inspektour TOURISM AND MARKET RESEARCH

FH Westküste University of Applied Sciences

DESTINATION BRAND 19: First results from China

March 2020

Expanding horizons

DESTINATION BRAND 19: First results from China

In the frame of DESTINATION BRAND 19, the Institute for Management and Tourism (IMT) of the FH Westküste and the inspektour (international) GmbH measured the **customer-oriented perceptions of international tourist destinations** (countries, regions and cities) **for the first time in China**. Based on a sample drawn from the IPSOS Access Panel, 1,005 Chinese with affinity to travel abroad were queried online in autumn 2019. This document contains first selected results of this latest DESTINATION BRAND 19 survey.

Outline

- DESTINATION BRAND 19: Key facts methods
- DESTINATION BRAND 19: First results from China
  - Brand awareness of foreign tourist destinations
  - Bucket list next holiday trip
  - Spontaneous associations with selected foreign tourist destinations
  - General interest in holiday activities
  - Important aspects for selection of tourist destination
- Conclusion

DESTINATION BRAND at a glance

Study series in a 5-year-circle

Since 2009 in Germany

Annually changing research focus

1. Brand value
2. Theme competence
3. Image / profile

Tourist destinations >450

Since 2018: AT, CH, NL and 2019 CN

From 2020: FR, ES, IT, UK and USA

11 years DESTINATION BRAND

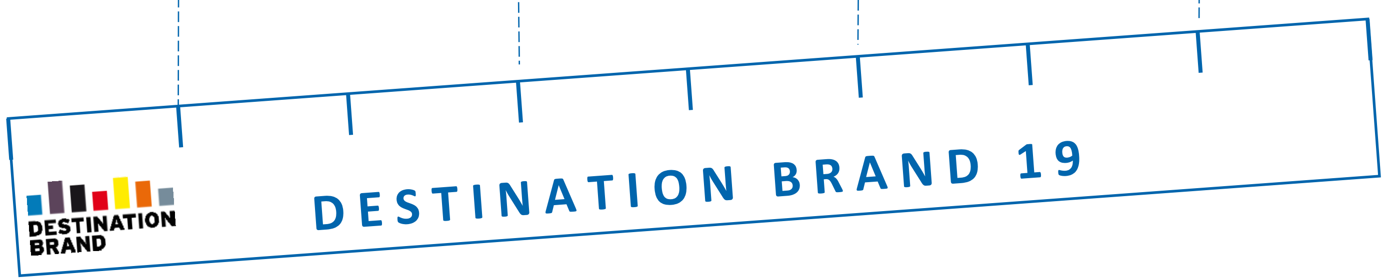
DESTINATION BRAND 19 I Key facts methods survey in China

Research focus:
Perception of European destinations

Online-survey
via Ipsos Access Panel

Field work:
Nov. / Dec. 19

Language:
mandarine

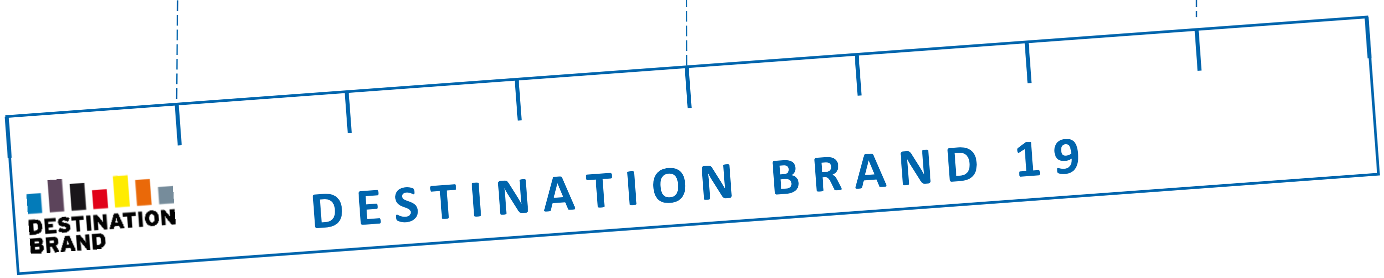


DESTINATION BRAND 19 I Key facts methods survey in China

Sample: Representative of the Ipsos panel members in China, i. e. urban Chinese population (tier 1 to 3 cities* without Hongkong and Macau) aged 14-59 (**quota sample** according to age, gender and regional origin)

Sample characteristics: high educational level, net household income and share of employees with managerial function and: high affinity to travel abroad**

Sample size: Respondents with affinity to travel abroad*** (n = 1,005)



*Chinese cities are classified into different tiers based on their population, economic size and political ranking: Tier 1: big cities (e.g. Beijing, Shanghai), Tier 2: capital city of province, Tier 3: prefecture level city under province

**Definition of affinity to travel abroad: Condition 1: have travelled abroad in the last 3 years (with at least 1 overnight stay) and / or Condition 2: hold a valid passport (or have applied for it or plan to apply for it within the next 3 years) and are willing to travel abroad within the next 3 years (with at least 1 overnight stay)

*** All results on the following slides refer to respondents with affinity to travel abroad according to the definition above

DESTINATION BRAND 19: First results from China

Keep in mind:
Due to different sample characteristics no comparison to results from further source markets possible!

Brand awareness

(unsupported)

When considering

a holiday for a stay of at least one night,

which foreign tourist destinations spring to your mind?

Brand awareness (unsupported) – *Top 20 foreign tourist destinations*

Brand awareness (unsupported) of foreign tourist destinations					
1	Japan	*45.2%*	11	Germany	*7.6%*
2	Thailand	*29.6%*	11	Paris	*7.6%*
3	USA	*21.0%*	13	Italy	*6.4%*
4	South Korea	*20.6%*	14	Maldives	*5.9%*
5	Singapore	*19.7%*	15	Switzerland	*5.5%*
6	France	*17.6%*	16	Canada	*4.8%*
7	Australia	*16.8%*	16	Vietnam	*4.8%*
8	United Kingdom	*11.0%*	18	Tokyo	*4.2%*
9	New Zealand	*8.3%*	18	Hong Kong (special administrative region)	*4.2%*
10	Malaysia	*7.7%*	20	New York	*3.9%*

Source market: China I Number of respondents: 992 | Number of valid responses: 3,162 | Share values (in % of respondents)

Source: IMT of the FH Westküste / inspektour (international) GmbH, 2019

Brand awareness (unsupported) – *Top 20 foreign tourist destinations*

Brand awareness (unsupported) of foreign tourist destinations					
1	Japan	*45.2%*	11	Germany	*7.6%*
2	Thailand	*29.6%*	11	Paris	[illegible]
3	USA	*21.0%*	13	Italy	[illegible]
4	South Korea	*20.6%*	14	Maldives	[illegible]
5	Singapore	*19.7%*	15	Switzerland	[illegible]
6	France	*17.6%*	16	Canada	[illegible]
7	Australia	*16.8%*	16	Vietnam	*4.8%*
8	United Kingdom	*11.0%*	18	Tokyo	*4.2%*
9	New Zealand	*8.3%*	18	Hong Kong (special administrative region)	*4.2%*
10	Malaysia	*7.7%*	20	New York	*3.9%*

Average of 3.2 valid responses per respondent

Source market: China I Number of respondents: 992 | Number of valid responses: 3,162 | Share values (in % of respondents)

Source: IMT of the FH Westküste / inspektour (international) GmbH, 2019

When you think about a holiday trip of at least one night, which tourist destinations specifically in Germany will pop up into your mind?

Brand awareness (unsupported) – *Top 20 German tourist destinations*

Brand awareness (unsupported) of German tourist destinations					
1	Berlin	*64.4%*	11	Black Forest	*2.6%*
2	Munich	*50.0%*	12	Bavaria	*2.2%*
3	Hamburg	*24.0%*	12	Leipzig	*2.2%*
4	Frankfurt	*19.7%*	14	Dresden	*2.1%*
5	Cologne	*14.9%*	15	Bonn	*1.8%*
6	Heidelberg	*7.5%*	16	Bremen	*1.7%*
6	Neuschwanstein	*7.5%*	17	Rügen	*1.6%*
8	Stuttgart	*4.5%*	18	Hannover	*1.5%*
9	Rhine	*4.0%*	19	Dortmund	*1.3%*
10	Nuremberg	*3.2%*	19	King Lake	*1.3%*

Source market: China I Number of respondents: 818 | Number of valid responses: 1,908 | Share values (in % of respondents)

Source: IMT of the FH Westküste / inspektour (international) GmbH, 2019

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Brand awareness (unsupported) – *Top 20 German tourist destinations*

Brand awareness					estinations
1	Berlin				2.6%
2	Munich				2.2%
3	Hamburg				2.2%
4	Frankfurt	19.7%			
5	Cologne	14.9%	15	Bonn	
6	Heidelberg	7.5%	16	Bremen	
6	Neuschwanstein	7.5%	17	Rügen	
8	Stuttgart	4.5%	18	Hannover	
9	Rhine	4.0%	19	Dortmund	1.3%
10	Nuremberg	3.2%	19	King Lake	1.3%

Only 19% of respondents with invalid answers

Average of 2.3 valid responses per respondent

Source market: China I Number of respondents: 818 | Number of valid responses: 1,908 | Share values (in % of respondents)

Source: IMT of the FH Westküste / inspektour (international) GmbH, 2019

Bucket list

(unsupported)

For a holiday trip of at least one night, what are the <u>foreign tourist destinations</u> you would like to visit next?

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Plans for next travel abroad – *Top 20 foreign tourist destinations*

Plans for next travel abroad (unsupported)					
1	Japan	*17.2%*	11	Australia	*6.4%*
2	Paris	*12.2%*	12	New York	*5.2%*
3	Thailand	*11.6%*	12	United Kingdom	*5.2%*
4	Singapore	*9.6%*	14	Switzerland	*4.5%*
5	Tokyo	*9.3%*	15	London	*4.0%*
6	France	*7.5%*	16	Maldives	*3.9%*
7	Germany	*7.3%*	17	Munich	*3.8%*
8	Berlin	*6.8%*	18	Seoul	*3.6%*
9	USA	*6.7%*	19	Bangkok	*3.5%*
10	Korea	*6.6%*	20	Bali	*3.3%*

Source market: China I Number of respondents: 959 | Number of valid responses: 1,989 | Share values (in % of respondents)

Source: IMT of the FH Westküste / inspektour (international) GmbH, 2019

DESTINATION BRAND 19

Plans for next travel abroad – *Top 20 foreign tourist destinations*

Plans for next travel abroad (unsupported)

1	Japan	*17.2%*	11	Australia	[illegible]
2	Paris	*12.2%*	12	New York	[illegible]
3	Thailand	*11.6%*	12	United Kingd	[illegible]
4	Singapore	*9.6%*	14	Switzerland	[illegible]
5	Tokyo	*9.3%*	15	London	[illegible]
6	France	*7.5%*	16	Maldives	*3.9%*
7	Germany	*7.3%*	17	Munich	*3.8%*
8	Berlin	*6.8%*	18	Seoul	*3.6%*
9	USA	*6.7%*	19	Bangkok	*3.5%*
10	Korea	*6.6%*	20	Bali	*3.3%*

Average of 2.1 valid responses per respondent

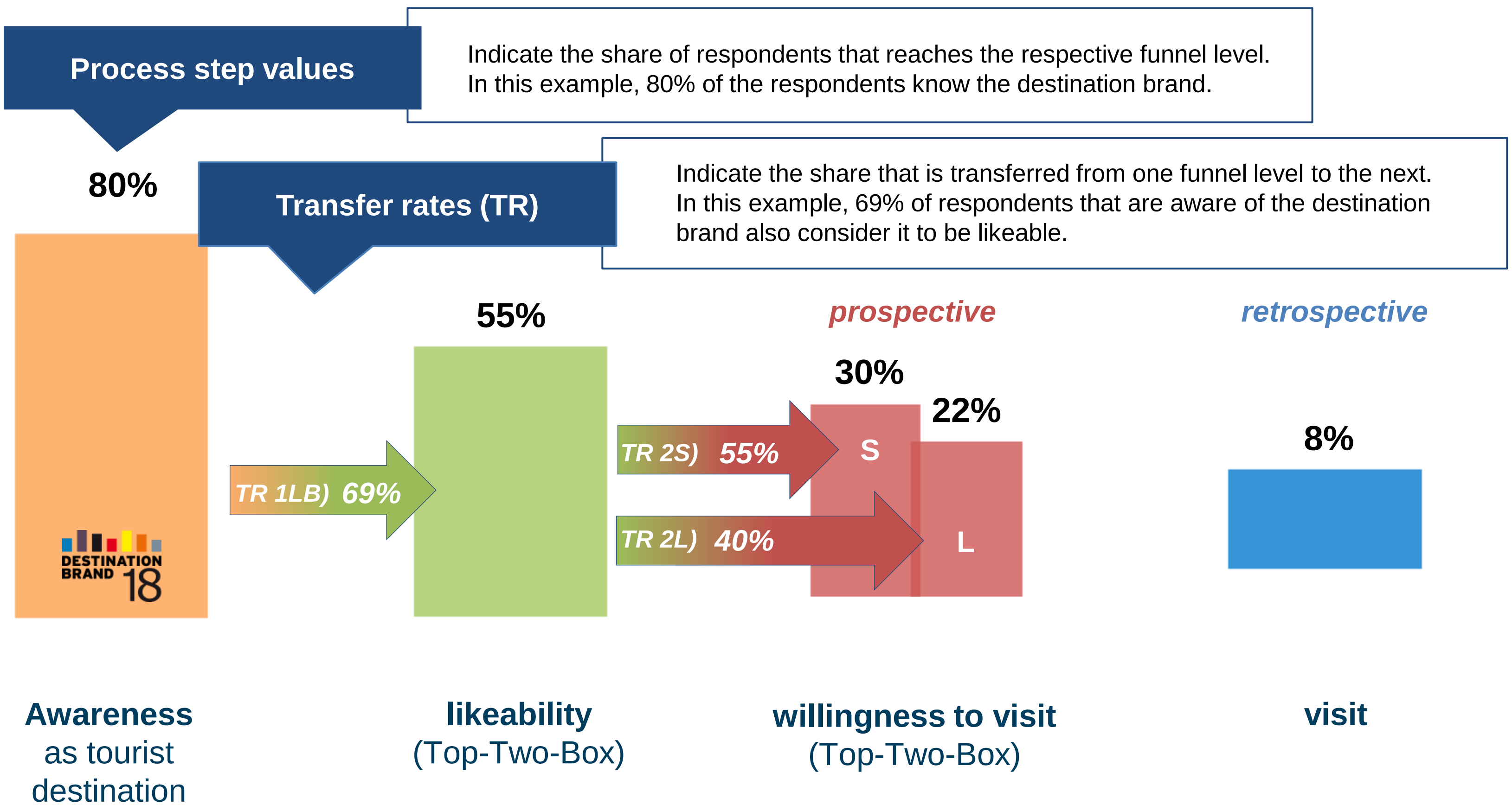
Source market: China I Number of respondents: 959 | Number of valid responses: 1,989 | Share values (in % of respondents)

Source: IMT of the FH Westküste / inspektour (international) GmbH, 2019

Brand funnel

(supported brand awareness, likeability, willingness to visit)

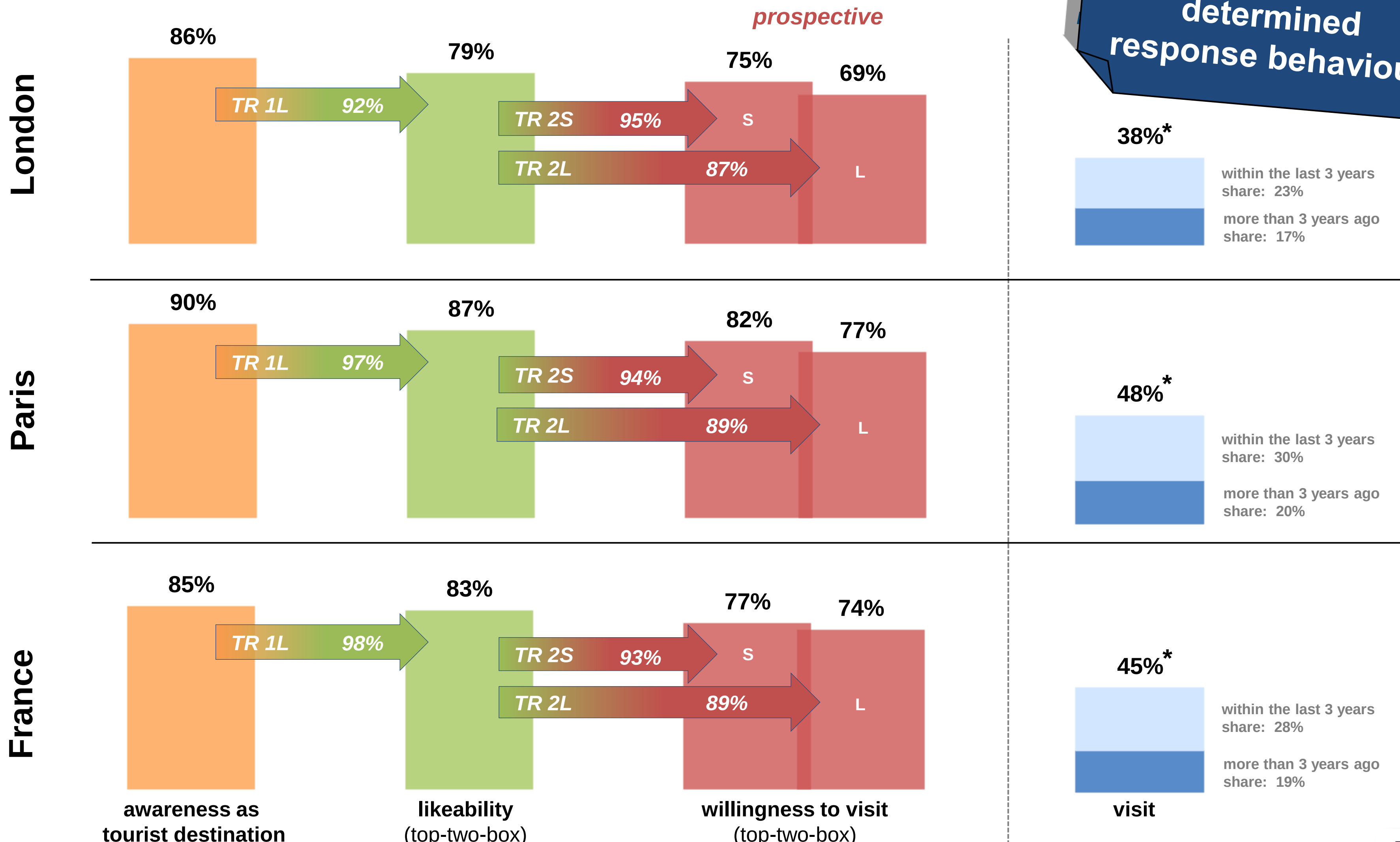
Brand funnel – *the model at a glance*



Source: Institut für Management und Tourismus (IMT), 2009

Brand funnel – *Individual results for London, Paris and France*

Keep in mind:
Different culturally determined response behaviour



Source market: China | Base: All respondents | Number of respondents: 1,005

Source: IMT of the FH Westküste / inspektour (international) GmbH, 2019

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

Spontaneous associations

Top 10 for Berlin, London and Paris

+

Top 10 for Paris and France

When thinking about the foreign tourist destination _______________,

what comes spontaneously into your mind?

Spontaneous associations – *Top 10 for Berlin (Word Cloud)*

long history
German Reichstag building
Berlin Cathedral
attractive
Berlin Wall
German capital
Brandenburg Gate
Museum Island
2nd World War
economically developed

Note: The illustration is based on the quantitative distribution of the top 10 association sub categories of Berlin in the source market China (base: all respondents), i.e. the larger the respective sub category is presented, the more frequently – but not linearly – it is associated with the destination Berlin.

Source: IMT of the FH Westküste / inspektour (international) GmbH, 2019

Spontaneous associations – *Top 10 for Berlin, London and Paris*

	Top 10 sub categories of Berlin			Top 10 sub categories of London			Top 10 sub categories of Paris	
1	(Berlin) **Wall** / East Side Gallery / Checkpoint Charlie	***25.0%***	1	**Big Ben** / Elizabeth Tower	***20.9%***	1	**Eiffel Tower**	***36.9%***
2	(Berlin) **Cathedral**	***11.2%***	2	**Buckingham Palace** / Royal Palace	***14.5%***	2	**romantic** (feelings) / (being in) **love** / marriage proposal / honeymoon	***28.0%***
3	(German) **capital**	***8.9%***	3	**British Museum**	***13.1%***	3	Cathedral **Notre Dame**	***22.8%***
4	(German) **Reichstag building**	***8.4%***	4	(much) **fog / rain / wet** / (very) cold / (always) bad weather	***11.0%***	4	(international, top) **fashion**	***19.2%***
5	(long) **history** / historically interesting	***7.1%***	5	(London) **Tower Bridge**	***10.9%***	5	**Louvre** (Museum) / (the smile of) Mona Lisa	***18.1%***
6	**Brandenburg Gate**	***7.0%***	6	(river) **Thames**	***10.9%***	6	**Arc of Triumph**	***14.8%***
7	(economically) **developed** / (developed) **industry** / (world-class) **economy**	***6.8%***	7	(London) **Eye**	***9.1%***	7	(river) **Seine**	***8.9%***
8	(monument of the) **2nd World War**	***5.8%***	8	(English) **Gentleman** / old school / polite / etiquette	***5.9%***	8	general **positive assessment**	***7.3%***
9	general **positive assessment**	***5.8%***	9	general **positive assessment**	***5.7%***	9	**luxury** (goods, cars, bags) / luxurious / elegant / noble / high quality	***6.9%***
10	**Museum Island**	***5.3%***	10	**fashion** / fashionable	***4.8%***	10	(French) **perfume / cosmetics**, e.g. Chanel, l'Oreal	***6.8%***

Source market: China I Number of respondents: 1,005 per destination | Share values (in % of respondents)

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Spontaneous associations – *Top 10 for Paris and France*

	Top 10 sub categories of Paris			Top 10 sub categories of France	
1	**Eiffel Tower**	***36.9%***	1	**romantic** (feelings) / (being in) love	***33.2%***
2	**romantic** (feelings) / (being in) **love** / marriage proposal / honeymoon	***28.0%***	2	**Eiffel Tower**	***23.0%***
3	Cathedral **Notre Dame**	***22.8%***	3	(capital) **Paris / romantic city**	***22.3%***
4	(international, top) **fashion**	***19.2%***	4	(French, country of) **fashion**	***12.5%***
5	**Louvre** (Museum) / (the smile of) Mona Lisa	***18.1%***	5	Cathedral **Notre Dame**	***10.6%***
6	**Arc of Triumph**	***14.8%***	6	**Louvre** (Museum) / (the smile of) Mona Lisa	***10.3%***
7	(river) **Seine**	***8.9%***	7	(French) **perfume / cosmetics**, e.g. Chanel, l'Oreal	***9.1%***
8	general **positive assessment**	***7.3%***	8	**Arc of Triumph**	***9.0%***
9	**luxury** (goods, cars, bags) / luxurious / elegant / noble / high quality	***6.9%***	9	(good, red, grape, French) **wine / champagne**	***8.5%***
10	(French) **perfume / cosmetics**, e.g. Chanel, l'Oreal	***6.8%***	10	general **positive assessment**	***8.3%***

Source market: China I Number of respondents: 1,005 per destination | Share values (in % of respondents)

Source: IMT of the FH Westküste / inspektour (international) GmbH, 2019

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Spontaneous associations – *Top 10 for Paris and France*

	Top 10 sub categories of Paris			Top 10 sub categories of France	
1	**Eiffel Tower**	***36.9%***	1	**romantic** (feelings) / (being in) love	***33.2%***
2	**romantic** (feelings) / (being in) **love** / marriage proposal / honeymoon	***28.0%***	2	**Eiffel Tower**	***23.0%***
3	Cathedral **Notre Dame**	***22.8%***	3	(capital) **Paris / romantic city**	***22.3%***
4	(international, top) **fashion**	***19.2%***	4	(Fren	***12.5%***
5	**Louvre** (Museum) / (the smile of) Mona Lisa	***18.1%***	5	Cath	***10.6%***
6	**Arc of Triumph**	***14.8%***	6	**Lou** na Lisa	***10.3%***
7	(river) **Seine**	***8.9%***	7	(Fren e.g. Chanel, l'Oreal	***9.1%***
8	general **positive assessment**	***7.3%***	8	**Arc of Triumph**	***9.0%***
9	**luxury** (goods, cars, bags) / luxurious / elegant / noble / high quality	***6.9%***	9	(good, red, grape, French) **wine / champagne**	***8.5%***
10	(French) **perfume / cosmetics**, e.g. Chanel, l'Oreal	***6.8%***	10	general **positive assessment**	***8.3%***

With France Chinese respondents mainly associate Parisian attractions and Paris itself

Source market: China I Number of respondents: 1,005 per destination | Share values (in % of respondents)

Source: IMT of the FH Westküste / inspektour (international) GmbH, 2019

General interest in holiday activities

The following question is about your general interest in the holiday activities, i.e. they have nothing to do with any specific tourist destination.

How much are you interested in the following touristic holiday activities in your holiday with a stay of at least one night?

1 (=" not at all interested*") to 5 (="* very interested*")*

General interest potential – *All considered holiday activities*

Ranking of the considered holiday activities with regard to the general interest potential (Top-value = very interested; Mean = 24%)					
1	Enjoying culinary / gastronomic specialities	***42%***	11	Shopping	***28%***
2	Enjoying nature	***40%***	12	Visiting UNESCO world heritage sites	***27%***
3	Visiting castles, palaces and cathedrals	***37%***	13	Undertaking a sustainable holiday trip (nature preserving / environmentally friendly, economically and socially fair)	***27%***
4	Relaxing and resting	***35%***	14	Fine dining	***25%***
5	Experiencing local culture	***34%***	15	Using luxury offers	***25%***
6	Visiting amusement / theme parks	***31%***	16	Discovering lesser known destinations (away from mass tourism)	***24%***
7	Swimming and being at the beach	***30%***	17	Visiting cultural institutions / using cultural services	***24%***
8	Spending holidays in the countryside (e.g., on the farm or vineyard)	***29%***	18	Taking a city break	***24%***
9	Visiting gardens / parks	***29%***	19	Using family offers	***24%***
10	Experiencing lively places (e.g., trendy shopping districts, festivals, alternative cultural circles, night life)	***28%***	20	Immersing yourself in new adventures	***23%***

Source market: China I Base: All respondents | Number of respondents: 1,005 I Top-value on a scale from "5 = very interested" to "1 = not at all interested"

Source: IMT of the FH Westküste / inspektour (international) GmbH, 2019

► **Note:** Last survey taken into consideration in November / December 2019

General interest potential – *All considered holiday activities*

Ranking of the considered holiday activities with regard to the general interest potential (Top-value = very interested, in %; Mean = 24%)					
21	Using thalasso services (e.g., therapy with sea water, algae, sand)	***23%***	31	Visiting industrial heritage sites (e.g., factories, (coal) mines, museums of industrial heritage)	***19%***
22	Visiting film locations	***22%***	32	Cycling (not mountain biking)	***18%***
23	Attending events	***22%***	33	Being active and involved in sports	***17%***
24	Mountaineering (e.g., mountain and summit tours)	***21%***	34	Using study / educational offers	***17%***
25	Practising winter sports (e.g., cross-country skiing, downhill)	***21%***	35	Mountain biking	***17%***
26	Attending football matches / visiting stadiums as well as other attractions / events related to football	***20%***	36	Using health services (self-paying, not a prescribed visit to a health spa)	***15%***
27	Practising water sports (not sailing)	***20%***	37	Motorcycling	***15%***
28	Using wellness services	***19%***	38	Climbing fixed mountain routes (Via ferrata)	***14%***
29	Hiking	***19%***			
30	Meeting the indigenous (native) peoples	***19%***			

Source market: China I Base: All respondents | Number of respondents: 1,005 I Top-value on a scale from “5 = very interested” to “1 = not at all interested”

Source: IMT of the FH Westküste / inspektour (international) GmbH, 2019

► **Note:** Last survey taken into consideration in November / December 2019

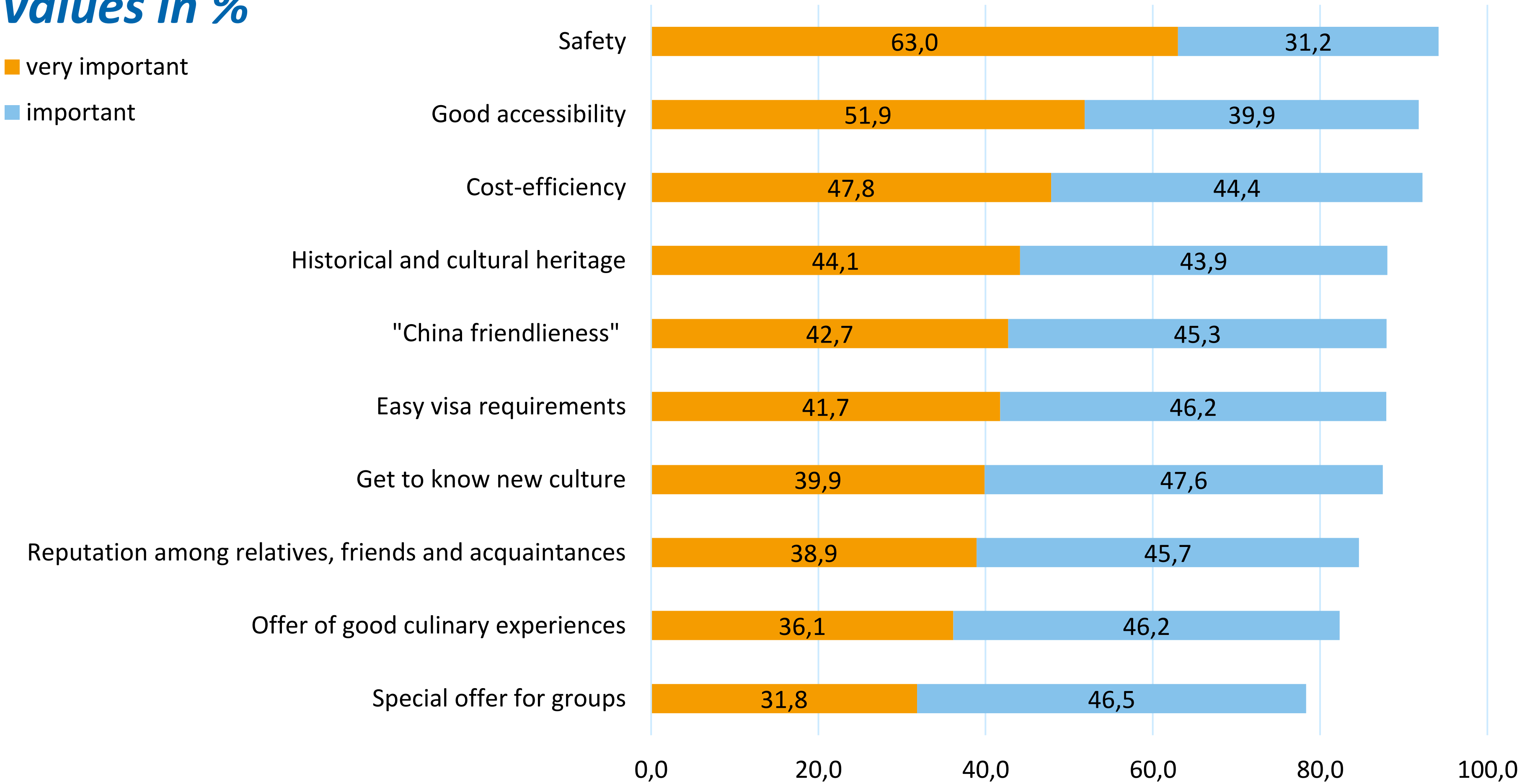
Further results and trends

Important aspects for selection of tourist destination

Now, we want to know the importance of the following aspects for your selection of tourist destinations.

Please give a score of
1 (=”not important at all”) to 5 (=”very important”).
If it’s an intermediate value, you can adjust the score.

Important aspects for selection of tourist destination – *Top 2 values in %*



Source market: China I Base: All respondents | Number of respondents: 1,005 I Top-two-box and Top-values on a scale from “5 = very important” to “1 = not at all important”

Source: IMT of the FH Westküste / inspektour (international) GmbH, 2019

Putting it all in a nutshell

- **It`s not all about the destination “Europe”** - strong country, city and regional destination brands with individual images exist in the minds of the respondents.

- **On top of the bucket list are Asian destinations**, however France, Germany and Berlin are also among the Top 10 destinations to be visited next.

- **Culinary or nature experiences** are on the forerun, while interest in active holidays is small; shopping as a holiday interest is over-estimated.

Source: IMT of the FH Westküste / inspektour (international) GmbH, 2019

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TOURISM AND MARKET RESEARCH

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Overview of the considered destinations

	DE	AT	CH	NL	CN
1. Allgäu	x				
2. Austria					x
3. Bavaria	x				
4. Bavarian Forest	x				
5. Bergisches Land	x				
6. Berlin	x				x
7. Black Forest	x		x		x
8. City of Cottbus	x				
9. Dresden	x	x	x	x	
10. Duisburg	x				
11. Düsseldorf	x		x	x	x
12. East Frisian Islands	x				
13. Erzgebirge	x				
14. France		x			x
15. Franconia - wine.beautiful.country	x				
16. Garmisch-Partenkirchen		x	x		
17. German Fairy Tale Route	x				
18. Germany		x	x	x	x
19. Great Britain	x				
20. Havelland	x				
21. Ireland		x	x		
22. Island of Usedom	x				
23. Italy	x				
24. Karlsruhe	x		x	x	
25. Kassel	x				
26. Langeoog	x				
27. Latvia	x	x	x		
28. Leipzig	x				
29. London					x
30. Lüneburg Heath	x				
31. Luxembourg	x	x	x	x	
32. Munich	x				
33. Münsterland	x				
34. Netherlands	x				
35. Norderney	x				
36. North Rhine-Westphalia	x				
37. Paris					x
38. Rheingau	x				
39. Rhön	x			x	
40. Rothenburg ob der Tauber	x				
41. Saarland	x				
42. Salzburger Land	x				
43. Saxonian Elbland	x				
44. Saxony	x	x	x	x	
45. Saxony-Anhalt	x				
46. Schleswig-Holstein Wadden Sea National Park	x				
47. Spain					x
48. Stuttgart	x				
49. Switzerland					x
50. Upper Palatinate Forest	x				
51. Vorarlberg	x		x		
52. Weserbergland	x				
53. Western Pomerania	x				
54. Wilder Kaiser - Ellmau, Going, Scheffau, Söll			x		
55. Winterberg	x			x	

Note 1: The source markets are marked in green, if the respective destination was surveyed there in the course of the study Destination Brand 19.

Note 2: Last survey taken into consideration November / December 2019

Source: inspektour (international) GmbH / IMT of the FH Westküste, 2019

Overview study series Destination Brand

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	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: Potential of future short trips and longer holiday trips – Visits in the past – DB15: Willingness to recommend – Target group- and competitor analysis	– General interest in holiday activities and their relevance as a travel motive (both regardless of a specific destination) – 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 selec-tion (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** for 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	DESTINATION BRAND 09	DESTINATION BRAND 12	DESTINATION BRAND 15	DESTINATION BRAND 18	DESTINATION BRAND 10	DESTINATION BRAND 13	DESTINATION BRAND 16	DESTINATION BRAND 18	DESTINATION BRAND 11	DESTINATION BRAND 14	DESTINATION BRAND 17	DESTINATION BRAND 19
– Source markets	DE	DE	DE	DE | AT | CH | NL	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	10,500	16,000	17,000	12,000	10,000	11,000	17,000	8,000
– Total number of destinations	141	160	172	76*	141	160	172	76*	M1: 104 M2: 22	M1: 115 M2: 21	M1: 170 M2: 170	55**
– Number of themes / characteristics	--	--	--	--	5 gen. + 25 specific	5 gen. + 50 specific	6 gen. + 57 specific	5 gen. + 28 specific	6 gen. + 50 specific	6 gen. + 56 specific	8 gen. + 59 specific	solely spontaneous associations

* In the study DB18 some destinations were surveyed in two or more source markets; distribution among source markets: DE = 45 | AT = 22 | CH = 33 | NL = 33.
** In the study DB19 some destinations were surveyed in two or more source markets; distribution among source markets: DE = 45 | AT = 8 | CH = 12 | NL = 8 | CN = 10.