

DESTINATION BRAND 21

THE THEME COMPETENCE OF TOURIST DESTINATIONS

SOURCE MARKET SPAIN

Report for the tourist destination Navarra

► **Note:** Queried designation of Navarre for Spanish respondents = "Navarra"

Customer-oriented study of the theme competence of tourist destinations
total 1,000 respondents | population representative study | 10 individual destinations

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*German Institute for Tourism Research
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Leading University Institute in Tourism in Germany*

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Ipsos GmbH, Hamburg

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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 9.4 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 image² 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 brand³ 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

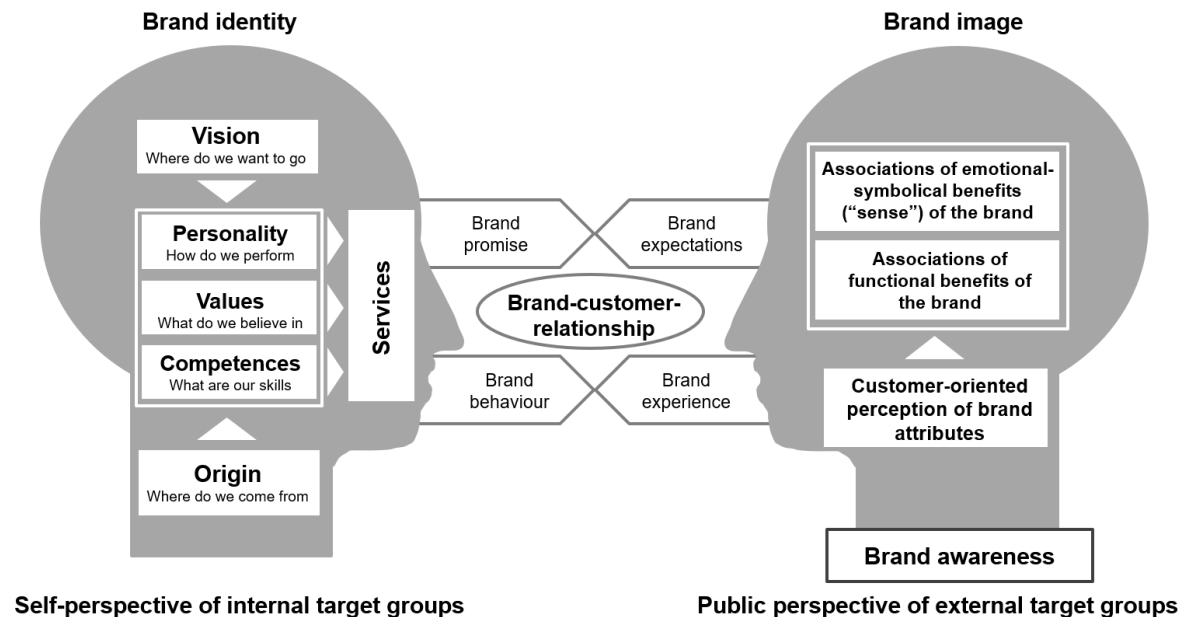
Theoretical starting point:
concept of identity-based
brand management

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 way⁶.








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		<ul style="list-style-type: none"> – Awareness (supported and unsupported) – Likeability – Willingness to visit for future short trips and longer holiday trips within the next 3 years (and DB20: within the next 12 months) – Visits in the past – DB20: Impact of the coronavirus pandemic on the interest to visit – Target group- and competitor analysis 				
Survey design	For all sub-studies	<ul style="list-style-type: none"> – Online survey in respective national language; quota sample (based on cross quota age/sex and regional origin) – Representative of the respective population aged 14-74 years living in private households (basis for projection of absolute volumes) – Comprehensive competitive comparison possibilities based on the relatively large destination pool – Time comparison possibilities based on the consistent study design 				
	Specific per sub-study					
	Source markets	DE	DE	DE	DE AT CH NL	DE AT CH NL CN FR IT ES UK US
	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 two or more source markets; distribution: DE = 45 | AT = 22 | CH = 33 | NL = 33.

** In the study DB20 some destinations were surveyed in two or more 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		<ul style="list-style-type: none"> Customer-oriented evaluation of the theme competence of tourist destinations (\triangleq associations of the functional benefits of the destination brands) 				
Research focus		<ul style="list-style-type: none"> General (i.e., regardless of a specific destination) interest in holiday activities Supported theme suitability per 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	<ul style="list-style-type: none"> Online survey in respective national language; quota sample (based on cross quota age / sex and regional origin) Representative of the respective population aged 14-74 years living in private households (basis for projection of absolute volumes) Comprehensive competitive comparison possibilities based on the relatively large destination pool Time comparison possibilities based on the consistent study design 				
	Specific per sub-study					
	Source markets	DE	DE	DE	DE AT CH NL	DE AT CH NL CN FR IT ES UK US
	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 two or more source markets; distribution: DE = 45 | AT = 22 | CH = 33 | NL = 33.

** In the study DB21 some destinations were surveyed in two or more 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 / image study

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

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

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2.1 Methods of the theme competence study Destination Brand 21

Aim

- Study for the customer-oriented **theme competence measurement** of tourist destinations in the following **source markets**:
 - Germany (DE), Austria (AT), Switzerland (CH), the Netherlands (NL)
 - **NEW:** France (FR), Italy (IT), Spain (ES), the United Kingdom (UK), the USA (US), China (CN)

Key issues

- General (i.e., regardless of a specific destination) **interest in holiday activities** of the respective source market
- **Theme suitability per tourist destination** (supported and top of mind)
- **Target group analysis** among others differentiated by:
 - sociodemographic criteria and the general interest in several holiday activities,
 - the “Sinus Milieus® Germany”* and the “Sinus-Meta-Milieus®”* by the SINUS-institute as well as
 - the “BeST types of holiday makers”* by the West Coast University of Applied Sciences (FH Westküste)



* These options for target group definition exist exclusively for the source market Germany.

2.1 Methods of the theme competence study Destination Brand 21

Survey design

- **194 destinations** (several destinations were surveyed in more than one source market; distribution among source markets: DE = 171 | AT = 30 | CH = 10 | NL = 10 | **NEW:** CN = 10 | FR = 10 | IT = 10 | ES = 10 | UK = 10 | US = 10)
- **Total sample size:** 28.000; per tourist destination: 1,000 (supported theme suitability); distribution among source markets:
DE: 17,000 | AT: 3,000 | 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 = 61.94 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 until December 2021**

2.1 Methods of the theme competence study Destination Brand 21

As already described more in detail in chapter 1, scientifically-founded insights into the evaluation of the own theme suitability 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 21 conducts a **customer-oriented theme competence measurement** for 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 theme competence studies in the years 2010, 2013 and 2016 already covered a comprehensive part of the German domestic tourist destinations, the studies Destination Brand 18 & 19 widened the scope and additionally encompassed the four source markets Austria, Switzerland, the Netherlands and China. On top of the named source markets, **the theme competence study Destination Brand 21 has also been conducted for the first time in France, Italy, Spain, the United Kingdom and the USA.**

In total, **28,000 respondents were surveyed online in their respective national language** in the course of the study Destination Brand 21. The sample sizes per source market are as follows: DE: n = 17,000 | AT: n = 3,000 | 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

Widened scope of
analysed source markets
(FR | IT | ES | UK | US)

Population-representative
online surveys

2.1 Methods of the theme competence study Destination Brand 21

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 interest in holiday activities and the theme suitability of tourist destinations **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 theme competence study makes it possible to conduct a **three-dimensional analysis of the competitive situation** (see the following figure). Thereby, the general interest potential of each holiday activity (1st analysis dimension “demand”; see chapters 4.1 + 5), the assessment of the theme suitability of Navarra (2nd analysis dimension “supply”; see chapters 4.2 + 6) as well as the performance of Navarra compared to the competitors (3rd dimension “competition”; see chapters 4.3 + 7) are comprehensively analysed.

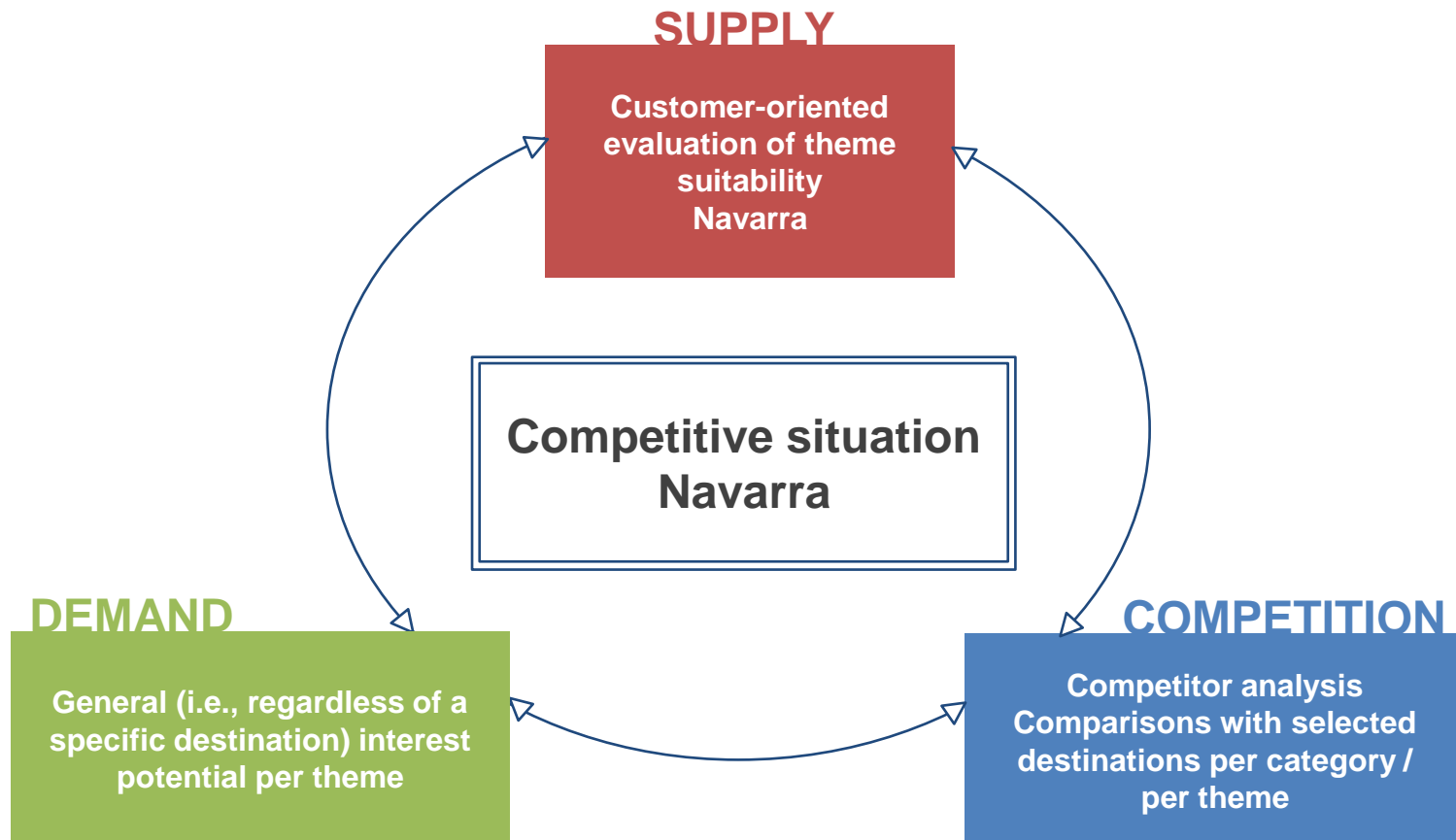
In the following, the key features of the three analysis dimensions will be described briefly.

Representativeness
in the source market China

Three-dimensional analysis
of the competitive situation

2.1 Methods of the theme competence study Destination Brand 21

Three-dimensional analysis of the competitive situation



► **Note:** Queried designation of Navarre for Spanish respondents = “Navarra”

Source: inspektour (international) GmbH, 2021

2.1.1 Analysis dimension 1: Demand

In accordance with the predecessor theme competence studies, the recent edition Destination Brand 21 also centres on the measurement of the **general interest (i.e., regardless of a specific destination)** of the respective represented population in several holiday themes (see chapters 4.1 + 5). The general interest potential is measured on the basis of the proportion of the top-two-box on a scale from “5 = very interested” to “1 = not at all interested”.

In the study Destination Brand 21, the interest potential was surveyed for **46 holiday activities in an uniform manner for all ten source markets**. While 13 additional holiday activities were surveyed in the source market Germany, one additional holiday theme was investigated in each of the two source markets China and Spain (for a detailed overview of the holiday activities taken into account, see chapter 9.2).

Compared to the predecessor studies Destination Brand 16-13-10, there may be limitations in the comparability of designations over time for individual themes. This is due to the **standardisation of all theme designations** as holiday activities (previously also partly designated as holiday types) in the context of the study Destination Brand 18. In the course of this optimisation, the designations were also harmonised in the survey contents of the general interest potential and the supported theme competence of the destinations.

The addition or omission of individual holiday themes arises from the expansion of the study to include international source markets and the relevance of the themes within these source markets. Furthermore, in Destination Brand 21, as in every edition of the theme competence study, some further holiday activities have also found their way into the theme pool of the current study by means of the individual theme selection option for the participating clients in the context of their commissioning.

General
interest potential

46 holiday activities
surveyed in an uniform manner
for all ten source markets

Additional explanation
on the composition
of the considered pool
of holiday activities

2.1.2 Analysis dimension 2: Supply

This second central analysis dimension of Destination Brand 21 focuses on the question, to which extend the represented population considers the respective tourist destination to be **suitable for a set of at least 10 different holiday activities** (regardless of one's own interest in the activities). This set consists of 5 general themes as well as most commonly 5 additional specific themes.

The general themes “culinary / gastronomic specialties”, “visiting cultural institutions / using cultural services”, “enjoying nature”, “being active and involved in sports” and “taking a city break” were uniformly examined for all considered destinations independently of the source market. In the case of the specific themes, 5 up to 10 individually relevant holiday activities could be selected by the responsible authority for the respective destination based on a pre-defined pool of holiday themes.

The **suitability assessment** was carried out by those respondents to whom the respective destination is known – even if only by name (“supported theme suitability”). The awarded theme suitability is measured on the basis of the proportion of the top-two-box on a scale from “5 = very suitable” to “1 = not at all suitable”.

The number of respondents for all considered destinations with regard to the supported theme suitability 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 awarded theme suitability by the following highly relevant sub-groups (see chapter 4.3):

- **“interested in the theme”**: Respondents who are generally interested (i.e., regardless of a specific tourist destination) in the respective holiday activity (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 mentioned first and foremost. 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:
suitability assessment
regarding 10 holiday activities

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 6.3), the assessment of the supported theme suitability is differentiated by up to 6 individually selected target groups, which can be defined based on sociodemographic criteria, the general interest in holiday activities as well as a combination of these aspects.

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
- **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 of the FH Westküste in the year 2020)

For the analysis of the tourist destination Navarra in the source market Spain, the Dirección General de Turismo, Comercio y Consumo Navarra chose the target group definitions shown in the introduction to chapter 6.3 as part of the standard target group analysis.

In addition to the target group analysis, the report includes **further bivariate evaluations** of the tourist destination Navarra (see chapter 6.2), in which the attributed theme suitability of Navarra for the set of 10 holiday activities 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.

Standard
target group analysis

Additional comprehensive
options of the target
group analysis

Additional
differentiation according to
8 socio-demographic criteria

2.1.3 Analysis dimension 3: Competition

In total, **194 different tourist destinations** were included in the survey of the study Destination Brand 21 running in the period of October to December 2021 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 = 171 | AT = 30 | 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 was carried out for Navarra representing a central component of this report. The comparison with the competitors was made on the basis of “all respondents”, the respondents being “interested in the respective theme” as well as in the case of international destinations the respondents with a “distinct intention to travel abroad” both with regard to:

- the already introduced **“supported theme suitability”**
 - individual results of Navarra: see chapter 4.3
 - detailed rankings of all surveyed destinations: see chapter 7
- as well as the so-called **“unsupported theme suitability (top of mind)”**
 - individual results of Navarra: see chapter 3.1
 - top 10 rankings concerning the general themes: see chapter 3.2

To illustrate, the “unsupported theme suitability (top of mind)” is surveyed in order to analyse which (international or domestic) tourist destinations are spontaneously considered to be **particularly suitable** for the respective type of holiday (e.g. for a culinary journey). The corresponding open question is posed without providing any answer options.

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: 194 different
tourist destinations

Comprehensive
competitor analysis

Additional
competitor analysis
with regard to the “unsupported
theme suitability (top of mind)”

Appendix:
Descriptive reading examples

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2.2 Overview of the considered holiday activities

General themes

(examined for all destinations)

1. Culinary
2. Culture
3. Nature
4. Sports
5. City break



Specific themes

(individual selection of tourist destination Navarra)

- | | |
|---------------------------------------|-------------------------------------|
| 6. Barrier-free holiday trip | 27. Lively places |
| 7. Bauhaus | 28. Luxurious shopping |
| 8. Camping | 29. Luxury offers |
| 9. Castles | 30. Mountain biking |
| 10. Castles / gardens | 31. Museums |
| 11. Castles / mansions | 32. Regional products / specialties |
| 12. Christmas markets | 33. Relaxation |
| 13. City break with active recreation | 34. Riding |
| 14. (Small) city flair | 35. Sailing |
| 15. Countryside | 36. Shopping |
| 16. Culture- / music festivals | 37. Study / educational offers |
| 17. Cycling | 38. Sustainable trip |
| 18. Events | 39. Swimming / beach |
| 19. Families | 40. Traditional folk events |
| 20. Film locations | 41. UNESCO world heritage sites |
| 21. Footsteps of Martin Luther | 42. Volunteer / voluntary work |
| 22. Gardens / parks | 43. Water sports |
| 23. Golf | 44. Water-based holiday activities |
| 24. Health | 45. Wellness |
| 25. Hiking | 46. Wine tour |
| 26. Industrial heritage | 47. Winter sports |

Note 1: For purposes of clarity, this overview shows the short versions of the holiday themes surveyed in the source market Spain.

A complete overview of the detailed descriptions of the holiday activities (of all source markets) applied in the survey of the study Destination Brand 21 can be gained from the glossary (see chapter 9.2).

Note 2: Last survey taken into consideration in October until December 2021

Source: inspektour (international) GmbH, 2021

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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. Altenburger Land										
7. Altmark										
8. Ammergau Alps										
9. Austria										
10. Baden										
11. Baden-Württemberg										
12. Baltic Resort Binz										
13. Baltic Resort Kühlungsborn										
14. Baltic Sea										
15. Baltic Sea Schleswig-Holstein										
16. Basque Country										
17. Bavaria										
18. Bavarian Forest										
19. Berchtesgadener Land										
20. Bergisches Land										
21. Bergstrasse-Odenwald										
22. Berlin										
23. Berlin-Spandau										
24. Bilbao										
25. Black Forest										
26. Bonn										
27. Borkum										
28. Brandenburg										
29. Bremen										
30. Bremerhaven										
31. Burgenland										
32. Büsum										
33. Carinthia										
34. Chiemgau - Chiemsee										

	DE	AT	CH	NL	CN	FR	IT	ES	UK	US
35. Cologne										
36. Copenhagen										
37. Cottbus										
38. Dahme Lake District										
39. Darmstadt										
40. Dessau-Roßlau										
41. Dresden										
42. Dresden Elbland										
43. Duisburg										
44. Düsseldorf										
45. East Frisian Islands										
46. Eichsfeld										
47. Eifel										
48. Erfurt										
49. Fehmarn										
50. Fichtel Mountains										
51. Fläming										
52. Föhr										
53. Franconia										
54. Franconian Lake District										
55. Frankfurt on the Main										
56. FrankfurtRhineMain										
57. Freiburg in the Breisgau										
58. Füssen in the Allgäu										
59. Galicia										
60. Garmisch-Partenkirchen										
61. Gastein										
62. Geneva										
63. Germany										
64. Graz										
65. GrimmHome NorthHesse										
66. Halle (Saale)										
67. Hamburg										
68. Hanover										

Note 1: The source markets are marked in green, if the respective destination was surveyed there in the course of the study Destination Brand 21.

Note 2: Last survey taken into consideration in October until December 2021

Source: inspektour (international) GmbH, 2021

2.3 Overview of the considered tourist destinations

	DE	AT	CH	NL	CN	FR	IT	ES	UK	US
69. Harz										
70. Havelland										
71. Heidelberg										
72. Helsinki										
73. Hesse										
74. Holiday region Bernkastel-Kues - Moselle										
75. Holstein Switzerland										
76. Imperial Seaside Resorts										
77. Innsbruck										
78. Kaiserstuhl										
79. Kassel										
80. Kiel										
81. Lahn Valley										
82. Lake Constance										
83. Lake Starnberg										
84. Lake Wörthersee										
85. Lausanne										
86. Leipzig										
87. Liechtenstein										
88. Lower Austria										
89. Lower Rhine										
90. Lower Saxony										
91. Lübeck.Travemünde										
92. Lüneburg Heath										
93. Lusatian Lake District										
94. Luxembourg										
95. Madrid										
96. Magdeburg										
97. Magdeburg Elbe-Börde Heath										
98. Mainz										
99. Mecklenburg Lake District										
100. Mecklenburg-Western Pomerania										
101. Middle Rhine										
102. Montafon										

	DE	AT	CH	NL	CN	FR	IT	ES	UK	US
103. Moselle										
104. Most Quarter										
105. Munich										
106. Münsterland										
107. Nahe										
108. Naheland										
109. Navarre										
110. neanderland / district of Mettmann										
111. Norderney										
112. North Rhine-Westphalia										
113. North Sea										
114. North Sea Island Amrum										
115. North Sea Land Dithmarschen										
116. Nuremberg										
117. Nuremberg Land										
118. Oberstaufen										
119. Oberstaufen in the Allgäu										
120. Oder-Spree Lake District										
121. Ore Mountains										
122. Oslo										
123. Palatinate										
124. Pamplona										
125. Potsdam										
126. Region Stuttgart										
127. Rheingau										
128. Rhine Hesse										
129. Rhineland-Palatinate										
130. Rhön										
131. Romantic Rhine										
132. Rostock-Warnemünde										
133. Rothenburg ob der Tauber										
134. Rudesheim and Assmannshausen on the Rhine										
135. Rügen Island										
136. Ruhr Valley										

Note 1: The source markets are marked in green, if the respective destination was surveyed there in the course of the study Destination Brand 21.

Note 2: Last survey taken into consideration in October until December 2021

Source: inspektour (international) GmbH, 2021

2.3 Overview of the considered tourist destinations

	DE	AT	CH	NL	CN	FR	IT	ES	UK	US
137. Ruppın Lake District										
138. Saale-Unstrut										
139. Saarbrücken										
140. Saarland										
141. Salzburg										
142. Salzburger Land										
143. Salzkammergut										
144. Santiago de Compostela										
145. Sauerland										
146. Saxonian Switzerland-Elbe Sandstone Mountains										
147. Saxony										
148. Saxony-Anhalt										
149. Schladming-Dachstein										
150. Schleswig-Holstein										
151. Schwerin										
152. South Tirol										
153. Southern Harz-Kyffhäuser										
154. Spain										
155. Spandau										
156. Spessart										
157. Spreewald										
158. St. Peter-Ording										
159. Stockholm										
160. Stuttgart										
161. Styria										
162. Switzerland										
163. Sylt										
164. Taunus										
165. Teutoburg Forest										
166. the Prignitz										
167. Thuringia										
168. Thuringian Forest										
169. Tirol										
170. Trier										

	DE	AT	CH	NL	CN	FR	IT	ES	UK	US
171. Uckermark										
172. Upper Austria										
173. Upper Bavaria										
174. Upper Black Forest, the region around Feldberg, Titisee, Schluchsee and Hinterzarten										
175. Upper Lusatia										
176. Upper Palatinate Forest										
177. Upper Swabia										
178. Usedom Island										
179. Vienna										
180. Vogelsberg										
181. Vogtland										
182. Vorarlberg										
183. Weimar										
184. Weimarer Land										
185. Weserbergland										
186. Westerwald										
187. Wiesbaden										
188. Wild Kaiser Mountain Range – Ellmau, Going, Scheffau and Söll										
189. Winterberg										
190. World Heritage Region Anhalt-Dessau-Wittenberg										
191. World Heritage Region Wartburg Hainich										
192. Zell am See-Kaprun										
193. Zugspitze region										
194. 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 21.

Note 2: Last survey taken into consideration in October until December 2021

Source: inspektour (international) GmbH, 2021

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3.1 Individual results Navarra

3.2 Top 10 rankings

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3.1 Unsupported theme competence (top of mind) – Competitor analysis Navarre

Please imagine that you intend to **go on a [here theme inserted] holiday**.

Which tourist destinations (cities, regions etc.) in Spain do you consider particularly suitable for this purpose?
(max. 3 responses)

■ Navarre

Source market: Spain

Number of respondents: min. 402

Number of responses: min. 881

Base: All respondents (valid responses)

Unsupported theme competence as a domestic tourist destination ...		DESTINATION BRAND 21			
		% of respondents*	% of responses	number of responses	rank
... for a culinary trip	Navarre	1.6%	0.7%	9	26.
... for a cultural holiday / a cultural trip	Navarre	1.6%	0.7%	9	23.
... for a nature holiday	Navarre	6.2%	2.6%	36	6.
... for an active sports holiday	Navarre	1.0%	0.5%	4	35.
... for a city break	Navarre	0.5%	0.2%	3	47.

* Multiple answers possible.

3.1 Unsupported theme competence (top of mind) – Competitor analysis Navarre

Please imagine that you intend to **go on a [here theme inserted] holiday**.

Which tourist destinations (cities, regions etc.) in Spain do you consider particularly suitable for this purpose?
 (max. 3 responses)

■ Navarre

Source market: Spain

Number of respondents: min. 174

Number of responses: min. 387

Base: All respondents with interest
 in the theme (valid responses)

Unsupported theme competence as a domestic tourist destination ...		DESTINATION BRAND 21			
		% of respondents*	% of responses	number of responses	rank
... for a culinary trip	Navarre	1.7%	0.7%	8	23.
... for a cultural holiday / a cultural trip	Navarre	1.9%	0.8%	8	22.
... for a nature holiday	Navarre	6.4%	2.6%	29	7.
... for an active sports holiday	No association	0.0%	0.0%	0	--
... for a city break	Navarre	0.4%	0.2%	2	49.

* Multiple answers possible.

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3.2 Unsupported theme competence (top of mind) – Competitor analysis Top 10 destinations

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

Which tourist destinations (countries, cities, regions etc.) in Spain do you consider particularly suitable for this purpose? (max. 3 responses)

■ Culinary

Source market: Spain

Number of respondents: 568

Number of responses: 1,370

Base: All respondents (valid responses)

Unsupported theme competence (top of mind) “Culinary trip” – Top 10 domestic destinations		% of respondents*	% of responses	number of responses
1	Galicia	38.4%	15.9%	218
2	Basque Country	29.9%	12.4%	170
3	Asturias	24.5%	10.1%	139
4	Valencia	13.9%	5.8%	79
5	Andalusia	13.6%	5.6%	77
6	Madrid	12.9%	5.3%	73
7	Barcelona	7.2%	3.0%	41
8	Cantabria	6.7%	2.8%	38
9	Donostia-San Sebastian	6.3%	2.6%	36
10	Bilbao	6.0%	2.5%	34

* Multiple answers possible.

► **Note:** Similar terms with identical destination reference (e.g., North Sea - North Sea Coast - North Sea Region) were assigned to each other and clustered.

Source: inspektour (international) GmbH, 2021

3.2 Unsupported theme competence (top of mind) – Competitor analysis Top 10 destinations

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

Which tourist destinations (countries, cities, regions etc.) in Spain do you consider particularly suitable for this purpose? (max. 3 responses)

■ Culinary

Source market: Spain

Number of respondents: 460

Number of responses: 1,123

Base: All respondents with interest in the theme (valid responses)

Unsupported theme competence (top of mind) “Culinary trip” – Top 10 domestic destinations		% of respondents*	% of responses	number of responses
1	Galicia	40.9%	16.7%	188
2	Basque Country	30.0%	12.3%	138
3	Asturias	26.7%	11.0%	123
4	Andalusia	14.3%	5.9%	66
4	Valencia	14.3%	5.9%	66
6	Madrid	12.4%	5.1%	57
7	Cantabria	7.4%	3.0%	34
8	Barcelona	6.5%	2.7%	30
8	Donostia-San Sebastian	6.5%	2.7%	30
10	Bilbao	6.3%	2.6%	29

* Multiple answers possible.

► **Note:** Similar terms with identical destination reference (e.g., North Sea - North Sea Coast - North Sea Region) were assigned to each other and clustered.

Source: inspektour (international) GmbH, 2021

3.2 Unsupported theme competence (top of mind) – Competitor analysis Top 10 destinations

Please imagine that you intend to **go on a cultural holiday / a cultural trip**.

Which tourist destinations (countries, cities, regions etc.) in Spain do you consider particularly suitable for this purpose? (max. 3 responses)

■ Culture

Source market: Spain

Number of respondents: 574

Number of responses: 1,349

Base: All respondents (valid responses)

Unsupported theme competence (top of mind) “Cultural holiday / a cultural trip” – Top 10 domestic destinations		% of respondents*	% of responses	number of responses
1	Madrid	38.5%	16.4%	221
2	Barcelona	24.0%	10.2%	138
3	Granada	14.3%	6.1%	82
4	Galicia	13.8%	5.9%	79
5	Seville	12.5%	5.3%	72
6	Toledo	11.8%	5.0%	68
7	Andalusia	9.4%	4.0%	54
8	Cordoba	8.4%	3.6%	48
9	Salamanca	8.0%	3.4%	46
10	Asturias	7.8%	3.3%	45

* Multiple answers possible.

► **Note:** Similar terms with identical destination reference (e.g., North Sea - North Sea Coast - North Sea Region) were assigned to each other and clustered.

Source: inspektour (international) GmbH, 2021

3.2 Unsupported theme competence (top of mind) – Competitor analysis Top 10 destinations

Please imagine that you intend to **go on a cultural holiday / a cultural trip**.

Which tourist destinations (countries, cities, regions etc.) in Spain do you consider particularly suitable for this purpose? (max. 3 responses)

■ Culture

Source market: Spain

Number of respondents: 414

Number of responses: 997

Base: All respondents with interest in the theme (valid responses)

Unsupported theme competence (top of mind) “Cultural holiday / a cultural trip” – Top 10 domestic destinations		% of respondents*	% of responses	number of responses
1	Madrid	39.6%	16.4%	164
2	Barcelona	25.8%	10.7%	107
3	Granada	15.9%	6.6%	66
4	Galicia	13.3%	5.5%	55
5	Toledo	13.0%	5.4%	54
6	Seville	11.8%	4.9%	49
7	Andalusia	11.1%	4.6%	46
8	Cordoba	8.2%	3.4%	34
9	Asturias	7.7%	3.2%	32
9	Salamanca	7.7%	3.2%	32
9	Valencia	7.7%	3.2%	32

* Multiple answers possible.

► **Note:** Similar terms with identical destination reference (e.g., North Sea - North Sea Coast - North Sea Region) were assigned to each other and clustered.

Source: inspektour (international) GmbH, 2021

3.2 Unsupported theme competence (top of mind) – Competitor analysis Top 10 destinations

Please imagine that you intend to **go on a nature holiday**.

Which tourist destinations (countries, cities, regions etc.) in Spain do you consider particularly suitable for this purpose? (max. 3 responses)

■ Nature

Source market: Spain

Number of respondents: 581

Number of responses: 1,378

Base: All respondents (valid responses)

Unsupported theme competence (top of mind) "Nature holiday" – Top 10 domestic destinations		% of respondents*	% of responses	number of responses
1	Asturias	36.3%	15.3%	211
2	Galicia	32.9%	13.9%	191
3	Cantabria	17.6%	7.4%	102
4	Pyrenees	13.1%	5.5%	76
5	Basque Country	11.5%	4.9%	67
6	Navarre	6.2%	2.6%	36
7	Andalusia	5.9%	2.5%	34
8	Canary Islands	4.5%	1.9%	26
9	Extremadura	4.0%	1.7%	23
9	Huesca	4.0%	1.7%	23
9	Catalonia	4.0%	1.7%	23
9	Madrid	4.0%	1.7%	23

* Multiple answers possible.

► **Note:** Similar terms with identical destination reference (e.g., North Sea - North Sea Coast - North Sea Region) were assigned to each other and clustered.

Source: inspektour (international) GmbH, 2021

3.2 Unsupported theme competence (top of mind) – Competitor analysis Top 10 destinations

Please imagine that you intend to **go on a nature holiday**.

Which tourist destinations (countries, cities, regions etc.) in Spain do you consider particularly suitable for this purpose? (max. 3 responses)

■ Nature

Source market: Spain

Number of respondents: 452

Number of responses: 1,106

Base: All respondents with interest in the theme (valid responses)

Unsupported theme competence (top of mind) "Nature holiday" – Top 10 domestic destinations		% of respondents*	% of responses	number of responses
1	Asturias	37.4%	15.3%	169
2	Galicia	34.3%	14.0%	155
3	Cantabria	18.4%	7.5%	83
4	Pyrenees	13.5%	5.5%	61
5	Basque Country	11.5%	4.7%	52
6	Andalusia	6.6%	2.7%	30
7	Navarre	6.4%	2.6%	29
8	Canary Islands	4.6%	1.9%	21
9	Huesca	4.2%	1.7%	19
9	Catalonia	4.2%	1.7%	19

* Multiple answers possible.

► **Note:** Similar terms with identical destination reference (e.g., North Sea - North Sea Coast - North Sea Region) were assigned to each other and clustered.

Source: inspektour (international) GmbH, 2021

3.2 Unsupported theme competence (top of mind) – Competitor analysis Top 10 destinations

Please imagine that you intend to **go on an active sports holiday**.

Which tourist destinations (countries, cities, regions etc.) in Spain do you consider particularly suitable for this purpose? (max. 3 responses)

■ Sports

Source market: Spain

Number of respondents: 402

Number of responses: 881

Base: All respondents (valid responses)

Unsupported theme competence (top of mind) “Active sports holiday” – Top 10 domestic destinations		% of respondents*	% of responses	number of responses
1	Madrid	20.6%	9.4%	83
2	Valencia	17.4%	7.9%	70
3	Barcelona	16.7%	7.6%	67
4	Asturias	14.4%	6.6%	58
5	Galicia	10.2%	4.7%	41
6	Cadiz	9.5%	4.3%	38
7	Basque Country	8.2%	3.7%	33
7	Pyrenees	8.2%	3.7%	33
9	Andalusia	6.7%	3.1%	27
10	Seville	6.5%	3.0%	26

* Multiple answers possible.

► **Note:** Similar terms with identical destination reference (e.g., North Sea - North Sea Coast - North Sea Region) were assigned to each other and clustered.

Source: inspektour (international) GmbH, 2021

3.2 Unsupported theme competence (top of mind) – Competitor analysis Top 10 destinations

Please imagine that you intend to **go on an active sports holiday**.

Which tourist destinations (countries, cities, regions etc.) in Spain do you consider particularly suitable for this purpose? (max. 3 responses)

■ Sports

Source market: Spain

Number of respondents: 174

Number of responses: 387

Base: All respondents with interest in the theme (valid responses)

Unsupported theme competence (top of mind) “Active sports holiday” – Top 10 domestic destinations		% of respondents*	% of responses	number of responses
1	Madrid	21.8%	9.8%	38
1	Valencia	21.8%	9.8%	38
3	Barcelona	17.8%	8.0%	31
4	Asturias	15.5%	7.0%	27
5	Cadiz	10.3%	4.7%	18
5	Galicia	10.3%	4.7%	18
7	Andalusia	8.0%	3.6%	14
8	Basque Country	7.5%	3.4%	13
8	Seville	7.5%	3.4%	13
10	Cantabria	6.9%	3.1%	12

* Multiple answers possible.

► **Note:** Similar terms with identical destination reference (e.g., North Sea - North Sea Coast - North Sea Region) were assigned to each other and clustered.

Source: inspektour (international) GmbH, 2021

3.2 Unsupported theme competence (top of mind) – Competitor analysis Top 10 destinations

Please imagine that you intend to **go on a city break**.

Which tourist destinations (countries, cities, regions etc.) in Spain do you consider particularly suitable for this purpose? (max. 3 responses)

■ City break

Source market: Spain

Number of respondents: 586

Number of responses: 1,369

Base: All respondents (valid responses)

Unsupported theme competence (top of mind) “City break” – Top 10 domestic destinations		% of respondents*	% of responses	number of responses
1	Madrid	33.1%	14.2%	194
2	Barcelona	24.6%	10.5%	144
3	Seville	22.0%	9.4%	129
4	Granada	13.1%	5.6%	77
5	Malaga	10.1%	4.3%	59
6	Valencia	9.4%	4.0%	55
7	Donostia-San Sebastian	8.0%	3.4%	47
8	Galicia	7.7%	3.3%	45
9	Toledo	7.5%	3.2%	44
10	Bilbao	7.0%	3.0%	41

* Multiple answers possible.

► **Note:** Similar terms with identical destination reference (e.g., North Sea - North Sea Coast - North Sea Region) were assigned to each other and clustered.

Source: inspektour (international) GmbH, 2021

3.2 Unsupported theme competence (top of mind) – Competitor analysis Top 10 destinations

Please imagine that you intend to **go on a city break**.

Which tourist destinations (countries, cities, regions etc.) in Spain do you consider particularly suitable for this purpose? (max. 3 responses)

■ City break

Source market: Spain

Number of respondents: 478

Number of responses: 1,149

Base: All respondents with interest in the theme (valid responses)

Unsupported theme competence (top of mind) “City break” – Top 10 domestic destinations		% of respondents*	% of responses	number of responses
1	Madrid	32.4%	13.5%	155
2	Barcelona	25.7%	10.7%	123
3	Seville	22.8%	9.5%	109
4	Granada	15.1%	6.3%	72
5	Malaga	10.0%	4.2%	48
6	Donostia-San Sebastian	9.2%	3.8%	44
7	Valencia	9.0%	3.7%	43
8	Galicia	7.9%	3.3%	38
9	Cordoba	7.7%	3.2%	37
10	Bilbao	7.5%	3.1%	36

* Multiple answers possible.

► **Note:** Similar terms with identical destination reference (e.g., North Sea - North Sea Coast - North Sea Region) were assigned to each other and clustered.

Source: inspektour (international) GmbH, 2021

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4 OVERVIEW OF KEY RESULTS: THREE-DIMENSIONAL THEME COMPETENCE ANALYSIS

4.1 Demand: General interest potential

4.2 Supply: Supported theme suitability Navarra

4.3 Competition: Comparison with competitors

4.4 Summary: Quadrant analysis

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4.1 Demand: General interest potential – All considered holiday activities (1/2)



Ranking of the considered holiday activities with regard to the general interest potential (mean = 52%)

Source market: Spain

Base: All respondents | Number of respondents: 1,000


Top-two-box on a scale from "5 = very interested" to "1 = not at all interested"

		% of resp.	projection*			% of resp.	projection
1	Taking a city break	77%	26.3 m	13	Visiting UNESCO world heritage sites	65%	22.2 m
2	Relaxing and resting	76%	26.0 m	14	Visiting museums / exhibitions / art museums	64%	22.0 m
3	Enjoying culinary / gastronomic specialities	74%	25.3 m	15	Undertaking a barrier-free holiday trip	63%	21.6 m
4	Enjoying nature	73%	25.2 m	16	Swimming and being at the beach	62%	21.4 m
5	Visiting castles and mansions	72%	24.8 m	17	Using family offers	59%	20.2 m
6	Visiting castles, palaces and cathedrals	72%	24.6 m	18	Using wellness services	58%	20.1 m
7	Discovering regional products / enjoying regional specialities	72%	24.5 m	19	Experiencing lively places (e.g., trendy shopping districts, festivals, alternative cultural circles, night life)	57%	19.5 m
8	Enjoying the (small) city flair / atmosphere	70%	24.0 m	20	Attending culture- / music festivals	56%	19.1 m
9	Visiting castles, mansions, parks and gardens	70%	23.8 m	21	Undertaking a sustainable holiday trip (nature preserving / environmentally friendly, economically and socially fair)	54%	18.5 m
10	Visiting cultural institutions / using cultural services	66%	22.7 m	22	Attending events	53%	18.2 m
11	Visiting gardens / parks	66%	22.7 m	23	Shopping	53%	18.2 m
12	Visiting Christmas markets	65%	22.2 m	24	Hiking	51%	17.3 m

* Projection of the absolute volume of the prospective interest potential (number of people).

► **Note:** Last survey taken into consideration in October until December 2021

4.1 Demand: General interest potential – All considered holiday activities (2/2)

<div>  Ranking of the considered holiday activities with regard to the general interest potential (mean = 52%) Source market: Spain Base: All respondents Number of respondents: 1,000 Top-two-box on a scale from "5 = very interested" to "1 = not at all interested" </div>							
		% of resp.	projection*			% of resp.	projection*
25	Spending holidays in the countryside (e.g., on the farm or vineyard)	49%	16.9 m	37	Using study / educational offers	36%	12.2 m
26	Visiting industrial heritage sites (e.g., factories, (coal) mines, museums of industrial heritage)	49%	16.8 m	38	Cycling (not mountain biking)	35%	12.0 m
27	Experiencing Bauhaus and architecture of Classical Modernism	49%	16.8 m	39	Tracing the footsteps of Martin Luther	35%	11.9 m
28	Enjoying water-based holiday activities	48%	16.4 m	40	Mountain biking	34%	11.6 m
29	Taking a city break with active recreation (e.g., on / in the water, cycling, hiking)	47%	16.1 m	41	Horseback riding	33%	11.2 m
30	Attending traditional folk events (e.g., marksmen's festivals, carnivals, fairs)	46%	15.9 m	42	Luxurious shopping	32%	10.9 m
31	Visiting film locations	45%	15.6 m	43	Practicing water sports (not sailing)	32%	10.9 m
32	Taking a wine tour (e.g., wine tasting, visiting wine festivals, vineyard walks, participating in the grape harvest)	44%	15.0 m	44	Performing volunteer / voluntary work (supporting a social or environmental project)	32%	10.9 m
33	Using luxury offers	40%	13.8 m	45	Practicing winter sports (e.g., cross-country skiing, downhill)	31%	10.7 m
34	Taking a camping holiday / caravanning holiday / motorhome holiday	38%	13.2 m	46	Sailing	29%	10.0 m
35	Being active and involved in sports	37%	12.9 m	47	Playing golf (not minigolf)	25%	8.5 m
36	Using health services (self-paying, not a prescribed visit to a health spa)	37%	12.8 m				

* Projection of the absolute volume of the prospective interest potential (number of people).

► **Note:** Last survey taken into consideration in October until December 2021

4.1 Demand: General interest potential – General themes

General interest potential of the general themes

> The following question is about your general interest in touristic holiday activities, regardless of a specific tourist destination. How interested are you in pursuing the following touristic holiday activities as part of your holiday trip with at least one overnight stay?

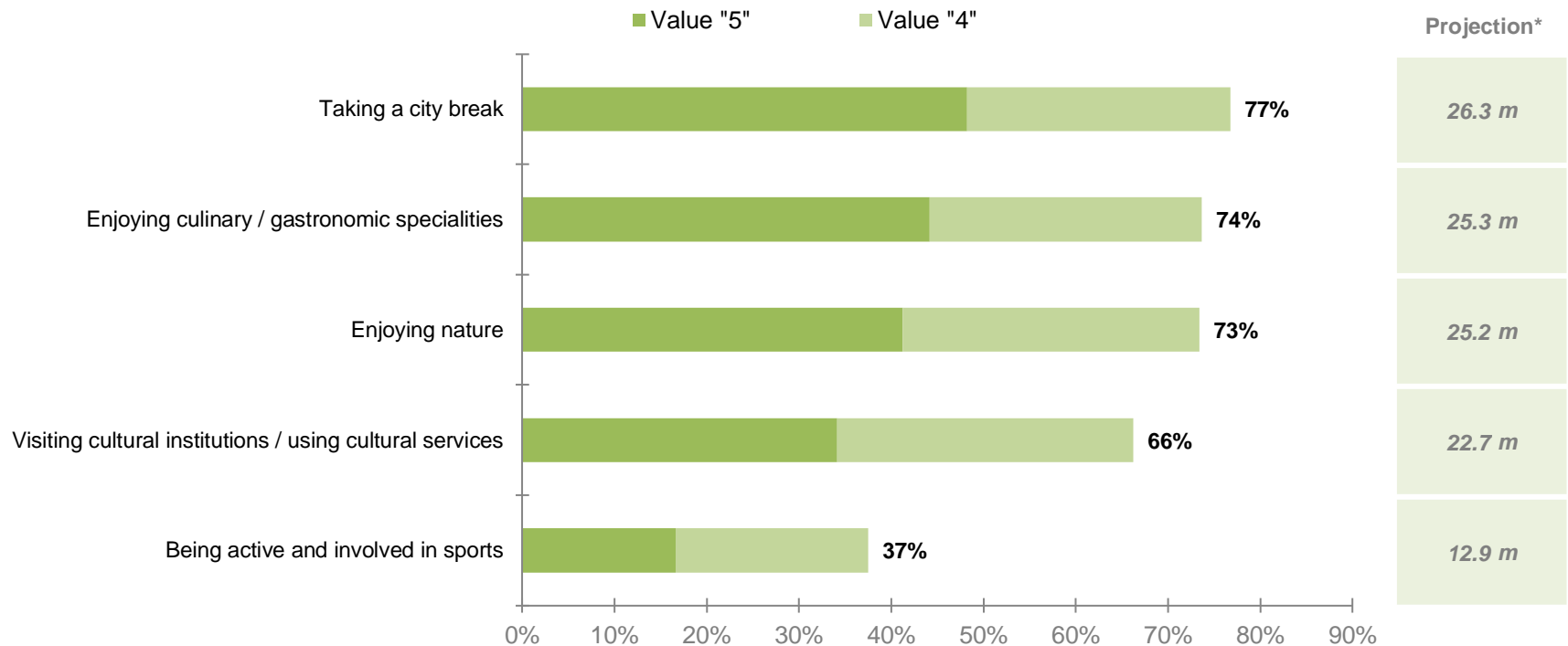
> Top-two-box on a scale from "5 = very interested" to "1 = not at all interested" (in % of respondents)

General themes

Source market: Spain

Base: All respondents

Number of respondents: 1,000



* Projection of the absolute volume of the prospective interest potential (number of people).

4.1 Demand: General interest potential – *Specific themes*

General interest potential of the specific themes

> The following question is about your general interest in touristic holiday activities, regardless of a specific tourist destination. How interested are you in pursuing the following touristic holiday activities as part of your holiday trip with at least one overnight stay?

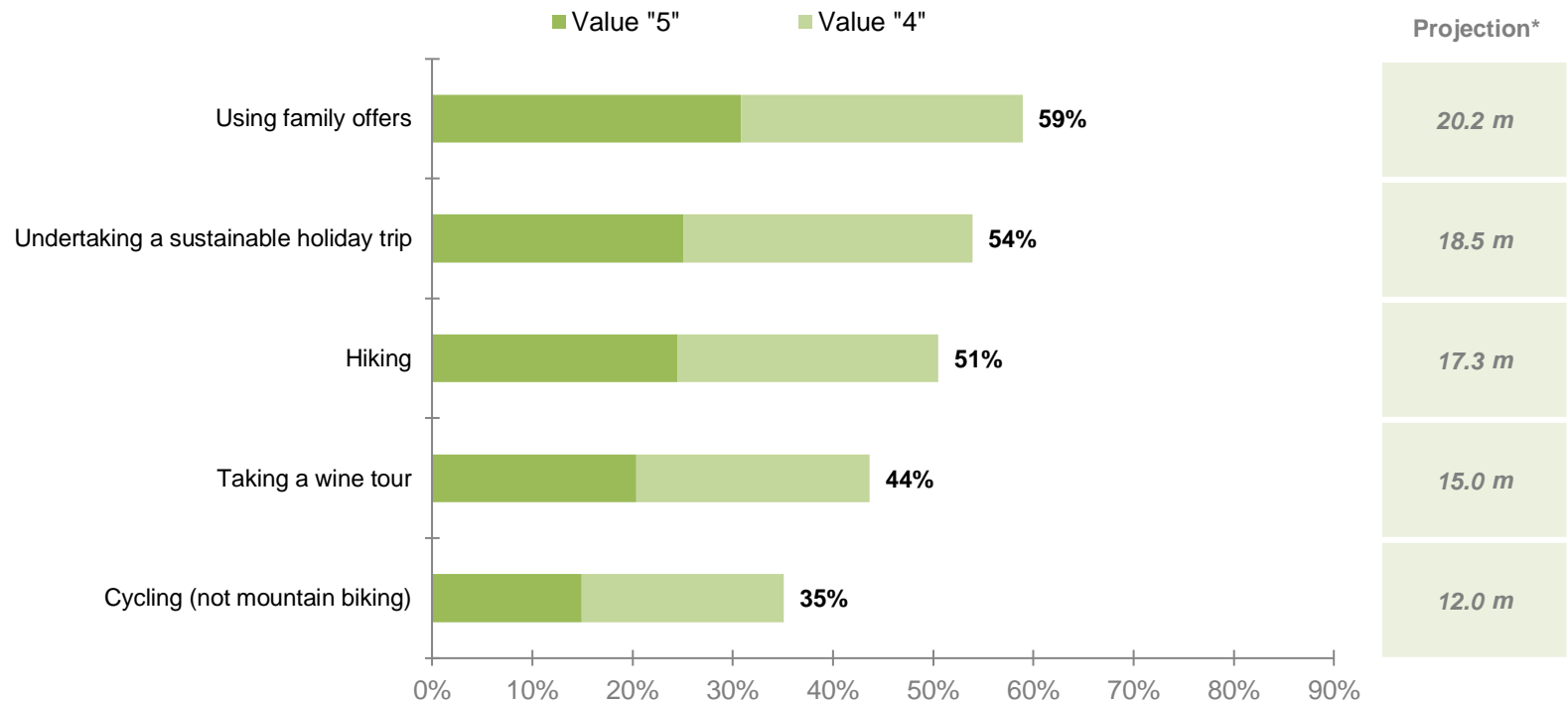
> Top-two-box on a scale from "5 = very interested" to "1 = not at all interested" (in % of respondents)

■ Specific themes of Navarra

Source market: Spain

Base: All respondents

Number of respondents: 1,000



* Projection of the absolute volume of the prospective interest potential (number of people).

4.1 Demand: General interest potential – *Polarity profile*

General interest potential – Polarity profile

> Mean values (Scale from “5 = very interested” to “1 = not at all interested”)

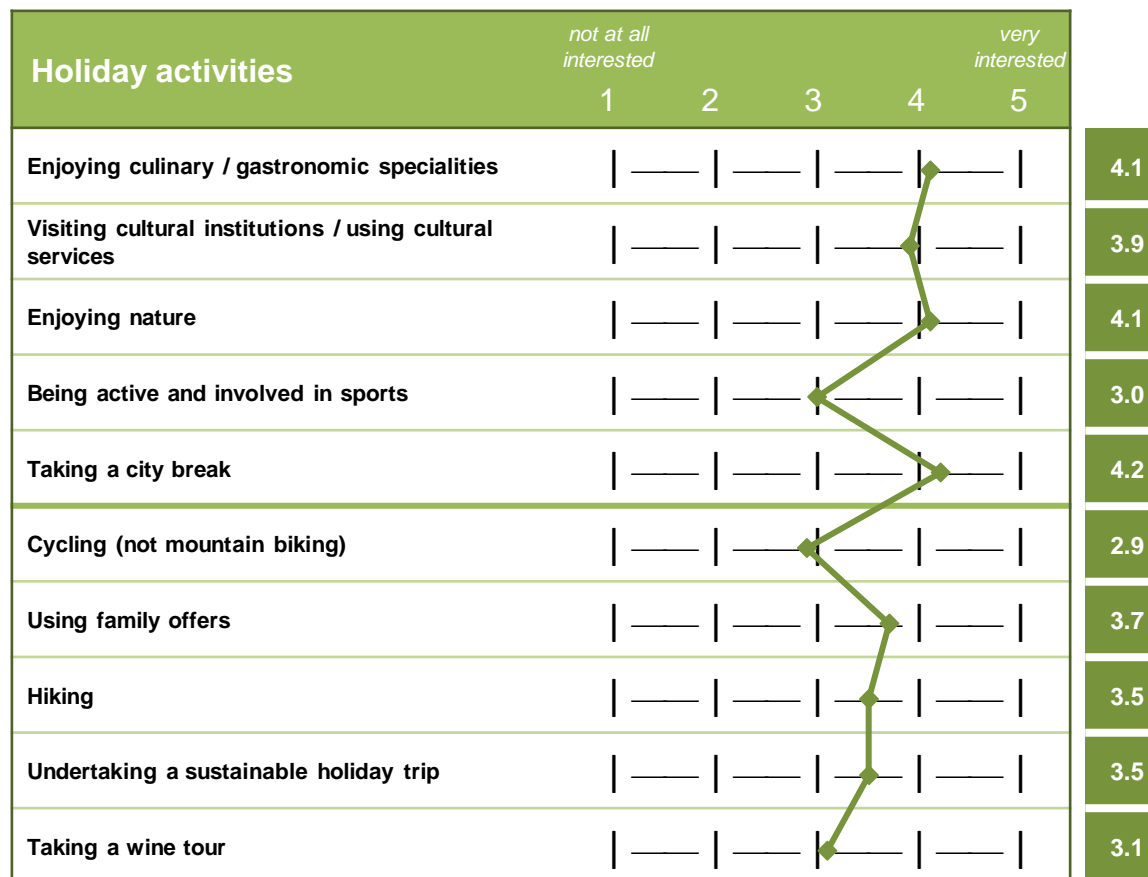
■ Holiday activities of Navarra

Source market: Spain

Base: All respondents

Number of respondents: 1,000

◆ Base “All respondents”



Source: inspektour (international) GmbH, 2021

4.1 Demand: General interest potential – Comparison by source market

General interest potential of the general themes

> The following question is about your general interest in touristic holiday activities, regardless of a specific tourist destination. How interested are you in pursuing the following touristic holiday activities as part of your holiday trip with at least one overnight stay?

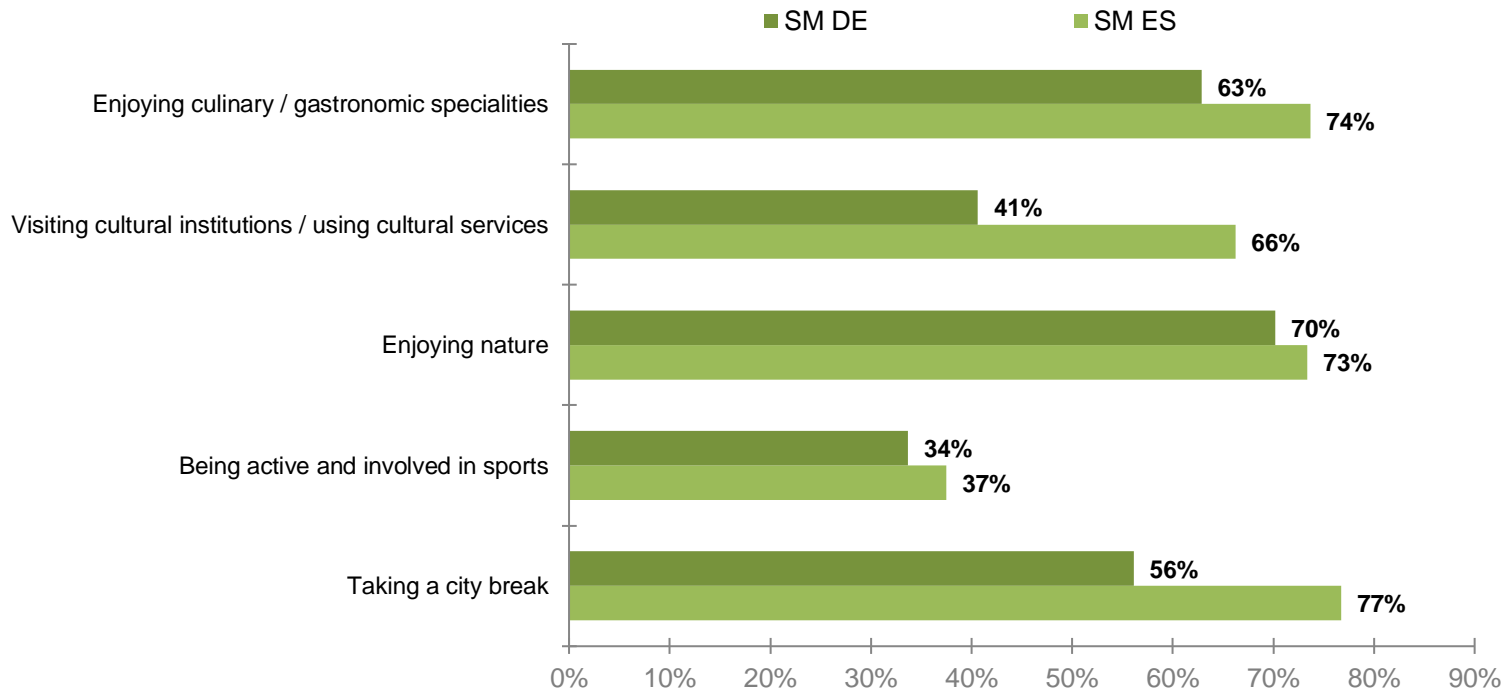
> Top-two-box on a scale from “5 = very interested” to “1 = not at all interested” (in % of respondents)

■ General themes

Source market: Comparison

Base: All respondents

Number of respondents: min. 1,000



Source: inspektour (international) GmbH, 2021

4.1 Demand: General interest potential – Comparison by source market

General interest potential of the specific themes

> The following question is about your general interest in touristic holiday activities, regardless of a specific tourist destination. How interested are you in pursuing the following touristic holiday activities as part of your holiday trip with at least one overnight stay?

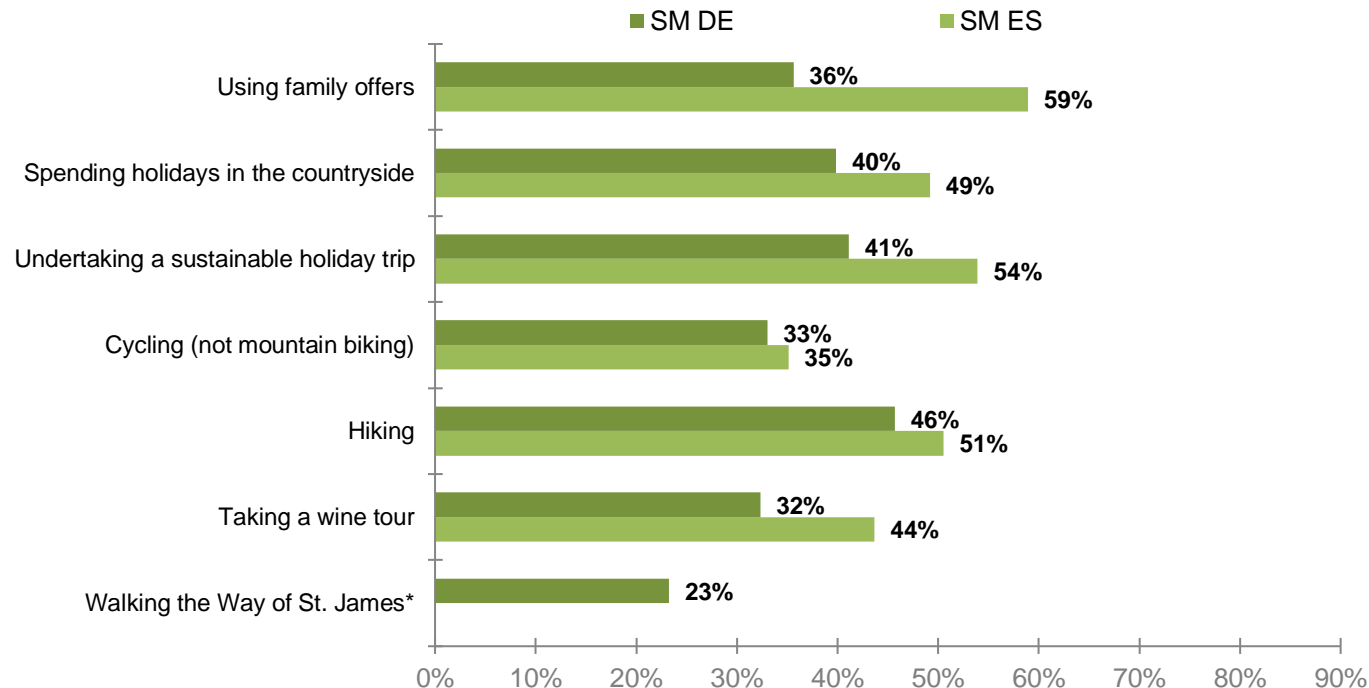
> Top-two-box on a scale from “5 = very interested” to “1 = not at all interested” (in % of respondents)

■ Specific themes of Navarra

Source market: Comparison

Base: All respondents

Number of respondents: min. 1,000



* The theme “Way of St. James” was not surveyed in the source market Spain.

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1 GENERAL OVERVIEW OF THE STUDY SERIES DESTINATION BRAND

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4 OVERVIEW OF KEY RESULTS: THREE-DIMENSIONAL THEME COMPETENCE ANALYSIS

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4.2 Supply: Supported theme suitability Navarra

4.3 Competition: Comparison with competitors

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4.2 Supply: Supported theme suitability – General themes

Supported theme suitability of the general themes

> In your opinion, to what extent is the following domestic tourist destination suitable for the holiday activities below (regardless of your own interest in the holiday activities)?

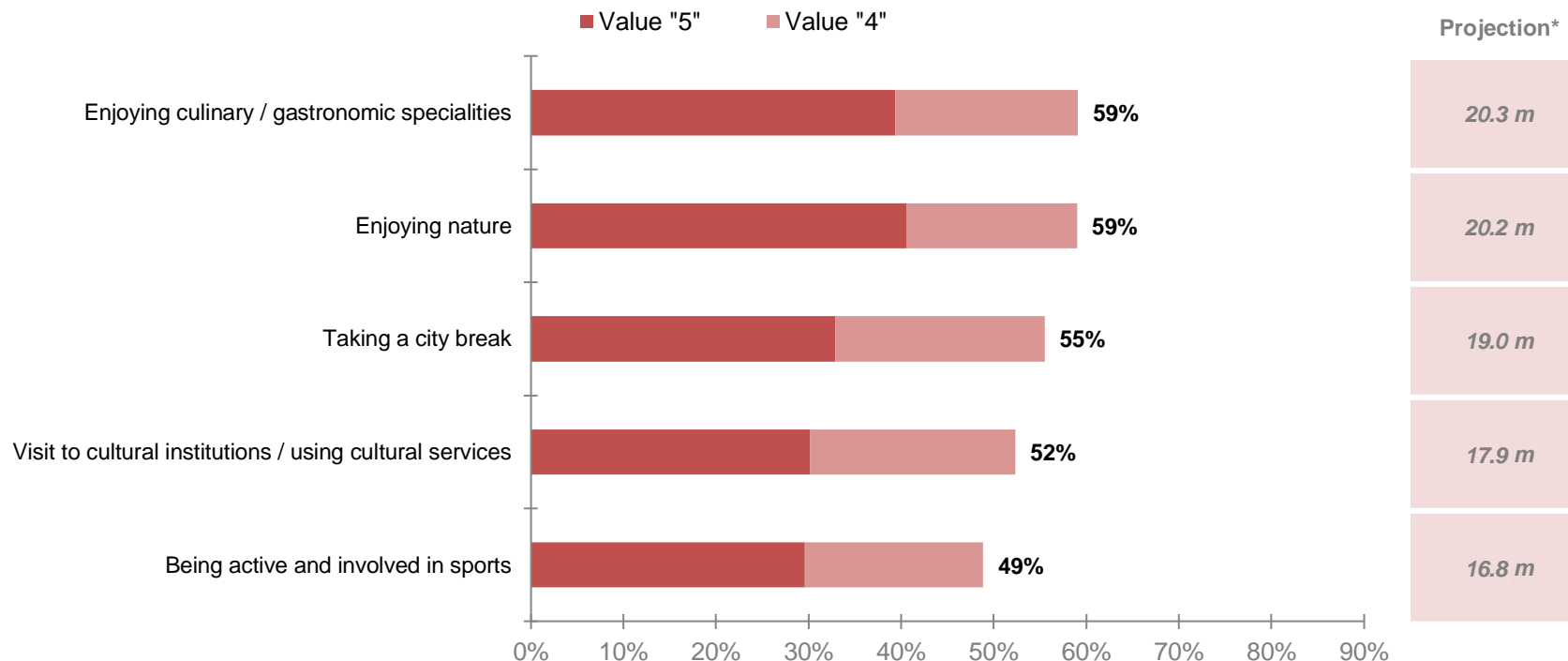
> Top-two-box on a scale from “5 = very suitable” to “1 = not at all suitable” (in % of respondents)

■ Navarra

Source market: Spain

Base: All respondents

Number of respondents: 1,000



* Projection of the absolute volume of the attributed suitability of each theme (number of people).

► Note: Queried designation of Navarre for Spanish respondents = “Navarra”

Source: inspektour (international) GmbH, 2021

4.2 Supply: Supported theme suitability – *Specific themes*

Supported theme suitability of the specific themes

> In your opinion, to what extent is the following domestic tourist destination suitable for the holiday activities below (regardless of your own interest in the holiday activities)?

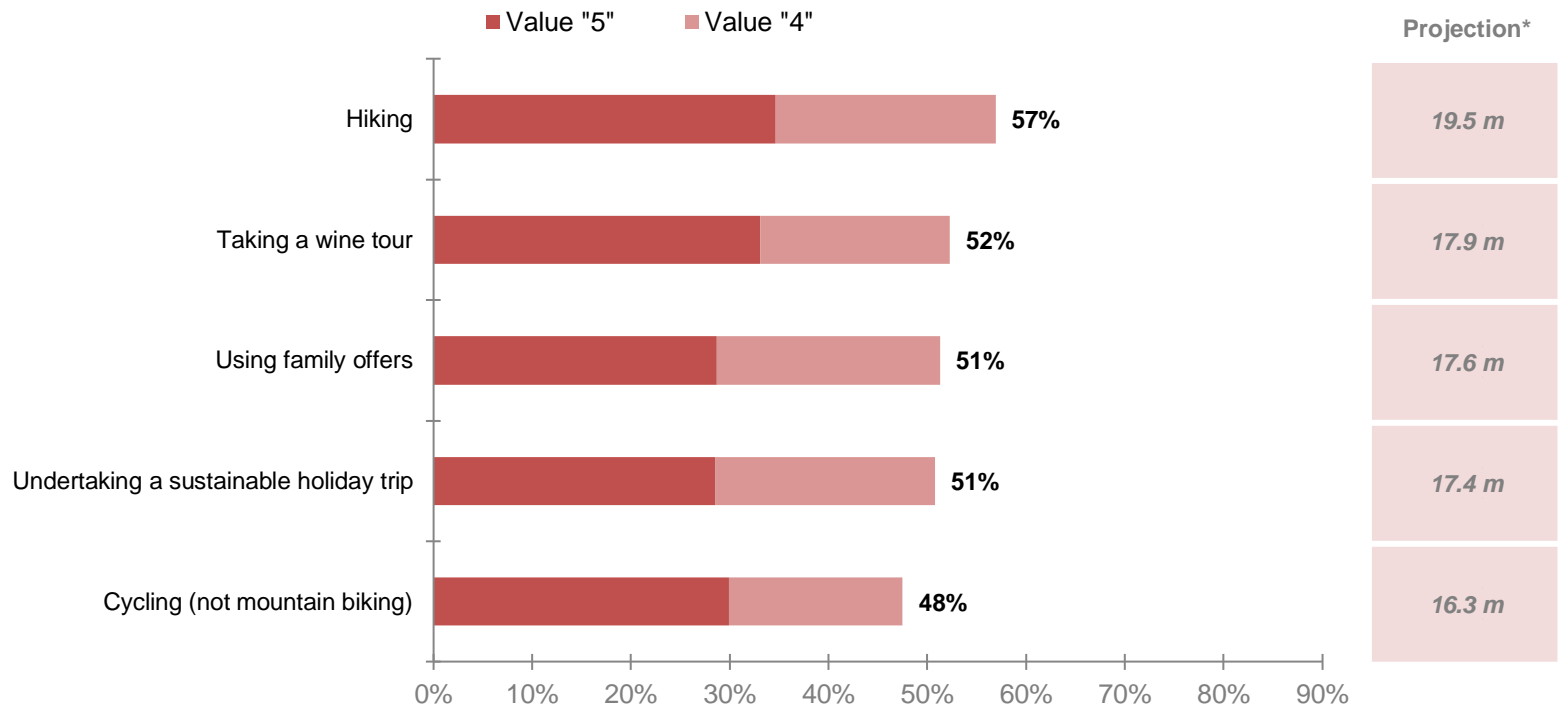
> Top-two-box on a scale from “5 = very suitable” to “1 = not at all suitable” (in % of respondents)

■ **Navarra**

Source market: Spain

Base: All respondents

Number of respondents: 1,000



* Projection of the absolute volume of the attributed suitability of each theme (number of people).

► **Note:** Queried designation of Navarra for Spanish respondents = “Navarra”

Source: inspektour (international) GmbH, 2021

4.2 Supply: Supported theme suitability – General themes by subgroups

Supported theme suitability of the general themes

> In your opinion, to what extent is the following domestic tourist destination suitable for the holiday activities below (regardless of your own interest in the holiday activities)?

> Top-two-box on a scale from “5 = very suitable” to “1 = not at all suitable” (in % of respondents)

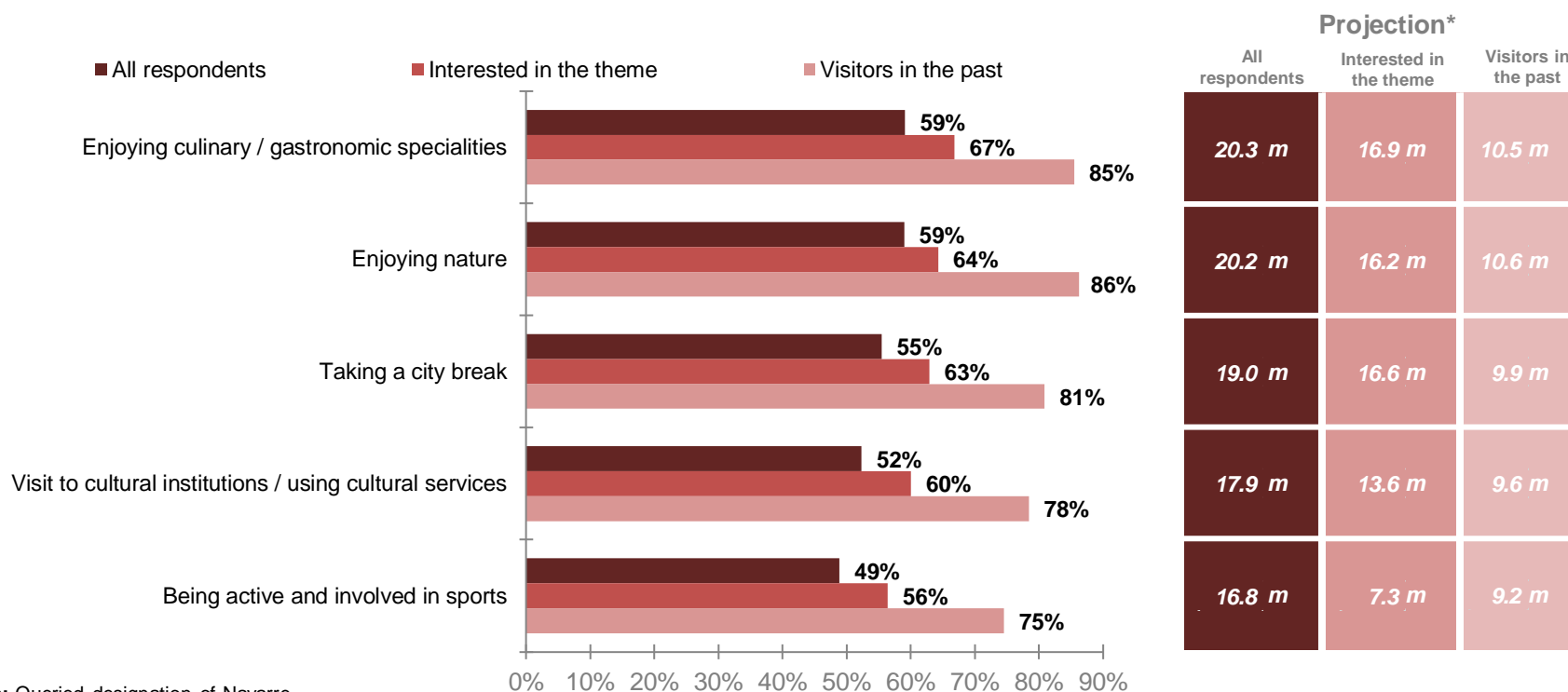
■ Navarra

Source market: Spain

Base: All respondents

Number of respondents: 1,000

Number of resp. by subgroups: varying



► **Note:** Queried designation of Navarre for Spanish respondents = “Navarra”

* Projection of the absolute volume of the attributed suitability of each theme (number of people).

Source: inspektour (international) GmbH, 2021

4.2 Supply: Supported theme suitability – Specific themes by subgroups

Supported theme suitability of the specific themes

> In your opinion, to what extent is the following domestic tourist destination suitable for the holiday activities below (regardless of your own interest in the holiday activities)?

> Top-two-box on a scale from “5 = very suitable“ to “1 = not at all suitable” (in % of respondents)

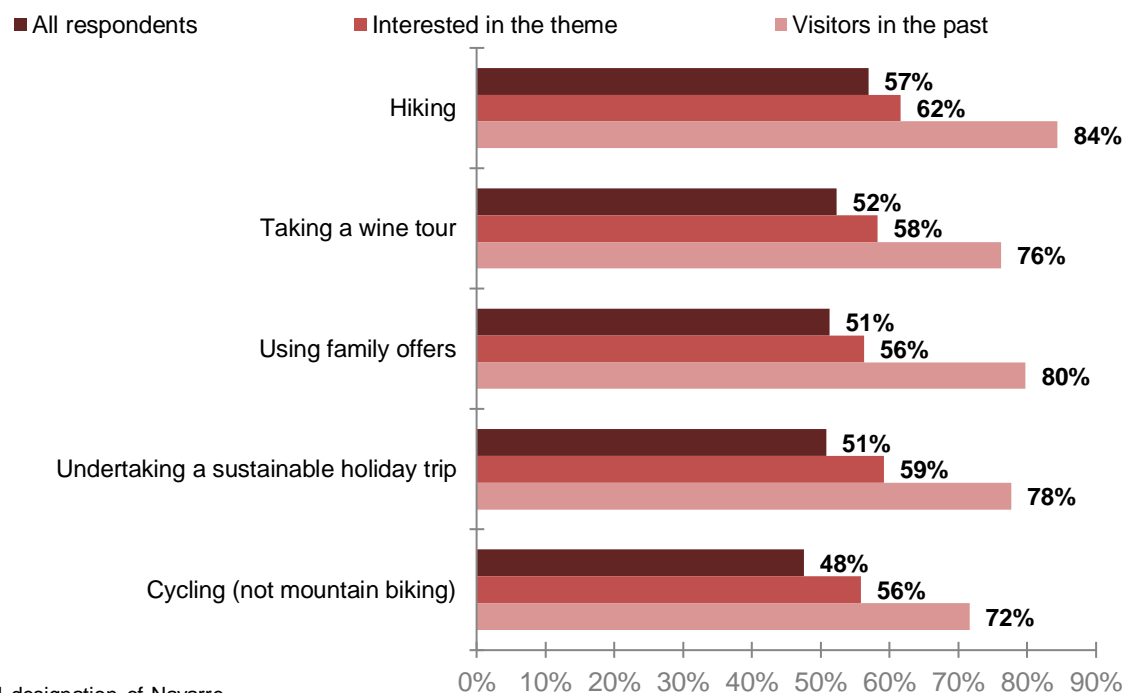
■ Navarra

Source market: Spain

Base: All respondents

Number of respondents: 1,000

Number of resp. by subgroups: varying



Projection*

All respondents	Interested in the theme	Visitors in the past
19.5 m	10.7 m	10.4 m
17.9 m	8.7 m	9.4 m
17.6 m	11.4 m	9.8 m
17.4 m	10.9 m	9.5 m
16.3 m	6.7 m	8.8 m

* Projection of the absolute volume of the attributed suitability of each theme (number of people).

► Note: Queried designation of Navarre for Spanish respondents = “Navarra”

Source: inspektour (international) GmbH, 2021

4.2 Supply: Supported theme suitability – *Polarity profile*

Supported theme suitability – Polarity profile

> Mean values (Scale from “5 = very suitable” to “1 = not at all suitable”)

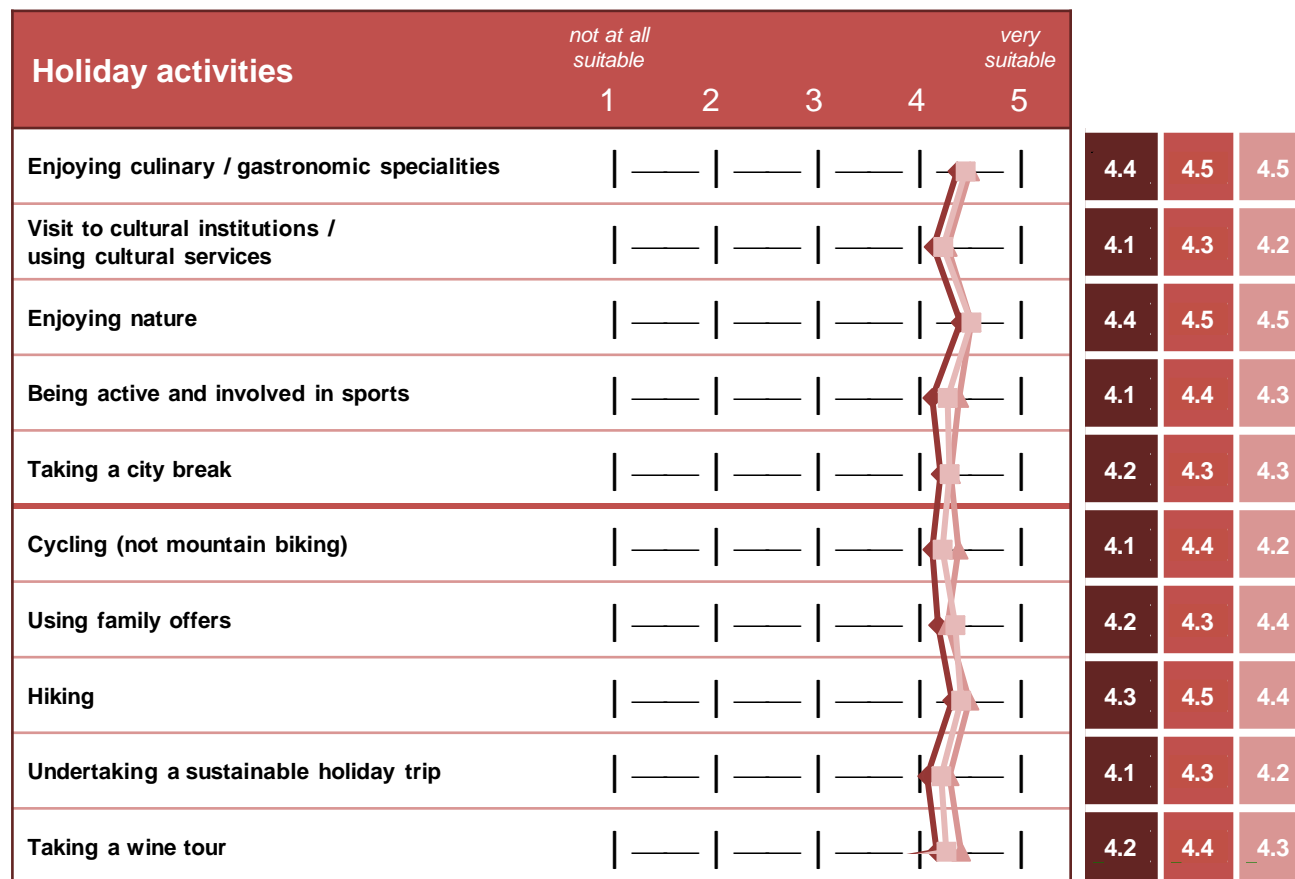
■ Navarra

Source market: Spain

Base: All respondents

Number of respondents: 1,000

Number of respondents by subgroups: varying



◆ All respondents

◀ Interested in the theme

■ Visitors in the past

► **Note:** Queried designation of Navarre for Spanish respondents = “Navarra”

Source: inspektour (international) GmbH, 2021

4.2 Supply: Supported theme suitability – Comparison by source market

Supported theme suitability of the general themes

> In your opinion, to what extent is the following tourist destination suitable for the holiday activities below (regardless of your own interest in the holiday activities)?

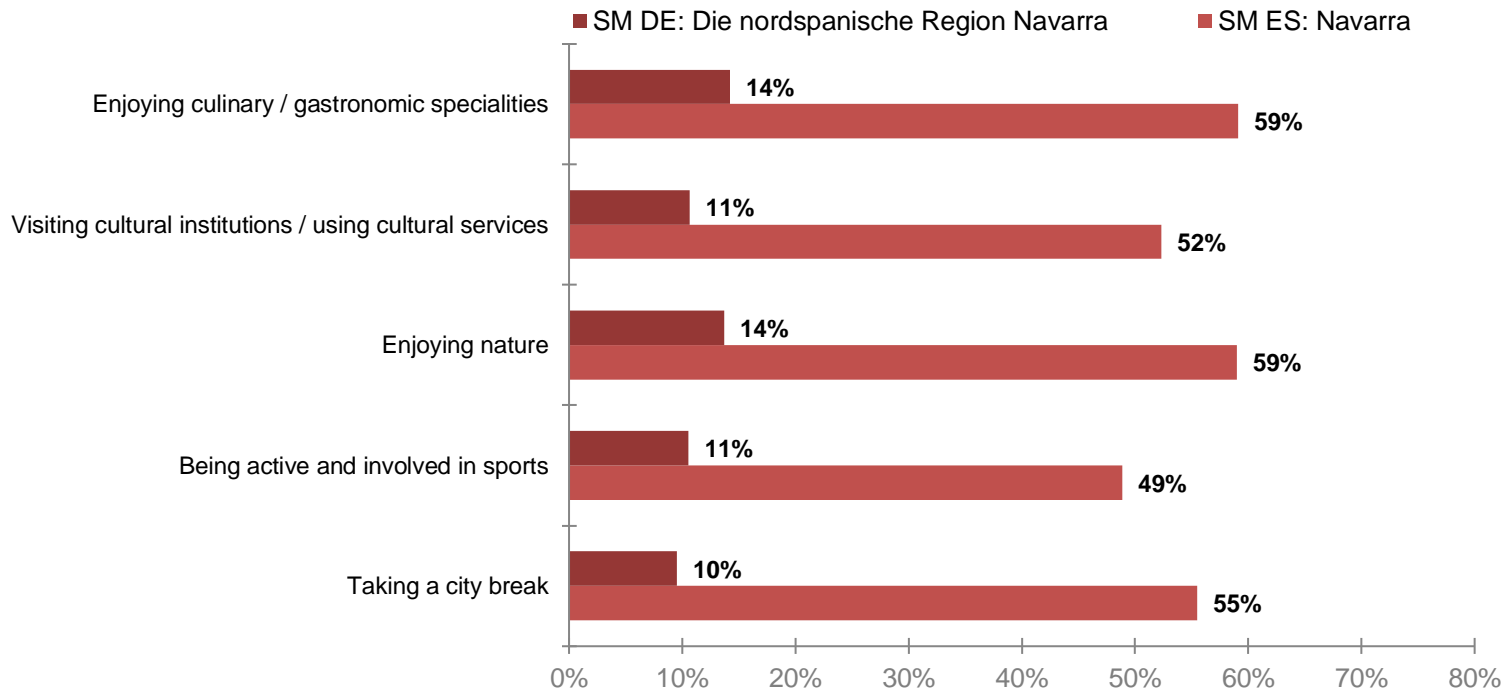
> Top-two-box on a scale from “5 = very suitable” to “1 = not at all suitable” (in % of respondents)

■ **Navarra**

Source market: Comparison

Base: All respondents

Number of respondents: min. 1,000



Source: inspektour (international) GmbH, 2021

4.2 Supply: Supported theme suitability – Comparison by source market

Supported theme suitability of the specific themes

> In your opinion, to what extent is the following tourist destination suitable for the holiday activities below (regardless of your own interest in the holiday activities)?

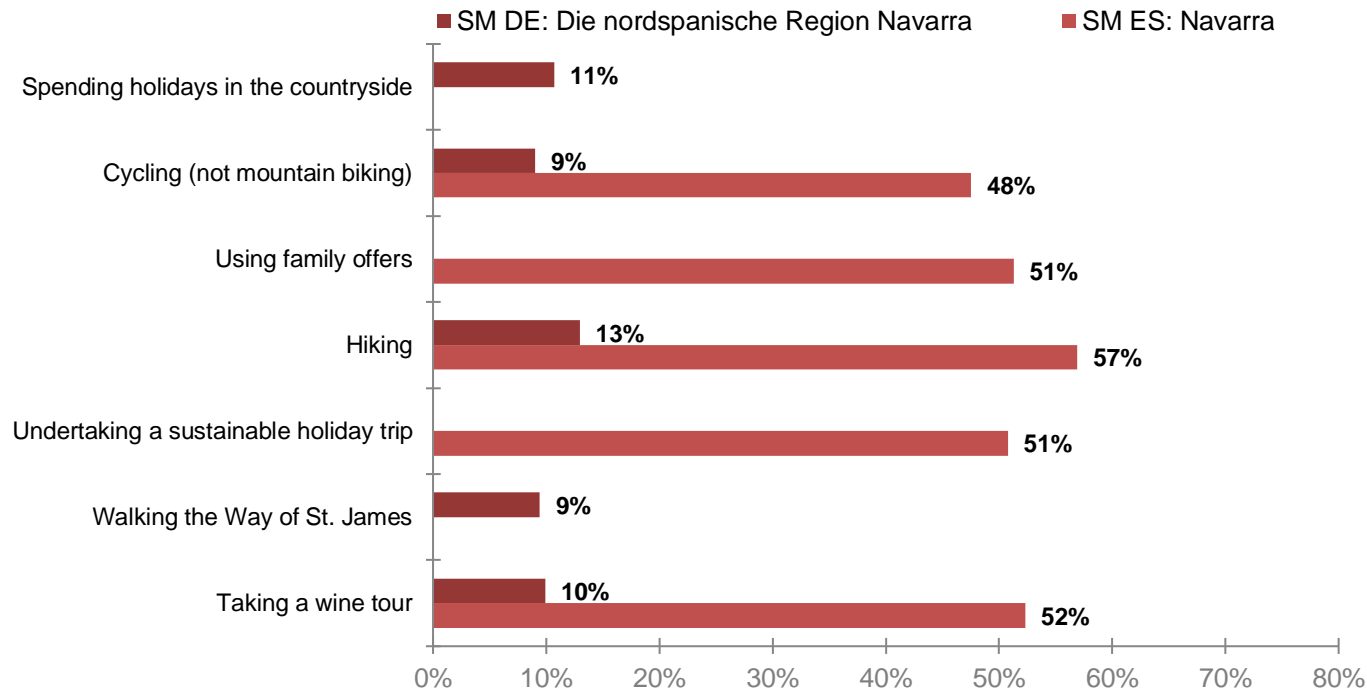
> Top-two-box on a scale from “5 = very suitable” to “1 = not at all suitable” (in % of respondents)

■ Navarra

Source market: Comparison

Base: All respondents

Number of respondents: min. 1,000



Source: inspektour (international) GmbH, 2021

► **Note:** In the case of values not shown, the respective specific theme was not surveyed in the relevant source market for the destination Navarre.

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4.3 Competition: Comparison with competitors – Category: All considered destinations

Source market: Spain

DESTINATION BRAND 21		Source market: Spain		Category: All considered destinations					
Navarra (N = 1,000)	Number of destinations in category	Base: All respondents				Base: Respondents with interest in the theme			
		own value		mean	rank	own value		mean	rank
		in %	projection*			in %	projection*		
Enjoying culinary / gastronomic specialties	10	59%	20.3 m	59%	6.	67%	16.9 m	66%	6.
Visit to cultural institutions / using cultural services		52%	17.9 m	59%	8.	60%	13.6 m	66%	9.
Enjoying nature		59%	20.2 m	55%	4.	64%	16.2 m	59%	4.
Being active and involved in sports		49%	16.8 m	46%	5.	56%	7.3 m	56%	6.
Taking a city break		55%	19.0 m	61%	8.	63%	16.6 m	68%	8.
Cycling (not mountain biking)	4	48%	16.3 m	49%	3.	56%	6.7 m	59%	3.
Using family offers	3	51%	17.6 m	56%	3.	56%	11.4 m	62%	3.
Hiking	4	57%	19.5 m	62%	4.	62%	10.7 m	68%	4.
Undertaking a sustainable holiday trip	7	51%	17.4 m	47%	3.	59%	10.9 m	57%	3.
Taking a wine tour	3	52%	17.9 m	42%	1.	58%	8.7 m	49%	2.

* Projection of the absolute volume for supported theme competence (number of people).

- **Note 1:** Last survey taken into consideration October until December 2021
 ► **Note 2:** Queried designation of Navarra for Spanish respondents = "Navarra"

Source: inspektour (international) GmbH, 2021

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4.4 Summary: Quadrant analysis

Quadrant analysis Navarra

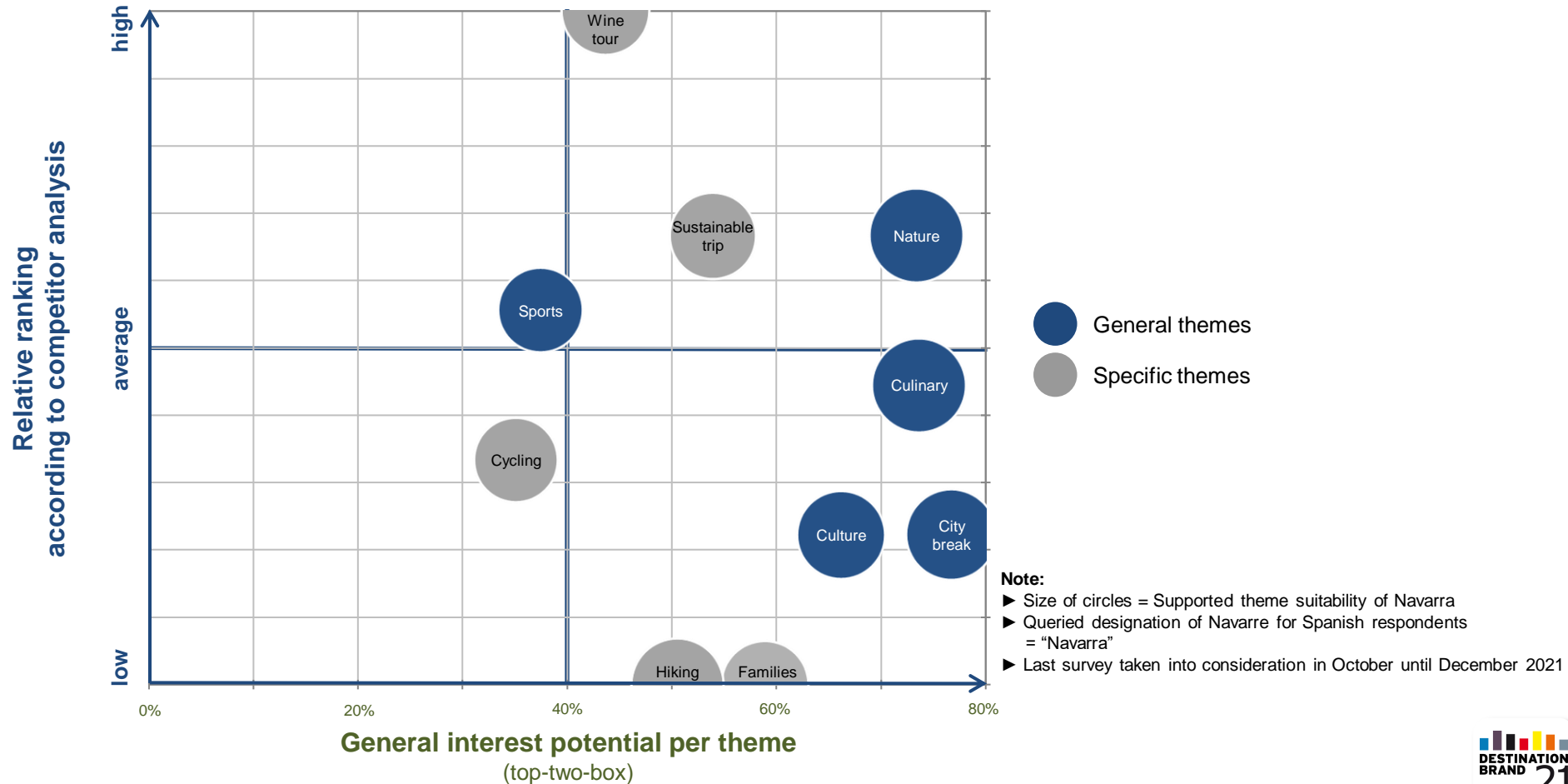
> Category for relative ranking according to competitor analysis:
All considered destinations (up to 10 tourist destinations per theme)

■ Navarra

Source market: Spain

Base: All respondents

Number of respondents: 1,000



Source: inspektour (international) GmbH, 2021

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5. Demand: General interest potential – *Holiday activities in detail*

Interest potential of the holiday activity: “Enjoying culinary / gastronomic specialities“

> The following question is about your general interest in touristic holiday activities, regardless of a specific tourist destination. How interested are you in pursuing the following touristic holiday activities as part of your holiday trip with at least one overnight stay?

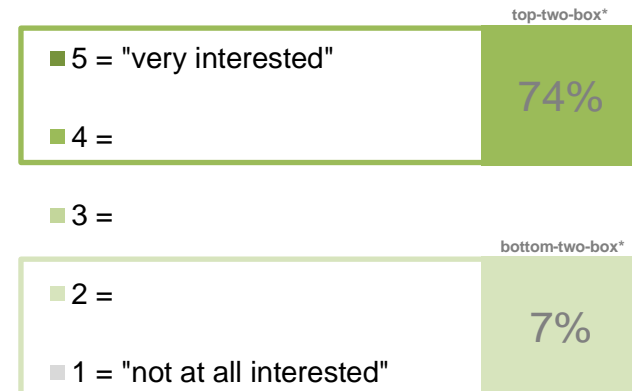
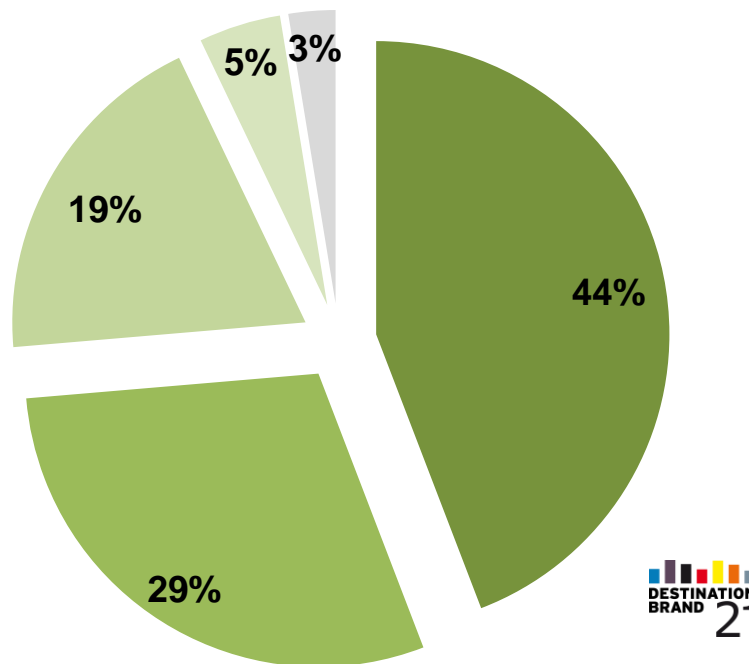
> Values (in % of respondents)

■ Culinary

Source market: Spain

Base: All respondents

Number of respondents: 1,000



Ø** = 4.1

5. Demand: General interest potential – *Holiday activities in detail*

Interest potential of the holiday activity:

“Visiting cultural institutions / using cultural services“

> The following question is about your general interest in touristic holiday activities, regardless of a specific tourist destination. How interested are you in pursuing the following touristic holiday activities as part of your holiday trip with at least one overnight stay?

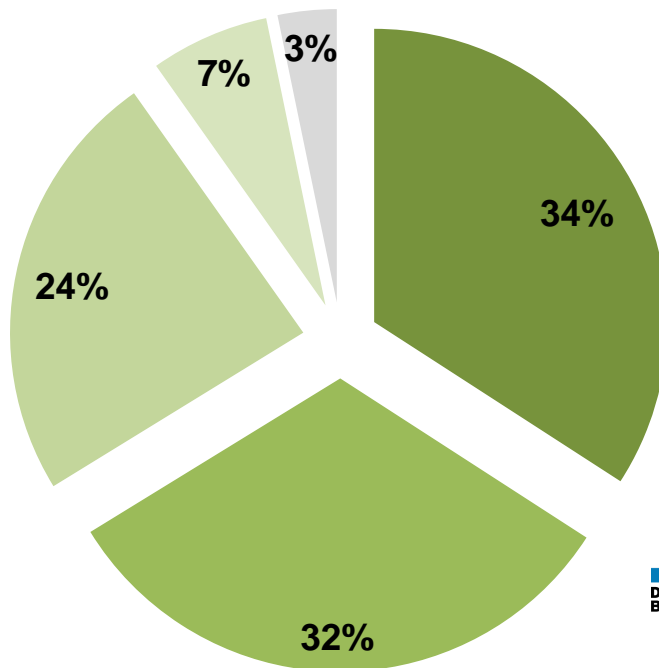
> Values (in % of respondents)

■ Culture

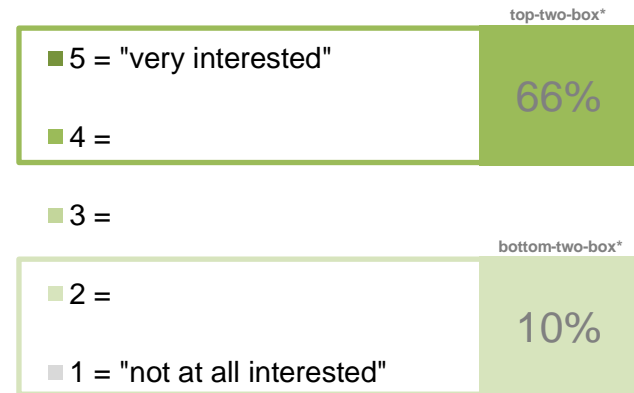
Source market: Spain

Base: All respondents

Number of respondents: 1,000



DESTINATION
BRAND 21



Ø** = 3.9

* Deviations of 1% from the sum of the individual values are possible due to rounding.
** Scale from "5 = very interested" to "1 = not at all interested"

5. Demand: General interest potential – *Holiday activities in detail*

Interest potential of the holiday activity: “Enjoying nature”

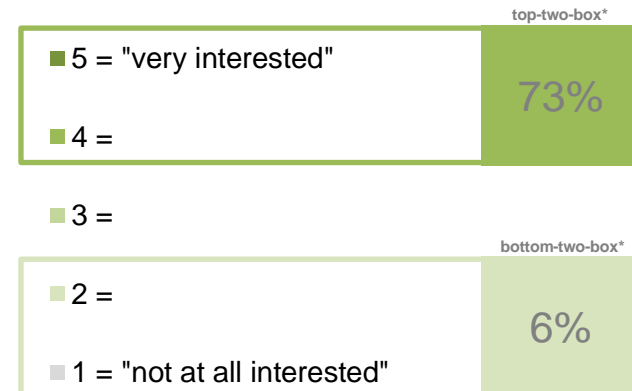
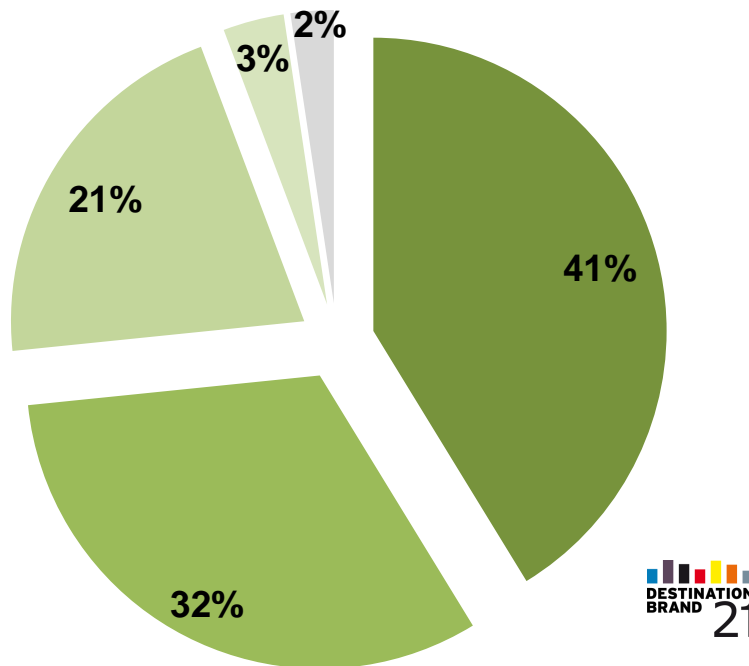
> The following question is about your general interest in touristic holiday activities, regardless of a specific tourist destination. How interested are you in pursuing the following touristic holiday activities as part of your holiday trip with at least one overnight stay?
> Values (in % of respondents)

■ Nature

Source market: Spain

Base: All respondents

Number of respondents: 1,000



Ø** = 4.1

* Deviations of 1% from the sum of the individual values are possible due to rounding.
** Scale from "5 = very interested" to "1 = not at all interested"

5. Demand: General interest potential – *Holiday activities in detail*

Interest potential of the holiday activity: “Being active and involved in sports”

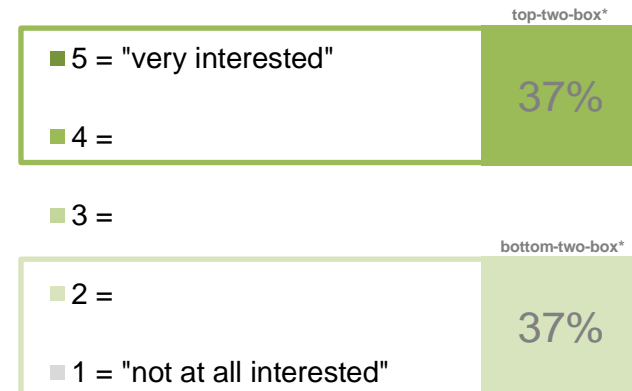
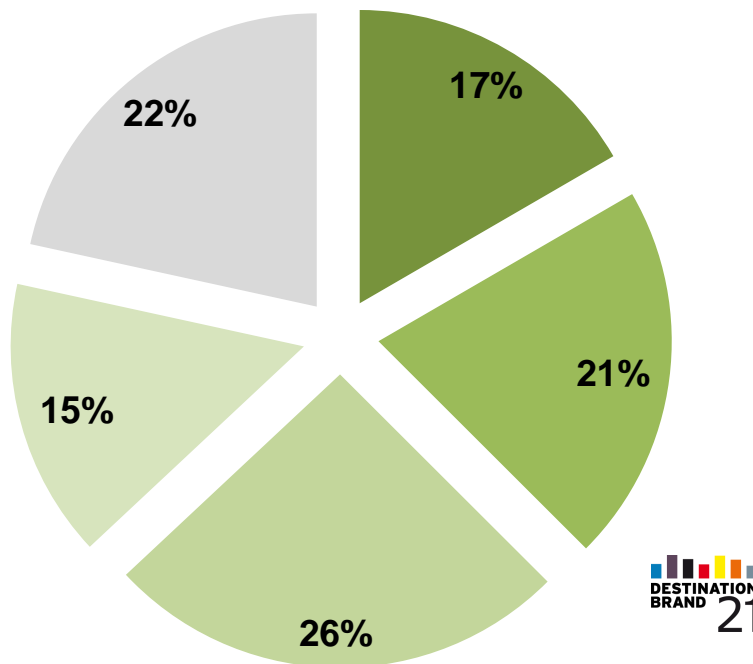
> The following question is about your general interest in touristic holiday activities, regardless of a specific tourist destination. How interested are you in pursuing the following touristic holiday activities as part of your holiday trip with at least one overnight stay?
> Values (in % of respondents)

■ Sports

Source market: Spain

Base: All respondents

Number of respondents: 1,000



Ø** = 3.0

* Deviations of 1% from the sum of the individual values are possible due to rounding.
** Scale from "5 = very interested" to "1 = not at all interested"

Source: inspektour (international) GmbH, 2021

5. Demand: General interest potential – *Holiday activities in detail*

Interest potential of the holiday activity:

“Taking a city break”

> The following question is about your general interest in touristic holiday activities, regardless of a specific tourist destination. How interested are you in pursuing the following touristic holiday activities as part of your holiday trip with at least one overnight stay?

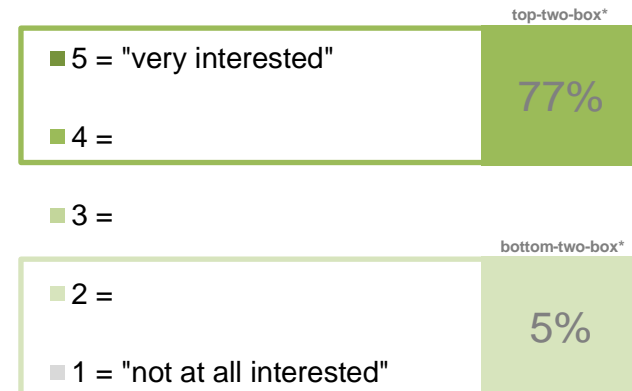
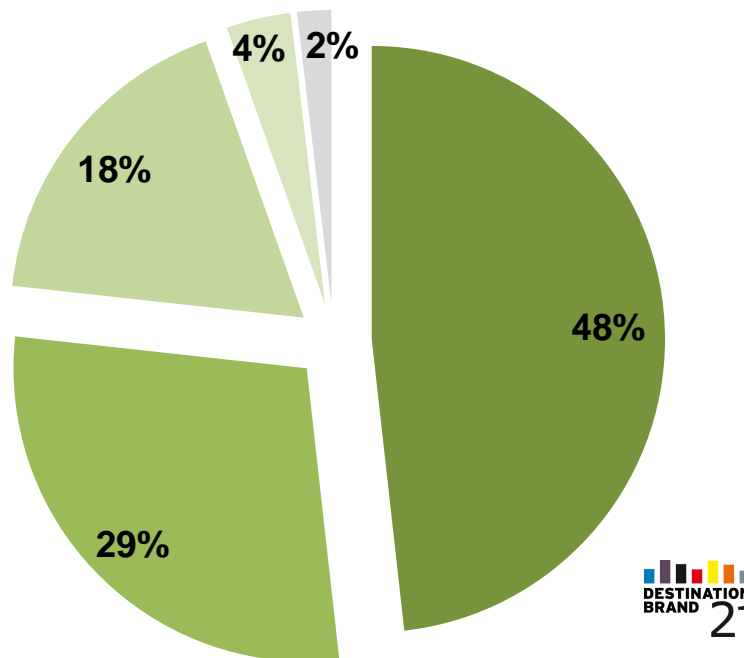
> Values (in % of respondents)

■ City break

Source market: Spain

Base: All respondents

Number of respondents: 1,000



Ø** = 4.2

5. Demand: General interest potential – *Holiday activities in detail*

Interest potential of the holiday activity: “Cycling (not mountain biking)”

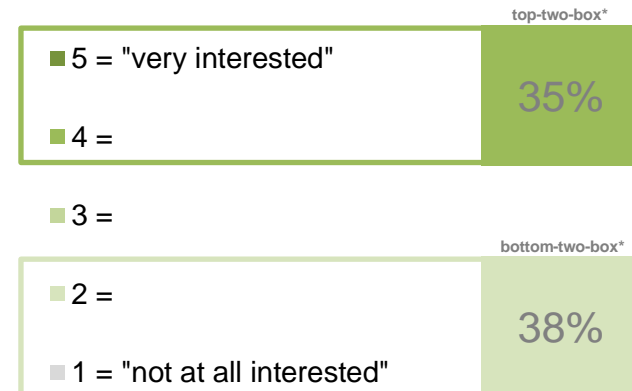
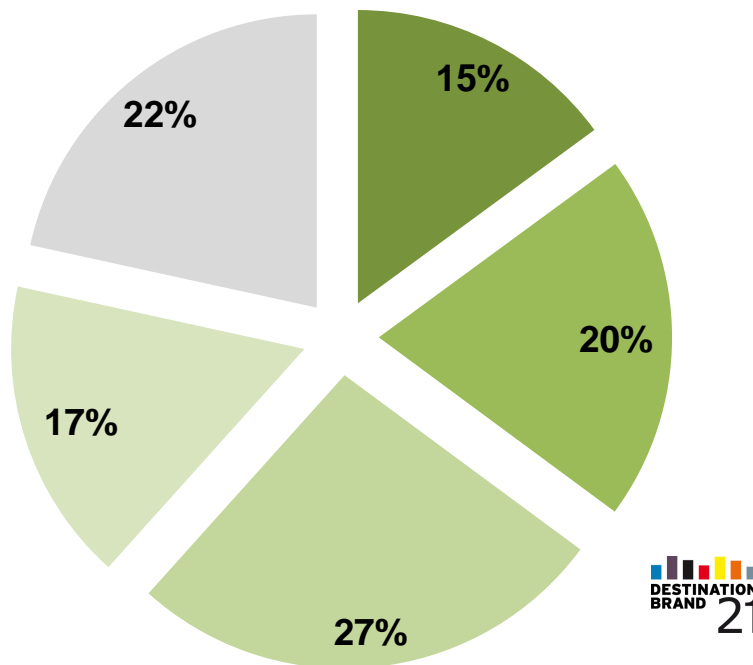
> The following question is about your general interest in touristic holiday activities, regardless of a specific tourist destination. How interested are you in pursuing the following touristic holiday activities as part of your holiday trip with at least one overnight stay?
> Values (in % of respondents)

■ Cycling

Source market: Spain

Base: All respondents

Number of respondents: 1,000



Ø** = 2.9

* Deviations of 1% from the sum of the individual values are possible due to rounding.
** Scale from "5 = very interested" to "1 = not at all interested"

5. Demand: General interest potential – *Holiday activities in detail*

Interest potential of the holiday activity:

“Using family offers”

> The following question is about your general interest in touristic holiday activities, regardless of a specific tourist destination. How interested are you in pursuing the following touristic holiday activities as part of your holiday trip with at least one overnight stay?

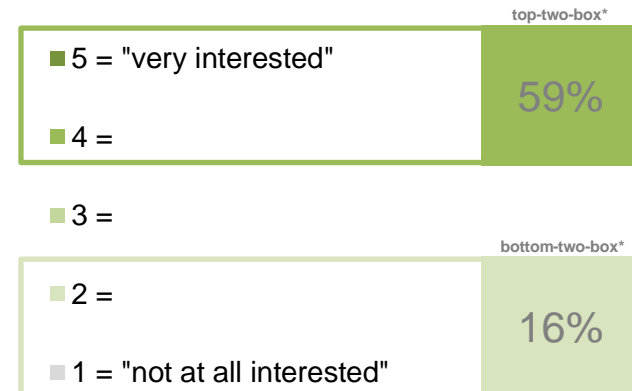
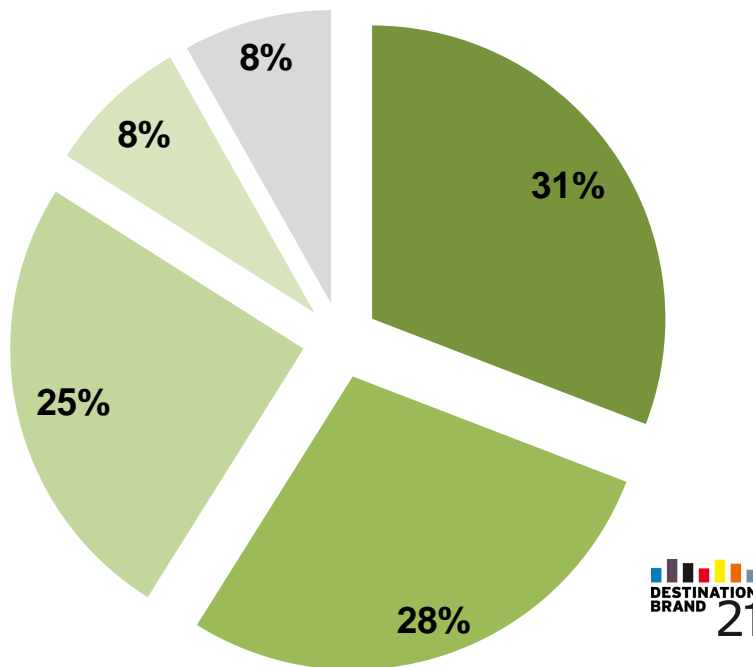
> Values (in % of respondents)

■ Families

Source market: Spain

Base: All respondents

Number of respondents: 1,000



Ø** = 3.7

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

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

5. Demand: General interest potential – *Holiday activities in detail*

Interest potential of the holiday activity:

“Hiking”

> The following question is about your general interest in touristic holiday activities, regardless of a specific tourist destination. How interested are you in pursuing the following touristic holiday activities as part of your holiday trip with at least one overnight stay?

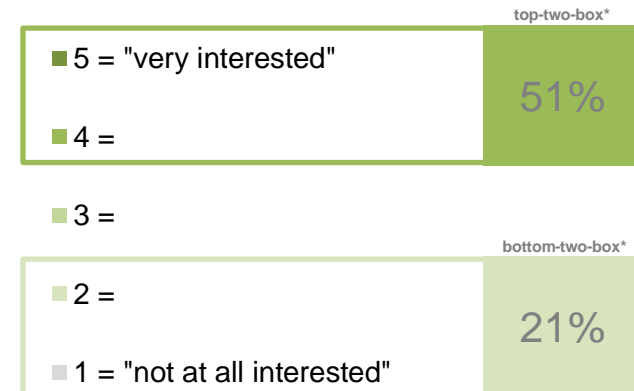
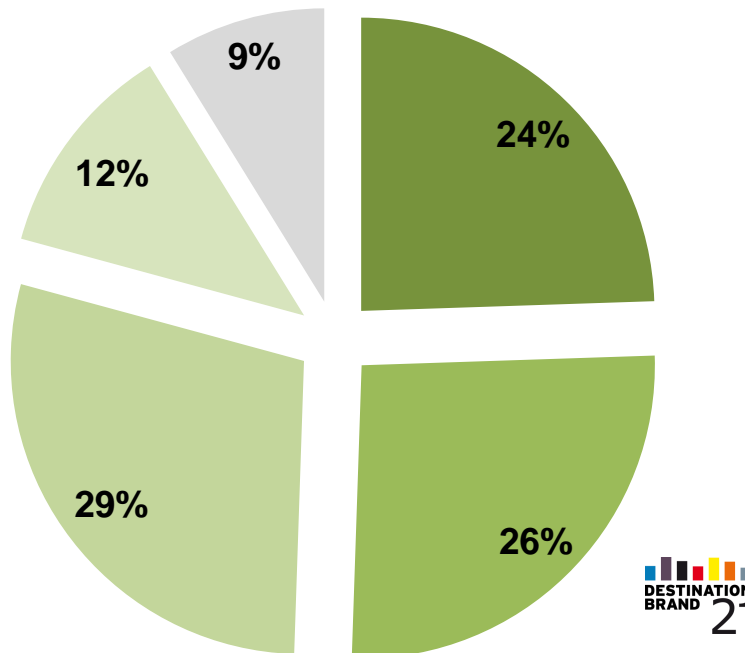
> Values (in % of respondents)

■ Hiking

Source market: Spain

Base: All respondents

Number of respondents: 1,000



Ø** = 3.5

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

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

5. Demand: General interest potential – *Holiday activities in detail*

Interest potential of the holiday activity: “Undertaking a sustainable holiday trip (nature preserving / environmentally friendly, economically and socially fair)”

> The following question is about your general interest in touristic holiday activities, regardless of a specific tourist destination. How interested are you in pursuing the following touristic holiday activities as part of your holiday trip with at least one overnight stay?

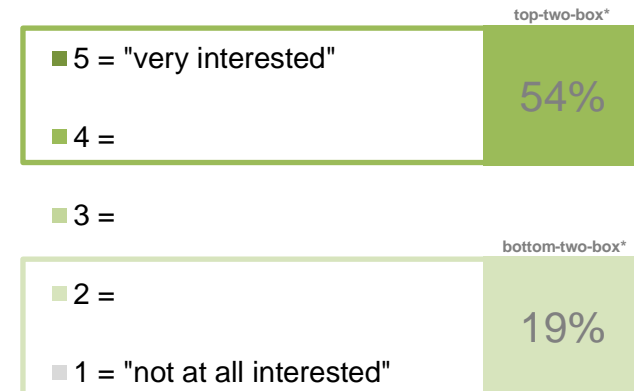
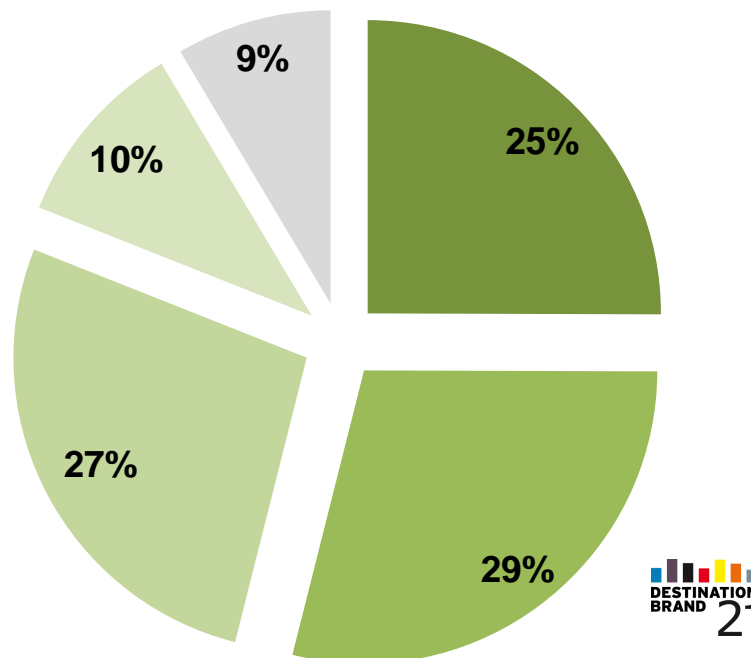
> Values (in % of respondents)

■ Sustainable trip

Source market: Spain

Base: All respondents

Number of respondents: 1,000



Ø** = 3.5

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

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

5. Demand: General interest potential – *Holiday activities in detail*

Interest potential of the holiday activity: “Taking a wine tour (e.g., wine tasting, visiting wine festivals, vineyard walks, participating in the grape harvest)”

> The following question is about your general interest in touristic holiday activities, regardless of a specific tourist destination. How interested are you in pursuing the following touristic holiday activities as part of your holiday trip with at least one overnight stay?

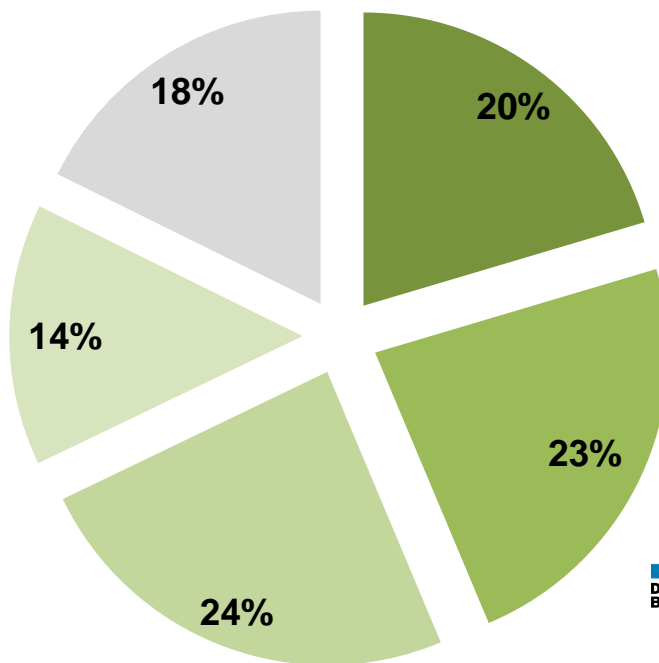
> Values (in % of respondents)

■ *Wine tour*

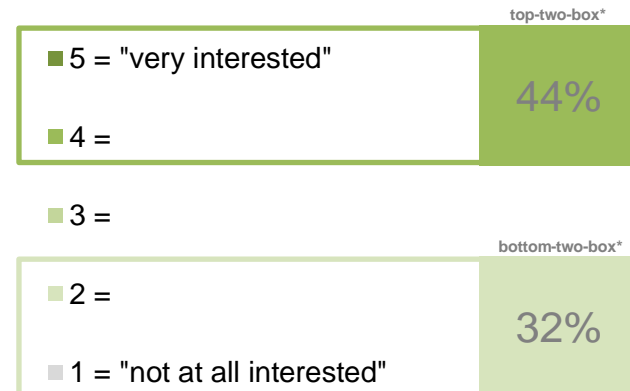
Source market: Spain

Base: All respondents

Number of respondents: 1,000



DESTINATION
BRAND 21



Ø** = 3.1

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

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

Outline

1 GENERAL OVERVIEW OF THE STUDY SERIES DESTINATION BRAND

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4 OVERVIEW OF KEY RESULTS: THREE-DIMENSIONAL THEME COMPETENCE ANALYSIS

5 DEMAND: GENERAL INTEREST POTENTIAL IN DETAIL

6 SUPPLY: SUPPORTED THEME SUITABILITY IN DETAIL

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6.1 Supply: Supported theme suitability – Results of univariate analysis

Supported theme suitability for the holiday activity: “Enjoying culinary / gastronomic specialities”

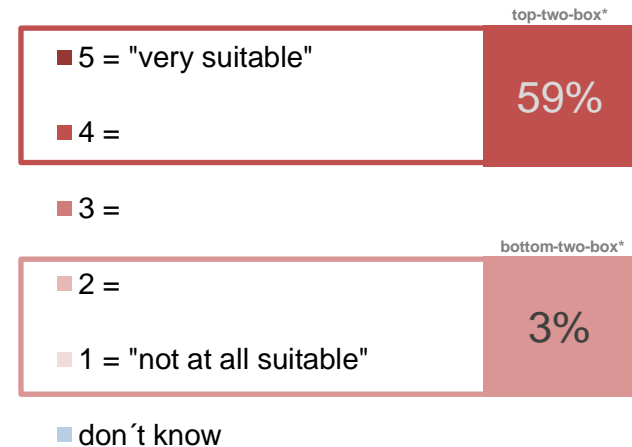
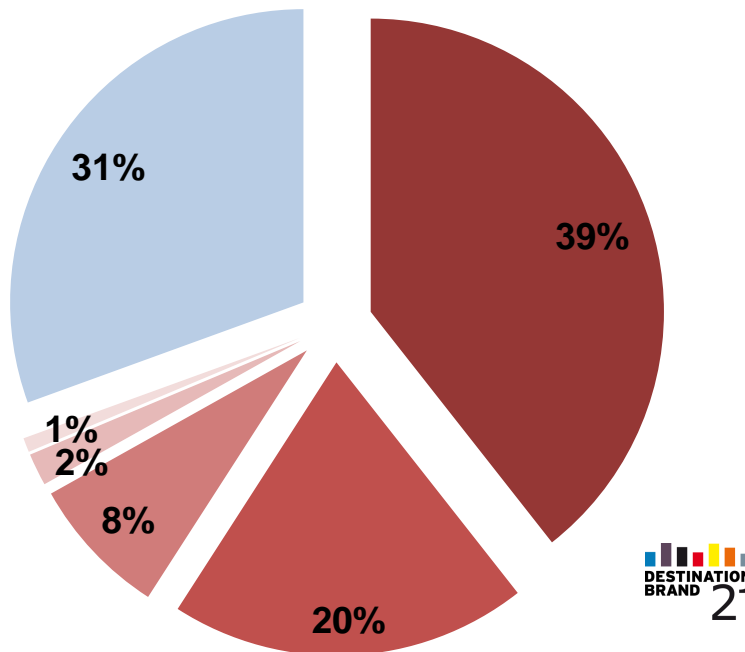
> In your opinion, to what extent is the following domestic tourist destination suitable for the holiday activities below (regardless of your own interest in the holiday activities)?
> Values (in % of respondents)

■ **Navarra**

Source market: Spain

Base: All respondents

Number of respondents: 1,000



Ø** = 4.4

► **Note:** Queried designation of Navarra for Spanish respondents = "Navarra"

Source: inspektour (international) GmbH, 2021

* Deviations of 1% from the sum of the individual values are possible due to rounding.
** Scale from "5 = very suitable" to "1 = not at all suitable"

6.1 Supply: Supported theme suitability – Results of univariate analysis

Supported theme suitability for the holiday activity: “Visit to cultural institutions / using cultural services”

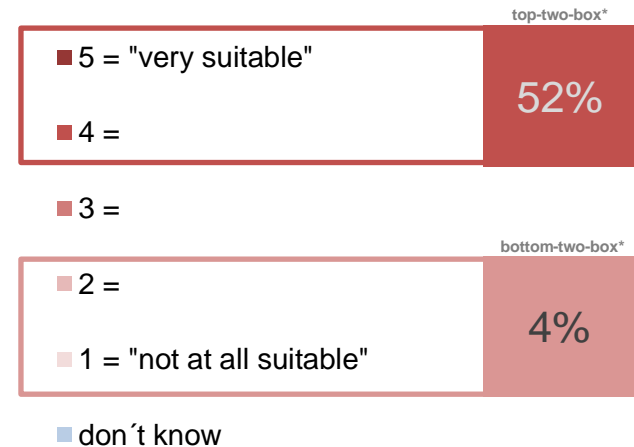
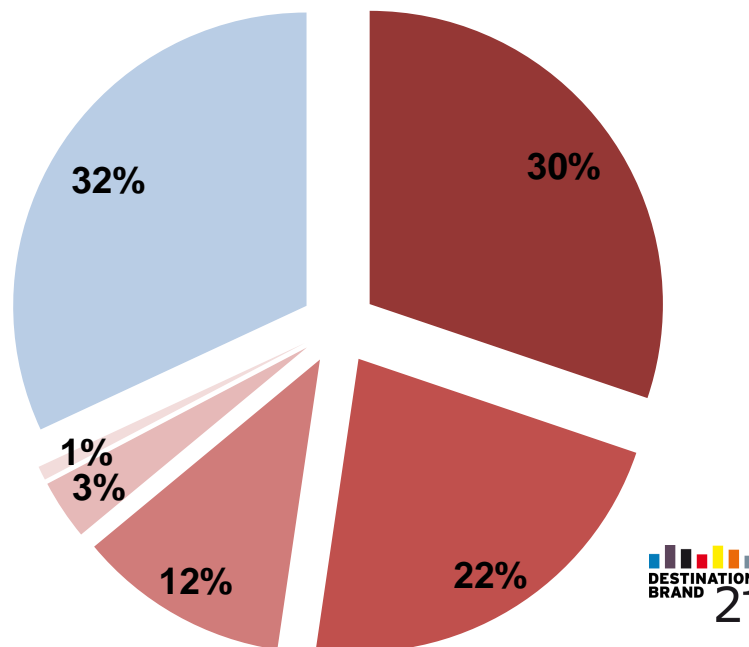
> In your opinion, to what extent is the following domestic tourist destination suitable for the holiday activities below (regardless of your own interest in the holiday activities)?
> Values (in % of respondents)

■ **Navarra**

Source market: Spain

Base: All respondents

Number of respondents: 1,000



Ø** = 4.1

► **Note:** Queried designation of Navarra for Spanish respondents = "Navarra"

Source: inspektour (international) GmbH, 2021

* Deviations of 1% from the sum of the individual values are possible due to rounding.
** Scale from "5 = very suitable" to "1 = not at all suitable"

6.1 Supply: Supported theme suitability – Results of univariate analysis

Supported theme suitability for the holiday activity: “Enjoying nature”

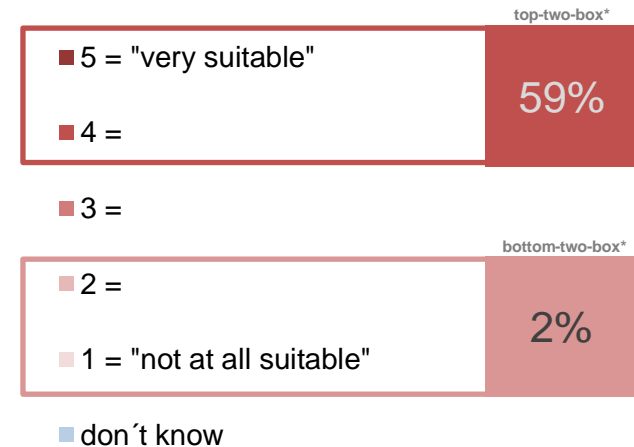
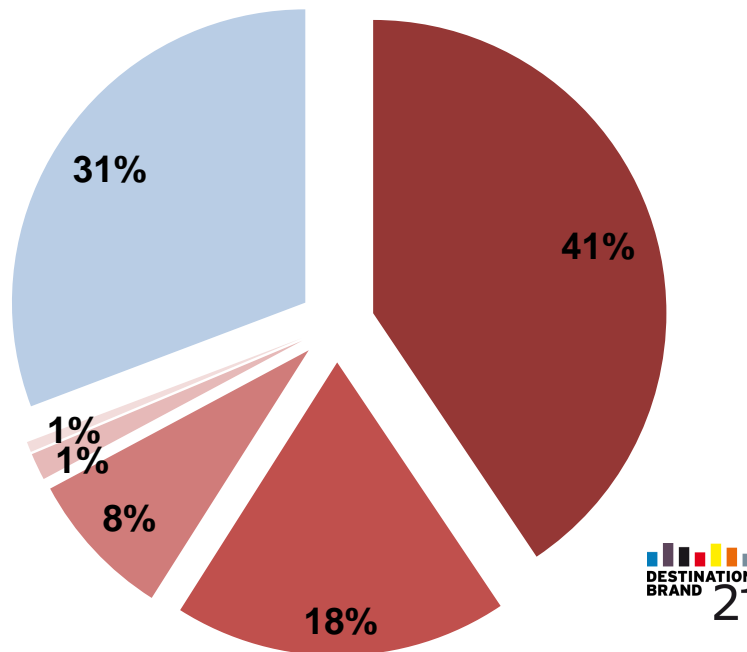
> In your opinion, to what extent is the following domestic tourist destination suitable for the holiday activities below (regardless of your own interest in the holiday activities)?
> Values (in % of respondents)

■ **Navarra**

Source market: Spain

Base: All respondents

Number of respondents: 1,000



Ø** = 4.4

► **Note:** Queried designation of Navarra for Spanish respondents = "Navarra"

Source: inspektour (international) GmbH, 2021

* Deviations of 1% from the sum of the individual values are possible due to rounding.
** Scale from "5 = very suitable" to "1 = not at all suitable"

6.1 Supply: Supported theme suitability – Results of univariate analysis

Supported theme suitability for the holiday activity: “Being active and involved in sports”

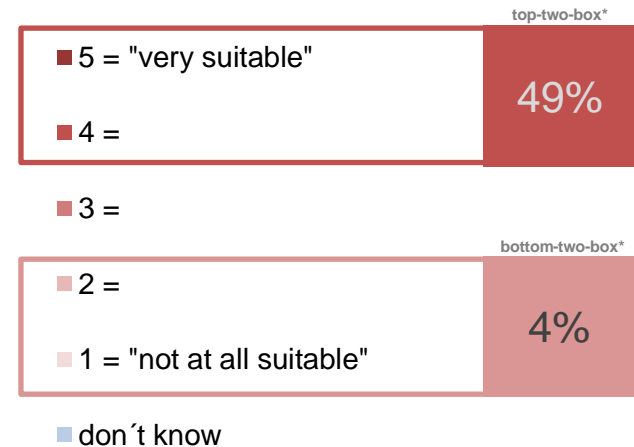
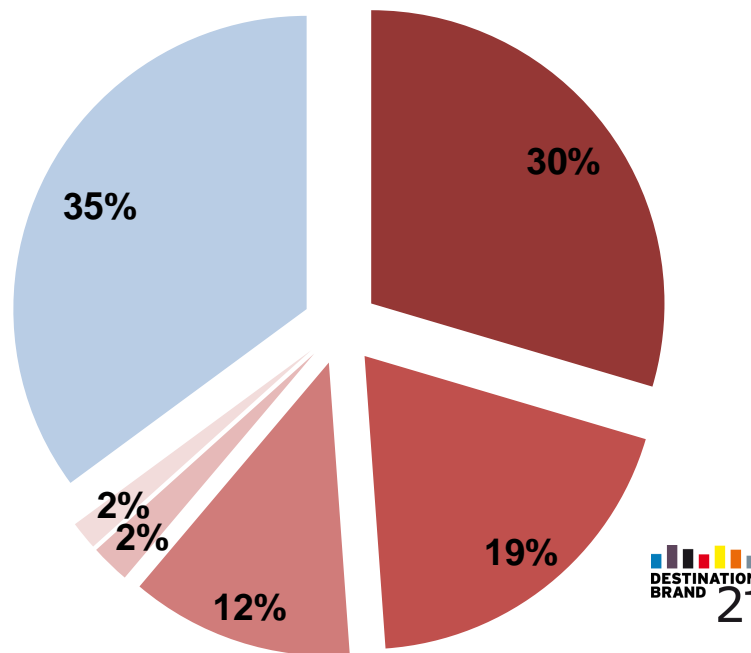
> In your opinion, to what extent is the following domestic tourist destination suitable for the holiday activities below (regardless of your own interest in the holiday activities)?
> Values (in % of respondents)

■ **Navarra**

Source market: Spain

Base: All respondents

Number of respondents: 1,000



Ø** = 4.1

► **Note:** Queried designation of Navarra for Spanish respondents = "Navarra"

Source: inspektour (international) GmbH, 2021

* Deviations of 1% from the sum of the individual values are possible due to rounding.
** Scale from "5 = very suitable" to "1 = not at all suitable"

6.1 Supply: Supported theme suitability – Results of univariate analysis

Supported theme suitability for the holiday activity: “Taking a city break”

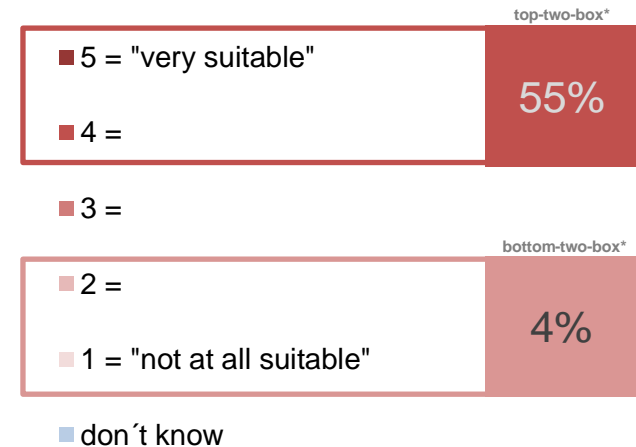
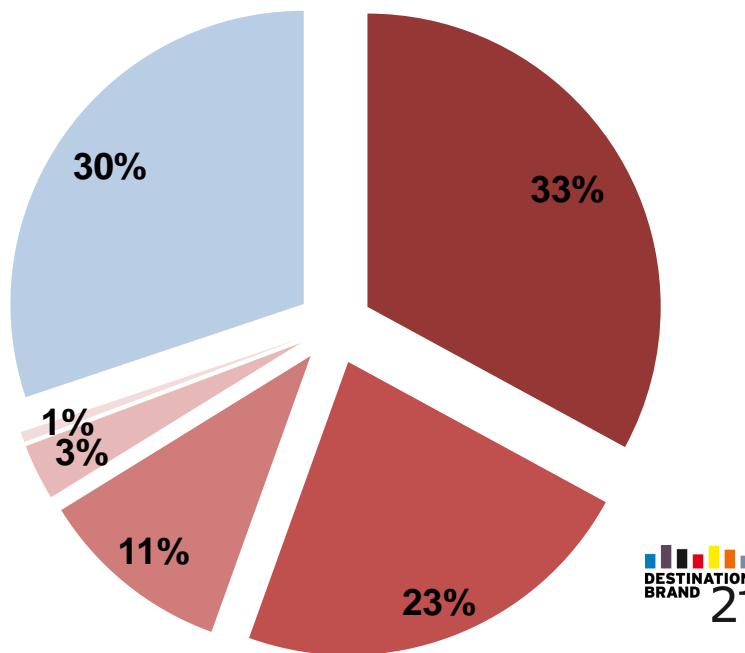
> In your opinion, to what extent is the following domestic tourist destination suitable for the holiday activities below (regardless of your own interest in the holiday activities)?
> Values (in % of respondents)

■ **Navarra**

Source market: Spain

Base: All respondents

Number of respondents: 1,000



Ø** = 4.2

► **Note:** Queried designation of Navarra for Spanish respondents = "Navarra"

Source: inspektour (international) GmbH, 2021

* Deviations of 1% from the sum of the individual values are possible due to rounding.
** Scale from "5 = very suitable" to "1 = not at all suitable"

6.1 Supply: Supported theme suitability – Results of univariate analysis

Supported theme suitability for the holiday activity: “Cycling (not mountain biking)”

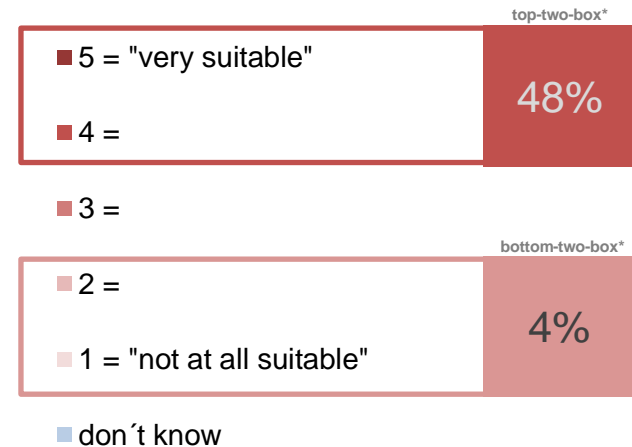
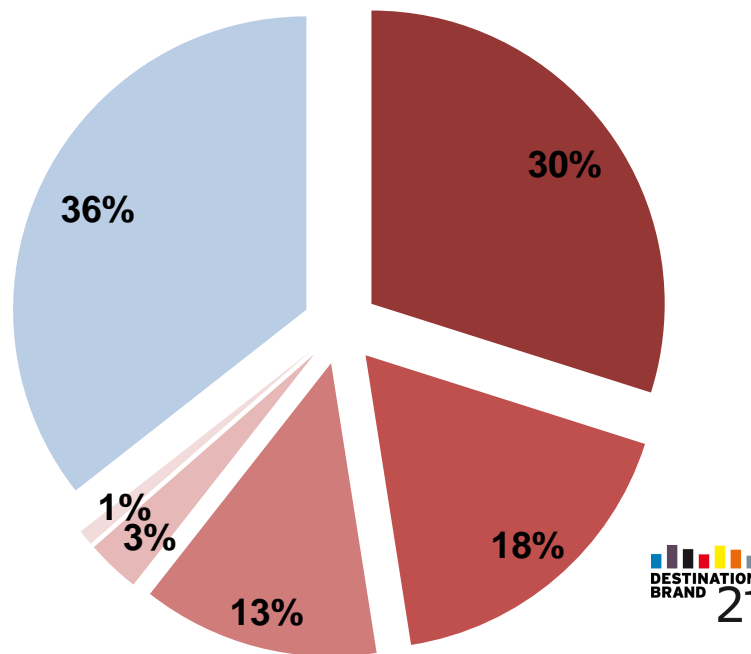
> In your opinion, to what extent is the following domestic tourist destination suitable for the holiday activities below (regardless of your own interest in the holiday activities)?
> Values (in % of respondents)

■ **Navarra**

Source market: Spain

Base: All respondents

Number of respondents: 1,000



Ø** = 4.1

► **Note:** Queried designation of Navarra for Spanish respondents = "Navarra"

Source: inspektour (international) GmbH, 2021

* Deviations of 1% from the sum of the individual values are possible due to rounding.
** Scale from "5 = very suitable" to "1 = not at all suitable"

6.1 Supply: Supported theme suitability – Results of univariate analysis

Supported theme suitability for the holiday activity: “Using family offers”

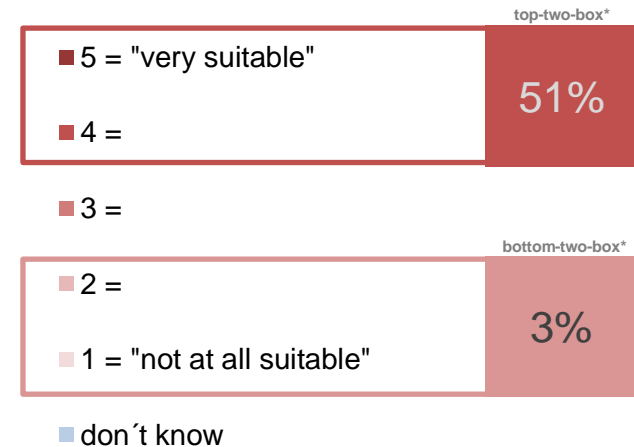
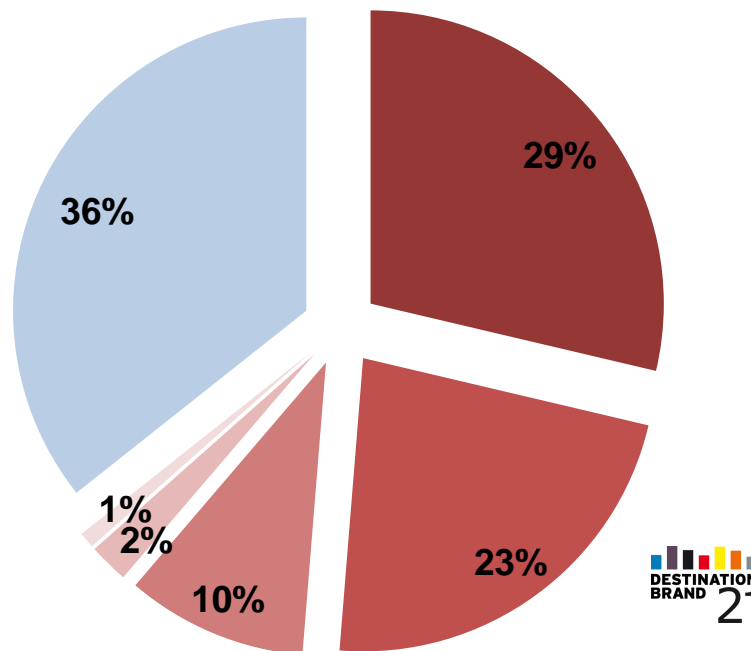
> In your opinion, to what extent is the following domestic tourist destination suitable for the holiday activities below (regardless of your own interest in the holiday activities)?
> Values (in % of respondents)

■ **Navarra**

Source market: Spain

Base: All respondents

Number of respondents: 1,000



Ø** = 4.2

► **Note:** Queried designation of Navarra for Spanish respondents = "Navarra"

Source: inspektour (international) GmbH, 2021

* Deviations of 1% from the sum of the individual values are possible due to rounding.
** Scale from "5 = very suitable" to "1 = not at all suitable"

6.1 Supply: Supported theme suitability – Results of univariate analysis

Supported theme suitability for the holiday activity: “Hiking”

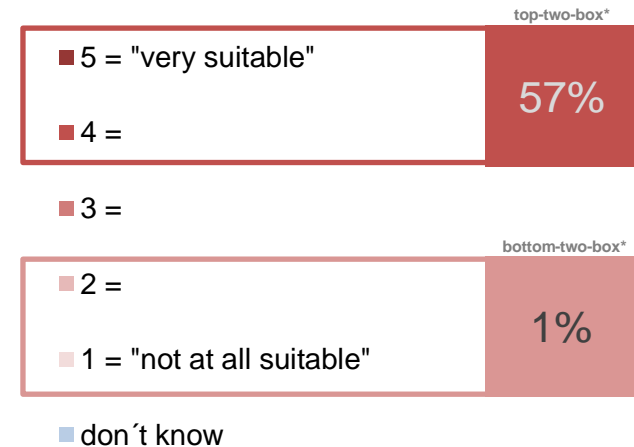
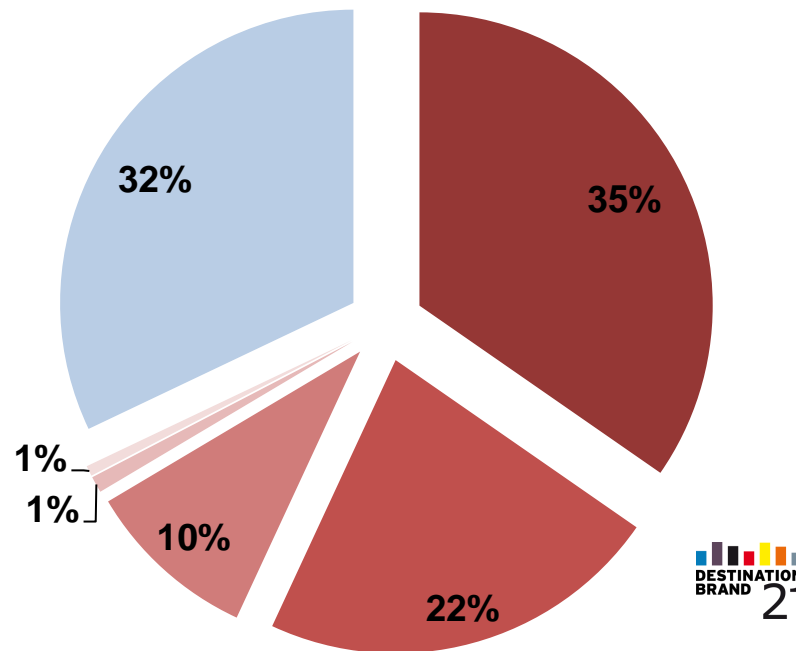
> In your opinion, to what extent is the following domestic tourist destination suitable for the holiday activities below (regardless of your own interest in the holiday activities)?
> Values (in % of respondents)

■ **Navarra**

Source market: Spain

Base: All respondents

Number of respondents: 1,000



Ø** = 4.3

► **Note:** Queried designation of Navarra for Spanish respondents = “Navarra”

Source: inspektour (international) GmbH, 2021

* Deviations of 1% from the sum of the individual values are possible due to rounding.
** Scale from “5 = very suitable” to “1 = not at all suitable”

6.1 Supply: Supported theme suitability – Results of univariate analysis

Supported theme suitability for the holiday activity: “Undertaking a sustainable holiday trip (nature preserving / environmentally friendly, economically and socially fair)”

> In your opinion, to what extent is the following domestic tourist destination suitable for the holiday activities below (regardless of your own interest in the holiday activities)?

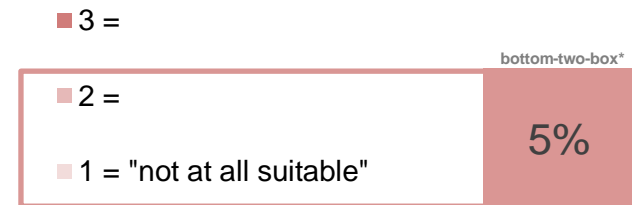
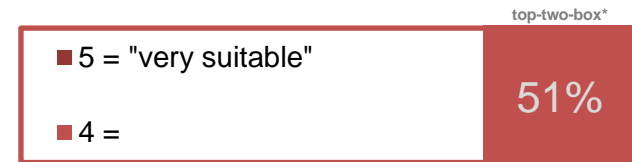
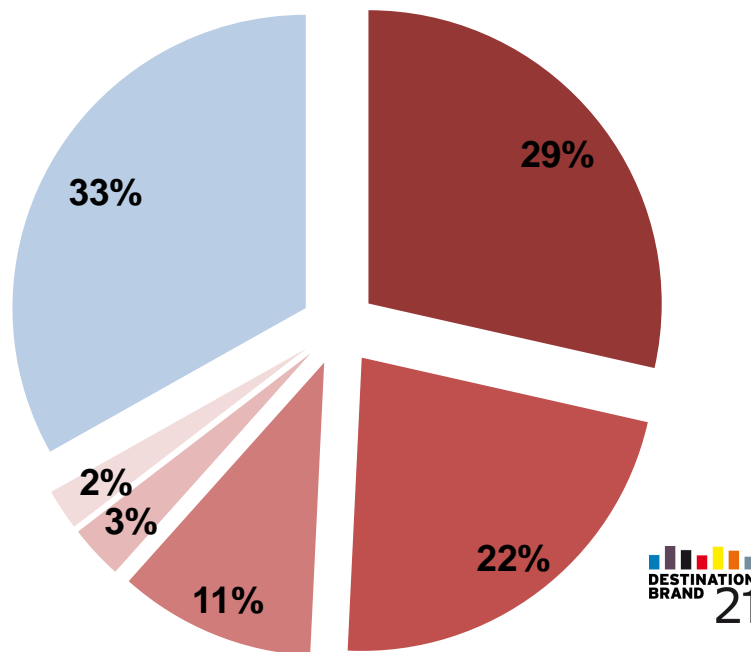
> Values (in % of respondents)

■ **Navarra**

Source market: Spain

Base: All respondents

Number of respondents: 1,000



■ don't know

Ø** = 4.1

► **Note:** Queried designation of Navarra for Spanish respondents = "Navarra"

Source: inspektour (international) GmbH, 2021

* Deviations of 1% from the sum of the individual values are possible due to rounding.
** Scale from "5 = very suitable" to "1 = not at all suitable"

6.1 Supply: Supported theme suitability – Results of univariate analysis

Supported theme suitability for the holiday activity: “Taking a wine tour (e.g., wine tasting, visiting wine festivals, vineyard walks, participating in the grape harvest)”

> In your opinion, to what extent is the following domestic tourist destination suitable for the holiday activities below (regardless of your own interest in the holiday activities)?

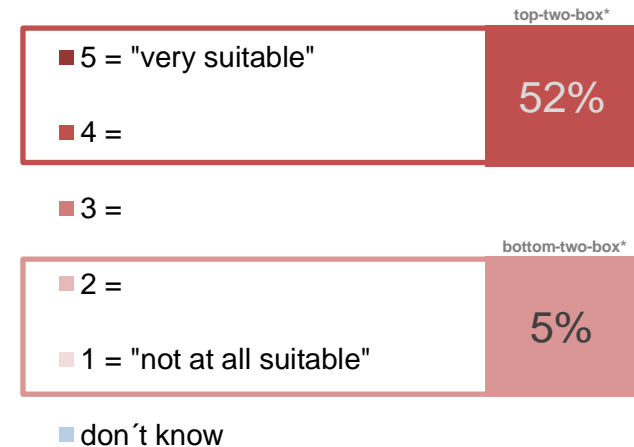
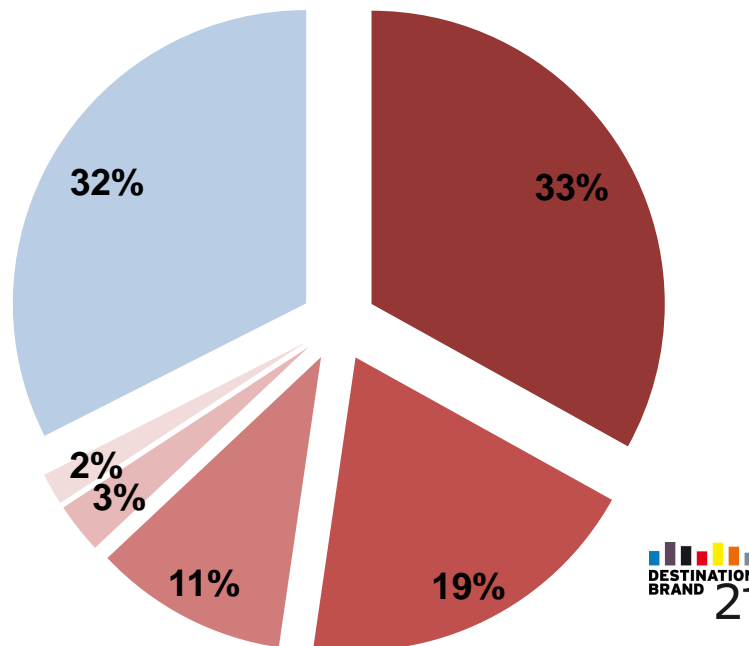
> Values (in % of respondents)

■ **Navarra**

Source market: Spain

Base: All respondents

Number of respondents: 1,000



Ø** = 4.2

► **Note:** Queried designation of Navarra for Spanish respondents = “Navarra”

Source: inspektour (international) GmbH, 2021

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

** Scale from “5 = very suitable” to “1 = not at all suitable”

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1 GENERAL OVERVIEW OF THE STUDY SERIES DESTINATION BRAND

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6.2 Supply: Supported theme suitability – Sociodemographic differentiation

Supported theme suitability of the general themes

> In your opinion, to what extent is the following domestic tourist destination suitable for the holiday activities below (regardless of your own interest in the holiday activities)?

> Top-two-box on a scale from “5 = very suitable” to “1 = not at all suitable” (in % of respondents)

■ Navarra

Source market: Spain

Sociodemography: Sex

Base: All respondents

Number of respondents: 1,000

General themes	total	Sex		Significance* (Kruskal-Wallis-test)
		male	female	
Enjoying culinary / gastronomic specialties	59%	54%	64%	n.s.
Visit to cultural institutions / using cultural services	52%	49%	56%	n.s.
Enjoying nature	59%	55%	63%	n.s.
Being active and involved in sports	49%	46%	52%	n.s.
Taking a city break	55%	50%	61%	sig.



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

► Note: Queried designation of Navarre for Spanish respondents = “Navarra”

6.2 Supply: Supported theme suitability – Sociodemographic differentiation

Supported theme suitability of the specific themes

> In your opinion, to what extent is the following domestic tourist destination suitable for the holiday activities below (regardless of your own interest in the holiday activities)?

> Top-two-box on a scale from “5 = very suitable“ to “1 = not at all suitable” (in % of respondents)

■ Navarra

Source market: Spain

Sociodemography: Sex

Base: All respondents

Number of respondents: 1,000

Specific themes	total	Sex		Significance* (Kruskal-Wallis-test)
		male	female	
Cycling (not mountain biking)	48%	46%	49%	n.s.
Using family offers	51%	49%	54%	n.s.
Hiking	57%	53%	61%	n.s.
Undertaking a sustainable holiday trip	51%	47%	55%	n.s.
Taking a wine tour	52%	47%	58%	n.s.



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

► Note: Queried designation of Navarre for Spanish respondents = “Navarra”

6.2 Supply: Supported theme suitability – Sociodemographic differentiation

Supported theme suitability of the general themes

> In your opinion, to what extent is the following domestic tourist destination suitable for the holiday activities below (regardless of your own interest in the holiday activities)?

> Top-two-box on a scale from “5 = very suitable” to “1 = not at all suitable” (in % of respondents)

■ Navarra

Source market: Spain

Sociodemography: Age group

Base: All respondents

Number of respondents: 1,000

General themes	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.	
Enjoying culinary / gastronomic specialties	59%	45%	52%	61%	66%	70%	59%	sig.
Visit to cultural institutions / using cultural services	52%	38%	54%	51%	58%	61%	51%	sig.
Enjoying nature	59%	44%	49%	61%	66%	71%	62%	sig.
Being active and involved in sports	49%	39%	50%	51%	51%	51%	45%	sig.
Taking a city break	55%	41%	54%	56%	59%	65%	58%	sig.



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

► Note: Queried designation of Navarre for Spanish respondents = “Navarra”

6.2 Supply: Supported theme suitability – Sociodemographic differentiation

Supported theme suitability of the specific themes

> In your opinion, to what extent is the following domestic tourist destination suitable for the holiday activities below (regardless of your own interest in the holiday activities)?

> Top-two-box on a scale from “5 = very suitable” to “1 = not at all suitable” (in % of respondents)

■ Navarra

Source market: Spain

Sociodemography: Age group

Base: All respondents

Number of respondents: 1,000

Specific themes	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.	
Cycling (not mountain biking)	48%	35%	44%	50%	54%	51%	49%	sig.
Using family offers	51%	39%	51%	55%	55%	55%	48%	sig.
Hiking	57%	46%	50%	60%	64%	60%	61%	sig.
Undertaking a sustainable holiday trip	51%	35%	46%	51%	58%	60%	56%	sig.
Taking a wine tour	52%	33%	48%	54%	62%	62%	51%	sig.



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

► Note: Queried designation of Navarre for Spanish respondents = “Navarra”

6.2 Supply: Supported theme suitability – Sociodemographic differentiation

Supported theme suitability of the general themes

> In your opinion, to what extent is the following domestic tourist destination suitable for the holiday activities below (regardless of your own interest in the holiday activities)?

> Top-two-box on a scale from “5 = very suitable” to “1 = not at all suitable” (in % of respondents)

■ Navarra

Source market: Spain

Sociodemography: Formal education

Base: All respondents

Number of respondents: 1,000

General themes	total	Formal education (3% 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	
Enjoying culinary / gastronomic specialties	59%	46%	53%	59%	62%	n.s.
Visit to cultural institutions / using cultural services	52%	38%	49%	51%	56%	n.s.
Enjoying nature	59%	43%	52%	59%	63%	n.s.
Being active and involved in sports	49%	41%	50%	49%	50%	n.s.
Taking a city break	55%	45%	55%	52%	58%	n.s.



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

► Note: Queried designation of Navarre for Spanish respondents = “Navarra”

6.2 Supply: Supported theme suitability – Sociodemographic differentiation

Supported theme suitability of the specific themes

> In your opinion, to what extent is the following domestic tourist destination suitable for the holiday activities below (regardless of your own interest in the holiday activities)?

> Top-two-box on a scale from “5 = very suitable” to “1 = not at all suitable” (in % of respondents)

■ Navarra

Source market: Spain

Sociodemography: Formal education

Base: All respondents

Number of respondents: 1,000

Specific themes	total	Formal education (3% 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	
Cycling (not mountain biking)	48%	38%	49%	48%	49%	n.s.
Using family offers	51%	40%	52%	47%	54%	n.s.
Hiking	57%	38%	49%	56%	61%	n.s.
Undertaking a sustainable holiday trip	51%	37%	47%	53%	53%	n.s.
Taking a wine tour	52%	33%	49%	53%	55%	n.s.



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

► Note: Queried designation of Navarre for Spanish respondents = “Navarra”

6.2 Supply: Supported theme suitability – Sociodemographic differentiation

Supported theme suitability of the general themes

> In your opinion, to what extent is the following domestic tourist destination suitable for the holiday activities below (regardless of your own interest in the holiday activities)?

> Top-two-box on a scale from “5 = very suitable” to “1 = not at all suitable” (in % of respondents)

■ Navarra

Source market: Spain

Sociodemography: Household size

Base: All respondents

Number of respondents: 1,000

General themes	total	Household size				Significance* (Kruskal-Wallis-test)
		1-person-hh**	2-person-hh	3-person-hh	4 and more persons in hh	
Enjoying culinary / gastronomic specialties	59%	64%	61%	54%	60%	sig.
Visit to cultural institutions / using cultural services	52%	60%	53%	48%	53%	n.s.
Enjoying nature	59%	65%	61%	56%	58%	sig.
Being active and involved in sports	49%	49%	47%	48%	51%	n.s.
Taking a city break	55%	63%	56%	52%	56%	n.s.



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

► Note: Queried designation of Navarre for Spanish respondents = “Navarra”

6.2 Supply: Supported theme suitability – Sociodemographic differentiation

Supported theme suitability of the specific themes

> In your opinion, to what extent is the following domestic tourist destination suitable for the holiday activities below (regardless of your own interest in the holiday activities)?

> Top-two-box on a scale from “5 = very suitable” to “1 = not at all suitable” (in % of respondents)

■ Navarra

Source market: Spain

Sociodemography: Household size

Base: All respondents

Number of respondents: 1,000

Specific themes	total	Household size				Significance* (Kruskal-Wallis-test)
		1-person-hh**	2-person-hh	3-person-hh	4 and more persons in hh	
Cycling (not mountain biking)	48%	53%	47%	46%	48%	n.s.
Using family offers	51%	55%	52%	47%	53%	n.s.
Hiking	57%	62%	57%	56%	56%	n.s.
Undertaking a sustainable holiday trip	51%	55%	53%	46%	52%	n.s.
Taking a wine tour	52%	56%	52%	48%	55%	n.s.



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

► Note: Queried designation of Navarre for Spanish respondents = “Navarra”

6.2 Supply: Supported theme suitability – Sociodemographic differentiation

Supported theme suitability of the general themes

> In your opinion, to what extent is the following domestic tourist destination suitable for the holiday activities below (regardless of your own interest in the holiday activities)?

> Top-two-box on a scale from “5 = very suitable” to “1 = not at all suitable” (in % of respondents)

■ Navarra

Source market: Spain

Sociodemography: Children < 14 y. in hh

Base: All respondents

Number of respondents: 1,000

General themes	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.	
Enjoying culinary / gastronomic specialities	59%	60%	55%	60%	n.s.
Visit to cultural institutions / using cultural services	52%	54%	45%	52%	n.s.
Enjoying nature	59%	60%	54%	59%	n.s.
Being active and involved in sports	49%	49%	45%	53%	n.s.
Taking a city break	55%	57%	50%	54%	n.s.



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

► Note: Queried designation of Navarre for Spanish respondents = “Navarra”

6.2 Supply: Supported theme suitability – Sociodemographic differentiation

Supported theme suitability of the specific themes

> In your opinion, to what extent is the following domestic tourist destination suitable for the holiday activities below (regardless of your own interest in the holiday activities)?

> Top-two-box on a scale from “5 = very suitable” to “1 = not at all suitable” (in % of respondents)

■ Navarra

Source market: Spain

Sociodemography: Children < 14 y. in hh

Base: All respondents

Number of respondents: 1,000

Specific themes	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.	
Cycling (not mountain biking)	48%	48%	45%	50%	n.s.
Using family offers	51%	52%	47%	55%	n.s.
Hiking	57%	57%	56%	59%	n.s.
Undertaking a sustainable holiday trip	51%	53%	44%	52%	n.s.
Taking a wine tour	52%	53%	48%	55%	n.s.



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

► Note: Queried designation of Navarre for Spanish respondents = “Navarra”

6.2 Supply: Supported theme suitability – Sociodemographic differentiation

Supported theme suitability of the general themes

> In your opinion, to what extent is the following domestic tourist destination suitable for the holiday activities below (regardless of your own interest in the holiday activities)?

> Top-two-box on a scale from “5 = very suitable” to “1 = not at all suitable” (in % of respondents)

■ Navarra

Source market: Spain

Sociodemography: Net hh income**

Base: All respondents

Number of respondents: 1,000

General themes	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***	
Enjoying culinary / gastronomic specialties	59%	51%	62%	63%	66%	n.s.
Visit to cultural institutions / using cultural services	52%	44%	56%	55%	60%	sig.
Enjoying nature	59%	49%	62%	62%	69%	sig.
Being active and involved in sports	49%	43%	49%	52%	59%	n.s.
Taking a city break	55%	51%	57%	57%	64%	n.s.



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

► Note: Queried designation of Navarre for Spanish respondents = “Navarra”

6.2 Supply: Supported theme suitability – Sociodemographic differentiation

Supported theme suitability of the specific themes

> In your opinion, to what extent is the following domestic tourist destination suitable for the holiday activities below (regardless of your own interest in the holiday activities)?

> Top-two-box on a scale from “5 = very suitable” to “1 = not at all suitable” (in % of respondents)

■ Navarra

Source market: Spain

Sociodemography: Net hh income**

Base: All respondents

Number of respondents: 1,000

Specific themes	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***	
Cycling (not mountain biking)	48%	40%	51%	48%	61%	sig.
Using family offers	51%	43%	54%	54%	58%	sig.
Hiking	57%	48%	60%	59%	69%	n.s.
Undertaking a sustainable holiday trip	51%	43%	52%	52%	64%	n.s.
Taking a wine tour	52%	46%	53%	55%	66%	n.s.



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

► Note: Queried designation of Navarre for Spanish respondents = “Navarra”

6.2 Supply: Supported theme suitability – Sociodemographic differentiation

Supported theme suitability of the general themes

> In your opinion, to what extent is the following domestic tourist destination suitable for the holiday activities below (regardless of your own interest in the holiday activities)?

> Top-two-box on a scale from “5 = very suitable” to “1 = not at all suitable” (in % of respondents)

■ Navarra

Source market: Spain

Sociodemography: Town size

Base: All respondents

Number of respondents: 1,000

General themes	total	Town size				Significance* (Kruskal-Wallis-test)
		under 20,000 inh.	20,000 up to < 100,000 inh.	100,000 up to < 500,000 inh.	500,000 inh. and more	
Enjoying culinary / gastronomic specialties	59%	52%	61%	60%	63%	n.s.
Visit to cultural institutions / using cultural services	52%	44%	53%	54%	58%	sig.
Enjoying nature	59%	49%	60%	62%	65%	n.s.
Being active and involved in sports	49%	39%	53%	48%	55%	n.s.
Taking a city break	55%	45%	58%	55%	64%	n.s.



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

► Note: Queried designation of Navarre for Spanish respondents = “Navarra”

6.2 Supply: Supported theme suitability – Sociodemographic differentiation

Supported theme suitability of the specific themes

> In your opinion, to what extent is the following domestic tourist destination suitable for the holiday activities below (regardless of your own interest in the holiday activities)?

> Top-two-box on a scale from “5 = very suitable” to “1 = not at all suitable” (in % of respondents)

■ Navarra

Source market: Spain

Sociodemography: Town size

Base: All respondents

Number of respondents: 1,000

Specific themes	total	Town size				Significance* (Kruskal-Wallis-test)
		under 20,000 inh.	20,000 up to < 100,000 inh.	100,000 up to < 500,000 inh.	500,000 inh. and more	
Cycling (not mountain biking)	48%	40%	51%	48%	51%	n.s.
Using family offers	51%	42%	55%	52%	56%	n.s.
Hiking	57%	48%	59%	60%	61%	n.s.
Undertaking a sustainable holiday trip	51%	42%	53%	49%	58%	n.s.
Taking a wine tour	52%	44%	57%	49%	58%	n.s.



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

► Note: Queried designation of Navarre for Spanish respondents = “Navarra”

6.2 Supply: Supported theme suitability – Sociodemographic differentiation

Supported theme suitability of the general themes

> In your opinion, to what extent is the following domestic tourist destination suitable for the holiday activities below (regardless of your own interest in the holiday activities)?

> Top-two-box on a scale from “5 = very suitable” to “1 = not at all suitable” (in % of respondents)

■ Navarra

Source market: Spain

Sociodemography: NUTS1 regions

Base: All respondents

Number of respondents: 1,000

General themes	total	Regional origin differentiated by NUTS1 regions						Significance* (Kruskal-Wallis-test)
		North-West**	North-East	Madrid	Centre	East	South	
Enjoying culinary / gastronomic specialties	59%	64%	71%	62%	60%	55%	54%	n.s.
Visit to cultural institutions / using cultural services	52%	58%	72%	50%	51%	48%	49%	n.s.
Enjoying nature	59%	64%	79%	64%	55%	57%	49%	sig.
Being active and involved in sports	49%	50%	70%	46%	49%	46%	44%	n.s.
Taking a city break	55%	59%	68%	55%	55%	53%	52%	n.s.



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

► Note: Queried designation of Navarre for Spanish respondents = “Navarra”

6.2 Supply: Supported theme suitability – Sociodemographic differentiation

Supported theme suitability of the specific themes

> In your opinion, to what extent is the following domestic tourist destination suitable for the holiday activities below (regardless of your own interest in the holiday activities)?

> Top-two-box on a scale from “5 = very suitable” to “1 = not at all suitable” (in % of respondents)

■ Navarra

Source market: Spain

Sociodemography: NUTS1 regions

Base: All respondents

Number of respondents: 1,000

Specific themes	total	Regional origin differentiated by NUTS1 regions						Significance* (Kruskal-Wallis-test)
		North-West**	North-East	Madrid	Centre	East	South	
Cycling (not mountain biking)	48%	48%	62%	44%	48%	47%	43%	n.s.
Using family offers	51%	51%	76%	50%	52%	47%	46%	sig.
Hiking	57%	59%	75%	58%	55%	55%	50%	n.s.
Undertaking a sustainable holiday trip	51%	50%	69%	48%	51%	49%	46%	sig.
Taking a wine tour	52%	56%	62%	57%	53%	49%	47%	n.s.



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

► Note: Queried designation of Navarre for Spanish respondents = “Navarra”

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5 DEMAND: GENERAL INTEREST POTENTIAL IN DETAIL

6 SUPPLY: SUPPORTED THEME SUITABILITY IN DETAIL

6.1 Results of univariate analyses

6.2 Sociodemographic differentiation

6.3 Standard target group analysis

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6.3 Supply: Supported theme suitability – *Standard target group analysis*

Target group definitions – in coordination with Dirección General de Turismo, Comercio y Consumo Navarra

“Interested in culinary”	<ul style="list-style-type: none"> General (i.e., regardless of a specific tourist destination) interest in the touristic holiday activity “Enjoying culinary / gastronomic specialties” (top-two-box on a scale from “5 = very interested” to “1 = not at all interested”)
“Interested in nature”	<ul style="list-style-type: none"> 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 countrysides”	<ul style="list-style-type: none"> General (i.e., regardless of a specific tourist destination) interest in the touristic holiday activity “Spending holidays in the countryside (e.g., on the farm or vineyard)” (top-two-box on a scale from “5 = very interested” to “1 = not at all interested”)
“Interested in cycling”	<ul style="list-style-type: none"> 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 family offers”	<ul style="list-style-type: none"> General (i.e., regardless of a specific tourist destination) interest in the touristic holiday activity “Using family offers” (top-two-box on a scale from “5 = very interested” to “1 = not at all interested”)
“Interested in sustainable trips”	<ul style="list-style-type: none"> 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”)

Source: inspektour (international) GmbH, 2021

6.3 Supply: Supported theme suitability – Standard target group analysis

Overview test of significance*: Target groups Dirección General de Turismo, Comercio y Consumo Navarra

Examined themes <i>Navarra</i> (Source market: Spain)	Interested in culinary	Interested in nature	Interested in countrysides	Interested in cycling	Interested in family offers	Interested in sustainable trips
Enjoying culinary / gastronomic specialities	significant	significant	significant	significant	significant	significant
Visit to cultural institutions / using cultural services	significant	significant	significant	significant	significant	significant
Enjoying nature	significant	significant	significant	not significant	significant	significant
Being active and involved in sports	significant	significant	significant	significant	significant	significant
Taking a city break	significant	significant	significant	significant	significant	significant
Cycling (not mountain biking)	significant	significant	significant	significant	significant	significant
Using family offers	significant	significant	significant	significant	significant	significant
Hiking	significant	significant	significant	significant	significant	significant
Undertaking a sustainable holiday trip	significant	significant	significant	significant	significant	significant
Taking a wine tour	significant	significant	significant	significant	significant	significant

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

6.3 Supply: Supported theme suitability – Standard target group analysis

Supported theme suitability for the holiday activity: “Enjoying culinary / gastronomic specialities”

> In your opinion, to what extent is the following domestic tourist destination suitable for the holiday activities below (regardless of your own interest in the holiday activities)?
> Top-two-box on a scale from “5 = very suitable” to “1 = not at all suitable” (in % of respondents)

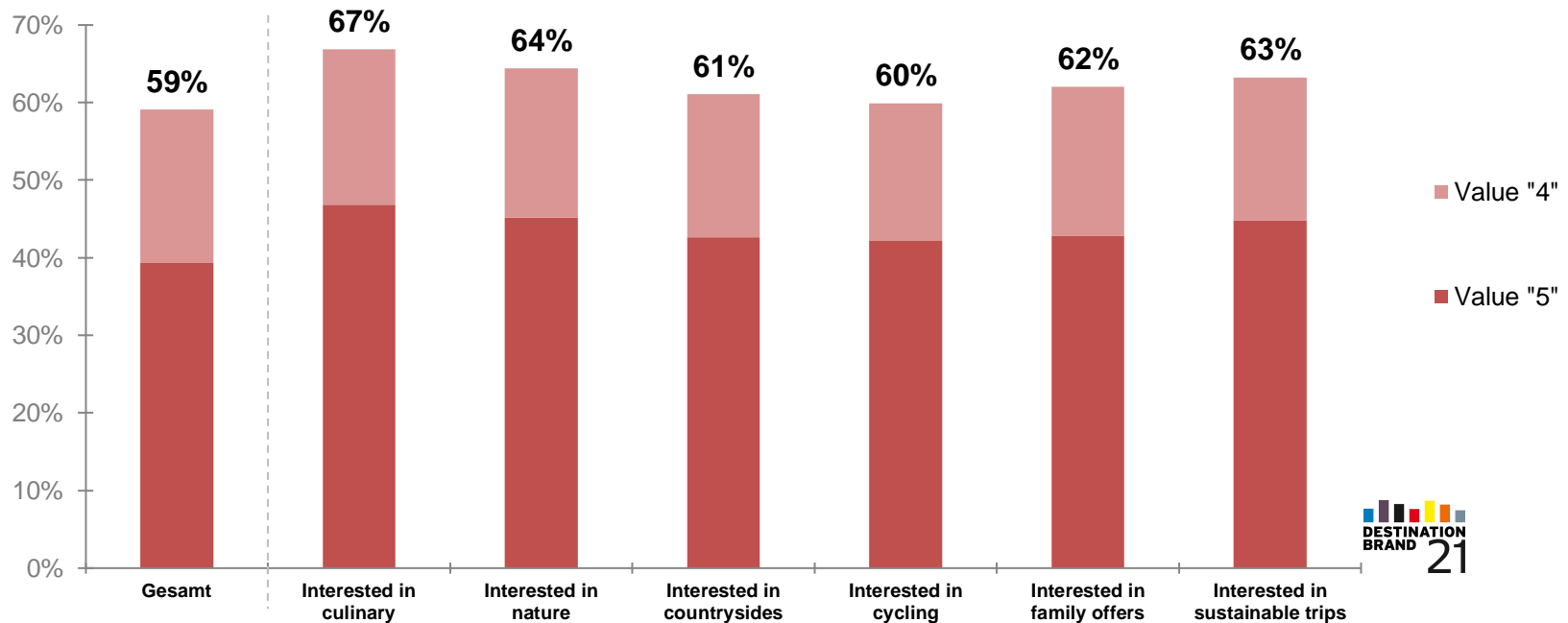
■ Navarra

Source market: Spain

Segmentation: Target groups

Base: All respondents

Number of respondents: 1,000



► **Note:** Queried designation of Navarre
for Spanish respondents = “Navarra”

Source: inspektour (international) GmbH, 2021

6.3 Supply: Supported theme suitability – Standard target group analysis

Supported theme suitability for the holiday activity: “Visit to cultural institutions / using cultural services”

> In your opinion, to what extent is the following domestic tourist destination suitable for the holiday activities below (regardless of your own interest in the holiday activities)?
> Top-two-box on a scale from “5 = very suitable” to “1 = not at all suitable” (in % of respondents)

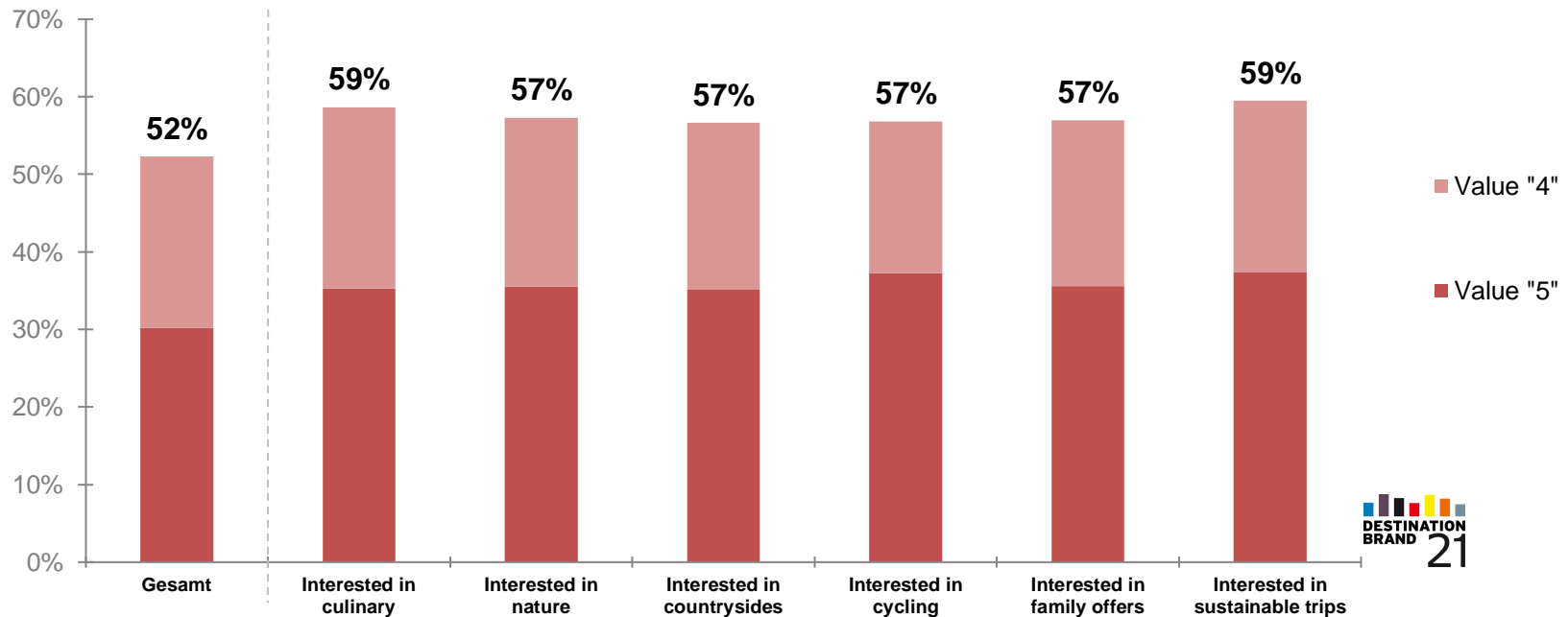
■ Navarra

Source market: Spain

Segmentation: Target groups

Base: All respondents

Number of respondents: 1,000



► **Note:** Queried designation of Navarre
for Spanish respondents = “Navarra”

Source: inspektour (international) GmbH, 2021

6.3 Supply: Supported theme suitability – Standard target group analysis

Supported theme suitability for the holiday activity:

“Enjoying nature”

> In your opinion, to what extent is the following domestic tourist destination suitable for the holiday activities below (regardless of your own interest in the holiday activities)?

> Top-two-box on a scale from “5 = very suitable” to “1 = not at all suitable” (in % of respondents)

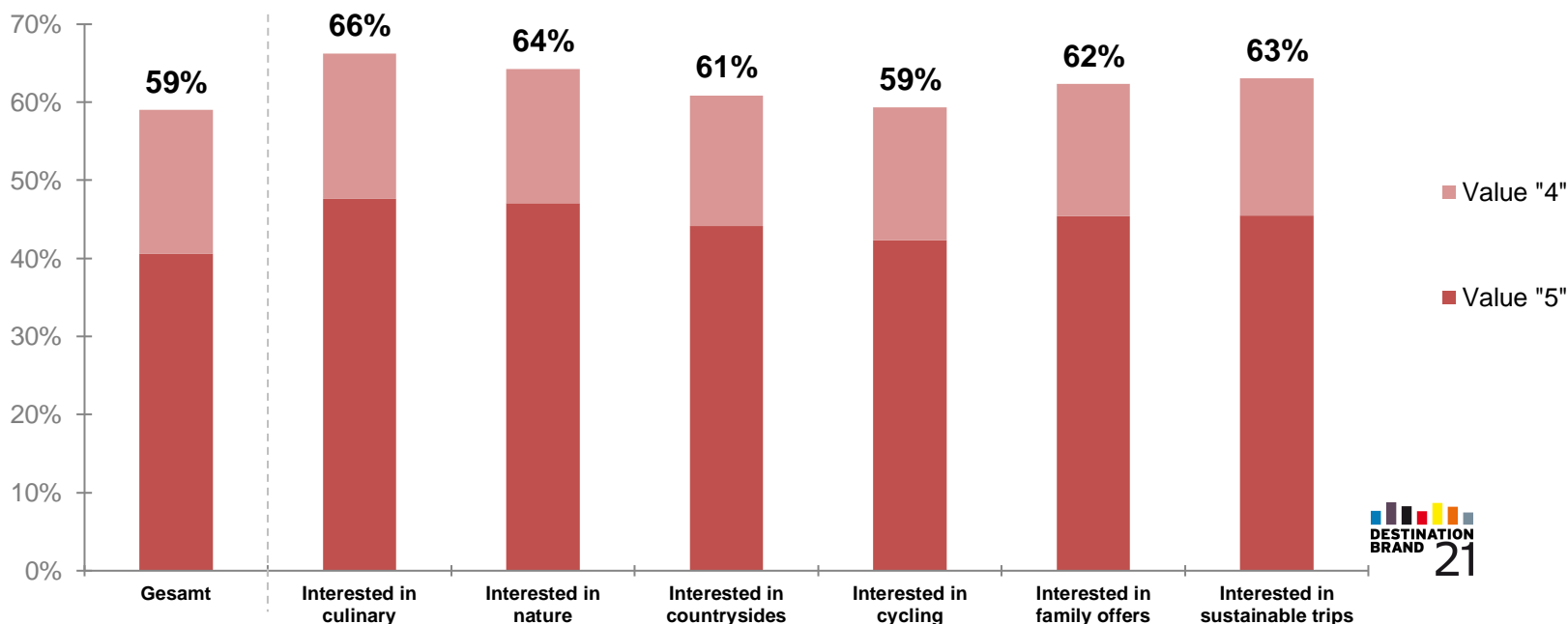
■ Navarra

Source market: Spain

Segmentation: Target groups

Base: All respondents

Number of respondents: 1,000



► **Note:** Queried designation of Navarre for Spanish respondents = “Navarra”

Source: inspektour (international) GmbH, 2021

6.3 Supply: Supported theme suitability – Standard target group analysis

Supported theme suitability for the holiday activity: “Being active and involved in sports”

> In your opinion, to what extent is the following domestic tourist destination suitable for the holiday activities below (regardless of your own interest in the holiday activities)?
> Top-two-box on a scale from “5 = very suitable” to “1 = not at all suitable” (in % of respondents)

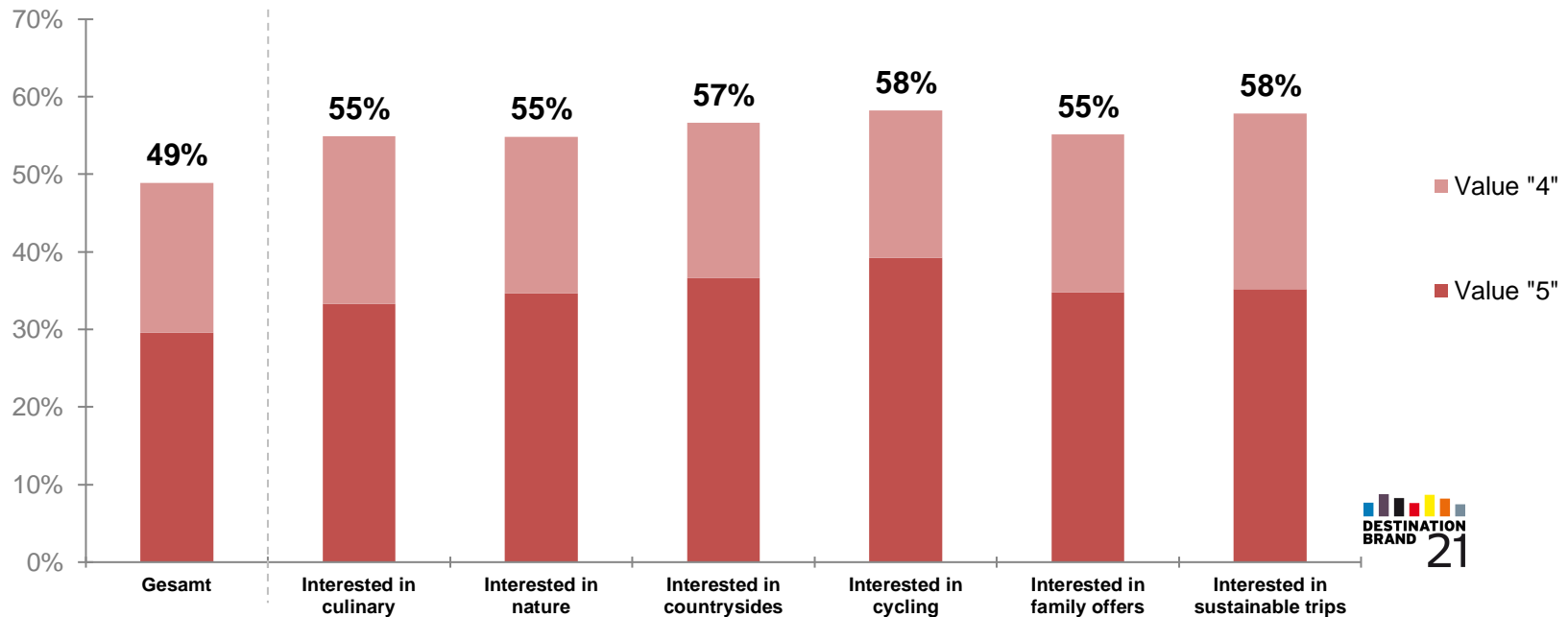
■ Navarra

Source market: Spain

Segmentation: Target groups

Base: All respondents

Number of respondents: 1,000



► **Note:** Queried designation of Navarre
for Spanish respondents = “Navarra”

Source: inspektour (international) GmbH, 2021

6.3 Supply: Supported theme suitability – Standard target group analysis

Supported theme suitability for the holiday activity:

“Taking a city break”

> In your opinion, to what extent is the following domestic tourist destination suitable for the holiday activities below (regardless of your own interest in the holiday activities)?

> Top-two-box on a scale from “5 = very suitable” to “1 = not at all suitable” (in % of respondents)

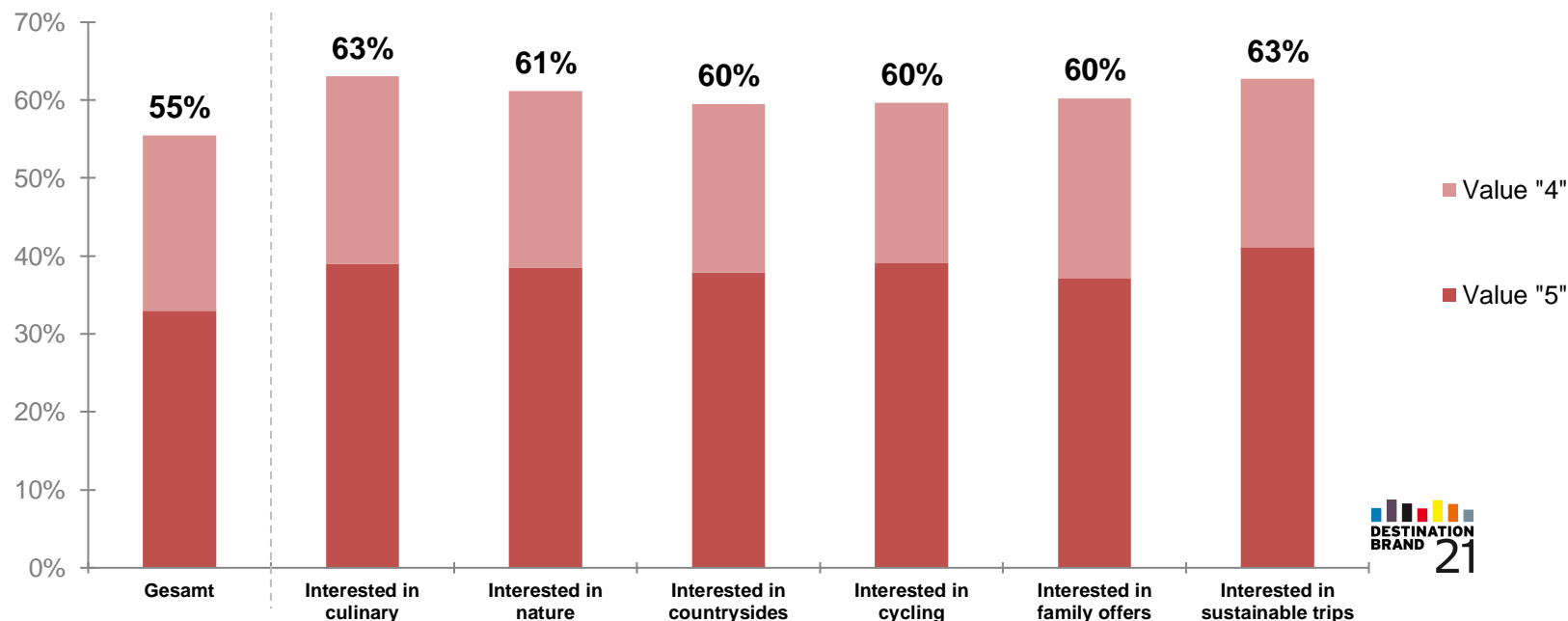
■ Navarra

Source market: Spain

Segmentation: Target groups

Base: All respondents

Number of respondents: 1,000



► **Note:** Queried designation of Navarre for Spanish respondents = “Navarra”

Source: inspektour (international) GmbH, 2021

6.3 Supply: Supported theme suitability – Standard target group analysis

Supported theme suitability for the holiday activity:

“Cycling (not mountain biking)”

> In your opinion, to what extent is the following domestic tourist destination suitable for the holiday activities below (regardless of your own interest in the holiday activities)?

> Top-two-box on a scale from “5 = very suitable” to “1 = not at all suitable” (in % of respondents)

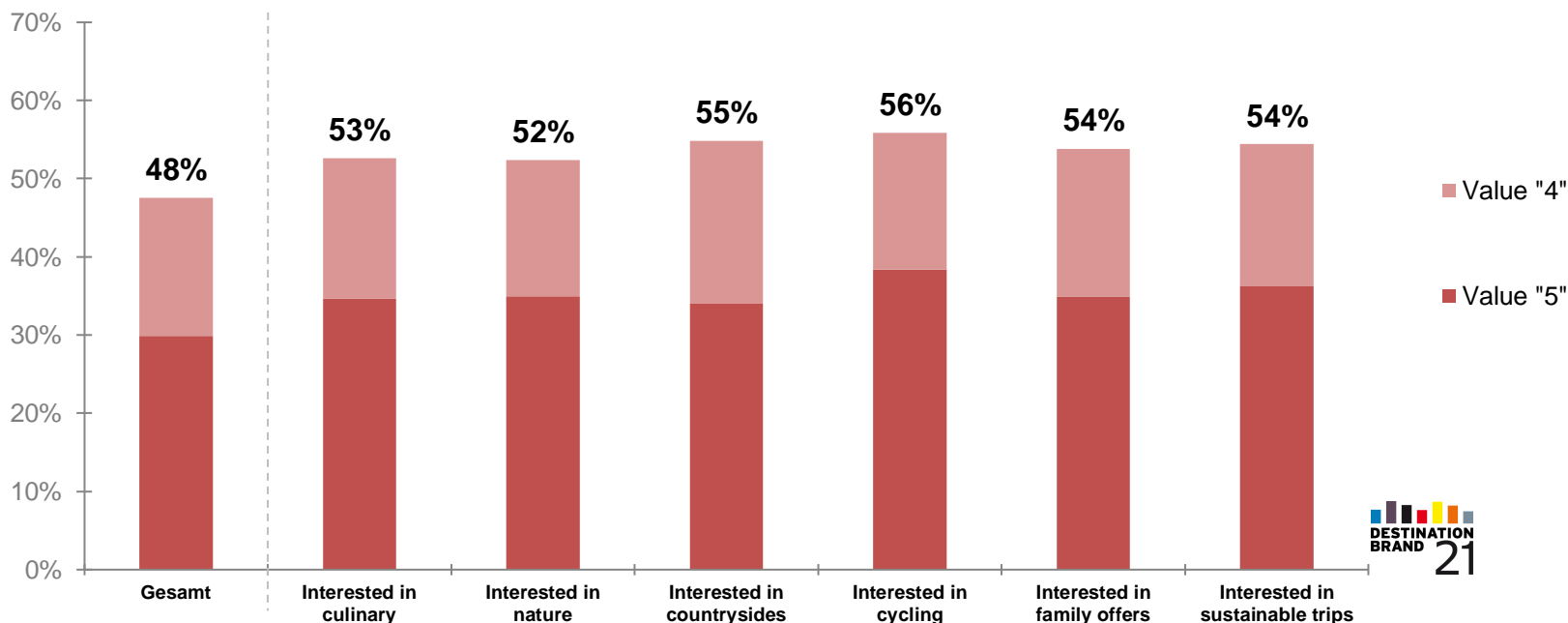
■ Navarra

Source market: Spain

Segmentation: Target groups

Base: All respondents

Number of respondents: 1,000



► **Note:** Queried designation of Navarre for Spanish respondents = “Navarra”

Source: inspektour (international) GmbH, 2021

6.3 Supply: Supported theme suitability – Standard target group analysis

Supported theme suitability for the holiday activity:

“Using family offers”

> In your opinion, to what extent is the following domestic tourist destination suitable for the holiday activities below (regardless of your own interest in the holiday activities)?

> Top-two-box on a scale from “5 = very suitable” to “1 = not at all suitable” (in % of respondents)

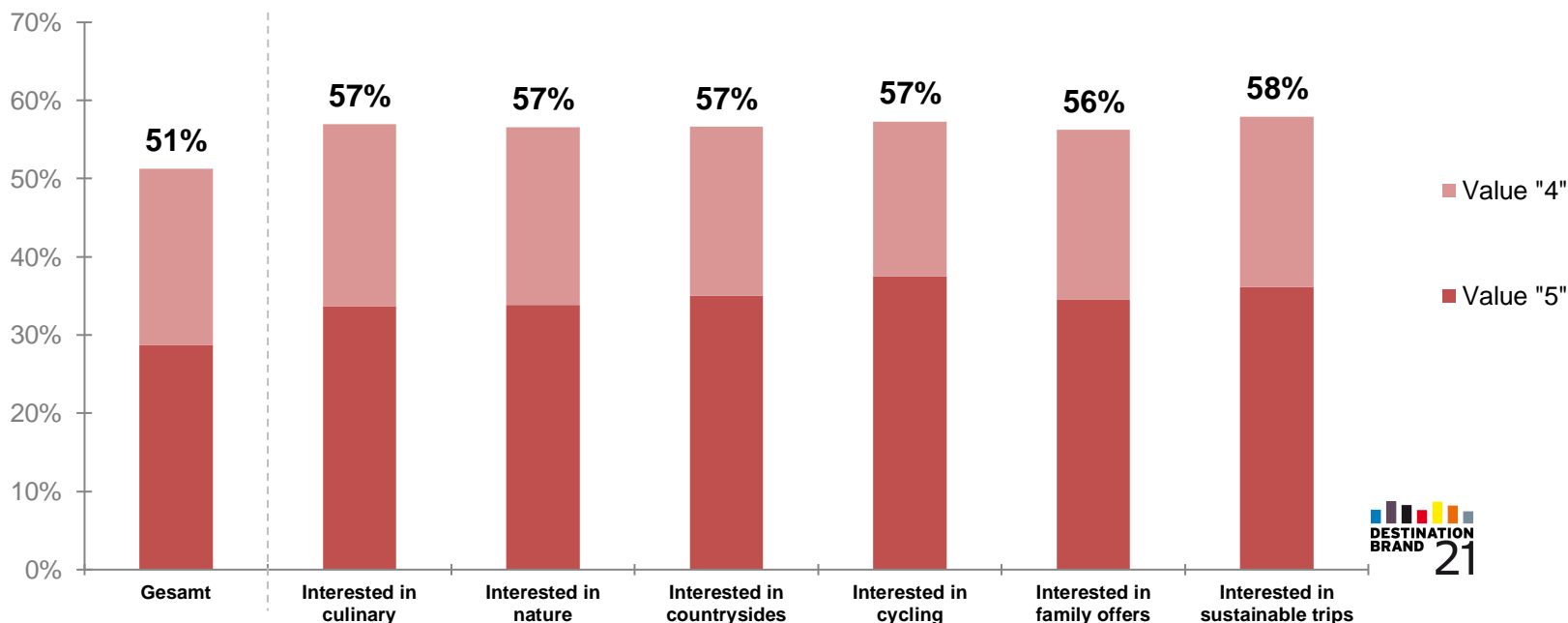
■ Navarra

Source market: Spain

Segmentation: Target groups

Base: All respondents

Number of respondents: 1,000



► **Note:** Queried designation of Navarra for Spanish respondents = “Navarra”

Source: inspektour (international) GmbH, 2021

6.3 Supply: Supported theme suitability – Standard target group analysis

Supported theme suitability for the holiday activity: “Hiking”

> In your opinion, to what extent is the following domestic tourist destination suitable for the holiday activities below (regardless of your own interest in the holiday activities)?
> Top-two-box on a scale from “5 = very suitable” to “1 = not at all suitable” (in % of respondents)

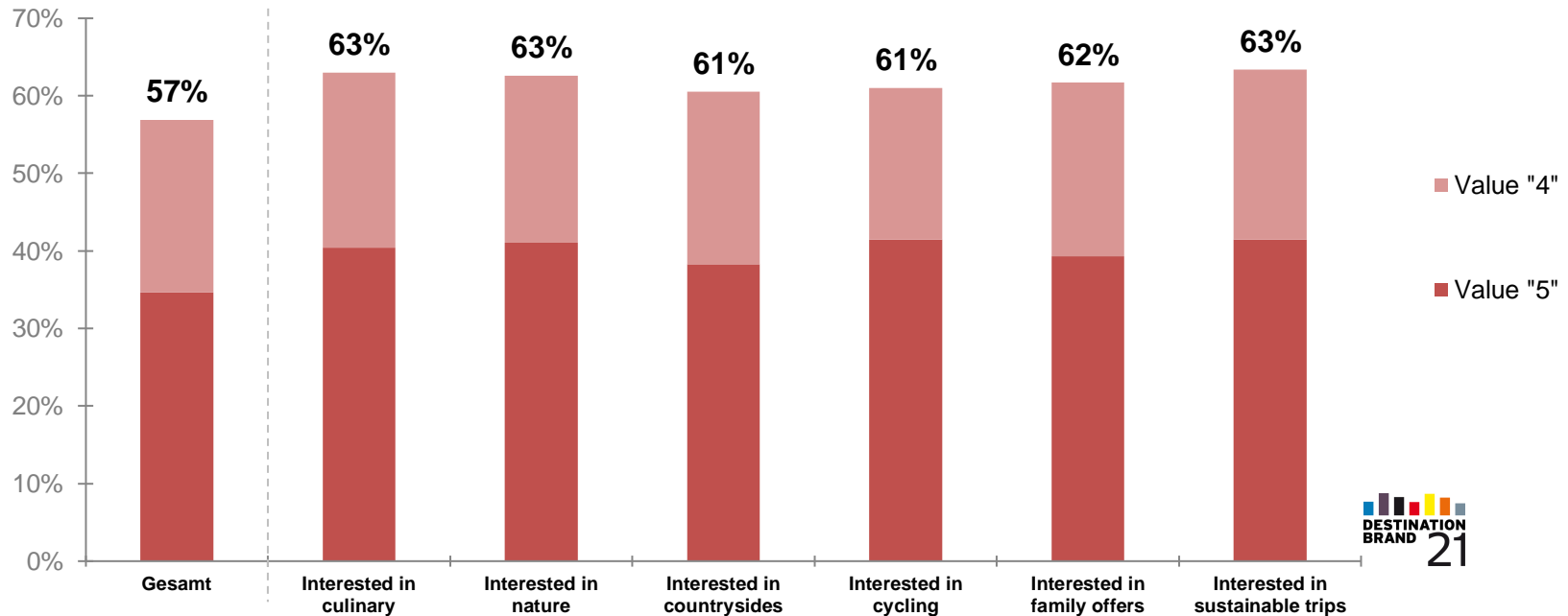
■ Navarra

Source market: Spain

Segmentation: Target groups

Base: All respondents

Number of respondents: 1,000



► **Note:** Queried designation of Navarre
for Spanish respondents = “Navarra”

Source: inspektour (international) GmbH, 2021

6.3 Supply: Supported theme suitability – *Standard target group analysis*

Supported theme suitability for the holiday activity: “Undertaking a sustainable holiday trip (nature preserving / environmentally friendly, economically and socially fair)”

> In your opinion, to what extent is the following domestic tourist destination suitable for the holiday activities below (regardless of your own interest in the holiday activities)?

> Top-two-box on a scale from “5 = very suitable” to “1 = not at all suitable” (in % of respondents)

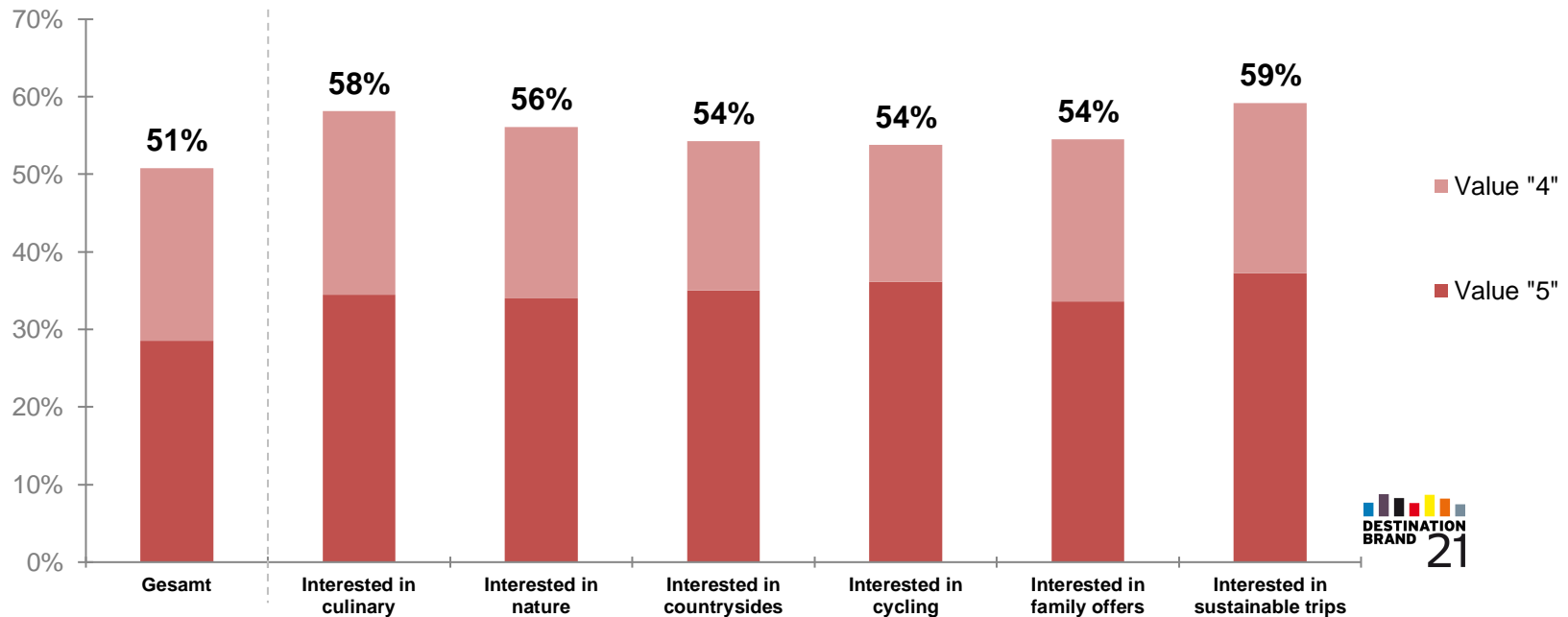
■ **Navarra**

Source market: Spain

Segmentation: Target groups

Base: All respondents

Number of respondents: 1,000



► **Note:** Queried designation of Navarra for Spanish respondents = “Navarra”

Source: inspektour (international) GmbH, 2021

6.3 Supply: Supported theme suitability – *Standard target group analysis*

Supported theme suitability for the holiday activity: “Taking a wine tour (e.g., wine tasting, visiting wine festivals, vineyard walks, participating in the grape harvest)”

> In your opinion, to what extent is the following domestic tourist destination suitable for the holiday activities below (regardless of your own interest in the holiday activities)?

> Top-two-box on a scale from “5 = very suitable” to “1 = not at all suitable” (in % of respondents)

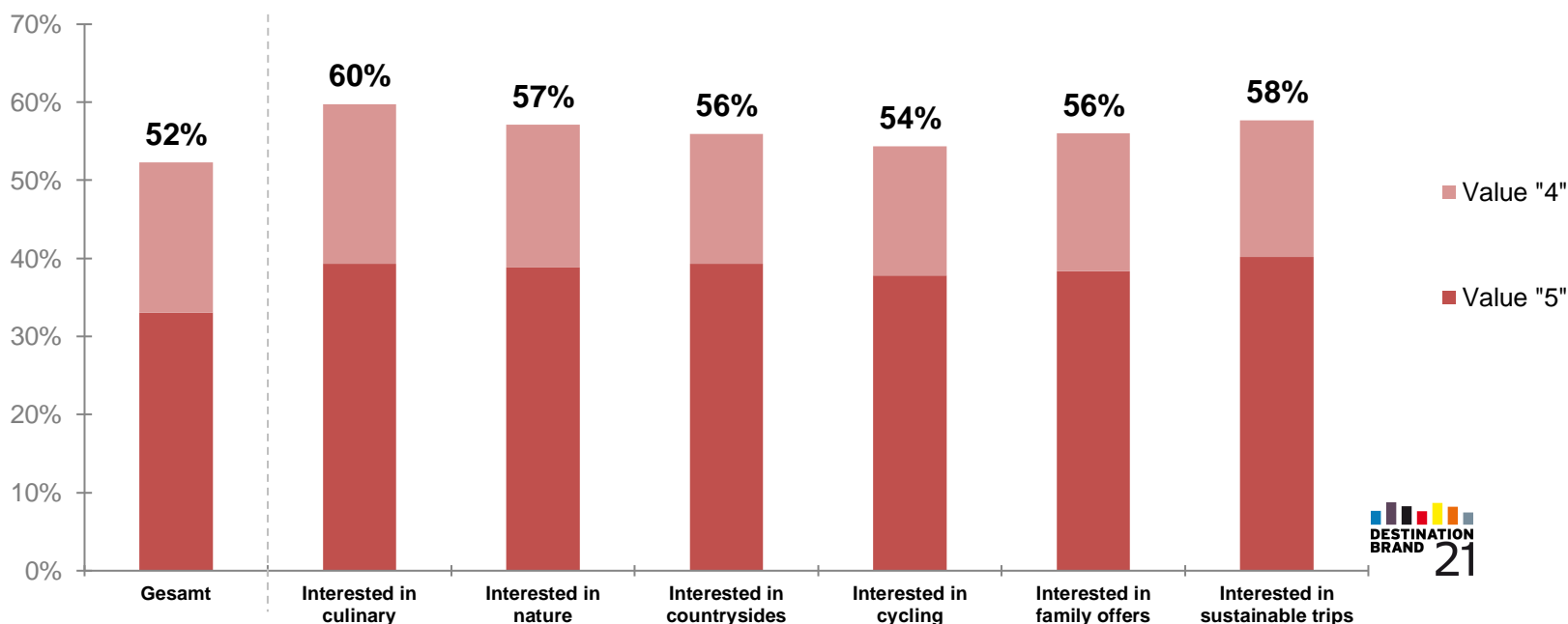
■ **Navarra**

Source market: Spain

Segmentation: Target groups

Base: All respondents

Number of respondents: 1,000




► **Note:** Queried designation of Navarre for Spanish respondents = “Navarra”

Source: inspektour (international) GmbH, 2021

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7. Supported theme suitability – Competitor analysis: All considered destinations

 “Enjoying culinary / gastronomic specialities“ Source market: Spain Top-two-box on a scale from “5 = very suitable” to “1 = not at all suitable” (in % of respondents) Base: All respondents Ranking in category: All considered destinations (mean = 59%)		
Rank	Queried designation of tourist destination; English translation in brackets	%-value
1	Galicia (Galicia)	
2	País Vasco (Basque Country)	
3	Santiago de Compostela (Santiago de Compostela)	
4	Madrid (Madrid)	
5	Bilbao (Bilbao)	
6	Navarra (Navarre)	59%
7	Pamplona (Pamplona)	
8	Alemania (Germany)	
9	Berlín (Berlin)	
10	Luxemburgo (Luxembourg)	


► **Note:** Last survey taken into consideration in October until December 2021

7. Supported theme suitability – Competitor analysis: All considered destinations

 “Enjoying culinary / gastronomic specialities“ Source market: Spain Top-two-box on a scale from “5 = very suitable” to “1 = not at all suitable” (in % of respondents) Base: All respondents with interest in the theme Ranking in category: All considered destinations (mean = 66%)		
Rank	Queried designation of tourist destination; English translation in brackets	%-value
1	Galicia (Galicia)	
2	Santiago de Compostela (Santiago de Compostela)	
3	País Vasco (Basque Country)	
4	Madrid (Madrid)	
5	Bilbao (Bilbao)	
6	Navarra (Navarre)	67%
7	Pamplona (Pamplona)	
8	Alemania (Germany)	
9	Berlín (Berlin)	
10	Luxemburgo (Luxembourg)	


► **Note:** Last survey taken into consideration in October until December 2021

7. Supported theme suitability – Competitor analysis: All considered destinations

<div>  <div> “Visit to cultural institutions / using cultural services“ Source market: Spain Top-two-box on a scale from “5 = very suitable” to “1 = not at all suitable” (in % of respondents) Base: All respondents Ranking in category: All considered destinations (mean = 59%) </div> </div>		
Rank	Queried designation of tourist destination; English translation in brackets	%-value
1	Madrid (Madrid)	
2	Galicia (Galicia)	
3	Santiago de Compostela (Santiago de Compostela)	
4	País Vasco (Basque Country)	
5	Bilbao (Bilbao)	
6	Alemania (Germany)	
7	Berlín (Berlin)	
8	Navarra (Navarre)	52%
9	Pamplona (Pamplona)	
10	Luxemburgo (Luxembourg)	


► **Note:** Last survey taken into consideration in October until December 2021

7. Supported theme suitability – Competitor analysis: All considered destinations

 “Visit to cultural institutions / using cultural services“ Source market: Spain Top-two-box on a scale from “5 = very suitable” to “1 = not at all suitable” (in % of respondents) Base: All respondents with interest in the theme Ranking in category: All considered destinations (mean = 66%)		
Rank	Queried designation of tourist destination; English translation in brackets	%-value
1	Madrid (Madrid)	
2	Galicia (Galicia)	
3	Santiago de Compostela (Santiago de Compostela)	
4	Bilbao (Bilbao)	
5	País Vasco (Basque Country)	
6	Alemania (Germany)	
7	Berlín (Berlin)	
8	Pamplona (Pamplona)	
9	Navarra (Navarre)	60%
10	Luxemburgo (Luxembourg)	


► **Note:** Last survey taken into consideration in October until December 2021

7. Supported theme suitability – Competitor analysis: All considered destinations

 <p>“Enjoying nature“ Source market: Spain Top-two-box on a scale from “5 = very suitable” to “1 = not at all suitable” (in % of respondents) Base: All respondents Ranking in category: All considered destinations (mean = 55%)</p>		
Rank	Queried designation of tourist destination; English translation in brackets	%-value
1	Galicia (Galicia)	
2	País Vasco (Basque Country)	
3	Santiago de Compostela (Santiago de Compostela)	
4	Navarra (Navarre)	59%
5	Bilbao (Bilbao)	
6	Alemania (Germany)	
7	Pamplona (Pamplona)	
8	Madrid (Madrid)	
9	Berlín (Berlin)	
10	Luxemburgo (Luxembourg)	


► **Note:** Last survey taken into consideration in October until December 2021

7. Supported theme suitability – Competitor analysis: All considered destinations

 “Enjoying nature“ Source market: Spain <i>Top-two-box on a scale from “5 = very suitable” to “1 = not at all suitable” (in % of respondents)</i> <i>Base: All respondents with interest in the theme</i> Ranking in category: All considered destinations (mean = 59%)		
Rank	Queried designation of tourist destination; English translation in brackets	%-value
1	Galicia (Galicia)	
2	País Vasco (Basque Country)	
3	Santiago de Compostela (Santiago de Compostela)	
4	Navarra (Navarre)	64%
5	Alemania (Germany)	
6	Bilbao (Bilbao)	
7	Pamplona (Pamplona)	
8	Madrid (Madrid)	
9	Berlín (Berlin)	
10	Luxemburgo (Luxembourg)	


► **Note:** Last survey taken into consideration in October until December 2021

7. Supported theme suitability – Competitor analysis: All considered destinations

<div>  <div> “Being active and involved in sports“ Source market: Spain Top-two-box on a scale from “5 = very suitable” to “1 = not at all suitable” (in % of respondents) Base: All respondents Ranking in category: All considered destinations (mean = 46%) </div> </div>		
Rank	Queried designation of tourist destination; English translation in brackets	%-value
1	Galicia (Galicia)	
2	País Vasco (Basque Country)	
3	Santiago de Compostela (Santiago de Compostela)	
4	Madrid (Madrid)	
5	Navarra (Navarre)	49%
6	Bilbao (Bilbao)	
7	Alemania (Germany)	
8	Pamplona (Pamplona)	
9	Berlín (Berlin)	
10	Luxemburgo (Luxembourg)	


► **Note:** Last survey taken into consideration in October until December 2021

7. Supported theme suitability – Competitor analysis: All considered destinations

<div>  “Being active and involved in sports“ Source market: Spain <i>Top-two-box on a scale from “5 = very suitable” to “1 = not at all suitable” (in % of respondents)</i> <i>Base: All respondents with interest in the theme</i> Ranking in category: All considered destinations (mean = 56%) </div>		
Rank	Queried designation of tourist destination; English translation in brackets	%-value
1	Galicia (Galicia)	
2	Santiago de Compostela (Santiago de Compostela)	
3	País Vasco (Basque Country)	
4	Madrid (Madrid)	
5	Bilbao (Bilbao)	
6	Navarra (Navarre)	56%
7	Alemania (Germany)	
8	Pamplona (Pamplona)	
9	Berlín (Berlin)	
10	Luxemburgo (Luxembourg)	


► **Note:** Last survey taken into consideration in October until December 2021

7. Supported theme suitability – Competitor analysis: All considered destinations

<div>  <div> “Taking a city break“ Source market: Spain <i>Top-two-box on a scale from “5 = very suitable” to “1 = not at all suitable” (in % of respondents)</i> <i>Base: All respondents</i> Ranking in category: All considered destinations (mean = 61%) </div> </div>		
Rank	Queried designation of tourist destination; English translation in brackets	%-value
1	Galicia (Galicia)	
2	Madrid (Madrid)	
3	País Vasco (Basque Country)	
4	Santiago de Compostela (Santiago de Compostela)	
5	Bilbao (Bilbao)	
6	Alemania (Germany)	
7	Berlín (Berlin)	
8	Navarra (Navarre)	55%
9	Pamplona (Pamplona)	
10	Luxemburgo (Luxembourg)	


► **Note:** Last survey taken into consideration in October until December 2021

7. Supported theme suitability – Competitor analysis: All considered destinations

<div>  <div> “Taking a city break“ Source market: Spain <i>Top-two-box on a scale from “5 = very suitable” to “1 = not at all suitable” (in % of respondents)</i> <i>Base: All respondents with interest in the theme</i> Ranking in category: All considered destinations (mean = 68%) </div> </div>		
Rank	Queried designation of tourist destination; English translation in brackets	%-value
1	Madrid (Madrid)	
2	Galicia (Galicia)	
3	Alemania (Germany)	
4	Bilbao (Bilbao)	
5	Santiago de Compostela (Santiago de Compostela)	
6	País Vasco (Basque Country)	
7	Berlín (Berlin)	
8	Navarra (Navarre)	63%
9	Pamplona (Pamplona)	
10	Luxemburgo (Luxembourg)	


► **Note:** Last survey taken into consideration in October until December 2021

7. Supported theme suitability – *Competitor analysis: All considered destinations*

<div>  <div> “Cycling (not mountain biking)” Source market: Spain <i>Top-two-box on a scale from “5 = very suitable” to “1 = not at all suitable” (in % of respondents)</i> <i>Base: All respondents</i> Ranking in category: All considered destinations (mean = 49%) </div> </div>		
Rank	Queried designation of tourist destination; English translation in brackets	%-value
1	Galicia (Galicia)	
2	País Vasco (Basque Country)	
3	Navarra (Navarre)	48%
4	Berlín (Berlin)	


► **Note:** Last survey taken into consideration in October until December 2021

7. Supported theme suitability – *Competitor analysis: All considered destinations*

 “Cycling (not mountain biking)” Source market: Spain <i>Top-two-box on a scale from “5 = very suitable” to “1 = not at all suitable” (in % of respondents)</i> <i>Base: All respondents with interest in the theme</i> Ranking in category: All considered destinations (mean = 59%)		
Rank	Queried designation of tourist destination; English translation in brackets	%-value
1	Galicia (Galicia)	
2	País Vasco (Basque Country)	
3	Navarra (Navarre)	56%
4	Berlín (Berlin)	


► **Note:** Last survey taken into consideration in October until December 2021

7. Supported theme suitability – *Competitor analysis: All considered destinations*

<div>  <div> <p>“Using family offers“</p> <p>Source market: Spain</p> <p><i>Top-two-box on a scale from “5 = very suitable” to “1 = not at all suitable” (in % of respondents)</i></p> <p><i>Base: All respondents</i></p> <p>Ranking in category: All considered destinations (mean = 56%)</p> </div> </div>		
Rank	Queried designation of tourist destination; English translation in brackets	%-value
1	Galicia (Galicia)	
2	País Vasco (Basque Country)	
3	Navarra (Navarre)	51%


► **Note:** Last survey taken into consideration in October until December 2021

7. Supported theme suitability – *Competitor analysis: All considered destinations*

 “Using family offers“ Source market: Spain <i>Top-two-box on a scale from “5 = very suitable” to “1 = not at all suitable” (in % of respondents)</i> <i>Base: All respondents with interest in the theme</i> Ranking in category: All considered destinations (mean = 62%)		
Rank	Queried designation of tourist destination; English translation in brackets	%-value
1	Galicia (Galicia)	
2	País Vasco (Basque Country)	
3	Navarra (Navarre)	56%


► **Note:** Last survey taken into consideration in October until December 2021

7. Supported theme suitability – *Competitor analysis: All considered destinations*

<div>  <div> “Hiking“ Source market: Spain <i>Top-two-box on a scale from “5 = very suitable” to “1 = not at all suitable” (in % of respondents)</i> <i>Base: All respondents</i> Ranking in category: All considered destinations (mean = 62%) </div> </div>		
Rank	Queried designation of tourist destination; English translation in brackets	%-value
1	Galicia (Galicia)	
2	País Vasco (Basque Country)	
3	Santiago de Compostela (Santiago de Compostela)	
4	Navarra (Navarre)	57%


► **Note:** Last survey taken into consideration in October until December 2021

7. Supported theme suitability – Competitor analysis: All considered destinations

<div>  <div> “Hiking“ Source market: Spain <i>Top-two-box on a scale from “5 = very suitable” to “1 = not at all suitable” (in % of respondents)</i> <i>Base: All respondents with interest in the theme</i> Ranking in category: All considered destinations (mean = 68%) </div> </div>		
Rank	Queried designation of tourist destination; English translation in brackets	%-value
1	Galicia (Galicia)	
2	Santiago de Compostela (Santiago de Compostela)	
3	País Vasco (Basque Country)	
4	Navarra (Navarre)	62%

► **Note:** Last survey taken into consideration in October until December 2021

7. Supported theme suitability – Competitor analysis: All considered destinations

<div>  <div> “Undertaking a sustainable holiday trip“ Source market: Spain <i>Top-two-box on a scale from “5 = very suitable” to “1 = not at all suitable” (in % of respondents)</i> <i>Base: All respondents</i> Ranking in category: All considered destinations (mean = 47%) </div> </div>		
Rank	Queried designation of tourist destination; English translation in brackets	%-value
1	Galicia (Galicia)	
2	País Vasco (Basque Country)	
3	Navarra (Navarre)	51%
4	Alemania (Germany)	
5	Madrid (Madrid)	
6	Berlín (Berlin)	
7	Luxemburgo (Luxembourg)	


► **Note:** Last survey taken into consideration in October until December 2021

7. Supported theme suitability – *Competitor analysis: All considered destinations*

 “Undertaking a sustainable holiday trip“ Source market: Spain <i>Top-two-box on a scale from “5 = very suitable” to “1 = not at all suitable” (in % of respondents)</i> <i>Base: All respondents with interest in the theme</i> Ranking in category: All considered destinations (mean = 57%)		
Rank	Queried designation of tourist destination; English translation in brackets	%-value
1	Galicia (Galicia)	
2	País Vasco (Basque Country)	
3	Navarra (Navarre)	59%
4	Madrid (Madrid)	
5	Alemania (Germany)	
6	Berlín (Berlin)	
7	Luxemburgo (Luxembourg)	


► **Note:** Last survey taken into consideration in October until December 2021

7. Supported theme suitability – *Competitor analysis: All considered destinations*

<div>  <div> “Taking a wine tour“ Source market: Spain <i>Top-two-box on a scale from “5 = very suitable” to “1 = not at all suitable” (in % of respondents)</i> <i>Base: All respondents</i> Ranking in category: All considered destinations (mean = 42%) </div> </div>		
Rank	Queried designation of tourist destination; English translation in brackets	%-value
1	Navarra (Navarre)	52%
2	País Vasco (Basque Country)	
3	Luxemburgo (Luxembourg)	

► **Note:** Last survey taken into consideration in October until December 2021

7. Supported theme suitability – *Competitor analysis: All considered destinations*

<div>  <div> “Taking a wine tour“ Source market: Spain <i>Top-two-box on a scale from “5 = very suitable” to “1 = not at all suitable” (in % of respondents)</i> <i>Base: All respondents with interest in the theme</i> Ranking in category: All considered destinations (mean = 49%) </div> </div>		
Rank	Queried designation of tourist destination; English translation in brackets	%-value
1	País Vasco (Basque Country)	
2	Navarra (Navarre)	58%
3	Luxemburgo (Luxembourg)	

► **Note:** Last survey taken into consideration in October until December 2021

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1 GENERAL OVERVIEW OF THE STUDY SERIES DESTINATION BRAND

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3 OVERVIEW OF KEY RESULTS: UNSUPPORTED THEME COMPETENCE (TOP OF MIND)

4 OVERVIEW OF KEY RESULTS: THREE-DIMENSIONAL THEME COMPETENCE ANALYSIS

5 DEMAND: GENERAL INTEREST POTENTIAL IN DETAIL

6 SUPPLY: SUPPORTED THEME SUITABILITY IN DETAIL

7 COMPETITION: COMPARISON WITH COMPETITORS

8 CONTACT AND PROJECT PARTNERS

8.1 inspektour (international) GmbH – Tourism and market research

8.2 German Institute for Tourism Research of the FH Westküste

8.3 Ipsos GmbH

8.4 analytix – Institute for quantitative market research and statistical data analysis

8.5 Contact persons for the study series Destination Brand

9 APPENDIX

IMPRINT

8.1 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
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inspektour
TOURISM AND MARKET RESEARCH

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8.2 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

Practical relevance, independence and neutrality characterize the work of the institute. It conducts interdisciplinary research and bundles scientific competencies from various disciplines under its roof. The work of the institute is additionally enriched by members from other scientific fields as well as an advisory board. Thus, the investigated issues are comprehensively considered and classified; the research results are published in publications. As director of the German Institute for Tourism Research, Professor Dr. Bernd Eisenstein ensures the continuation of the successful work of the IMT, which he founded and headed.



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8.3 Ipsos GmbH

Ipsos is the number 3 worldwide in the market research sector. With a strong presence in 90 countries, Ipsos employs more than 18,000 people and conducts market research in more than 100 countries. Founded in 1975 in Paris, Ipsos is still managed by researchers today. With a positioning as a multi-specialist, a solid group was built up – Media and advertising research; Marketing research; Customer and employee relationship management; Social and policy research; Mobile, online, offline data collection and delivery. Ipsos is present in Germany with approx. 750 employees at six locations: Hamburg, Frankfurt, Munich, Berlin, Nuremberg and Mölln. Ipsos has been listed on the Paris Stock Exchange since 1999.

We at Ipsos are passionately curious about people, markets, brands and society in general. We provide information and analysis that makes our increasingly complex world easier and more understandable and inspires our clients to make smarter decisions.

We firmly believe in the value of our work. Safety, simplicity, speed and substance play an important role in everything we do.

Through specialisation, we offer our clients a unique pool of knowledge and expertise. Learning from different experiences gives us a differentiated view, allows us to courageously question things and inspires our creativity.

Our lived culture of togetherness and curiosity makes us attractive for top-class experts who we offer the opportunity to influence and shape the future with us.

The production processes at Ipsos are certified according to all relevant international ISO standards and industry standards and guarantee high relevance, security and data protection as well as consistently high quality.

► www.ipsos.de | www.ipsos.com



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8.4 analytix GmbH

Institute for quantitative market research and statistical data analysis

analytix GmbH was founded in 2005 by Prof. Dr. Björn Christensen as a spin-off of the Kiel Institute for the World Economy and is based at the Kiel Innovation and Technology Centre.

As an independent service provider, analytix GmbH supports companies and public institutions in the areas of quantitative market research and statistical data analysis. Based on many years of experience, the customers are supported in their entire project – from conception to the data basis and further on to detailed statistical evaluations and forecasts. The solutions are as individual as necessary and as standardised as possible to achieve the highest possible quality of the evaluations with a simultaneous cost-efficiency.

Its range of services includes the areas of quantitative market research, data mining / predictive analytics, analytical CRM (Customer-Relationship-Management) and the creation of statistical reports.

Since 2009, analytix also offers individual and weather-based sales forecasts through its subsidiary meteolytix GmbH, which was founded together with Dr. Meeno Schrader (Wetterwelt GmbH, NDR).

All employees of analytix possess a degree in economics. Knowledge of the industry regarding statistics / data mining exists in the areas of trade (online and offline), industry, banking & financial services, insurance, media, telecommunication, system catering, tourism, transport and public institutions.

► www.analytix.de



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Outline

1 GENERAL OVERVIEW OF THE STUDY SERIES DESTINATION BRAND

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9.1 Reading examples

9.2 Glossary

9.3 Margin of error

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

IMPRINT

9.1 Reading examples – Unsupported theme competence (top pf mind)

Please imagine that you intend to go on a [here theme inserted] holiday.

Which tourist destinations (countries, cities, regions etc.) in Spain do you consider particularly suitable for this purpose? (max. 3 responses)

■ Destination XY

Source market: Source market XY

Number of respondents: min. 387

Number of responses: min. 765

Base: All respondents (valid responses)

Unsupported theme competence as a domestic tourist destination ...

DESTINATION BRAND 21

		DESTINATION BRAND 21			
		% of respondents*	% of responses	number of responses	rank
... for a culinary trip	Destination XY	2.8%	1.3%	12	16.
... for a cultural holiday / a cultural trip	Destination XY	X,x%	X,x%	Xx	Xx.
... for a nature holiday	Destination XY	X,x%	X,x%	Xx	Xx.
... for an active sports holiday	Destination XY	X,x%	X,x%	Xx	Xx.
... for a city break	Destination XY	X,x%	X,x%	Xx	Xx.

* Multiple answers possible.

Central question: How often is destination xy considered spontaneously by the represented population to be a **particularly suitable domestic tourist destination** for the respective type of holiday? – Reading example: **“to go on a culinary trip”**

► In the unsupported question regarding particularly suitable domestic tourist destinations to go on a culinary trip, a total of 12 responses are attributed to destination xy. This corresponds to 2.8% of the respondents with valid responses respectively 1.3% of the responses.

► Based on the number of responses given, destination xy achieves rank 16 among all mentioned domestic tourist destinations concerning the unsupported theme competence to go on a culinary trip.

The **unsupported theme competence** of domestic tourist destinations is surveyed for the five general themes “Culinary”, “Culture”, “Nature”, “Sports” and “City break”.

The **percentages** are based on the total number of respondents as well as the total number of responses. Due to the possibility of multiple answers, the number of responses is greater than the number of respondents.

The destination’s **competitive position** is demonstrated in the column ‘rank’. In this example, the ranking takes into account **all considered domestic destinations** that were mentioned in the unsupported question – regardless of whether the supported theme suitability of the destination was tested or not. The ranking is based on the number of responses.

9.1 Reading examples – Demand: General interest potential

General interest potential of the general themes

> The following question is about your general interest in touristic holiday activities, regardless of a specific tourist destination. How interested are you in pursuing the following touristic holiday activities as part of your holiday trip with at least one overnight stay?

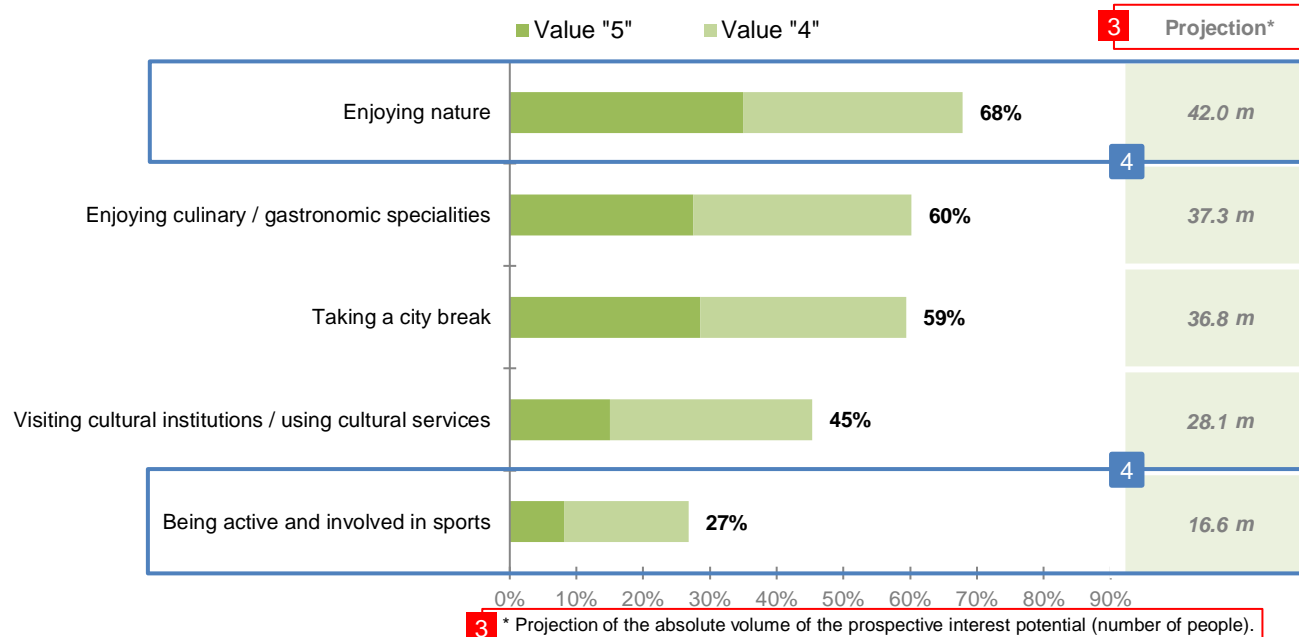
> Top-two-box on a scale from “5 = very interested” to “1 = not at all interested” (in % of respondents) ¹

General themes

Source market: Source market XY

Base: All respondents

Number of respondents: 1,000 ²



Central question: How high is the **general interest potential** (i.e., regardless of a specific tourist destination) of the represented population for the selected holiday activities (here the general themes)?

– Reading example: “Enjoying nature” and “Being active and involved in sports”

- ▶ 68% of the represented population are generally interested in the holiday activity “Enjoying nature”.
- ▶ This corresponds to 42.0 m people in the age of 14-74 years (living in private households).
- ▶ In comparison, the general interest potential of the holiday activity “Being active and involved in sports” is much lower. 27% of all respondents are interested in this holiday activity.

Values are expressed as **top-two-box values**, i.e., the percentage refers to all respondents that answered with “very interested” or value “4” for the respective theme.

In this example, **all respondents** are taken into consideration. In the study Destination Brand 21, a total of 1,000 to 17,000 people were surveyed online per source market about their general interest (i.e., regardless of a specific tourist destination) in the respective holiday activities.

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

DE = 61.94 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.

9.1 Reading examples – Supply: Supported theme suitability

Supported theme suitability of the general themes

> In your opinion, to what extent is the following domestic tourist destination suitable for the holiday activities below (regardless of your own interest in the holiday activities)?

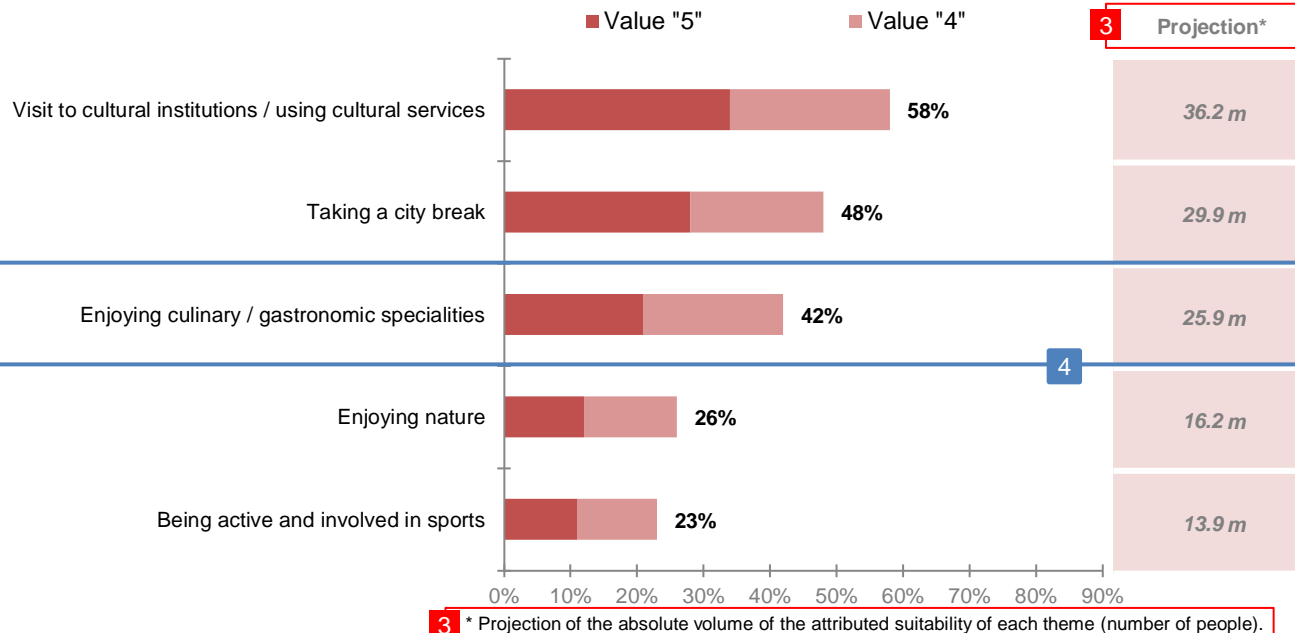
> Top-two-box on a scale from “5 = very suitable” to “1 = not at all suitable” (in % of respondents) ¹

■ Destination XY

Source market: Source market XY

Base: All respondents ²

Number of respondents: 1,000



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

² In this example, **all respondents** are considered for the analysis of the supported theme suitability. In total, 28,000 people were surveyed online in the study Destination Brand 21. 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 = 61.94 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: What is the **theme suitability** of destination xy for the **considered theme portfolio** (here the five pre-defined general themes)? – Reading example: “Enjoying culinary / gastronomic specialties”

- ▶ 42% of the represented population consider destination xy as suitable for “enjoying culinary / gastronomic specialties”.
- ▶ This corresponds to a total of 25.9 m people of the represented population in the age of 14-74 years (living in private households).

9.1 Reading examples – Supply: Supported theme suitability by subgroups

Supported theme suitability of the general themes

> In your opinion, to what extent is the following domestic tourist destination suitable for the holiday activities below (regardless of your own interest in the holiday activities)?

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

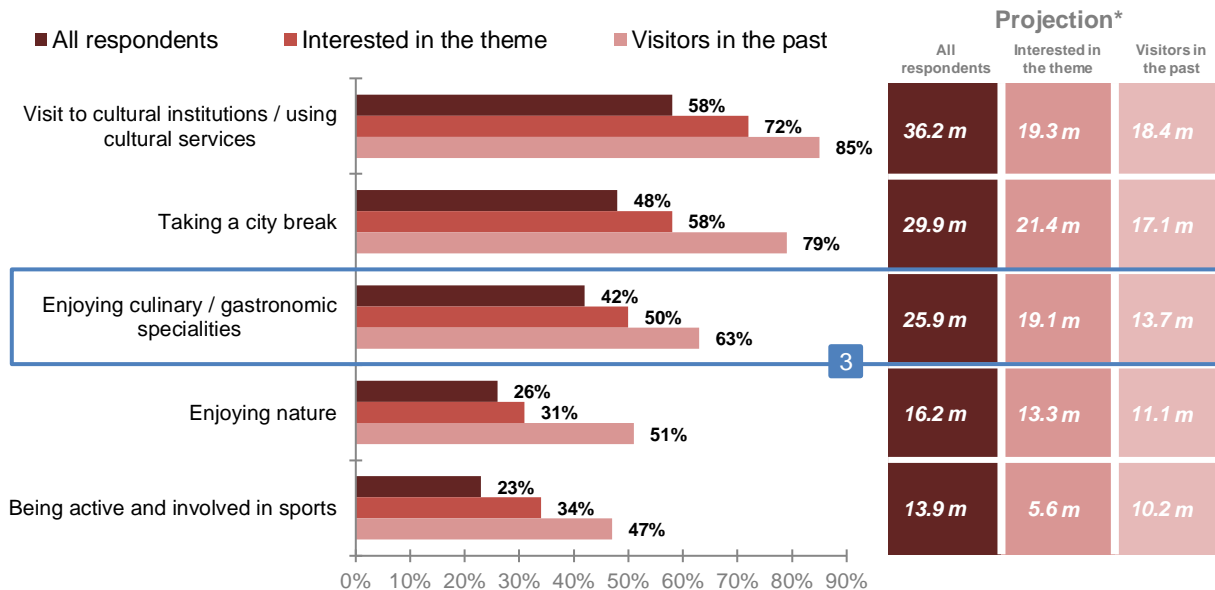
■ Destination XY

Source market: Source market XY

Base: All respondents

Number of respondents: 1,000 **2**

Number of resp. by subgroups: varying



* Projection of the absolute volume of the attributed suitability of each theme (number of people).

Central question: What is the **theme suitability** of destination xy for **the considered theme portfolio** (here the five pre-defined general themes) **among the different subgroups?** – Reading example: “Enjoying culinary / gastronomic specialities”

- ▶ 42% of the represented population consider destination xy as suitable for “enjoying culinary / gastronomic specialities” (see the dark red bar at the top).
- ▶ In comparison to the overall represented population, the subgroup “interested in the theme” (50%) attributes a higher theme suitability to destination xy (see the red bar in the middle).
- ▶ Moreover, destination xy receives the highest theme suitability rating by the subgroup “visitors in the past” (63%, 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 theme suitability for each subgroup.

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

2
The **supported theme suitability** is calculated based on the subgroups “**interested in the theme**” (respondents who are generally interested (i.e., regardless of a specific tourist destination) in the respective holiday activity) as well as “**visitors in the past**” (respondents who have already holidayed in the tourist destination with at least one overnight stay).

9.1 Reading examples – Competition: Comparison with competitors

DESTINATION BRAND 21		Source market: XY		Category: All considered destinations					
Destination XY (N = 1,000)	Number of destinations in category	Base: All respondents				Base: Respondents with interest in the theme			
		own value		mean	rank	own value		mean	rank
		in %	projection*			in %	projection*		
Enjoying culinary / gastronomic specialities	45	42%	25.9 m	34%	16.	50%	19,1 m	42%	17.
Visit to cultural institutions / using cultural services	6	58%	36.2 m	30%	3.	72%	19,3 m	41%	3.
Enjoying nature	45	26%	16.2 m	40%	35.	31%	13,3 m	47%	36.
Being active and involved in sports	45	23%	13.9 m	32%	32.	34%	5,6 m	43%	30.
Taking a city break	45	48%	29.9 m	29%	5.	58%	21,4 m	35%	4.
Visit to events	11	47%	28.8 m	25%	3.	60%	11,8 m	34%	3.
Using luxury offers	7	21%	13.1 m	17%	4.	27%	3,7 m	32%	5.
Undertaking a sustainable holiday trip	13	19%	11.7 m	25%	8.	32%	6,9 m	39%	7.
Cycling (not mountain biking)	23	32%	19.5 m	34%	13.	42%	7,1 m	46%	15.
Shopping	10	51%	31.8 m	32%	2.	63%	15,4 m	41%	2.

* Projection of the absolute volume for supported theme competence (number of people).

► **Note:** Last survey taken into consideration October until December 2021

Central question: How can destination xy position itself per theme in the **competitive ranking** in the category “all considered destinations”? – Reading example: “Enjoying culinary / gastronomic specialities”

- 42% of the represented population consider destination xy as suitable for the holiday activity “Enjoying culinary / gastronomic specialities” (see column “own value in %”). Compared to the average of 34% (see column “mean”), destination xy positions itself above average and ranks 16th out of 45 (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 evaluation results based on the “respondents with interest in the theme”. Even though destination xy receives a higher suitability rating for the theme “Enjoying culinary / gastronomic specialities” by this subgroup of 50% (see column “own value in %”), the achieved rank (17th out of 45; see column “rank”) is a bit lower.

The results for the supported theme suitability can be compared based on **different categories of competitors**. In this example, the results refer to the category “all considered destinations”.

This overview is based on “all respondents” and “respondents with interest in the theme”.

In this example, a total of 45 tourist destinations were investigated. In the case of the specific themes, the **number of considered destinations varies**, which needs to be taken into account in the interpretation of the results.

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).

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

9.1 Reading examples – Summary: Quadrant analysis

Quadrant analysis Destination XY

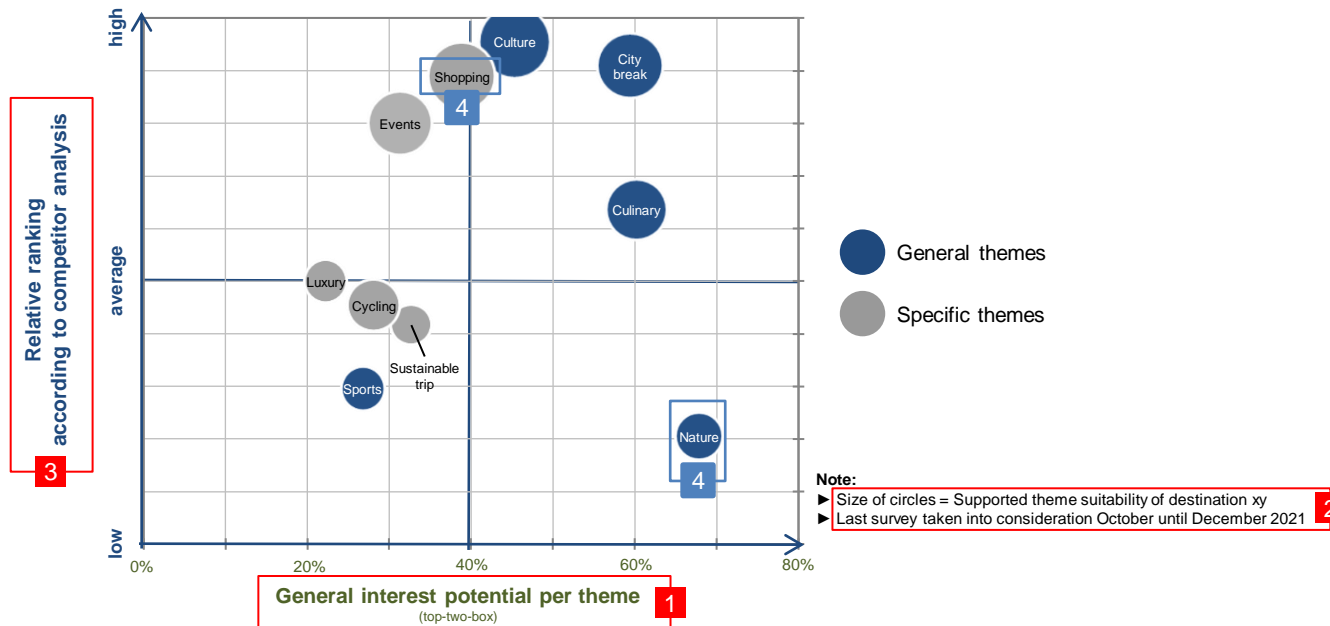
> Category for relative ranking according to competitor analysis:
All considered destinations (up to 45 tourist destinations per theme)

■ Destination XY

Source market: Source market XY

Base: All respondents

Number of respondents: 1,000



“Demand”: The **general interest potential** per theme is expressed by the theme’s position on the X-axis (horizontal). The greater the interest in the respective holiday activity, the further to the right the theme is placed on the axis.

“Supply”: The attributed **theme suitability** of destination xy is represented by the respective size of the “theme circle”. The larger the “theme circle”, the higher the approval of suitability by the respondents for the theme.

“Competition”: The **relative competitive ranking** of destination xy in the category “all considered destinations per theme” is depicted by the position of the respective theme on the Y-axis (vertical). The better destination xy performs in the competitive comparison per theme, the higher up the theme is placed on the axis.

Central question: How can the **central results of the three-dimensional competitive analysis** be visually summarised?

– Reading example: “Nature” & “Shopping”

► The theme “Nature” has a very high general interest potential (see position far right on the X-axis). However, destination xy is attributed a relatively low theme suitability (see smaller “theme circle”), which means that destination xy positions itself below average in the competitor analysis (see position in the lower part of the Y-axis).

► On the other hand, the general interest potential of the represented population for the theme “Shopping” is much lower (see position in the middle of the X-axis). Though, destination xy is considered as very suitable for the theme (see bigger “theme circle”) and consequently achieves a high relative competitive ranking (see position in the upper part of the Y-axis).

9.1 Reading examples –

Supply: Supported theme suitability – Sociodemographic differentiation

Supported theme suitability of the general themes

> In your opinion, to what extent is the following domestic tourist destination suitable for the holiday activities below (regardless of your own interest in the holiday activities)?

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

■ Destination XY

Source market: Source market XY

Sociodemography: Age group **2**

Base: All respondents

Number of respondents: 1,000

General themes	total	Altersklasse						Significance* (Kruskal-Wallis-test)
		14-24 y.	25-34 y.	35-44 y.	45-54 y.	55-64 y.	65-74 y.	
Enjoying culinary / gastronomic specialties	42%	27%	32%	42%	55%	53%	43%	sig.
Visit to cultural institutions / using cultural services	58%	39%	45%	56%	72%	68%	65%	sig.
Enjoying nature	26%	23%	25%	27%	29%	28%	24%	n.s.
Being active and involved in sports	23%	34%	29%	25%	21%	19%	17%	sig.
Taking a city break	48%	42%	45%	48%	52%	49%	46%	n.s.

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

Central question: What are the **differences between age groups** with regard to the theme suitability of destination xy?

– Reading example: “Enjoying culinary / gastronomic specialties”

- ▶ The results by age group are among others significant in the case of the holiday activity “Enjoying culinary / gastronomic specialties” (see column “Significance”). Subsequently, the results can be applied to the general population.
- ▶ In the case of the theme “Culinary” the approval rates regarding the theme suitability by the “45-54 year-olds” (55%) and the “55-64 year-olds” (53%) are clearly above the average of all respondents (42%), while only 27% of the “14-24 year-olds” and 32% of the “25-34 year-olds” consider destination xy as suitable to enjoy culinary / gastronomic specialties.

In each case, the **top-two-box values** are shown, i.e., the value refers to all respondents that answered the question with “5 = very suitable” or the value “4”.

In addition to the univariate evaluation results, several **bivariate analyses** are part of the report. Among others, the approval rates regarding the theme suitability are differentiated by eight **socio-demographic factors**, in this example “age group”.

In case of the criterion “age group” the approval rates can be differentiated by **six age cohorts**.

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%.

9.1 Reading examples – Supply: Supported theme suitability – Standard target group analysis

Supported theme suitability for the holiday activity:

“Enjoying culinary / gastronomic specialties”

> In your opinion, to what extent is the following domestic tourist destination suitable for the holiday activities below (regardless of your own interest in the holiday activities)?

> Top-two-box on a scale from “5 = very suitable” to “1 = not at all suitable” (in % of respondents) ¹

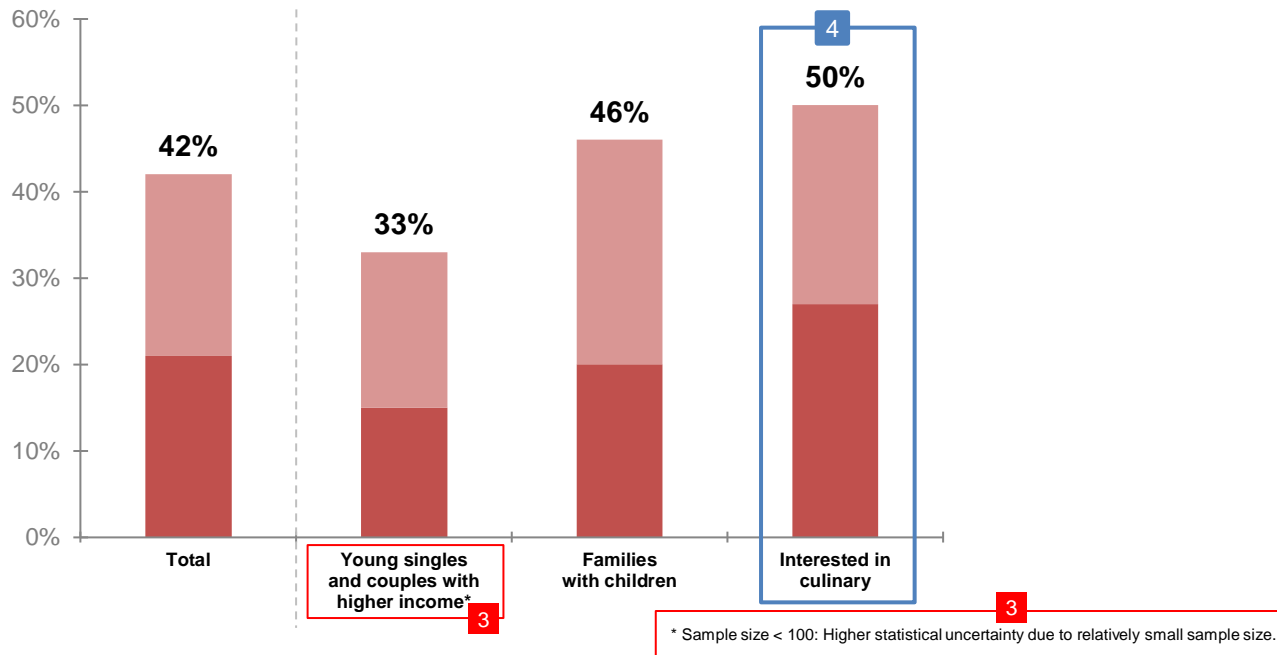
■ Destination XY

Source market: Source market XY

Segmentation: Target groups ²

Base: All respondents

Number of respondents: 1,000



Central question: Among which **target group** does destination xy achieve the **highest approval** regarding the theme suitability for the holiday activity “Enjoying culinary / gastronomic specialties”?

- ▶ In this example, the three target groups “Young singles and couples with higher income”, “Families with children” and “Interested in culinary” are considered.
- ▶ Among the three target groups, the respondents being “Interested in culinary” (50%) awarded destination xy the highest theme suitability for the holiday activity “Enjoying culinary / gastronomic specialties”. Their approval rate is clearly above the average of all respondents (42%).

¹ For each target group, the **top-two-box values** are shown, i.e., the values refer to all respondents that answered the question with “5 = very suitable” or the value “4”.

² In addition to the univariate evaluation results, several bivariate analyses are part of the report. Among others, the approval rates regarding the theme suitability 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 holiday activities as well as a combination of these aspects. 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 income”, the number of cases is below 100, which means that a **higher level of statistical uncertainty** needs to be taken into consideration.

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9.2 Glossary – Content of the theme competence study

Content of the theme competence study

General interest potential	The proportion of the represented population that is generally interested (i.e., regardless of a specific tourist destination) in the respective holiday activity (responses of the top-two-box on a rating scale for assessment of the general interest potential)
Supported theme suitability	The proportion of the represented population that considers the tourist destination to be suitable for the respective holiday activity – regardless of one's own interest in the holiday activity concerned (responses of the top-two-box on a rating scale for assessment of the theme suitability)
Unsupported theme suitability (top of mind)	The proportion of the represented population that spontaneously considers the tourist destination to be particularly suitable for the respective type of holiday without being provided answer options

Sub-groups

Suitability assessor	Respondents who consider the tourist destination to be suitable for the respective holiday activity (top-two-box value) – regardless of their own interest in the holiday activity concerned
Distinct intention to travel abroad	Respondents who definitely (top value) intend to spend a short holiday trip (with 1 – 3 overnight stays) <u>and / or</u> a longer holiday trip (with 4 or more overnight stays) abroad within the next 3 years
Interested in the theme	Respondents who are generally interested (i.e., regardless of a specific tourist destination) in the respective holiday activity (top-two-box value)
Visitors in the past	Respondents who have already holidayed in the tourist destination (with at least one overnight stay)

9.2 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.

9.2 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.

9.2 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.

9.2 Glossary – Description of holiday activities Destination Brand 21

Description of holiday activities per question (part 1 of 3)				
No.	Short version in report	General interest potential per holiday activity ➤ Original description according to questionnaire	Unsupported theme suitability (top of mind) ➤ Original description according to questionnaire	Supported theme suitability per destination ➤ Original description according to questionnaire
1	Culinary	Enjoying culinary / gastronomic specialties	Going on a culinary trip	Enjoying culinary / gastronomic specialties
2	Culture	Visiting cultural institutions / using cultural services	Going on a cultural holiday / a cultural trip	Visit to cultural institutions / using cultural services
3	Nature	Enjoying nature	Going on a nature holiday	Enjoying nature
4	Sports	Being active and involved in sports	Going on an active sports holiday	Being active and involved in sports
5	City break	Taking a city break	Going on a city break	Taking a city break
6	Barrier-free holiday trip	Undertaking a barrier-free holiday trip		Undertaking a barrier-free holiday trip
7	Bauhaus	Experiencing Bauhaus and architecture of Classical Modernism		Experiencing Bauhaus and architecture of Classical Modernism
8	Camping	Taking a camping holiday / caravanning holiday / motorhome holiday		Taking a camping holiday / caravanning holiday / motorhome holiday
9	Castles	Visiting castles, palaces and cathedrals		Visit to castles, palaces and cathedrals
10	Castles / gardens	Visiting castles, mansions, parks and gardens		Visit to castles, mansions, parks and gardens
11	Castles / mansions	Visiting castles and mansions		Visit to castles and mansions
12	Christmas markets	Visiting Christmas markets		Visit to Christmas markets
13	City break with active recreation	Taking a city break with active recreation (e.g., on / in the water, cycling, hiking)		Taking a city break with active recreation (e.g., on / in the water, cycling, hiking)
14	(Small) city flair	Enjoying the (small) city flair / atmosphere		Enjoying the (small) city flair / atmosphere
15	Countryside	Spending holidays in the countryside (e.g., on the farm or vineyard)		Spending holidays in the countryside (e.g., on the farm or vineyard)
16	Culture- / music festivals	Attending culture- / music festivals		Attending culture- / music festivals
17	Cycling	Cycling (not mountain biking)		Cycling (not mountain biking)
18	Events	Attending events		Attending events
19	Families	Using family offers		Using family offers
20	Film locations	Visiting film locations		Visit to film locations
21	Footsteps of Martin Luther	Tracing the footsteps of Martin Luther		Tracing the footsteps of Martin Luther
22	Gardens / parks	Visiting gardens / parks		Visit to gardens / parks
23	Golf	Playing golf (not minigolf)		Playing golf (not minigolf)

Source: inspektour (international) GmbH, 2021

9.2 Glossary – Description of holiday activities Destination Brand 21

Description of holiday activities per question (part 2 of 3)				
No.	Short version in report	General interest potential per holiday activity ➤ Original description according to questionnaire	Unsupported theme suitability (top of mind) ➤ Original description according to questionnaire	Supported theme suitability per destination ➤ Original description according to questionnaire
24	Health	Using health services (self-paying, not a prescribed visit to a health spa)		Using health services (self-paying, not a prescribed visit to a health spa)
25	Hiking	Hiking		Hiking
26	Industrial heritage	Visiting industrial heritage sites (e.g., factories, (coal) mines, museums of industrial heritage)		Visit to industrial heritage sites (e.g., factories, (coal) mines, museums of industrial heritage)
27	Lively places	Experiencing lively places (e.g., trendy shopping districts, festivals, alternative cultural circles, night life)		Experiencing lively places (e.g., trendy shopping districts, festivals, alternative cultural circles, night life)
28	Luxurious shopping	Luxurious shopping		Luxurious shopping
29	Luxury offers	Using luxury offers		Using luxury offers
30	Mountain biking	Mountain biking		Mountain biking
31	Museums	Visiting museums / exhibitions / art museums		Visit to museums / exhibitions / art museums
32	Relaxation	Relaxing and resting		Relaxing and resting
33	Riding	Horseback riding		Horseback riding
34	Sailing	Sailing		Sailing
35	Shopping	Shopping		Shopping
36	Study / educational offers	Using study / educational offers		Using study / educational offers
37	Sustainable trip	Undertaking a sustainable holiday trip (nature preserving / environmentally friendly, economically and socially fair)		Undertaking a sustainable holiday trip (nature preserving / environmentally friendly, economically and socially fair)
38	Swimming / beach	Swimming and being at the beach		Swimming and being at the beach
39	Traditional folk events	Attending traditional folk events (e.g., marksmen's festivals, carnivals, fairs)		Attending traditional folk events (e.g., marksmen's festivals, carnivals, fairs)
40	UNESCO world heritage sites	Visiting UNESCO world heritage sites		Visit to UNESCO world heritage sites
41	Volunteer / voluntary work	Performing volunteer / voluntary work (supporting a social or environmental project)		Performing volunteer / voluntary work (supporting a social or environmental project)
42	Water sports	Practising water sports (not sailing)		Practising water sports (not sailing)
43	Water-based holiday activities	Enjoying water-based holiday activities		Enjoying water-based holiday activities
44	Wellness	Using wellness services		Using wellness services
45	Wine tour	Taking a wine tour (e.g., wine tasting, visiting wine festivals, vineyard walks, participating in the grape harvest)		Taking a wine tour (e.g., wine tasting, visiting wine festivals, vineyard walks, participating in the grape harvest)
46	Winter sports	Practising winter sports (e.g., cross-country skiing, downhill)		Practising winter sports (e.g., cross-country skiing, downhill)

Source: inspektour (international) GmbH, 2021

9.2 Glossary – Description of holiday activities Destination Brand 21

Description of holiday activities per question (part 3 of 3)				
No.	Short version in report	General interest potential per holiday activity ➤ Original description according to questionnaire	Unsupported theme suitability (top of mind) ➤ Original description according to questionnaire	Supported theme suitability per destination ➤ Original description according to questionnaire
47	Beach lounges / beach bars	Visiting beach lounges / beach bars (having small snacks and drinks, relaxing, chilling directly by the sea)		Visit to beach lounges / beach bars (having small snacks and drinks, relaxing, chilling directly by the sea)
48	Classical seaside resort architecture	Experiencing classical seaside resort architecture		Experiencing classical seaside resort architecture
49	Contemporary / Modern Culture	Experiencing Contemporary / Modern Culture		Experiencing Contemporary / Modern Culture
50	Contemporary history of the 20th century	Visiting places of contemporary history of the 20th century		Visit to places of contemporary history of the 20th century
51	Cosy winter holiday trip	Taking a cosy winter holiday trip (even without snow, e.g., slow down, time out, walks, some wellness)		Taking a cosy winter holiday trip (even without snow, e.g., slow down, time out, walks, some wellness)
52	Dark sky places	Visiting dark sky places (i.e., protected landscape areas with particularly clear views of the sky at night)		Visit to dark sky places (i.e., protected landscape areas with particularly clear views of the sky at night)
53	Fairy tales / legends	Experiencing fairy tales and legends		Experiencing fairy tales and legends
54	Holiday trip by bus	Taking a holiday trip by bus		Taking a holiday trip by bus
55	Inline skating / skating	Inline skating / skating		Inline skating / skating
56	Japanese culture / gastronomy	Experiencing Japanese culture / gastronomy		Experiencing Japanese culture / gastronomy
57	Tradition and craft	Experiencing tradition and craft		Experiencing tradition and craft
58	Way of St. James	Walking the Way of St. James		Walking the Way of St. James
59	Regional products / specialties	Discovering regional products / enjoying regional specialties		Discovering regional products / enjoying regional specialties
60	Business trip and holiday	Combining a business trip with a holiday		Combining a business trip with a holiday

Note 1: Holiday themes no. 47 to 58 were surveyed exclusively in the source market Germany.

Note 2: Holiday theme no. 59 was surveyed in the source markets Germany and Spain.

Note 3: Holiday theme no. 60 was surveyed exclusively in the source market China.

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IMPRINT

9.3 Margin of error

Confidence probability **95%**

	Sample size n=												Sample size	Confidence interval limits	
	100	200	300	500	1,000	1,500	2,000	3,000	5,000	8,000	9,000	10,000	1,000	lower	higher
Share in %:	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

9.3 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 theme suitability of the tourist destination "Navarra" on the source market Spain 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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9.1 Reading examples

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9.3 Margin of error

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

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9.4 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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9.4 List of literature regarding the general overview of the study series Destination Brand

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Meffert, H. and Burmann, C. (2013): Wandel in der Markenführung – vom instrumentellen zum identitätsorientierten Markenverständnis. In: Meffert, H., Burmann, C. and Koers, M. (eds.) (2013): Markenmanagement. Identitätsorientierte Markenführung und praktische Umsetzung. Mit Best Practice-Fallstudien.- 2nd, completely revised and extended edition, Wiesbaden, pp. 19-36.

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

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