inspektour
TOURISM AND MARKET RESEARCH

Measurement of the theme competence of your tourist destination

General interest potential of more than 40 holiday activities

Competitive comparison with all tourist destinations surveyed per source market

DESTINATION BRAND 18

THE THEME COMPETENCE OF TOURIST DESTINATIONS

EXAMPLE: SOURCE MARKET **GERMANY**

Report for the tourist destination Destination XY

Note: This sample report is based on the study year Destination Brand 18 and serves to illustrate the basic structure and contents of an individual report for the theme study within the Destination Brand study series based on a fictional example (see "Destination XY"). The individual reports of the theme study Destination Brand 21 are subject to change.

Customer-oriented study of the theme competence of tourist destinations

total 4,000 respondents I population representative study | 45 individual destinations

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Outline

Outline

Outline

1. Overview of the study series Destination Brand

	Brand value	Theme competence	Profile / Image
Aim	− Customer-oriented evaluation of the **brand value** of tourist destinations	− Customer-oriented evaluation of the **theme competence** of tourist destinations (≙ associations of the **functional benefits** of the destination brands)	− Customer-oriented evaluation of the **profiles / images** of tourist destinations (≙ associations of the **emotional-symbolic benefits** of the destination brands)
Research focus	Four-dimensional brand funnel analysis: − Awareness (supported and unsupported) − Likeability − Willingness to visit for future short trips and longer holiday trips within the next 3 years (and DB20: within the next 12 months) − Visits in the past − Impact of the coronavirus pandemic on the interest to visit − Target group- and competitor analysis	− General (i.e., regardless of a specific destination) interest in holiday activities − Supported theme suitability per destination (for 5 general themes and 5 specific themes) − Theme suitability top of mind per destination − Target group- and competitor analysis	**Module 1 (M1):** − General relevance of destination attributes and characteristics for the destination selection (regardless of a specific destination) − Supported evaluation of characteristics per destination (for 8 general attributes and 5 specific attributes) − Target group- and competitor analysis **Module 2 (M2):** − Spontaneous associations per destination

Survey design

For all sub-studies
- **Online survey** in respective national language; quota sample (based on cross quota age/sex and regional origin)
- **Representative** of the respective population aged 14-74 years living in private households (basis for projection of absolute volumes)
- Comprehensive **competitive comparison possibilities** based on the relatively large destination pool
- **Time comparison possibilities** based on the consistent study design

Specific per sub-study

	DB09	DB12	DB15	DB18	DB20	DB10	DB13	DB16	DB18	DB11	DB14	DB17	DB19
Source markets	DE	DE	DE	DE | AT | CH | NL	DE | AT | CH | NL | CN | FR | IT | ES | UK | US	DE	DE	DE	DE | AT | CH | NL	DE	DE	DE	DE | AT | CH | NL | CN
Total number of respondents	8,900	15,000	17,000	12,000	31,000	10,500	16,000	17,000	12,000	10,000	11,000	17,000	8,000
Total number of destinations	141	160	172	76*	200***	141	160	172	76*	M1: 104 M2: 22	M1: 115 M2: 21	M1: 170 M2: 170	55**
Themes / characteristics	--	--	--	--	--	5 gen. + 25 spec.	5 gen. + 50 spec.	6 gen. + 57 spec.	5 gen. + 28 spec.	6 gen. + 50 spec.	6 gen. + 56 spec.	8 gen. + 59 spec.	solely spontaneous associations

* In the study DB18 some destinations were surveyed in two or more source markets; distribution: DE = 45 | AT = 22 | CH = 33 | NL = 33.
** In the study DB19 some destinations were surveyed in two or more source markets; distribution: DE = 45 | AT = 8 | CH = 12 | NL = 8 | CN = 10.
*** In the study DB20 some destinations were surveyed in two or more source markets; distribution: DE = 190 | AT = 10 | CH = 10 | NL = 10 | CN = 10 | FR = 20 | IT = 20 | ES = 12 | UK = 20 | US = 11.

Outline

As a unique feature,
each year the study series Destination Brand covers a **substantial destination pool**
which allows the conduction of a comprehensive competitor analysis for each destination examined.
In the upcoming study Destination Brand 21 about **150** (German & international)
tourist destinations are planned for the source market Germany.

In addition to **Germany, Austria, Switzerland, the Netherlands and China**,
the DB21 survey will also be conducted in
France, Italy, Spain, the United Kingdom and the USA.

2.1 Methods of the theme competence study Destination Brand 18

Aim	– Study for the customer-oriented **theme competence measurement** of destinations in the source markets Germany (DE), Austria (AT), Switzerland (CH) and the Netherlands (NL)
Key issues	– General (i.e., regardless of a specific destination) **interest in holiday activities** of the respective source market – **Theme suitability** per destination (supported and top of mind) – **Combination of touristic marketing themes and target groups** as potential market segments DESTINATION BRAND 18
Survey design	– **76 destinations** (several destinations were surveyed in more than one source market; distribution among source markets: DE = 45 | AT = 22 | CH = 33 | NL = 33) – **Total sample size:** 12,000; per destination: 1,000 (supported theme suitability) (distribution among source markets: DE = 4,000 | AT = 2,000 | CH = 3,000 | NL = 3,000) – **Online survey in the respective national language** (remark: CH = German & French); **quota sample** based on cross quota age/sex and regional origin – **Representative** for the respective population aged 14-74 years living in private households (DE = 61.94 m people; AT = 6.59 m people; CH = 6.02 m people; NL = 12.78 m people)
Survey period	– **November / December 2018**

2.1 Methods of the theme competence study Destination Brand 18
Three-dimensional theme competence analysis

SUPPLY

Customer-oriented evaluation of theme suitability Destination XY

Competitive situation Destination XY

DEMAND

General (i.e., regardless of a specific destination) interest potential per theme

COMPETITION

Competitor analysis Comparisons with selected destinations per theme
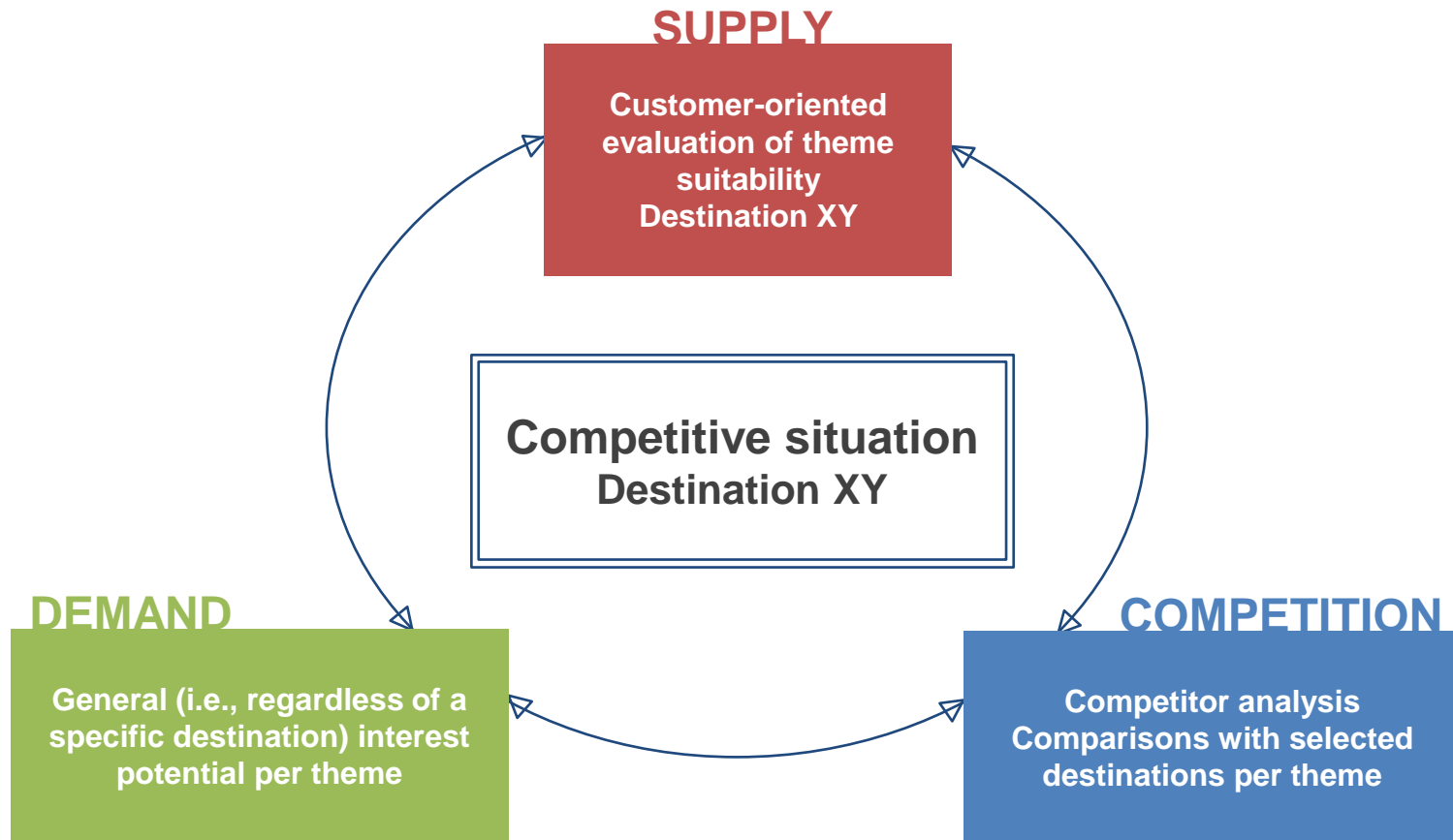
2.2 Overview of the considered holiday activities

General themes
(examined for all destinations)

1. Culinary
2. Culture
3. Nature
4. Sports
5. City break

Specific themes
(individual selection for **Destination XY** is highlighted)

6.	Amusement parks	20.	Luxury
7.	Castles	21.	Motorcycling
8.	Countryside	22.	Mountain biking
9.	Climbing fixed mountain routes	23.	Mountaineering
10.	**Cycling**	24.	Relaxation
11.	Events	25.	Shopping
12.	**Families**	26.	Study / educational offers
13.	Football	27.	**Sustainable holiday trip**
14.	Gardens / parks	28.	**Swimming / beach**
15.	Health	29.	Thalasso
16.	**Hiking**	30.	UNESCO world heritage sites
17.	Meeting indigenous peoples	31.	Water sports
18.	Industrial heritage	32.	Wellness
19.	Lively places	33.	Winter sports

► **Note 1:** For purposes of clarity, this overview shows the short versions of the holiday themes. A complete overview of the detailed descriptions of the holiday activities applied in the survey of the study Destination Brand 18 can be gained from the glossary (see chapter 9.2).
► **Note 2:** Last survey taken into consideration in November / December 2018

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

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2.3 Overview of the considered destinations

#	Destination	DE	AT	CH	NL
1.	Argentina	✓			
2.	Austria	✓			✓
3.	Baden-Württemberg		✓	✓	✓
4.	Bavaria		✓	✓	
5.	Berlin			✓	✓
6.	Black Forest			✓	✓
7.	Bratislava		✓		
8.	Budapest		✓		
9.	Burgenland	✓			
10.	Carinthia				
11.	Chiemsee - Chiemgau				
12.	Chile			✓	
13.	City of Otto	✓			
14.	Colombia	✓		✓	
15.	Croatia		✓		
16.	Dachstein	✓			
17.	Darmstadt	✓	✓		
18.	Dubrovnik		✓		
19.	Düsseldorf				✓
20.	Eifel	✓			
21.	Flanders	✓	✓	✓	✓
22.	France			✓	✓
23.	Germany		✓	✓	✓
24.	Greece	✓		✓	
25.	Hamburg				
26.	Hesse			✓	✓

#	Destination	DE	AT	CH	NL
27.	Holstein Switzerland	✓			
28.	Italy		✓	✓	
29.	Kassel	✓	✓	✓	✓
30.	Kingdom of Fife	✓			
31.	Ljubljana		✓		
32.	London			✓	✓
33.	Lower Austria	✓			
34.	Lower Saxony			✓	
35.	Lusatian Lake District	✓			
36.	Luxembourg	✓	✓	✓	
37.	Magdeburg	✓			
38.	Mecklenburg Lake District	✓			
39.	Mexico	✓			
40.	Munich		✓		
41.	New Zealand	✓			
42.	Norderney	✓			✓
43.	North Rhine-Westphalia	✓			
44.	Paris			✓	✓
45.	Peru	✓			
46.	Prague		✓		
47.	Rhineland-Palatinate	✓	✓	✓	✓
48.	Rügen Island	✓	✓		
49.	Ruhr Valley	✓			
50.	Salzburger Land	✓			
51.	Sauerland			✓	
52.	Saxony		✓	✓	

#	Destination	DE	AT	CH	NL
53.	Schladming	✓			
54.	Schladming-Dachstein	✓			
55.	Schleswig-Holstein			✓	✓
56.	South Africa	✓			
57.	South America			✓	
58.	South Tirol	✓		✓	✓
59.	Spain		✓	✓	✓
60.	SPO	✓			
61.	St. Peter-Ording	✓			
62.	Stuttgart				✓
63.	Styria	✓			
64.	Swabian Alb			✓	✓
65.	Taunus	✓			
66.	Thuringia	✓	✓	✓	✓
67.	Tirol	✓			
68.	Trentino	✓		✓	✓
69.	Uckermark	✓			
70.	Upper Austria	✓			
71.	Upper Lusatia	✓			
72.	Usedom Island		✓	✓	
73.	Vienna	✓		✓	
74.	Vorarlberg	✓			✓
75.	Wadden Island Ameland				✓
76.	Wadden Island Texel				✓

Note 1: The source markets are marked in green, if the respective destination was surveyed there in the course of the study Destination Brand 18.
Note 2: Last survey taken into consideration November / December 2018

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

Outline

The **unsupported theme suitability (top of mind)** provides information about which tourist destinations are considered **particularly suitable for the respective holiday activity.**

Tourist destination brands which rank among the top 10 **occupy a predominant position in the minds of the respondents.**

Within the scope of the Destination Brand 21 study, the unsupported theme suitability is surveyed uniformly across all source markets for **a total of 5 holiday themes**, which are selected in advance by inspektour (international) GmbH on the basis of their **current relevance.**

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3.1 Unsupported theme suitability (top of mind) – *Competitor analysis Destination XY*

*Please imagine that you intend to **go on a [here theme inserted] holiday.***

Which tourist destinations (countries, cities, regions etc.) <u>within Germany</u> do you consider particularly suitable for this purpose? (max. 3 responses)

■ *Destination XY*

Source market: Germany
Number of respondents: min.   387
Number of responses: min.   765
Base: All respondents (valid responses)

Unsupported theme competence of tourist destinations within Germany …		DESTINATION BRAND 18			
		% of respondents*	% of responses	number of responses	rank
… for a culinary journey	Destination XY	2.8%	1.3%	12	16.
… for a cultural journey / holiday	Destination XY	X.x%	X.x%	Xx	Xx.
… for a nature-based holiday	Destination XY	X.x%	X.x%	Xx	Xx.
… for an active sports holiday	Destination XY	X.x%	X.x%	Xx	Xx.
… for a city trip	Destination XY	X.x%	X.x%	Xx	Xx.

* Multiple answers possible.

Source: inspektour (international) GmbH / IMT of the FH Westküste, 2018 (visualisation example with fictional values)

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3.2 Unsupported theme suitability (top of mind) – *Competitor analysis Top 10 destinations*

*Please imagine that you intend to **go on a culinary journey.***

Which tourist destinations (countries, cities, regions etc.) <u>within Germany</u> do you consider particularly suitable for this purpose? (max. 3 responses)

■ *Culinary*

Source market: Germany
Number of respondents: 436
Number of responses: 952
Base: All respondents (valid responses)

	Unsupported theme suitability (top of mind) "Culinary journey" – Top 10 destinations	% of respondents*	% of responses	number of responses
1	Bavaria	31.0%	14.2%	135
2	Berlin	14.9%	6.8%	65
3	Hamburg	14.7%	6.7%	64
4	Munich	14.2%	6.5%	62
5	North Sea / North Sea Coast	12.8%	5.9%	56
6	Black Forest	10.1%	4.6%	44
7	Baltic Sea / Baltic Sea Coast	9.6%	4.4%	42
8	Thuringia	8.3%	3.8%	36
9	Moselle	7.6%	3.5%	33
10	Palatinate	5.7%	2.6%	25

The DB21 reports contain the top 10 rankings for a total of 5 holiday themes, each on the base of "all respondents", and depending on the number of cases: on the base of respondents being "interested in the theme" 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".

* Multiple answers possible.

► **Note:** Similar terms with identical destination reference (e.g., North Sea - North Sea Coast - North Sea Region) were assigned to each other and clustered.

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

Outline

Within the framework of the Destination Brand theme study, the analysis of the potential demand is based on the measurement of the **general interest (i.e., regardless of a specific destination)** of the respective represented population in various holiday themes.

In the course of the study Destination Brand 21, the **general interest potential** is surveyed uniformly across all source markets **for approx. 40-45 holiday activities.**

For a better interpretation of the results, you will also receive **time comparisons with all predecessor studies of the DB theme study**, in which the general interest potential of the respective holiday activity in the source market in question was already surveyed.

4.1 Demand: General interest potential – *All considered holiday activities*

Ranking of the considered holiday activities with regard to the general interest potential (Mean = 34%)						
Source market: Germany						
Base: All respondents | Number of respondents: 4,000						
Top-two-box on a scale from "5 = very interested" to "1 = not at all interested"						
		% of respondents	**projection***		**% of respondents**	**projection***
1	Relaxing and resting	75%	46.7 m	18	Spending holidays in the countryside (e.g., on the farm or vineyard)	31%	19.4 m
2	**Enjoying nature**	**68%**	**42.0 m**	**19**	**Cycling (not mountain biking)**	**28%**	**17.4 m**
3	**Swimming and being at the beach**	**62%**	**38.6 m**	**20**	**Using family offers**	**27%**	**16.9 m**
4	**Enjoying culinary / gastronomic specialities**	**60%**	**37.3 m**	**21**	**Being active and involved in sports**	**27%**	**16.6 m**
5	**Taking a city break**	**59%**	**36.8 m**	22	Using thalasso services (e.g., therapy with sea water, algae, sand)	25%	15.3 m
6	Visiting castles, palaces and cathedrals	52%	32.2 m	23	Using health services (self-paying, not a prescribed visit to a health spa)	23%	14.5 m
7	Visiting gardens / parks	49%	30.5 m	24	Using luxury offers	22%	13.8 m
8	**Visiting cultural institutions / using cultural services**	**45%**	**28.1 m**	25	Visiting industrial heritage sites (e.g., factories, (coal) mines, museums of industrial heritage)	21%	13.2 m
9	Using wellness services	43%	26.4 m	26	Practising water sports (not sailing)	20%	12.3 m
10	**Hiking**	**42%**	**26.1 m**	27	Using study / educational offers	18%	11.3 m
11	Visiting UNESCO world heritage sites	39%	24.3 m	28	Practising winter sports (e.g., cross-country skiing, downhill)	17%	10.8 m
12	Shopping	39%	24.1 m	29	Mountaineering (e.g., mountain and summit tours)	17%	10.5 m
13	Experiencing lively places (e.g., trendy shopping districts, festivals, alternative cultural circles, night life)	35%	21.7 m	30	Attending football matches and visiting stadiums as well as other attractions/events related to football	17%	10.3 m
14	Meeting the indigenous (native) peoples	34%	20.8 m	31	Mountain biking	14%	9.0 m
15	**Undertaking a sustainable holiday trip (nature preserving / environmentally friendly, economically and socially fair)**	**33%**	**20.3 m**	32	Climbing fixed mountain routes (Via ferrata)	12%	7.2 m
16	Visiting amusement / theme parks	32%	20.1 m	33	Motorcycling	11%	7.0 m
17	Attending events	31%	19.4 m				

* Projection of the absolute volume of the prospective interest potential (number of people).

► **Note:** Last survey taken into consideration in November / December 2018

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

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4.1 Demand: General interest potential – *Destination-specific holiday activities*

General interest potential of the destination-specific holiday activities

> The following question is about your general interest in touristic holiday activities, i.e., regardless of a specific tourist destination. How interested are you in pursuing the following touristic holiday activities in your holiday with at least one overnight stay?

> Top-two-box on a scale from "5 = very interested" to "1 = not at all interested" (in % of respondents)

■ *Holiday activities of Destination XY in comparison*

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

■ Value "5"   ■ Value "4"

Projection*

Activity	Top-two-box	Projection*
Enjoying nature	68%	42.0 m
Enjoying culinary / gastronomic specialities	60%	37.3 m
Taking a city break	59%	36.8 m
Visiting cultural institutions / using cultural services	45%	28.1 m
Being active and involved in sports	27%	16.6 m
Swimming and being at the beach	62%	38.6 m
Hiking	42%	26.1 m
Undertaking a sustainable holiday trip	33%	20.3 m
Cycling (not mountain biking)	28%	17.4 m
Using family offers	27%	16.9 m

0% 10% 20% 30% 40% 50% 60% 70% 80%

* Projection of the absolute volume of the prospective interest potential (number of people).

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

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Outline

In this second central focus of the study Destination Brand 21,
it is surveyed to which extend the represented population considers
the respective tourist destination to be suitable for the holiday activities investigated
(regardless of one's own interest in the activities).

Each destination is assessed on its **suitability for a total of ten holiday activities**,
consisting of the **five general themes** "Culinary", "Culture", "Nature", "Sports" and
"City break" (are surveyed uniformly for all tourist destinations) as well as
five additional specific themes (can be selected from a predefined pool of themes).

Supplementary time comparisons:
If your destination was already surveyed in the previous studies of the DB theme study in the relevant source market, you will receive a supplementary **time comparison of the supported theme suitability of your destination** on the base of "all respondents" to the respective previous study years for a better interpretation of the results.

The data preparation of the time comparison is **independent** of whether you had booked an individual report for your destination in the respective predecessor study.

You can find out the **survey status** of your destination in the previous study years from us.

4.2 Supply: Supported theme suitability

Supported theme suitability of the respective holiday activities

> *In your opinion, to what extent is the following tourist destination <u>in Germany</u> suitable for the holiday activities below (regardless of your own interest in the holiday activities)?*

> *Top-two-box on a scale from "5 = very suitable" to "1 = not at all suitable" (in % of respondents)*

■ *Destination XY*

Source market: Germany
Base: All respondents
Number of respondents: 1,000

	Projection*
■ Value "5" ■ Value "4"	
Enjoying nature — 67%	*41.6 m*
Being active and involved in sports — 55%	*34.2 m*
Enjoying culinary / gastronomic specialities — 46%	*28.3 m*
Visiting cultural institutions / using cultural services — 30%	*18.8 m*
Taking a city break — 22%	*13.8 m*
Swimming and being at the beach — 64%	*39.9 m*
Cycling (not mountain biking) — 59%	*36.7 m*
Hiking — 57%	*35.3 m*
Using family offers — 49%	*30.4 m*
Undertaking a sustainable holiday trip — 42%	*26.2 m*

0% 10% 20% 30% 40% 50% 60% 70% 80% 90%

* Projection of the absolute volume of the attributed suitability of each theme (number of people).

Source: inspektour (international) GmbH / IMT of the FH Westküste, 2018 (visualisation example with fictional values)

4.2 Supply: Supported theme suitability – *General themes by subgroups*

Supported theme suitability of the general themes

> In your opinion, to what extent is the following tourist destination <u>in Germany</u> suitable for the holiday activities below (regardless of your own interest in the holiday activities)?

> Top-two-box on a scale from "5 = very suitable" to "1 = not at all suitable" (in % of respondents)

■ *Destination XY*

Source market: Germany
Base: All respondents
Number of all respondents: 1,000
Number base by subgroups: varying

Projection*

■ All respondents   ■ Interested in the theme   ■ Visitors in the past

Theme				All respondents	Interested in the theme	Visitors in the past
Enjoying nature	67%	78%	86%	41.6 m	32.6 m	17.9 m
Being active and involved in sports	55%	68%	76%	34.2 m	11.5 m	15.8 m
Enjoying culinary / gastronomic specialities	46%	56%	65%	28.3 m	20.9 m	13.6 m
Visiting cultural institutions / using cultural services	30%	43%	48%	18.8 m	11.7 m	10.0 m
Taking a city break	22%	27%	36%	13.8 m	10.1 m	7.6 m

0% 10% 20% 30% 40% 50% 60% 70% 80% 90%

* Projection of the absolute volume of the attributed suitability of each theme (number of people).

Source: inspektour (international) GmbH / IMT of the FH Westküste, 2018 (visualisation example with fictional values)

Outline

Besides a comparison to all considered destinations,
the individual reports **in the source market Germany** will also include
a competitor analysis in one of the following **additional categories:**
"regions in general", "small cities", "medium-sized cities" and "large cities"
If your tourist destination additionally falls into one of the categories "coastal destinations" and
"(low / high) mountain ranges", the competitor analysis will be carried out for these as well.
Depending on the concrete destination pool in the source market Germany,
further categories could be offered if appropriate.

4.3 Supported theme suitability – *Competitor analysis: All considered destinations*
Source market: Germany

DESTINATION BRAND 18	Source market: Germany		Category: All considered destinations							
Destination XY **(N = 1,000)**	**Number of destinations in category**	**Base: All respondents**				**Base: Respondents with interest in the theme**			
		own value		**mean**	**rank**	**own value**		**mean**	**rank**
		in %	projection*			in %	projection*		
Enjoying culinary / gastronomic specialities	45	46%	28.3 m	34%	Xx.	56%	20.9 m	42%	Xx.
Visiting cultural institutions / using cultural services		30%	18.8 m	30%	Xx.	43%	11.7 m	41%	Xx.
Enjoying nature		67%	41.6 m	40%	Xx.	78%	32.6 m	47%	Xx.
Being active and involved in sports		55%	34.2 m	32%	Xx.	68%	11.5 m	43%	Xx.
Taking a city break		22%	13.8 m	29%	Xx.	27%	10.1 m	35%	Xx.
Swimming and being at the beach	10	64%	39.9 m	41%	Xx.	72%	27.7 m	46%	Xx.
Using family offers	21	49%	30.4 m	27%	Xx.	57%	9.6 m	34%	Xx.
Undertaking a sustainable holiday trip	13	42%	26.2 m	25%	Xx.	59%	11.5 m	39%	Xx.
Cycling (not mountain biking)	23	59%	36.7 m	34%	Xx.	74%	12.6 m	46%	Xx.
Hiking	31	57%	35.3 m	42%	Xx.	67%	17.4 m	54%	Xx.

* Projection of the absolute volume of the attributed suitability per theme (number of people).   ► **Note:** Last survey taken into consideration in November / December 2018

Source: inspektour (international) GmbH / IMT of the FH Westküste, 2018 (visualisation example with fictional values)

All the achieved competition placements of the tourist destination are summarised in this table.

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Outline

The three-dimensional theme competence analysis is visually summarised using a **"quadrant analysis":**

– **1. Dimension "Demand":** The greater the general (i.e., regardless of a specific destination) interest in the respective holiday activity, the further to the right the theme is placed on the axis.
– **2. Dimension "Supply":** The larger the "theme circle", the higher the approval of suitability by the respondents for the theme.
– **3. Dimension "Competition":** The better Destination XY performs in the competitive comparison per holiday activity, the higher the respective theme is placed in the quadrant.

4.4 Quadrant analysis

Quadrant analysis Destination XY

> *Category for relative ranking according to competitor analysis:*
>   *All considered destinations (up to 45 tourist destinations per theme)*

■ *Destination XY*

Source market: Germany
Base: All respondents
Number of respondents: 1,000

Relative ranking according to competitor analysis (vertical axis: high / average / low)

General interest potential per theme
(top-two-Box)

Legend:
● General themes
● Specific themes

Themes plotted: Families, Cycling, Sports, Sustainable holiday trip, Hiking, Nature, Swimming / beach, Culinary, Culture, City break

Notes:
► Size of circles = Supported theme competence
  of the tourist destination Destination XY
► Last survey taken into consideration in November / December 2018

Source: inspektour (international) GmbH / IMT of the FH Westküste, 2018 (visualisation example with fictional values)

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4 OVERVIEW OF KEY RESULTS: THREE-DIMENSIONAL THEME COMPETENCE ANALYSIS

5 DEMAND: GENERAL INTEREST POTENTIAL IN DETAIL

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5. Demand: General interest potential – *Holiday activities in detail*

Interest potential of the holiday activity:

"Enjoying culinary / gastronomic specialities"

> The following question is about your <u>general</u> interest in touristic holiday activities, i.e., <u>regardless</u> of a specific tourist destination. How interested are you in pursuing the following touristic holiday activities in your holiday with at least one overnight stay?

> Share values (in % of respondents)

■ *Culinary*

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

- ■ 5 = "very interested"
- ■ 4 =

top-two-box*
60%

- ■ 3 =

- ■ 2 =
- ■ 1 = "not interested at all"

bottom-two-box*
15%

Ø** = 3.7

Within the framework of the DB21 reports, this evaluation is carried out similarly for all 10 holiday activities of the respective destination.

*   Possible deviations of 1% from the sum of the individual values are due to rounding.
** Scale from "5 = very interested" to "1 = not interested at all"

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

Outline

6.1 Supply: Supported theme suitability – *Results of univariate analysis*

Supported theme suitability for the holiday activity:

"Enjoying culinary / gastronomic specialities"

> In your opinion, to what extent is the following tourist destination in Germany suitable for the holiday activities below (regardless of your own interest in the holiday activities)?

> Values (in % of respondents)

■ *Destination XY*

Source market: Germany
Base: All respondents
Number of respondents: 1,000

- ■ 5 = "very suitable"
- ■ 4 =

top-two-box*
46%

- ■ 3 =

- ■ 2 =
- ■ 1 = "not at all suitable"

bottom-two-box*
7%

- ■ do not know

Pie chart values: 22%, 24%, 21%, 5%, 2%, 27%

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Ø** = 3.8
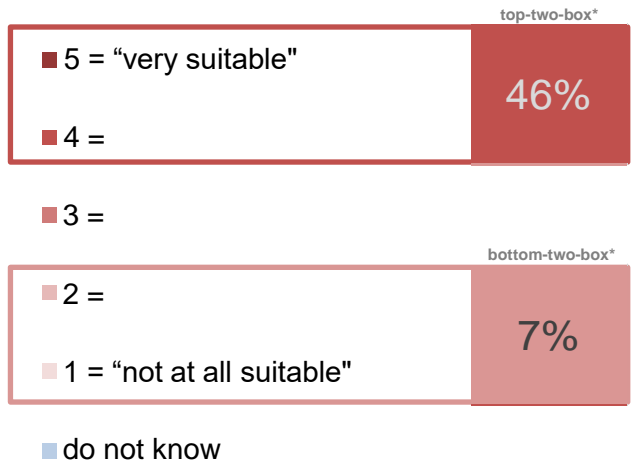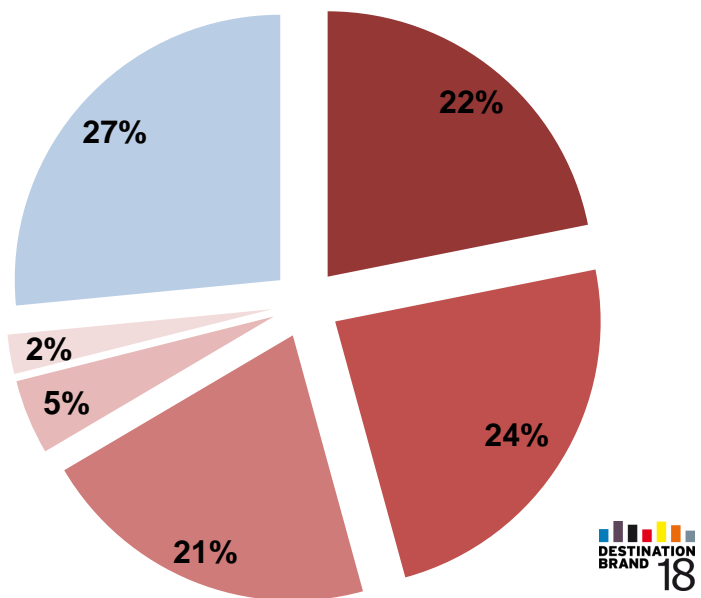
Within the framework of the DB21 reports, this evaluation is carried out similarly for all 10 holiday activities of the respective destination.

* Deviations of 1% from the sum of the individual values are possible due to rounding.
** Scale from "5 = very suitable" to "1 = not at all suitable"

Source: inspektour (international) GmbH / IMT of the FH Westküste, 2018 (visualisation example with fictional values)

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6 **SUPPLY: SUPPORTED THEME SUITABILITY IN DETAIL**

   6.1 Results of univariate analyses

   6.2 Sociodemographic differentiation

   6.3 Standard target group analysis

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In addition to the target group analysis, the individual reports for Destination Brand 21
include further bivariate evaluations of your tourist destination,
in which the supported theme suitability of your tourist destination
is differentiated **according to the following 8 socio-demographic criteria:**

Sex, age groups, formal education, household size, number of children under 14 years
in the household, net household income, town size and regional origin.
These evaluations provide a comprehensive basis
for identifying further attractive market potentials.

6.2 Supply: Supported theme suitability – *Sociodemographic differentiation*

Supported theme suitability of the general themes

> *In your opinion, to what extent is the following tourist destination in Germany suitable for the holiday activities below (regardless of your own interest in the holiday activities)?*

> *Top-two-box on a scale from "5 = very suitable" to "1 = not at all suitable" (in % of respondents)*

■ *Destination XY*

Source market: Germany
Sociodemography: Age group
Base: All respondents
Number of respondents: 1,000

General themes	total	Age group						Significance* (Kruskal-Wallis-test)
		14-24 y.	25-34 y.	35-44 y.	45-54 y.	55-64 y.	65-74 y.	
Enjoying culinary / gastronomic specialities	46%	36%	28%	39%	55%	54%	61%	sig.
Visiting cultural institutions / using cultural services	30%	20%	23%	23%	37%	35%	43%	sig.
Enjoying nature	67%	57%	55%	65%	72%	75%	77%	sig.
Being active and involved in sports	55%	44%	43%	55%	59%	65%	65%	sig.
Taking a city break	22%	-	-	-	-	-	-	n.s.

Within the framework of the DB21 reports, this evaluation is carried out similarly for all 8 socio-demographic criteria of the respective destination (both for the general themes and the specific themes).

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* Level of significance min. 0.05 (abbreviations: sig. = significant / n.s. = not significant, for further information see glossary).

Source: inspektour (international) GmbH / IMT of the FH Westküste, 2018 (visualisation example with fictional values)

Outline

The number of respondents for all considered destinations with regard to the supported theme suitability is at least 1,000. This comprehensive sample size generally permits the execution of **more detailed and statistically secured analyses.**

In the course of the **standard target group analysis** of the individual reports the evaluation of the theme suitability of your tourist destination is differentiated by **up to 6 individually selected target groups.**

The target groups can be defined on the basis of sociodemographic criteria, the general (i.e., regardless of a specific destination) interest in various holiday activities, the intention of the respondents to travel abroad / domestically as well as a combination of these aspects.

Concerning the **source market Germany**, additional comprehensive options of the target group analysis can be ordered as an add-on comprising the following renowned target group segmentations:

- the **"Sinus Milieus® Germany" and the "Sinus-Meta-Milieus®"**, which provide a realistic depiction of the socio-cultural diversity in societies by accurately describing people's attitudes and orientations, values, lifestyles and life goals as well as social backgrounds and positions

- the **"BeST types of holiday makers"**, which are based on the beliefs and benefit expectations of the German population and thus serve to gain a better understanding of the demands on a holiday and the customer-oriented interpretation of supply-related holiday topics (developed by the German Institute for Tourism Research (DITF) of the FH Westküste in the year 2020)

6.3 Supply: Supported theme suitability – *Standard target group analysis*
Examples for possible target group definitions

"Families with children"

- At least 1 child younger than 14 years living in the household

"Best Ager"

- Age of respondents: 55 to 74 years and
- No children younger than 14 years living in the household

"Singles and couples without children from large cities"

- Household size: 1- and 2-person households and
- No children younger than 14 years living in the household and
- Town size: min. 100,000 inhabitants

"Young people"

- Age of the respondents: 18 to 34 years and
- No children younger than 14 years living in the household and
- Net household income dependent on the household size:
  - 1-person household: 1,000 euros and above or
  - 2-person household: 2,000 euros and above or
  - 3 and more persons in household: 3,000 euros and above

6.3 Supply: Supported theme suitability – *Standard target group analysis*
Examples for possible target group definitions

"Interested in nature and being active"

- General (i.e., regardless of a specific destination) interest in the holiday activity "Enjoying nature" <u>and</u>
  (top-two-box on a scale from "5 very interested" to "1 = not at all interested")
- General (i.e., regardless of a specific destination) interest in <u>at least 1</u> of the following two holiday activities:
  - "Cycling (not mountain biking)" <u>and</u>
  - "Hiking"
  (top-two-box on a scale from "5 very interested" to "1 = not at all interested")

"Interested in relaxation, health and wellness"

- General (i.e., regardless of a specific destination) interest in the holiday activity "Relaxing and resting" <u>and</u>
  (top-two-box on a scale from "5 very interested" to "1 = not at all interested")
- General (i.e., regardless of a specific destination) interest in <u>at least 1</u> of the following two holiday activities*:
  - "Using health services (self-paying, not a prescribed visit to a health spa)" <u>and</u>
  - "Using wellness services"
  (top-two-box on a scale from "5 very interested" to "1 = not at all interested")

6.3 Supply: Supported theme suitability – *Standard target group analysis*
*Overview test of significance**

Examined themes Destination XY (N = 1,000)	Families with children	Best ager	Singles and couples without children from large cities	Young people	Interested in nature and being active	Interested in relaxation, health and wellness
Enjoying culinary / gastronomic specialities	not significant	significant	not significant	significant	significant	significant
Visiting cultural institutions / using cultural services	not significant	not significant	not significant	not significant	not significant	significant
Enjoying nature	not significant	significant	not significant	significant	significant	significant
Being active and involved in sports	not significant	significant	not significant	significant	significant	significant
Taking a city break	significant	not significant	significant	not significant	significant	significant
Swimming and being at the beach	significant	significant	not significant	significant	significant	not significant
Using family offers	not significant	not significant	not significant	not significant	not significant	significant
Undertaking a sustainable holiday trip	not significant	significant	not significant	not significant	significant	significant
Cycling (not mountain biking)	significant	significant	significant	not significant	not significant	significant
Hiking	not significant	significant	not significant	significant	significant	significant

* Applied test method: Kruskal-Wallis-Test; level of significance min. 0.05 (for further information see glossary).

Source: inspektour (international) GmbH / IMT of the FH Westküste, 2018 (visualisation example with fictional values)

6.3 Supply: Supported theme suitability – *Standard target group analysis*

Supported theme suitability for the holiday activity:

"Enjoying culinary / gastronomic specialities"

> In your opinion, to what extent is the following tourist destination in Germany suitable for the holiday activities below (regardless of your own interest in the holiday activities)?

> Top-two-box on a scale from "5 = very suitable" to "1 = not at all suitable" (in % of respondents)

■ *Destination XY*

Source market: Germany
Segmentation: Exemplary Target groups
Base: All respondents
Number of respondents: 1,000

Legend:
■ Value "4"
■ Value "5"

Category	Value
Total	46%
Families with children	48%
Best ager	58%
Singles / couples without children from large cities	47%
Young people	32%
Interested in nature and being active	64%
Interested in relaxation, health and wellness	58%

Within the framework of the DB21 reports, this evaluation is carried out similarly for all 10 holiday activities of the respective destination.

Source: inspektour (international) GmbH / IMT of the FH Westküste, 2018 (visualisation example with fictional values)

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7. Supported theme suitability – *Competitor analysis: All considered destinations*

Brief explanation:

In addition to the brief overview of the competitor analysis shown in chapter 4.3, the individual reports of the study Destination Brand 21 will also contain detailed rankings covering all considered destinations.

The individual reports of the study Destination Brand 21 will contain the rankings for all 10 holiday activities for which the supported theme suitability was surveyed for your tourist destination (each on the base of "all respondents", the respondents being "interested in the theme" 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**, while the underlying percentages are displayed exclusively for the destination that commissioned the individual report.

"Enjoying culinary / gastronomic specialities"					
Source market: Germany					
Top-two-box on a scale from "5 = very suitable" to "1 = not at all suitable" (in % of respondents)					
Base: All respondents					
Ranking in category: All considered destinations (*mean = 34%*)					
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				

► **Note:** Last survey taken into consideration in November / December 2018

Source: inspektour (international) GmbH / IMT of the FH Westküste, 2018 (visualisation example with fictional values)

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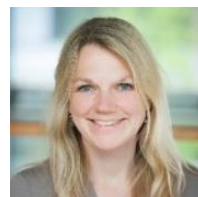
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9.1 Reading examples

9.2 Glossary

9.3 Margin of error

9.4 List of literature regarding the overview of the study series Destination Brand

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3.1 Unsupported theme competence (top of mind) – *Competitor analysis destination xy*

Please imagine that you intend to **go on a [here theme inserted] holiday.**

Which foreign tourist destinations (countries, cities, regions etc.) do you consider particularly suitable for this purpose? (max. 3 responses)

■ *Destination xy*

Source market: Germany
Number of respondents: min. 418
Number of responses: min. 840
Base: All respondents (valid responses)

Unsupported theme competence as a foreign tourist destination …		DESTINATION BRAND 18			
		% of respondents*	% of responses	number of responses	rank
… for a culinary journey	Destination xy	1.8%	0.8%	10	21.
… for a cultural journey / holiday	Destination xy	10.7%	4.8%	58	3.
… for a nature-based holiday	Destination xy	0.7%	0.3%	4	42.
… for an active sports holiday	Destination xy	1.9%	1.0%	8	20.
… for a city break	Destination xy	15.0%	6.3%	92	4.

* Multiple answers possible.

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

1

The **unsupported theme competence** of foreign tourist destinations is surveyed for the five general themes *"Culinary", "Culture", "Nature", "Sports" and "City break".*

2

The *percentages* are based on the total number of respondents as well as the total number of responses. Due to the possibility of multiple answers, the number of responses is greater than the number of respondents.

3

The destination's *competitive position* is demonstrated in the column 'rank'. In this example, the ranking takes into account *all considered foreign destinations* that were mentioned in the unsupported question – regard-less of whether the supported theme suitability of the destination was tested or not. The ranking is based on the number of responses.

<u>Central question:</u> How often considers the represented population destination xy spontaneously to be a *particularly suitable foreign tourist destination* for the respective type of holiday? – Reading example: *"to go on a cultural journey / holiday"*

► In the unsupported question regarding particularly suitable foreign tourist destinations to go on a cultural journey / holiday, a total of 58 responses are attributed to destination xy. This corresponds to 10.7% of the 540 respondents respectively 4.8% of the 1,207 responses.

► Based on the number of responses given, destination xy achieves rank 3 among all mentioned foreign tourist destinations to go on a cultural journey / holiday.

9.1 Reading examples

4.1 Demand: General interest potential – *Destination-specific holiday activities*

General interest potential of the destination-specific holiday activities

> The following question is about your <u>general</u> interest in touristic holiday activities, i.e., <u>regardless</u> of a specific tourist destination. How interested are you in pursuing the following touristic holiday activities in your holiday with at least one overnight stay?

> Top-two-box on a scale from "5 = very interested" to "1 = not at all interested" (in % of respondents) **[1]**

■ *Holiday activities of destination xy in comparison*

Source market: Germany
Base: All respondents
Number of respondents: 4,000 **[2]**

■ Value "5" ■ Value "4"   **[3]** Projection*

Activity	%	Projection*
Enjoying nature	68%	42.0 m
Enjoying culinary / gastronomic specialities	60%	37.3 m
Taking a city break	59%	36.8 m
Visiting cultural institutions / using cultural services	45%	28.1 m
Being active and involved in sports	27%	16.6 m

0% 10% 20% 30% 40% 50% 60% 70% 80%

[3] * Projection of the absolute volume of the prospective interest potential (number of people).

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

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[1]
Values are expressed as **top-two-box values**, i.e., the percentage refers to all respondents that answered with "very interested" or value "4" for the respective theme.

[2]
All respondents from the respective source market are considered in this question concerning the general interest (i.e., regardless of a specific tourist destination) in several holiday activities. In this example representing the source market Germany, the number of all respondents equals to 4,000.

[3]
The **projection** refers to the population represented in the study (14-74 years), which totals the following volume per source market: DE = 61.94 m people; AT = 6.59 m people; CH = 6.02 m people; NL = 12.78 m people.
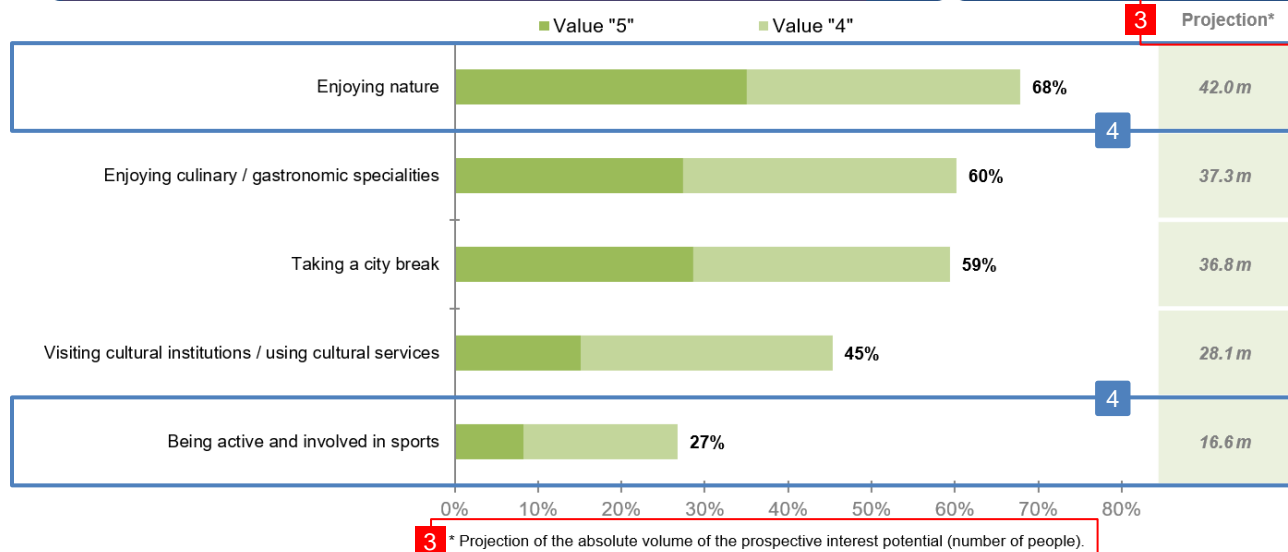
<u>Central question</u>: How high is the **general interest potential** (i.e., regardless of a specific tourist destination) for the selected holiday activities (here the general themes) in the source market Germany? – Reading example: **"Enjoying nature" and "Being active and involved in sports"**

[4]
► 68% of the represented German population are generally interested in the holiday activity "Enjoying nature".

► This corresponds to 42.0 million people in the age of 14-74 years (living in private households, German-speaking).

► In comparison, the general interest potential of the holiday activity "Being active and involved in sports" is much lower. 27% of all respondents are interested in this holiday activity.

9.1 Reading examples

4.2 Supply: Supported theme suitability

Supported theme suitability of the respective holiday activities

> *In your opinion, to what extent is the following foreign tourist destination suitable for the holiday activities below (regardless of your own interest in the holiday activities)?*

> *Top-two-box on a scale from "5 = very suitable" to "1 = not at all suitable" (in % of respondents)* **1**

■ **destination xy**
Source market: Germany
Base: All respondents **2**
Number of respondents: 1,000

3 Projection*

Activity	■ Value "5" ■ Value "4"	Projection*
Visiting cultural institutions / using cultural services	58%	36.2 m
Taking a city break	48%	29.9 m
Enjoying culinary / gastronomic specialities	42%	25.9 m
Enjoying nature	26%	16.2 m
Being active and involved in sports	23%	13.9 m
Shopping	51%	31.8 m
Visit to events	47%	28.8 m
Cycling (not mountain biking)	32%	19.5 m
Using luxury offers	21%	13.1 m
Undertaking a sustainable holiday trip	19%	11.7 m

0% 10% 20% 30% 40% 50% 60% 70% 80% 90%

4

3 * Projection of the absolute volume of the attributed suitability of each theme (number of people).

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

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1
Values are expressed as **top-two-box values**, i.e., the percentage refers to all respondents that answered the question with "5 = very suitable" or the value "4".

2
In this example, **all respondents** are considered for the analysis of the supported theme suitability. In total, 12,000 people were surveyed online in the study Destination Brand 18. Various representative sub-samples were used to achieve a sample size of 1,000 per destination.

3
The **projection** refers to the represented population of the study (14-74 year-olds), which amounts to the following number of people per source market: DE = 61.94 m people; AT = 6.59 m people; CH = 6.02 m people; NL = 12.78 m people.

Central question: What is the **theme suitability** of destination xy for the **considered theme portfolio** consisting of five pre-defined general themes and five additionally selected specific themes? – Reading example: **"Visiting cultural institutions / using cultural services"**

4
► 58% of the represented German population consider destination xy as suitable for "visiting cultural institutions / using cultural services".

► This corresponds to a total of 36.2 m people of the represented German population (living in private households, German-speaking).

9.1 Reading examples

4.2 Supply: Supported theme suitability – *General themes by subgroups*

Supported theme suitability of the general themes

> In your opinion, to what extent is the following <u>foreign</u> tourist destination suitable for the holiday activities below (regardless of your own interest in the holiday activities)?
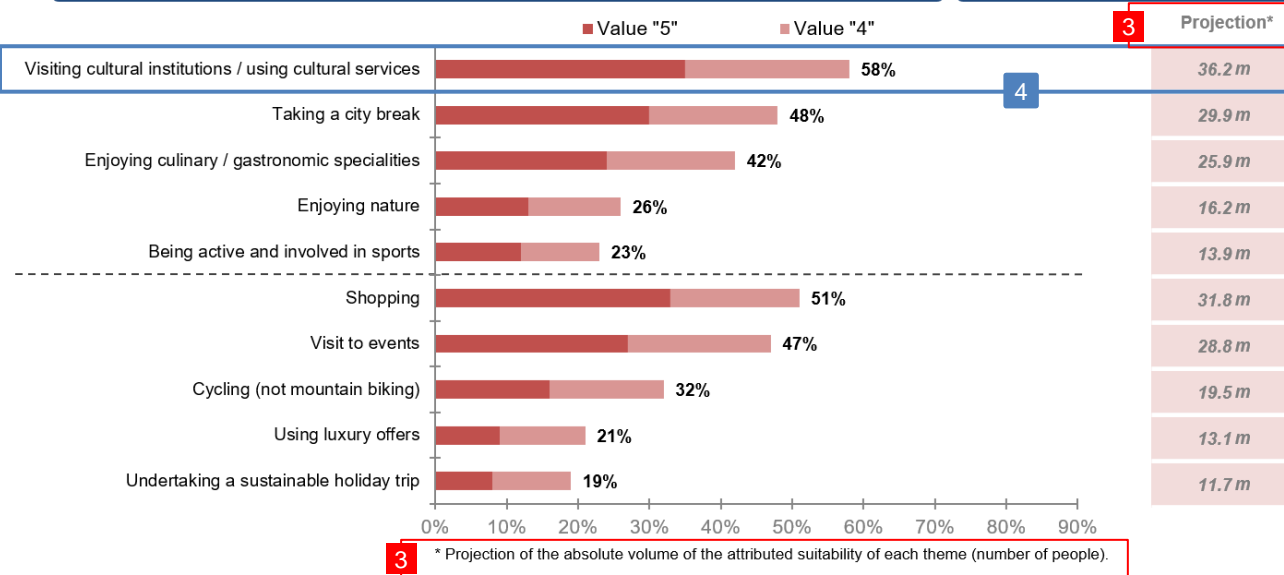
> Top-two-box on a scale from "5 = very suitable" to "1 = not at all suitable" (in % of respondents) [1]
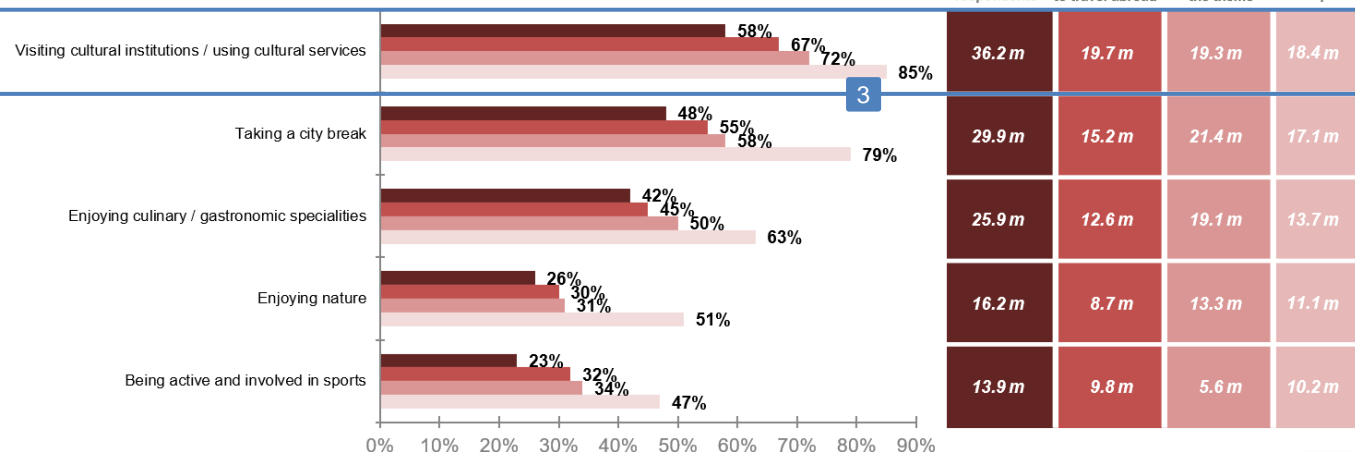
■ *destination xy*

Source market: Germany
Base: All respondents [2]
Number of all respondents: 1,000
Number base by subgroups: varying

■ All respondents ■ Distinct intention to travel abroad ■ Interested in the theme ■ Visitors in the past

Projection*

		All respondents	Distinct intention to travel abroad	Interested in the theme	Visitors in the past
Visiting cultural institutions / using cultural services	58% / 67% / 72% / 85% [3]	36.2 m	19.7 m	19.3 m	18.4 m
Taking a city break	48% / 55% / 58% / 79%	29.9 m	15.2 m	21.4 m	17.1 m
Enjoying culinary / gastronomic specialities	42% / 45% / 50% / 63%	25.9 m	12.6 m	19.1 m	13.7 m
Enjoying nature	26% / 30% / 31% / 51%	16.2 m	8.7 m	13.3 m	11.1 m
Being active and involved in sports	23% / 32% / 34% / 47%	13.9 m	9.8 m	5.6 m	10.2 m

0% 10% 20% 30% 40% 50% 60% 70% 80% 90%

* Projection of the absolute volume of the attributed suitability of each theme (number of people).

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

[1]
Values are expressed as **top-two-box values**, i.e., the percentage refers to all respondents that answered the question with "5 = very suitable" or the value "4".

[1]
The **supported theme suitability** is calculated based on the subgroups **"distinct intention to travel abroad"** (respondents who definitely intend to spend a short trip and / or a longer holiday trip abroad within the next 3 years), **"interested in the theme"** (respondents who are generally interested (i.e., regardless of a specific tourist destination) in the respective holiday activity) as well as **"visitors in the past"** (respondents who have already holidayed in the tourist destination with at least one overnight stay).

<u>Central question</u>: What is the **theme suitability** of destination xy for the **considered theme portfolio** (here the five pre-defined general themes) among the **different subgroups**? – Reading example: **"Visiting cultural institutions / using cultural services"**

► 58% of the represented German population consider destination xy as suitable for "visiting cultural institutions / using cultural services" (s. the dark red bar at the top).

► In comparison to the overall represented population, the subgroups "distinct intention to travel abroad" (67%) and "interested in the theme" (72%) attribute a higher theme suitability to destination xy (s. the two red bars in the middle). [4]

► Moreover, destination xy receives the highest theme suitability rating by the subgroup "visitors in the past" (85%).

► In addition, the table on the right hand side displays the projection of the absolute volume of the attributed theme suitability for each subgroup.

9.1 Reading examples

4.3 Supported theme suitability – *Competitor analysis cat. 2: All considered destinations* [1]
Source market: Germany

DESTINATION BRAND 18	Source market: Germany		Category 2: All considered destinations						
Destination xy (N = 1,000)	**Number of destinations in category** [3]	**Base: All respondents** [4]				**Base: Respondents with interest in the theme** [2]			
		own value		**mean** [5]	**rank**	**own value**		**mean**	**rank**
		in %	**projection***			**in %**	**projection***		
Enjoying culinary / gastronomic specialities [6]		42%	25.9 m	34%	16.	50%	19.1 m	42%	17.
Visiting cultural institutions / using cultural services		58%	36.2 m	30%	3.	72%	19.3 m	41%	3.
Enjoying nature	45	26%	16.2 m	40%	35.	31%	13.3 m	47%	36.
Being active and involved in sports		23%	13.9 m	32%	32.	34%	5.6 m	43%	30.
Taking a city break		48%	29.9 m	29%	5.	58%	21.4 m	35%	4.
Visit to events	11	47%	28.8 m	25%	3.	60%	11.8 m	34%	3.
Using luxury offers	7	21%	13.1 m	17%	4.	27%	3.7 m	32%	5.
Undertaking a sustainable holiday trip	13	19%	11.7 m	25%	8.	32%	6.9 m	39%	7.
Cycling (not mountain biking)	23	32%	19.5 m	34%	13.	42%	7.1 m	46%	15.
Shopping	10	51%	31.8 m	32%	2.	63%	15.4 m	41%	2.

* Projection of the absolute volume for supported theme competence (number of people).

► **Note 1:** Last survey taken into consideration November / December 2018
► **Note 2:** No analysis by sub-group "visitors in the past" as the sample size is insufficient in case of several tourist destinations examined in the survey.

DESTINATION BRAND 18

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

Central question: How can destination xy position itself per theme in the *competitive ranking* in the category "all considered destinations"?
– Reading example: *"Enjoying culinary / gastronomic specialities"*

[6]
► 42% of the represented population consider destination xy as suitable for the holiday activity "Enjoying culinary / gastronomic specialities" (s. column *"own value in %"*). Compared to the average of 34% (s. column *"mean"*), destination xy positions itself above average and ranks 16th out of 45 (s. column *"rank"*) in the category "all considered destinations" (s. left part of the table, base *"all respondents"*).

► The right part of the table additionally displays the evaluation results based on the "respondents with interest in the theme". Even though destination xy receives a higher suitability rating for the theme "Enjoying culinary / gastronomic specialities" by this subgroup of 50% (s. column *"own value in %"*), the achieved rank (17th out of 45; s. column *"rank"*) is a bit lower.

[1]
The results for the supported theme suitability can be compared based on *different categories of competitors*. In this example, the results refer to the category *"all considered destinations"*.

[2]
This overview is based on *"all respondents"* and *"respondents with interest in the theme"*.

[3]
A total of *45 tourist destinations* were investigated in the source market Germany. In the case of the specific themes, the *number of considered destinations varies*, which needs to be taken into account in the interpretation of the results.

[4]
The rankings are based on the *top-two-box values* of the considered tourist destinations in the respective category. Only the values of destination xy are displayed here (column own value).

[5]
The *average of the category* is calculated as the *arithmetic mean* of the top-two-box values of all destinations included in this category.

9.1 Reading examples

4.4 Quadrant analysis
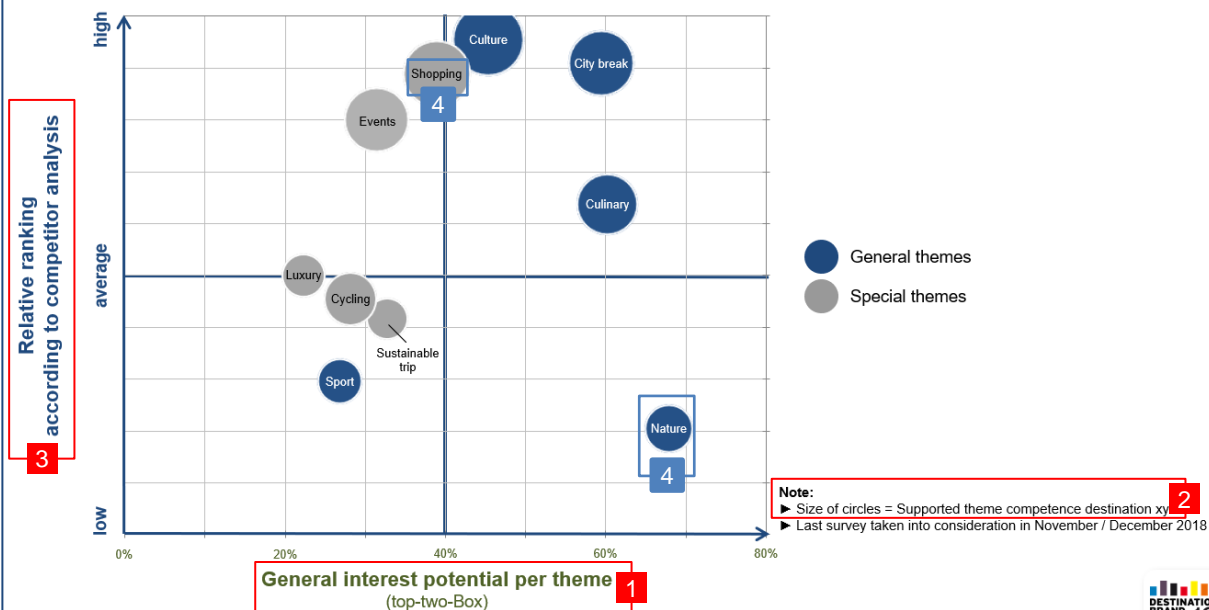
Quadrant analysis Destination xy
> Category for relative ranking according to competitor analysis:
  All considered destinations (up to 45 tourist destinations per theme)

■ *Destination xy*
Source market: Germany
Base: All respondents
Number of respondents: 1,000

Note:
► Size of circles = Supported theme competence destination xy
► Last survey taken into consideration in November / December 2018

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

1 *"Demand"*: The *general interest potential* per theme is expressed by the theme's position on the X-axis (horizontal). The greater the interest in the respective holiday activity, the further to the right the theme is placed on the axis.

2 *"Supply"*: The attributed *theme suitability* of destination xy is represented by the respective size of the "theme circle". The larger the "theme circle", the higher the approval of suitability by the respondents for the theme.

3 *"Competition"*: The *relative competitive ranking* of destination xy in the category "all considered destinations per theme" is depicted by the position of the respective theme on the Y-axis (vertical). The better destination xy performs in the competitive comparison per theme, the higher up the theme is placed on the axis.

Central question: How can the *central results of the three-dimensional competitive analysis* be visually summarised?
– Reading example: *"Nature" & "Shopping"*

5
► The theme "Nature" has a very high general interest potential (see position far right on the X-axis). However, destination xy is attributed a relatively low theme suitability (see smaller "theme circle"), which means that destination xy positions itself below average in the competitor analysis (see position in the lower part of the Y-axis).

► On the other hand, the general interest potential of the German population for the theme "Shopping" is much lower (see position in the middle of the X-axis). Though, destination xy is considered as very suitable for the theme (see bigger "theme circle") and consequently achieves a high relative competitive ranking (see position in the upper part of the Y-axis).

9.1 Reading examples

6.2 Supply: Supported theme suitability – *Sociodemographic differentiation*

Supported theme suitability of the general themes

> *In your opinion, to what extent is the following <u>foreign</u> tourist destination suitable for the holiday activities below (regardless of your own interest in the holiday activities)?*

> *Top-two-box on a scale from "5 = very suitable" to "1 = not at all suitable" (in % of respondents)*   **[1]**

■ *Destination xy*

Source market: Germany
Sociodemography: Age group   **[2]**
Base: All respondents
Number of respondents: 1,000

General themes	total	Age group [3]						Significance* (Kruskal-Wallis-test) [4]
		< 25 y.	25-34 y.	35-44 y.	45-54 y.	55-64 y.	65-74 y.	
Enjoying culinary / gastronomic specialities	42%	27%	32%	42%	55%	53%	43%	sig.
Visiting cultural institutions / using cultural services	58%	39%	45%	56%	72%	68%	65%	sig.
Enjoying nature	26%	--	--	--	--	--	--	n.s.
Being active and involved in sports	23%	34%	29%	25%	21%	19%	17%	sig.
Taking a city break	48%	--	--	--	--	--	--	n.s.

[5]

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* Level of significance min. 0.05 (abbreviations: sig. = significant / n.s. = not significant, for further information see glossary).   **[4]**

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

<u>Central question</u>: What are the differences between age groups with regard to the theme suitability of destination xy?
– Reading example**: *"Visiting cultural institutions / using cultural services" and "Being active and involved in sports"*

► The results by age group are significant in the case of the holiday activities "Visiting cultural institutions / using cultural services" and "Being active and involved in sports" (s. column *"Significance"*). Subsequently, the results can be applied to the general population.

[5]

► In the case of the theme "Culture" the approval rates regarding the theme suitability by the "45-54 year-olds" (72%) and the "55-64 year-olds" (68%) are clearly above the average of all respondents (58%), while only 39% of the "<25 year-olds" and 45% of the "25-34 year-olds" consider destination xy as suitable to visit cultural institutions respectively to use cultural services.

► The opposite tendencies are depicted in case of the holiday activity "Being active and involved in sports". In this example, destination xy is attributed the highest theme suitability by the younger age groups of the "<25 year-olds" (34%) and the "25-34 year-olds" (29%).

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[1]

In each case, the **top-two-box values** are shown, i.e., the value refers to all respondents that answered the question with "5 = very suitable" or the value "4".

[2]

In addition to the univariate evaluation results, several **bivariate analyses** are part of the report. Among others, the approval rates regarding the theme suitability are differentiated by eight **socio-demographic factors**, in this example *"age group"*.

[3]

In case of the criterion "age group" the approval rates can be differentiated by **six age cohorts**.

[4]

The **test of significance** indicates whether the results can be applied to **the overall population** or not. A minimum confidence level of 95% is required for results to be significant. If the results are not significant, they are not reported due to the statistical uncertainty.

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6.3 Supply: Supported theme suitability – *Target group analysis*

Supported theme suitability for the holiday activity:

"Visiting cultural institutions / using cultural services"

> *In your opinion, to what extent is the following <u>foreign</u> tourist destination suitable for the holiday activities below (regardless of your own interest in the holiday activities)?*

> *Top-two-box on a scale from "5 = very suitable" to "1 = not at all suitable" (in % of respondents)* **[1]**
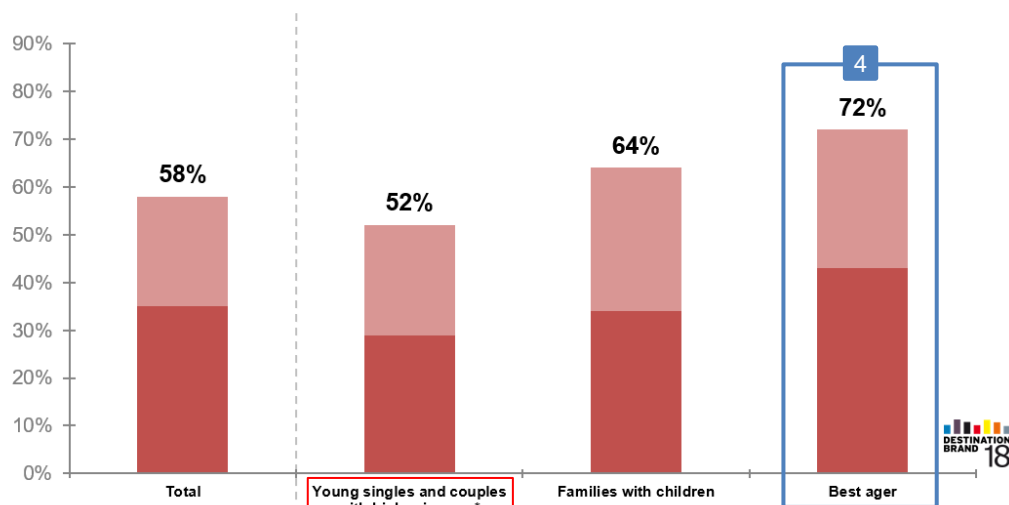
■ *Destination xy*

Source market: Germany
Sociodemography: Target groups **[2]**
Base: All respondents
Number of respondents: 1,000

Bar chart:
- Total: 58%
- Young singles and couples with higher income*: 52% **[3]**
- Families with children: 64%
- Best ager: 72% **[4]**

DESTINATION BRAND 18

* Sample size < 100: Higher statistical uncertainty due to relatively small sample size. **[3]**

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

<u>Central question</u>: Among which **target group** does destination xy achieve the **highest approval** regarding the **theme suitability** for the holiday activity "Visiting cultural institutions / using cultural services"?

[4]
► In this example, the three target groups "Young singles and couples with higher income", "Families with children" and "Best ager" are considered.
► Among the three target groups, the "Best ager" (72%) awarded destination xy the highest theme suitability for the holiday activity "Visiting cultural institutions / using cultural services". Their approval rate is clearly above the average of all respondents (58%).

---

[1]

For each target group, the **top-two-box values** are shown, i.e., the values refer to all respondents that answered the question with "5 = very suitable" or the value "4".

[2]

In addition to the univariate evaluation results, several **bivariate analyses** are part of the report. Among others, the approval rates regarding the theme suitability can be differentiated by **target groups**. In the case of the study Destination Brand 18, target groups can be defined based on different socio-demographic factors considered in the study and the general interest in several holiday themes.

[3]

In the case of the target group "Young singles and couples with higher income", the number of cases is below 100, which means that a **higher level of statistical uncertainty** needs to be taken into consideration.

9.2 Glossary – *Content of the theme competence study*

Content of the theme competence study	
General interest potential	The proportion of the represented population that is generally interested (i.e., regardless of a specific tourist destination) in the respective holiday activity (responses of the top-two-box on a rating scale for assessment of the general interest potential)
Supported theme suitability	The proportion of the represented population that considers the tourist destination to be suitable for the respective holiday activity – regardless of one's own interest in the holiday activity concerned (responses of the top-two-box on a rating scale for assessment of the theme suitability)
Unsupported theme suitability (top of mind)	The proportion of the represented population that spontaneously considers the tourist destination to be particularly suitable for the respective type of holiday without being provided answer options

Sub-groups	
Suitability assessor	Respondents who consider the tourist destination to be suitable for the respective holiday activity (top-two-box value) – regardless of their own interest in the holiday activity concerned
Distinct intention to travel abroad	Respondents who definitely (top value) intend to spend a short holiday trip (with 1 – 3 overnight stays) and / or a longer holiday trip (with 4 or more overnight stays) abroad within the next 3 years
Interested in the theme	Respondents who are generally interested (i.e., regardless of a specific tourist destination) in the respective holiday activity (top-two-box value)
Visitors in the past	Respondents who have already holidayed in the tourist destination (with at least one overnight stay)

9.2 Glossary – *Description of holiday activities*

		Description of holiday activities per question (part 1 of 2)		
No.	**Short version in report**	**General interest potential per holiday activity** ➢ *Original description according to questionnaire*	**Unsupported theme suitability (top of mind)** ➢ *Original description according to questionnaire*	**Supported theme suitability per destination** ➢ *Original description according to questionnaire*
1	**Culinary**	Enjoying culinary / gastronomic specialities	To go on a culinary journey	Enjoying culinary / gastronomic specialities
2	**Culture**	Visiting cultural institutions / using cultural services	To go on a cultural journey / holiday	Visiting cultural institutions / using cultural services
3	**Nature**	Enjoying nature	To go on a nature-based holiday	Enjoying nature
4	**Sports**	Being active and involved in sports	To go on an active sports holiday	Being active and involved in sports
5	**City break**	Taking a city break	To go on a city break	Taking a city break
6	**Amusement parks**	Visiting amusement / theme parks		A visit to amusement / theme parks
7	**Castles**	Visiting castles, palaces and cathedrals		A visit to castles, palaces and cathedrals
8	**Countryside**	Spending holidays in the countryside (e.g., on the farm or vineyard)		Spending holidays in the countryside (e.g., on the farm or vineyard)
9	**Climbing fixed mountain routes**	Climbing fixed mountain routes (Via ferrata)		Climbing fixed mountain routes (Via ferrata)
10	**Cycling**	Cycling		Cycling
11	**Events**	Attending events		Attending events
12	**Families**	Using family offers		Using family offers
13	**Football**	Attending football matches / visiting stadiums as well as other attractions / events related to football		Attending football matches / visiting stadiums as well as other attractions / events related to football
14	**Gardens / parks**	Visiting gardens / parks		A visit to gardens / parks
15	**Health**	Using health services (self-paying, not a prescribed visit to a health spa)		Using health services (self-paying, not a prescribed visit to a health spa)
16	**Hiking**	Hiking		Hiking
17	**Indigenous peoples**	Meeting the indigenous (native) peoples		Meeting the indigenous (native) peoples

► **Note:** Last survey taken into consideration in November / December 2018

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

9.2 Glossary – *Description of holiday activities*

No.	*Short version in report*	General interest potential per holiday activity ➢ *Original description according to questionnaire*	Unsupported theme suitability (top of mind) ➢ *Original description according to questionnaire*	Supported theme suitability per destination ➢ *Original description according to questionnaire*
		Description of holiday activities per question (part 2 of 2)		
18	**Industrial heritage**	Visiting industrial heritage sites (e.g., factories, (coal) mines, museums of industrial heritage)		A visit to industrial heritage sites (e.g., factories, (coal) mines, museums of industrial heritage)
19	**Lively places**	Experiencing lively places (e.g., trendy shopping districts, festivals, alternative cultural circles, night life)		Experiencing lively places
20	**Luxury offers**	Using luxury offers		Using luxury offers
21	**Motorcycling**	Motorcycling		Motorcycling
22	**Mountain biking**	Mountain biking		Mountain biking
23	**Mountaineering**	Mountaineering (e.g., mountain and summit tours)		Mountaineering (e.g., mountain and summit tours)
24	**Relaxation**	Relaxing and resting		Relaxing and resting
25	**Shopping**	Shopping		Shopping
26	**Study / educational offers**	Using study / educational offers		Using study / educational offers
27	**Sustainable trip**	Undertaking a sustainable holiday trip (nature preserving / environmentally friendly, economically and socially fair)		Undertaking a sustainable holiday trip (nature preserving / environmentally friendly, economically and socially fair)
28	**Swimming / beach**	Swimming and being at the beach		Swimming and being at the beach
29	**Thalasso**	Using thalasso services (e.g., therapy with sea water, algae, sand)		Using thalasso services (e.g., therapy with sea water, algae, sand)
30	**UNESCO world heritage sites**	Visiting UNESCO world heritage sites		A visit to UNESCO world heritage sites
31	**Water sports**	Practising water sports (not sailing)		Practising water sports (not sailing)
32	**Wellness**	Using wellness services		Using wellness services
33	**Winter sports**	Practising winter sports (e.g., cross-country skiing, downhill)		Practising winter sports (e.g., cross-country skiing, downhill)

► **Note:** Last survey taken into consideration in November / December 2018

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

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