

**Add.
module**

**Impact of
COVID-19**

specifically on the
willingness to visit
your destination

**Analogous
and repetitive**
to Destination
Brand 20

DESTINATION BRAND 21

ADDITIONAL MODULE

IMPACT OF THE CORONAVIRUS PANDEMIC

Short introduction of the additional module

- ▶ **Note:** The following presentation serves as a short introduction of the additional module on the impact of the coronavirus pandemic in the framework of the study DESTINATION BRAND 21. Adaptations or updates regarding the scope, the contents and the visualisation of the additional module are possible.

The additional module

What is the main added value for you?

The current study year 2021 is also subject to very special conditions due to the coronavirus pandemic.

In light of this, the corona-related impact on general travel intentions and attitudes, as well as on the destination-specific willingness to visit in the short and medium term, continue to be a particular focus of interest.

Based on the methodology of the brand value study Destination Brand 20, the additional module offers you comprehensive scientifically-founded insights concerning this topic.

The additional module offers you concrete answers to the following key questions

Investigation focus 1

General travel intention and corona-related shifts of attitude

- How high is the general (i.e., regardless of a specific destination) domestic or international travel intention of the respective source market?
- To what extent has the attitude of the respective source market towards different aspects of travel changed as a result of the coronavirus pandemic?

Investigation focus 2

Future willingness to visit your destination

- How high is the willingness of the respective source market to visit your destination for short trips and longer holidays within the next 12 months and 3 years?

Investigation focus 3

Impact of the coronavirus pandemic on the interest to visit your destination

- What impacts does COVID-19 have on the visitor interest of the respective source market in your destination within the next 12 months and 3 years?
- Due to the coronavirus pandemic, has the interest of potential guests to visit your destination decreased, increased or remained the same?

The additional module

Further important general facts

Key Facts:

- **Methodology and schedule similar to the measurement of the theme competence:**
 - **10 source markets:** DE | AT | CH | NL | CN | FR | IT | ES | UK | US
 - **Online-survey** in national language (quota sample) in Oct. / Nov. 2021
 - **High number of cases:** At least 1,000 respondents per destination per source market
 - **Representative** of the local population living in private households (in China: urban and with affinity to travel abroad) between 14-74 years (different, country-specific age ranges possible)
 - **Data preparation:** For the additional module one report per source market will be prepared (PDF-file)
 - **Data delivery:** First extract February 2022, complete report from the end of March 2022 onwards
- **Possibility to order:** A precondition for ordering the additional module is that an individual report on theme competence in the respective source market has been booked.
- **Target group analysis:** A fixed component of the additional module is a standard target group analysis for investigation focus 2 and 3 according to up to 6 individually selected target groups. Additionally for the **source market Germany** target group analyses according to the “Sinus-Milieus[®] Germany / -Meta-Milieus[®]” and / or the “BeST types of holidaymakers” can be booked.
- **Competitor analysis:** If a competitor analysis can be implemented, depends on the specific order situation of the additional module in the respective source markets.

Exemplary outline for the additional module

1 OVERVIEW OF THE STUDY SERIES DESTINATION BRAND

2 DESIGN OF THE ADDITIONAL MODULE ABOUT THE IMPACT OF THE CORONAVIRUS PANDEMIC

- 2.1 Method of the additional module about the impact of the coronavirus pandemic
- 2.2 Overview of the considered destinations

3 GENERAL TRAVEL INTENTION AND ATTITUDE SHIFTS

- 3.1 General travel intention
- 3.2 General attitude shifts due to the coronavirus pandemic

4 FUTURE DESTINATION-SPECIFIC WILLINGNESS TO VISIT

- 4.1 Results of univariate analyses
- 4.2 Standard target group analysis
- 4.3 Competitor analysis

5 IMPACT OF THE CORONAVIRUS PANDEMIC ON VISITOR INTEREST

- 5.1 Results of univariate analyses
- 5.2 Standard target group analysis
- 5.3 Competitor analysis

6 CONTACT AND PROJECT PARTNERS

7 APPENDIX

- 7.1 Reading examples
- 7.2 Glossary
- 7.3 Margin of error
- 7.4 List of literature regarding the overview of the study series Destination Brand

IMPRINT

Investigation focus 1

General travel intention and corona-related attitude shifts

Key Facts:

- **Destination-independent:** With the travel intention and the corona-related attitude shifts, investigation focus 1 offers a **general (i.e. regardless of a specific destination) assessment of potential of the respective source market.**
- **Time comparisons:** For a better classification of the results, you will also receive time comparisons to the study year 2020 for both contents of this investigation focus. In the case of the intention to travel abroad within the next 3 years, comparisons to the year 2018 are also included for the source markets DE | AT | CH and NL, as well as the additional years 2009, 2012 and 2015 for the intention to travel domestically within the next 3 years for the source market DE.
- **Travel intention:**
 - The general intention to travel domestically or internationally of the respective source market is measured with regard to **short trips** (1 – 3 overnight stays) and **longer holiday trips** (4 overnight stays or more) within the **next 12 months** and **3 years.**
 - When ordering the additional module for your own country (e.g., a German destination books for the source market Germany), you will receive the survey results on the domestic travel intention – when booking for an international source market, correspondingly on the intention to travel abroad.
- **Corona-related attitude shifts:** This section deals with the question to what extent the respondents are going to focus on a total of 8 different general attitudinal aspects of travelling in the future due to the corona-virus pandemic (e.g., familiarity with the holiday region, hygiene, number of infections, avoidance of contacts).

4.1 General travel intention

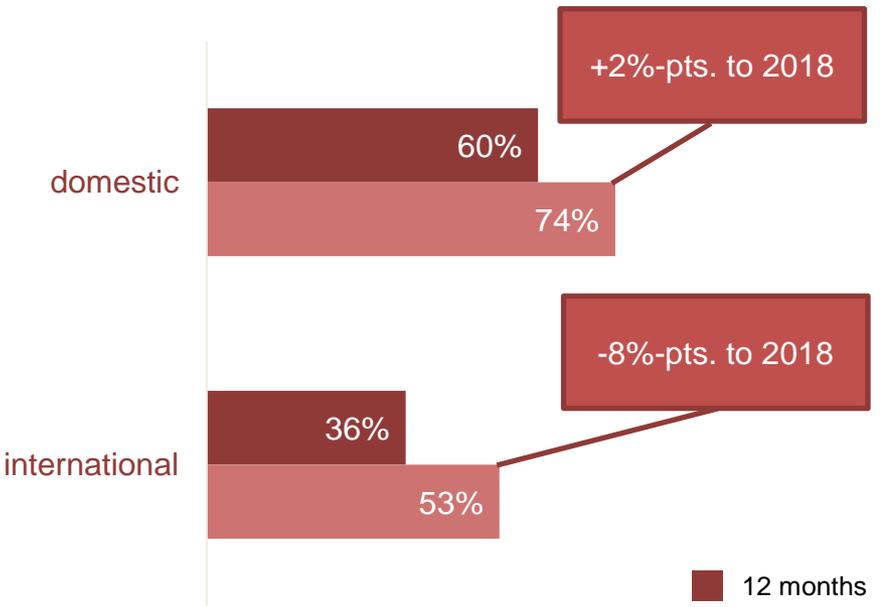
General travel intention

> Do you intend to travel internationally / in Germany within the next 12 months / 3 years?
> Top-Two-Box on a scale of "4 = definitely" to "1 = definitely not" (values in % of respondents)

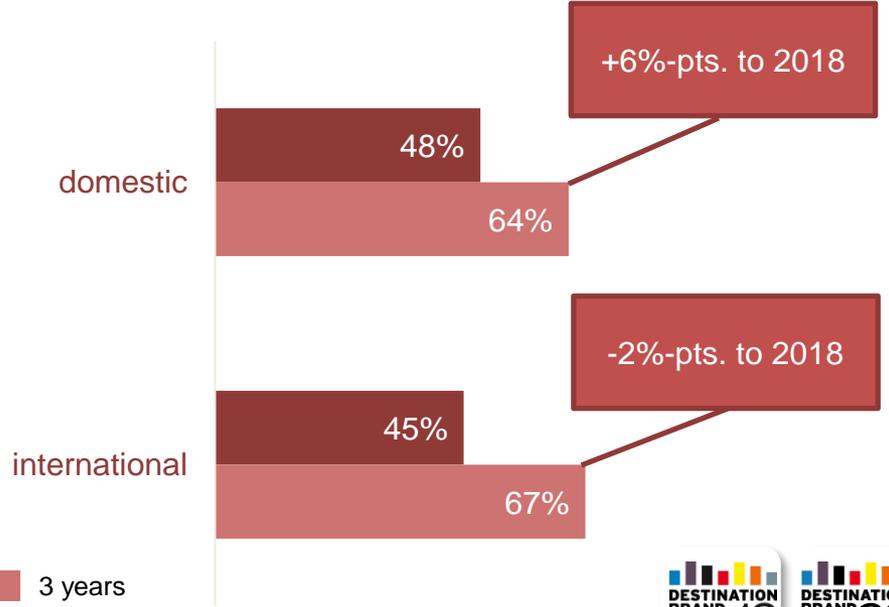
General travel intention

Source market: Germany
Base: All respondents
Number of respondents: min. 4,000

Short trips (1 – 3 overnight stays)



Longer holiday trips (4 overnight stays or more)



Source: inspektour (international) GmbH / DITF of the FH Westküste, 2018 / 2020



4.2 General attitude shifts due to the coronavirus pandemic

General attitude shifts due to the coronavirus pandemic

> Based on experiences from the past few months that were shaped by the rapid spread of the coronavirus and the measures taken to minimise the number of infections, what are you going to focus on in the future concerning holiday trips?

> Top-Two-Box on a scale of "5 = I fully agree" to "1 = I fully disagree" (values in % of respondents)

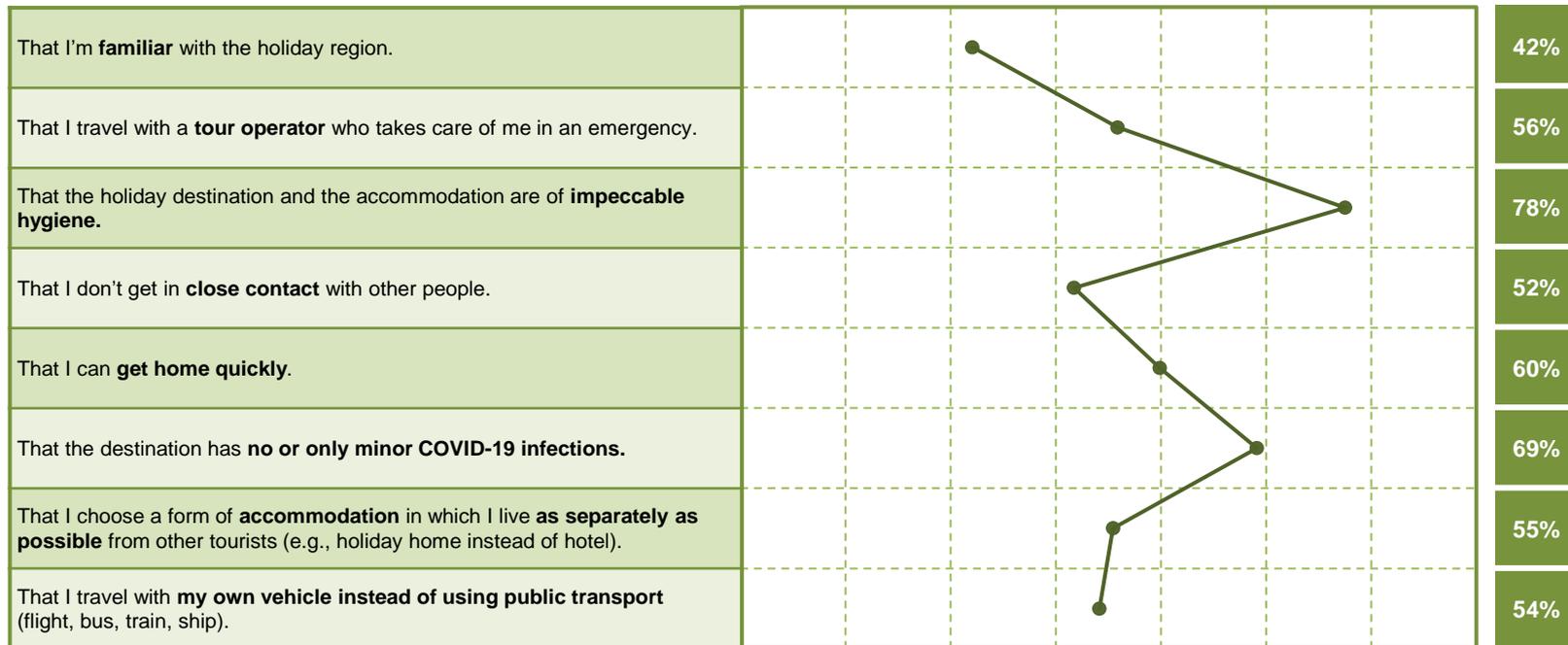
Attitude shifts

Source market: Germany

Base: All respondents

Number of respondents: 19,000

20% 30% 40% 50% 60% 70% 80% 90%



Source: inspektour (international) GmbH / DITF of the FH Westküste, 2020

Investigation focus 2

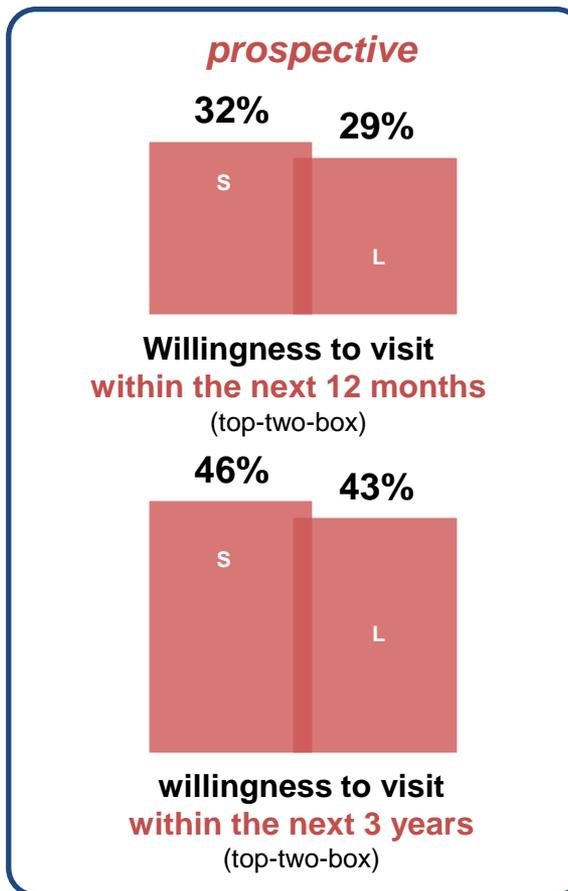
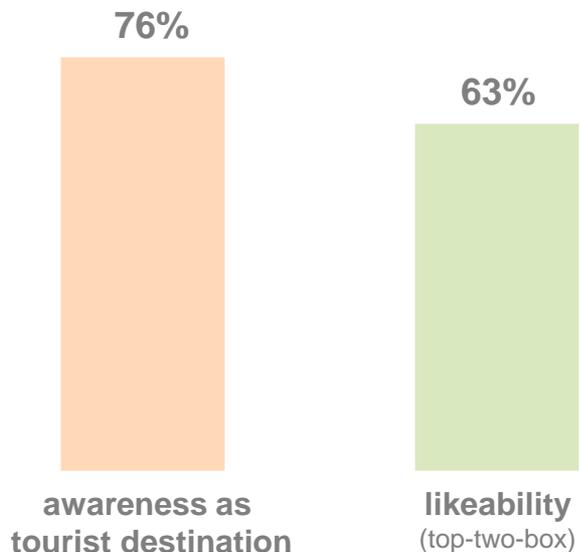
Future willingness to visit your destination within the next 12 months and 3 years

Key Facts:

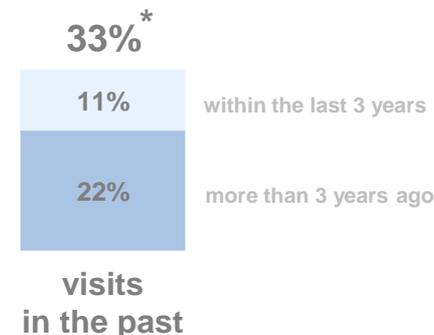
- **Positioning in the Destination Brand study series:** Within the framework of this investigation focus, the **3rd level of the four-dimensional brand funnel model** is measured, which is normally a component of the **brand value study** of Destination Brand (see following figure). The 3rd level indicates the future destination-specific willingness to visit of the respective source market. This makes it **an important indicator for assessing the potential of your destination**.
- **Time comparisons:** For a better classification of the results, you will also receive time comparisons **to all brand value studies of Destination Brand conducted in the past** (study years 09, 12, 15, 18 and 20), in which the future willingness to visit your destination has already been surveyed in the respective source market – **regardless** of whether you had booked a report in the respective study year or not. You can find out the **survey status** of your destination in previous study years from us.
- **Willingness to visit:** The willingness of the respective source market to visit your destination is measured with regard to **short trips** (1 – 3 overnight stays) and **longer holiday trips** (4 overnight stays or more) within the **next 12 months and 3 years**.

Future willingness to visit your destination

The evaluation contents at a glance



retrospective



Brief explanation:

In the context of this investigation focus, the **3rd level of the four-dimensional brand funnel** is measured, which is normally a component of the brand value study of Destination Brand. The 3rd level indicates the future **destination-specific willingness to visit** of the respective source market. This makes it **an important indicator for assessing potential**. The underlying question is: To what extent would you consider the following destinations for a short trip / longer holiday trip within the **next 3 years** (as well as the **next 12 months**)?

Source market: Germany | Base: all respondents | Number of respondents: 1,000

* Deviations from the sum of the individual values are possible due to multiple response options related to the time of the previous holiday.

Source: inspektour (international) GmbH, 2021 (visualisation example with fictional values)



4.1 Willingness to visit – Results of univariate analyses

Willingness to visit for longer holiday trips within the next 3 years

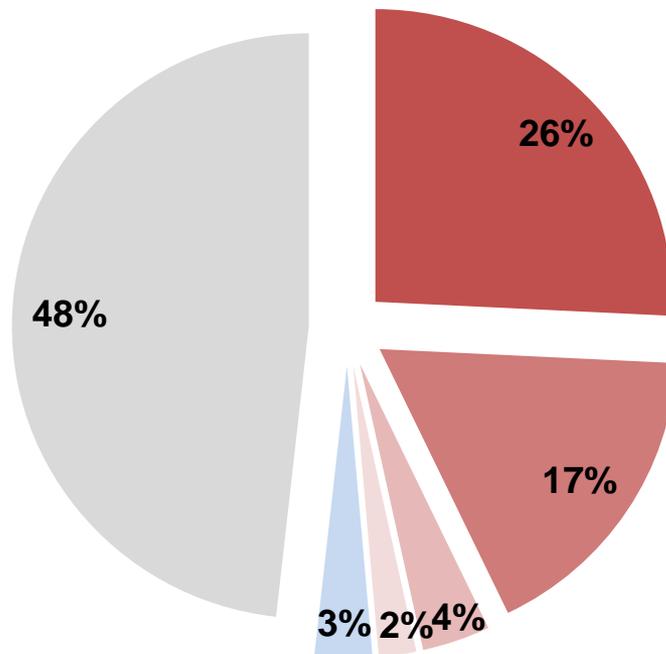
- > To what extent would you consider the following tourist destinations in Germany for a longer holiday trip (with 4 or more overnight stays) within the next three years?
- > Values (in % of respondents)

Destination XY

Source market: Germany

Base: All respondents

Number of respondents: 1,000



Ø** = 3.4

		top-two-box*
definitely considered	=4	43%
likely to be considered	=3	
		bottom-two-box*
less likely to be considered	=2	6%
not at all considered	=1	

do not know

no general intention for longer holiday trips in Germany within the next 3 years and / or destination unknown

* Deviations of 1% from the sum of the individual values are possible due to rounding.

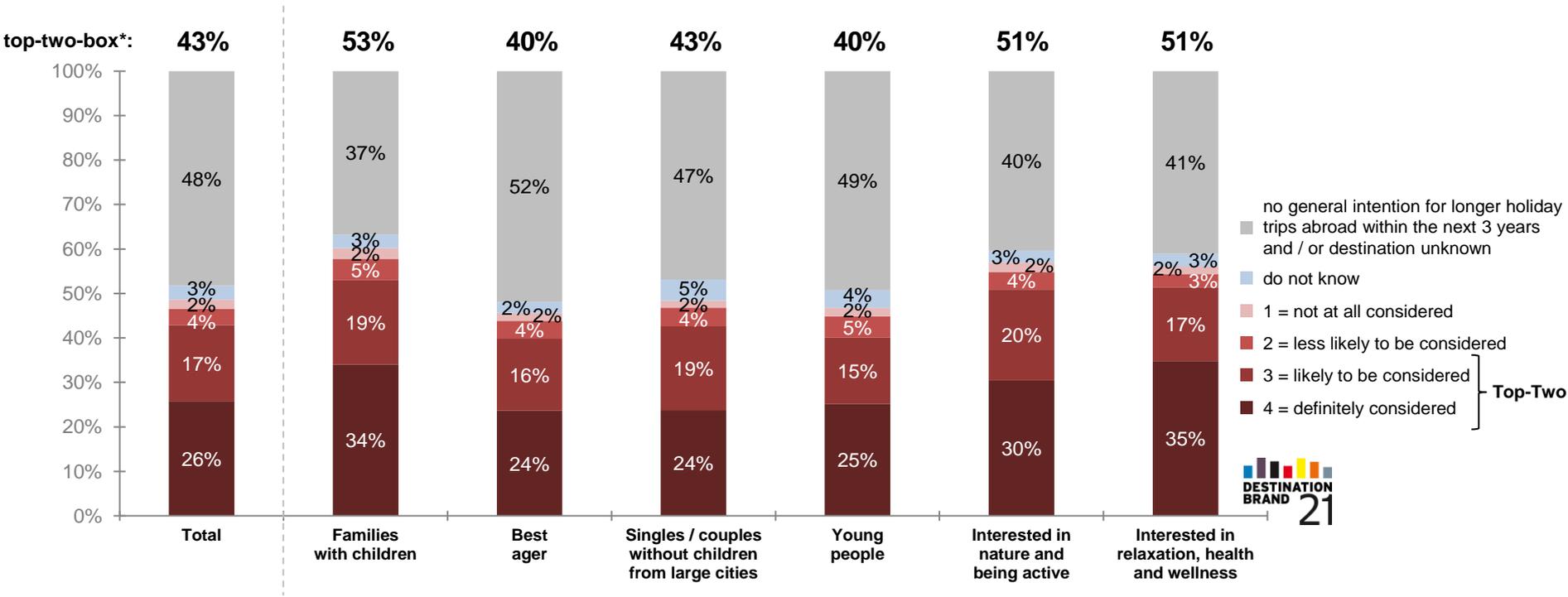
** Scale from "4 = definitely considered" to "1 = not at all considered"

4.2 Willingness to visit – Standard target group analysis

Willingness to visit for longer holiday trips within the next 3 years

> To what extent would you consider the following tourist destinations in Germany for a longer holiday trip (with 4 or more overnight stays) within the next three years?
> Values (in % of respondents)

■ Destination XY
Source market: Germany
Segmentation: Target groups
Base: All respondents
Number of respondents: 1,000



Source: inspektour (international) GmbH, 2021 (visualisation example with fictional values)

* Deviations of 1% from the sum of the individual values are possible due to rounding.

4.3 Willingness to visit – Competitor analysis: All considered destinations

Brief explanation:

Within the framework of this investigation focus, the additional module contains **detailed rankings of all the destinations investigated** on the willingness to visit within the next 12 months and 3 years (each on the base of “all respondents” and, in the case of international tourist destinations from the perspective of the respective source market, on the base of respondents with a “distinct intention to travel abroad”).

These rankings list the **names and positions of all the destinations examined, which have ordered the additional module**, while the underlying percentages are displayed exclusively for the destination that commissioned the individual report.

Willingness to visit for longer holiday trips (next 3 years)				
Source market: Germany				
top-two-box “4 = definitely considered” + “3 = likely to be considered”				
In % of respondents Base: All respondents				
Ranking in the category: All considered destinations (mean = 18%)				
1	Destination 1		24	Destination 24
2	Destination 2		25	Destination 25
3	Destination 3		26	Destination 26
4	Destination 4		27	Destination 27
5	Destination XY	Xx%	28	Destination 28
6	Destination 6		29	Destination 29
7	Destination 7		30	Destination 30
8	Destination 8		31	Destination 31
9	Destination 9		32	Destination 32
10	Destination 10		33	Destination 33
11	Destination 11		34	Destination 34
12	Destination 12		35	Destination 35
13	Destination 13		36	Destination 36
14	Destination 14		37	Destination 37
15	Destination 15		38	Destination 38
16	Destination 16		39	Destination 39
17	Destination 17		40	Destination 40
18	Destination 18		41	Destination 41
19	Destination 19		42	Destination 42
20	Destination 20		43	Destination 43
21	Destination 21		44	Destination 44
22	Destination 22		45	Destination 45
23	Destination 23		...	

Source: inspektour (international) GmbH, 2021 (visualisation example with fictional values)

Investigation focus 3

Impact of the coronavirus pandemic on the interest to visit your destination

Key Facts:

- **Time comparisons:** If your destination was surveyed as part of the brand value study Destination Brand 20 in the respective source market, you will receive a time comparison to the previous year for a better classification of the results – **regardless** of whether you booked a report in the study year 2020 or not. You can find out the **survey status** of your destination in previous study years from us.
- **Impact of the coronavirus pandemic:** The impact of the coronavirus pandemic on the interest of the respective source market to visit your destination is measured concerning the time frames of the **next 12 months** and **3 years**. A **balance calculation** (see following figure) is used to indicate whether the visitor interest has decreased, increased or remained the same.

Impact of the coronavirus pandemic within the next 12 months

> Now we are interested in knowing to which extent the coronavirus pandemic influences your interest in visiting the following tourist destinations within the next 12 months.
Please select the appropriate answer for each tourist destination.

“Due to the coronavirus pandemic, my interest in visiting the following tourist destinations within the next 12 months for a holiday trip (with at least one overnight stay) has been ...”

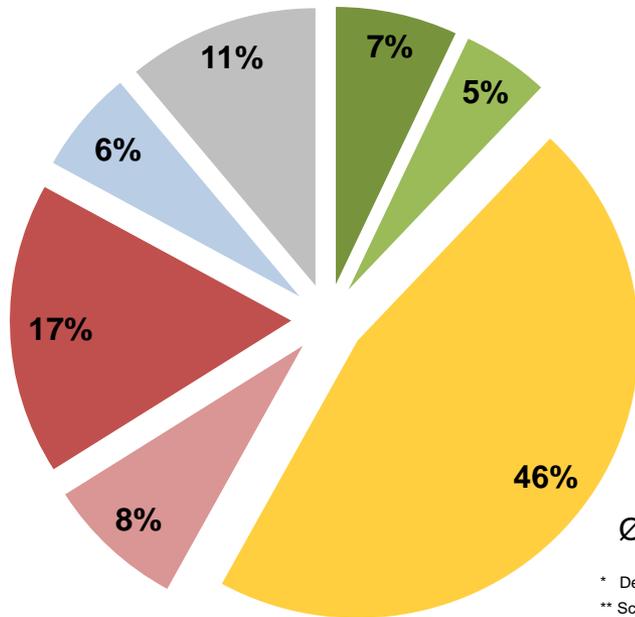
> Values (in % of respondents)

Destination XY

Source market: Germany

Base: All respondents

Number of respondents: 1,000



$\emptyset^{**} = 2.7$

* Deviations of 1% from the sum of the individual values are possible due to rounding.

** Scale from "5 = significantly increased" to "1 = significantly decreased"



- I don't know
- destination unknown

Brief explanation:

The **balance** (top-two-box - bottom-two-box) is the key indicator for the impact of the coronavirus pandemic on the interest to visit a tourist destination.

The balance also forms the **basis for the supplementary competitor analysis** within the framework of the individual reports.

Brief explanation:

Independently of the four-dimensional brand funnel analysis, the question listed above provides a basic orientation on the **impact of the coronavirus pandemic on the interest of the respective source market in visiting the tourist destinations** investigated for a holiday trip (with at least one overnight stay) – in each case in relation to the **next 12 months** and the **next 3 years**.

The additional module also includes a destination-specific **target group analysis** as well as a **competitor analysis** comprising all considered tourist destinations per source market, which have ordered the additional module.

5.1 Impact of the coronavirus pandemic – Results of univariate analyses

Impact of the coronavirus pandemic within the next 12 months

> Now we are interested in knowing to which extent the coronavirus pandemic influences your interest in visiting the following tourist destinations in Germany within the next 12 months. Please select the appropriate answer for each tourist destination.

“Due to the coronavirus pandemic, my interest in visiting the following tourist destinations in Germany within the next 12 months for a holiday trip (with at least one overnight stay) has been ...”

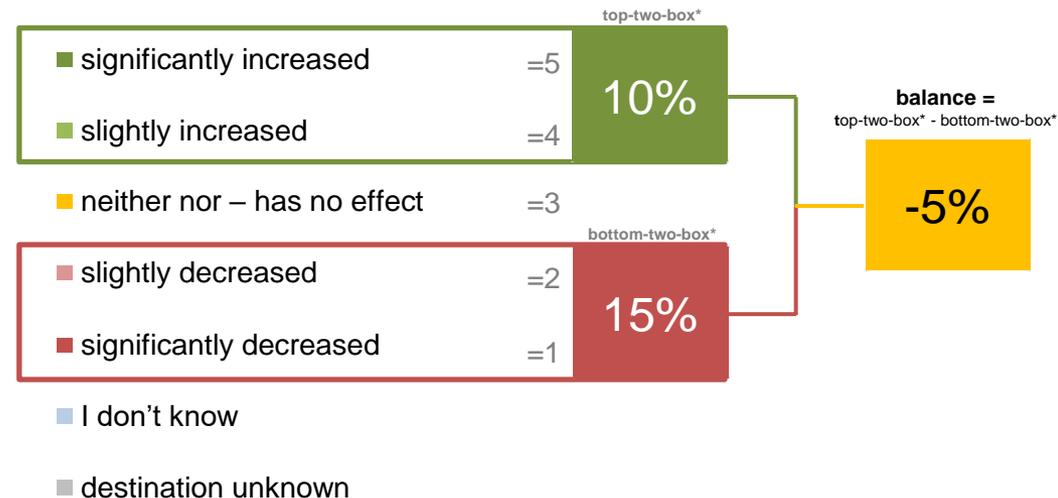
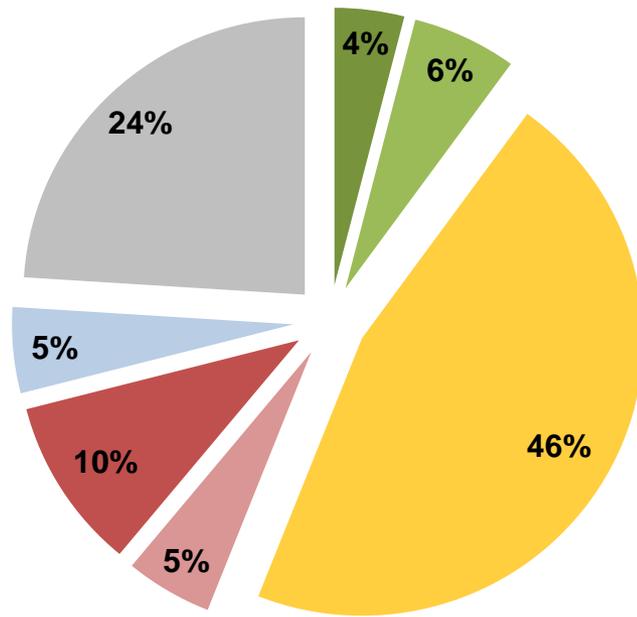
> Values (in % of respondents)

Destination XY

Source market: Germany

Base: All respondents

Number of respondents: 1,000



$\sigma^{**} = 2.8$

* Deviations of 1% from the sum of the individual values are possible due to rounding.

** Scale from "5 = significantly increased" to "1 = significantly decreased"

Source: inspektour (international) GmbH, 2021 (visualisation example with fictional values)

5.2 Impact of the coronavirus pandemic – Standard target group analysis

Impact of the coronavirus pandemic within the next 12 months

> Now we are interested in knowing to which extent the coronavirus pandemic influences your interest in visiting the following tourist destinations in Germany within the next 12 months. Please select the appropriate answer for each tourist destination.

“Due to the coronavirus pandemic, my interest in visiting the following tourist destinations in Germany within the next 12 months for a holiday trip (with at least one overnight stay) has been ...”

> Values (in % of respondents)

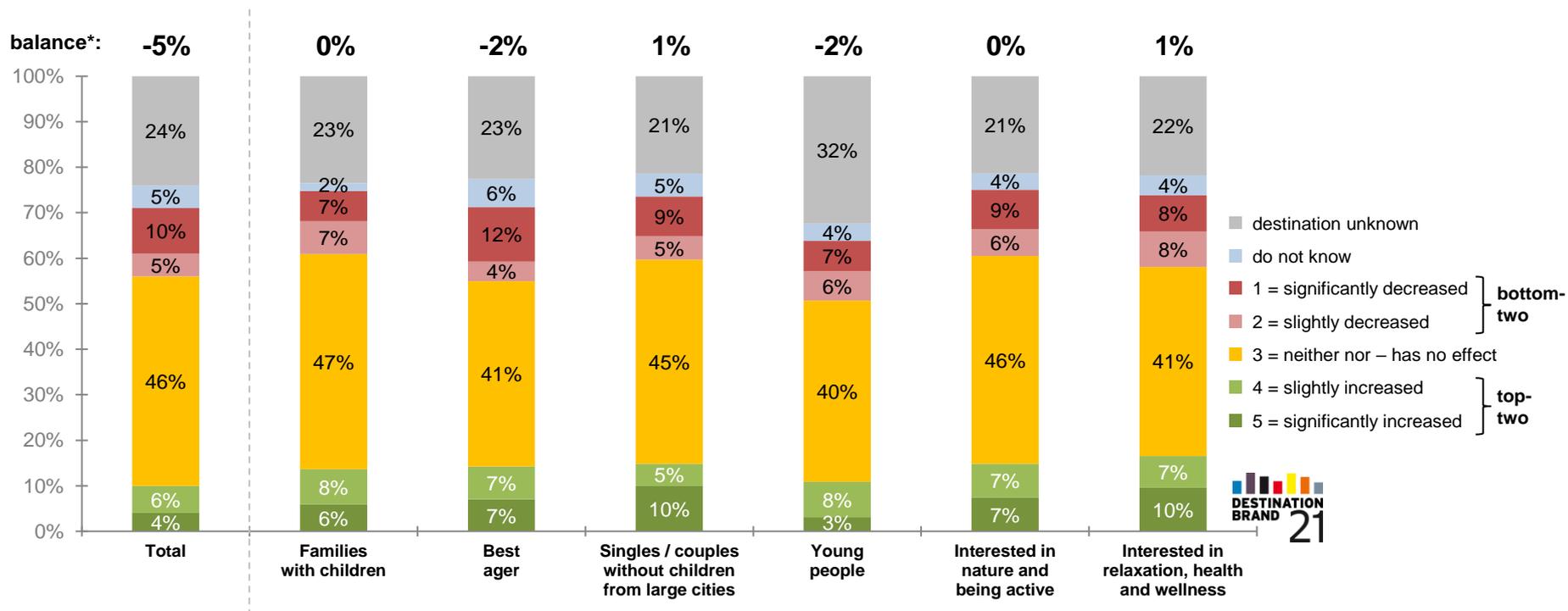
Destination XY

Source market: Germany

Segmentation: Target groups

Base: All respondents

Number of respondents: 1,000



Source: inspektour (international) GmbH, 2021 (visualisation example with fictional values)

* Balance = top-two – bottom-two (Deviations of 1% from the sum of the individual values are possible due to rounding.)

5.3 Impact of the coronavirus pandemic – Competitor analysis: All considered destinations

Brief explanation:

Within the framework of this investigation focus, the additional module contains **detailed rankings of all the destinations investigated** on the impact of the coronavirus pandemic on the interest in visiting within the next 12 months and 3 years (each on the base of “all respondents” and, in the case of international tourist destinations from the perspective of the respective source market, on the base of respondents with a “distinct intention to travel abroad”).

These rankings list the **names and positions of all the destinations examined, which have ordered the additional module**, while the underlying percentages are displayed exclusively for the destination that commissioned the individual report.

Impact of the coronavirus pandemic on interest to visit (next 3 years)				
Source market: Germany				
balance = top-two-box – bottom-two-box				
In % of respondents Base: All respondents				
Ranking in the category: All considered destinations (mean = -4%)				
1	Destination 1		24	Destination 24
2	Destination 2		25	Destination 25
3	Destination 3		26	Destination 26
4	Destination 4		27	Destination 27
5	Destination XY	Xx%	28	Destination 28
6	Destination 6		29	Destination 29
7	Destination 7		30	Destination 30
8	Destination 8		31	Destination 31
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20	Destination 20		43	Destination 43
21	Destination 21		44	Destination 44
22	Destination 22		45	Destination 45
23	Destination 23		...	

Source: inspektour (international) GmbH, 2021 (visualisation example with fictional values)

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