

Measurement
of the
spontaneous
associations
for your tourist
destination

Sample report module 2

DESTINATION BRAND 22

SPONTANEOUS ASSOCIATIONS TO TOURIST DESTINATIONS

EXAMPLE: SOURCE MARKET CHINA

Sample report for the destination France

Note: This sample report is based on the study year Destination Brand 19 and serves to illustrate the basic structure and contents of an individual report for the spontaneous associations within the Destination Brand study series based on the **destination France**. The individual reports of the profile study Destination Brand 22 are subject to change.

Customer-oriented profile study | total of 1,005 respondents | population representative

Survey of the spontaneous associations to 10 tourist destinations

<p>Publisher and project leadership:</p>	 <p><i>inspektour (international) GmbH, Hamburg</i></p> <p><i>Concepts Studies Management Process Monitoring</i> <i>Market Research Destination Brand Moderation Mediation</i></p>
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<p>Scientific advisor DB22:</p>	 <p><i>German Institute for Tourism Research of the FH Westküste (University of Applied Sciences) Heide</i></p> <p><i>Leading University Institute in Tourism</i></p>

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1. Overview of the study series Destination Brand – Brand value study

Aim		– Customer-oriented evaluation of the brand value of tourist destinations				
Research focus		<ul style="list-style-type: none"> – Awareness (supported and unsupported) – Likeability – Willingness to visit for future short trips and longer holiday trips within the next 3 years (and DB20: within the next 12 months) – Visits in the past – DB 20: Impact of the coronavirus pandemic on the interest to visit – Target group- and competitor analysis 				
Survey design	For all sub-studies	<ul style="list-style-type: none"> – Online survey in respective national language; quota sample (based on cross quota age/sex and regional origin) – Representative of the respective population aged 14-74 years living in private households (basis for projection of absolute volumes) – Comprehensive competitive comparison possibilities based on the relatively large destination pool – Time comparison possibilities based on the consistent study design 				
	Specific per sub-study					
	Source markets	DE	DE	DE	DE AT CH NL	DE AT CH NL CN FR IT ES UK US
	Number of respondents	8,900	15,000	17,000	12,000	31,000
	Number of destinations	141	160	172	76*	200**
Number of themes / characteristics	--	--	--	--	--	

* In the study DB18 some destinations were surveyed in different source markets; distribution: DE = 45 | AT = 22 | CH = 33 | NL = 33.

** In the study DB20 some destinations were surveyed in different source markets; distribution: DE = 190 | AT = 10 | CH = 10 | NL = 10 | CN = 10 | FR = 20 | IT = 20 | ES = 12 | UK = 20 | US = 11.





1. Overview of the study series Destination Brand – Theme competence study

Aim		– Customer-oriented evaluation of the theme competence of tourist destinations (≙ associations of the functional benefits of the destination brands)				
Research focus		<ul style="list-style-type: none"> – General (i.e., regardless of a specific destination) interest in holiday activities – Supported theme suitability per destination (for 5 general themes and 5 specific themes) – Theme suitability top of mind per destination – Target group- and competitor analysis 				
Survey design	For all sub-studies	<ul style="list-style-type: none"> – Online survey in respective national language; quota sample (based on cross quota age/sex and regional origin) – Representative of the respective population aged 14-74 years living in private households (basis for projection of absolute volumes) – Comprehensive competitive comparison possibilities based on the relatively large destination pool – Time comparison possibilities based on the consistent study design 				
	Specific per sub-study					
	Source markets	DE	DE	DE	DE AT CH NL	DE AT CH NL CN FR IT ES UK US
	Number of respondents	10,500	16,000	17,000	12,000	28,000
	Number of destinations	141	160	172	76*	194**
Number of themes	5 general themes + 25 specific themes	5 general themes + 50 specific themes	6 general themes + 57 specific themes	5 general themes + 28 specific themes	5 general themes + 55 specific themes	

* In the study DB18 some destinations were surveyed in different source markets; distribution: DE = 45 | AT = 22 | CH = 33 | NL = 33.

** In the study DB21 some destinations were surveyed in different source markets; distribution: DE = 171 | AT = 30 | CH = 10 | NL = 10 | CN = 10 | FR = 10 | IT = 10 | ES = 10 | UK = 10 | US = 10.

1. Overview of the study series Destination Brand – Profile study

Aim		<ul style="list-style-type: none"> – Customer-oriented evaluation of the profiles / images of tourist destinations (≙ associations of the emotional-symbolic benefits of the destination brands) 			
Research focus		<p>Module 1 (M1):</p> <ul style="list-style-type: none"> – General (i.e., independent of a specific destination) relevance of attributes and characteristics when choosing a tourist destination – Supported evaluation of characteristics per destination (for 5 general and 5 specific characteristics) – Target group- and competitor analysis <p>Module 2 (M2):</p> <ul style="list-style-type: none"> – Spontaneous associations per destination 			
For all sub-studies		<ul style="list-style-type: none"> – Online survey in respective national language; quota sample (based on cross quota age/sex and regional origin) – Representative of the respective population aged 14-74 years living in private households (basis for projection of absolute volumes) – Comprehensive competitive comparison possibilities based on the relatively large destination pool – Time comparison possibilities based on the consistent study design 			
Survey design	Specific per sub-study				
	Source markets	DE	DE	DE	DE AT CH NL CN
	Number of respondents	10,000	11,000	17,000	8,000
	Number of destinations	M1: 104 M2: 22	M1: 115 M2: 21	M1: 170 M2: 170	55*
	Number of characteristics	6 general characteristics + 50 specific characteristics	6 general characteristics + 56 specific characteristics	8 general characteristics + 59 specific characteristics	Only spontaneous associations

* In the study DB19 some destinations were surveyed in different source markets; distribution: DE = 45 | AT = 8 | CH = 12 | NL = 8 | CN = 10.

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The survey for the study Destination Brand 22 is planned to be conducted in the source markets **Germany, Austria, Switzerland, the Netherlands and China, France, Italy, Spain, the United Kingdom and the USA.**

2.1 Planned methodology of the profile study Destination Brand 22

Aim of research

- Study of the **profile characteristics (module 1) of tourist destinations** as well as **spontaneous associations per destination (module 2)** on the following **source markets**:
 - Germany (DE), Austria (AT), Switzerland (CH), Netherlands (NL), France (FR), Italy (IT), Spain (ES), United Kingdom (UK), USA (US), China (CN)

Research focus

- **General relevance** of attributes and characteristics when choosing a tourist destination
- Module 1: **Supported evaluation of characteristics** per destination
 - **Time comparison** of key results for all tourist destinations in the source market Germany, which have been surveyed in the previous studies (e.g., DB17 or DB14)
 - **Competitor analysis** with all destinations surveyed per source market
- Module 2: **Spontaneous associations** per destination
- **Standard target group analysis** based on:
 - sociodemographic criteria
 - the general (i.e., destination independent) interest in holiday activities
 - the general (i.e., destination independent) relevance of characteristics when choosing a tourist destination
- Additional target group analyses (chargeable) according to:
 - the „Sinus-Milieus® Germany“* and „Sinus-Meta-Milieus®“* of the SINUS Institute
 - the „BeST types of holidaymakers“* of the FH Westküste

* These target groups are only available for the source market Germany.



2.1 Planned methodology of the profile study Destination Brand 22

Survey design

- about **150** (German & international) tourist destinations planned for the source market Germany; numbers of destinations in foreign source markets depend on the order situation
- **Total sample size:** expected to be about 24,000;
per destination: 1,000 (supported evaluation of characteristics and spontaneous associations);
distribution on the source markets: DE: 15,000 | all remaining source markets 1,000 each
- **Online survey in respective national language** (Note: CH = Ger. & Fr.)
- **Quota sample** based on cross quota age/sex and regional origin
- **Representative** of the local population living in private households in the respective countries aged between 14 and 74 years (deviation in source market China*):
DE = 61,94 m | AT = 6,59 m | CH = 6,02 m | NL = 12,78 m | FR = 46,61 m |
IT = 45,51 m | ES = 34,30 m | UK = 47,95 m | US = 246,50 m

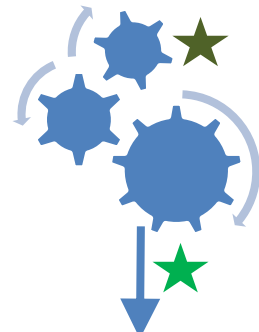
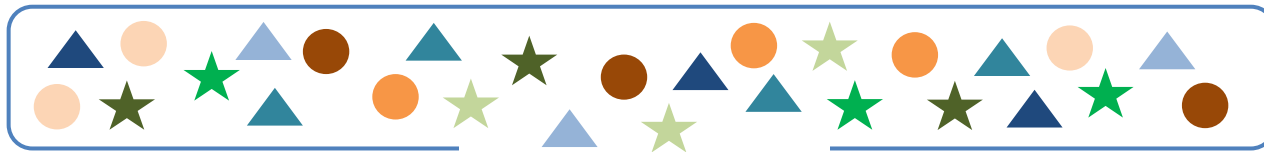
* Representative for the Ipsos panel participants in China, who meet the following criteria: Chinese-speaking urban population (included top city categories "Tier 1-3" excluding Hong Kong and Macau) aged 14-59 years with internet access, who according to additional filter questions have an affinity to travel abroad.

Survey period

- Survey period planned for **October till December 2022**

2.1 Methodology of the profile study Destination Brand 22 – Procedure of categorisation

Total of individual associations to the respective destination



Step 1: Examination of the content and classification of the individual associations into sub categories



Step 2: Grouping together to superior categories



2.2 Overview of the considered destinations in Destination Brand 19

	DE	AT	CH	NL	CN
1. Allgäu	■				
2. Austria					■
3. Bavaria	■				
4. Bavarian Forest	■				
5. Bergisches Land	■				
6. Berlin	■				■
7. Black Forest	■		■		■
8. City of Cottbus	■				
9. Dresden	■	■	■	■	
10. Duisburg	■				
11. Düsseldorf	■		■	■	■
12. East Frisian Islands	■				
13. Erzgebirge	■				
14. France		■			■
15. Franconia - wine.beautiful.country	■				
16. Garmisch-Partenkirchen		■	■		
17. German Fairy Tale Route	■				
18. Germany		■	■	■	■
19. Great Britain	■				
20. Havelland	■				
21. Ireland		■	■		
22. Island of Usedom	■				
23. Italy	■				
24. Karlsruhe	■		■	■	
25. Kassel	■				
26. Langeoog	■				
27. Latvia	■	■	■		
28. Leipzig	■				

	DE	AT	CH	NL	CN
29. London					■
30. Lüneburg Heath	■				
31. Luxembourg	■	■	■	■	
32. Munich	■				
33. Münsterland	■				
34. Netherlands	■				
35. Norderney	■				
36. North Rhine-Westphalia	■				
37. Paris					■
38. Rheingau	■				
39. Rhön	■			■	
40. Rothenburg ob der Tauber	■				
41. Saarland	■				
42. Salzburger Land	■				
43. Saxonian Elbland	■				
44. Saxony	■	■	■	■	
45. Saxony-Anhalt	■				
46. Schleswig-Holstein Wadden Sea National Park	■				
47. Spain					■
48. Stuttgart	■				
49. Switzerland					■
50. Upper Palatinate Forest	■				
51. Vorarlberg	■		■		
52. Weserbergland	■				
53. Western Pomerania	■				
54. Wilder Kaiser - Ellmau, Going, Scheffau, Söll			■		
55. Winterberg	■			■	

Note 1: The source markets are marked in green, if the respective destination was surveyed there in the course of the study Destination Brand 19.

Note 2: Last survey taken into consideration November / December 2019

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To determine the image profile, the respondents are asked the question "**What springs spontaneously to your mind when thinking of the Destination XY?**"

In the context of the Destination Brand profile study, the analysis of the spontaneous associations is based on the division of the individual mentions into **association sub categories**, each of which contains at least five individual mentions.

In order to clarify the overall content structure of the association profile of the destination, the association sub categories are also grouped into different **superior categories** (each containing at least 20 individual mentions).

3.1 Overview of the association superior categories

Overview of the association superior categories


> What springs spontaneously to your mind when thinking of the destination **France**?

■ **France**

Source market: China

Base: All respondents

Number of respondents 1,005

 Association superior categories		% of respondents	% of responses	Number of individual responses
1	Sights / attractions / events	105.0%	37.1%	1,055
2	Positive atmosphere / well-being	64.7%	22.8%	650
3	Places, cities and regions in France as well as in the surrounding area incl. attributes / general geographical location	39.3%	13.9%	395
4	Culinary in general	19.5%	6.9%	196
5	Politics & historical events	7.3%	2.6%	73
6	Landscape / nature in general	6.8%	2.4%	68
7	Holidays in general / holiday and leisure activities	6.5%	2.3%	65
8	Rivers / sea / coast	6.1%	2.1%	61
9	Negative mentions on France	2.5%	0.9%	25
10	Tradition & customs / regionality	2.4%	0.8%	24
	Other mentions on France without category allocation	5.1%	1.8%	51
	No mention of content (I don't know / I only know by name - nothing / I don't know - I don't know / I can't think of anything - I've never been there - invalid statement)	18.3%	6.5%	184
Sum of associations across categories		283.3%*	100.0%*	2,847*

* Due to the multiple response option, the sum of individual responses (2,847) is higher than the total number of respondents (1,005).

Source: inspektour (international) GmbH / IMT of the FH Westküste, 2019

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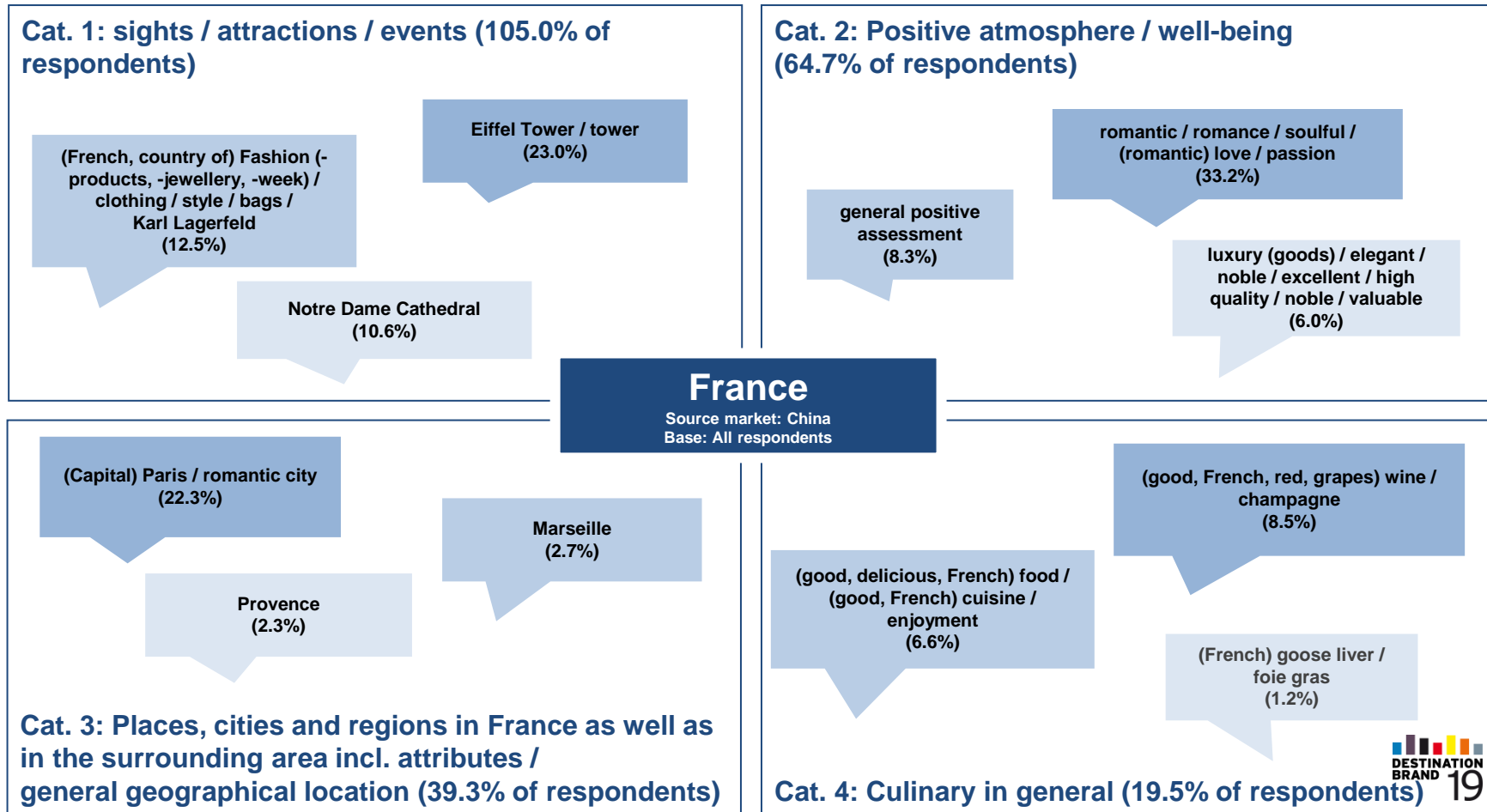
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By taking a detailed look at the superior categories formed, more in-depth information can be gained on the meaning of the respective associations.

3.2 Top 3 association sub categories of the 4 largest superior categories



Source: inspektour (international) GmbH / IMT of the FH Westküste, 2019

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3.3 Overall top 20 association sub categories

Overall top 20 association sub categories

> What springs spontaneously to your mind when thinking of the destination France?


■ **France**

Source market: China

Base: All respondents

Number of respondents 1,005

Top 20 sub categories – part 1 of 2

 Overall top 20 association sub categories		% of respondents	% of responses	Number of individual responses
1	romantic / romance / soulful / (romantic) love / passion	33.2%	11.7%	334
2	Eiffel Tower / tower	23.0%	8.1%	231
3	(Capital) Paris / romantic city	22.3%	7.9%	224
4	(French, country of) Fashion (-products, -jewellery, -week) / clothing / style / bags / Karl Lagerfeld	12.5%	4.4%	126
5	Notre Dame Cathedral	10.6%	3.8%	107
6	Louvre (-museum) / (the smile of the) Mona Lisa	10.3%	3.7%	104
7	(French) perfume / cosmetics, e.g. Chanel, Lancome, l'Oreal	9.1%	3.2%	91
8	Arc de Triomphe (in Paris) / Place Charles-de-Gaulle	9.0%	3.2%	90
9	(good, French, red, grapes) wine / champagne	8.5%	3.0%	85
10	general positive assessment (e.g. (very, wonderful) beautiful, graceful, attractive, inspiring, fascinating, I like it, (really, very) good, (very) interesting, magnificent, splendid)	8.3%	2.9%	83

Source: inspektour (international) GmbH / IMT of the FH Westküste, 2019

3.3 Overall top 20 association sub categories

Overall top 20 association sub categories

> *What springs spontaneously to your mind when thinking of the destination France?*


■ **France**

Source market: China

Base: All respondents

Number of respondents 1,005

Top 20 sub categories – part 2 of 2

 Overall top 20 association sub categories		% of respondents	% of responses	Number of individual responses
11	(good, delicious, French) food / (good, French) cuisine / enjoyment	6.6%	2.3%	66
12	luxury (goods) / elegant / noble / excellent / high quality / noble / valuable	6.0%	2.1%	60
13	(Palace) Versailles	4.8%	1.7%	48
14	Seine (-bank)	4.7%	1.7%	47
15	animated / colourful / emotional / with enthusiasm / full of energy / lively / you can have fun / atmosphere	3.6%	1.3%	36
16	Film / (international) Cannes Film Festival / Pirates of the Caribbean / Sophie Marceau	3.5%	1.2%	35
17	(hospitable) friendly / charm / gentleman / humanistic / open / tolerant	3.3%	1.2%	33
18	Avenue des Champs-Élysées	3.2%	1.1%	32
19	(beautiful, great) landscape (surroundings, area, environment) / (beautiful, much) nature (pure)	2.8%	1.0%	28
20	Marseille	2.7%	0.9%	27

Source: inspektour (international) GmbH / IMT of the FH Westküste, 2019

3.3 Overall top 20 association sub categories – Wordcloud (Base: All respondents)



Note: The representation is based on the quantitative distribution of the top 20 association sub categories for the destination France in the source market China, i.e. the larger the respective sub category is represented, the more frequently - but not linearly - it was associated with the destination France.

Source: inspektour (international) GmbH / IMT of the FH Westküste, 2019

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In addition, the report contains in-depth evaluations of the top 20 association sub categories according to the subgroup "**visitors in the past**" and, in the case of foreign destinations, from the perspective of the respective source market on the basis of "**respondents with a distinct intention to travel abroad**".

3.4 Overall top 20 association sub categories – by subgroups

Overall top 20 association sub categories – by subgroups

> What springs spontaneously to your mind when thinking of the destination **France**?
> in % of respondents


■ France

Source market: China

Base: All respondents by subgroups

Number of respondents 1,005

Top 20 sub categories – part 1 of 2

 Overall top 20 association sub categories – by subgroups > in % of respondents		All respondents	Visitors in the past	Distinct intention to travel abroad
1	romantic / romance / soulful / (romantic) love / passion	33.2%	38.6%	34.4%
2	Eiffel Tower / tower	23.0%	23.9%	22.0%
3	(Capital) Paris / romantic city	22.3%	26.1%	22.3%
4	(French, country of) Fashion (-products, -jewellery, -week) / clothing / style / bags / Karl Lagerfeld	12.5%	18.8%	13.4%
5	Notre Dame Cathedral	10.6%	9.8%	9.8%
6	Louvre (-museum) / (the smile of the) Mona Lisa	10.3%	10.5%	10.1%
7	(French) perfume / cosmetics, e.g. Chanel, Lancome, l'Oreal	9.1%	10.3%	9.8%
8	Arc de Triomphe (in Paris) / Place Charles-de-Gaulle	9.0%	8.7%	9.2%
9	(good, French, red, grapes) wine / champagne	8.5%	11.2%	9.4%
10	general positive assessment (e.g. (very, wonderful) beautiful, graceful, attractive, inspiring, fascinating, I like it, (really, very) good, (very) interesting, magnificent, splendid)	8.3%	12.1%	7.9%

3.4 Overall top 20 association sub categories – by subgroups

Overall top 20 association sub categories – by subgroups

> What springs spontaneously to your mind when thinking of the destination **France**?
> in % of respondents


■ France

Source market: China

Base: All respondents by subgroups

Number of respondents 1,005

Top 20 sub categories – part 2 of 2

 Overall top 20 association sub categories – by subgroups > in % of respondents		All respondents	Visitors in the past	Distinct intention to travel abroad
11	(good, delicious, French) food / (good, French) cuisine / enjoyment	6.6%	9.8%	7.5%
12	luxury (goods) / elegant / noble / excellent / high quality / noble / valuable	6.0%	8.0%	6.5%
13	(Palace) Versailles	4.8%	4.7%	5.3%
14	Seine (-bank)	4.7%	5.6%	5.6%
15	animated / colourful / emotional / with enthusiasm / full of energy / lively / you can have fun / atmosphere	3.6%	5.1%	3.2%
16	Film / (international) Cannes Film Festival / Pirates of the Caribbean / Sophie Marceau	3.5%	3.6%	3.6%
17	(hospitable) friendly / charm / gentleman / humanistic / open / tolerant	3.3%	4.0%	3.6%
18	Avenue des Champs-Élysées	3.2%	2.7%	3.1%
19	(beautiful, great) landscape (surroundings, area, environment) / (beautiful, much) nature (pure)	2.8%	3.6%	3.2%
20	Marseille	2.7%	3.8%	3.2%

Source: inspektour (international) GmbH / IMT of the FH Westküste, 2019

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4.1 Spontaneous associations – Cat. 1 „sights / attractions / events“

Spontaneous associations in category 1: “sights / attractions / events”

> What springs spontaneously to your mind when thinking of the destination **France**?


■ **France**

Source market: China

Base: All respondents

Number of respondents 1,005

Associations in category 1 – part 1 / 3

 Spontaneous associations in category 1: “sights / attractions / events”		% of respondents	% of responses	Number of individual responses
1	Eiffel Tower / tower	23.0%	8.1%	231
2	(French, country of) Fashion (-products, -jewellery, -week) / clothing / style / bags / Karl Lagerfeld	12.5%	4.4%	126
3	Notre Dame Cathedral	10.6%	3.8%	107
4	Louvre (-museum) / (the smile of the) Mona Lisa	10.3%	3.7%	104
5	(French) perfume / cosmetics, e.g. Chanel, Lancome, l'Oreal	9.1%	3.2%	91
6	Arc de Triomphe (in Paris) / Place Charles-de-Gaulle	9.0%	3.2%	90
7	(Palace) Versailles	4.8%	1.7%	48
8	Film / (international) Cannes Film Festival / Pirates of the Caribbean / Sophie Marceau	3.5%	1.2%	35

4.1 Spontaneous associations – Cat. 1 „sights / attractions / events“

Spontaneous associations in category 1: “sights / attractions / events”

> What springs spontaneously to your mind when thinking of the destination **France**?


■ **France**

Source market: China

Base: All respondents

Number of respondents 1,005

Associations in category 1 – part 2 / 3

 Spontaneous associations in category 1: “sights / attractions / events”		% of respondents	% of responses	Number of individual responses
9	Avenue des Champs-Élysées	3.2%	1.1%	32
10	(full, temple of) art (works) / (classical) literature / exhibitions	2.6%	0.9%	26
11	(European, classical, strong) culture / culturally interesting / (world) cultural heritage	2.4%	0.8%	24
12	(old, grand, historic) buildings / (beautiful) old towns / (beautiful, gothic) architecture	1.8%	0.6%	18
13	(fine) museums in general as well as various other specific museums, e.g. International Museum of Miniature Film Art, Lyon Art Museum, Musée d'Orsay, Musée de l'Orangerie, Musée des Beaux-Arts de Caen, Museum of Modern and Contemporary Art, Museum of Metz, Normandy Museum	1.6%	0.6%	16
13	Football / Ligue 1 / PSG / Mbappé / Zidane	1.6%	0.6%	16
15	(beautiful, water) castles in general as well as various other specific castles, e.g. Amboise Castle, Azay-le-Rideau Castle, Chambord Castle, Chenonceau Castle, Fontainebleau Castle	1.4%	0.5%	14
16	(beautiful) churches / cathedrals / cathedrals in general as well as various other specific churches / cathedrals, e.g. Church of Our Lady, Amiens Cathedral, Orléans Cathedral, La Madeleine Parish Church.	1.0%	0.4%	10

Source: inspektour (international) GmbH / IMT of the FH Westküste, 2019

4.1 Spontaneous associations – Cat. 1 „sights / attractions / events“

Spontaneous associations in category 1: “sights / attractions / events”

> What springs spontaneously to your mind when thinking of the destination **France**?


■ **France**

Source market: China

Base: All respondents

Number of respondents 1,005

Associations in category 1 – part 3 / 3

 Spontaneous associations in category 1: “sights / attractions / events”		% of respondents	% of responses	Number of individual responses
16	French poets / painters / philosophers, e.g. Alexandre Dumas (the elder, the younger), Monet, Victor Hugo, Voltaire	1.0%	0.4%	10
18	Sights in Colmar in general as well as various other specific sights in Colmar, e.g. old town, railway station, half-timbered houses, market, Little Venice.	0.7%	0.2%	7
19	Classical / Opera / Opera House / Palais Garnier	0.6%	0.2%	6
	Other mentions belonging to category 1 "sights / attractions / events" (e.g. attractions, busy street, beer festival, Millau bridge, Disneyland, Statue of Liberty, (Li Na wins the) French Open, Grande Arche, Jardin des Tuileries, Paris Catacombs, Middle Ages, Mont Saint-Michel, Moulin Rouge, parade, Paris metro, Place d'Alliance, Place de la Concorde, Pont du Gard, cycle race, Roman amphitheatre of Fourvière, sports, tennis, theme park, Tour de France, Vauban Dam)	4.4%	1.5%	44
Sum of individual responses belonging to category 1		105.0%	37.1%	1,055

Within the framework of the DB22 reports, this evaluation is carried out similarly for all superior categories of the respective destination.

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The number of respondents for all considered destinations with regard to the supported evaluation of characteristics is at least 1,000. This comprehensive sample size generally permits the execution of **more detailed and statistically secured analyses**.

In the course of the **standard target group analysis** of the individual reports the evaluation of the characteristics of your tourist destination is differentiated by **up to 6 individually selected target groups**.

The target groups can be defined on the basis of sociodemographic criteria, the general (i.e., regardless of a specific destination) interest in various holiday activities, the general (i.e., regardless of a specific destination) relevance of various characteristics, the intention of the respondents to travel abroad / domestically as well as a combination of these aspects.

Concerning the **source market Germany**, additional comprehensive options of the target group analysis can be ordered as an add-on comprising the following renowned target group segmentations:

- the **“Sinus Milieus® Germany”** and the **“Sinus-Meta-Milieus®”**, which provide a realistic depiction of the socio-cultural diversity in societies by accurately describing people’s attitudes and orientations, values, lifestyles and life goals as well as social backgrounds and positions
- the **“BeST types of holiday makers”**, which are based on the beliefs and benefit expectations of the German population and thus serve to gain a better understanding of the demands on a holiday and the customer-oriented interpretation of supply-related holiday topics (developed by the German Institute for Tourism Research of the FH Westküste in the year 2020)

5. Standard target group analysis

Examples for possible target group definitions

“Young singles and couples with higher education”

- Age of the respondents: 18 to 34 years and
- Household size: 1- and 2-person households and
- Formal education of the respondents: min. higher secondary education

“Families with children”

- At least 1 child younger than 14 years living in the household

“Best Ager”

- Age of respondents: 55 to 74 years

“Affine to sustainability”

- General (i.e., regardless of a specific destination) relevance for destination selection of the characteristic “sustainable”
(Top-Two-Box on a scale from “5 = very relevant” to “1 = not at all relevant”)

“Interested in city trips”

- General (i.e., regardless of a specific destination) interest in the holiday activity “Taking a city trip”
(Top-Two-Box on a scale from “5 very interested” to “1 = not at all interested”)

“Interested in culture”

- General (i.e., regardless of a specific destination) interest in the holiday activity “Visiting cultural institutions / using cultural services”
(Top-Two-Box on a scale from “5 very interested” to “1 = not at all interested”)

5. Standard target group analysis

Overall top 20 association sub categories

> What springs spontaneously to your mind when thinking of the destination **France**?


■ France

Source market: China

Base: All respondents by target groups*

Number of respondents 1,005

Top 20 sub categories – part 1 of 2

 Overall top 20 association sub categories (in % of respondents)		All respondents	Young singles and couples with higher education	Families with children	Best Ager	Affine to sustainability	Interested in city trips	Interested in culture
1	romantic / romance / soulful / (romantic) love / passion	33.2%	33.7%	30.9%	51.0%	37.2%	34.6%	31.3%
2	Eiffel Tower / tower	23.0%	21.9%	21.5%	39.1%	16.9%	22.8%	21.7%
3	(Capital) Paris / romantic city	22.3%	22.5%	22.4%	29.4%	22.7%	23.4%	22.7%
4	(French, country of) Fashion (-products, -jewellery, -week) / clothing / style / bags / Karl Lagerfeld	12.5%	7.7%	13.0%	15.6%	10.6%	13.8%	11.9%
5	Notre Dame Cathedral	10.6%	13.6%	8.9%	17.2%	9.9%	11.1%	9.7%
6	Louvre (-museum) / (the smile of the) Mona Lisa	10.3%	12.4%	10.6%	12.9%	9.9%	10.4%	10.5%
7	(French) perfume / cosmetics, e.g. Chanel, Lancome, l'Oreal	9.1%	7.1%	8.0%	14.6%	10.2%	9.4%	8.4%
8	Arc de Triomphe (in Paris) / Place Charles-de-Gaulle	9.0%	13.6%	8.9%	17.4%	6.7%	9.3%	9.2%
9	(good, French, red, grapes) wine / champagne	8.5%	5.9%	9.4%	13.6%	8.0%	9.7%	9.1%
10	general positive assessment (e.g. (very, wonderful) beautiful, graceful, attractive, inspiring, fascinating, I like it, (really, very) good, (very) interesting, magnificent, splendid)	8.3%	3.0%	9.6%	12.1%	6.4%	8.5%	10.2%

* Due to the multiple response option, no significance test can be carried out for the differentiation according to target groups.

5. Standard target group analysis

Overall top 20 association sub categories

> What springs spontaneously to your mind when thinking of the destination France?


■ France

Source market: China

Base: All respondents by target groups*

Number of respondents 1,005

Top 20 sub categories – part 2 of 2

 Overall top 20 association sub categories (in % of respondents)		All respondents	Young singles and couples with higher education	Families with children	Best Ager	Affine to sustainability	Interested in city trips	Interested in culture
11	(good, delicious, French) food / (good, French) cuisine / enjoyment	6.6%	4.1%	5.5%	12.6%	6.4%	7.2%	6.7%
12	luxury (goods) / elegant / noble / excellent / high quality / noble / valuable	6.0%	7.7%	6.3%	8.6%	7.6%	7.5%	6.1%
13	(Palace) Versailles	4.8%	5.3%	4.8%	8.0%	2.9%	4.9%	4.5%
14	Seine (-bank)	4.7%	5.9%	4.4%	7.7%	3.5%	4.9%	4.2%
15	animated / colourful / emotional / with enthusiasm / full of energy / lively / you can have fun / atmosphere	3.6%	4.1%	3.6%	5.3%	4.1%	3.7%	2.3%
16	Film / (international) Cannes Film Festival / Pirates of the Caribbean / Sophie Marceau	3.5%	3.6%	3.1%	5.7%	2.3%	3.1%	3.4%
17	(hospitable) friendly / charm / gentleman / humanistic / open / tolerant	3.3%	4.1%	3.2%	6.4%	2.9%	3.5%	3.1%
18	Avenue des Champs-Élysées	3.2%	2.4%	3.8%	5.0%	2.3%	2.5%	3.3%
19	(beautiful, great) landscape (surroundings, area, environment) / (beautiful, much) nature (pure)	2.8%	2.4%	2.7%	2.1%	7.1%	3.4%	3.6%
20	Marseille	2.7%	4.1%	2.7%	2.3%	2.3%	3.0%	2.7%

* Due to the multiple response option, no significance test can be carried out for the differentiation according to target groups.

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6.1 inspektour (international) GmbH – Tourism and regional development

6.2 German Institute for Tourism Research of the FH Westküste

6.3 Ipsos GmbH

6.4 Contact persons for the study series Destination Brand

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6.4 Contact persons for the study series Destination Brand



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7.1 Reading example – Overview of the association superior categories

Overview of the association superior categories

> What springs spontaneously to your mind when thinking of the destination **Destination XY**?

■ Destination XY

Source market: Source market XY

Base: All respondents

Number of respondents 1,000

Association superior categories ²		% of respondents	% of responses ¹	Number of individual responses
1	sights / attractions / events	35.4%	23.2%	354
2	places, cities and regions in the holiday region as well as in the surrounding area incl. attributes	27.8%	18.3%	278
3	holiday and leisure activities	21.2%	13.9%	212
4	mountainous landscape / nature in general ³	17.3%	11.4%	173
5	general geographical location	15.6%	10.2%	156
6	positive atmosphere / well-being	10.9%	7.2%	109
7	negative mentions on Destination XY	4.9%	3.2%	49
8	personal reference to Destination XY	2.1%	1.4%	21
9	Other mentions of Destination XY without category allocation	3.9%	2.6%	39
	No mention of content (I don't know / I only know by name - nothing / I don't know - I don't know / I can't think of anything - I've never been there - invalid statement)	13.2%	8.7%	132
Sum of associations across categories		152.3%*	100.0%*	1.523*

* Due to the multiple response option, the sum of individual responses (1,532) is higher than the total number of respondents (1,000).

Central question: Which of the superior categories formed is most strongly associated with Destination XY?

– Reading example: **Superior category 4 „mountainous landscape / nature in general“** (Base: All respondents)

- ³ ▶ The cluster "mountainous landscape / nature in general" is the fourth strongest association superior category of the destination.
- ▶ This superior category accounts for 173 of the total number of associations. This corresponds to 17.3% of the 1,000 respondents or 11.4% of the 1,523 spontaneous associations.

¹ For each association superior category, both the percentage based on the **total number of respondents** (1,000), the percentage based on the **sum of individual responses** (1,523) and the respective **number of individual responses** are shown.

² In the example, the responses were clustered and divided into eight different **superior categories** as well as a supplementary group of other responses to Destination XY without category allocation.

7.1 Reading example – Spontaneous associations per superior category in detail

Spontaneous associations in category 4: “mountainous landscape / nature in general”

> What springs spontaneously to your mind when thinking of the destination Destination XY?

■ Destination XY

Source market: Source market XY

Base: All respondents

Number of respondents 1,000

Associations in category 4

Spontaneous associations in category 4: “mountainous landscape / nature in general”		% of respondents	% of responses	Number of individual responses
1	(many, high) mountains / mountainous / mountain (ranges) / peaks	6.2%	4.1%	62
2	(beautiful, great) landscape (surroundings, area) / (beautiful, much) nature (pure) / (much) greenery	3.4%	2.2%	34
3	rural / rural region	2.5%	1.6%	25
4	(much) forest / (many, beautiful, varied) woods	2.1%	1.4%	21
5	Lakes / some lakes for swimming and fishing	1.4%	0.9%	14
6	(relaxed) expanse / wide land / (beautiful) views	1.0%	0.7%	10
	Other mentions for category 4 “mountainous landscape / nature in general” (e.g. farms, agriculture, nature conservation (area), (wild) animals)	0.7%	0.5%	7
Sum of individual responses belonging to category 4		17.3%	11.4%	173

* Sum of further individual mentions within the category with less than 5 mentions each.

Central question: Which spontaneous associations are most frequently associated with Destination XY in the case of superior category 4 “mountainous landscape / nature in general”? – Reading example: “(many, high) mountains / mountainous / mountain (ranges) / peaks” (Base: All respondents)

- 3
- ▶ Within superior category 4 „mountainous landscape / nature in general“, “many, high) mountains / mountainous / mountain (ranges) / peaks” is the top association subcategory with a total of 62 individual mentions.
 - ▶ This corresponds to 6.2% of the 1,000 respondents or 4.1% of the 1,523 spontaneous associations to Destination XY.

1
For each association superior category, both the percentage based on the **total number of respondents** (1,000), the percentage based on the **sum of individual responses** (1,523) and the respective **number of individual responses** are shown.

2
In order to enable a detailed analysis of the spontaneous associations, the respective **sub categories** are additionally listed for each superior category formed.

3
As the number of mentions per association sub category decreases (≤ 20 individual mentions), the informative value of these is significantly reduced (therefore written in grey font in the overview tables).

7.1 Reading example – Standard target group analysis

Overall top 20 association sub categories

> What springs spontaneously to your mind when thinking of the destination **Destination XY**?

■ Destination XY

Source market: Source market XY
Base: All respondents by target groups*
Number of respondents 1,000
Top 20 sub categories

Overall top 20 association sub categories (in % of respondents)		All respondents	Families with children	Interested in hiking	Best Agers affine to culture
1	Castles / Palaces	14.3%	11.2%	15.3%	19.7%
2	(excellent for) hiking / (great) hiking trails	12.2%	13.4%	21.7%	11.6%
3	(beautiful, attractive, tranquil) villages / (regionally typical) architecture	10.3%	8.7%	7.9%	12.3%
4	(many, high) mountains / mountainous / mountain (ranges) / peaks	6.2%	6.1%	8.3%	6.9%
5	(traditional) craftsmanship	5.7%	5.3%	4.7%	7.3%
6	(good, tasty, hearty) food / (good, regional) cuisine	4.8%	4.2%	3.9%	6.2%
7	(beautiful, great) landscape (surroundings, area) / (beautiful, much) nature (pure) / (much) greenery	3.4%	3.9%	5.5%	3.1%
8	(nice, friendly, warm) people / hospitality	3.3%	5.1%	4.3%	3.8%
9	rural / rural region	2.5%	3.1%	4.2%	2.7%
10	mountaineering / climbing / climbing forest	2.1%	1.9%	4.9%	1.5%

* Due to the multiple response option, no significance test can be carried out for the differentiation according to target groups.

Central question: With regard to which spontaneous association sub categories can target group-specific particularities be identified? – Reading example: “(excellent for) hiking / (great) hiking trails”

- 3 ► In this example the target groups “Families with children”, “Interested in hiking” and “Best Agers affine to culture” are shown.
- Among the target groups presented, the sub category “(excellent for) hiking / (great) hiking trails” is most frequently associated with Destination XY by the target group “Interested in hiking” (21.7%). Compared to the total of respondents (12.2%), the percentage of this association sub category among the target group “Interested in hiking” is clearly above average.

1 In addition to the univariate results of analyses, further **bivariate evaluations** are also part of the report. Among other things, Top 20 association sub categories are differentiated according to **selected target groups**. Within the framework of the standard target group analysis, the target groups can be individually defined on the basis of socio-demographic characteristics, the general interest in various holiday activities and/or the general relevance of various profile characteristics for destination selection. For the source market Germany there is also the possibility of conducting a target group analysis according to the “Sinus-Milieus®” of the SINUS Institute as well as according to the “BeST types of holidaymakers” of the FH Westküste.

2 For each target group, the percentages are based on the **total number of respondents**.

3 Due to the multiple response option, no significance test can be carried out for the differentiation according to target groups.

7.2 Glossary – Contents of the Profile study

Contents of the Profile study

General relevance of characteristics (module 1)	Share of the represented population for whom the respective characteristic is generally relevant when choosing a destination for a holiday with at least one overnight stay (measured using the top-two box on a multi-tiered scale for the general relevance of characteristics)
Supported evaluation of characteristics (module 1)	Share of the represented population that rates the respective characteristic as applicable for the destination in question (measured using the top-two box on a multi-tiered scale for the supported evaluation of characteristics)
Spontaneous associations (module 2)	Anteil der repräsentierten Bevölkerung, der mit dem betreffenden Reiseziel spontan bestimmte Einfälle bzw. Assoziationen (d.h. ohne Antwortvorgaben) verbindet

Subgroups

Characteristic-attributors	Respondents who rate the respective characteristic as applicable to the destination in question (measured using the top-two box on a multi-tiered scale for the supported evaluation of characteristics)
Affine to the characteristic	Respondents for whom the respective characteristic is generally relevant when choosing a destination for a holiday with at least one overnight stay (measured using the top-two box on a multi-tiered scale for the general relevance of characteristics)
Distinct intention to travel abroad	Respondents who definitely (top value) intend to spend a short holiday trip (with 1 – 3 overnight stays) <u>and/or</u> a longer holiday trip (with 4 or more overnight stays) abroad within the next 3 years
Visitors in the past	Respondents who have already holidayed in the tourist destination (with at least one overnight stay)

7.2 Glossary – Methods

Methods

Representativeness	Is used to indicate that a sample reflects all (essential) characteristics of a population and thus mirrors the total population. In a stricter sense, a sample is representative if all the individuals in the population had the same possibility of becoming part of that sample.
Population	A population is a finite set of statistical units that are of interest for primary research. As it is often not possible to survey the total population, a sample is usually selected (partial survey) to determine the opinion of the population. In case of small populations, a complete survey among all individuals belonging to the population might be possible.
Sample	A sample is a selection of people or objects that provides representative information on behalf of a population. The responses given by the sample can be applied for the entire population.
Quota sample	The quota sample is a systematic selection procedure. In the case of quota samples, the selection of the representative sample to be surveyed is not left to chance, but the selection is made on the basis of so-called control variables. Control variables are usually demographic data such as gender, age, income, level of education, etc. The knowledge of the composition of a population with regard to these control variables is usually based on other statistical surveys, such as official statistics. The selection of statistical units that hold the defined control variables (i.e., survey respondents), is not random, but is determined by a responsible party.
Confidence level / probability	The confidence level indicates the probability that the value of a statistical parameter (for example, a mean) from a sample survey is appropriate for the population. Confidence levels must be set for a survey – they form the basis not only for the error tolerance but also for the necessary size of a sample. Surveys in the social sciences frequently use confidence levels of 90, 95 or 99 percent. If the confidence level is 95 percent, this means that a statistically determined value from the sample survey is 95 percent likely to be within the calculated confidence interval for the population as well.

7.2 Glossary – *Methods*

Methods

Level of significance

Used to test the significance of a null hypothesis. The level of significance represents the upper limit of the margin of error and is in the social sciences generally at 5%. The results of a hypothesis test indicate that there is a probability of 95% that a measured correlation from within the sample is also applicable to the overall population. The remaining 5% mean that there is still a probability that the results are generated by chance and a statistical correlation is mistakenly assumed.

Significant

A tested correlation between variables can be identified as significant, if the level of significance is within the defined level and does not exceed 95% probability. Thus, the assumed hypothesis and statistical correlation is applicable to the population. In short, a measured correlation between two variables did not randomly appear in the sample, but also applies to the population. To check this, a hypothesis test is carried out.

Hypothesis test / test of significance

Hypothesis tests (including statistical tests or tests of significance) are used to confirm or reject constructed hypotheses based on empirical observations. For example, it is assumed that the average age of the population is increasing over time. The hypothesis to be proven “the population is aging” is referred to as an alternative hypothesis, the previous opinion “the average age of the population is always the same” is referred to as the null hypothesis. The aim of the hypothesis test is to reject the null hypothesis and thus confirm the alternative hypothesis.

7.2 Glossary – *Measurement categories*

Measurement categories

Percentage of responses	This means that the number of responses is used to calculate the percentage value.
Percentage of cases	This means that the number of respondents is used to calculate the percentage value. For multiple response options, the percentage may be greater than 100 percent.
Share value per category	Share of the respective measuring unit that corresponds to the considered category, percentage
Top-two-box (value)	Sum of the two highest values of a rating scale, percentage
Change	Rate of change compared to a previous period, percentage points

Units, symbols

%, %-Pkt.	Percentage, percentage points
∅	Average, (corresponds to arithmetic mean)

Supplementary note on the used images

For illustration purposes, images from “pixabay” (www.pixabay.com) were used in the context of the report.

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