

Schladming-Dachstein Vienna Salzburger Land Austria Argentina Lower Saxony Kassel
Trentino Dachstein Vorarlberg Schladming Colombia South America Mexico
Chiemsee - Chiemgau Carinthia Chile North Rhine-Westphalia SPO Düsseldorf Darmstadt
Germany South Tirol Tirol Eifel Upper Austria Hamburg Holstein Switzerland Black Forest
Luxembourg Flanders Styria Burgenland New Zealand Rügen Island Lower Austria Hesse
Italy France Greece Munich Upper Lusatia South Africa City of Otto St. Peter-Ording Taunus
Spain Croatia London Paris Berlin Baden-Württemberg Bavaria Ruhr Valley Usedom Island
Budapest Dubrovnik Texel Norderney Sauerland Mecklenburg Lake District Rhineland-Palatinate
Prague Ljubljana Ameland Lusatian Lake District Uckermark Schleswig-Holstein Saxony
Peru Bratislava Kingdom of Fife Swabian Alp Thuringia Magdeburg Stuttgart

DESTINATION BRAND 18

First selected results

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7th March 2019 | 3-4 p.m.

VIP 1 (Großer Stern | Level 4) | ITB Berlin 2019

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Outline

- ▶ DESTINATION BRAND 18: Methodological key facts
- ▶ Selected results “Brand value”
- ▶ Selected results “Theme competence”
- ▶ Further data analyses options
- ▶ Outlook 2019 / 2020

Outline

- ▶ DESTINATION BRAND 18: Methodological key facts
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- ▶ Selected results “Theme competence”
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DESTINATION BRAND 18 | Methodological key facts

Study series
in a 3-year-circle,
annually changing
research focus

10 years
DESTINATION BRAND
in Germany



Brand value

DESTINATION BRAND
09 | 12 | 15



Theme competence

DESTINATION BRAND
10 | 13 | 16



Image / Profile

DESTINATION BRAND
11 | 14 | 17



DESTINATION BRAND 18 | Methodological key facts

Online survey
in DE, AT, CH and NL

Field work:
Nov 2018

Representative of the local
population aged between
14 to 74 years



DESTINATION BRAND 18 | Methodological key facts

Respondents in total:

12,000

Considered
holiday
activities: 33

Considered destinations
in total: 76



DESTINATION BRAND 18 | Methodological key facts



Academic partner NL:



Stenden



Industry partners:

SACHSEN. LAND VON WELT.



DESTINATION BRAND 18 | Methodological key facts

Customer-oriented perception
of destination brands

Theme competence

Three-dimensional competitor analysis

Brand value

Four-dimensional brand funnel

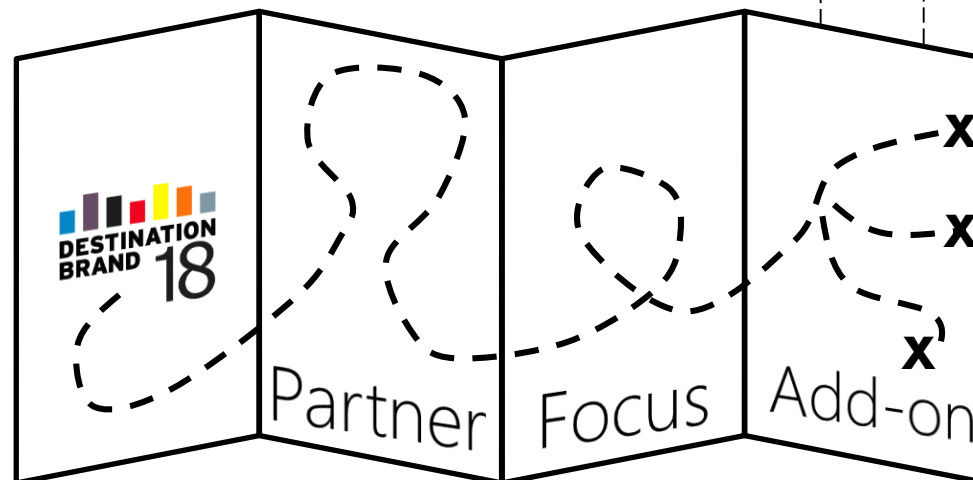


DESTINATION BRAND 18 | Methodological key facts

GNTB:

Evaluation of the travel destination image of Germany in comparison to three main competitors

Importance of 14 sustainability aspects



Outline





- ▶ DESTINATION BRAND 18: Methodological key facts
- ▶ Selected results “Brand value”
 - ▶ Supported and unsupported brand awareness
 - ▶ Brand funnel (example Black Forest)
- ▶ Selected results “Theme competence”
- ▶ Further data analyses options
- ▶ Outlook 2019 / 2020

Unsupported awareness as a foreign tourist destination – Top 10 destinations in Source Markets: DE, AT, CH, NL

Which **foreign** tourist destinations spring to mind when thinking about a holiday trip with at least one overnight stay?
Tourist destinations can be cities, regions, countries, etc. Please name a maximum of 5 tourist destinations.



Base: All respondents with valid responses

 Respondents: 1,864 Responses: 5,435	% of respondents*	 Respondents: 1,949 Responses: 6,389	% of respondents*
1 Spain	23.3%	1 Italy	34.0%
2 Italy	23.0%	2 Croatia	26.2%
3 Austria	14.4%	3 Germany	16.4%
4 France	13.6%	4 Spain	12.9%
5 Netherlands	9.3%	5 Greece	11.6%
6 Greece	8.7%	6 London	8.3%
7 USA	8.2%	7 Hungary	8.0%
8 Turkey	7.8%	8 France	6.2%
9 Mallorca	7.7%	9 Turkey	5.8%
10 London	7.2%	10 Paris	5.6%
 Respondents: 2,949 Responses: 9,993	% of respondents*	 Respondents: 2,688 Responses: 8,187	% of respondents*
1 Italy	26.0%	1 Germany	26.1%
2 Germany	17.1%	2 Spain	19.5%
3 France	16.6%	3 France	19.4%
4 Spain	15.8%	4 Italy	14.2%
5 Paris	10.7%	5 Belgium	13.8%
6 London	9.2%	6 Paris	11.6%
7 Austria	8.2%	7 London	11.1%
8 Berlin	6.5%	8 Greece	8.3%
9 USA	6.1%	9 Austria	7.7%
10 Greece	6.0%	10 Berlin	6.6%

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

* Multiple responses possible.

Unsupported awareness as a tourist destination within Germany

– Top 10 competitor analysis | Source Markets: AT, CH, NL

Which tourist destinations within Germany spring to mind when thinking about a holiday trip with at least one overnight stay? Tourist destinations can be cities, regions, federal states, etc. Please name a maximum of 5 tourist destinations.

Base: All respondents with valid responses



Austria			Switzerland			Netherlands		
Respondents: 1,754 Responses: 4,686			Respondents: 2,719 Responses: 7,073			Respondents: 2,273 Responses: 5,053		
		% of respondents*			% of respondents*			% of respondents*
1	Berlin	50.6%	1	Berlin	57.7%	1	Berlin	47.6%
2	Munich	50.2%	2	Munich	39.9%	2	Cologne	18.6%
3	Hamburg	40.1%	3	Hamburg	31.6%	3	Munich	17.6%
4	Cologne	14.8%	4	Cologne	13.4%	4	Düsseldorf	13.3%
5	Bavaria	10.0%	5	Black Forest	11.5%	5	Hamburg	11.0%
6	Frankfurt	7.4%	6	Stuttgart	11.1%	6	Black Forest	10.8%
7	Dresden	6.9%	7	Europa-Park Rust / Rust	9.9%	7	Eifel	9.9%
8	Nuremberg	5.5%	8	Frankfurt	8.2%	8	Bavaria	6.7%
9	Baltic Sea / Baltic Sea Coast	4.8%	9	Freiburg	6.4%	9	Winterberg	6.2%
10	Stuttgart	4.7%	10	Dresden	5.4%	10	Sauerland	6.0%
14	Black Forest	2.6%						

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

Which tourist destinations within Austria spring to mind when thinking about a holiday trip with at least one overnight stay?
Tourist destinations can be cities, regions, federal states, etc. Please name a maximum of 5 tourist destinations.

Base: All respondents with valid responses



 Unsupported awareness as a tourist destination within Austria Respondents: 1,481; Responses: 3,004		% of respondents*
1	Vienna	64.2%
2	Salzburg	29.8%
3	Tirol	21.9%
4	Carinthia	13.0%
5	Innsbruck	9.9%
6	Graz	7.1%
7	Styria	4.7%
8	Linz	3.8%
9	Zillertal	2.7%
10	Kitzbühel	2.5%

► **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

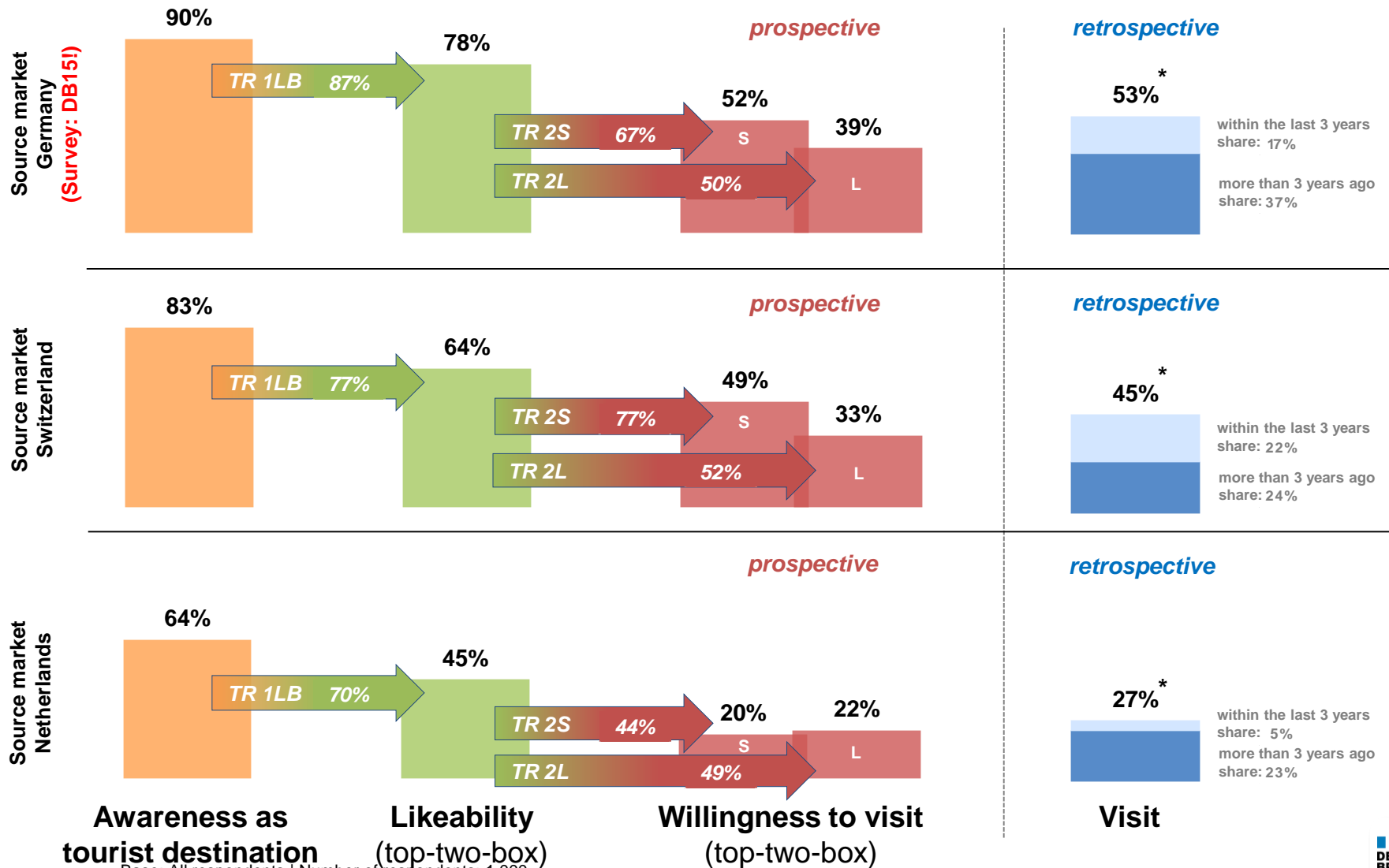
* Multiple responses possible.



Four dimensional brand analysis I

Example for the destination “Black Forest”

(SM DE: Schwarzwald; SM CH: Schwarzwald / Forêt Noire; SM NL: Zwartewoud)



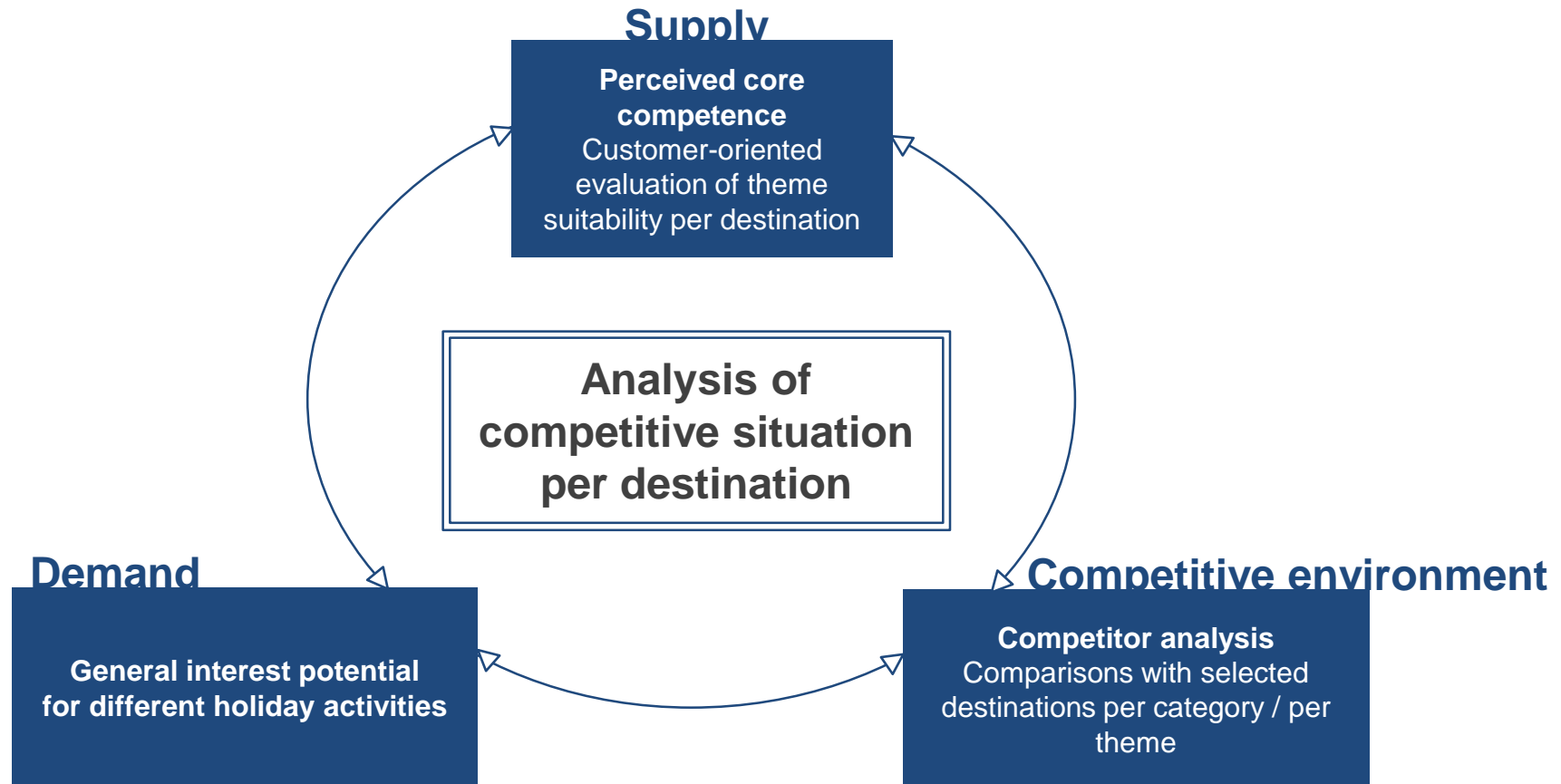
Source: inspektour (international) GmbH / IMT of the FH Westküste, 2015 / 2018

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

Outline

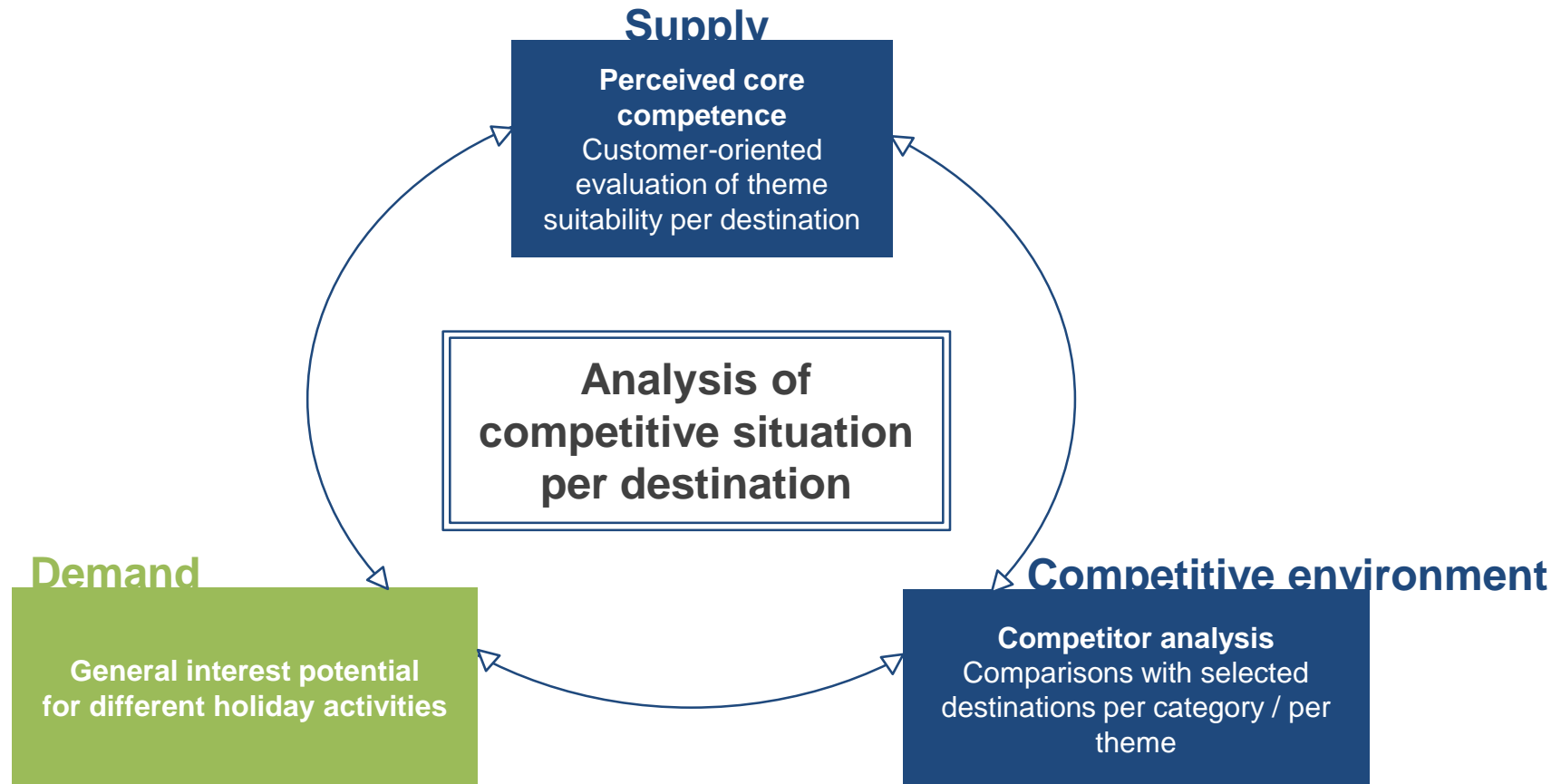
- ▶ DESTINATION BRAND 18: Methodological key facts
- ▶ Selected results “Brand value”
- ▶ Selected results “Theme competence”
 - ▶ General interest in holiday activities
 - ▶ Target group analysis / Consumer profile
 - ▶ Supported and unsupported theme competence
- ▶ Further data analyses options
- ▶ Outlook 2019 / 2020

Theme competence I Base: Three-dimensional competitor analysis



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

Theme competence I Base: Three-dimensional competitor analysis



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

Theme competence I Pool of holiday activities

- | | | |
|---------------|-----------------------------------|---------------------------------|
| 1. Culinary | 6. Amusement parks | 20. Luxury |
| 2. Culture | 7. Castles | 21. Motorcycling |
| 3. Nature | 8. Countryside | 22. Mountain biking |
| 4. Sports | 9. Climbing fixed mountain routes | 23. Mountaineering |
| 5. City break | 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. Indigenous peoples | 31. Water sports |
| | 18. Industrial heritage | 32. Wellness |
| | 19. Lively places | 33. Winter sports |



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

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





General interest potential

– Top 10 per source market (DE, AT, CH, NL) / Base: All respondents

Ranking of the considered holiday activities with regard to the general interest potential

Base: All respondents

Top-two-box on a scale from "5 = very interested" to "1 = not at all interested"

<div></div> <div>Respondents: 2,000</div>				<div></div> <div>Respondents: 2,000</div>			<div></div> <div>Respondents: 3,000</div>			<div></div> <div>Respondents: 2,000</div>		
		% of respondents	Projection in millions*		% of respondents	Projection in millions*		% of respondents	Projection in millions*		% of respondents	Projection in millions*
1	Relaxation	75	46.7	Relaxation	77	5.1	Relaxation	78	4.7	Relaxation	76	9.7
2	Nature	68	42.0	Nature	71	4.7	Culinary	73	4.4	City break	62	8.0
3	Swimming / Beach	62	38.6	Swimming / Beach	69	4.6	City break	70	4.2	Nature	55	7.0
4	Culinary	60	37.3	Culinary	68	4.5	Nature	65	3.9	Castles, palaces and cathedrals	51	6.5
5	City breaks	59	36.8	City breaks	65	4.3	Swimming / beach	64	3.9	Swimming / beach	48	6.1
6	Castles, palaces and cathedrals	52	32.2	Wellness	56	3.7	Gardens / parks	53	3.2	Culinary	47	6.0
7	Gardens / parks	49	30.5	Castles, palaces and cathedrals	50	3.3	Culture	50	3.0	Shopping	46	5.9
8	Culture	45	28.1	Gardens / parks	48	3.2	Wellness	49	3.0	Indigenous (native) peoples	44	5.7
9	Wellness	43	26.4	Hiking	47	3.1	Castles, palaces and cathedrals	48	2.9	Culture	43	5.5
10	Hiking	42	26.1	Culture	46	3.0	Lively places	48	2.9	Gardens / parks	39	4.9
							Hiking (rank 13)	44	2.6	Hiking (rank 22)	23	2.5

► Note 1: Last survey taken into consideration in November / December 2018

► Note 2: Short versions of themes, wording in original questionnaire differs.

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

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





General interest potential

– Top 10 per source market (DE, AT, CH, NL) | Base: All respondents

Ranking of the considered holiday activities with regard to the general interest potential

Base: All respondents

Top-two-box on a scale from "5 = very interested" to "1 = not at all interested"

 Respondents: 2,000				 Respondents: 2,000				 Respondents: 3,000				 Respondents: 2,000			
		% of respondents	Projection in millions*		% of respondents	Projection in millions*		% of respondents	Projection in millions*		% of respondents	Projection in millions*			
1	Relaxation	75	46.7	Relaxation	77	5.1	Relaxation	78	4.7	Relaxation	76	9.7			
2	Nature	68	42.0	Nature	71	4.7	Culinary	62	8.0						
3	Swimming / Beach	62	38.6	Swimming / Beach	69	4.6	City break								
4	Culinary	60	37.3	Culinary	68	4.5	Nature								
5	City breaks	59	36.8	City breaks	65	4.3	Swimming / beach	64	3.9	Swimming / beach	63	3.8			
6	Castles, palaces and cathedrals	52	32.2	Wellness	56	3.7	Gardens / parks	53	3.2	Culinary	47	6.0			
7	Gardens / parks	49	30.5	Castles, palaces and cathedrals	53	3.3	Culture	50	3.0	Shopping	46	5.9			
8	Culture	47	29.1	Gardens / parks	52	3.2	Wellness	49	3.0	Indigenous (native) peoples	44	5.7			
9	Wellness	43	26.4	Hiking	47	3.1	Castles and cathedrals	49	3.0	Culture	45	5.5			
10	Hiking	42	26.1	Culture	46	3.0	Lively places	48	2.9	Gardens / parks	39	4.9			
							Hiking (rank 13)	44	2.6	Hiking (rank 22)	23	2.5			

Additional question on main travel motives among holiday activities

32%
(8th Rank)

34%
(8th Rank)

31%
(12th Rank)

14%
(22nd Rank)

► Note 1: Last survey taken into consideration in November / December 2018

► Note 2: Short versions of themes, wording in original questionnaire differs.

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

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

General interest potential I

Stereotype analysis of respondents with interest in “hiking” in DE, AT, CH and NL

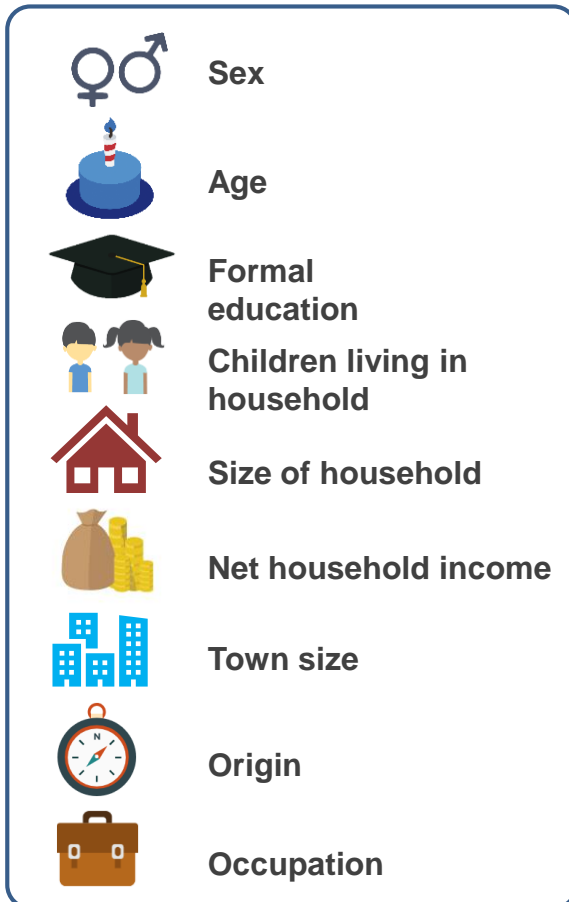


Question

What are the **main characteristics** of those who are interested in the holiday activity “hiking”?









Analysis of stereotypes



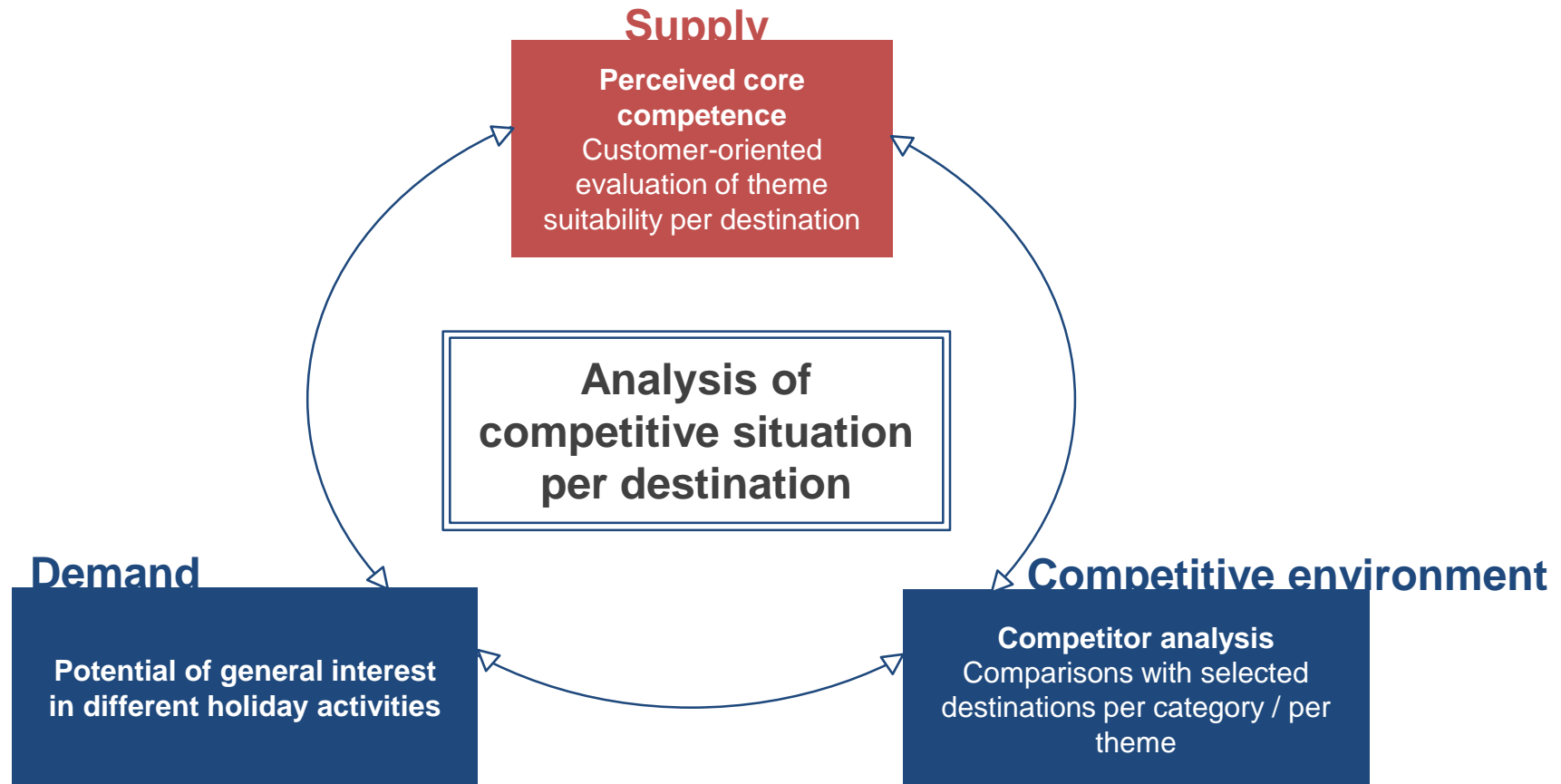
Source: inspektour (international) GmbH / IMT of the FH Westküste, 2018

General interest potential

Stereotype analysis of respondents with general interest in “hiking” | SM: DE, AT and CH

	Criterion	DE	AT	CH
	Age		“55-64 years-old” (112)	“35-44 years-old” (111) “65-74-years-old” (110)
	Formal education	University degree (117)	University degree (115)	
	Children living in household	Children under 14 years (112)	≥ 2 children under 14 years (115)	≥ 2 children under 14 years (113)
	Net household income	High / very high income (118)		
	Origin	Nielsen area 7 (Sachsen, Thuringia) (110)	Tirol (114) Styria (116)	
	Occupation	Students (112) Skilled labour (115) Employees in management position (116)	Skilled labour (110)	Self-employed (122)

Theme competence I Base: Three-dimensional competitor analysis



Theme competence I Pool of holiday activities

General themes

(examined for all destinations)

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



Specific themes

(individual selection of 5 themes per destination)

- | | |
|-----------------------------------|---------------------------------|
| 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. Indigenous peoples | 31. Water sports |
| 18. Industrial heritage | 32. Wellness* |
| 19. Lively places | 33. Winter sports** |

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

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

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)?

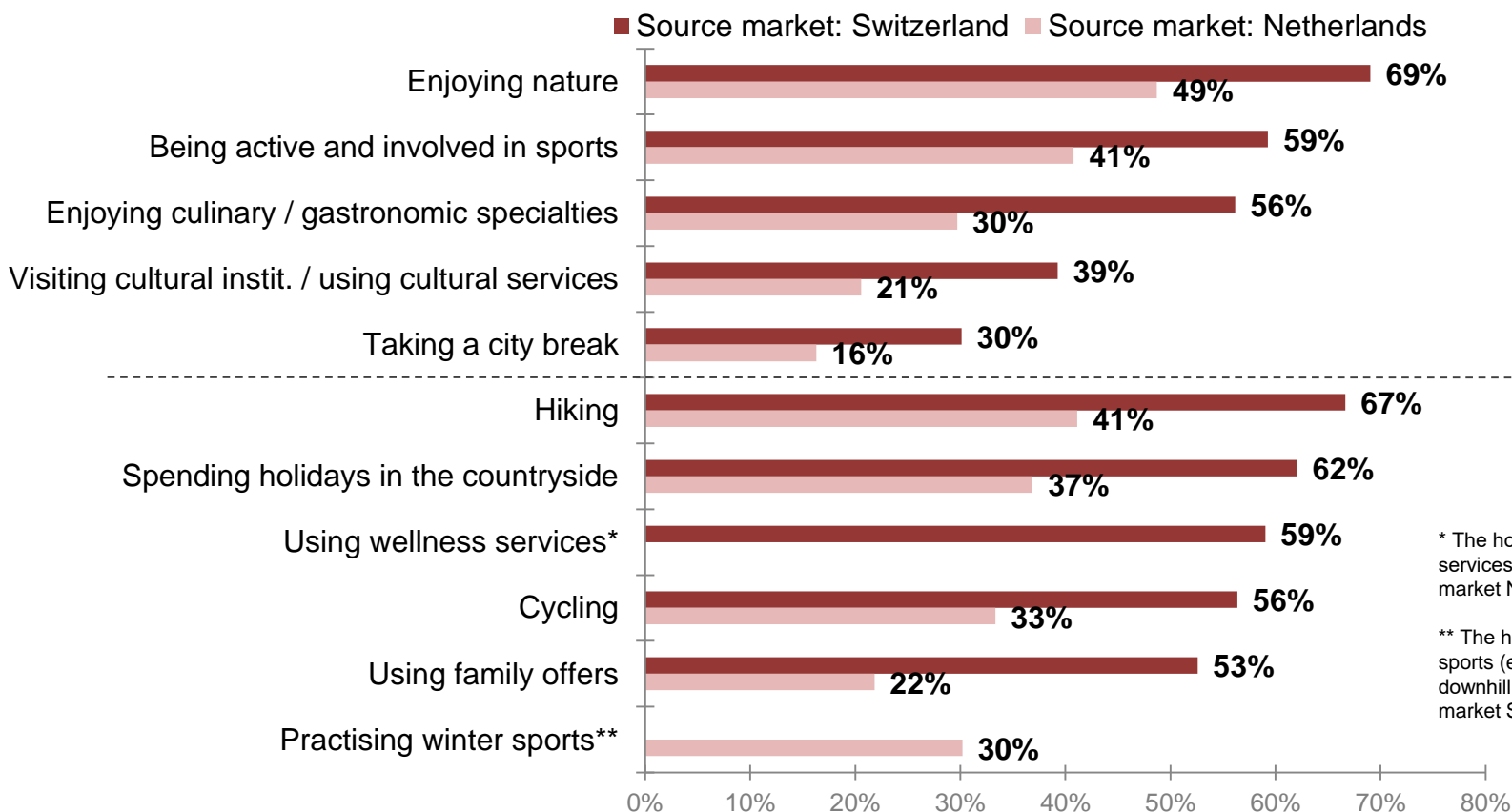
> Top-two-box on a scale from “5 = very suitable” to “1 = not at all suitable” (in % of respondents)

■ *Black Forest*

Source market: Comparison CH, NL

Base: All respondents

Number of respondents: 1,000



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

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)?

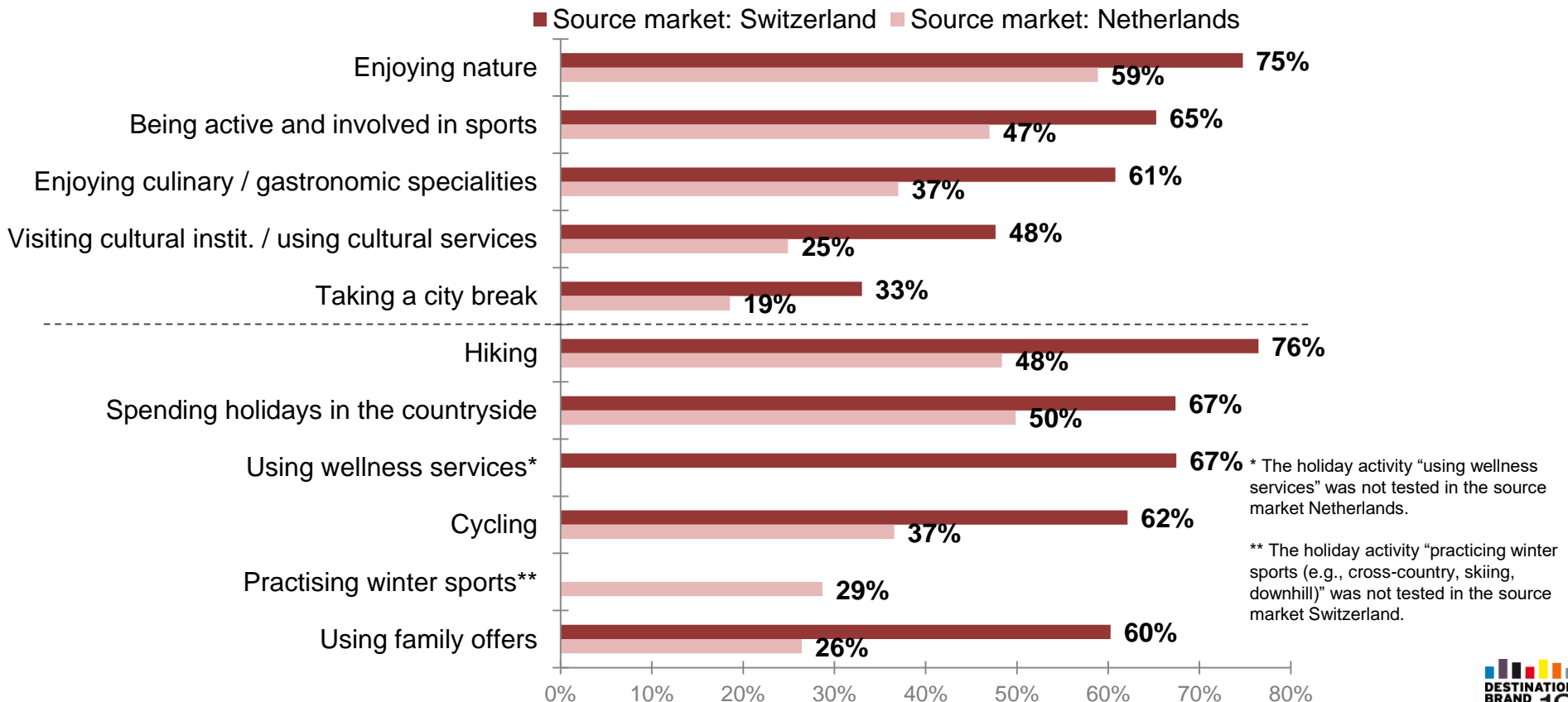
> Top-two-box on a scale from “5 = very suitable” to “1 = not at all suitable” (in % of respondents)

■ Black Forest

Source market: Comparison CH, NL

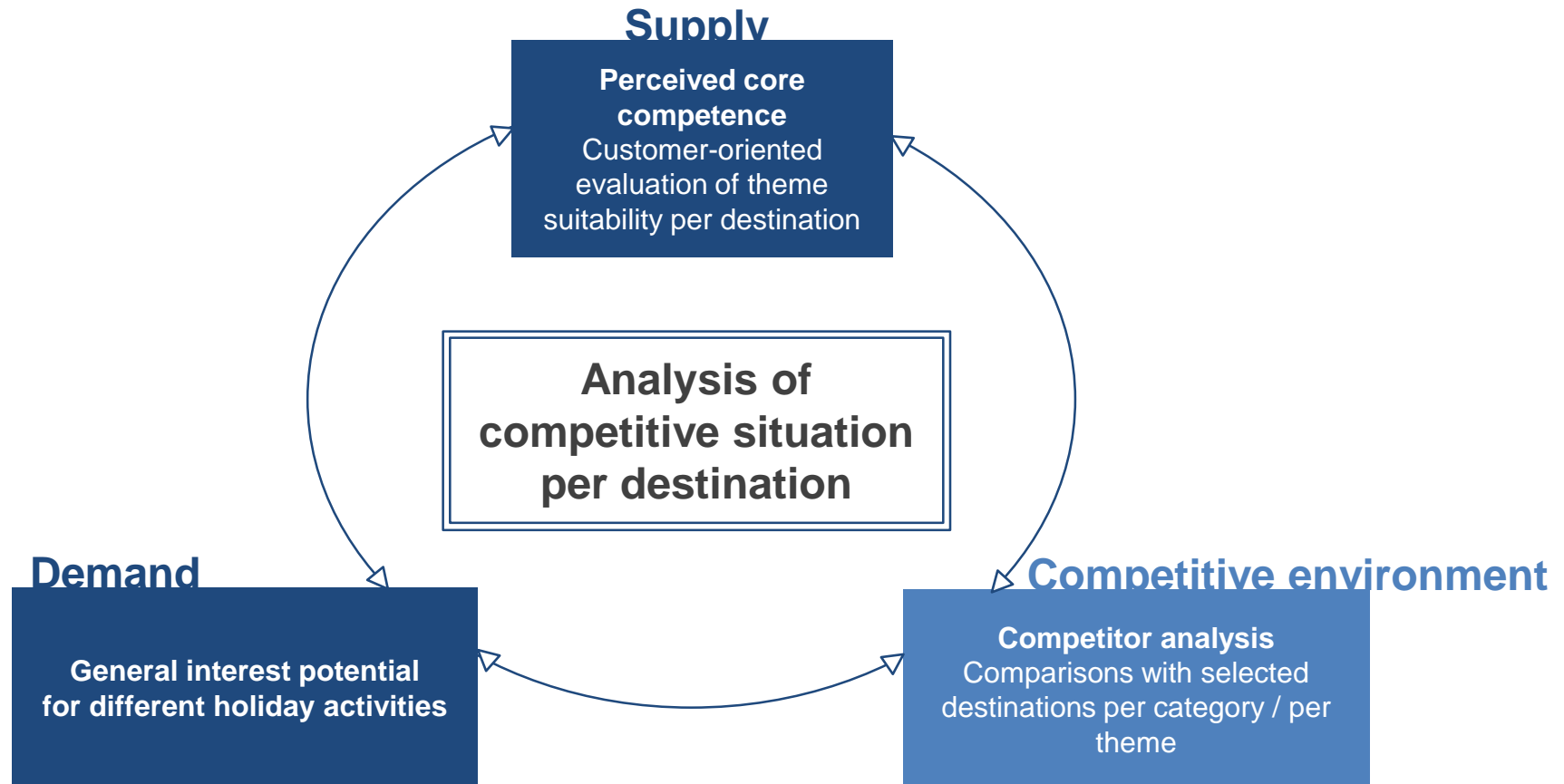
Base: All respondents with interest in theme

Number of respondents: min. 191



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

Theme competence I Base: Three-dimensional competitor analysis





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



Unsupported theme competence (Top of Mind) “Culture” – Competitor analysis Top 10 destinations

Please imagine that you intend to **go on a cultural journey / holiday**. Which **foreign** tourist destinations (countries, cities, regions etc.) do you consider particularly suitable for this purpose? (max. 3 responses)

Base: All respondents with valid responses



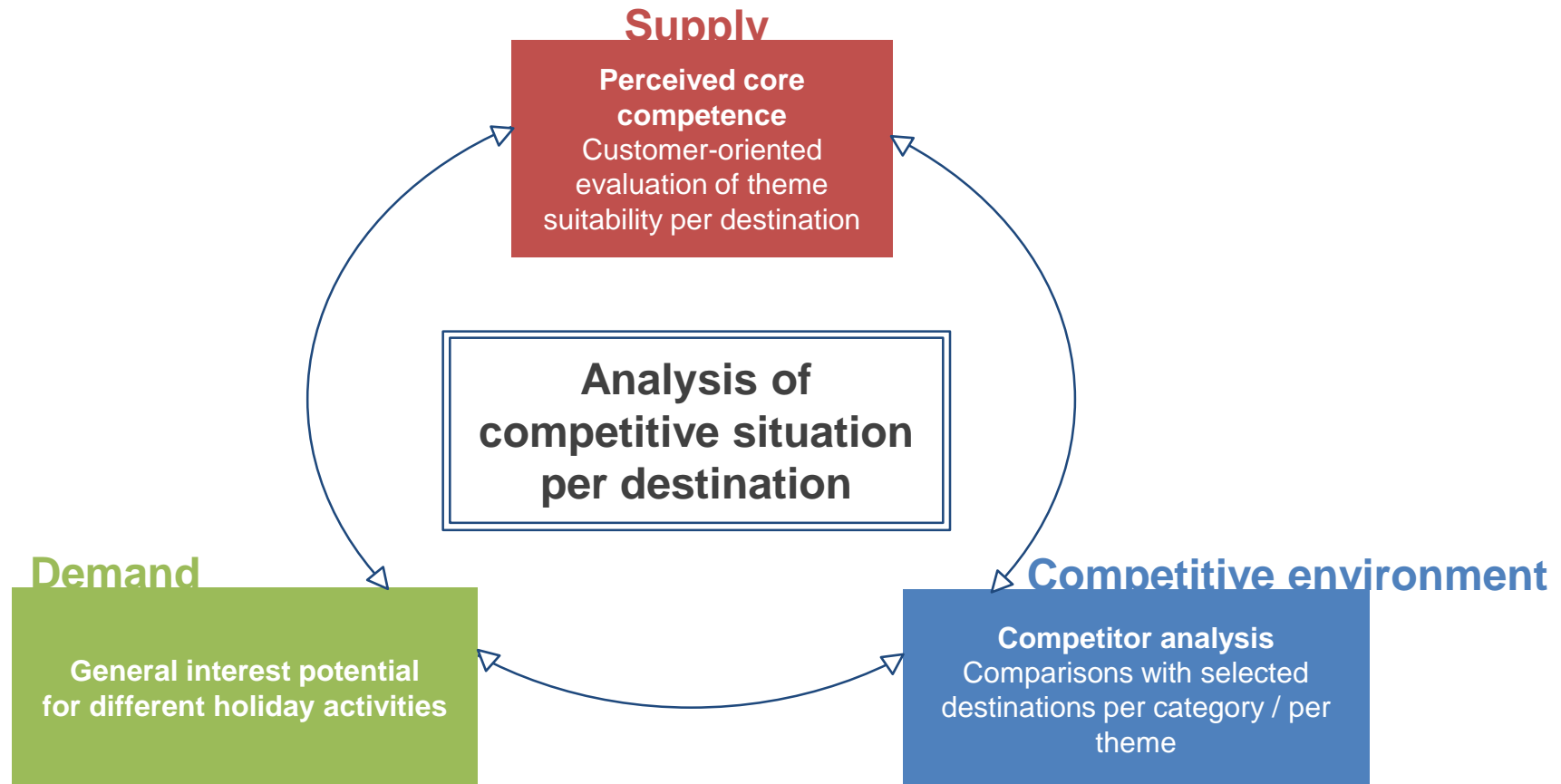
	Respondents: 540 Responses: 1,207	% of respondents*		Respondents: 687 Responses: 1,651	% of respondents*
1	Italy	21.5%	1	Italy	22.6%
2	France	11.7%	2	Rome	14.8%
3	Spain	10.7%	3	Spain	13.1%
4	Rome	10.0%	4	Paris	11.5%
5	Greece	9.8%	5	Greece	11.4%
6	Vienna	9.4%	6	Germany	9.0%
7	Paris	8.1%	7	London	8.7%
8	Austria	7.6%	8	France	8.3%
9	London	5.4%	9	Prague	7.1%
9	Egypt	5.4%	10	Egypt	6.6%

	Respondents: 1,099 Responses: 2,728	% of respondents*		Respondents: 571 Responses: 1,338	% of respondents*
1	Italy	18.3%	1	Italy	28.0%
2	Paris	13.1%	2	Spain	16.8%
3	Rome	11.6%	3	France	15.9%
4	Greece	11.6%	4	Germany	15.1%
5	France	11.1%	5	Greece	12.3%
6	Berlin	10.0%	6	Rome	10.7%
7	Spain	8.5%	7	Berlin	8.4%
8	Germany	8.2%	8	Paris	8.1%
9	London	8.0%	9	London	5.4%
10	Vienna	6.1%	10	England	4.6%

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

* Multiple response options possible (up to 3 responses)

Theme competence I Base: Three-dimensional competitor analysis



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

Quadrant analysis Black Forest

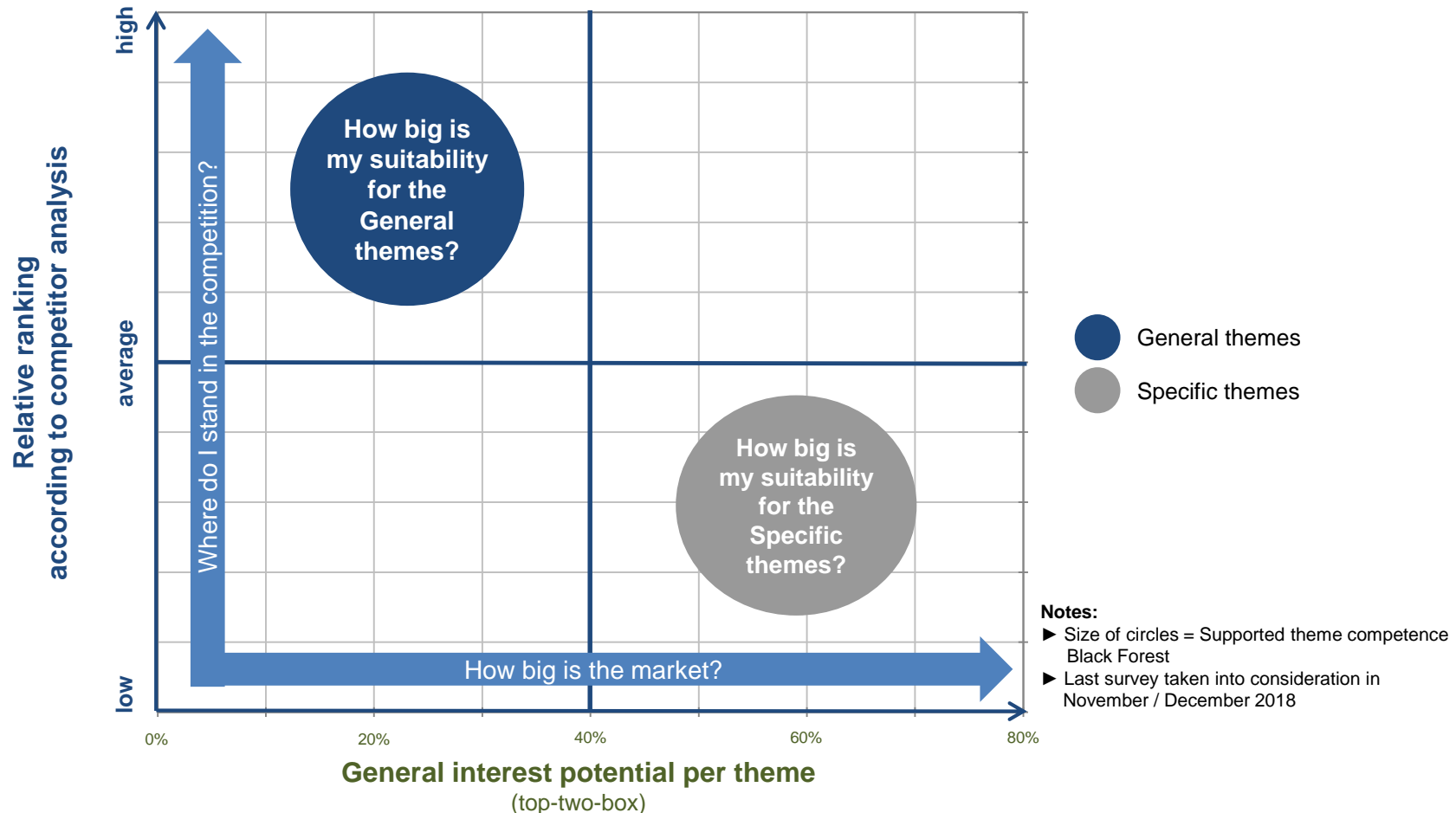
> Category for relative ranking according to competitor analysis:
All considered destinations (up to 33 tourist destinations per theme)

■ Black Forest

Source market: Switzerland

Base: All respondents

Number of respondents: 1,000



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

Quadrant analysis Black Forest

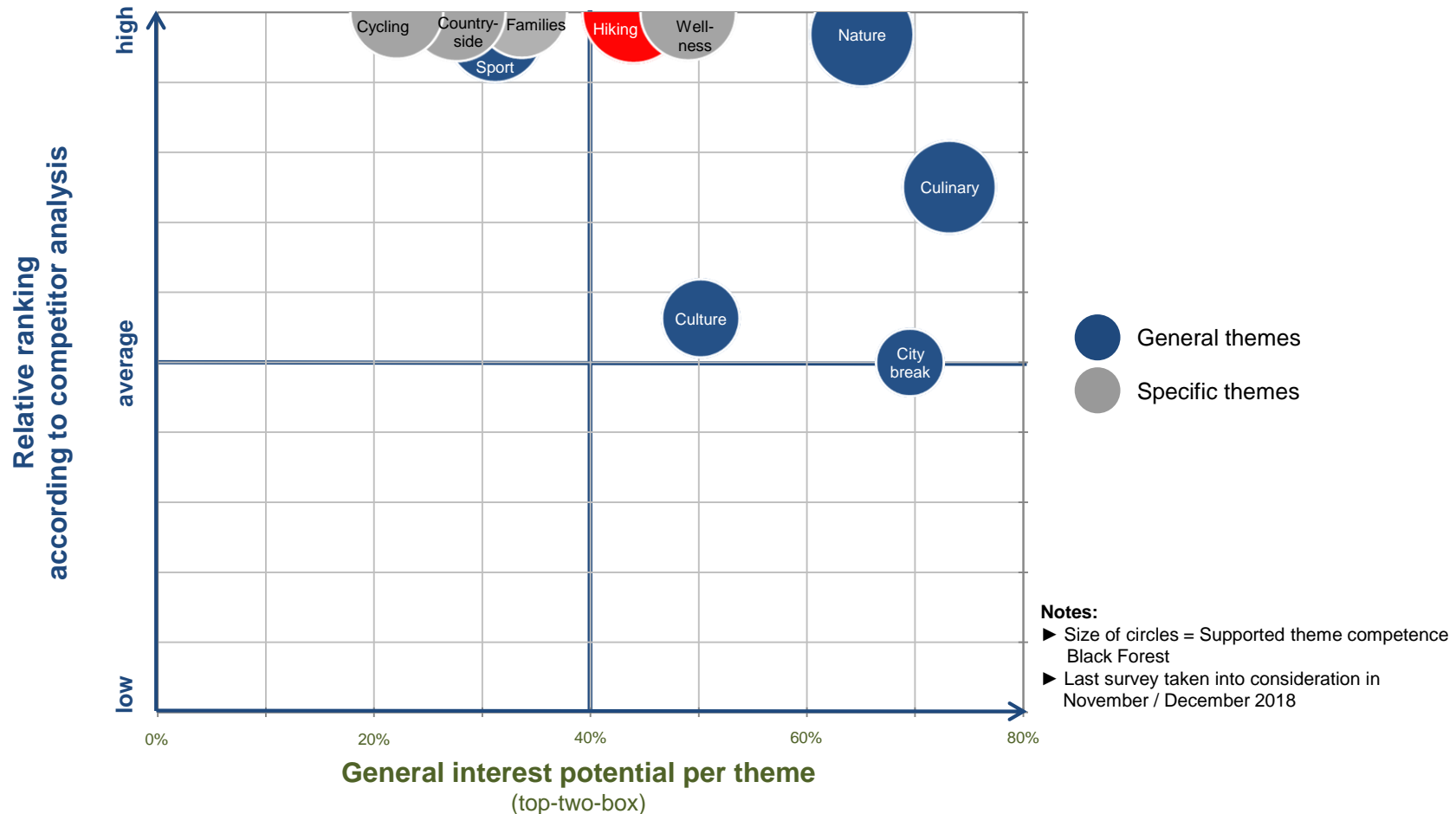
> Category for relative ranking according to competitor analysis:
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■ Black Forest

Source market: Switzerland

Base: All respondents

Number of respondents: 1,000

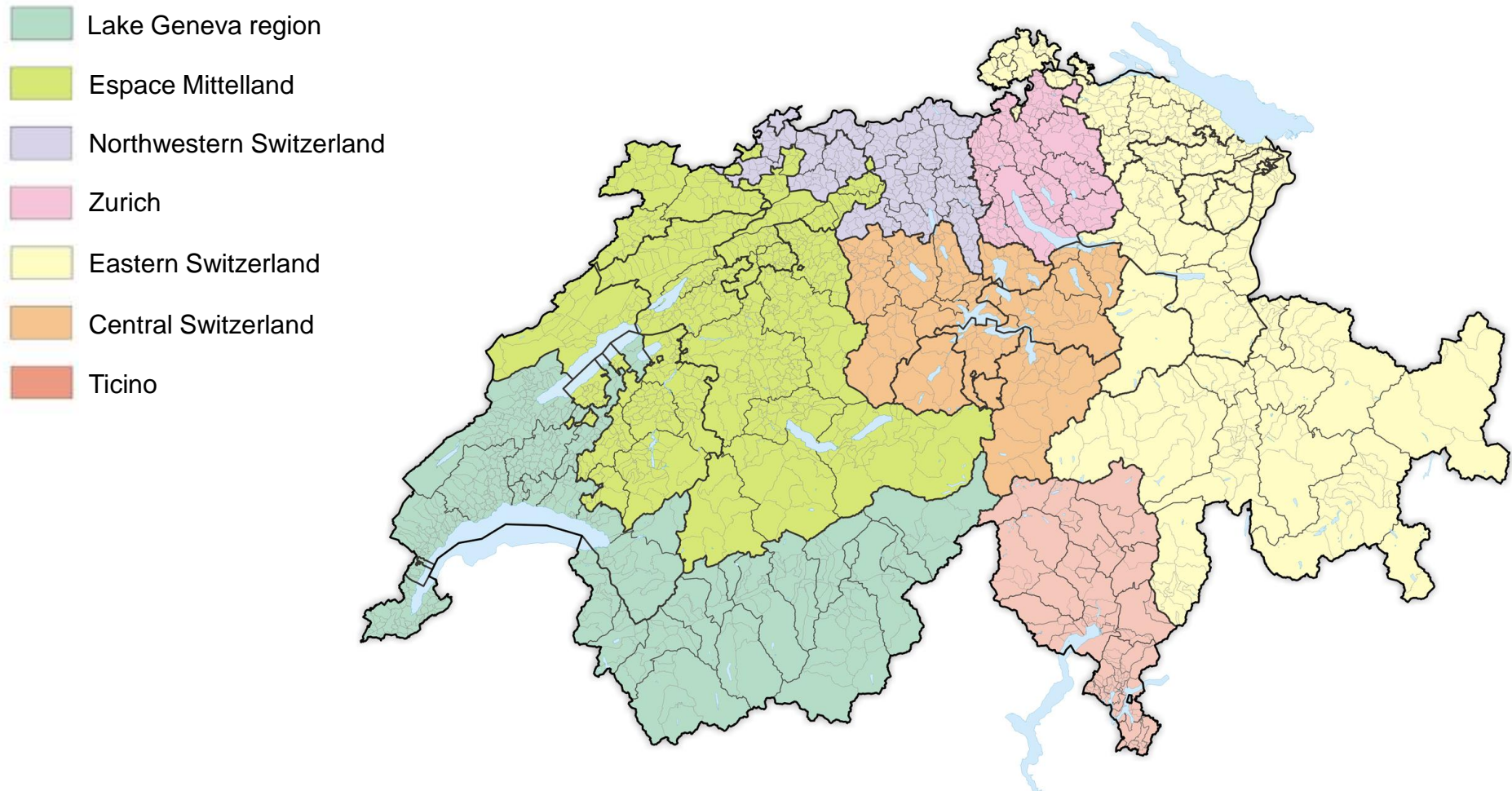


Source: inspektour (international) GmbH / IMT of the FH Westküste, 2018

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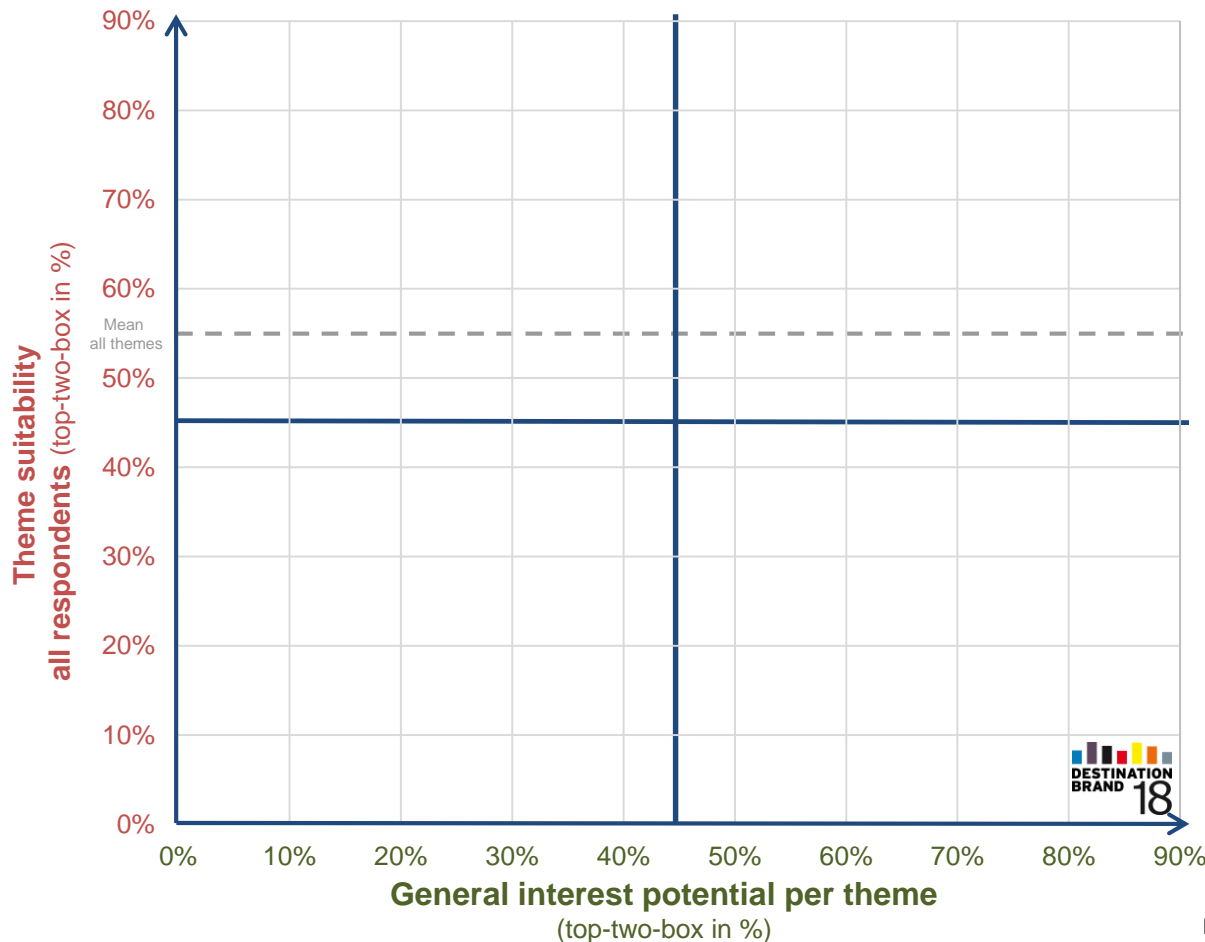
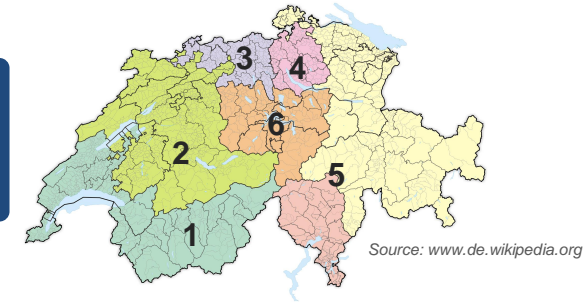
Geographical division of Switzerland in seven regions



Picture: www.de.wikipedia.org

Quadrant analysis destination “Black Forest” in the source market Switzerland

> Theme “hiking” by source market



Region 1*
(Lake Geneva region)

Region 2*
(Espace Mittelland)

Region 3*
(Northwestern Switzerland)

Region 4*
(Zurich)

Region 5*
(Eastern Switzerland & Ticino)

Region 6**
(Central Switzerland)

Theme “Hiking” (orange circle) Mean all respondents (grey circle)

* The sample size for “overnight guests in the past” is below 100, subsequently higher statistical uncertainty to be considered.

** The sample size for “all respondents” and “overnight guests in the past” is below 100, subsequently higher statistical uncertainty to be considered.

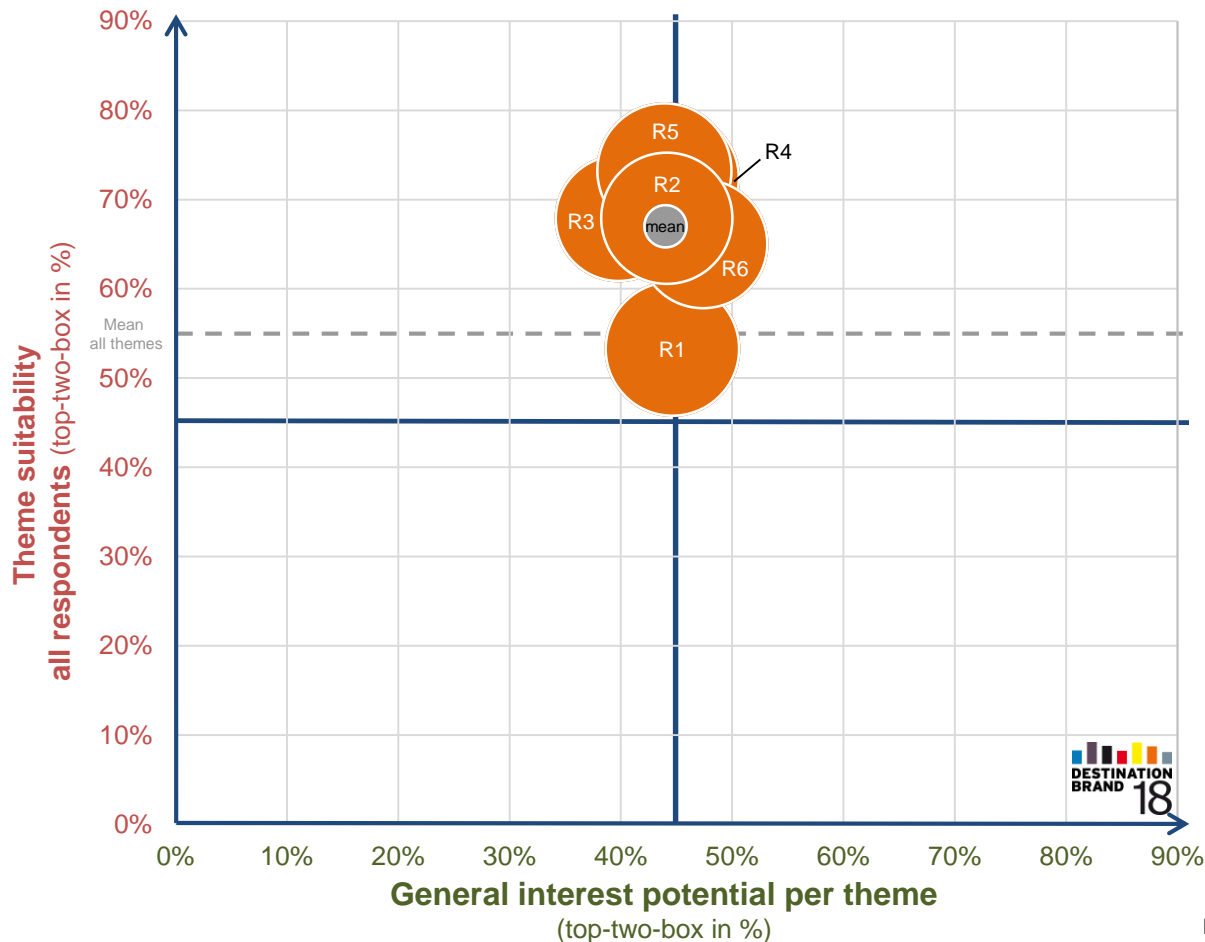
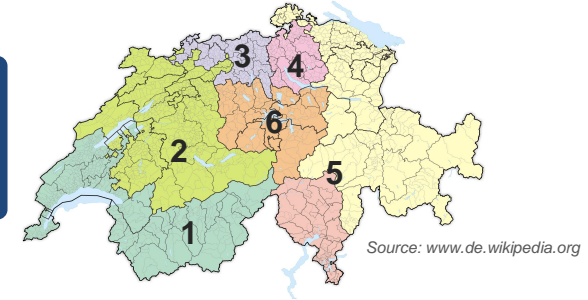
Note:

► Last survey taken into consideration in November / December 2018

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

Quadrant analysis destination “Black Forest” in the source market Switzerland

> Theme “hiking” by source market



- Region 1*
(Lake Geneva region)
- Region 2*
(Espace Mittelland)
- Region 3*
(Northwestern Switzerland)
- Region 4*
(Zurich)
- Region 5*
(Eastern Switzerland & Ticino)
- Region 6**
(Central Switzerland)

Theme “Hiking”

Mean all respondents

* The sample size for “overnight guests in the past” is below 100, subsequently higher statistical uncertainty to be considered.
 ** The sample size for “all respondents” and “overnight guests in the past” is below 100, subsequently higher statistical uncertainty to be considered.

Note:

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Outlook 2019 | Upcoming survey wave

► 2019:

- DESTINATION BRAND in China
- Continuation of the study series in DE, AT, CH and NL (Spontaneous Associations)

► 2020:

- Introduction of DESTINATION BRAND in France, Spain, Italy, UK and USA
- Start of a new DESTINATION BRAND-cycle with the research focus on “brand value” (1st year of the study series) in all source markets:
 - Austria, Germany, the Netherlands and Switzerland
 - China
 - France, Spain, Italy, UK and USA

Thank you for listening!

Questions? More information? Please contact us at any time:

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Source: inspektour (international) GmbH / IMT, 2018

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

DESTINATION BRAND

www.destination-brand.com

Source: inspektour (international) GmbH / IMT, 2018

Your Destination Brand-team:

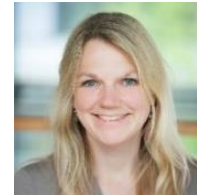


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List of considered destinations in DESTINATION BRAND 18

	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				

	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				

	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 Alp				
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				

List of considered holiday activities in DESTINATION BRAND 18

General themes

(examined for all destinations)

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



Specific themes

(individual selection of 5 themes per destination)

- | | |
|-----------------------------------|---------------------------------|
| 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. Indigenous peoples | 31. Water sports |
| 18. Industrial heritage | 32. Wellness |
| 19. Lively places | 33. Winter sports |

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

Source: inspektour (international) GmbH / IMT, 2018