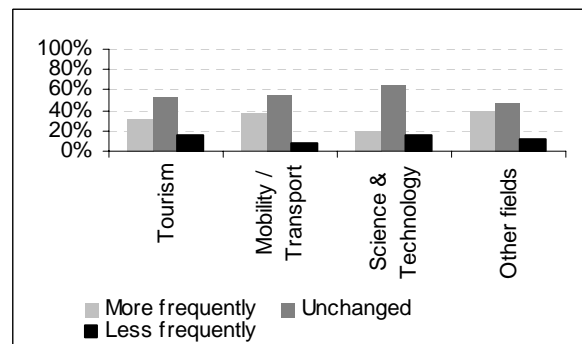
(2) Continent of residence



n = 528

\* less than 10 cases

(3) Interviewees' most important work field



n = 534

(1) 55% of the experts believe that the demand for the destination *mountains* for holiday trips (more than 4 overnight stays) will stay unchanged by 2030.

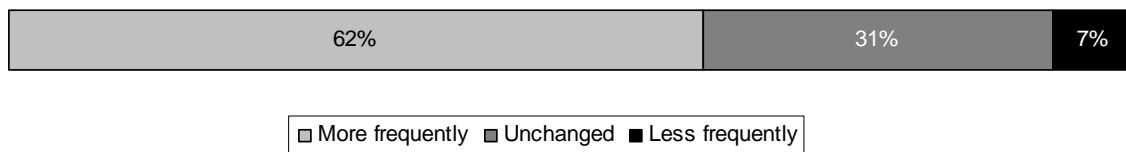
(2) 64% of the African experts consider that the demand for the destination *mountains* will stay unchanged. In comparison just 36% of the Asian believe the same (50% of the Asian experts anticipate that people of their country will chose *mountains* more frequently by 2030).

(3) Experts from all work fields consider that the demand for the destination *mountains* from people of their country will stay unchanged (e.g. 65% of the science and technology and 54% of the tourism experts).

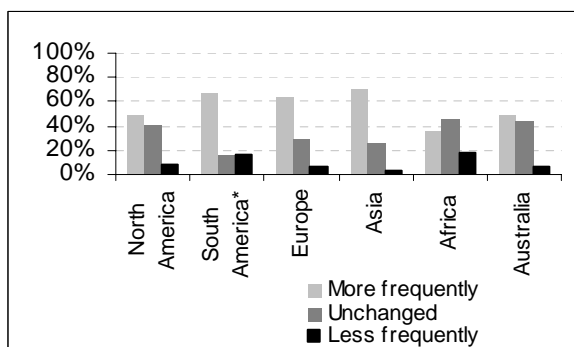
### 2.2.3.19 Destinations – Holiday trips – Regional

**Question:** By 2030, will people in your country choose the following destinations for holiday trips (more than 4 overnight stays) more frequently or less frequently than they do today? - Altogether: regional destinations

(1)



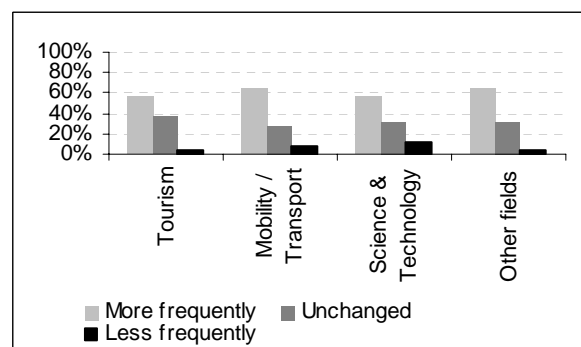
(2) Continent of residence



n = 525

\* less than 10 cases

(3) Interviewees' most important work field



n = 531

(1) The majority of experts (62%) believe that, by 2030, people in their country will chose *regional destinations* for holiday trips (more than 4 overnight stays) more frequently than they do today. 31% of the experts believe that it will stay unchanged and just 7% anticipate that people in their country will choose *regional destinations* for holiday trips less frequently by 2030.

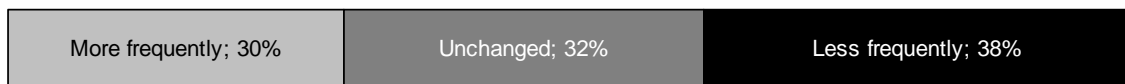
(2) 70% of the Asian experts consider that people in their country will chose *regional destinations* more frequently than they do today. In comparison only 36% of the African experts anticipate the same.

(3) 65% of the mobility and transport experts consider that people of their country will chose *regional destinations* by 2030 more frequently than they do today.

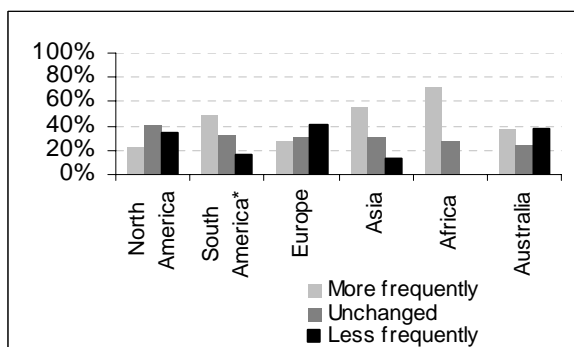
### 2.2.3.20 Destinations – Holiday trips – Long-haul

**Question:** By 2030, will people in your country choose the following destinations for holiday trips (more than 4 overnight stays) more frequently or less frequently than they do today? - Altogether: Long-haul destinations

(1)



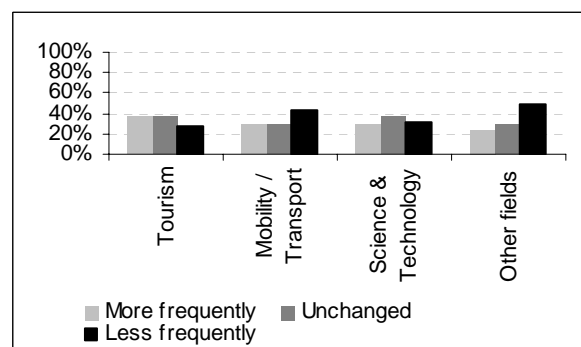
(2) Continent of residence



n = 528

\* less than 10 cases

(3) Interviewees' most important work field



n = 534

(1) The experts answered this question fairly well-balanced. 38% of the experts consider that people of their country will chose *long-haul destinations* less frequently than they do today. 30% of the experts consider that people will chose those destinations more frequently.

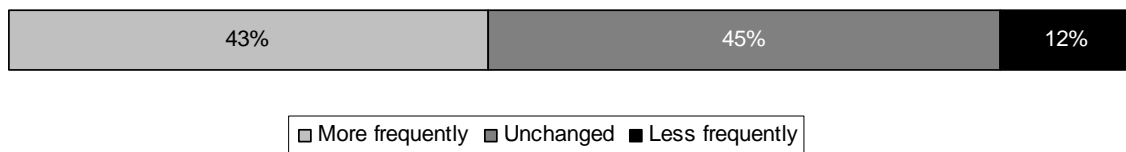
(2) 73% of the African experts consider that people of their country will chose *long-haul destinations* more frequently than they do today. In comparison just 24% of the North American experts believe the same.

(3) 42% of the mobility and transport experts believe that the *long-haul destination* will be chosen less frequently. Just 27% of the tourism experts consider the same.

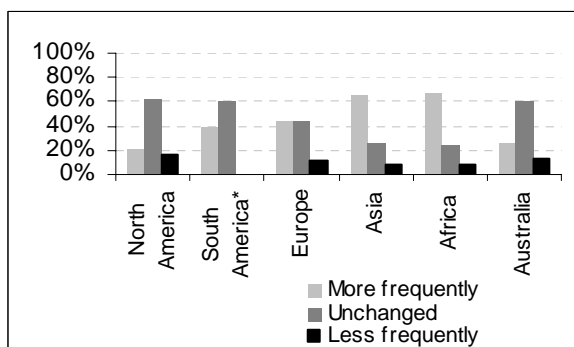
### 2.2.3.21 Destinations – Holiday trips – Major cities, conurbations

**Question:** By 2030, will people in your country choose the following destinations for holiday trips (more than 4 overnight stays) more frequently or less frequently than they do today? - Major cities, conurbations

(1)



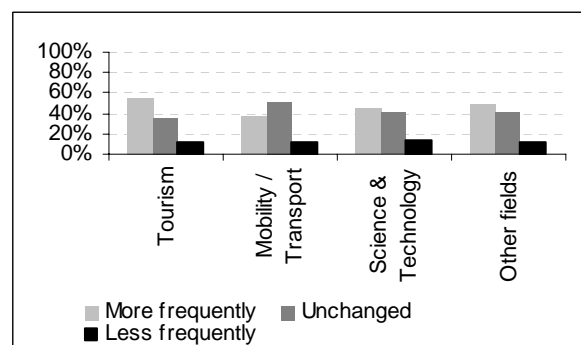
(2) Continent of residence



n = 528

\* less than 10 cases

(3) Interviewees' most important work field



n = 534

(1) Experts tend slightly (45%) to the consideration that the demand from people of their country for destinations like *major cities, conurbations* will stay unchanged by 2030. 43% of the experts anticipate that people of their country will chose those destinations more frequently than they do today.

(2) African experts (67%) anticipate that people of their country will chose *major cities, conurbations* more frequently as a holiday trip (more than 4 overnight stays) destination. Just 21% of the North American experts believe the same than the African experts.

(3) 55% of the tourism experts believe that people of their country will chose those destinations more frequently.



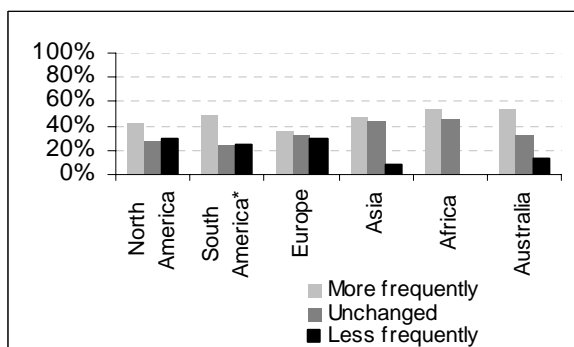
### 2.2.3.22 Destinations – Holiday trips – Africa

**Question:** By 2030, will people in your country choose the following destinations for holiday trips (more than 4 overnight stays) more frequently or less frequently than they do today? - Africa

(1)



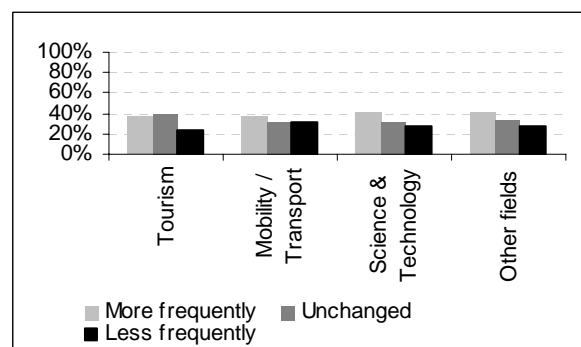
(2) Continent of residence



n = 528

\* less than 10 cases

(3) Interviewees' most important work field



n = 534

(1) 39% of the experts consider that people of their country will choose *Africa* more frequently for holiday trips by 2030. It has to be said, that the answers to this question are well-balanced (34% unchanged and 28% less frequently).

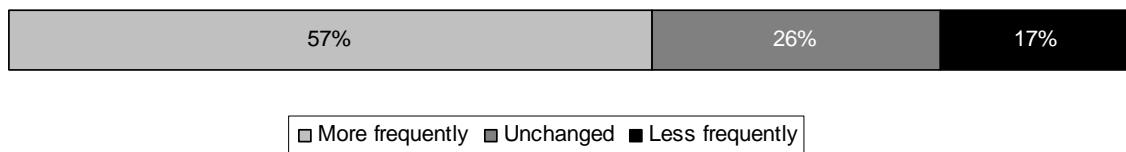
(2) 53% of the Australian and 37% of the European experts answered this question with “more frequently”.

(3) 42% of the science and technology and 38% of the tourism experts anticipate that people of their country will chose *Africa* more frequently for holiday trips than they do today.

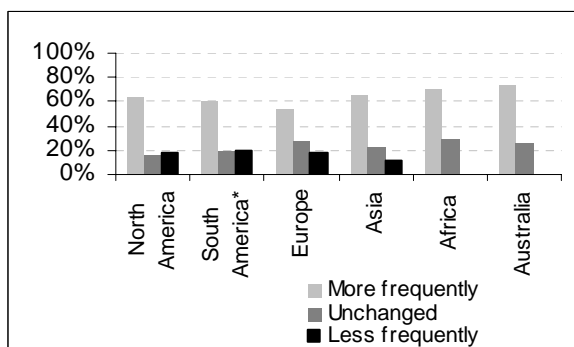
### 2.2.3.23 Destinations – Holiday trips – Asia

**Question:** By 2030, will people in your country choose the following destinations for holiday trips (more than 4 overnight stays) more frequently or less frequently than they do today? - Asia

(1)



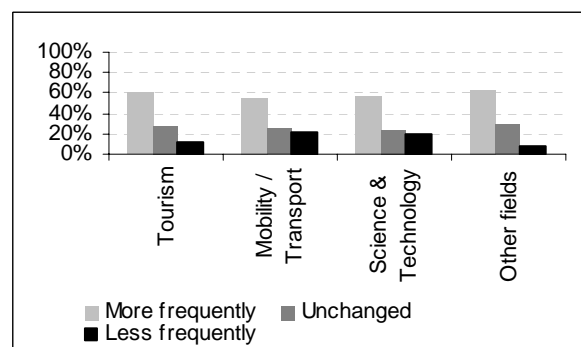
(2) Continent of residence



n = 529

\* less than 10 cases

(3) Interviewees' most important work field



n = 535

The majority of experts (57%) believe that, by 2030, people in their country will (1) choose *Asia* for holiday trips (more than 4 overnight stays) more frequently than they do today. 26% of the experts believe that it will stay unchanged and 17% anticipate that people in their country will choose *Asia* for holiday trips less frequently by 2030.

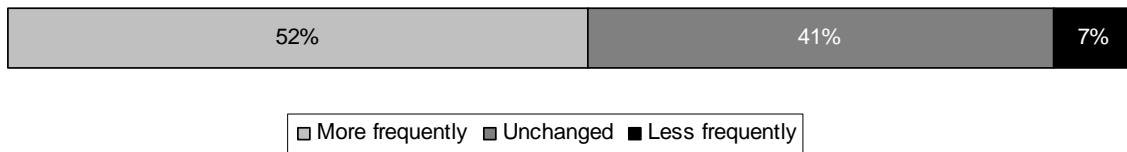
(2) 73% of the Australian, 70% of the African and 65% of the Asian experts believe that people will choose *Asia* more frequently. In comparison, just 55% of the European experts anticipate that people will choose *Asia* more frequently for holiday trips.

(3) 61% of the tourism and 58% of the science and technology experts anticipate that people of their country will choose, by 2030, *Asia* more frequently for holiday trips.

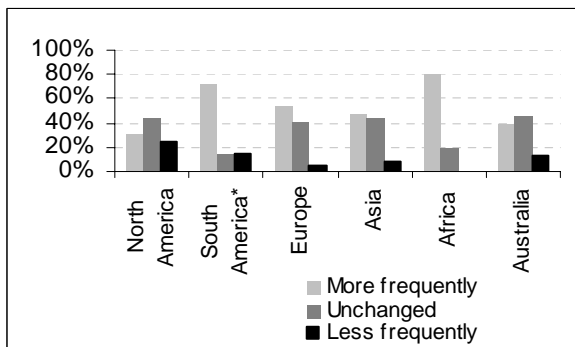
2.2.3.24 Destinations – Holiday trips – Europe

**Question:** By 2030, will people in your country choose the following destinations for holiday trips (more than 4 overnight stays) more frequently or less frequently than they do today? - Europe

(1)



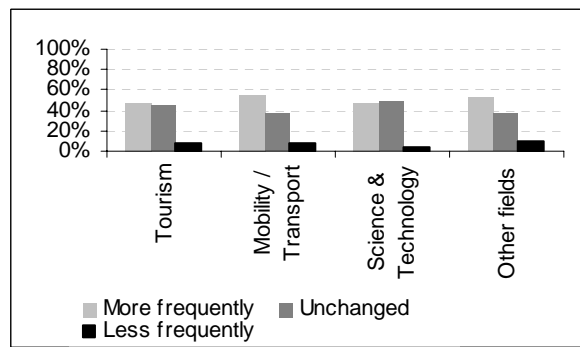
(2) Continent of residence



n = 526

\* less than 10 cases

(3) Interviewees' most important work field



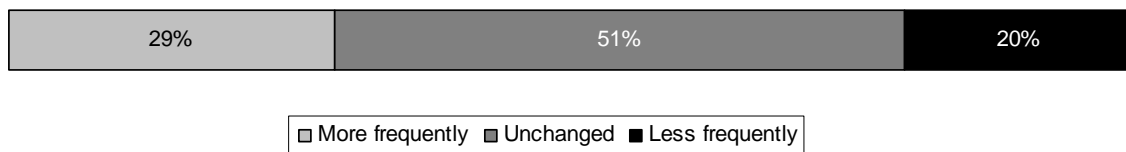
n = 532

- (1) The majority of experts (52%) believe that, by 2030, people in their country will choose *Europe* for holiday trips (more than 4 overnight stays) more frequently than they do today.
- (2) 80% of the African experts consider that the people of their country will choose *Europe* more frequently as a holiday trip destination by 2030. In comparison just 31% of the North American experts believe the same.
- (3) The majority of mobility and transport (56%) experts answered this question with "more frequently".

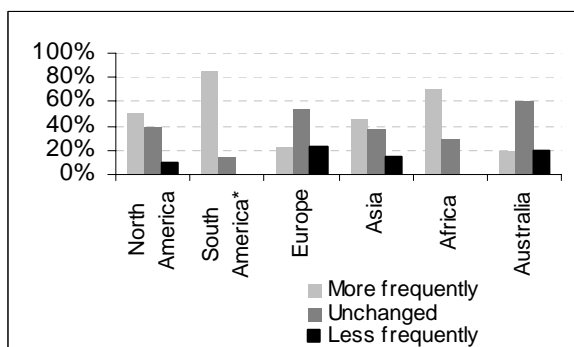
### 2.2.3.25 Destinations – Holiday trips – North America

**Question:** By 2030, will people in your country choose the following destinations for holiday trips (more than 4 overnight stays) more frequently or less frequently than they do today? - North America

(1)



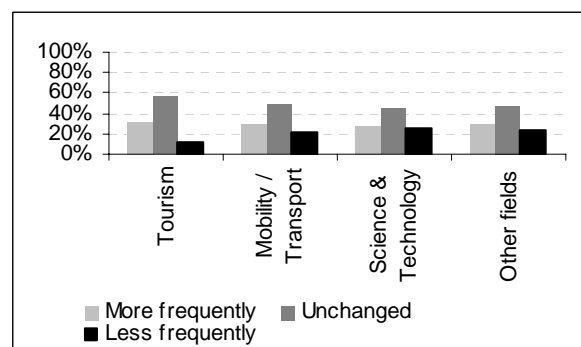
(2) Continent of residence



n = 527

\* less than 10 cases

(3) Interviewees' most important work field



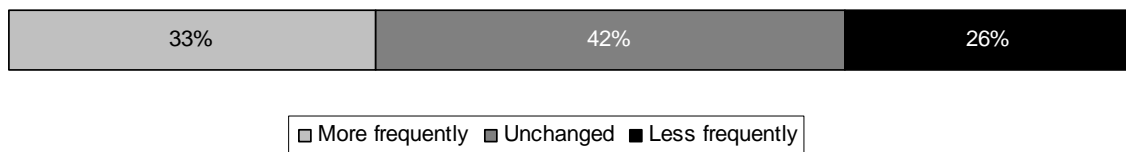
n = 533

- (1) 51% of the experts believe that the holiday travel demand for *North America* for holiday trips (more than 4 overnight stays) will not change.
- (2) 60% of the Australian and 54% of the European experts think that the holiday travel demand for *North America* for holiday trips (more than 4 overnight stays) will not change.
- (3) The majority of tourism experts (57%) think that the holiday travel demand for the destination *North America* will not change.

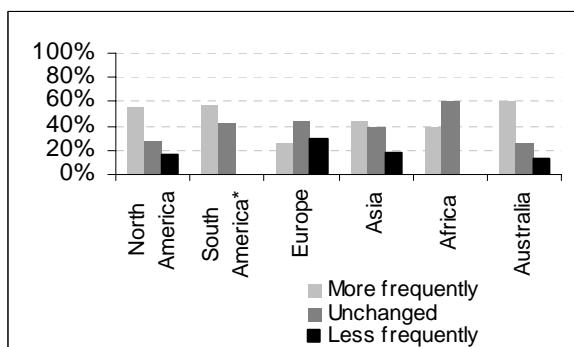
### 2.2.3.26 Destinations – Holiday trips – South America

**Question:** By 2030, will people in your country choose the following destinations for holiday trips (more than 4 overnight stays) more frequently or less frequently than they do today? - South America

(1)



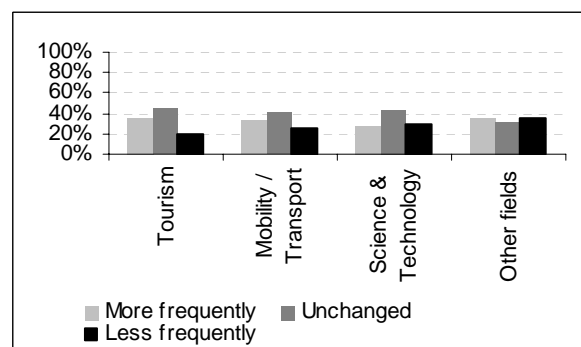
(2) Continent of residence



n = 527

\* less than 10 cases

(3) Interviewees' most important work field



n = 533

(1) 42% of the experts believe that the demand from people in their country for the destination *South America* will remain unchanged by 2030.

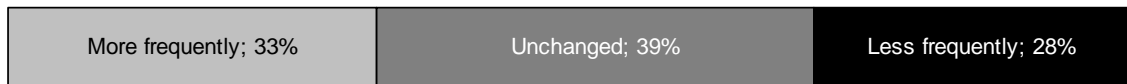
(2) The majority of African experts (60%) consider that the demand for *South America* will remain unchanged. 28% of the North American experts think the same.

(3) 46% of the tourism experts anticipate that the demand for *South America* will remain unchanged.

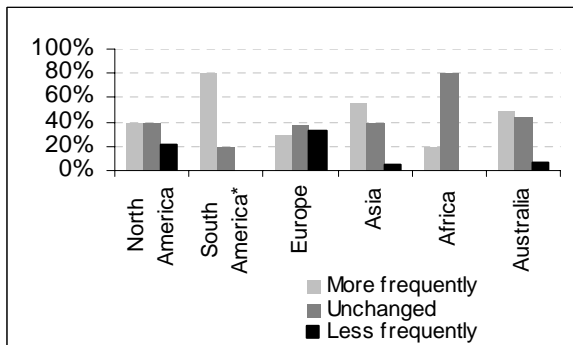
2.2.3.27 Destinations – Holiday trips – Oceania, Australia

**Question:** By 2030, will people in your country choose the following destinations for holiday trips (more than 4 overnight stays) more frequently or less frequently than they do today? – Oceania, Australia

(1)



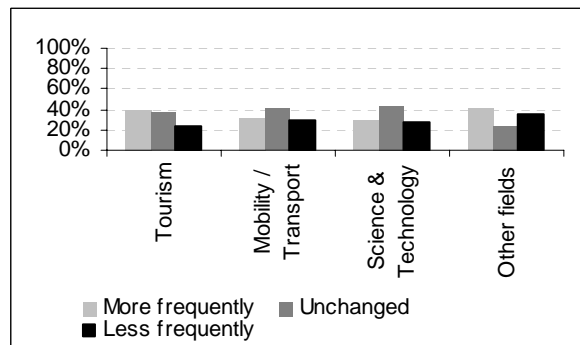
(2) Continent of residence



n = 527

\* less than 10 cases

(3) Interviewees' most important work field



n = 533

(1) Experts are divided over this matter. There is no clear picture.

(2) Experts from most continents appear divided over this matter. 80% of the African experts see an unchanged situation.

(3) Experts from all work fields appear divided over this matter.

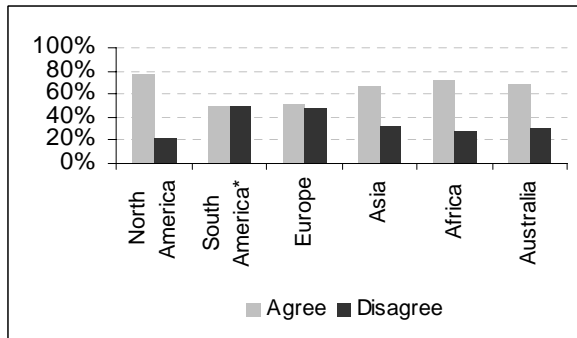
### 2.2.3.28 Public transport – Infrastructure development

**Question:** By 2030, rail service in your country will have largely shifted away from rural regions and instead be concentrated primarily on the densely populated regions and transit corridors.

(1)



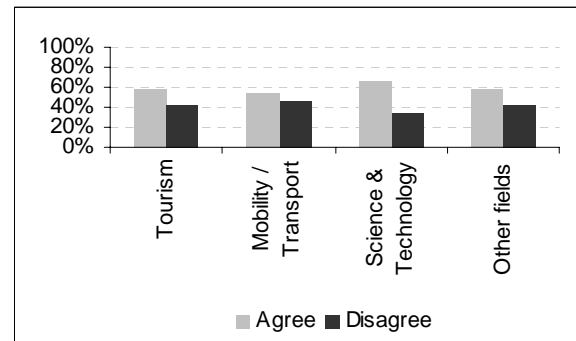
(2) Continent of residence



n = 540

\* less than 10 cases

(3) Interviewees' most important work field



n = 546

(1) A majority (57%) of experts agree.

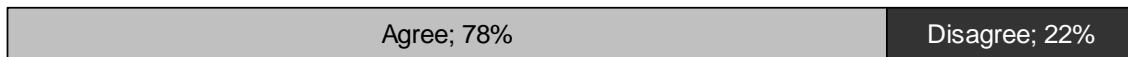
(2) North American experts agree most often (78%). Only 53% of European experts agree.

(3) Science and technology experts agree more often (66%) than experts from other work fields.

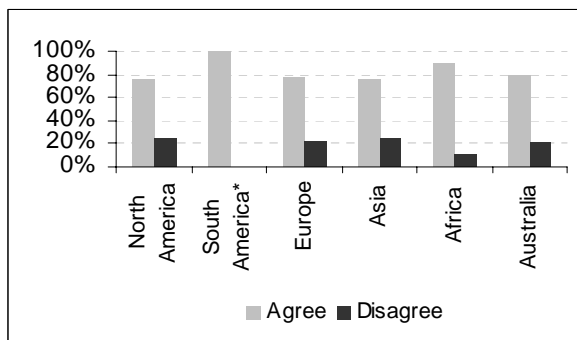
### 2.2.3.29 Hospitality industry – Importance of public transportation

**Question:** The hospitality industry in your country has generally been underestimating the importance of "good connections to public transportation" as a criterion used by guests when choosing a hotel.

(1)



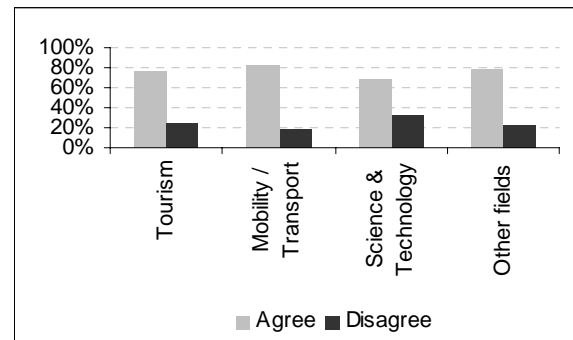
(2) Continent of residence



n = 540

\* less than 10 cases

(3) Interviewees' most important work field



n = 546

(1) The majority of experts (78%) agree with the statement that the hospitality industry in their country has generally been underestimating the importance of "good connections to public transportation" as a criterion used by guests when choosing a hotel.

(2) 89% of the African, 80% of the Australian and 78% of the European experts agree with this statement.

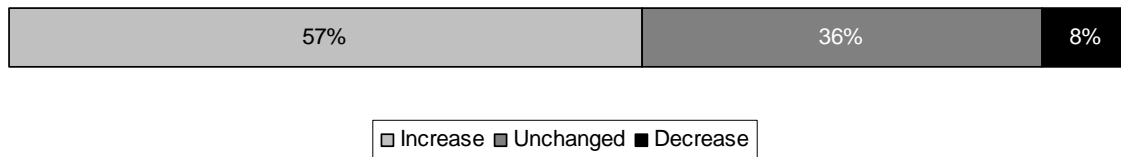
(3) 82% of the mobility and transport and 76% of the tourism experts agree that the hospitality industry in their country has generally been underestimating the importance of "good connections to public transportation" as a criterion used by guests when choosing a hotel. In comparison only 68% of the science and technology experts agree with this statement.



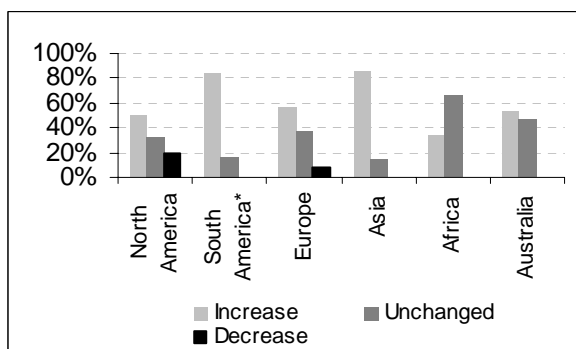
### 2.2.3.30 Travel demand – Private 1-day excursions

**Question:** In general, how do you think travel demand in your country will have changed by 2030? – Private excursions

(1)



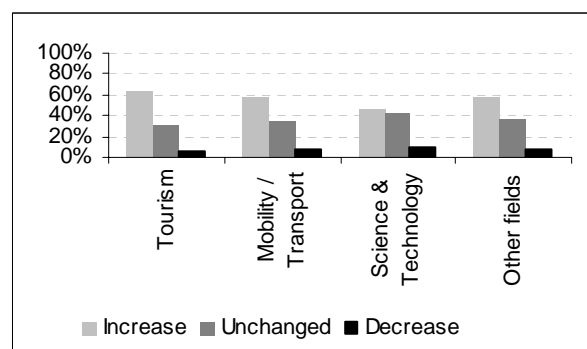
(2) Continent of residence



n = 533

\* less than 10 cases

(3) Interviewees' most important work field



n = 539

(1) A majority of experts think that 1-day private excursions will increase.

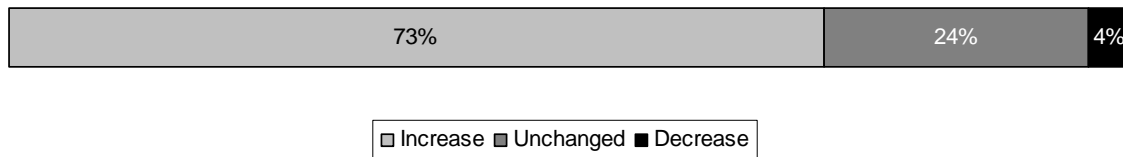
(2) 85% of the Asian experts expect an increase. European and African experts such an increase significantly less often (56%; 33%).

(3) There are only minor differences between tourism and mobility / transport experts regarding this matter. Both groups agree (63%; 58%).

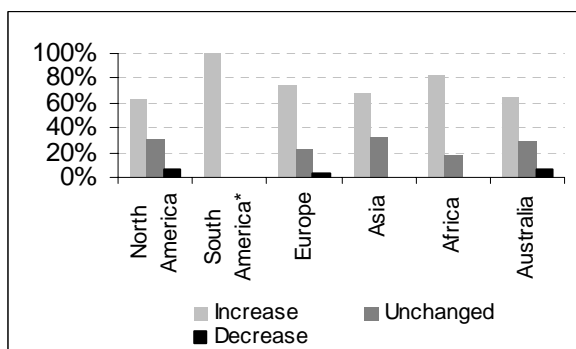
### 2.2.3.31 Travel demand – Private short trips (1 to 3 overnight stays)

**Question:** In general, how do you think travel demand in your country will have changed by 2030? – Private short trips (1 to 3 overnight stays)

(1)



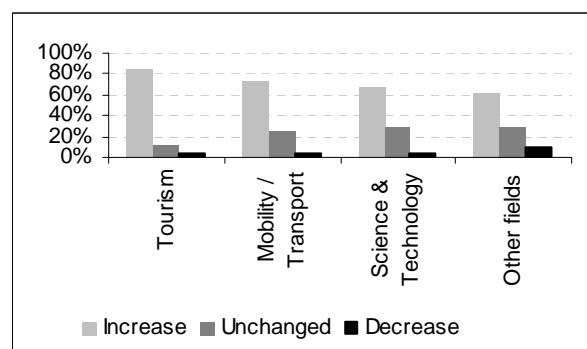
(2) Continent of residence



n = 534

\* less than 10 cases

(3) Interviewees' most important work field



n = 540

(1) The majority of experts (73%) anticipate that travel demand for private short trips (1 to 3 overnight stays) in their country will increase by 2030. 24% of the experts believe that the demand will stay unchanged and just 4% anticipate that the demand will decrease.

(2) Experts from all continents believe that the travel demand for private short trips in their country will increase. 82% of the African and 74% of the European experts believe that the demand will increase but, in comparison, just 63% of the North American experts anticipate an increase.

(3) 85% of the tourism and 72% of the mobility and transport experts consider that the demand for private short trips will increase by 2030.

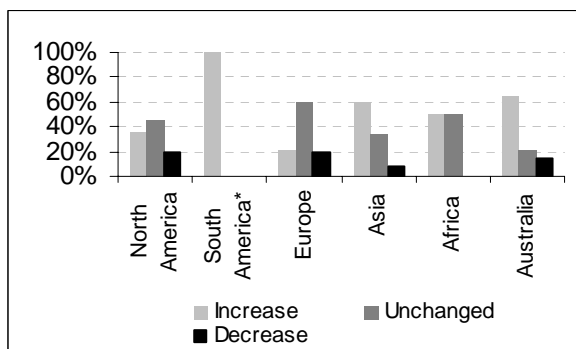
2.2.3.32 Travel demand – Private short trips (4 or more overnight stays)

**Question:** In general, how do you think travel demand in your country will have changed by 2030? – Holiday trips (4 or more overnight stays)

(1)



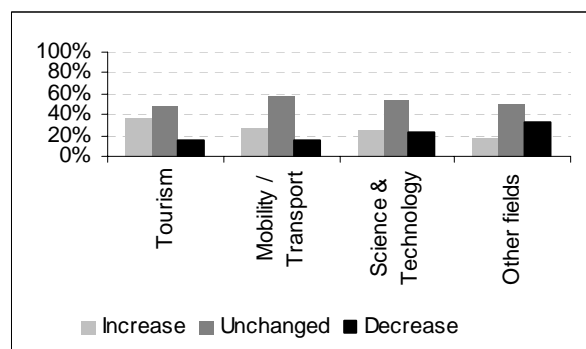
(2) Continent of residence



n = 533

\* less than 10 cases

(3) Interviewees' most important work field



n = 539

(1) Most experts (55%) think the travel demand (holiday trips with 4 or more overnight stays) will stagnate.

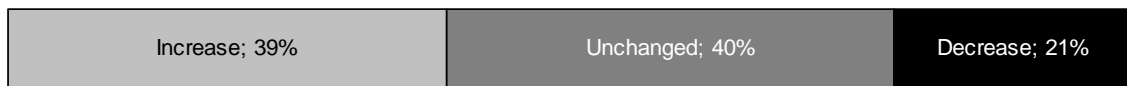
(2) Experts from Australia (64%) and Asia (59%) expect an increase, North American and European experts expect stagnation.

(3)

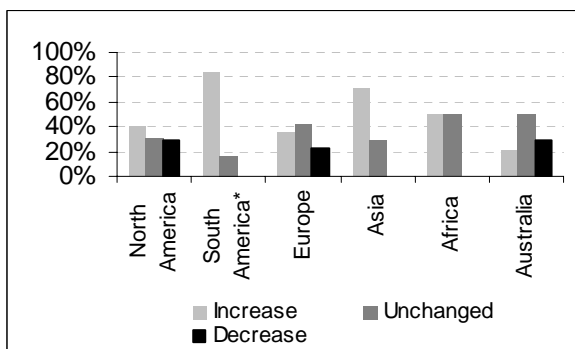
### 2.2.3.33 Travel demand – Business trips (1 day)

**Question:** In general, how do you think travel demand in your country will have changed by 2030? – One-day business trips

(1)



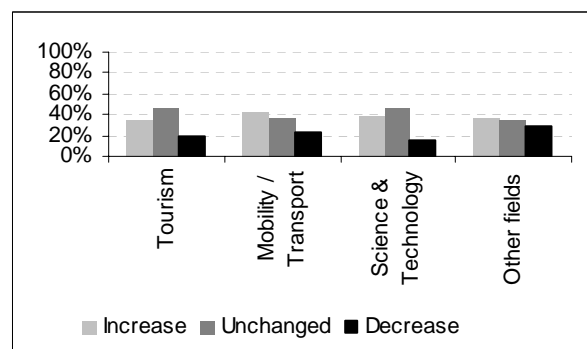
(2) Continent of residence



n = 534

\* less than 10 cases

(3) Interviewees' most important work field



n = 540

(1) Most experts (40%) expect stagnation.

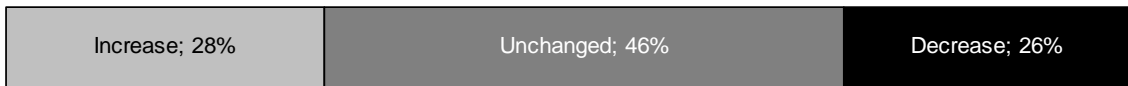
(2) Asian experts (70%) expect an increase.

(3) Tourism experts (47%) expect stagnation.

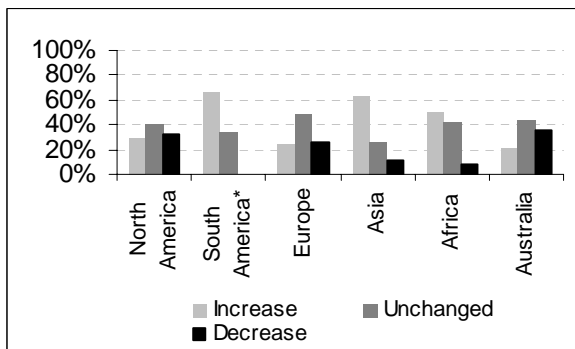
2.2.3.34 Travel demand – Business trips (1 to 3 overnight stays)

**Question:** In general, how do you think travel demand in your country will have changed by 2030? – Short business trips (1 to 3 overnight stays)

(1)



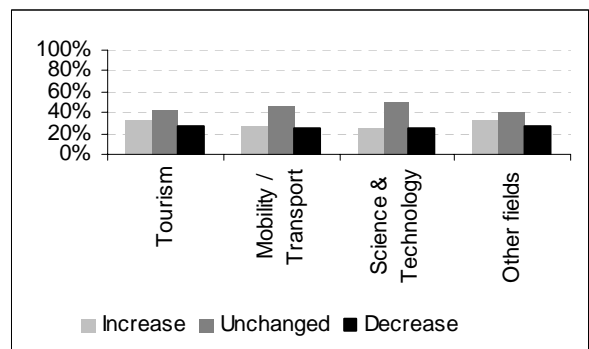
(2) Continent of residence



n = 533

\* less than 10 cases

(3) Interviewees' most important work field



n = 539

(1) Most experts (46%) expect stagnation.

(2) Asian experts (63%) expect an increase.

(3) All experts from all work fields most often expect stagnation.

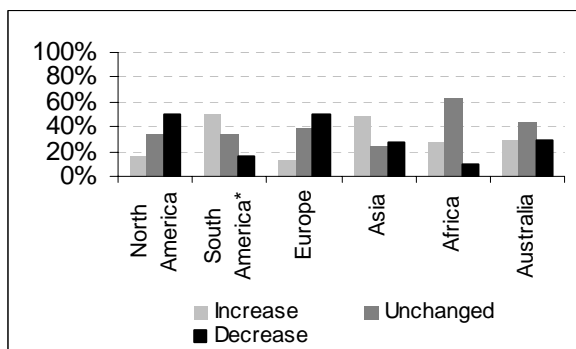
### 2.2.3.35 Travel demand – Business trips (4 or more overnight stays)

**Question:** In general, how do you think travel demand in your country will have changed by 2030? – Business trips (4 or more overnight stays)

(1)



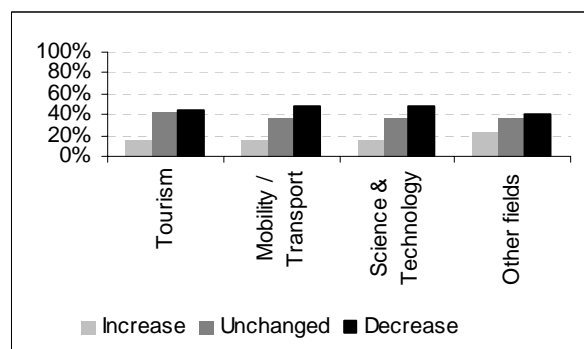
(2) Continent of residence



n = 533

\* less than 10 cases

(3) Interviewees' most important work field



n = 538

(1) 47% of the experts anticipate that travel demand for business trips (4 or more overnight stays) in their country will decrease by 2030. 38% of the experts believe that the demand will stay unchanged and just 16% anticipate that the demand will increase.

(2) 50% of the North American and 49% of the European experts believe that the demand will decrease but, in comparison, just 28% of the Asian and 9% of the African experts anticipate a decrease.

(3) 48% of the mobility and transport and 48% of the science and technology experts consider that the demand for business trips will decrease by 2030.

## 2.3 Transportation Systems

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

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

### 2.3.1 Key findings

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

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

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

*Details → page 108.*

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

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

*Details → page 112.*

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

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

*Details → page 96.*

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

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

*Details → page 97.*

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

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

*Details → page 101.*

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

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

*Details → page 96.*

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

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

*Details → pages 106 and 105.*

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

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

*Details → page 111.*

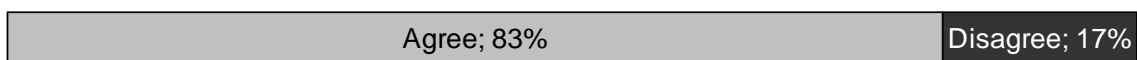


## 2.3.2 Fact sheets

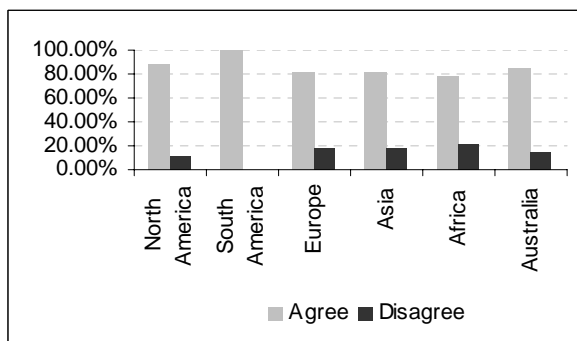
### 2.3.2.1 Private car – leisure trips

**Question:** By 2030, people in your country will regard having their own car for leisure trips as very important.

(1)

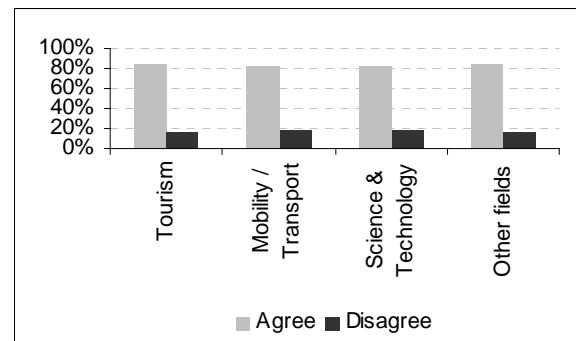


(2) Continent of residence



n = 929

(3) Interviewees' most important work field



n = 944

(1) A vast majority of experts (83%) agree that people in their respective countries will regard having their own car for leisure trips as very important by 2030.

(2) A vast majority of experts from all continents agree. South American experts agree by 100%.

(3) A vast majority of experts agree, regardless their working field.

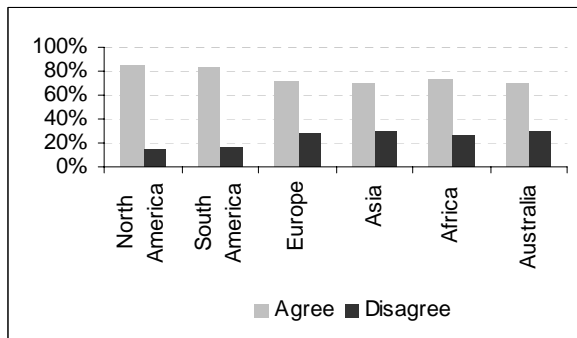
### 2.3.2.2 Private car – suburban travel

**Question:** By 2030, the private car will be the most widely used means of transportation for reaching places on the outskirts of cities and in the suburbs.

(1)

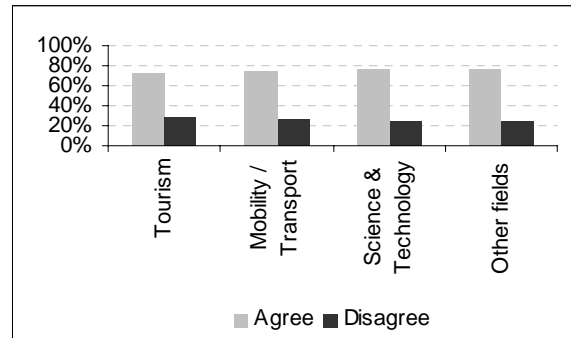


(2) Continent of residence



n = 928

(3) Interviewees' most important work field



n = 943

(1) The majority of experts (74%) agree the private car will be the most widely used means of transportation for reaching places on the outskirts of cities and in the suburbs.

(2) The majority of experts from all continents agree. American experts agree the most (North- 85%; South America 84%).

(3) The majority of experts agree, regardless their working field.

### 2.3.2.3 Taxis in urban areas

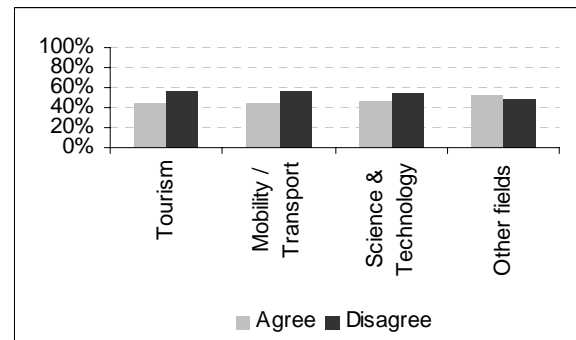
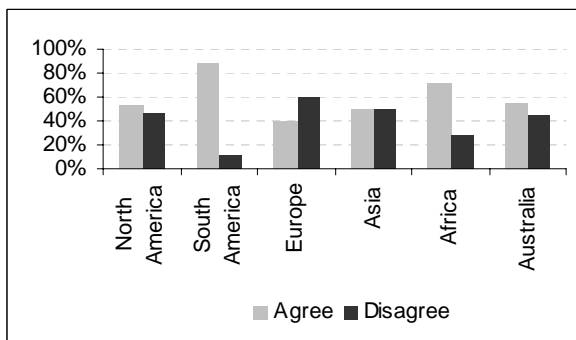
**Question:** The use of taxis for individual transport in your country's urban areas will increase significantly by 2030.

(1)



(2) Continent of residence

(3) Interviewees' most important work field



n = 926

n = 944

(1) A slight majority of experts (55%) disagree that the use of taxis for individual transport in urban areas will increase significantly by 2030.

(2) Experts from South America (88%) and Africa (72%) strongly agree that the use of taxis for individual transport in urban areas will increase significantly by 2030. Europe is the only continent where experts disagree (60%).

(3) A majority of experts in all work fields disagree – with the exception of the group of experts “from other fields”.

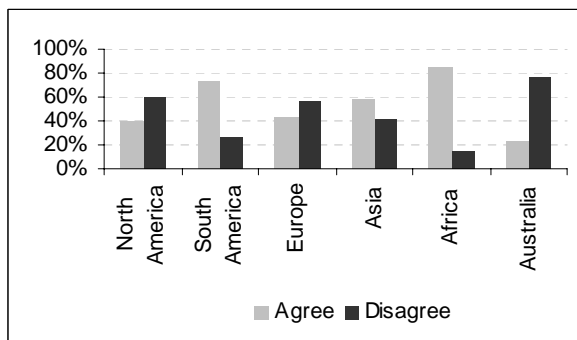
### 2.3.2.4 Car sharing versus commercial car rental

**Question:** By 2030, commercial car-rental companies will have displaced car-sharing services in your country.

(1)

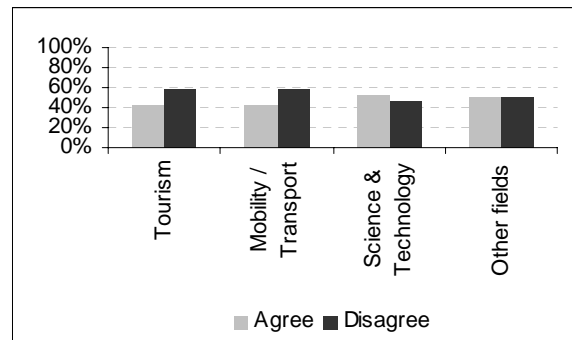


(2) Continent of residence



n = 926

(3) Interviewees' most important work field



n = 941

- (1) A slight majority of experts (55%) disagree that commercial car-rental companies will have displaced car-sharing services in their respective countries by 2030.
- (2) South American (73%) and Asian experts (59%) agree with the statement that car-sharing services will be displaced commercial car-rental companies.
- (3) Experts in science and technology tend to agree (53%) with the statement – while tourism experts tend to disagree (58%).

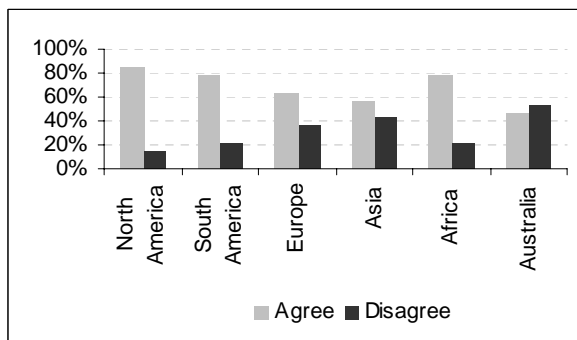
### 2.3.2.5 Funds for road infrastructure maintenance

**Question:** By 2030, road infrastructure maintenance (highways, bridges, etc.) in your country will be seriously underfunded.

(1)

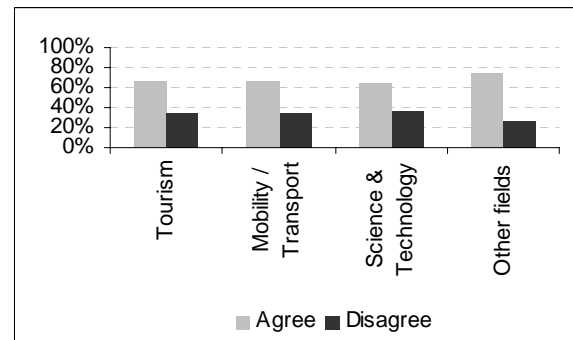


(2) Continent of residence



n = 929

(3) Interviewees' most important work field



n = 944

(1) The majority of experts (67%) agree that road infrastructure maintenance in their respective countries will be seriously underfunded. A third of all experts disagree.

(2) In most countries, the majority of experts agree that road infrastructure maintenance in their respective countries will be seriously underfunded. Only Australian experts disagree with that view (53%).

(3) The majority of experts agree, regardless their working field.

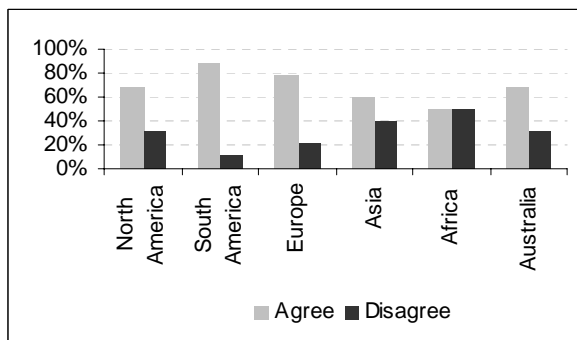
### 2.3.2.6 Road pricing

**Question:** By 2030, road pricing systems will have been introduced for all private and commercial vehicles throughout your country.

(1)

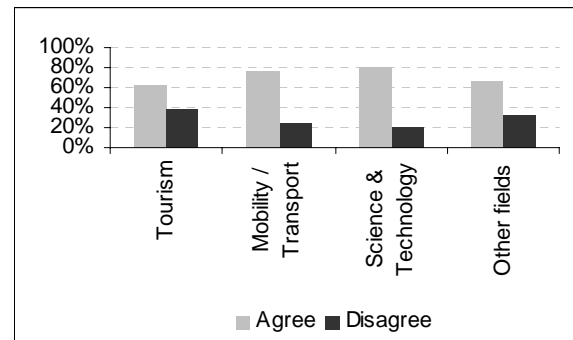


(2) Continent of residence



n = 929

(3) Interviewees' most important work field



n = 944

(1) 75% of all experts agree that road pricing systems will have been introduced for all private and commercial vehicles throughout their respective countries by 2030.

(2) With the exception of Africa, experts from all continents agree that road pricing systems will have been introduced for all private and commercial vehicles throughout their respective countries by 2030. South American (82%) and European experts (72%) agree the most.

(3) Quite regardless their respective working fields, the majority of experts agree, that road pricing systems will have been introduced for all private and commercial vehicles by 2030.

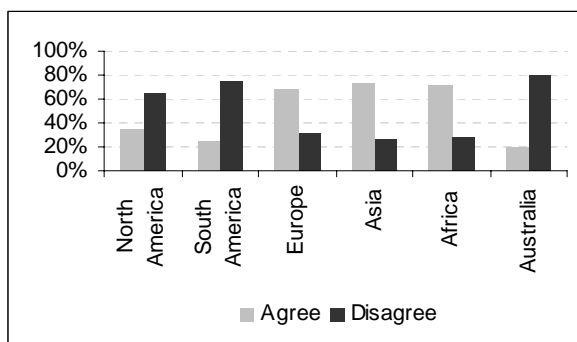
### 2.3.2.7 Replacement of air travel by high speed trains

**Question:** By 2030, air travel on short- and medium-haul routes in your country will have largely been replaced by modern high-speed trains.

(1)

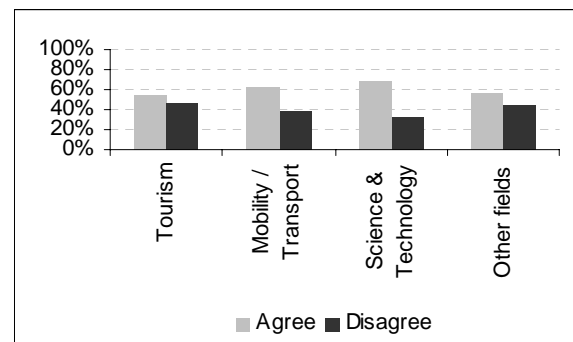


(2) Continent of residence



n = 930

(3) Interviewees' most important work field



n = 945

- (1) The majority of experts (61%) agree that by 2030, air travel on short- and medium-haul routes in your country will have largely been replaced by modern high-speed trains.
- (2) European (68%) and Asian (72%) experts mostly agree, while American and Australian experts mostly disagree (65% / 80% disagreement).
- (3) Experts in mobility / transport (61%) and science & technology experts (67%) agree more often with the statement than tourism experts.

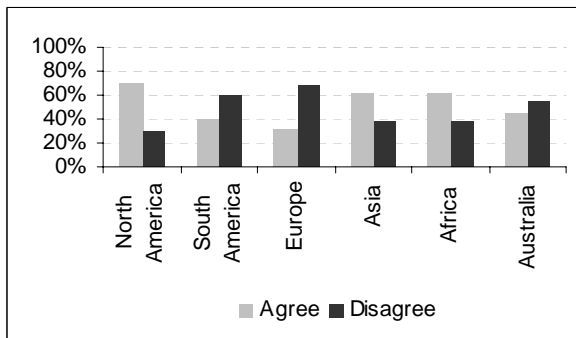
### 2.3.2.8 Subsidies for airline traffic

**Question:** By 2030, the government will be subsidizing airline traffic and its infrastructure in your country.

(1)

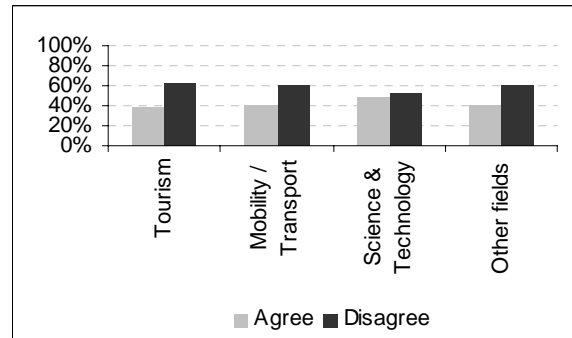


(2) Continent of residence



n = 929

(3) Interviewees' most important work field



n = 944

(1) Most experts (58%) disagree with a view that the government in their respective countries will be subsidizing airline traffic and its infrastructure by 2030.

(2) European experts disagree more often (68%) than experts from other countries do.

(3) Tourism experts disagree more often (68%) than all the others do.



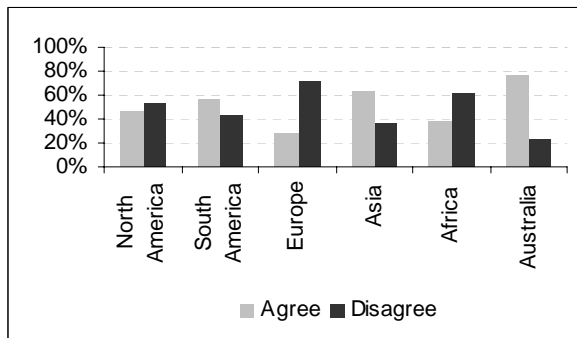
### 2.3.2.9 Maglev trains for urban public transport

**Question:** By 2030, your country will have an economic interest in offering maglev trains for urban public transport.

(1)

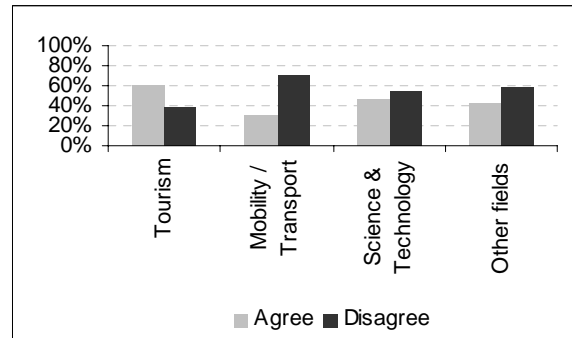


(2) Continent of residence



n = 896

(3) Interviewees' most important work field



n = 909

(1) The majority of experts (64%) disagree that their respective country will have an economic interest in offering maglev trains for urban public transport.

(2) The group of European experts strongly disagrees (71%).

Australian experts have a positive view about urban maglev's future perspectives in their country: They mostly agree with the statement (77%).

(3) Tourism experts agree (60%), while all other expert groups disagree.

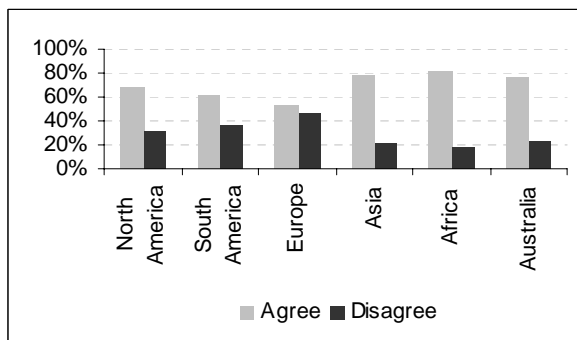
### 2.3.2.10 Maglev trains for rapid airport connections

**Question:** By 2030, your country will have an economic interest in offering maglev trains for rapid airport connections.

(1)

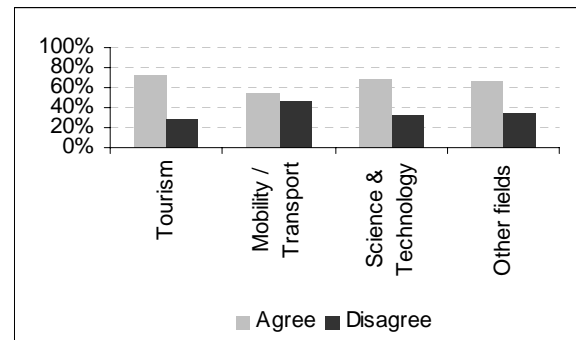


(2) Continent of residence



n = 902

(3) Interviewees' most important work field



n = 916

(1) The majority of experts agree (60%) that their respective countries will have an economic interest in offering maglev trains for rapid airport connections by 2030.

(2) Experts in Asia (78%), Africa (82%), Australia (77%) and America do strongly agree. Compared to other countries, European experts agree less often (54% agree).

(3) Experts of all fields agree with the statement.

Tourism experts agree most often (72%), while transport experts agree relatively less often (54%).

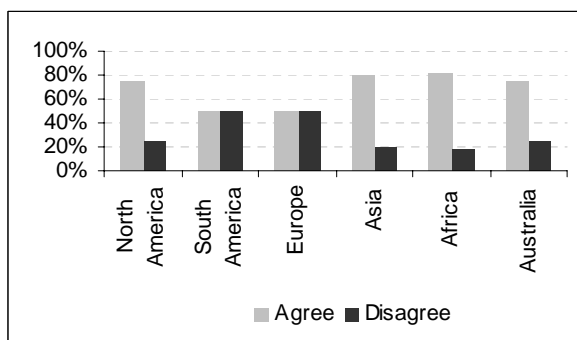
### 2.3.2.11 Maglev trains for high speed intercity travel

**Question:** By 2030, your country will have an economic interest in offering maglev trains for high-speed intercity travel.

(1)

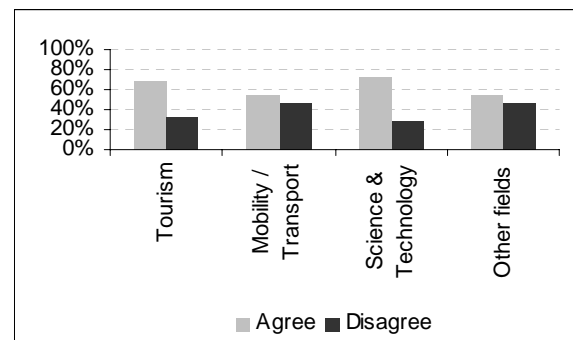


(2) Continent of residence



n = 912

(3) Interviewees' most important work field



n = 926

(1) The majority of experts (59%) agree that their respective countries will have an economic interest in offering maglev trains for high-speed intercity travel.

(2) Asian (79%), African (82%), Australian (75%) and North American (75%) experts strongly agree that their respective countries will have an economic interest in offering maglev trains for high-speed intercity travel.

European and South American experts seem deeply divided over this matter: 50% agree – 50% disagree.

(3) Experts of all working fields mostly agree with the statement.

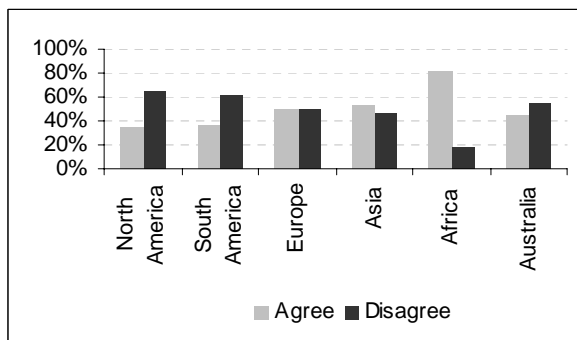
### 2.3.2.12 Night trains with sleeping compartments

**Question:** By 2030, travelers in your country will frequently choose modern night trains with comfortable sleeping compartments for medium-haul routes.

(1)

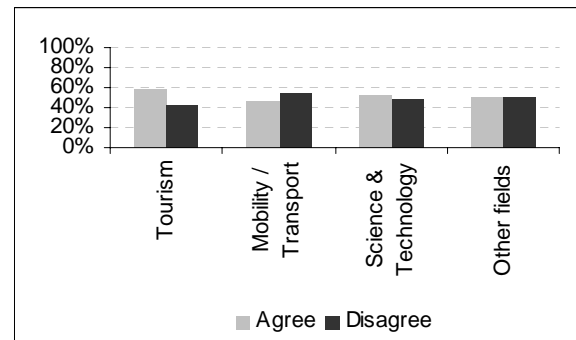


(2) Continent of residence



n = 930

(3) Interviewees' most important work field



n = 945

(1) The experts appear divided over this matter.

(2) Asian (54%) and African experts (81%) agree with the statement.

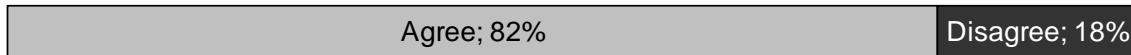
Experts from other continents tend to disagree. North- (64%) and South American experts (63%) disagree the most.

(3) The majority of tourism experts (59%) and science & technology experts (52%) agree that travelers will frequently choose modern night trains with sleeping compartments.

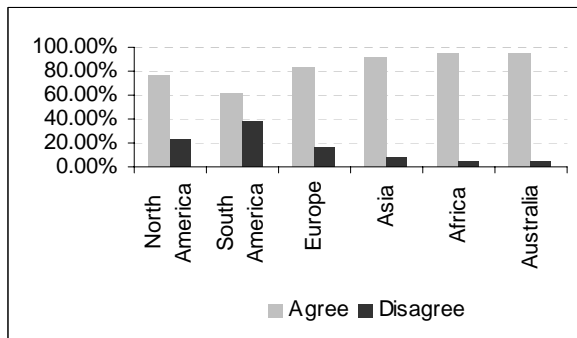
### 2.3.2.13 Share of public transport systems in the modal split

**Question:** In your country, the share of the public transport systems in the modal split of the transportation sector as a whole will have increased significantly by 2030.

(1)

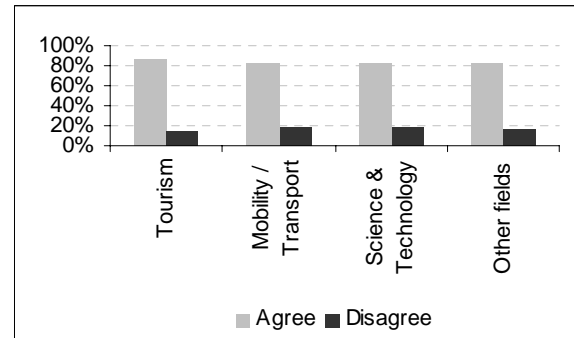


(2) Continent of residence



n = 929

(3) Interviewees' most important work field



n = 943

(1) A vast majority of experts (82%) agree that the share of the public transport systems in the modal split of the transportation sector as a whole will have increased significantly by 2030.

(2) Experts from all continents strongly agree with the statement. The relatively lowest rate of agreement is found among North- (76%) and South American experts (61%).

(3) A vast majority of experts, regardless their respective work fields, agree with the statement.

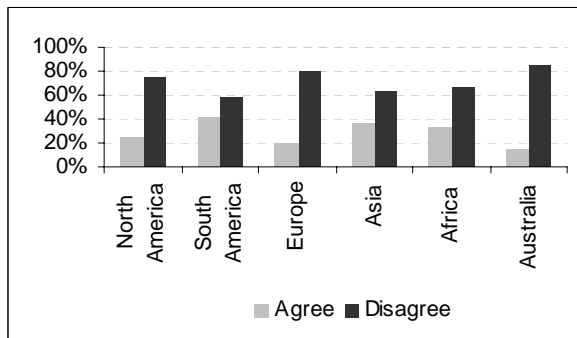
### 2.3.2.14 Top speeds of conventional steel-wheel rail

**Question:** In 2030, wheel-rail traffic in your country will have significantly lower top speeds than today because of efforts to contain energy and maintenance costs.

(1)

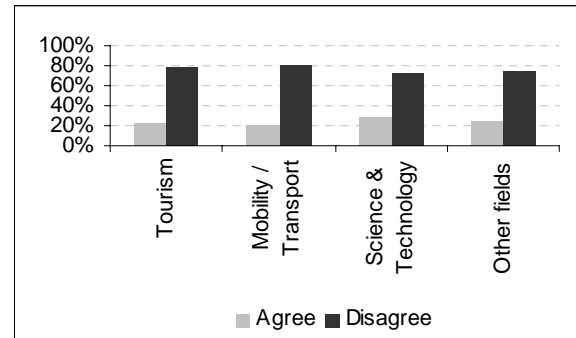


(2) Continent of residence



n = 925

(3) Interviewees' most important work field



n = 940

(1) The majority of experts (78%) disagree that wheel-rail traffic will have significantly lower top speeds than today.

(2) The majority of experts, regardless their geographical origin, disagree with the statement.

(3) The majority of experts, regardless their respective work fields, disagree with the statement.

### 2.3.2.15 Cargo and passenger transport conflicts

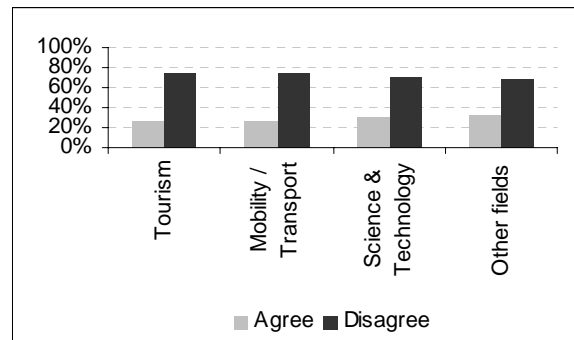
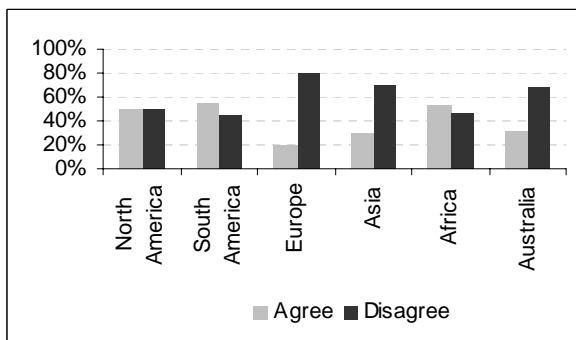
**Question:** By 2030, cargo transport systems in your country will frequently have priority over public passenger transport systems.

(1)



(2) Continent of residence

(3) Interviewees' most important work field



n = 925

n = 941

- (1) The majority of experts (72%) disagree that cargo transport systems will frequently have priority over public passenger transport systems.
- (2) A majority of experts from South America and Africa agree with the statement – while European, Asian and Australian experts strongly disagree.
- (3) The majority of experts, regardless their respective work fields, disagree with the statement.

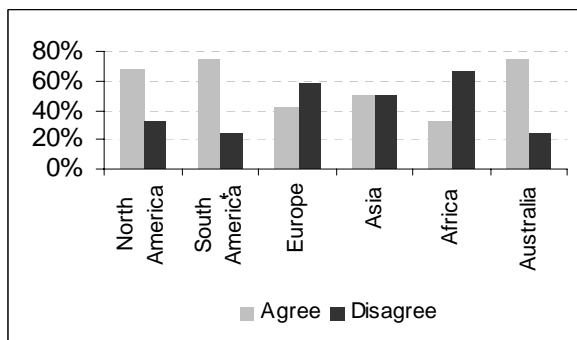
### 2.3.2.16 Pets in public transport

**Question:** Being able to take pets on trips using public transportation will be of great importance to people of your country in 2030.

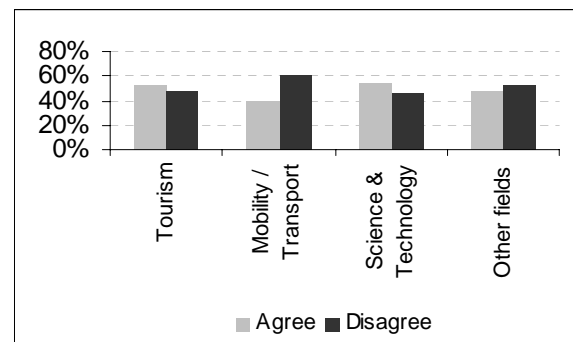
(1)



(2) Continent of residence



(3) Interviewees' most important work field



n = 532

n = 532

\* less than 10 cases

(1) There is no clear trend.

(2) African, European and Asian experts mostly deny a relevance of “Being able to take pets on trips using public transportation “. In contrary to this, Americans and Australians often agree that it will be of importance to be able to bring pets on trips.

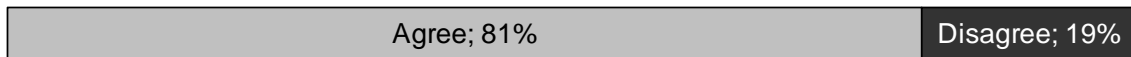
(3) A majority of tourism experts see relevance for “being able to bring pets on public transport trips”. The majority of mobility experts disagree here.



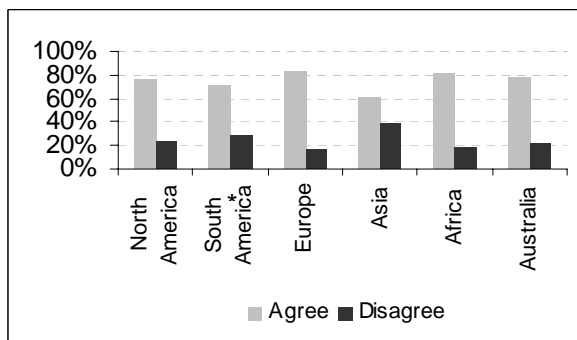
### 2.3.2.17 Low-speed forms of mobility (hiking, biking)

**Question:** Low-speed forms of mobility, e.g. hiking or biking will have become very important for the people in your country by 2030.

(1)



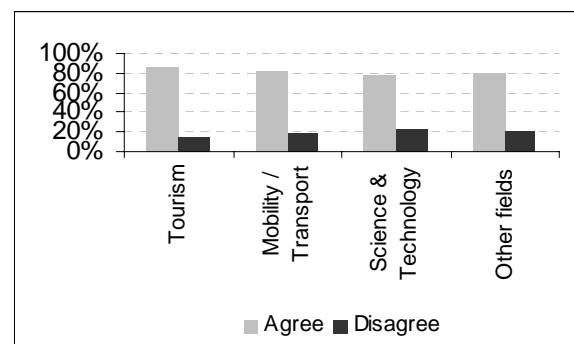
(2) Continent of residence



n = 533

\* less than 10 cases

(3) Interviewees' most important work field



n = 538

(1) The vast majority of experts agree that “Low-speed forms of mobility” will have become very important for the people in their respective countries by 2030.

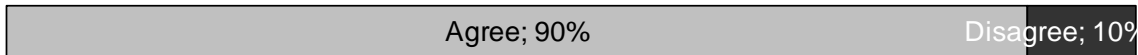
(2) In comparison to other experts, Asian experts agree to a smaller extent.

(3) There are only minor differences with regard to work fields.

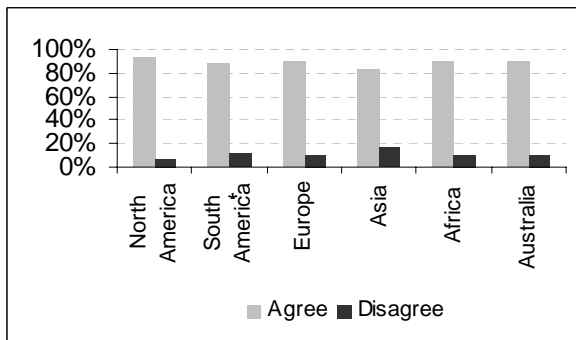
2.3.2.18 Cleanliness of public transportation systems

**Question:** Cleanliness of public transportation systems and train stations will have a strong impact on the acceptance of public transportation in your country by 2030.

(1)



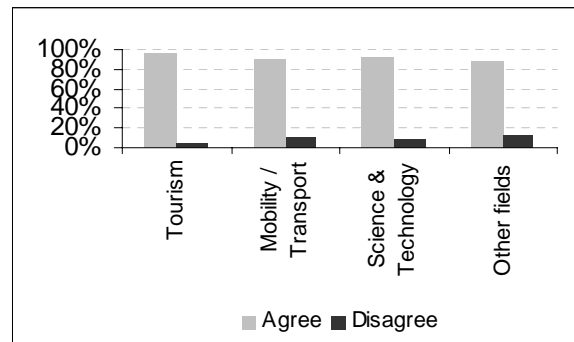
(2) Continent of residence



n = 531

\* less than 10 cases

(3) Interviewees' most important work field



n = 536

(1) The majority of experts (90 %) agree that cleanliness of public transportation systems and train stations will have a strong impact on the acceptance of public transportation in their country by 2030.

(2) There are only little differences with regard to continent.

(3) There are only little differences with regard to work field.

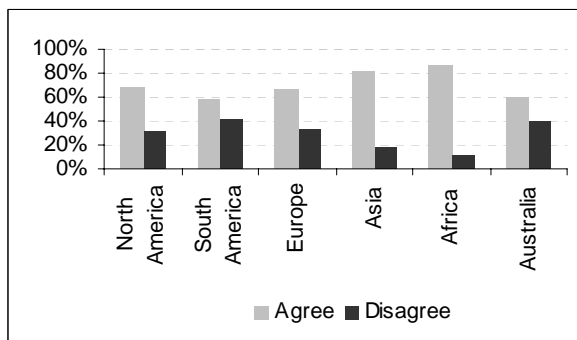
### 2.3.2.19 Luggage handling and door-to-door delivery

**Question:** By 2030, large luggage will be handled by package shipping companies that will send it as an express door-to-door delivery directly to the destination.

(1)

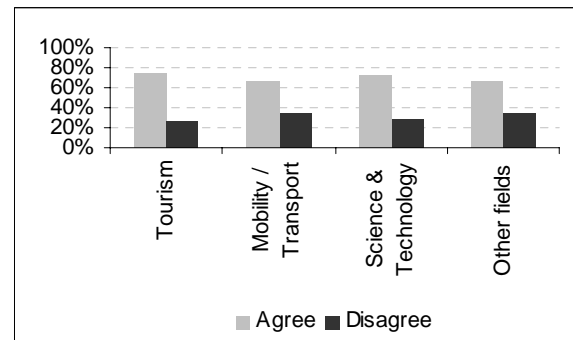


(2) Continent of residence



n = 926

(3) Interviewees' most important work field



n = 944

(1) The majority of experts (68%) agree that in the year 2030 large luggage will be handled by package shipping companies that will send it as an express door-to-door delivery directly to the destination.

(2) The majority of experts, regardless their geographical origin, agree.

(3) The majority of experts, regardless their respective work fields, agree.

## 2.4 Environment and Ecology

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

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

### 2.4.1 Key findings

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

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

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

*Details → pages 122; 123.*

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

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

*Details → page 124.*

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

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

*Details → page 127.*

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

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

*Details → pages 129; 130; 131; 132; 133; 134.*

## 2.4.2 Fact sheets

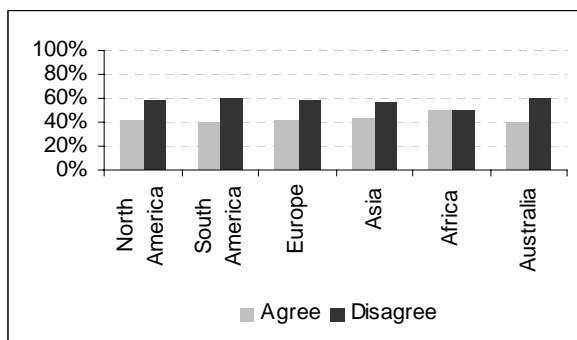
### 2.4.2.1 Energy consumption and pollution of means of transport

**Question:** When comparing private cars and public transport, differences in energy consumption and pollution emission levels are likely to be eliminated in your country by 2030.

(1)

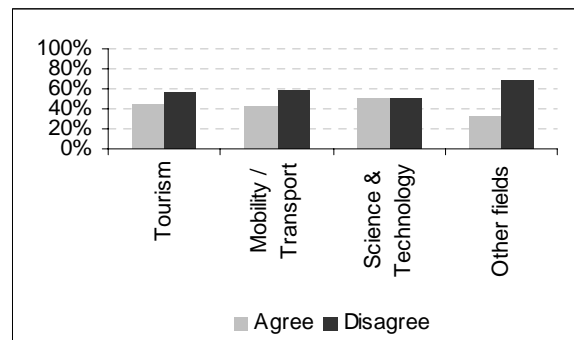


(2) Continent of residence



n = 664

(3) Interviewees' most important work field



n = 672

- (1) The majority of experts (58%) disagree that differences in energy consumption and pollution emission levels (between private cars and public transport) are likely to be eliminated in their country.
- (2) 50% of the African experts disagree that those differences are likely to be eliminated in their country. All the other experts disagree to a much higher extent.
- (3) 51% of the experts working in science and technology disagree that those differences are likely to be eliminated in their country. All the other experts disagree to a much higher extent.

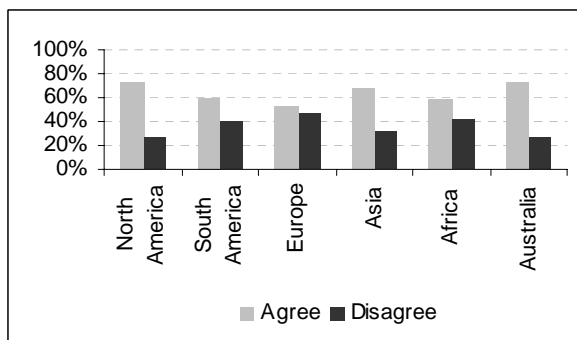
### 2.4.2.2 Compensation of energy costs through efficiency gains

**Question:** By 2030, your country will have found ways of compensating the rising costs of energy and raw materials through efficiency gains.

(1)

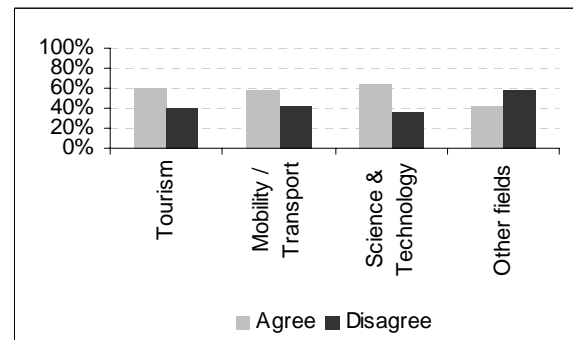


(2) Continent of residence



n = 667

(3) Interviewees' most important work field



n = 675

- (1) The majority of experts (57%) agree that their country will have found ways of compensating the rising costs of energy and raw materials through efficiency gains.
- (2) Just 53% of the European experts agree that their country will have found ways of compensating rising costs through efficiency gains. All the other experts agree to a much higher extent (e.g. North American and Australian experts agree both with 73%).
- (3) Only a minority of 42% of experts from “other fields” agree that their country will have found ways of compensating rising costs through efficiency gains.  
Experts from all other fields agree to a much higher extent. (e.g. science and technology experts agree with 64%).

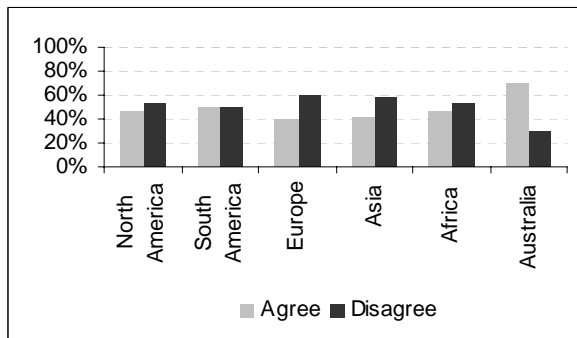
### 2.4.2.3 Transportation – Energy efficiency

**Question:** By 2030, your country will no longer experience a shortage of energy in its transportation sector because it will have learned to use available energy sources more efficiently.

(1)

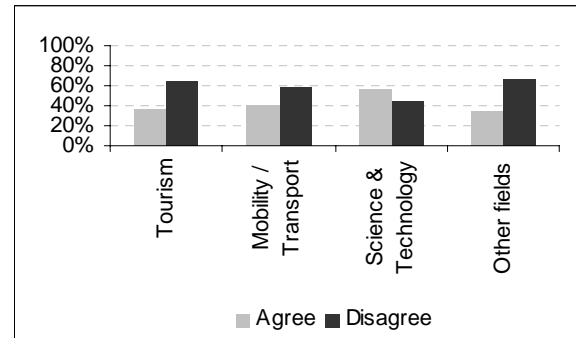


(2) Continent of residence



n = 666

(3) Interviewees' most important work field



n = 674

(1) The majority of experts disagree with the statement (58%).

(2) In a sharp contrast to experts from other continents, 70% of Australian experts agree that their country will not experience a shortage of energy in its transportation sector in 2030 because it will have learned to use available energy sources more efficiently.

(3) Science and technology experts (56%) agree more with the statement than experts from other work fields do. Tourism experts are especially sceptical.

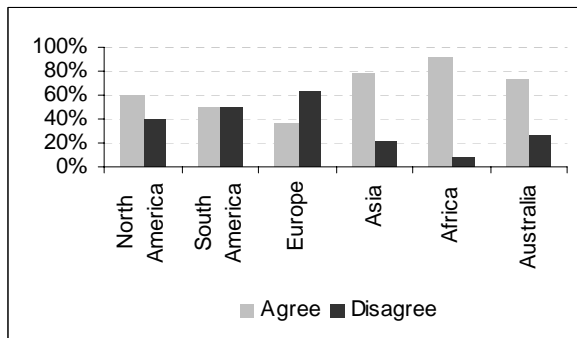
#### 2.4.2.4 Air travel – Environmental concerns

**Question:** By 2030, cleaner jet engines with lower noise emissions will have significantly reshaped attitudes toward the environmental impact of air travel in your country.

(1)

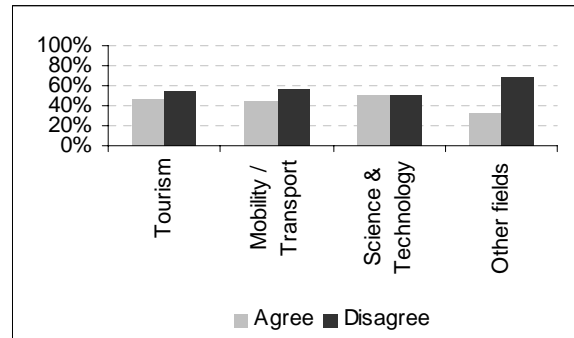


(2) Continent of residence



n = 667

(3) Interviewees' most important work field



n = 675

(1) The majority of experts disagree with the statement (57%).

(2) Asian (78%) and African (92%) experts agree more than European (36%) experts.

(3) Mobility and transport (44%) and tourism (46%) experts agree more than experts from "other fields" (32%).



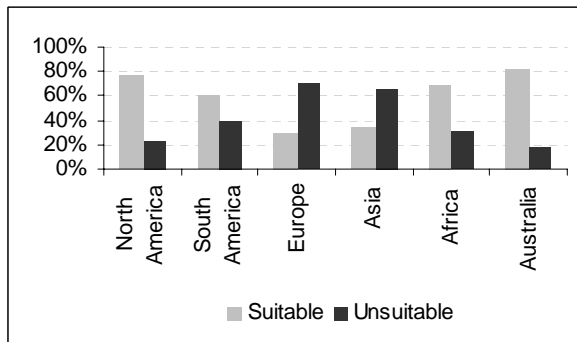
### 2.4.2.5 Alternatives to air travel – One’s own car

**Question:** By 2030, which means of transportation would generally be suitable for people in your country as an attractive alternative to air travel on distances of up to 650 miles / 1000 km? – The own car

(1)

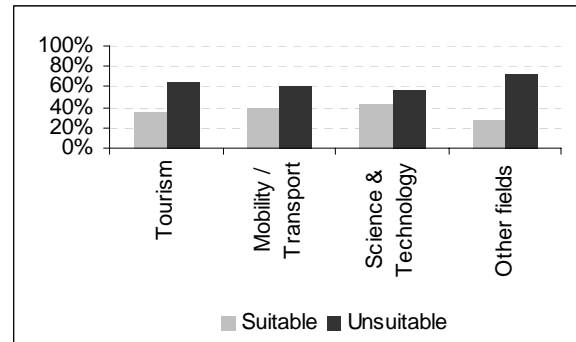


(2) Continent of residence



n = 622

(3) Interviewees’ most important work field



n = 628

(1) The majority of experts (62%) see “one’s own car” as an unsuitable alternative to air travel on distances of up to 650 miles / 1000 km.

(2) 71% of the European and 65% of the Asian experts consider the own car in their country being an unsuitable alternative in 2030.

In a sharp contrast to the European / Asian experts’ view, the majority of experts from other continents see the private car as a suitable alternative (e.g. 82% of the Australian and 78% of the North American experts consider the own car suitable).

(3) The majority of experts from all work fields consider the own car as an unsuitable alternative (e.g. 65% of the tourism and 60% of the mobility and transport experts consider it as unsuitable).

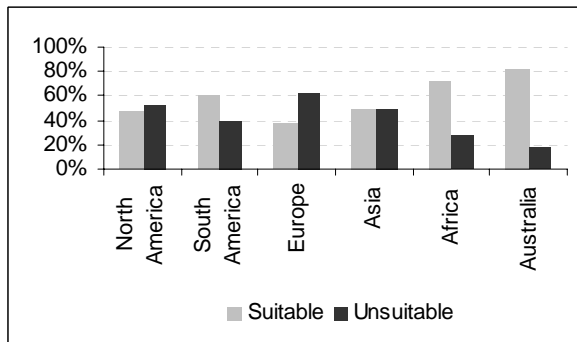
### 2.4.2.6 Alternatives to air travel – Long distance bus

**Question:** By 2030, which means of transportation would generally be suitable for people in your country as an attractive alternative to air travel on distances of up to 650 miles / 1000 km? – The Long-distance bus

(1)

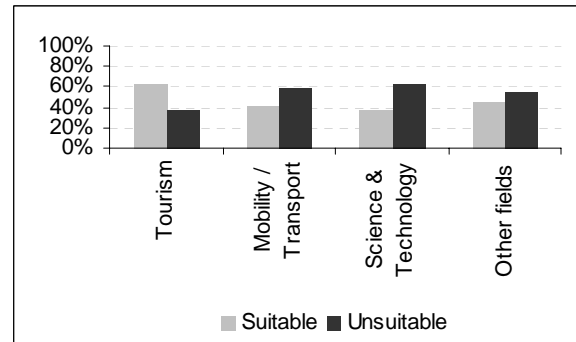


(2) Continent of residence



n = 633

(3) Interviewees' most important work field



n = 640

(1) The majority of experts regard the long-distance bus as unsuitable (58%).

(2) Experts from South America (60%), Africa (72%) and Australia (82%) consider the long-distance bus as more suitable than the experts from other continents do.

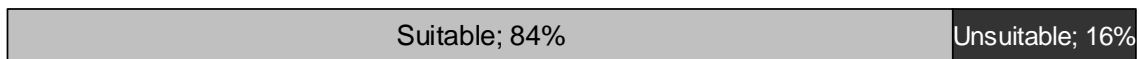
(3) Only tourism experts (63%) regard the long-distance bus as suitable.

The majority of experts from all other work fields think that the bus is an unsuitable means of transportation for long-distance travel.

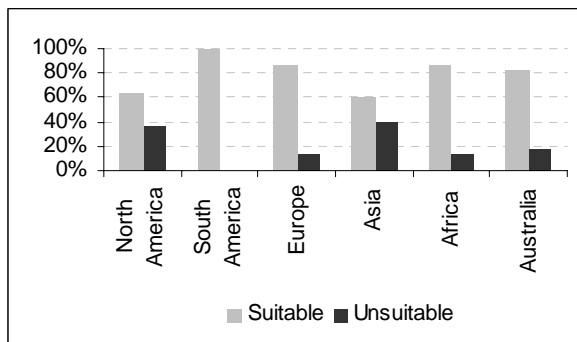
### 2.4.2.7 Alternatives to air travel – Overnight trains

**Question:** By 2030, which means of transportation would generally be suitable for people in your country as an attractive alternative to air travel on distances of up to 650 miles / 1000 km? - Overnight trains with comfortable sleeping compartments

(1)

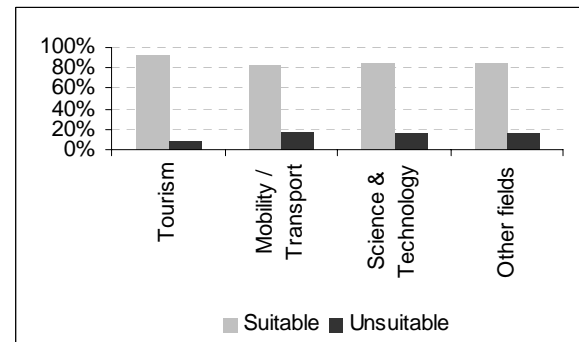


(2) Continent of residence



n = 639

(3) Interviewees' most important work field



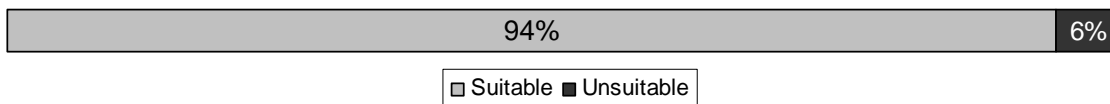
n = 645

- (1) The majority of experts (84%) consider overnight trains with comfortable sleeping compartments as a suitable alternative to air travel on distances of up to 650 miles / 1000 km.
- (2) 100% of the South American and 88% of the European and African experts see the overnight train as a suitable alternative to air travel.  
Compared with experts from other continents, Asian and North American experts rate overnight trains relatively low (49%; 38%).
- (3) The majority of experts from all work fields consider the overnight train to be a suitable alternative (e.g. 92% of the tourism and 85% of the science and technology experts consider it suitable).

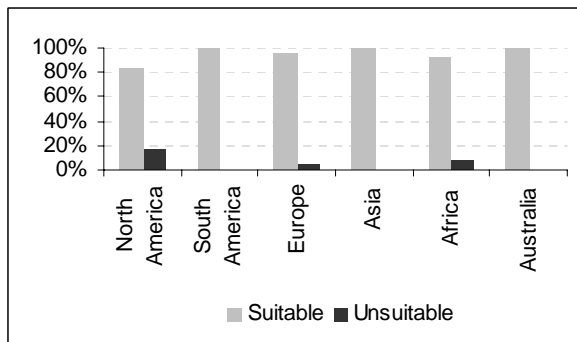
### 2.4.2.8 Alternatives to air travel – High-speed wheel-rail trains

**Question:** By 2030, which means of transportation would generally be suitable for people in your country as an attractive alternative to air travel on distances of up to 650 miles / 1000 km? - High-speed wheel-rail trains

(1)

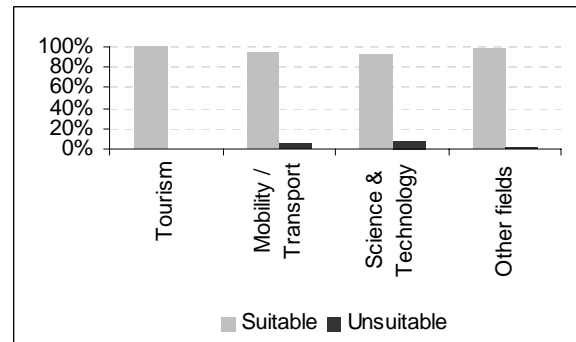


(2) Continent of residence



n = 646

(3) Interviewees' most important work field



n = 653

(1) The majority of experts (94%) see the high-speed wheel-rail trains as a suitable alternative to air travel on distances of up to 650 miles / 1000 km.

(2) 100% of the South American, the Asian and the Australian experts see high-speed wheel-rail trains as a suitable alternative. In comparison just 84% of the North American experts consider those trains as suitable.

(3) The majority of experts from all work fields consider high-speed wheel-rail trains a suitable alternative (e.g. 100% of the tourism and 93% of the mobility and transport experts consider it as suitable).

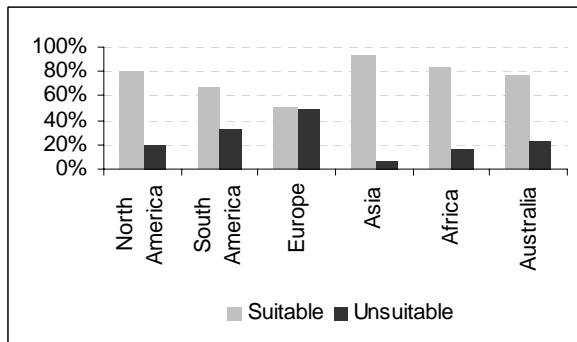
2.4.2.9 Alternatives to air travel – High-speed maglev trains

**Question:** By 2030, which means of transportation would generally be suitable for people in your country as an attractive alternative to air travel on distances of up to 650 miles / 1000 km? – High-speed maglev trains

(1)

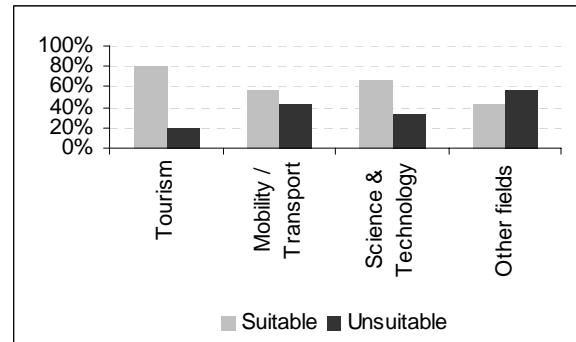


(2) Continent of residence



n = 638

(3) Interviewees' most important work field



n = 646

(1) The majority of experts (59%) see high-speed maglev's as a suitable alternative to air travel on distances of up to 650 miles / 1000 km.

(2) 93% of the Asian, 83% of the African and 80% of the North American experts rate high-speed maglev trains as a suitable alternative. In comparison just 51% of the European experts consider maglev trains suitable.

(3) 81% of the tourism experts consider the high-speed maglev train as a suitable alternative. In comparison only 66% of science and technology and 57% of mobility and transport experts consider maglev trains as a suitable alternative.

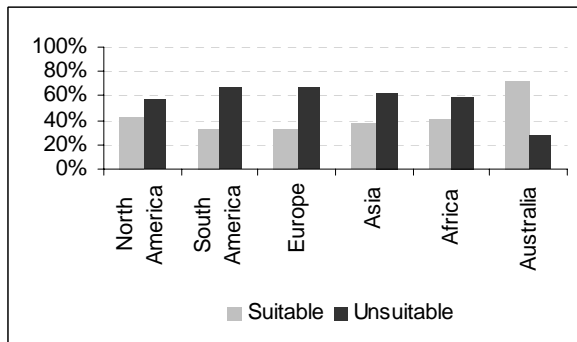
### 2.4.2.10 Alternatives to air travel – Ferries and ships

**Question:** By 2030, which means of transportation would generally be suitable for people in your country as an attractive alternative to air travel on distances of up to 650 miles / 1000 km? – Ferries and ships with comfortable cabins

(1)

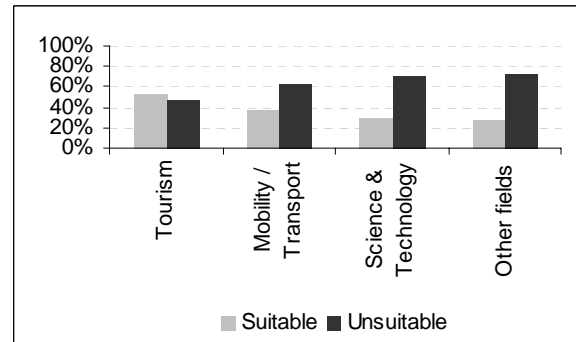


(2) Continent of residence



n = 632

(3) Interviewees' most important work field



n = 639

(1) The majority of experts rate “ferries and ships with comfortable cabins” as an unsuitable alternative to air travel (64%).

(2) The majority of Australian experts regard the ferries and ships with comfortable cabins as suitable (71%).

The majority of experts from the other continents regard them as unsuitable.

(3) Tourism experts (53%) regard the ferries and ships with comfortable cabins more often as suitable than experts from all other fields.

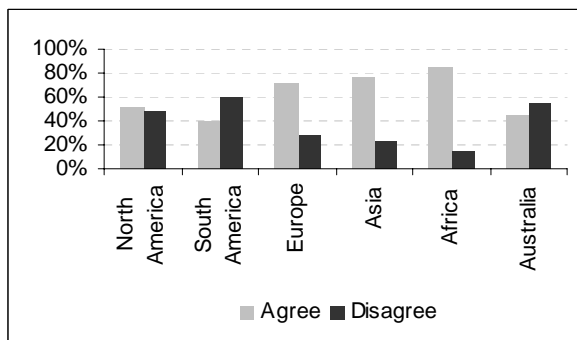
### 2.4.2.11 Urban transport – Public versus private transport

**Question:** By 2030, the debate between public and private transportation in cities will generally have been settled in favour of public transportation systems.

(1)

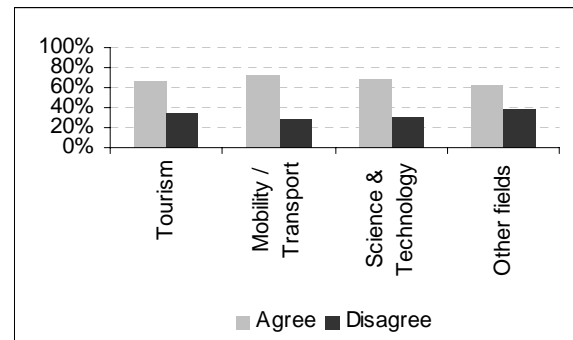


(2) Continent of residence



n = 666

(3) Interviewees' most important work field



n = 674

(1) The majority of experts agree with the statement (69%).

(2) European experts (72%) agree more than North American experts (51%). African (84%) and Asian (76%) experts agree more often than South American (40%) experts.

(3) The majority of experts from all work fields agree with the statement.

### 2.4.2.12 Urban Transport - Bicycle Traffic

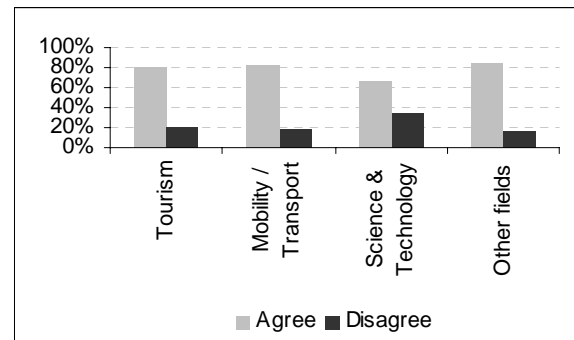
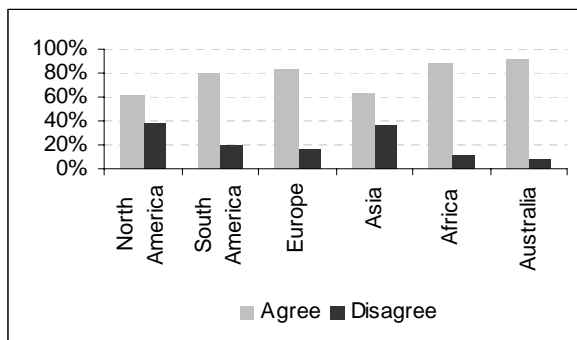
**Question:** By 2030, bicycle traffic in cities will have a significantly higher share in the modal split than it does today.

(1)



(2) Continent of residence

(3) Interviewees' most important work field



n = 665

n = 673

- (1) The majority of experts (80%) agree with the statement that bicycle traffic in cities will have, by 2030, a significantly higher share in the modal split than it does today.
- (2) 91% of the Australian, 89% of the African and 83% of the European experts agree with the statement that bicycle traffic in cities will have a higher share in the modal split. In comparison just 63% of the Asian and 62% of the North American experts agree with the statement.
- (3) 83% of the mobility and transport and 81% of the tourism experts agree with the statement that bicycle traffic in cities will have a higher share in the modal split. Only 67% of the science and technology experts agree with the statement.



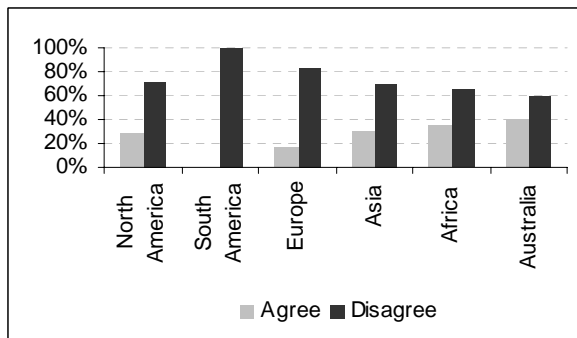
2.4.2.13 Urban transport - bicycle taxes and fees for public parking

**Question:** By 2030, your country will have introduced taxes for bicycles and fees for public bicycle parking.

(1)

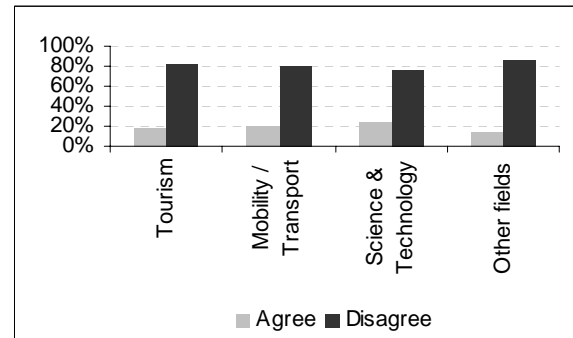


(2) Continent of residence



n = 666

(3) Interviewees' most important work field



n = 674

- (1) The majority of experts (80%) disagree with the statement that their country will have introduced taxes for bicycles and fees for public bicycle parking by 2030.
- (2) 100% of the South American and 83% of the European experts disagree with the statement that their country will have introduced taxes and fees. In comparison just 60% of the Australian experts disagree with the statement.
- (3) 82% of the tourism and 80% of the mobility and transport experts disagree with the statement that their country will have introduced taxes and fees.

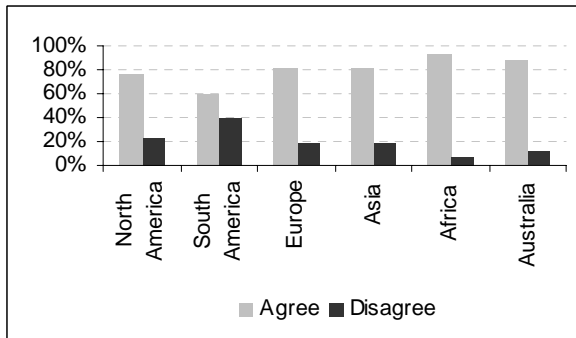
2.4.2.14 Consequences of climate change – Long-haul air travel

**Question:** By 2030, the consequences of climate change may be interfering significantly with transportation schedules. Does this apply to the following types of transportation in your country? - Long-haul air travel

(1)

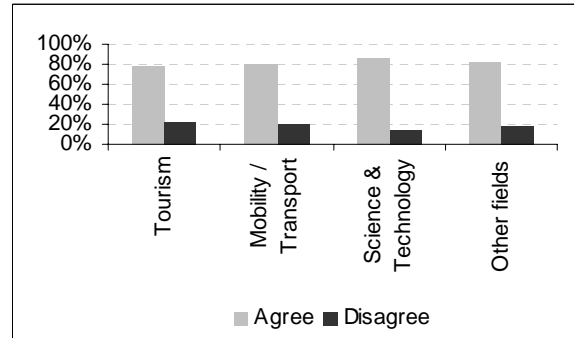


(2) Continent of residence



n = 651

(3) Interviewees' most important work field



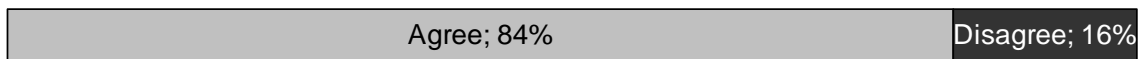
n = 659

- (1) The majority of experts (82%) agree with the statement that the consequences of the climate change may be interfering significantly with the transportation schedules of long-haul air travel.
- (2) 93% of the African and 89% of the Australian experts agree with the statement that the climate change will interfere with the transportation schedules of long-haul air travel. In comparison just 60% of the South American experts agree with this statement.
- (3) 86% of the science and technology and 80% of the mobility and transport experts agree with this statement.

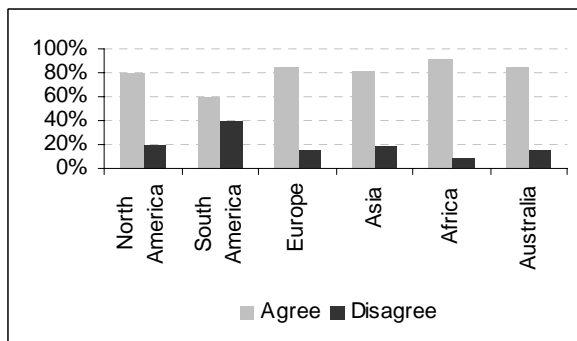
### 2.4.2.15 Consequences of climate change – Short-and medium-haul air travel

**Question:** By 2030, the consequences of climate change may be interfering significantly with transportation schedules. Does this apply to the following types of transportation in your country? - Short- and medium-haul air travel

(1)

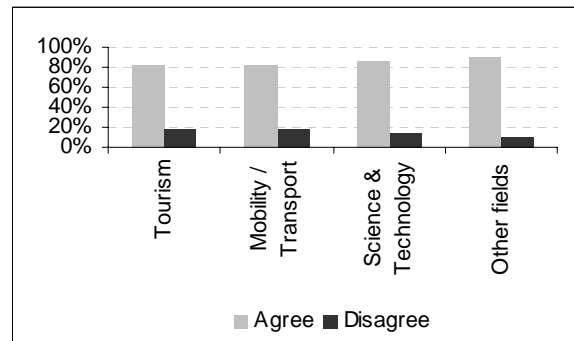


(2) Continent of residence



n = 652

(3) Interviewees' most important work field



n = 660

- (1) The majority of experts (84%) agree with the statement that the consequences of the climate change may be interfering significantly with the transportation schedules of short- and medium-haul air travel.
- (2) 92% of the African and 86% of the Australian experts agree with the statement that the climate change will interfere with the transportation schedules of short- and medium-haul air travel. In comparison just 80% of the North American and 60% of the South American experts agree with this statement.
- (3) 86% of the science and technology and 82% of the mobility and transport experts agree with this statement.

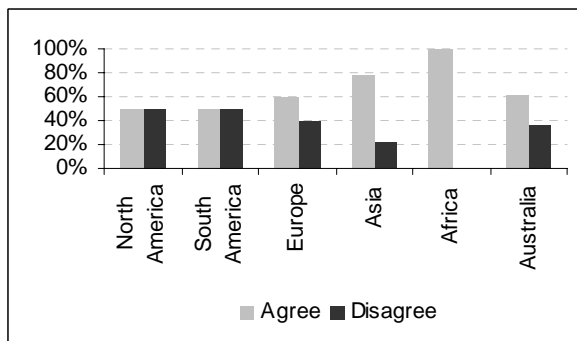
2.4.2.16 Consequences of climate change – High-speed train travel

**Question:** By 2030, the consequences of climate change may be interfering significantly with transportation schedules. Does this apply to the following types of transportation in your country? - High-speed train travel

(1)

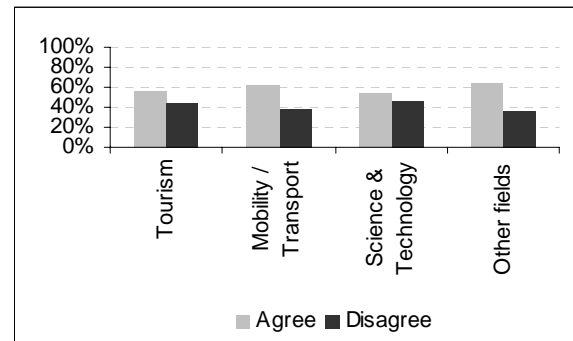


(2) Continent of residence



n = 664

(3) Interviewees' most important work field



n = 672

(1) The majority of experts (61%) agree with the statement that the consequences of the climate change may be interfering significantly with the transportation schedules of high-speed train travel.

(2) 100% of the African and 78% of the Asian experts agree with the statement that the climate change will interfere with the transportation schedules of high-speed train travel. In comparison just 50% of the North American, 50% of the South American and 61% of the European experts agree with this statement.

(3) 62% of the mobility and transport experts agree with this statement. In comparison only 55% of the science and technology experts agree with the statement.

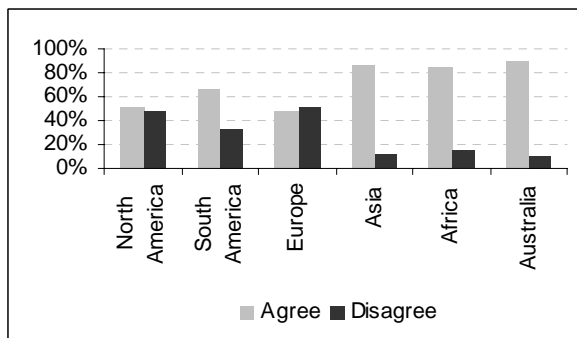
2.4.2.17 Consequences of climate change – Regional train travel

**Question:** By 2030, the consequences of climate change may be interfering significantly with transportation schedules. Does this apply to the following types of transportation in your country? - Regional train travel

(1)

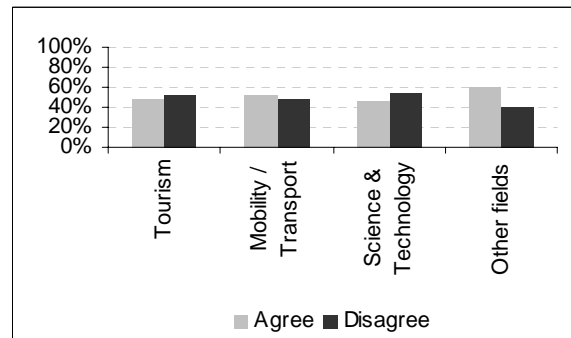


(2) Continent of residence



n = 646

(3) Interviewees' most important work field



n = 652

(1) The majority of experts agree with the statement (52%).

(2) African (86%), Asian (88%) and Australian (90%) experts agree more often than European experts (48%).

(3) Mobility and transport experts (53%) agree more often than science and technology experts (45%).

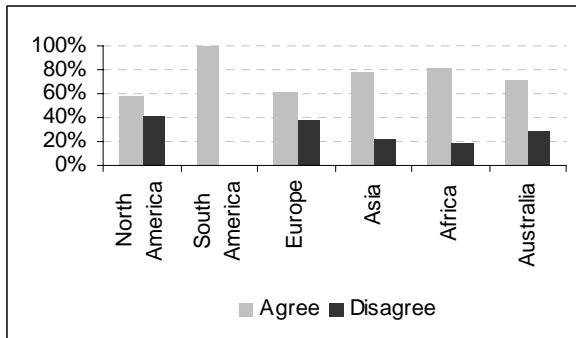
2.4.2.18 Consequences of climate change – Long distance bus travel

**Question:** By 2030, the consequences of climate change may be interfering significantly with transportation schedules. Does this apply to the following types of transportation in your country? - Long distance bus travel

(1)

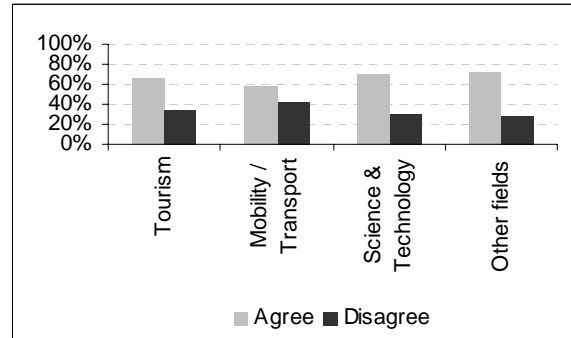


(2) Continent of residence



n = 645

(3) Interviewees' most important work field



n = 651

(1) The majority of experts agree with the statement (64%).

(2) South American (100%) and African (82%) experts agree more often than European (62%) and North American (59%) experts.

(3) Science and technology experts (70%) agree more often than mobility and transport experts (59%).

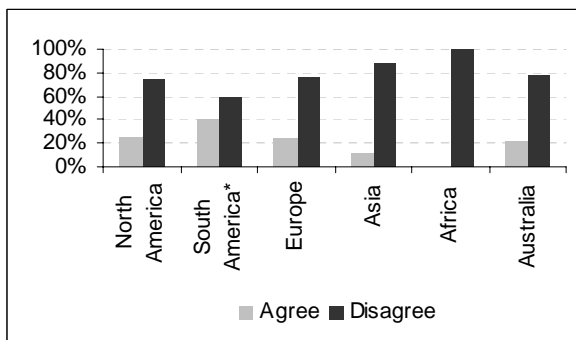
2.4.2.19 Consequences of climate change – cruises

**Question:** The consequences of climate change will have no negative impact on demand for cruises by 2030.

(1)



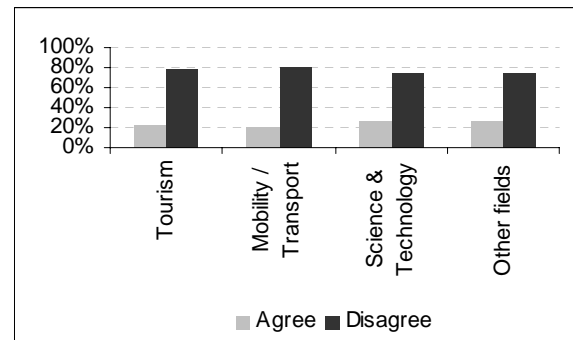
(2) Continent of residence



n = 534

\* less than 10 cases

(3) Interviewees' most important work field



n = 540

(1) The majority of experts (77%) consider that the consequences of climate change will have some negative impact on demand for cruises by 2030.

(2) Experts from all continents disagree with the statement that the consequences of climate change will have *no* negative impact on demand for cruises (e.g. 100% of the African and 88% of the Asian experts believe that the consequences of climate change will have a negative impact on demand for cruises).

(3) Most of the experts from all work fields are convinced that the consequences of climate change will have a negative impact on demand for cruises by 2030.

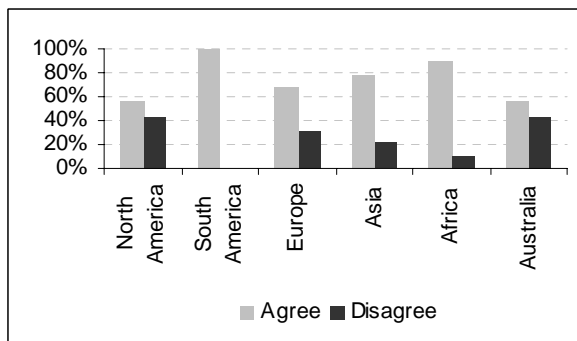
### 2.4.2.20 Consequences of climate change – Passenger boat travel

**Question:** By 2030, the consequences of climate change may be interfering significantly with transportation schedules. Does this apply to the following types of transportation in your country? - Passenger boat travel

(1)

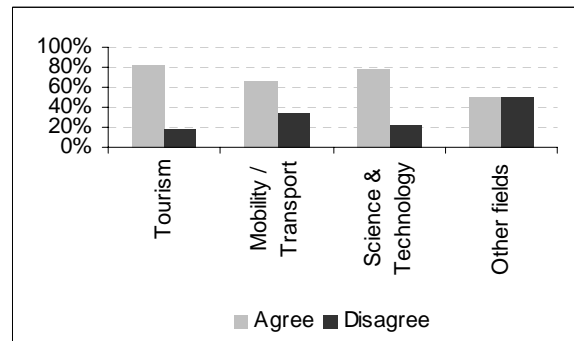


(2) Continent of residence



n = 644

(3) Interviewees' most important work field



n = 650

(1) The majority of experts agree with the statement (68%).

(2) South American (100%) and African (90%) experts agree more often than European (68%) and North American (57%) experts.

(3) Tourism experts (82%) agree more often than mobility and transport experts (66%).



## 2.5 Information and Communication Technologies

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

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

### 2.5.1 Key findings

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

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

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

*Details → page 139; 140*

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

A vast majority of experts see a high relevance for the technical functions of mobile devices for travelers. Most experts agree that mobile devices will give directions (99% agreement); will act as tour guide (93% → page 144); will have credit payment functions (credit 82%, credit cards 73% → pages 145, 146), allow for last minute reservations (86% → page 152), will make use of voice recognition (78%, → page 141) and real time translation (73%, → page 151).

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

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

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

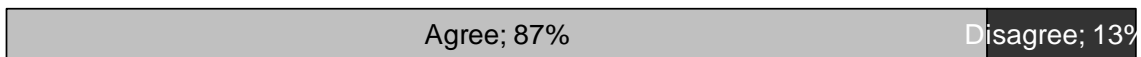
In general, when expert opinions about the perspectives of mobile technical devices for travelers are compared by continent, Asian and North American experts tend to agree more often than European experts. This indicates that the perception of technologies could be influenced by cultural and/or societal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

## 2.5.2 Fact sheets

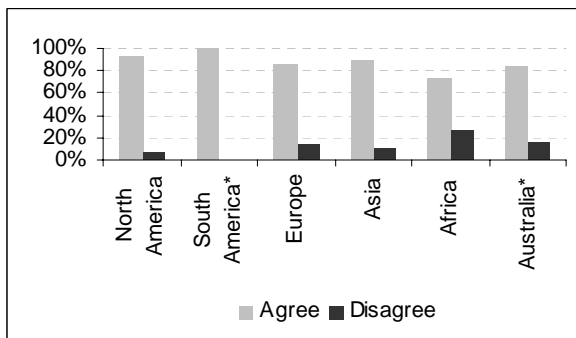
### 2.5.2.1 Public transport – Best-pricing

**Question:** By 2030, best-price payment practices (discounting) based on electronically entered travel routes will be widely used in public transportation.

(1)



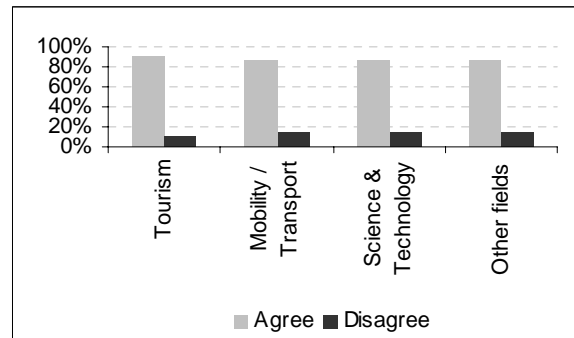
(2) Continent of residence



n = 519

\* less than 10 cases

(3) Interviewees' most important work field



n = 526

(1) The majority of experts agree with the statement (87%).

(2) South American experts (100%) agree more than all the other experts.

(3) Most of the experts of all fields agree with the statement.

### 2.5.2.2 Public transport – electronic ticketing

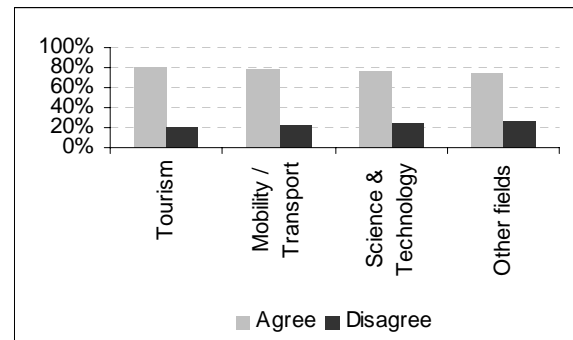
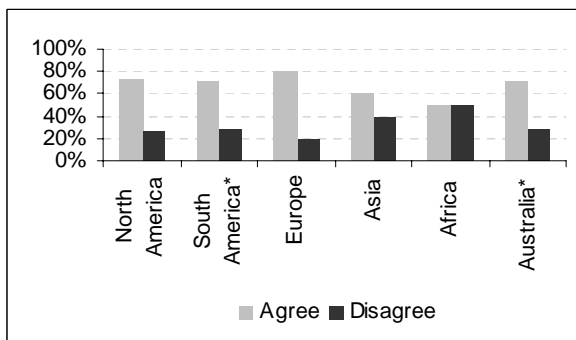
**Question:** By 2030, no one in your country will be paying their ticket (public transport) and toll (private car) by cash.

(1)



(2) Continent of residence

(3) Interviewees' most important work field



n = 520

n = 527

\* less than 10 cases

(1) The majority of experts agree with the statement (77%).

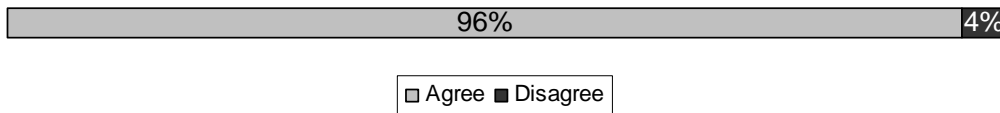
(2) African experts (50%) disagree more with the statement than all the others do.

(3) Most of the experts of all fields agree with the statement.

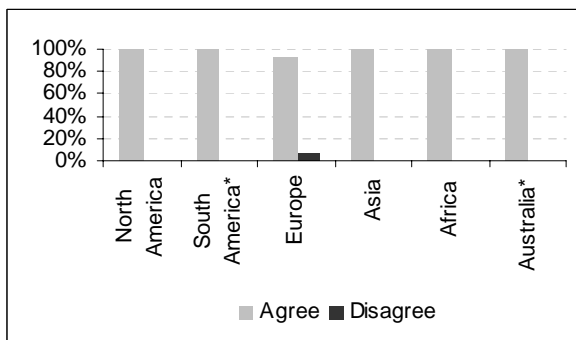
### 2.5.2.3 Mobile end-user devices – technology merge

**Question:** By 2030, communication, information, booking, navigation, and payment systems will have converged into mobile end-user devices.

(1)



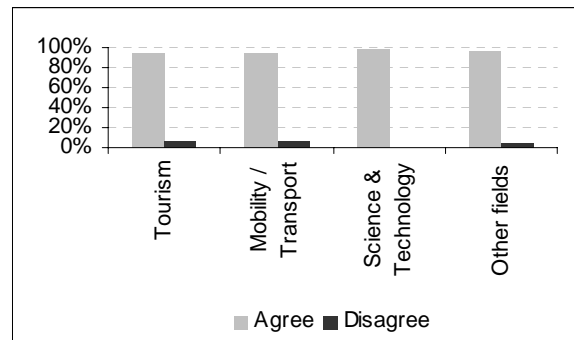
(2) Continent of residence



n = 518

\* less than 10 cases

(3) Interviewees' most important work field



n = 525

(1) The majority of experts agree with the statement (96%).

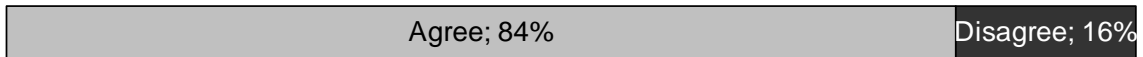
(2) While Asian, African and American experts fully agree (100%, respectively), European experts are agree the least (93%).

(3) Most of the experts of all work fields agree with the statement.

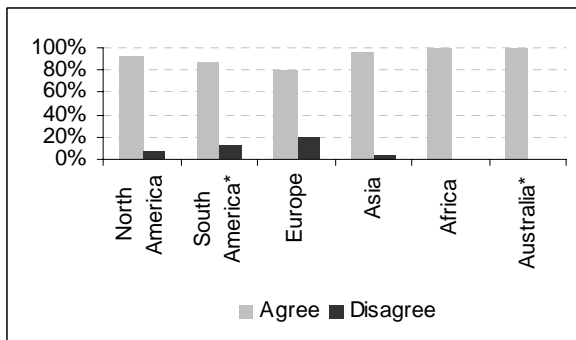
2.5.2.4 Mobile end-user devices – Travel services

**Question:** By 2030, most travel services will be booked using mobile devices (e.g. mobile phones, handheld computers).

(1)



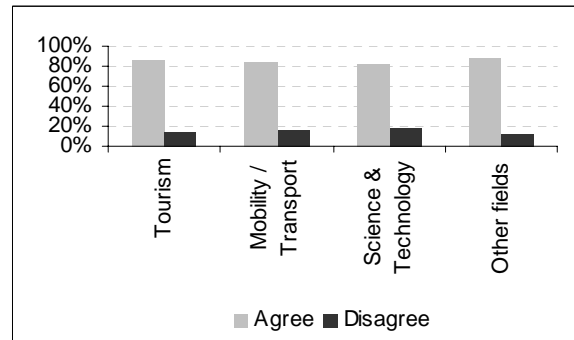
(2) Continent of residence



n = 520

\* less than 10 cases

(3) Interviewees' most important work field



n = 527

(1) The majority of experts agree with the statement (84%).

(2) European (81%) experts agree significantly less than experts from other continents, like Asian (96% agreement) or African experts (100%).

(3) Most of the experts of all fields agree with the statement.

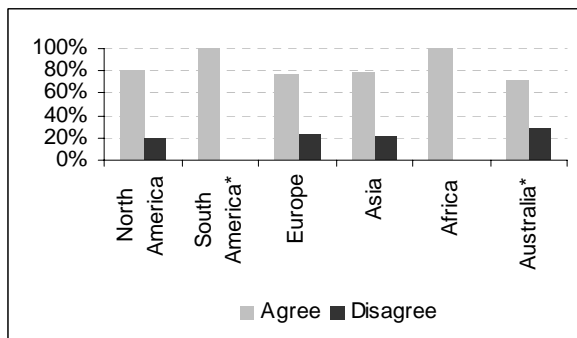
### 2.5.2.5 Mobile end-user devices – Voice-recognition

**Question:** In 2030, the use of voice-recognition systems for automated communication, booking, and payment procedures will have become widely accepted.

(1)



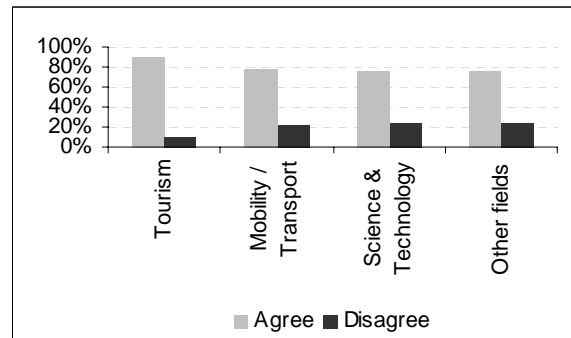
(2) Continent of residence



n = 520

\* less than 10 cases

(3) Interviewees' most important work field



n = 527

(1) The majority of experts agree with the statement (78%).

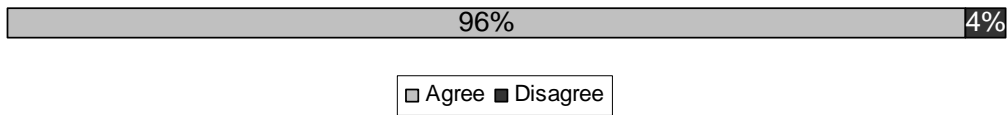
(2) African experts fully agree (100%), while Europeans (compared with experts from other continents) agree the least (77%).

(3) The vast majority of experts from all work fields agree with the statement.

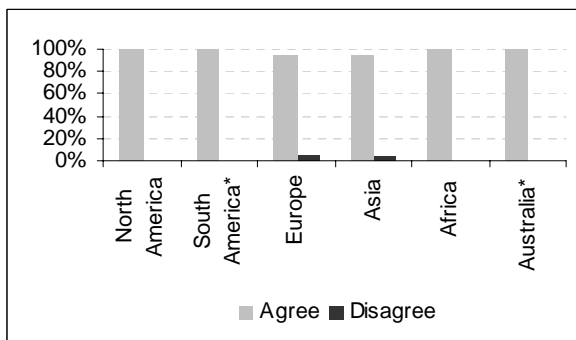
2.5.2.6 Mobile end-user devices – Taking pictures

**Question:** By 2030, mobile devices will have the following function for travellers in your country: Taking pictures

(1)



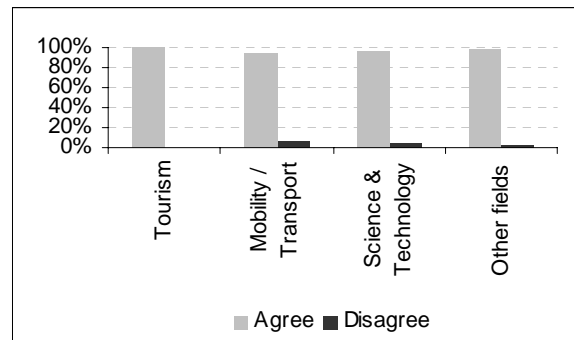
(2) Continent of residence



n = 512

\* less than 10 cases

(3) Interviewees' most important work field



n = 519

(1) The majority of experts agree with the statement (96%).

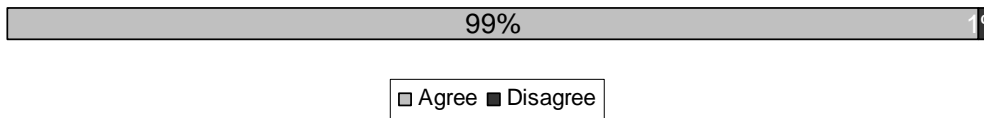
(2) Most of the experts (worldwide) agree with the statement.

(3) Most of the experts of all fields agree with the statement.

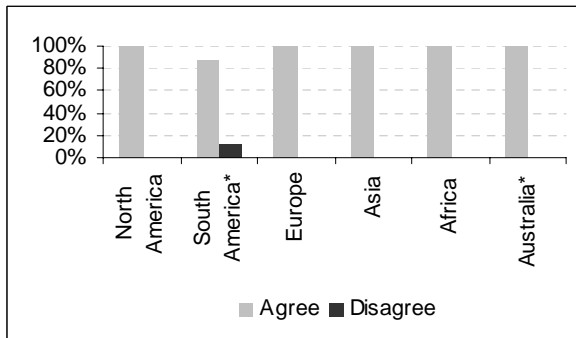
### 2.5.2.7 Mobile end-user devices – Giving directions

**Question:** By 2030, mobile devices will have the following function for travellers in your country: Giving directions

(1)



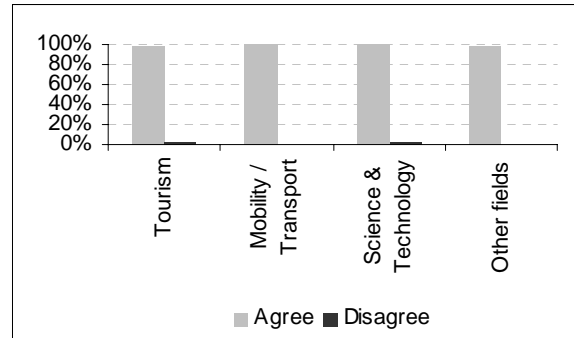
(2) Continent of residence



n = 511

\* less than 10 cases

(3) Interviewees' most important work field



n = 518

(1) The majority of experts agree with the statement (99%).

(2) All experts (except from South America 88%) agree with the statement 100%.

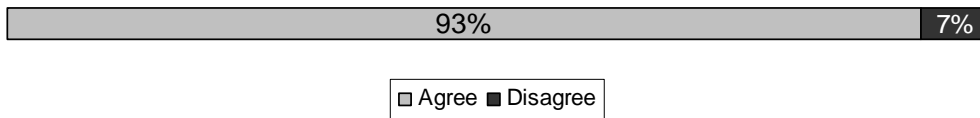
(3) The majority of experts differentiated by their main work field agree with the statement.



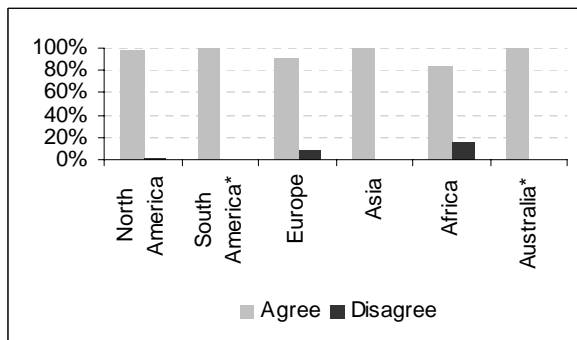
2.5.2.8 Mobile end-user devices – Travel guides (podcasts, text, images)

Question: By 2030, mobile devices will have the following function for travellers in your country: Travel guides (podcasts, text, images)

(1)



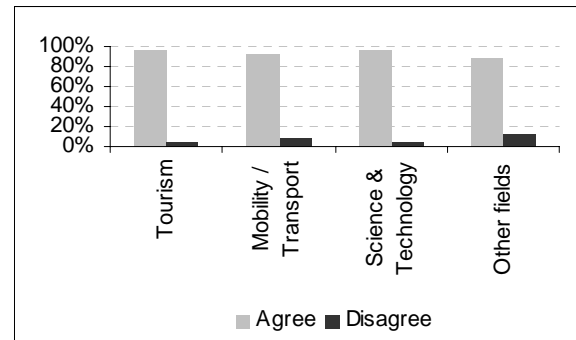
(2) Continent of residence



n = 510

\* less than 10 cases

(3) Interviewees' most important work field



n = 517

(1) The majority of experts agree with the statement (93%).

(2) Most of the experts (worldwide) agree with the statement.

(3) Most of the experts of all fields agree with the statement.

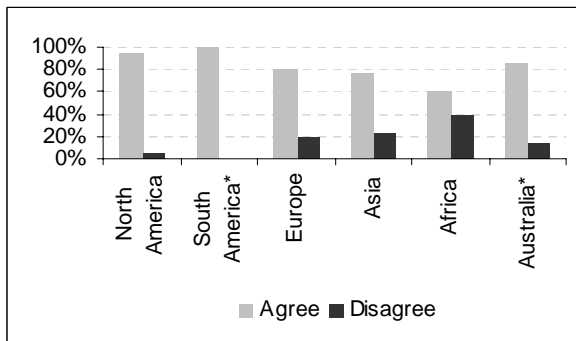
2.5.2.9 Mobile end-user devices – Credit-based payment systems

Question: By 2030, mobile devices will have the following function for travellers in your country: Credit-based payment systems

(1)



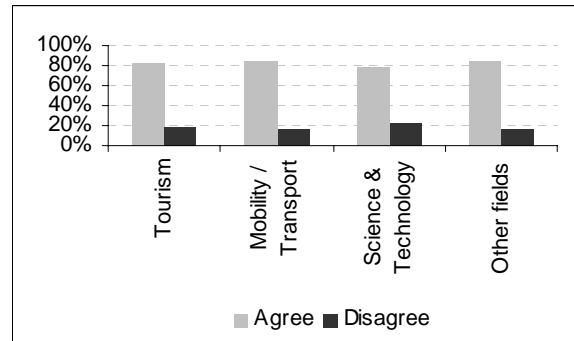
(2) Continent of residence



n = 511

\* less than 10 cases

(3) Interviewees' most important work field



n = 518

(1) The majority of experts agree with the statement (82%).

(2) Most of the experts (worldwide) agree with the statement.

(3) Most of the experts of all fields agree with the statement.

2.5.2.10 Mobile end-user devices – Credit card

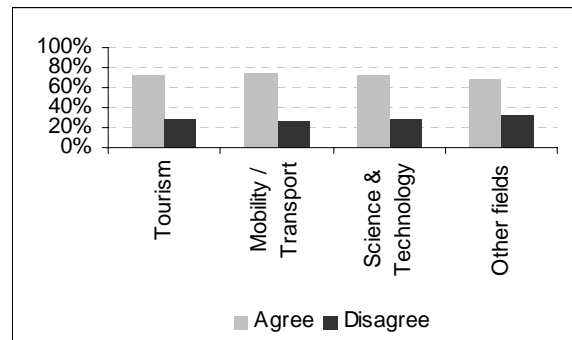
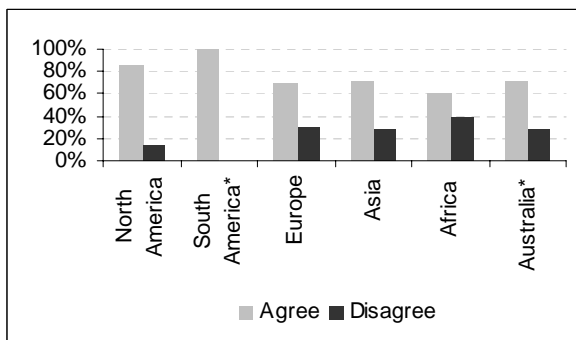
Question: By 2030, mobile devices will have the following function for travellers in your country: Credit card

(1)



(2) Continent of residence

(3) Interviewees' most important work field



n = 510

n = 517

\* less than 10 cases

(1) The majority of experts agree with the statement (73%).

(2) The experts of North America (14%) disagree less than the experts from Europe (30%), Asia (28%) and Africa (39%).

(3) Most of the experts of all fields agree with the statement (around 70%).

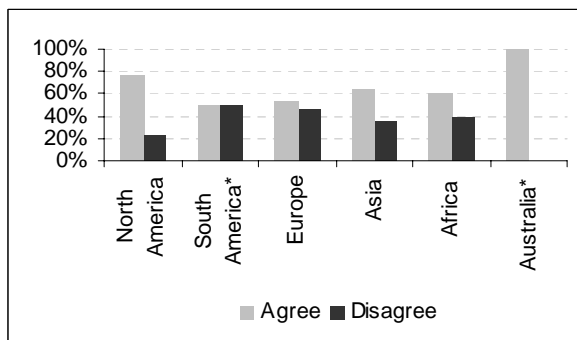
### 2.5.2.11 Mobile end-user devices – Health insurance card

Question: By 2030, mobile devices will have the following function for travellers in your country: health insurance card

(1)



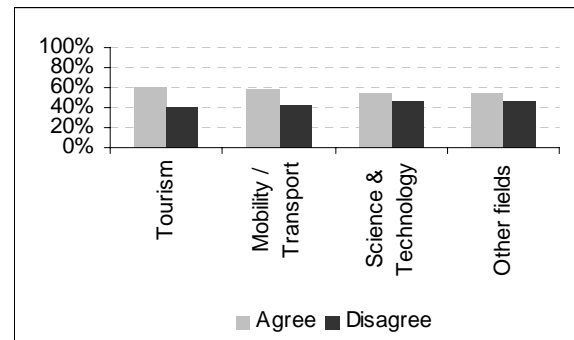
(2) Continent of residence



n = 505

\* less than 10 cases

(3) Interviewees' most important work field



n = 511

(1) The majority of experts agree with the statement (57%).

(2) The majority of experts from all continents agree with the statement.

(3) Tourism experts (56%) agree more than other professions do.

2.5.2.12 Mobile end-user devices – Health monitoring system

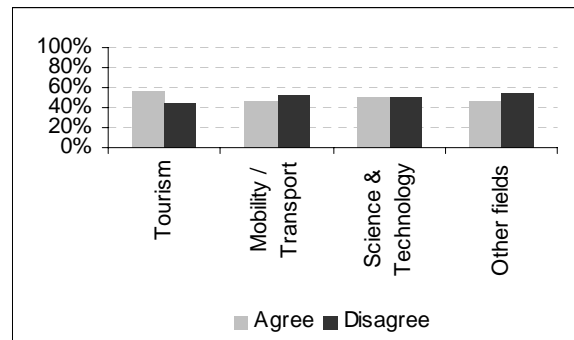
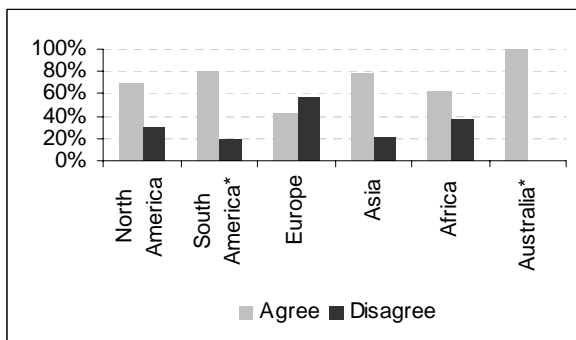
Question: By 2030, mobile devices will have the following function for travellers in your country: Health monitoring system

(1)



(2) Continent of residence

(3) Interviewees' most important work field



n = 505

n = 512

\* less than 10 cases

(1) There is some dissent on this issue. There is no clear result, 51% of the experts disagree with the statement.

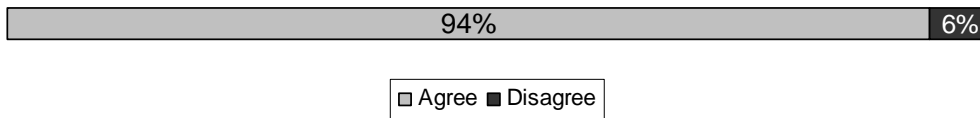
(2) South America (80%) and Asian experts (79%) strongly agree with the statement, while European experts (58%) disagree.

(3) Tourism experts (56%) agree more than other professions do.

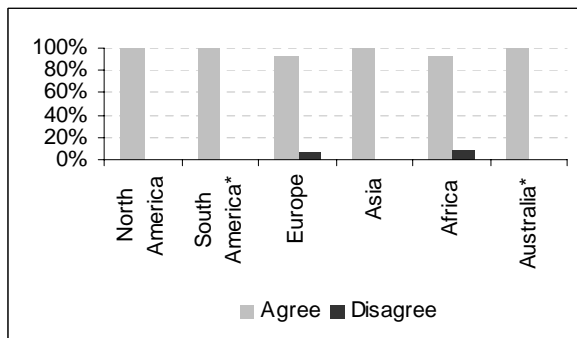
### 2.5.2.13 Mobile end-user devices – Means of booking services

Question: By 2030, mobile devices will have the following function for travellers in your country - Means of booking services

(1)



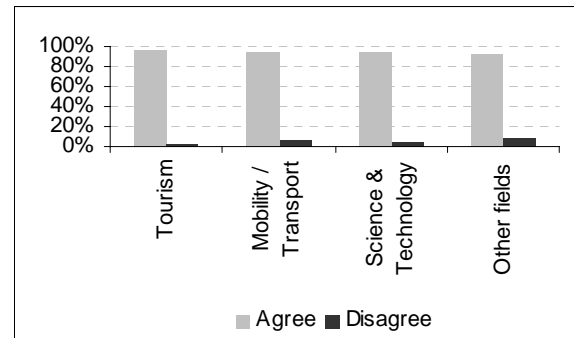
(2) Continent of residence



n = 506

\* less than 10 cases

(3) Interviewees' most important work field



n = 513

- (1) The overall majority of experts strongly agree with the statement (94%).
- (2) All experts have the same opinion and strongly agree with the statement.
- (3) The majority of experts differentiated by their main work field strongly agree with the statement.

### 2.5.2.14 Mobile end-user devices – Identification card

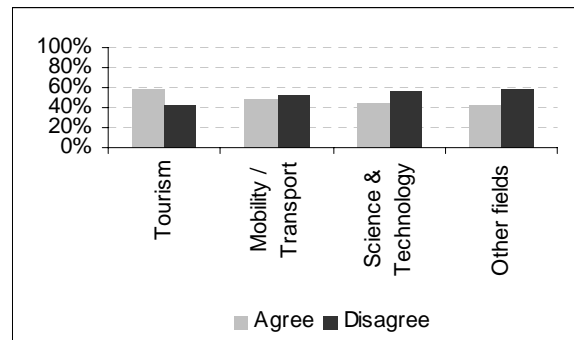
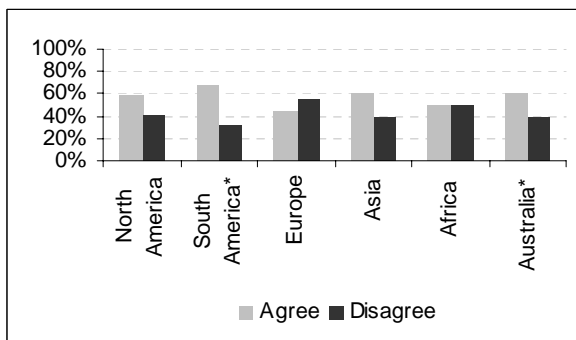
Question: By 2030, mobile devices will have the following function for travellers in your country: Identification card

(1)



(2) Continent of residence

(3) Interviewees' most important work field



n = 506

n = 513

\* less than 10 cases

(1) The overall majority of experts disagree with the statement (53%).

(2) All experts by differentiating the result with regard to the living conditions agree with the statement, except European experts (56%).

(3) Tourism experts (59%) agree more than other professions do.

2.5.2.15 Mobile end-user devices – Real-time translation

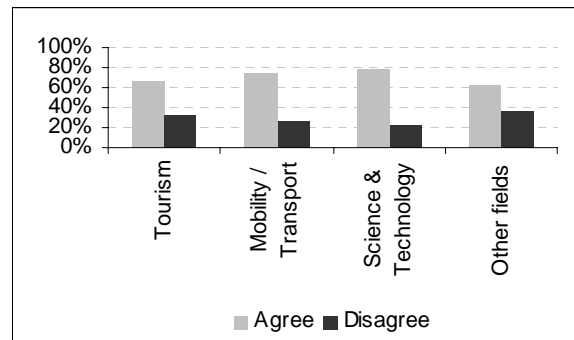
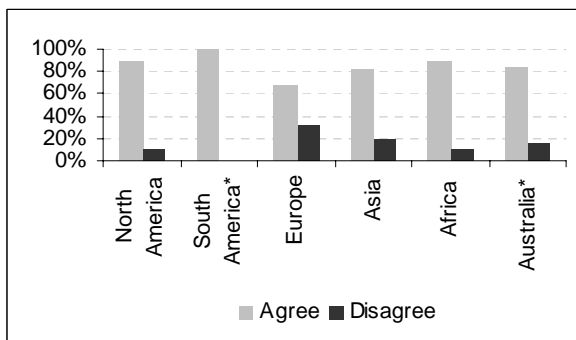
Question: By 2030, mobile devices will have the following function for travellers in your country: Real-time voice recognition and translation device

(1)



(2) Continent of residence

(3) Interviewees' most important work field



n = 510

n = 517

\* less than 10 cases

(1) The majority of experts agree with the statement (73%).

(2) All continents strongly agree with statement except Europe (69%).

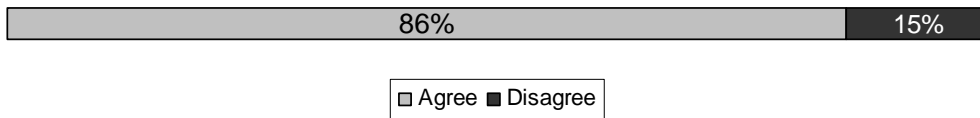
(3) Science & technology (78%) agree more than other professions do.



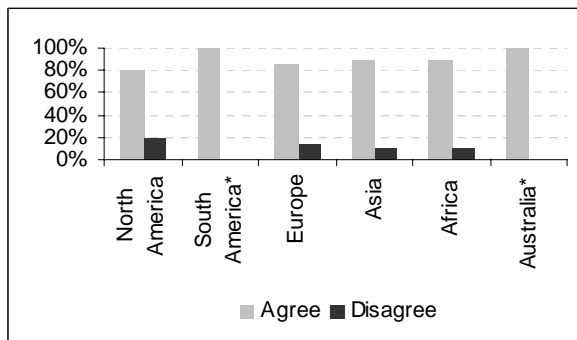
2.5.2.16 Mobile end-user devices – Last-minute reservations (train)

Question: Using the mobile phone for making last-minute reservations will have become the norm for train travel in your country by 2030.

(1)



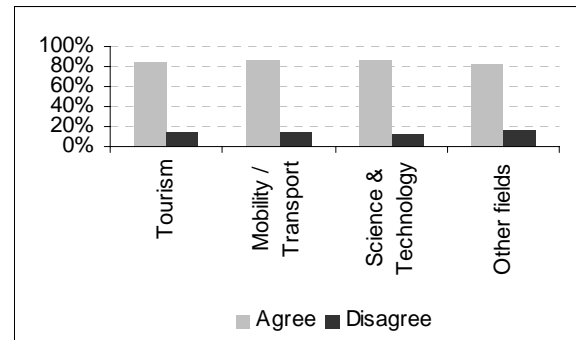
(2) Continent of residence



n = 517

\* less than 10 cases

(3) Interviewees' most important work field



n = 524

(1) The majority of experts strongly agree with the statement (86%).

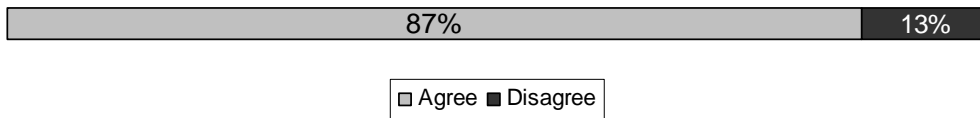
(2) The vast majority of experts from all continents strongly agree that using the mobile phone for making last-minute reservations will have become a norm for train travel.

(3) The majority of experts from all work fields strongly agree with the statement.

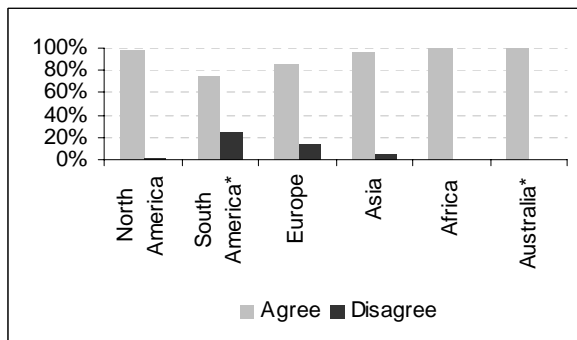
### 2.5.2.17 Luggage Handling - Tracing and tracking

Question: By 2030, tracing and tracking luggage will have become a standard procedure in your country.

(1)



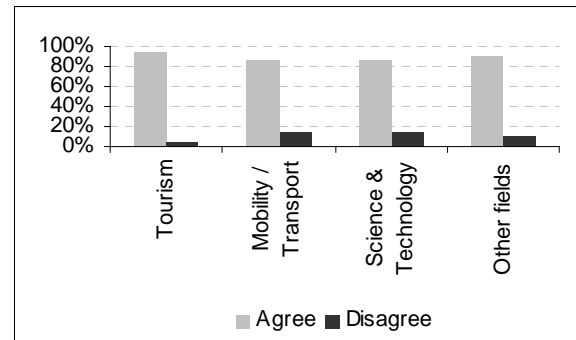
(2) Continent of residence



n = 520

\* less than 10 cases

(3) Interviewees' most important work field



n = 527

(1) The majority of experts strongly agree that tracing and tracking luggage will have become a standard procedure by 2030 (87%).

(2) All experts from all continents strongly agree with the statement. While African, North American and Asian experts almost fully agree (100%; 98%; 96%), European experts agree to a significantly lower extent (85% agreement).

(3) The majority of experts from all work fields strongly agree with the statement.

## 2.6 Society

All results refer to the time horizon “year 2030”. The experts’ responses always refer to their respective country/continent.

### 2.6.1 Key findings

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

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

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

*Details → pages 161, 162, 163.*

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

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

*Details → page 164.*

- **Safety remains an issue.**

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

*Details → page 158.*

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

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

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

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

*Details → page 160, 159.*

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

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

*Details → page 166.*

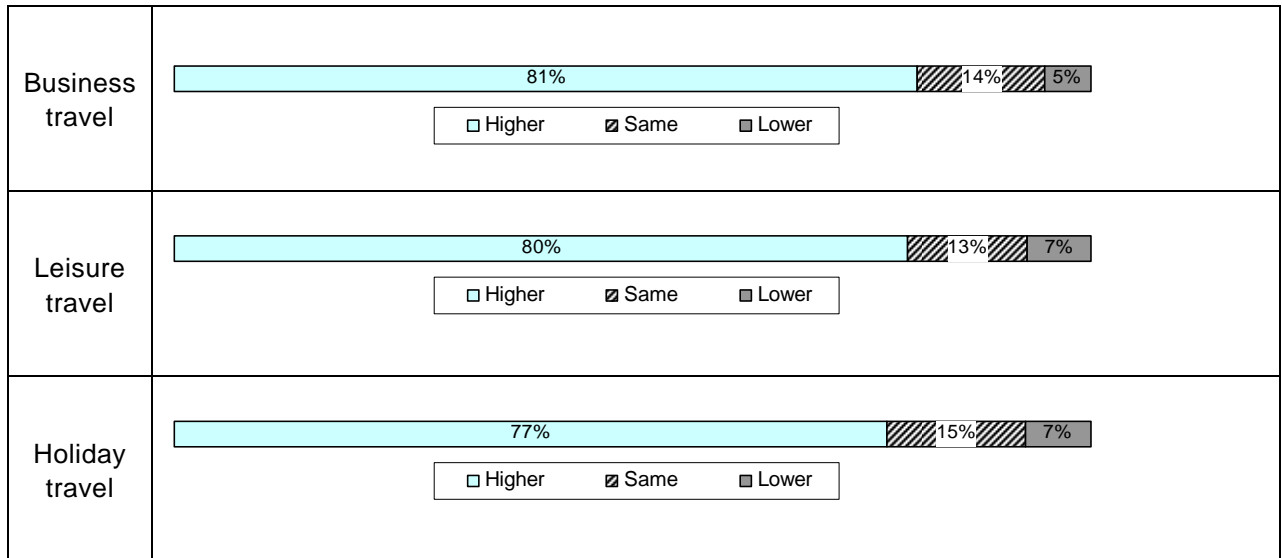
- **High-quality rail service is an important basic provision for the public sector**

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

*Details → page 165.*

## 2.6.2 Comparisons

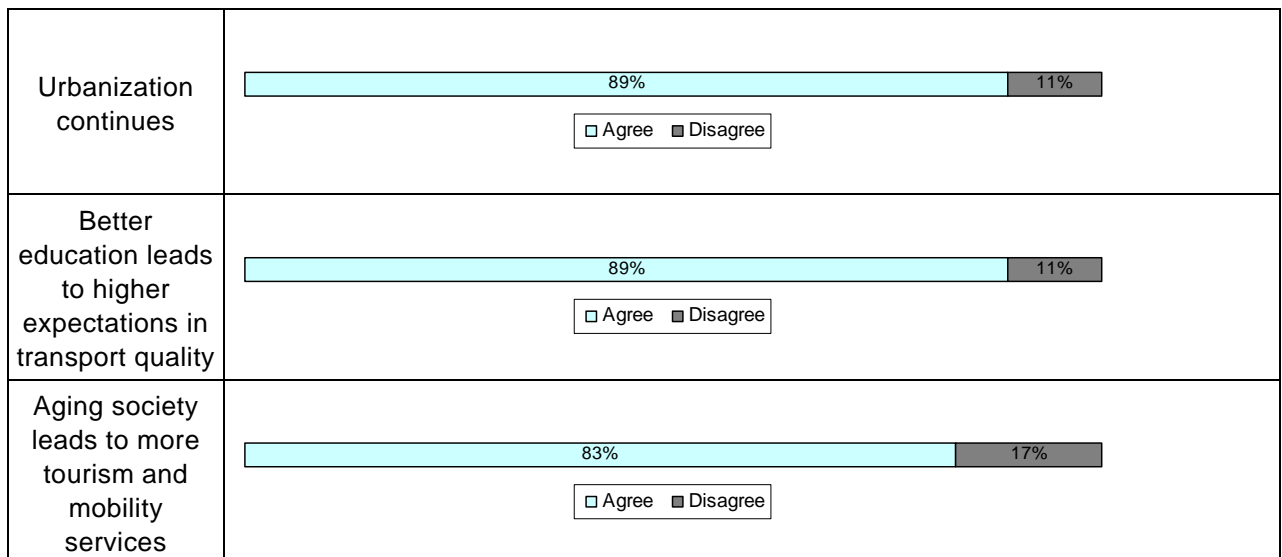
### 2.6.2.1 Average costs of travel & Travel purpose



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

*Details* → pages 161, 162, 163.

### 2.6.2.2 Megatrends' & Impacts



*Details* → pages 169; 167; 168

## 2.6.3 Fact sheets

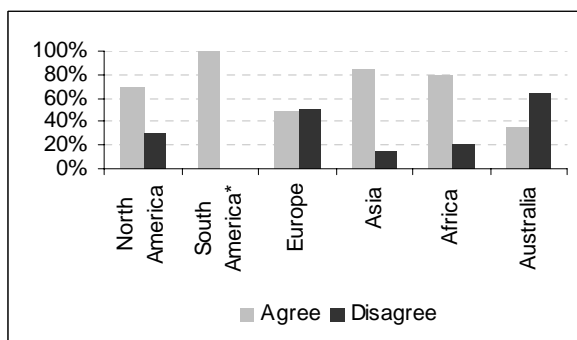
### 2.6.3.1 Safety – perception and appeal of a country

**Question:** By 2030, the appeal of a country as a destination will rely more strongly on the way safety is perceived than on what the country actually has to offer for tourists.

(1)



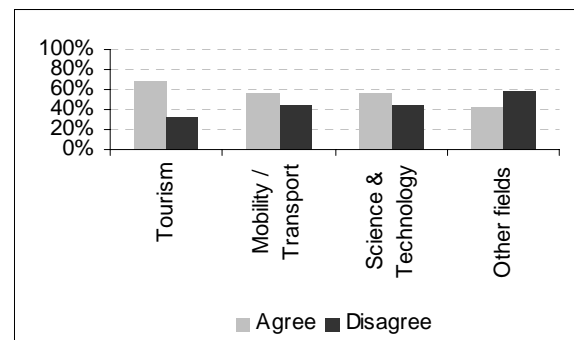
(2) Continent of residence



n = 604

\* less than 10 cases

(3) Interviewees' most important work field



n = 612

(1) The majority of experts agree with the statement (54 %).

(2) A majority of experts in Europe (51 %) and Australia (64 %) disagree with the statement.

(3) Only experts in “other fields” disagree with the statement (59 %).

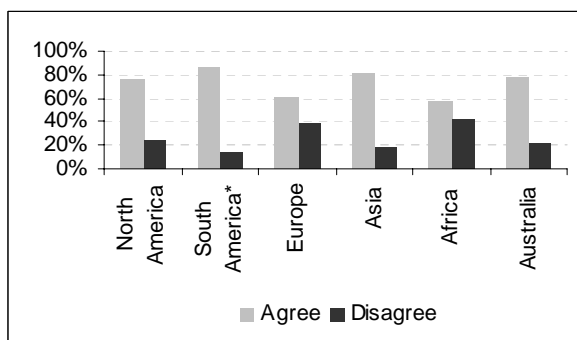
### 2.6.3.2 Safety – Protection against acts of violence and terrorist threats

**Question:** By 2030, your country will have effective measures to protect travellers against acts of violence and terrorist threats.

(1)



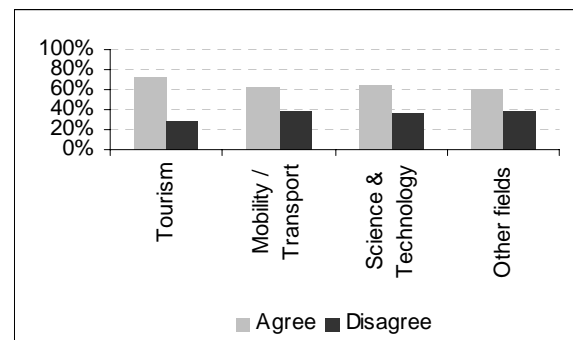
(2) Continent of residence



n = 604

\* less than 10 cases

(3) Interviewees' most important work field



n = 612

- (1) A majority of experts agree that their respective country will have effective measures to protect travellers against acts of violence and terrorist threats (64 %).
- (2) European (61 %) and African experts (57 %) agree less with the statement than experts from other continents.
- (3) Experts in tourism agree more often with the statement (71 %) than all the others do.

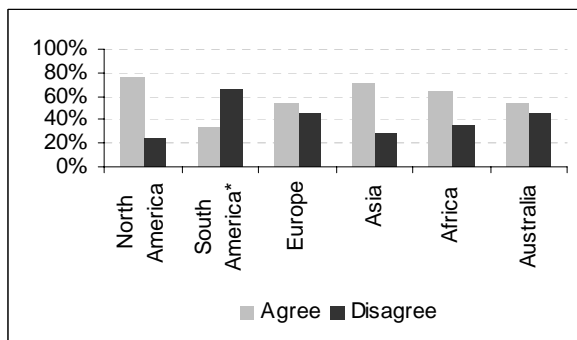
### 2.6.3.3 Data privacy – Reliability of measures

**Question:** By 2030, your country will have reliable data privacy measures in place for all client profiles.

(1)



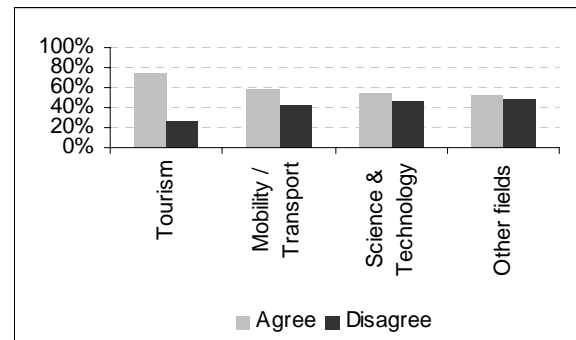
(2) Continent of residence



n = 602

\* less than 10 cases

(3) Interviewees' most important work field



n = 610

(1) A majority of experts agree with the statement (58 %).

(2) Experts living in North America agree more often with the statement (77 %) than other experts do. European experts agree significantly less often (55 %).

(3) Experts working in tourism agree more often with the statement (74 %) than others do.



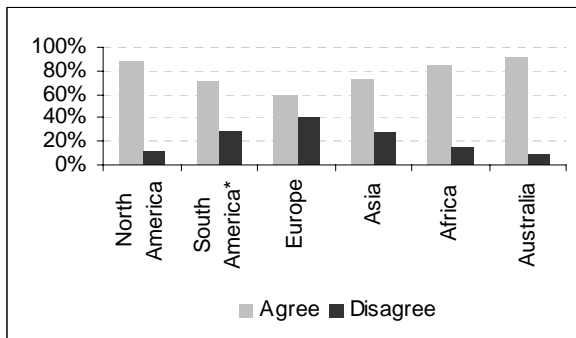
### 2.6.3.4 Data privacy – Profiling

**Question:** By 2030, the citizens of your country will disclose their personal travel and mobility preferences routinely to private travel providers when requesting personalized travel services.

(1)



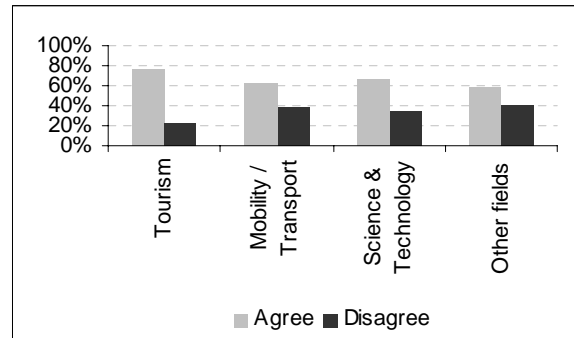
(2) Continent of residence



n = 599

\* less than 10 cases

(3) Interviewees' most important work field



n = 607

(1) The majority of experts agree with the statement (64 %).

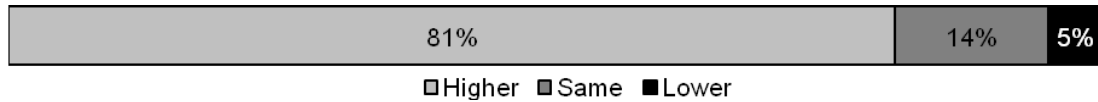
(2) Australian and North American experts strongly agree (91%; 88%). Experts from Europe agree less often with the statement (59 %) than experts from other continents.

(3) Experts working in tourism agree more often with the statement (77 %) than all others do.

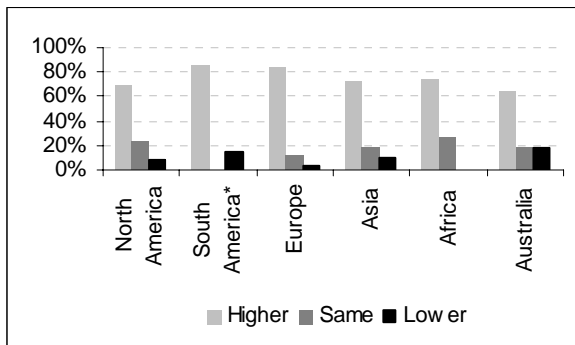
2.6.3.5 Travel costs – Business travel

**Question:** How will average travel costs (adjusted for inflation) for citizens of your country have changed by 2030? For business travel

(1)



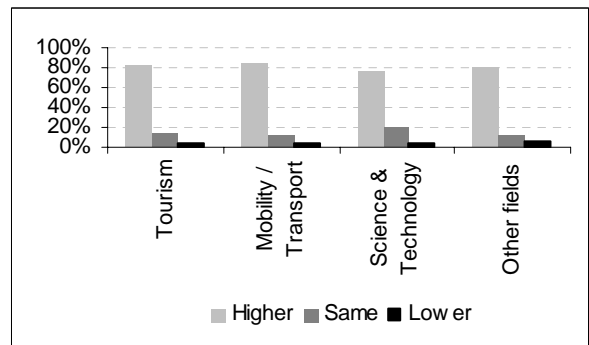
(2) Continent of residence



n = 598

\* less than 10 cases

(3) Interviewees' most important work field



n = 606

(1) 81% of all experts believe that the average costs for business travel will be higher.

(2) A vast majority of experts throughout all continents thinks the average costs for business travel will be higher.

(3) The majority of experts working in all working fields think the average costs for business travel will be higher.

### 2.6.3.6 Travel costs – Leisure travel

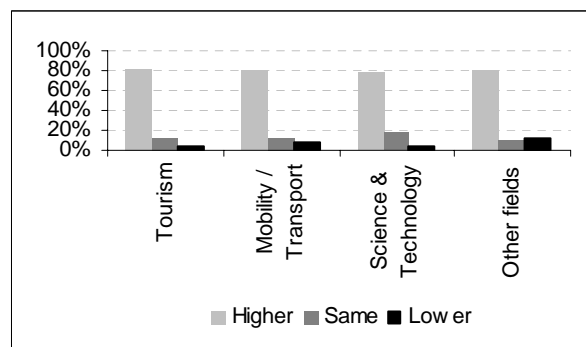
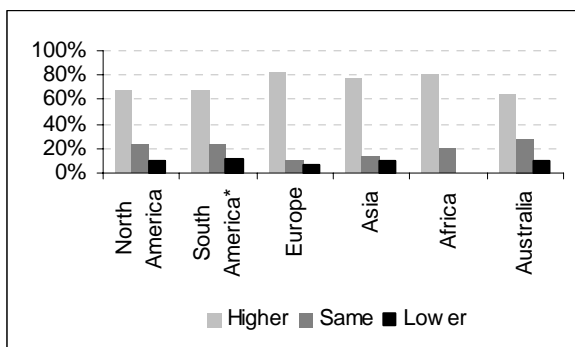
**Question:** How will average travel costs (adjusted for inflation) for citizens of your country have changed by 2030?" For leisure travel

(1)



(2) Continent of residence

(3) Interviewees' most important work field



n = 599

n = 607

\* less than 10 cases

- (1) The majority of experts (80 %) expect that the average costs for leisure travel will be higher.
- (2) Experts in Europe (82 %), Asia (77 %) and Africa (80 %) expect more often that the average costs for leisure travel will be higher, compared to experts from Australia (64%) and North America (67%).
- (3) Most experts from all working fields expect that the average costs for leisure travel will be higher in 2030.

### 2.6.3.7 Travel costs – Holiday travel

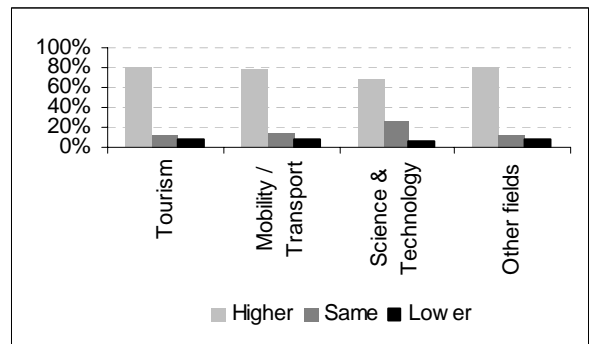
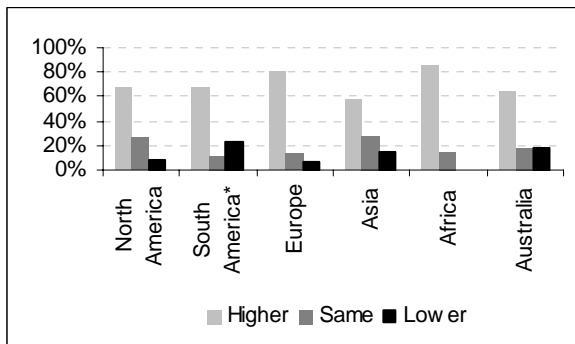
**Question:** How will average travel costs (adjusted for inflation) for citizens of your country have changed by 2030?" For holiday travel

(1)



(2) Continent of residence

(3) Interviewees' most important work field



n = 599

n = 607

\* less than 10 cases

- (1) A majority of experts expect that the average costs for holiday travel will be higher (77 %) than now.
- (2) Experts from Europe (80 %) and Africa (85 %) agree more often that the average costs for holiday travel will be higher than experts from other continents.
- (3) Science & technology experts believe less often that the average costs for holiday travel will be higher (68 %) than all others.

### 2.6.3.8 Internalization of external costs

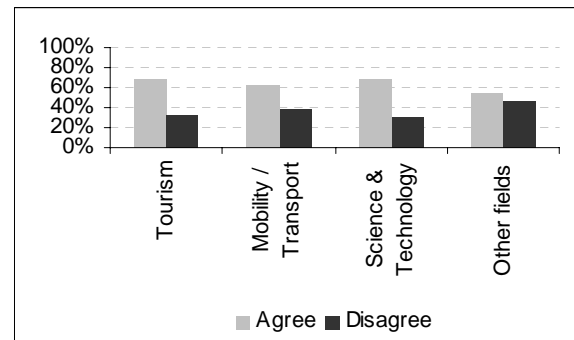
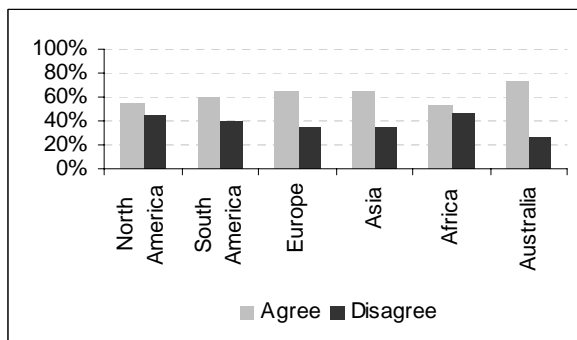
**Question:** By 2030, the external costs (externalities) of travel will largely have been integrated in the price of transportation.

(1)



(2) Continent of residence

(3) Interviewees' most important work field



n = 667

n = 675

(1) A majority of experts (63%) agree that the external costs (externalities) of travel will largely have been integrated in the price of transportation by 2030.

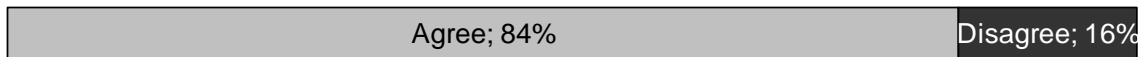
(2) 73% of the Australian and 65% of the Asian experts agree with the statement that the external costs (externalities) of travel will largely have been integrated in the price of transportation. In comparison just 56% of the North American experts agree.

(3) 69% of the science and technology experts agree with this statement.

### 2.6.3.9 Public transport – Role of public sector

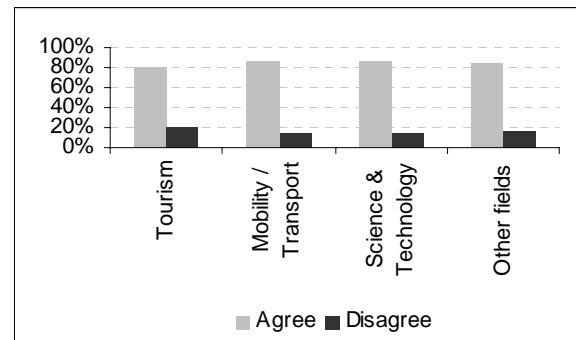
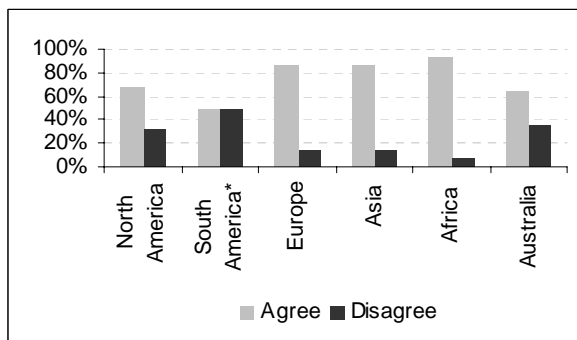
**Question:** By 2030, offering efficient high-quality rail service will be seen as an important basic provision by the public sector of your country.

(1)



(2) Continent of residence

(3) Interviewees' most important work field



n = 604

n = 612

\* less than 10 cases

(1) The majority of experts agree with the statement (84 %).

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

(3) The majority of experts in all working fields agree with the statement (around 80 %).

### 2.6.3.10 Time budget for leisure travel

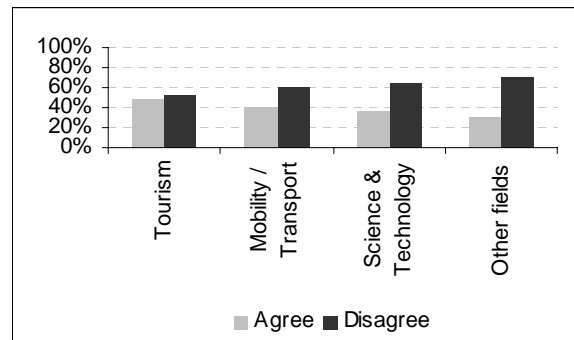
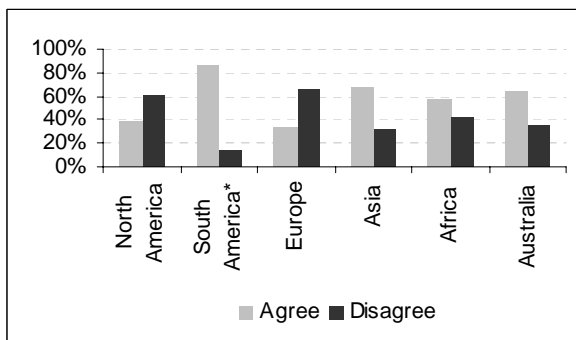
**Question:** By 2030, the people of your country will, on average, have significantly more time available for leisure travel than they do today.

(1)



(2) Continent of residence

(3) Interviewees' most important work field



n = 603

n = 611

\* less than 10 cases

(1) 62 % of all experts disagree with the statement that people will have more time available for leisure travel than they have today.

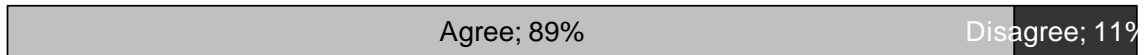
(2) The majority of experts from Asia (68%), Australia (64%) and Africa (57%) agree that people in their countries will have more time available for leisure travel than they have today. The Experts from North America (61 %) and Europe (67 %) disagree with the statement.

(3) Experts in tourism disagree less often (53 %) than experts in other working fields.

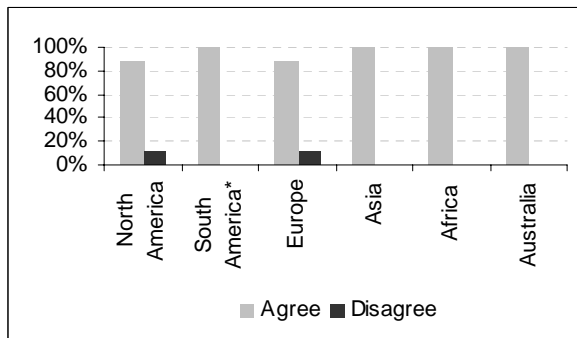
2.6.3.11 Megatrends – Education – Service quality expectations

**Question:** As levels of education rise, people of your country will also have higher expectations by 2030 when it comes to service quality in tourism and mobility.

(1)



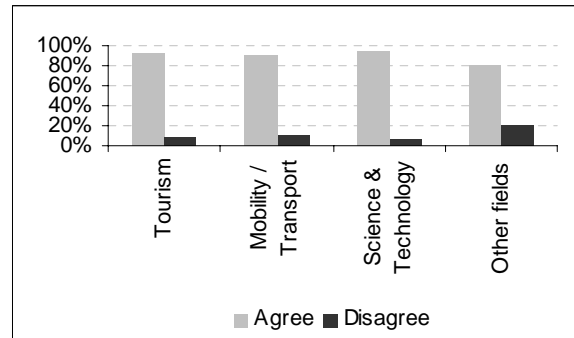
(2) Continent of residence



n = 601

\* less than 10 cases

(3) Interviewees' most important work field



n = 609

(1) The majority of experts (89 %) agree with the statement.

(2) Most experts from all continents agree. Only a slim minority of experts in North America (11 %) and Europe (12 %) disagree with the statement.

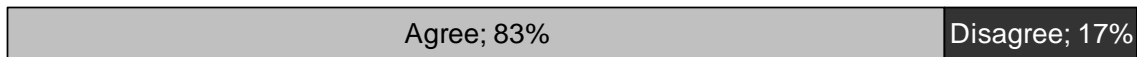
(3) Experts in “other fields” disagree more often with the statement (19 %) than all others do.



2.6.3.12 Megatrends – Aging society – Tourism and mobility services

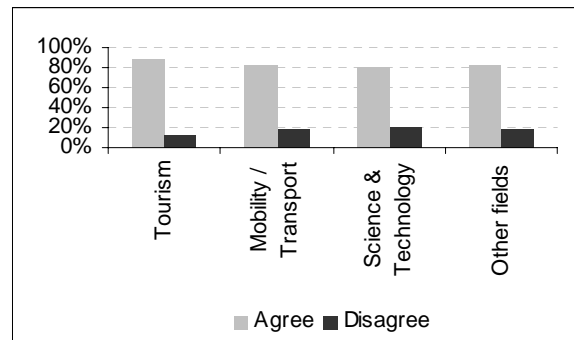
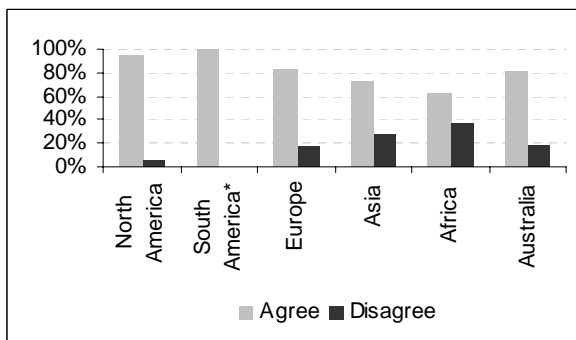
**Question:** By 2030, your country will have a broad range of tourism and mobility services, especially for people with disabilities (seeing, walking).

(1)



(2) Continent of residence

(3) Interviewees' most important work field



n = 601

n = 609

\* less than 10 cases

(1) Most experts agree with the statement (83 %).

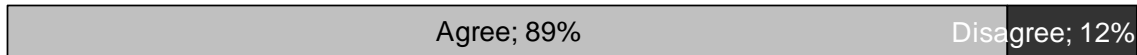
(2) Experts in Africa agree less often with the statement (62 %) than experts from other continents. North American (95%) and European (82%) experts agree most often.

(3) Experts in tourism agree more often with the statement (89 %) than others experts.

### 2.6.3.13 Megatrends – Urbanization

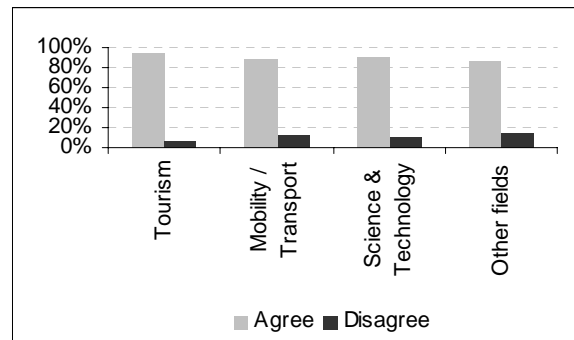
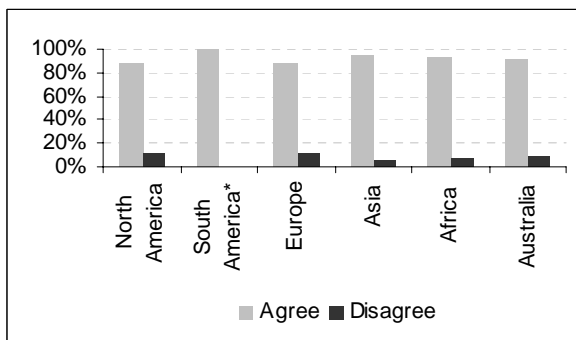
**Question:** All in all, urbanization (growth and rise of importance of cities) will continue in your country to the year 2030.

(1)



(2) Continent of residence

(3) Interviewees' most important work field



n = 603

n = 611

\* less than 10 cases

(1) The majority of experts agree with the statement (89 %) that urbanization trends will continue to the year 2030.

(2) The majority of experts from all continents agree. North America (88 %) and Europe (88 %) agree less often than experts from other continents.

(3) Experts in tourism agree more often with the statement (93 %) than other experts do.

### 3 Conclusions

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

The opportunity to have time for one's self and have control over one's own time will be of high relevance and an important travel motivator when it comes to holiday travel.

Equally “Time for the partner and family” will continue to be a highly relevant travel motivator. Making use of one’s time to have intercultural experiences, to broaden one’s horizon and to gain knowledge will continue to be an important travel motivator. In Asia and Australia, these travel motivators will be especially relevant.

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

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

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

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

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

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

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

## 4 Appendices

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## 4.1.2 Calls for participation

### 4.1.2.1 Personalized invitation letter (English Email-Version)

Dear #Title# # first name# # last name#,

Experts are currently discussing which technological and sociological trends – as well as which underlying psychological dimensions – are likely to determine the future of and leisure-travel, mobility and tourism. While some developments seem relatively easy to identify already today, others remain nothing more than vague prophecies.

In view of this, the Lucerne University of Applied Sciences has launched a research project that includes an international online survey of expert opinions as a major research component.

This survey is 100% scientific and financed by the Lucerne University of Applied Sciences, ITW Institute.

The study is free from any commercial interference by third parties. There is no advertisement either.

We would be pleased if you would contribute by sharing your expertise on this topic. We will gladly send you an overview of the relevant research results as a file in PDF.

The following link will take you to the online survey:

# personalized weblink #

You will find additional details (e.g. on data privacy) on the start page.

Thank you for your interest.

We would be glad to answer any further questions you may have.

Best regards,

[...]

# Signature #

About this e-mail / unsubscribe:

We are committed to sending only targeted information by e-mail. We do not support the use of spam on the Internet. For this reason, we ask anyone who is not interested in the information we send to reply to this message by putting "unsubscribe" in the subject line and return it to: [mobility2030@hslu.ch](mailto:mobility2030@hslu.ch)



#### 4.1.2.2 Personalized Reminder (English Email-Version)

Dear #Title# # first name# # last name#,

We sent you an e-mail several days ago asking you to participate in our international online survey "Mobility in 2030".

We hereby would like to ask you again for a few minutes of your time to complete the questionnaire, which you can access via this link:

# Personalized weblink #

Your feedback is important to us; your name has been carefully selected on account of your expertise in the field.

Thank you very much for your co-operation.

Best regards,

[...]

# Signature #

About this e-mail / unsubscribe:

We would like to thank all recipients for reading this message. We are committed to sending only targeted information by e-mail. We do not support the use of spam on the Internet. For this reason, we ask anyone who is not interested in the information we send to reply to this message by putting "unsubscribe" in the subject line and return it to: mobility2030@hslu.ch

#### 4.1.2.3 Newsletter Invitation in cooperation with “Cities for Mobility”

The following newsletter was sent out by the “Cities for Mobility” Network to its members and subscribers on February 10<sup>th</sup>, 2009.

*German translation below -*

Dear members and friends of Cities for Mobility,

Interdisciplinary experts are currently discussing which technological and sociological trends – and their underlying psychological dimensions – are likely to determine the future of mobility for business and leisure travel. While some developments seem relatively easy to identify today, others remain nothing more than vague predictions.

In view of this, the Lucerne School of Business, ITW, has launched a research project that includes an **international online survey of professional opinions** as one major component. The “Cities for Mobility” network, which is being coordinated by Stuttgart, supports this worldwide survey with the aim of enabling its members to participate in the research project and thus to broaden the basis for gathering data.

The **Lucerne School of Business, ITW, and “Cities for Mobility”** would be pleased if you would contribute to the quality of the survey results by sharing your expertise on this topic. We will gladly send you an overview of the relevant research results as a PDF file, too.

The **following link will take you to the online survey:**

[www.unipark.de/uc/ITW/6c71/](http://www.unipark.de/uc/ITW/6c71/)

You will find additional important details (e.g., on data privacy) on the start page.

Thank you for your interest.

We would be glad to answer any further questions you may have.

“Cities for Mobility”-Network Member  
Lucerne School of Business,  
ITW Institute, CCM  
Lucerne, Switzerland  
Dr. Johannes Klühspies  
Email: [johannes.kluehspies@hslu.ch](mailto:johannes.kluehspies@hslu.ch)  
Contact: 0041-41-2289961

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Liebe Freunde und Mitglieder von Cities for Mobility,

Stadtplaner, Verkehrsplaner, Geographen, Ingenieure und mehrere weitere Disziplinen diskutieren derzeit weltweit, welche technologischen, mobilitätspsychologischen und soziologischen Trends die Mobilität in Zukunft prägen werden.

Die Hochschule Luzern – Wirtschaft, ITW, untersucht mögliche Entwicklungen in einem speziellen Forschungsprojekt. Wesentlicher Bestandteil ist eine **internationale Expertenumfrage via Internet**. Das von der Landeshauptstadt Stuttgart koordinierte Städtenetzwerk „Cities for Mobility“ unterstützt diese weltweite Umfrage, um eine Beteiligung der Netzwerkmitglieder an diesem internationalen

Forschungsprojekt zu ermöglichen und dadurch eine breitere Datengrundlage zu erzielen.

Die **Hochschule Luzern –Wirtschaft (ITW Institute) und „Cities for Mobility“** freuen sich, wenn Sie Ihr Expertenwissen in diese Umfrage zu diesem wichtigen Thema einbringen.

Über **die folgenden Links gelangen Sie zur Online Umfrage:**

Deutsch: [www.unipark.de/uc/ITW/daf0/](http://www.unipark.de/uc/ITW/daf0/)

English: [www.unipark.de/uc/ITW/6c71/](http://www.unipark.de/uc/ITW/6c71/)

Als Teilnehmer erhalten Sie eine Übersicht relevanter Ergebnisse als PDF zugesandt.  
Weitere wichtige Hinweise finden Sie auf der Startseite der Umfrage.

Vielen Dank für Ihr Interesse.

Für Fragen stehen wir Ihnen gern zur Verfügung.

“Cities for Mobility”-Network Member

Lucerne School of Business,

ITW Institute , CCM

Lucerne, Switzerland

Dr. Johannes Klühspies

Email: [johannes.kluehspies@hslu.ch](mailto:johannes.kluehspies@hslu.ch)

Contact: 0041-41-2289961

Disclaimer:

The network Cities for Mobility supports the project of the University of Lucerne, Switzerland. We herewith forward the University's inquiry requesting that you participate in this survey. You are free to participate in the survey. The University of Lucerne has assured us that all personal information is treated strictly confidentially and will be used appropriately in accordance with the purpose of the survey. All data will be destroyed as soon as the results of the survey have been evaluated. The City of Stuttgart is not involved neither in the subject matter of the survey nor in the collection, processing or use of the data. If you have any questions, please contact directly the University of Lucerne.

Das Netzwerk Cities for Mobility unterstützt das Vorhaben der Hochschule Luzern und leitet deshalb die Bitte um freiwillige Teilnahme an der Umfrage an Sie weiter. Die Hochschule Luzern hat uns versichert, dass alle personenbezogenen Daten nur zweckgebunden verwendet und unverzüglich nach Ende der Auswertung gelöscht werden. Die Landeshauptstadt Stuttgart ist nicht mit dem Inhalt der Umfrage sowie der Erhebung, Verarbeitung und Nutzung der Daten im Rahmen der Umfrage befasst, Fragen sind deshalb direkt an die Hochschule Luzern zu richten.

## 4.2 The English Questionnaire



### **"Mobility in 2030"**

Thank you for your interest to participate in this research project.

#### **How do you imagine the future of mobility up to 2030?**

Discussions on mobility and leisure travel continue to focus on development trends. But when it comes down to it, how realistic are these trends? And what proof or indicators exist that may shed light on what really lies in store?

#### **Our statements – your opinions**

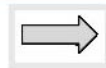
We have prepared a range of statements on current topics for you to consider. We would be pleased if you would evaluate them from the perspective of your field. At your request, we'll gladly send you an overview of relevant research results as a file in PDF.

#### **Data privacy**

All responses will be treated as confidential. All data we obtain is treated anonymously and pooled before it is analyzed. This means it is impossible to trace individual responses to the statements.

**Thank you for your time and interest.**

Lucerne School of Business, Competence Center of Mobility, ITW  
Dr. Johannes Kluehspies - johannes.kluehspies@hslu.ch



#### **Mobility 2030: How to use this survey**

\* **You can navigate** in the survey using the "Back" and the "Next" buttons.

\* **You can skip any question** that is irrelevant to your situation.

This, however, does not apply to the structural questions, which always have a *yellow* image in the header, *the same one you see on the top of this page*. Here, we are counting on your input in order to be able to analyze the responses in a meaningful way.

\* **There are six topic areas.**

We estimate that answering each area will require between 3 and 5 minutes of your time. You can skip any area that is irrelevant to your situation.





**Mobility 2030: Three questions about you ...**

"In which field do you mainly work?"

Science

Private company

Association / club / NGO

Public administration

In training / student

Other

No response



**Mobility 2030: Three questions about you ...**

"Which field is most important to you in terms of its content?"

Tourism

Mobility / transport

Technology

Society

Science

Other fields





### Mobility 2030: Three questions about you ...

"Please choose your country"

Australia
Togo
Tonga
Trinidad and Tobago
Tunisia
Turkey
Turkmenistan
Tuvalu
Uganda
Ukraine
United Arab Emirates
United Kingdom
<b>United States of America (USA)</b>
Uruguay
Uzbekistan
Vanuatu
Venezuela
Vietnam
Yemen
Zambia
Zimbabwe



"Push the button!"- Sign in a commuter train, Munich, Germany 2009.

### Mobility 2030 --TOPIC--SELECTION--

Please choose a topic you are particularly interest in:

- Environment and ecology
- Society
- Supply and demand
- Transportation systems
- Information and communication technologies
- Individual interests & motives
- Quit the survey





Cruise Ship in San Francisco Bay, Alcatraz Island, USA 2008

**Mobility 2030: Supply and demand**

"The consequences of climate change will have no negative impact on demand for cruises by 2030."

- Fully agree
- Agree somewhat
- Disagree
- Completely disagree
- Don't know
- Not relevant for my country

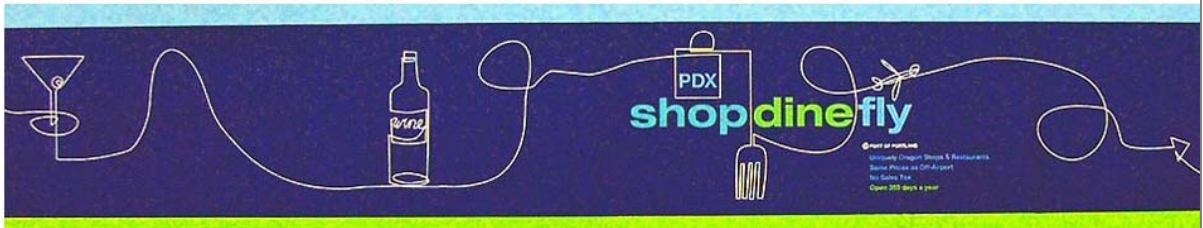


Hankyu Railway Advertisement (Detail), Kyoto, Japan, 2007.

**Mobility 2030: Supply and demand**

"How will the importance of the following services change for clients in your country by 2030?"

	Importance increases	Unchanged	Importance decreases	Don't know/ Not relevant for my country
Booking trips through travel agencies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Online travel communities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Internet-based hotel ratings by clients	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Live travel information via mobile phone	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Personalized travel information based on individual customer profiles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Privacy zones, lounges	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dynamic packaging (individual combination of trip components)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



Detail of a Wall Painting in Portland Int. Airport. USA 2008

### Mobility 2030: Supply and demand

"In the case of all-inclusive packages, how will the importance of the following services change for clients in your country by 2030?"

	Importance increases	Unchanged	Importance decreases	Don't know/ Not relevant for my country
Free-of-charge shuttle service for passengers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Free-of-charge luggage service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Free-of-charge use of a car	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Free-of-charge use of media (internet, print media, TV)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Stronger security services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Free-of-charge use of fitness and wellness services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



Detail of a PT Map on a Display Panel in Beijing. PR China, 2006.

### Mobility 2030: Supply and demand >

"By 2030, navigation service providers in your country will require payment for including company listings in their navigation charts."

- Fully agree
- Agree somewhat
- Disagree
- Completely disagree
- Don't know
- Not relevant for my country







Info-Sign in an 1980's Airplane

**Mobility 2030: Supply and demand**

"By 2030, the attractiveness of many top destinations today will have become overshadowed by other regions around the world."

- Fully agree
- Agree somewhat
- Disagree
- Completely disagree
- Don't know



Economy Class Passenger Cabin, Airbus A380. Photo Courtesy of EADS, 2008.

**Mobility 2030: Supply and demand**

"By 2030, frequent-user discounts on trains and airlines will have become illegal due to stricter environmental regulations."

- Fully agree
- Agree somewhat
- Disagree
- Completely disagree
- Don't know
- Not relevant for my country





# Check-in 1+2

Zurich Airport, 2008.

## Mobility 2030: Support & Demand

"By 2030, will people in your country choose the following destinations for holiday trips (more than 4 overnight stays) more frequently or less frequently than they do today?" (Part 1)

	More frequently	Unchanged	Less frequently	Don't know	Not relevant for my country
The ocean	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mountains	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Altogether: regional destinations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Altogether: Long-haul destinations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Major cities, conurbations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



Last minute offers at a western european airport, Western Europe, 2008.

## Mobility 2030: Support & Demand

"By 2030, will people in your country choose the following destinations for holiday trips (more than 4 overnight stays) more frequently or less frequently than they do today?" (Part 2)

	More frequently	Unchanged	Less frequently	Don't know	Not relevant for my country
Africa	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Asia	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Europe	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
North America	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
South America	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Oceania, Australia	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



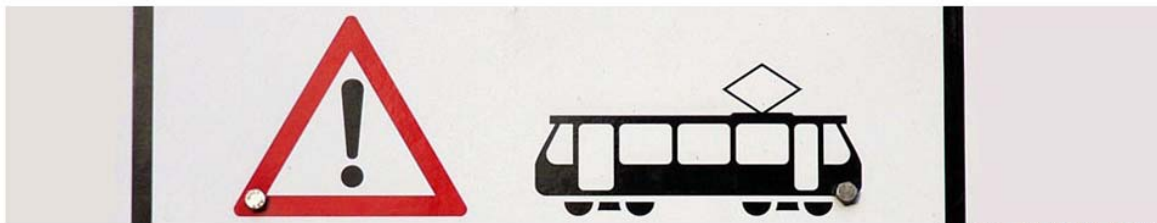


Paris, France, 2006.

### Mobility 2030: Support & Demand

"By 2030, rail service in your country will have largely shifted away from rural regions and instead be concentrated primarily on the densely populated regions and transit corridors."

- Fully agree
- Agree somewhat
- Disagree
- Completely disagree
- Don't know
- Not relevant for my country



Dresden, Germany, 2007.

### Mobility 2030: Support & Demand

"The hospitality industry in your country has generally been underestimating the importance of "good connections to public transportation" as a criterion used by guests when choosing a hotel."

- Fully agree
- Agree somewhat
- Disagree
- Completely disagree
- Don't know
- Not relevant for my country





Berlin Central Station. Germany, 2008.

**Mobility 2030: Support & Demand**

"In general, how do you think travel demand in your country will have changed by 2030?"

	Increase	Unchanged	Decrease	Don't know	Not relevant for my country
Private excursions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Private short trips (1 to 3 overnight stays)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Holiday trips (4 or more overnight stays)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
One-day business trips	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Short business trips (1 to 3 overnight stays)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Business trips (4 or more overnight stays)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



Info Sign, Munich Subway, Germany, 2008.

**Mobility 2030: Support & Demand**

"How would you rate your knowledge of these topics?"

- I know relatively little
- I have general knowledge
- I know a lot about many of these aspects
- I'm a specialist or a professional who works in this field
- No reply



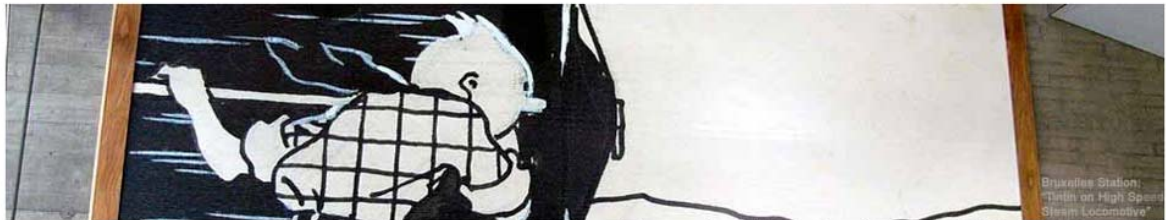


"Push the button!"- Sign in a commuter train, Munich, Germany 2009.

**Mobility 2030 --TOPIC--SELECTION--**

Please choose a topic you are particularly interest in:

- Environment and ecology
- Information and communication technologies
- Society
- Individual interests & motives
- Transportation systems
- Quit the survey



"Tintin in America" - a wall painting in Bruxelles Central Station, Belgium, 2007.

**Mobility 2030: Individual interests & motives**

"By 2030, people in your country will regard virtual worlds as highly attractive, to the point that they will travel significantly less."

- Fully agree
- Agree somewhat
- Disagree
- Completely disagree
- Don't know
- Not relevant for my country





Morning rush hour, Beijing, PR China, 20

**Mobility 2030: Individual interests & motives**

"By 2030, how important do you think fair travel (concern for ecological and ethical aspects) will have become for people in your country when it comes to planning and selecting trips?"

	Very important	important	Not really important	Irrelevant	Don't know	Not relevant for my country
In the case of business trips	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
In the case of personal trips	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



Street Sign, Vienna, Austria, 2008.

**Mobility 2030: Individual interests & motives**

"How do you think the importance of the following travel motivators will have changed in your country by 2030?" (Part 1)

	Increased	Unchanged	Decreased	Don't know / irrelevant for my country
Time for the partner and family	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Time for one's self, having control over one's own time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Experiencing nature and the outdoors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Learning, broadening horizons	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Romantic experiences	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Nightlife	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Spontaneous, flexible decisions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
To be pampered	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Intercultural experiences	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



Street Sign, Milano, Italy, 2008.

**Mobility 2030: Individual interests & motives**

"How do you think the importance of the following travel motivators will have changed in your country by 2030?" (Part 2)

	Increased	Unchanged	Decreased	Don't know / irrelevant for my country
Preventive health tourism	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Health tourism for rehabilitation purposes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Classical beach holidays (sun and beach)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Active sports trips (forms of human powered mobility)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Event tourism (sport, show, concert, culture)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Trips for learning and gaining knowledge	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Traditional winter sport holidays (sun and snow)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MICE (meetings, incentives, conventions, events) business trips	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



Alley at Tiananmen Square, Beijing, China, 2006.

**Mobility 2030: Individual interests & motives**

"Low-speed forms of mobility, e.g. hiking or biking will have become very important for the people in your country by 2030."

Fully agree

Agree somewhat

Disagree

Completely disagree

Don't know

Not relevant for my country





Zurich Central Station, Switzerland, 2008.

**Mobility 2030: Individual interests & motives**

"Cleanliness of public transportation systems and train stations will have a strong impact on the acceptance of public transportation in your country by 2030."

- Fully agree
- Agree somewhat
- Disagree
- Completely disagree
- Don't know
- Not relevant for my country



Detail of Oakland Bay Bridge, San Francisco, USA 2008.

**Mobility 2030: Individual interests & motives**

"By 2030, how will the importance of the following factors have changed for people in your country when it comes to choosing a means of transportation?"

	Importance will increase	Importance will remain the same	Importance will decrease	Don't know / irrelevant for my country
Prestige of the means of transportation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Comfort of the means of transportation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Safety / low risk of accident	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ensuring privacy, not getting disturbed (security)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Environmentally friendly means of transportation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>







Detail of an Old Shinkansen Train Destination Indicator, Japan, 2007.

**Mobility 2030: Individual interests & motives**

"By 2030, how will the importance of the following factors have changed for people of your country when it comes to using a means of public transportation?"

	Importance will increase	Importance will remain the same	Importance will decrease	Don't know / irrelevant for my country
Travel time (door-to-door)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Frequency of schedule	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Flexibility of use	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Transferability of ticket	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Difference / separation between first class and second class	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



Duesseldorf Airport, Germany, 2008.

**Mobility 2030: Individual interests & motives**

"Being able to take pets on trips using public transportation will be of great importance to people of your country in 2030."

Fully agree

Agree somewhat

Disagree

Completely disagree

Don't know

Not relevant for my country





Info Sign, Munich Subway, Germany, 200

**Mobility 2030: Individual interests & motives>**

"How would you rate your knowledge of these topics?"

- I know relatively little
- I have general knowledge
- I know a lot about many of these aspects
- I'm a specialist or a professional who works in this field
- No reply



"Push the button!"- Sign in a commuter train, Munich, Germany 2009

**Mobility 2030 --TOPIC--SELECTION--**

Please choose a topic you are particularly interest in:

- Transportation systems**
- Transportation systems ecology
- Society**
- Information and communication technologies**
- Quit the survey



车次	始发站	终到站	开点	终到点	硬座/元	软座/元	硬卧下/元	软卧下/元
T155	北京站	泰州	18:18	7:47	165	***	301	458
T651	北京站	天津	18:30	19:44	35	45	***	***
Z9	北京站	杭州	18:53	8:23	***	307	***	539
Z21	北京站	上海	19:00	6:58	***	283	***	499
Z13	北京站	上海	19:07	7:05	***	***	***	499

Departure Display Panel, Beijing Central Station. PR China, 2006.

**Mobility 2030: Transportation system**

"By 2030, air travel on short- and medium-haul routes in your country will have largely been replaced by modern high-speed trains."

- Fully agree
- Agree somewhat
- Disagree
- Completely disagree
- Don't know
- Not relevant for my country



Airbus A380 on a Test Flight over Europe, 2008

**Mobility 2030: Transportation system**

"By 2030, the government will be subsidizing airline traffic and its infrastructure in your country."

- Fully agree
- Agree somewhat
- Disagree
- Completely disagree
- Don't know
- Not relevant for my country





High Speed Maglev, Germany, 2006.

**Mobility 2030: Transportation system**

"By 2030, your country will have an economic interest in offering maglev trains for ..."

	Fully agree	Agree somewhat	Disagree somewhat	Completely disagree	Don't know/Not relevant for my country
urban public transport	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
rapid airport connections	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
high-speed intercity travel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Explanation:**

Magnetic levitation transport, or **maglev**, is a form of transportation that suspends, guides and propels trains via electromagnetic force. This High-Tech method can be significantly faster than wheeled mass transit systems, potentially reaching velocities comparable to turboprop and jet aircraft in regular service. Maglevs are essentially highly reliable computer-controlled electronic transportation systems, with most maglevs requiring no moving mechanical parts for suspension, acceleration or braking. All these innovations could result in potentially much lower operational and maintenance expenditures, relatively lower energy consumptions while also enabling significantly higher speeds. The "Transrapid" Maglev running in Shanghai, the Japanese Linear Motor Car and the "Linimo" are among the most famous maglev systems.



Nightly departure from Tokyo Ueno, Japan, 2007.

**Mobility 2030: Transportation system**

"By 2030, travelers in your country will frequently choose modern night trains with comfortable sleeping compartments for medium-haul routes."

Fully agree

Agree somewhat

Disagree

Completely disagree

Don't know

Not relevant for my country





Tram in Downtown Milano, Italy, 2008

**Mobility 2030: Transportation system**

"In your country, the share of the public transport systems in the modal split of the transportation sector as a whole will have increased significantly by 2030."

Fully agree

Agree somewhat

Disagree

Completely disagree

Don't know

Not relevant for my country

**Explanation:**

*The term "modal split" is used in traffic statistics and refers to the ratios of the various transport modes making up traffic volume as a whole.*



Shinkansen approaching Kyoto station, Japan, 2007.

**Mobility 2030: Transportation system**

"In 2030, wheel-rail traffic in your country will have significantly lower top speeds than today because of efforts to contain energy and maintenance costs."

Fully agree

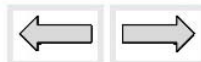
Agree somewhat

Disagree

Completely disagree

Don't know

Not relevant for my country





Switzerland, 2008.

**Mobility 2030: Transportation system**

"By 2030, cargo transport systems in your country will frequently have priority over public passenger transport systems."

- Fully agree
- Agree somewhat
- Disagree
- Completely disagree
- Don't know
- Not relevant for my country



Airport Sign. Europe, 2004

**Mobility 2030: Transportation system**

"By 2030, large luggage will be handled by package shipping companies that will send it as an express door-to-door delivery directly to the destination."

- Fully agree
- Agree somewhat
- Disagree
- Completely disagree
- Don't know
- Not relevant for my country





Rental Car and Shinkansen. Advertisement in Tokyo, Japan, 2008.

**Mobility 2030: Transportation system**

"By 2030, commercial car-rental companies will have displaced car-sharing services in your country."

- Fully agree
- Agree somewhat
- Disagree
- Completely disagree
- Don't know
- Not relevant for my country



Taxis in Hiroshima, Japan, 2008

**Mobility 2030: Transportation system**

"The use of taxis for individual transport in your country's urban areas will increase significantly by 2030."

- Fully agree
- Agree somewhat
- Disagree
- Completely disagree
- Don't know
- Not relevant for my country





Beijing, PR China

**Mobility 2030: Transportation system**

"By 2030, people in your country will regard having their own car for leisure trips as very important."

- Fully agree
- Agree somewhat
- Disagree
- Completely disagree
- Don't know
- Not relevant for my country



Road pricing in downtown Milan, It

**Mobility 2030: Transportation system**

"By 2030, road pricing systems will have been introduced for all private and commercial vehicles throughout your country."

- Fully agree
- Agree somewhat
- Disagree
- Completely disagree
- Don't know
- Not relevant for my country







Chengdu, PR China, 2007

**Mobility 2030: Transportation system**

"By 2030, the private car will be the most widely used means of transportation for reaching places on the outskirts of cities and in the suburbs."

- Fully agree
- Agree somewhat
- Disagree
- Completely disagree
- Don't know
- Not relevant for my country



Autobahn, Germany, 2008

**Mobility 2030: Transportation system**

"By 2030, road infrastructure maintenance (highways, bridges, etc.) in your country will be seriously underfunded."

- Fully agree
- Agree somewhat
- Disagree
- Completely disagree
- Don't know
- Not relevant for my country





Info Sign, Munich Subway, Germany, 20

### Mobility 2030: Transportation system

"How would you rate your knowledge of these topics?"

- I know relatively little
- I have general knowledge
- I know a lot about many of these aspects
- I'm a specialist or a professional who works in this field
- No reply



"Push the button!"- Sign in a commuter train, Munich, Germany 200

### Mobility 2030 --TOPIC--SELECTION--

Please choose a topic you are particularly interest in:

- Environment and ecology
- Information and communication technologies
- Society
- Quit the survey





Telephone Cabin Logo. Europe, ~1920.

**Mobility 2030: Information and communication technologies**

"By 2030, communication, information, booking, navigation, and payment systems will have converged into mobile end-user devices."

- Fully agree
- Agree somewhat
- Disagree
- Completely disagree
- Don't know
- Not relevant for my country

**Explanation:**

*Mobile end-user devices are small, portable electronic gadgets, such as mobile phones, handheld computers, notebook computers, netbooks, that can be used to communicate via mobile and/or fixed-line networks.*



Advertisement for mobile phones, Europe, 20

**Mobility 2030: Information and communication technologies**

"By 2030, most travel services will be booked using mobile devices (e.g. mobile phones, handheld computers)."

- Fully agree
- Agree somewhat
- Disagree
- Completely disagree
- Don't know
- Not relevant for my country





Germany, train coach, early 20th cent

**Mobility 2030: Information and communication technologies**

"In 2030, the use of voice-recognition systems for automated communication, booking, and payment procedures will have become widely accepted."

- Fully agree
- Agree somewhat
- Disagree
- Completely disagree
- Don't know

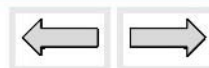


Automated ticket control. Milan Metro, Italy, 20

**Mobility 2030: Information and communication technologies**

"By 2030, best-price payment practices (discounting) based on electronically entered travel routes will be widely used in public transportation."

- Fully agree
- Agree somewhat
- Disagree
- Completely disagree
- Don't know
- Not relevant for my country





Advertisement for Electronic Ticketing, Kyoto, Japan, 2007.

**Mobility 2030: Information and communication technologies**

"By 2030, no one in your country will be paying their ticket (public transport) and toll (private car) by cash."

- Fully agree
- Agree somewhat
- Disagree
- Completely disagree
- Don't know
- Not relevant for my country

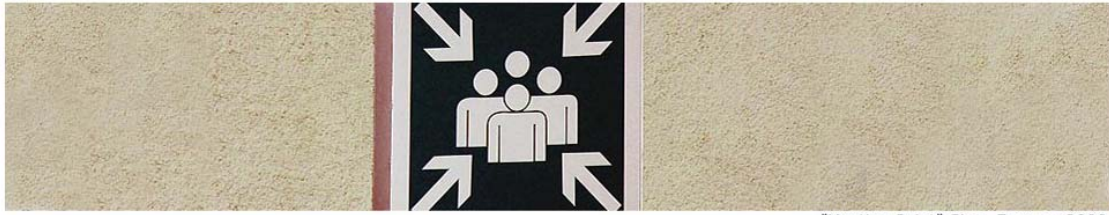


Comsat. Photo Courtesy of EADS. EU, 2008.

**Mobility 2030: Information and communication technologies**

"By 2030, mobile devices will have the following function for travelers in your country:"

	Agree	Disagree	Don't know	Not relevant for my country
Taking pictures	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Giving directions (GPS)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Travel guides (podcasts, text, images)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Credit-based payment systems	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Credit card	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Passive use: health insurance card (individual profile for medical treatment)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Active use: Health monitoring system	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Means of booking services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Identification card	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Real-time voice recognition and translation device	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



"Meeting Point" Sign, Europe, 2008.

**Mobility 2030: Information and communication technologies**

"Using the mobile phone for making last-minute reservations will have become the norm for train travel in your country by 2030."

- Fully agree
- Agree somewhat
- Disagree
- Completely disagree
- Don't know
- Not relevant for my country



Baggage Handling, Europe, 2008.

**Mobility 2030: Information and communication technologies**

"By 2030, tracing and tracking luggage will have become a standard procedure in your country."

- Fully agree
- Agree somewhat
- Disagree
- Completely disagree
- Don't know

**Explanation:**

"Tracing und tracking" refers to a method used for locating packages, luggage items, containers, vehicles, etc. By means of communication technologies (incl. radio frequency identification systems), users can trace and evaluate continuously an item's geographic location, as well as its position in a logistics chain. This means clients can obtain more precise details when transporting items, possibly helping them become more efficient in providing services. For example, a client will receive immediate information, including the likely delivery time, when asking about lost piece of luggage.



Info Sign, Munich Subway, Germany, 20

**Mobility 2030: Information and communication technologies**

"How would you rate your knowledge of these topics?"

- I know relatively little
- I have general knowledge
- I know a lot about many of these aspects
- I'm a specialist or a professional who works in this field
- No reply



"Push the button!"- Sign in a commuter train, Munich, Germany 20

**Mobility 2030 --TOPIC--SELECTION--**

Please choose a topic you are particularly interest in:

- Society**
- Environment and ecology**
- Quit the survey





Info Sign, Zurich Central Station, Switzerland, 2008.

**Mobility 2030: Society**

"By 2030, the appeal of a country as a destination will rely more strongly on the way safety is perceived than on what the country actually has to offer for tourists."

Fully agree

Agree somewhat

Disagree

Completely disagree

Don't know

Not relevant for my country





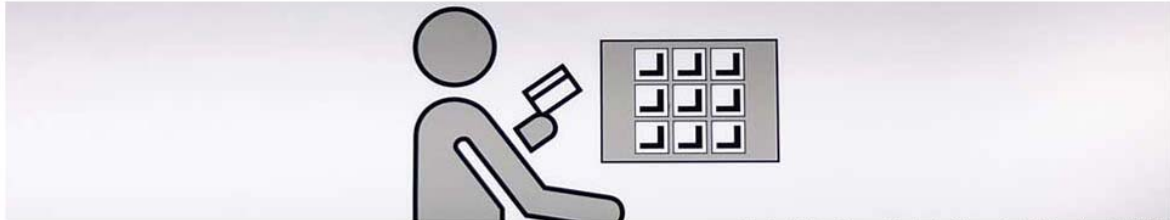


Security Regulations, Vienna Airport, Austria, 2008.

**Mobility 2030: Society**

"By 2030, your country will have effective measures to protect travelers against acts of violence and terrorist threats."

- Fully agree
- Agree somewhat
- Disagree
- Completely disagree
- Don't know
- Not relevant for my country



Cash Teller Sign, Zurich Airport, Switzerland 2008.

**Mobility 2030: Society**

"By 2030, your country will have reliable data privacy measures in place for all client profiles."

- Fully agree
- Agree somewhat
- Disagree
- Completely disagree
- Don't know
- Not relevant for my country





"High Speed Preferred" - a Shinkansen Advertisement in Japan, 2006.

**Mobility 2030: Society**

"By 2030, the citizens of your country will disclose their personal travel and mobility preferences routinely to private travel providers when requesting personalized travel services."

- Fully agree
- Agree somewhat
- Disagree
- Completely disagree
- Don't know
- Not relevant for my country



Detail of a Subway Ticket, Beijing, 20

**Mobility 2030: Society**

"How will average travel costs (adjusted for inflation) for citizens of your country have changed by 2030?"

	Much higher	Slightly higher	About the same	Slightly lower	Much lower	Don't know / not relevant
For business travel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
For leisure travel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
For holiday travel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>





Japanese High Speed Trains, Osaka, 2008

**Mobility 2030: Society**

"By 2030, offering efficient high-quality rail service will be seen as an important basic provision by the public sector of your country."

- Fully agree
- Agree somewhat
- Disagree
- Completely disagree
- Don't know
- Not relevant for my country



Passengers boarding a Low Cost Carrier. Europe, 2008.

**Mobility 2030: Society**

"By 2030, the people of your country will, on average, have significantly more time available for leisure travel than they do today."

- Fully agree
- Agree somewhat
- Disagree
- Completely disagree
- Don't know
- Not relevant for my country





"Be smart, take the tram". Detail of a PT Promotion Campaign Poster, Oostende, Belgium, 2006.

**Mobility 2030: Society**

"As levels of education rise, people of your country will also have higher expectations by 2030 when it comes to service quality in tourism and mobility."

- Fully agree
- Agree somewhat
- Disagree
- Completely disagree
- Don't know
- Not relevant for my country



Official Sticker in the Vienna Subway Trains, Austria, 2008.

**Mobility 2030: Society**

"By 2030, your country will have a broad range of tourism and mobility services, especially for people with disabilities (seeing, walking)."

- Fully agree
- Agree somewhat
- Disagree
- Completely disagree
- Don't know
- Not relevant for my country





Central Tokyo, Japan, 2007.

**Mobility 2030: Society**

"All in all, urbanization (growth and rise of importance of cities) will continue in your country to the year 2030."

Fully agree

Agree somewhat

Disagree

Completely disagree

Don't know

Not relevant for my country



Info Sign, Munich Subway, Germany, 2008

**Mobility 2030: Society**

"How would you rate your knowledge of these topics?"

I know relatively little

I have general knowledge

I know a lot about many of these aspects

I'm a specialist or a professional who works in this field

No reply





"Push the button!"- Sign in a commuter train, Munich, Germany 200

**Mobility 2030 --TOPIC--SELECTION--**

Please choose a topic you are particularly interest in:

**Environment and ecology**

Quit the survey



Vienna, Austria, 20

**Mobility 2030: Environment & ecology**

"When comparing private cars and public transport, differences in energy consumption and pollution emission levels are likely to be eliminated in your country by 2030."

Fully agree

Agree somewhat

Disagree

Completely disagree

Don't know

Not relevant for my country





Airplane, testing fuel cells. Germany, 2008.

**Mobility 2030: Environment & ecology**

"By 2030, your country will have found ways of compensating the rising costs of energy and raw materials through efficiency gains."

Fully agree

Agree somewhat

Disagree

Completely disagree

Don't know

Not relevant for my country



Petrochemical Industry, EU, 2008.

**Mobility 2030: Environment & ecology**

"By 2030, your country will no longer experience a shortage of energy in its transportation sector because it will have learned to use available energy sources more efficiently."

Fully agree

Agree somewhat

Disagree

Completely disagree

Don't know

Not relevant for my country





Duesseldorf Airport, Germany, 2008.

**Mobility 2030: Environment & ecology**

"By 2030, which means of transportation would generally be suitable for people in your country as an attractive alternative to air travel on distances of up to 650 miles / 1000 km?"

	most suitable	suitable	unsuitable	most unsuitable	Don't know	Not relevant for my country
Own car	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Long-distance bus	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Overnight train with comfortable sleeping compartments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fast conventional trains (TGV, ICE, Shinkansen,...)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
High-speed maglev trains	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ferries and ships with comfortable cabins	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



Aircraft Turbine Engine Test. EU, 2008.

**Mobility 2030: Environment & ecology**

"By 2030, cleaner jet engines with lower noise emissions will have significantly reshaped attitudes toward the environmental impact of air travel in your country."

- Fully agree
- Agree somewhat
- Disagree
- Completely disagree
- Don't know
- Not relevant for my country







Artist's View of a New Traffic Sign. Cover Page Detail of "Tip" Magazine. Berlin, 2005.

**Mobility 2030: Environment & ecology**

"By 2030, the debate between public and private transportation in cities will generally have been settled in favor of public transportation systems."

- Fully agree
- Agree somewhat
- Disagree
- Completely disagree
- Don't know
- Not relevant for my country



Train Station Bicycle Parking. Switzerland, 2008.

**Mobility 2030: Environment & ecology**

"By 2030, bicycle traffic in cities will have a significantly higher share in the modal split than it does today."

- Fully agree
- Agree somewhat
- Disagree
- Completely disagree
- Don't know
- Not relevant for my country





Bicycle Parking in Karlsruhe, Germany, 2008.

**Mobility 2030: Environment & ecology**

"By 2030, your country will have introduced taxes for bicycles and fees for public bicycle parking."

- Fully agree
- Agree somewhat
- Disagree
- Completely disagree
- Don't know
- Not relevant for my country



NASA photo, 2003 (public domain).

**Mobility 2030: Environment & ecology**

"By 2030, the consequences of climate change may be interfering significantly with transportation schedules. Does this apply to the following types of transportation in your country?"

	Fully agree	Agree somewhat	Disagree	Completely disagree	Don't know	Not relevant for my country
Long-haul air travel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Short- and medium-haul air travel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
High-speed train travel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Regional train travel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Holiday bus travel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Passenger boat travel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>





# 待合室 Waiting Room

Tokyo Maronouchi Station. Japan, 2006.

## Mobility 2030: Environment & ecology

"By 2030, the external costs (externalities) of travel will largely have been integrated in the price of transportation."

- Fully agree
- Agree somewhat
- Disagree
- Completely disagree
- Don't know
- Not relevant for my country

### Explanation:

"External costs of travel" refers to costs that are caused but not covered by travelers. The most important external cost categories are health risks from air pollution and noise, impact on climate, and loss of nature and destruction of landscape (overbuilding, barred access to areas). Further external costs relate to accidents and traffic jams (loss of time), among other aspects.



Coal-fired Power Station. EU, 2008.

## Mobility 2030: Environment & ecology

"Which measures will have become particularly suitable for solving environmental problems caused by transportation in your country by 2030?"

Please rank these five items from "1" to "5". "1" stands for most suitable, whereas "5" stands for less suitable. Each number has to be chosen only once.

The power of the free market (laissez-faire approach)

Use of and innovation in technology

Strategies for changing consumer behavior (soft policies)

Administrative requirements (laws, bans)

Taxes, subsidies, financial incentives



Info Sign, Munich Subway, Germany, 2008.

**Mobility 2030: Environment & ecology**

"How would you rate your knowledge of these topics?"

- I know relatively little
- I have general knowledge
- I know a lot about many of these aspects
- I'm a specialist or a professional who works in this field
- No reply



Transrapid Maglev, Shanghai, 2008.

**Mobility 2030: Results via Email and Suggestions**

If you would like to receive a pdf-copy of the findings of this study, please enter your e-mail address.

How did you learn about this survey?

Please feel free to include any feedback on this study.



**Thank you for your time!**

Best Regards,

Lucerne University of  
Applied Sciences and Arts

**HOCHSCHULE  
LUZERN**

For the Project Team:

Dr. Johannes Klühspies

Photos (unless otherwise mentioned): © Johannes Klühspies

Contact: johannes.kluehspies [ @ ] hslu.ch

## **4.3 Remarks, feedbacks from participants**

### 4.3.1.1 Remarks in English language

1. a ' new deal ' will change the way we think, so in the next few months there will be a whole new world and what 's important today it will be irrelevant tomorrow. Can't wait for the maglev train connecting every continent - except one [...]
2. a bit long
3. After being journalist in Brazil and in Switzerland (Bern) for many years, I built up my Business Communication Consulting Company in Curitiba and have done many jobs in the fields you covered in your survey. I would be very pleased to receive copy of the results [...]
4. Also please send the questionnaire sheet, because it will be referred at the web-based interview in future.
5. An excellent survey especially as it pertains to attitudes in developing countries. I personally am anxious to witness infrastructure developments in such places as Morocco, Argentina and

Pittsburgh, Pennsylvania.

6. Because of the scarcity of oil and global climate change concerns, land transport will largely shift to electric power. My company believes that superconducting Maglev for passengers and truck freight (roll-on, roll-off trucks) for metro deliveries will [...]
7. Could have used some basic value questions such as 'How do you feel about climate change? etc to gauge person's perspective.
8. For some items, I feel the questions are too 'fuzzy' to give a more correct answer. BUT, this is a nice challenge. Look forward to your report.
9. Future tourism trend is very important issue worldwide, and I'm glad to share the opinions through this questionnaire. I look forward to the results, especially in the viewpoint of the difference (or trends) of opinions by the regions.
10. good
11. Good effort
12. good initiative - am curious to learn about the results of it
13. good job
14. Good luck
15. Good luck!!
16. good questions -- my own view follows:
17. Good questions. I will await for the results.
18. Good survey, but there is no way to induce creativity in your questions. Why don't we create new transport systems ? based on existing or new infrastructure. [...]
19. Great formatting and speed
20. Great photos. Very nice design. Guten Erfolg
21. Great study ! I am convinced that the gained results will have a great impact on your study and the development of new means of transportation and ways people think about it.
22. Here in Galway, Ireland, we are about 110k population and I am part of a committee trying to convince our 'City Managers' that a light rail system is needed to 'FIX' our terrible traffic congestion in the city. [...]
23. I am absolutely pro MagLev and am affiliated with a political organization in the US which has been calling for rapid transport systems for the past 20 years particularly MagLev . Rapid transit is needed to serve cities where most persons are commuting [...]
24. I am curious how the results of these surveys will be used. It would be relevant in helping to make policy decisions.
25. I am deeply disappointed by the failure of all the Maglev-line-construction projects in Germany. In witnessing the behavior of our political leaders in other fields of public life, I have come to the conclusion, that the majority of them are criminals.
26. I am interested in the applied vision after you have processed the results of this survey. If you have a suitable document I would love to receive a copy. We might also be able to discuss the overlap and differences between your vision and i.e. Logica's [...]
27. I am looking forward to seeing the results. Denmark is a very old fashioned country in regards to travel. I am sure that our politicians would prefer that we used horse draw carriages to travel with. We still have local air transport and [...]
28. I am pessimistic about my country but feel that many other countries in Europe are on the right track.
29. I appears to look at existing technology only. At the moment, High speed trains, Maglev and air travel are all pushing around the same figures in terms of total travel time and environmental impacts. If you improve one aspect you tend to make the other [...]

30. I didn't think much of the questions asked in relation to the issues facing my country
31. I don't know if my opinion really helped or not in this survey. I would hope Transrapid will take root in my neighborhood someday. More specifically the Nashville, TN area. Right now, there is only one commuter rail line running in the state [...]
32. I expect people may answer 'I moderately agree' to most questions.
33. I found quite often that I had to ensure I was answering what I thought, rather than what I hoped. Hopefully, the actual situation in Canada in 2030 will be much better than I think it will, but with 20 years to go and the state of our transportation [...]
34. I found this survey problematic in a number of ways, most importantly in that it was focused on my predictions of specific trends without asking about what I felt were the \*drivers\* of these trends. For example, I happen to feel that global fossil fuel d
35. I like the idea of this kind of survey, and choosing mechanism as well. Good luck!
36. I liked the pictures, nice idea to make the survey more attractive
37. I think it is quite a good effort
38. I think it would be interesting to specify what you mean by 'for your country'. I've given answers knowing it but not the solution that I personally think could really help the country.
39. I think maglev will become very important but NOT configured as a train. Train is 19th century technology with big prime mover. Maglev has prime mover in guide way. That means each unit can be routed independently of others. Service will be point-to-point [...]
40. I think the time demand can be too short to be fulfilled regarding Maglev in Sweden. But by time I suppose that more and more people and politicians are becoming aware of the potential for the Maglev-trains.
41. I thought the questions were quite provocative and interesting. The survey instrument was very user friendly. I would like to receive a preliminary copy of the findings when they are available.
42. I was too tired to answer all the questions - because of too much work. Some questions I might not understand well enough because of my poor English knowledge. But I hope to understand the most well. [...]
43. I wish that there had been more inclusive use of maglev or even maglift. For many of the answers where 'rail' was the only selection, I answered as if rail included maglev or maglift.
44. I wonder if my answer are of any relevance to be honest, as it is hard to estimate the situation in 20 years from now :-)
45. I wonder if the scaling at the beginning of the survey should include 'important' as well (in addition to not important at all and very important)
46. I would have been more likely to continue if it would be possible to view the entire survey questions at once. (or go through quickly without answering, and then return to the unanswered questions. IMO, the survey questions neglect to ask the most f
47. I would like to have a free pdf-copy of the findings. Thank you!
48. I'd like to know what kind of software is used to put this survey online. I like the way it is, especially the top banner pictures (I took time to watch every one of them).
49. In my mind it is a great idea to ask these Questions and I hope you will find out some important facts.
50. interesting
51. interesting
52. interesting questions
53. Interesting questions. Still, without the good design (esp. the photos) I would not have completed your survey. Well done survey, will recommend it to my colleague.
54. Interesting survey. Would you like the names of others to contact for survey?

55. Ireland is a small country so a few questions were not relevant
56. It has a very good approach and less cost!
57. It is a very confusing survey! I am a supporter of high speed rail service as Maglev. I am very familiar with Maglev systems. There will be by 2030 revolutionary changes in all of transportation. Vertical take off and Landing in City Ports will be standard [...]
58. It is too long
59. It was enjoyable and thought provoking. Thanks.
60. It's difficult to reply to some questions. In most cases, the response reflects the respondent's hope that things will improve in the future and not what the countries are really doing for improving them
61. It's hard to know what will be in 2030, particularly whether environmental alarmism will continue at its current rate or whether the pendulum will swing back to more rational consideration of transport and environmental issues such as helping people rise [...]
62. Leaves out next generation transit technologies entirely
63. Like the graphics and easiness to complete
64. Look forward to receive an interesting result
65. Looking forward to receiving results of the survey.
66. Many of the questions could be answered with various reasons in mind, and it is not entirely clear how the results will be interpreted. For example, if something is going to 'remain unchanged' in importance, that might mean it is already important now [...]
67. Mobility is connected to the ability of people to afford any kind of means of transportation, especially when economics are decreasing.
68. More background information about the survey should have been given.
69. Much too long - suggestive of a government survey
70. Multiple options were a bit eschewed: 'disagree' and 'agree somewhat' are not symmetrical (- better to have used 'disagree somewhat'). Also, a five-point scale with 'don't know/?' as the central choice would have worked best.
71. Multiple-guess does a poor job of communicating. Our project, the TriTrack is a dual mode personal car that drives on the street but then converts and goes up onto a monorail. It has five power modes depending on which part of each journey you are on. [...]
72. My expertise is more related to high speed grade separated mass transit routes and includes rubber-tired medium speed (60-120 mph) monorail systems as well as maglev.
73. nice pictures
74. Nice pictures !
75. Nice survey format, very slick and easy to use.
76. Nice survey. We are not a developed county yet. So I can see many trends that will be important in the future, maybe. But for a 3rd world country many trends just will not happen. People are poor and want food, house, education - very few can afford [...]
77. Nicely implemented web hosting. All the best with your research. Alan James
78. Not enough scope for technical input
79. ok
80. Partially quite suggestive questions and answers.
81. Please use may mail to Mr. KlÃ¼hspies
82. Questions are in some aspects not exactly to the point.
83. Quite good!



84. Rail/Sea Mass Transportation Tourism Networks are the Future with Solar and Wind Energy as the catalyst
85. Related to many questions there are strong differences between what I think about the 2030 situation in my country and what should be done for a sustainable transportation. For example, I think that it would be better to improve public transportation [...]
86. Responses by different continents will be interesting
87. Seems maglev focused - which is OK. In the next decade a lot of work will go into re-orienting the USA traveler from their mono-modal automobile paradigm of today -- to a smart multi-mobility future. Once a growing number of consumers lets go of the car [...]
88. Several questions did not permit an answer, at least for the USA. Example: The question on subsidy for 'infrastructure and air services' permits only one response, whereas chances are that infrastructure will be subsidized but no air service. I could cite [...]
89. some introduction to why the survey is being done would have been nice
90. some of the English in the questions needed to be significantly improved as a number of questions could be interpreted in different ways
91. Some of the questions are ambiguous; in parts of the survey you might want to clarify if you inquire about domestic travel. From perspective of a European living in a country such as Lebanon where compliance with traffic rules (wearing of seatbelts, not
92. Some questions are based on too many unknown factors, especially in Polish conditions. Nevertheless it seems that the survey may be interesting.
93. Some questions could be more specific. It depends of too many factors
94. Some questions were difficult to answer because of the way they were expressed.
95. Some questions were not clear to me. Was I supposed to express my wishes/visions ? Or was I supposed to give a prognosis ?
96. Sometimes questions are asked in a double sense. Overall ok.
97. Sometimes this was difficult to answer because the technology/ policy/ strategy already exists. I interpreted this as widespread use!
98. Somewhat difficult to imagine in 2030, however, I enjoyed to answer them.
99. Sounds like an interesting study, I look forward to the results.
100. Study would be richer if you would have respondents give some narrative on their answers.
101. thank you
102. Thank you for the co-operation
103. Thank you very much for thinking about the next twenty years. It is quite contrary to the discouraging 'strategies' of our principal leaders - particularly in Europe. There should be more incentives of this kind to promote ecofriendlier technologies [...]
104. Thanks
105. Thanks you.
106. The difference between 1st and 2nd or 3rd world is so big.
107. The email gives the impression it will take a few minutes and that is not true you actually want people to answer all questions on all the topics and that more like 20+minutes, which is why I quit the survey.
108. the formulation of some of the questions was problematic
109. The points raised are very interesting as they come from a developed country's point of view. My answers to the questions has underlined how much more work my country has to put in order to improve its systems and the people's way of life.
110. The prospective is quite difficult in those items.

111. The question about virtual travel needs to be broken into two questions. Do I think that people will increasingly be attracted to virtual travel technologies? Yes. Do I think this will replace physical travel? Absolutely not. [...]
112. The questions are based on European experience, so they are difficult to answer for developing countries.
113. The questions were very general and it was unclear what the research objectives were or how answers to such general questions would help shape informed transportation policy or individual decisions making. It looked more like consumer attitude surveys [...]
114. The results should be very interesting.
115. The study is based on attitudes, and somewhat to attitudes and motives. Good luck in predicting all these things for the year of 2030!
116. The study strongly focuses on mainstream topics. Questions regarding ITS (Integrated Travel Systems) or alternative car-refuel infrastructure development or development VFR (Visiting friends and relatives) tourism are missing to my disappointment.
117. The survey is well designed but I don't know how reliable can be the answers.
118. The survey was interesting in the issues that it raised. However, I felt that its emphasis on rail technologies was perhaps not that relevant at the current time, although this does not mean that Australia would not have much greater emphasis on intercity [...]
119. The title is somewhat misleading as 'mobility' is subject to different interpretations.
120. The use of PRT/Podcars will probably be very widespread by 2030. This makes your questions impossible to answer correctly in some cases. The entire survey is close to worthless due to lack of imagination of what could happen. Admittedly, it is hard to [...]
121. There should be a category for engineering since science and engineering do differ.
122. There should be more research like this !
123. This is a very well done study. I like the design. Questions cover many topics, wide picture. Interesting.
124. This is a wide-ranging survey. It will be important to compare those who describe themselves as ' working in the specialist field(s)' from general travelers who may not have the data or specialist knowledge to foresee to 2030.
125. This type of study need to be enhanced. Thank you for your solicitation [...]
126. Thought it was a well prepared instrument
127. Too long!
128. Too long.
129. Too many details!!
130. Transportation questions were pretty rail-biased - are there any other options?
131. Try to include behavioural aspects which are important.
132. Typing error in one of the scale questions - 2 x 'not really important' in the travel motives section
133. very good
134. Very good survey, easy to fill, congratulations!
135. Very good survey. Very good pictures. Wish to get results. Will be published by Cities f mobility?
136. Very interesting work. I look forward to seeing the results
137. Well done survey. Many relevant aspects, still there will be many more. Design is great and very user friendly. Very modern approach, best I have seen in years. Pecs in the header kept me clicking. Send the results, please.

- 138. Yay!
- 139. yes
- 140. You forget the use of maglev for intercontinental freight to remove highly polluting air & sea freighters. I know the capital cost will be high as well as the power station cost (carbon capturing) since the nuclear option is hampered [...]

#### 4.3.1.2 Remarks in German language

Note: Very long remarks and personal statements that included individual names are shortened / anonymized.

1. Wird spannend, was die meisten so vermuten. Das Ergebnis wird besser sein als eine Einzeleinschätzung.
2. Wieso haben Magnetschwebbahnen (als Zukunftstechnologie) in Ihren Fragen so eine grosse Bedeutung? Eine durch technischen Fortschritt wesentlich effizienter gestaltete individuelle Mobilität ist meiner Ansicht nach wesentlich wahrscheinlicher.
3. Wie weit wurde der Fussgänger- und Fahrrad- / Motorradverkehr in die Studie einbezogen
4. Wie viele Umfragen sehr viele (zu viele?) Fragen
5. Wie sind Sie auf mich aufmerksam geworden?
6. Wichtigstes Ziel der Politik sollte sein, dass die geplante Bahnprivatisierung in Deutschland gestoppt und verhindert wird. Die Mehrheit der Bürger ist gegen eine Privatisierung der Bahn.
7. Wer ist Auftraggeber des FE?
8. welche Mobilitätsangebote ausserhalb der heute Üblichen wären denkbar?
9. weiter so !
10. Warum berücksichtigen Sie nicht Individualverkehr mit elektrischen Antrieben.
11. war gut gemacht
12. Wünschenswert: Art der Energiebereitstellung für die Mobilität (Biokraftstoffe, Windkraft, etc) sollte auch befragt werden.
13. Viele Antworten ergeben sich aus indirekten oder Rückkopplungseffekten. So wird der Luftverkehr heute wie künftig auch vor allem über die Flughäfenfinanzierung subventioniert.
14. Viel Erfolg, hört sich spannend an. Mit kollegialem Gruss, Wachowiak
15. Viel Erfolg
16. Verkehrstechnik unserer Zukunft - Wachstum - Infrastruktur - Logistik - Umwelt - Arbeit, Transrapid -Weiterentwicklung Doppelstöckige Magnetbahn. Massenarbeitslosigkeit in vielen Ländern kann auf Jahrzehnte erheblich reduziert werden. [...]
17. Um die Antworten auf einigen Fragen richtig interpretieren zu können ist es wichtig die Umstände im Land des Respondenten zu kennen. Eine Zunahme des Fahrradverkehrs ist zum Beispiel in den Niederlanden nicht sehr wahrscheinlich, da das Velo schon einen [...]
18. tolles graphisches Design
19. Themen sind sehr gut zusammengestellt.
20. teilweise zu allgemeine Fragestellungen!
21. Teilweise wenig nachvollziehbare Fragen, da zu prognostisch und aus der heutigen Situation heraus abschätzbar.
22. Technisch sehr elegant gelöst, Fragen sehr verständlich und eindeutig!
23. Sie sollten solche Umfragen vorher testen - für jeweils die Nation, die Sie befragen. Wenn ich

mir vorstelle, dass Sie den gleichen Fragebogen für Belgien, Norwegen und Deutschland anwenden, dann sehe ich Probleme. Werten Sie also wenigstens die Ergebnisse nach Ländern aus [...]

24. sehr lang
25. sehr komfortabel eingerichtet!
26. Sehr interessant, bin gespannt was rauskommt. Fragen sind zum Teil wirklich schwer zu beantworten. Es gibt sehr viele Einflussfaktoren!
27. sehr interessant
28. Sehr gut, Danke
29. sehr ansprechend gestaltet
30. schöne Animationen (Bilder), schnelle Durchführung durch automatisches Weiterblättern
31. Schön, schnell und übersichtlich gelöst. Keine kritikwürdigen Punkte.
32. Publizieren gerne Ergebnisse in unserem Magazin [...]
33. Positiv: Vor- und Rücknavigation Sehr schneller Seitenaufbau Knapp und präzise formulierte Fragen ansehnliche Präsentation /Bebildung der Seiten
34. optisch sehr ansprechend! Ergebnisse per Mail sind ein guter Anreiz
35. Nein. Bin aber gespannt auf das Ergebnis. Wirklich intensive Ergebnisse werden Sie 'eh nur auf der Basis gesprächsgeführter Interviews erhalten.
36. Methodisch eine der besten Online-Befragungen, die ich mitgemacht habe. Aber: die Fotos sind so gut und eindrucklich, dass ich mich frage, ob sie irgendwann begonnen haben, suggestiv mein Antwortverhalten zu beeinflussen.
37. mehr Vorabinfo (Möglichkeit des Abbruchs nach Interessensgebieten), Zwischenspeichermöglichkeit (d.h. Bearbeitung in mehreren Sitzungen), Anzeige des 'Erfüllungsgrades'
38. Mehr Informationen zu Hintergründen der Studie, Auftraggeber, etc. Bessere Vorabinformationen, Gründe für Auswahl der Teilnehmer
39. Manche Fragen sind unbefriedigend, die Art des künftigen Treibstoffes z.B. Elektro oder die finanziellen Zwänge, die durch höhere, bzw. nicht mehr bezahlbare Benzinkosten (Flugverkehr) entstehen können/werden halte ich für zu wenig beachtet. [...]
40. Liegt das Ziel in dieser Studie eigentlich im Herausfinden persönlicher Präferenzen/ Wünsche oder in dem Abfragen der Einschätzung der allgemeinen Entwicklung der Gesellschaft?
41. ja, ich finde die grafische Gestaltung sehr gelungen; kann man irgendwie an die Bilder kommen? Gibt's da vielleicht Pläne, diese in einem Heft oder Kalender zu veröffentlichen? Könnte man ja auch als Dankeschön an die Teilnehmer versenden? [...]
42. Interessante Umfrage - Viel Erfolg bei der wissenschaftlichen Arbeit
43. interessante Studie
44. In dem Befragungsteil 'Rangreihung' ist ein Tippfehler. Sechs steht im Text, es sind aber nur 5 Möglichkeiten gegeben.
45. Ich habe manche Fragen nicht verstanden, eine Erklärung fehlte. Im Bereich Umwelt und Ökologie fehlte das normale Bahnangebot, abgefragt wurde nur 'Nachtzug' und 'Komfortreisezug'
46. ich habe 20min gebraucht
47. Ich hätte noch gerne das Thema Automobil speziell für den Geschäftsreiseverkehr stärker betont gesehen. Immerhin finden allein in Deutschland fast 1/2 Mrd. Dienstreisen im Jahr mit Firmenfahrzeugen statt. Nach Abschluss Ihrer Untersuchung würde ich gerne die Ergebnisse erhalten.
48. ich bin sehr an den Ergebnissen Ihrer Studie interessiert und würde mich freuen Ihre

Auswertungen per Mail zu erhalten.

49. hat Spass gemacht, tolle Bilder auch.
50. Hallo in die Schweiz, ..spannende Umfrage, enorm wichtiges Thema. Aus kollegialer Sicht wäre ich an einer auch kontinuierlichen Kommunikation interessiert (sicher auch im Namen meiner Kollegen in Berlin und Hamburg), 'lassen Sie gerne einmal von sich hören!
51. Gutes Gelingen !
52. Gute Fragen!
53. gute Aufbereitung
54. Gut gemachter Fragebogen Sehr gut, dass man auch nur an einem Themenblock mitwirken kann
55. gut gemacht!
56. good luck
57. Glaube nicht, dass solche Befragungen irgendeinen Sinn haben
58. Fragestellungen und Einschätzungen schwer zu trennen von der eigenen Meinung 'für Sie' hin zur pauschalen Prognose 'in Ihrem Land' ...
59. Fragen sehr unpräzise und zu oberflächlich!!
60. Fragebogen etwas zu lang, aber sehr interessant und übersichtlich.
61. Frage mich, was das soll
62. faszinierend inspirierende Bilder
63. Etwa 5 Antworten sind nur durch indirekte Effekte und erwartete Rückkopplungen verständlich. Ich hätte mir gewünscht, dies dort kurz erklären zu können.
64. einige Fragen waren eher schwer zu verstehen
65. Die angeschriebenen Personen sollten mit den jeweils richtigen Titeln bez. ohne Titel angesprochen werden!!
66. die Angabe, dass die Umfrage etwa 3-6 Minuten dauert, ist nicht unbedingt richtig.
67. Derartige Fragebögen sind immer eine grobe Vereinfachung einer komplexen Realität.
68. Der Zweck der Befragung ist mir insgesamt etwas unklar.
69. Der Individualverkehr wird zuwenig durchleuchtet
70. Der Hinweis bei den Fragen 'in ihrem Land' ist oft nicht klar: gilt das nur für Reisen vollständig innerhalb des Landes, oder auch für grenzüberschreitende Reisen die im Land, in dem man wohnt, beginnen?
71. Definitive Aussagen über die Zukunft zu treffen, ist immer schwierig. Es ist mir nicht klar gewesen, ob mein Wissen, meine Meinung oder meine Wünsche gefragt sind. Ich habe mich auf etwas zwischen (vermeintlichem) Wissen und Meinung geeinigt.
72. Das automatische Weiterspringen nach Beantworten einer Frage irritiert ein wenig
73. Da Sie in der Email darauf verwiesen haben, dass Ihnen besonders an meiner Meinung liegt, hätte ich gedacht (und gewünscht), dass das Thema CarSharing stärker beachtet worden wäre. Insbesondere habe ich beim Thema MIV (z.B. im Themenbereich Umwelt) [...]
74. Bitte zukünftig eine Aussage über die Dauer der Befragung beifügen.
75. Bitte vorher kenntlich machen, welche und wie viele Fragen zu den Themenbereichen beantwortet werden können/müssen.
76. Bin sehr an den Ergebnissen interessiert und stehe ggf. für weitere Detailfragen aus dem Bereich der Schienenfahrzeuge / -industrie zur Verfügung
77. Bilder werden bei mir nicht angezeigt
78. Benutzerführung mit dem 'automatischen' Weitergehen ist etwas gewöhnungsbedürftig - vor

- allem, da es nach der Einschätzung des eigenen Wissensstandes nicht automatisch weitergeht.
79. Bei vielen Fragen wurde eine Freiheit unter mehreren Angeboten, Dienstleistungen oder Verkehrsmitteln zu wählen unterstellt. Ich denke, dass aufgrund der hohen Energie- und damit Mobilitätskosten diese Wahlfreiheit gar nicht bestehen dürfte.
  80. Bei manchen Fragen fehlt Antwortmöglichkeit 'bleibt gleich' (beantwortet mit 'weiss nicht')  
Manche Antworten tendieren dazu, Wunschvorstellungen zu sein
  81. Bei einigen Fragen erging es mir so, dass meine Einschätzungen des Kundenverhaltens (in dem einen Fragekomplex) erheblich von den Möglichkeiten des Transportsystems sich unterschieden; z.B. wäre aus meiner Sicht die Substitution von Kurz- und Mittelstrecken [...]
  82. Aspekte des nicht motorisierten Verkehrs scheinen mir zu kurz zu kommen.
  83. Übersichtlicher Fragebogen, gut gelungen
  84. Anmerkung: Wir führen zusammen mit dem Institut für Mobilitätsforschung (ifmo), Berlin, eine gross angelegte Szenariostudie 'Mobilität 2030' durch. Sie wird im Herbst diesen Jahres fertig. Die Vorgängerstudie kann beim ifmo angefordert werden. [...]
  85. Aktuelle Studie 2008 'Transport & Traffic 2030' der TU Darmstadt. Ich war dort selbst Teilnehmer eines grossen Symposiums. U. U. ergänzen sich diese.
  86. Abgefragt wurden Meinungen. Die Kriterien die zur Meinungsbildung notwendig sind, z.B. wie entwickelt sich der Ölpreis, die wirtschaftliche Lage, etc. werden nicht beleuchtet. Der Zweck der Umfrage sollte eigentlich dem Befragten bekannt gemacht sein; [...]
  87. 2030 ist ein relativ lang gefasster Zeithorizont, ein Vorausschau damit schwierig, einfacher wäre es Angaben zu 2020 zu machen ...
  88. 1. Die Fragen lassen wirklich fortschrittliche Entwicklungslinien aus; dadurch werden die Ergebnisse latent konservativ wirken. Das ist schade. 2. Die Delphi-Methode muss dem Probanden die Unterscheidung ermöglichen zwischen optimistischer Prognose, [...]
  89. - Reihung der Wichtigkeit von Massnahmen (z.B. Gesetze, Marktwirtschaft, Technik) ist meiner Ansicht nach schwierig zu beantworten. Da z.B. Technik oft durch gesetzliche Rahmenbedingungen erst angeregt wird (z.B. Euro-Stufen zur Emissionsminderung..) [...]
  90. Die derzeit eskalierende wirtschaftliche (finanzpolitische) Situation, kombiniert mit der sich daraus entwickelnden politischen Krisensituation in vielen Teilen der Welt ( die in 1-2 Jahren erst noch kommen wird ) wird 90% von alldem, was wir derzeit an [...]

## 4.4 Imprint

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