in cooperation with :

DESTINATION BRAND 20:

The perception of US American destinations in Europe in times of covid-19

Presentation of key results

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in cooperation with:

Destination Brand – a cooperative project

Destination Brand – a cooperative project

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

What can you expect from this webinar?

1. DESTINATION BRAND 20 at a glance
2. Presentation of selected results for **US American destinations**:
   - Comparison of general demand-side conditions in major tourism source markets
   - Perception of US American destinations in European source markets
3. Conclusion and outlook

DESTINATION BRAND 20

at a glance

DESTINATION BRAND 20: overview of the study design

Measurement of the
Brand Value

Souce markets
10

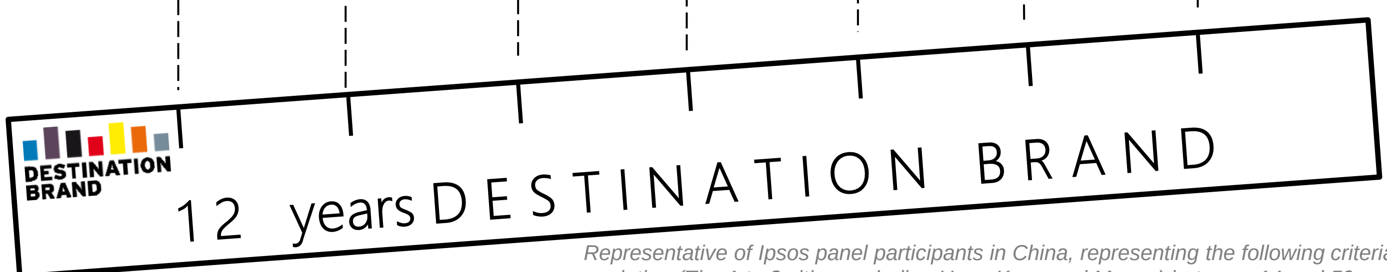
Online survey
Field work: end of Oct. to beginning of Dec. 20

Ipsos

Travel destinations
>190

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

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



** 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

Presentation of selected results for US American destinations

Demand-side conditions

General interest in different vacation activities

Question:

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

General interest in vacation activities – source market Germany

Ranking of considered vacation activities					
		% of cases			% of cases
1	Relaxing	78%	22	Culture / music festivals	35%
2	Nature	75%	23	Active sports	33%
3	**Culinary**	**71%**	24	Wine tour	32%
4	Swimming / Beach	66%	25	Traditional events	31%
5	**City break**	**63%**	26	Family	31%
6	Castles, palaces and cathedrals	60%	27	Thalasso offers	29%
7	Gardens / Parks	59%	28	Industrial culture	29%
8	Manor houses	58%	29	Health	26%
9	Hiking	49%	30	Barrier-free vacation	25%
10	**Culture**	**48%**	31	Water sports	25%
11	UNESCO world heritage sites	45%	32	Mountaineering	23%
12	Wellness	45%	33	Luxury	23%
13	Museums	43%	34	Winter sports	22%
14	**Vibrant, lively „Scene“**	**41%**	35	Study / educational offers	20%
15	Vacations in the countryside	41%	36	Mountainbike	19%
16	Shopping	40%	37	Luxury shopping	19%
17	Sustainable vacation trip	38%	38	Soccer	18%
18	Indigenous (native) peoples	37%	39	Climbing fixed mountain routes	16%
19	**Amusement parks**	**36%**	40	Sailing	15%
20	**Events**	**35%**	41	Motorcycling	15%
21	Cycling	35%	42	Volunteer work	14%

Base: all respondents in the source market Germany (n = 19,000)

Top-Two-Box: „5 = very interested“ to „1 = not at all interested“; indication in % of respondents

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

General interest in vacation activities – European source markets

Ranking of considered vacation activities									
									% of cases
1								Relaxing	78%
2								Nature	75%
3	3	2	5	1	1	3	6	Culinary	71%
4								Swimming / Beach	66%
5	4	3	2	3	3	1	3	City break	63%
6								Castles, palaces and cathedrals	60%
7								Gardens / Parks	59%
8								Manor houses	58%
9								Hiking	49%
10	10	7	7	4	8	7	7	Culture	48%
11								UNESCO world heritage sites	45%
12								Wellness	45%
13								Museums	43%
14	16	13	18	14	12	10	13	Vibrant, lively „Scene“	41%
15								Vacations in the countryside	41%
16								Shopping	40%
17								Sustainable vacation trip	38%
18								Indigenous (native) peoples	37%
19	15	15	23	18	16	22	20	Amusement parks	36%
20	19	17	17	11	14	18	16	Events	35%
21								Cycling	35%

Base: all respondents (n = minimum 1,000)

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

Top-Two-Box: „5 = very interested“ to „1 = not at all interested“; indication in % of respondents

General interest in vacation activities – European source markets + USA + CHN

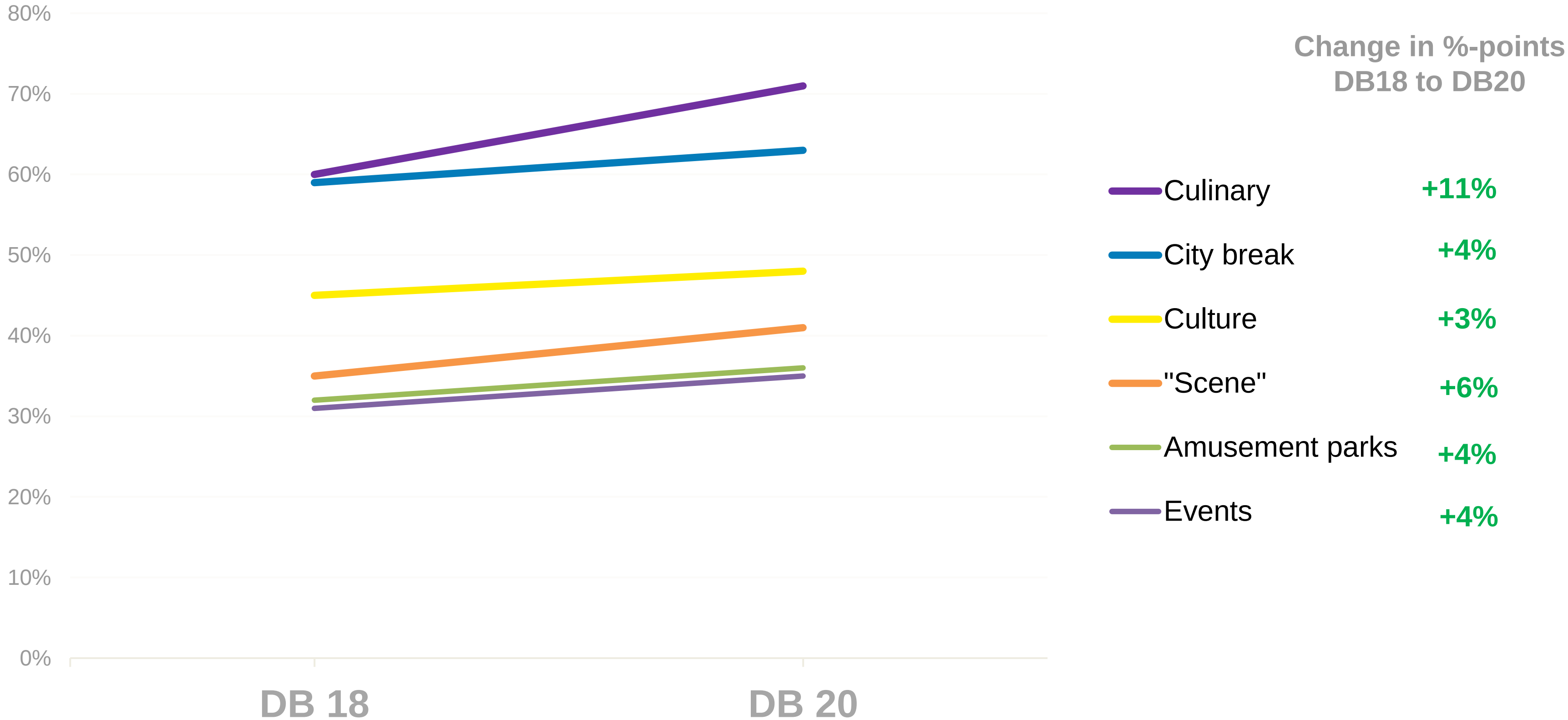
Ranking of considered vacation activities

											% der Fälle
1										Relaxing	78%
2										Nature	75%
3	3	2	5	1	1	3	6	5	1	Culinary	71%
4										Swimming / Beach	66%
5	4	3	2	3	3	1	3	9	13	City break	63%
6										Castles, palaces and cathedrals	60%
7										Gardens / Parks	59%
8										Manor houses	58%
9										Hiking	49%
10	10	7	7	4	8	7	7	6	14	Culture	48%
11										UNESCO world heritage sites	45%
12										Wellness	45%
13										Museums	43%
14	16	13	18	14	12	10	13	8	8	Vibrant, lively „Scene“	41%
15										Vacations in the countryside	41%
16										Shopping	40%
17										Sustainable vacation trip	38%
18										Indigenous (native) peoples	37%
19	15	15	23	18	16	22	20	14	5	Amusement parks	36%
20	19	17	17	11	14	18	16	12	22	Events	35%
21										Cycling	35%

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

Base: all respondents (n = minimum 1,000)
Top-Two-Box: „5 = very interested“ to „1 = not at all interested“; indication in % of respondents

General potential in vacation activities - source market Germany
Change between DB18 and DB20



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

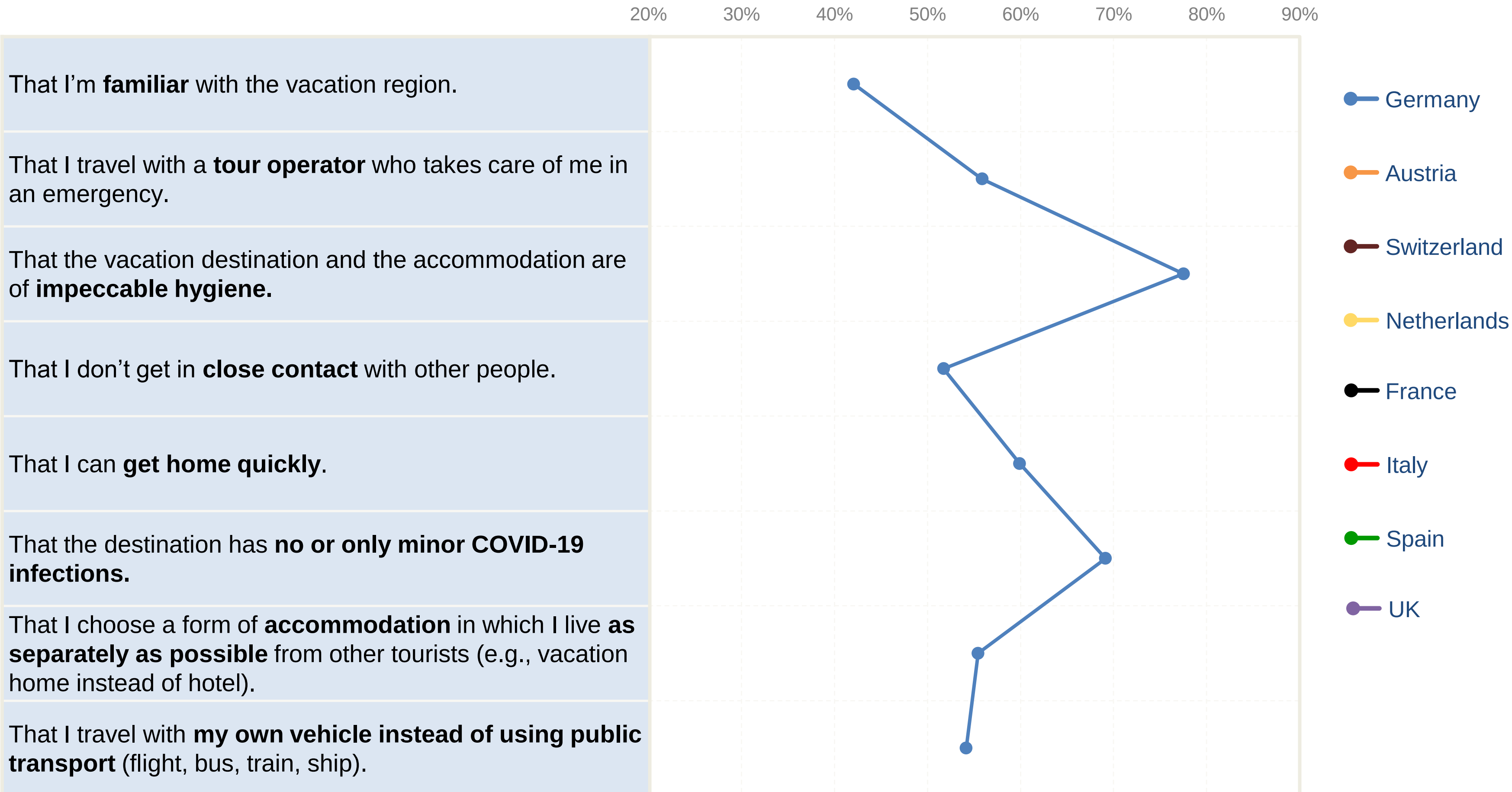
Source: inspektour (international) GmbH / DITF at the FH Westküste, 2010-2020

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

COVID-19:
„Strategies“ for future vacations

COVID-19: „Strategies“ for future vacations

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



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

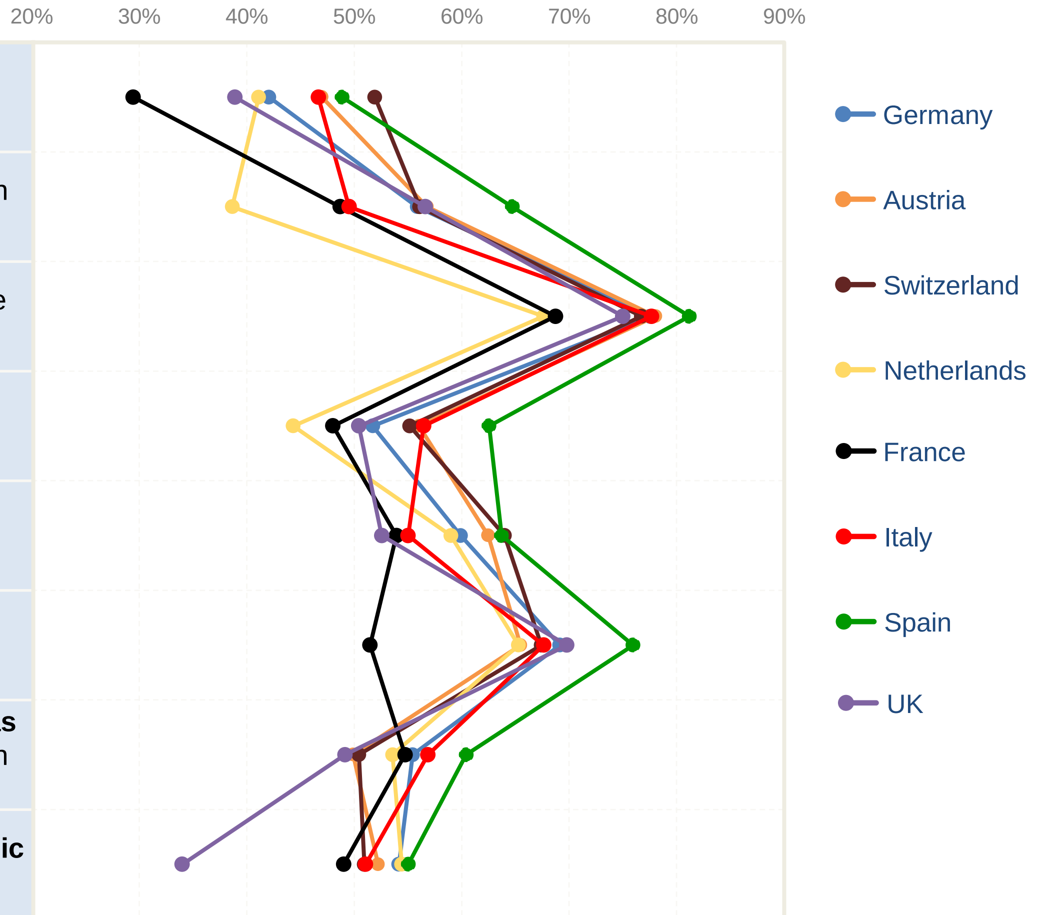
Source: DITF at the FH Westküste / inspektour (international) GmbH, 2020

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

COVID-19: „Strategies“ for future vacations

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

- That I'm **familiar** with the vacation region.
- That I travel with a **tour operator** who takes care of me in an emergency.
- That the vacation 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., vacation home instead of hotel).
- That I travel with **my own vehicle instead of using public transport** (flight, bus, train, ship).



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

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

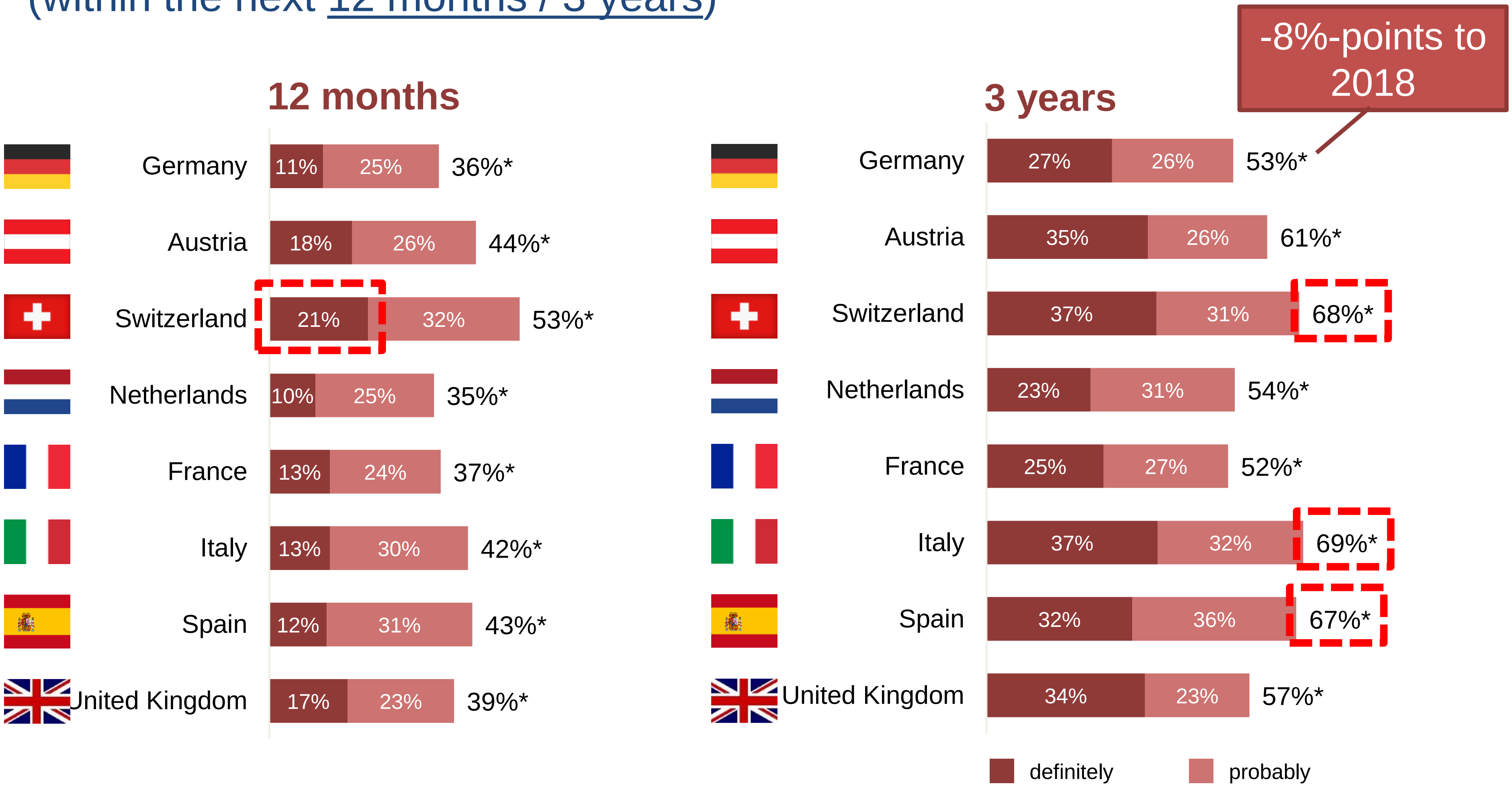
General intentions in major European markets to travel abroad

Intentions for:

Short trips (with 1-3 overnight stays)

Longer vacation trips (with 4 or more overnight stays)

General intentions to travel abroad for short trips (within the next 12 months / 3 years)



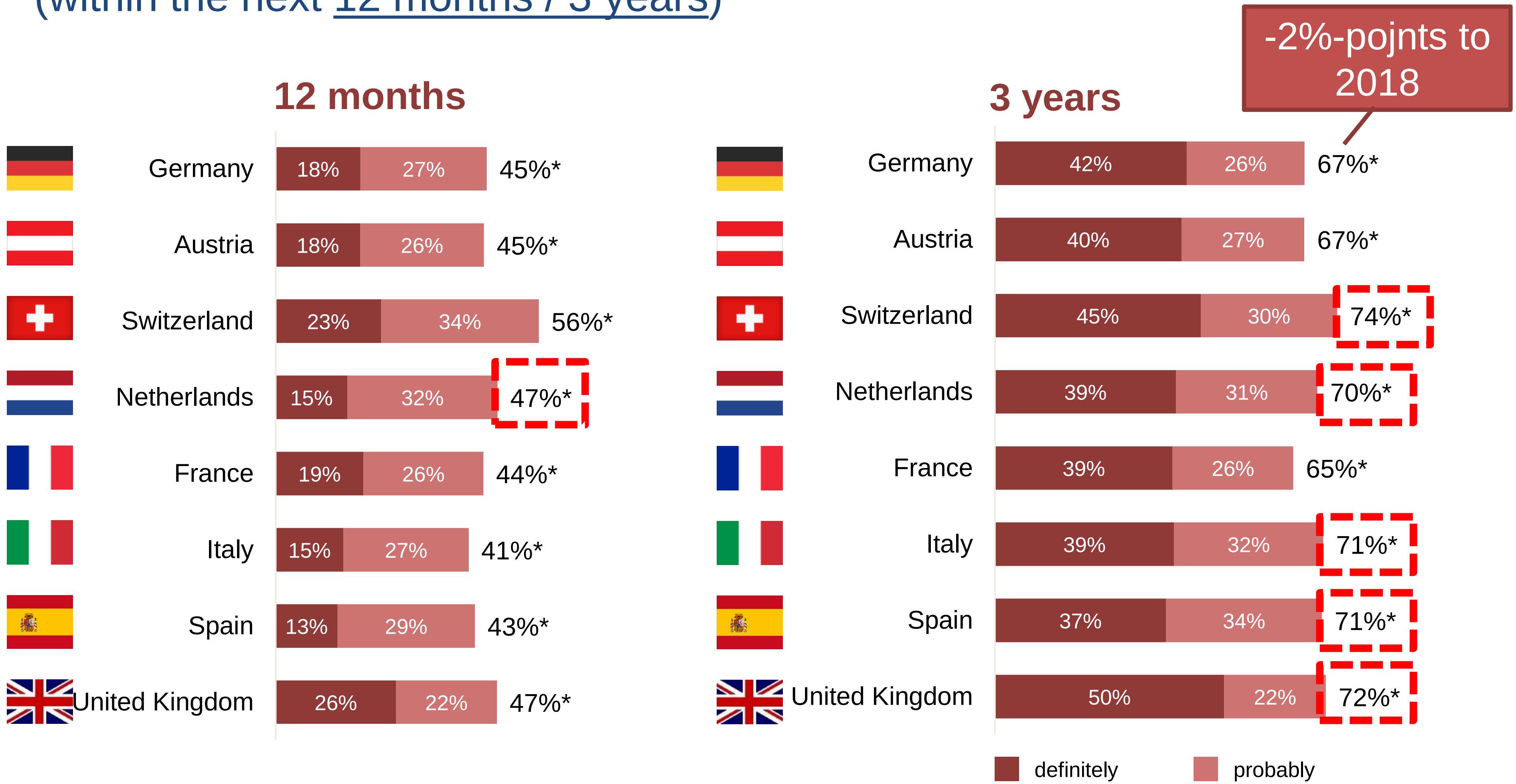
Base: all respondents (n = min. 1,000)

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

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 to travel abroad for longer vacation trips
(within the next 12 months / 3 years)



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

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

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.

Perception of US American destinations in Europe

Awareness (“Familiarity”) of US American destinations in key markets

(open question)

When considering

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

which foreign tourist destinations spring to your mind?

Unsupported awareness of US American destinations: TOP 5-Ranking per source market

	DE	AT	CH	NL	FR	IT	ES	UK		CHN
New York	1	1	1	1	1	1	1	1		2
Hawaii	2	2	2	2	3	4	3			1
Los Angeles	3	4	4		2	2	2			4
Florida	4	3		4				2		
Las Vegas	5		3		4			3		3
Miami					5	3	4			
Nebraska				3						
California			5	5		5		4		
Alaska		5					5			
Orlando								5		
Chicago										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

Awareness of <u>US American destinations</u> in the source market Germany

(open question)

Unsupported awareness of US American destinations: TOP 10-Ranking in Germany

DB20

Rank USA		Overall Ranking
1	New York	37
2	Hawaii	73
3	Los Angeles	94
4	Florida	116
5	Las Vegas	135
6	California	137
7	Miami	146
8	San Francisco	166
9	Alaska	221
10	Chicago	237

DB18

Rank USA		Overall Ranking
1	New York	30
2	Hawaii	67
3	Florida	84
4	Los Angeles	84
5	California	109
6	San Francisco	109
7	Las Vegas	123
8	Washington	140
9	Orlando	160
10	Alaska	216

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 international cities: TOP 20-Ranking in Germany

DB20

Ranking		Overall Ranking	N
1	Paris	9	1.218
2	London	12	1.002
3	Vienna	19	691
4	Rom	21	627
5	Amsterdam	22	625
6	Prague	23	569
7	Barcelona	32	416
8	New York	37	301
9	Dubai	42	232
10	Venice	46	181

Ranking		Overall Ranking	N
11	Madrid	53	159
12	Copenhagen	54	158
13	Lisbon	61	137
14	Stockholm	63	133
15	Budapest	72	110
16	Brussels	76	98
17	Dublin	77	94
18	Salzburg	77	94
19	Tokio	79	92
20	Zurich	82	86

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

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

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

Unsupported awareness of international country destinations: TOP 10-Ranking in Germany + UK

DB20 (Germany)

Rank	Country	Overall Ranking
1	Italy	1
2	Spain	2
3	Austria	3
4	France	4
5	Netherlands	5
6	Greece	6
7	Denmark	7
8	Switzerland	8
9	Turkey	10
10	Croatia	11

DB20 (UK)

Rank	Country	Overall Ranking
1	Spain	1
2	France	2
3	Italy	3
4	Greece	5
5	USA	6
6	Portugal	8
7	Germany	9
8	Canada	12
9	Australia	15
10	Turkey	16

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

Base: all respondents in the source market Germany + UK with valid responses (n = 15.631, n = 1,900)

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

Conclusion and outlook

General perspectives from European source markets

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

- The fundamental interest in different vacation activities has not collapsed even during the pandemic.
- In terms of longer vacations abroad, respondents 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 US American destinations

- Visit preferences currently (12 months perspective) tend to focus on domestic regions.
- Long-haul travel destinations are currently (12 months perspective) less present in their “relevant sets” of vacation destinations.
- However, with a 3-year perspective, visit preferences for international (also long-haul) destinations are on the rise again – especially for international cities, which are increasingly being considered again, particularly for longer holiday trips.
- Europeans are most aware of the following US American travel destinations: New York, Hawaii and Los Angeles.

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

Challenges caused by current risk perception of potential vacationmakers

However, as long as the pandemic has not been overcome, the COVID-19-related "strategies" of vacation planners make it even more difficult for long-haul destinations to attract European 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.

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

Next survey wave:
Destination Brand 21

What is the objective of this year's survey?

Following a first overview

and from June 2021 onwards, we will inform you about this year´s participation options

DESTINATION BRAND 21 I Evaluation of the theme competence

Measurement of the

Customer-oriented determination of the **theme competence** of destinations

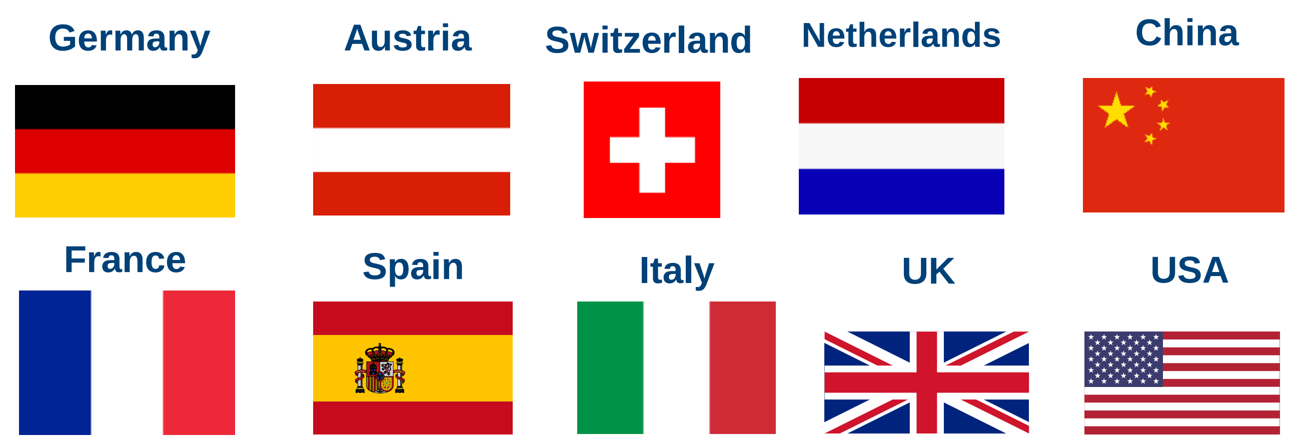
The following content focuses:

- Measurement of general interest in more than 40 vacation activities (independent of destination)

Evaluation of

- Theme suitability (Top of Mind – open question) per destination
- Theme competence (supported) per destination for 5 general vacation themes & 5 selectable special themes

in the source markets



Further evaluations:

Target group-analysis

Competitive analysis

Sociodemographic differentiations

Destination Brand 21 I Time schedule

Time schedule	
Registration:	From June to end of September 2021
Field work:	From mid October until beginning December 2021
Delivery of results:	First extract: beginning of February 2022 Delivery of full report: End of March 2022
Further information	
Results are delivered:	• By E-Mail • One individual report for each participating destination

From June 2021, we will inform you about this year's participation opportunities

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