

DESTINATION BRAND goes international: Measuring the customer-oriented perception of destination brands on a national and international scale

Ellen Böhling, inspektour

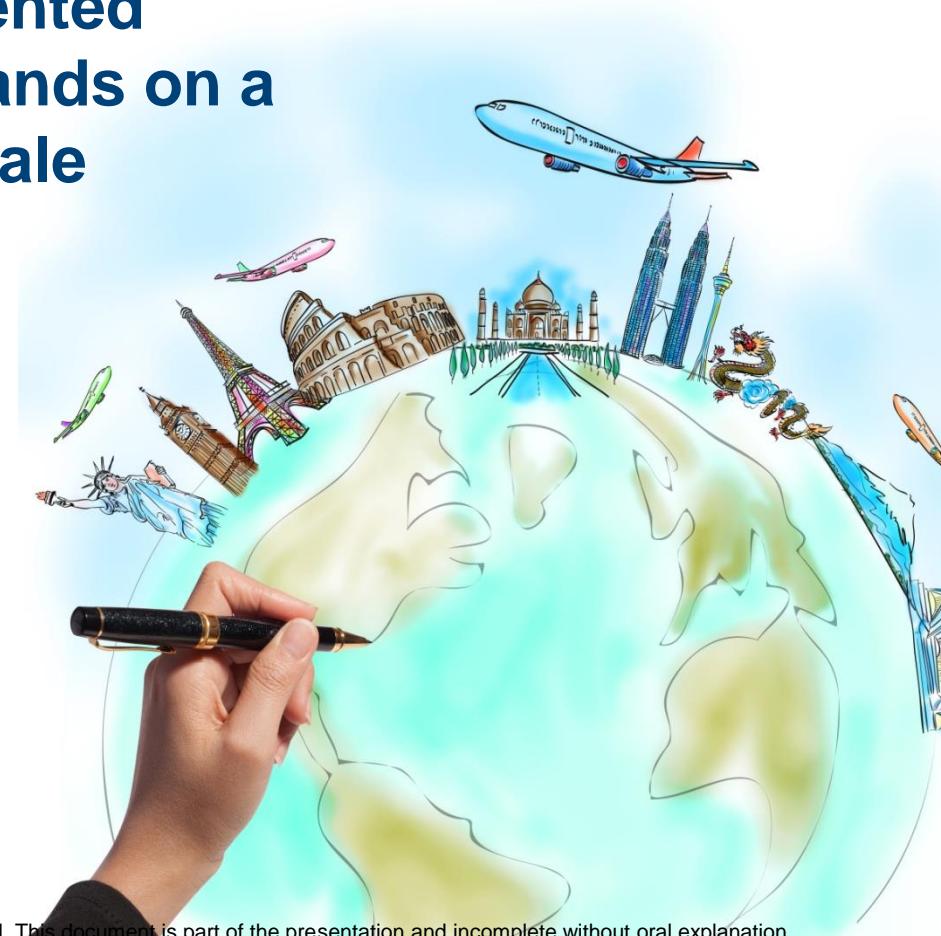
Anne Köchling, FH Westküste

Berlin, 08.03.2018



Picture: shutterstock.com

All parts of this document are protected by copyright. © 2019 inspektour international GmbH. This document is part of the presentation and incomplete without oral explanation.



Outline

- ▶ Research team and partner
- ▶ Short introduction of research background and topic
- ▶ Study series Destination Brand in Germany
- ▶ Introduction of Destination Brand in other countries



Picture: shutterstock.com

Outline

- ▶ **Research team and partner**
- ▶ Short introduction of research background and topic
- ▶ Study series Destination Brand in Germany
- ▶ Introduction of Destination Brand in other countries



Picture: shutterstock.com

DESTINATION BRAND I Team

Project management: 
TOURISM AND MARKET RESEARCH

About inspektour

- ▶ Founded in 2002
- ▶ Management consultancy and tourism research, principally for holiday destinations
- ▶ Since 2002: Cooperation with the FH Westküste / University of Applied Sciences
- ▶ Since 2014 project management and implementation of DESTINATION BRAND in Germany
- ▶ Since 2015 an internationally operating company too – focus on tourism research and DESTINATION BRAND
- ▶ About 15 years of experience in tourism research and development

Team
DESTINATION
BRAND
inspektour



DESTINATION BRAND I Team

Project management:

Academic partner:

About the Institute for Management and Tourism at FH Westküste

- ▶ Founded in 2006 as an internal institute at the FH Westküste / University of Applied Sciences in Heide, Germany
- ▶ Projects for and in co-operation with the industry as well as publicly funded projects
- ▶ Initiation and implementation of Destination Brand study series in Germany from 2009-2014
- ▶ Scientific accompaniment of the project and financial support for set up and basic research
- ▶ Gaining detailed knowledge on modern destination brand management for assuring a high-level qualification of students



DESTINATION BRAND I Team

Project management: **inspektour**
TOURISM AND MARKET RESEARCH

Academic partner: **FH Westküste**
University of Applied Sciences

Academic partner Netherlands:



Competence partner:



Industry partner:



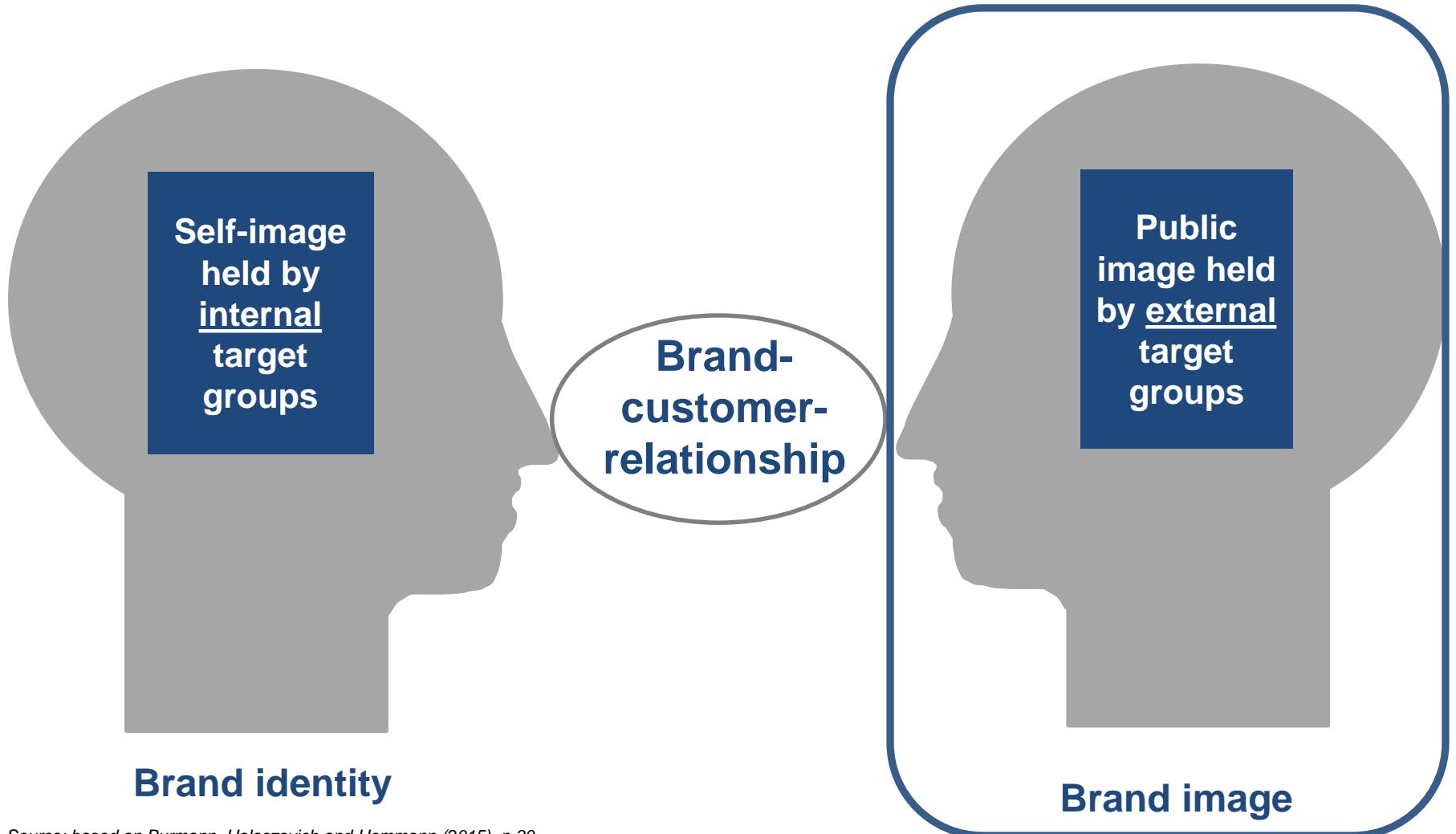
Outline

- ▶ Research team and partner
- ▶ **Short introduction of research background and topic**
- ▶ Study series Destination Brand in Germany
- ▶ Introduction of Destination Brand in other countries



Picture: shutterstock.com

Concept of identity based brand management



Source: based on Burmann, Halaszovich and Hemmann (2015), p 30.

Realizing and avoiding dissonances

Brand identity:

**Desired public
image**



Brand image:

**Real public
image**

Picture: shutterstock.com

Understanding the core values of the destination and its brand, how relevant the brand is to tourists in relevant source markets and how it compares with major competitors



Picture: shutterstock.com

Outline

- ▶ Research team and partner
- ▶ Short introduction of research background and topic
- ▶ **Study series Destination Brand in Germany**
- ▶ Introduction of Destination Brand in other countries



Picture: shutterstock.com

Destination Brand in Germany

Study series in a 3-year-circle



Brand value



Theme competence



Image / Profiles



Source: TIRC Network GmbH /
Institut für Management und Tourismus (IMT)

Methodology and special features

- ▶ **Online-survey**; quota sample (sample size per destination: 1,000)
- ▶ **Representative** of the German-speaking population aged 14 to 74 years and living in private households (projection possible)
- ▶ Wide **destination pool** (more than 100 destinations per study)
- ▶ **Same survey** design over the years (comparative)



Pictures: shutterstock.com

Destination Brand / study content

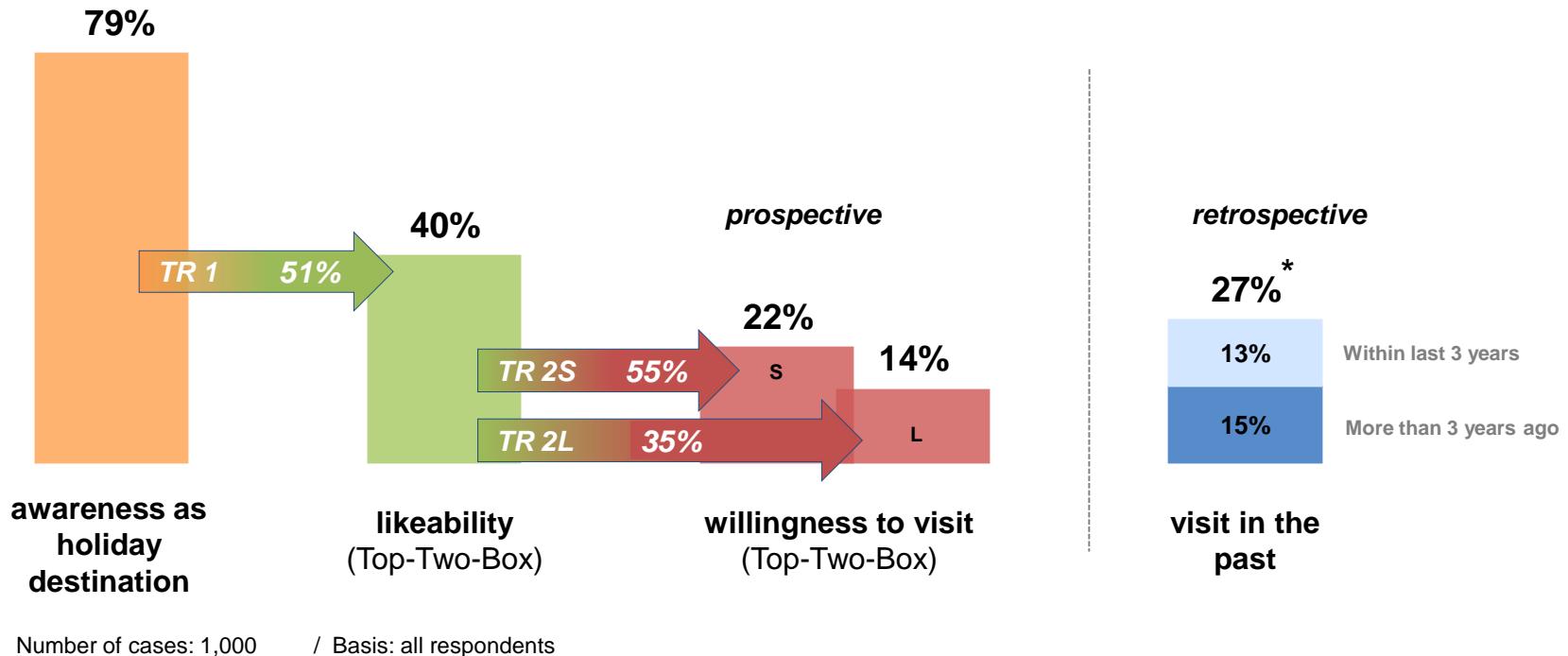


Brand value



Source: TIRC Network GmbH /
Institut für Management und Tourismus (IMT)

Destination Brand / the method 1st year: Four-dimensional brand analysis *Findings for the Ruhr Area*



* Deviations to the sum of the single values are due to the multiple answer option in terms of the time of the visit in the past.

Source: inspektour GmbH, 2015



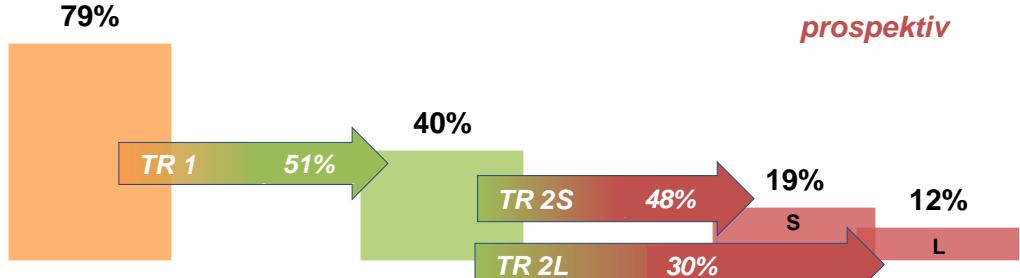
Brand funnel time comparison – Findings for the Ruhr Area

DESTINATION BRAND 15



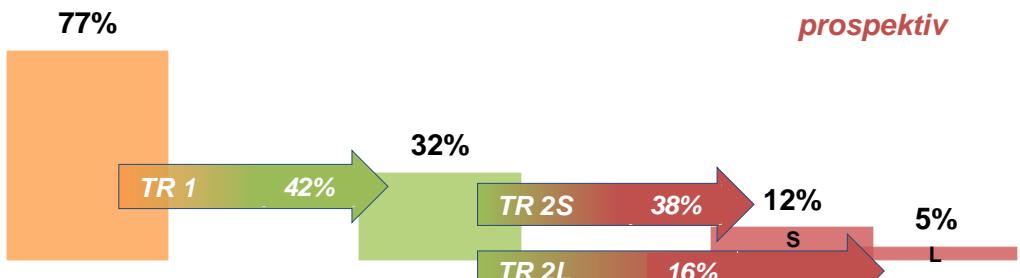
prospektiv

DESTINATION BRAND 12



prospektiv

DESTINATION BRAND 09



prospektiv

Awareness as
holiday
destination

Likeability
(Top-Two-Box)

Willingness to visit
(Top-Two-Box)

Number of respondents: n = at least 1,000 / Basis: all respondents

Source: Institut für Management und Tourismus (IMT), 2009 / 2012; inspektour GmbH, 2015

Plus comparison of results with more than 100 destinations (benchmarks)

Plus socio demographic details



Destination Brand / study content



Themes = types of
holidays / activities

Brand value



Theme competence



Source: TIRC Network GmbH /
Institut für Management und Tourismus (IMT)

Destination Brand / the method 2nd year: Central research questions



General interest in different types of holidays / activities

Perceived core competences (types of holidays / activities)

Competitor analysis (benchmark)

Source: Institut für Management und Tourismus (IMT)

Pictures: shutterstock.com

Example findings for the Ruhr Area

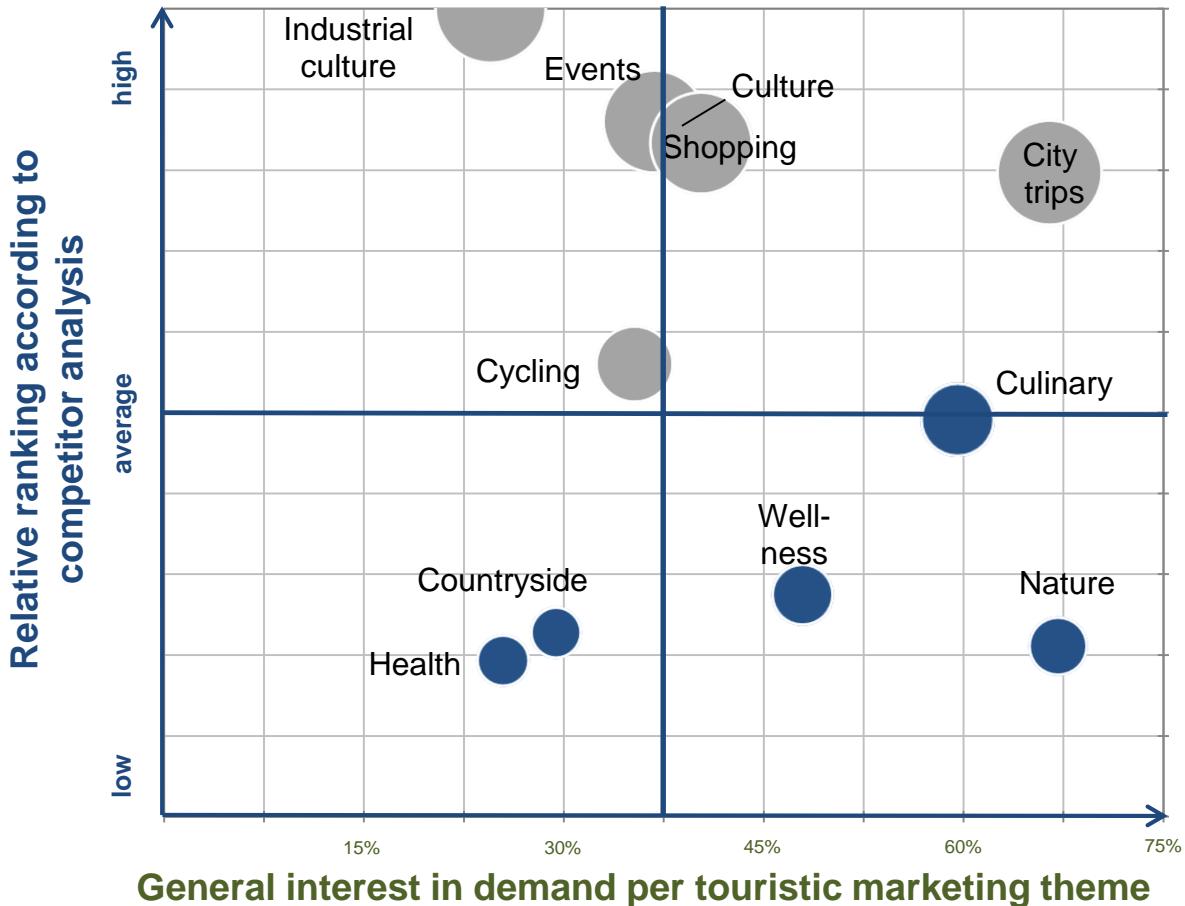
Overview of three-dimensional analysis Ruhr Area

> Category for relative ranking according to competitor analysis: all destinations analysed (up to 172 competitors)

Ruhr Area

Basis: All respondents

Number of respondents: 1,000



Picture: shutterstock.com

Note:

- Size of theme circles = Aided theme competence Ruhr Area
- Last survey period taken into consideration in November / December 2016

Source: Inspektour GmbH 2016

General interest in demand per touristic marketing theme



Destination Brand / study content



Brand value



Theme competence



Image / Profiles



Source: TIRC Network GmbH /
Institut für Management und Tourismus (IMT)

How do Destination Manager make use of the data?

Monitoring of image over-time

Support in stakeholder discussions

Definition of marketing tools and projects (for example for EU funding)

07 STRATEGISCHE AUSRICHTUNG: THEMEN. ZIELGRUPPEN. QUELLMÄRKTE.

Zielgruppen

Die Festlegung der Zielgruppen erfolgt in enger Abschaltung mit dem Tourismus NRW e.V., dem Masterplan Tourismus NRW und im Abgleich mit der empirischen Untersuchung des IMT:



Gut gebildete Best Ager

Alter der Befragten:
48–74 Jahre

Schulbildung:
Abitur, Fachhochschule/
Staatsexamen



Junge Leute
(Singles/Paare ohne Kinder)

Alter der Befragten:
unter 35 Jahren

Haushaltsgroße:
1 bis 2 Personen
keine Kinder im Haushalt
lebend



Neue Familii

Alter der Befragten:
26–55 Jahre
Haushaltseinkommen:
ab 1.500 €
mind. 1 Kind unter
18 Jahren im Haushalt lebend

Strategic management

Die Analyse der Themeneignung und der Zielgruppen lässt sich wie folgt darstellen:

Abgleich Zielgruppen²

Themenportfolio Rahmenübersicht	Themenkategorie	RTG Zielgruppen			NRW Zielgruppen			
		Gut gebildete Best Ager	Junge Leute	Neue Familii	Single & Paare	Ehe Paare	Wohl- habende Best Ager	Haushalt mit mind. 1 Kind unter 18 Jahren
Industriekultur	Profiliertethema	↑	↑	↑	↑	↑	↑	↑
Events		↑	↑	↑	↑	↑	↑	↑
Städtereise	Auffällungsthemen	↑	↑	↑	↑	↑	↑	↑
Shopping		↑	→	↑	↑	↑	↑	↑
Kultur		↑	→	↑	↑	↑	↑	↑
Radfahren		→	↓	↑	↑	↑	↑	↑
Kulinarik	Ergänzungsthemen	→	↓	→	↑	↑	↑	↑
Natur		↓	↓	↓	↓	↓	↓	↓
Wellness	Kein ausreichender Potenzialnachweis	↓	↓	↓	↓	↓	↓	↓
Gesundheit		↓	↓	↓	↓	↓	↓	↓

² Quelle: Institut für Management und Tourismus (IMT), 2013

Outline

- ▶ Research team and partner
- ▶ Short introduction of research background and topic
- ▶ Study series Destination Brand in Germany
- ▶ **Introduction of Destination Brand in other countries**



Picture: shutterstock.com

Closing data gaps with Destination Brand

- ▶ Lack of detailed, representative data on the perception of regional / city destinations
 - in **domestic holiday contexts** in several countries (e.g. attributed types of holidays to Bern from the Swiss perspective)
 - in **international contexts** (e.g. awareness of the Black Forest as a holiday destination in China)
- ▶ Generally:
 - lack of research over time
 - lack of competitive research / benchmarking

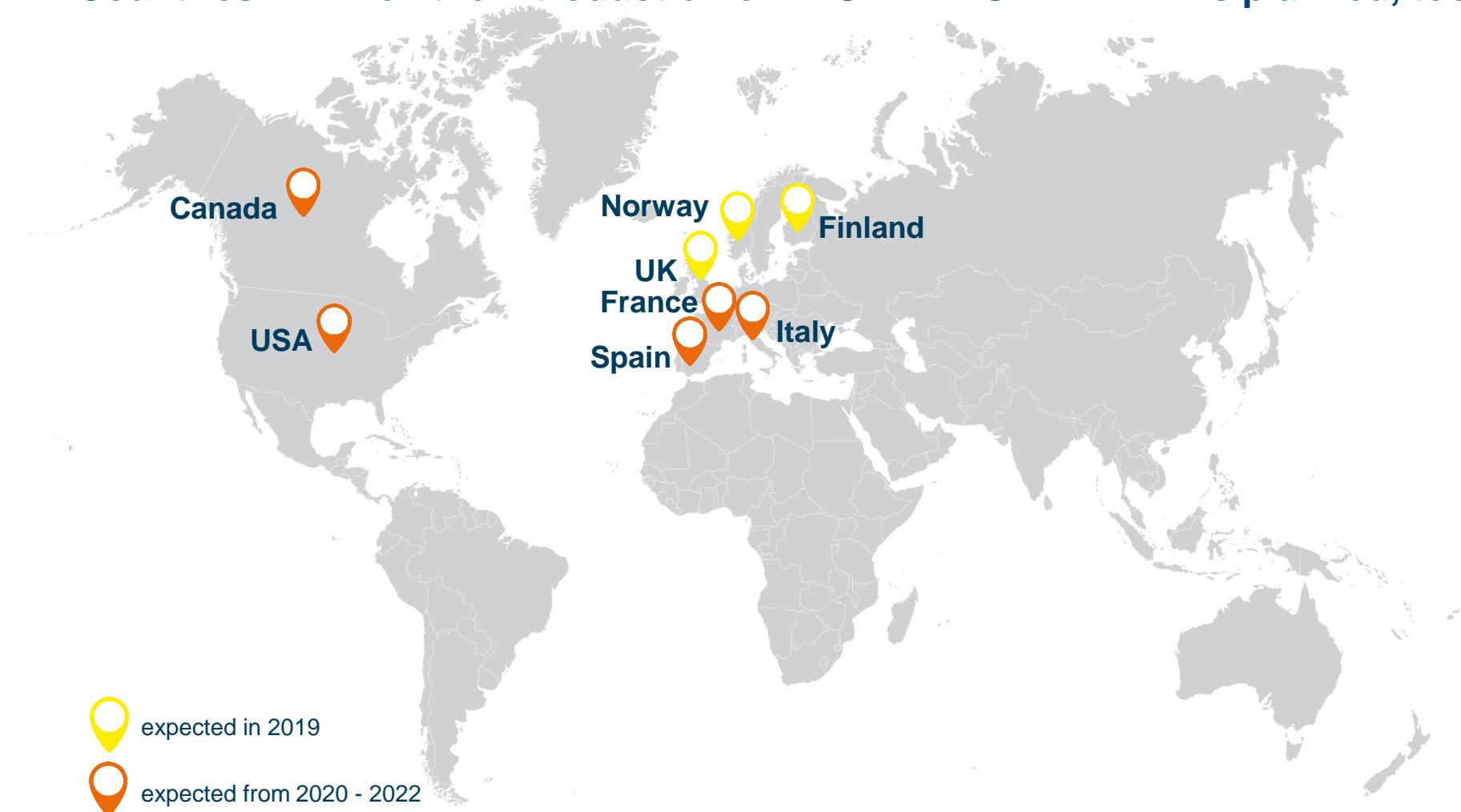
We start with DESTINATION BRAND in 4 source markets



Source map: www.shutterstock.com

Source: inspektour international GmbH /
Institut für Management und Tourismus (IMT)

Countries in which the introduction of DESTINATION BRAND is planned, too:



DOMESTIC evaluation and comparison possibilities in 2018

DESTINATION BRAND country					Survey takes place in	
						
	X					
		X				
					Austrian population will be asked to evaluate the brand value / theme competence of Austrian tourist destinations	
						X
						

Additional evaluation options on an INTERNATIONAL scale



Picture: shutterstock.com

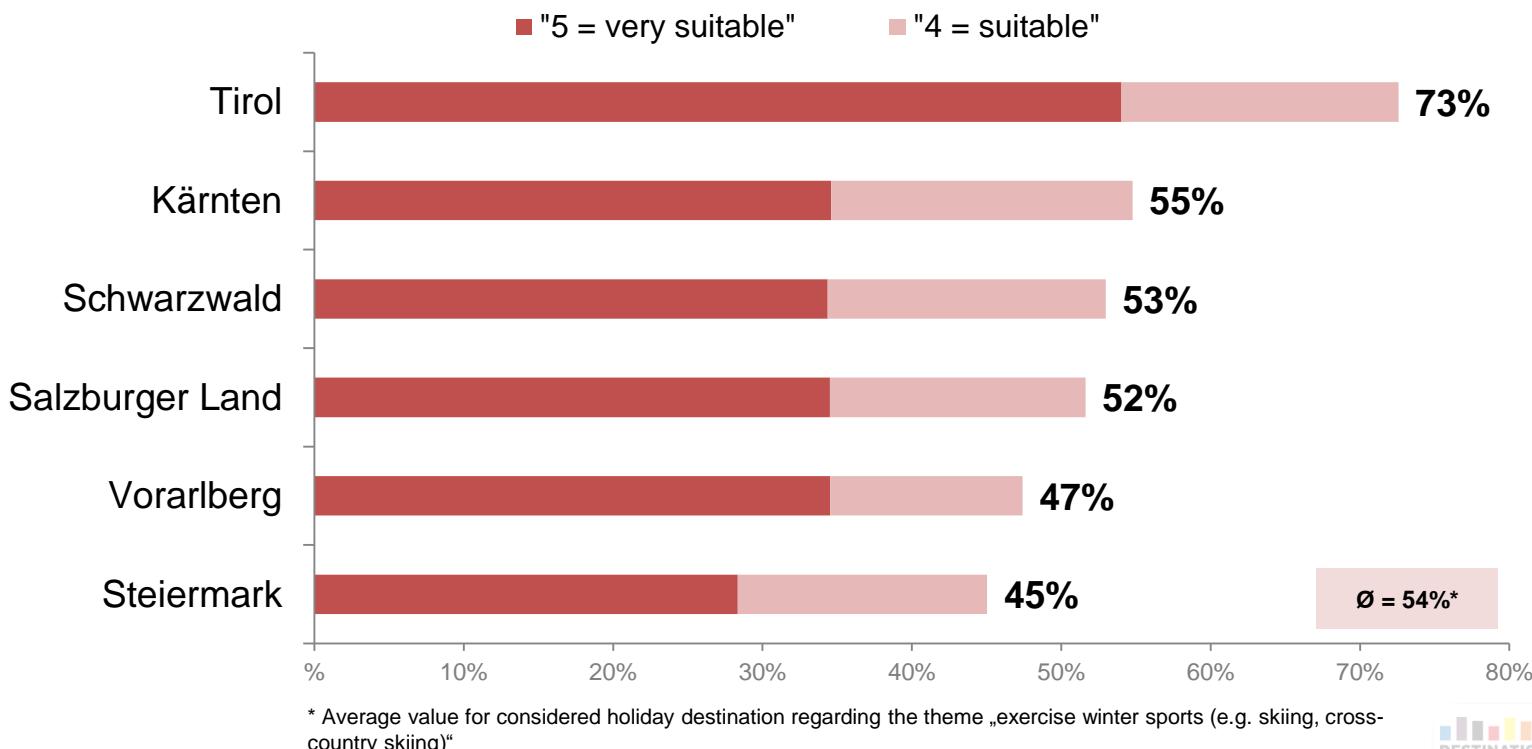
INTERNATIONAL evaluation and comparison possibilities in 2018

DESTINATION BRAND countries Survey <u>takes place in:</u>					
<u>Survey about:</u> Tourist destinations of	Germany	Austria	Switzerland	China	Netherlands
		X	X	X	X
	X			X	X
				X	
				X	X
	X	X	X	X	

German population will be asked to evaluate the brand value / theme competence of **DOMESTIC and INTERNATIONAL tourist destinations**

Example for a DOMESTIC and INTERNATIONAL comparison of research findings

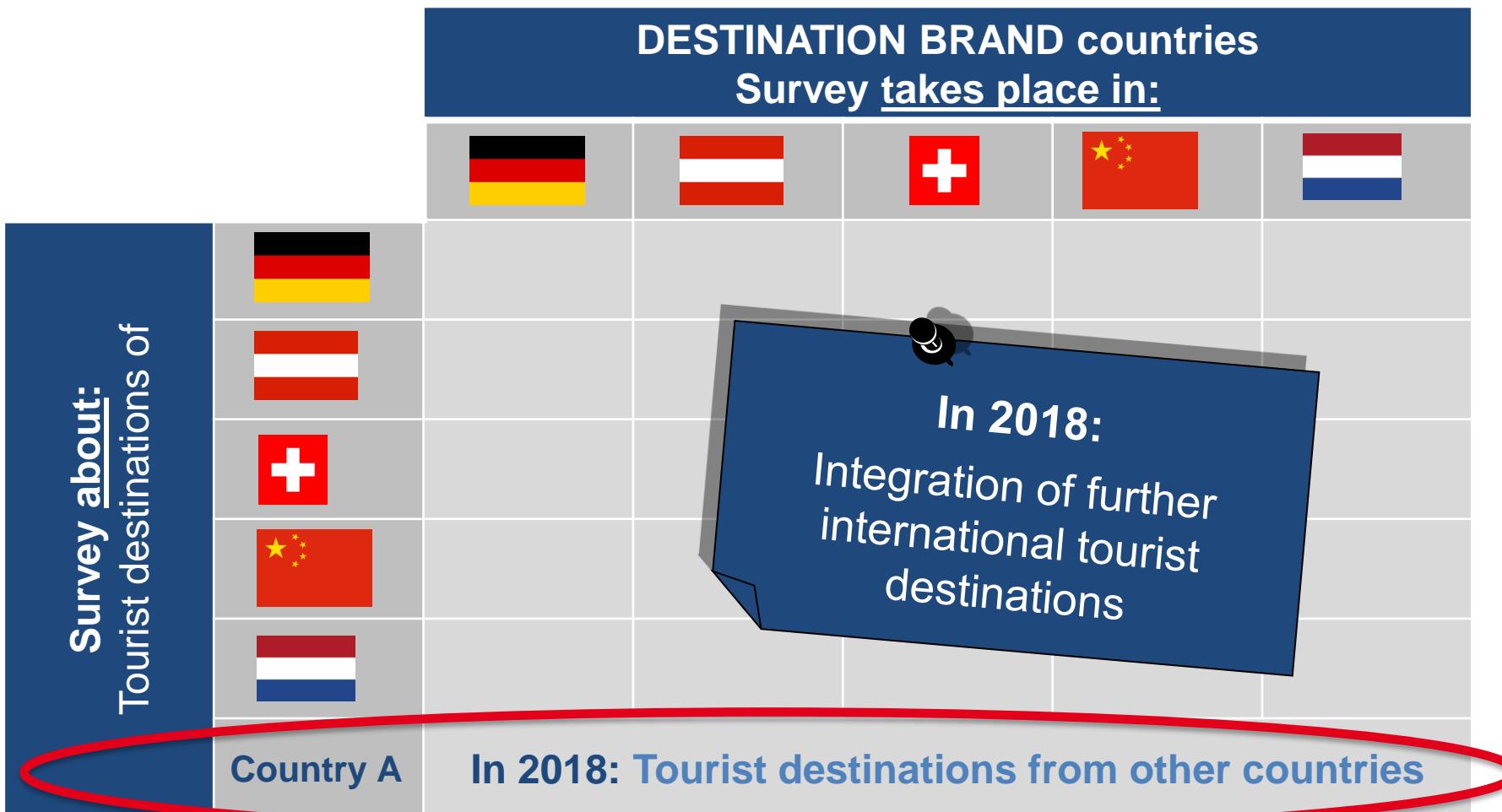
- Theme competence of Austrian destinations and the Black Forest from the perspective of the German population for the theme “Exercise winter sports (e.g. skiing, cross-country skiing)”



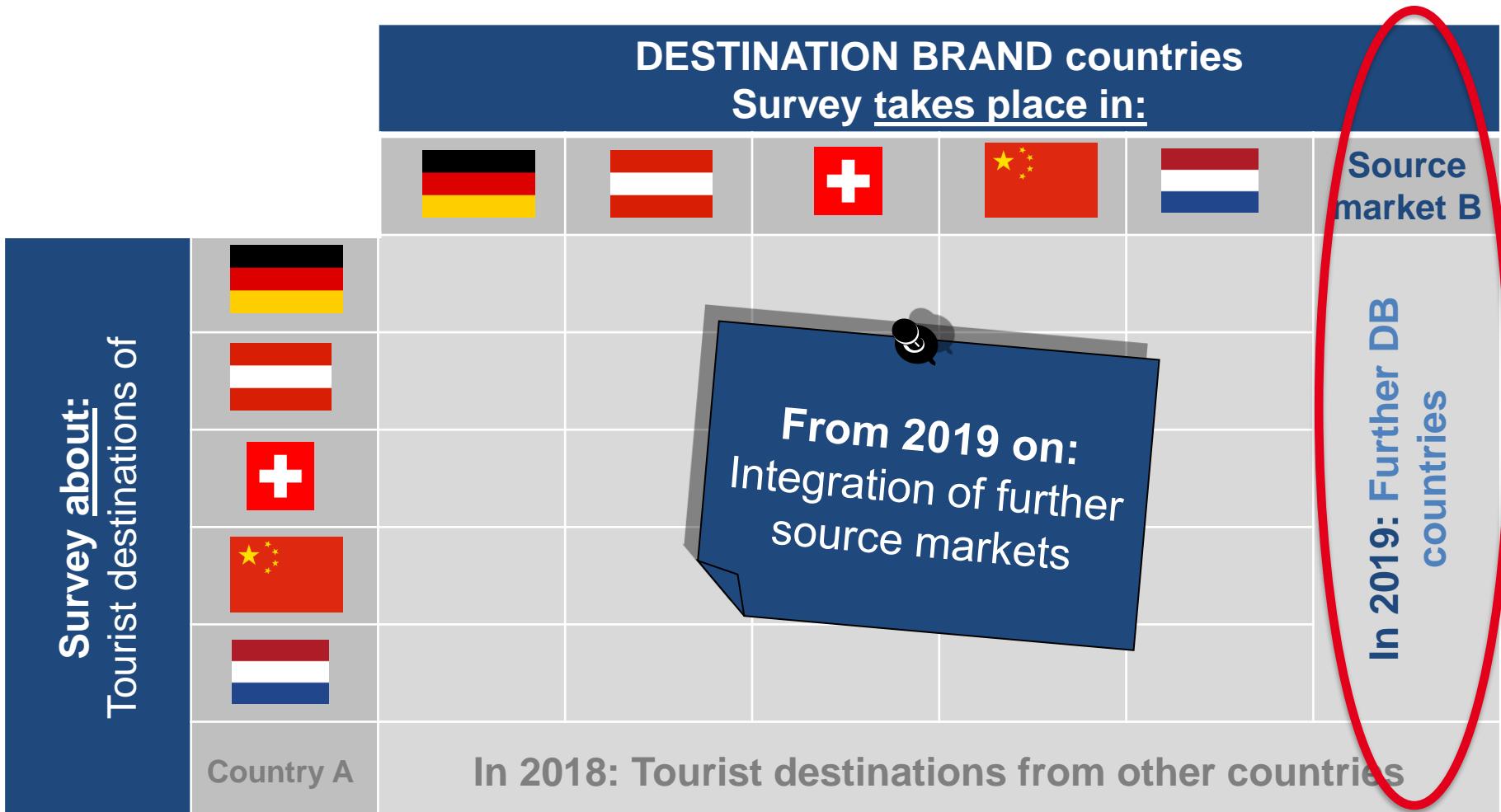
Source: Institut für Management und Tourismus (IMT), 2013



INTERNATIONAL evaluation and comparison possibilities in 2018



INTERNATIONAL evaluation and comparison possibilities in 2018



DESTINATION BRAND 2018 | summary

Data on:
(national and international scale)



Brand value

or



or



Brand value

+



Theme competence

and:

BENCHMARK / competitor analysis

**DOMESTIC &
INTERNATIONAL
scale**

Market position

from:



and /
or



and /
or



and /
or



and /
or



Time schedule and further information on the upcoming study in 2018:

Time schedule	
Registration:	From May to end of August 2018
Field work:	October / November 2018
Delivery of results:	From 1 st of March 2019
Further conditions	
Results are delivered:	<ul style="list-style-type: none">• By E-Mail• Individual report for each participating destination



Time schedule and further information on the upcoming study in 2018:

	DESTINATION BRAND				
Survey <u>in</u>	Germany	Austria	China	Netherlands	Switzerland
Survey <u>about</u>	net price per destination per source market				
Brand value	3.500,- EUR				3.900,- EUR
Theme competence	3.500,- EUR				3.900,- EUR

Questions?

- ▶ Please feel free to talk to us **directly after the presentation**
- ▶ Back home: Please **contact us per E-Mail or telephone** at any time
- ▶ Let's meet again – We would be glad to organise an **information event** to present DESTINATION BRAND **in your home country**





Thank you for listening!

Picture: shutterstock.com

For more information go to: www.destination-brand.com



How does your tourism destination stand out?
Get data on the perception of your destination in relevant source markets

shutterstock.com



www.destination-brand.com

For further reading on the theory...

- ▶ Burmann, C.; Halaszovich, T.; Schade, M.; Hemmann, F. (2015): Identitätsbasierte Markenführung. 2. Auflage. Wiesbaden.
- ▶ Eisenstein, B. (2018): Markenführung von Destinationen – Zwischen ökonomischem Nutzen, sozialer Konstruktion und Machbarkeit. In: Zeitschrift für Tourismuswissenschaft 01/18, in print.
- ▶ Eisenstein, B.; Koch, A.; Trimborn, P.; Müller, S. (2017): Die DestinationBrand-Studienreihe. Basisinformationen zur Markenführung von Destinationen. In: Eisenstein, B. (ed.): Marktforschung für Destinationen. Berlin, pp. 267–283.
- ▶ Eisenstein, B.; Koch, A. (2011): Customer-oriented Brand Value Assessment of the German Source Market for the Destination South Africa. In: Eilzer, C.; Arlt, W.G.; Eisenstein, B. (eds.): Global experiences in tourism. München pp. 85–100.
- ▶ Hankinson, G. (2012): The measurement of brand orientation, its performance impact, and the role of leadership in the context of destination branding. In: Journal of marketing management 28 (7/8), pp. 974–999.
- ▶ Köchling, A.; Eisenstein, B.; Koch, A. (2015): On Theme Marketing of Tourism Organisations. "Destination-Brand"-Analysis of Theme Competence of German Holiday Destinations. In: Lück, M.; Velvin, J.; Eisenstein, B. (eds.): The social side of tourism: Frankfurt am Main, pp. 157–193.
- ▶ Pike, S. (2017): Destination positioning and temporality: Tracking relative strengths and weaknesses over time. In: Journal of Hospitality and Tourism Management 31, pp. 126–133.
- ▶ Pike, S. (2014): Destination Brand Performance Measurement over Time. In: Woodside, A. G.; Kozak, Metin (eds.): Tourists' perceptions and assessments. Bingley, pp. 111–120.
- ▶ Pike, S. (2007): Consumer-Based Brand Equity for Destinations. Practical DMO performance measures. In: Journal of Travel & Tourism Marketing 22 (1), pp. 51–61.
- ▶ Pike S. / Page S. J. (2014) Destination Marketing Organizations and destination Marketing: a narrative analysis of the literature. In: Tourism Management. Volume 41. pp 202-227.
- ▶ Scherhag, K. (2011): Das Destinationsimage als Basis eines Wettbewerbsvorteils im Destinationsmanagment. In: Gronau, W. (ed.): Zukunftsähiger Tourismus. Mannheim, pp. 187–194.
- ▶ Seeler, S. / Böhling, E. / Eisenstein, B. (2018): Global Destination Brand – An international comparative study. In: Alisha Ali /John S. Hull (eds.): Multi-stakeholder Perspectives of the Tourism Experience. Responses from the International Competence Network of Tourism Research and Education (ICNT). pp 179-197, in print.
- ▶ Thilo, I. (2017): Identitätsorientierte Markenführung im Tourismus. Entwicklung eines internen Markenführungsmodells für Destinationen. Wiesbaden.