Time-series analysis of German outbound travel patterns

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ABSTRACT
KEYWORDS: Germany, outbound travel, destination choice, destination familiarity, longitudinal analysis

This paper discusses trends in German outbound tourism over 20 years from 1970 to 1992. It reveals changing trends with regard to destination choice and transportation mode used by German tourists. Further, the paper discloses that Germans are becoming more familiar with destinations not only in Europe but also in many other countries and regions of the world. It is argued that while the increasing destination familiarity by Germans could increase the potential of more effective use of word-of-mouth communication channels, it may also reduce the amount of repeat business owing to a desire to see other, new places. Longitudinal research on individuals' travel careers is required to identify segments based on their travel experience and travel destination choice patterns such as to facilitate more cost-effective marketing efforts.

INTRODUCTION

The use of time-series analysis of changing travel patterns is rare in tourism research although it could be a valuable tool in tourism analysis.[1] A general lack of temporal studies has been noted by Mitchell and Smith[2] who attributed it to a deficiency in collection of time-series data. Although temporal changes could mean annual, life cycle and cohort patterns,[3] only annual changes will be discussed in this paper. Yet the reader should be aware that the other two time dimensions (ie life style and cohort patterns) may significantly influence annual patterns.

Germany is the most important of tourist-generating countries worldwide.[4] It accounts for one-third of all overnight trips abroad in Europe.[5] With 62 million trips in 1990, it generated almost 50 per cent more trips than the second ranked United States.[6] A high average household income, a large middle-class population, and their long holidays in particular (between five and seven weeks a year) are important factors contributing to the large number of trips generated each year not only to European but also non-European destinations. In 1991, Germany was the most important source of foreign tourist arrivals to European countries such as Austria, Switzerland, Italy, France and Poland and to overseas destinations such as Tunisia (Table 1). Its economic contribution often exceeds its share in tourist arrivals owing to a usually longer length of stay of German tourists and their above average expenditure per trip. Hence, changing travel trends in the

Table 1: Importance of German tourist arrivals in selected countries in 1991 (ranking) as compared to arrivals from Japan, USA, UK, and France

Destination country	Unit (+)	German share	Germany rank	UK rank	France rank	USA rank	Japan rank
Austria	H	50.93	1	4	6	7	11
Switzerland	H	30.32	1	5	4	2	6
Italy	H	29.98	1	4	2	3	8
France	T	24.18	1	3	—	8	10
Greece	T	19.42	2	1	5	11	★
Turkey	V	14.12	2	7	13	★	★
UK	V	12.48	3	—	1	2	12
Spain	V	14.32	3	4	1	11	★
Tunisia	H	25.73	1	5	3	★	★
Kenya	T	15.50	2	1	7	5	★
Morocco	T	2.60	4	8	2	10	★
South Africa	T	5.05	6	3	10	7	★
India	T	4.28	5	2	7	4	8
Thailand	T	5.05	6	9	11	7	2
Indonesia	T	3.68	8	7	12	6	3
Australia	V	3.27	5	4	9	3	1
New Zealand	V	3.55	5	4	★	2	3
US	T	3.34	5	4	6	—	3
Canada	T	1.84	5	2	4	1	3
Brazil	T	4.80	5	15	7	2	12
Venezuela	T	7.70	5	10	9	1	★

Source: WTO 1993.
★ Not among top 15.
(+) H = hotel arrivals; T = tourist arrivals at border; V = visitor arrivals at border.

German market are of major concern to many countries.

The present study provides an overview of changing outbound travel patterns of German leisure tourists. It highlights a 20-year trend from 1973 to 1992 with an emphasis on current changes since unification. In addition, the need to collect more outbound data by all countries will be addressed.

OUTBOUND TOURISM

The international tourism literature and data provision is largely centred on inbound tourism. Tourism development is often measured in tourist arrivals at a given destination with little emphasis on changes, other than economic, in the source countries contributing to such patterns. The World Tourism Organization (WTO) provides almost exclusively data on inbound tourism and so does *International Tourism Quarterly*. An exception is the *EIU Travel and Tourism Analyst* which also has an outbound section besides the obligatory discussion of inbound tourism. Yet modifications in outbound travel patterns can have tremendous effects on destination countries as the example of Japan (and more recently South Korea, Hong Kong and

Taiwan) demonstrates. Owing to a lack of awareness of such changes in outbound tourism in the countries aforementioned, the surge of tourist arrivals from these countries in the late 1980s and early 1990s came as a surprise to some Pacific Rim destinations. And it is only a question of time until other parts of the world will experience similar increases, if not quite as voluminous, of Asian travellers, as these tourists start to explore other countries and regions. Japan is already among the top ten source markets for Switzerland, Italy and France (Table 1). Not only absolute numbers of tourist arrivals are changing but also the type of traveller as tourists become more experienced and more sophisticated. The changing type of traveller has been addressed by Plog, who forwarded an update of his 1973 'psychographic position of destinations'.[7] The position of several destinations had shifted towards the psychocentric end of the axis. Miami Beach, for example, moved from a near-psychocentric to a psychocentric location over the two decades.

'In comparing the two charts, a trend becomes apparent — the sure but steady movement of most destinations towards more psychocentric characteristics, and audiences that they attract . . . What was once a grand place to visit loses favor as it attracts a lower-quality audience and fewer people.'[8]

Plog's last statement, however, was not supported by data. According to his model, Miami Beach should attract only as many (American) tourists as Nepal or Tibet, which is obviously not the case. Hence, Plog's bell-shaped curve requires some alterations although his concept may be a useful analytical tool in determining the comparative position of destinations with respect to specific source countries.

Another useful tool in analysing the competitive position of a destination is the 'Travel Life Cycle' model forwarded by Oppermann.[9] Destinations are evaluated according to their preferential status over the life cycle of an individual (age axis) and with regard to successive generations. If a destination is in less favour among the younger generations and loses attractiveness as individuals progress through their life cycle, then it will face decreasing tourist arrivals if it does not manage to attract a new clientele or change its image.

Regrettably Plog's tools to measure the psychographic location have never been made available to the public[10] and it is, therefore, impossible to apply them in other settings. Longitudinal studies of travel patterns as required in Oppermann's model are just starting to emerge with no comprehensive data yet available for any country. Hence, the present study has to rely on more traditional annual statistics of German residents' destination choice. One problem arising for surveys of outbound travel patterns of countries like Germany is the impracticability of carrying out surveys to measure flows across well-travelled borders.[11] Thus, household surveys are usually employed with all their limitations (eg recall bias). Another difficulty in measuring outbound tourism, specifically outbound destinations, is that many travellers are on a multi-country itinerary. German tourists travelling by car to Italy, Greece or Spain, for example, have to cross at least one other country on their way and may stay there overnight. When travelling to long haul destinations it appears even more common to be involved in a multi-country itinerary.[12] Thus, a classi-

fication problem may arise as to which country was visited. This is commonly circumvented by choosing the most important destination country.

METHODOLOGY

The study is based on secondary data collected by the Studienkreis für Tourismus (StfT) in its annual surveys of approximately 6,000 residents. It is one of the most consistent sources available in Germany covering a relatively long time period. Unfortunately, the Studienkreis was dissolved in 1993 owing to disputes among its members with regard to finances, structure and goals. If, when, and in which form a similar survey is undertaken and how regularly the survey will be conducted awaits to be seen. However, surveys by the StfT covers more than 20 years from 1970 to 1992. Since it was a nationwide survey, the data do not cover East German travel patterns until 1989. Consequently, the discussion of changes in East German travel patterns is based on the years 1990 to 1992, a three-year period immediately following the fall of the Wall in late 1989 and unification in October 1990.

The annual surveys included some core questions that were asked every year (eg travel intensity, travel frequency, travel destination, type of accommodation and transportation used) and an extension part with a specific topic each year (ie perception of environmental impact in destination countries, travel expenditures, etc). The basic conditions of the StfT survey which one should be aware of are: first, trips for other than primarily pleasure purposes (ie business trips, visits for friends/relatives) are not included. Second, it covers only German citizens who were at least 15 years old. Third,

only trips lasting more than four days are included. Hence, all short break holidas are excluded from the analysis. However, there are numerous such trips,[13] for example, a weekend mountain climbing trip to Austria or Switzerland. Commonly coach tours to Paris, Prague or as far as Barcelona are offered for just two to four days. In 1990, the StfT estimated Germans participated in some 25 million short trips of two to four days.[14] Fourth, only data on the main vacation trip are usually discussed in the main publication with cross-tabulation of most data being available to participating sponsors of the survey. In case respondents had travelled several times during one year, they were asked to declare their primary vacation trip. Fifth, the surveys were executed once a year, in January following the year in question. Hence, recall bias may be a factor especially with respect to the first few months of the year in the survey.

RESULTS

Travel intensity and frequency

Travel intensity denotes the percentage of respondents who travelled at least once in any given year, while travel frequency is a measure of the number of vacation trips per year. Travel intensity of German residents has increased steadily from 41.6 per cent in 1970 to 71.1 per cent by 1992 (Figure 1). Two periods of decrease can be noted in the mid-1970s and the early 1980s. Both periods followed the two oil crises and coincided with times of slower economic growth in Germany. Travel intensity is strongly related to education and income level: the higher the respondent's education level and income level is, the greater the propensity to travel. For example, at least 86 per cent

Figure 1 Travel intensity and frequency, 1970–1992 (in %)
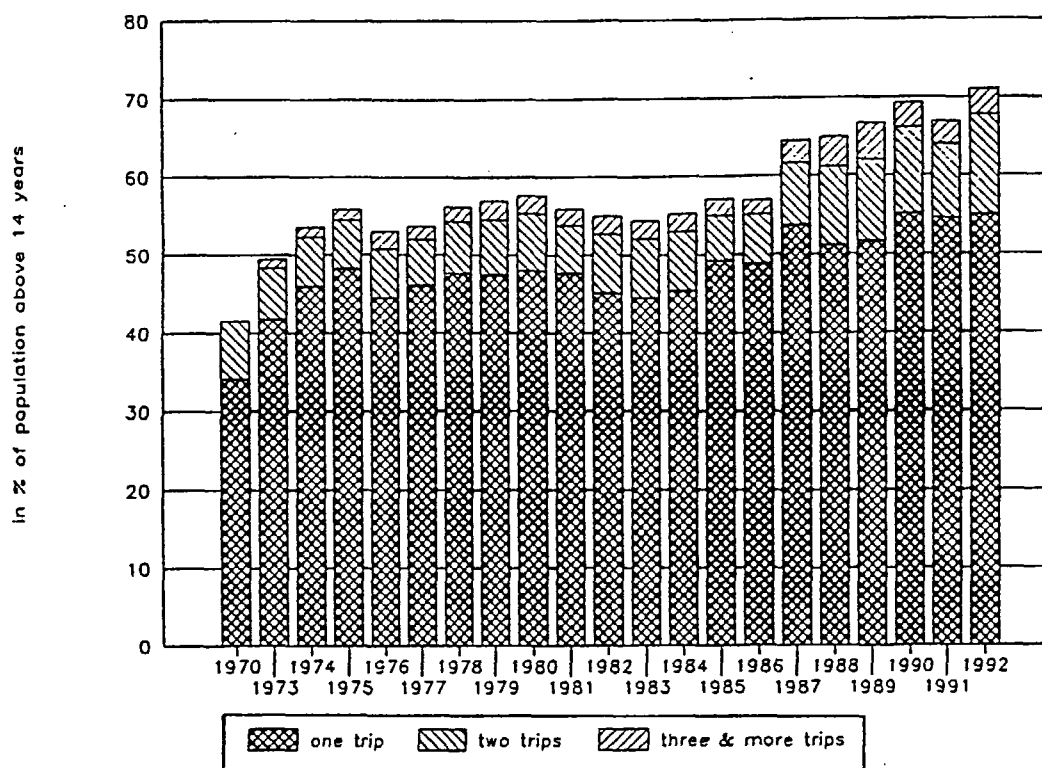
Source: StfT various years (see ref. 19).

of those respondents with a monthly household net income of more than DM5,000 (US$3,000) took at least one vacation trip in 1992. On the other hand, only 50 per cent of those with a monthly household net income of below DM1,500 (US$900) took at least one vacation trip during the same year (Table 2). This suggests that although the less well-endowed respondents travelled a lot less, vacations are still an important part of their life style and financial resources are set aside for travelling. East German respondents had a higher travel intensity than their West German counterparts. It may be attributed to the 'catch-up-effect': East Germans want to make up for all those years when they were not allowed to move so freely. While the differences are relatively small for most income categories, they are large in the categories from DM1,500 to DM3,999. One reason for this is the lower average income in East Germany, which was in 1992 around 70 per cent of the West German average. On the other hand, cost of living in East Germany is also generally lower so that a lower income group in East Germany, compared to their Western counterparts, had relatively more disposable income available for travelling.

Besides the trend towards an increasing travel intensity, a tendency towards a higher travel frequency is obvious. In 1992, 16.1 per cent of the respondents went on at least two vacation trips and

Table 2: Travel intensity by monthly household net income, 1992

Income in DM	Total (%)	West Germany (%)	East Germany (%)
< 1500	49.7	48.1	52.2
1500–1999	56.6	51.1	70.2
2000–2999	66.4	64.8	70.5
3000–3999	72.5	70.1	81.3
4000–4999	78.5	78.0	82.0
5000+	85.6	85.5	86.1

Source: StfT 1993 (see ref. 14).

3.3 per cent on three or more (Figure 1). This represented an increase of 9.9 per cent and 2.3 per cent respectively from ten years ago. Hence, almost every sixth respondent went on at least two vacation trips lasting five days or longer not counting shorter travel or non-pleasure trips.

To facilitate an international comparison of total number of international trips generated, Hudman and Davis employed the 'Country Potential Generating Index (CPGI)'.[15] It relates trips generated to the country's population. In addition, it is related to the number of trips generated worldwide and the world's population. Hudman and Davis's results showed that although Germans generated the largest number of trips in 1990 followed by US and UK residents, the CPGI was higher in Switzerland, Austria, Belgium, Portugal, Netherlands and Luxembourg. Due to a smaller total population in these countries, however, they generated far fewer international trips. Nevertheless, Germany emerged as a very competitive outbound generating country despite its reduced standing as compared to 16 years earlier. In 1974, both West and East Germany were topping all other countries.[16] The increasing number of Far Eastern outbound markets among the top 50 between 1974 and 1990 is obvious. In 1990, Hong Kong (21st), Taiwan (30th) and South Korea (44th) were 'new members', while Japan improved its ranking to 34th. In comparing them with European countries one needs to recognise that all of these Far Eastern countries are physical or political 'islands' and international travel, therefore, generally means 'air travel'. In Europe, on the other hand, most international travel is undertaken by car and is, therefore, much less costly.

Travel destination choice

Of major concern to most destination countries are preference trends in the markets with regard to destination choice. The main development has been an increase in main vacation trips to foreign destinations. In 1970, there was an even split between German and foreign destinations. Since the late 1980s almost 70 per cent of all main holiday trips were to places outside Germany (Figure 2). Again, as with travel intensity, there were periods of decreasing travel to foreign destinations in the mid-1970s and early 1980s. East German residents have drastically altered their destination choice in the years between 1990 and 1992. The percentage of trips to foreign countries more than doubled from 24.8 per cent (1990) to 54.7 per

Figure 2 *Domestic versus foreign destinations, 1970–1992 (in %)*
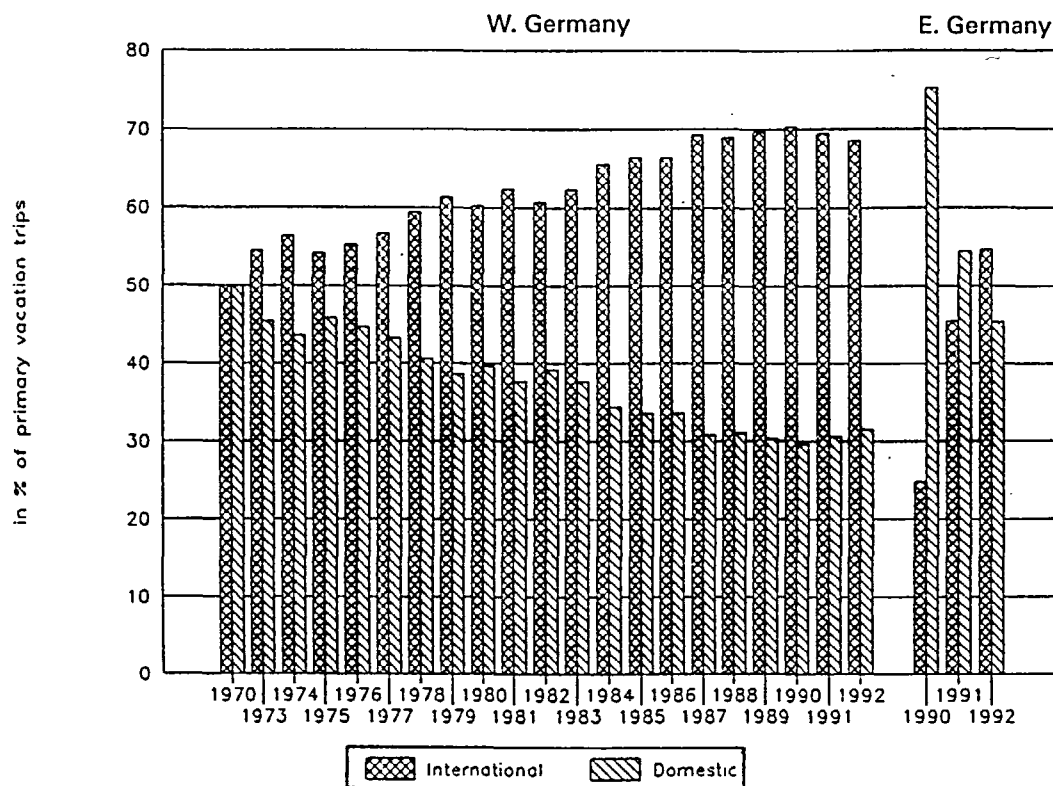
cent (1992).

Figure 3 portrays the importance of the German outbound market on a global scale. Considering the importance of Japan's outbound market, which has elicited most interest in the last decade, statistics on Japanese outbound tourism are also included for comparison purposes. Those countries where Germany or Japan represent one of the five most important source countries are highlighted.

For most Western and Eastern European countries Germany is the most important market. Obviously there seems to be a distance decay effect with respect to the importance of the German tourist market: the farther away the less important. Yet, while this

explanation appears acceptable on a European scale, the less coherent distribution on the world scale suggests that other factors are also at work. Tunisia, Yemen, Sri Lanka, the Maldives and Thailand are countries where German tourists provide the largest share of hotel bookings. Although Germany is only the sixth-ranked source country of tourist arrivals for Thailand (Table 1), the longer period of visitation by German tourists, their active intranational travel pattern, and their choice of hotels as accommodation results in the fact that they account for the largest number of hotel bookings. This discrepancy also indicates the importance of discriminating between different 'measures' owing to variations in travel

Figure 3 Familiarity with travel destination (in %)

Rank	Europe	Africa	Americas	Oceania	Asia
1.	Austria (H) Bulgaria CSSR (V) Denmark (A) France (T) Hungary (H) Iceland (T) Italy (H) Liechtenst. (H) Macedonia (T) Netherlands (H) Norway (N) Poland (V) Spain (H) Sweden (N) Switzerland (H) Yugoslavia	Egypt (V) Maldives (T) Tunisia (H) Turkey (H) Yemen (H)		*Australia (V)* *Guam (T)* *New Caledonia (T)*	*Bhutan (T)* *S. Korea (V)* *Taiwan(V)* Sri Lanka (T) Thailand (N)
2.	Finland (H) Greece (T) Luxemb. (H) Malta (T)	Israel (T) Kenya (T) Madagascar (T) Morocco (N) Nigeria (H '91)	Cuba (V) Venezuela (T)	*Hawaii (T)*	China (T) Hong Kong (V) Indonesia (T) Macao (V) Philippines (V) Singapore (T) Thailand (T)
3.	Cyprus (T) Ireland (T) Portugal (T) UK (V)	Burk. Faso (H) Cameroon (H) Chad (H)	Barbados (T) Grenada (H) St. Lucia (H) *Canada (T)* *USA (T)*	*Fr. Polynesia (T)* *Fiji (T)* *New Zealand (V)*	*Malaysia (T)* Bhutan (T) Nepal (T)
4.	Monaco (H) USSR (V)	Mauritius (T) Seychelles (T) Tanzania (V)	Antigua (T) Bahamas (T) Ecuador (V) Jamaica (T) Peru (T)	*Fr. Polynesia (T)* Tonga (T)	*Sri Lanka (T)*
5.			Canada (T) Costa Rica (T) Guadel. (H '91) St. Vincent (H) USA (T)	*Papua New Guinea (T)* Australia (V) New Zealand (V) W. Samoa (T)	*Bangladesh (T)* India (T) Pakistan

Note: Destination for which Japan is primary market are italicised. All data — WTO 1994.
T = tourist arrivals; V = visitor arrivals; H = hotel arrivals; N = hotel nights; A = nights at all accommodations.

patterns. In Tunisia, for example, Libya provides the largest number of visitor arrivals at the border. However, with respect to hotel arrivals, it is not even among the top ten markets. Hence, its economic impact is not felt as much in the hospitality industry owing to the shorter length of stay and choice of other accommodation forms. Thus, to judge the importance of a market by the number of arrivals at the border alone may be a misleading indicator possibly

resulting in misdirection of valuable promotion campaigns and advertisement budgets and misguided tourism planning.

The importance of the distribution pattern in Japan also shows some distance-decay tendency. It indicates that Japanese outbound tourism is currently largely felt in Pacific Rim countries and to a lesser extent in Europe or Africa. Although a considerable number of Japanese tourists visit Europe each year, their absolute numbers do not elevate Japan to a position in the top five generating countries. Africa and Latin America, on the other hand, still expect to receive Japanese tourists in larger numbers.

In absolute numbers, Spain was the most favourite foreign country for West German respondents followed by Italy, Austria and France (Table 3). In 1992, every eighth person's primary vacation trip led to Spain, representing 18.4 per cent of all trips to foreign destinations. This has not always been the case. Until 1980 Austria was the most visited country. Although its share of total trips was 15 per cent in 1970, only slightly more than Spain's 12.6 per cent in 1992, this

Table 3: Travel destination choice (in % of primary holiday trips)

Year	AU	IT	SP	FR	West Germany YU	GR	CH	NL	TU	NA
1970	15	12	5	2	2	2	2	2	na	na
1973	15.2	9.4	7.0	3.3	3.9	1.3	2.4	2.3	na	na
1974	15.1	9.0	8.7	3.5	4.0	0.9	2.7	2.1	na	na
1975	15.1	8.8	8.5	3.7	3.6	1.4	2.1	1.9	na	na
1976	16.0	8.3	7.7	4.2	3.8	1.1	.2.2	1.6	na	na
1977	12.6	9.5	10.2	5.1	3.2	2.1	1.8	2.1	na	na
1978	12.7	10.1	10.5	5.3	4.1	2.2	2.0	2.3	na	na
1979	12.7	11.3	10.2	4.5	36	2.5	1.7	2.2	na	na
1980	13.0	9.9	9.2	4.3	4.3	2.2	2.8	1.8	na	na
1981	13.0	10.7	10.3	6.1	3.8	2.7	1.9	2.3	na	na
1982	9.9	12.0	11.1	5.3	4.2	2.3	1.5	2.2	na	na
1983	11.7	12.9	10.5	3.7	3.6	2.4	2.1	1.5	na	na
1984	9.7	13.2	10.9	5.5	4.2	2.9	2.7	2.1	na	na
1985	9.6	12.3	11.5	5.4	6.0	3.1	2.1	1.8	0.4	na
1986	9.3	12.3	12.6	5.3	5.5	3.4	1.5	2.2	0.7	na
1987	9.7	12.4	13.5	5.8	5.1	3.8	2.1	2.0	1.3	na
1988	8.2	11.3	11.7	6.6	5.0	3.4	1.9	1.9	2.5	na
1989	9.2	11.1	13.5	5.3	4.2	3.5	1.8	2.4	2.3	na
1990	7.0	10.2	13.0	5.9	5.3	4.2	1.6	2.4	2.5	2.4
1991	8.8	10.5	13.8	5.8	0.9	4.0	1.6	3.1	2.8	2.4
1992	6.8	9.7	12.6	5.8	0.7	4.6	1.7	1.9	3.1	3.2
					East Germany					
1990	4.3	2.5	3.0	1.4	0.5	0.6	0.4	0.6	★	0.2
1991	9.8	4.9	7.4	2.3	★	1.2	1.1	1.5	0.5	0.8
1992	10.3	4.7	6.2	3.9	★	2.4	1.7	2.9	0.8	0.7

Source: StfT, various years (see ref. 14).
Note: AU = Austria, IT = Italy, SP = Spain, FR = France, YU = Yugoslavia, GR = Greece,
    CH = Switzerland, NL = Netherlands, TU = Turkey, NA = North America.
★Below 0.1%.

represented 30 per cent of all vacation trips to foreign countries. The large increase in the number of foreign vacation trips is causing this discrepancy. The 30 per cent is also an indicator of the dominant position Austria once held with regard to German outbound tourism.

In the early 1980s Austria was replaced by Italy as the most popular destination for Germans, which in turn lost the top position to Spain in 1986. Spain's share appears at its peak, however, and it remains to be seen if, when, and by which country it will be replaced. A similar analysis was offered by Ashworth[17] who, in a comparison of Mediterranean countries, placed Spain on the declining branch of the product development curve.

The decrease in the number of primary vacation trips does not necessarily imply, however, that a destination receives fewer tourists from Germany today than it did some years ago. The increase in travel intensity and travel frequency at least partly offsets losses from primary trips. Austria, for example, attracted a total of 3.2 million German tourists in 1990. This is only slightly less than the 3.4 million in 1970, although Austria's share of main vacation trips dropped from 15.2 per cent to 7.0 per cent in the same time period. Hence, while its share dclined, the

number of Germans visiting Austria remained almost the same.

A rapid alteration of travel destination preferences among East German residents can be observed between 1990 and 1992. All foreign destinations are benefiting from an increase in East German tourists. Among foreign destinations, Austria is most favoured by East Germans followed by Spain and Italy. The strong showing of Austria is explained by its proximity, lack of language barriers (East Germans are less fluent in Western languages than their West German counterparts), and a favourable value perception. East German residents are first exploring destinations that are more familiar and less expensive. Spain's lead over Italy is most likely the effect of the large number of inexpensive package flights to the Balearic Islands, Canary Islands and mainland Spain, which makes a holiday there more affordable.[18]

Travel inertia and destination familiarity

Although Germans are travelling to a wider variety of countries, a high travel inertia can still be observed. The majority of all trips are to destinations that they had visited previously. A large number (26.9 per cent) of tourists reported that they had visited their destination more than three times in the

Table 4: Familiarity with travel destination (in %)

| Year	First time visit	1–2 previous visits	3 or more previous visits
1976	48.2	26.6	24.3
1984	40.7	213.3	35.0
1988	41.3	25.6	32.5
1992 (West)	47.1	25.4	26.9
1992 (East)	69.0	1.2	11.3

Source: StfT various years (see ref. 14).

past (Table 4). Among East German respondents this figure is naturally not quite as high owing to the drastic changes in destination availability since unification.

Another aspect of destination familiarity is previous travel experience with any destination country, not only the one visited on the last vacation. In 1974 and in several surveys in the late 1980s respondents were asked which countries they had previously visited (Figure 4). The results indicate an ever-growing familiarity with many destination countries for a large proportion of West German respondents. In 1988, for example, 57.8 per cent stated that they had visited Austria at least once during

their life. This was up from 36.6 per cent in 1974. More than one third of Germans had previously travelled to Spain, Italy and France. Almost 10 per cent of the surveyed population had some travel experience with destinations in Tunisia, Africa and North America as compared to 0.8 per cent, 1.9 per cent and 1.4 per cent 16 years earlier. This indicates the expansion of the German 'tourist sphere'. Unfortunately, the 1990 survey was not completely comparable to surveys in earlier years because destinations were grouped differently. It allows, however, for a comparison of West and East German respondents. It shows how novel many destinations (mostly in the Western countries) were

Figure 4 Changing travel familiarity with selected destinations
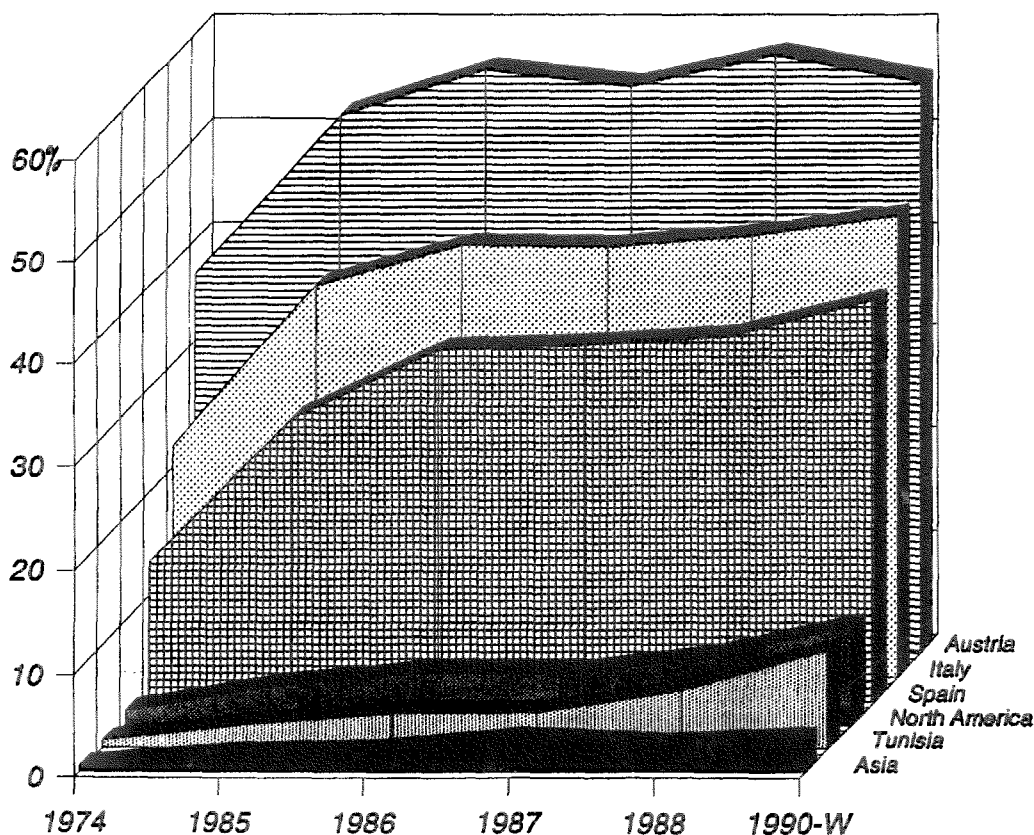
Source: StfT various years (see ref. 19).

to East German travellers in the year after the fall of the Wall. Only 8.3 per cent stated that they had visited Austria (including visits in 1990).

Figure 4 also suggests that even a country such as Austria has not managed to penetrate more than 60 per cent of the potential German market. Although three million Germans visit Austria every year many of them are return visitors. Thus, Germany still provides for a large untapped market which may just need to be explored. And it may be easier and less expensive to attract some of these German travellers than to turn to countries overseas.

DISCUSSION

The present study analysed German outbound travel patterns over a 20-year period from 1970 to 1992. It reveals an increasing travel intensity coupled with a growing travel frequency of trips overall. Further, a growing proportion of trips were foreign destinations. But the growth in outbound tourism was not experienced equally among all foreign destinations. Destination countries seem to progress through a destination area life cycle as suggested by both Butler and Plog.[19] Austria and Italy used to be the most preferred foreign destinations for Germans. In 1992 Spain replaced the position. Unfortunately the published data do not differentiate vacation preferences by age cohorts or other variables. This would allow for an analysis of the travel life cycle as suggested by Oppermann[20] leading to an examination of the market segments of a destination to determine whether they are more life cycle or more cohort oriented.

The tremendous increase in destination familiarity has considerable implications on marketing efforts by destination countries. On one hand, the number of Germans with previous experience of each destination is increasing, which results in a higher destination awareness and greater exposure to word-of-mouth communication. On the other hand, increasing travel experience in a number of different countries gives the potential traveller a much better first hand comparison of countries, possibly resulting in fewer repeat visits while seeking other new destinations each year. Hence, there are increasing costs involved in attracting new customers instead of repeat visitors. In this context it would be helpful if longitudinal data on 'travel careers'[21] or individual travel life cycles[22] were available. The remaining high travel inertia with a considerable share of German travellers returning to the same destination suggests that the German market can be split into at least two different market segments. One of the market segments will consist of those travellers who are returning to the same destination year after year. Another segment seems to be at the other end of the spectrum, namely those travellers who visit new destinations every year, perhaps only returning to previously visited places on their second or third vacation trip. The standard practice of gathering cross-sectional data on travel (eg only trips on the year in question and not over the life-span of the respondent) does not allow for such a segmentation analysis. Yet, the identification of segments as mentioned above could improve the effectiveness of the destinations' marketing efforts.

THE NEED FOR MORE OUTBOUND DATA

The above example of German outbound tourism indicates the usefulness of collecting such data. Availability of

detailed outbound data not only helps destination countries in identifying trends in its markets but also travel agencies and tour operators from the origin countries in pin-pointing trends, motives and segments beyond their own customers. Provided sufficient data are collected, specific segments can be recognised and consequently targeted. While most use will be achieved by reciprocal exchange of the wealth of data between NTOs, the collecting NTO can also make use of that data for its own marketing efforts. Not only will it collect detailed data on domestic tourism trends, which in most cases is the more important part of the tourism industry anyway, but by analysing why and where clients travel internationally, they can adjust their marketing strategies in an effort to redirect travel flows toward domestic destinations. Currently, most NTOs do not even know why their own clients actually travel overseas and much more financial effort is invested into attracting international tourists rather than redirecting some outbound flows toward domestic destinations.

Implementation of a standardised data collection procedure in all countries will greatly enhance the current availability of inbound statistics by complementing them with outbound data. Using a household survey, a sufficient number of residents should be interviewed regarding their respective travel during the past year. A household survey is preferable to an exit survey since it will include all non-travellers and will exclude a sampling bias towards the more frequent travellers. Given the almost worldwide acceptance of the World Tourism Organization's (WTO) definition of tourists, the survey should also cover business and educational trips and not only pleasure trips as in the

StfT surveys. The trend towards more and more short trips and all trips lasting more than 24 hours and a stay away from one's usual home should be included. The questionnaire should address the issues of number and length of trips, destination, travel organisation and motive, information sources used, travel and accommodation mode, familiarity with the chosen destination and with selected other destinations in general, travel expenditure for the whole trip and for individual components, and activities at destination.

In conclusion, there appears to be a dire need for more outbound data. NTOs are called upon to reassess their current data collection procedures, data needs, and potential applications of data. They are also called upon to make more use of the data already collected or at least provide access to such data to tourism researchers and practitioners.

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