





Theme competence of tourist destinations

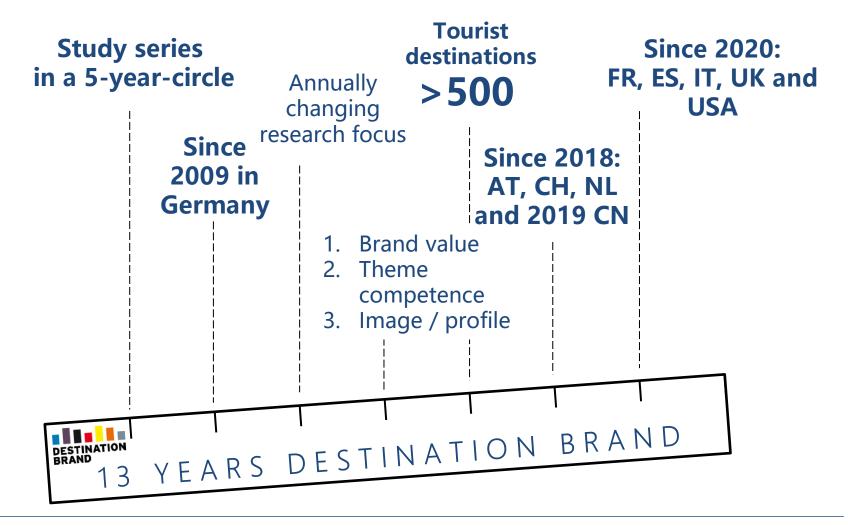
Presentation of selected key results I 3 March 2022 I Ellen Böhling

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DESTINATION BRAND: the study series at a glance





What can you expect from this webinar?

Brief introduction:

DESTINATION BRAND 21 at a glance

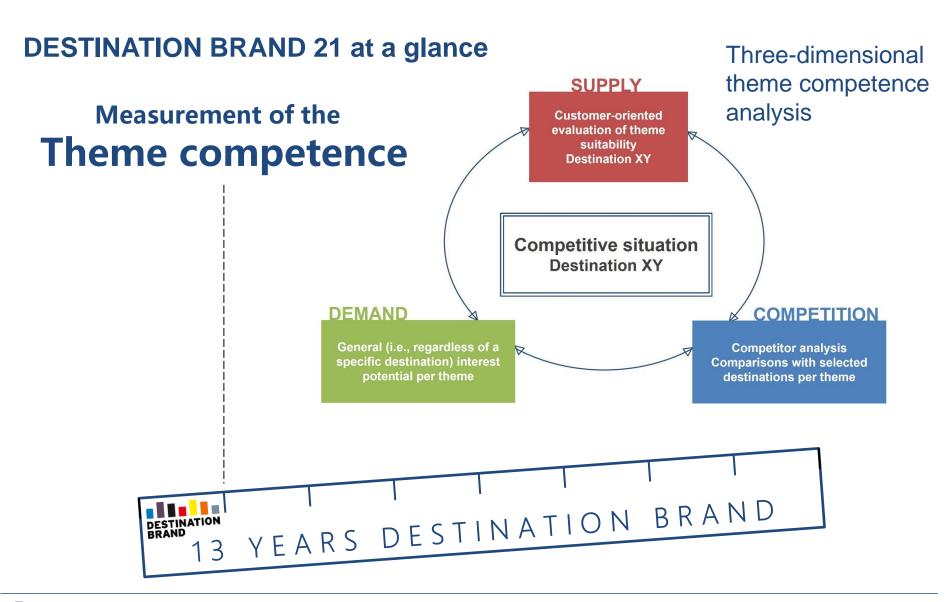
Presentation of first core results

Q&A session

DESTINATION BRAND 21 at a glance

FH Westküste









DESTINATION BRAND 21 at a glance



Representative of the Ipsos panel members in China covering the following characteristics: Chinese-speaking urban population (including the top city categories "Tier 1-3" without Hongkong and Macau) aged 14-59 years with Internet access, which according to additional preceding filter questions shows an affinity to travel abroad.

Presentation of selected key results

Demand-side conditions

Source market Germany: General interest potential

Question:

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





General interest potential – Source market Germany

| DESTINATION BRAND 21 | Ranking of the cor | sidered holiday activities with regard to | the gener | al interest potential | |
|-------------------------------|--------------------|---|------------|--|------------|
| Rank | % of cases | Rank | % of cases | Rank | % of cases |
| 1 Relaxation | 76% | 21 Countryside | 40% | 41 Bauhaus | 29% |
| 2 Nature | 70% | 22 Tradition and craft | 40% | 42 Barrier-free holiday trip | 29% |
| 3 Culinary | 63% | 23 Shopping | 39% | 43 Classical seaside resort architecture | 28% |
| 4 Regional products / spec | ialities 62% | 24 Museums | 38% | 44 Camping | 27% |
| 5 Swimming / beach | 62% | 25 UNESCO world heritage sites | 38% | 45 Industrial heritage | 27% |
| 6 City break | 56% | 26 Dark sky places | 37% | 46 Water sports | 27% |
| 7 Gardens / parks | 53% | 27 Lively places | 37% | 47 Luxury offers | 26% |
| 8 Castles | 52% | 28 Families | 36% | 48 Winter sports | 24% |
| 9 Water-based holiday acti | vities 52% | 29 Events | 35% | 49 Way of St. James | 23% |
| 10 Castles / gardens | 50% | 30 Culture- / music festivals | 34% | 50 Footsteps of Martin Luther | 23% |
| 11 (Small) city flair | 50% | 31 Contemp. history of the 20th century | 34% | 51 Holiday trip by bus | 23% |
| 12 Castles / mansions | 47% | 32 Sports | 34% | 52 Luxurious shopping | 22% |
| 13 Christmas markets | 47% | 33 Cycling | 33% | 53 Mountain biking | 22% |
| 14 Wellness | 46% | 34 Japanese culture / gastronomy | 32% | 54 Study / educational offers | 21% |
| 15 Hiking | 46% | 35 Wine tour | 32% | 55 Riding | 19% |
| 16 Beach lounges / beach b | ars 45% | 36 Fairy tales / legends | 32% | 56 Sailing | 18% |
| 17 Cosy winter holiday trip | 44% | 37 Film locations | 30% | 57 Inline skating / skating | 17% |
| 18 City break with active red | reation 43% | 38 Health | 30% | 58 Volunteer / voluntary work | 17% |
| 19 Sustainable trip | 41% | 39 Contemporary / Modern Culture | 29% | 59 Golf | 15% |
| 20 Culture | 41% | 40 Traditional folk events | 29% | | |

Base: all respondents in the source market Germany (n = 17,000)

Top-two-box on a scale from "5 = very interested" to "1 = not at all interested"; in % of respondents



Source: inspektour (international) GmbH, 2021





General interest potential – Source market Germany – DB18/DB21



| Ranking of the considered holiday activities with regard to the general interest potential Difference of DB21 to DB18 (in terms of top-two-box in %-pts.) | | | | | | | | | | | | | |
|--|-----------------------|---|-----------------------|--|-----------------------|--|--|--|--|--|--|--|--|
| Rank | Difference to DB18 | Rank | Difference to DB18 | Rank | Difference to DB18 | | | | | | | | |
| 1 Relaxation | +1% | 21 Countryside | +9% | 41 Bauhaus | | | | | | | | | |
| 2 Nature | +2% | 22 Tradition and craft | | 42 Barrier-free holiday trip | | | | | | | | | |
| 3 Culinary | +3% | 23 Shopping | +/-0% | 43 Classical seaside resort architecture | | | | | | | | | |
| 4 Regional products / specialities | | 24 Museums | | 44 Camping | | | | | | | | | |
| 5 Swimming / beach | +/-0% | 25 UNESCO world heritage sites | -1% | 45 Industrial heritage | +6% | | | | | | | | |
| 6 City break | -3% | 26 Dark sky places | | 46 Water sports | +7% | | | | | | | | |
| 7 Gardens / parks | +4% | 27 Lively places | +2% | 47 Luxury offers | +4% | | | | | | | | |
| 8 Castles | +/-0% | 28 Families | +9% | 48 Winter sports | +7% | | | | | | | | |
| 9 Water-based holiday activities | | 29 Events | +4% | 49 Way of St. James | | | | | | | | | |
| 10 Castles / gardens | | 30 Culture- / music festivals | | 50 Footsteps of Martin Luther | | | | | | | | | |
| 11 (Small) city flair | | 31 Contemp. history of the 20th century | | 51 Holiday trip by bus | | | | | | | | | |
| 12 Castles / mansions | | 32 Sports | +7% | 52 Luxurious shopping | | | | | | | | | |
| 13 Christmas markets | | 33 Cycling | +5% | 53 Mountain biking | +8% | | | | | | | | |
| 14 Wellness | +3% | 34 Japanese culture / gastronomy | | 54 Study / educational offers | +3% | | | | | | | | |
| 15 Hiking | +4% | 35 Wine tour | | 55 Riding | | | | | | | | | |
| 16 Beach lounges / beach bars | | 36 Fairy tales / legends | | 56 Sailing | | | | | | | | | |
| 17 Cosy winter holiday trip | | 37 Film locations | | 57 Inline skating / skating | | | | | | | | | |
| 18 City break with active recreation | | 38 Health | +7% | 58 Volunteer / voluntary work | | | | | | | | | |
| 19 Sustainable trip | +8% | 39 Contemporary / Modern Culture | | 59 Golf | | | | | | | | | |
| 20 Culture | -4% | 40 Traditional folk events | | | | | | | | | | | |

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

Top-two-box on a scale from "5 = very interested" to "1 = not at all interested"; in % of respondents



Source: inspektour (international) GmbH / FH Westküste, 2018 / 2021





General interest potential – Source market Germany – DB20/DB21



| Ranking of the considered holiday activities with regard to the general interest potential Difference of DB21 to DB20 (in terms of top-two-box in %-pts.) | | | | | | | | | | | | | |
|--|-----------------------|---|-----------------------|--|-----------------------|--|--|--|--|--|--|--|--|
| Rank | Difference to DB20 | Rank | Difference to DB20 | Rank | Difference to DB20 | | | | | | | | |
| 1 Relaxation | -2% | 21 Countryside | -1% | 41 Bauhaus | | | | | | | | | |
| 2 Nature | -5% | 22 Tradition and craft | | 42 Barrier-free holiday trip | +4% | | | | | | | | |
| 3 Culinary | -8% | 23 Shopping | -1% | 43 Classical seaside resort architecture | | | | | | | | | |
| 4 Regional products / specialities | | 24 Museums | -5% | 44 Camping | | | | | | | | | |
| 5 Swimming / beach | -4% | 25 UNESCO world heritage sites | -7% | 45 Industrial heritage | -2% | | | | | | | | |
| 6 City break | -7% | 26 Dark sky places | | 46 Water sports | +2% | | | | | | | | |
| 7 Gardens / parks | -6% | 27 Lively places | -4% | 47 Luxury offers | +3% | | | | | | | | |
| 8 Castles | -8% | 28 Families | +5% | 48 Winter sports | +2% | | | | | | | | |
| 9 Water-based holiday activities | | 29 Events | +/-0% | 49 Way of St. James | | | | | | | | | |
| 10 Castles / gardens | -8% | 30 Culture- / music festivals | -1% | 50 Footsteps of Martin Luther | | | | | | | | | |
| 11 (Small) city flair | | 31 Contemp. history of the 20th century | | 51 Holiday trip by bus | | | | | | | | | |
| 12 Castles / mansions | | 32 Sports | +1% | 52 Luxurious shopping | +3% | | | | | | | | |
| 13 Christmas markets | | 33 Cycling | -2% | 53 Mountain biking | +3% | | | | | | | | |
| 14 Wellness | +1% | 34 Japanese culture / gastronomy | | 54 Study / educational offers | +1% | | | | | | | | |
| 15 Hiking | -3% | 35 Wine tour | +/-0% | 55 Riding | | | | | | | | | |
| 16 Beach lounges / beach bars | | 36 Fairy tales / legends | | 56 Sailing | +3% | | | | | | | | |
| 17 Cosy winter holiday trip | | 37 Film locations | | 57 Inline skating / skating | | | | | | | | | |
| 18 City break with active recreation | | 38 Health | +4% | 58 Volunteer / voluntary work | +3% | | | | | | | | |
| 19 Sustainable trip | +3% | 39 Contemporary / Modern Culture | | 59 Golf | | | | | | | | | |
| 20 Culture | -7% | 40 Traditional folk events | -2% | | | | | | | | | | |

Base: all respondents in the source market Germany (n = min. 17,000)

Top-two-box on a scale from "5 = very interested" to "1 = not at all interested"; in % of respondents



Source: inspektour (international) GmbH / FH Westküste, 2020 / 2021





| DESTINA BRAND | Ranking of the considered holiday activities with regard to the general interest potential Base of comparison: Ranking of the holiday activities in DB21 | | | | | | | | | | | | |
|------------------|---|---------|-------|------|-------|----------|---------|--|----|------------|-----------------------------------|--|--|
| | <u> </u> | | = | Dase | | ilipai k | SUII. K | | | ★ ; | Uniday activities in DB21 | | |
| 1 | | | | | | | | | | | Relaxation | | |
| 2 | 2 | 4 | 3 | 11 | 10 | 4 | 3 | | 3 | 3 | Nature | | |
| 3 | 3 | 2 | 6 | 2 | 7 | 3 | 6 | | 6 | 1 | Culinary | | |
| 4 | | | | | | | | | | | Regional products / specialities* | | |
| 5 | | | | | | | | | | | Swimming / beach | | |
| 6 | 5 | 3 | 2 | 3 | 1 | 1 | 2 | | 18 | 16 | City break | | |
| 7 | | | | | | | | | | | Gardens / parks | | |
| 8 | | | | | | | | | | | Castles | | |
| 9 | | | | | | | | | | | Water-based holiday activities | | |
| 10 | | | ımber | | | | | | | | Castles / gardens | | |
| 11 | | | holid | | | | | | | | (Small) city flair | | |
| 12 | | K | er so | urce | mark | (et: | | | | | Castles / mansions | | |
| 13 | | | Ge | rman | y: 59 | | | | | | Christmas markets | | |
| 14 | | All oth | | | | ts: 46 | -47 | | | | Wellness | | |
| 15 | | | | | | | | | | | Hiking | | |
| 16 | | | | | | | | | | | Beach lounges / beach bars** | | |
| 17 | | | | | | | | | | | Cosy winter holiday trip** | | |
| 18 | | | | | | | | | | | City break with active recreation | | |
| 19 | | | | | | | | | | | Sustainable trip | | |
| 20 | 16 | 11 | 14 | 9 | 13 | 10 | 12 | | 11 | 18 | Culture | | |
| 32 | 17 | 28 | 30 | 30 | 36 | 35 | 37 | | 41 | 39 | Sports | | |

^{*} Holiday activity was surveyed exclusively in the source markets Germany and Spain.

Base: all respondents in the respective source markets (n = min. 1,000)



^{**} Holiday activity was surveyed exclusively in the source market Germany. Source: inspektour (international) GmbH, 2021





| DESTINA BRAND | ation 21 | Ranking of the considered holiday activities with regard to the general interest potential Base of comparison: Ranking of the holiday activities in DB21 | | | | | | | | | | |
|------------------|-------------|--|----|----|----|----|----|--|----|-------------|-----------------------------------|--|
| | | + | | | | 撤 | | | | * ;: | | |
| 1 | 1 | 1 | 1 | 1 | | | 1 | | 1 | | Relaxation | |
| 2 | 2 | 4 | 3 | 11 | 10 | 4 | 3 | | 3 | 3 | Nature | |
| 3 | 3 | 2 | 6 | 2 | 7 | 3 | 6 | | 6 | 1 | Culinary | |
| 4 | | | | | | | | | | | Regional products / specialities* | |
| 5 | | | | | | | | | | | Swimming / beach | |
| 6 | 5 | 3 | 2 | 3 | 1 | 1 | 2 | | 18 | 16 | City break | |
| 7 | | | | | | | | | | | Gardens / parks | |
| 8 | | | | | | | | | | | Castles | |
| 9 | | | | | | | | | | | Water-based holiday activities | |
| 10 | | | | | | | | | | | Castles / gardens | |
| 11 | | | | | | | | | | | (Small) city flair | |
| 12 | | | | | | | | | | | Castles / mansions | |
| 13 | | | | | | | | | | | Christmas markets | |
| 14 | | | | | | | | | | | Wellness | |
| 15 | | | | | | | | | | | Hiking | |
| 16 | | | | | | | | | | | Beach lounges / beach bars** | |
| 17 | | | | | | | | | | | Cosy winter holiday trip** | |
| 18 | | | | | | | | | | | City break with active recreation | |
| 19 | | | | | | | | | | | Sustainable trip | |
| 20 | 16 | 11 | 14 | 9 | 13 | 10 | 12 | | 11 | 18 | Culture | |
| 32 | 17 | 28 | 30 | 30 | 36 | 35 | 37 | | 41 | 39 | Sports | |

^{*} Holiday activity was surveyed exclusively in the source markets Germany and Spain.

Base: all respondents in the respective source markets (n = min. 1,000)



^{**} Holiday activity was surveyed exclusively in the source market Germany. Source: inspektour (international) GmbH, 2021





| DESTINA BRAND | TION | Ranki | ng of t | | | | | | | | egard to the general interest potential |
|------------------|----------|-------|---------|------|--------|--------|---------|-----|--------|-------------|---|
| | <u> </u> | ٠ | | Base | or cor | mparis | son: Ra | ank | ing or | tne n ★; | oliday activities in DB21 |
| 1 | | | | | | 2 | | | | 2 | Relaxation |
| 2 | 2 | 4 | 3 | 11 | 10 | 4 | 3 | | 3 | 3 | Nature |
| 3 | 3 | 2 | 6 | 2 | 7 | 3 | 6 | | 6 | 1 | Culinary |
| 4 | | | | | | | | | | | Regional products / specialities* |
| 5 | | | | | | | | | | | Swimming / beach |
| 6 | 5 | 3 | 2 | 3 | 1 | 1 | 2 | | 18 | 16 | City break |
| 7 | | | | | | | | | | | Gardens / parks |
| 8 | | | | | 2 | | | | | | Castles |
| 9 | | | | | | | | | | | Water-based holiday activities |
| 10 | | | | | | | | | 2 | | Castles / gardens |
| 11 | | | | | | | | | | | (Small) city flair |
| 12 | | | | | | | | | | | Castles / mansions |
| 13 | | | | | | | | | | | Christmas markets |
| 14 | | | | | | | | | | | Wellness |
| 15 | | | | | | | | | | | Hiking |
| 16 | | | | | | | | | | | Beach lounges / beach bars** |
| 17 | | | | | | | | | | | Cosy winter holiday trip** |
| 18 | | | | | | | | | | | City break with active recreation |
| 19 | | | | | | | | | | | Sustainable trip |
| 20 | 16 | 11 | 14 | 9 | 13 | 10 | 12 | | 11 | 18 | Culture |
| 32 | 17 | 28 | 30 | 30 | 36 | 35 | 37 | | 41 | 39 | Sports |

^{*} Holiday activity was surveyed exclusively in the source markets Germany and Spain.

Base: all respondents in the respective source markets (n = min. 1,000)



^{**} Holiday activity was surveyed exclusively in the source market Germany. Source: inspektour (international) GmbH, 2021





| DESTINA BRAND | ATION | Ranki | ing of t | | | | | | | | egard to the general interest potential oliday activities in DB21 |
|------------------|----------|-------|----------|------|----|----|----------|---|----|--------------------------|---|
| | <u> </u> | ٠ | | Dase | | # | SOII. Ka | | | onday activities in DB21 | |
| 1 | | | | | | | | | | | Relaxation |
| 2 | 2 | 4 | 3 | 11 | 10 | 4 | 3 | | 3 | 3 | Nature |
| 3 | 3 | 2 | 6 | 2 | 7 | 3 | 6 | | 6 | 1 | Culinary |
| 4 | | | | | | | | | | | Regional products / specialities* |
| 5 | | | | | | | | | | | Swimming / beach |
| 6 | 5 | 3 | 2 | 3 | 1 | 1 | 2 | • | 18 | 16 | City break |
| 7 | | | | | | | | | | | Gardens / parks |
| 8 | | | | | | | | | | | Castles |
| 9 | | | | | | | | | | | Water-based holiday activities |
| 10 | | | | | 3 | | | | | | Castles / gardens |
| 11 | | | | | | | | | | | (Small) city flair |
| 12 | | | | | | | | | | | Castles / mansions |
| 13 | | | | | | | | | | | Christmas markets |
| 14 | | | | | | | | | | | Wellness |
| 15 | | | | | | | | | | | Hiking |
| 16 | | | | | | | | | | | Beach lounges / beach bars** |
| 17 | | | | | | | | | | | Cosy winter holiday trip** |
| 18 | | | | | | | | | | | City break with active recreation |
| 19 | | | | | | | | | | | Sustainable trip |
| 20 | 16 | 11 | 14 | 9 | 13 | 10 | 12 | | 11 | 18 | Culture |
| 32 | 17 | 28 | 30 | 30 | 36 | 35 | 37 | 4 | 41 | 39 | Sports |

^{*} Holiday activity was surveyed exclusively in the source markets Germany and Spain.

Base: all respondents in the respective source markets (n = min. 1,000)



^{**} Holiday activity was surveyed exclusively in the source market Germany. Source: inspektour (international) GmbH, 2021





| DESTINA BRAND | ATION | Ranki | ng of t | he co | | | | | | gard to the general interest potential |
|---------------|-------|-------|---------|-------|-----|--------|-----|--------|--------|--|
| | 21 | | | | Bas | e of c | | n: Top | -two-l | box in % in DB21 |
| | | | | | | 機 | | 10000 | ^ e | |
| | | | | | | | | | | Relaxation |
| 70% | 73% | 62% | 59% | 54% | 66% | 73% | 58% | 60% | 80% | Nature |
| 63% | 68% | 67% | 48% | 67% | 68% | 74% | 55% | 55% | 82% | Culinary |
| | | | | | | | | | | Regional products / specialities* |
| | | | | | | | | | | Swimming / beach |
| 56% | 62% | 67% | 61% | 67% | 78% | 77% | 65% | 45% | 68% | City break |
| | | | | | | | | | | Gardens / parks |
| | | | | | | | | | | Castles |
| | | | | | | | | | | Water-based holiday activities |
| | | | | | | | | | | Castles / gardens |
| | | | | | | | | | | (Small) city flair |
| | | | | | | | | | | Castles / mansions |
| | | | | | | | | | | Christmas markets |
| | | | | | | | | | | Wellness |
| | | | | | | | | | | Hiking |
| | | | | | | | | | | Beach lounges / beach bars** |
| | | | | | | | | | | Cosy winter holiday trip** |
| | | | | | | | | | | City break with active recreation |
| | | | | | | | | | | Sustainable trip |
| 41% | 44% | 50% | 39% | 57% | 58% | 66% | 48% | 48% | 66% | Culture |
| 34% | 43% | 33% | 28% | 32% | 35% | 37% | 22% | 23% | 52% | Sports |

^{*} Holiday activity was surveyed exclusively in the source markets Germany and Spain.

Base: all respondents in the respective source markets (n = min. 1,000)



^{**} Holiday activity was surveyed exclusively in the source market Germany. Source: inspektour (international) GmbH, 2021





| DESTINA BRAND | TION 21 | Ranki | ng of t | | | | | | | gard to the general interest potential of top-two-box in %-pts.) |
|------------------|------------|-------|---------|-------|------|----------|-------|-------|-------|--|
| | | • | | | | * | | | *} | |
| | | | | | | | | | | Relaxation |
| -5% | -1% | -10% | +/-0% | +/-0% | +2% | +4% | -8% | -4% | -2% | Nature |
| -8% | -3% | -10% | +/-0% | -4% | -4% | +3% | -2% | -3% | +/-0% | Culinary |
| | | | | | | | | | | Regional products / specialities* |
| | | | | | | | | | | Swimming / beach |
| -7% | -6% | -8% | -1% | -3% | -3% | +1% | +/-0% | -5% | +2% | City break |
| | | | | | | | | | | Gardens / parks |
| | | | | | | | | | | Castles |
| | | | | | | | | | | Water-based holiday activities |
| | | | | | | | | | | Castles / gardens |
| | | | | | | | | | | (Small) city flair |
| | | | | | | | | | | Castles / mansions |
| | | | | | | | | | | Christmas markets |
| | | | | | | | | | | Wellness |
| | | | | | | | | | | Hiking |
| | | | | | | | | | | Beach lounges / beach bars** |
| | | | | | | | | | | Cosy winter holiday trip** |
| | | | | | | | | | | City break with active recreation |
| | | | | | | | | | | Sustainable trip |
| -7% | -10% | -10% | -5% | -7% | -4% | -1% | -8% | -7% | +/-0% | Culture |
| +1% | +4% | -10% | +/-0% | +4% | +12% | +11% | +1% | +/-0% | +3% | Sports |

^{*} Holiday activity was surveyed exclusively in the source markets Germany and Spain.

Base: all respondents in the respective source markets (n = min. 1,000)



^{**} Holiday activity was surveyed exclusively in the source market Germany. Source: inspektour (international) GmbH, 2021

COVID-19: "Strategies" for future holidays





COVID-19: "Strategies" for future holidays Question: "What are you going to focus on in the future concerning holiday trips?"

20% 30% 40% 50% 60% 70% 80% 90%

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**.

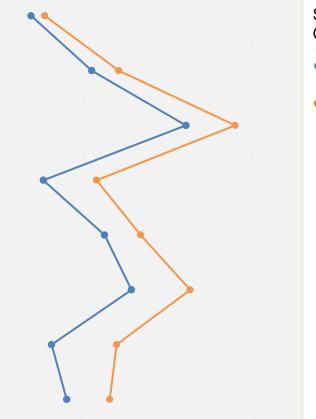
That I don't get in **close contact** with other people.

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).



Source market Germany:

Destination Brand 21

Destination Brand 20

Base: all respondents in the source market Germany (n = min. 17,000) Top-two-box on a scale from "5 = I fully agree" to "1 = I fully disagree"; in % of respondents





COVID-19: "Strategies" for future holidays Question: "What are you going to focus on in the future concerning holiday trips?"

20% 30% 40% 50% 60% 70% 80% 90%

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**.

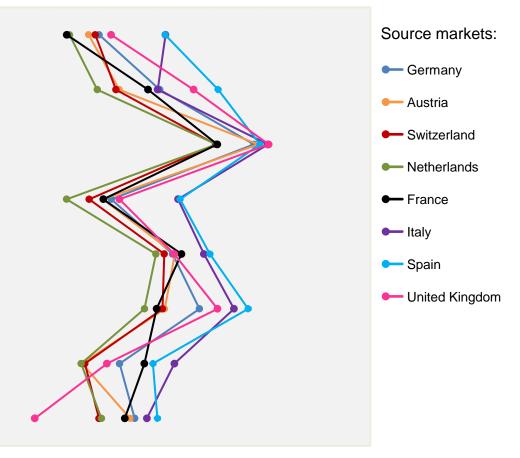
That I don't get in **close contact** with other people.

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: all respondents in the respective source markets (n = min. 1,000) Top-two-box on a scale from "5 = I fully agree" to "1 = I fully disagree"; in % of respondents



Source: inspektour (international) GmbH, 2021





COVID-19: "Strategies" for future holidays Question: "What are you going to focus on in the future concerning holiday trips?"

20% 30% 40% 50% 60% 70% 80% 90%

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**.

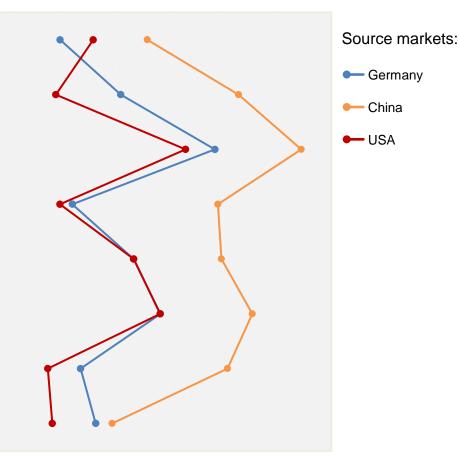
That I don't get in **close contact** with other people.

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: all respondents in the respective source markets (n = min. 1,000) Top-two-box on a scale from "5 = I fully agree" to "1 = I fully disagree"; in % of respondents



Source: inspektour (international) GmbH, 2021

General intention to travel abroad in major European markets + USA and China

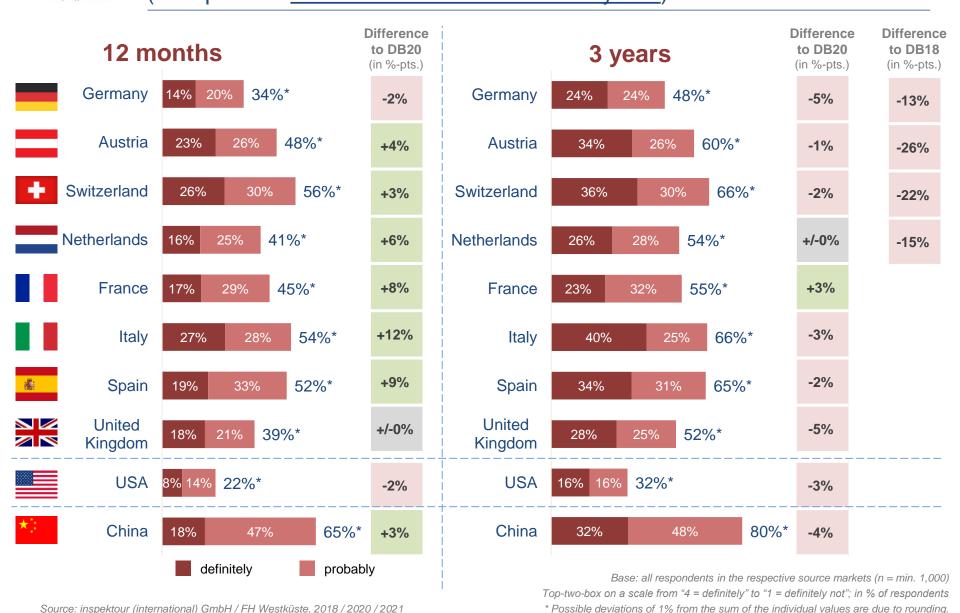
Intention for:

Short trips (with 1-3 overnight stays)
Longer holiday trips (with 4 or more overnight stays)



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



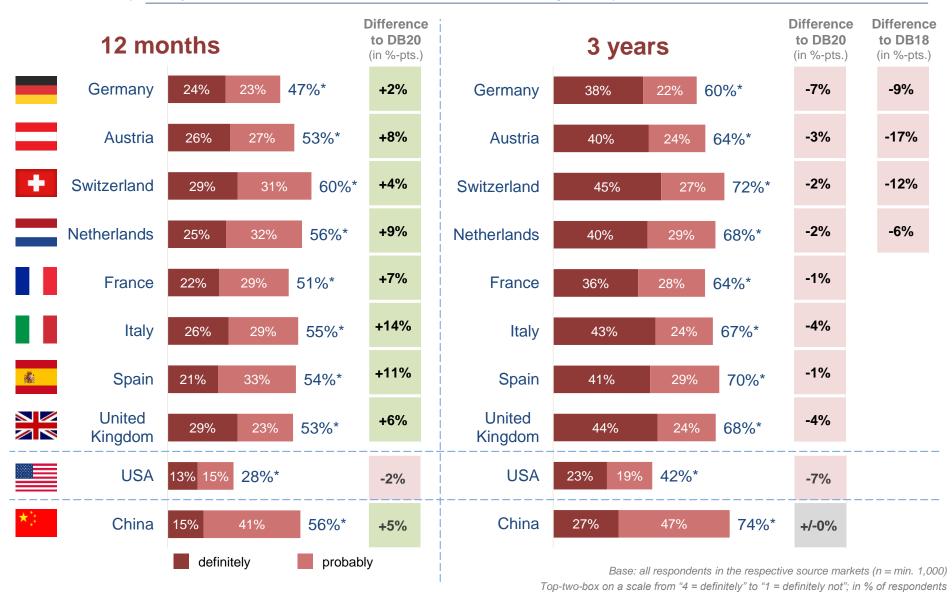


Scientific advisory:



General intention to travel abroad for longer holiday trips inspektour

(Comparison within the next 12 months / 3 years)



Source: inspektour (international) GmbH / FH Westküste, 2018 / 2020 / 2021

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

Source market comparison: Unsupported theme competence (top of mind)

Question:

Please imagine that you intend to go on a "culinary trip".

Which international tourist destinations
(countries, cities, regions etc.) do you consider
particularly suitable for this purpose?





TOP 5 Top of mind international tourist destinations: Particularly suitable for a "culinary trip"

| | DE | AT | СН | NL | FR | IT | ES | UK | US | CN |
|----------|----|----|----|----|----|----|----|----|----|----|
| Italy | 1 | 1 | 1 | 1 | 1 | | 1 | 1 | 1 | 5 |
| France | 2 | 2 | 2 | 2 | | 2 | 2 | 2 | 2 | 3 |
| Spain | 3 | 3 | 3 | 3 | 2 | 1 | | 3 | 4 | |
| Greece | 4 | 4 | 4 | 5 | 4 | 4 | | 5 | | |
| Austria | 5 | | | | | | | | | |
| Croatia | | 4 | | | | | | | | |
| Germany | | | 4 | 4 | | | | | | |
| Japan | | | | | 3 | 5 | 5 | | | 1 |
| Morocco | | | | | 5 | | | | | |
| Paris | | | | | | 3 | 3 | 4 | 3 | |
| Portugal | | | | | | | 3 | | | |
| Mexico | | | | | | | | | 5 | |
| Thailand | | | | | | | | | | 2 |
| Korea | | | | | | | | | | 4 |

Base: all respondents in the respective source markets with valid responses (n = min. 379) Indication of the rankings on the basis of the responses submitted





TOP 5 Top of mind <u>international</u> tourist destinations: Particularly suitable for an "active sports holiday"

| | DE | AT | СН | NL | FR | IT | ES | UK | US | CN |
|-------------|----|----|----|----|----|----|----|----|----|----|
| Austria | 1 | | 2 | 1 | | 5 | | | | |
| Italy | 2 | 1 | 1 | | 3 | | 1 | 5 | 3 | |
| Spain | 3 | 5 | 5 | 5 | 1 | 1 | | 3 | 1 | |
| Switzerland | 4 | 4 | | 4 | | 3 | 4 | 2 | | |
| France | 5 | | 3 | 2 | | 2 | 2 | 1 | | |
| Croatia | | 2 | | | | | | | | |
| Germany | | 3 | 4 | 3 | | 4 | 3 | | 5 | |
| USA | | | | | 2 | 5 | 5 | 4 | | 3 |
| Australia | | | | | 4 | | | | 5 | |
| Canada | | | | | 4 | | | | 2 | |
| Mexico | | | | | | | | | 4 | |
| Japan | | | | | | | | | | 1 |
| Thailand | | | | | | | | | | 2 |
| Singapore | | | | | | | | | | 4 |
| Korea | | | | | | | | | | 5 |

Base: all respondents in the respective source markets with valid responses (n = min. 221) Indication of the rankings on the basis of the responses submitted

Source market Germany: Unsupported theme competence (top of mind)

Question:

Please imagine that you intend to go on a "XY trip".

Which international tourist destinations (countries, cities, regions etc.) do you consider particularly suitable for this purpose?





Particularly suitable <u>international</u> destinations: TOP 10-Ranking <u>source market Germany</u> DB21/DB18





| ЭΒ | 21 | to go on an active sports holiday | % of respondents* |
|----|----|-----------------------------------|-------------------|
| | 1 | Austria | 36.3% |
| | 2 | Italy | 19.3% |
| | 3 | Spain | 17.4% |
| | 4 | Switzerland | 17.0% |
| | 5 | France | 9.5% |
| | 6 | Turkey | 7.9% |
| | 7 | Sweden | 5.3% |
| | 8 | Netherlands | 4.9% |
| | 9 | Greece | 4.7% |
| | 10 | Norway | 4.5% |

| OB1 | 8 | to go on an active sports holiday | % of respondents* |
|-----|----|-----------------------------------|-------------------|
| | 1 | Austria | 47.1% |
| | 2 | Switzerland | 19.1% |
| | 3 | Italy | 11.7% |
| | 4 | Spain | 10.5% |
| | 5 | Tirol | 8.4% |
| | 6 | France | 6.7% |
| | 7 | South Tirol | 5.0% |
| | 8 | Alps | 4.8% |
| | 9 | Norway | 4.5% |
| | 10 | Netherlands | 3.8% |

Base: all respondents in the source market Germany with valid responses (n = min. 418)

* Multiple answers possible; in % of respondents



Source: inspektour (international) GmbH / FH Westküste, 2018 / 2021





Particularly suitable international destinations: TOP 10-Ranking source market Germany DB21/DB18





| ЭΒ | 21 | to go on a culinary trip | % of respondents* |
|----|----|--------------------------|-------------------|
| | 1 | Italy | 44.8% |
| | 2 | France | 28.9% |
| | 3 | Spain | 23.3% |
| | 4 | Greece | 13.9% |
| | 5 | Austria | 12.9% |
| | 6 | Turkey | 7.9% |
| | 7 | Thailand | 7.1% |
| | 8 | Japan | 4.8% |
| | 9 | Netherlands | 4.1% |
| | 10 | Switzerland | 3.9% |
| | 10 | USA | 3.9% |

| DB18 to go on a culinary trip | | | % of respondents* |
|-------------------------------|----|-------------|-------------------|
| | 1 | Italy | 42.3% |
| | 2 | France | 31.5% |
| | 3 | Spain | 22.6% |
| | 4 | Austria | 16.6% |
| | 5 | Greece | 10.5% |
| | 6 | Thailand | 6.0% |
| | 7 | India | 5.2% |
| | 8 | South Tirol | 4.2% |
| | 9 | Japan | 4.0% |
| _ | 10 | Turkey | 3.8% |

Base: all respondents in the source market Germany with valid responses (n = min. 553) * Multiple answers possible; in % of respondents



Source: inspektour (international) GmbH / FH Westküste, 2018 / 2021

Conclusion and outlook



General developments in **European source markets**

- General potential interest:
 - General consistency in the ranking of holiday activities compared to previous studies
 - Partial (slight) decline in the share values among the top 10 holiday activities
- The general intention to travel abroad within the next 12 months
 has increased (slightly to significantly) in most source markets
 compared to DB20 for both short and long holidays
- while in the case of the period within the next 3 years it is consistently declining compared to DB20 (e.g. in relation to longer holiday travel)
- The relevance of corona travel strategies persists but is declining (often significantly) across source markets compared to DB20







Thank you for your attention!

Now we have time for your questions!





SAVE THE DATE – our next DB21 webinars:

22 March 2022 I 10 a.m. CET

DB21-Webinar City tourism in the second year of the coronavirus pandemic Language of presentation: English

29 March 2022 I 10 a.m. CET

DB21-Webinar The theme competence of Austrian destinations in the DACH region

Language of presentation: German

21 April 2022 I 10 a.m. CET

DB21-Webinar The theme competence of low mountain ranges and Alpine regions Language of presentation: German

28 April 2022 I 10 a.m. CET

DB21-Webinar The theme competence of **coastal destinations**

Language of presentation: German

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Contact persons for the study series Destination Brand



Contact person for Destination Brand study Ellen Böhling, M.A. CEO inspektour international GmbH

Tel.: +49 (0) 40. 414 3887 412 E-Mail: ellen.boehling@inspektour.de

Destination Brand team



CEO inspektour (international) GmbH **Ralf Trimborn** Dipl. Culture Management, Dipl. Economics (FH)

+49 (0) 40. 414 3887 42 Tel.: ralf.trimborn@inspektour.de E-Mail:



Scientific advisory board Prof. Dr. Bernd Eisenstein Director of the German Institute for Tourism Research

Tel.: +49 (0) 481. 85 55 545 eisenstein@ditf-fhw.de E-Mail:



Scientific advisory board Anne Köchling, MTM Project manager research

+49 (0) 481. 85 55 556 Tel.: koechling@ditf-fhw.de E-Mail:



Project manager market research **Alexander Koch** M.A. International Tourism Management

+49 (0) 40. 414 3887 46 Tel.:

E-Mail: alexander.koch@inspektour.de



Data analysis / data preparation Dörte Waldmann M.A. Geography and Tourism

Tel.: +49 (0) 40. 414 3887 417

E-Mail: doerte.waldmann@inspektour.de



Data analysis / data preparation Sistine Sadlowski M.A. International Tourism Management

Tel.: +49 (0) 40. 414 3887 413

E-Mail: sistine.sadlowski@inspektour.de





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Tourism and market research

Ellen Böhling, M.A.

Dipl. Culture Management, Dipl. Economics (FH) Ralf Trimborn

Managing partners Osterstraße 124 20255 Hamburg

Project leadership inspektour (international) GmbH, Hamburg

Scientific advisory board German Institute for Tourism Research

at the West Coast University of Applied Sciences, Heide

Data collection Ipsos GmbH, Hamburg

Supplementary note on the used images

For illustration purposes, images from "pixabay" (www.pixabay.com) were used in the context of the webinar.