DESTINATION BRAND goes international: Measuring the customer-oriented perception of destination brands on a national and international scale

Ellen Böhling, inspektour
Anne Köchling, FH Westküste

Berlin, 08.03.2018
Outline

► Research team and partner
► Short introduction of research background and topic
► Study series Destination Brand in Germany
► Introduction of Destination Brand in other countries
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► Study series Destination Brand in Germany
► Introduction of Destination Brand in other countries
DESTINATION BRAND I Team

Project management: inspektour
About inspektour

- Founded in 2002
- Management consultancy and tourism research, principally for holiday destinations
- Since 2002: Cooperation with the FH Westküste / University of Applied Sciences
- Since 2014 project management and implementation of DESTINATION BRAND in Germany
- Since 2015 an internationally operating company too – focus on tourism research and DESTINATION BRAND
- About 15 years of experience in tourism research and development
DESTINATION BRAND I Team

Project management: inspektour  Academic partner: FH Westküste
About the Institute for Management and Tourism at FH Westküste

► Founded in 2006 as an internal institute at the FH Westküste / University of Applied Sciences in Heide, Germany

► Projects for and in co-operation with the industry as well as publicly funded projects

► Initiation and implementation of Destination Brand study series in Germany from 2009-2014

► Scientific accompaniment of the project and financial support for set up and basic research

► Gaining detailed knowledge on modern destination brand management for assuring a high-level qualification of students
DESTINATION BRAND I Team

Project management: inspektour
Academic partner: FH Westküste

Academic partner Netherlands: Stenden

Competence partner: Deutschland

Industry partner: SACHSEN. LAND VON WELT.
Outline

► Research team and partner
► **Short introduction of research background and topic**
► Study series Destination Brand in Germany
► Introduction of Destination Brand in other countries
Concept of identity based brand management

Self-image held by internal target groups

Brand identity

Brand-customer-relationship

Public image held by external target groups

Brand image

Realizing and avoiding dissonances

Brand identity:
Desired public image

Brand image:
Real public image

Picture: shutterstock.com
Understanding the core values of the destination and its brand, how relevant the brand is to tourists in relevant source markets and how it compares with major competitors.

How does the holiday destination stand out?

Picture: shutterstock.com
Outline

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**Destination Brand in Germany**

Study series in a 3-year-circle

<table>
<thead>
<tr>
<th>Brand value</th>
<th>Theme competence</th>
<th>Image / Profiles</th>
</tr>
</thead>
<tbody>
<tr>
<td>09</td>
<td>10</td>
<td>11</td>
</tr>
<tr>
<td>12</td>
<td>13</td>
<td>14</td>
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<td>15</td>
<td>16</td>
<td>17</td>
</tr>
</tbody>
</table>

Source: TIRC Network GmbH / Institut für Management und Tourismus (IMT)
Methodology and special features

- **Online-survey**: quota sample (sample size per destination: 1,000)
- **Representative** of the German-speaking population aged 14 to 74 years and living in private households (projection possible)
- **Wide destination pool** (more than 100 destinations per study)
- **Same survey** design over the years (comparative)
Destination Brand / study content

Brand value

Source: TIRC Network GmbH / Institut für Management und Tourismus (IMT)
Destination Brand / the method 1st year: Four-dimensional brand analysis

Findings for the Ruhr Area

- **Awareness as holiday destination**: 79%
- **Likeability (Top-Two-Box)**: 40%
  - TR 1: 51%
  - TR 2S: 55%
  - TR 2L: 35%
- **Willingness to visit (Top-Two-Box)**: 14%
  - S: 22%
  - L: 14%
- **Visit in the past**
  - Prospective: 27%
    - Within last 3 years: 13%
    - More than 3 years ago: 15%
  - Retrospective: 27%
    - Within last 3 years: 13%
    - More than 3 years ago: 15%

Number of cases: 1,000 / Basis: all respondents

* Deviations to the sum of the single values are due to the multiple answer option in terms of the time of the visit in the past.

Source: inspektour GmbH, 2015
Brand funnel time comparison – Findings for the Ruhr Area

DESTINATION BRAND 15

<table>
<thead>
<tr>
<th>Awareness as holiday destination</th>
<th>Likeability (Top-Two-Box)</th>
<th>Willingness to visit (Top-Two-Box)</th>
</tr>
</thead>
<tbody>
<tr>
<td>TR 1 51%</td>
<td>TR 2S 55%</td>
<td>S 22%</td>
</tr>
<tr>
<td></td>
<td>TR 2L 35%</td>
<td>L 14%</td>
</tr>
</tbody>
</table>

DESTINATION BRAND 12

<table>
<thead>
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<th>Awareness as holiday destination</th>
<th>Likeability (Top-Two-Box)</th>
<th>Willingness to visit (Top-Two-Box)</th>
</tr>
</thead>
<tbody>
<tr>
<td>TR 1 51%</td>
<td>TR 2S 48%</td>
<td>S 19%</td>
</tr>
<tr>
<td></td>
<td>TR 2L 30%</td>
<td>L 12%</td>
</tr>
</tbody>
</table>

DESTINATION BRAND 09

<table>
<thead>
<tr>
<th>Awareness as holiday destination</th>
<th>Likeability (Top-Two-Box)</th>
<th>Willingness to visit (Top-Two-Box)</th>
</tr>
</thead>
<tbody>
<tr>
<td>TR 1 42%</td>
<td>TR 2S 38%</td>
<td>S 12%</td>
</tr>
<tr>
<td></td>
<td>TR 2L 16%</td>
<td>L 5%</td>
</tr>
</tbody>
</table>

Number of respondents: n = at least 1,000 / Basis: all respondents

Source: Institut für Management und Tourismus (IMT), 2009 / 2012; inspektour GmbH, 2015

„DESTINATION BRAND goes international“ | 08.03.2018, ITB Berlin
Destination Brand / study content

Themes = types of holidays / activities

Brand value

Theme competence

Source: TIRC Network GmbH / Institut für Management und Tourismus (IMT)
Destination Brand / the method 2nd year: Central research questions

General interest in different types of holidays / activities

Perceived core competences (types of holidays / activities)

Competitor analysis (benchmark)

Source: Institut für Management und Tourismus (IMT)

Pictures: shutterstock.com
Example findings for the Ruhr Area

Overview of three-dimensional analysis Ruhr Area

- Category for relative ranking according to competitor analysis: all destinations analysed (up to 172 competitors)

Ruhr Area

Basis: All respondents
Number of respondents: 1,000

General interest in demand per touristic marketing theme

Source: Inspektour GmbH 2016

Note:
➤ Size of theme circles = Aided theme competence Ruhr Area
➤ Last survey period taken into consideration in November / December 2016

Picture: shutterstock.com
Destination Brand / study content

Brand value

Theme competence

Image / Profiles

Source: TIRC Network GmbH / Institut für Management und Tourismus (IMT)
How do Destination Manager make use of the data?

- Monitoring of image over-time
- Support in stakeholder discussions
- Definition of marketing tools and projects (for example for EU funding)
- Strategic management
Outline

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Closing data gaps with Destination Brand

- Lack of detailed, representative data on the perception of regional / city destinations
  - in domestic holiday contexts in several countries (e.g. attributed types of holidays to Bern from the Swiss perspective)
  - in international contexts (e.g. awareness of the Black Forest as a holiday destination in China)

- Generally:
  - lack of research over time
  - lack of competitive research / benchmarking
We start with DESTINATION BRAND in 4 source markets
Countries in which the introduction of DESTINATION BRAND is planned, too:

- **Canada**
- **USA**
- **Norway**
- **UK**
- **France**
- **Spain**
- **Finland**
- **Italy**

- Expected in 2019
- Expected from 2020 - 2022
DOMESTIC evaluation and comparison possibilities in 2018

<table>
<thead>
<tr>
<th>Survey about: Tourist destinations of</th>
<th>DOMESTIC evaluation and comparison possibilities in 2018</th>
<th>DESTINATION BRAND countries</th>
<th>Survey takes place in:</th>
<th>DOMESTIC comparison options in each source market</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>GER</td>
<td>AUT</td>
<td>SUI</td>
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<td></td>
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<td>X</td>
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</tr>
<tr>
<td>Austrian population will be asked to evaluate the brand value / theme competence of Austrian tourist destinations</td>
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</tbody>
</table>

Austrian population will be asked to evaluate the brand value / theme competence of Austrian tourist destinations.
Additional evaluation options on an INTERNATIONAL scale
**INTERNATIONAL evaluation and comparison possibilities in 2018**

<table>
<thead>
<tr>
<th>Survey about: Tourist destinations of</th>
<th>DESTINATION BRAND countries Survey takes place in:</th>
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<tbody>
<tr>
<td>German population will be asked to evaluate the brand value / theme competence of DOMESTIC and INTERNATIONAL tourist destinations</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Germany</th>
<th>Austria</th>
<th>Switzerland</th>
<th>China</th>
<th>The Netherlands</th>
</tr>
</thead>
<tbody>
<tr>
<td>Germany</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
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<td>X</td>
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<td>X</td>
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<tr>
<td>The Netherlands</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
</tbody>
</table>
Example for a DOMESTIC and INTERNATIONAL comparison of research findings

- Theme competence of **Austrian destinations and the Black Forest** from the perspective of the **German population** for the theme “Exercise winter sports (e.g. skiing, cross-country skiing)"

![Bar chart showing the theme competence of various destinations.](chart)

- **Tirol**: 73%
- **Kärnten**: 55%
- **Schwarzwald**: 53%
- **Salzburger Land**: 52%
- **Vorarlberg**: 47%
- **Steiermark**: 45%

* Average value for considered holiday destination regarding the theme „exercise winter sports (e.g. skiing, cross-country skiing)"

Source: Institut für Management und Tourismus (IMT), 2013
INTERNATIONAL evaluation and comparison possibilities in 2018

<table>
<thead>
<tr>
<th>DESTINATION BRAND countries</th>
<th>Survey takes place in:</th>
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<tbody>
<tr>
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<tr>
<td>Netherlands</td>
<td></td>
</tr>
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Survey about:
Tourist destinations of

Country A In 2018: Tourist destinations from other countries

In 2018:
Integration of further international tourist destinations
INTERNATIONAL evaluation and comparison possibilities in 2018

**DESTINATION BRAND countries**
Survey takes place in:

<table>
<thead>
<tr>
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</table>

**Source market B**

<table>
<thead>
<tr>
<th>Country A</th>
</tr>
</thead>
<tbody>
<tr>
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</tr>
<tr>
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</tr>
<tr>
<td>China</td>
</tr>
<tr>
<td>Netherlands</td>
</tr>
</tbody>
</table>

Survey about: Tourist destinations of Country A

In 2018: Tourist destinations from other countries

From 2019 on: Integration of further source markets

In 2019: Further DB countries
DESTINATION BRAND 2018 I summary

Data on:
(national and international scale)

Brand value  or  Theme competence  or  Brand value  +  Theme competence

and:
BENCHMARK / competitor analysis  

DOMESTIC & INTERNATIONAL scale

Market position

from:
and /  or  and /  or  and /  or  and /  or

(national and international scale)
Time schedule and further information on the upcoming study in 2018:

<table>
<thead>
<tr>
<th>Time schedule</th>
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<tbody>
<tr>
<td>Registration:</td>
</tr>
<tr>
<td>Field work:</td>
</tr>
<tr>
<td>Delivery of results:</td>
</tr>
</tbody>
</table>

Further conditions

Results are delivered:
- By E-Mail
- Individual report for each participating destination

Have a look at our report example right here
Time schedule and further information on the upcoming study in 2018:

<table>
<thead>
<tr>
<th>Survey in</th>
<th>Germany</th>
<th>Austria</th>
<th>China</th>
<th>Netherlands</th>
<th>Switzerland</th>
</tr>
</thead>
<tbody>
<tr>
<td>Survey about</td>
<td>net price per destination per source market</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Brand value</td>
<td>3.500,- EUR</td>
<td>3.900,- EUR</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Theme competence</td>
<td>3.500,- EUR</td>
<td>3.900,- EUR</td>
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</tbody>
</table>
Questions?

- Please feel free to talk to us directly after the presentation.
- Back home: Please contact us per E-Mail or telephone at any time.
- Let’s meet again – We would be glad to organise an information event to present DESTINATION BRAND in your home country.
Thank you for listening!
For more information go to: www.destination-brand.com
For further reading on the theory…