in cooperation with:

FH Westküste
University of Applied Sciences

inspektour
TOURISM AND MARKET RESEARCH

DESTINATION BRAND 19

THE SPONTANEOUS ASSOCIATIONS TO TOURIST DESTINATIONS

SOURCE MARKET **GERMANY**

Report for the tourist destination Latvia

Customer-oriented study of the spontaneous associations to tourist destinations

total 4,000 respondents I population representative study | 45 individual destinations

Publisher and project leadership:	*inspektour (international) GmbH, Hamburg* *Concepts | Studies Management | Monitoring* *Market Research | Destination Brand Trainings | Coaching*
Publisher and scientific advisory board:	*Institute for Management and Tourism (IMT)* *of the FH Westküste (University of Applied Sciences)* *Leading University Institute in Tourism in Germany*
Data collection:	*Ipsos Operations GmbH, Mölln*

Legal notice:

Outline

Outline

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1. Management Summary

Brief description of the analysis of spontaneous associations

This report contains a detailed evaluation of **the study "Destination Brand 19 – the spontaneous associations to tourist destinations"** for the destination Latvia in the source market Germany. The management summary provides a brief overview of the study and summarises the key results of the comprehensive report for Latvia.

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 Institute for Management and Tourism (IMT) of the FH Westküste (University of Applied Sciences) operates as the co-publisher and scientific advisory board of the study. The database of the well-established study is assembled in cooperation with the market research company Ipsos.

Scientifically-founded insights into the own association profile are of crucial importance for tourist destinations in order to achieve a successful target-oriented strategic development of the destination marketing. In order to determine the association profile of Latvia in the source market Germany as part of the population representative survey of the study Destination Brand 19, the respondents were asked the question *"What springs spontaneously to your mind when thinking of the foreign tourist destination Latvia?"*. Among the 1,000 respondents to Latvia those were asked to state their spontaneous associations who know the tourist destination Latvia (when it is provided as an answer option) – even if only by name. In analogy to the entire Destination Brand study series, the percentage values of the spontaneous associations in this report for Latvia are based on the total number of respondents (n = 1,000). The queried designation of Latvia for the German respondents was "Lettland".

For answering this **open-ended question** (i.e. there were no predetermined answers), the respondents had the opportunity to write down everything they could think of without any limits in terms of content. This procedure intentionally resulted in a wide-ranged association profile with many different aspects.

As a first step of the analysis, inspektour comprehensively examined the total of 1,739 individual associations as regards content and divided them into association sub categories each comprising at least five individual responses. In order to further clarify the overall content-related structure of the association profile of the tourist destination Latvia, the sub categories belonging together were additionally grouped together in a second step into 14 superior categories (each containing at least 20 individual responses).

Basis of the analysis: Open-ended question without any limits in terms of content

Total amount of individual associations:

1,739

1. Management Summary

Frequency distribution of the association superior categories

The top 4 association superior categories (see chapter 2.2) for Latvia as a tourist destination (in % of respondents) are comprised of the categories “landscape / nature in general” (16.7%), “general geographical location” (16.3%), “general positive assessment / well-being” (13.6%) and “weather / climate in general” (12.2%).

The other superior categories “beach / coast / water” (9.9%), “places, cities and regions in and around Latvia incl. attributes” (8.9%), “sights / attractions / events” (8.4%), “policy related associations to Latvia” (6.7%), “tradition & customs / regionality / culinary in general” (5.7%), “holiday in general / holiday and leisure activities” (3.9%), “negative associations to Latvia” (3.7%), “economic development & (digital) infrastructure” (2.6%), “general country-related associations” (2.4%) as well as “distance / accessibility / personal relation” (2.2%) achieve (significantly) lower proportions in the spontaneous association query about Latvia as a tourist destination. Furthermore, in 0.7% of cases responses were given that could not be assigned to any category.

Moreover, 60.0% of the respondents were not capable of submitting substantive associations to Latvia as a tourist destination (see group “unknown / only know by name – nothing / don’t know – no idea / can't think of anything – never been there before – invalid answer”).

Top superior category
“landscape / nature in general”
16.7%

Top association sub categories of the 4 largest superior categories

By taking a detailed look at the superior categories formed, more in-depth information about the corresponding associations can be obtained (see chapters 2.3 + 5).

Regarding the superior category 1 “landscape / nature in general“ (16.7%), the association “(beautiful, great, diverse) landscape (surroundings, area) / (beautiful, much, pure) nature” (6.2%) stands in the foreground. In the case of superior category 2 “general geographical location” (16.3%), the focus lies on the association “(belongs to the) Baltic States / Baltic / Estonia / Lithuania” (7.1%), while in the course of superior category 3 “general positive assessment / well-being” (13.6%) most responses relate to “general positive evaluation (e.g. (very) beautiful, cool, interesting, great, pretty, super, wonderful)” (3.9%) and “(nice, friendly, cordial) people / hospitable / friendliness / open-minded / sympathetic / warm-hearted / cosmopolitan” (3.4%). In addition, the superior category 4 “weather / climate in general” (12.2%) is clearly headed by “cold / coldness / ice / frost” (9.8%).

1. Management Summary

Overall top 10 association sub categories

Moreover, the top 10 spontaneous associations (see chapter 2.4) will be closely examined without taking into account the superior categorisation carried out (in % of respondents). Here, all of the top associations of the four strongest superior categories can be found.

The top associations to Latvia as a tourist destination are led by the sub category “cold / coldness / ice / frost” (9.8%, belonging to superior category 4). It is followed by “(located at the) Baltic Sea (coast) / (at the) sea / (at, much) water” (8.2%, belonging to superior category 5) and “(belongs to the) Baltic States / Baltic / Estonia / Lithuania” (belonging to superior category 2) as well as “(capital) Riga” (each 7.1%, belonging to superior category 6).

The remaining ranks of the top 10 association sub categories are in a range of 2.5-6.2% of the respondents. These include the following spontaneous associations: “(beautiful, great, diverse) landscape (surroundings, area) / (beautiful, much, pure) nature” (6.2%, rank 5), “general positive evaluation (e.g. (very) beautiful, cool, interesting, great, pretty, super, wonderful)” (3.9%, rank 6), “former Soviet Union / former UDSSR / former Eastern Block / Russian influenced / Soviet influenced” (3.5%, rank 7), “(nice, friendly, cordial) people / hospitable / friendliness / open-minded / sympathetic / warm-hearted / cosmopolitan” (3.4%, rank 8), “reindeer / moose” (3.3%, rank 9) as well as “(close to, borders) Russia / (many) Russians” (2.5%, rank 10).

In total, the top 10 association sub categories to Latvia as a tourist destination reach a share value of 55.0% of the respondents.

Top sub category
“cold / coldness / ice / frost”
9.8%

Overall top 20 association sub categories differentiated by sub- and target groups

In addition, this report contains in-depth analyses of the top 20 association sub categories according to the sub-groups “brand connoisseurs”, “visitors in the past” and “respondents with a distinct intention to travel abroad” (see chapter 2.5) as well as the following additional target group segmentations (see chapter 6):

- the individually selected target groups chosen by the Investment and Development Agency of Latvia “Interested in city breaks”, “Interested in nature”, “Interested in culture”, “Interested in culinary”, “Interested in nature and cycling” and “Interested in relaxing” (see “standard target group analysis”)
- the “9+1 types of holiday makers” based on the general interest in holiday themes of the Germans

These evaluations provide additional valuable information on sub-group and target group-specific characteristics of the association profile of Latvia as a tourist destination.

Detection of sub-group and target group-specific features through additional analyses

Outline

2.1 Brief overview of methodology

Aim	– Study about the **spontaneous associations** to tourist destinations in the source markets Germany (DE), Austria (AT), Switzerland (CH), the Netherlands (NL) and China (CN)

Key issues	– **Spontaneous associations** per destination classified in sub- and superior categories
	– **Target group analysis** among others differentiated by:
	  – sociodemographic criteria and the general interest in several holiday activities,
	  – the "9+1 types of holiday makers"* as well as
	  – the "Sinus milieus Germany"* and the "Sinus-meta-milieus"*
	* These options for target group definition exist exclusively for the source market Germany.

Survey design	– **55 destinations** (several destinations were surveyed in more than one source market; distribution among source markets: DE = 45 | AT = 8 | CH = 12 | NL = 8 | CN = 10) – **Total sample size:** 8,000; per destination: 1,000 (spontaneous associations) (distribution among source markets: DE = 4,000 | all other source markets each n = 1,000) – **Online survey in the respective national language** (remark: CH = German & French); **quota sample** based on cross quota age/sex and regional origin – **Representative** for the respective population aged 14-74 years living in private households (deviation only in the source market China**) ** The survey covers the Chinese-speaking urban population (including the top city categories "Tier 1-3") aged 14-59 years with Internet access, which according to additional preceding filter questions shows an affinity to travel abroad.
Survey period	– **November / December 2019**

2.2 Overview of the association superior categories

Overview of the association superior categories

*> What springs spontaneously to your mind when thinking of the foreign tourist destination **Latvia**?*

■ ***Latvia***
Source market: Germany
Base: All respondents
Number of respondents: 1,000
Superior categories – part 1 of 2

	Association superior categories	% of respondents	% of responses	Number of individual responses
1	landscape / nature in general	16.7%	9.6%	167
2	general geographical location	16.3%	9.4%	163
3	general positive assessment / well-being	13.6%	7.8%	136
4	weather / climate in general	12.2%	7.0%	122
5	beach / coast / water	9.9%	5.7%	99
6	places, cities and regions in and around Latvia incl. attributes	8.9%	5.1%	89
7	sights / attractions / events	8.4%	4.8%	84
8	policy related associations to Latvia	6.7%	3.9%	67

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

2.2 Overview of the association superior categories

Overview of the association superior categories

> *What springs spontaneously to your mind when thinking of the foreign tourist destination **Latvia**?*

■ ***Latvia***
Source market: Germany
Base: All respondents
Number of respondents: 1,000
Superior categories – part 2 of 2

	DESTINATION BRAND 19 Association superior categories	% of respondents	% of responses	Number of individual responses
9	tradition & customs / regionality / culinary in general	5.7%	3.3%	57
10	holiday in general / holiday and leisure activities	3.9%	2.2%	39
11	negative associations to Latvia	3.7%	2.1%	37
12	economic development & (digital) infrastructure	2.6%	1.5%	26
13	general country-related associations	2.4%	1.4%	24
14	distance / accessibility / personal relation	2.2%	1.3%	22
	further associations to Latvia without category allocation	0.7%	0.4%	7
	no substantive associations (unknown / only know by name – nothing / don't know – no idea / can't think of anything – never been there before – invalid answer)	60.0%	34.5%	600
	sum of individual responses encompassing all categories	**173.9%***	**100.0%***	**1,739***

* Due to the multiple response option, the sum of the individual responses (1,739) is higher than the total number of respondents (1,000).

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

2.3 Top 3 association sub categories of the 4 largest superior categories

Cat. 1: landscape / nature in general (16.7% of respondents)

- (beautiful, great, diverse) landscape (surroundings, area) / (beautiful, much, pure) nature (6.2%)
- reindeer / moose (3.3%)
- (much, beautiful) forest(s) / (green) meadows / (much) green / (many) green spaces (2.4%)

Cat. 2: general geographical location (16.3% of respondents)

- (belongs to the) Baltic States / Baltic / Estonia / Lithuania (7.1%)
- (close to, borders) Russia / (many) Russians (2.5%)
- (located in the) North / northern / Nordic (1.9%)

Latvia
Source market: Germany
Base: all respondents

Cat. 3: general positive assessment / well-being (13.6% of respondents)

- general positive evaluation (e.g. (very) beautiful, cool, interesting, great, pretty, super, wonderful) (3.9%)
- (nice, friendly, cordial) people / hospitable / friendliness / open-minded / sympathetic / warm-hearted / cosmopolitan (3.4%)
- different / extraordinary / exotic / fascinating / mysterious / inspiration / exciting / many new things (1.8%)

Cat. 4: weather / climate in general (12.2% of respondents)

- cold / coldness / ice / frost (9.8%)
- (much) snow (2.1%)

DESTINATION BRAND 19

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

2.4 Overall top 20 association sub categories

Overall top 20 association sub categories

> *What springs spontaneously to your mind when thinking of the foreign tourist destination* ***Latvia****?*

Latvia
Source market: Germany
Base: All respondents
Number of respondents: 1,000
Top 20 sub categories – part 1 of 2

	Overall top 20 association sub categories	% of respondents	% of responses	Number of individual responses
1	cold / coldness / ice / frost	9.8%	5.6%	98
2	(located at the) Baltic Sea (coast) / (at the) sea / (at, much) water	8.2%	4.7%	82
3	(belongs to the) Baltic States / Baltic / Estonia / Lithuania	7.1%	4.1%	71
3	(capital) Riga	7.1%	4.1%	71
5	(beautiful, great, diverse) landscape (surroundings, area) / (beautiful, much, pure) nature	6.2%	3.6%	62
6	general positive evaluation (e.g. (very) beautiful, cool, interesting, great, pretty, super, wonderful)	3.9%	2.2%	39
7	former Soviet Union / former UDSSR / former Eastern Block / Russian influenced / Soviet influenced	3.5%	2.0%	35
8	(nice, friendly, cordial) people / hospitable / friendliness / open-minded / sympathetic / warm-hearted / cosmopolitan	3.4%	2.0%	34
9	reindeer / moose	3.3%	1.9%	33
10	(close to, borders) Russia / (many) Russians	2.5%	1.4%	25

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

2.4 Overall top 20 association sub categories

Overall top 20 association sub categories

> What springs spontaneously to your mind when thinking of the foreign tourist destination ***Latvia****?*

■ ***Latvia***
Source market: Germany
Base: All respondents
Number of respondents: 1,000
Top 20 sub categories – part 2 of 2

	Overall top 20 association sub categories	% of respondents	% of responses	Number of individual responses
11	(much, beautiful) forest(s) / (green) meadows / (much) green / (many) green spaces	2.4%	1.4%	24
11	(much, great) culture / cultural interesting / cultural heritage	2.4%	1.4%	24
13	(much) snow	2.1%	1.2%	21
14	(located in the) North / northern / nordic	1.9%	1.1%	19
14	wide / wide plain / flat (country) / even	1.9%	1.1%	19
16	(located in the) East	1.8%	1.0%	18
16	culinary in general, e.g. (good, other, tasty) food, beer, cheese, gastronomy, salted fish, vodka	1.8%	1.0%	18
16	different / extraordinary / exotic / fascinating / mysterious / inspiration / exciting / many new things	1.8%	1.0%	18
16	far away / difficult to reach	1.8%	1.0%	18
20	small country / small	1.7%	1.0%	17

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

2.4 Overall top 20 association sub categories – *word cloud (base: all respondents)*

Note: The illustration is based on the quantitative distribution of the top 20 association sub categories to the tourist destination Latvia in the source market Germany, i.e. the larger the respective sub category is presented, the more frequently – but not linearly – it is associated with the destination Latvia.

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

2.5 Overall top 20 association sub categories – *by sub-groups*

Overall top 20 association sub categories – *by sub-groups*

*> What springs spontaneously to your mind when thinking of the foreign tourist destination **Latvia**?*
> in % of respondents

■ ***Latvia***
Source market: Germany
Base: All respondents by sub-groups
Number of respondents: 1,000
Top 20 sub categories – part 1 of 2

	DESTINATION BRAND 19 **Overall top 20 association sub categories – *by sub-groups*** *> in % of respondents*	All respondents	Brand connoisseurs	Visitors in the past*	Distinct intention to travel abroad
1	cold / coldness / ice / frost	**9.8%**	15.4%	10.9%	13.1%
2	(located at the) Baltic Sea (coast) / (at the) sea / (at, much) water	**8.2%**	12.9%	12.7%	9.5%
3	(belongs to the) Baltic States / Baltic / Estonia / Lithuania	**7.1%**	11.2%	3.6%	11.2%
3	(capital) Riga	**7.1%**	11.2%	23.6%	9.1%
5	(beautiful, great, diverse) landscape (surroundings, area) / (beautiful, much, pure) nature	**6.2%**	9.8%	3.6%	7.9%
6	general positive evaluation (e.g. (very) beautiful, cool, interesting, great, pretty, super, wonderful)	**3.9%**	6.1%	10.9%	4.8%
7	former Soviet Union / former UDSSR / former Eastern Block / Russian influenced / Soviet influenced	**3.5%**	5.5%	5.5%	4.8%
8	(nice, friendly, cordial) people / hospitable / friendliness / open-minded / sympathetic / warm-hearted / cosmopolitan	**3.4%**	5.4%	18.2%	3.9%
9	reindeer / moose	**3.3%**	5.2%	0.0%	3.9%
10	(close to, borders) Russia / (many) Russians	**2.5%**	3.9%	7.3%	2.5%

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

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

2.5 Overall top 20 association sub categories – *by sub-groups*

Overall top 20 association sub categories – *by sub-groups*

*> What springs spontaneously to your mind when thinking of the foreign tourist destination **Latvia**?*
> in % of respondents

■ ***Latvia***
Source market: Germany
Base: All respondents by sub-groups
Number of respondents: 1,000
Top 20 sub categories – part 2 of 2

	Overall top 20 association sub categories – *by sub-groups* *> in % of respondents*	**All respondents**	**Brand connoisseurs**	**Visitors in the past***	**Distinct intention to travel abroad**
11	(much, beautiful) forest(s) / (green) meadows / (much) green / (many) green spaces	**2.4%**	3.8%	3.6%	3.1%
11	(much, great) culture / cultural interesting / cultural heritage	**2.4%**	3.8%	3.6%	2.9%
13	(much) snow	**2.1%**	3.3%	0.0%	2.1%
14	(located in the) North / northern / nordic	**1.9%**	3.0%	5.5%	2.3%
14	wide / wide plain / flat (country) / even	**1.9%**	3.0%	0.0%	1.7%
16	(located in the) East	**1.8%**	2.8%	0.0%	3.1%
16	culinary in general, e.g. (good, other, tasty) food, beer, cheese, gastronomy, salted fish, vodka	**1.8%**	2.8%	10.9%	1.9%
16	different / extraordinary / exotic / fascinating / mysterious / inspiration / exciting / many new things	**1.8%**	2.8%	9.1%	2.5%
16	far away / difficult to reach	**1.8%**	2.8%	0.0%	1.5%
20	small country / small	**1.7%**	2.7%	1.8%	2.3%

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

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

Outline

3.1 General overview of the study series Destination Brand

The following overview is an excerpt from a detailed, scientifically founded presentation of the Destination Brand study series by the authors Prof. Dr. Bernd Eisenstein, Alexander Koch, Dr. Petra Trimborn and Sylvia Müller. It appeared in the edited volumes on market research for destinations published by Prof. Dr. Bernd Eisenstein in 2017 (for more information see chapter 8.5 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 had an exclusive focus on the perception of tourist destination brands from the perspective of the demand.

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

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

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

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

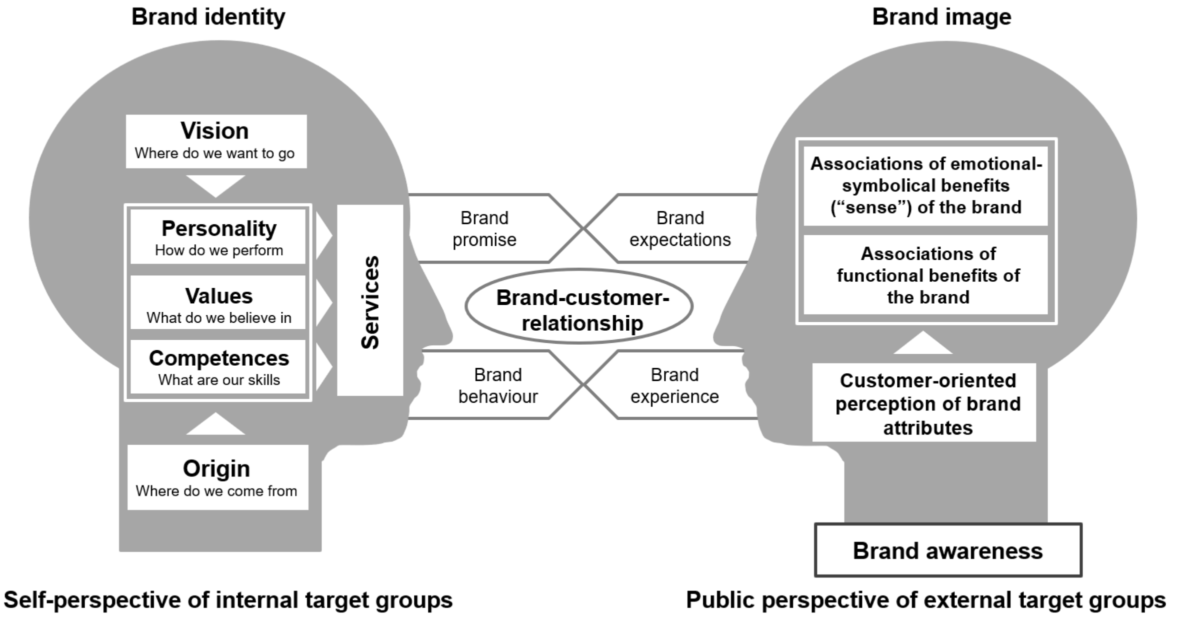
Theoretical starting point: concept of identity-based brand management

1st study: Brand awareness | four dimensional brand funnel

3.1 General overview of the study series Destination Brand

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

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



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.

3.1 General overview of the study series Destination Brand

	Brand value	Theme competence	Profile / Image
Aim	– Customer-oriented evaluation of the **brand value** of tourist destinations	– Customer-oriented evaluation of the **theme competence** of tourist destinations (≙ associations of the **functional benefits** of the destination brands)	– Customer-oriented evaluation of the **profiles / images** of tourist destinations (≙ associations of the **emotional-symbolic benefits** of the destination brands)
Research focus	Four dimensional brand funnel analysis: – Awareness (supported and unsupported) – Likeability – Willingness to visit: Potential of future short trips and longer holiday trips – Visits in the past – DB15: Willingness to recommend – Target group- and competitor analysis	– General interest in holiday activities and their relevance as a travel motive (both regardless of a specific destination) – Supported theme suitability per destination (for 5 general themes and 5 specific themes) – Theme suitability top of mind per destination – Target group- and competitor analysis	**Module 1 (M1):** – General relevance of destination attributes and characteristics for the destination selection (regardless of a specific destination) – Supported evaluation of characteristics per destination (for 8 general attributes and 5 specific attributes) – Target group- and competitor analysis **Module 2 (M2):** – Spontaneous associations per destination

Survey design

For all sub-studies

- **Online survey** in respective national language; quota sample (based on cross quota age/sex and regional origin).
- **Representative** for 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	DESTINATION BRAND 09	DESTINATION BRAND 12	DESTINATION BRAND 15	DESTINATION BRAND 18	DESTINATION BRAND 10	DESTINATION BRAND 13	DESTINATION BRAND 16	DESTINATION BRAND 18	DESTINATION BRAND 11	DESTINATION BRAND 14	DESTINATION BRAND 17	DESTINATION BRAND 19
– Source markets	DE	DE	DE	DE | AT | CH | NL	DE	DE	DE	DE | AT | CH | NL	DE	DE	DE	DE | AT | CH|NL|CN
– Total number of respondents	8,900	15,000	17,000	12,000	10,500	16,000	17,000	12,000	10,000	11,000	17,000	8,000
– Total number of destinations	141	160	172	76*	141	160	172	76*	M1: 104 M2: 22	M1: 115 M2: 21	M1: 170 M2: 170	55**
– Number of themes / characteristics	--	--	--	--	5 gen. + 25 specific	5 gen. + 50 specific	6 gen. + 57 specific	5 gen. + 28 specific	6 gen. + 50 specific	6 gen. + 56 specific	8 gen. + 59 specific	solely spontaneous associations

* In the study DB18 some destinations were surveyed in two or more source markets; distribution among source markets: DE = 45 | AT = 22 | CH = 33 | NL = 33.

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

3.2 Destination Brand Award

On the occasion of the fvw Destination Germany Day on the 14th of January 2020, inspektour presented the DESTINATION BRAND Award for the fourth time – this time concerning the current topic of **“digital experienceability”** of German tourist destinations.

Based on the question “Which holiday destinations (cities, regions, federal states, etc.) in Germany do you consider to be particularly well digitally experienceable?”, 4,000 Germans were surveyed in November and December 2019 as part of the study DESTINATION BRAND 19. In this course, the digital experience during all phases of the trip should be taken into account, including inspiration, information and booking before the trip – on-site experience – as well as follow-up and reflection after the trip.

The result of the open-ended question without answer specifications:

Of all the destinations mentioned, **Berlin** took the **first place** with 22% (stated in percentage of the respondents in each case) and thus received the award for particularly good digital experienceability.

Rank 2 and 3 were reached by the North German destinations **Hamburg** (15%) and the **Baltic Sea** (13%).

The study DESTINATION BRAND 17 already examined the **relevance of digital experienceability for the choice of destination** for a holiday with at least one overnight stay in general (i.e. independent of a specific destination). For 20% of the 17,000 respondents of the population representative survey in the German source market it has a high to very high relevance (= affinity for digital experienceability).

According to further analyses in the study DESTINATION BRAND 17, the affinities for digital experienceability also show among others an above-average affinity for the attributes **“modern”, “innovative” and “authentic / genuine”** as well as an above-average interest in holiday themes with a **distinct experience and edutainment character**.

The winners of this year's DESTINATION BRAND Award:

(1) Berlin, (2) Hamburg and (3) the Baltic Sea can be experienced particularly well digitally.

General relevance of the digital experienceability for the choice of destination

Potential for linking with destination characteristics and holiday themes

Outline

4.1 Methods of the profile study Destination Brand 19

As already described more in detail in chapter 3.1, **scientifically-founded insights** into the own association profile are of crucial importance for tourist destinations in order to achieve a successful target-oriented strategic development of the destination marketing. Against this background, the study Destination Brand 19 conducts a customer-oriented **measurement of spontaneous associations** to a multitude of tourist destinations based on population-representative online surveys.

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

While the predecessor profile studies in the years 2011, 2014 and 2017 already covered a comprehensive part of the German domestic tourist destinations regarding the supported evaluation of attributes and characteristics, the recent study has **widened the scope** and additionally encompasses the **four source markets Austria, Switzerland, the Netherlands and China**.

In order to determine the association profile of Latvia in the source market Germany as part of the population representative survey of the study Destination Brand 19, the respondents were asked the question *“What springs spontaneously to your mind when thinking of the foreign tourist destination Latvia?”*. Among the 1,000 respondents to Latvia those were asked to state their spontaneous associations who know the tourist destination Latvia (when it is provided as an answer option) – even if only by name. In analogy to the entire Destination Brand study series, the percentage values of the spontaneous associations in this report for Latvia are based on the total number of respondents (n = 1,000). The queried designation of Latvia for the German respondents was “Lettland”.

For answering this **open-ended question** (i.e. there were no predetermined answers), the respondents had the opportunity to write down everything they could think of without any limits in terms of content. This procedure intentionally resulted in a wide-ranged association profile with many different aspects.

As a first step of the analysis, inspektour comprehensively examined the total of 1,739 individual associations as regards content and divided them into association sub categories each comprising at least five individual responses. In order to further clarify the overall content-related structure of the association profile of the tourist destination Latvia, the sub categories belonging together were additionally grouped together in a second step into 14 superior categories (each containing at least 20 individual responses).

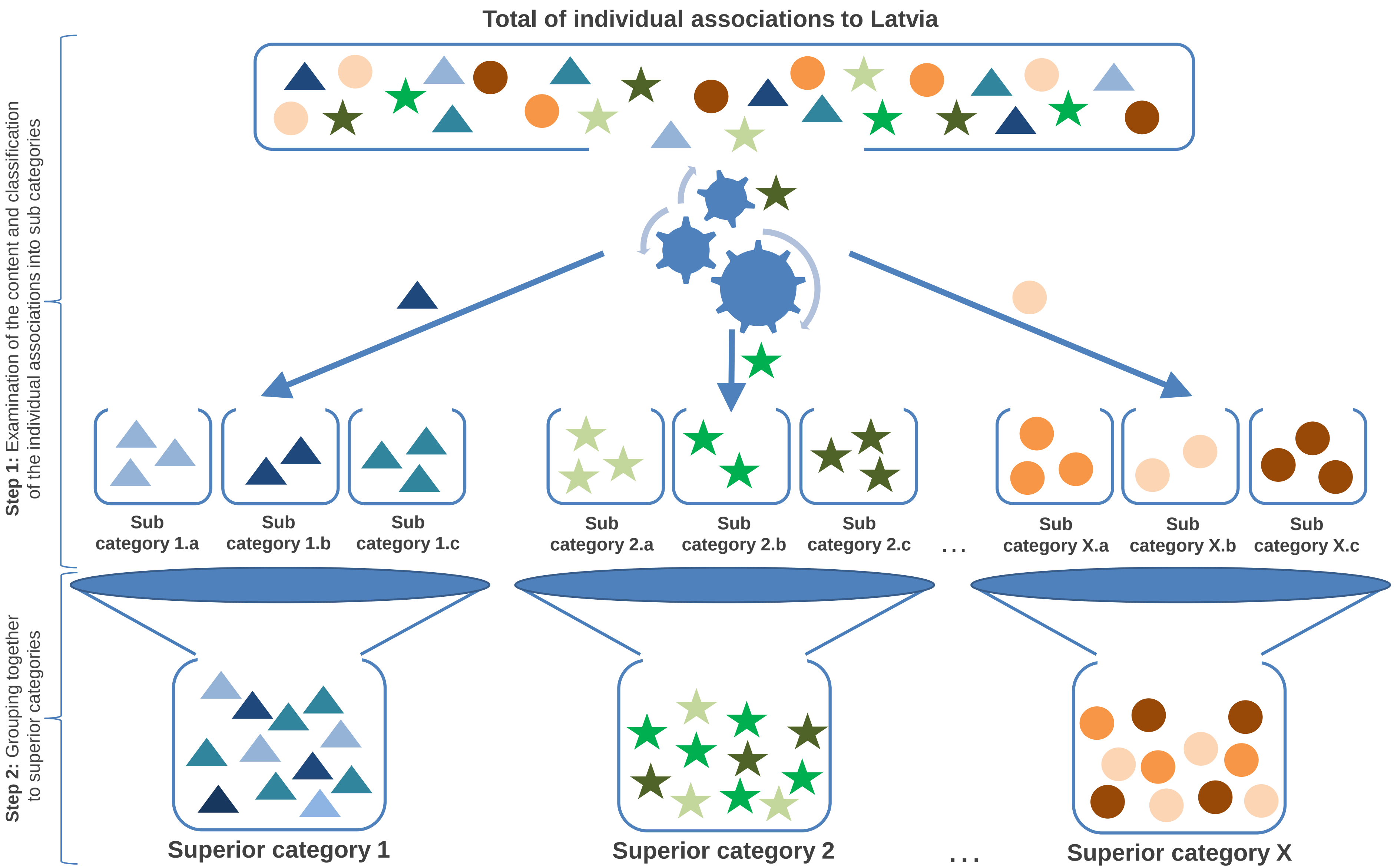
Competent partner network

Widened scope of analysed source markets (DE | AT | CH | NL | CN)

Basis of the analysis: Open-ended question without any limits in terms of content

Total amount of individual associations: 1,739

4.1 Methods of the profile study Destination Brand 19 – *Procedure of categorisation*



4.1 Methods of the profile study Destination Brand 19

In total, **55 different tourist destinations** were included in the survey of the study Destination Brand 19 running in the period of November / December 2019. Since some of the destinations were surveyed in two or more source markets, the five source market-specific destination pools cover a higher number of tourist destinations in total. Their distribution is as follows: DE = 45 | AT = 8 | CH = 12 | NL = 8 | CN = 10. The selection of the destinations to be considered was done by inspektour in cooperation with the IMT of the FH Westküste (University of Applied Sciences).

In total: 55 different tourist destinations

In total, **8,000 respondents were surveyed online in their respective national language** in the course of the study Destination Brand 19. The sample sizes per source market are as follows: DE: n = 4,000 | all other source markets each: n = 1,000. The field work was carried out, managed and controlled by the Ipsos Operations GmbH. In this process, in each source market (sub-) samples of 1,000 respondents were used. Each of these (sub-) samples is representative for 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”).

Population-representative online surveys

Only the survey in the source market China constitutes a deviation from the previous representativeness statement. Here the basic population of the survey is formed by the Chinese-speaking urban population (including the top city categories “Tier 1-3”) aged 14-59 years with Internet access.

Basic population in the source market China

In the main part of the survey on destination-specific spontaneous associations **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 = 1,005). 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

Conditions for the “affinity to travel abroad” in the source market China

4.1 Methods of the profile study Destination Brand 19

The resulting number of respondents for all considered destinations with regard to the measurement of spontaneous associations is at least 1,000. This comprehensive sample size generally permits the conduction of **more detailed and statistically secured analyses of the top 20 association sub categories**. These comprise:

- A differentiation by the **sub-groups** (see chapter 2.5):
  - "Brand connoisseurs" (know the tourist destination Latvia (when it is provided as an answer option) – even if only by name)
  - "Visitors in the past" (have already holidayed in the tourist destination Latvia (with at least one overnight stay))
  - Respondents with a "distinct intention to travel abroad" (definitely (top value) intend to spend a short holiday trip (with 1 – 3 overnight stays) and / or a longer holiday trip (with 4 or more overnight stays) abroad within the next 3 years)
- Several **target group specific differentiations**:
  - The standard target group analysis with a **total of 3-6 individually relevant target groups** (see chapter 6.1):
    - For this purpose, the Investment and Development Agency of Latvia individually selected the target groups "Interested in city breaks", "Interested in nature", "Interested in culture", "Interested in culinary", "Interested in nature and cycling" and "Interested in relaxing".
  - The target group analysis by the **"9+1 types of holiday makers"** (see chapter 6.2):
    - This is a target group segmentation developed by the Institute for Management and Tourism (IMT) of the FH Westküste (University of Applied Sciences) supported by inspektour, which is based on the general interest of the German population in holiday themes.
    - Further information can be found in the chapters 4.3 (see brief introduction to the typology of holiday makers) as well as 8.2 (see fact sheets about each type of holiday makers).

The methodological explanations conclude with the following two additional remarks:

- For further details, please refer to the **appendix** (see chapter 8), which includes among others some **descriptive reading examples**, a glossary of the most important terms as well as an explanation of the margin of error (confidence intervals for different sample sizes).
- Please note that any deviations of the sum of added percent values are due to rounding differences.

Detailed bivariate analysis of the top 20 association sub categories

Differentiation by sub groups

Several target group specific differentiations

Appendix: Descriptive reading examples

Outline

4.2 Overview of the considered destinations

	DE	AT	CH	NL	CN
1. Allgäu	■				
2. Austria					■
3. Bavaria	■				
4. Bavarian Forest	■				
5. Bergisches Land	■				
6. Berlin	■				■
7. Black Forest	■		■		■
8. City of Cottbus	■				
9. Dresden	■	■	■	■	
10. Duisburg	■				
11. Düsseldorf	■		■	■	■
12. East Frisian Islands	■				
13. Erzgebirge	■				
14. France		■			■
15. Franconia - wine.beautiful.country	■				
16. Garmisch-Partenkirchen		■	■		
17. German Fairy Tale Route	■				
18. Germany		■	■	■	■
19. Great Britain	■				
20. Havelland	■				
21. Ireland		■	■		
22. Island of Usedom	■				
23. Italy	■				
24. Karlsruhe	■		■	■	
25. Kassel	■				
26. Langeoog	■				
27. **Latvia**	■	■	■		
28. Leipzig	■				
29. London					■
30. Lüneburg Heath	■				
31. Luxembourg	■	■	■	■	
32. Munich	■				
33. Münsterland	■				
34. Netherlands	■				
35. Norderney	■				
36. North Rhine-Westphalia	■				
37. Paris					■
38. Rheingau	■				
39. Rhön	■			■	
40. Rothenburg ob der Tauber	■				
41. Saarland	■				
42. Salzburger Land	■				
43. Saxonian Elbland	■				
44. Saxony	■	■	■	■	
45. Saxony-Anhalt	■				
46. Schleswig-Holstein Wadden Sea National Park	■				
47. Spain					■
48. Stuttgart	■				
49. Switzerland					■
50. Upper Palatinate Forest	■				
51. Vorarlberg	■		■		
52. Weserbergland	■				
53. Western Pomerania	■				
54. Wilder Kaiser - Ellmau, Going, Scheffau, Söll			■		
55. Winterberg	■			■	

Note 1: The source markets are marked in green, if the respective destination was surveyed there in the course of the study Destination Brand 19.
Note 2: Last survey taken into consideration November / December 2019

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

Outline

4.3 Brief introduction to the “9+1 types of holiday makers”

Point of origin:
What are the “9+1 types of holiday makers”? These are target groups based on the holiday interests of the German population. They were developed last year 2019 by the Institute for Management and Tourism (IMT) of the FH Westküste (University of Applied Sciences) on the basis of a population-representative Destination Brand sample with 34,000 respondents using multivariate methods. In this endeavor the IMT was supported by inspektour.

9+1 – A benefit-oriented target group segmentation:
Target group segmentations can often be found within the scientific tourism literature. To create these, the most diverse topics can serve as a database. Eisenstein and Harms (2019) cite the following: “In addition to approaches that include socio-demographic characteristics (e.g. Crask 1981; Davidson 2011), behavioral variables (e.g. Svensson et al. 2011; GfK and IMT 2015) or emotional states are used (e.g. Wang/Beise-Zee 2013) [...].” (p. 383 – translated from German).

A benefit-oriented segmentation approach was selected for 9+1. This aims at a causal relationship between need and use or purchase (Haley 1968, p. 31). A market segment thus exists because the potential guest expects a concrete benefit from the tourist experience. Some authors therefore consider the benefit-oriented approach to be among the best segmentation approaches (Jang et al. 2002, p. 367; Weinstein 2008, pp. 1). Ultimately, such a segmentation has also not yet been available for the German travel market.

Data base and sample:
The data base for the target group segmentation 9+1 is formed by the assessments of the general (i.e. regardless of a specific destination) interest in 61 different holiday themes. The sample consists of the 34,000 respondents of the studies Destination Brand 16 & 17 (each representative of the German-speaking population aged 14 to 74 years living in private households). Since the assessment of the general interest in holiday themes was carried out with the same parameters in both years 2016 and 2017, it was possible to combine both samples.

Fact Sheet:

- **Why benefit-oriented?**
  - Not yet available for the German market
  - Focuses on the actual needs of the customers
- **Sample:**
  - 34,000 respondents of the studies Destination Brand 16 & 17

4.3 Brief introduction to the "9+1 types of holiday makers"

Segmentation and description of the clusters:
Due to the high number of 61 available holiday themes, all of them were checked in a first step regarding their suitability of content for the further procedure. In the end, 52 themes could be included in the analysis. The actual segmentation took place in two steps:

- **Step 1:** By means of a factor analysis (principal component analysis) the individual themes were condensed into 20 so-called theme factors. This facilitated the interpretation and prevented that overlapping themes distort the results.
- **Step 2:** On this basis, the overall market was then segmented into different types of holiday makers by means of a cluster analysis. This resulted in 10 clusters representing 10 segments, whose subjects within the segment are largely similar in terms of their interest in holiday themes, but differ significantly from subjects in other segments.

Finally, a detailed description of the target groups was made on the basis of these data sources. This serves both as a supplementary interpretation and as a check of the plausibility of the cluster content. Since it is possible for each respondent to refer back to the interest in the 61 original holiday themes, it was possible to check whether the multivariate analyses led to undesired distortions of the actual theme preferences. This was not the case. In addition to the 61 original holiday themes within the Destination Brand study series, a wide range of (in some cases additional) information from three areas was available for the final description of the clusters:

1. The general relevance of destination attributes and characteristics for the choice of destination (based on the profile studies of Destination Brand; applicable to the 2017 theme sample)
2. The different socio-demographic characteristics (part of all Destination Brand sub studies)
3. The respective so-called "BIG 5" personality traits (additionally surveyed in the Destination Brand study series)

Further steps:
The present segmentation is a self-contained and coherent intermediate step for the applied data base of the 61 holiday themes assessed. In a next step, additional available data will be included in the segmentation in 2020.

Further Information:
Eisenstein, B., Harms, T. (2019): 9+1 – Die interessensbasierte Urlaubertypologie der Deutschen. In: Eisenstein, B., Reif, J. (eds.): Tourismus und Gesellschaft: Kontakte – Konflikte – Konzepte. (= Schriften zu Tourismus und Freizeit, 24), Göttingen, pp. 381-391.

Fact sheet

► **Data base:**
- assessments of the general interest in 61 different holiday themes

► **Segmentation:**
- **Step 1:** By means of principal component analysis the individual topics were condensed into 20 so-called theme factors
- **Step 2:** Cluster analysis resulting in 10 segments

► **Description of segments via:**
- General interest in the 61 original holiday themes
- General relevance of 67 destination attributes and characteristics for the choice of destination
- Socio-demographic characteristics
- "BIG 5" personality traits

in cooperation with:

FH Westküste
University of Applied Sciences

4.3 Brief introduction to the "9+1 types of holiday makers"

Ø Deviation of the clusters with regard to the theme factors from all respondents

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Theme factors \ Clusters	Sports / Nature 1 (C3)	Sports / Nature 2 (C4)	Sports / Nature 3 (C2)	Culture 1 (C6)	Culture 2 (C10)	Culture 3 (C1)	Beach / Recreation (C5)	Multi-Experience 1 (C8)	Multi-Experience 2 (C9)	General Disinterest (C7)
Sports and extreme sports	+++	-	--	--	--	--	0	++	+	-
Slow sports	+++	--	+++	-	0	-	+	---	-	0
Cycling and e-biking	0	+++	++	--	--	-	-	0	0	-
Fishing	++	0	0	+	0	0	-	0	--	0
Health and wellness	0	0	++	+++	--	-	--	+	-	-
Barrier-free holiday	++	0	0	+	+	-	-	0	-	0
Hiking / enjoying nature	-	0	++	0	+	0	+	0	+	---
Visiting the countryside / horse riding	+	+++	--	0	0	0	0	--	0	0
Winter by the sea	0	+	+	-	0	+	--	-	+	0
Camping	+	0	-	0	0	0	0	+	0	0
Classical culture and historic sights	+	0	0	++	++	++	--	---	++	---
Romance and fairy tales	0	0	0	--	+++	0	-	+	--	0
Industrial heritage	+	-	-	-	---	+++	0	-	-	0
Events, festivals, nightlife	0	0	0	--	0	0	--	+++	++	-
Theme parks and zoos	0	+	-	+	0	0	+	0	---	-
Swimming / being at the beach	-	0	0	0	---	0	++	+	+	-
Family holiday	0	0	0	--	0	0	++	0	0	0
Beer and wine tastings	+	-	0	0	0	+	-	0	0	0
Shopping	0	0	0	0	0	0	++	+	0	--
Ferry and cruise holiday	0	0	+	0	0	+	0	+	--	-

Source: *Institute for Management and Tourism (IMT) and inspektour GmbH, 2016 / 2017*

Average deviation of clusters to all respondents:

	-0,7	-0,4	-0,2	0,2	0,4	0,7	
very negative	---	--	-	0	+	++	+++	very positive

4.3 Brief introduction to the “9+1 types of holiday makers”

Textual summary of the essential characteristics

Type of holiday makers	Essential characteristics: (Clearly) above-average holiday interest in, among others:	Essential characteristics: (Clearly) overrepresented socio-demographic characteristics, among others:
Sports / Nature 1 (C3)	“Surfing / kiting” (I = 379), “Climbing” (I = 322), “Mountain biking” (I = 286), “Playing golf” (I = 457) and “Nordic walking” (I = 293)	Male, younger age cohorts up to 34 years, larger households with children as well as employees with managerial function, skilled workers and pupils / students / apprentices / volunteers
Sports / Nature 2 (C4)	“Using e-bikes / pedelecs / electric bikes” (I = 266), “Cycling” (I = 202), “Mountain biking” (I = 142), “Horse riding” (I = 188) and “Holiday in the countryside” (I = 174)	Age cohorts between 35 and 64 years, lower education level, households with (younger) children as well as employees without managerial function, skilled workers and retirees
Sports / Nature 3 (C2)	“Nordic walking” (I = 331), “Using health services” (I = 198), “Yoga / meditation” (I = 197), “Cycling” (I = 168) and “Hiking” (I = 166)	Female, older age cohorts over 45 years, intermediate education level, smaller households without children, (slightly) elevated net household income, from small cities as well as civil servants and retirees
Culture 1 (C6)	“Using health services” (I = 188), “Using wellness services” (I = 154), “Visiting castles, mansions, parks and gardens” (I = 137), “Visiting (art) museums and exhibitions” (I = 133) and “Visiting zoos” (I = 134)	Female, older age cohorts over 55 years, intermediate education level, smaller households without children, smaller net household income, from major cities as well as self employed, housewives / househusbands and retirees
Culture 2 (C10)	“Visiting castles, palaces and cathedrals” (I = 150), “Visiting gardens / parks” (I = 138), “Visiting traditional events” (I = 125), “Experiencing fairy tales and legends” (I = 153) and “Experiencing romance” (135)	Female, older age cohorts over 55 years, lower to intermediate education level, smaller households without children, smaller to intermediate net household income, from small cities as well as housewives / househusbands and retirees
Culture 3 (C1)	“Experiencing mining” (I = 309), “Visiting industrial heritage sites” (I = 291), “Experiencing Bauhaus and architecture of classical modernism” (I = 159), “Visiting (art) museums and exhibitions” (I = 152) and “Beer trip” (I = 161)	Male, older age cohorts between 45 and 64 years, very high education level, households without children, (very) high net household income, from big cities as well as self employed, employees with managerial function and retirees
Beach / Recreation (C5)	“Family holiday” (I = 145), “Swimming and being at the beach” (I = 132), “Shopping” (I = 135), “Visiting amusement / theme parks” (I = 122) and “Visiting zoos” (I = 108)	Younger and intermediate age cohorts up to 44 years, larger households with children, (very) high net household income as well as employees without managerial function, civil servants and housewives / househusbands
Multi-Experience 1 (C8)	“Motorcycling” (I = 257), “Practising water sports (not sailing)” (I = 181), “Practising winter sports” (I = 151), “Attending events” (I = 175) and “Experiencing lively places” (I = 168)	Male, younger age cohorts up to 34 years (especially up to 24 years), high education level, larger households, (very) high net household income and pupils / students / apprentices / volunteers
Multi-Experience 2 (C9)	“Experiencing Bauhaus and architecture of classical modernism” (I = 190), “Visiting (art) museums and exhibitions” (I = 168), “Experiencing lively places” (I = 158), “Visiting culture / music festivals” (I = 157) and “Sports holiday” (I = 180)	Younger age cohorts up to 34 years, very high education level, very high net household income, from major cities as well as pupils / students / apprentices / volunteers, self employed, civil servants and employees with managerial function
General Disinterest (C7)	No themes	Male, old age cohorts over 55 years, lower education level, smaller households without children, smaller net household income as well as retirees / not working, housewives / househusbands and skilled workers

Explanation of the overview: It shows selected key interests in holiday themes and socio-demographic characteristics that are overrepresented among the segments **compared to the whole represented German population aged 14 to 74 years**. The higher the **index-value**, the more above-average the interest in the holiday theme. For example, the index value of 379 for the holiday interest in “surfing / kiting” of the holiday maker type “Sports / Nature 1” (C3) means that this cluster has 3.79 times as much interest in this theme as the total number of respondents in average.

Source: Institute for Management and Tourism (IMT) and inspektour GmbH, 2016 / 2017

Outline

5.1 Spontaneous associations – *Cat. 1 “landscape / nature in general”*

Spontaneous associations in category 1:

“landscape / nature in general”

*> What springs spontaneously to your mind when thinking of the foreign tourist destination **Latvia**?*

Latvia
Source market: Germany
Base: All respondents
Number of respondents: 1,000
Associations to category 1

	Spontaneous associations in category 1: *“landscape / nature in general”*	% of respondents	% of responses	Number of individual responses
1	(beautiful, great, diverse) landscape (surroundings, area) / (beautiful, much, pure) nature	6.2%	3.6%	62
2	reindeer / moose	3.3%	1.9%	33
3	(much, beautiful) forest(s) / (green) meadows / (much) green / (many) green spaces	2.4%	1.4%	24
4	wide / wide plain / flat (country) / even	1.9%	1.1%	19
5	national parks / originally	0.8%	0.5%	8
6	rural (region)	0.6%	0.3%	6
	various other specific animal species, e.g. cows, game, geese, sheep	1.0%	0.6%	10
	further associations to the category 1 “landscape / nature in general”* (e.g. farmers, farms, northern lights, rocks)	0.5%	0.3%	5
	sum of individual responses belonging to category 1	**16.7%**	**9.6%**	**167**

* Sum of further associations belonging to the category with less than 5 individual responses each.

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

5.2 Spontaneous associations – *Cat. 2 "general geographical location"*

Spontaneous associations in category 2:

"general geographical location"

*> What springs spontaneously to your mind when thinking of the foreign tourist destination **Latvia**?*

■ ***Latvia***

Source market: Germany
Base: All respondents
Number of respondents: 1,000
Associations to category 2

	Spontaneous associations in category 2: *"general geographical location"*	% of respondents	% of responses	Number of individual responses
1	(belongs to the) Baltic States / Baltic / Estonia / Lithuania	7.1%	4.1%	71
2	(close to, borders) Russia / (many) Russians	2.5%	1.4%	25
3	(located in the) North / northern / nordic	1.9%	1.1%	19
4	(located in the) East	1.8%	1.0%	18
5	(located in, Eastern) Europe	1.3%	0.7%	13
	wrong geographical assignment (e.g. Amsterdam, Belgium, North Sea island, Norway, Scandinavia, The Hague)	1.4%	0.8%	14
	further associations to the category 2 "general geographical location"* (e.g. abroad, north-east)	0.3%	0.2%	3
	sum of individual responses belonging to category 2	**16.3%**	**9.4%**	**163**

* Sum of further associations belonging to the category with less than 5 individual responses each.

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

5.3 Spontaneous associations – *Cat. 3 "general positive assessment / well-being"*

Spontaneous associations in category 3:
"general positive assessment / well-being"
*> What springs spontaneously to your mind when thinking of the foreign tourist destination **Latvia**?*

■ ***Latvia***
Source market: Germany
Base: All respondents
Number of respondents: 1,000
Associations to category 3

DESTINATION BRAND 19	Spontaneous associations in category 3: *"general positive assessment / well-being"*	% of respondents	% of responses	Number of individual responses
1	general positive evaluation (e.g. (very) beautiful, cool, interesting, great, pretty, super, wonderful)	3.9%	2.2%	39
2	(nice, friendly, cordial) people / hospitable / friendliness / open-minded / sympathetic / warm-hearted / cosmopolitan	3.4%	2.0%	34
3	different / extraordinary / exotic / fascinating / mysterious / inspiration / exciting / many new things	1.8%	1.0%	18
4	(much) quietness / calm / cosy / idyllic	1.1%	0.6%	11
4	recreation (pure) / recreative / relaxation / deceleration / breath deeply	1.1%	0.6%	11
6	(very beautiful, pretty) women / love / romantic	0.9%	0.5%	9
7	(much) fun / pleasure / joie de vivre	0.7%	0.4%	7
	further associations to the category 3 "general positive assessment / well-being"* (e.g. enjoyment, exclusive, freshness, good smell, healthy, Nordic flair, sobriety)	0.7%	0.4%	7
	sum of individual responses belonging to category 3	**13.6%**	**7.8%**	**136**

* Sum of further associations belonging to the category with less than 5 individual responses each.

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

5.4 Spontaneous associations – *Cat. 4 "weather / climate in general"*

Spontaneous associations in category 4:

"weather / climate in general"

*> What springs spontaneously to your mind when thinking of the foreign tourist destination **Latvia**?*

■ ***Latvia***
Source market: Germany
Base: All respondents
Number of respondents: 1,000
Associations to category 4

	Spontaneous associations in category 4: *"weather / climate in general"*	% of respondents	% of responses	Number of individual responses
1	cold / coldness / ice / frost	9.8%	5.6%	98
2	(much) snow	2.1%	1.2%	21
	further associations to the category 4 "weather / climate in general"* (e.g. good air, rain, winter)	0.3%	0.2%	3
	sum of individual responses belonging to category 4	**12.2%**	**7.0%**	**122**

* Sum of further associations belonging to the category with less than 5 individual responses each.

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

5.5 Spontaneous associations – *Cat. 5 “beach / coast / water”*

Spontaneous associations in category 5:

“beach / coast / water”

> What springs spontaneously to your mind when thinking of the foreign tourist destination ***Latvia****?*

■ ***Latvia***
Source market: Germany
Base: All respondents
Number of respondents: 1,000
Associations to category 5

	DESTINATION BRAND 19 **Spontaneous associations in category 5:** ***“beach / coast / water”***	**% of respondents**	**% of responses**	**Number of individual responses**
1	(located at the) Baltic Sea (coast) / (at the) sea / (at, much) water	8.2%	4.7%	82
2	(sandy) beach / (beautiful, lonely) beaches / sand / dunes	1.0%	0.6%	10
	further associations to the category 5 “beach / coast / water”* (e.g. amber, fjords, Gauja, geysers, lakes, springs)	0.7%	0.4%	7
	sum of individual responses belonging to category 5	**9.9%**	**5.7%**	**99**

* Sum of further associations belonging to the category with less than 5 individual responses each.

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

5.6 Spontaneous associations – *Cat. 6 "places, cities and regions in and around Latvia incl. attributes"*

Spontaneous associations in category 6:

"places, cities and regions in and around Latvia incl. attributes"

*> What springs spontaneously to your mind when thinking of the foreign tourist destination **Latvia**?*

■ ***Latvia***
Source market: Germany
Base: All respondents
Number of respondents: 1,000
Associations to category 6

	Spontaneous associations in category 6: *"places, cities and regions in and around Latvia incl. attributes"*	**% of respondents**	**% of responses**	**Number of individual responses**
1	(capital) Riga	7.1%	4.1%	71
2	(old, interesting, beautiful, great) cities	1.1%	0.6%	11
	various other places, cities and regions in Latvia and its surroundings (e.g. Jurmala, Saulkrasti, Sigulda, Tallinn)	0.7%	0.4%	7
	sum of individual responses belonging to category 6	**8.9%**	**5.1%**	**89**

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

5.7 Spontaneous associations – *Cat. 7 "sights / attractions / events"*

Spontaneous associations in category 7:

"sights / attractions / events"

*> What springs spontaneously to your mind when thinking of the foreign tourist destination **Latvia**?*

■ ***Latvia***
Source market: Germany
Base: All respondents
Number of respondents: 1,000
Associations to category 7

	DESTINATION BRAND 19 **Spontaneous associations in category 7:** ***"sights / attractions / events"***	**% of respondents**	**% of responses**	**Number of individual responses**
1	(much, great) culture / cultural interesting / cultural heritage	2.4%	1.4%	24
2	(beautiful) architecture / (beautiful, great) buildings (constructions) / (beautiful) old town / great restored / Art Nouveau (metropolis Riga)	1.3%	0.7%	13
3	(many) sights / worth seeing / varied / diverse	1.2%	0.7%	12
4	(good, interesting) history / historical	1.1%	0.6%	11
5	Riga Cathedral / Petri Church / Evangelical Lutheran Church	0.6%	0.3%	6
6	port / Hanseatic League / hanseatic elements / ships	0.5%	0.3%	5
	further associations to the category 7 "sights / attractions / events"* (e.g. castle Rundāle, central market, circus, ESC participants, freedom monument, music, Olympics, open-air museum, singing festivals, snow queen, Wallander)	1.3%	0.7%	13
	sum of individual responses belonging to category 7	**8.4%**	**4.8%**	**84**

* Sum of further associations belonging to the category with less than 5 individual responses each.

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

5.8 Spontaneous associations – *Cat. 8 "policy related associations to Latvia"*

Spontaneous associations in category 8:

"policy related associations to Latvia"

*> What springs spontaneously to your mind when thinking of the foreign tourist destination **Latvia**?*

Latvia
Source market: Germany
Base: All respondents
Number of respondents: 1,000
Associations to category 8

	Spontaneous associations in category 8: *"policy related associations to Latvia"*	% of respondents	% of responses	Number of individual responses
1	former Soviet Union / former UDSSR / former Eastern Block / Russian influenced / Soviet influenced	3.5%	2.0%	35
2	European Union / EU member / Euro (country, as means of payment)	1.2%	0.7%	12
3	independence / independent / complete isolation / young country	0.9%	0.5%	9
4	connection to Germany / collaboration / German friendly / very German	0.5%	0.3%	5
	further associations to the category 8 "policy related associations to Latvia"* (e.g. NATO (manoeuvres), Putin, safe)	0.6%	0.3%	6
	sum of individual responses belonging to category 8	**6.7%**	**3.9%**	**67**

* Sum of further associations belonging to the category with less than 5 individual responses each.

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

5.9 Spontaneous associations – *Cat. 9 "tradition & customs / regionality / culinary in general"*

Spontaneous associations in category 9:

"tradition & customs / regionality / culinary in general"

*> What springs spontaneously to your mind when thinking of the foreign tourist destination **Latvia**?*

■ ***Latvia***
Source market: Germany
Base: All respondents
Number of respondents: 1,000
Associations to category 9

	Spontaneous associations in category 9: ***"tradition & customs / regionality / culinary in general"***	**% of respondents**	**% of responses**	**Number of individual responses**
1	culinary in general, e.g. (good, other, tasty) food, beer, cheese, gastronomy, salted fish, vodka	1.8%	1.0%	18
2	(ancient, other) traditions / traditional / customs / folklore	1.2%	0.7%	12
3	(other, foreign, interesting, Eastern Baltic) language / Latvian	1.1%	0.6%	11
4	folk costumes / earmuffs / linens	0.5%	0.3%	5
4	Latvians	0.5%	0.3%	5
	further associations to the category 9 "tradition & customs / regionality / culinary in general"* (e.g. Christmas, different cultures, Ligo, Santa Claus, similar to Sweden, St. John's Day, wreaths of flowers and dance)	0.6%	0.3%	6
	sum of individual responses belonging to category 9	**5.7%**	**3.3%**	**57**

* Sum of further associations belonging to the category with less than 5 individual responses each.

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

5.10 Spontaneous associations – *Cat. 10 "holiday in general / holiday and leisure activities"*

Spontaneous associations in category 10:

"holiday in general / holiday and leisure activities"

*> What springs spontaneously to your mind when thinking of the foreign tourist destination **Latvia**?*

Latvia
Source market: Germany
Base: All respondents
Number of respondents: 1,000
Associations to category 10

	Spontaneous associations in category 10: *"holiday in general / holiday and leisure activities"*	% of respondents	% of responses	Number of individual responses
1	(city, ship, dream) journey (would certainly be interesting) / (beautiful) holiday / (travel, dream) destination / curiosity	1.0%	0.6%	10
1	cheap / inexpensive / reasonable	1.0%	0.6%	10
3	various holiday and leisure activities, e.g. basketball, hiking, ice hockey, tobogganing, sauna, sledging	0.7%	0.4%	7
	further associations to the category 10 "holidays in general / holiday and leisure activities"* (e.g. Baltic Airlines, camping sites, discovery, entry requirements, excursions, for old people, many shops, spa facilities, tidy, very clean)	1.2%	0.7%	12
	sum of individual responses belonging to category 10	**3.9%**	**2.2%**	**39**

* Sum of further associations belonging to the category with less than 5 individual responses each.

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

5.11 Spontaneous associations – *Cat. 11 "negative associations to Latvia"*

Spontaneous associations in category 11:

"negative associations to Latvia"

*> What springs spontaneously to your mind when thinking of the foreign tourist destination **Latvia**?*

Latvia
Source market: Germany
Base: All respondents
Number of respondents: 1,000
Associations to category 11

	Spontaneous associations in category 11: *"negative associations to Latvia"*	% of respondents	% of responses	Number of individual responses
1	boring / old-fashioned / wasteland / nothing special / dreary / unattractive / not very fascinating / does not suit my personal taste	1.3%	0.7%	13
2	poor / poverty / poor population / run-down / ailing	1.0%	0.6%	10
3	car theft / drugs / crime / criminal act / unsafe / corruption	0.5%	0.3%	5
	further associations to the category 11 "negative associations to Latvia"* (e.g. arrogance, dark, expensive, inaccessible, irrelevant, lonely)	0.9%	0.5%	9
	sum of individual responses belonging to category 11	**3.7%**	**2.1%**	**37**

* Sum of further associations belonging to the category with less than 5 individual responses each.

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

5.12 Spontaneous associations – *Cat. 12 "economic development & (digital) infrastructure"*

Spontaneous associations in category 12:

"economic development & (digital) infrastructure"

*> What springs spontaneously to your mind when thinking of the foreign tourist destination **Latvia**?*

■ ***Latvia***
Source market: Germany
Base: All respondents
Number of respondents: 1,000
Associations to category 12

	Spontaneous associations in category 12: ***"economic development & (digital) infrastructure"***	**% of respondents**	**% of responses**	**Number of individual responses**
1	modern / innovative / innovation / highest degree of digitalisation / digital top / internet / Wifi	1.6%	0.9%	16
2	aspiring / has developed well / expansion / education / development / research / start-up scene / universities	0.7%	0.4%	7
	further associations to the category 12 "economic development & (digital) infrastructure"* (e.g. ecological, P2P loans)	0.3%	0.2%	3
	sum of individual responses belonging to category 12	**2.6%**	**1.5%**	**26**

* Sum of further associations belonging to the category with less than 5 individual responses each.

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

5.13 Spontaneous associations – *Cat. 13 "general country-related associations"*

Spontaneous associations in category 13:

"general country-related associations"

*> What springs spontaneously to your mind when thinking of the foreign tourist destination **Latvia**?*

■ ***Latvia***
Source market: Germany
Base: All respondents
Number of respondents: 1,000
Associations to category 13

	Spontaneous associations in category 13: ***"general country-related associations"***	**% of respondents**	**% of responses**	**Number of individual responses**
1	small country / small	1.7%	1.0%	17
	further associations to the category 13 "general country-related associations"* (e.g. beautiful country, great country, country in general)	0.7%	0.4%	7
	sum of individual responses belonging to category 13	**2.4%**	**1.4%**	**24**

* Sum of further associations belonging to the category with less than 5 individual responses each.

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

5.14 Spontaneous associations – *Cat. 14 “distance / accessibility / personal relation”*

Spontaneous associations in category 14:

“distance / accessibility / personal relation”

*> What springs spontaneously to your mind when thinking of the foreign tourist destination **Latvia**?*

■ ***Latvia***
Source market: Germany
Base: All respondents
Number of respondents: 1,000
Associations to category 14

	DESTINATION BRAND 19 — **Spontaneous associations in category 14:** ***“distance / accessibility / personal relation”***	% of respondents	% of responses	Number of individual responses
1	far away / difficult to reach	1.8%	1.0%	18
	further associations to the category 14 “distance / accessibility / personal relation”* (e.g. easy to reach, family, relatives, friends)	0.4%	0.2%	4
	sum of individual responses belonging to category 14	**2.2%**	**1.3%**	**22**

* Sum of further associations belonging to the category with less than 5 individual responses each.

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

5.15 Spontaneous associations – *Cat. "further associations to Latvia without category allocation"*

Spontaneous associations in category:

"further associations to Latvia without category allocation"

*> What springs spontaneously to your mind when thinking of the foreign tourist destination **Latvia**?*

■ ***Latvia***
Source market: Germany
Base: All respondents
Number of respondents: 1,000
Further associations without category allocation

DESTINATION BRAND 19 Spontaneous associations in category: *"further associations to Latvia without category allocation"*	% of respondents	% of responses	Number of individual responses
further associations to Latvia without category allocation* (e.g. Heinz Erhardt, thinly populated, truck)	0.7%	0.4%	7
sum of individual responses to Latvia without category allocation	**0.7%**	**0.4%**	**7**

* Sum of further associations belonging to the category with less than 5 individual responses each.

Source: *inspektour (international) GmbH / IMT of the FH Westküste, 2019*

Outline

6.1 Standard target group analysis

Target group definitions – in coordination with the Investment and Development Agency of Latvia (part 1 of 2)

"Interested in city breaks"

- Respondents with distinct intention to travel abroad and
- Age of respondents: 25-74 years and
- General interest in holiday activity "Taking a city break"
  (top-two-box on a scale from "5 very interested" to "1 = not at all interested")

"Interested in nature"

- Respondents with distinct intention to travel abroad and
- Age of respondents: 25-74 years and
- General interest in holiday activity "Enjoying nature"
  (top-two-box on a scale from "5 very interested" to "1 = not at all interested")

"Interested in culture"

- Respondents with distinct intention to travel abroad and
- Age of respondents: 25-74 years and
- General interest in holiday activity "Visiting cultural institutions / using cultural services"
  (top-two-box on a scale from "5 very interested" to "1 = not at all interested")

6.1 Standard target group analysis

Target group definitions – in coordination with the Investment and Development Agency of Latvia (part 2 of 2)

"Interested in culinary"

- Respondents with distinct intention to travel abroad <u>and</u>
- Age of respondents: 25-74 years <u>and</u>
- General interest in holiday activity "Enjoying culinary / gastronomic specialities"
  (top-two-box on a scale from "5 very interested" to "1 = not at all interested")

"Interested in nature and cycling"

- Respondents with distinct intention to travel abroad <u>and</u>
- Age of respondents: 25-74 years <u>and</u>
- General interest in holiday activity "Enjoying nature" <u>and</u>
  (top-two-box on a scale from "5 very interested" to "1 = not at all interested")
- General interest in holiday activity "Cycling (not mountain biking)"
  (top-two-box on a scale from "5 very interested" to "1 = not at all interested")

"Interested in relaxing"

- Respondents with distinct intention to travel abroad <u>and</u>
- Age of respondents: 35-74 years <u>and</u>
- General interest in holiday activity "Relaxing and resting"
  (top-two-box on a scale from "5 very interested" to "1 = not at all interested")

6.1 Standard target group analysis

Overall top 20 association sub categories – *by target groups*

*> What springs spontaneously to your mind when thinking of the foreign tourist destination **Latvia**?*
> in % of respondents

■ ***Latvia***
Source market: Germany
Base: All respondents by individual target groups*
Number of respondents: 1,000
Top 20 sub categories – part 1 of 2

	Overall top 20 association sub categories – *by target groups* (*in % of respondents*)	**All respondents**	**Interested in city breaks**	**Interested in nature**	**Interested in culture**	**Interested in culinary**	**Interested in nature and cycling**	**Interested in relaxing**
1	cold / coldness / ice / frost	**9.8%**	13.4%	12.6%	12.1%	13.2%	7.4%	11.4%
2	(located at the) Baltic Sea (coast) / (at the) sea / (at, much) water	**8.2%**	9.6%	10.5%	10.9%	9.9%	12.8%	11.0%
3	(belongs to the) Baltic States / Baltic / Estonia / Lithuania	**7.1%**	12.4%	11.1%	8.8%	9.9%	8.7%	10.7%
3	(capital) Riga	**7.1%**	8.7%	9.0%	7.5%	8.1%	5.4%	8.5%
5	(beautiful, great, diverse) landscape (surroundings, area) / (beautiful, much, pure) nature	**6.2%**	9.9%	9.6%	10.9%	9.3%	10.1%	9.6%
6	general positive evaluation (e.g. (very) beautiful, cool, interesting, great, pretty, super, wonderful)	**3.9%**	4.7%	5.7%	5.0%	5.4%	8.1%	5.3%
7	former Soviet Union / former UDSSR / former Eastern Block / Russian influenced / Soviet influenced	**3.5%**	5.3%	6.0%	5.4%	5.7%	5.4%	6.4%
8	(nice, friendly, cordial) people / hospitable / friendliness / open-minded / sympathetic / warm-hearted / cosmopolitan	**3.4%**	4.0%	4.2%	2.9%	4.8%	7.4%	3.6%
9	reindeer / moose	**3.3%**	4.3%	4.8%	5.0%	3.9%	3.4%	3.9%
10	(close to, borders) Russia / (many) Russians	**2.5%**	2.5%	1.5%	2.1%	2.1%	2.0%	1.4%

* Due to the multiple response option, no significance test for the differentiation by target groups can be carried out for methodological reasons.

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

6.1 Standard target group analysis

Overall top 20 association sub categories – *by target groups*

*> What springs spontaneously to your mind when thinking of the foreign tourist destination **Latvia**?*
> in % of respondents

■ ***Latvia***
Source market: Germany
Base: All respondents by individual target groups*
Number of respondents: 1,000
Top 20 sub categories – part 2 of 2

	Overall top 20 association sub categories – *by target groups* *(in % of respondents)*	All respondents	Interested in city breaks	Interested in nature	Interested in culture	Interested in culinary	Interested in nature and cycling	Interested in relaxing
11	(much, beautiful) forest(s) / (green) meadows / (much) green / (many) green spaces	**2.4%**	3.7%	2.7%	2.5%	4.2%	4.7%	5.3%
11	(much, great) culture / cultural interesting / cultural heritage	**2.4%**	3.7%	3.0%	4.2%	2.7%	4.7%	3.6%
13	(much) snow	**2.1%**	3.4%	3.3%	3.3%	2.7%	1.3%	2.5%
14	(located in the) North / northern / nordic	**1.9%**	3.1%	3.0%	2.9%	2.4%	3.4%	2.1%
14	wide / wide plain / flat (country) / even	**1.9%**	2.2%	1.5%	2.5%	1.5%	2.7%	1.8%
16	(located in the) East	**1.8%**	1.9%	2.1%	2.9%	2.7%	1.3%	3.2%
16	culinary in general, e.g. (good, other, tasty) food, beer, cheese, gastronomy, salted fish, vodka	**1.8%**	1.2%	0.9%	0.8%	1.8%	1.3%	1.4%
16	different / extraordinary / exotic / fascinating / mysterious / inspiration / exciting / many new things	**1.8%**	2.8%	2.7%	1.3%	2.1%	2.7%	2.8%
16	far away / difficult to reach	**1.8%**	1.2%	1.8%	0.8%	0.9%	0.0%	1.1%
20	small country / small	**1.7%**	1.9%	1.8%	1.7%	2.1%	2.7%	1.8%

* Due to the multiple response option, no significance test for the differentiation by target groups can be carried out for methodological reasons.

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

Outline

6.2 Target group analysis by "9+1 types of holiday makers"

Overall top 20 association sub categories – *by "9+1 types of holiday makers"*

*> What springs spontaneously to your mind when thinking of the foreign tourist destination **Latvia**?*
> in % of respondents

■ ***Latvia***
Source market: Germany
Base: All respond. by "9+1 types of holiday makers"*
Number of respondents: 1,000
Top 20 sub categories – part 1 of 2

	DESTINATION BRAND 19 Overall top 20 association sub categories – *by target groups* *(in % of respondents)*	All respondents	Sports / Nature 1 (C3)	Sports / Nature 2** (C4)	Sports / Nature 3** (C2)	Culture 1** (C6)	Culture 2** (C10)
1	cold / coldness / ice / frost	**9.8%**	6.6%	4.9%	7.4%	5.7%	16.3%
2	(located at the) Baltic Sea (coast) / (at the) sea / (at, much) water	**8.2%**	5.7%	13.1%	5.9%	7.5%	7.5%
3	(belongs to the) Baltic States / Baltic / Estonia / Lithuania	**7.1%**	5.7%	3.3%	2.9%	5.7%	5.0%
3	(capital) Riga	**7.1%**	5.7%	8.2%	10.3%	7.5%	7.5%
5	(beautiful, great, diverse) landscape (surroundings, area) / (beautiful, much, pure) nature	**6.2%**	7.0%	6.6%	10.3%	1.9%	6.3%
6	general positive evaluation (e.g. (very) beautiful, cool, interesting, great, pretty, super, wonderful)	**3.9%**	5.7%	1.6%	8.8%	1.9%	1.3%
7	former Soviet Union / former UDSSR / former Eastern Block / Russian influenced / Soviet influenced	**3.5%**	1.8%	3.3%	1.5%	1.9%	3.8%
8	(nice, friendly, cordial) people / hospitable / friendliness / open-minded / sympathetic / warm-hearted / cosmopolitan	**3.4%**	5.3%	1.6%	4.4%	3.8%	2.5%
9	reindeer / moose	**3.3%**	1.8%	0.0%	5.9%	3.8%	6.3%
10	(close to, borders) Russia / (many) Russians	**2.5%**	2.2%	3.3%	2.9%	1.9%	1.3%

* Due to the multiple response option, no significance test for the differentiation by target groups can be carried out for methodological reasons.

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

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

6.2 Target group analysis by “9+1 types of holiday makers”

Overall top 20 association sub categories – *by “9+1 types of holiday makers”*

*> What springs spontaneously to your mind when thinking of the foreign tourist destination **Latvia**?*
> in % of respondents

■ ***Latvia***
Source market: Germany
Base: All respond. by “9+1 types of holiday makers”*
Number of respondents: 1,000
Top 20 sub categories – part 1 of 2

	Overall top 20 association sub categories – *by target groups (in % of respondents)*	All respondents	Culture 3 (C1)	Beach / Relaxation** (C5)	Multi-Experience 1** (C8)	Multi-Experience 2** (C9)	General Disinterest (C7)
1	cold / coldness / ice / frost	**9.8%**	11.7%	18.1%	17.6%	14.6%	4.3%
2	(located at the) Baltic Sea (coast) / (at the) sea / (at, much) water	**8.2%**	9.7%	6.9%	5.9%	18.3%	7.0%
3	(belongs to the) Baltic States / Baltic / Estonia / Lithuania	**7.1%**	10.7%	5.6%	10.3%	20.7%	4.3%
3	(capital) Riga	**7.1%**	8.7%	6.9%	10.3%	9.8%	3.8%
5	(beautiful, great, diverse) landscape (surroundings, area) / (beautiful, much, pure) nature	**6.2%**	3.9%	8.3%	8.8%	12.2%	1.6%
6	general positive evaluation (e.g. (very) beautiful, cool, interesting, great, pretty, super, wonderful)	**3.9%**	2.9%	2.8%	4.4%	4.9%	2.7%
7	former Soviet Union / former UDSSR / former Eastern Block / Russian influenced / Soviet influenced	**3.5%**	4.9%	5.6%	4.4%	4.9%	3.2%
8	(nice, friendly, cordial) people / hospitable / friendliness / open-minded / sympathetic / warm-hearted / cosmopolitan	**3.4%**	5.8%	0.0%	4.4%	3.7%	1.1%
9	reindeer / moose	**3.3%**	3.9%	5.6%	1.5%	2.4%	3.2%
10	(close to, borders) Russia / (many) Russians	**2.5%**	1.0%	1.4%	1.5%	4.9%	3.8%

* Due to the multiple response option, no significance test for the differentiation by target groups can be carried out for methodological reasons.

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

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

6.2 Target group analysis by “9+1 types of holiday makers”

Overall top 20 association sub categories – *by “9+1 types of holiday makers”*

*> What springs spontaneously to your mind when thinking of the foreign tourist destination **Latvia**?*
> in % of respondents

■ ***Latvia***
Source market: Germany
Base: All respond. by “9+1 types of holiday makers”*
Number of respondents: 1,000
Top 20 sub categories – part 2 of 2

	Overall top 20 association sub categories – *by target groups* (in % of respondents)	All respondents	Sports / Nature 1 (C3)	Sports / Nature 2** (C4)	Sports / Nature 3** (C2)	Culture 1** (C6)	Culture 2** (C10)
11	(much, beautiful) forest(s) / (green) meadows / (much) green / (many) green spaces	**2.4%**	2.6%	3.3%	1.5%	3.8%	1.3%
11	(much, great) culture / cultural interesting / cultural heritage	**2.4%**	3.1%	3.3%	0.0%	1.9%	1.3%
13	(much) snow	**2.1%**	0.9%	0.0%	2.9%	0.0%	5.0%
14	(located in the) North / northern / nordic	**1.9%**	0.9%	0.0%	1.5%	1.9%	1.3%
14	wide / wide plain / flat (country) / even	**1.9%**	0.9%	3.3%	0.0%	3.8%	2.5%
16	(located in the) East	**1.8%**	0.9%	0.0%	1.5%	0.0%	1.3%
16	culinary in general, e.g. (good, other, tasty) food, beer, cheese, gastronomy, salted fish, vodka	**1.8%**	2.2%	0.0%	2.9%	3.8%	1.3%
16	different / extraordinary / exotic / fascinating / mysterious / inspiration / exciting / many new things	**1.8%**	2.6%	0.0%	5.9%	1.9%	1.3%
16	far away / difficult to reach	**1.8%**	0.4%	1.6%	4.4%	0.0%	1.3%
20	small country / small	**1.7%**	1.8%	1.6%	1.5%	0.0%	0.0%

* Due to the multiple response option, no significance test for the differentiation by target groups can be carried out for methodological reasons.

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

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

6.2 Target group analysis by “9+1 types of holiday makers”

Overall top 20 association sub categories – *by “9+1 types of holiday makers”*

*> What springs spontaneously to your mind when thinking of the foreign tourist destination **Latvia**?*
> in % of respondents

■ ***Latvia***
Source market: Germany
Base: All respond. by “9+1 types of holiday makers”*
Number of respondents: 1,000
Top 20 sub categories – part 2 of 2

	Overall top 20 association sub categories – *by target groups* *(in % of respondents)*	**All respondents**	**Culture 3** (C1)	**Beach / Relaxation**** (C5)	**Multi-Experience 1**** (C8)	**Multi-Experience 2**** (C9)	**General Disinterest** (C7)
11	(much, beautiful) forest(s) / (green) meadows / (much) green / (many) green spaces	**2.4%**	2.9%	1.4%	2.9%	3.7%	1.1%
11	(much, great) culture / cultural interesting / cultural heritage	**2.4%**	5.8%	1.4%	4.4%	1.2%	0.5%
13	(much) snow	**2.1%**	3.9%	2.8%	2.9%	2.4%	1.1%
14	(located in the) North / northern / nordic	**1.9%**	1.9%	4.2%	4.4%	4.9%	1.1%
14	wide / wide plain / flat (country) / even	**1.9%**	2.9%	1.4%	4.4%	3.7%	0.0%
16	(located in the) East	**1.8%**	1.9%	2.8%	2.9%	7.3%	0.5%
16	culinary in general, e.g. (good, other, tasty) food, beer, cheese, gastronomy, salted fish, vodka	**1.8%**	1.9%	1.4%	2.9%	0.0%	2.2%
16	different / extraordinary / exotic / fascinating / mysterious / inspiration / exciting / many new things	**1.8%**	2.9%	0.0%	4.4%	0.0%	0.5%
16	far away / difficult to reach	**1.8%**	2.9%	0.0%	1.5%	2.4%	2.7%
20	small country / small	**1.7%**	0.0%	4.2%	1.5%	4.9%	1.6%

* Due to the multiple response option, no significance test for the differentiation by target groups can be carried out for methodological reasons.

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

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

Outline

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

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

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

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

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

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

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

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7.2 Institute for Management and Tourism (IMT) of the FH Westküste

Practical relevance as a guideline

The Institute for Management and Tourism (IMT) was founded in 2006 as an internal institute of the FH Westküste (University of Applied Sciences) and is one of the leading research institutes in the field of tourism in Germany. Research and knowledge transfer are central tasks at the FH Westküste. The IMT sees itself as a link between research and its practical implementation.

Based on scientific knowledge and in view of industry needs, the IMT has successfully worked on more than 100 tourism projects – many of them in cooperation with industry partners. Together with these partners – e.g., Destination Management Organisations (DMOs), hotel co-operations, carriers and other universities – the IMT operates on a national and international level.

Furthermore, being part of a higher education institution, the institute works independent of mandated projects in the field of economically oriented tourism research. Thus, new expertise is being developed continuously. With the experience of its interdisciplinary team the IMT takes up topical issues and methods creating innovations and added value both for science and industry.

Moreover, part of the central task of knowledge transfer is further training. As a result, the IMT was engaged in several activities in this field during the last years as well. Under the leadership of the director Prof. Dr. Bernd Eisenstein the IMT consists of an interdisciplinary team with both permanent as well as project-related employed members.

► **www.imt-fhw.de**

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Fritz-Thiedemann-Ring 20
25746 Heide (Holstein)

7.3 Ipsos Operations GmbH

Ipsos is the number 3 worldwide in the market research sector. With a strong presence in 89 countries, Ipsos employs more than 17,000 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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Outline

8.1 Reading examples

2.2 Overview of the association superior categories

Overview of the association superior categories

*> What springs spontaneously to your mind when thinking of the foreign **tourist destination xy**?*

Destination xy
Source market: Germany
Base: All respondents
Number of respondents: 1,000
Superior categories

	DESTINATION BRAND 19 Association superior categories 2	% of respondents	% of responses	Number of individual responses
1	sights / attractions / events	35.4%	23.2%	354
2	places, cities and regions in and around the destination xy incl. attributes	27.8%	18.3%	278
3	holiday and leisure activities	21.2%	13.9%	212
4	mountain landscape / nature in general	17.3%	11.4%	173
5	general geographical location	15.6%	10.2%	156
6	general positive assessment / well-being	10.9%	7.2%	109
7	negative associations to the destination xy	4.9%	3.2%	49
8	personal relation	2.1%	1.4%	21
	further associations to the destination xy without category allocation	3.9%	2.6%	39
	no substantive associations (unknown / only know by name – nothing / don't know – no idea / can't think of anything – never been there before – invalid answer)	13.2%	8.7%	132
	sum of individual responses encompassing all categories	**152.3%***	**100.0%***	**1,523***

1

3

* Due to the multiple response option, the sum of the individual responses (1,523) is higher than the total number of respondents (1,000).

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

1

For each superior category, 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 (1,523) is greater than the number of respondents (1,000).

2

In this example, the given responses were classified into eight different superior categories as well as a supplementary group of further associations to destination xy without category allocation.

Key question: Which of the superior categories formed is most strongly associated with destination xy?
– Reading example: ***Superior category 4 "mountain landscape / nature in general" (Base: all respondents)***

3

- ▶ The cluster "mountain landscape / nature in general" is the fourth strongest superior category of the destination.
- ▶ This category accounts for 173 of the total number of entries submitted. This corresponds to 17.3% of the 1,000 respondents respectively 11.4% of the 1,523 spontaneous associations.

8.1 Reading examples

5.4 Spontaneous associations – *Cat. 4 "mountain landscape / nature in general"*

Spontaneous associations in category 4:
"mountain landscape / nature in general"
*> What springs spontaneously to your mind when thinking of the foreign **tourist destination xy**?*

■ ***Destination xy***
Source market: Germany
Base: All respondents
Number of respondents: 1,000
Associations in category 4

	DESTINATION BRAND 19 — **Spontaneous associations in category 4:** ***"mountain landscape / nature in general"*** 2	% of respondents	% of responses 1	Number of individual responses
1	(many, high) mountains / mountainous / (medium) mountain ranges / peaks 4	6.2%	4.1%	62
2	(beautiful, great) landscape (surroundings, area) / (beautiful, much, pure) nature	3.4%	2.2%	34
3	rural (region)	2.5%	1.6%	25
4	(much) forest / (many, beautiful, varied) forests	2.1%	1.4%	21
5	3 lakes / some lakes for swimming and fishing	1.4%	0.9%	14
6	(relaxed) space / wide countryside / (beautiful) views	1.0%	0.7%	10
	further associations to the category 4 "landscape / nature"* (e.g. agriculture, (wild) animals, farms, nature conservation (area))	0.7%	0.5%	7
	sum of individual responses belonging to category 4	**17.3%**	**11.4%**	**173**

* Sum of further associations belonging to the category with less than 5 individual responses each.

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

1

For each sub category, 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 (1,523) is greater than the number of respondents (1,000).

2

In order to additionally enable a detailed analysis of the spontaneous associations, the corresponding sub categories are listed for each superior category.

3

As the number of responses per association category decreases (≤ 20 individual responses), the relevance of these is significantly reduced (therefore written in grey in the overview tables).

Key question: Which sub categories are most frequently associated with destination xy in the case of the superior category 4 "mountain landscape / nature in general"? – Reading example: ***"(many, high) mountains / mountainous / (medium) mountain ranges / peaks"*** ***(Base: all respondents)***

4

- ▶ In superior category 4 "mountain landscape / nature in general", "(many, high) mountains / mountainous / (medium) mountain ranges / peaks" forms the top sub category with a total of 62 individual responses.
- ▶ This corresponds to 6.2% of the 1,000 respondents and 4.1% of the 1,523 spontaneous associations to destination xy.

8.1 Reading examples

6.1 Standard target group analysis

Overall top 20 association sub categories – *by target groups*

*> What springs spontaneously to your mind when thinking of the foreign **tourist destination xy**?*
> in % of respondents

Destination xy
Source market: Germany
Base: All respondents by individual target groups*
Number of respondents: 1,000
Top 20 sub categories – part 1 of 2

	DESTINATION BRAND 19 **Overall top 20 association sub categories – *by target groups*** *(in % of respondents)* 2	All respondents	Families with children	Interested in hiking	Best agers interested in culture
1	castles / palaces	**14.3%**	11.2%	15.3%	19.7%
2	(excellent for) hiking / (great) hiking trails	**12.2%**	13.4%	21.7%	11.6%
3	(beautiful, attractive, charming) places / (typical regional) architecture	**10.3%**	8.7%	7.9%	12.3%
4	(many, high) mountains / mountainous / (medium) mountain ranges / peaks	**6.2%**	6.1%	8.3%	6.9%
5	(traditional) craftsmanship	**5.7%**	5.3%	4.7%	7.3%
6	(good, tasty, hearty) food / (good, regional) cuisine	**4.8%**	4.2%	3.9%	6.2%
7	(beautiful, great) landscape (surroundings, area) / (beautiful, much, pure) nature	**3.4%**	3.9%	5.5%	3.1%
8	(nice, friendly, warm-hearted) people / hospitality	**3.3%**	5.1%	4.3%	3.8%
9	rural (area)	**2.5%**	3.1%	4.2%	2.7%
10	mountaineering / climbing / climbing forest	**2.1%**	1.9%	4.9%	1.5%

1 4

* Due to the multiple response option, no significance test for the differentiation by target groups can be carried out for methodological reasons. 3

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

1

In addition to the univariate evaluation results, other bivariate evaluations are also part of the individual report. Among others, the top 20 association sub categories are differentiated by individually selected target groups.

2

For each target group, the percentages are based on the total number of respondents.

3

Due to the multiple response option, no significance test for the differentiation by target groups can be carried out for method-logical reasons.

Key question: With regard to which spontaneous association sub categories can target group-specific particularities be identified?
– Reading example: ***"(excellent for) hiking / (great) hiking trails"***

4

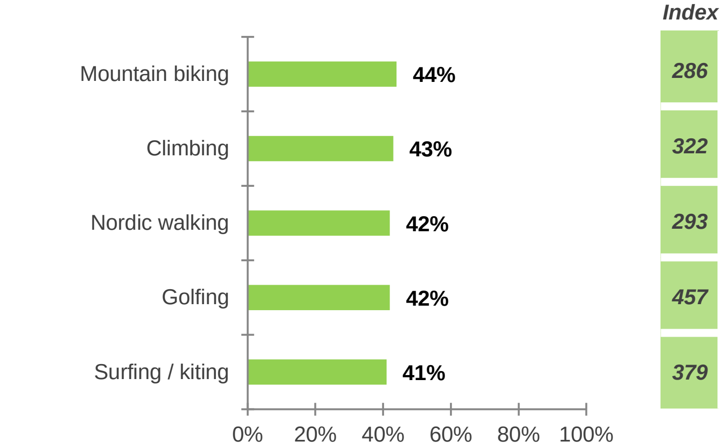
- ▶ The example shows the target groups "families with children", "interested in hiking" and "best agers interested in hiking".
- ▶ Among the target groups presented, the sub category "(excellent for) hiking / (great) hiking trails" is most frequently associated with destination xy by the target group "interested in hiking" (21.7%). Compared to the total of respondents (12.2%), the percentage of this association sub category among the target group "interested in hiking" is clearly above average.

Outline

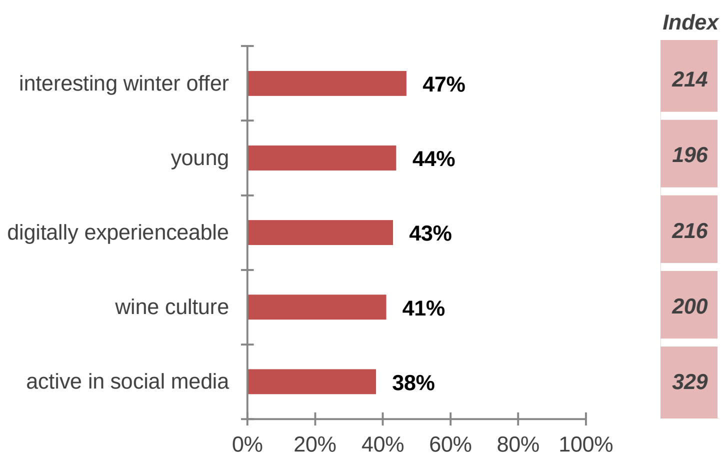
8.2 Fact sheets about the “9+1 types of holiday makers” – *Cluster “Sports / Nature 1” (C3)*

Cluster “Sports / Nature 1” (C3) …

… has among others an above-average general interest in the following holiday themes:



… ascribes among others an above-average general relevance for the choice of destination to the following characteristics:



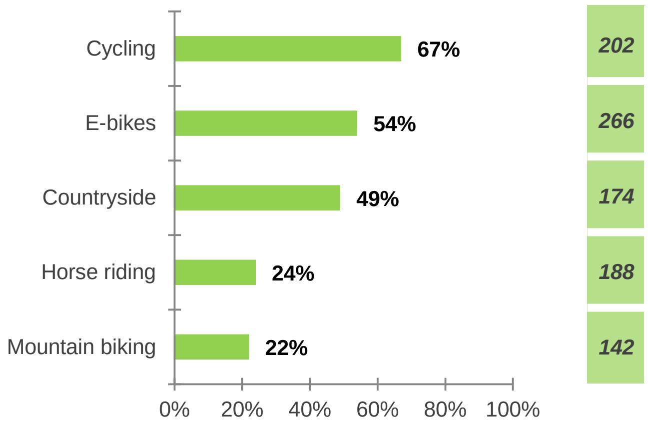
Sociodemographic criteria		Cluster “Sports / Nature 1” (C3)
	Sex	Male respondents (I = 122) overrepresented
	Age	14-24 year olds (I = 182) and 25-34 year olds (I = 196) both significantly overrepresented
	Formal education	No particular variations
	Children under the age of 14	Households with children <14 years (I = 157) significantly overrepresented
	Household size	Households with 3 p. (I = 120) and with 4+ p. (I = 149) both overrepresented
	Net household income	No particular variations
	Town size	Respondents from cities with 20,000 to <100,000 inh. (I = 112) and 100,000 to <500,000 inh. (I = 112) both slightly overrepresented
	Regional origin	Respondents from Nielsen area 6 (I = 114) slightly overrepresented
	Occupation	Employees with managerial function (I = 162), skilled workers (I = 161) and pupils / students / apprentices / volunteers (I = 151) all significantly overrepresented

Source: Institute for Management and Tourism (IMT) and inspektour GmbH, 2016 / 2017

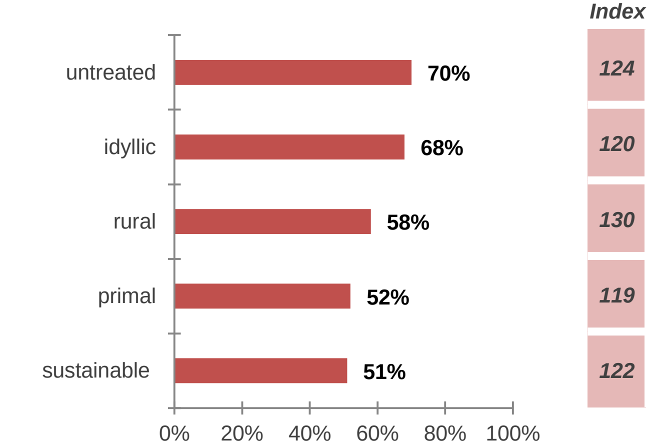
8.2 Fact sheets about the "9+1 types of holiday makers" – *Cluster "Sports / Nature 2" (C4)*

Cluster "Sports / Nature 2" (C4) …

… has among others an above-average general interest in the following holiday themes:



… ascribes among others an above-average general relevance for the choice of destination to the following characteristics:



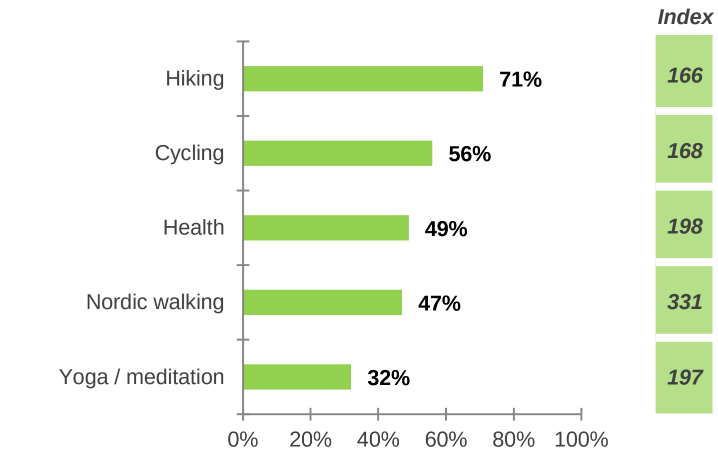
Sociodemographic criteria		Cluster "Sports / Nature 2" (C4)
	Sex	No particular variations
	Age	35-44 year olds (I = 113), 45-54 year olds (I = 115) and 55-64 year olds (I = 112) all slightly overrepresented
	Formal education	Respondents with lower secondary education (I = 117) and middle secondary education (I = 114) both slightly overrepresented
	Children under the age of 14	Households with children <14 years (I = 115) slightly overrepresented
	Household size	No particular variations
	Net household income	No particular variations
	Town size	No particular variations
	Regional origin	Respondents from Nielsen area 2 (I = 112) and Nielsen area 1 (I = 110) both slightly overrepresented
	Occupation	Employees without managerial function (I = 110), skilled workers (I = 122) and retirees / unemployed (I = 115) all (slightly) overrepresented

Source: Institute for Management and Tourism (IMT) and inspektour GmbH, 2016 / 2017

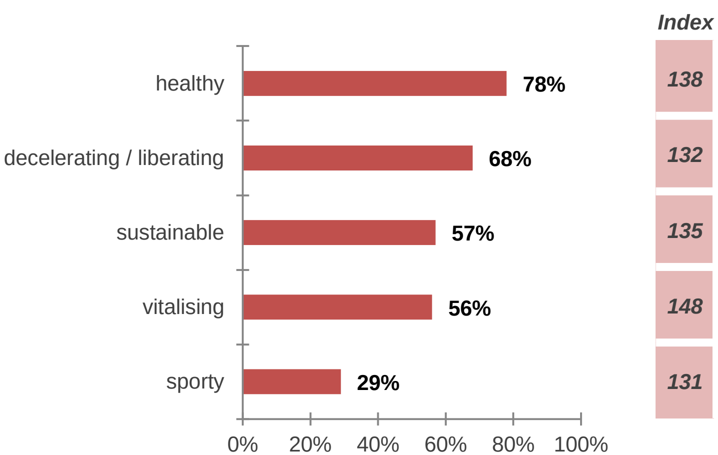
8.2 Fact sheets about the “9+1 types of holiday makers” – *Cluster “Sports / Nature 3” (C2)*

Cluster “Sports / Nature 3” (C2) …

… has among others an above-average general interest in the following holiday themes:



… ascribes among others an above-average general relevance for the choice of destination to the following characteristics:



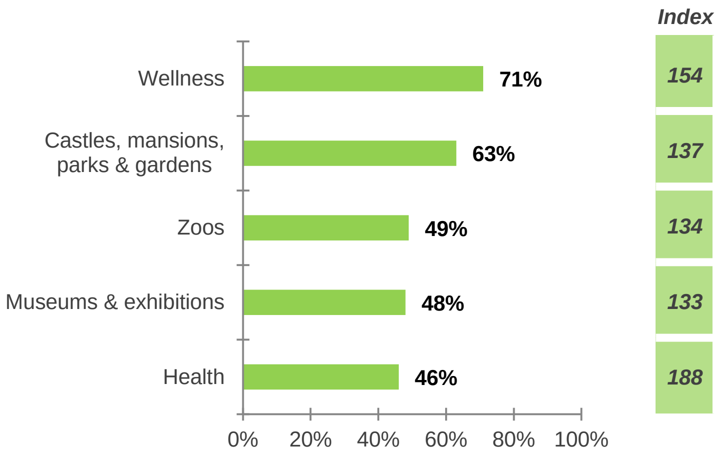
Sociodemographic criteria		Cluster “Sports / Nature 3” (C2)
	Sex	Female respondents (I = 127) overrepresented
	Age	45-54 year olds (I = 113), 55-64 year olds (I = 169) and 65-74 year olds (I = 164) all (slightly to significantly) overrepresented
	Formal education	Respondents with middle secondary education (I = 124) overrepresented
	Children under the age of 14	Households without children <14 years (I = 110) slightly overrepresented
	Household size	Households with 2 p. (I = 127) overrepresented
	Net household income	3,000 to <3,500 € (I = 114) and 3,500 to <4,000 € (I = 127) both (slightly) overrepresented
	Town size	Respondents from cities with <20,000 inh. (I = 115) slightly overrepresented
	Regional origin	No particular variations
	Occupation	Civil servants (I = 129) and retirees / unemployed (I = 136) both overrepresented

Source: Institute for Management and Tourism (IMT) and inspektour GmbH, 2016 / 2017

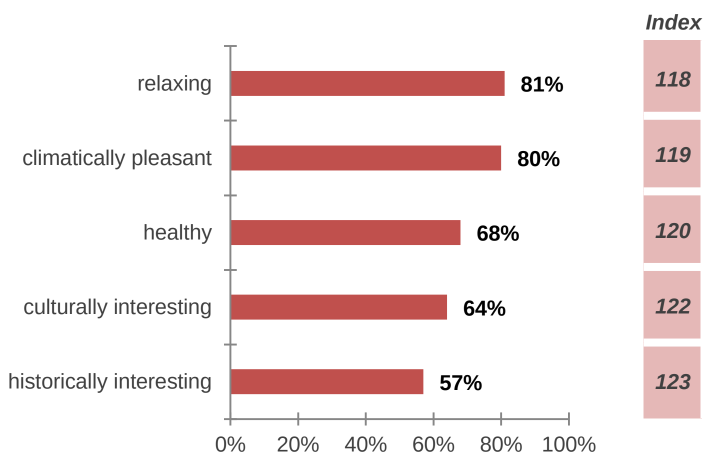
8.2 Fact sheets about the "9+1 types of holiday makers" – *Cluster "Culture 1" (C6)*

Cluster "Culture 1" (C6) …

… has among others an above-average general interest in the following holiday themes:



… ascribes among others an above-average general relevance for the choice of destination to the following characteristics:



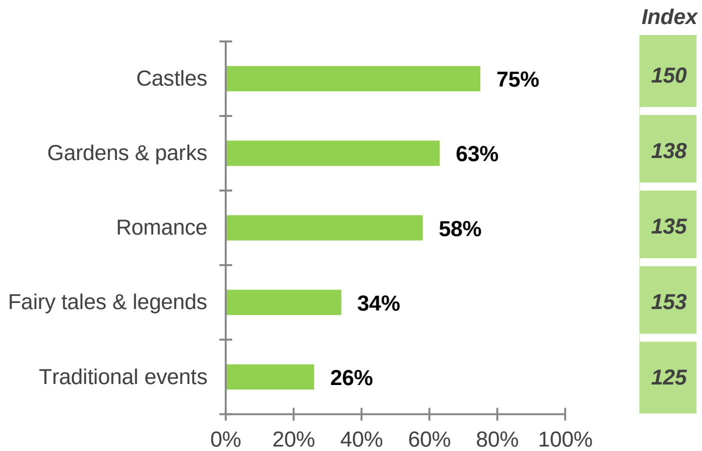
Sociodemographic criteria		Cluster "Culture 1" (C6)
	Sex	Female respondents (I = 133) overrepresented
	Age	55-64 year olds (I = 149) and 65-74 year olds (I = 171) both (significantly) overrepresented
	Formal education	Respondents with middle secondary education(I = 111) slightly overrepresented
	Children under the age of 14	Households without children <14 years (I = 114) slightly overrepresented
	Household size	Households with 1 p. (I = 145) and with 2 p. (I = 114) both (slightly) overrepresented
	Net household income	1,000 to <1,500 € (I = 113) and 1,500 to <2,000 € (I = 126) both (slightly) overrepresented
	Town size	Respondents from cities over 500,000 inh. (I = 111) slightly overrepresented
	Regional origin	Respondents from Nielsen area 5 (I = 144) overrepresented
	Occupation	Self-employed (I = 120), retirees / unemployed (I = 161) and housewives / househusbands (I = 112) all (slightly to significantly) overrepresented

Source: Institute for Management and Tourism (IMT) and inspektour GmbH, 2016 / 2017

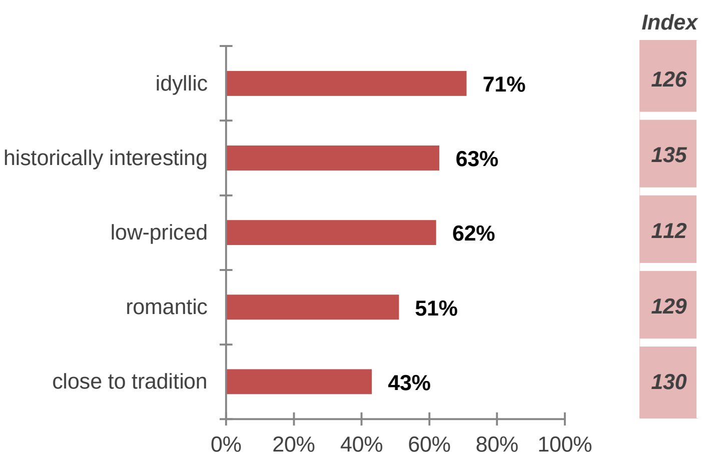
8.2 Fact sheets about the “9+1 types of holiday makers” – *Cluster “Culture 2” (C10)*

Cluster “Culture 2” (C10) …

… has among others an above-average general interest in the following holiday themes:



… ascribes among others an above-average general relevance for the choice of destination to the following characteristics:



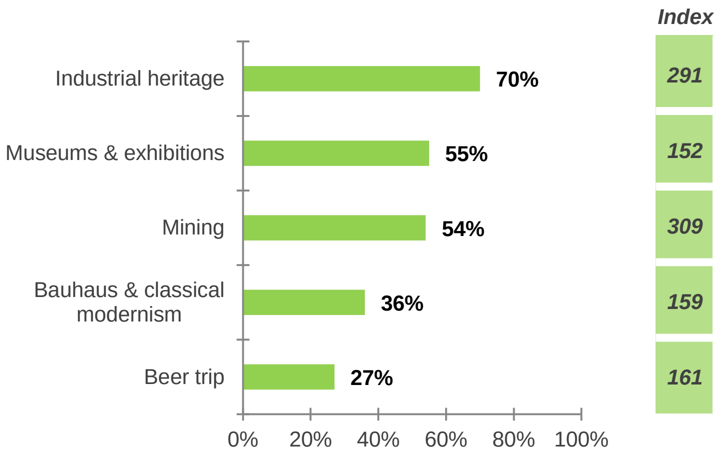
Sociodemographic criteria		Cluster “Culture 2” (C10)
	Sex	Female respondents (I = 122) overrepresented
	Age	55-64 year olds (I = 110) and 65-74 year olds (I = 149) both (slightly) overrepresented
	Formal education	Respondents with lower secondary education (I = 126) and middle secondary education (I = 114) both (slightly) overrepresented
	Children under the age of 14	No particular variations
	Household size	Households with 2 p. (I = 116) slightly overrepresented
	Net household income	<1,000 € (I = 117), 1,000 € to <1,500 € (I = 125), 1,500 € to <2,000 € (I = 113), 2,000 € to <2,500 € (I = 116) and 2,500 € to <3,000 € (I = 114) all (slightly) overrepresented
	Town size	Respondents from cities with <20,000 inh. (I = 110) slightly overrepresented
	Regional origin	Respondents from Nielsen area 6 (I = 125), Nielsen area 7 (I = 117) and Nielsen area 3a (I = 112) all (slightly) overrepresented
	Occupation	Housewives / househusbands (I = 156) and retirees / unemployed (I = 138) both (significantly) overrepresented

Source: Institute for Management and Tourism (IMT) and inspektour GmbH, 2016 / 2017

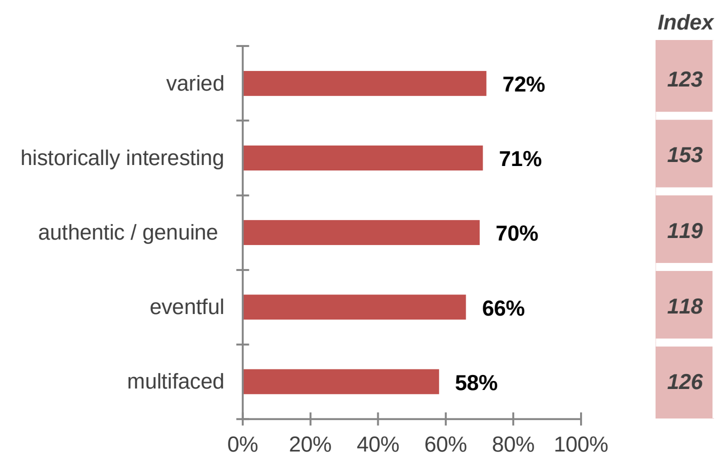
8.2 Fact sheets about the "9+1 types of holiday makers" – *Cluster "Culture 3" (C1)*

Cluster "Culture 3" (C1) …

… has among others an above-average general interest in the following holiday themes:



… ascribes among others an above-average general relevance for the choice of destination to the following characteristics:



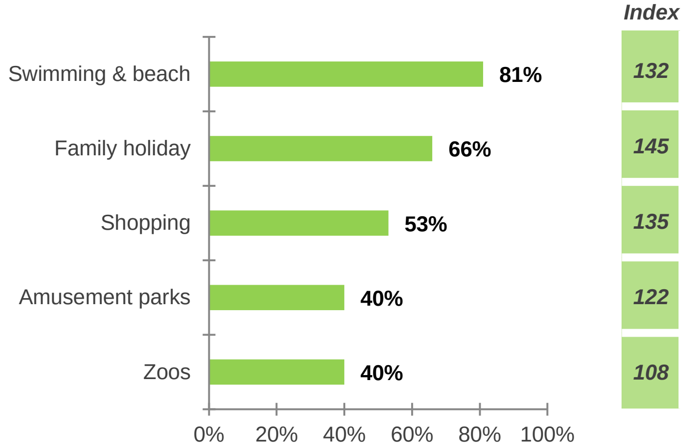
Sociodemographic criteria		Cluster "Culture 3" (C1)
	Sex	Male respondents (I = 128) overrepresented
	Age	45-54 year olds (I = 134), 55-64 year olds (I = 119) and 65-74 year olds (I = 111) all (slightly) overrepresented
	Formal education	Respondents with tertiary education (I = 114) slightly overrepresented
	Children under the age of 14	No particular variations
	Household size	No particular variations
	Net household income	3,500 to <4,000 € (I = 110) and over 4,000 € (I = 113) both slightly overrepresented
	Town size	Respondents from cities with 100,000 to <500,000 inh. (I = 110) slightly overrepresented
	Regional origin	Respondents from Nielsen area 2 (I = 118), and Nielsen area 7 (I = 114) both slightly overrepresented
	Occupation	Self-employed (I = 118), employees with managerial functions (I = 112) and retirees / unemployed (I = 111) all slightly overrepresented

Source: Institute for Management and Tourism (IMT) and inspektour GmbH, 2016 / 2017

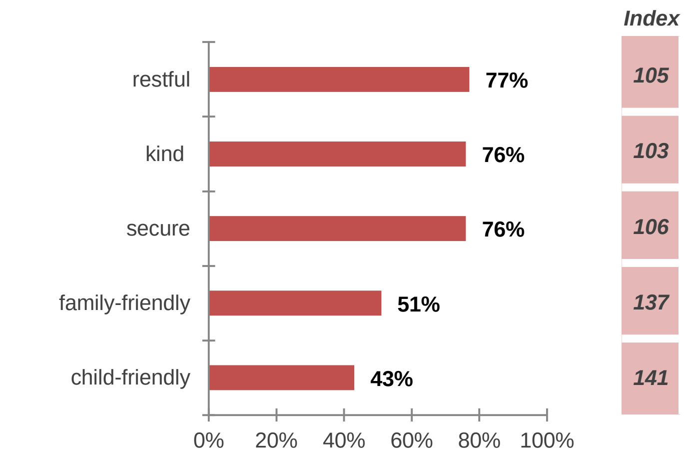
8.2 Fact sheets about the "9+1 types of holiday makers" – *Cluster "Beach / Recreation" (C5)*

Cluster "Beach / Recreation" (C5) …

… has among others an above-average general interest in the following holiday themes:



… ascribes among others an above-average general relevance for the choice of destination to the following characteristics:



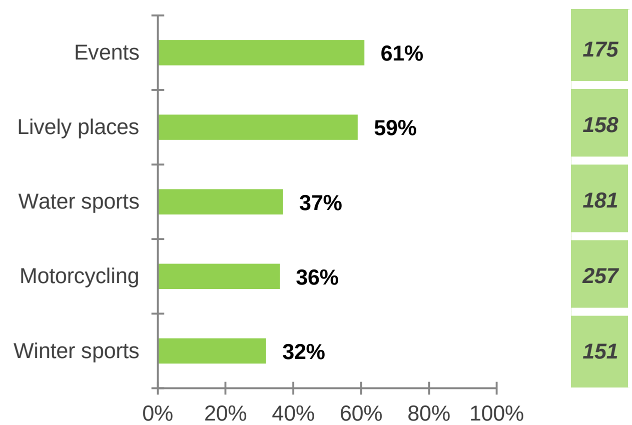
Sociodemographic criteria		Cluster "Beach / Recreation" (C5)
	Sex	No particular variations
	Age	14-24 year olds (I = 111), 25-34 year olds (I = 114) and 35-44 year olds (I = 150) all (slightly to significantly) overrepresented
	Formal education	No particular variations
	Children under the age of 14	Households with children <14 years (I = 201) highly significantly overrepresented
	Household size	Households with 3 p. (I = 132) and with 4+ p. (I = 170) both (significantly) overrepresented
	Net household income	3,000 to <3,500 € (I = 113), 3,500 to <4,000 € (I = 115) and over 4,000 € (I = 113) all slightly overrepresented
	Town size	No particular variations
	Regional origin	Respondents from Nielsen area 4 (I = 116) slightly overrepresented
	Occupation	Employees without managerial function (I = 119), civil servants (I = 115) and housewives / househusbands (I = 132) all (slightly) overrepresented

Source: Institute for Management and Tourism (IMT) and inspektour GmbH, 2016 / 2017

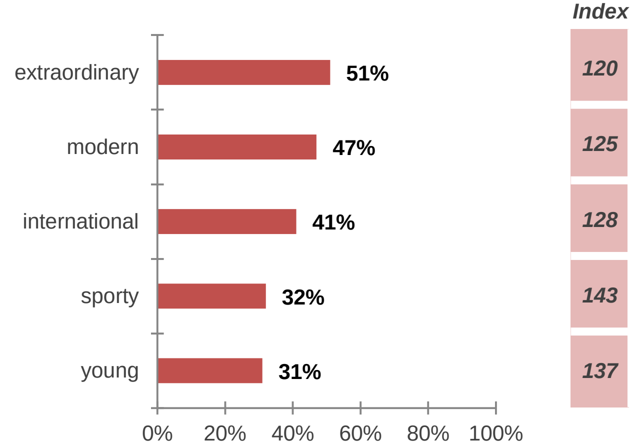
8.2 Fact sheets about the "9+1 types of holiday makers" – *Cluster "Multi-Experience 1" (C8)*

Cluster "Multi-Experience 1" (C8) …

… has among others an above-average general interest in the following holiday themes:



… ascribes among others an above-average general relevance for the choice of destination to the following characteristics:



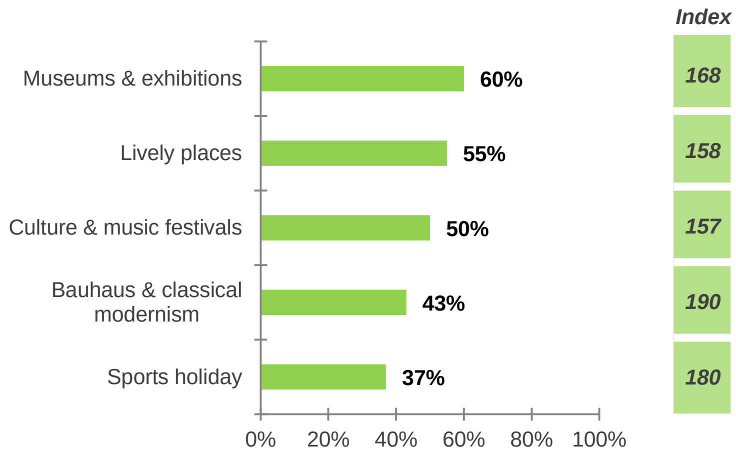
Sociodemographic criteria		Cluster "Multi-Experience 1" (C8)
	Sex	Male respondents (I = 119) slightly overrepresented
	Age	14-24 year olds (I = 248) and 25-34 year olds (I = 133) (highly significantly) overrepresented
	Formal education	Respondents with higher secondary education (I = 143) overrepresented
	Children under the age of 14	No particular variations
	Household size	Households with 3 p. (I = 121) and with 4+ p. (I = 126) both overrepresented
	Net household income	3,000 to <3,500 € (I = 115) and over 4,000 € (I = 111) both slightly overrepresented
	Town size	Respondents from cities with <20,000 inh. (I = 111) slightly overrepresented
	Regional origin	Respondents from Nielsen area 4 (I = 111) slightly overrepresented
	Occupation	Pupils / students / apprentices / volunteers (I = 240) highly significantly overrepresented

Source: Institute for Management and Tourism (IMT) and inspektour GmbH, 2016 / 2017

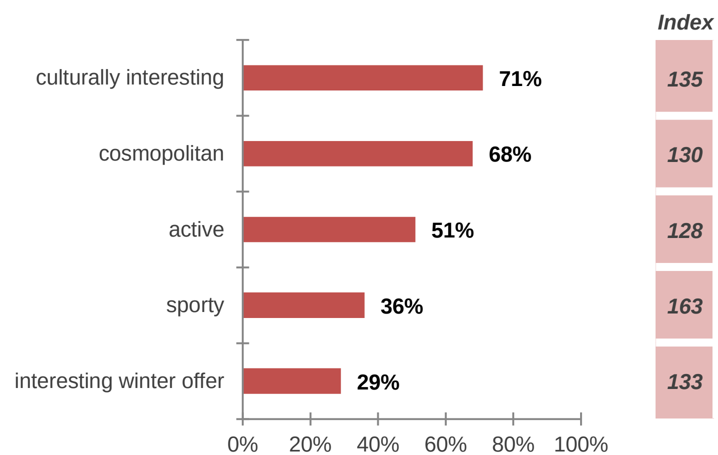
8.2 Fact sheets about the “9+1 types of holiday makers” – *Cluster “Multi-Experience 2” (C9)*

Cluster “Multi-Experience 2” (C9) …

… has among others an above-average general interest in the following holiday themes:



… ascribes among others an above-average general relevance for the choice of destination to the following characteristics:



Sociodemographic criteria		Cluster “Multi-Experience 2” (C9)
	Sex	No particular variations
	Age	14-24 year olds (I = 135) and 25-34 year olds (I = 121) both overrepresented
	Formal education	Respondents with higher secondary education (I = 113) and tertiary education (I = 173) both (slightly to significantly) overrepresented
	Children under the age of 14	No particular variations
	Household size	No particular variations
	Net household income	Over 4,000 € (I = 148) overrepresented
	Town size	Respondents from cities with 100,000 to <500,000 inh. (I = 110) and over 500,000 inh. (I = 149) both (slightly) overrepresented
	Regional origin	Respondents from Nielsen area 4 (I = 118) and Nielsen area 5 (I = 134) both (slightly) overrepresented
	Occupation	Pupils / students / apprentices / volunteers (I = 182), self-employed (I = 163), civil servants (I = 114) and employees with managerial function (I = 113) all (slightly to significantly) overrepresented

Source: Institute for Management and Tourism (IMT) and inspektour GmbH, 2016 / 2017

8.2 Fact sheets about the "9+1 types of holiday makers" – *Cluster "General Disinterest" (C7)*

Cluster "General Disinterest" (C7) …

… has an above average general interest in <u>no</u> holiday themes!

… does <u>not</u> ascribe an above-average general relevance to any characteristics for the choice of destination!

Sociodemographic criteria		Cluster "General Disinterest" (C7)
	Sex	Male respondents (I = 113) slightly overrepresented
	Age	55-64 year olds (I = 110) and 65-74 year olds (I = 128) both (slightly) overrepresented
	Formal education	Respondents with lower secondary education (I = 167) significantly overrepresented
	Children under the age of 14	No particular variations
	Household size	Households with 1 p. (I = 126) overrepresented
	Net household income	<1,000 € (I = 160), 1,000 to <1,500 € (I = 137) and 1,500 to <2,000 € (I = 122) all (significantly) overrepresented
	Town size	No particular variations
	Regional origin	No particular variations
	Occupation	Retirees / unemployed (I = 140), housewives / househusbands (I = 133) and skilled workers (I = 126) all overrepresented

Source: Institute for Management and Tourism (IMT) and inspektour GmbH, 2016 / 2017

Outline

8.3 Glossary

Content of the profile study	
Spontaneous associations	Proportion of the represented population that spontaneously (i.e., without being provided answer options) associates certain ideas, attributes respectively characteristics with the tourist destination
Sub-groups	
Brand connoisseurs	Respondents who know the tourist destination (when it is provided as an answer option), even if it is only by name
Visitors in the past	Respondents who have already holidayed in the tourist destination (with at least one overnight stay)
Distinct intention to travel abroad	Respondents who definitely (top value) intend to spend a short holiday trip (with 1 – 3 overnight stays) and / or a longer holiday trip (with 4 or more overnight stays) abroad within the next 3 years
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.
Share value per category	Proportion of the respective variable that is attributable to a response category, percentage

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

8.3 Glossary

Methods	
Representativeness	Is used to indicate that a sample reflects all (essential) characteristics of a population and thus mirrors the total population. In a stricter sense, a sample is representative if all the individuals in the population had the same possibility of becoming part of that sample.
Population	A population is a finite set of statistical units that are of interest for primary research. As it is often not possible to survey the total population, a sample is usually selected (partial survey) to determine the opinion of the population. In case of small populations, a complete survey among all individuals belonging to the population might be possible.
Sample	A sample is a selection of people or objects that provides representative information on behalf of a population. The responses given by the sample can be applied for the entire population.
Quota sample	The quota sample is a systematic selection procedure. In the case of quota samples, the selection of the representative sample to be surveyed is not left to chance, but the selection is made on the basis of so-called control variables. Control variables are usually demographic data such as gender, age, income, level of education, etc. The knowledge of the composition of a population with regard to these control variables is usually based on other statistical surveys, such as official statistics. The selection of statistical units that hold the defined control variables (i.e., survey respondents), is not random, but is determined by a responsible party.
Confidence level / probability	The confidence level indicates the probability that the value of a statistical parameter (for example, a mean) from a sample survey is appropriate for the population. Confidence levels must be set for a survey – they form the basis not only for the error tolerance but also for the necessary size of a sample. Surveys in the social sciences frequently use confidence levels of 90, 95 or 99 percent. If the confidence level is 95 percent, this means that a statistically determined value from the sample survey is 95 percent likely to be within the calculated confidence interval for the population as well.

Source: inspektour (international) GmbH / IMT of the FH Westküste, 2019 based on Statista GmbH, 2013

Outline

8.4 Margin of error

Confidence probability **95%**

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

Sample size	Confidence interval limits	
1,000	lower	higher
Variances		
1.35	3.65	6.35
1.86	8.14	11.86
2.21	12.79	17.21
2.48	17.52	22.48
2.68	22.32	27.68
2.84	27.16	32.84
2.96	32.04	37.96
3.04	36.96	43.04
3.08	41.92	48.08
3.10	46.90	53.10
3.08	51.92	58.08
3.04	56.96	63.04
2.96	62.04	67.96
2.84	67.16	72.84
2.68	72.32	77.68
2.48	77.52	82.48
2.21	82.79	87.21
1.86	88.14	91.86
1.35	93.65	96.35
2.48	17.52	22.48
17.52		
22.48		

Source: GfK, 2013

8.4 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 spontaneous associations to the tourist destination "Latvia" in the source market Germany 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.

Source: inspektour (international) GmbH / IMT of the FH Westküste, 2019 based on GfK, 2013

Outline

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

The given overview in chapter 3.1 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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Outline

8.6 List of literature regarding the brief introduction to the "9+1 types of holiday makers"

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Outline

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