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TOURISM AND MARKET RESEARCH

DESTINATION BRAND 22 – MODULE 1

PROFILE CHARACTERISTICS OF TOURIST DESTINATIONS

SOURCE MARKET **FRANCE**

Report for the tourist destination Région de Navarre

► **Note:** Queried designation of Navarre for French respondents = "Région de Navarre"

Customer-oriented study of the profile characteristics of tourist destinations

total of 1,000 respondents | population representative study I 10 individual destinations

Publisher and project leadership:	*inspektour* TOURISM AND MARKET RESEARCH	*inspektour (international) GmbH, Hamburg* *Concepts | Studies Management | Monitoring* *Market Research | Destination Brand Trainings | Coaching*
Data collection:	**Ipsos**	*Ipsos GmbH, Hamburg*
Scientific advisory board:	FH Westküste University of Applied Sciences	*German Institute for Tourism Research* *at the West Coast University of Applied Sciences* *Leading University Institute in Tourism in Germany*

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Outline

Outline

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1. General overview of the study series Destination Brand

The following overview is an excerpt from a detailed, scientifically founded presentation of the Destination Brand study series by the authors Prof. Dr. Bernd Eisenstein, Alexander Koch, Dr. Petra Trimborn and Sylvia Müller. It appeared in the edited volumes on market research for destinations published by Prof. Dr. Bernd Eisenstein in 2017 (for more information see chapter 8.4 in the appendix).

The Destination Brand study series has provided information on the perception of more than 130 destinations in every year since 2009. As branding gained in importance in strategic management of tourist destinations, there was an increasing demand for empirical data that supports competitive strategies of tourist destinations. As a touristic market research instrument, the study series provides a **unique contribution to the comparative summary of the demand-side perceptions of destination brands**. The study series consists of three separate, thematic modules, which each highlight a specific focus of the destination brands as individual studies.

The theoretical starting point and conceptual basis of the study series is the **concept of identity-based brand management**. The concept of identity-based brand management (see the following figure) considers both the brand's internal self-reflection from the supplier's perspective (brand identity) and the external brand perception from the perspective of the demand (brand image).[1] So far, the Destination Brand study series focuses primarily on the perception of tourist destination brands from the perspective of the demand.

The professional management of a destination brand requires **knowledge of the demand-side perceptions of the brand**. Today, it is almost impossible to introduce and further develop a competitive destination brand without having empirical information on the brand image[2] of the destination.

The basic requirement for the generation of a brand name's impact is that the brand has a (target group-specific) level of awareness. In other words, it has reached the consciousness of potential customers (brand awareness, see following figure). This is where the first of the three Destination Brand studies comes in: it measures the **awareness of destination brands** in the context of the four dimensional brand funnel analysis.

The second and third studies in the series are aimed at determining the **benefit dimensions of the destination brands**: the key to successful brand building, as defined by the achievement of a dominant position in the consumer's psyche and differentiation from its competitors, is the formulation of a value proposition by which the brand[3] is positioned on the market.[4] In the course of this positioning, it is important to consolidate the brand identity into a bundle of benefits that clearly focuses on a few consumer-related and purchase-relevant benefit dimensions, taking into account both the functional and the emotional-symbolic benefit dimensions. This also applies to destination brands: The image of the destination brand is created from the associated benefits that are connected by the potential guests with the respective destination.[5]

Since 2009 annually: Information about the perception of more than 130 destination brands

Theoretical starting point: concept of identity-based brand management

1st study: Brand awareness | four dimensional brand funnel

1. General overview of the study series Destination Brand

The **functional benefit dimensions** of destination brands are the subject of the second part of the Destination Brand study series, in which the **theme competences attributed** to each destination brand are measured.

The third part of the Destination Brand study series focuses on the **emotional-symbolic benefit dimension** of the destination brands. The study measures the **attributes and characteristics** ascribed to the destinations by the demand side. The importance of the emotional-symbolic benefit dimension has increased significantly in recent times: the convergence of products and services observable in the competition between destinations – as in many industries – manifests itself in particular through the constant convergence of the functional benefit dimension. This goes hand in hand with the decreasing possibilities for differentiation between destination brands – based on the functional benefit dimension. Instead, the emotional-symbolic field achieves priority importance for the differentiation, with the consequence that brands need to be additionally emotionalized in an identity-specific way[6].

Brand identity

Vision
Where do we want to go

Personality
How do we perform

Values
What do we believe in

Competences
What are our skills

Origin
Where do we come from

Services

Brand promise

Brand expectations

Brand-customer-relationship

Brand behaviour

Brand experience

Brand image

Associations of emotional-symbolical benefits ("sense") of the brand

Associations of functional benefits of the brand

Customer-oriented perception of brand attributes

Brand awareness

Self-perspective of internal target groups

Public perspective of external target groups

2nd study:
Theme competence

3rd study:
Attributes and characteristics

Concept of identity-based brand management

Source: adapted from Burmann, Halaszovich and Hemmann (2012), p. 74.

1. General overview of the study series Destination Brand – *Brand value study*

Aim	– Customer-oriented evaluation of the **brand value** of tourist destinations
Research focus	– 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	– **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 (base 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	DESTINATION BRAND 09	DESTINATION BRAND 12	DESTINATION BRAND 15	DESTINATION BRAND 18	DESTINATION BRAND 20
Source markets	DE	DE	DE	DE | AT | CH | NL	DE | AT | CH | NL | CN | FR | IT | ES | UK | US
Total number of respondents	8,900	15,000	17,000	12,000	31,000
Total number of destinations	141	160	172	76*	200**
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. General 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	— General (i.e., regardless of a specific destination) interest in holiday activities — Supported theme suitability per tourist destination (for 5 general themes and 5 specific themes) — Theme suitability top of mind per tourist destination — Target group- and competitor analysis

Survey design

For all sub-studies	— **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 (base 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	DESTINATION BRAND 10	DESTINATION BRAND 13	DESTINATION BRAND 16	DESTINATION BRAND 18	DESTINATION BRAND 21
Source markets	DE	DE	DE	DE | AT | CH | NL	DE | AT | CH | NL | CN | FR | IT | ES | UK | US
Total number of respondents	10,500	16,000	17,000	12,000	28,000
Total number of destinations	141	160	172	76*	194**
Total 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. General overview of the study series Destination Brand – *Profile study*

Aim	— Customer-oriented evaluation of the **profiles / images** of tourist destinations ($\triangleq$ associations of the **emotional-symbolic benefits** of the destination brands)

Research focus	**Module 1 (M1):** — General (i.e., independent of a specific destination) relevance of profile characteristics when choosing a tourist destination — Supported evaluation of characteristics per destination (for 5 general and 5 specific characteristics) — Target group- and competitor analysis **Module 2 (M2):** — Spontaneous associations per tourist destination

Survey design

For all sub-studies	— **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 (base 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	DESTINATION BRAND 11	DESTINATION BRAND 14	DESTINATION BRAND 17	DESTINATION BRAND 19	DESTINATION BRAND 22
Source markets	DE	DE	DE	DE | AT | CH | NL | CN	DE | AT | CH | NL | CN | FR | IT | ES | UK | US
Total number of respondents	10,000	11,000	17,000	8,000	24,000
Total number of destinations	M1: 104 M2: 22	M1: 115 M2: 21	M1: 170 M2: 170	55*	166**
Total number of characteristics	6 general characteristics + 50 specific characteristics	6 general characteristics + 56 specific characteristics	8 general characteristics + 59 specific characteristics	Only spontaneous associations	5 general characteristics + 44 specific characteristics

* In the study DB19 some destinations were surveyed in different source markets; distribution: DE = 45 | AT = 8 | CH = 12 | NL = 8 | CN = 10.
** In the study DB22 some destinations were surveyed in different source markets; distribution: DE = 151 | AT = 10 | CH = 10 | NL = 10 | CN = 10 | FR = 10 | IT = 10 | ES = 10 | UK = 10 | US = 10.

Outline

2.1 Methods 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)** in 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 characteristics when choosing a tourist destination
	– Module 1: **Supported evaluation of characteristics** per tourist 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 tourist destination
	– **Standard target group analysis** based on:
	   – sociodemographic criteria
	   – the general (i.e., regardless of a specific destination) interest in holiday activities
	   – the general (i.e., regardless of a specific destination) relevance of characteristics when choosing a tourist destination
	– Additional target group analyses (chargeable) according to:
	   – the "Sinus Milieus® Germany"* and the "Sinus-Meta-Milieus®"* by the SINUS-institute as well as
	   – the "BeST types of holidaymakers"* by the FH Westküste
	
	* These options for target group definition exist exclusively for the source market Germany.

2.1 Methods of the profile study Destination Brand 22

Survey design	
	– **166 destinations** (several destinations were surveyed in more than one source market; distribution among source markets: DE = 151 | AT = 10 | CH = 10 | NL = 10 | CN = 10 | FR = 10 | IT = 10 | ES = 10 | UK = 10 | US = 10)
	– **Total sample size:** 24,000; per destination: 1,000 (supported evaluation of characteristics and spontaneous associations); distribution among source markets: DE: 15,000 | all other source markets 1,000 each
	– **Online survey in the respective national language** (remark: CH = German & French)
	– **Quota sample** based on cross quota age/sex and regional origin
	– **Representative** of the respective population aged 14-74 years living in private households (deviation only in the source market China*): DE = 61.81 m people; AT = 6.59 m people; CH = 6.02 m people; NL = 12.78 m people; FR = 46.61 m people; IT = 45.51 m people; ES = 34.30 m people; UK = 47.95 m people; US = 246.50 m people

* 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.

Survey period	
	– **October / November 2022**

2.1 Methods of the profile study Destination Brand 22

As already described more in detail in chapter 1, scientifically-founded insights into the own profile are of crucial importance for tourist destinations in order to achieve a successful target-oriented strategic development of the destination marketing.

Against this background, the study Destination Brand 22 conducts a **customer-oriented evaluation of profile characteristics** (module 1) as well as a **measurement of spontaneous associations** (module 2) to a multitude of tourist destinations based on population-representative online surveys.

For the realisation of the study series Destination Brand, inspektour works together with a competent **partner network**, which offers a holistic set of methodological competences. The German Institute for Tourism Research of the FH Westküste (University of Applied Sciences) gives meaningful contribution as the scientific advisory board of the study. The database of the well-established study is assembled in cooperation with the market research company Ipsos.

While the predecessor profile studies in the years 2011, 2014 and 2017 already covered a comprehensive part of the German domestic tourist destinations, the study Destination Brand 19 widened the scope with regard to the measurement of the spontaneous associations (module 2) and additionally encompassed the four source markets Austria, Switzerland, the Netherlands and China. On top of the named source markets, **the profile study Destination Brand 22 has also been conducted for the first time in France, Italy, Spain, the United Kingdom and the USA.**

In total, **24,000 respondents were surveyed online in their respective national language** in the course of the study Destination Brand 22. The sample sizes per source market are as follows: DE: n = 15,000 | all other source markets each: n = 1,000. The field work was carried out, managed and controlled by the Ipsos GmbH. In this process, in each source market (sub-) samples of 1,000 respondents were used. Each of these (sub-) samples is **representative** of the respective population aged 14-74 years living in private households (under application of a cross quota "age/sex" and an independent quota "regional origin").

Competent partner network

Survey in the source markets (DE | AT | CH | NL | CN | FR | IT | ES | UK | US)

Population-representative online surveys

2.1 Methods of the profile study Destination Brand 22

Only the survey in the source market China constitutes a deviation from the previous representativeness statement. It is 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. In the main part of the survey on destination-specific questions regarding the general relevance of characteristics for destination selection and the supported evaluation of characteristics per tourist destination **in the source market China**, only those interviewees took part, who are considered to have an **"affinity to travel abroad"** according to additional preceding filter questions (n = 1,000). For this purpose, the respondents had to fulfill at least one of the following two conditions:

- **Condition 1:** have travelled abroad in the last 3 years (with at least 1 overnight stay) and / or
- **Condition 2:** hold a valid passport (or have applied for it or plan to apply for it within the next 3 years) and are willing to undertake a short trip (with 1 – 3 overnight stays) and / or a longer holiday trip (with 4 or more overnight stays) abroad within the next 3 years

Taking up the general approach of strategic management, the profile study makes it possible to conduct a **three-dimensional analysis of the competitive situation** (see the following figure). Thereby, the general relevance for destination selection (1st analysis dimension "demand"; see chapters 3.1 + 4), the evaluation of profile characteristics of the destination (2nd analysis dimension "supply"; see chapters 3.2 + 5) as well as the performance of the destination compared to the competitors (3rd dimension "competition"; see chapters 3.3 + 6) are comprehensively analysed. The queried designation of Navarre for French respondents was "Région de Navarre".

In the following, the key features of the three analysis dimensions will be described briefly.

Representativeness in the source market China

Three-dimensional analysis of the competitive situation

2.1 Methods of the profile study Destination Brand 22
Three-dimensional analysis of the competitive situation

SUPPLY

Customer-oriented evaluation of profile characteristics Région de Navarre

Competitive situation
Région de Navarre

DEMAND

General relevance of profile characteristics when choosing a tourist destination

COMPETITION

Competitor analysis Comparisons with selected destinations per category / per profile characteristic
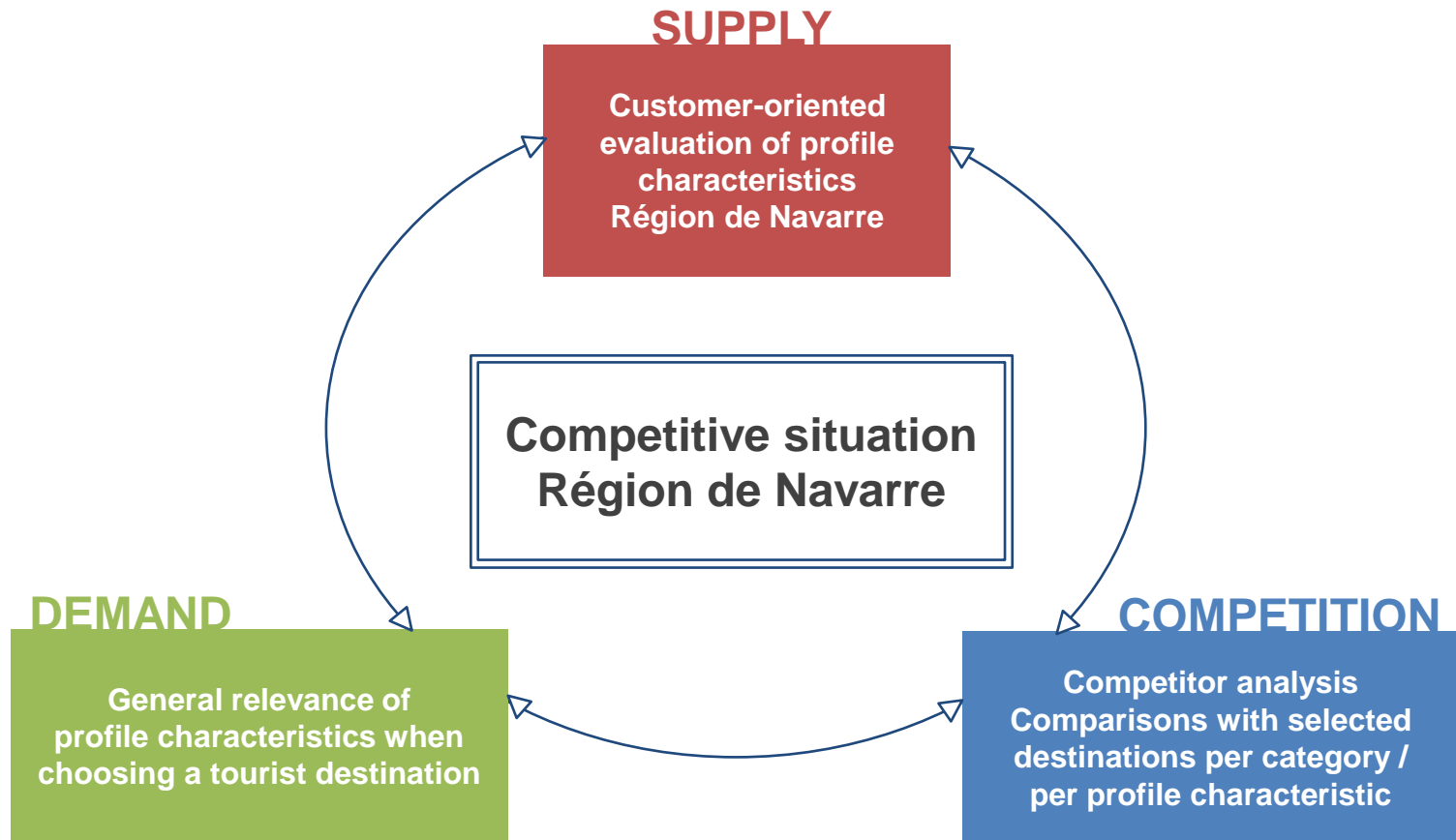
2.1.1 Analysis dimension 1: Demand

In accordance with the predecessor profile studies, the recent edition Destination Brand 22 also centres on the measurement of the **general (i.e., regardless of a specific destination) relevance of characteristics for destination selection** among the respective represented population (see chapters 3.1 + 4). The general relevance is measured on the basis of the proportion of the top-two-box on a scale from "5 = very relevant" to "1 = not at all relevant".

In the study Destination Brand 22, the general relevance was surveyed for **49 profile characteristics in an uniform manner for all ten source markets** (for a detailed overview of the characteristics taken into account, see chapter 2.2).

The addition or omission, as well as some minor formulation adjustments, of individual characteristics compared to the predecessor studies Destination Brand 17-14-11 is based on a comprehensive review of the current status of the previous pool of profile characteristics on the part of inspektour. In the new compilation of the pool of characteristics, interim trend developments, the expansion of the study to include international source markets and the associated change in the relevance of individual characteristics at the international level were also taken into account. Furthermore, in Destination Brand 22, as in every edition of the profile study, individual additional profile characteristics have found their way into the pool of characteristics of the current study by means of the individual selection option for the participating clients in the context of their commissioning.

General relevance of characteristics for destination selection

49 profile characteristics surveyed in an uniform manner for all ten source markets

Additional explanation on the composition of the considered pool of characteristics

2.1.2 Analysis dimension 2: Supply

This second central analysis dimension of Destination Brand 22 focuses on the question, to which extend the represented population considers **a set of at least 10 different profile characteristics to be applicable** to the respective tourist destination. This set consists of 5 general characteristics as well as most commonly 5 additional specific characteristics.

The general characteristics "attractive", "authentic / genuine", "hospitable", "offering a lot of variety" and "sustainable" were uniformly examined for all considered destinations independently of the source market. In the case of the specific characteristics, 5 up to 10 individually relevant characteristics could be selected by the responsible authority for the respective destination based on a pre-defined pool of characteristics.

The **evaluation of profile characteristics** was carried out by those respondents to whom the respective destination is known – even if only be name ("supported evaluation of profile characteristics"). The attributed applicability of profile characteristics is measured on the basis of the proportion of the top-two-box on a scale from "5 = completely applicable" to "1 = not at all applicable".

The number of respondents for all considered destinations with regard to the evaluation of profile characteristics is 1,000. This comprehensive sample size generally permits the conduction of **more detailed and statistically secured analyses**. Among others, this encompasses a differentiation of the evaluated profile characteristics by the following highly relevant sub-groups (see chapter 3.2):

- **"affine to the characteristic":** Respondents for whom the respective characteristic is generally relevant when choosing a destination for a holiday trip with at least one overnight stay (top-two-box value)
- **"visitors in the past":** Respondents who have already holidayed in the tourist destination (with at least one overnight stay)

In the case of international destinations (from the perspective of the respective source market), further analyses for the high potential sub-group of respondents with a **"distinct intention to travel abroad"** need to be additionally emphasized. This group of respondents definitely intends to undertake a short trip (with 1 – 3 overnight stays) and / or a longer holiday trip (with 4 or more overnight stays) abroad within the next three years.

For each destination: applicability assessment regarding 10 characteristics

Differentiation by highly relevant sub-groups

Analysis of the sub-group "distinct intention to travel abroad"

2.1.2 Analysis dimension 2: Supply

Furthermore, in the course of the **standard target group analysis** of the individual reports (see chapter 5.3), the evaluation of the profile characteristics is differentiated by up to 6 individually selected target groups. They can be defined based on 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 for destination selection, the intention of the respondents to travel abroad / domestically as well as a combination of these aspects.

Standard target group analysis

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

– **the "Sinus Milieus® Germany" and "Sinus-Meta-Milieus®"** which are based on people's attitudes and orientations, values, lifestyles and life goals as well as social backgrounds and positions

Additional comprehensive options of the target group analysis in the source market Germany

– **the "BeST types of holiday makers"** which are based on the beliefs and benefit expectations of the German holiday makers (this typology was developed by the German Institute for Tourism Research at the FH Westküste in the year 2020)

For the analysis of the tourist destination Région de Navarre in the source market France, Dirección General de Turismo, Comercio y Consumo Navarra chose the target group definitions shown in the introduction to chapter 5 as part of the standard target group analysis.

In addition to the target group analysis, the report includes **further bivariate evaluations** (see chapter 5.2), in which the evaluated profile characteristics was **differentiated according to the following eight socio-demographic criteria**: sex, age groups, formal education, household size, number of children under 14 years of age in the household, net household income, town size and regional origin. These evaluations provide a comprehensive basis for identifying further attractive market potentials.

Additional differentiation according to 8 socio-demographic criteria

2.1.3 Analysis dimension 3: Competition

In total, **166 different tourist destinations** were included in the survey of the study Destination Brand 22 running in the period of October and November 2022 based on identical methods compared to the predecessor studies. The selection of the destinations to be considered was done by the inspektour (international) GmbH.

Since some of the destinations were surveyed in two or more source markets, the ten source market-specific destination pools cover a higher number of tourist destinations in total. Their distribution is as follows: DE = 151 | all other source markets each = 10.

As a unique feature of the study series Destination Brand, the substantial destination pool facilitates the conduction of **considerable comparisons with the competitive environment**. In this context, a comprehensive competitor analysis representing a central component of this report was carried out. The comparison with the competitors was made on the basis of "all respondents", the respondents being "affine to the characteristic" as well as in the case of international destinations the respondents with a "distinct intention to travel abroad" (single overview: see chapter 3.3 | extensive detailed rankings of all considered destinations based on "all respondents": see chapter 6).

The methodological explanations conclude with the following two additional remarks:
- Please note that any deviations of the sum of added percent values are due to rounding differences.
- For further details, please refer to the **appendix**, which includes among others some **descriptive reading examples** as well as a glossary of the most important terms.

In total: 166 different tourist destinations

Comprehensive competitor analysis

Appendix: Descriptive reading examples

Outline

2.2 Overview of the considered profile characteristics

General characteristics
(for all destinations)

1. attractive
2. authentic / genuine
3. hospitable
4. offering a lot of variety
5. sustainable

Specific characteristics
(individual selection of tourist destination Région de Navarre)

6. accessible
7. active
8. amazing
9. bicycle friendly
10. casual / chill
11. charming / endearing
12. Christmasy
13. contemporary
14. cosmopolitan
15. culturally interesting
16. decelerating / liberating
17. diverse landscape
18. eventful
19. **family-friendly**
20. great place to live
21. healthy
22. high-quality / good for holidaying
23. historically interesting
24. honest / credible
25. informative / educational
26. **inspiring**
27. intensive / exhilarating

28. interesting regional architecture / design
29. international
30. LGBTQI+ friendly
31. lively / hip
32. **natural**
33. not crowded / insider tip
34. opportunity to experience city flair and do activities in the surrounding area
35. opportunity to experience digitally
36. **opportunity to experience wine culture**
37. peaceful / calm
38. pleasant
39. refreshing
40. restorative / relaxing
41. rich in contrast
42. **rural / scenic**
43. safe
44. service-oriented
45. sporty
46. surprising
47. traditional
48. unique
49. vitalising

Note 1: Last survey taken into consideration in October / November 2022
Note 2: Completely surveyed characteristic: "LGBTQI+ friendly (i.e., open / tolerant / friendly towards people who are not heterosexual or whose gender identity does not align with the binary model of male and female)"
Source: inspektour (international) GmbH, 2022

Outline

2.3 Overview of the considered tourist destinations

	DE	AT	CH	NL	CN	FR	IT	ES	UK	US
1. Aachen	■									
2. Ahr Valley	■									
3. Allgäu	■									
4. Alpine region Tegernsee-Schliersee	■									
5. Alpine world Karwendel	■									
6. Ammergau Alps	■									
7. Amsterdam					■					■
8. Austria					■		■			■
9. Bad Sooden-Allendorf	■									
10. Baden-Württemberg	■		■							
11. Baltic Resort Binz	■									
12. Baltic Resort Kühlungsborn	■									
13. Baltic Sea	■									
14. Baltic Sea Schleswig-Holstein	■									
15. Basel			■							
16. Bavaria	■									
17. Bavarian Forest	■									
18. Bergisches Land	■									
19. Berlin	■	■			■	■	■	■		■
20. Black Forest	■									
21. Bonn	■									
22. Bordeaux								■		
23. Borkum	■									
24. Brandenburg	■									
25. Bremen	■									
26. Bremerhaven	■									
27. Burgenland	■									
28. Büsum	■									
29. Carinthia	■									
30. Chiemgau - Chiemsee	■									

	DE	AT	CH	NL	CN	FR	IT	ES	UK	US
31. Cologne	■									
32. Copenhagen					■					■
33. Cottbus	■									
34. Dahme Lake District	■									
35. Darmstadt	■									
36. Denmark									■	
37. Dresden							■			
38. Dresden Elbland	■									
39. Duisburg	■									
40. Düsseldorf	■									
41. East Frisian Islands	■									
42. Eifel	■									
43. Erfurt	■									
44. Fichtel Mountains	■									
45. Finland									■	
46. Fläming	■									
47. Flanders	■	■	■	■	■	■	■	■	■	
48. Florence								■		
49. Föhr	■									
50. Franconia	■									
51. Franconian Lake District	■									
52. Frankfurt on the Main	■									
53. FrankfurtRhineMain	■									
54. Freiburg in the Breisgau	■									
55. Füssen in the Allgäu	■									
56. Garmisch-Partenkirchen	■									
57. Germany		■	■	■	■	■	■	■	■	■
58. GrimmHome NorthHesse	■									
59. Halle (Saale)	■									
60. Hamburg	■									

Note 1: The source markets are marked in green, if the respective destination was surveyed there in the course of the study Destination Brand 22.
Note 2: Last survey taken into consideration in October / November 2022

Source: inspektour (international) GmbH, 2022

2.3 Overview of the considered tourist destinations

	DE	AT	CH	NL	CN	FR	IT	ES	UK	US
61. Hanover	■									
62. Harz	■									
63. Havelland	■									
64. Heidelberg	■									
65. Hesse	■									
66. Holiday region Bernkastel-Kues - Moselle	■			■						
67. Holstein Switzerland	■									
68. Iceland									■	
69. Imperial Seaside Resorts	■									
70. Kassel	■									
71. Kiel	■									
72. Lake Constance	■									
73. Lake Starnberg	■									
74. Leipzig	■					■				
75. Leipzig New Lake District	■									
76. Liechtenstein							■			
77. Lisbon								■		
78. Lower Austria	■									
79. Lower Saxony	■									
80. Lübeck.Travemünde	■									
81. Lüneburg Heath	■									
82. Lusatian Lake District	■									
83. Luxembourg	■	■	■	■		■	■	■	■	
84. Lyon	■									
85. Magdeburg	■									
86. Mainz	■									
87. Marseille								■		
88. Mecklenburg Lake District	■									
89. Mecklenburg-Western Pomerania	■									
90. Monaco				■	■	■	■	■		

	DE	AT	CH	NL	CN	FR	IT	ES	UK	US
91. Moselle	■									
92. Munich	■				■		■			■
93. Münsterland	■									
94. **Navarre**					■	■				
95. Norderney	■									
96. North Rhine-Westphalia	■				■					
97. North Sea	■									
98. North Sea Island Amrum	■									
99. North Sea Land Dithmarschen	■									
100. Norway									■	
101. Nuremberg	■									
102. Nuremberg Land	■									
103. Oberhausen (Germany)	■				■					
104. Oder-Spree Lake District	■									
105. Ore Mountains	■									
106. Palatinate	■									
107. Porto								■		
108. Potsdam	■									
109. Rhine Hesse	■									
110. Rhineland-Palatinate	■	■	■	■			■			
111. Rhön	■									
112. Rostock-Warnemünde	■									
113. Rothenburg ob der Tauber	■									
114. Rügen Island	■									
115. Ruhr Valley	■									
116. Ruppin Lake District	■									
117. Saale-Unstrut	■									
118. Saarbrücken	■									
119. Saarland	■						■			
120. Salzburger Land	■									

Note 1: The source markets are marked in green, if the respective destination was surveyed there in the course of the study Destination Brand 22.
Note 2: Last survey taken into consideration in October / November 2022

Source: inspektour (international) GmbH, 2022

DESTINATION BRAND 22

2.3 Overview of the considered tourist destinations

	DE	AT	CH	NL	CN	FR	IT	ES	UK	US
121. Sauerland	■									
122. Saxonian Switzerland-Elbe Sandstone Mountains	■									
123. Saxony	■	■	■	■						
124. Saxony-Anhalt	■	■								
125. Schleswig-Holstein	■									
126. Schwerin	■									
127. Slovakia	■									
128. South Tirol	■									
129. Southern Harz-Kyffhäuser	■									
130. Spessart	■									
131. Spreewald	■									
132. St. Peter-Ording	■									
133. Stockholm	■									■
134. Stuttgart	■	■	■						■	
135. Styria	■									
136. Swabian Alb	■									
137. Sweden									■	
138. Switzerland		■			■	■				■
139. Sylt	■									
140. Taunus	■									
141. Teutoburg Forest	■									
142. the Prignitz	■									
143. Thuringia	■	■								
144. Thuringian Forest	■									
145. Tirol	■									
146. Trier	■									
147. Uckermark	■									
148. Upper Austria	■									
149. Upper Bavaria	■									
150. Upper Black Forest	■									

	DE	AT	CH	NL	CN	FR	IT	ES	UK	US
151. Upper Lusatia	■									
152. Upper Palatinate Forest	■									
153. Usedom Island	■									
154. Vienna	■				■		■			■
155. Vogelsberg	■									
156. Vogtland	■									
157. Vorarlberg	■									
158. Wadden Sea World Heritage	■			■						
159. Weimar	■									
160. Weserbergland	■									
161. Westerwald	■									
162. Wiesbaden	■									
163. Wiesbaden Rheingau	■									
164. Winterberg	■									
165. Zugspitze region	■									
166. Zurich	■		■		■		■			■

Note 1: The source markets are marked in green, if the respective destination was surveyed there in the course of the study Destination Brand 22.
Note 2: Last survey taken into consideration in October / November 2022
Note 3: The queried designation for the tourist destination Upper Black Forest in total: "Upper Black Forest, the region around Feldberg, Titisee, Schluchsee and Hinterzarten"
Source: inspektour (international) GmbH, 2022

Outline

1 GENERAL OVERVIEW OF THE STUDY SERIES DESTINATION BRAND

2 DESIGN OF THE PROFILE STUDY DESTINATION BRAND 22

3 OVERVIEW OF KEY RESULTS: THREE-DIMENSIONAL COMPETITOR ANALYSIS

3.1 Demand: General relevance of profile characteristics
3.2 Supply: Supported evaluation of profile characteristics
3.3 Competition: Comparison with competitors
3.4 Summary: Quadrant analysis

4 DEMAND: GENERAL RELEVANCE PER PROFILE CHARACTERISTIC IN DETAIL

5 SUPPLY: SUPPORTED EVALUATION OF PROFILE CHARACTERISTICS IN DETAIL

6 COMPETITION: COMPARISON WITH COMPETITORS PER PROFILE CHARACTERISTIC

7 CONTACT AND PROJECT PARTNERS

8 APPENDIX

IMPRINT

3.1 Demand: General relevance – *all considered characteristics*

Ranking of the considered characteristics with regard to the general relevance for destination selection (mean = 53%)

Source market: France

Base: All respondents | Number of respondents: 1,000
Top-two-box on a scale from "5 = very relevant" to "1 = not at all relevant"

#	Characteristic	% of resp.	projection*	#	Characteristic	% of resp.	projection*
1	safe	73%	34.1 m	26	surprising	55%	25.5 m
2	great place to live	73%	33.9 m	27	**inspiring**	**53%**	**24.8 m**
3	**hospitable**	**70%**	**32.7 m**	28	active	53%	24.8 m
4	diverse landscape	69%	32.1 m	29	refreshing	52%	24.1 m
5	accessible	68%	31.7 m	30	vitalising	52%	24.0 m
6	healthy	68%	31.5 m	31	**family-friendly**	**49%**	**22.7 m**
7	**authentic / genuine**	**67%**	**31.4 m**	32	opportunity to experience city flair and do activities in the surrounding area	49%	22.7 m
8	pleasant	67%	31.3 m	33	**sustainable**	**47%**	**21.8 m**
9	**natural**	**67%**	**31.0 m**	34	unique	45%	21.1 m
10	peaceful / calm	66%	30.7 m	35	amazing	44%	20.5 m
11	restorative / relaxing	66%	30.7 m	36	lively / hip	43%	20.3 m
12	charming / endearing	66%	30.7 m	37	Christmasy	43%	20.0 m
13	historically interesting	65%	30.2 m	38	intensive / exhilarating	43%	20.0 m
14	culturally interesting	65%	30.1 m	39	service-oriented	43%	19.9 m
15	decelerating / liberating	61%	28.5 m	40	contemporary	43%	19.9 m
16	casual / chill	61%	28.4 m	41	international	39%	18.3 m
17	not crowded / insider tip	61%	28.3 m	42	rich in contrast	38%	17.9 m
18	eventful	61%	28.3 m	43	cosmopolitan	38%	17.7 m
19	**offering a lot of variety**	**61%**	**28.2 m**	44	high-quality / good for holidaying	37%	17.4 m
20	honest / credible	59%	27.7 m	45	bicycle friendly	33%	15.4 m
21	**attractive**	**59%**	**27.6 m**	46	sporty	31%	14.6 m
22	traditional	57%	26.7 m	47	**opportunity to experience wine culture**	**31%**	**14.5 m**
23	**rural / scenic**	**55%**	**25.7 m**	48	LGBTQI+ friendly	31%	14.5 m
24	interesting regional architecture / design	55%	25.6 m	49	opportunity to experience digitally	29%	13.4 m
25	informative / educational	55%	25.6 m				

Source: inspektour (international) GmbH, 2022

* Projection of the absolute volume of the general relevance (number of people).
► **Note:** Last survey taken into consideration in October / November 2022

inspek**tour**
TOURISM AND MARKET RESEARCH

	Ranking of the considered characteristics with regard to the general relevance for destination selection (mean = 61%)						
	Source market: France						
	Base: All respondents with distinct intention to travel abroad | Number of respondents: 392						
	Top-two-box on a scale from "5 = very relevant" to "1 = not at all relevant"						
		% of resp.	projection*			% of resp.	projection*
1	safe	81%	14.8 m	26	traditional	61%	11.2 m
2	**hospitable**	**80%**	**14.5 m**	27	interesting regional architecture / design	61%	11.1 m
3	great place to live	79%	14.4 m	**28**	**inspiring**	**61%**	**11.1 m**
4	**authentic / genuine**	**76%**	**13.9 m**	29	opportunity to experience city flair and do activities in the surrounding area	60%	11.0 m
5	accessible	75%	13.6 m	**30**	**rural / scenic**	**58%**	**10.6 m**
6	charming / endearing	74%	13.6 m	31	refreshing	58%	10.5 m
7	diverse landscape	74%	13.6 m	**32**	**family-friendly**	**56%**	**10.3 m**
8	historically interesting	74%	13.4 m	33	unique	54%	9.8 m
9	culturally interesting	74%	13.4 m	34	amazing	53%	9.7 m
10	pleasant	73%	13.4 m	35	intensive / exhilarating	53%	9.6 m
11	peaceful / calm	72%	13.1 m	36	lively / hip	52%	9.5 m
12	healthy	71%	13.0 m	**37**	**sustainable**	**52%**	**9.5 m**
13	**natural**	**70%**	**12.8 m**	38	international	51%	9.3 m
14	eventful	70%	12.7 m	39	contemporary	51%	9.3 m
15	decelerating / liberating	69%	12.6 m	40	service-oriented	50%	9.2 m
16	**attractive**	**69%**	**12.6 m**	41	rich in contrast	46%	8.5 m
17	casual / chill	69%	12.5 m	42	Christmasy	46%	8.4 m
18	**offering a lot of variety**	**68%**	**12.4 m**	43	high-quality / good for holidaying	46%	8.4 m
19	restorative / relaxing	68%	12.4 m	44	cosmopolitan	46%	8.4 m
20	informative / educational	65%	11.9 m	45	sporty	39%	7.2 m
21	surprising	64%	11.6 m	**46**	**opportunity to experience wine culture**	**39%**	**7.2 m**
22	honest / credible	64%	11.6 m	47	bicycle friendly	38%	6.9 m
23	not crowded / insider tip	64%	11.6 m	48	LGBTQI+ friendly	35%	6.5 m
24	vitalising	63%	11.4 m	49	opportunity to experience digitally	35%	6.3 m
25	active	62%	11.4 m				

Source: inspektour (international) GmbH, 2022

* Projection of the absolute volume of the general relevance (number of people).
► **Note:** Last survey taken into consideration in October / November 2022

3.1 Demand: General relevance – *General characteristics*

General relevance for destination selection of the general characteristics

> *Just as people have certain character traits, tourist destinations can also be described using certain characteristics. How relevant are the following characteristics when you <u>choose a tourist destination</u> for a holiday trip with at least one overnight stay <u>in general</u> (i.e., regardless of a specific tourist destination)?*

> *Top-two-box on a scale from "5 = very relevant" to "1 = not at all relevant" (in % of respondents)*

■ *General characteristics*

Source market: France
Base: All respondents
Number of respondents: 1,000

■ Value "5"   ■ Value "4"

projection*

Characteristic	Top-two-box	projection*
hospitable	70%	32.7 m
authentic / genuine	67%	31.4 m
offering a lot of variety	61%	28.2 m
attractive	59%	27.6 m
sustainable	47%	21.8 m

0%   10%   20%   30%   40%   50%   60%   70%   80%   90%

* Projection of the absolute volume of the general relevance (number of people).

Source: inspektour (international) GmbH, 2022

3.1 Demand: General relevance – *General characteristics*

General relevance for destination selection of the general characteristics

> *Just as people have certain character traits, tourist destinations can also be described using certain characteristics. How relevant are the following characteristics when you <u>choose a tourist destination</u> for a holiday trip with at least one overnight stay <u>in general</u> (i.e., regardless of a specific tourist destination)?*

> *Top-two-box on a scale from "5 = very relevant" to "1 = not at all relevant" (in % of respondents)*

■ *General characteristics*

Source market: France
Base: All respondents with distinct intention to travel abroad
Number of respondents: 392

■ Value "5"   ■ Value "4"   projection*

Characteristic	%	projection*
hospitable	80%	14.5 m
authentic / genuine	76%	13.9 m
attractive	69%	12.6 m
offering a lot of variety	68%	12.4 m
sustainable	52%	9.5 m

0% 10% 20% 30% 40% 50% 60% 70% 80% 90%

* Projection of the absolute volume of the general relevance (number of people).

Source: inspektour (international) GmbH, 2022

3.1 Demand: General relevance – *Specific characteristics*

General relevance for destination selection of the specific characteristics

> *Just as people have certain character traits, tourist destinations can also be described using certain characteristics. How relevant are the following characteristics when you* <u>choose a tourist destination</u> *for a holiday trip with at least one overnight stay* <u>in general</u> *(i.e., regardless of a specific tourist destination)?*

> *Top-two-box on a scale from "5 = very relevant" to "1 = not at all relevant" (in % of respondents)*

■ *Specific characteristics*

Source market: France
Base: All respondents
Number of respondents: 1,000

■ Value "5"   ■ Value "4"

	projection*
natural — 67%	**31.0 m**
rural / scenic — 55%	**25.7 m**
inspiring — 53%	**24.8 m**
family-friendly — 49%	**22.7 m**
opportunity to experience wine culture — 31%	**14.5 m**

0% 10% 20% 30% 40% 50% 60% 70% 80% 90%

* Projection of the absolute volume of the general relevance (number of people).

Source: inspektour (international) GmbH, 2022

DESTINATION BRAND 22

3.1 Demand: General relevance – *Specific characteristics*

General relevance for destination selection of the specific characteristics

> *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)?*

> *Top-two-box on a scale from "5 = very relevant" to "1 = not at all relevant" (in % of respondents)*

■ *Specific characteristics*

Source market: France
Base: All respondents with distinct intention to travel abroad
Number of respondents: 392

■ Value "5"   ■ Value "4"

	projection*
natural — 70%	**12.8 m**
inspiring — 61%	**11.1 m**
rural / scenic — 58%	**10.6 m**
family-friendly — 56%	**10.3 m**
opportunity to experience wine culture — 39%	**7.2 m**

0% 10% 20% 30% 40% 50% 60% 70% 80% 90%

* Projection of the absolute volume of the general relevance (number of people).

Source: inspektour (international) GmbH, 2022

3.1 Demand: General relevance – *Polarity profile*

**General relevance –
Polarity profile**

> *Mean values (scale from "5 = very relevant"
to "1 = not at all relevant")*

Source market: France
Base: All respondents
Number of respondents: min. 392

◆——◆ **Base "All respondents"**

■——■ **Base "All respondents with
distinct intention to travel
abroad"**

Profile characteristics	not at all relevant			very relevant			
	1	2	3	4	5		
attractive						3.7	3.9
authentic / genuine						3.8	4.0
hospitable						3.9	4.1
offering a lot of variety						3.7	3.8
sustainable						3.4	3.5
family-friendly						3.4	3.5
inspiring						3.5	3.7
natural						3.8	3.9
opportunity to experience wine culture						2.8	3.0
rural / scenic						3.6	3.6

Source: inspektour (international) GmbH, 2022

3.1 Demand: General relevance – *Comparison by source market*

General relevance for destination selection of the general characteristics

> *Just as people have certain character traits, tourist destinations can also be described using certain characteristics. How relevant are the following characteristics when you <u>choose a tourist destination</u> for a holiday trip with at least one overnight stay <u>in general</u> (i.e., regardless of a specific tourist destination)?*
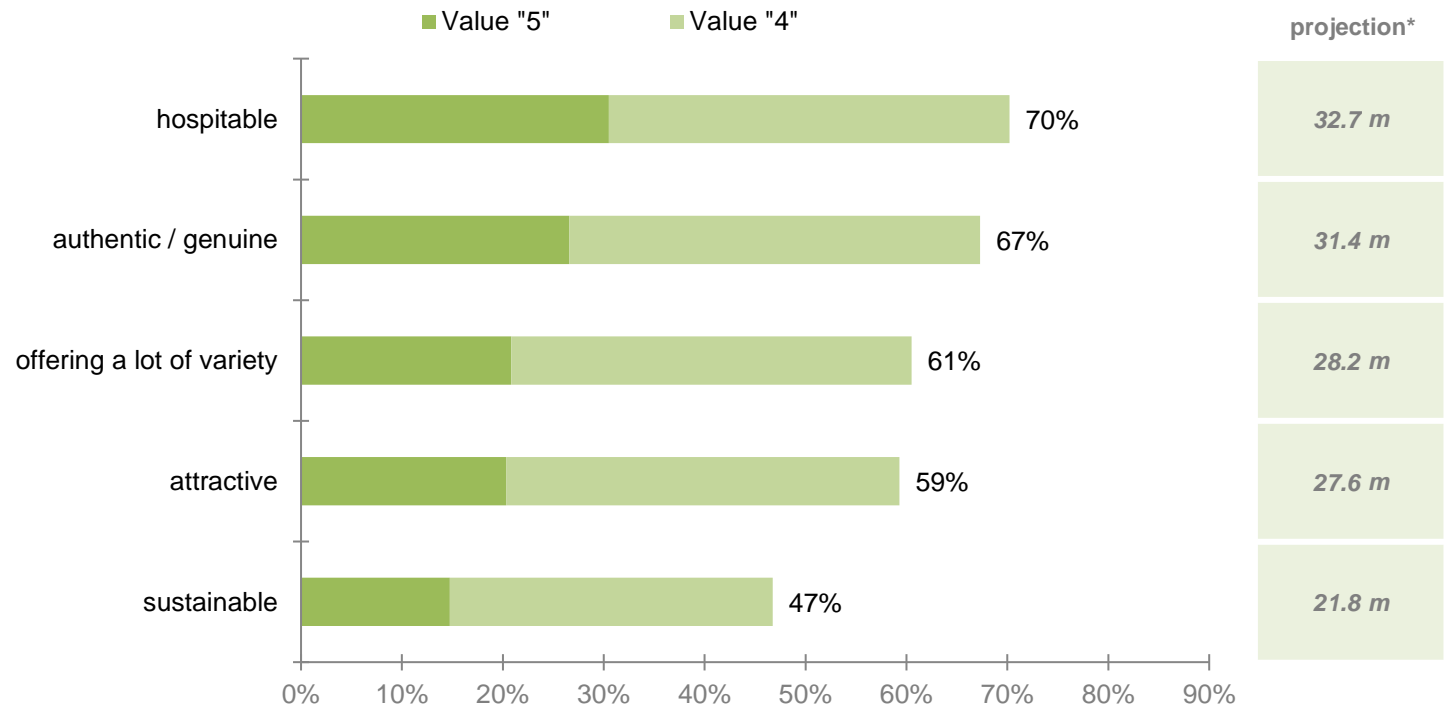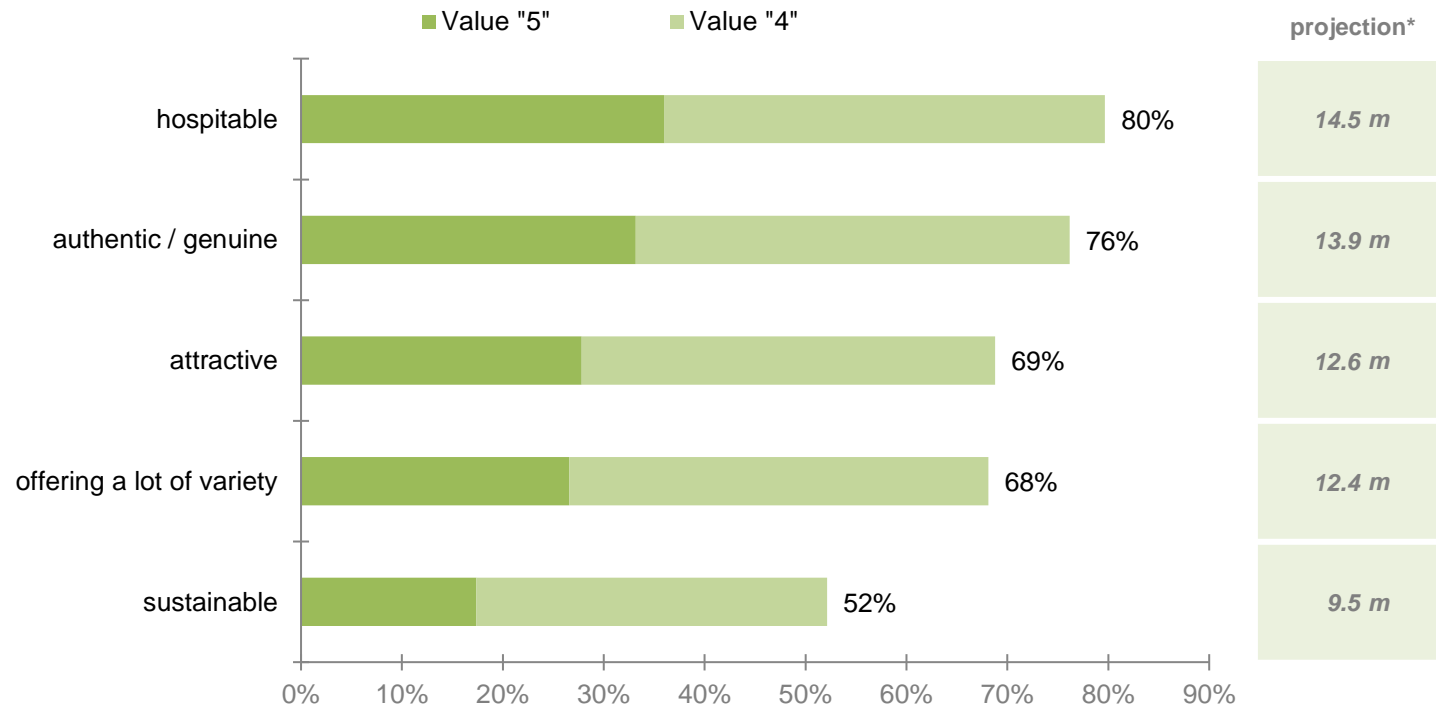
> *Top-two-box on a scale from "5 = very relevant" to "1 = not at all relevant" (in % of respondents)*

■ *General characteristics*

Source market: Comparison
Base: All respondents
Number of respondents: 1,000

Legend: ■ SM NL   ■ SM FR

Characteristic	SM NL	SM FR
attractive	72%	59%
authentic / genuine	64%	67%
hospitable	73%	70%
offering a lot of variety	63%	61%
sustainable	39%	47%

3.1 Demand: General relevance – *Comparison by source market*

General relevance for destination selection of the specific characteristics

> 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)?
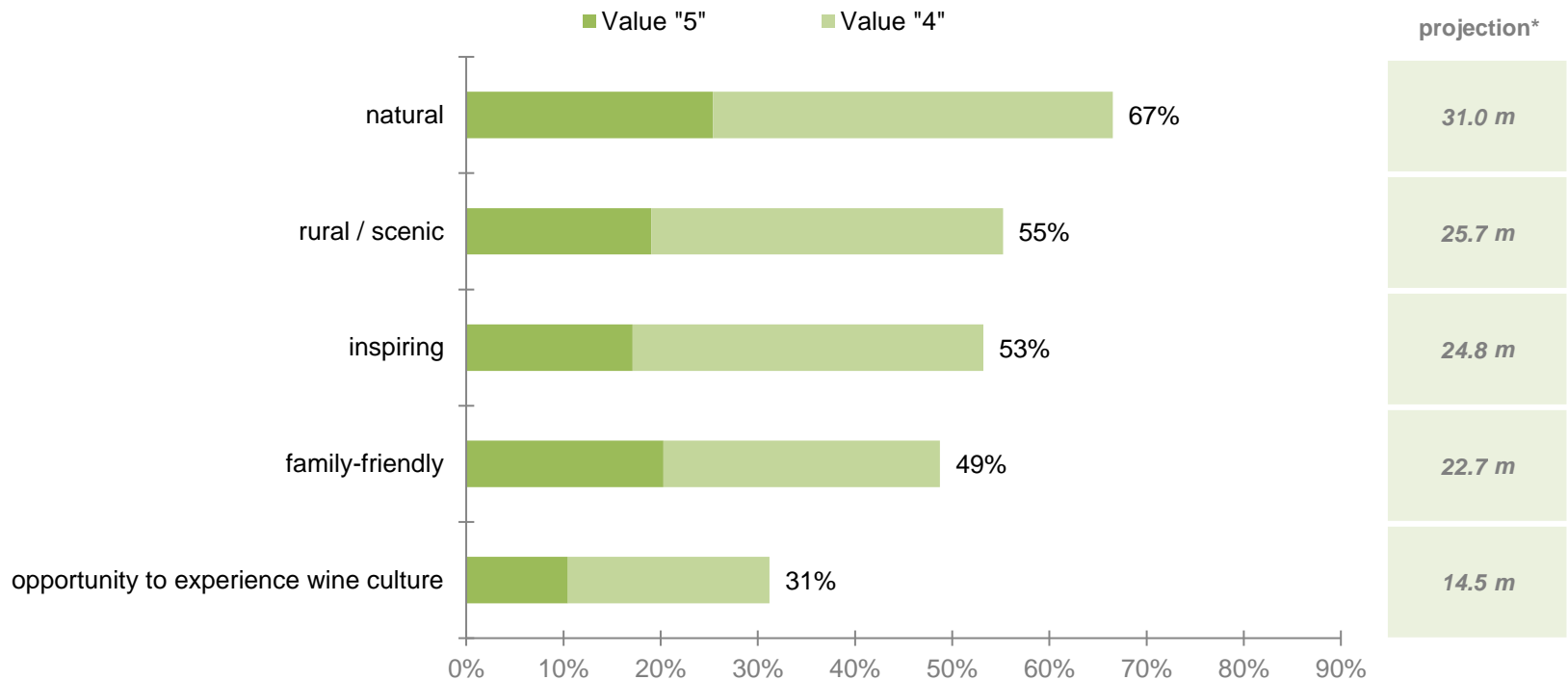
> Top-two-box on a scale from "5 = very relevant" to "1 = not at all relevant" (in % of respondents)

■ *Specific characteristics*

Source market: Comparison
Base: All respondents
Number of respondents: 1,000

Legend: ■ SM NL   ■ SM FR

Characteristic	SM NL	SM FR
family-friendly	44%	49%
inspiring	57%	53%
natural	63%	67%
opportunity to experience wine culture	32%	31%
rural / scenic	60%	55%

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1 GENERAL OVERVIEW OF THE STUDY SERIES DESTINATION BRAND

2 DESIGN OF THE PROFILE STUDY DESTINATION BRAND 22

3 OVERVIEW OF KEY RESULTS: THREE-DIMENSIONAL COMPETITOR ANALYSIS

    3.1 Demand: General relevance of profile characteristics

    3.2 Supply: Supported evaluation of profile characteristics

    3.3 Competition: Comparison with competitors

    3.4 Summary: Quadrant analysis

4 DEMAND: GENERAL RELEVANCE PER PROFILE CHARACTERISTIC IN DETAIL

5 SUPPLY: SUPPORTED EVALUATION OF PROFILE CHARACTERISTICS IN DETAIL

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IMPRINT

3.2 Supply: Supported evaluation of characteristics – *General characteristics*

Supported evaluation of the general characteristics

> Just as people have certain character traits, tourist destinations can also be described using certain characteristics. Please indicate to what extent the following characteristics are applicable to the following <u>international</u> tourist destination?

> Top-two-box on a scale from "5 = completely applicable" to "1 = not at all applicable" (in % of respondents)

■ *Région de Navarre*

Source market: France
Base: All respondents
Number of respondents: 1,000

■ Value "5" ■ Value "4"

projection*

authentic / genuine	21%
hospitable	18%
attractive	18%
offering a lot of variety	17%
sustainable	13%

9.8 m
8.4 m
8.2 m
8.0 m
6.0 m

0% 10% 20% 30% 40% 50% 60% 70% 80% 90%

* Projection of the absolute volume of the attributed applicability (number of people).

Source: inspektour (international) GmbH, 2022

3.2 Supply: Supported evaluation of characteristics – *Specific characteristics*

Supported evaluation of the specific characteristics

> Just as people have certain character traits, tourist destinations can also be described using certain characteristics. Please indicate to what extent the following characteristics are applicable to the following <u>international</u> tourist destination?

> Top-two-box on a scale from "5 = completely applicable" to "1 = not at all applicable" (in % of respondents)

■ *Région de Navarre*

Source market: France
Base: All respondents
Number of respondents: 1,000

projection*

■ Value "5" ■ Value "4"

Characteristic	Top-two-box	projection*
rural / scenic	21%	*9.7 m*
natural	20%	*9.3 m*
family-friendly	18%	*8.6 m*
inspiring	17%	*8.1 m*
opportunity to experience wine culture	14%	*6.4 m*

0% 10% 20% 30% 40% 50% 60% 70% 80% 90%

* Projection of the absolute volume of the attributed applicability (number of people).

Source: inspektour (international) GmbH, 2022

DESTINATION BRAND 22

3.2 Supply: Supported evaluation of characteristics – *General characteristics by subgroups*

Supported evaluation of the general characteristics

> *Just as people have certain character traits, tourist destinations can also be described using certain characteristics. Please indicate to what extent the following characteristics are applicable to the following <u>international</u> tourist destination?*

> *Top-two-box on a scale from "5 = completely applicable" to "1 = not at all applicable" (in % of respondents)*

■ *Région de Navarre*

Source market: France
Base: All respondents
Number of respondents: 1,000
Number base by subgroups: varying

■ All respondents ■ Distinct intention to travel abroad ■ Affine to the characteristic ■ Visitors in the past**

	Projection*			
	All respondents	**Distinct intention to travel abroad**	**Affine to the characteristic**	**Visitors in the past****
authentic / genuine — 21%, 29%, 25%, 85%	*9.8 m*	*5.4 m*	*8.0 m*	*2.8 m*
hospitable — 18%, 27%, 21%, 79%	*8.4 m*	*5.0 m*	*6.9 m*	*2.6 m*
attractive — 18%, 26%, 22%, 68%	*8.2 m*	*4.7 m*	*6.1 m*	*2.2 m*
offering a lot of variety — 17%, 26%, 23%, 72%	*8.0 m*	*4.8 m*	*6.5 m*	*2.4 m*
sustainable — 13%, 20%, 20%, 52%	*6.0 m*	*3.6 m*	*4.5 m*	*1.7 m*

0% 10% 20% 30% 40% 50% 60% 70% 80% 90%

* Projection of the absolute volume of the attributed applicability (number of people).
** Sample size < 100: Higher statistical uncertainty due to relatively small sample size.

Source: inspektour (international) GmbH, 2022

3.2 Supply: Supported evaluation of characteristics – *Specific characteristics by subgroups*

Supported evaluation of the specific characteristics

> *Just as people have certain character traits, tourist destinations can also be described using certain characteristics. Please indicate to what extent the following characteristics are applicable to the following underlineinternational tourist destination?*
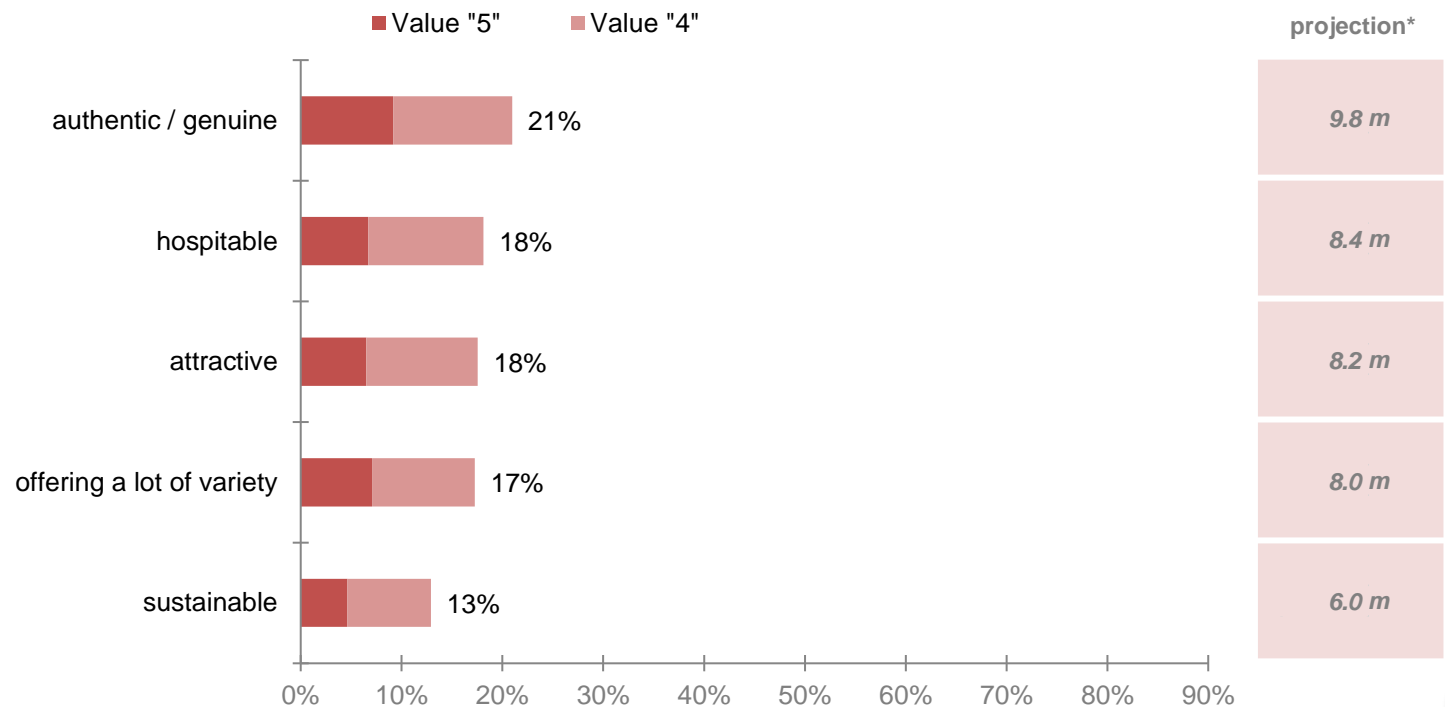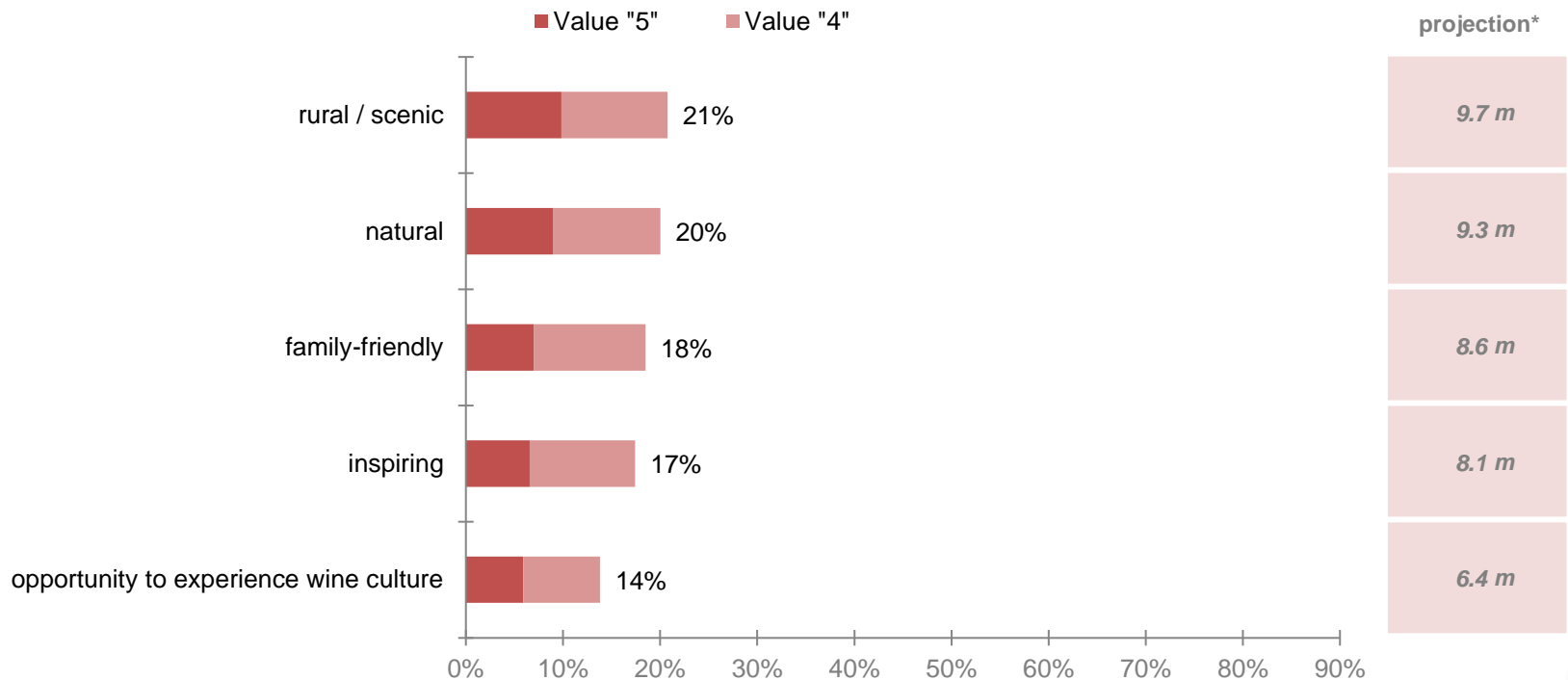
> *Top-two-box on a scale from "5 = completely applicable" to "1 = not at all applicable" (in % of respondents)*

■ *Région de Navarre*

Source market: France
Base: All respondents
Number of respondents: 1,000
Number base by subgroups: varying

■ All respondents ■ Distinct intention to travel abroad ■ Affine to the characteristic ■ Visitors in the past**

Projection*

Characteristic	All respondents	Distinct intention to travel abroad	Affine to the characteristic	Visitors in the past**
rural / scenic	9.7 m	5.6 m	6.9 m	2.7 m
natural	9.3 m	5.4 m	7.7 m	2.5 m
family-friendly	8.6 m	5.3 m	4.7 m	2.5 m
inspiring	8.1 m	4.6 m	5.6 m	2.0 m
opportunity to experience wine culture	6.4 m	4.0 m	3.0 m	1.9 m

Bar chart values:

- **rural / scenic**: 21%, 31%, 27%, 81%
- **natural**: 20%, 30%, 25%, 76%
- **family-friendly**: 18%, 29%, 21%, 76%
- **inspiring**: 17%, 25%, 23%, 62%
- **opportunity to experience wine culture**: 14%, 22%, 21%, 58%

(Axis: 0% 10% 20% 30% 40% 50% 60% 70% 80% 90%)

* Projection of the absolute volume of the attributed applicability (number of people).
** Sample size < 100: Higher statistical uncertainty due to relatively small sample size.

Source: inspektour (international) GmbH, 2022

DESTINATION BRAND 22

3.2 Supply: Supported evaluation of characteristics – *Polarity profile by subgroups*

Supported evaluation of characteristics – Polarity profile

> *Mean values
(scale from "5 = completely applicable"
to "1 = not at all applicable")*

■ *Région de Navarre*

Source market: France
Base: All respondents
Number of respondents: 1,000
Number of respondents by subgroups: varying

◆——◆ All respondents

●——● Distinct intention to travel abroad

◀——▶ Affine to the characteristic

■——■ Visitors in the past*

Profile characteristics	not at all applicable		completely applicable						
	1	2	3	4	5				
attractive						3.8	3.9	3.9	3.9
authentic / genuine						4.1	4.2	4.2	4.2
hospitable						3.9	4.0	4.0	4.0
offering a lot of variety						3.8	4.0	4.1	3.9
sustainable						3.7	3.8	4.0	3.6
family-friendly						4.0	4.2	4.1	4.1
inspiring						3.8	4.0	3.9	3.8
natural						4.0	4.2	4.1	4.0
opportunity to experience wine culture						3.7	3.9	4.0	3.9
rural / scenic						4.1	4.2	4.3	4.2

* Sample size < 100: Higher statistical uncertainty due to relatively small sample size.

DESTINATION BRAND 22

3.2 Supply: Supported evaluation of characteristics – *Comparison by source market*

Supported evaluation of the general characteristics

> *Just as people have certain character traits, tourist destinations can also be described using certain characteristics. Please indicate to what extent the following characteristics are applicable to the following* <u>*international*</u> *tourist destination?*

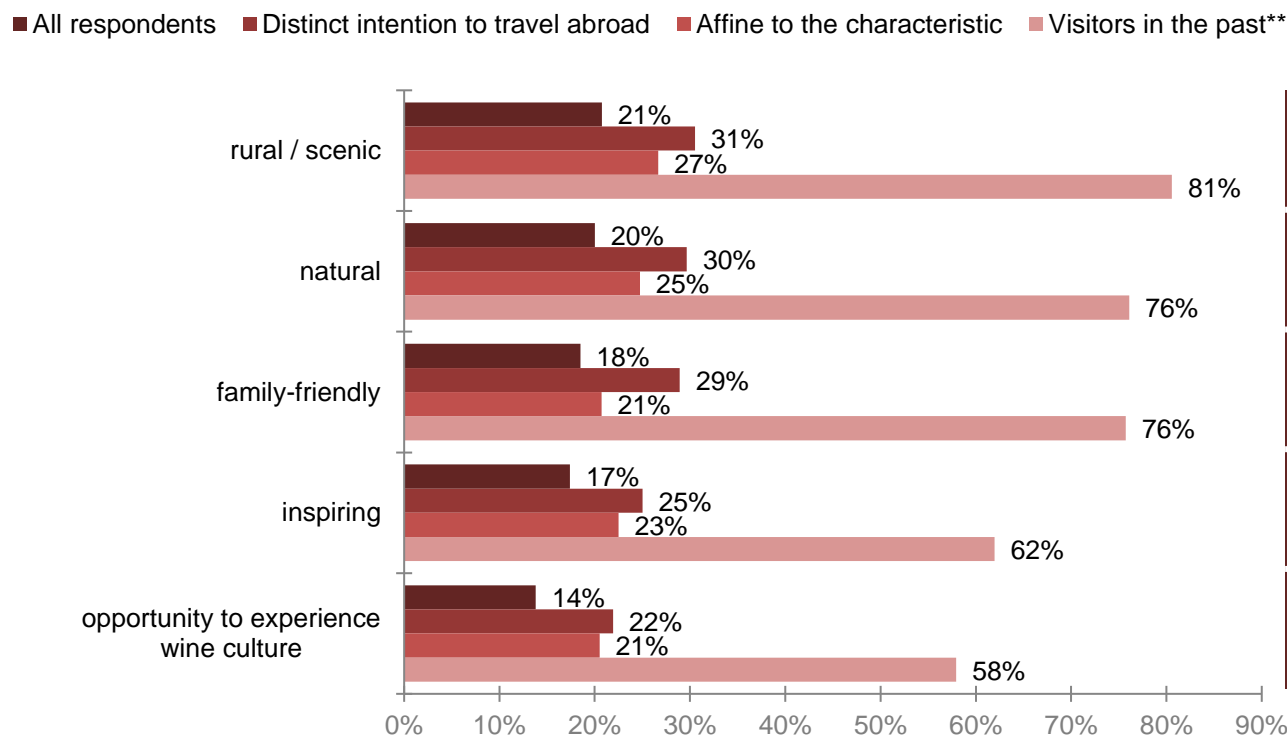> *Top-two-box on a scale from "5 = completely applicable" to "1 = not at all applicable" (in % of respondents)*

■ *Région de Navarre*

Source market: Comparison
Base: All respondents
Number of respondents: 1,000

■ SM NL: De Noord-Spaanse regio Navarre   ■ SM FR: Région de Navarre

Characteristic	SM NL	SM FR
attractive	12%	18%
authentic / genuine	14%	21%
hospitable	12%	18%
offering a lot of variety	11%	17%
sustainable	6%	13%

Source: inspektour (international) GmbH, 2022

DESTINATION BRAND 22

3.2 Supply: Supported evaluation of characteristics – *Comparison by source market*

Supported evaluation of the specific characteristics

> *Just as people have certain character traits, tourist destinations can also be described using certain characteristics. Please indicate to what extent the following characteristics are applicable to the following <u>international</u> tourist destination?*

> *Top-two-box on a scale from "5 = completely applicable" to "1 = not at all applicable" (in % of respondents)*

■ *Région de Navarre*

Source market: Comparison
Base: All respondents
Number of respondents: 1,000

■ SM NL: De Noord-Spaanse regio Navarre   ■ SM FR: Région de Navarre

Characteristic	SM NL	SM FR
family-friendly	9%	18%
inspiring	11%	17%
natural	12%	20%
opportunity to experience wine culture	11%	14%
rural / scenic	14%	21%

Source: inspektour (international) GmbH, 2022

Outline

1 GENERAL OVERVIEW OF THE STUDY SERIES DESTINATION BRAND

2 DESIGN OF THE PROFILE STUDY DESTINATION BRAND 22

3 OVERVIEW OF KEY RESULTS: THREE-DIMENSIONAL COMPETITOR ANALYSIS

3.1 Demand: General relevance of profile characteristics
3.2 Supply: Supported evaluation of profile characteristics
3.3 Competition: Comparison with competitors
3.4 Summary: Quadrant analysis

4 DEMAND: GENERAL RELEVANCE PER PROFILE CHARACTERISTIC IN DETAIL

5 SUPPLY: SUPPORTED EVALUATION OF PROFILE CHARACTERISTICS IN DETAIL

6 COMPETITION: COMPARISON WITH COMPETITORS PER PROFILE CHARACTERISTIC

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3.3 Competition: Comparison with competitors – *Category: All considered destinations*
Source market: France

DESTINATION BRAND 22	Source market: France				Category: All considered destinations					
Région de Navarre (N = 1.000)	**Number of destinations in category**	**Base: All respondents**				**Base: Distinct intention to travel abroad**			**Base: Affine to the characteristic**		
		own value		**mean**	**rank**	**own value**	**mean**	**rank**	**own value**	**mean**	**rank**
		in %	**projection***			**in %**			**in %**		
attractive	10	**18%**	8.2 m	24%	**6.**	**26%**	31%	**6.**	**22%**	29%	**6.**
authentic / genuine		**21%**	9.8 m	25%	**6.**	**29%**	33%	**6.**	**25%**	30%	**6.**
hospitable		**18%**	8.4 m	24%	**6.**	**27%**	31%	**6.**	**21%**	27%	**6.**
offering a lot of variety		**17%**	8.0 m	24%	**6.**	**26%**	31%	**6.**	**23%**	29%	**6.**
sustainable		**13%**	6.0 m	19%	**6.**	**20%**	26%	**6.**	**20%**	26%	**6.**
family-friendly	6	**18%**	8.6 m	16%	**2.**	**29%**	23%	**2.**	**21%**	20%	**2.**
inspiring	2	**17%**	8.1 m	n.a.	**2.**	**25%**	n.a.	**2.**	**23%**	n.a.	**2.**
natural	1	**20%**	9.3 m	No competitive comparison possible, characteristic only surveyed for 1 destination		**30%**	No competitive comparison possible, characteristic only surveyed for 1 destination		**25%**	No competitive comparison possible, characteristic only surveyed for 1 destination	
opportunity to experience wine culture	3	**14%**	6.4 m	9%	**1.**	**22%**	14%	**1.**	**21%**	15%	**1.**
rural / scenic	2	**21%**	9.7 m	n.a.	**2.**	**31%**	n.a.	**2.**	**27%**	n.a.	**2.**

► **Note:** Last survey taken into consideration in October / November 2022

* Projection of the absolute volume of the attributed applicability (number of people).

Source: inspektour (international) GmbH, 2022

Outline

1 GENERAL OVERVIEW OF THE STUDY SERIES DESTINATION BRAND

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3 OVERVIEW OF KEY RESULTS: THREE-DIMENSIONAL COMPETITOR ANALYSIS

    3.1 Demand: General relevance of profile characteristics

    3.2 Supply: Supported evaluation of profile characteristics

    3.3 Competition: Comparison with competitors

    3.4 Summary: Quadrant analysis

4 DEMAND: GENERAL RELEVANCE PER PROFILE CHARACTERISTIC IN DETAIL

5 SUPPLY: SUPPORTED EVALUATION OF PROFILE CHARACTERISTICS IN DETAIL

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inspektour
TOURISM AND MARKET RESEARCH

Quadrant analysis Région de Navarre

> *Category for relative ranking according to competitor analysis:*
All considered destinations (up to 10 tourist destinations per characteristic)

■ *Région de Navarre*
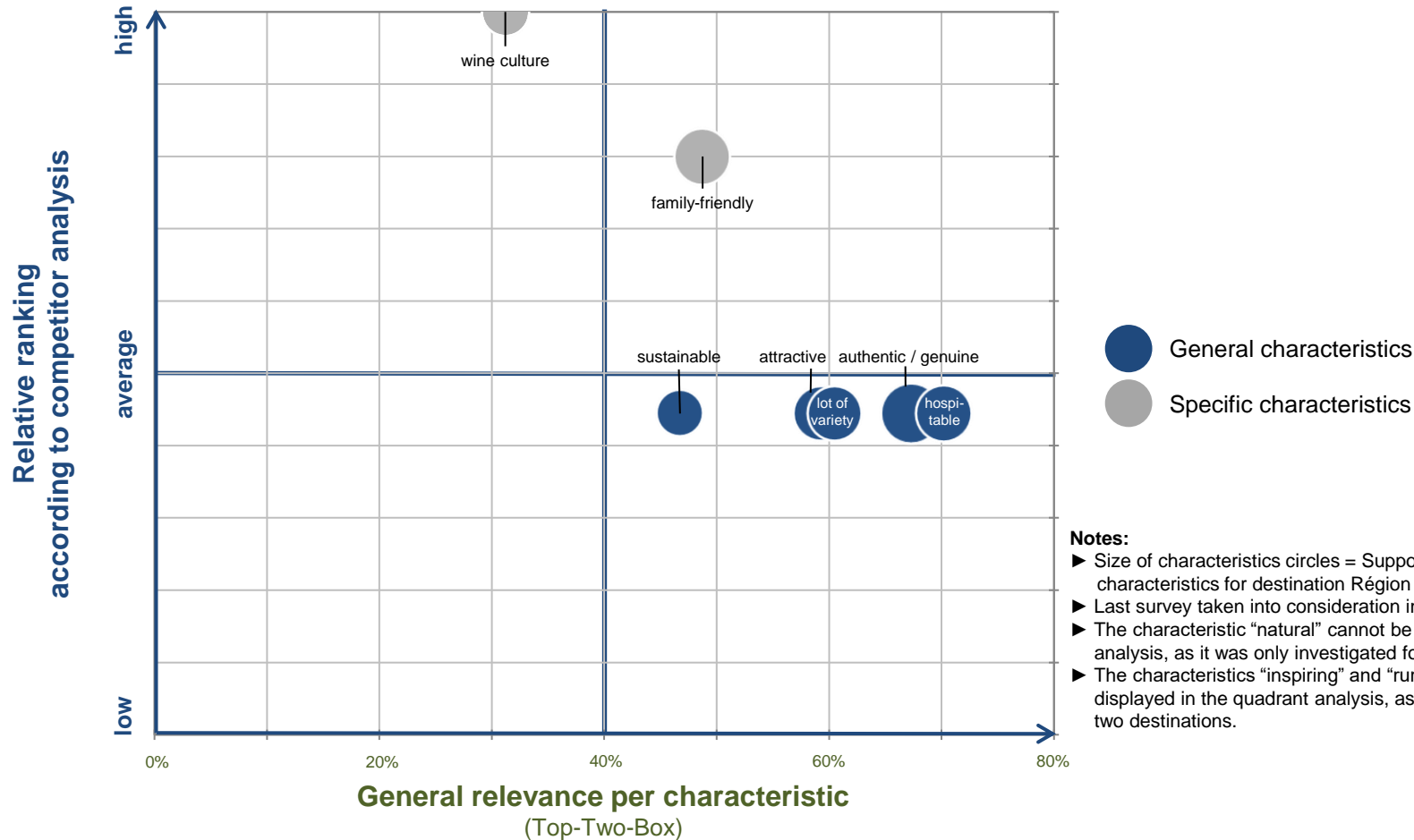
Source market: France
Base: All respondents
Number of respondents: 1,000

Relative ranking according to competitor analysis (y-axis: low, average, high)

General relevance per characteristic
(Top-Two-Box) (x-axis: 0%, 20%, 40%, 60%, 80%)

Plotted characteristics: wine culture, family-friendly, sustainable, attractive, authentic / genuine, lot of variety, hospitable

● General characteristics
● Specific characteristics

Notes:
► Size of characteristics circles = Supported evaluation of characteristics for destination Région de Navarre
► Last survey taken into consideration in October / November 2022
► The characteristic "natural" cannot be displayed in the quadrant analysis, as it was only investigated for one destination.
► The characteristics "inspiring" and "rural / scenic" cannot be displayed in the quadrant analysis, as they were only investigated for two destinations.

Source: inspektour (international) GmbH, 2022

DESTINATION BRAND 22

Outline

1 GENERAL OVERVIEW OF THE STUDY SERIES DESTINATION BRAND

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4 DEMAND: GENERAL RELEVANCE PER PROFILE CHARACTERISTIC IN DETAIL

5 SUPPLY: SUPPORTED EVALUATION OF PROFILE CHARACTERISTICS IN DETAIL

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![inspektour — TOURISM AND MARKET RESEARCH]

4. Demand: General relevance – *Profile characteristics in detail*

General relevance of the characteristic: "attractive"

> *Just as people have certain character traits, tourist destinations can also be described using certain characteristics. How relevant are the following characteristics when you <u>choose a tourist destination</u> for a holiday trip with at least one overnight stay <u>in general</u> (i.e., regardless of a specific tourist destination)?*

> *Values (in % of respondents)*

■ *attractive*

Source market: France
Base: All respondents
Number of respondents: 1,000

Pie chart values: 20%, 39%, 31%, 6%, 4%

top-two-box*
59%

- ■ 5 = "very relevant"
- ■ 4 =
- ■ 3 =

bottom-two-box*
9%

- ■ 2 =
- ■ 1 = "not at all relevant"

DESTINATION BRAND 22

Ø** = 3.7

* Deviations of 1% from the sum of the individual values are possible due to rounding.

** Scale from "5 = very relevant" to "1 = not at all relevant"

Source: inspektour (international) GmbH, 2022

4. Demand: General relevance – *Profile characteristics in detail*

General relevance of the characteristic: "authentic / genuine"

> *Just as people have certain character traits, tourist destinations can also be described using certain characteristics. How relevant are the following characteristics when you <u>choose a tourist destination</u> for a holiday trip with at least one overnight stay <u>in general</u> (i.e., regardless of a specific tourist destination)?*
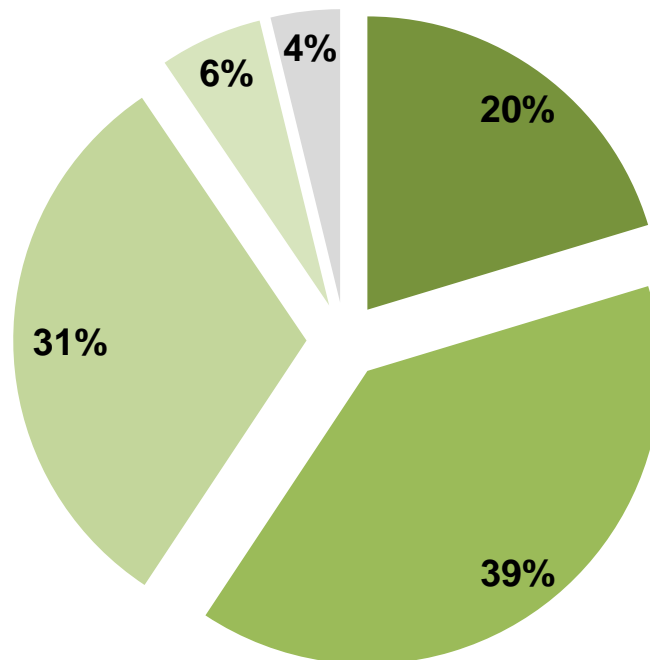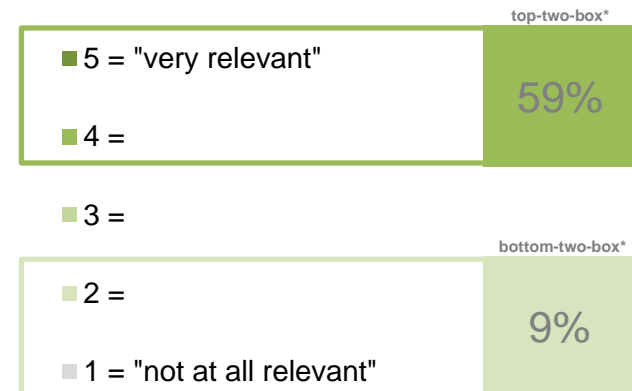
> *Values (in % of respondents)*

■ *authentic / genuine*

Source market: France
Base: All respondents
Number of respondents: 1,000

27%
25%
4%
3%
41%

top-two-box*

■ 5 = "very relevant"
■ 4 =

67%

■ 3 =

bottom-two-box*

■ 2 =
■ 1 = "not at all relevant"

8%

Ø** = 3.8

* Deviations of 1% from the sum of the individual values are possible due to rounding.

** Scale from "5 = very relevant" to "1 = not at all relevant"

Source: inspektour (international) GmbH, 2022

Destination Brand 22 | The profile characteristics of tourist destinations

authentic / genuine

51

4. Demand: General relevance – *Profile characteristics in detail*

General relevance of the characteristic: "hospitable"

> *Just as people have certain character traits, tourist destinations can also be described using certain characteristics. How relevant are the following characteristics when you <u>choose a tourist destination</u> for a holiday trip with at least one overnight stay <u>in general</u> (i.e., regardless of a specific tourist destination)?*
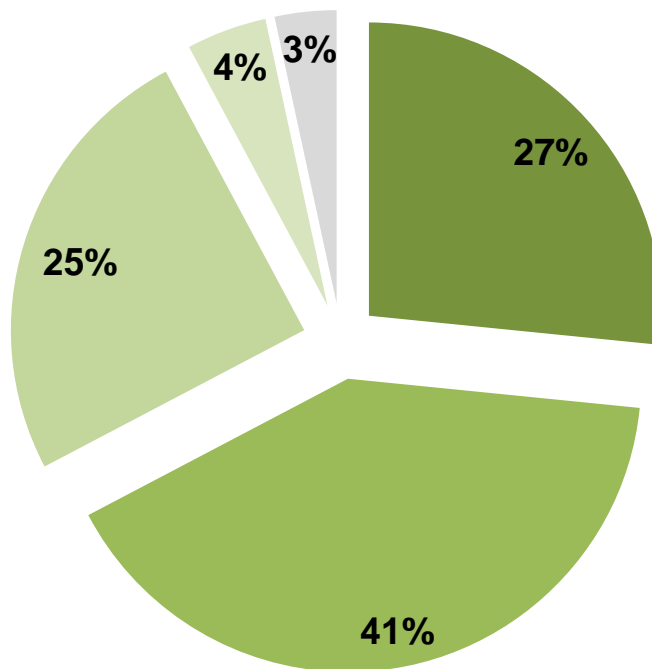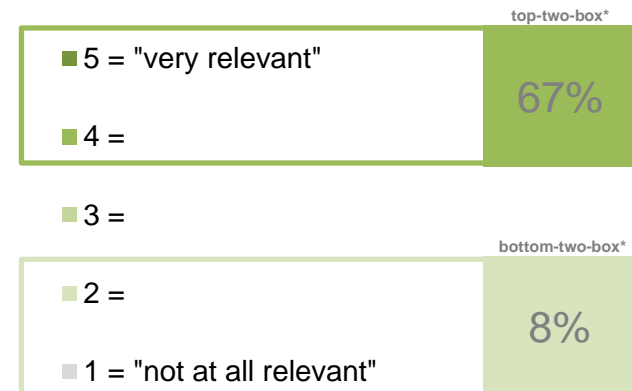
> *Values (in % of respondents)*

■ *hospitable*

Source market: France
Base: All respondents
Number of respondents: 1,000

Pie chart:
- 31%
- 40%
- 23%
- 4%
- 3%

Legend:
- ■ 5 = "very relevant"
- ■ 4 =
- ■ 3 =
- ■ 2 =
- ■ 1 = "not at all relevant"

top-two-box*
70%

bottom-two-box*
7%

DESTINATION BRAND 22

Ø** = 3.9

* Deviations of 1% from the sum of the individual values are possible due to rounding.

** Scale from "5 = very relevant" to "1 = not at all relevant"

Source: inspektour (international) GmbH, 2022

4. Demand: General relevance – *Profile characteristics in detail*

General relevance of the characteristic: "offering a lot of variety"

> *Just as people have certain character traits, tourist destinations can also be described using certain characteristics. How relevant are the following characteristics when you* <u>choose a tourist destination</u> *for a holiday trip with at least one overnight stay* <u>in general</u> *(i.e., regardless of a specific tourist destination)?*
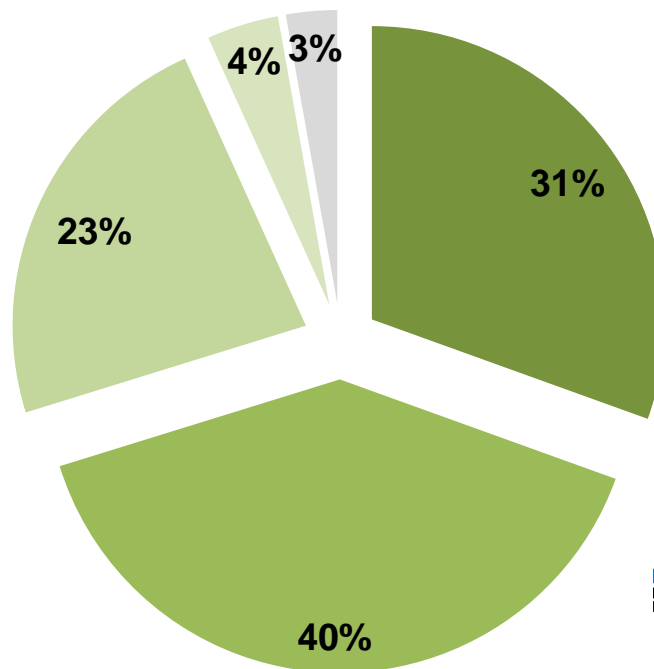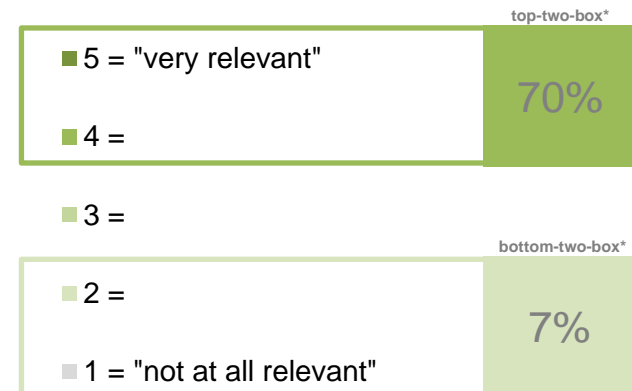
> *Values (in % of respondents)*

■ *offering a lot of variety*

Source market: France
Base: All respondents
Number of respondents: 1,000

- **21%**
- **40%**
- **31%**
- **5%**
- **3%**

top-two-box*

■ 5 = "very relevant"

■ 4 =

61%

■ 3 =

bottom-two-box*

■ 2 =

■ 1 = "not at all relevant"

8%

Ø** = 3.7

* Deviations of 1% from the sum of the individual values are possible due to rounding.

** Scale from "5 = very relevant" to "1 = not at all relevant"

4. Demand: General relevance – *Profile characteristics in detail*

General relevance of the characteristic: "sustainable"

> *Just as people have certain character traits, tourist destinations can also be described using certain characteristics. How relevant are the following characteristics when you <u>choose a tourist destination</u> for a holiday trip with at least one overnight stay <u>in general</u> (i.e., regardless of a specific tourist destination)?*
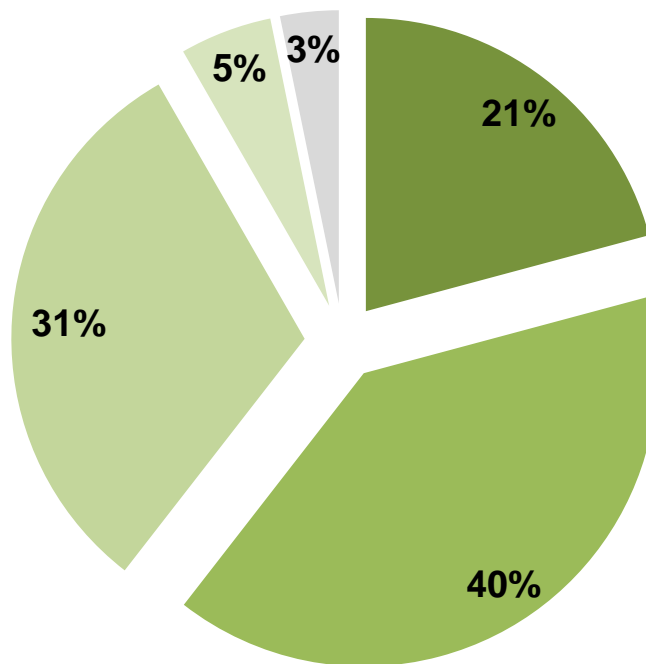
> *Values (in % of respondents)*

■ *sustainable*

Source market: France
Base: All respondents
Number of respondents: 1,000

- 15%
- 32%
- 37%
- 9%
- 7%

■ 5 = "very relevant"

■ 4 =

top-two-box*

47%

■ 3 =

■ 2 =

■ 1 = "not at all relevant"

bottom-two-box*

16%

Ø** = 3.4

* Deviations of 1% from the sum of the individual values are possible due to rounding.

** Scale from "5 = very relevant" to "1 = not at all relevant"

4. Demand: General relevance – *Profile characteristics in detail*

General relevance of the characteristic: "family-friendly"

> *Just as people have certain character traits, tourist destinations can also be described using certain characteristics. How relevant are the following characteristics when you <u>choose a tourist destination</u> for a holiday trip with at least one overnight stay <u>in general</u> (i.e., regardless of a specific tourist destination)?*
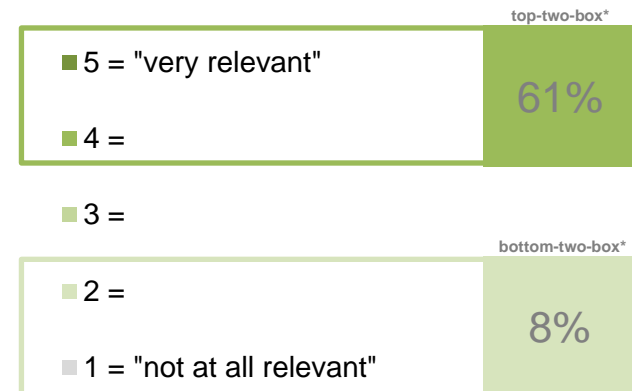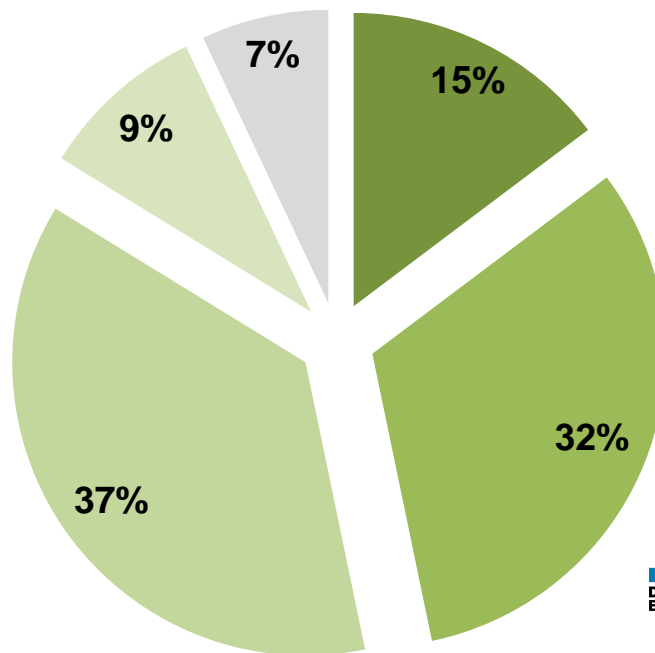
> *Values (in % of respondents)*

■ *family-friendly*

Source market: France
Base: All respondents
Number of respondents: 1,000

20%

11%

11%

29%

28%

top-two-box*

■ 5 = "very relevant"

■ 4 =

49%

■ 3 =

bottom-two-box*

■ 2 =

■ 1 = "not at all relevant"

22%

Ø** = 3.4

DESTINATION BRAND 22

* Deviations of 1% from the sum of the individual values are possible due to rounding.

** Scale from "5 = very relevant" to "1 = not at all relevant"

4. Demand: General relevance – *Profile characteristics in detail*

General relevance of the characteristic: "inspiring"

> *Just as people have certain character traits, tourist destinations can also be described using certain characteristics. How relevant are the following characteristics when you* <u>*choose a tourist destination*</u> *for a holiday trip with at least one overnight stay* <u>*in general*</u> *(i.e., regardless of a specific tourist destination)?*
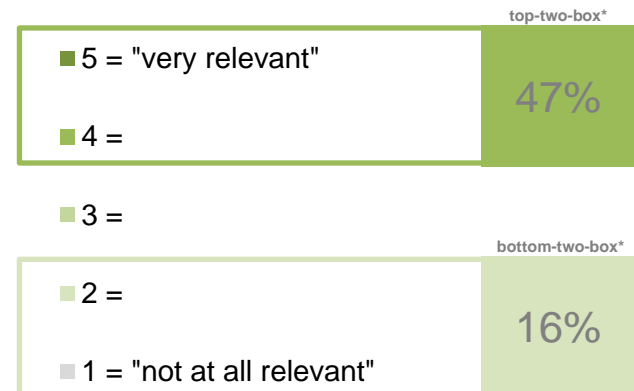
> *Values (in % of respondents)*

■ *inspiring*

Source market: France
Base: All respondents
Number of respondents: 1,000

17%

36%

35%

8%

5%

top-two-box*

■ 5 = "very relevant"

■ 4 =

53%

■ 3 =

bottom-two-box*

■ 2 =

■ 1 = "not at all relevant"

12%

DESTINATION BRAND 22

Ø** = 3.5

* Deviations of 1% from the sum of the individual values are possible due to rounding.

** Scale from "5 = very relevant" to "1 = not at all relevant"

Source: inspektour (international) GmbH, 2022

4. Demand: General relevance – *Profile characteristics in detail*

General relevance of the characteristic: "natural"

> *Just as people have certain character traits, tourist destinations can also be described using certain characteristics. How relevant are the following characteristics when you <u>choose a tourist destination</u> for a holiday trip with at least one overnight stay <u>in general</u> (i.e., regardless of a specific tourist destination)?*
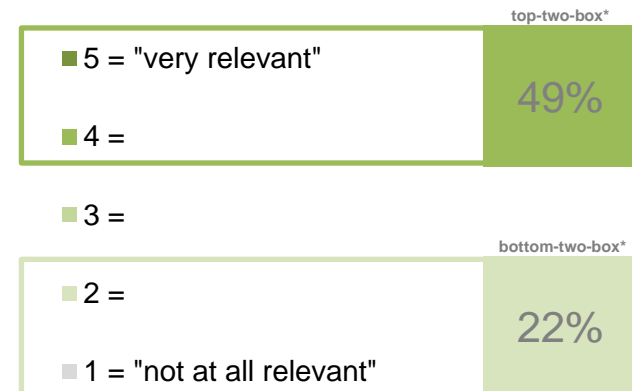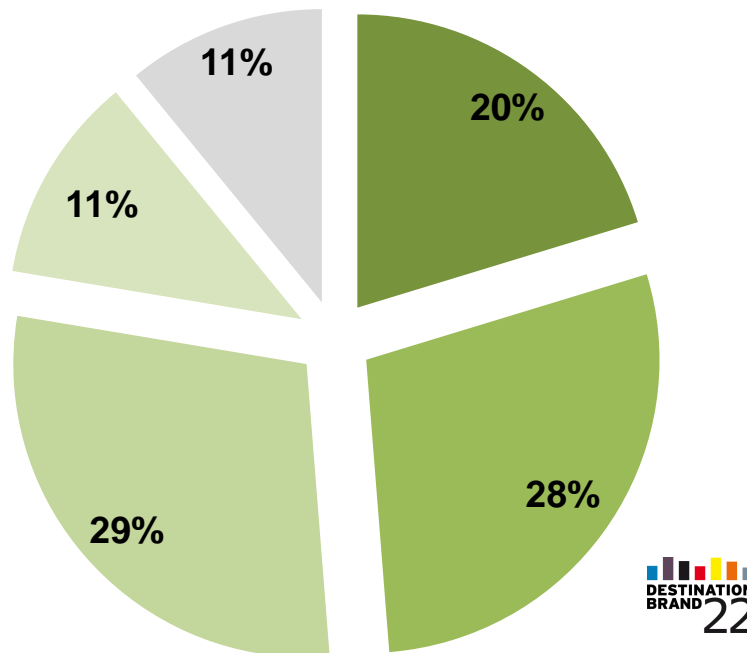
> *Values (in % of respondents)*

■ *natural*

Source market: France
Base: All respondents
Number of respondents: 1,000

25%

25%

5%

3%

41%

■ 5 = "very relevant"

■ 4 =

top-two-box*

67%

■ 3 =

bottom-two-box*

■ 2 =

8%

■ 1 = "not at all relevant"

DESTINATION BRAND 22

Ø** = 3.8

* Deviations of 1% from the sum of the individual values are possible due to rounding.

** Scale from "5 = very relevant" to "1 = not at all relevant"

4. Demand: General relevance – *Profile characteristics in detail*

General relevance of the characteristic: "opportunity to experience wine culture"

> *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)?*
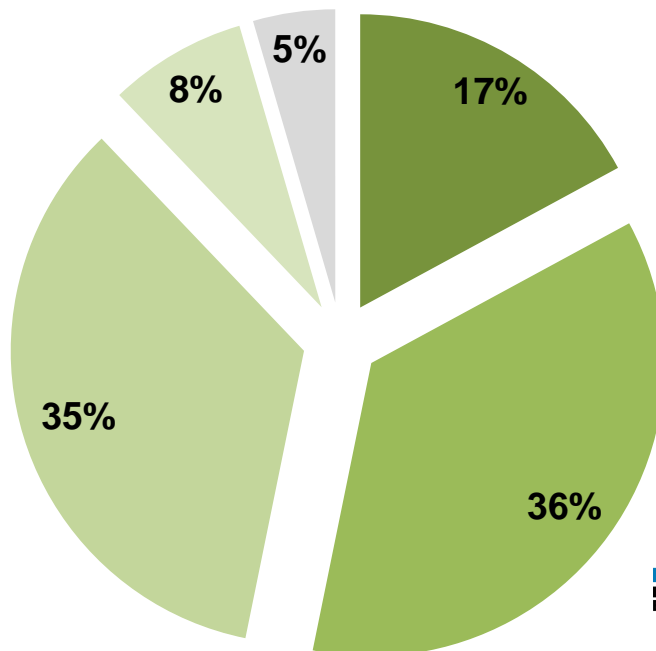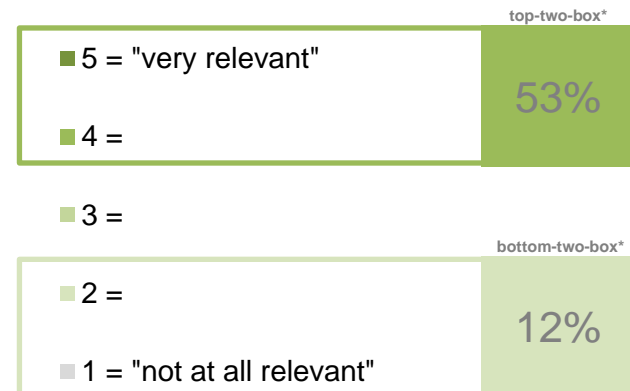
> *Values (in % of respondents)*

■ *experience wine culture*

Source market: France
Base: All respondents
Number of respondents: 1,000
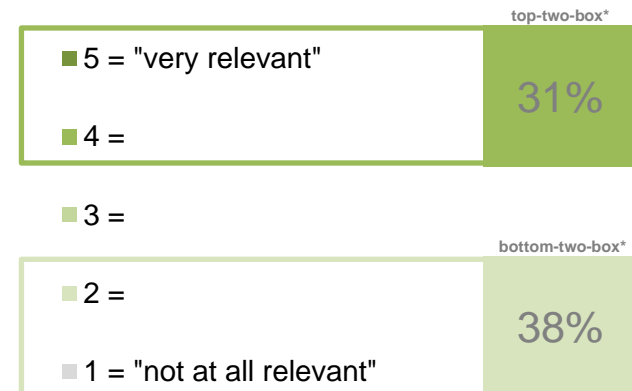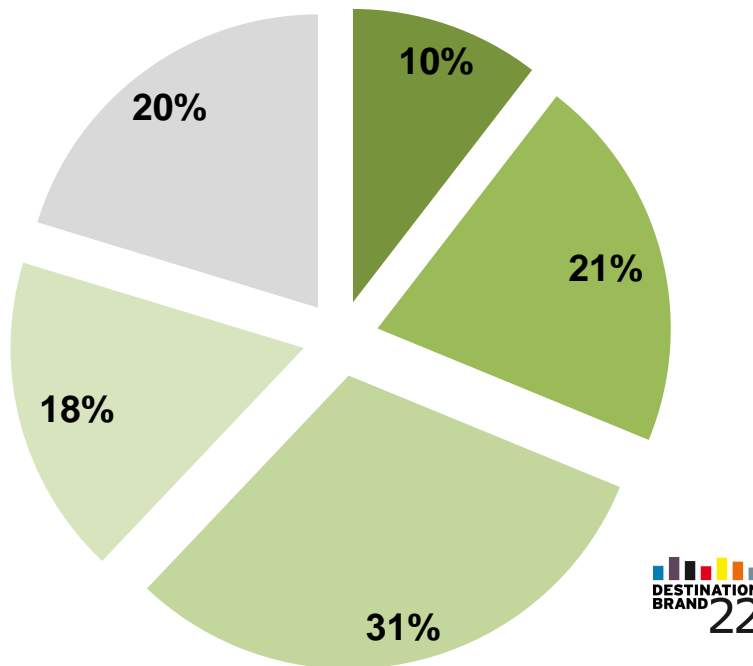
- 10%
- 21%
- 31%
- 18%
- 20%

■ 5 = "very relevant"

■ 4 =

top-two-box*

31%

■ 3 =

bottom-two-box*

■ 2 =

38%

■ 1 = "not at all relevant"

Ø** = 2.8

*   Deviations of 1% from the sum of the individual values are possible due to rounding.

** Scale from "5 = very relevant" to "1 = not at all relevant"

4. Demand: General relevance – *Profile characteristics in detail*

General relevance of the characteristic: "rural / scenic"

> *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)?*
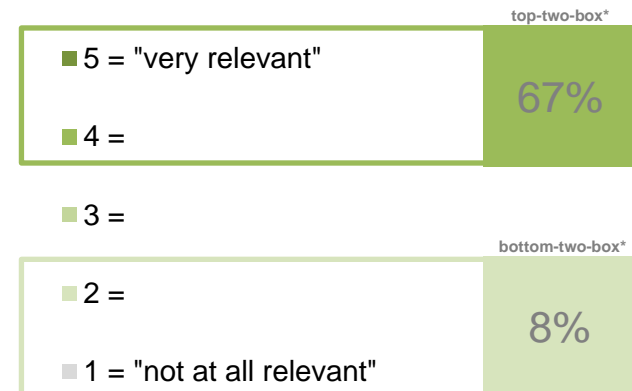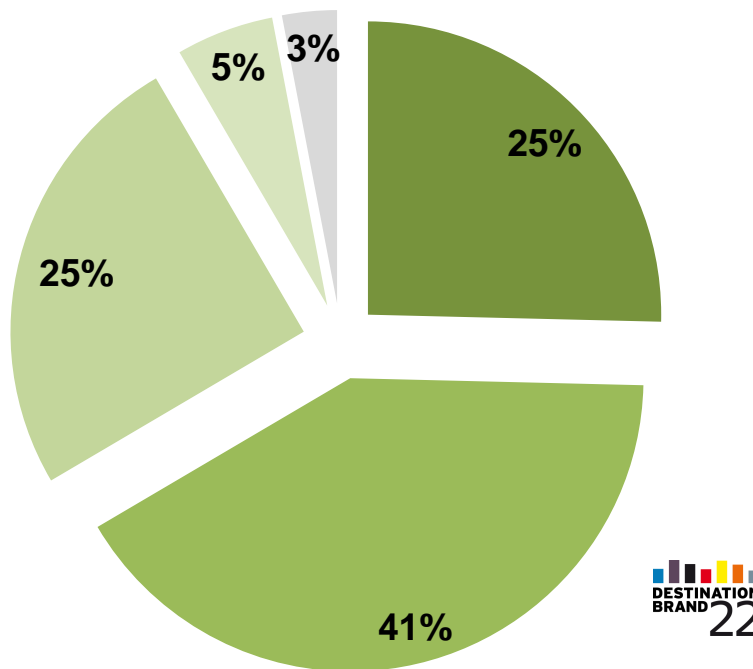
> *Values (in % of respondents)*

■ *rural / scenic*

Source market: France
Base: All respondents
Number of respondents: 1,000

Pie chart values: 19%, 36%, 32%, 7%, 5%

top-two-box*
■ 5 = "very relevant"
■ 4 =
55%

■ 3 =

bottom-two-box*
■ 2 =
■ 1 = "not at all relevant"
13%

Ø** = 3.6

DESTINATION BRAND 22

Source: inspektour (international) GmbH, 2022

* Deviations of 1% from the sum of the individual values are possible due to rounding.

** Scale from "5 = very relevant" to "1 = not at all relevant"

Outline

5.1 Supply: Supported evaluation of characteristics – *Results of univariate analysis*

Supported evaluation of the characteristic: "attractive"

> *Just as people have certain character traits, tourist destinations can also be described using certain characteristics. Please indicate to what extent the following characteristics are applicable to the following <u>international</u> tourist destination?*

> *Values (in % of respondents)*

■ *Région de Navarre*

Source market: France
Base: All respondents
Number of respondents: 1,000

Pie chart values: 7%, 11%, 6%, 2%, 1%, 74%

- ■ 5 = "completely applicable"
- ■ 4 =

top-two-box* **18%**

- ■ 3 =

- ■ 2 =
- ■ 1 = "not at all applicable"

bottom-two-box* **3%**

- ■ don't know

Ø** = 3.8

DESTINATION BRAND 22

* Deviations of 1% from the sum of the individual values are possible due to rounding.

** Scale from "5 = completely applicable" to "1 = not at all applicable"

Source: inspektour (international) GmbH, 2022

5.1 Supply: Supported evaluation of characteristics – *Results of univariate analysis*

Supported evaluation of the characteristic: "authentic / genuine"

> *Just as people have certain character traits, tourist destinations can also be described using certain characteristics. Please indicate to what extent the following characteristics are applicable to the following <u>international</u> tourist destination?*

> *Values (in % of respondents)*

■ *Région de Navarre*

Source market: France
Base: All respondents
Number of respondents: 1,000

- 9%
- 12%
- 4%
- 1%
- 0,3%
- 74%

top-two-box*

■ 5 = "completely applicable"

■ 4 =

21%

■ 3 =

bottom-two-box*

■ 2 =

■ 1 = "not at all applicable"

1%

■ don't know

Ø** = 4.1

DESTINATION BRAND 22

* Deviations of 1% from the sum of the individual values are possible due to rounding.

** Scale from "5 = completely applicable" to "1 = not at all applicable"

5.1 Supply: Supported evaluation of characteristics – *Results of univariate analysis*

Supported evaluation of the characteristic: "hospitable"

> Just as people have certain character traits, tourist destinations can also be described using certain characteristics. Please indicate to what extent the following characteristics are applicable to the following <u>international</u> tourist destination?

> Values (in % of respondents)

■ *Région de Navarre*

Source market: France
Base: All respondents
Number of respondents: 1,000

- 7%
- 11%
- 5%
- 2%
- 1%
- 75%

top-two-box*

- ■ 5 = "completely applicable"
- ■ 4 =

18%

- ■ 3 =

bottom-two-box*

- ■ 2 =
- ■ 1 = "not at all applicable"

2%

- ■ don't know

Ø** = 3.9

DESTINATION
BRAND 22

* Deviations of 1% from the sum of the individual values are possible due to rounding.

** Scale from "5 = completely applicable" to "1 = not at all applicable"

5.1 Supply: Supported evaluation of characteristics – *Results of univariate analysis*

Supported evaluation of the characteristic: "offering a lot of variety"

> *Just as people have certain character traits, tourist destinations can also be described using certain characteristics. Please indicate to what extent the following characteristics are applicable to the following <u>international</u> tourist destination?*
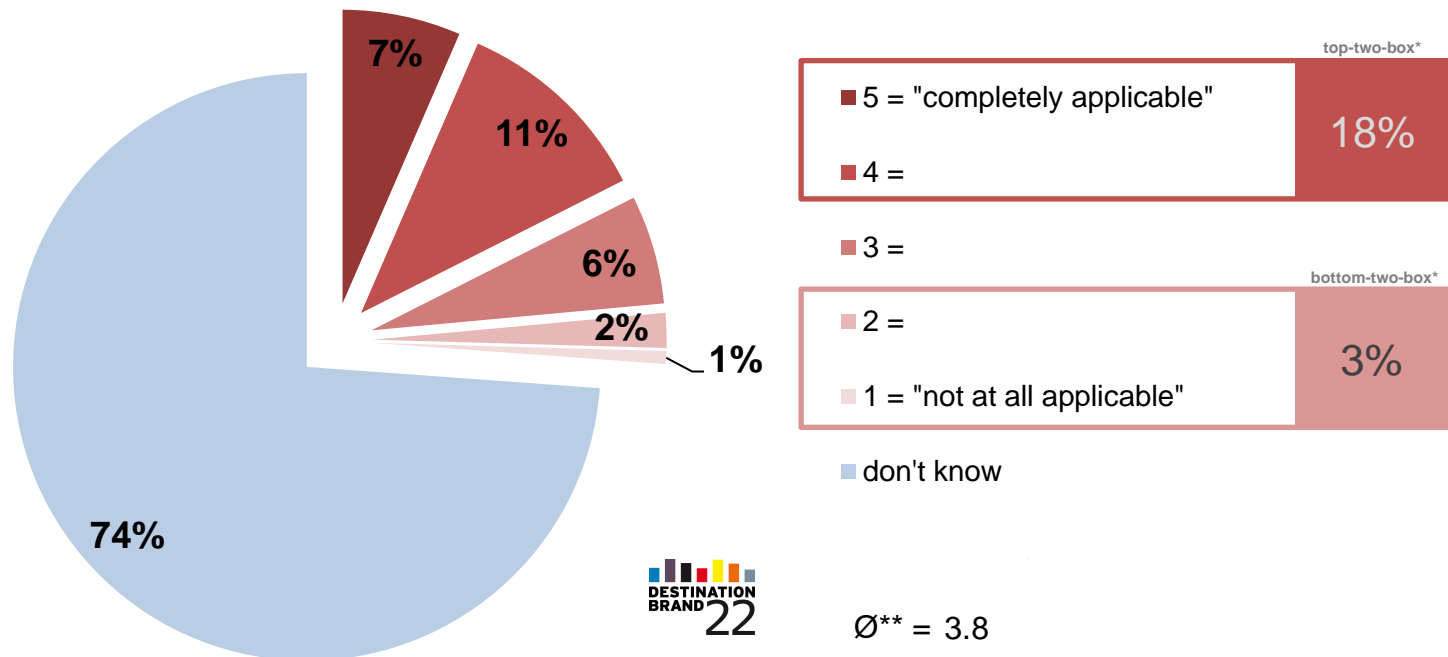
> *Values (in % of respondents)*

■ *Région de Navarre*

Source market: France
Base: All respondents
Number of respondents: 1,000

- 7%
- 10%
- 6%
- 2%
- 0,5%
- 74%

top-two-box*

■ 5 = "completely applicable"
■ 4 =

17%

■ 3 =

bottom-two-box*

■ 2 =
■ 1 = "not at all applicable"

2%

■ don't know

Ø** = 3.8

DESTINATION
BRAND 22

* Deviations of 1% from the sum of the individual values are possible due to rounding.

** Scale from "5 = completely applicable" to "1 = not at all applicable"

Source: inspektour (international) GmbH, 2022

5.1 Supply: Supported evaluation of characteristics – *Results of univariate analysis*

Supported evaluation of the characteristic: "sustainable"

> *Just as people have certain character traits, tourist destinations can also be described using certain characteristics. Please indicate to what extent the following characteristics are applicable to the following <u>international</u> tourist destination?*
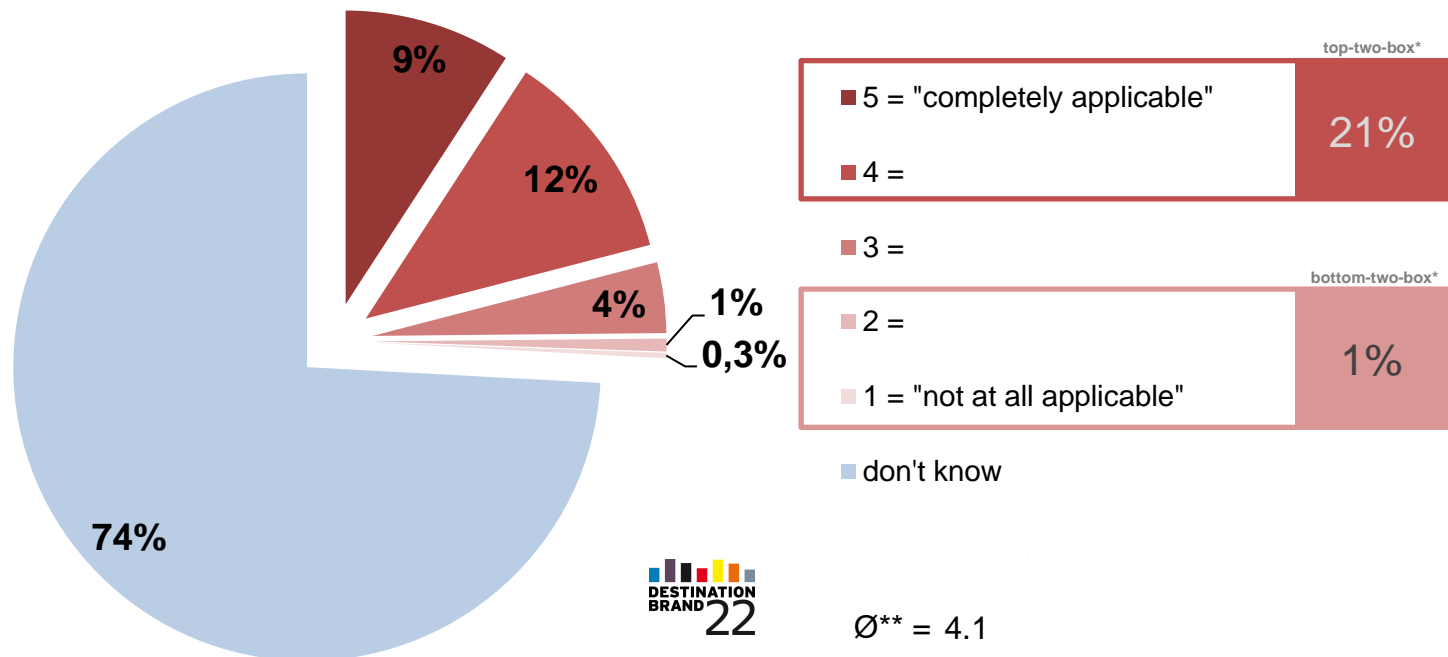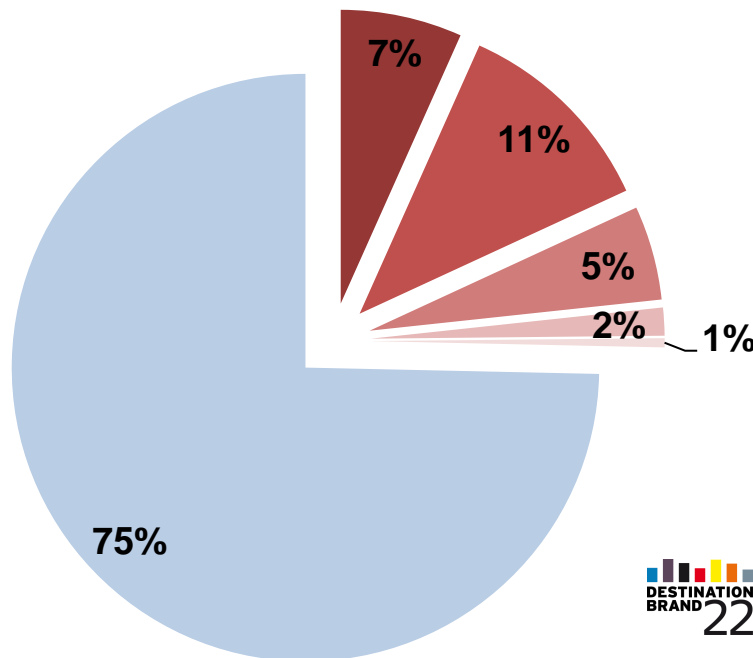
> *Values (in % of respondents)*

■ *Région de Navarre*

Source market: France
Base: All respondents
Number of respondents: 1,000

5%
8%
6%
2%
1%
79%

top-two-box*

■ 5 = "completely applicable"

■ 4 =

13%

■ 3 =

bottom-two-box*

■ 2 =

■ 1 = "not at all applicable"

3%

■ don't know

DESTINATION BRAND 22

Ø** = 3.7

* Deviations of 1% from the sum of the individual values are possible due to rounding.

** Scale from "5 = completely applicable" to "1 = not at all applicable"

Source: inspektour (international) GmbH, 2022

sustainable

5.1 Supply: Supported evaluation of characteristics – *Results of univariate analysis*

Supported evaluation of the characteristic: "family-friendly"

> *Just as people have certain character traits, tourist destinations can also be described using certain characteristics. Please indicate to what extent the following characteristics are applicable to the following <u>international</u> tourist destination?*
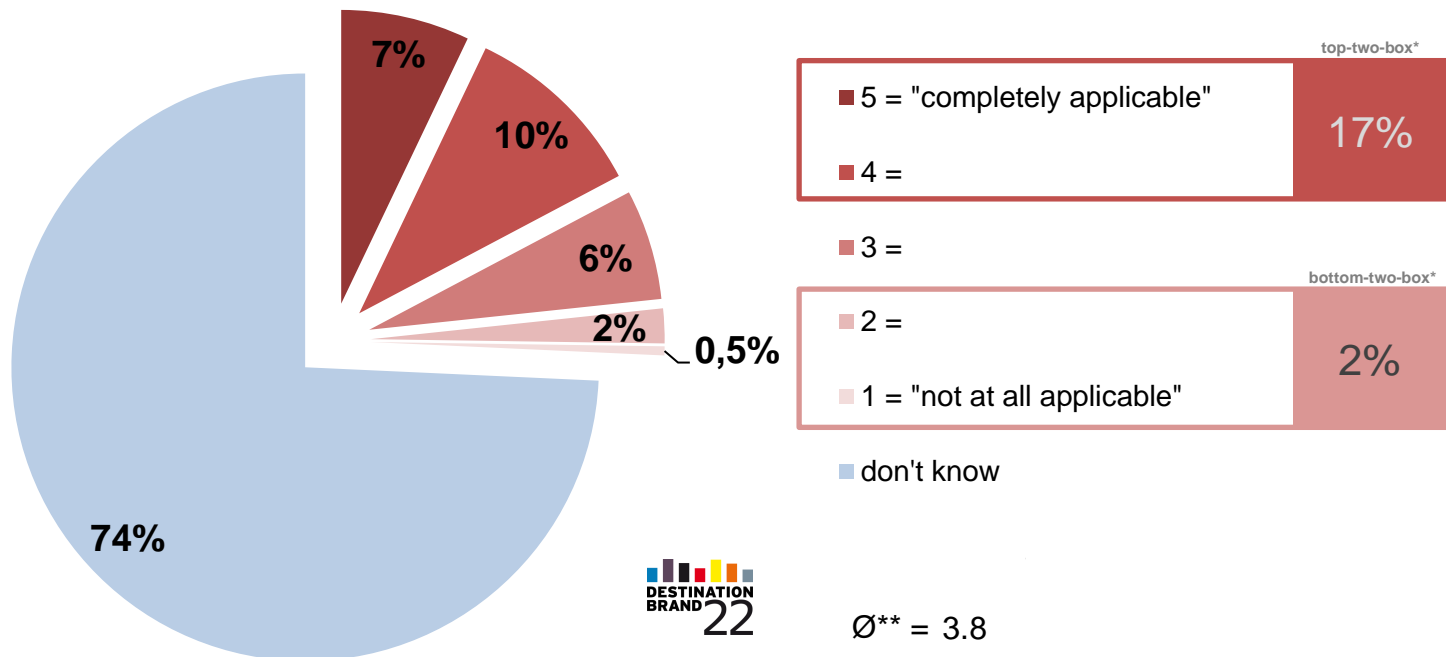
> *Values (in % of respondents)*

■ *Région de Navarre*

Source market: France
Base: All respondents
Number of respondents: 1,000

7%

12%

5%

1%

0,3%

76%

top-two-box*

■ 5 = "completely applicable"

■ 4 =

18%

■ 3 =

bottom-two-box*

■ 2 =

■ 1 = "not at all applicable"

1%

■ don't know

Ø** = 4.0

DESTINATION BRAND 22

* Deviations of 1% from the sum of the individual values are possible due to rounding.

** Scale from "5 = completely applicable" to "1 = not at all applicable"

5.1 Supply: Supported evaluation of characteristics – *Results of univariate analysis*

Supported evaluation of the characteristic: "inspiring"

> *Just as people have certain character traits, tourist destinations can also be described using certain characteristics. Please indicate to what extent the following characteristics are applicable to the following <u>international</u> tourist destination?*

> *Values (in % of respondents)*

■ *Région de Navarre*

Source market: France
Base: All respondents
Number of respondents: 1,000

Pie chart values: 7%, 11%, 6%, 2%, 0,3%, 74%

top-two-box*

■ 5 = "completely applicable"

■ 4 =

17%

■ 3 =

bottom-two-box*

■ 2 =

■ 1 = "not at all applicable"

2%

■ don't know

Ø** = 3.8

* Deviations of 1% from the sum of the individual values are possible due to rounding.

** Scale from "5 = completely applicable" to "1 = not at all applicable"

5.1 Supply: Supported evaluation of characteristics – *Results of univariate analysis*

Supported evaluation of the characteristic: "natural"

> Just as people have certain character traits, tourist destinations can also be described using certain characteristics. Please indicate to what extent the following characteristics are applicable to the following <u>international</u> tourist destination?
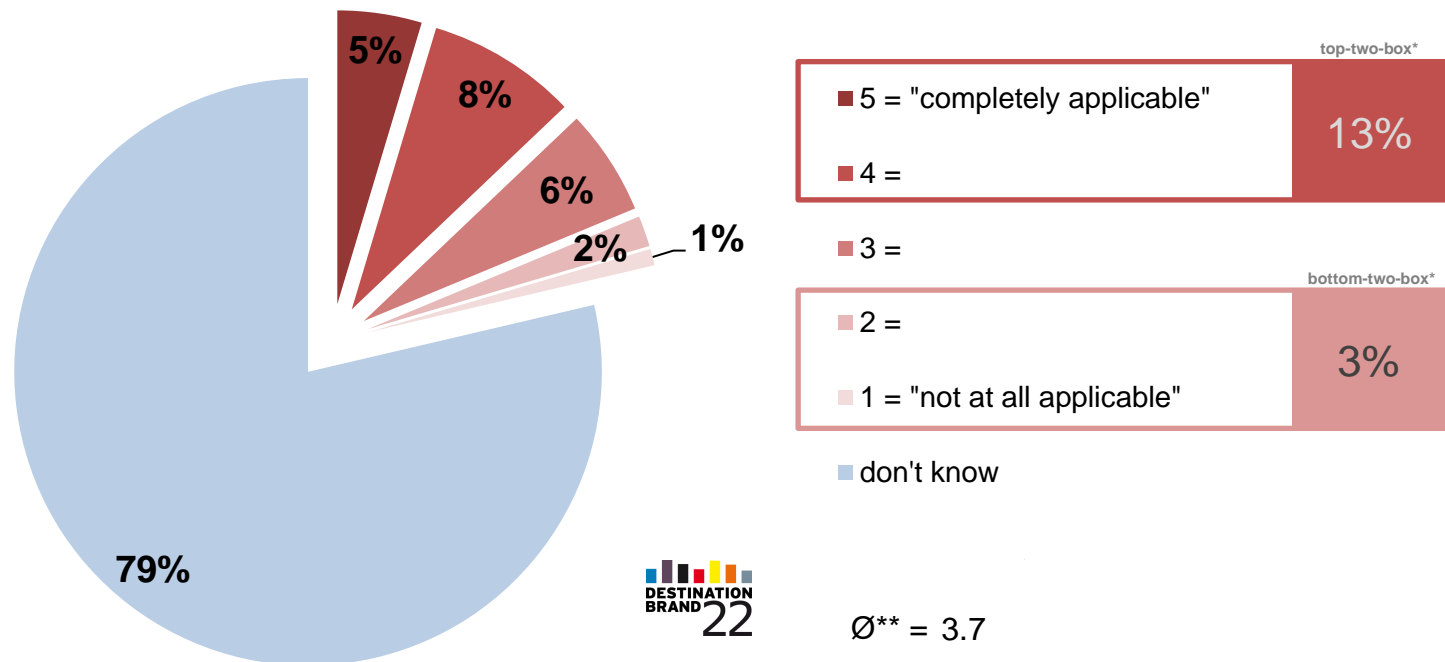
> Values (in % of respondents)

■ *Région de Navarre*

Source market: France
Base: All respondents
Number of respondents: 1,000

- ■ 5 = "completely applicable"
- ■ 4 =

top-two-box*

20%

- ■ 3 =

- ■ 2 =
- ■ 1 = "not at all applicable"

bottom-two-box*

1%

- ■ don't know

Ø** = 4.0

9%
11%
5%
1%
1%
74%

DESTINATION
BRAND 22

* Deviations of 1% from the sum of the individual values are possible due to rounding.

** Scale from "5 = completely applicable" to "1 = not at all applicable"

5.1 Supply: Supported evaluation of characteristics – *Results of univariate analysis*

Supported evaluation of the characteristic: "opportunity to experience wine culture"

> *Just as people have certain character traits, tourist destinations can also be described using certain characteristics. Please indicate to what extent the following characteristics are applicable to the following <u>international</u> tourist destination?*
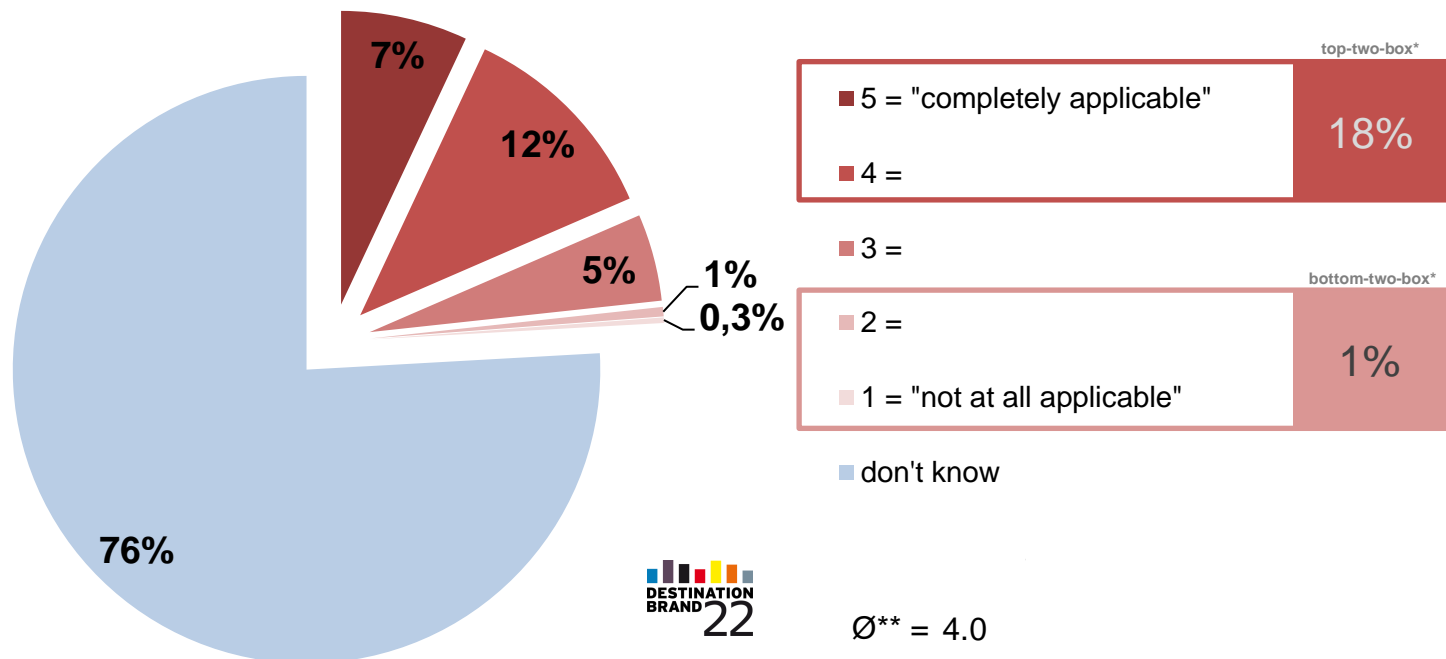
> *Values (in % of respondents)*

■ *Région de Navarre*

Source market: France
Base: All respondents
Number of respondents: 1,000

6%

8%

6%

2%

1%

77%

top-two-box*

■ 5 = "completely applicable"

■ 4 =

14%

■ 3 =

bottom-two-box*

■ 2 =

■ 1 = "not at all applicable"

3%

■ don't know

Ø** = 3.7

DESTINATION BRAND 22

* Deviations of 1% from the sum of the individual values are possible due to rounding.

** Scale from "5 = completely applicable" to "1 = not at all applicable"

Source: inspektour (international) GmbH, 2022

5.1 Supply: Supported evaluation of characteristics – *Results of univariate analysis*

Supported evaluation of the characteristic: "rural / scenic"

> *Just as people have certain character traits, tourist destinations can also be described using certain characteristics. Please indicate to what extent the following characteristics are applicable to the following* <u>*international*</u> *tourist destination?*
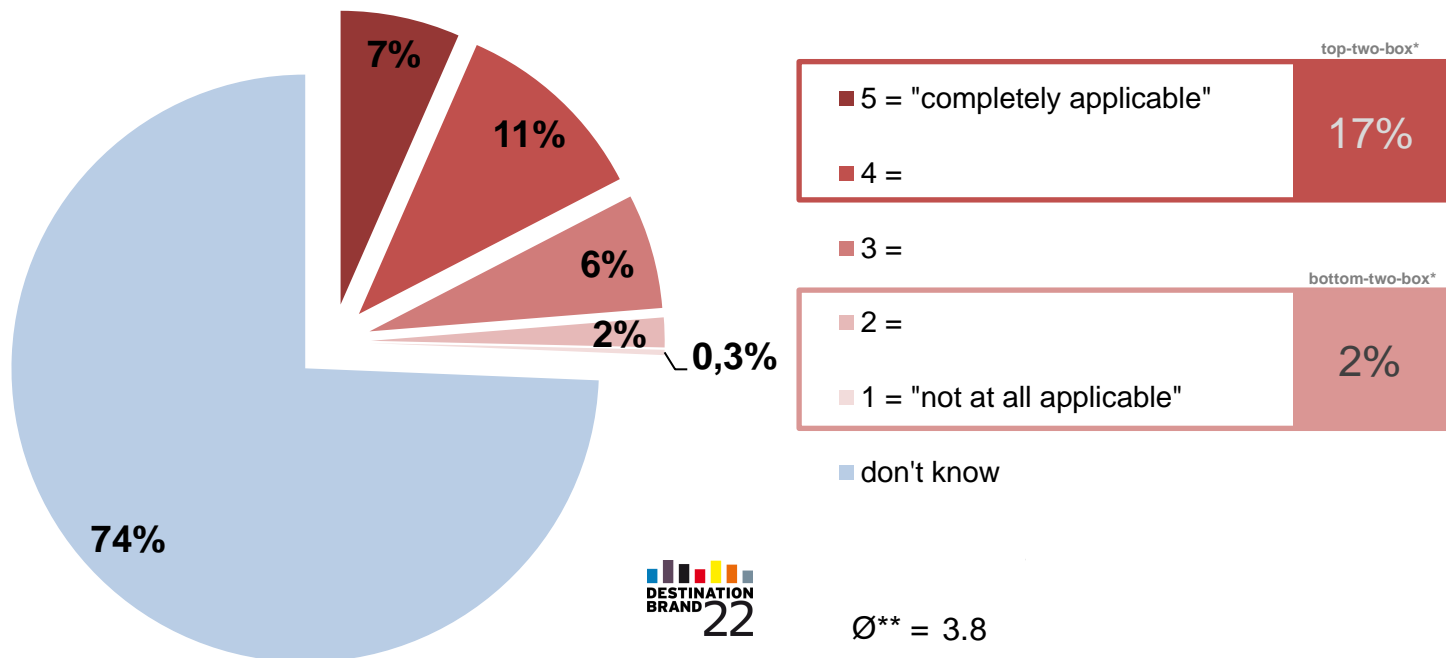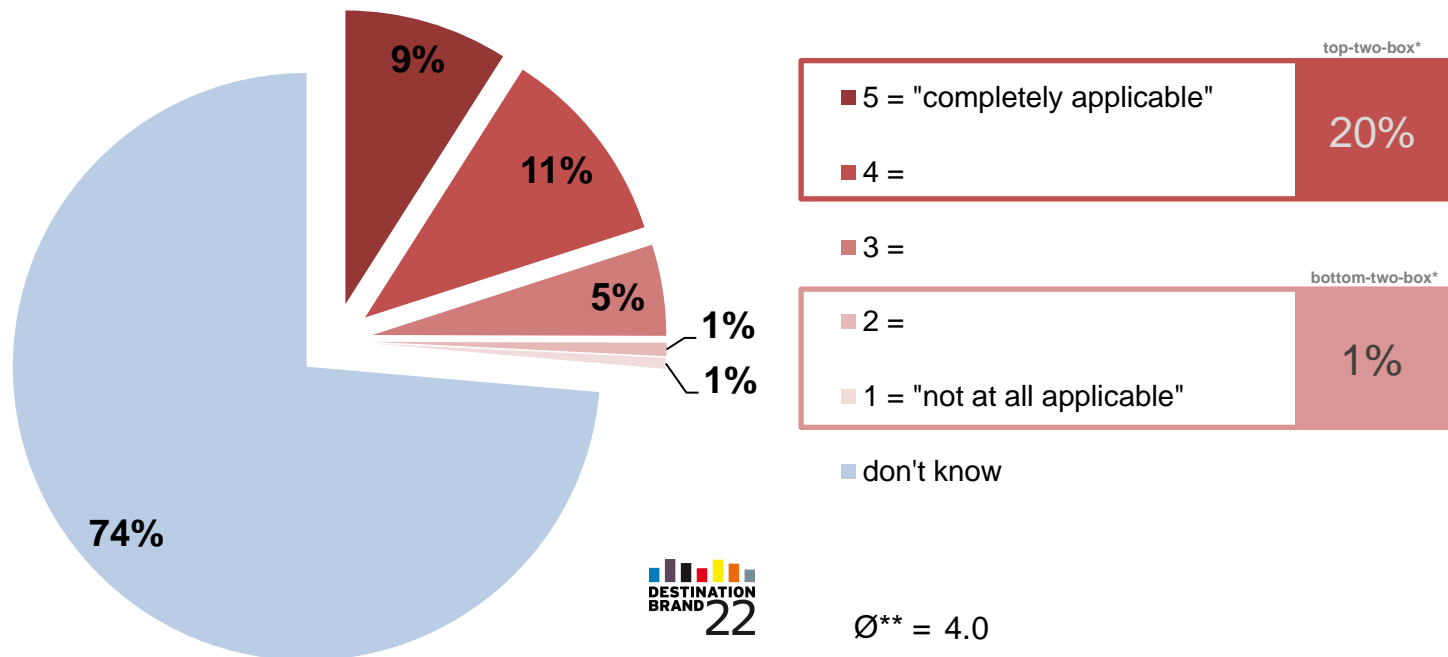
> *Values (in % of respondents)*

■ *Région de Navarre*

Source market: France
Base: All respondents
Number of respondents: 1,000

10%
11%
4%
1%
0,4%
73%

■ 5 = "completely applicable"
■ 4 =

top-two-box*
21%

■ 3 =

bottom-two-box*
1%

■ 2 =
■ 1 = "not at all applicable"

■ don't know

DESTINATION
BRAND 22

Ø** = 4.1

* Deviations of 1% from the sum of the individual values are possible due to rounding.

** Scale from "5 = completely applicable" to "1 = not at all applicable"

Source: inspektour (international) GmbH, 2022

Outline

1 GENERAL OVERVIEW OF THE STUDY SERIES DESTINATION BRAND

2 DESIGN OF THE PROFILE STUDY DESTINATION BRAND 22

3 OVERVIEW OF KEY RESULTS: THREE-DIMENSIONAL COMPETITOR ANALYSIS

4 DEMAND: GENERAL RELEVANCE PER PROFILE CHARACTERISTIC IN DETAIL

5 SUPPLY: SUPPORTED EVALUATION OF PROFILE CHARACTERISTICS IN DETAIL

    5.1 Results of univariate analysis

    5.2 Sociodemographic differentiation

    5.3 Standard target group analysis

6 COMPETITION: COMPARISON WITH COMPETITORS PER PROFILE CHARACTERISTIC

7 CONTACT AND PROJECT PARTNERS

8 APPENDIX

IMPRINT

5.2 Supply: Supported evaluation of characteristics – *Sociodemographic differentiation*

Supported evaluation of characteristics of the general characteristics

> Just as people have certain character traits, tourist destinations can also be described using certain characteristics. Please indicate to what extent the following characteristics are applicable to the following international tourist destination?
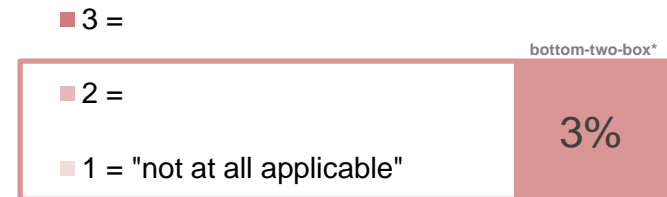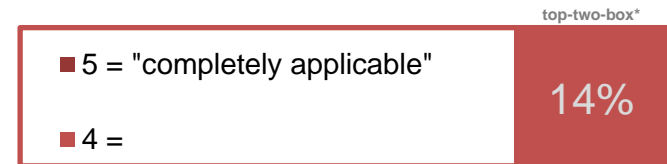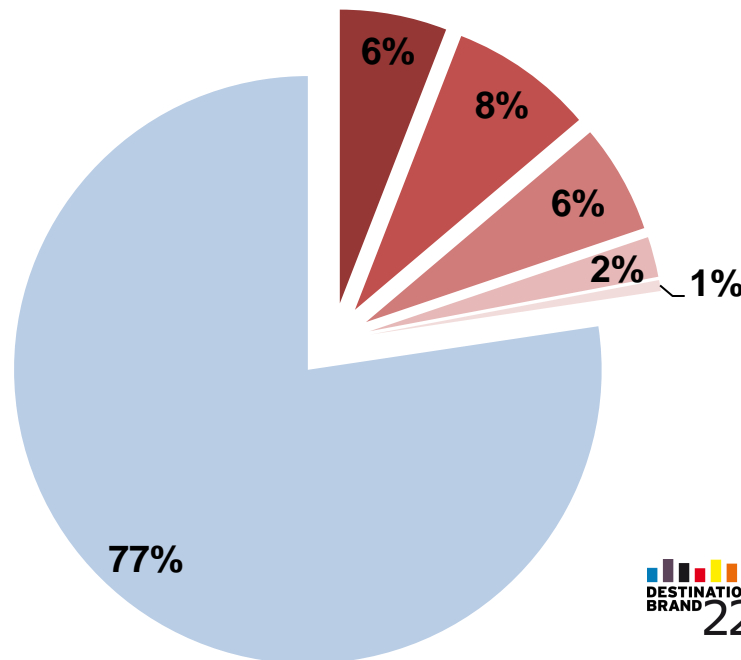
> Top-two-box on a scale from "5 = completely applicable" to "1 = not at all applicable" (in % of respondents)

■ *Région de Navarre*

Source market: France
Sociodemography: Sex
Base: All respondents
Number of respondents: 1,000

General characteristics	total	Sex		Significance* (Kruskal-Wallis-test)
		male	female	
attractive	18%	20%	15%	n.s.
authentic / genuine	21%	23%	19%	n.s.
hospitable	18%	20%	16%	n.s.
offering a lot of variety	17%	20%	15%	n.s.
sustainable	13%	14%	12%	n.s.

DESTINATION BRAND 22

* Level of significance min. 0.05 (abbreviations: sig. = significant / n.s. = not significant, for further information see glossary)

Source: inspektour (international) GmbH, 2022

TOURISM AND MARKET RESEARCH

5.2 Supply: Supported evaluation of characteristics – *Sociodemographic differentiation*

Supported evaluation of characteristics of the specific characteristics

> *Just as people have certain character traits, tourist destinations can also be described using certain characteristics. Please indicate to what extent the following characteristics are applicable to the following <u>international</u> tourist destination?*
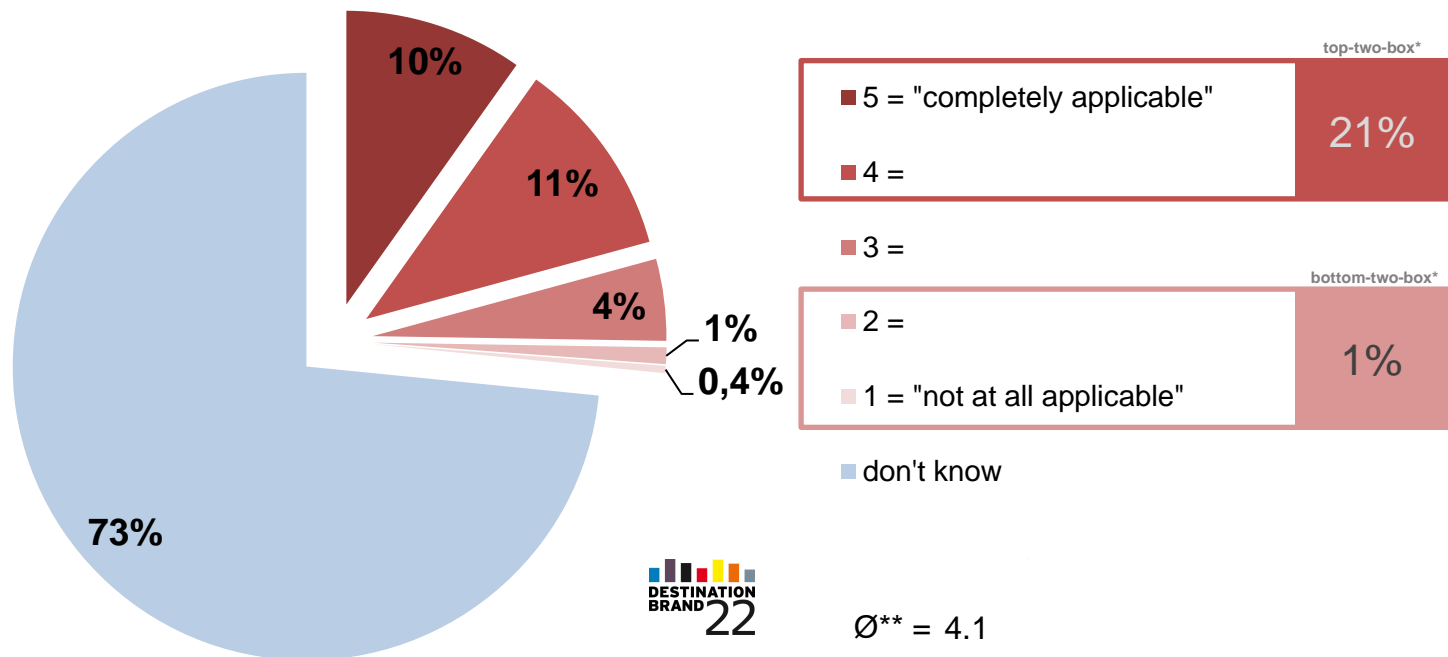
> *Top-two-box on a scale from "5 = completely applicable" to "1 = not at all applicable" (in % of respondents)*

■ *Région de Navarre*

Source market: France
Sociodemography: Sex
Base: All respondents
Number of respondents: 1,000

Specific characteristics	total	Sex		Significance* (Kruskal-Wallis-test)
		male	female	
family-friendly	18%	20%	17%	n.s.
inspiring	17%	19%	16%	n.s.
natural	20%	22%	18%	n.s.
opportunity to experience wine culture	14%	16%	11%	n.s.
rural / scenic	21%	23%	19%	n.s.

* Level of significance min. 0.05 (abbreviations: sig. = significant / n.s. = not significant, for further information see glossary)

Source: inspektour (international) GmbH, 2022

5.2 Supply: Supported evaluation of characteristics – *Sociodemographic differentiation*

Supported evaluation of characteristics of the general characteristics

> *Just as people have certain character traits, tourist destinations can also be described using certain characteristics. Please indicate to what extent the following characteristics are applicable to the following <u>international</u> tourist destination?*

> *Top-two-box on a scale from "5 = completely applicable" to "1 = not at all applicable" (in % of respondents)*

■ *Région de Navarre*

Source market: France
Sociodemography: Age group
Base: All respondents
Number of respondents: 1,000

General characteristics	total	Age group						Significance* (Kruskal-Wallis-test)
		14-24 y.	25-34 y.	35-44 y.	45-54 y.	55-64 y.	65-74 y.	
attractive	18%	11%	14%	11%	23%	20%	32%	n.s.
authentic / genuine	21%	12%	14%	18%	25%	27%	35%	n.s.
hospitable	18%	11%	13%	15%	23%	20%	31%	n.s.
offering a lot of variety	17%	9%	13%	14%	22%	20%	32%	sig.
sustainable	13%	10%	11%	9%	12%	17%	21%	sig.

DESTINATION BRAND 22

* Level of significance min. 0.05 (abbreviations: sig. = significant / n.s. = not significant, for further information see glossary)

Source: inspektour (international) GmbH, 2022

5.2 Supply: Supported evaluation of characteristics – *Sociodemographic differentiation*

Supported evaluation of characteristics of the specific characteristics

> *Just as people have certain character traits, tourist destinations can also be described using certain characteristics. Please indicate to what extent the following characteristics are applicable to the following* <u>*international*</u> *tourist destination?*

> *Top-two-box on a scale from "5 = completely applicable" to "1 = not at all applicable" (in % of respondents)*

■ *Région de Navarre*

Source market: France
Sociodemography: Age group
Base: All respondents
Number of respondents: 1,000

Specific characteristics	total	Age group						Significance* (Kruskal-Wallis-test)
		14-24 y.	25-34 y.	35-44 y.	45-54 y.	55-64 y.	65-74 y.	
family-friendly	18%	11%	14%	14%	22%	26%	29%	sig.
inspiring	17%	11%	14%	13%	21%	22%	31%	n.s.
natural	20%	10%	13%	18%	26%	24%	34%	sig.
opportunity to experience wine culture	14%	8%	13%	12%	17%	16%	20%	n.s.
rural / scenic	21%	10%	14%	19%	26%	26%	34%	n.s.

DESTINATION BRAND 22

* Level of significance min. 0.05 (abbreviations: sig. = significant / n.s. = not significant, for further information see glossary)

Source: inspektour (international) GmbH, 2022

5.2 Supply: Supported evaluation of characteristics – *Sociodemographic differentiation*

Supported evaluation of characteristics of the general characteristics

> *Just as people have certain character traits, tourist destinations can also be described using certain characteristics. Please indicate to what extent the following characteristics are applicable to the following* <u>*international*</u> *tourist destination?*

> *Top-two-box on a scale from "5 = completely applicable" to "1 = not at all applicable" (in % of respondents)*

■ *Région de Navarre*

Source market: France
Sociodemography: Formal education
Base: All respondents
Number of respondents: 1,000

General characteristics	total	Formal education (1% of the 1,000 respondents do not fit into the listed classifications of formal education.)				Significance* (Kruskal-Wallis-test)
		lower secondary education**	middle secondary education	high secondary education	tertiary education	
attractive	18%	10%	14%	17%	20%	n.s.
authentic / genuine	21%	14%	17%	20%	23%	n.s.
hospitable	18%	10%	16%	17%	20%	n.s.
offering a lot of variety	17%	12%	16%	16%	19%	n.s.
sustainable	13%	12%	12%	12%	14%	n.s.

* Level of significance min. 0.05 (abbreviations: sig. = significant / n.s. = not significant, for further information see glossary)

DESTINATION BRAND 22

Source: inspektour (international) GmbH, 2022

** Sample size < 100: Higher statistical uncertainty due to relatively small sample size.

5.2 Supply: Supported evaluation of characteristics – *Sociodemographic differentiation*

Supported evaluation of characteristics of the specific characteristics

> Just as people have certain character traits, tourist destinations can also be described using certain characteristics. Please indicate to what extent the following characteristics are applicable to the following <u>international</u> tourist destination?

> Top-two-box on a scale from "5 = completely applicable" to "1 = not at all applicable" (in % of respondents)

■ *Région de Navarre*

Source market: France
Sociodemography: Formal education
Base: All respondents
Number of respondents: 1,000

Specific characteristics	total	Formal education (1% of the 1,000 respondents do not fit into the listed classifications of formal education.)				Significance* (Kruskal-Wallis-test)
		lower secondary education**	middle secondary education	high secondary education	tertiary education	
family-friendly	18%	12%	17%	17%	20%	n.s.
inspiring	17%	14%	16%	17%	19%	n.s.
natural	20%	10%	19%	20%	22%	n.s.
opportunity to experience wine culture	14%	4%	11%	12%	16%	n.s.
rural / scenic	21%	10%	20%	20%	23%	n.s.

DESTINATION BRAND 22

* Level of significance min. 0.05 (abbreviations: sig. = significant / n.s. = not significant, for further information see glossary)

Source: inspektour (international) GmbH, 2022

** Sample size < 100: Higher statistical uncertainty due to relatively small sample size.

5.2 Supply: Supported evaluation of characteristics – *Sociodemographic differentiation*

Supported evaluation of characteristics of the general characteristics

> *Just as people have certain character traits, tourist destinations can also be described using certain characteristics. Please indicate to what extent the following characteristics are applicable to the following* <u>*international*</u> *tourist destination?*

> *Top-two-box on a scale from "5 = completely applicable" to "1 = not at all applicable" (in % of respondents)*

■ *Région de Navarre*

Source market: France
Sociodemography: Household size
Base: All respondents
Number of respondents: 1,000

General characteristics	total	Household size				Significance* (Kruskal-Wallis-test)
		1-person-hh	2-person-hh	3-person-hh	4 and more persons in hh	
attractive	18%	17%	23%	13%	14%	n.s.
authentic / genuine	21%	21%	26%	17%	16%	n.s.
hospitable	18%	21%	22%	15%	13%	n.s.
offering a lot of variety	17%	20%	20%	14%	13%	n.s.
sustainable	13%	11%	15%	11%	12%	n.s.

DESTINATION BRAND 22

* Level of significance min. 0.05 (abbreviations: sig. = significant / n.s. = not significant, for further information see glossary)

Source: inspektour (international) GmbH, 2022

5.2 Supply: Supported evaluation of characteristics – *Sociodemographic differentiation*

Supported evaluation of characteristics of the specific characteristics

> *Just as people have certain character traits, tourist destinations can also be described using certain characteristics. Please indicate to what extent the following characteristics are applicable to the following* <u>*international*</u> *tourist destination?*

> *Top-two-box on a scale from "5 = completely applicable" to "1 = not at all applicable" (in % of respondents)*

■ *Région de Navarre*

Source market: France
Sociodemography: Household size
Base: All respondents
Number of respondents: 1,000

Specific characteristics	total	Household size				Significance* (Kruskal-Wallis-test)
		1-person-hh	2-person-hh	3-person-hh	4 and more persons in hh	
family-friendly	18%	19%	22%	16%	14%	n.s.
inspiring	17%	15%	22%	14%	16%	n.s.
natural	20%	21%	25%	15%	17%	n.s.
opportunity to experience wine culture	14%	12%	17%	13%	11%	n.s.
rural / scenic	21%	20%	26%	17%	17%	n.s.

* Level of significance min. 0.05 (abbreviations: sig. = significant / n.s. = not significant, for further information see glossary)

Source: inspektour (international) GmbH, 2022

5.2 Supply: Supported evaluation of characteristics – *Sociodemographic differentiation*

Supported evaluation of characteristics of the general characteristics

> *Just as people have certain character traits, tourist destinations can also be described using certain characteristics. Please indicate to what extent the following characteristics are applicable to the following international tourist destination?*

> *Top-two-box on a scale from "5 = completely applicable" to "1 = not at all applicable" (in % of respondents)*

■ *Région de Navarre*

Source market: France
Sociodemography: Children < 14 y. in hh
Base: All respondents
Number of respondents: 1,000

General characteristics	total	Children < 14 years living in household			Significance* (Kruskal-Wallis-test)
		hh without children under 14 years	hh with 1 child under 14 years	hh with 2 and more children under 14 y.	
attractive	18%	19%	15%	12%	n.s.
authentic / genuine	21%	23%	17%	15%	n.s.
hospitable	18%	20%	14%	12%	n.s.
offering a lot of variety	17%	19%	12%	14%	n.s.
sustainable	13%	14%	10%	12%	n.s.

* Level of significance min. 0.05 (abbreviations: sig. = significant / n.s. = not significant, for further information see glossary)

DESTINATION BRAND 22

Source: inspektour (international) GmbH, 2022

5.2 Supply: Supported evaluation of characteristics – *Sociodemographic differentiation*

Supported evaluation of characteristics of the specific characteristics

> *Just as people have certain character traits, tourist destinations can also be described using certain characteristics. Please indicate to what extent the following characteristics are applicable to the following <u>international</u> tourist destination?*

> *Top-two-box on a scale from "5 = completely applicable" to "1 = not at all applicable" (in % of respondents)*

■ *Région de Navarre*

Source market: France
Sociodemography: Children < 14 y. in hh
Base: All respondents
Number of respondents: 1,000

Specific characteristics	total	Children < 14 years living in household			Significance* (Kruskal-Wallis-test)
		hh without children under 14 years	hh with 1 child under 14 years	hh with 2 and more children under 14 y.	
family-friendly	18%	20%	15%	13%	n.s.
inspiring	17%	18%	16%	15%	n.s.
natural	20%	22%	15%	15%	n.s.
opportunity to experience wine culture	14%	15%	12%	12%	n.s.
rural / scenic	21%	23%	17%	14%	n.s.

DESTINATION BRAND 22

* Level of significance min. 0.05 (abbreviations: sig. = significant / n.s. = not significant, for further information see glossary)

Source: inspektour (international) GmbH, 2022

5.2 Supply: Supported evaluation of characteristics – *Sociodemographic differentiation*

Supported evaluation of characteristics of the general characteristics

> *Just as people have certain character traits, tourist destinations can also be described using certain characteristics. Please indicate to what extent the following characteristics are applicable to the following international tourist destination?*

> *Top-two-box on a scale from "5 = completely applicable" to "1 = not at all applicable" (in % of respondents)*

■ *Région de Navarre*

Source market: France
Sociodemography: Net household income**
Base: All respondents
Number of respondents: 1,000

General characteristics	total	Net household income**				Significance* (Kruskal-Wallis-test)
		under 1,500 euros	1,500 up to < 2,500 euros	2,500 up to < 4,000 euros	4,000 euros and more	
attractive	18%	11%	13%	22%	23%	n.s.
authentic / genuine	21%	13%	17%	26%	28%	sig.
hospitable	18%	13%	14%	22%	25%	n.s.
offering a lot of variety	17%	10%	14%	21%	22%	n.s.
sustainable	13%	8%	9%	17%	15%	n.s.

DESTINATION BRAND 22

* Level of significance min. 0.05 (abbreviations: sig. = significant / n.s. = not significant, for further information see glossary)

Source: inspektour (international) GmbH, 2022

** 8% of the 1,000 respondents did not disclose their net household income.

5.2 Supply: Supported evaluation of characteristics – *Sociodemographic differentiation*

Supported evaluation of characteristics of the specific characteristics

> *Just as people have certain character traits, tourist destinations can also be described using certain characteristics. Please indicate to what extent the following characteristics are applicable to the following international tourist destination?*

> *Top-two-box on a scale from "5 = completely applicable" to "1 = not at all applicable" (in % of respondents)*

■ *Région de Navarre*

Source market: France
Sociodemography: Net household income**
Base: All respondents
Number of respondents: 1,000

Specific characteristics	total	Net household income**				Significance* (Kruskal-Wallis-test)
		under 1,500 euros	1,500 up to < 2,500 euros	2,500 up to < 4,000 euros	4,000 euros and more	
family-friendly	18%	12%	13%	22%	27%	n.s.
inspiring	17%	10%	14%	20%	24%	n.s.
natural	20%	13%	17%	24%	26%	n.s.
opportunity to experience wine culture	14%	8%	10%	16%	21%	n.s.
rural / scenic	21%	12%	19%	24%	28%	n.s.

* Level of significance min. 0.05 (abbreviations: sig. = significant / n.s. = not significant, for further information see glossary)

DESTINATION BRAND 22

Source: inspektour (international) GmbH, 2022

** 8% of the 1,000 respondents did not disclose their net household income.

5.2 Supply: Supported evaluation of characteristics – *Sociodemographic differentiation*

Supported evaluation of characteristics of the general characteristics

> *Just as people have certain character traits, tourist destinations can also be described using certain characteristics. Please indicate to what extent the following characteristics are applicable to the following <u>international</u> tourist destination?*

> *Top-two-box on a scale from "5 = completely applicable" to "1 = not at all applicable" (in % of respondents)*

■ *Région de Navarre*

Source market: France
Sociodemography: Town size
Base: All respondents
Number of respondents: 1,000

General characteristics	total	Town size				Significance* (Kruskal-Wallis-test)
		under 5,000 inh.	5,000 up to < 20,000 inh.	20,000 up tp < 100,000 inh.	100,000 inh. and more	
attractive	18%	16%	17%	17%	22%	n.s.
authentic / genuine	21%	19%	21%	21%	24%	n.s.
hospitable	18%	16%	17%	18%	22%	sig.
offering a lot of variety	17%	16%	16%	18%	20%	sig.
sustainable	13%	12%	11%	14%	15%	n.s.

DESTINATION BRAND 22

* Level of significance min. 0.05 (abbreviations: sig. = significant / n.s. = not significant, for further information see glossary)

Source: inspektour (international) GmbH, 2022

5.2 Supply: Supported evaluation of characteristics – *Sociodemographic differentiation*

Supported evaluation of characteristics of the specific characteristics

> *Just as people have certain character traits, tourist destinations can also be described using certain characteristics. Please indicate to what extent the following characteristics are applicable to the following* <u>*international*</u> *tourist destination?*

> *Top-two-box on a scale from "5 = completely applicable" to "1 = not at all applicable" (in % of respondents)*

■ *Région de Navarre*

Source market: France
Sociodemography: Town size
Base: All respondents
Number of respondents: 1,000

Specific characteristics	total	Town size				Significance* (Kruskal-Wallis-test)
		under 5,000 inh.	5,000 up to < 20,000 inh.	20,000 up tp < 100,000 inh.	100,000 inh. and more	
family-friendly	18%	17%	20%	16%	22%	n.s.
inspiring	17%	16%	16%	19%	19%	n.s.
natural	20%	18%	19%	20%	24%	n.s.
opportunity to experience wine culture	14%	10%	13%	15%	20%	sig.
rural / scenic	21%	19%	20%	21%	24%	n.s.

* Level of significance min. 0.05 (abbreviations: sig. = significant / n.s. = not significant, for further information see glossary)

DESTINATION BRAND 22

Source: inspektour (international) GmbH, 2022

5.2 Supply: Supported evaluation of characteristics – *Sociodemographic differentiation*

Supported evaluation of characteristics of the general characteristics

> Just as people have certain character traits, tourist destinations can also be described using certain characteristics. Please indicate to what extent the following characteristics are applicable to the following <u>international</u> tourist destination?

> Top-two-box on a scale from "5 = completely applicable" to "1 = not at all applicable" (in % of respondents)

■ *Région de Navarre*

Source market: France
Sociodemography: NUTS1 regions
Base: All respondents
Number of respondents: 1,000

General characteristics	total	Regional origin differentiated by NUTS1 regions									Significance* (Kruskal-Wallis-test)
		R I	R II**	R III**	R IV**	R V	R VI**	R VII	R VIII	R IX	
attractive	18%	23%	11%	13%	18%	15%	14%	22%	16%	20%	n.s.
authentic / genuine	21%	27%	13%	13%	17%	20%	17%	27%	20%	24%	n.s.
hospitable	18%	20%	9%	13%	17%	19%	17%	25%	13%	23%	n.s.
offering a lot of variety	17%	21%	10%	12%	15%	17%	14%	22%	14%	23%	n.s.
sustainable	13%	14%	7%	9%	14%	11%	13%	13%	15%	18%	n.s.

Overview of NUTS1 regions

R 1:	Paris Region
R 2:	Western Paris Basin
R 3:	Eastern Paris Basin
R 4:	North
R 5:	West
R 6:	East
R 7:	South-West
R 8:	South-East
R 9:	Mediterranean region

DESTINATION BRAND 22

* Level of significance min. 0.05 (abbreviations: sig. = significant / n.s. = not significant, for further information see glossary)

Source: inspektour (international) GmbH, 2022

** Sample size < 100: Higher statistical uncertainty due to relatively small sample size.

Destination Brand 22 | The profile characteristics of tourist destinations   **NUTS1 regions**   86

5.2 Supply: Supported evaluation of characteristics – *Sociodemographic differentiation*

Supported evaluation of characteristics of the specific characteristics

> *Just as people have certain character traits, tourist destinations can also be described using certain characteristics. Please indicate to what extent the following characteristics are applicable to the following <u>international</u> tourist destination?*

> *Top-two-box on a scale from "5 = completely applicable" to "1 = not at all applicable" (in % of respondents)*

■ *Région de Navarre*

Source market: France
Sociodemography: NUTS1 regions
Base: All respondents
Number of respondents: 1,000

Specific characteristics	total	Regional origin differentiated by NUTS1 regions									Significance* (Kruskal-Wallis-test)
		R I	R II**	R III**	R IV**	R V	R VI**	R VII	R VIII	R IX	
family-friendly	18%	21%	12%	13%	21%	17%	18%	24%	15%	22%	n.s.
inspiring	17%	23%	10%	13%	17%	15%	13%	22%	15%	22%	n.s.
natural	20%	23%	13%	13%	17%	20%	17%	26%	18%	26%	n.s.
opportunity to experience wine culture	14%	18%	10%	9%	9%	13%	13%	13%	13%	18%	n.s.
rural / scenic	21%	27%	13%	13%	18%	17%	15%	26%	20%	26%	n.s.

Overview of NUTS1 regions

R 1:	*Paris Region*
R 2:	*Western Paris Basin*
R 3:	*Eastern Paris Basin*
R 4:	*North*
R 5:	*West*
R 6:	*East*
R 7:	*South-West*
R 8:	*South-East*
R 9:	*Mediterranean region*

DESTINATION BRAND 22

* Level of significance min. 0.05 (abbreviations: sig. = significant / n.s. = not significant, for further information see glossary)

Source: inspektour (international) GmbH, 2022

** Sample size < 100: Higher statistical uncertainty due to relatively small sample size.

Outline

1 GENERAL OVERVIEW OF THE STUDY SERIES DESTINATION BRAND

2 DESIGN OF THE PROFILE STUDY DESTINATION BRAND 22

3 OVERVIEW OF KEY RESULTS: THREE-DIMENSIONAL COMPETITOR ANALYSIS

4 DEMAND: GENERAL RELEVANCE PER PROFILE CHARACTERISTIC IN DETAIL

5 SUPPLY: SUPPORTED EVALUATION OF PROFILE CHARACTERISTICS IN DETAIL

   5.1 Results of univariate analysis

   5.2 Sociodemographic differentiation

   5.3 Standard target group analysis

6 COMPETITION: COMPARISON WITH COMPETITORS PER PROFILE CHARACTERISTIC

7 CONTACT AND PROJECT PARTNERS

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5.3 Supply: Supported evaluation of characteristics – *Standard target group analysis*
Target group definitions – destination Région de Navarre

"Interested in nature"	■ General (i.e., regardless of a specific tourist destination) interest in the touristic holiday activity **"Enjoying nature"** (top-two-box on a scale from "5 = very interested" to "1 = not at all interested")
"Interested in sustainable trips"	■ General (i.e., regardless of a specific tourist destination) interest in the touristic holiday activity **"Undertaking a sustainable holiday trip (nature preserving / environmentally friendly, economically and socially fair)"** (top-two-box on a scale from "5 = very interested" to "1 = not at all interested")
"Families with children"	■ Households with at least one child younger than 14 years living in the household
"Interested in cycling"	■ General (i.e., regardless of a specific tourist destination) interest in the touristic holiday activity **"Cycling (not mountain biking)"** (top-two-box on a scale from "5 = very interested" to "1 = not at all interested")
"Interested in castles / gardens"	■ General (i.e., regardless of a specific tourist destination) interest in the touristic holiday activity **"Visiting castles, mansions, parks and gardens"** (top-two-box on a scale from "5 = very interested" to "1 = not at all interested")
"Interested in film locations"	■ General (i.e., regardless of a specific tourist destination) interest in the touristic holiday activity **"Visiting film locations"** (top-two-box on a scale from "5 = very interested" to "1 = not at all interested")

5.3 Supply: Supported evaluation of characteristics – *Standard target group analysis Overview test of significance**

Examined characteristics **Région de Navarre (N = 1,000)**	Interested in nature	Interested in sustainable trips	Families with children	Interested in cycling	Interested in castles / gardens	Interested in film locations
attractive	significant	significant	not significant	significant	not significant	not significant
authentic / genuine	significant	significant	not significant	not significant	not significant	not significant
hospitable	significant	significant	not significant	significant	significant	significant
offering a lot of variety	not significant	significant	not significant	significant	significant	significant
sustainable	not significant	significant	not significant	not significant	not significant	significant
family-friendly	not significant	significant	not significant	significant	not significant	significant
inspiring	significant	significant	not significant	not significant	significant	significant
natural	significant	significant	not significant	significant	significant	not significant
opportunity to experience wine culture	not significant	significant	not significant	significant	not significant	significant
rural / scenic	significant	significant	not significant	not significant	significant	not significant

* Applied test method: Kruskal-Wallis-Test; level of significance min. 0.05 (for further information see glossary)

Source: inspektour (international) GmbH, 2022

5.3 Supply: Supported evaluation of characteristics – *Standard target group analysis*

Supported evaluation of the characteristic: "attractive"

> *Just as people have certain character traits, tourist destinations can also be described using certain characteristics. Please indicate to what extent the following characteristics are applicable to the following underlined international tourist destination?*

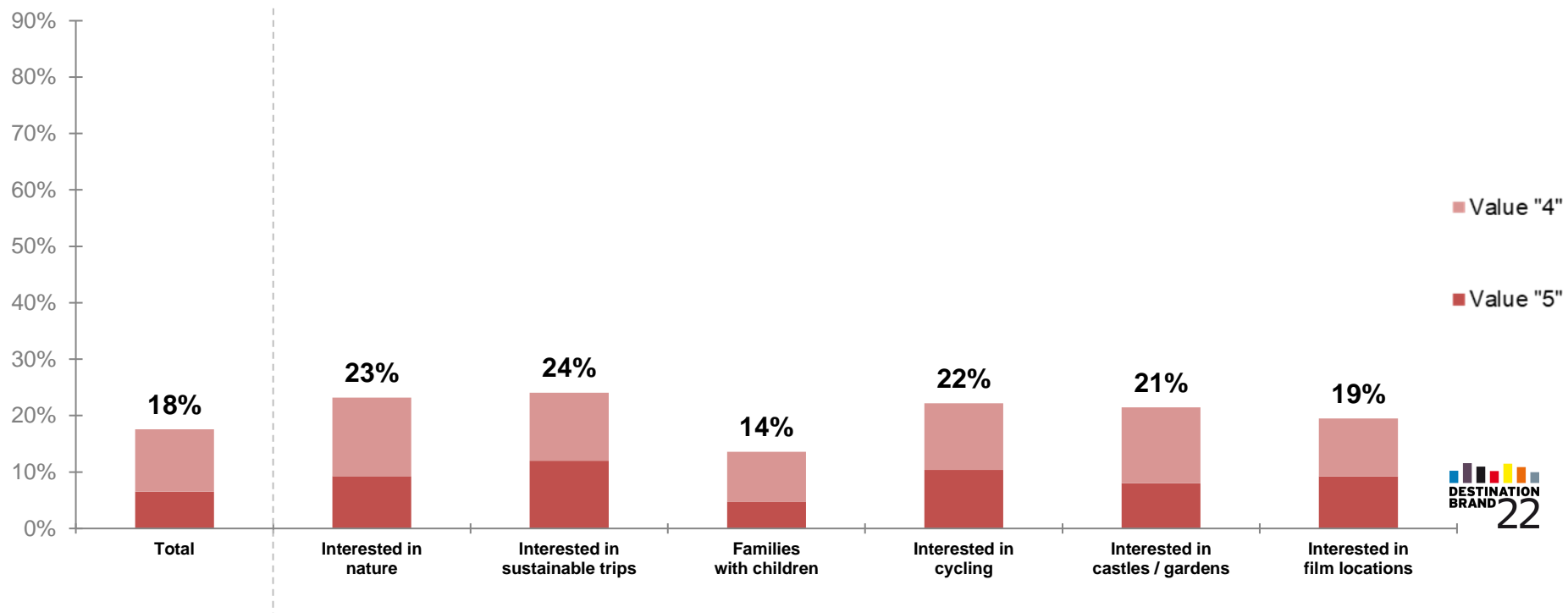> *Top-two-box on a scale from "5 = completely applicable" to "1 = not at all applicable" (in % of respondents)*

■ *Région de Navarre*

Source market: France
Segmentation: Target groups
Base: All respondents
Number of respondents: 1,000

Legend:
- ■ Value "4"
- ■ Value "5"

Bar values:
- Total: 18%
- Interested in nature: 23%
- Interested in sustainable trips: 24%
- Families with children: 14%
- Interested in cycling: 22%
- Interested in castles / gardens: 21%
- Interested in film locations: 19%

DESTINATION BRAND 22

Source: inspektour (international) GmbH, 2022

5.3 Supply: Supported evaluation of characteristics – *Standard target group analysis*

Supported evaluation of the characteristic: "authentic / genuine"

> *Just as people have certain character traits, tourist destinations can also be described using certain characteristics. Please indicate to what extent the following characteristics are applicable to the following <u>international</u> tourist destination?*

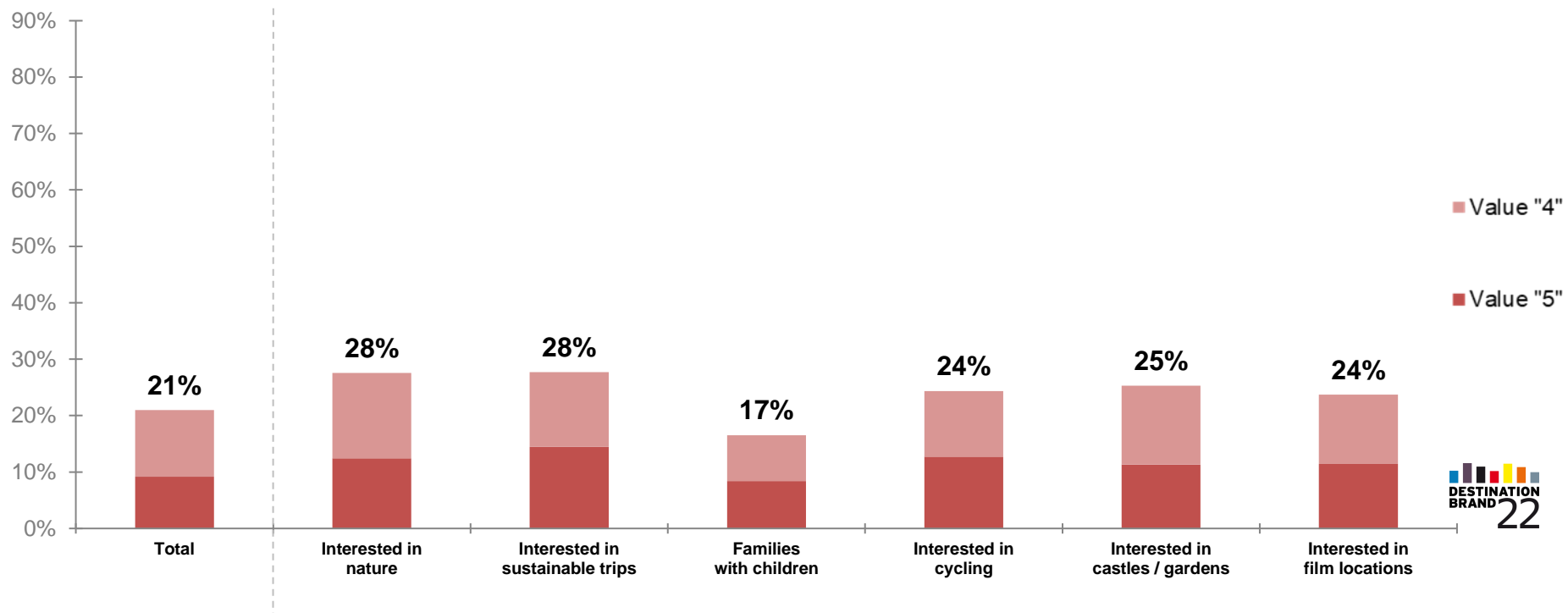> *Top-two-box on a scale from "5 = completely applicable" to "1 = not at all applicable" (in % of respondents)*

■ *Région de Navarre*

Source market: France
Segmentation: Target groups
Base: All respondents
Number of respondents: 1,000

Legend:
■ Value "4"
■ Value "5"

	Total	Interested in nature	Interested in sustainable trips	Families with children	Interested in cycling	Interested in castles / gardens	Interested in film locations
Value	21%	28%	28%	17%	24%	25%	24%

DESTINATION BRAND 22

5.3 Supply: Supported evaluation of characteristics – *Standard target group analysis*

Supported evaluation of the characteristic: "hospitable"

> *Just as people have certain character traits, tourist destinations can also be described using certain characteristics. Please indicate to what extent the following characteristics are applicable to the following <u>international</u> tourist destination?*

> *Top-two-box on a scale from "5 = completely applicable" to "1 = not at all applicable" (in % of respondents)*
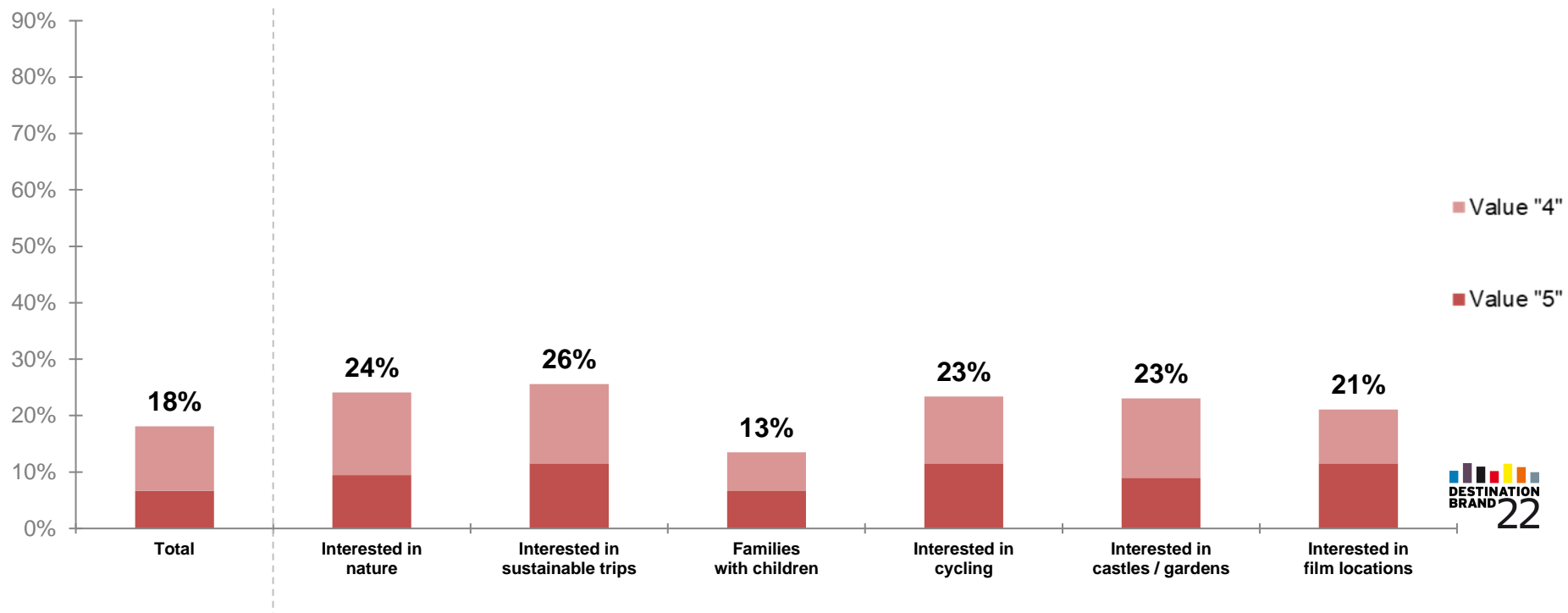
■ *Région de Navarre*

Source market: France
Segmentation: Target groups
Base: All respondents
Number of respondents: 1,000

■ Value "4"

■ Value "5"

Total	Interested in nature	Interested in sustainable trips	Families with children	Interested in cycling	Interested in castles / gardens	Interested in film locations
18%	24%	26%	13%	23%	23%	21%

DESTINATION BRAND 22

Source: inspektour (international) GmbH, 2022

5.3 Supply: Supported evaluation of characteristics – *Standard target group analysis*

Supported evaluation of the characteristic: "offering a lot of variety"

> *Just as people have certain character traits, tourist destinations can also be described using certain characteristics. Please indicate to what extent the following characteristics are applicable to the following <u>international</u> tourist destination?*

> *Top-two-box on a scale from "5 = completely applicable" to "1 = not at all applicable" (in % of respondents)*
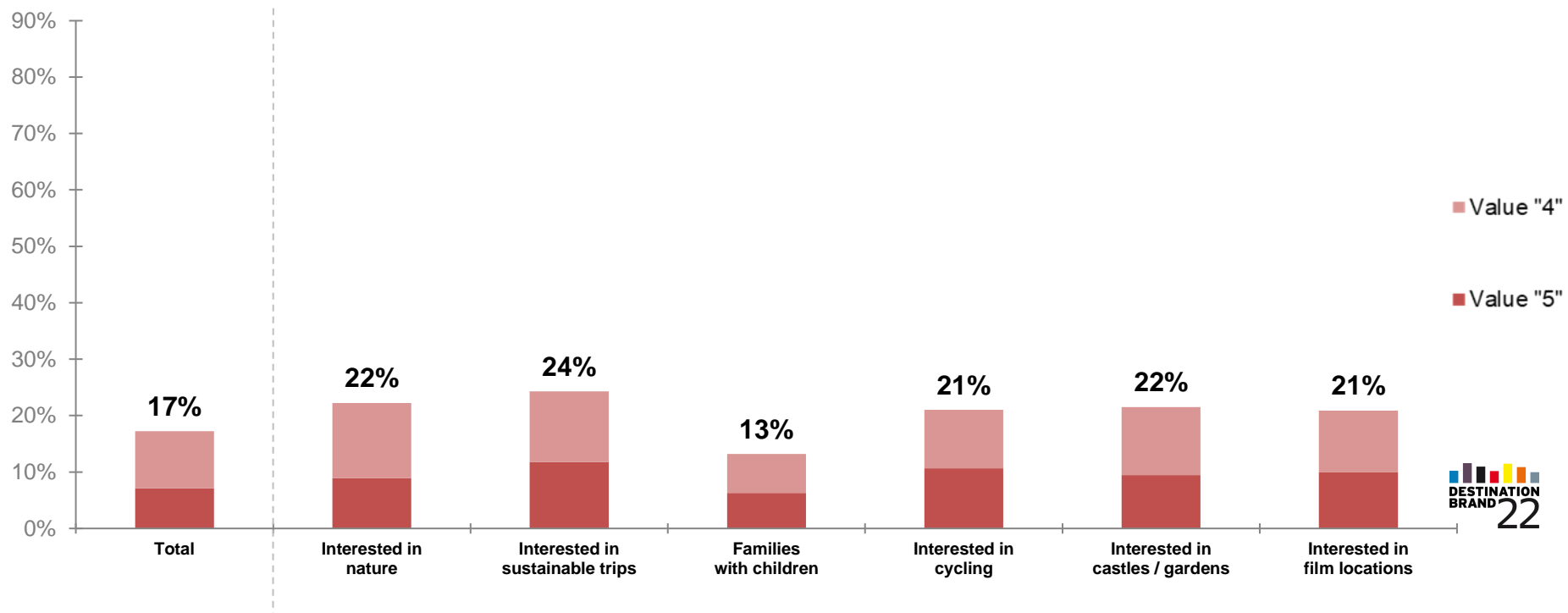
■ *Région de Navarre*

Source market: France
Segmentation: Target groups
Base: All respondents
Number of respondents: 1,000

■ Value "4"

■ Value "5"

	Total	Interested in nature	Interested in sustainable trips	Families with children	Interested in cycling	Interested in castles / gardens	Interested in film locations
Top-two-box	17%	22%	24%	13%	21%	22%	21%

DESTINATION BRAND 22

Source: inspektour (international) GmbH, 2022

5.3 Supply: Supported evaluation of characteristics – *Standard target group analysis*

Supported evaluation of the characteristic: "sustainable"

> Just as people have certain character traits, tourist destinations can also be described using certain characteristics. Please indicate to what extent the following characteristics are applicable to the following <u>international</u> tourist destination?

> Top-two-box on a scale from "5 = completely applicable" to "1 = not at all applicable" (in % of respondents)
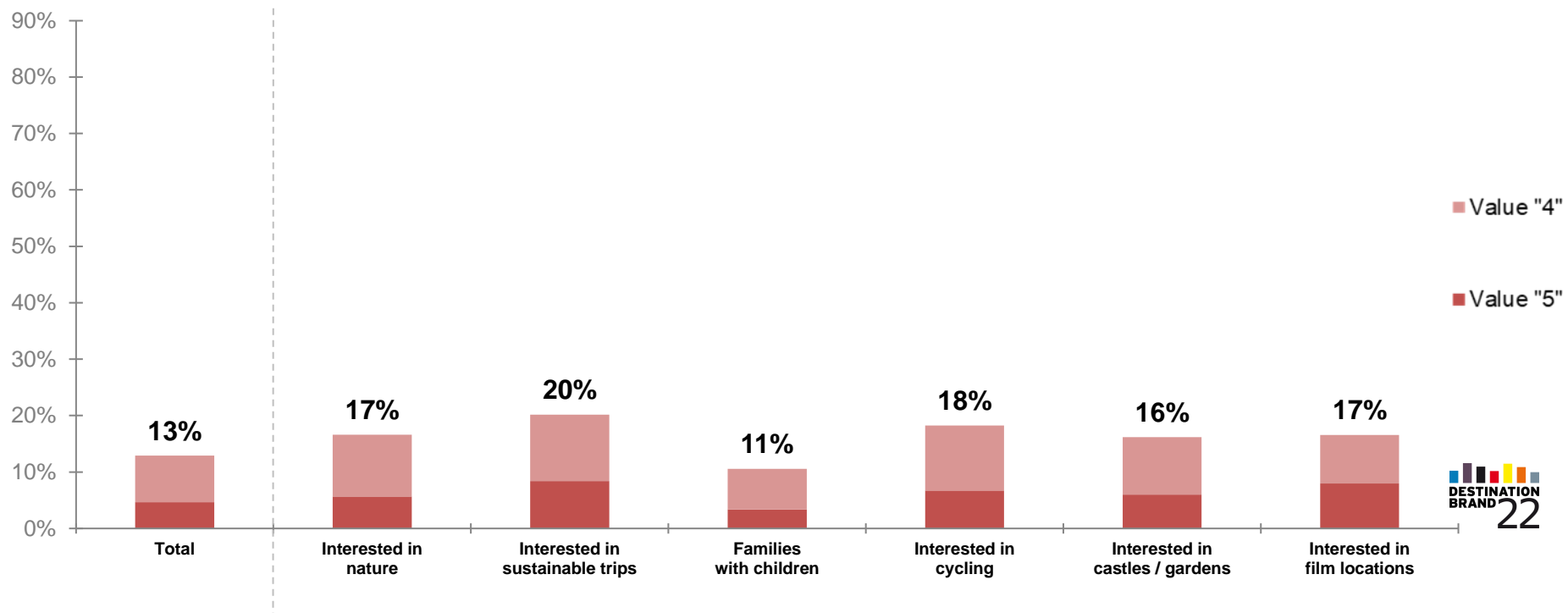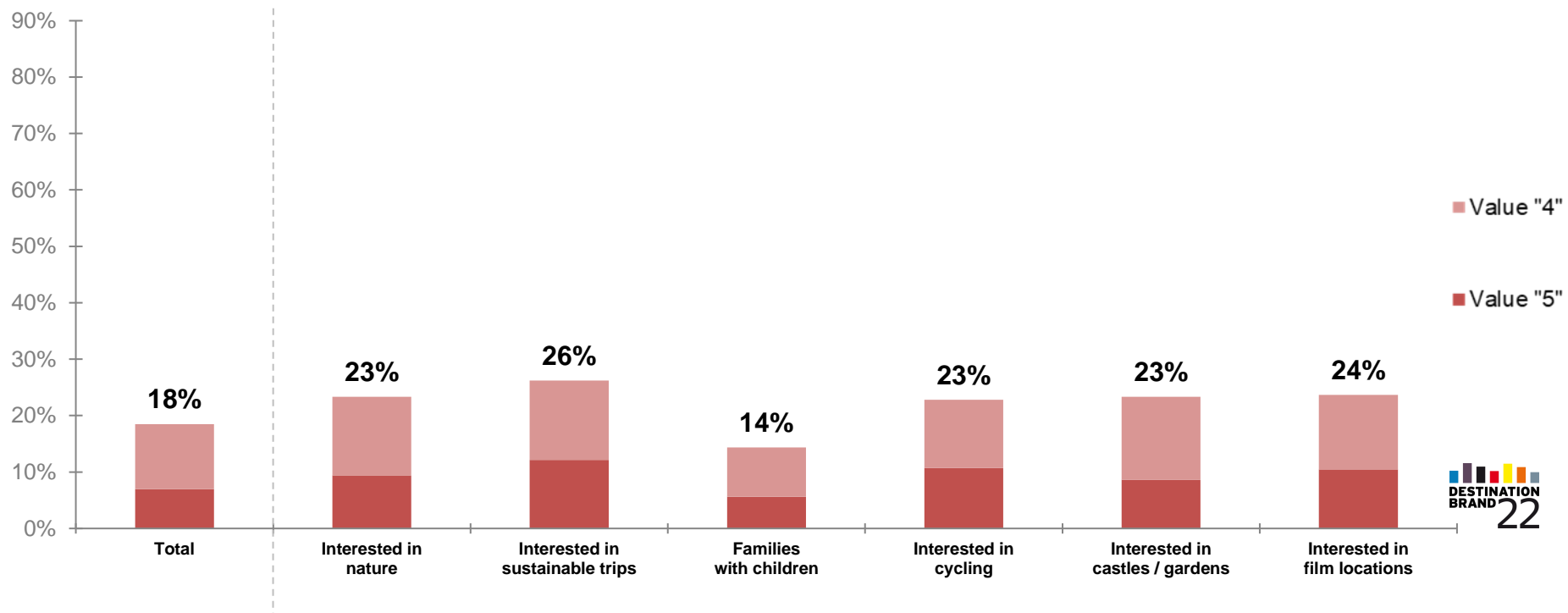
■ *Région de Navarre*

Source market: France
Segmentation: Target groups
Base: All respondents
Number of respondents: 1,000

Legend:
- ■ Value "4"
- ■ Value "5"

Total	Interested in nature	Interested in sustainable trips	Families with children	Interested in cycling	Interested in castles / gardens	Interested in film locations
13%	17%	20%	11%	18%	16%	17%

Source: inspektour (international) GmbH, 2022

5.3 Supply: Supported evaluation of characteristics – *Standard target group analysis*

Supported evaluation of the characteristic: "family-friendly"

> *Just as people have certain character traits, tourist destinations can also be described using certain characteristics. Please indicate to what extent the following characteristics are applicable to the following <u>international</u> tourist destination?*

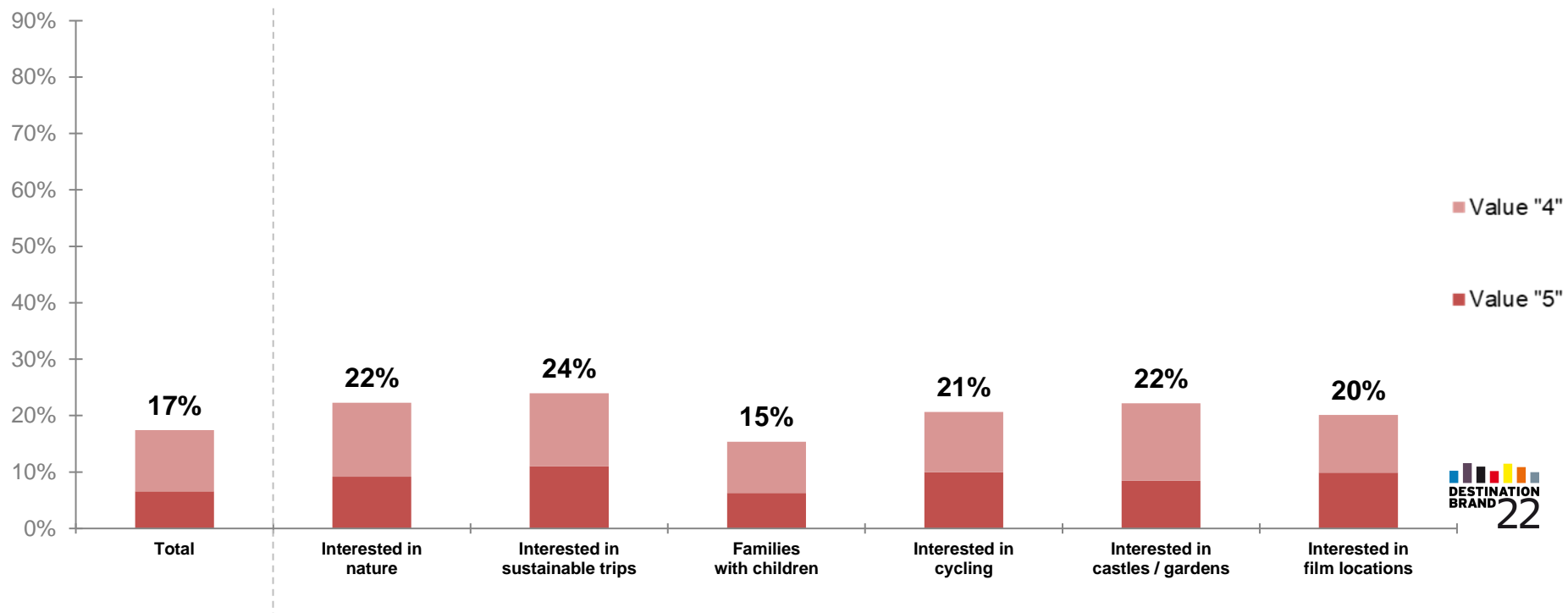> *Top-two-box on a scale from "5 = completely applicable" to "1 = not at all applicable" (in % of respondents)*

■ *Région de Navarre*

Source market: France
Segmentation: Target groups
Base: All respondents
Number of respondents: 1,000

Legend:
■ Value "4"
■ Value "5"

Chart values:
- Total: 18%
- Interested in nature: 23%
- Interested in sustainable trips: 26%
- Families with children: 14%
- Interested in cycling: 23%
- Interested in castles / gardens: 23%
- Interested in film locations: 24%

Source: inspektour (international) GmbH, 2022

5.3 Supply: Supported evaluation of characteristics – *Standard target group analysis*

Supported evaluation of the characteristic: "inspiring"

> *Just as people have certain character traits, tourist destinations can also be described using certain characteristics. Please indicate to what extent the following characteristics are applicable to the following* <u>*international*</u> *tourist destination?*

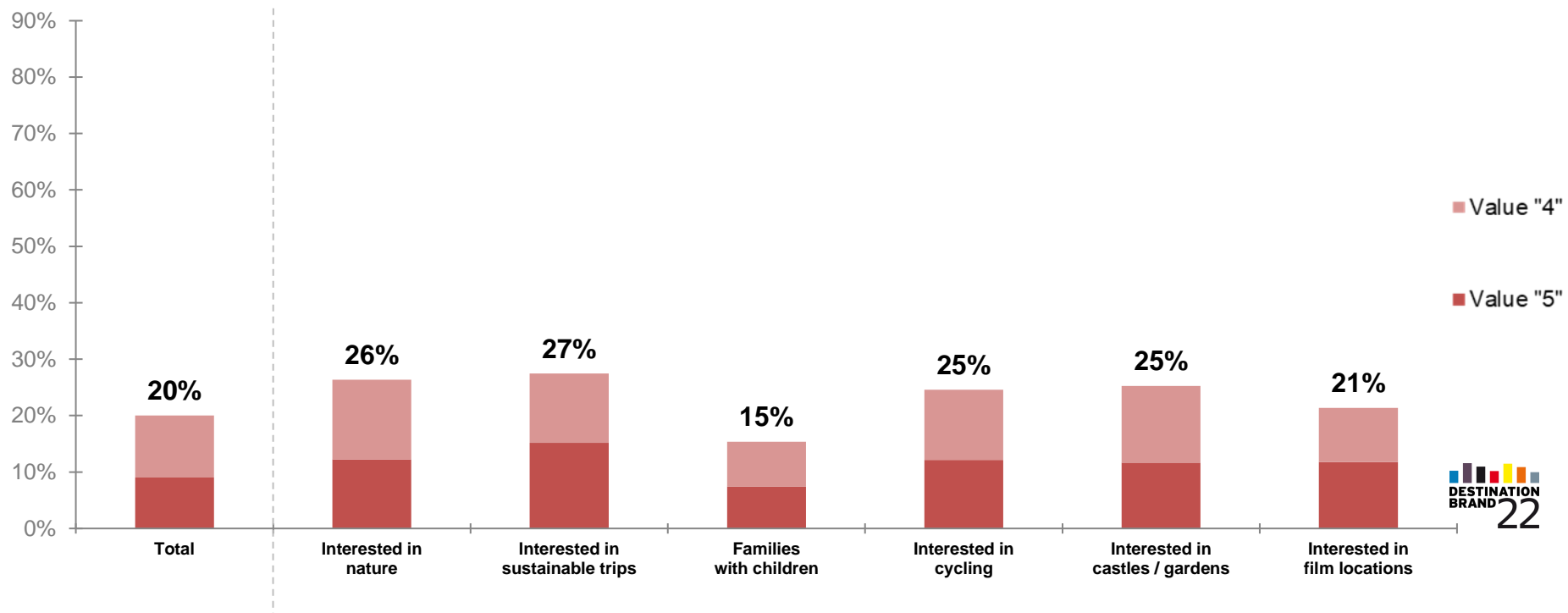> *Top-two-box on a scale from "5 = completely applicable" to "1 = not at all applicable" (in % of respondents)*

■ *Région de Navarre*

Source market: France
Segmentation: Target groups
Base: All respondents
Number of respondents: 1,000

Value "4"

Value "5"

	Total	Interested in nature	Interested in sustainable trips	Families with children	Interested in cycling	Interested in castles / gardens	Interested in film locations
	17%	22%	24%	15%	21%	22%	20%

DESTINATION BRAND 22

Source: inspektour (international) GmbH, 2022

5.3 Supply: Supported evaluation of characteristics – *Standard target group analysis*

Supported evaluation of the characteristic: "natural"

> *Just as people have certain character traits, tourist destinations can also be described using certain characteristics. Please indicate to what extent the following characteristics are applicable to the following underlined international tourist destination?*

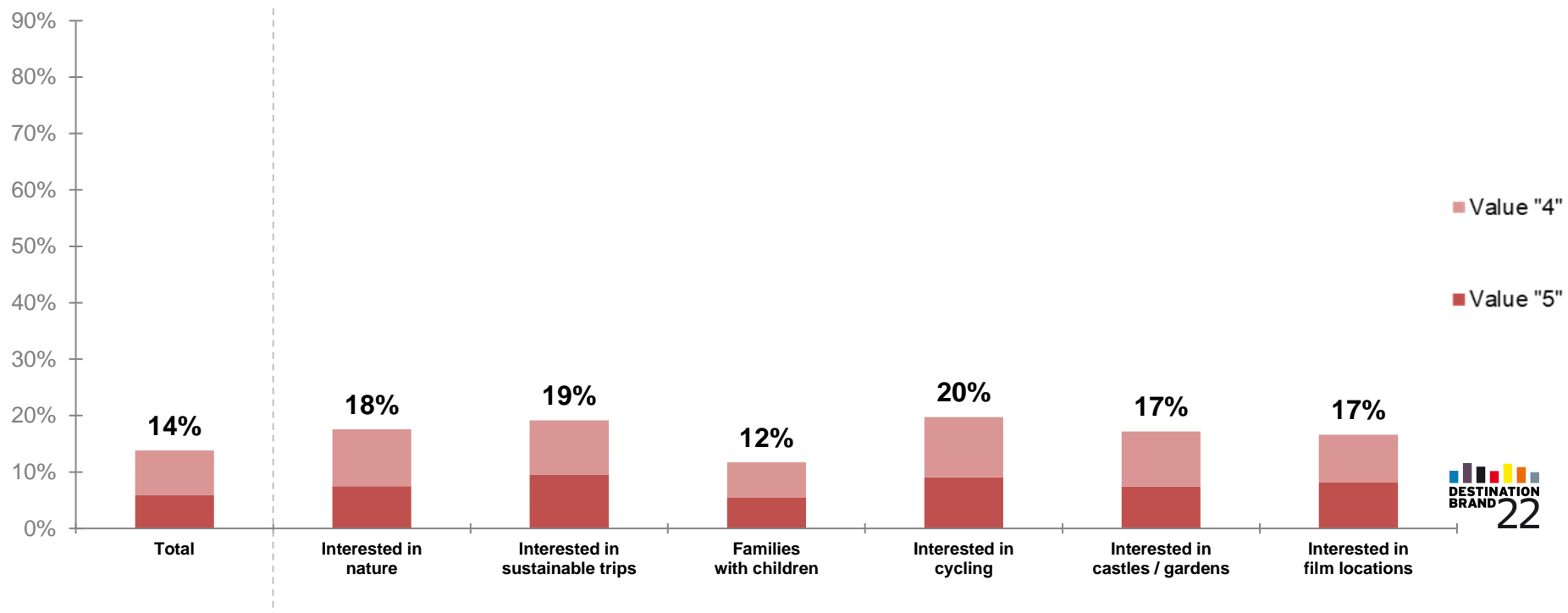> *Top-two-box on a scale from "5 = completely applicable" to "1 = not at all applicable" (in % of respondents)*

■ *Région de Navarre*

Source market: France
Segmentation: Target groups
Base: All respondents
Number of respondents: 1,000

Legend: ■ Value "4"   ■ Value "5"

Chart data (Top-two-box):
- Total: 20%
- Interested in nature: 26%
- Interested in sustainable trips: 27%
- Families with children: 15%
- Interested in cycling: 25%
- Interested in castles / gardens: 25%
- Interested in film locations: 21%

Source: inspektour (international) GmbH, 2022

5.3 Supply: Supported evaluation of characteristics – *Standard target group analysis*

Supported evaluation of the characteristic: "opportunity to experience wine culture"

> Just as people have certain character traits, tourist destinations can also be described using certain characteristics. Please indicate to what extent the following characteristics are applicable to the following <u>international</u> *tourist destination?*

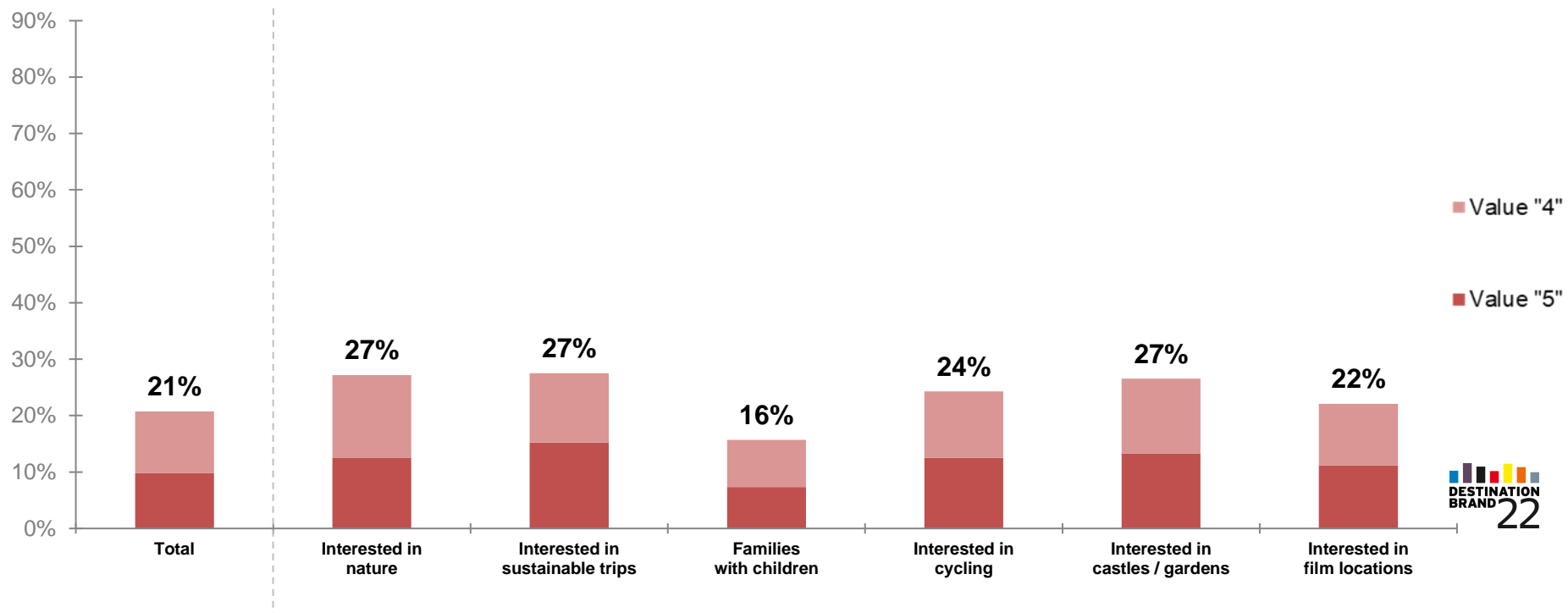*> Top-two-box on a scale from "5 = completely applicable" to "1 = not at all applicable" (in % of respondents)*

■ *Région de Navarre*

Source market: France
Segmentation: Target groups
Base: All respondents
Number of respondents: 1,000

Legend: ■ Value "4"   ■ Value "5"

	Total	Interested in nature	Interested in sustainable trips	Families with children	Interested in cycling	Interested in castles / gardens	Interested in film locations
Top-two-box	14%	18%	19%	12%	20%	17%	17%

DESTINATION BRAND 22

Source: inspektour (international) GmbH, 2022

5.3 Supply: Supported evaluation of characteristics – *Standard target group analysis*

Supported evaluation of the characteristic: "rural / scenic"

> Just as people have certain character traits, tourist destinations can also be described using certain characteristics. Please indicate to what extent the following characteristics are applicable to the following <u>international</u> tourist destination?

> Top-two-box on a scale from "5 = completely applicable" to "1 = not at all applicable" (in % of respondents)

■ *Région de Navarre*

Source market: France
Segmentation: Target groups
Base: All respondents
Number of respondents: 1,000

Chart legend: ■ Value "4", ■ Value "5"

Category	Value
Total	21%
Interested in nature	27%
Interested in sustainable trips	27%
Families with children	16%
Interested in cycling	24%
Interested in castles / gardens	27%
Interested in film locations	22%

DESTINATION BRAND 22

Source: inspektour (international) GmbH, 2022

Outline

1 GENERAL OVERVIEW OF THE STUDY SERIES DESTINATION BRAND
2 DESIGN OF THE PROFILE STUDY DESTINATION BRAND 22
3 OVERVIEW OF KEY RESULTS: THREE-DIMENSIONAL COMPETITOR ANALYSIS
4 DEMAND: GENERAL RELEVANCE PER PROFILE CHARACTERISTIC IN DETAIL
5 SUPPLY: SUPPORTED EVALUATION OF PROFILE CHARACTERISTICS IN DETAIL
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6. Supported evaluation of characteristics – *Competitor analysis: All considered destinations*

	"attractive" Source market: France *Top-two-box on a scale from "5 = completely applicable" to "1 = not at all applicable" (in % of respondents)* *Base: All respondents* Ranking in category: **All considered destinations (*mean = 24%*)**	
Rank	**Queried designation of tourist destination; English translation in brackets**	**%-value**
1	Berlin (Berlin)	
2	Allemagne (Germany)	
3	Monaco (Monaco)	
4	Luxembourg (Luxembourg)	
5	Flandre (Flanders)	
6	**Région de Navarre (Navarre)**	*18%*
7	Leipzig (Leipzig)	
8	Sarre (Saarland)	
9	Rhénanie-Palatinat (Rhineland-Palatinate)	
10	Dresden (Dresden)	

► **Note:** Last survey taken into consideration in October / November 2022

Source: inspektour (international) GmbH, 2022

6. Supported evaluation of characteristics – *Competitor analysis: All considered destinations*

	"authentic / genuine" Source market: France Top-two-box on a scale from "5 = completely applicable" to "1 = not at all applicable" (in % of respondents) Base: All respondents Ranking in category: All considered destinations (*mean = 25%*)	
Rank	**Queried designation of tourist destination; English translation in brackets**	**%-value**
1	Allemagne (Germany)	
2	Berlin (Berlin)	
3	Luxembourg (Luxembourg)	
4	Flandre (Flanders)	
5	Monaco (Monaco)	
6	**Région de Navarre (Navarre)**	*21%*
7	Leipzig (Leipzig)	
8	Sarre (Saarland)	
9	Rhénanie-Palatinat (Rhineland-Palatinate)	
10	Dresden (Dresden)	

► **Note:** Last survey taken into consideration in October / November 2022

6. Supported evaluation of characteristics – *Competitor analysis: All considered destinations*

	"hospitable" Source market: France *Top-two-box on a scale from "5 = completely applicable" to "1 = not at all applicable" (in % of respondents)* *Base: All respondents* Ranking in category: All considered destinations (*mean = 24%*)	
Rank	**Queried designation of tourist destination; English translation in brackets**	**%-value**
1	Allemagne (Germany)	
2	Berlin (Berlin)	
3	Luxembourg (Luxembourg)	
4	Monaco (Monaco)	
5	Flandre (Flanders)	
6	**Région de Navarre (Navarre)**	*18%*
7	Leipzig (Leipzig)	
8	Sarre (Saarland)	
9	Rhénanie-Palatinat (Rhineland-Palatinate)	
10	Dresden (Dresden)	

► **Note:** Last survey taken into consideration in October / November 2022

Source: inspektour (international) GmbH, 2022

6. Supported evaluation of characteristics – *Competitor analysis: All considered destinations*

	"offering a lot of variety" **Source market: France** *Top-two-box on a scale from "5 = completely applicable" to "1 = not at all applicable" (in % of respondents)* *Base: All respondents* **Ranking in category: All considered destinations (*mean = 24%*)**	
Rank	**Queried designation of tourist destination; English translation in brackets**	**%-value**
1	Allemagne (Germany)	
2	Berlin (Berlin)	
3	Monaco (Monaco)	
4	Luxembourg (Luxembourg)	
5	Flandre (Flanders)	
6	**Région de Navarre (Navarre)**	*17%*
7	Leipzig (Leipzig)	
8	Rhénanie-Palatinat (Rhineland-Palatinate)	
9	Sarre (Saarland)	
10	Dresden (Dresden)	

► **Note:** Last survey taken into consideration in October / November 2022

Source: inspektour (international) GmbH, 2022

6. Supported evaluation of characteristics – *Competitor analysis: All considered destinations*

	"sustainable" **Source market: France** *Top-two-box on a scale from "5 = completely applicable" to "1 = not at all applicable" (in % of respondents)* *Base: All respondents* **Ranking in category: All considered destinations (*mean = 19%*)**	
Rank	**Queried designation of tourist destination; English translation in brackets**	**%-value**
1	Allemagne (Germany)	
2	Berlin (Berlin)	
3	Luxembourg (Luxembourg)	
4	Monaco (Monaco)	
5	Flandre (Flanders)	
6	**Région de Navarre (Navarre)**	*13%*
7	Leipzig (Leipzig)	
8	Sarre (Saarland)	
9	Rhénanie-Palatinat (Rhineland-Palatinate)	
10	Dresden (Dresden)	

► **Note:** Last survey taken into consideration in October / November 2022

Source: inspektour (international) GmbH, 2022

6. Supported evaluation of characteristics – *Competitor analysis: All considered destinations*

	"family-friendly" Source market: France *Top-two-box on a scale from "5 = completely applicable" to "1 = not at all applicable" (in % of respondents)* *Base: All respondents* Ranking in category: All considered destinations (*mean = 16%*)		
Rank	**Queried designation of tourist destination; English translation in brackets**		**%-value**
1	Berlin (Berlin)		
2	**Région de Navarre (Navarre)**		*18%*
3	Leipzig (Leipzig)		
4	Sarre (Saarland)		
5	Rhénanie-Palatinat (Rhineland-Palatinate)		
6	Dresden (Dresden)		

► **Note:** Last survey taken into consideration in October / November 2022

Source: inspektour (international) GmbH, 2022

6. Supported evaluation of characteristics – *Competitor analysis: All considered destinations*

	"opportunity to experience wine culture"	
DESTINATION BRAND 22	**Source market: France** *Top-two-box on a scale from "5 = completely applicable" to "1 = not at all applicable" (in % of respondents)* *Base: All respondents* **Ranking in category: All considered destinations (*mean = 9%*)**	
Rank	**Queried designation of tourist destination; English translation in brackets**	**%-value**
1	**Région de Navarre (Navarre)**	*14%*
2	Leipzig (Leipzig)	
3	Dresden (Dresden)	

► **Note:** Last survey taken into consideration in October / November 2022

Outline

7.1 inspektour (international) GmbH – *Tourism and market research*

The study series Destination Brand is carried out under the project leadership of inspektour. Our goal is to realise a practise-oriented, holistic expansion and further development of the study series.

As a private-sector consultancy for practise-oriented development and concepts in leisure tourism as well as in regional development, we have set ourselves the goal of providing local authorities, institutions or companies with advice. We are taking on challenges with our partners and constantly work towards breaking new ground in the creation of innovative and future-oriented solutions.

Since 2001, we have been researching, analysing and designing content and providing support in the implementation of partial or overall concepts, particularly in the fields of destination and leisure management, market research, nature and environmental management as well as city and regional marketing and management. inspektour has successfully supervised and carried out hundreds of projects across Germany and increasingly operates on an international level. Since 2009, we have been certified in accordance with Service-Quality Germany.

In addition to a great deal of empathy and commitment, inspektour's work is characterised by a high level of practical orientation and an implementation approach as well as the involvement of all relevant stakeholders in achieving a generally accepted project result.

The 17 permanent employees of inspektour have a broad scientific background – among others Dipl. Economics (FH), Dipl. Geography, Dipl. Engineering, Dipl. Culture Management, Dipl. Tourism Management, Dipl. Traffic Science, Master's in Eco-tourism (M.Sc.), Master's in International Tourism Management (MA), Master's in Sports Tourism and Recreation Management (M.Sc.) – and make the provision of a well-founded examination of different themes possible. A long-standing and intensive scientific and operational exchange with the FH Westküste (University of Applied Sciences) and the German Institute for Tourism Research in Heide (Holstein) is fostered through joint projects and lectures.

► **www.inspektour.de**
► **www.destination-brand.de**

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7.2 German Institute for Tourism Research of the FH Westküste

Applied, empirical tourism research as a task

The German Institute for Tourism Research was founded on June 12, 2020 as an In-Institute at the West Coast University of Applied Sciences. However, the roots of the new institute go back much further. It emerged from the Institute for Management and Tourism (IMT), which since its founding in 2006 – measured by the number of employees – developed into the largest In-Institute in tourism at a German university and thus became a "lighthouse" for the research and study location Heide (Holst.). The rededication to the German Institute for Tourism Research in 2020 took this significance and the many years of experience into account.

In its following and interconnected core areas, the German Institute for Tourism Research is Germany's first contact for applied, empirical tourism research:

1. **Travel behavior**
   Consideration of travel as well as its preparation and follow-up under political, economic, social, ecological and technical influences with a focus on people as well as tourism demand
2. **Effects of travel on society, ecology and economy**
   Consideration of the social, environmental as well as economic effects resulting from travel demand. In addition to aspects such as tourism acceptance or value chains, the effects of travel behavior on the environment and the necessary derivations are also examined.
3. **Strategic development options in destinations and institutions**
   Supporting tourism management in strategic decision-making through insights from travel behavior and the effects of tourism demand

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► **www.ditf-fhw.de**

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7.3 Ipsos GmbH

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Outline

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3 OVERVIEW OF KEY RESULTS: THREE-DIMENSIONAL COMPETITOR ANALYSIS

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IMPRINT

8.1 Reading examples – *Demand: General relevance*

General relevance for destination selection of the general characteristics

> *Just as people have certain character traits, tourist destinations can also be described using certain characteristics. How relevant are the following characteristics when you <u>choose a tourist destination</u> for a holiday trip with at least one overnight stay <u>in general</u> (i.e., regardless of a specific tourist destination)?*
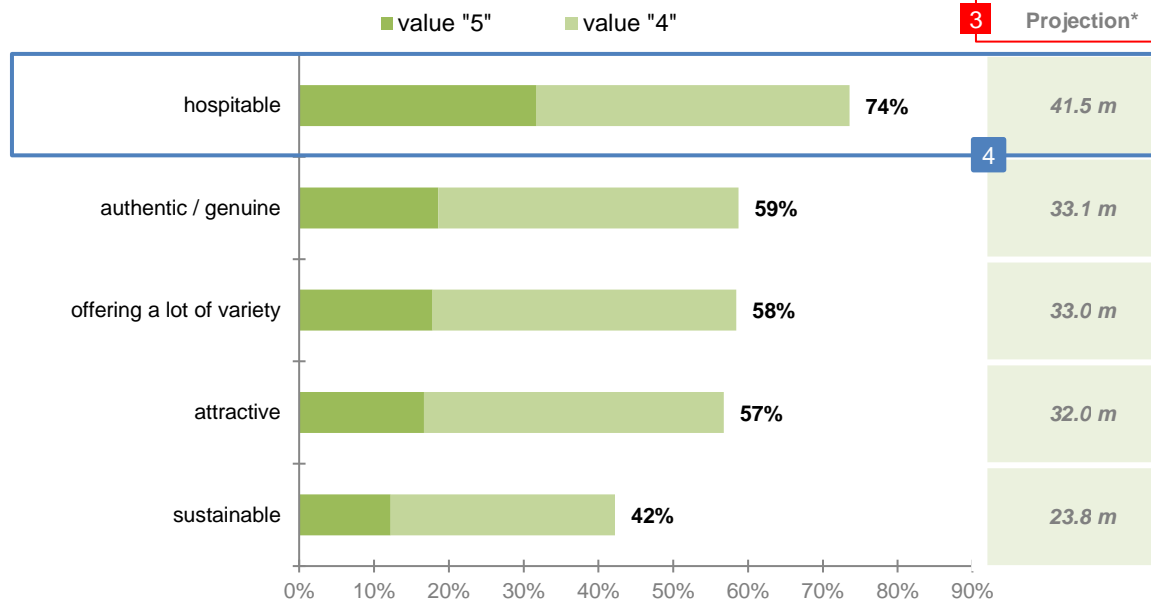
1 > *Top-two-box on a scale from "5 = very relevant" to "1 = not at all relevant" (in % of respondents)*

■ *General characteristics*

Source market: Source market XY
Base: All respondents
Number of respondents: 17,000 **2**

■ value "5" ■ value "4"   **3** Projection*

Characteristic	Top-two-box	Projection*
hospitable	**74%**	*41.5 m*
authentic / genuine	**59%**	*33.1 m*
offering a lot of variety	**58%**	*33.0 m*
attractive	**57%**	*32.0 m*
sustainable	**42%**	*23.8 m*

4

0% 10% 20% 30% 40% 50% 60% 70% 80% 90%

3 * Projection of the absolute volume of the general relevance (number of people).

1

*Values are expressed as **top-two-box values**, i.e., the percentage refers to all respondents that answered with "5 = very relevant" or value "4" for the respective characteristic.*

2

*In this example, **all respondents** are taken into consideration. In the study Destination Brand 22, a total of 1,000 to 15,000 people were surveyed online per source market about the general (i.e., regardless of a specific tourist destination) relevance of the respective characteristics when choosing a tourist destination.*

3

*The **projection** refers to the population represented in the study (usually 14-74 years), which totals the following volume per source market:*

DE = 61.81 m people; AT = 6.59 m people; CH = 6.02 m people; NL = 12.78 m people; FR = 46.61 m people; IT = 45.51 m people; ES = 34.30 m people; UK = 47.95 m people; US = 246.50 m people.

<u>Central question</u>: How high is the **general (i.e., regardless of a specific destination) relevance of the respective characteristics** (here the general characteristics) for the represented population when choosing a tourist destination? – Reading example **"hospitable"**

4
► *For 74% of the represented population, the characteristic "hospitable" is generally (i.e., regardless of a specific destination) relevant when choosing a tourist destination for a holiday trip with at least one overnight stay.*

► *This corresponds to a total of 41.5 m people aged 14-74 living in private households (see column on the right).*

Source: inspektour (international) GmbH, 2022 (visualisation example with fictional values)

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TOURISM AND MARKET RESEARCH

Supported evaluation of the general characteristics

> *Just as people have certain character traits, tourist destinations can also be described using certain characteristics. Please indicate to what extent the following characteristics are applicable to the following international tourist destination?*
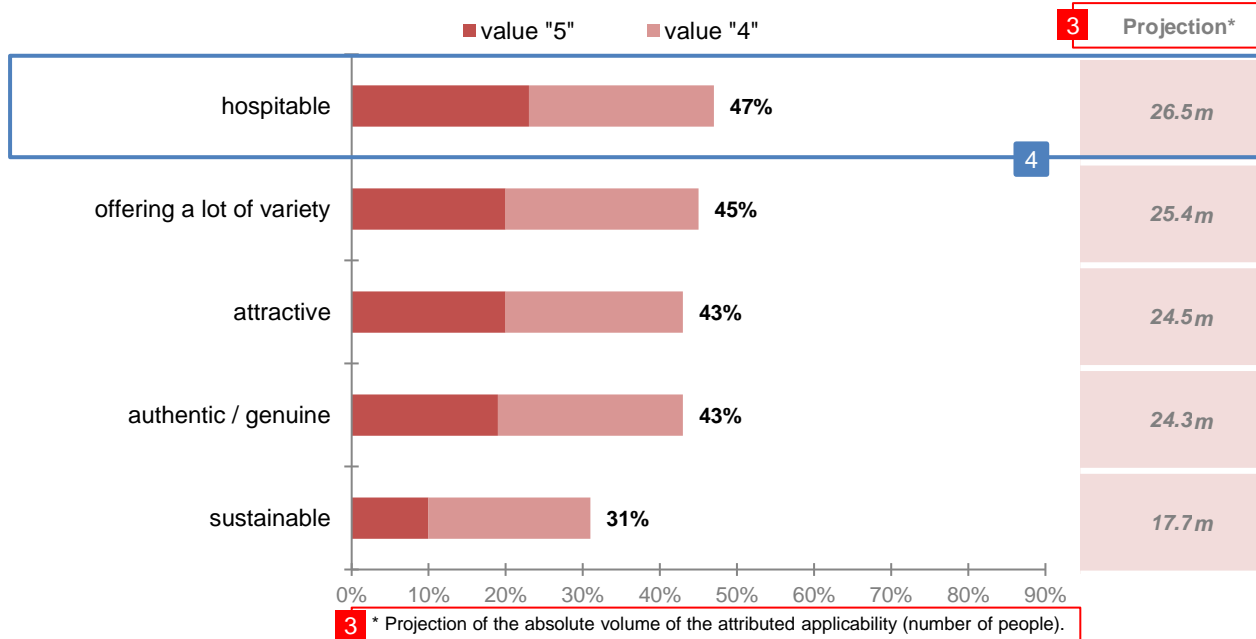
1 > *Top-two-box on a scale from "5 = completely applicable" to "1 = not at all applicable" (in % of respondents)*

■ *Destination XY*

Source market: Source market XY
Base: All respondents
Number of respondents: 1,000 **2**

■ value "5" ■ value "4"   **3** Projection*

Characteristic	Top-two-box	Projection*
hospitable	**47%**	*26.5 m*
offering a lot of variety	**45%**	*25.4 m*
attractive	**43%**	*24.5 m*
authentic / genuine	**43%**	*24.3 m*
sustainable	**31%**	*17.7 m*

0% 10% 20% 30% 40% 50% 60% 70% 80% 90%

4

3 * Projection of the absolute volume of the attributed applicability (number of people).

1
*Values are expressed as **top-two-box values**, i.e., the percentage refers to all respondents that answered the question with "5 = completely applicable" or the value "4".*

2
*In this example, **all respondents** are considered for the supported evaluation of characteristics. In total, 24,000 people were surveyed online in the study Destination Brand 22. Various representative sub-samples were used to achieve a sample size of 1,000 per tourist destination.*

3
*The **projection** refers to the population represented in the study (usually 14-74 years), which totals the following volume per source market:*
DE = 61.81 m people; AT = 6.59 m people; CH = 6.02 m people; NL = 12.78 m people; FR = 46.61 m people; IT = 45.51 m people; ES = 34.30 m people; UK = 47.95 m people; US = 246.50 m people.

Central question: *To what extent are the **considered characteristics applicable to Destination XY** (here the five pre-defined general characteristics)? – Reading example "hospitable"*

4 ► *47% of the represented population rate Destination XY as "hospitable" (see top-two-box).*
► *This corresponds to a total of 26.5 m people aged 14-74 living in private households (see column on the right).*

Source: inspektour (international) GmbH, 2022 (visualisation example with fictional values)

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TOURISM AND MARKET RESEARCH

Supported evaluation of the general characteristics

> *Just as people have certain character traits, tourist destinations can also be described using certain characteristics. Please indicate to what extent the following characteristics are applicable to the following <u>international</u> tourist destination?*

[1]
> *Top-two-box on a scale from "5 = completely applicable" to "1 = not at all applicable" (in % of respondents)*

■ *Destination XY*

Source market: Source market XY
Base: All respondents
Number of respondents: 1,000 [2]
Number base by subgroups: varying

Chart legend:
- All respondents
- Distinct intention to travel abroad
- Affine to the characteristic
- Visitors in the past

[3] Projection*

	All respondents	Distinct intention to travel abroad	Affine to the characteristic	Visitors in the past
hospitable (47% / 49% / 51% / 85%)	26.5 m	13.8 m	21.1 m	8.8 m
offering a lot of variety (45% / 50% / 55% / 81%)	25.4 m	14.1 m	17.7 m	8.4 m
attractive (43% / 46% / 50% / 79%)	24.5 m	13.0 m	16.0 m	8.1 m
authentic / genuine (43% / 47% / 52% / 77%)	24.3 m	13.3 m	16.5 m	7.9 m
sustainable (31% / 37% / 42% / 66%)	17.7 m	10.4 m	9.3 m	5.9 m

[3] * Projection of the absolute volume of the attributed applicability (number of people).

[1]
*Values are expressed as **top-two-box values**, i.e., the percentage refers to all respondents that answered the question with "5 = completely applicable" or the value "4".*

[2]
*The **supported evaluation of characteristics** is calculated based on the subgroups **"distinct intention to travel abroad"** (respondents who definitely intend to spend a short trip and / or a longer holiday trip abroad within the next 3 years), **"affine to the characteristic"** (respondents for whom the respective characteristic is generally relevant when choosing a tourist destination for a holiday trip with at least one overnight stay) as well as **"visitors in the past"** (respondents who have already holidayed in the tourist destination with at least one overnight stay).*

[3]
*The **projection** refers to the population represented in the study (usually 14-74 years), which totals the following volume per source market:*
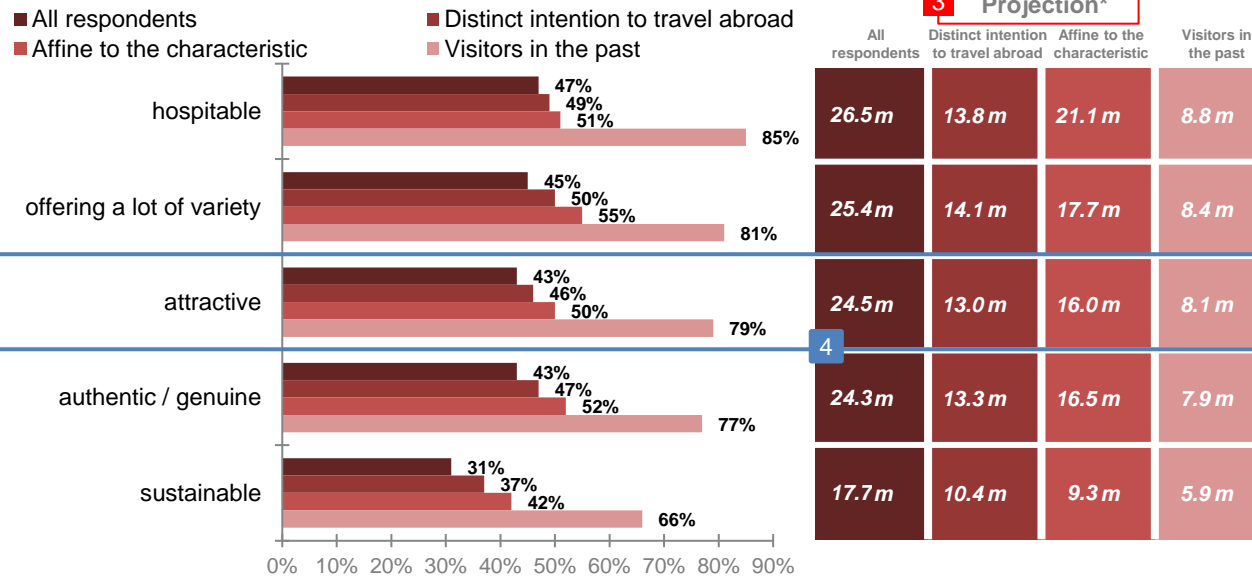*DE = 61.81 m people; AT = 6.59 m people; CH = 6.02 m people; NL = 12.78 m people; FR = 46.61 m people; IT = 45.51 m people; ES = 34.30 m people; UK = 47.95 m people; US = 246.50 m people.*

[4]
<u>*Central question*</u>*: To what extent are the **considered characteristics applicable to Destination XY from the perspective of the different subgroups** (here the five pre-defined general characteristics)? — Reading example **"attractive"***

► *43% of the represented population rate Destination XY as "attractive" (see the dark red bar at the top).*

► *In comparison to the overall represented population, the subgroups "distinct intention to travel abroad" (46%) and "affine to the characteristic" (50%) attribute a higher attractivity to Destination XY (see the two red bars in the middle).*

► *Moreover, Destination XY receives the highest attractivity rating by the subgroup "visitors in the past" (79%, see the light red bar below).*

► *In addition, the table on the right hand side displays the projection of the absolute volume of the attributed applicability for each subgroup.*

Source: inspektour (international) GmbH, 2022 (visualisation example with fictional values)

DESTINATION BRAND 22

8.1 Reading examples – *Competition: Comparison with competitors*

DESTINATION BRAND 22	Source market: XY		Category: All considered destinations [1]							
Destination XY (N = 1,000)	**Number of destinations in category**	**Base: All respondents [2]**					**Base: Affine to the characteristic**			
		own value		**mean**	**rank**		**own value**		**mean**	**rank**
		in %	**projection***				**in %**	**projection***		
offering a lot of variety	[3] [6]	45%	25.4 m	27%	12.		55%	17.7 m	32%	11.
attractive		43%	24.5 m	29%	27.		50%	16.0 m	35%	33.
authentic / genuine	170	43%	24.3 m	32%	32.		52%	16.5 m	39%	36.
hospitable		47%	26.5 m	31%	18.		51%	21.1 m	36%	26.
sustainable		31%	17.7 m	23%	22.		42%	9.3 m	32%	26.

(column markers: [4] under "in %", [5] under "mean")

* Projection of the absolute volume of the attributed applicability (number of people).

► **Note:** Last survey taken into consideration in October / November 2022

[6] **Central question:** How does Destination XY perform in **comparison with competitors regarding the supported evaluation of characteristics** in the category **"all considered destinations"?** – Reading example **"attractive"**

► 43% of the representative population rate destination XY as "attractive" (see column "own value in %"). Compared to the average of all surveyed destinations of 29% (see column "mean"), Destination XY positions itself clearly above average and ranks 27th out of 170 (see column "rank") in the category "all considered destinations" (see left part of the table, base "all respondents").

► The right part of the table additionally displays the results based on the subgroup "affine to the characteristic". Even though Destination XY receives a higher evaluation (50%) for the profile characteristic "attractive" by the respondents with affinity to the characteristic (see column "own value in %"), the achieved rank (33rd out of 170; see column "rank") is a bit lower.

[1] The results for the supported evaluation of characteristics can be compared based on **different categories of competitors**. In this example, the results refer to the category **"all considered destinations"**.

[2] This overview is based on **"all respondents"** and **"respondents with affinity to the characteristic"**.

[3] In this example, a total of **170 tourist destinations** were investigated. In the case of the specific characteristics, the **number of considered destinations varies**, which needs to be taken into account in the interpretation of the results.

[4] The rankings are based on the **top-two-box values** of the considered tourist destinations in the respective category. Only the values of Destination XY are displayed here (column own value).

[5] The **average of the category** is calculated as the **arithmetic mean** of the top-two-box values of all destinations included in this category.

Source: inspektour (international) GmbH, 2022 (visualisation example with fictional values)

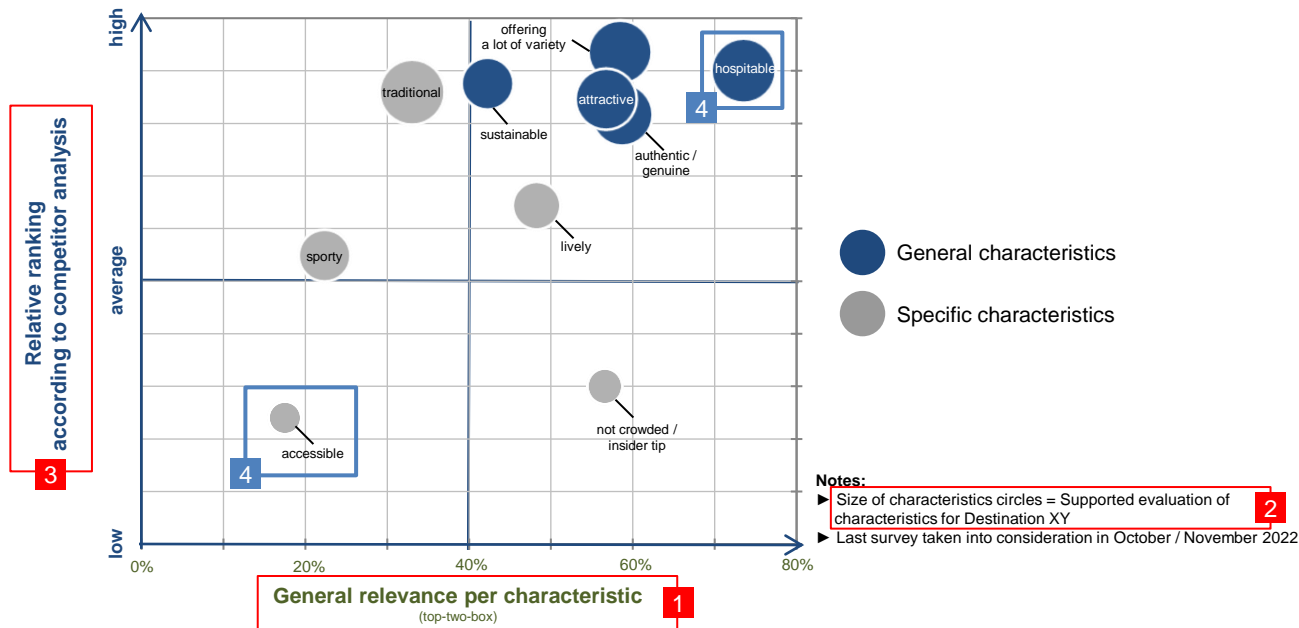## Quadrant analysis Destination XY

> Category for relative ranking according to competitor analysis:
> All considered destinations (up to 170 tourist destinations per characteristic)

■ *Destination XY*

Source market: Source market XY
Base: All respondents
Number of respondents: 1,000

Relative ranking according to competitor analysis (y-axis: low / average / high)

General relevance per characteristic (x-axis: 0% – 80%)
(top-two-box)

● General characteristics

● Specific characteristics

Characteristics shown: offering a lot of variety, traditional, sustainable, attractive, authentic / genuine, hospitable, lively, sporty, not crowded / insider tip, accessible

Notes:
▶ Size of characteristics circles = Supported evaluation of characteristics for Destination XY
▶ Last survey taken into consideration in October / November 2022

1

"Demand": The **general relevance** per characteristic is expressed by the position of the circle on the X-axis (horizontal). The greater the relevance of the respective characteristic among the represented population when choosing a tourist destination, the further to the right the characteristic is placed on the axis.

2

"Supply": The supported evaluation of characteristics of Destination XY is represented by the size of the respective "characteristic circles". The larger the "characteristic circle", the more the respective characteristic is rated as applicable to the Destination XY.

3

"Competition": The **relative ranking** in the competitor analysis of Destination XY in the category "all considered destinations per characteristic" is illustrated by the position of the respective characteristic on the Y-axis (vertical). The better Destination XY performs in the competitive comparison, the higher the respective characteristic is placed in the quadrant.

Central question: How can the **key results of the three-dimensional competitor analysis** on the evaluation of characteristics of Destination XY be summarised? – Reading example **"hospitable" & "accessible"**

▶ The attribute "hospitable" is characterised by a very high general relevance for destination selection (see position far to the right on the X-axis). Furthermore, the characteristic "hospitable" is evaluated as highly applicable to Destination XY (see large "characteristic circle"), which leads to a ranking clearly above-average of Destination XY in the comparison of competitors (see position in the upper area on the Y-axis).

▶ In contrast, the general relevance for destination selection of the characteristic "accessible" is significantly lower (see position in the left area on the X-axis). Furthermore, Destination XY only receives a low rating for this attribute (see small "characteristic circle") and thus achieves a ranking clearly below-average in the comparison of competitors (see position in the lower area of the Y-axis).

Source: inspektour (international) GmbH, 2022 (visualisation example with fictional values)

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TOURISM AND MARKET RESEARCH

Supported evaluation of the general characteristics

> *Just as people have certain character traits, tourist destinations can also be described using certain characteristics. Please indicate to what extent the following characteristics are applicable to the following international tourist destination?*

1 > *Top-two-box on a scale from "5 = completely applicable" to "1 = not at all applicable" (in % of respondents)*

■ *Destination XY*

Source market: Source market XY
Sociodemography: Age group **2**
Base: All respondents
Number of respondents: 1,000

General characteristics	total	Age group						Significance* (Kruskal-Wallis-test)
		14-24 y.	25-34 y.	35-44 y.	45-54 y.	55-64 y.	65-74 y.	
attractive	43%	27%	30%	42%	45%	46%	54%	sig.
authentic / genuine	43%	25%	29%	43%	45%	47%	57%	sig.
hospitable	47%	40%	44%	47%	51%	53%	55%	n.s.
offering a lot of variety	45%	37%	44%	47%	49%	50%	52%	sig.
sustainable	31%	20%	22%	27%	30%	35%	45%	sig.

* Level of significance min. 0.05 (abbreviations: sig. = significant / n.s. = not significant, for further information see glossary). **4**

1
*Values are expressed as **top-two-box values**, i.e., the percentage refers to all respondents that answered the question with "5 = completely applicable" or the value "4".*

2
*In addition to the univariate evaluation results, several **bivariate analyses** are part of the report. Among others, the attributed applicability achieved is differentiated according to **eight sociodemographic criteria**. This example depicts the criterion "age group".*

3
*In case of the criterion "age group", the approval rates can be differentiated by **six age cohorts**.*
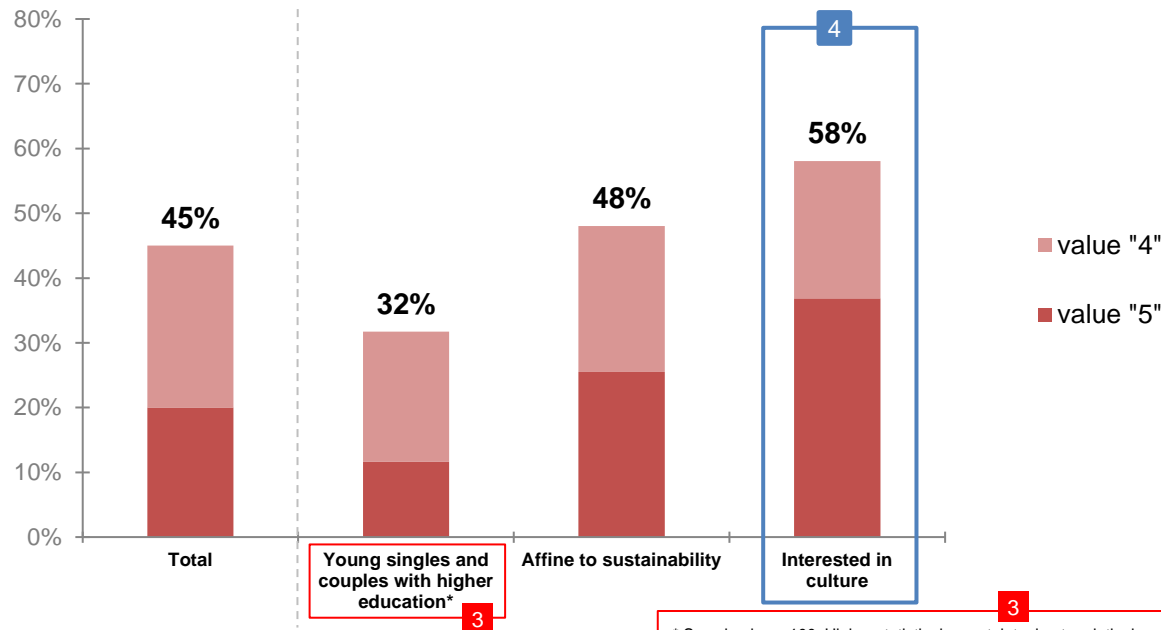
4
*If the results of the bivariate analyses are **significant**, the observed differences between the different categories (here "age groups") are **statistically secured** and can **be applied to the overall population** with a confidence probability of at least 95%. If the results are not significant, the confidence probability is below 95%.*

5
Central question: *What are the **differences between age groups** with regard to the evaluation of characteristics of Destination XY? – Reading example: "attractive"*

► *The results by age group are among others significant in the case of the characteristic "attractive" (see column "Significance"). Subsequently, the results can be applied to the general population.*

► *While the applicability rating by the "14-24 year-olds" (27%) and the "25-34 year-olds" (30%) of the characteristic "attractive" is below average of all respondents (43%), the "65-74 year-olds" (54%) give the highest rating for Destination XY.*

Source: inspektour (international) GmbH, 2022 (visualisation example with fictional values)

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TOURISM AND MARKET RESEARCH

Supported evaluation of the characteristic: "offering a lot of variety"

> *Just as people have certain character traits, tourist destinations can also be described using certain characteristics. Please indicate to what extent the following characteristics are applicable to the following international tourist destination?*

1
> *Top-two-box on a scale from "5 = completely applicable" to "1 = not at all applicable" (in % of respondents)*

■ *Destination XY*

Source market: Source market XY
Segmentation: Target groups **2**
Base: All respondents
Number of respondents: 1,000

4

58%

48%

45%

32%

■ value "4"
■ value "5"

Total

Young singles and couples with higher education* **3**

Affine to sustainability

Interested in culture

3
* Sample size < 100: Higher statistical uncertainty due to relatively small sample size.

1
*Values are expressed as **top-two-box values**, i.e., the percentage refers to all respondents that answered the question with "5 = completely applicable" or the value "4".*

2
*In addition to the univariate evaluation results, several bivariate analyses are part of the report. Among others, the evaluation of the profile characteristics can be differentiated by **individually selected target groups**. In the case of the standard target group analysis, the target groups can be defined based on sociodemographic criteria, the general interest in various holiday activities and/or the general relevance of various profile characteristics for destination selection. Concerning the source market Germany, additional comprehensive options of the target group analysis comprise a differentiation by the **"Sinus Milieus®"** by the SINUS-institute as well as the **"BeST types of holiday makers"** by the FH Westküste.*

3
*In the case of the target group "Young singles and couples with higher education", the number of cases is below 100, which means that a **higher level of statistical uncertainty** needs to be taken into consideration.*

4
Central question: Among which **target group** does Destination XY achieve the **highest rating** regarding the characteristic "offering a lot of variety"?

► *In this example the considered target groups are "Young singles and couples with higher education", "Affine to sustainability" and "Interested in culture".*

► *Among the three target groups, the respondents being "Interested in culture" give Destination XY the highest applicability rating regarding the characteristic "offering a lot of variety" (58%). Their approval rate is clearly above the average of all respondents (45%).*

Source: inspektour (international) GmbH, 2022 (visualisation example with fictional values)

Destination Brand 22 | The profile characteristics of tourist destinations
offering a lot of variety
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DESTINATION BRAND 22

Outline

1 GENERAL OVERVIEW OF THE STUDY SERIES DESTINATION BRAND

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IMPRINT

8.2 Glossary – *Content of the profile study*

Content 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 tourist destination for a holiday trip with at least one overnight stay (responses of the top-two-box on a rating scale for the assessment of 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 (responses of the top-two-box on a rating scale for the supported evaluation of characteristics)
Spontaneous associations (module 2)	Share of the represented population that spontaneously (i.e., without being provided answer options) associates certain ideas, attributes respectively characteristics with the tourist destination

Subgroups	
Characteristic-attributors	Respondents who rate the respective characteristic as applicable for the destination in question (measured using the top-two-box value)
Affine to the characteristic	Respondents for whom the respective characteristic is generally relevant when choosing a tourist destination for a holiday trip with at least one overnight stay (measured using the top-two-box value)
Distinct intention to travel abroad	Respondents who definitely (top value) intend to spend a short holiday trip (with 1 – 3 overnight stays) and / or 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)

8.2 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.

Source: inspektour (international) GmbH, 2022 based on Statista GmbH, 2013

8.2 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.

Source: inspektour (international) GmbH, 2022 based on Statista GmbH, 2013

8.2 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.
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	
%, %-p.	Percentage, percentage points
mean	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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8.3 Margin of error

Confidence probability | **95%**

Share in %:	Sample size n=												Sample size 1,000	Confidence interval limits	
	100	200	300	500	1,000	1,500	2,000	3,000	5,000	8,000	9,000	10,000		lower	higher
	Variances												Variances		
5	4.27	3.02	2.47	1.91	1.35	1.10	0.96	0.78	0.60	0.48	0.45	0.43	1.35	3.65	6.35
10	5.88	4.16	3.39	2.63	1.86	1.52	1.31	1.07	0.83	0.66	0.62	0.59	1.86	8.14	11.86
15	7.00	4.95	4.04	3.13	2.21	1.81	1.56	1.28	0.99	0.78	0.74	0.70	2.21	12.79	17.21
20	7.84	5.54	4.53	3.51	2.48	2.02	1.75	1.43	1.11	0.88	0.83	0.78	2.48	17.52	22.48
25	8.49	6.00	4.90	3.80	2.68	2.19	1.90	1.55	1.20	0.95	0.89	0.85	2.68	22.32	27.68
30	8.98	6.35	5.19	4.02	2.84	2.32	2.01	1.64	1.27	1.00	0.95	0.90	2.84	27.16	32.84
35	9.35	6.61	5.40	4.18	2.96	2.41	2.09	1.71	1.32	1.05	0.99	0.93	2.96	32.04	37.96
40	9.60	6.79	5.54	4.29	3.04	2.48	2.15	1.75	1.36	1.07	1.01	0.96	3.04	36.96	43.04
45	9.75	6.89	5.63	4.36	3.08	2.52	2.18	1.78	1.38	1.09	1.03	0.98	3.08	41.92	48.08
50	9.80	6.93	5.66	4.38	3.10	2.53	2.19	1.79	1.39	1.10	1.03	0.98	3.10	46.90	53.10
55	9.75	6.89	5.63	4.36	3.08	2.,52	2.18	1.78	1.38	1.09	1.03	0.98	3.08	51.92	58.08
60	9.60	6.79	5.54	4.29	3.04	2.48	2.15	1.75	1.36	1.07	1.01	0.96	3.04	56.96	63.04
65	9.35	6.61	5.40	4.18	2.96	2.41	2.09	1.71	1.32	1.05	0.99	0.93	2.96	62.04	67.96
70	8.98	6.35	5.19	4.02	2.84	2.32	2.01	1.64	1.27	1.00	0.95	0.90	2.84	67.16	72.84
75	8.49	6.00	4.90	3.80	2.68	2.19	1.90	1.55	1.20	0.95	0.89	0.85	2.68	72.32	77.68
80	7.84	5.54	4.53	3.51	2.48	2.02	1.75	1.43	1.11	0.88	0.83	0.78	2.48	77.52	82.48
85	7.00	4.95	4.04	3.13	2.21	1.81	1.56	1.28	0.99	0.78	0.74	0.70	2.21	82.79	87.21
90	5.88	4.16	3.39	2.63	1.86	1.52	1.31	1.07	0.83	0.66	0.62	0.59	1.86	88.14	91.86
95	4.27	3.02	2.47	1.91	1.35	1.10	0.96	0.78	0.60	0.48	0.45	0.43	1.35	93.65	96.35
Share in %:															
20	7.84	5.54	4.53	3.51	2.48	2.02	1.75	1.43	1.11	0.88	0.83	0.78	2.48	17.52	22.48
lower CI	1.16	14.46	15.47	16.49	17.52	17.98	18.25	18.57	18.89	19.12	19.17	19.22	17.52		
higher CI	27.84	25.54	24.53	23.51	22.48	22.02	21.75	21.43	21.11	20.88	20.83	20.78	22.48		

Source: GfK, 2013

8.3 Margin of error

Explanation

Using the table on the previous chart, it is possible to calculate a (two-sided) confidence interval based on a proportion of a given characteristic obtained from a sample, in which the true value of the unit in the population as a whole is located.

Example: 1,000 people are randomly selected from the registration index of a city. Based on the birthplace of these individuals, it can be stated that 20% were born in another location. Based on this sample, the proportion of the city's population that was born in another place can be estimated. The estimation should be made with the utmost certainty. A margin of error of 5% is agreed upon in this estimation.

The table is divided into a standard gray-and-white area and an orange-and-white case-specific area. In the grey-and-white area, the confidence intervals for variances are calculated for 19 unit values (5%, ..., 95%) and 12 possible sample sizes (n = 100, ..., n = 10,000). These variances are deducted from the estimated value or calculated accordingly to obtain the desired confidence interval.

For the example given above, the table shows a variance of 2.48 with a confidence level of 95%. This means that the true proportion of people born elsewhere, with a probability of 95%, is between 20% -2.48% = 17.52% and 20% + 2.48% = 22.48%.

In the orange-and-white area, the sample size is also highlighted in terms of the analysis of the supported evaluation of profile characteristics to the tourist destination "Région de Navarre" in the source market France of 1,000. The table below specifies the fluctuation intervals for the 19 predefined values that result from the defined confidence level of 95%. In addition, the limits of the confidence interval for the respective unit value are also calculated here.

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8.4 List of literature regarding the general overview of the study series Destination Brand

The given overview in chapter 1 represents an excerpt of the following article (slightly modified):

Eisenstein, B., Koch, A., Trimborn, P. and Müller, S. (2017): Die DestinationBrand-Studienreihe – Basisinformationen zur Markenführung von Destinationen.- In: Eisenstein, B. (ed.) (2017): Marktforschung für Destinationen. Grundlagen – Instrumente – Praxisbeispiele.- Berlin, pp. 267-283.

Notes

[1] See Meffert, Burmann and Kirchgeorg (2015), p. 329; Esch (2014), p. 79; Meffert and Burmann (2013), p. 31; Burmann, Halaszovich and Hemmann (2012), pp. 27.

[2] Brand image is defined here as "ein in der Psyche relevanter externer Zielgruppen fest verankertes, verdichtetes, wertendes Vorstellungsbild" (Burmann, Halaszovich and Hemmann (2012), p. 364).

[3] The term brand is understood here as "ein Nutzenbündel mit spezifischen Merkmalen […], die dafür sorgen, dass sich dieses Nutzenbündel gegenüber anderen Nutzenbündeln, welche dieselben Basisbedürfnisse erfüllen, aus Sicht relevanter Zielgruppen nachhaltig differenziert." (Burmann, Blinda and Nitschke (2003), p. 3 based on Keller (2003), p. 2.)

[4] See Burmann, Meffert and Feddersen (2007), p. 11.

[5] See Burmann, Schade and Müller (2014), p. 282.

[6] See Esch and Möll (2009), p. 30.

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8.4 List of literature regarding the general overview of the study series Destination Brand

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Meffert, H., Burmann, C. and Kirchgeorg, M. (2015): Marketing. Grundlagen marktorientierter Unternehmensführung. Konzepte – Instrumente – Praxisbeispiele. 12th, revised and updated edition, Wiesbaden.

Outline

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