



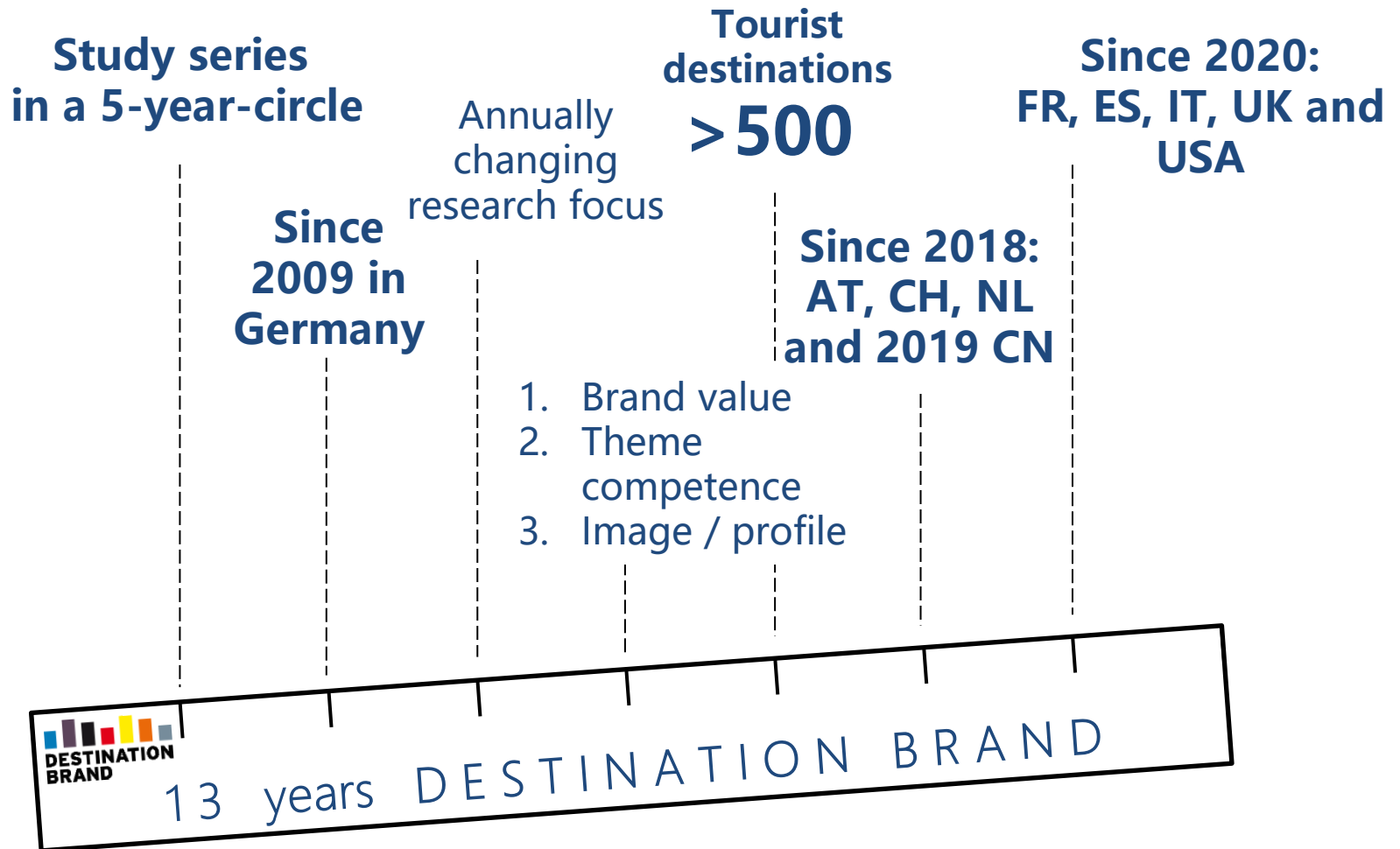
## DESTINATION BRAND 21

# City tourism in the second year of the coronavirus pandemic

Presentation of selected key results | 22 March 2022 | 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**

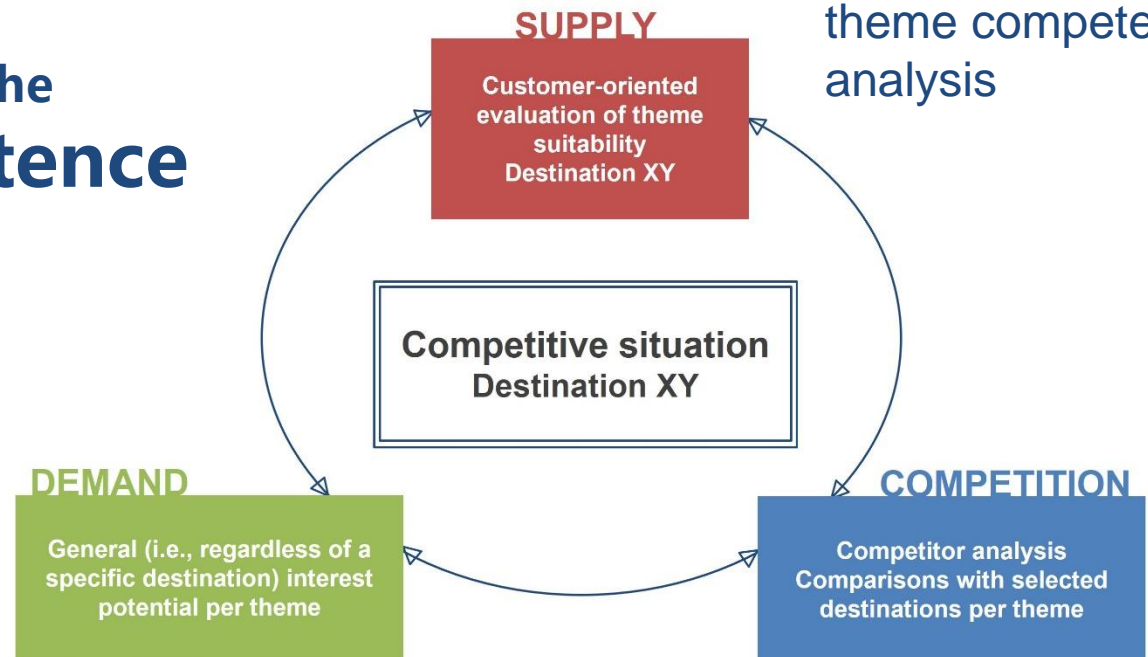
# **DESTINATION BRAND 21**

## **at a glance**

## DESTINATION BRAND 21 at a glance

### Measurement of the Theme competence

Three-dimensional  
theme competence  
analysis



## DESTINATION BRAND 21 at a glance

### Measurement of the Theme competence

- Add-on module:**
  - + COVID 19 impact
- Information package:**
  - + Media behaviour & language use

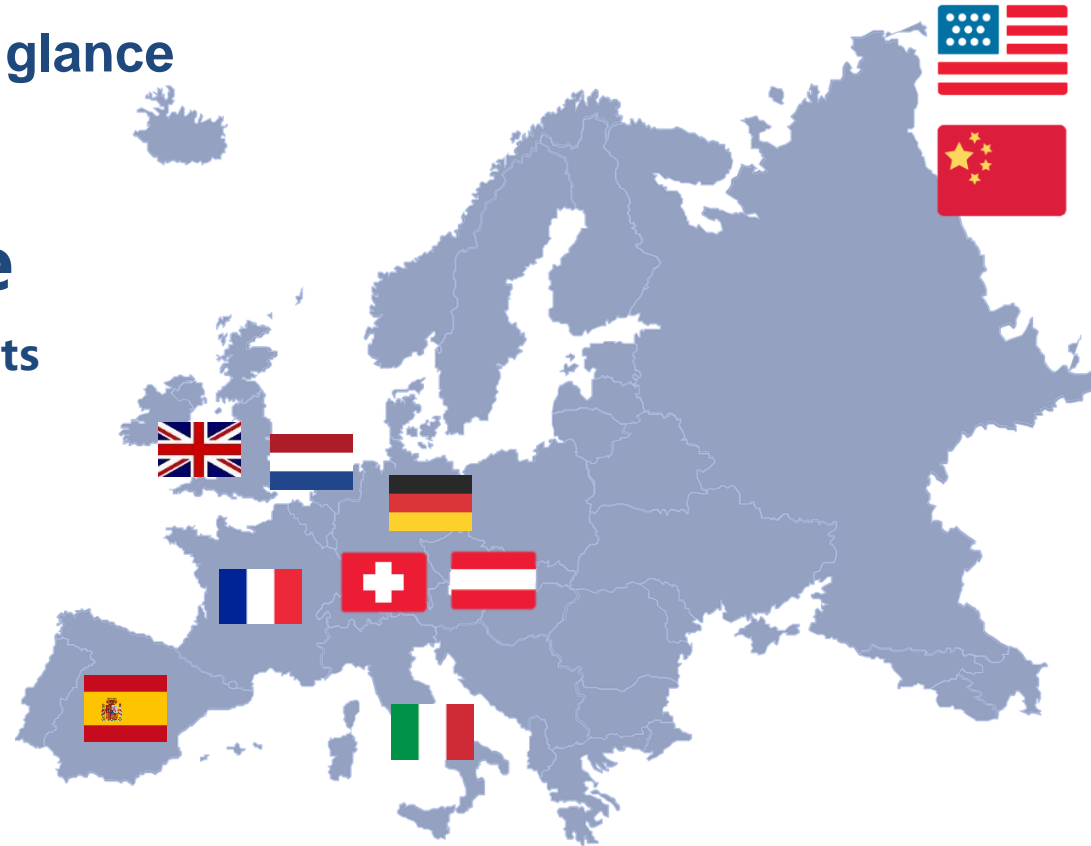


## DESTINATION BRAND 21 at a glance

### Measurement of the Theme competence

Source markets  
**10**

Add-on module +  
Information package



## DESTINATION BRAND 21 at a glance

### Measurement of the Theme competence

Source markets  
**10**  
Add-on module +  
Information package

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

Destinations  
**>170**

Online survey  
Field work: Oct. to Dec. 21

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



- Exception China:  
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**

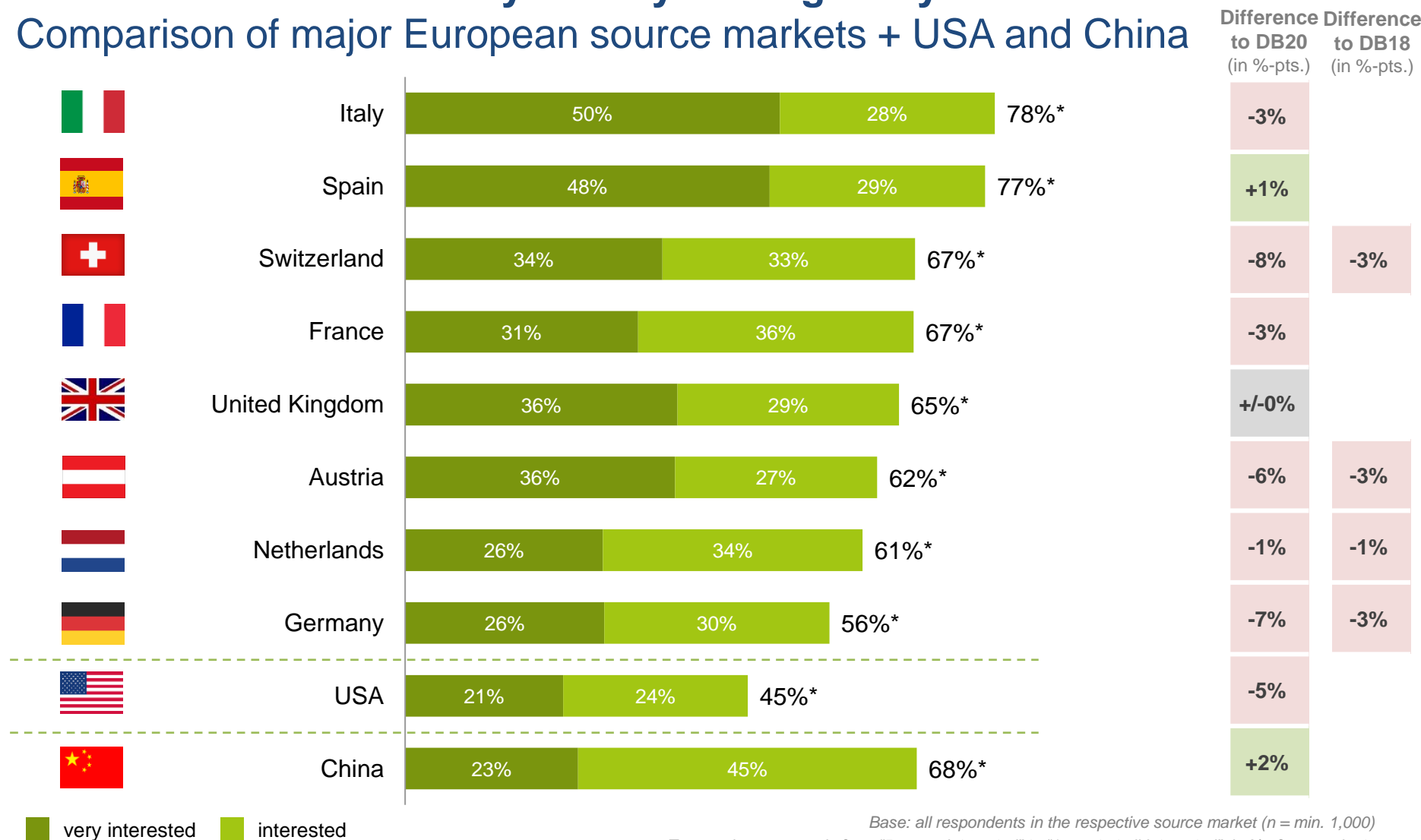
# **General interest in taking a city break**

**Question:**

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

**“Taking a city break”**

# General interest in holiday activity “taking a city break”: Comparison of major European source markets + USA and China



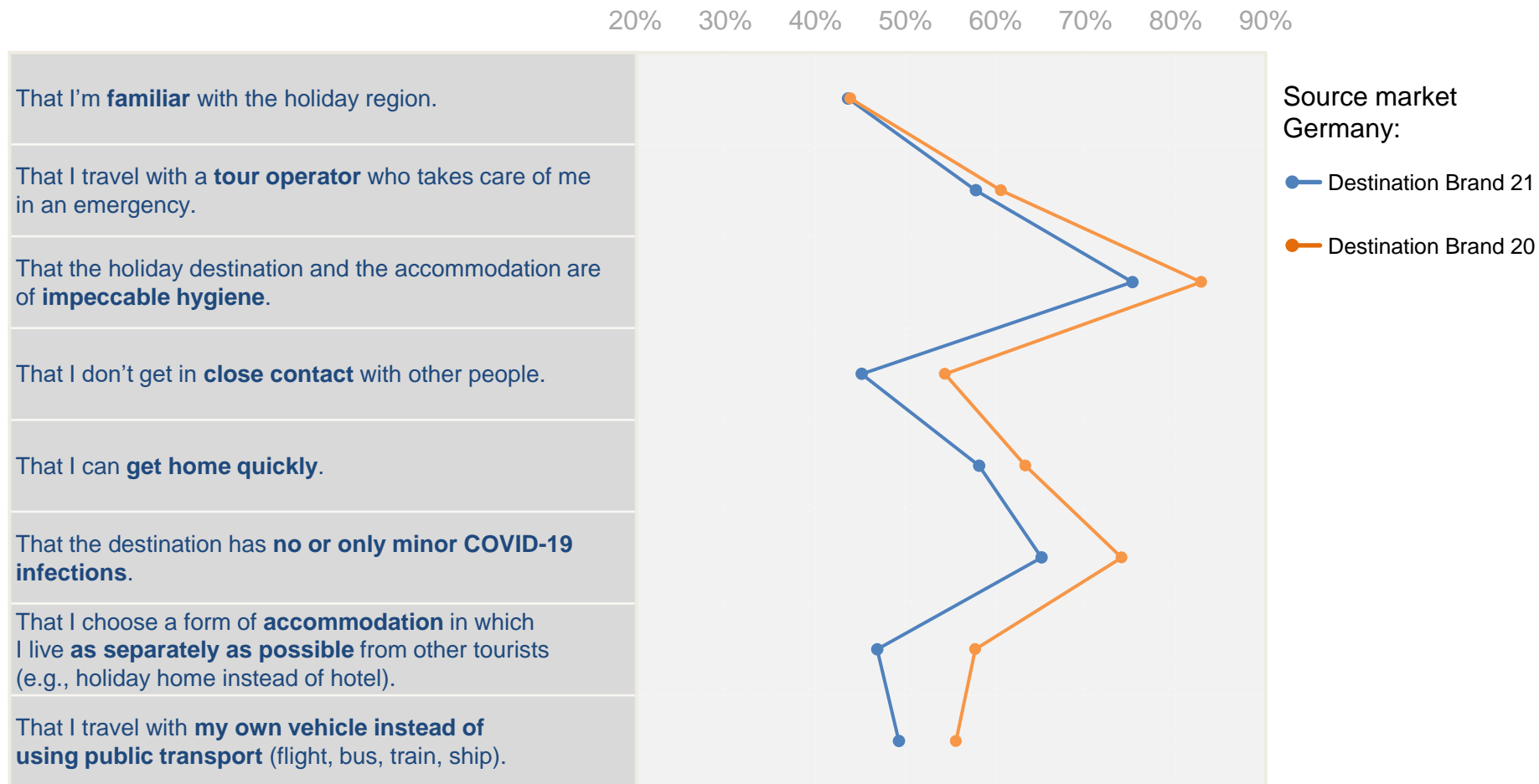
Source: inspektour (international) GmbH / FH Westküste, 2020 / 2021

# **COVID-19: “Strategies” for future holidays**

**Base: „city break enthusiasts“**

# COVID-19: “Strategies” for future holidays

Question: “What are you going to focus on in the future concerning holiday trips?”

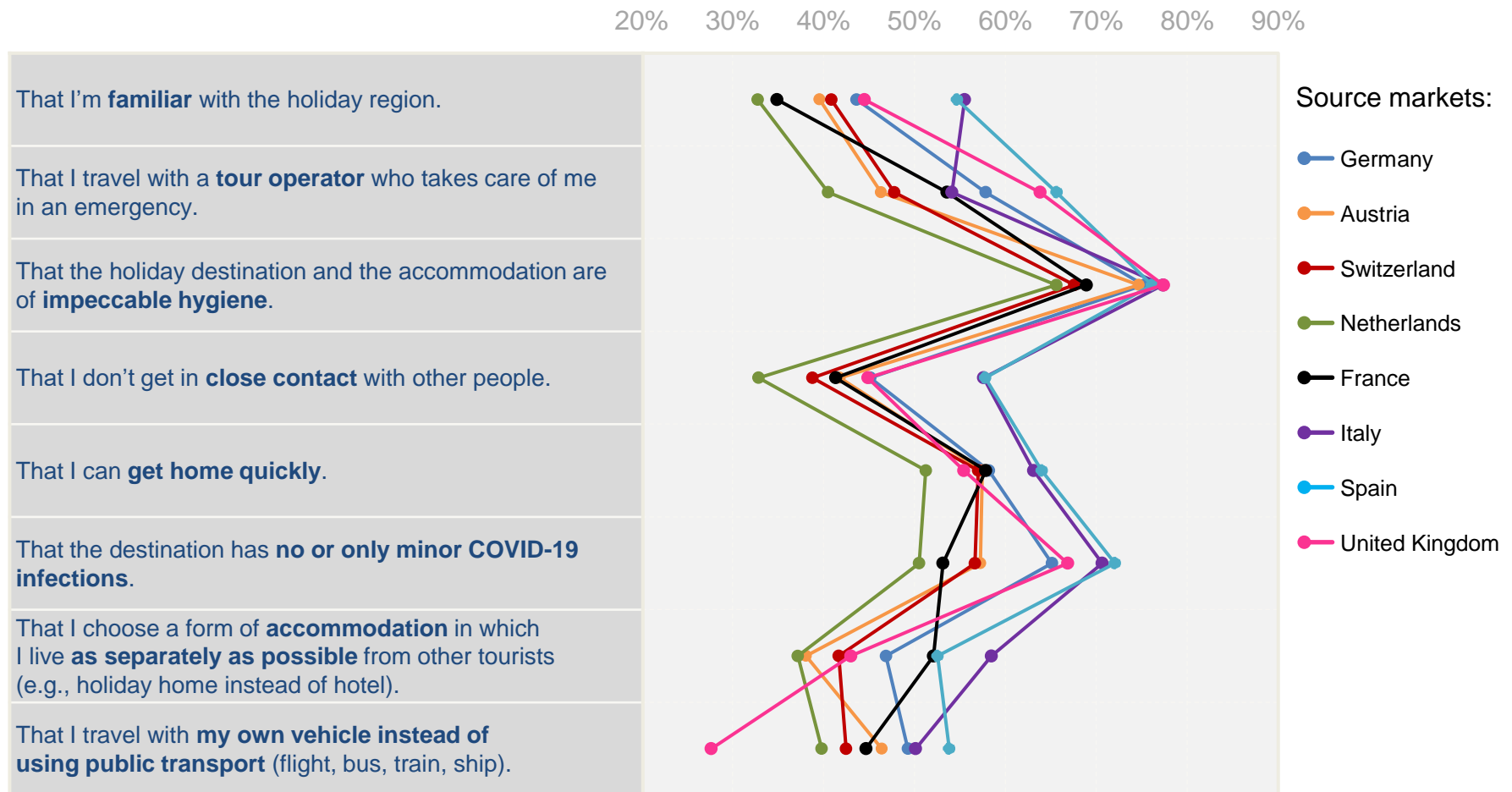


Source: FH Westküste / inspektour (international) GmbH, 2020 / 2021

Base: respondents interested in city breaks in the source market Germany (n = min. 9,541)  
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?”

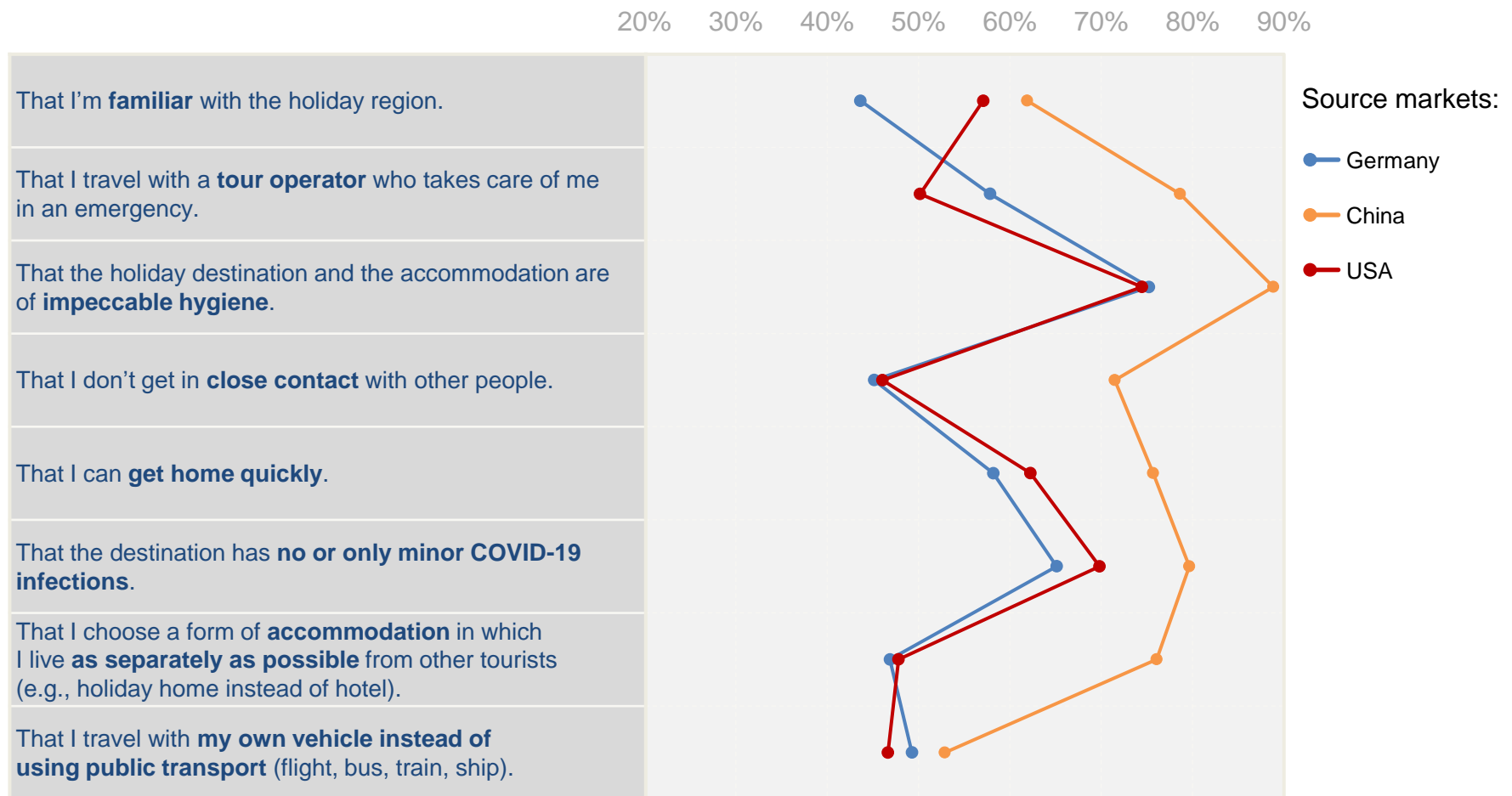


Source: inspektour (international) GmbH, 2021

Base: respondents interested in city breaks in the respective source markets (n = min. 605)  
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?”



Source: inspektour (international) GmbH, 2021

Base: respondents interested in city breaks in the respective source markets (n = min. 453)  
Top-two-box on a scale from “5 = I fully agree” to “1 = I fully disagree”; in % of respondents

# **General intention of “city break enthusiasts” to travel abroad in major European markets + USA and China**

*Intention for:*

*Short trips (with 1-3 overnight stays)*

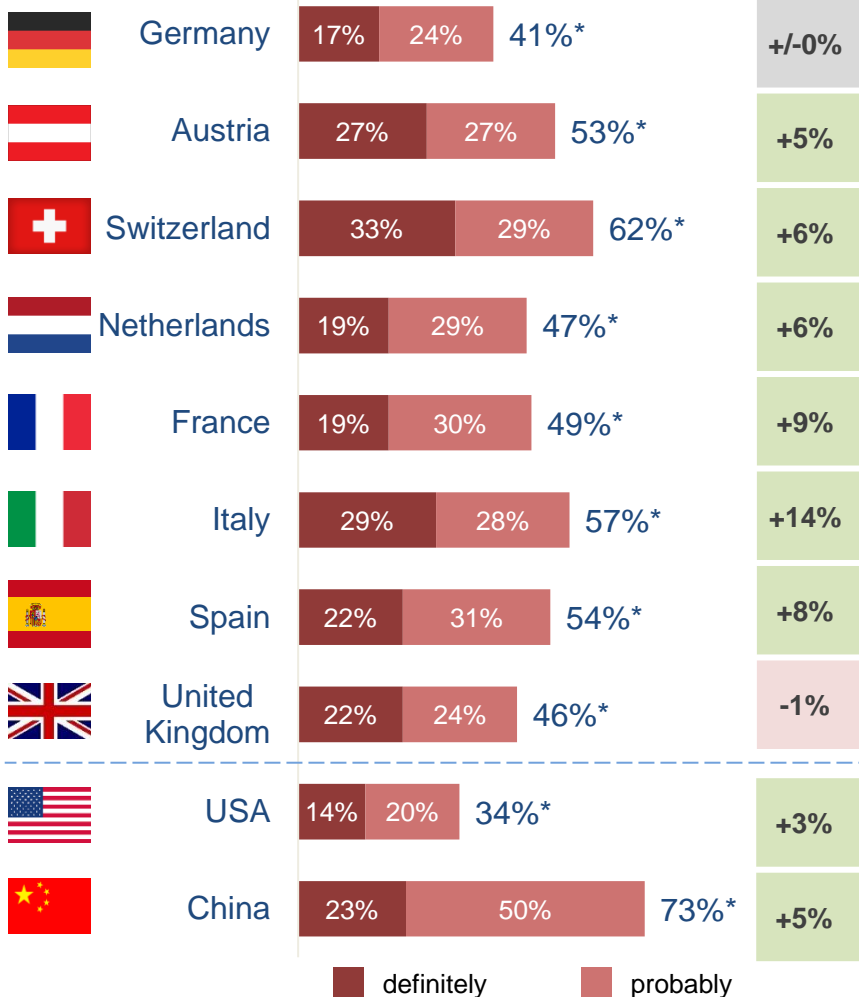
*Longer holiday trips (with 4 or more overnight stays)*



# General intention to travel abroad for short trips

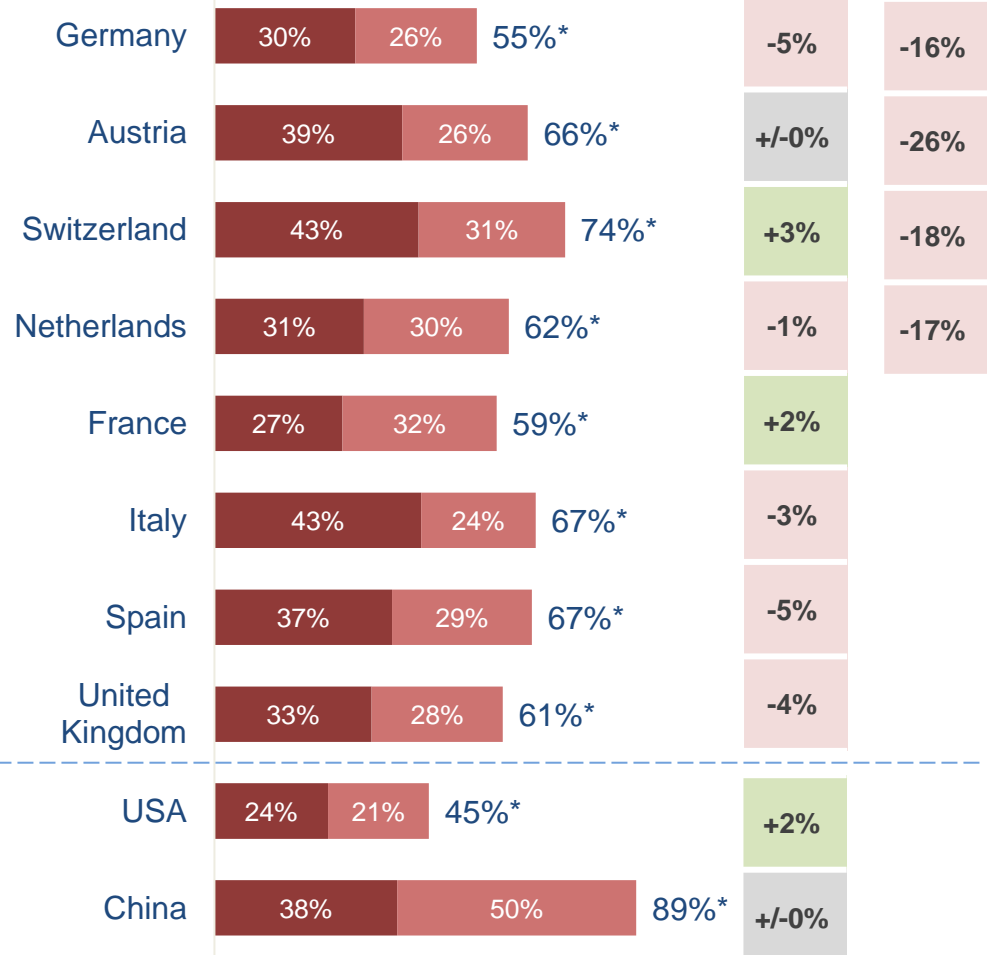
## (Comparison within the next 12 months / 3 years)

### 12 months

 Difference  
to DB20  
(in %-pts.)


### 3 years

 Difference  
to DB20  
(in %-pts.)

 Difference  
to DB18  
(in %-pts.)


Base: respondents interested in city breaks in the respective source markets (n = min. 453)

Top-two-box on a scale from "4 = definitely" to "1 = definitely not"; in % of respondents

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

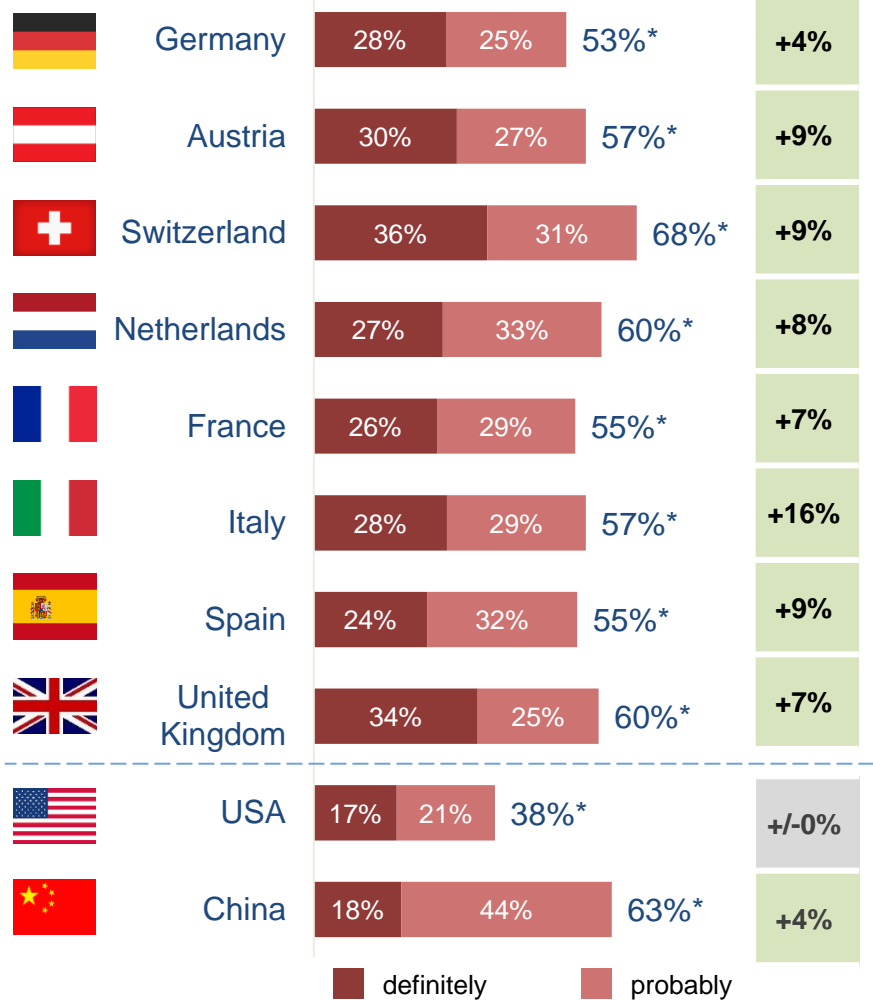
Source: inspektour (international) GmbH / FH Westküste, 2018 / 2020 / 2021

# General intention to travel abroad for longer holiday trips *inspektour*

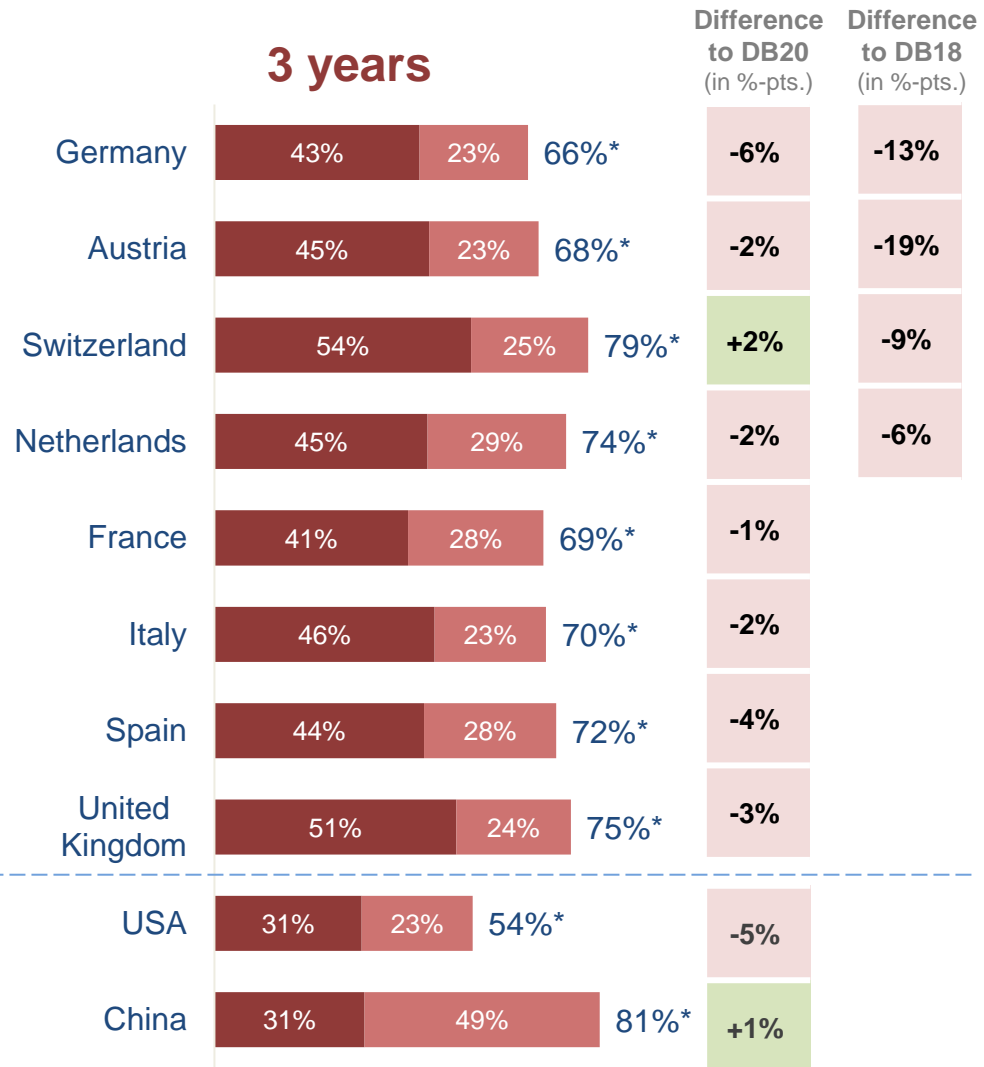
(Comparison within the next 12 months / 3 years)

TOURISM AND MARKET RESEARCH

## 12 months



## 3 years



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

Base: respondents interested in city breaks in the respective source markets (n = min. 453)

Top-two-box on a scale from "4 = definitely" to "1 = definitely not"; in % of respondents

\* 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 “XY trip”.

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

## TOP 5 Top of mind international cities: Particularly suitable for a “city break”

	DE	AT	CH	NL	FR	IT	ES	UK	US	CN
Paris	1		1	1		1	1	1	1	2
London	2	1	2	2	2	2	3		2	5
Rome	3	2	4	5	1		2	3	3	
Vienna	4		5							
Barcelona	5	4		4	4	5		4		
Berlin		3	3	3		4	5			
New York		5			3	3	4	2		4
Venice					5					
Prague								5		
Tokyo									4	3
Sydney									5	
Singapore										1

## TOP 5 Top of mind international cities: Particularly suitable for a “cultural holiday / cultural trip”

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

**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 international cities: TOP 10-Ranking source market Germany DB21/DB18



### DB21 ... to go on a city break

Ranking Cities	Ranking Overall		% of respondents*
1	1	Paris	19.2%
2	2	London	14.8%
3	3	Rome	14.3%
4	7	Vienna	10.0%
5	8	Barcelona	7.7%
6	11	Amsterdam	5.7%
7	13	New York	5.3%
8	14	Prague	5.2%
9	18	Venice	3.4%
10	22	Madrid	2.7%

### DB18 ... to go on a city break

Ranking Cities	Ranking Overall		% of respondents*
1	1	Paris	30.6%
2	2	London	27.3%
3	3	Vienna	19.9%
4	4	Rome	15.0%
5	5	Barcelona	10.5%
6	6	New York	9.3%
7	9	Prague	6.7%
8	11	Amsterdam	5.9%
9	14	Lisbon	3.3%
10	15	Madrid	2.8%

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

Base: all respondents in the source market Germany with valid responses (n = min. 612)

\* Multiple answers possible; in % of respondents

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



DB21 ... to go on a cultural holiday / a cultural trip			% of respondents*
Ranking Cities	Ranking Overall		
1	8	Paris	6.7%
1	8	Rome	6.7%
3	15	London	3.5%
4	18	Vienna	3.1%
5	25	Barcelona	2.3%
6	26	Prague	2.0%
7	32	Dubai	1.6%
8	36	Venice	1.3%
9	39	New York	1.2%
10	45	Salzburg	1.0%

DB18 ... to go on a cultural holiday / a cultural trip			% of respondents*
Ranking Cities	Ranking Overall		
1	4	Rome	10.0%
2	6	Vienna	9.4%
3	7	Paris	8.1%
4	9	London	5.4%
5	11	Prague	4.1%
6	15	Barcelona	3.3%
7	18	Venice	3.0%
8	37	Budapest	1.5%
9	42	Salzburg	1.1%
10	46	Athens	0.9%

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

Base: all respondents in the source market Germany with valid responses (n = min. 540)

\* Multiple answers possible; in % of respondents



# Conclusion and outlook

## General perspectives for city tourism from all source markets

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

- The fundamental **interest in city breaks** has not collapsed even during the 2 year of the pandemic.
- General **intentions to travel abroad**:
  - In terms of **longer holidays abroad**, city break enthusiasts in European source markets have extensive plans within the next 3 years.
  - In the case of **short trips abroad**, plans are still somewhat more restrained overall.
- 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:

**29 March 2022 | 10 a.m. CET**

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

*Language of presentation: German*

**21 April 2022 | 10 a.m. CET**

**DB21-Webinar** The theme competence of **low mountain ranges and Alpine regions**

*Language of presentation: German*

**28 April 2022 | 10 a.m. CET**

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

*Language of presentation: German*

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