



DESTINATION BRAND 23

The image of BeNeLux destinations as tourism and living space - source markets CH, DE, FR + NL

PRESENTATION OF SELECTED KEY RESULTS

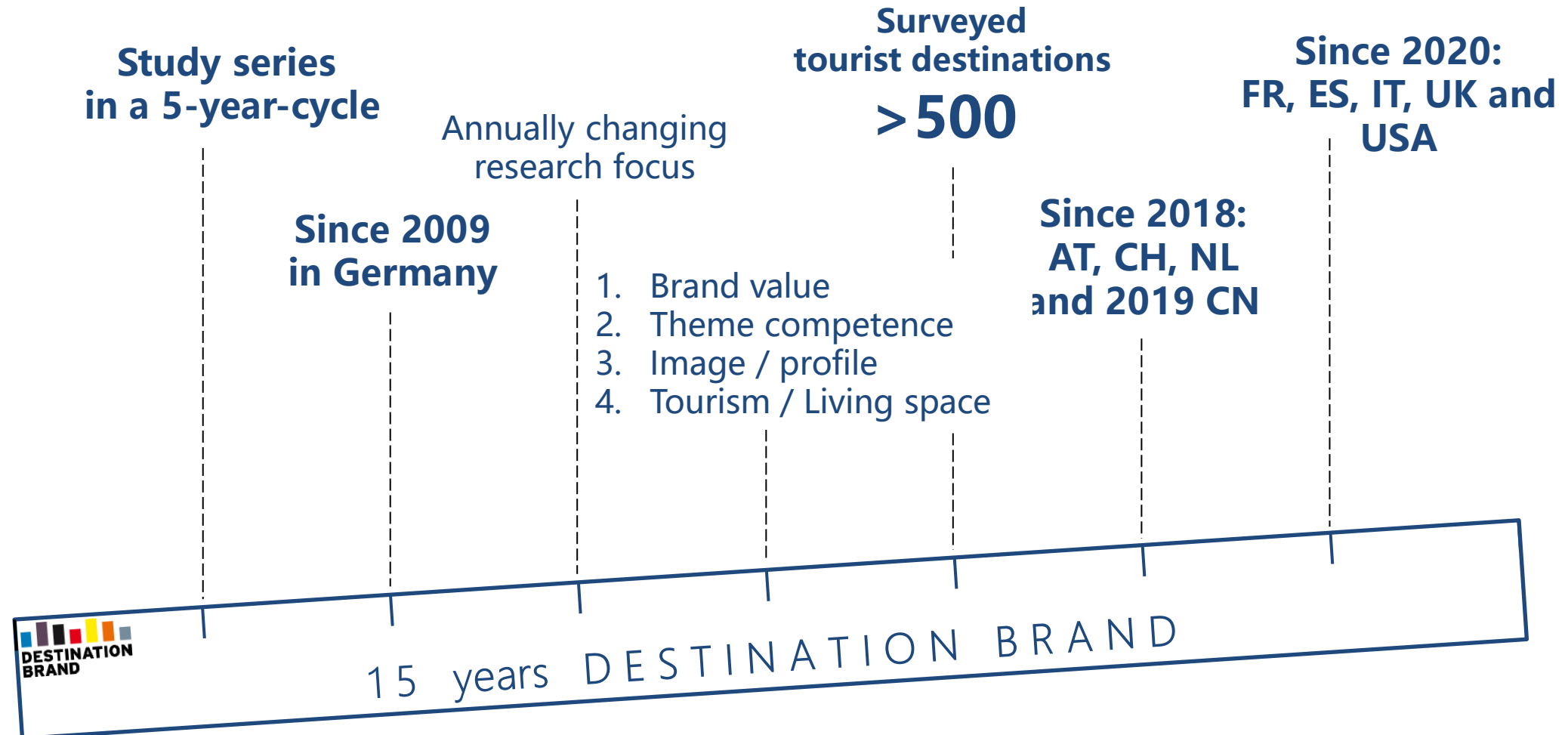
Destination Brand – inspektour



inspektour
TOURISM AND MARKET RESEARCH



The study series DESTINATION BRAND



What can you expect today?

DESTINATION BRAND 23 at a glance

Presentation of selected key results:

**The image of BeNeLux destinations as tourism and living spaces –
source markets CH, DE, FR and NL**

Q&A

DESTINATION BRAND 23

at a glance:

The image of destinations as
tourism and living spaces

DESTINATION BRAND 23 at a glance

**Module 1:
offers +
infrastructure**

**Module 2:
quality of life +
culture of welcoming**

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

**Source market Germany:
Target group analysis
based on
BeST types of
holidaymakers
and SINUS-Milieus**

10 source markets

> 150
tourist destinations

Online survey
Field work: Oct. till Dec. 23



**Presentation of selected key results:
The image of BeNeLux destinations as
tourism and living spaces –
source markets CH, DE, FR and NL**

General intention to travel abroad

Question (short form):

**Do you intend to take a holiday abroad
in the next 12 months / three years?**

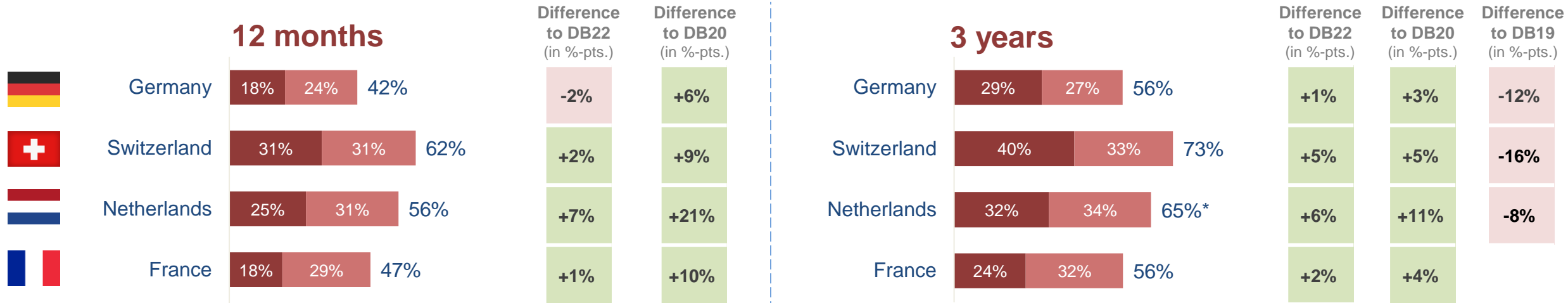
Intention for:

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)



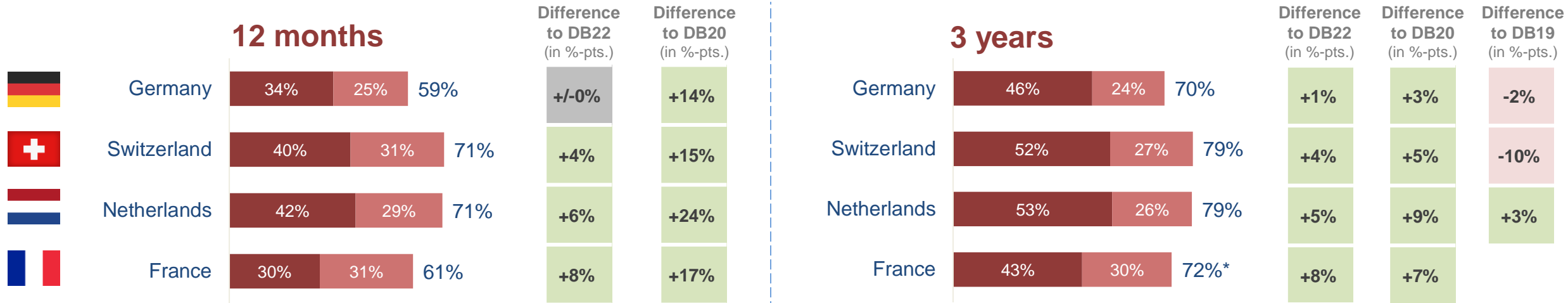
■ definitely ■ probably

Source: inspektour (international) GmbH / IMT of the FH Westküste, 2019, inspektour (international) GmbH / FH Westküste 2020; inspektour (international) GmbH, 2022 / 2023

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

General intention to travel abroad for longer holiday trips

(Comparison within the next 12 months / 3 years)



■ definitely ■ probably

Source: inspektour (international) GmbH / IMT of the FH Westküste, 2019, inspektour (international) GmbH / FH Westküste 2020; inspektour (international) GmbH, 2022 / 2023

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

General interest potential

Question (short form):

**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 Netherlands

Ranking of the considered holiday activities with regard to the general interest potential (Ø = 39%)

Rank		% of cases	Rank		% of cases	Rank		% of cases
1	Relaxing and resting	73%	16	Visiting UNESCO world heritage sites	42%	31	Using wellness services	30%
2	Taking a city break	64%	17	Visiting museums / exhibitions / art museums	41%	32	Hiking	30%
3	Enjoying nature	63%	18	Visiting Christmas markets	41%	33	Taking a camping holiday / caravanning holiday / motorhome holiday	29%
4	Enjoying culinary / gastronomic specialities	58%	19	Undertaking a barrier-free holiday trip	40%	34	Taking a wine tour	28%
5	Discovering regional products / enjoying regional specialities	56%	20	Cycling (not mountain biking)	39%	35	Practising winter sports	25%
6	Visiting castles, palaces and cathedrals	53%	21	Experiencing Contemporary / Modern Culture	37%	36	Practising water sports (not sailing)	23%
7	Enjoying the (small) city flair / atmosphere	52%	22	Enjoying water-based holiday activities	37%	37	Using health services (self-paying, not a prescribed visit to a health spa)	23%
8	Visiting castles, mansions, parks and gardens	51%	23	Spending holidays in the countryside	36%	38	Mountain biking	21%
9	Shopping	50%	24	Visiting industrial heritage sites	33%	39	Visiting film locations	21%
10	Enjoying being by the water	48%	25	Attending events	33%	40	Motorbike riding	17%
11	Swimming and being at the beach	46%	26	Experiencing lively places	33%	41	Having a workcation	16%
12	Using luxury offers	45%	27	Attending culture- / music festivals	32%			
13	Visiting gardens / parks	44%	28	Using family offers	31%			
14	Visiting cultural institutions / using cultural services	43%	29	Being active and involved in sports	31%			
15	Taking a city break with active recreation	42%	30	Undertaking a sustainable holiday trip	30%			

Base: all respondents in the source market Netherlands (n = 1,000)

Source: inspektour (international) GmbH, 2023

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

Abbreviated designations of holiday activities

General interest potential – Source market Netherlands

Ranking of the considered holiday activities with regard to the general interest potential											
Rank		Difference DB19/DB23 in %-pts.	Difference DB22/DB23 in %-pts.	Rank		Difference DB19/DB23 in %-pts.	Difference DB22/DB23 in %-pts.	Rank		Difference DB19/DB23 in %-pts.	Difference DB22/DB23 in %-pts.
1	Relaxation	-5%	-4%	16	UNESCO world heritage sites	+2%	-2%	31	Wellness	+2%	-3%
2	City break	+/-0%	+3%	17	Museums	+/-0%	+/-0%	32	Hiking	+3%	-1%
3	Nature	-1%	+2%	18	Christmas markets	-1%	+/-0%	33	Camping	---	-2%
4	Culinary	+3%	+3%	19	Barrier-free holiday trip	---	-5%	34	Wine tour	---	-1%
5	Regional products / specialities	---	-2%	20	Cycling	+4%	+1%	35	Winter sports	+1%	+/-0%
6	Castles	-5%	-4%	21	Contemporary / Modern Culture	---	-1%	36	Water sports	+6%	+/-0%
7	(Small) city flair	---	-1%	22	Water-based holiday activities	---	-1%	37	Health	+6%	+2%
8	Castles / gardens	---	-2%	23	Countryside	-2%	-1%	38	Mountain biking	+5%	+/-0%
9	Shopping	-1%	-1%	24	Industrial heritage	-2%	-1%	39	Film locations	---	-1%
10	Being by the water	---	---	25	Events	-2%	-2%	40	Motorbike riding	---	---
11	Swimming / beach	+1%	+/-0%	26	Lively places	+3%	+1%	41	Workcation	---	---
12	Luxury offers	+7%	+1%	27	Culture- / music festivals	---	-2%				
13	Gardens / parks	+/-0%	-2%	28	Families	+1%	-3%				
14	Culture	-2%	-4%	29	Sports	+1%	-2%				
15	City break with active recreation	---	-1%	30	Sustainable trip	+3%	-2%				

Source: inspektour (international) GmbH / IMT of the FH Westküste, 2019; inspektour (international) GmbH, 2022 / 2023

Base: all respondents in the source market Netherlands (n = min. 1,000)
Top-two-box on a scale from "5 = very interested" to "1 = not at all interested"; in % of respondents

Abbreviated designations of holiday activities

General interest potential – DB source markets NL, DE, CH and FR

Ranking of the considered holiday activities with regard to the general interest potential

NL		DE		CH		FR						
Rank	TTB	Difference DB22/DB23	Rank	TTB	Difference DB22/DB23	Rank	TTB	Difference DB22/DB23	Rank	TTB	Difference DB22/DB23	
1	73%	-4%	1	75%	-3%	1	74%	-1%	1	70%	-1%	Relaxation
2	64%	+3%	7	59%	-1%	4	63%	-8%	5	67%	+/-0%	City break
3	63%	+2%	2	69%	-3%	5	63%	+/-0%	11	56%	+3%	Nature
4	58%	+3%	4	65%	-2%	2	72%	+2%	2	70%	+1%	Culinary
5	56%	-2%	3	65%	-3%	3	71%	+1%	3	70%	+/-0%	Regional products / specialities
6	53%	-4%	10	52%	-3%	12	49%	-7%	9	59%	+1%	Castles
7	52%	-1%	8	57%	+1%	6	62%	-2%	4	67%	+2%	(Small) city flair
8	51%	-2%	12	51%	+/-0%	16	48%	-9%	6	64%	+1%	Castles / gardens
9	50%	-1%	15	48%	+7%	11	49%	-4%	24	46%	+5%	Shopping
10	48%	--	5	63%	--	7	61%	--	10	56%	--	Being by the water
11	46%	+/-0%	6	62%	-1%	8	58%	-6%	20	50%	-1%	Swimming / beach
12	45%	+1%	34	33%	+5%	33	32%	-4%	35	31%	+7%	Luxury offers
13	44%	-2%	9	55%	+1%	9	51%	-5%	7	64%	+3%	Gardens / parks
14	43%	-4%	18	44%	+2%	17	47%	-4%	8	60%	-1%	Culture
15	42%	-1%	16	48%	+/-0%	13	49%	-1%	14	54%	+2%	City break with active recreation
19	40%	-5%	33	33%	+7%	29	33%	-2%	32	33%	+6%	Barrier-free holiday trip
30	30%	-2%	23	40%	+/-0%	22	40%	-2%	23	47%	+3%	Sustainable trip

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

Source: inspektour (international) GmbH, 2022 / 2023

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

General relevance for destination selection

Question (short form):





Just as people have certain character traits, tourist destinations can also be described using certain characteristics.

How relevant are the following characteristics when you choose a tourist destination for a holiday trip with at least one overnight stay in general (i.e., regardless of a specific tourist destination)?

General relevance – source markets NL, DE, CH and FR

DESTINATION BRAND 23

Ranking of the considered characteristics with regard to the general relevance for destination selection
Base of comparison: Ranking of characteristics

					
1	73%	1 76%	1 77%	1 78%	hospitable
2	71%	3 71%	2 75%	3 77%	welcoming / inviting
3	63%	4 63%	4 66%	5 68%	open to all / non-discriminatory
4	59%	2 71%	3 75%	2 78%	great place to live
5	56%	5 59%	5 63%	4 72%	sociable and easy to approach
6	55%	9 52%	8 53%	7 59%	socially just
7	54%	8 54%	6 59%	6 65%	politically stable
8	51%	7 57%	7 57%	8 56%	ecologically intact
9	37%	10 39%	10 34%	10 42%	economically strong
10	28%	6 58%	9 52%	9 43%	cosmopolitan

Source market comparison (all 10 source markets)

Top 5-Ranking (Top of mind)

Question (short form):





Just as people have certain character traits, tourist destinations can also be described using certain characteristics.

If you think of the characteristic “_____” to which international tourist destinations (countries, cities, regions, etc.) is this characteristic particularly applicable in your opinion?

TOP 5 ranking of “high attractivity” international destinations – all DB source markets

	DE	AT	CH	NL	FR	IT	ES	UK	US	CN
Italy	1	1	1	2	1		1	1	1	
Austria	1		5			5				
Spain	1	4	2	1	2	1		2		4
Norway	4									5
Greece	5	2		5	3	3	5			
Croatia		3								
Germany		5	4	3		4	4		3	2
France			3	4		2	2	3	5	3
USA					4			5		
Portugal					5		3			
Iceland								3		
Switzerland									2	1
Paris									4	

“BeNeLux-destinations” in the source markets DE, CH, NL + FR among the TOP 100 destinations per source market – “high attractiveness”

 ... high attractiveness					 ... high attractiveness					 ... high attractiveness					 ... high attractiveness				
Ranking BeNeLux dest.	Overall ranking		% of resp.*	No. of mentions	Ranking BeNeLux dest.	Overall ranking		% of resp.*	No. of mentions	Ranking BeNeLux dest.	Overall ranking		% of resp.*	No. of mentions	Ranking BeNeLux dest.	Overall ranking		% of resp.*	No. of mentions
1	13	Netherlands	4.0%	26	1	33	Netherlands	1.5%	10	1	11	Luxembourg	4.7%	32	1	8	Netherlands	5.0%	33
2	33	Amsterdam	1.8%	12	2	45	Holland	1.0%	7	2	15	Belgium	3.2%	22	2	18	Belgium	3.2%	21
3	34	Holland	1.7%	11	2	45	Luxembourg	1.0%	7	3	31	Flanders	1.8%	12	3	23	Luxembourg	2.3%	15
4	49	Belgium	1.1%	7	4	57	Belgium	0.7%	5	4	46	Bruges	0.9%	6	4	40	Amsterdam	1.1%	7
5	63	Luxembourg	0.6%	4	5	82	Amsterdam	0.4%	3	5	54	Bonaire	0.6%	4	4	40	Holland	1.1%	7
6	86	Antwerp	0.3%	2						5	54	Ardennes	0.6%	4	6	49	Flanders	0.8%	5
										7	92	Ghent	0.3%	2	7	57	Wallonia	0.6%	4
										7	92	Brussels	0.3%	2	8	66	Brussels	0.5%	3

Source: inspektour (international) GmbH, 2023

Base: All respondents with valid answers in the source markets DE, CH, NL and FR (n = min. 652), * multiple answers possible; in % of respondents

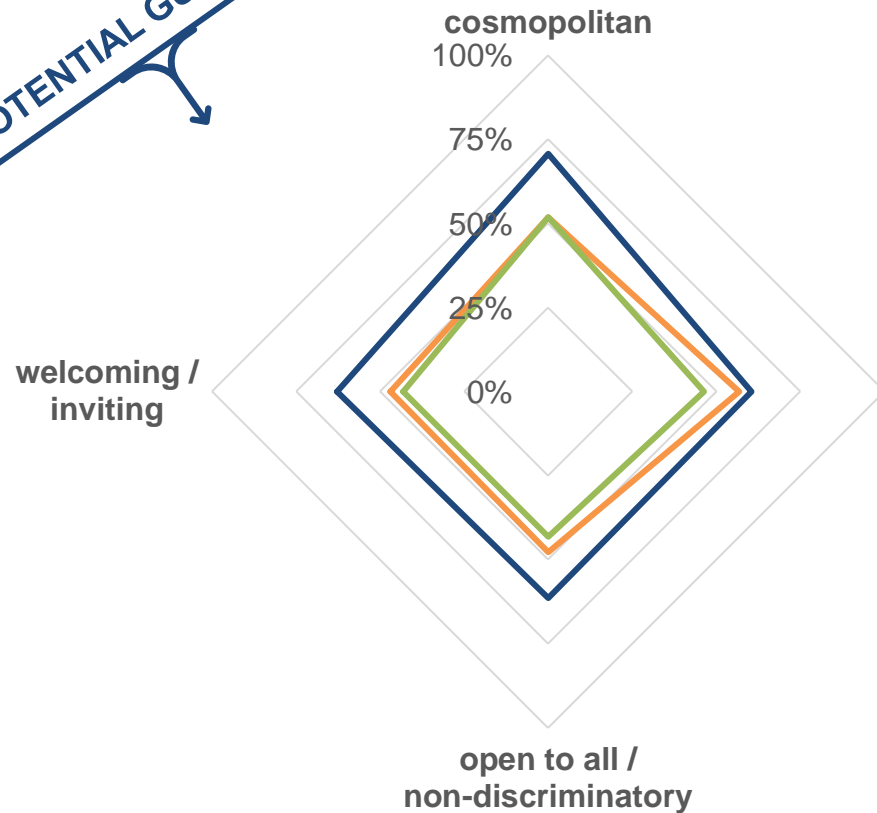
Supported evaluation of characteristics regarding quality of life and culture of welcoming

Question (short form):

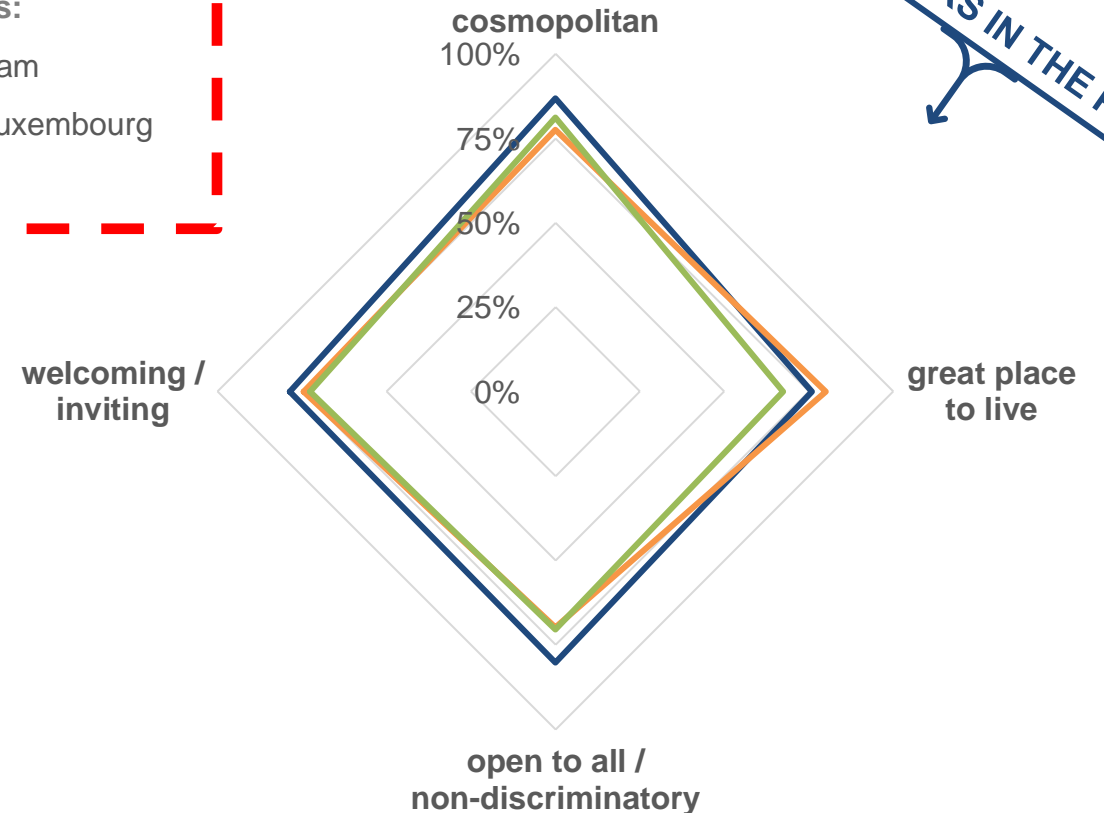
Please indicate to what extent the following characteristics are applicable to the following tourist destination with regard to the quality of life / culture of welcoming there?

Supported evaluation of characteristics regarding quality of life & culture of welcoming –
Source market Germany

POTENTIAL GUESTS



VISITORS IN THE PAST

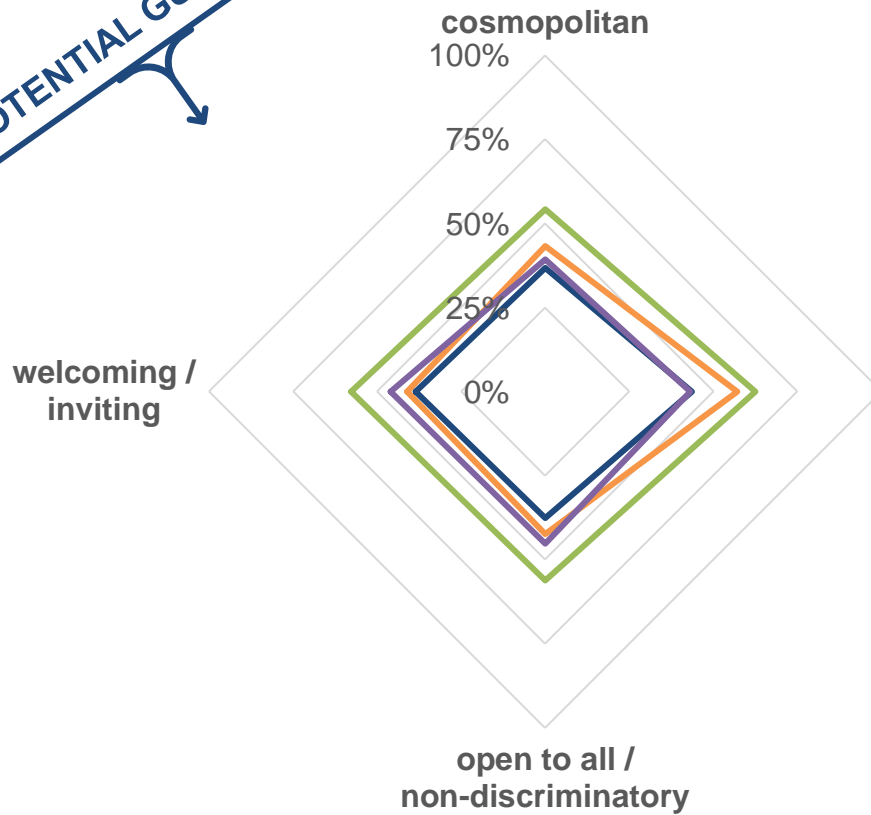


Source: inspektour (international) GmbH, 2023

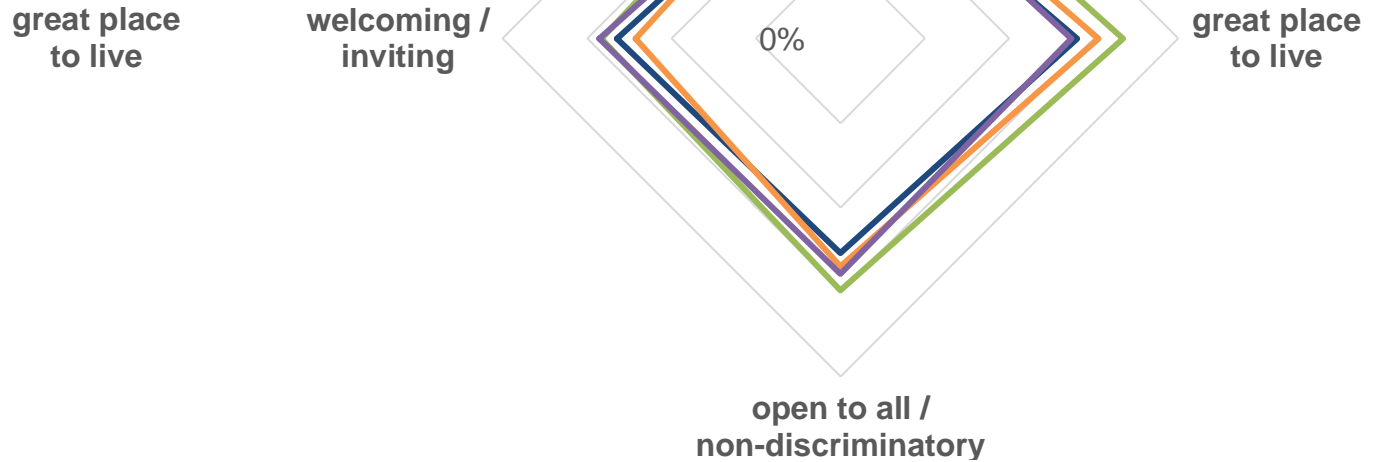
Base: Potential guests (n on average = 373) and Visitors in the past (n on average = 204) in source market Germany
Top-two-box on a scale from "5 = completely applicable" to "1 = not at all applicable"; in % of respondents

Supported evaluation of characteristics regarding quality of life & culture of welcoming –
Source market France

POTENTIAL GUESTS



VISITORS IN THE PAST



Source: inspektour (international) GmbH, 2023

Base: Potential guests (n on average = 461) and Visitors in the past (n on average = 186) in source market France
Top-two-box on a scale from "5 = completely applicable" to "1 = not at all applicable"; in % of respondents



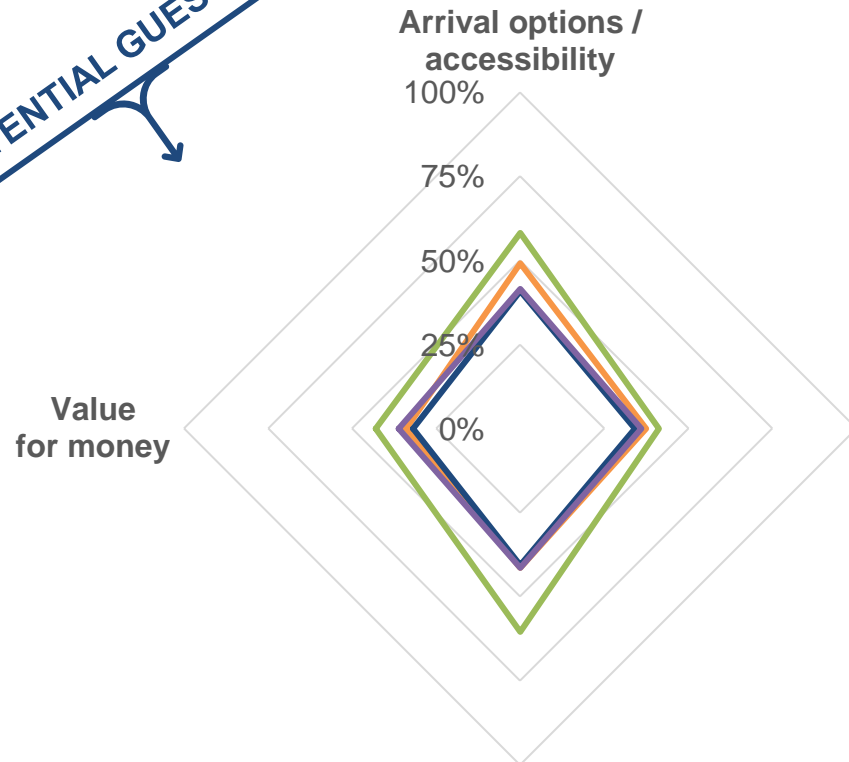
Supported evaluation of offers and infrastructure

Question (short form):

How do you assess the following touristic aspects, offers or infrastructures of the following tourist destination?

Supported evaluation of offers and infrastructure – *Source market France*

POTENTIAL GUESTS



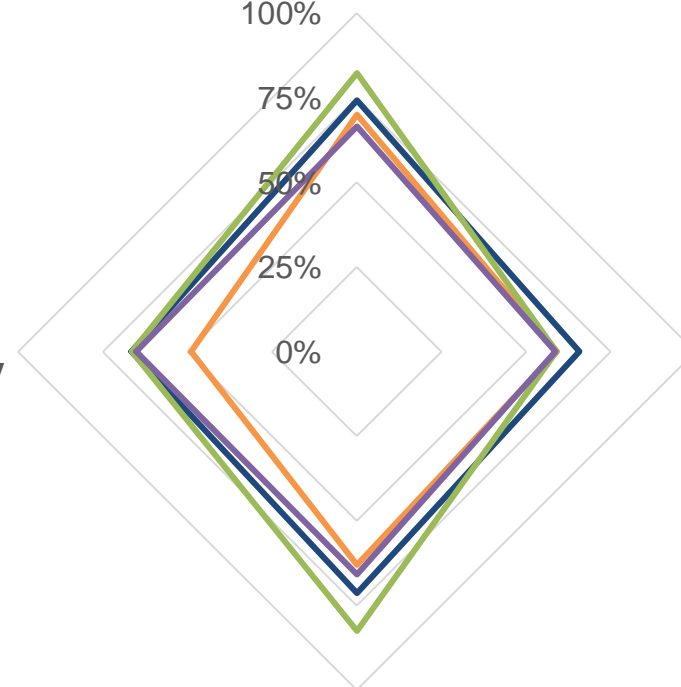
The tourist destination as a whole (overall impression)



Culinary offerings

Value for money

Arrival options / accessibility



VISITORS IN THE PAST

The tourist destination as a whole (overall impression)

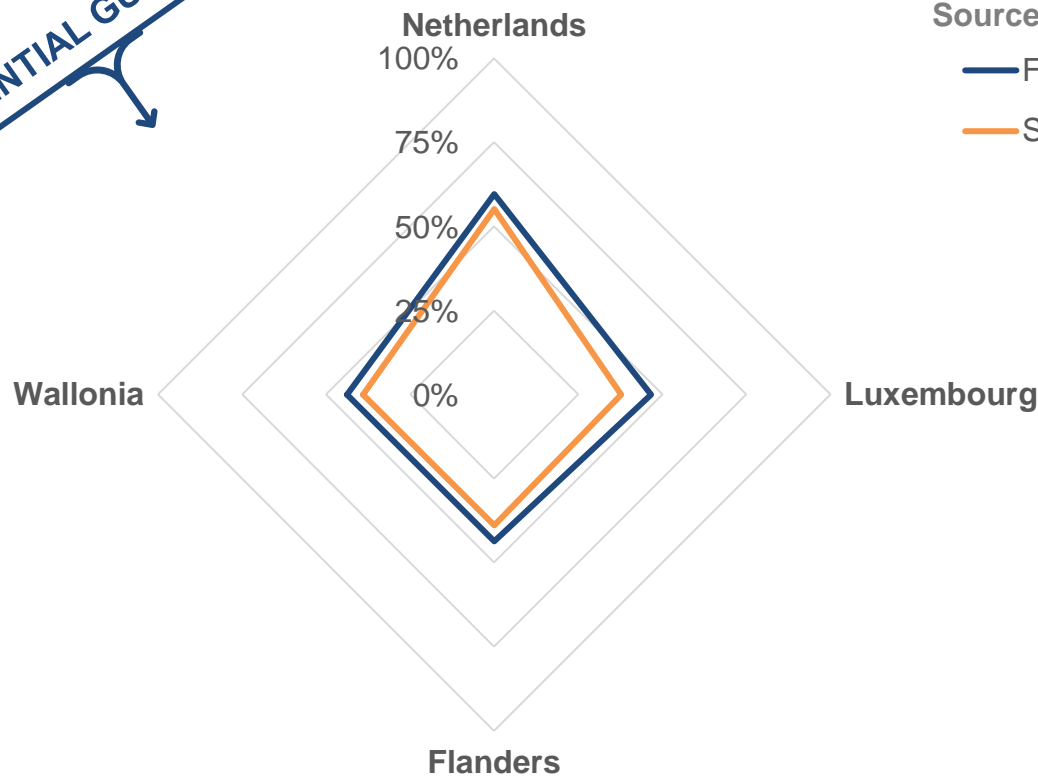
Interest in visiting selected tourist destinations

Question (short form):

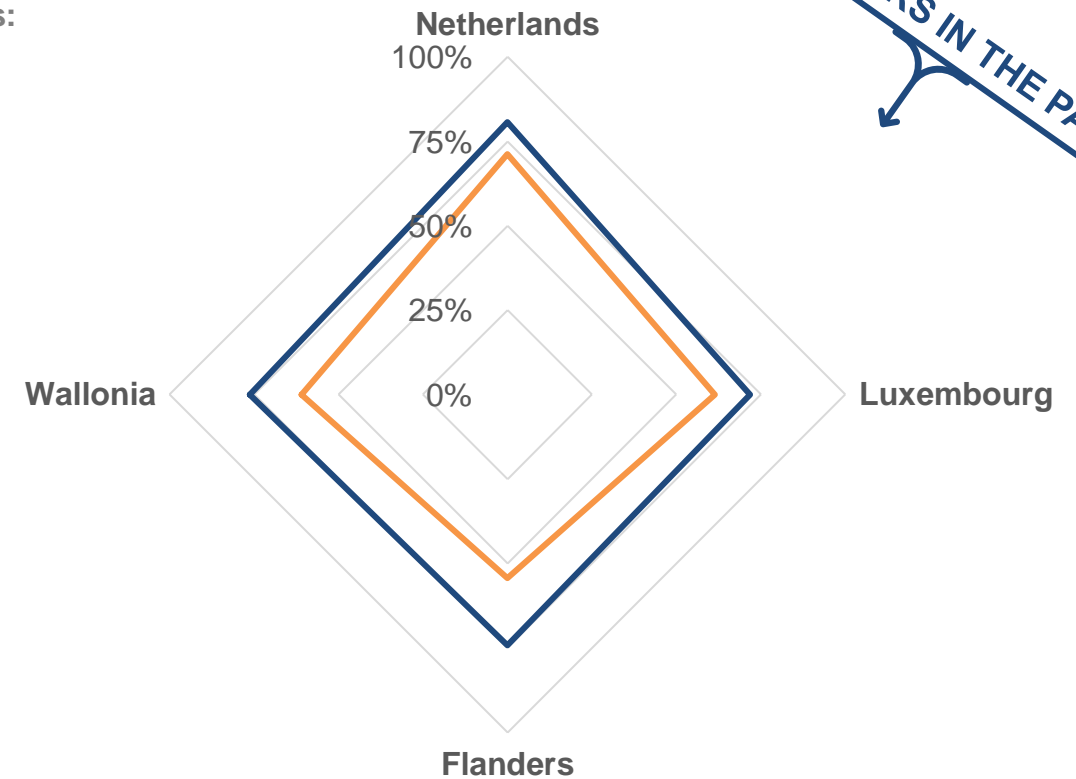
**To what extent would you consider the following international
tourist destinations for a holiday (with at least one overnight stay)
within the next three years?**

“Interest in visiting within the next 3 years” – *Source markets France and Spain*

POTENTIAL GUESTS



VISITORS IN THE PAST

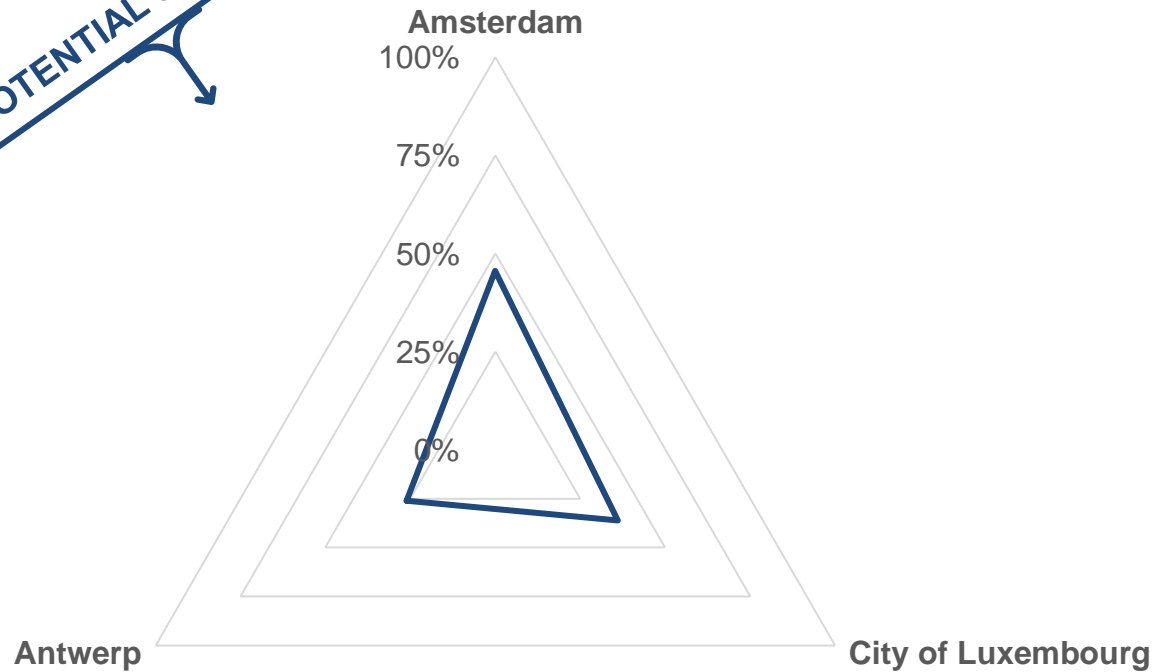


Source: inspektour (international) GmbH, 2023

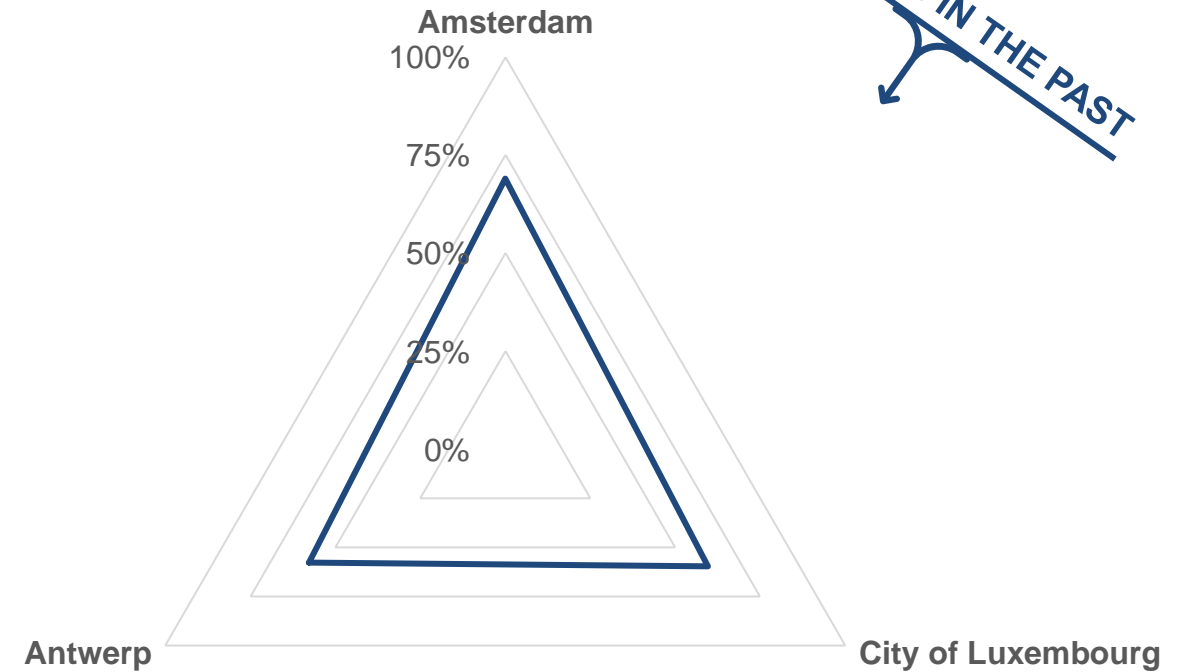
Base: Potential guests (n on average SM FR = 461, SM ES = 324) and Visitors in the past (n on average SM FR = 186, SM ES = 124)
Top-two-box on a scale from “4 = definitely considered” to “1 = not at all considered”; in % of respondents

“Interest in visiting within the next 3 years” Source market Germany

POTENTIAL GUESTS



VISITORS IN THE PAST



Source: inspektour (international) GmbH, 2023

Base: Potential guests (n on average = 373) and Visitors in the past (n on average = 204) in source market Germany
Top-two-box on a scale from “4 = definitely considered” to “1 = not at all considered”; in % of respondents

More Destination Brand 23 webinars

SAVE THE DATE – up-coming Destination Brand 23-webinars:

 **23 April 2024 | 10 a.m.**

“The image of Scandinavian destinations as tourism and living space - source markets DE, UK, USA + CHN”

Language: English

[Registration](#)

 **30 April 2024 | 10 a.m.**

“The image of low mountain ranges / mountain landscapes as a tourism and living space in the source market DE”

Language: German

[Registration](#)

 **7 May 2024 | 10 a.m.**

“The image of coastal destinations as a tourism and living space in the source market DE”

Language: German

[Registration](#)

**Destination Brand 23-webinars:
Every Tuesday at 10 am (CET)**

Thank you very much for your attention!

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)

Tel.: +49 (0) 40. 414 3887 42

E-Mail: ralf.trimborn@inspektour.de



Project manager market research

Alexander Koch

M.A. International Tourism Management

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

E-Mail: alexander.koch@inspektour.de



Data analysis / data preparation

Dörte Waldmann

M.A. Geographie und Tourismus

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

Imprint

► Publishers

inspektour (international) GmbH
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

► Data collection

Ipsos GmbH, Hamburg