DESTINATION BRAND 20:
Perception of tourism cities in times of COVID-19

Webinar, 16th of March 2021

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DESTINATION BRAND: the study series 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

>500

Since 2018: AT, CH, NL and 2019 CN

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

DESTINATION BRAND

12 years DESTINATION BRAND

Destination Brand – a cooperative project

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German Institute
for Tourism Research

What can you expect from this webinar?

1. **DESTINATION BRAND 20 at a glance**
2. **Presentation of selected results for European cities:**
   - **Comparison of general demand-side conditions for city trips in major tourism source markets**
   - **Perception of tourism cities with focus on the source market Germany**
3. **Conclusion and outlook**

DESTINATION BRAND 20
at a glance

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DESTINATION BRAND 20: overview of the study design

Measurement of the
Brand Value

Online survey
Field work: end of Oct. to beginning of Dec. 20

Travel destinations
>190

Source market Germany: target group analysis based on BeST-traveler typology and SINUS-Milieus

Souce markets
10

Ipsos

Representative of the local population aged between 14 to 74 years*

DESTINATION BRAND

12 years DESTINATION BRAND

** Exception China:*
Representative of Ipsos panel participants in China, representing the following criteria: the urban residential population (Tier 1 to 3 cities excluding Hong Kong and Macau) between 14 and 59 years of age with Internet access, showing an affinity for foreign travel according to additional upstream filter questions

Overview cases and time of fieldwork per source market

Source market	Number of cases (n)
Germany	19,000
Austria	1,000
Switzerland	1,000
Netherlands	1,000
France	2,000
Italy	2,000
Spain	1,000
United Kingdom	2,000
USA	1,000
China	1,000

Presentation of selected results for European cities

Demand-side conditions for city breaks

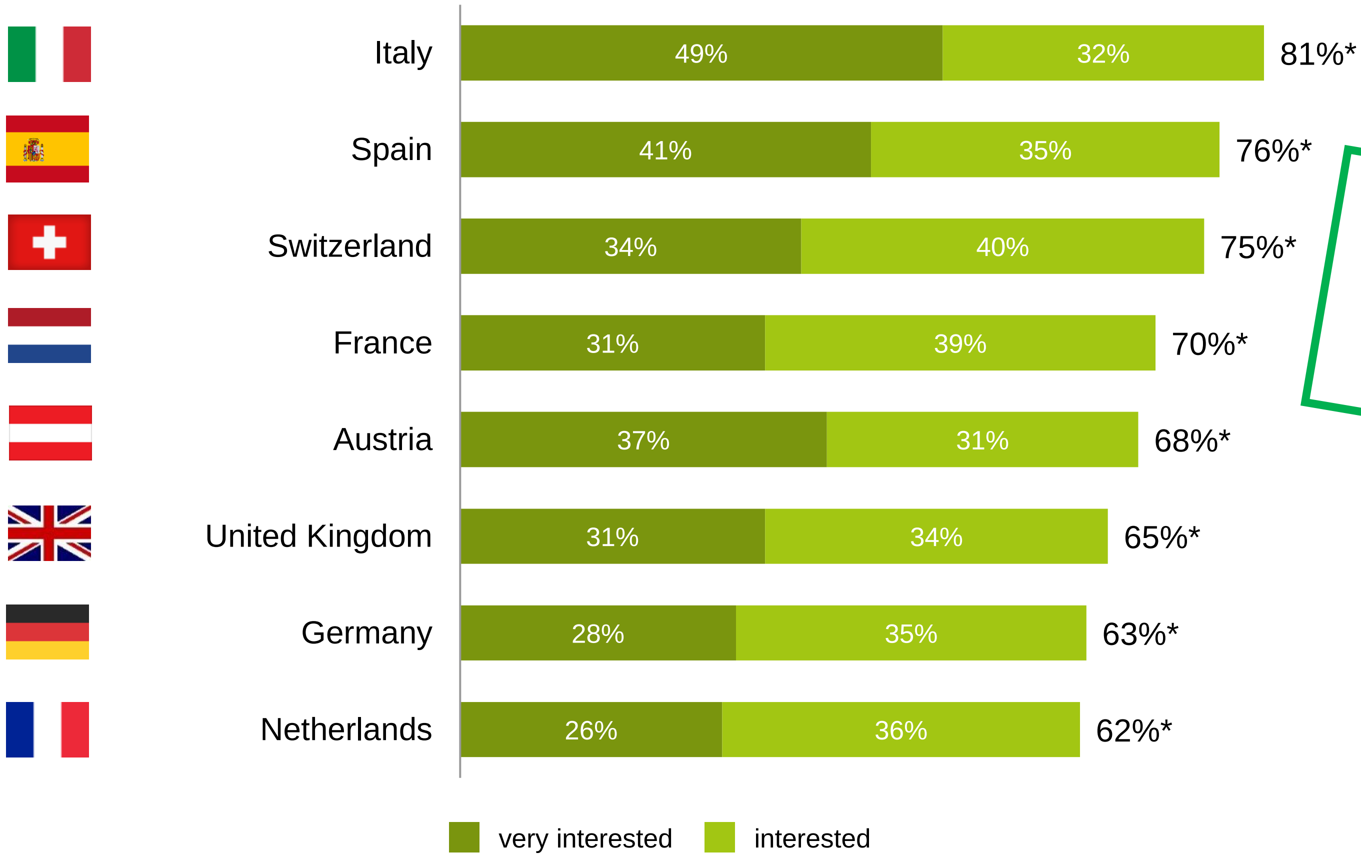
General interest in taking a city break

Question:

How interested are you in pursuing the following touristic holiday activities in your holiday with at least one overnight stay?

„Taking a city break“

General interest in holiday activity„taking a city break“:
Comparison of major European source markets



All source markets: In Top-5 out of round about 40 holiday activities that were tested

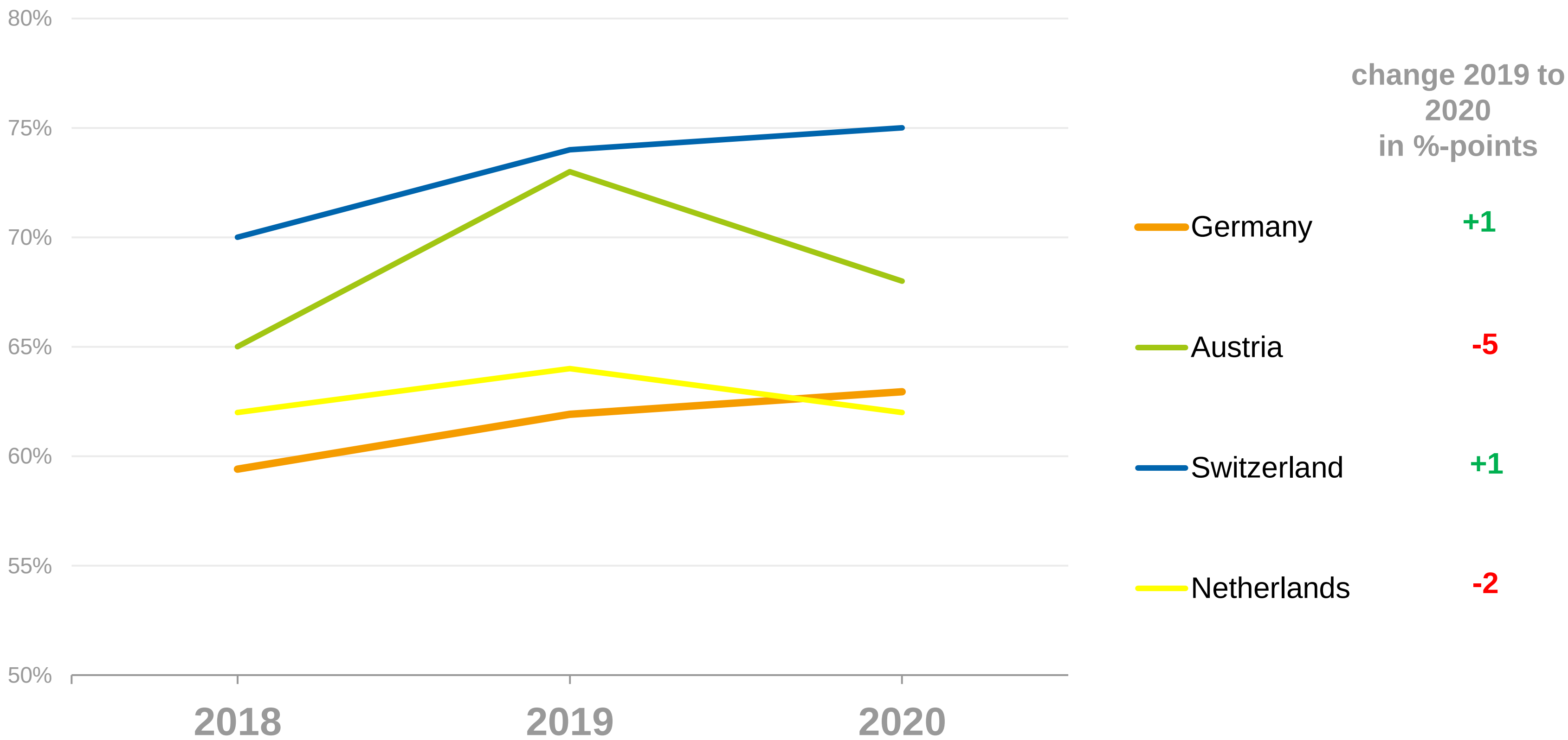
Base: all respondents (n = min. 1,000)

Top-Two-Box: „5 = very interested“ to „1 = not at all interested“; Angabe in % der Befragten

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

* Possible deviations of 1% from the sum of the individual values are due to rounding.

General interest in holiday activity„taking a city break“:
Development over the last three years



Base: all respondents (n = min. 1,000)

Top-Two-Box: „5 = very interested“ bis „1 = not at all interested“; Angabe in % der Befragten

Source: inspektour (international) GmbH / DITF at the FH Westküste, 2010-2020

COVID-19: „Strategies“ for future holidays

Base: „city break enthusiasts“

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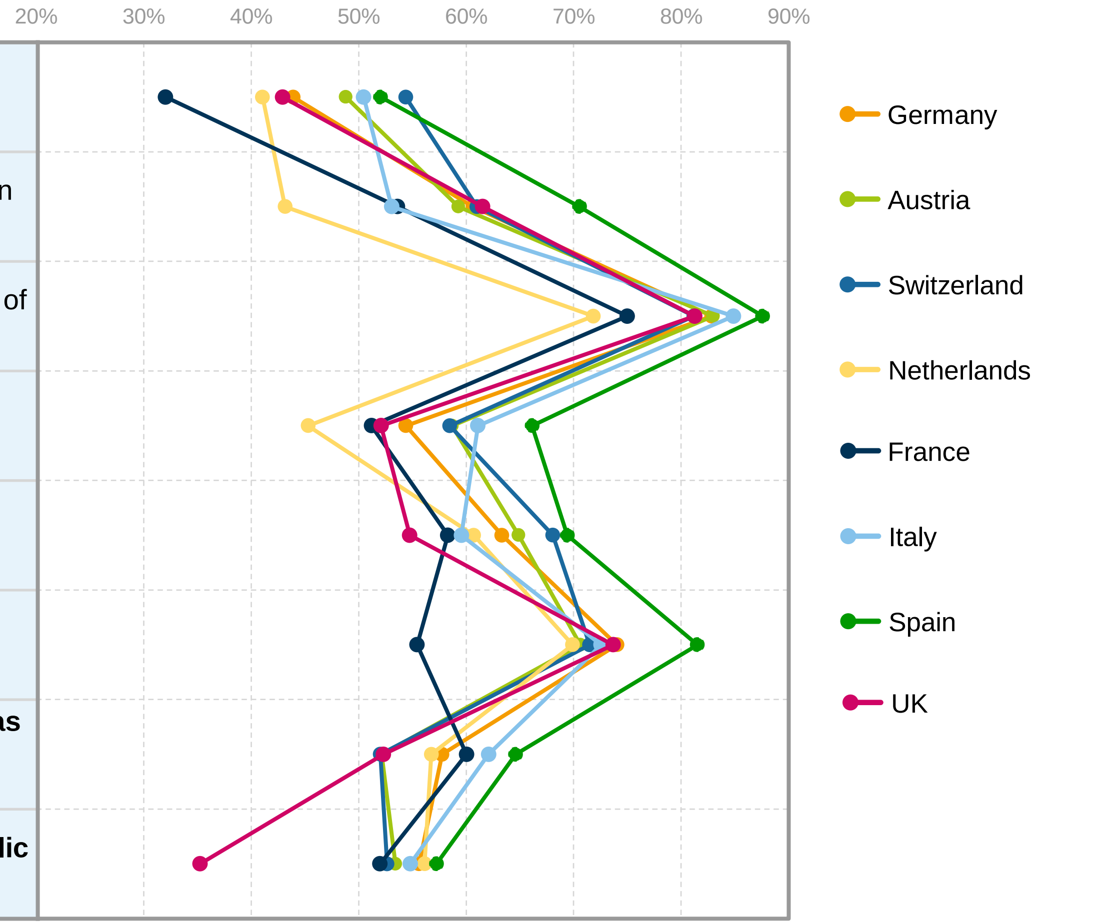
COVID-19: „Strategies“ for future holidays

Question: Based on the experiences from the past few months […], what are you going to focus on in the future concerning holiday trips?

- That I'm **familiar** with the holiday region.
- That I travel with a **tour operator** who takes care of me in an emergency.
- That the holiday destination and the accommodation are of **impeccable hygiene.**
- That I don't get in **close contact** with other people.
- That I can **get home quickly**.
- That the destination has **no or only minor COVID-19 infections.**
- That I choose a form of **accommodation** in which I live **as separately as possible** from other tourists (e.g., holiday home instead of hotel).
- That I travel with **my own vehicle instead of using public transport** (flight, bus, train, ship).



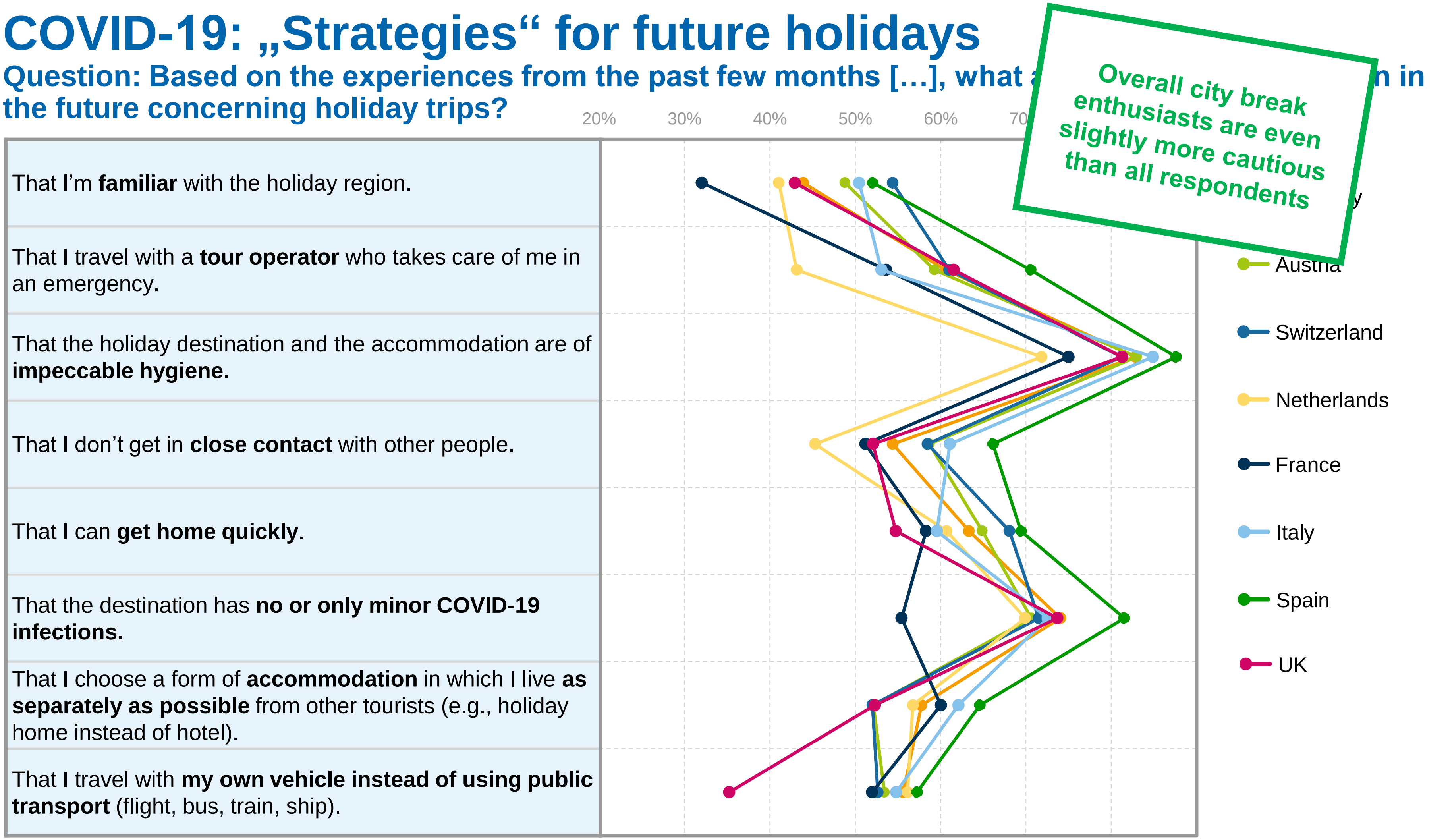
Base: respondents interested in city breaks (n = min. 623)

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

Top-Two-Box: „5 = I fully agree“ to „1 = I fully disagree“; in % of respondents

COVID-19: „Strategies“ for future holidays

Question: Based on the experiences from the past few months […], what a[…]n in the future concerning holiday trips?



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Top-Two-Box: „5 = I fully agree“ to „1 = I fully disagree“; in % of respondents

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

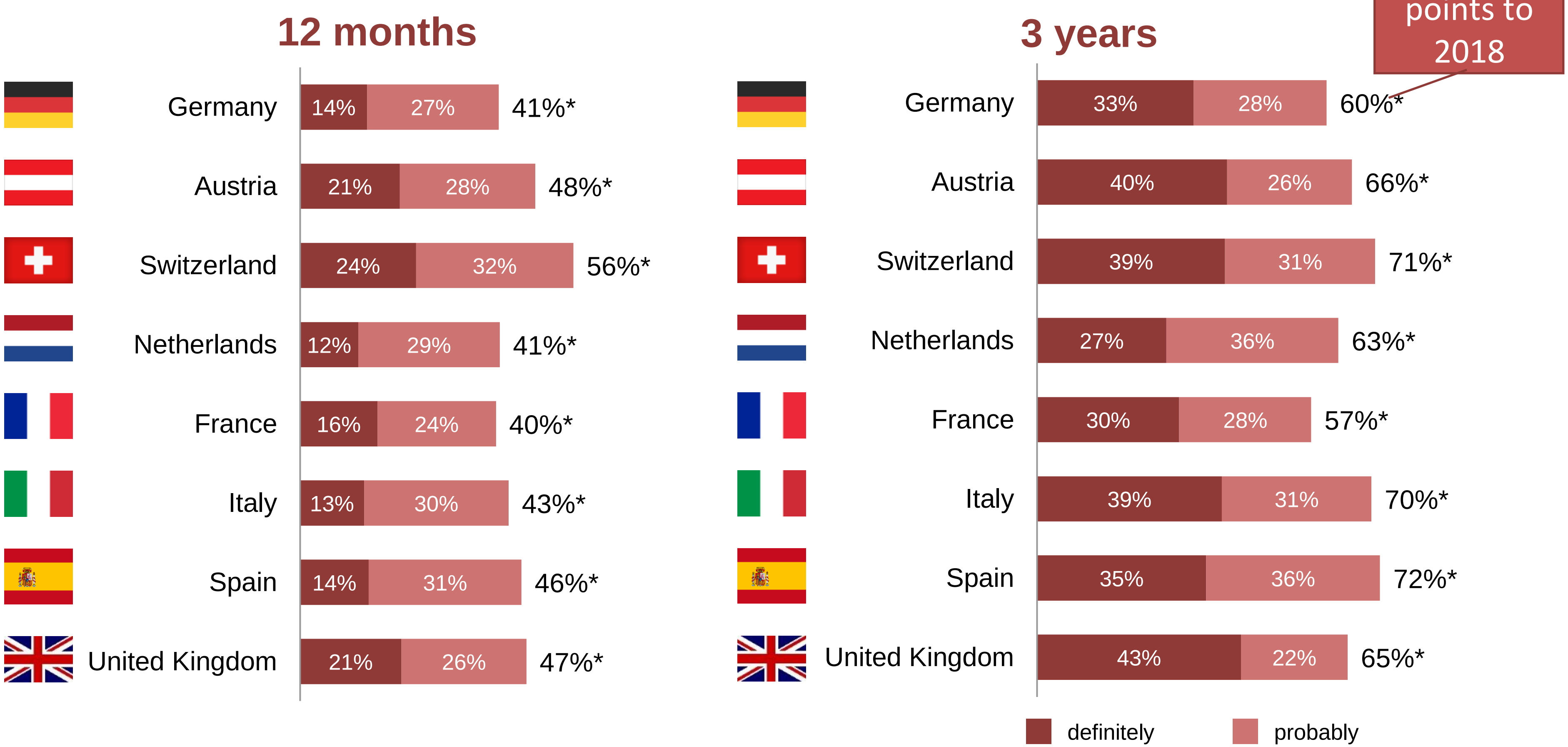
General intentions of city break enthusiasts in major European markets to travel abroad

Intentions for:

Short trips (with 1-3 overnight stays)

Longer holiday trips (with 4 or more overnight stays)

General intentions of city break enthusiasts to travel abroad for short trips within next 12 months / 3 years



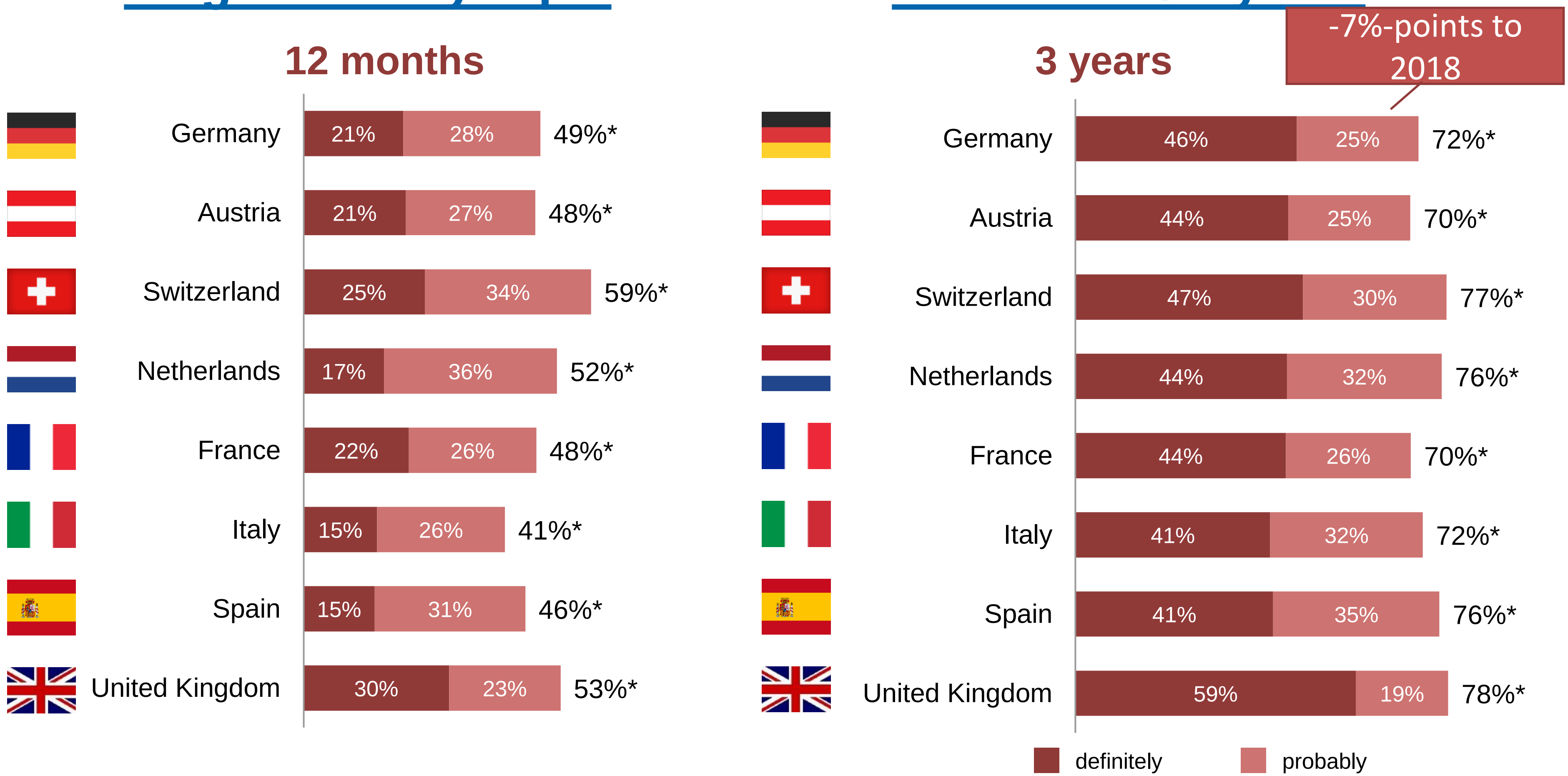
Source: inspektour (international) GmbH / DITF at the FH Westküste, 2020

Base: respondents interested in city breaks (n = min. 623)

Top-Two-Box: „4 = definitely" to „1 = definitely not"; in % of respondents

* Possible deviations of 1% from the sum of the individual values are due to rounding.

General intentions of city break enthusiasts to travel abroad for longer holiday trips within next 12 months / 3 years



Base: respondents interested in city breaks (n = min. 623)

Top-Two-Box: „4 = definitely“ to „1 = definitely not“; in % of respondents

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

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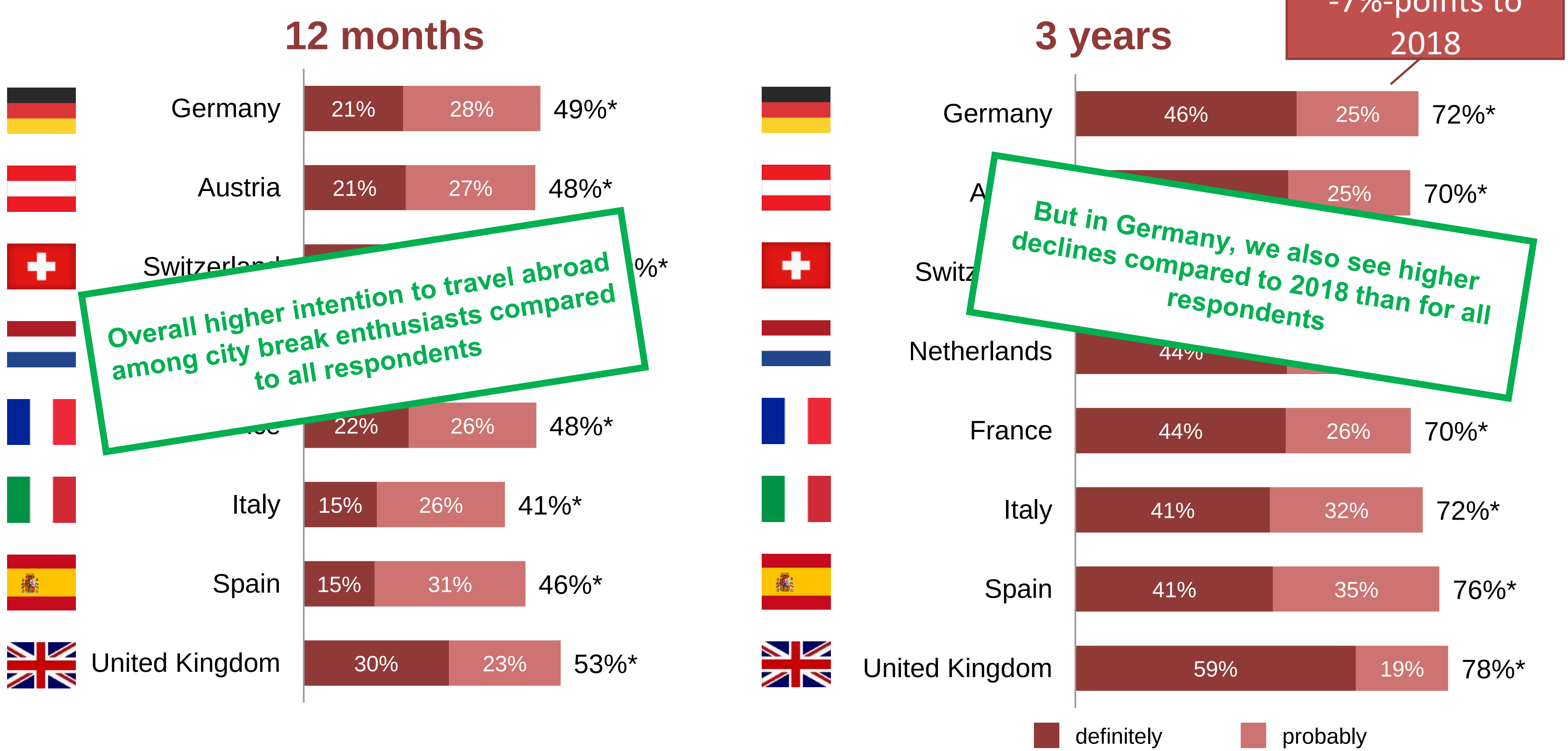
General intentions of city break enthusiasts to travel abroad for longer holiday trips within next 12 months / 3 years



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Top-Two-Box: „4 = definitely“ to „1 = definitely not“; in % of respondents

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

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Awareness (“Familiarity”) of international cities in key markets

(open question)

When considering

<u>a holiday for a stay of at least one night</u>,

which foreign tourist destinations spring to your mind?

Unsupported awareness of international cities: TOP 5-Ranking per source market

	DE	AT	CH	NL	FR	IT	ES	UK	US	CN
Paris	1	1	1	2		1	1	1	1	1
London	2	3	2	1	1	2	2		2	2
Rome	4	4	4	4	2		3	3	3	
Berlin		2	3	3		4	4	5	5	4
Amsterdam	5		5		5			2		
Vienna	3									3
Barcelona		5		5	3	3		4		
New York					4					
Cancun									4	
Madrid						5				
Lisbon							5			
Tokyo										5

Base: all respondents with valid responses (n = min. 798)
Indication of the rankings on the basis of the responses submitted

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

Presentation of selected core results

Source market: Germany

Awareness of
German + international cities
(open question)

Unsupported awareness of international cities: TOP 10-Ranking in Germany

… from 1 overnight

Rank Cities		2020 Overall Ranking	2018 Overall Ranking	2018 Rank Cities
1	Paris	9	11	2
2	London	12	10	1
3	Vienna	19	23	4
4	Rome	21	25	5
5	Amsterdam	22	23	3
6	Prague	23	29	6
7	Barcelona	32	34	8
8	New York	37	30	7
9	Dubai	42	45	9
10	Venice	46	56	11

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

Base: all respondents in the source market Germany with valid responses (n = 15.631, n = 1.864)

** Multiple answers possible (in % of respondents)*

Unsupported awareness of German cities: TOP 10-Ranking in Germany

… for short trips

Rank	Cities	Overall Ranking
1	Berlin	1
2	Hamburg	2
3	Munich	5
4	Cologne	9
5	Dresden	10
6	Leipzig	15
7	Frankfurt	18
8	Stuttgart	19
9	Bremen	25
10	Düsseldorf	27

… for longer holidays

Rank	Cities	Overall Ranking
1	Berlin	3
2	Hamburg	4
3	Munich	7
4	Cologne	14
5	Dresden	16
6	Leipzig	23
7	Frankfurt	24
8	Stuttgart	26
9	Bremen	30
10	Düsseldorf	38

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

Base: all respondents in the source market Germany with valid responses (n = min. 16.046)

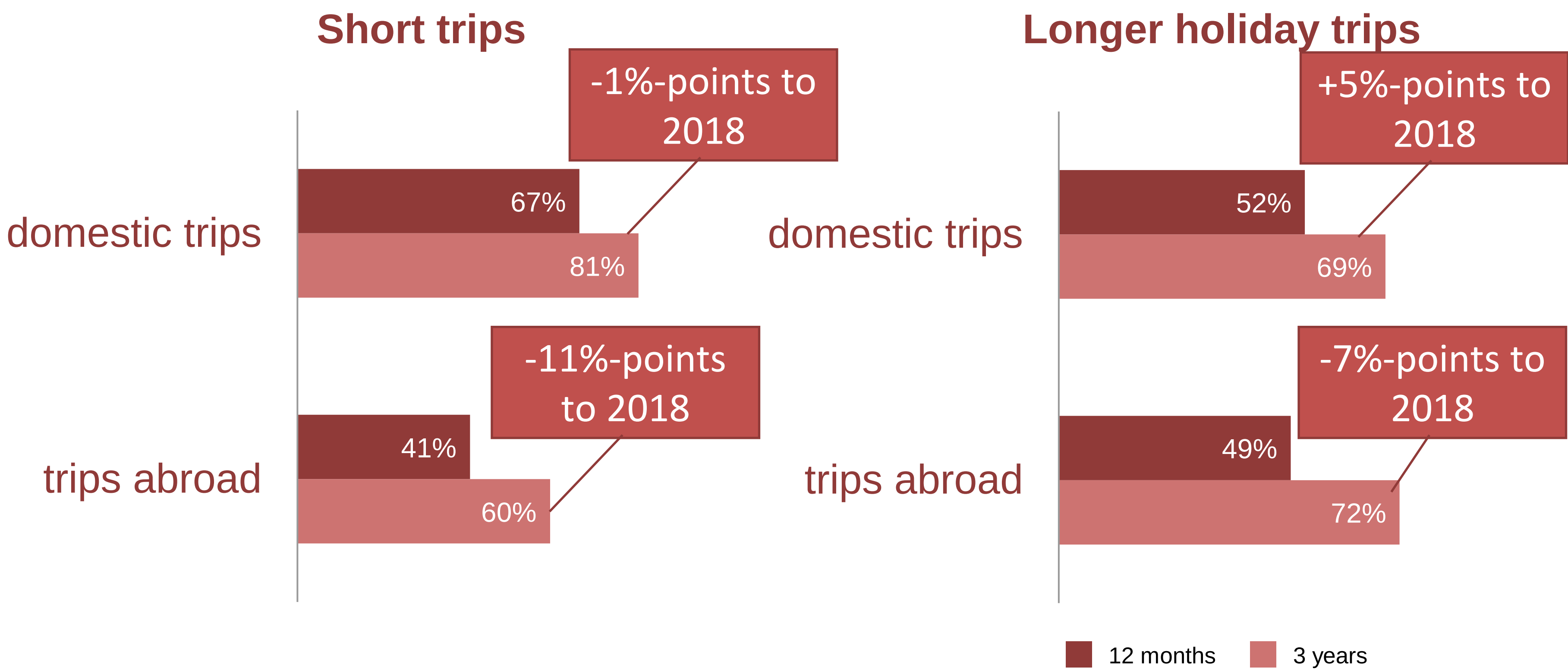
** Multiple answers possible (in % of respondents)*

Destination preferences

General trends

General intentions of German city break enthusiasts to travel abroad versus to travel domestically

General intentions of city break enthusiasts to travel abroad versus to travel domestically



Base: all respondents in Germany (n = min. 4,000)

Top-Two-Box: „4 = definitely“ bis „1 = definitely not“; in % of respondents

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

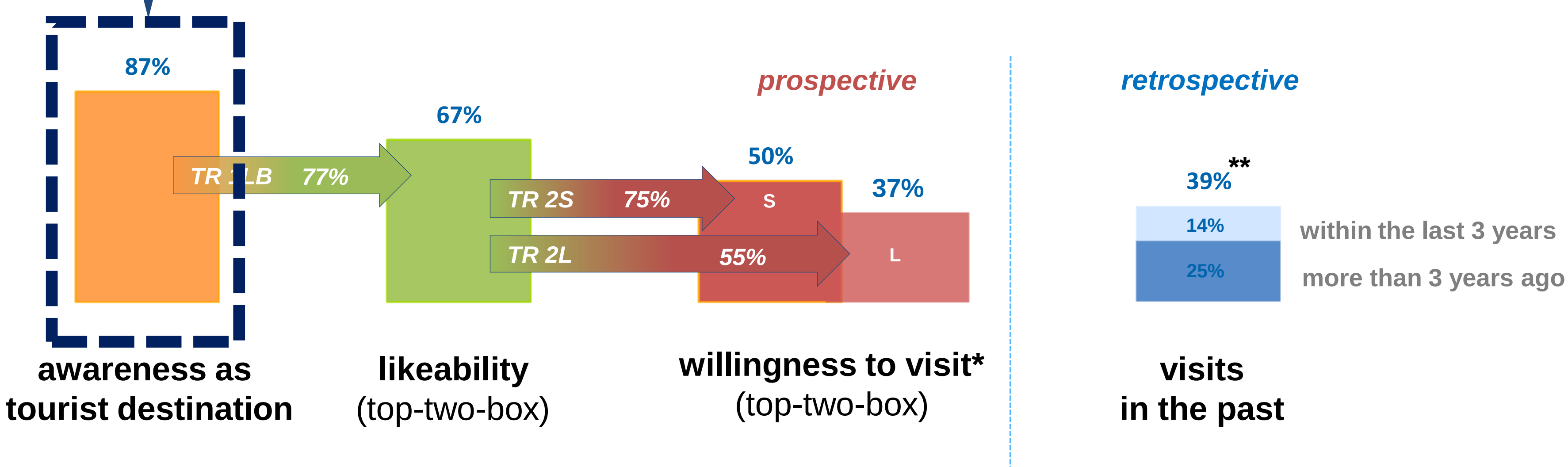
Destination preferences

General trends

Four-dimensional brand funnel – the model at a glance

Process step values

Indicate the share of respondents that reaches the respective funnel level.
In this example, 87% of the respondents know the tourist destination.



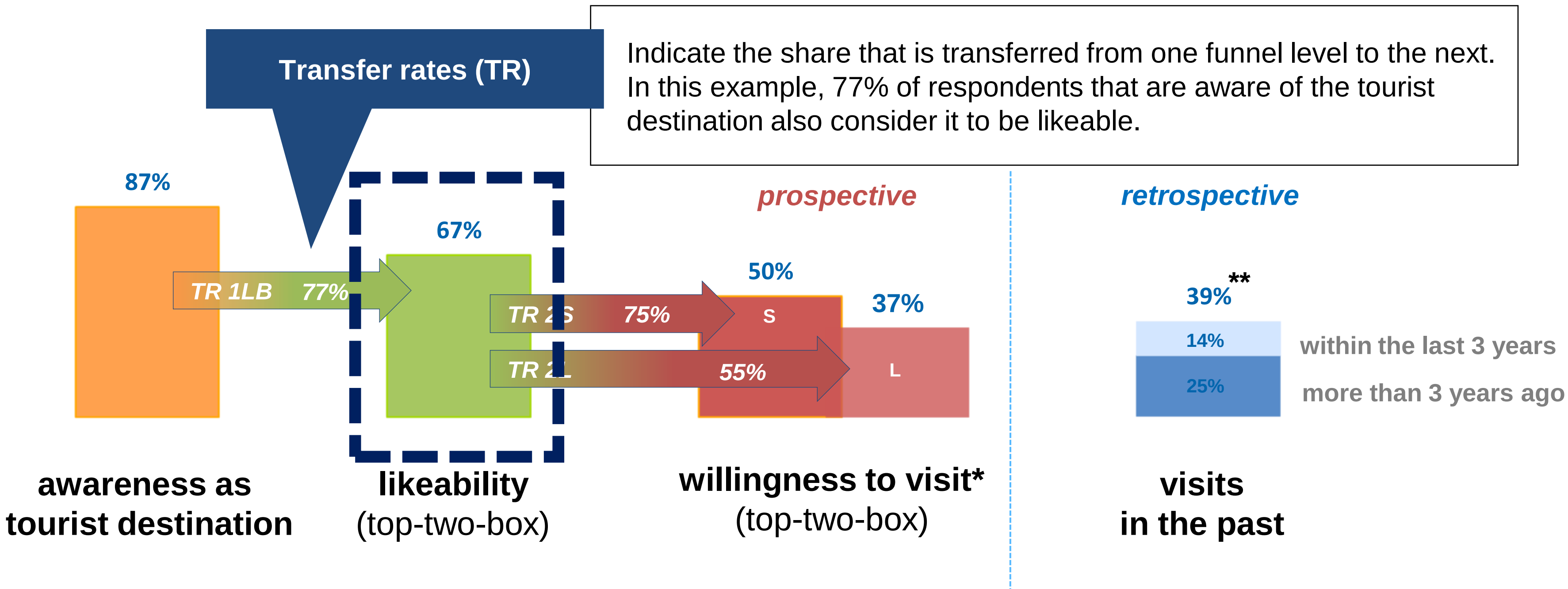
*Remark 1: * S = willingness to visit for short trips with 1-3 overnight stays; L = willingness to visit for longer holiday trips with 4 or more overnight stays*

*Remark 2: ** Deviation from the sum of the individual values are possible due to multiple response options related to the time of the previous holiday.*

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

► **Note:** Visualisation example with fictional values.

Four-dimensional brand funnel – the model at a glance



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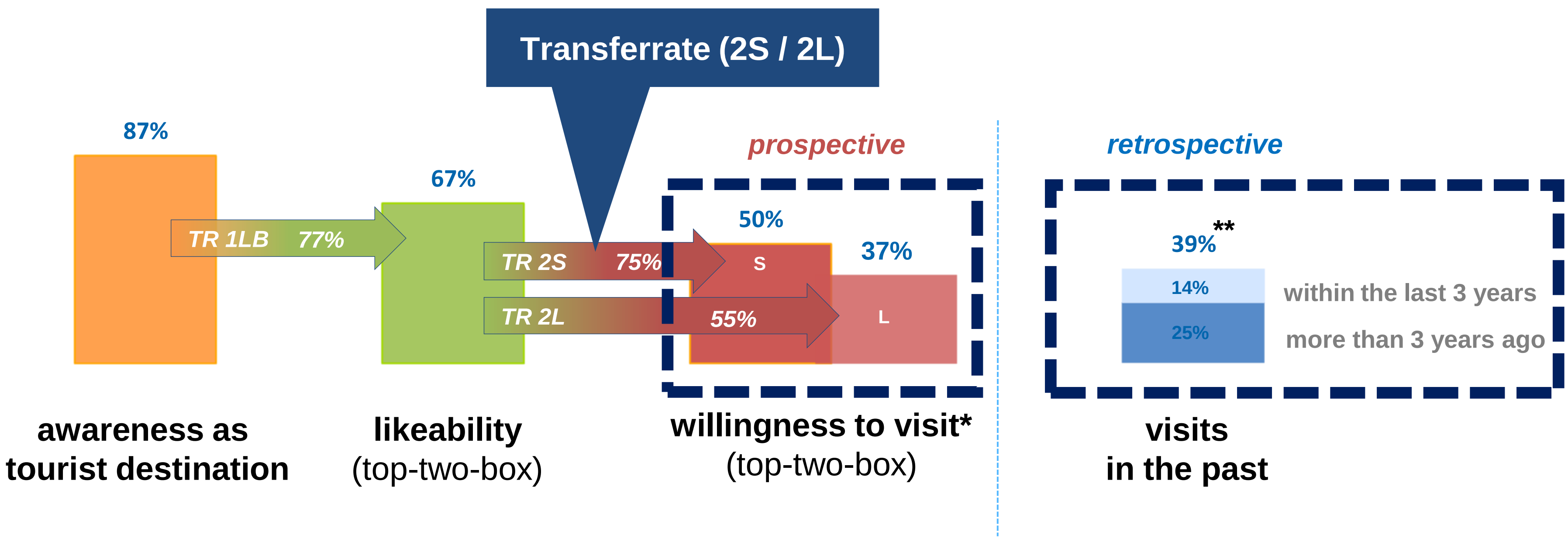

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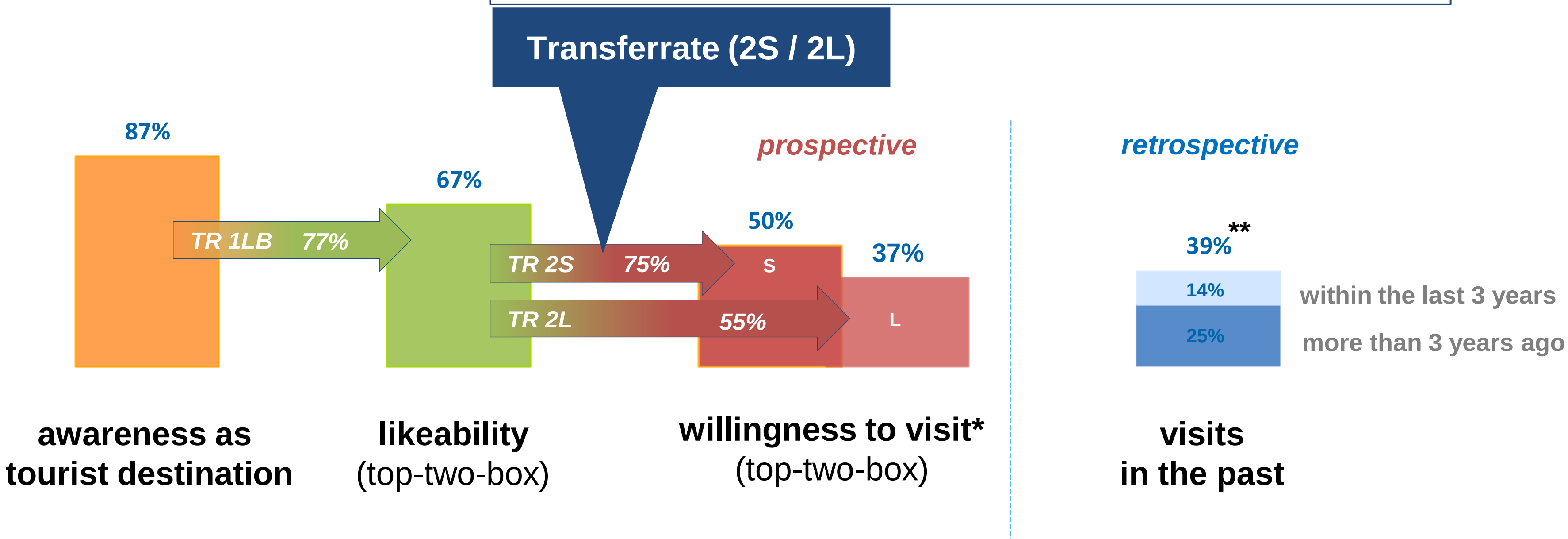
Four-dimensional brand funnel – the model at a glance

The question here is how the individual destinations succeed in triggering a willingness to visit for short or longer holidays among those who “like” the destination



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

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Short holidays: Domestic vs. intern. destinations (12 months)

Base TR2: Willingness to visit the destination among those who like the destination

Domestic destinations (150) International destinations (40)

1 = 56%

Ø= 39%

190 = 9%

1	2	2	4	5	6	7	8	8	8	8	8	8	14	15	16	17	18	19
20	21	22	23	23	25	25	27	27	29	30	31	31	33	33	35	36	37	38
39	40	41	42	42	44	45	46	47	47	49	50	50	52	53	54	54	54	54
54	54	60	61	61	63	63	65	65	67	68	69	69	71	71	73	74	75	76
76	78	78	78	78	82	83	84	84	86	87	87	87	87	91	92	93	94	95
96	96	98	98	98	101	101	101	101	101	106	107	108	109	109	111	112	112	114
115	115	117	117	117	117	121	122	123	124	125	125	125	128	129	130	130	132	133
134	135	135	137	138	139	139	141	142	143	144	144	144	147	148	149	150	151	152
153	154	155	156	157	158	159	159	161	162	163	164	165	165	167	168	169	170	171
171	173	174	175	176	177	178	178	180	181	182	183	184	185	186	187	188	189	190

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

Base: all respondents (n = 1.000 per destination)
Indication of the rankings based on the transfer rate 2K (next 12 month)

Short holidays: Domestic vs. intern. cities (12 months)

Base TR2: Willingness to visit the destination among those who like the destination

Domestic cities | International cities

1 = 56%

Ø= 39%

190 = 9%

1	2	2	4	5	6	7	8	8	8	8	8	8	14	15	16	17	18	19
20	21	22	23	23	25	25	27	27	29	30	31	31	33	33	35	36	37	38
39	40	41	42	42	44	45	46	47	47	49	50	50	52	53	54	54	54	54
54	54	60	61	61	63	63	65	65	67	68	69	69	71	71	73	74	75	76
76	78	78	78	78	82	83	84	84	86	87	87	87	87	91	92	93	94	95
96	96	98	98	98	101	101	101	101	101	106	107	108	109	109	111	112	112	114
115	115	117	117	117	117	121	122	123	124	125	125	125	128	129	130	130	132	133
134	135	135	137	138	139	139	141	142	143	144	144	144	147	148	149	150	151	152
153	154	155	156	157	158	159	159	161	162	163	164	165	165	167	168	169	170	171
171	173	174	175	176	177	178	178	180	181	182	183	184	185	186	187	188	189	190

Base: all respondents (n = 1.000 per destination)
Indication of the rankings based on the transfer rate 2K (next 12 month)

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

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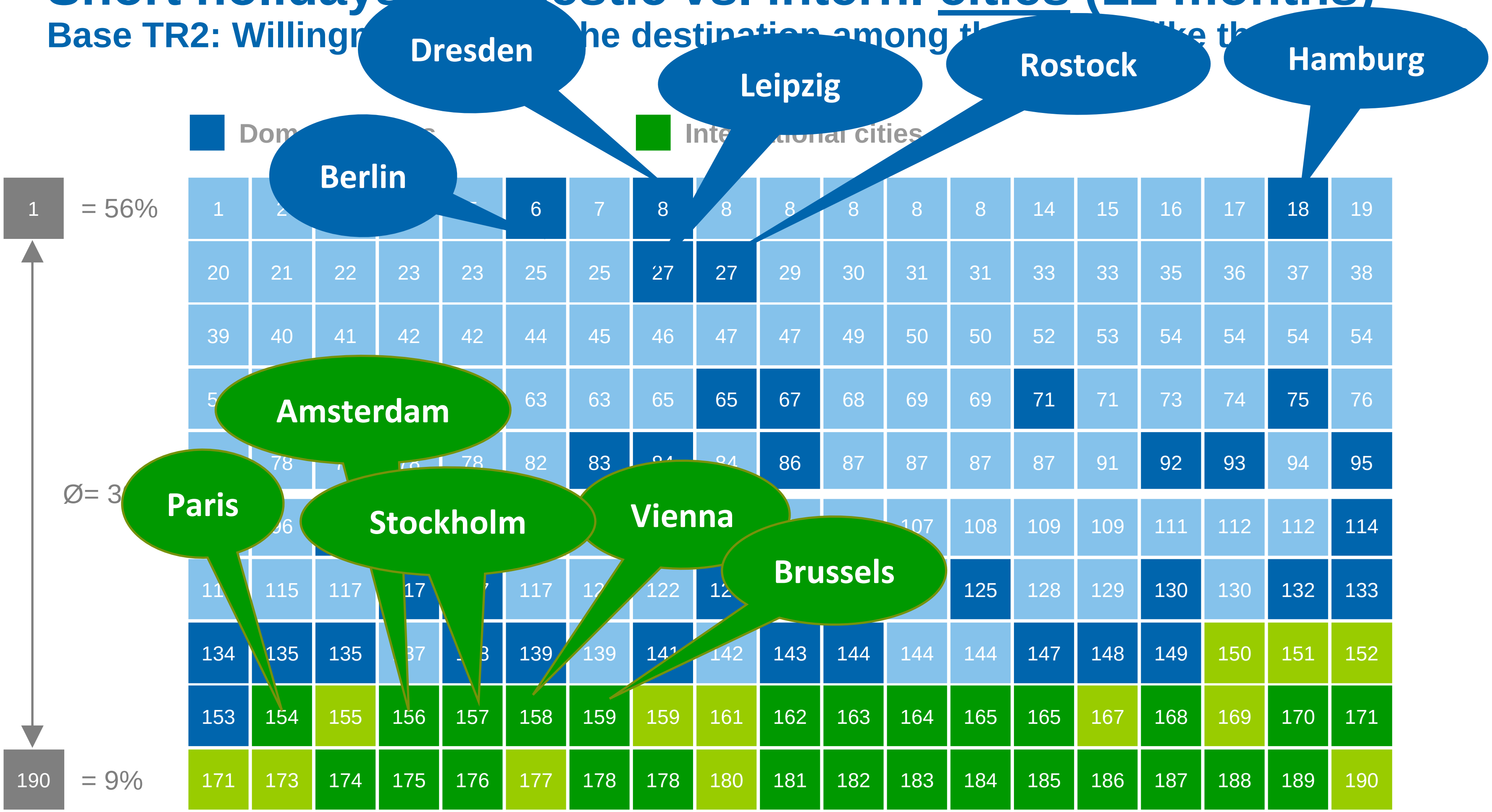
Short holidays: Domestic vs. intern. cities (12 months)

Base TR2: Willingn… the destination among t… like th…



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Base: all respondents (n = 1.000 per destination)

Indication of the rankings based on the transfer rate 2K (next 12 month)

Short holidays: Domestic vs. intern. destinations (3 years)

Base TR2: Willingness to visit the destination among those who like the destination

Domestic destinations (150) International destinations (40)

1 = 79%

Ø= 62%

190 = 26%

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	16	18	18
20	21	21	23	24	24	24	27	28	29	30	30	32	33	34	34	34	37	38
38	38	38	42	43	43	45	46	47	47	49	49	51	52	52	54	55	55	57
57	59	60	61	61	63	64	64	66	67	68	69	69	71	71	73	74	74	74
74	74	74	74	74	74	74	74	74	86	87	88	89	90	91	92	92	94	95
96	97	97	97	100	101	102	102	104	104	106	107	108	109	109	111	111	111	114
114	116	116	118	119	120	121	122	123	124	124	124	124	124	129	130	130	130	133
134	135	136	136	138	139	140	141	142	143	144	145	146	147	148	148	150	151	152
153	154	155	156	157	158	159	160	161	161	163	164	165	166	167	168	168	170	171
172	173	174	175	176	177	178	179	180	181	182	183	184	185	186	187	188	189	190

Base: all respondents (n = 1.000 per destination)
Indication of the rankings based on the transfer rate 2K (next 12 month)

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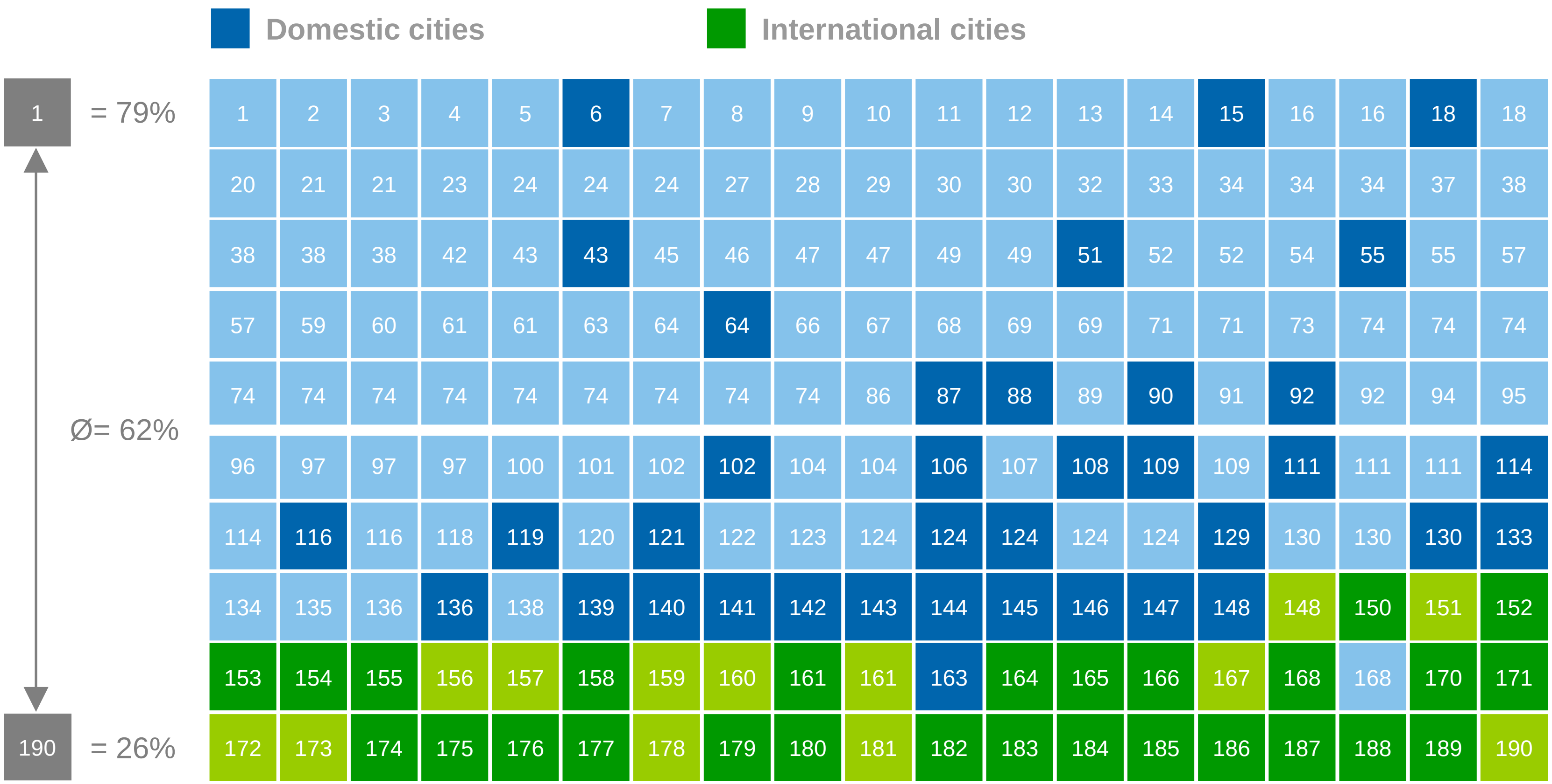
Short holidays: Domestic vs. intern. cities (3 years)

Base TR2: Willingness to visit the destination among those who like the destination



Base: all respondents (n = 1.000 per destination)
Indication of the rankings based on the transfer rate 2K (next 12 month)

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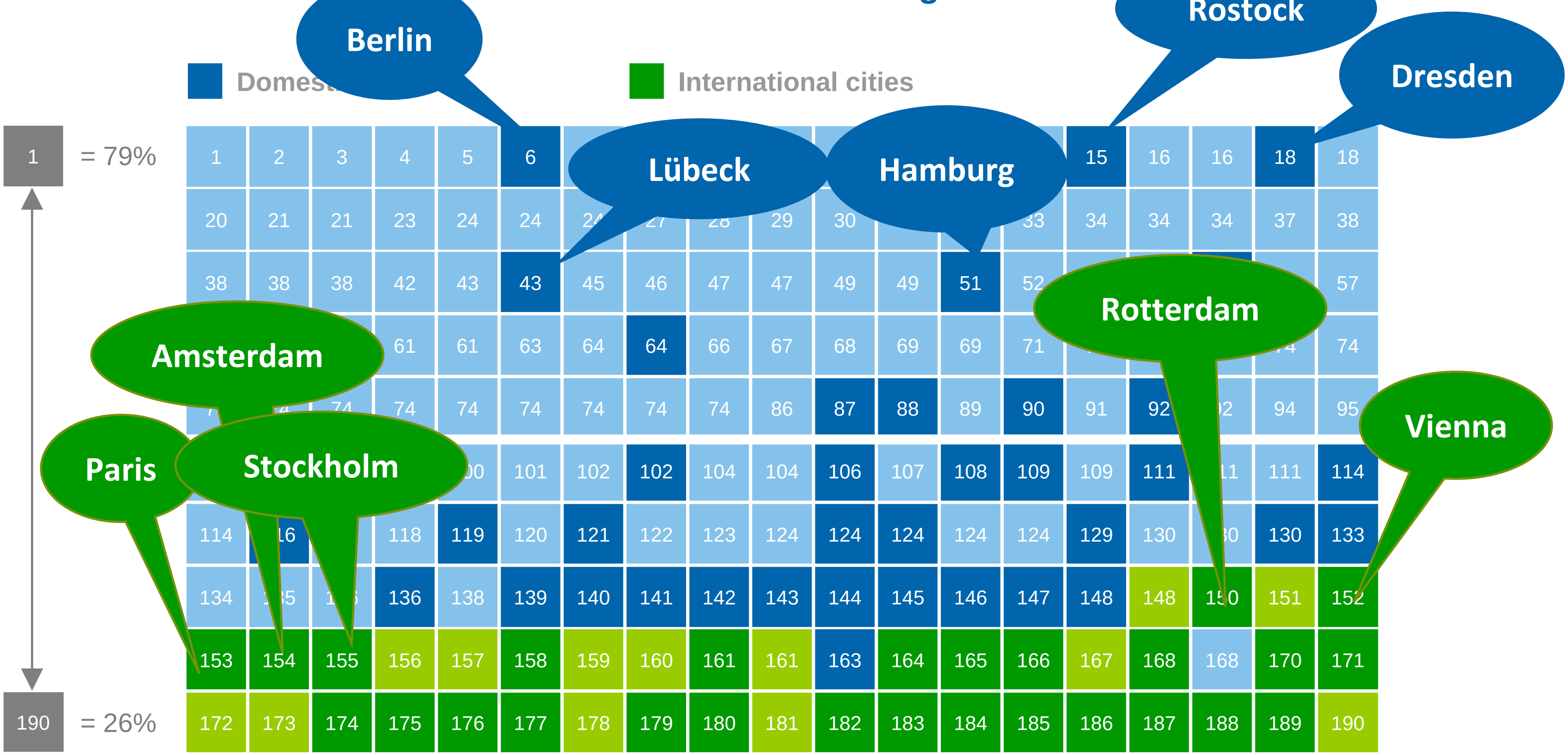
Short holidays: Domestic vs. intern. cities (3 years)

Base TR2: Willing… to visit the destination among those who … ination



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

Base: all respondents (n = 1.000 per destination)
Indication of the rankings based on the transfer rate 2K (next 12 month)

Longer holidays: Domestic vs. intern. destinations (12 months)

Base TR2: Willingness to visit the destination among those who like the destination

Domestic destinations (150) International destinations (40)

1 = 52%

Ø= 34%

190 = 20%

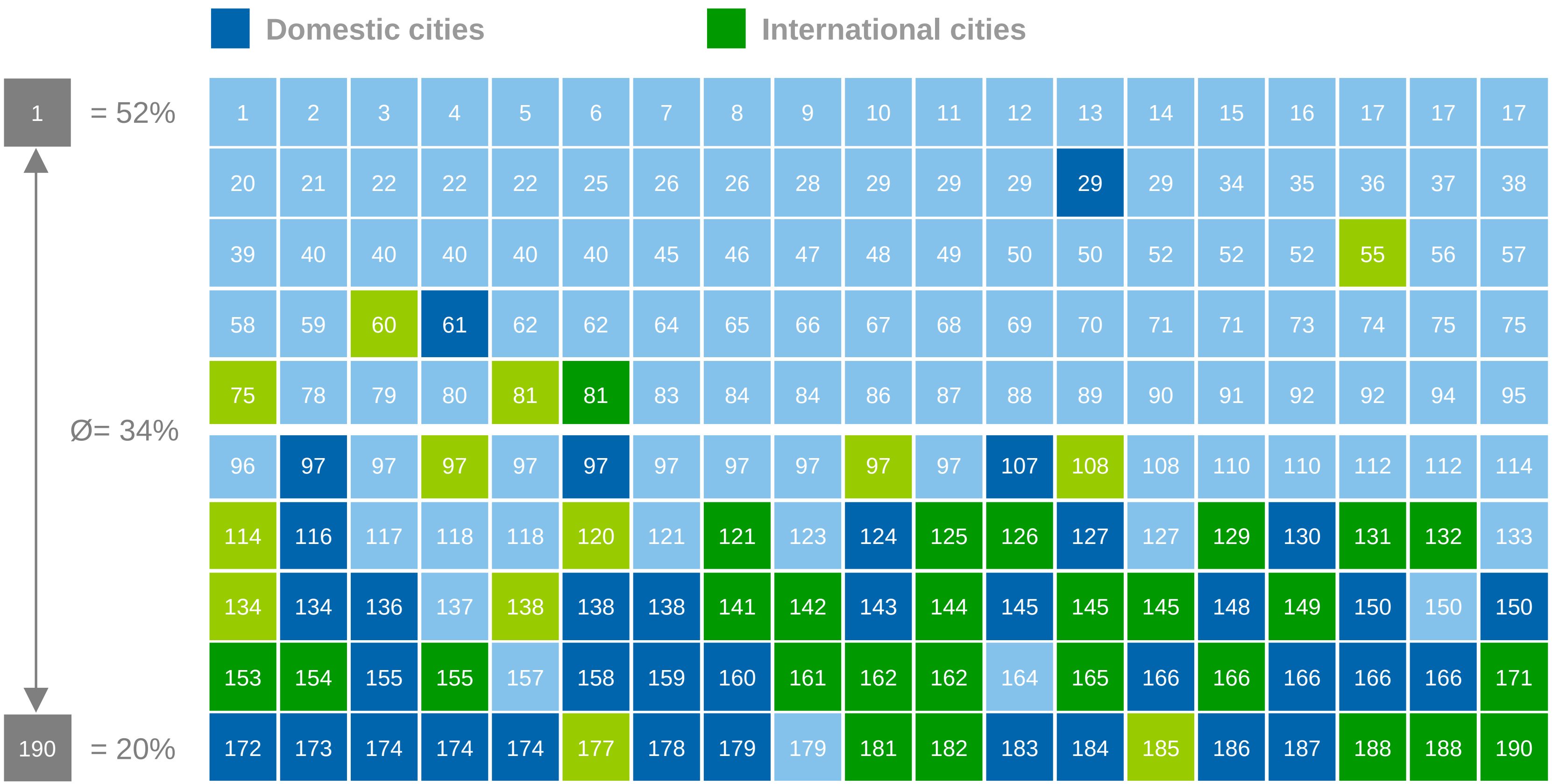
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	17	17
20	21	22	22	22	25	26	26	28	29	29	29	29	29	34	35	36	37	38
39	40	40	40	40	40	45	46	47	48	49	50	50	52	52	52	55	56	57
58	59	60	61	62	62	64	65	66	67	68	69	70	71	71	73	74	75	75
75	78	79	80	81	81	83	84	84	86	87	88	89	90	91	92	92	94	95
96	97	97	97	97	97	97	97	97	97	97	107	108	108	110	110	112	112	114
114	116	117	118	118	120	121	121	123	124	125	126	127	127	129	130	131	132	133
134	134	136	137	138	138	138	141	142	143	144	145	145	145	148	149	150	150	150
153	154	155	155	157	158	159	160	161	162	162	164	165	166	166	166	166	166	171
172	173	174	174	174	177	178	179	179	181	182	183	184	185	186	187	188	188	190

Base: all respondents (n = 1.000 per destination)
Indication of the rankings based on the transfer rate 2K (next 12 month)

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

Longer holidays: Domestic vs. intern. cities (12 months)

Base TR2: Willingness to visit the destination among those who like the destination



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Longer holidays: Domestic vs. intern. cities (12 months)

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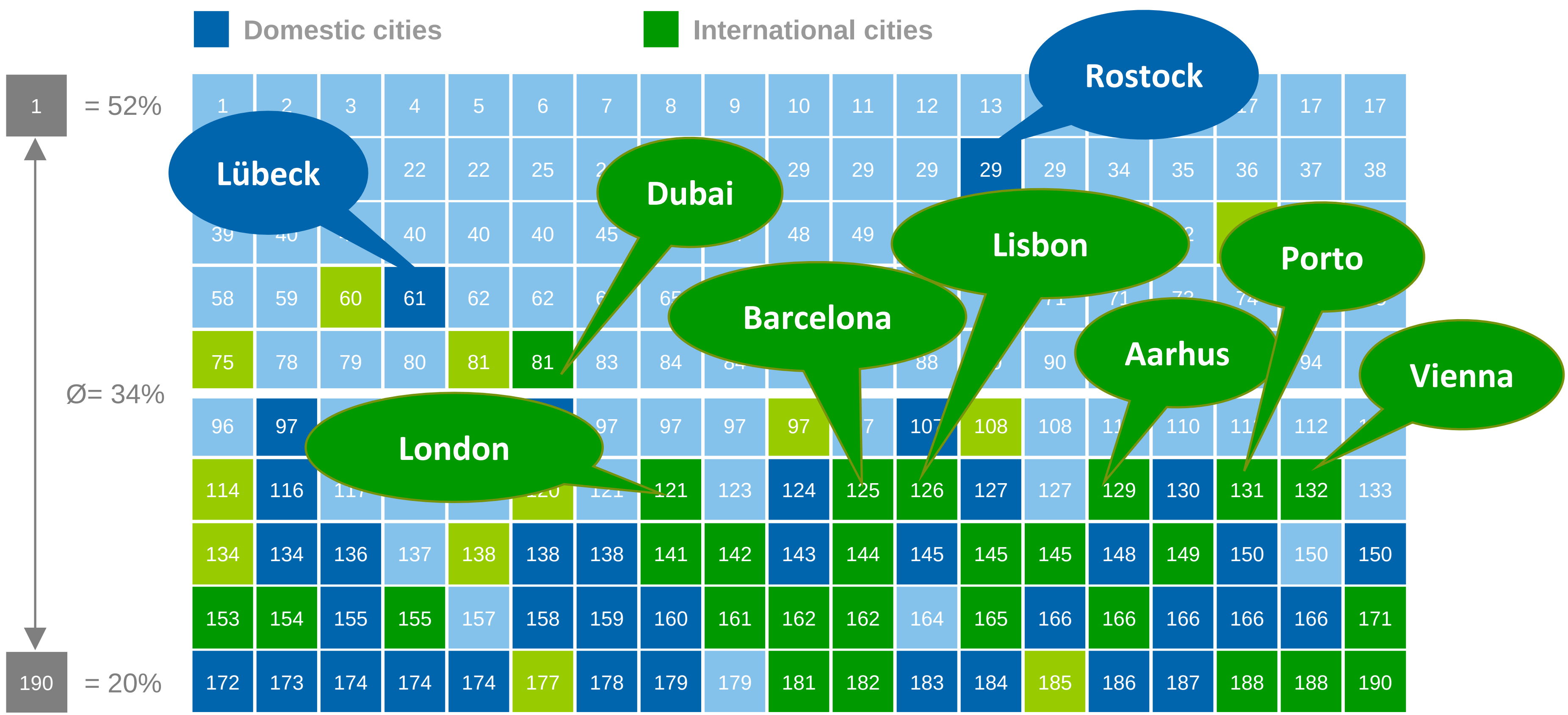


Base: all respondents (n = 1.000 per destination)
Indication of the rankings based on the transfer rate 2K (next 12 month)

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

Longer holidays: Domestic vs. intern. destinations (3 years)

Base TR2: Willingness to visit the destination among those who like the destination

Domestic destinations (150) International destinations (40)

1 = 74%

Ø= 54%

190 = 31%

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	16	18	19
20	21	22	22	24	25	26	27	28	28	28	31	31	33	34	35	35	35	38
39	39	41	42	43	44	44	44	44	48	49	50	50	52	53	54	54	56	57
58	59	60	60	60	60	64	64	66	67	67	69	69	71	72	73	73	73	76
76	78	78	80	81	82	82	84	85	86	86	88	89	89	91	92	92	94	95
96	96	98	99	99	101	102	102	102	105	106	107	108	109	110	111	112	112	114
114	114	117	118	118	118	121	121	123	124	125	125	125	128	128	130	131	132	133
133	133	133	133	133	133	133	133	133	143	144	145	146	147	148	149	150	151	152
152	154	155	156	156	158	159	160	161	162	163	164	165	166	167	168	169	170	171
172	173	174	175	175	177	178	179	180	181	181	183	184	185	186	187	188	189	190

Base: all respondents (n = 1.000 per destination)
Indication of the rankings based on the transfer rate 2K (next 12 month)

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

Longer holidays: Domestic vs. intern. cities (3 years)

Longer holidays: Domestic vs. intern. cities (3 years)

Base TR2: Willingness to visit the destination among those who like the destination

Domestic cities International cities

1 = 74%

Ø= 54%

190 = 31%

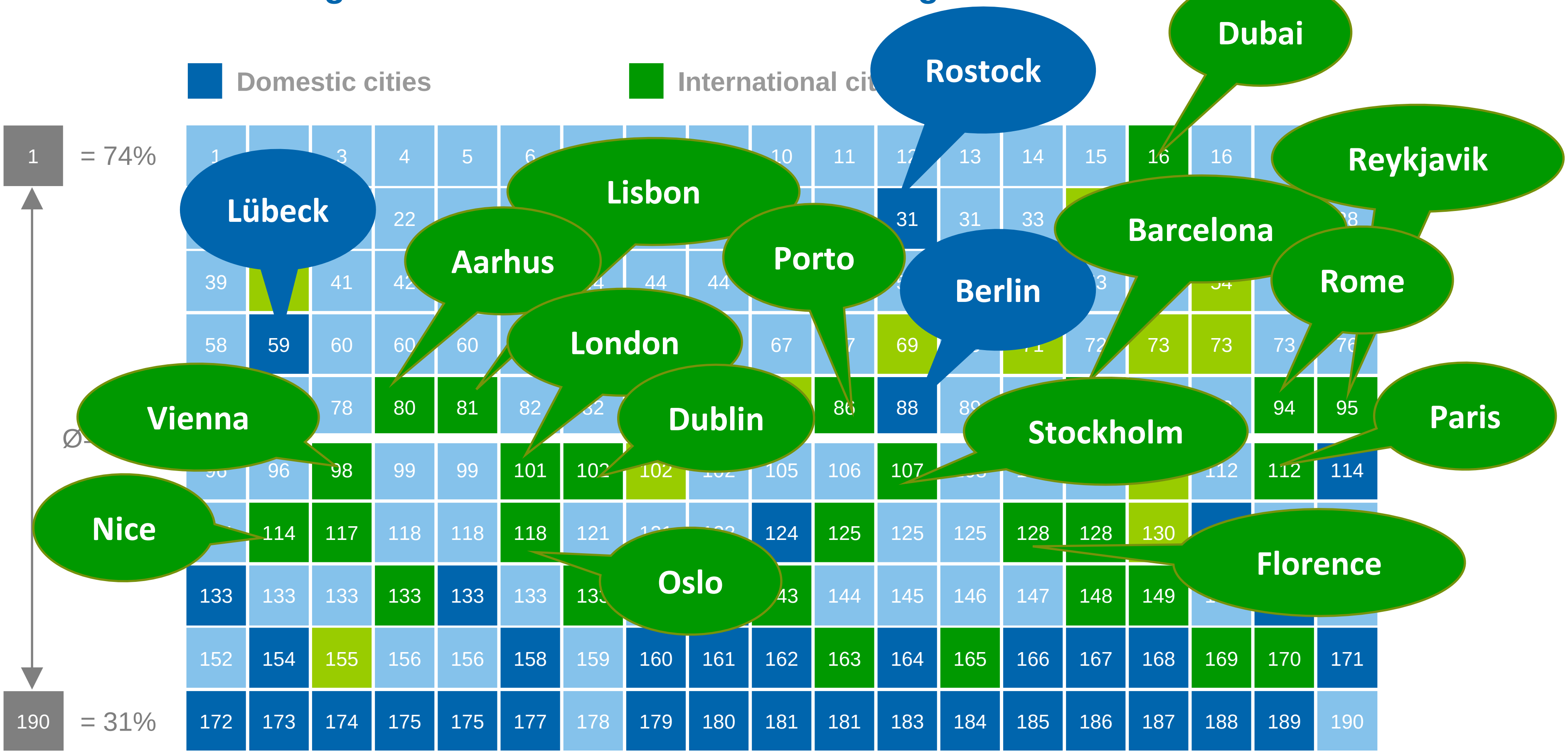
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	16	18	19
20	21	22	22	24	25	26	27	28	28	28	31	31	33	34	35	35	35	38
39	39	41	42	43	44	44	44	44	48	49	50	50	52	53	54	54	56	57
58	59	60	60	60	60	64	64	66	67	67	69	69	71	72	73	73	73	76
76	78	78	80	81	82	82	84	85	86	86	88	89	89	91	92	92	94	95
96	96	98	99	99	101	102	102	102	105	106	107	108	109	110	111	112	112	114
114	114	117	118	118	118	121	121	123	124	125	125	125	128	128	130	131	132	133
133	133	133	133	133	133	133	133	133	143	144	145	146	147	148	149	150	151	152
152	154	155	156	156	158	159	160	161	162	163	164	165	166	167	168	169	170	171
172	173	174	175	175	177	178	179	180	181	181	183	184	185	186	187	188	189	190

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

Base: all respondents (n = 1.000 per destination)
Indication of the rankings based on the transfer rate 2K (next 12 month)

Longer holidays: Domestic vs. intern. cities (3 years)

Base TR2: Willingness to visit the destination among those who like the destination



Base: all respondents (n = 1.000 per destination)
Indication of the rankings based on the transfer rate 2K (next 12 month)

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

Conclusion and outlook

General perspectives for city tourism from European source markets

In the 3-year perspective, the demand-based results for international city breaks make us feel cautiously optimistic:

- The fundamental interest in city breaks has not collapsed even during the pandemic.
- In terms of longer holidays abroad, city break enthusiasts in European source markets have extensive plans within the next 3 years.
- In the case of short trips abroad, plans are somewhat more restrained overall.

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

Additional observations for the source market Germany

- Visit preferences of Germans currently (12 months perspective) tend to **focus on domestic regions**.
- Cities (especially international ones) are **less present in their "relevant sets"** of holiday destinations**.**
- However, with a 3-year perspective, **visit preferences for cities are on the rise again** – especially for international cities, which are increasingly being considered again, particularly for longer holiday trips.

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

Challenges caused by current risk perception of potential holidaymakers

However, as long as the pandemic has not been overcome, the **COVID-19-related "strategies" of holiday planners** make it even more difficult to attract city travelers. For example,

- perceived hygiene and safety (still) play decisive roles in the selection of travel destinations or
- people prefer not to travel so far.

These aspects have a high relevance in all European source markets that we analysed with only minor differences and should be addressed in destination marketing.

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

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SAVE THE DATE for next events:

25.03.2021 I 10 hs for DMOs from DE, AT and CH in German

DB20-Webinar Ab in die Berge? In den Harz, die Wiener Alpen oder nach Südtirol? Die Wahrnehmung von Mittelgebirgen und Alpenregionen in Zeiten von Covid-19

Vortragssprache: Deutsch

20.04.2021 I 14 Uhr for DMOs from France in French

DB20-Webinar La Bretagne, la Provence ou les Alpes françaises ? Perception des destinations françaises dans le pays et à l'étranger

Langue de la conférence : français

May 2021 for DMOs from Spain in Spanish

DB20-Webinar ¿Islas, tierra firme o ciudades? La percepción de los destinos españoles en los principales mercados extranjeros

Idioma de la conferencia: español

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

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Thank you for your attention!

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