



DESTINATION BRAND 23

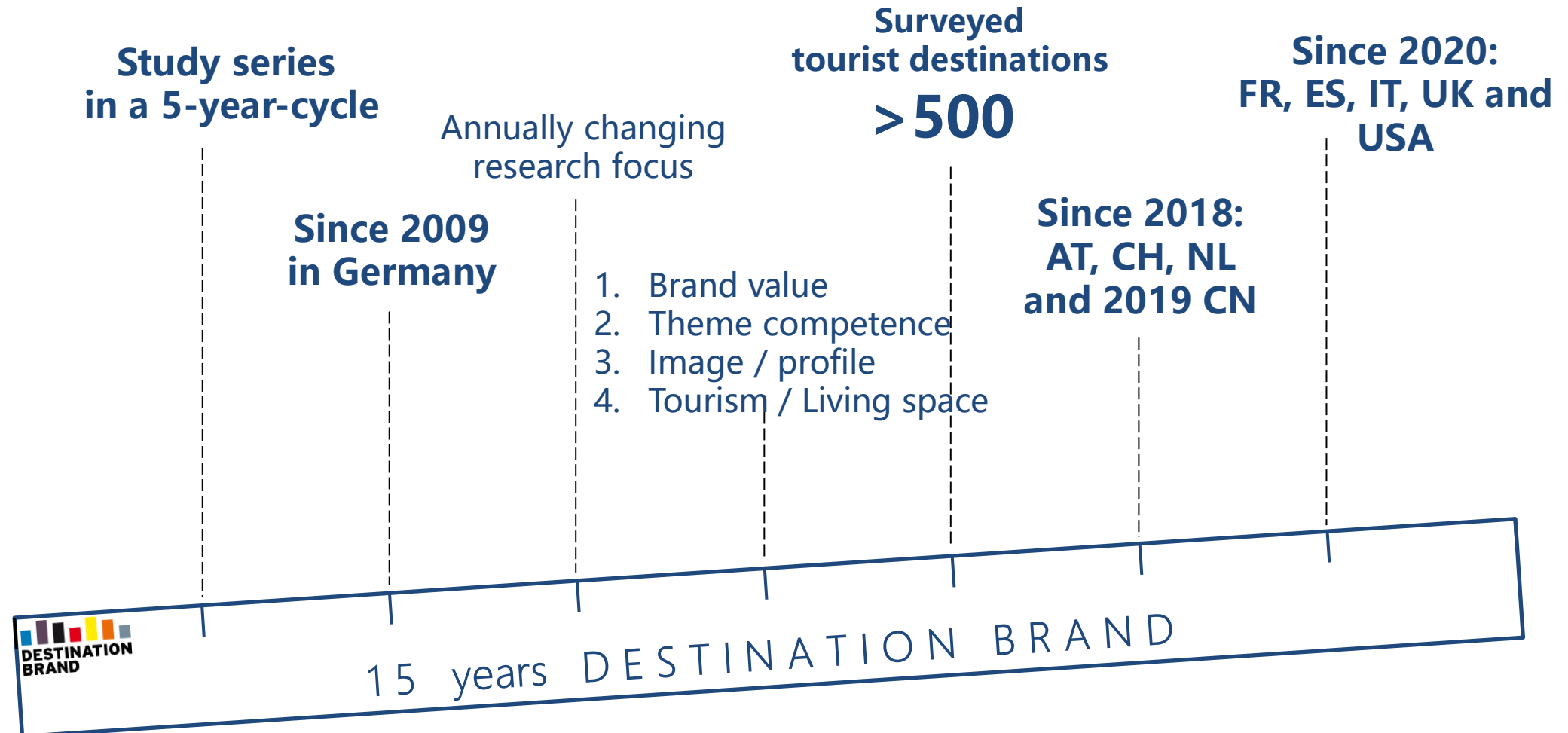
Relevance + interest in digital tourism offerings
(AR + VR) + presentation of digital user types

PRESENTATION OF SELECTED KEY RESULTS FROM ALL 10 SOURCE MARKETS

Destination Brand – inspektour



The study series DESTINATION BRAND



What can you expect today?

DESTINATION BRAND 23 at a glance

Presentation of selected key results "Relevance + interest in digital tourism offerings (AR + VR)" from all 10 Destination Brand source markets

Q&A

DESTINATION BRAND 23

at a glance:

The image of destinations as
tourism and living spaces

DESTINATION BRAND 23 at a glance

**Module 1:
offers +
infrastructure**

**Module 1a:
digital
tourism offerings**

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

10 source markets

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

**> 150
tourist destinations**

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

Online survey
Field work: Oct. till Dec. 23



15 years DESTINATION BRAND

Overview of the considered tourist destinations

	DE	AT	CH	NL	CN	FR	IT	ES	UK	US
1. Allgäu	■									
2. Alsace	■									
3. Amsterdam	■									
4. Antwerp	■									
5. Augsburg	■									
6. Austria	■				■		■			■
7. Baden-Baden	■									
8. Baden-Württemberg	■	■	■	■						
9. Baltic Resort Binz	■									
10. Baltic Resort Kühlungsborn	■									
11. Baltic Sea	■									
12. Baltic Sea Schleswig-Holstein	■									
13. Baltic Seaside Resort Graal-Müritz	■									
14. Basel	■									
15. Bavaria	■									
16. Bavarian Forest	■									
17. Berlin	■									
18. Black Forest	■									
19. Bonn	■									
20. Borkum	■									
21. Brandenburg	■									
22. Bremen	■									
23. Bremerhaven	■									
24. Burgenland	■									
25. Carinthia	■									
26. Chiemgau - Chiemsee	■									
27. City of Luxembourg	■									
28. Cologne	■									
29. Copenhagen	■									
30. Cottbus - Spreewald	■									
31. Croatia	■						■			
32. Denmark	■				■		■		■	■
33. Dresden	■									
34. Dresden Elbland	■									
35. Duisburg	■									
36. Düsseldorf	■									
37. East Frisian Islands	■									
38. Eifel	■			■						
39. Erfurt	■									
40. Fichtel Mountains	■									

	DE	AT	CH	NL	CN	FR	IT	ES	UK	US
41. Finland	■				■				■	■
42. Flanders	■	■	■	■		■	■	■	■	
43. Föhr	■									
44. France	■						■	■		
45. Franconia	■									
46. Franconian Lake District	■									
47. Frankfurt on the Main	■									
48. FrankfurtRhineMain	■									
49. Freiburg in the Breisgau	■	■	■							
50. Garmisch-Partenkirchen	■									
51. Germany	■	■	■	■	■	■	■	■	■	■
52. Great Britain	■							■		
53. Greece	■						■			
54. GrimmHome NorthHesse	■									
55. Halle (Saale)	■									
56. Hamburg	■									
57. Hanover	■									
58. Harz	■									
59. Havelland	■									
60. Heidelberg	■	■								
61. Hesse	■	■								
62. Holiday region Bernkastel-Kues - Moselle	■									
63. Iceland	■				■				■	■
64. Imperial Seaside Resorts	■									
65. Ireland	■									
66. Italy	■							■		
67. Karlsruhe	■					■			■	
68. Kassel	■									
69. Kiel	■									
70. Koblenz	■									
71. Lake Constance	■	■	■							
72. Lake Starnberg	■									
73. Leipzig	■									
74. Leipzig New Lake District	■									
75. Lower Austria	■									
76. Lower Saxony	■									
77. Lübeck.Travemünde	■									
78. Lüneburg Heath	■									
79. Lusatian Lake District	■	■	■	■		■	■	■	■	■
80. Luxembourg	■									

Note: The source markets in which the respective destination was surveyed as part of the Destination Brand 23 study are marked in green.



Overview of the considered tourist destinations

	DE	AT	CH	NL	CN	FR	IT	ES	UK	US
81. Magdeburg	■									
82. Mainz	■									
83. Mecklenburg Lake District	■									
84. Mecklenburg-Western Pomerania	■									
85. Metz	■									
86. Monaco	■		■		■	■	■	■	■	■
87. Moselle	■									
88. Munich	■									
89. Münsterland	■									
90. Netherlands	■					■		■		■
91. Norderney	■									
92. North Rhine-Westphalia	■									
93. North Sea	■									
94. North Sea Island Amrum	■									
95. North Sea Land Dithmarschen	■									
96. Norway	■				■				■	■
97. Nuremberg	■									
98. Oberstauften	■									
99. Oder-Spree Lake District	■									
100. Ore Mountains	■									
101. Oslo	■									
102. Osnabrücker Land	■			■						
103. Palatinate	■									
104. Portugal	■							■		
105. Potsdam	■									
106. Region Stuttgart	■	■	■	■		■				
107. Rhineland-Palatinate	■									
108. Rhön	■									
109. Rostock-Warnemünde	■									
110. Rothenburg ob der Tauber	■									
111. Rügen Island	■									
112. Ruhr Valley	■			■						
113. Ruppın Lake District	■									
114. Saale-Unstrut	■									
115. Saarbrücken	■					■				
116. Saarland	■									
117. Salzburger Land	■									
118. Sauerland	■									
119. Saxonian Switzerland-Elbe Sandstone Mountains	■									
120. Saxony	■	■								

	DE	AT	CH	NL	CN	FR	IT	ES	UK	US
121. Saxony-Anhalt	■									
122. Schleswig-Holstein	■									
123. Schwerin	■									
124. South Tirol	■		■	■						
125. Spain	■				■		■			
126. Spessart	■									
127. Spreewald	■									
128. St. Peter-Ording	■									
129. Stockholm	■									
130. Stuttgart	■									
131. Styria	■									
132. Swabian Alb	■									
133. Sweden	■				■				■	■
134. Switzerland	■				■		■			■
135. Sylt	■									
136. Taunus	■									
137. Teutoburg Forest	■									
138. the Prignitz	■									
139. Thuringia	■	■								
140. Thuringian Forest	■									
141. Tirol	■									
142. Trier	■									
143. Uckermark	■									
144. Upper Austria	■									
145. Upper Bavaria	■									
146. Upper Lusatia	■									
147. Upper Palatinate Forest	■									
148. Usedom Island	■									
149. Vienna	■									
150. Vogtland	■									
151. Vorarlberg	■		■	■						
152. Wallonia	■					■		■		
153. Weimar	■									
154. Weserbergland	■									
155. Wiesbaden	■									
156. Winterberg	■									
157. Zugspitze region	■									
158. Zurich	■				■					■

Note: The source markets in which the respective destination was surveyed as part of the Destination Brand 23 study are marked in green.

Presentation of selected key results
"Relevance + interest in digital tourism
offerings (AR + VR)"
from all 10 Destination Brand source markets

General interest in “Augmented Reality”

Question:

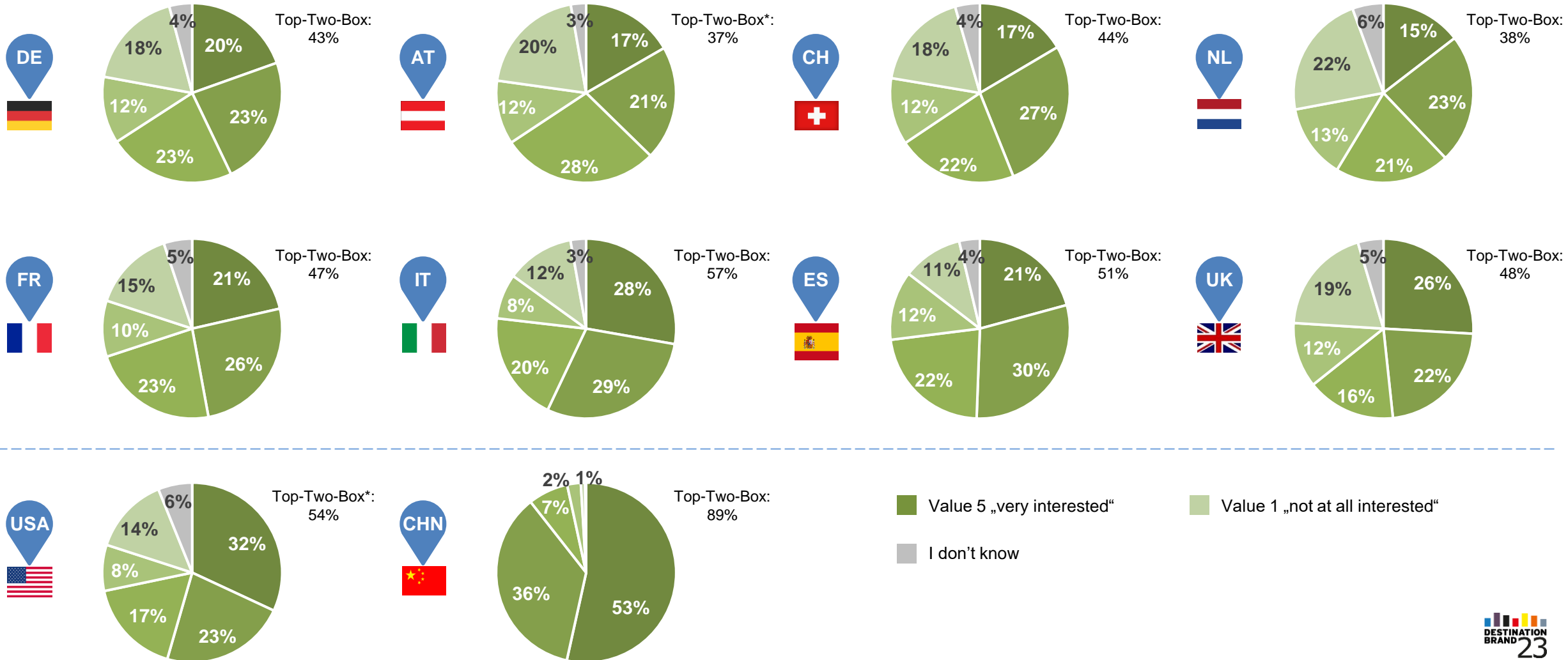
Please imagine you are on holiday:

How interested are you in general (i.e., regardless of a specific tourist destination) in enhancing your on-site holiday experiences by additional digital elements, such as images, information / texts, animations (accessible in real time via smartphones, tablets or similar devices)?

Please apply the scale from 1 = “not at all interested” to 5 = “very interested”



General interest in “Augmented Reality”



Source: inspektour (international) GmbH, 2023

Base: all respondents in the respective source markets (n = min. 1,000)
 Top-two-box on a scale from “5 = very interested” to “1 = not at all interested”; in % of respondents
 * Possible deviations of 1% from the sum of the individual values are due to rounding

General interest in “Virtual Reality”

Question:

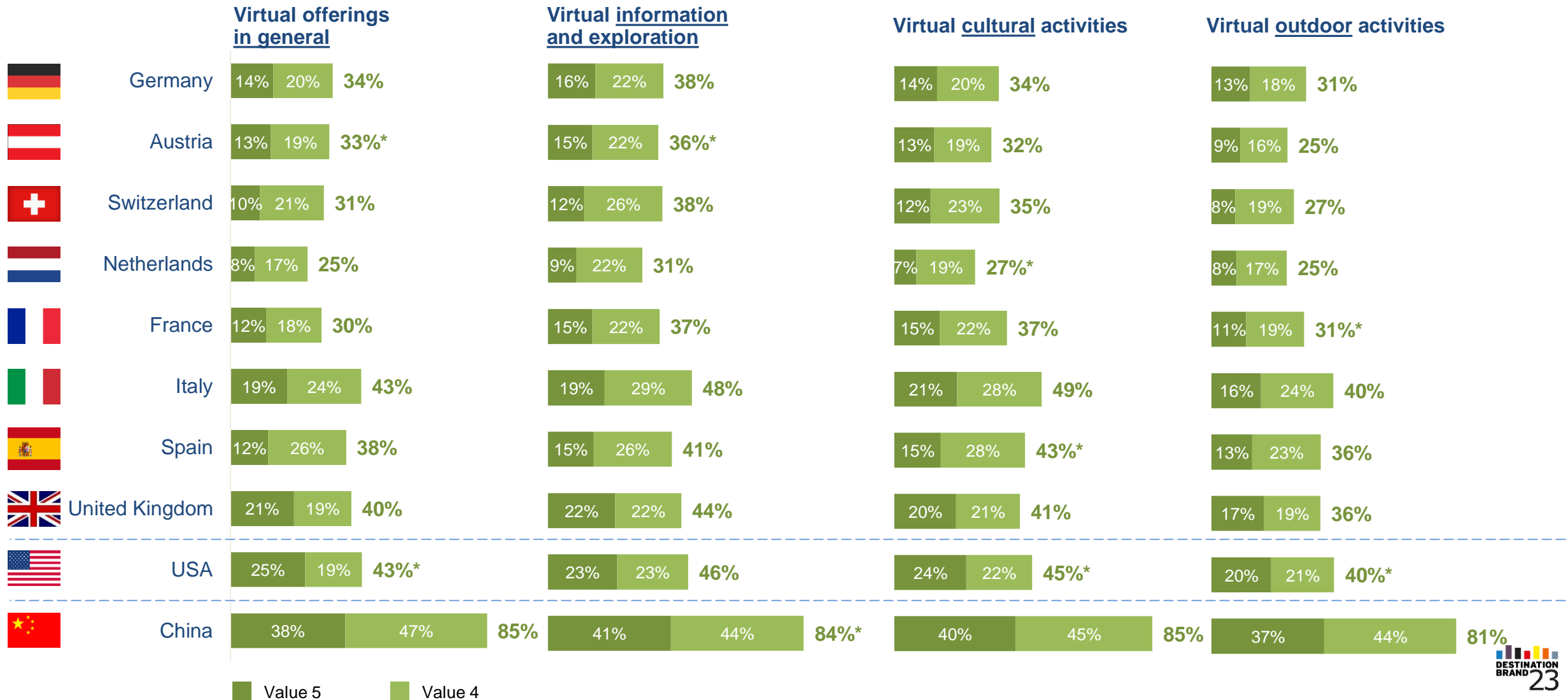
With the help of modern technologies (e.g., virtual reality (VR) glasses), you can immerse yourself in a completely virtual world and find out about possible tourist destinations, be inspired, explore or even visit them without necessarily being on site.

**Now please imagine that you are sitting for example on the sofa at home:
How interested are you in general (i.e., regardless of a specific tourist destination) in the following completely virtual activities?**

*Please apply the scale from
1 = “not at all interested” to 5 = “very interested”*



General interest in “Virtual Reality”



Base: all respondents in the respective source markets (n = min. 1,000)
 Top-two-box on a scale from “5 = very interested” to “1 = not at all interested”; in % of respondents
 * Possible deviations of 1% from the sum of the individual values are due to rounding

Source: inspektour (international) GmbH, 2023

General relevance for destination selection

Question (short form):

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

Please apply the scale from 1 = “not at all relevant” to 5 = “very relevant”.

You can grade your opinion with the numerical values in between.

Ranking of the considered offers and infrastructure elements with regard to the general relevance for destination selection (mean = 49%)					
Rank		% of respondents	Rank	% of respondents	
1	The tourist destination as a whole (overall impression)	76%	20	Digital information and services	46%
2	Value for money	75%	21	Art and cultural offerings	44%
3	Scenery / nature	74%	22	Tourism office / tourism services / tourist information	44%
4	Arrival options / accessibility	72%	23	Spa facilities with offerings for wellness, personal care, fitness and preventive health treatments	42%
5	Accommodation offers	71%	24	Cycling facilities	42%
6	Culinary offerings	69%	25	Wellness and beauty offerings	42%
7	Internet access	64%	26	Climate friendliness / CO2 neutrality of the tourist offerings	41%
8	Local recreation facilities / possibilities for day trips	63%	27	Events	41%
9	Service and customer orientation	61%	28	Health and spa services	40%
10	Town and city scape(s) / town centre / architecture	60%	29	Wildlife parks / zoos	40%
11	Regionality / authenticity of tourist offerings	60%	30	Harbours / marinas	40%
12	Beach / bathing facilities	59%	31	Barrier-free accessibility of the tourist offerings	37%
13	(Spa) gardens / parks / green spaces	55%	32	Water sports facilities	34%
14	Hiking facilities	52%	33	Campsites / caravan and motorhome sites	31%
15	Castles, palaces, mansions	51%	34	Offer to experience Japanese culture / gastronomy	30%
16	Shopping facilities	49%	35	Winter sports facilities	29%
17	Local mobility services	47%	36	Possibilities for workcations	28%
18	Swimming pools / adventure pools / thermal baths	47%	37	Offer of automobile museums	28%
19	Sustainability of tourist offerings	46%			

Base: all respondents in the source market Germany (n = 15,000)

Source: inspektour (international) GmbH, 2023

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

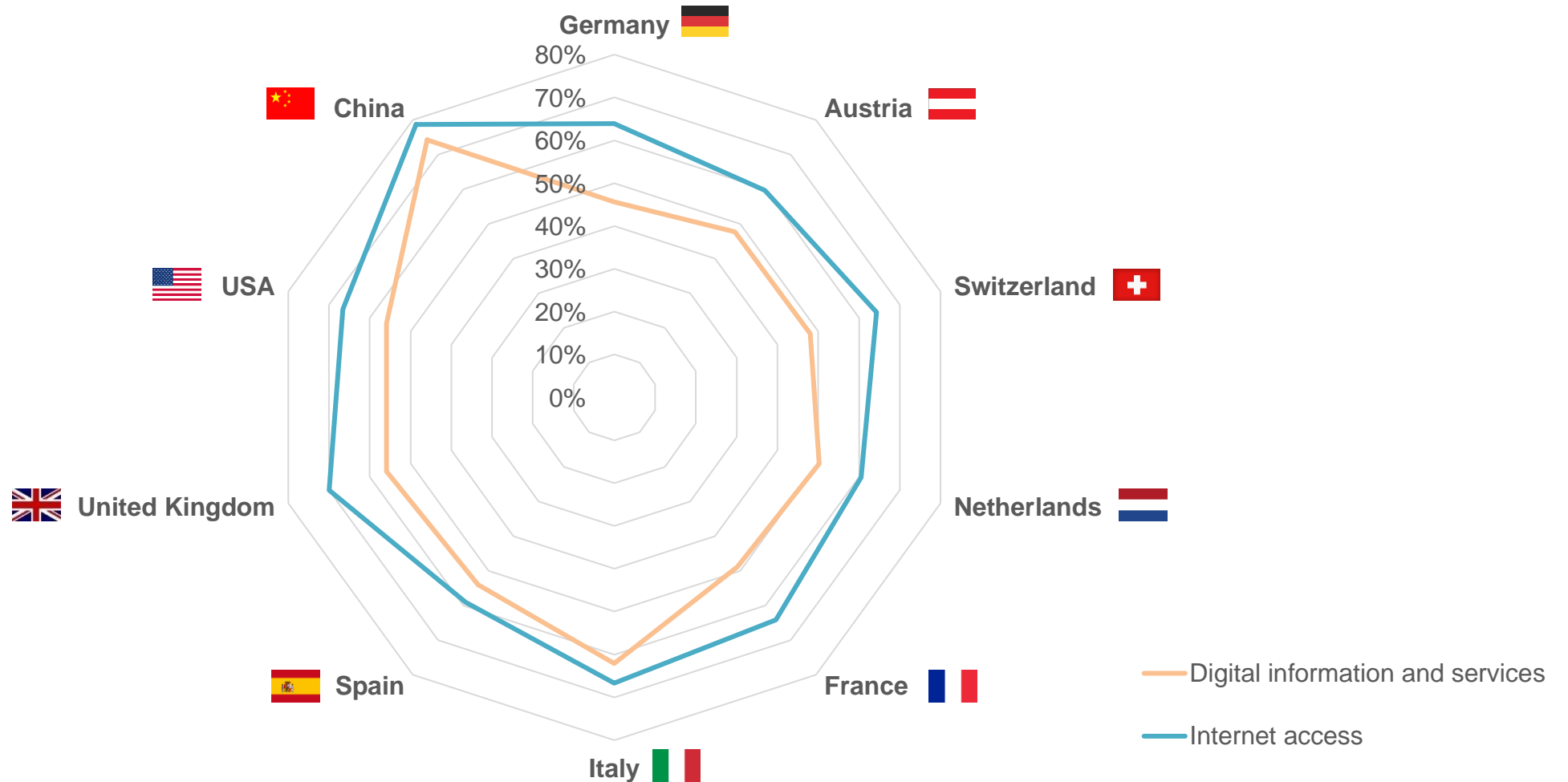
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Top-two-box on a scale from "5 = very relevant" to "1 = not at all relevant"; in % of respondents

General relevance for destination selection – all 10 DB source markets



Source: inspektour (international) GmbH, 2023

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

Digital user types

Question (short form):

Which of the following descriptions of digital user types is most likely to apply to you?

First of all, please get a brief overview of the different descriptions.

Then decide on the most applicable description. You can only select one of the six descriptions

Digital User Type 1

- Level of competence: very low
- Views: have little or no interest in digitisation | the digital world doesn't seem to offer them any added value | have come to terms with the situation
- Behaviours: are offline | rarely have a need for digital exchange

Digital User Type 2

- Level of competence: low | are proficient at most in simple digital skills such as search engine use
- Views: don't deal with digital possibilities (anymore) | have no opinion on many aspects of the digital world
- Behaviours: make selective use of practical everyday applications | as a means to an end and no more than necessary

Digital User Type 3

- Level of competence: intermediate | basic skills are mastered confidently | only reach their limits when it comes to more complex digital skills
- Views: have a deeply sceptical attitude | the majority suspect that digitisation will have a rather negative impact on society | do not see much benefit for themselves personally
- Behaviours: digital applications are part of everyday life

Digital User Type 4

- Level of competence: intermediate | have a far above-average competence for digital applications with low complexity | only lose touch with more complex skills
- Views: have a positive attitude towards digitisation | positive aspects are perceived much more strongly than possible disadvantages
- Behaviours: like to participate in digital life | know how to make their lives easier with the help of digital applications

Digital User Type 5

- Level of competence: high | have (strongly) above-average digital skills
- Views: have an ambivalent attitude towards digitisation | see the opportunities of the digital world to an above-average extent | scepticism is just as strong | feel great societal pressure to keep up
- Behaviours: are constantly online | are equipped with many digital devices

Digital User Type 6

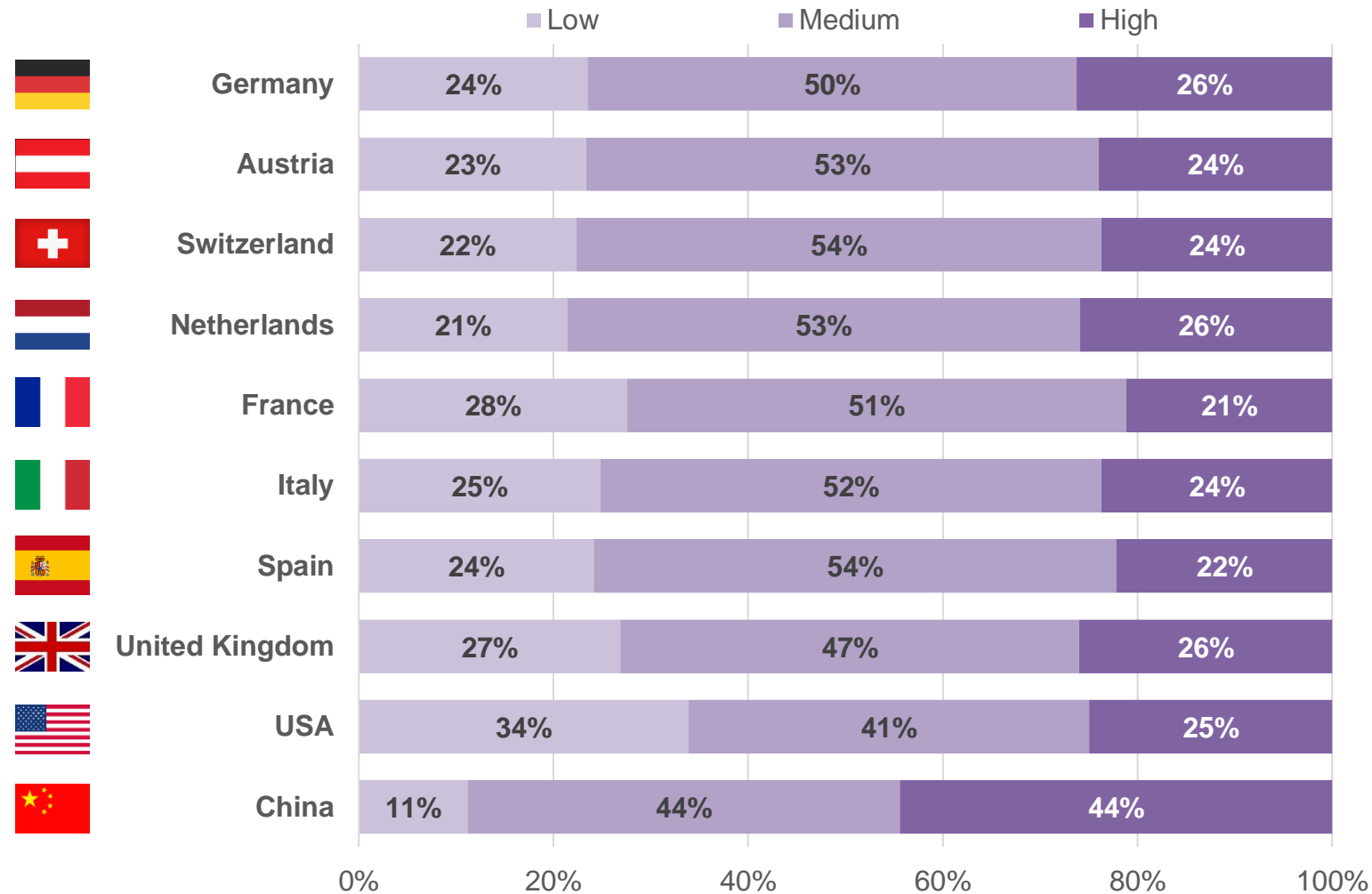
- Level of competence: high | in addition to complex digital skills, they are proficient in job-specific applications
- Views: see digitisation primarily as an opportunity for society and for themselves
- Behaviours: are characterised by a broad and intensive digital usage behaviour | are happy to educate themselves on digital topics

Low digital utilisation

Medium digital utilisation

High digital utilisation

Level of digital utilisation – all 10 DB source markets



Source: inspektour (international) GmbH, 2023

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

Source market comparison (all 10 source markets)

Top 5-Ranking (Top of mind)

Question (short form):

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

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

TOP 5 ranking of “opportunity to experience digitally” international destinations – all DB source markets

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

Source market Germany:
Assessment of the
“Digital information and services”
about the tourist destinations

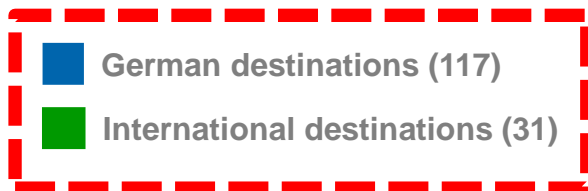
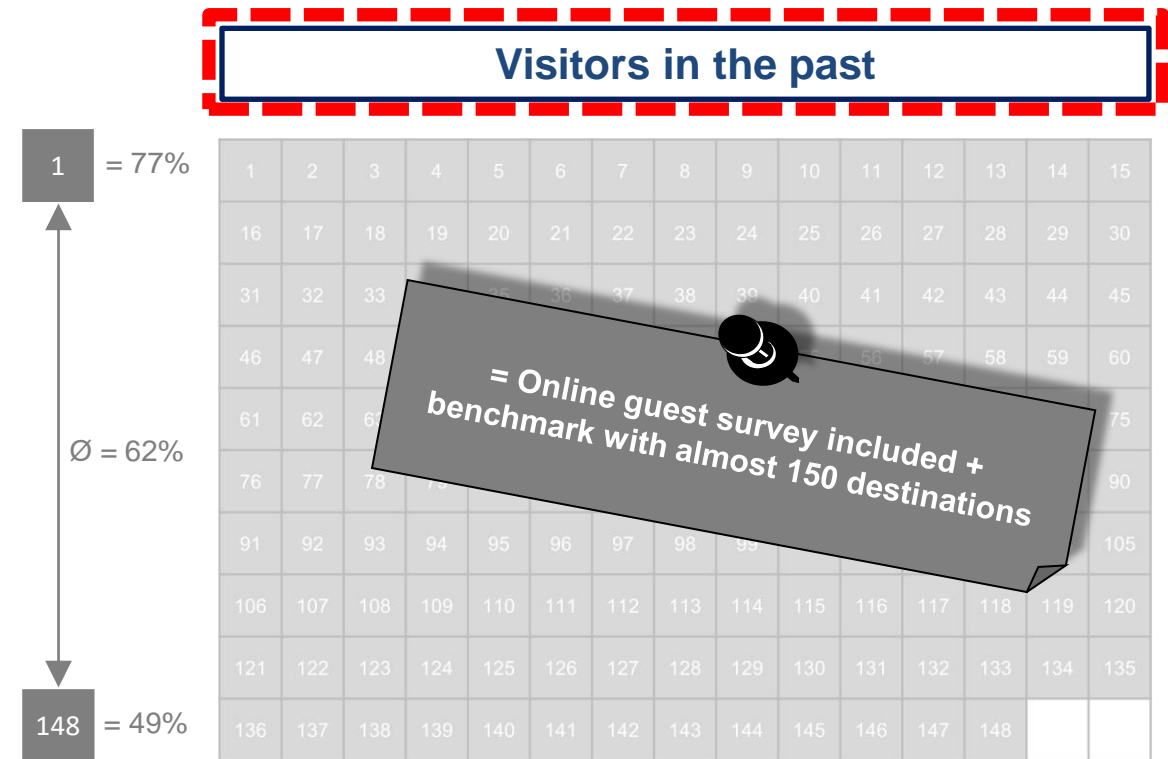
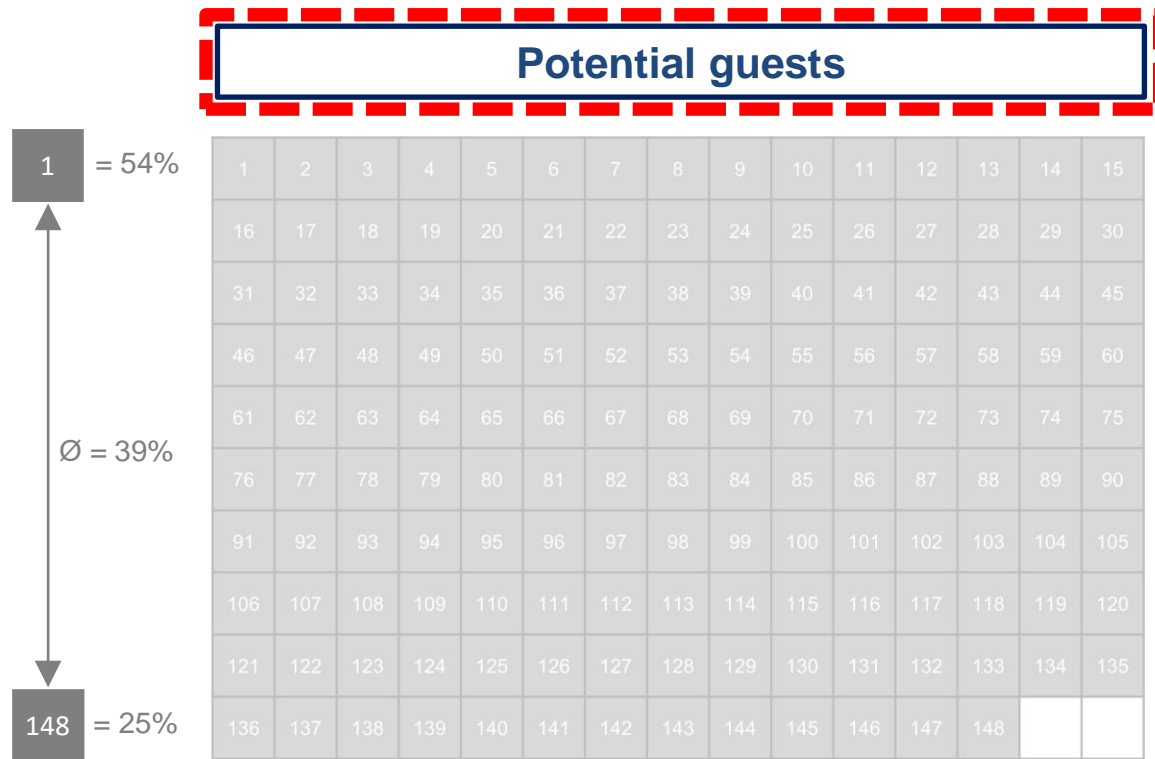
Question (short form):

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

Please use the scale from 1 = “very bad” to 5 = “very good”

Comparison of the assessment of destination categories for “Digital information and services”

Comparison of subgroups “Potential guests” vs. “Visitors in the past”



Source: inspektour (international) GmbH, 2023

Basis: Potential guests (n on average = 297) and Visitors in the past (n on average = 197) in SM Germany
Ranking based on the top-two-box on a scale from “5 = very good” to “1 = very bad”

Comparison of the assessment of destination categories for “Digital information and services”

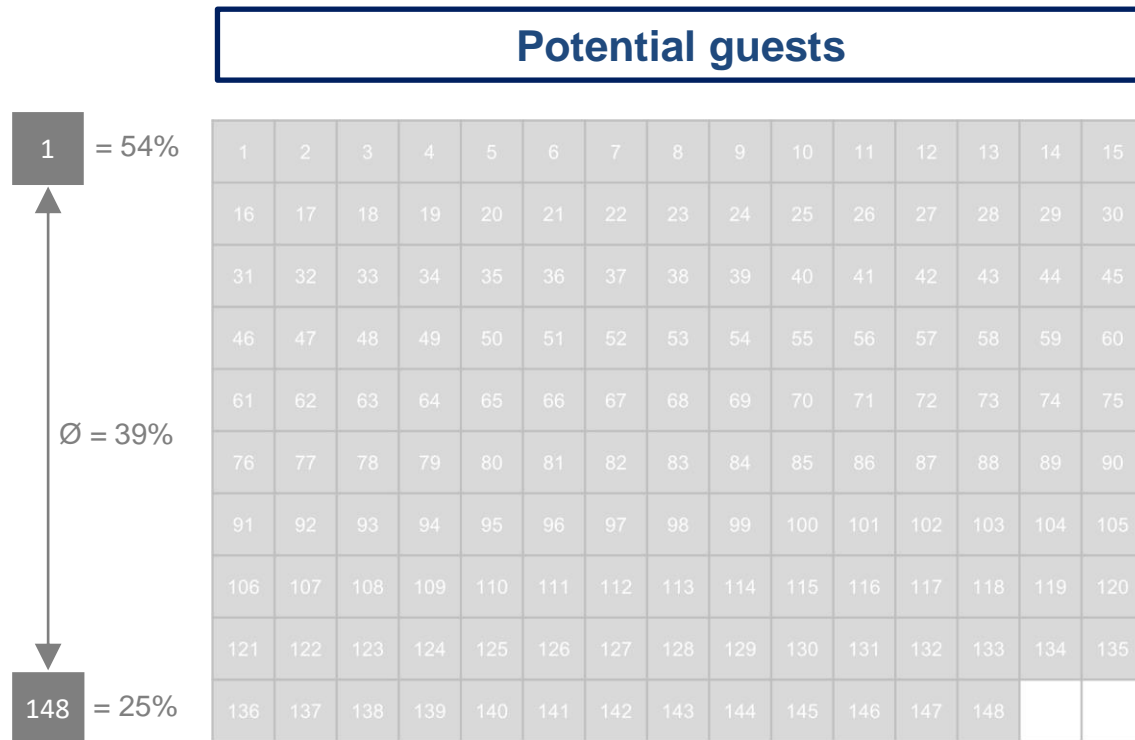
Comparison of subgroups “Potential guests” vs. “Visitors in the past”



- German destinations (117)
- International destinations (31)

Comparison of the assessment of destination categories for “Digital information and services”

Comparison of subgroups “Potential guests” vs. “Visitors in the past”



Source: inspektour (international) GmbH, 2023

Basis: Potential guests (n on average = 297) and Visitors in the past (n on average = 197) in SM Germany
Ranking based on the top-two-box on a scale from “5 = very good” to “1 = very bad”

Comparison of the assessment of destination categories for “Digital information and services”

Comparison of subgroups “Potential guests” vs. “Visitors in the past”



- Regions (82)
- Municipalities and cities (56)
- Countries (10)

Source: inspektour (international) GmbH, 2023

Basis: Potential guests (n on average = 297) and Visitors in the past (n on average = 197) in SM Germany
Ranking based on the top-two-box on a scale from “5 = very good” to “1 = very bad”

More Destination Brand 23 webinars

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

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

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

„The image of BeNeLux destinations as tourism and living space in the source markets CH, DE, FR and NL“

Language: English

[Registration](#)

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

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

Language: English

[Registration](#)

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

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

Language: German

[Registration](#)

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

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

Language: German

[Registration](#)

Thank you very much for your attention!

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