DESTINATION BRAND 19 + 23

SPONTANEOUS ASSOCIATIONS TO TOURIST DESTINATIONS +

TOURIST DESTINATIONS AS TOURISM AND LIVING SPACES

SOURCE MARKET **CHINA**

Additional evaluations for the tourist destination Spain (西班牙)

► **Note:** Queried designation of Spain for Chinese respondents = “西班牙”

Total of 1,000 respondents I population representative study

Customer-oriented study I evaluation of selected tourist destinations

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TOURISM AND MARKET RESEARCH

DESTINATION BRAND 23

TOURIST DESTINATIONS AS TOURISM AND LIVING SPACES

SOURCE MARKET **CHINA**

Extract for the tourist destination Spain (西班牙)

► **Note:** Queried designation of Spain for Chinese respondents = “西班牙”

Customer-oriented study on tourism and living spaces I total of 1,000 respondents I population representative study

Evaluation of offers and infrastructure elements as well as the quality of life and culture of welcoming of 10 tourist destinations

Methods of the tourism and living space study Destination Brand 23

Aim of research	– Customer-oriented study on the **image of tourist destinations as tourism and living spaces** in the **source markets:** – Germany (DE), Austria (AT), Switzerland (CH), Netherlands (NL), France (FR), Italy (IT), Spain (ES), United Kingdom (UK), USA (US), China (CN)

Research focus	<u>**Module 1:**</u> Offers & infrastructure
	– **General** (i.e., independent of a specific destination) **relevance** of touristic offers and infrastructure elements when choosing a tourist destination
	– **Supported evaluation of offers and infrastructure** per destination
	– Unsupported nomination of tourist destinations (top of mind)
	
	<u>**Module 1 Digital:**</u> Digital offers and infrastructure elements (fixed set of 5)
	– **General** (i.e. independent of a specific destination) **interest** in digital offers and infrastructure elements
	– **Supported interest in digital offers and infrastructure elements** per destination
	– Unsupported nomination of tourist destinations (top of mind)
	
	<u>**Module 2:**</u> Quality of life & culture of welcoming
	– **General** (i.e., independent of a specific destination) **relevance** of characteristics when choosing a tourist destination
	– Part I **Quality of life**:
	    – Supported evaluation of the **quality of life in general** per destination
	    – Supported evaluation of **five additional characteristics regarding quality of life** per destination
	– Part II **Culture of welcoming**:
	    – Supported evaluation of the **impacts of tourism in general** per destination
	    – Supported evaluation of **five additional characteristics regarding culture of welcoming** per destination
	– Unsupported nomination of tourist destinations (top of mind)

Methods of the tourism and living space study Destination Brand 23

Research focus	<u>**Module 1 + 2:**</u>
	– **Competitor analysis** with all destinations surveyed per source market
	– **Sociodemographic differentiation** of the key results according to 8 different criteria
	– **Standard target group analysis** based on:
	  – sociodemographic criteria
	  – the general (i.e., regardless of a specific destination) interest in holiday activities
	  – the general (i.e., regardless of a specific destination) relevance of tour. offers / infrastructure elements when choosing a tourist destination
	– Source market Germany: Additional target group analyses (chargeable) according to:
	  – the “Sinus Milieus® Germany” and the “Sinus-Meta-Milieus®” by the SINUS-institute
	  – the “BeST types of holidaymakers” by the FH Westküste

Survey design	– **158** destinations (several destinations were surveyed in more than one source market); distribution among the source markets: DE = 148 | AT = 10 | CH = 10 | NL = 10 | CN = 10 | FR = 10 | IT = 10 | ES = 10 | UK = 10 | US = 10 – **Total sample size:** 24,000; per destination: 1,000 distribution among the source markets: DE 15,000 | all other source markets 1,000 each – **Online survey in the respective national language** (remark: CH = German & French) – **Quota sample** based on cross quota age / sex and regional origin – **Representative** of the respective population aged 14-74 years living in private households (deviation only in the source market China*): DE = 61.87 m | AT = 6.89 m | CH = 6.66 m | NL = 13.47 m | FR = 48.55 m | IT = 45.14 m | ES = 34.67 m | UK = 49.89 m | US = 246.50 m * Representative of the Ipsos panel members in China covering the following characteristics: Chinese-speaking urban population (including the top city categories “Tier 1-3” without Hongkong and Macau) aged 14-59 years with Internet access, which according to additional preceding filter questions shows an affinity to travel abroad.
Survey period	– **October / November 2023**

General interest potential of holiday activities

Ranking of the considered holiday activities with regard to the general interest potential (mean = 72%)
Source market: China
Base: All respondents | Number of respondents: 1,000
Top-two-box on a scale from "5 = very interested" to "1 = not at all interested"

Rank	Activity	% of resp.	Rank	Activity	% of resp.
1	**Enjoying nature**	**83%**	22	Visiting Christmas markets	**71%**
2	Discovering regional products / enjoying regional specialities	**82%**	23	Using family offers	**71%**
3	**Enjoying culinary / gastronomic specialities**	**82%**	24	Visiting film locations	**71%**
4	Enjoying the (small) city flair / atmosphere	**81%**	25	Undertaking a barrier-free holiday trip	**70%**
5	Relaxing and resting	**80%**	**26**	**Visiting cultural institutions / using cultural services**	**70%**
6	Experiencing lively places	**78%**	27	Taking a wine tour	**70%**
7	Visiting castles, palaces and cathedrals	**78%**	28	Enjoying being by the water	**69%**
8	Experiencing Contemporary / Modern Culture	**77%**	29	Practising water sports (not sailing)	**69%**
9	Shopping	**76%**	30	Taking a camping holiday / caravanning holiday / motorhome holiday	**69%**
10	Visiting castles, mansions, parks and gardens	**76%**	31	Practising winter sports	**68%**
11	Visiting museums / exhibitions / art museums	**75%**	32	Hiking	**68%**
12	Spending holidays in the countryside	**75%**	33	Enjoying water-based holiday activities	**67%**
13	Attending culture- / music festivals	**75%**	34	Using wellness services	**67%**
14	Undertaking a sustainable holiday trip	**75%**	35	Cycling (not mountain biking)	**66%**
15	Visiting gardens / parks	**75%**	36	Being active and involved in sports	**65%**
16	Swimming and being at the beach	**74%**	37	Using health services (self-paying, not a prescribed visit to a health spa)	**64%**
17	Visiting UNESCO world heritage sites	**74%**	38	Visiting industrial heritage sites	**64%**
18	**Taking a city break**	**73%**	39	Having a workcation	**64%**
19	Using luxury offers	**73%**	40	Mountain biking	**63%**
20	Attending events	**72%**	41	Motorbike riding	**62%**
21	Taking a city break with active recreation	**72%**			

► **Note 1:** Last survey taken into consideration in October / November 2023
► **Note 2:** For reasons of clarity, some of the theme designations have been shortened for this table.

Source: inspektour (international) GmbH, 2023

When interpreting the data, cultural differences in the response behaviour need to be taken into account leading to generally higher top-two-box values on scales asking to express interest, agreement or positive evaluations in the Chinese source market compared to e.g. European source markets and the USA.

General interest potential of holiday activities – *Comparison over time*

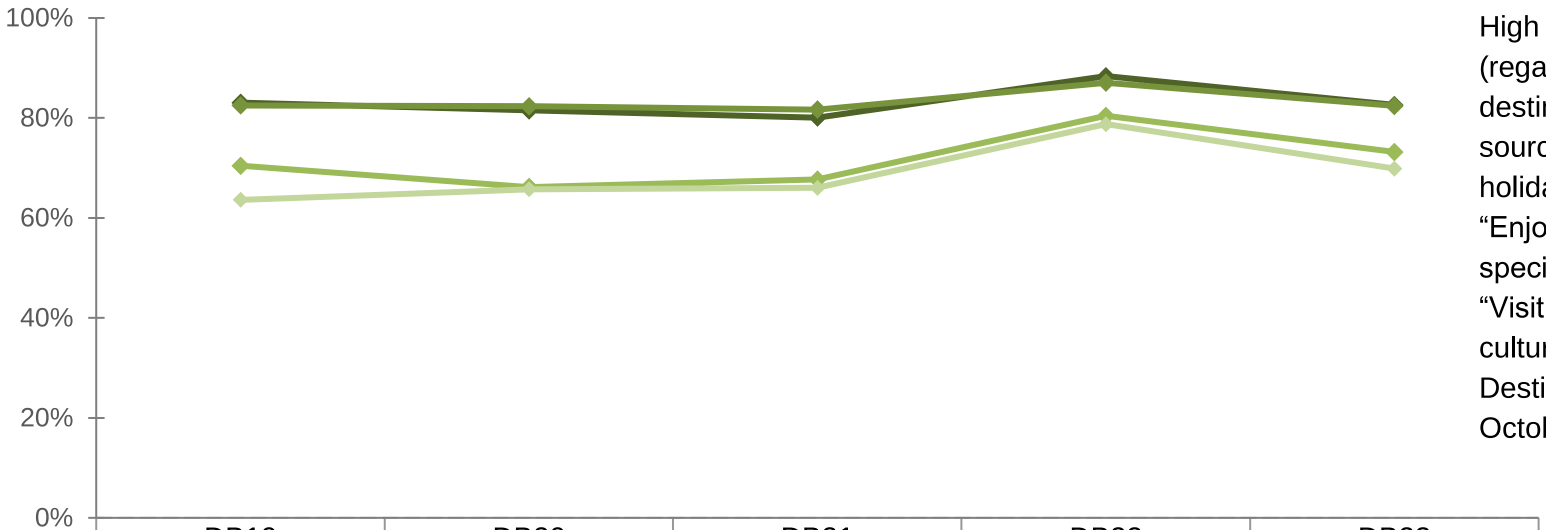
General interest potential

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

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

■ ***General interest potential***

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



	DB19	DB20	DB21	DB22	DB23
Nature	83%	82%	80%	88%	83%
Culinary	82%	82%	82%	87%	82%
City break	70%	66%	68%	80%	73%
Culture	64%	66%	66%	79%	70%

► **Note:** For reasons of clarity, only the short versions of the theme designations are used for this table / illustration.

High level of general interest (regardless of a specific tourist destination) of the respondents in the source market China in the selected holiday activities "Enjoying nature", "Enjoying culinary / gastronomic specialities", "Taking a city break" and "Visiting cultural institutions / using cultural services" with a peak in Destination Brand 22 (survey period: October / November 2022).

Source: inspektour (international) GmbH / IMT of the FH Westküste, 2019 / 2020; inspektour (international) GmbH, 2021 / 2022 / 2023

General intention to travel abroad – *Comparison over time*

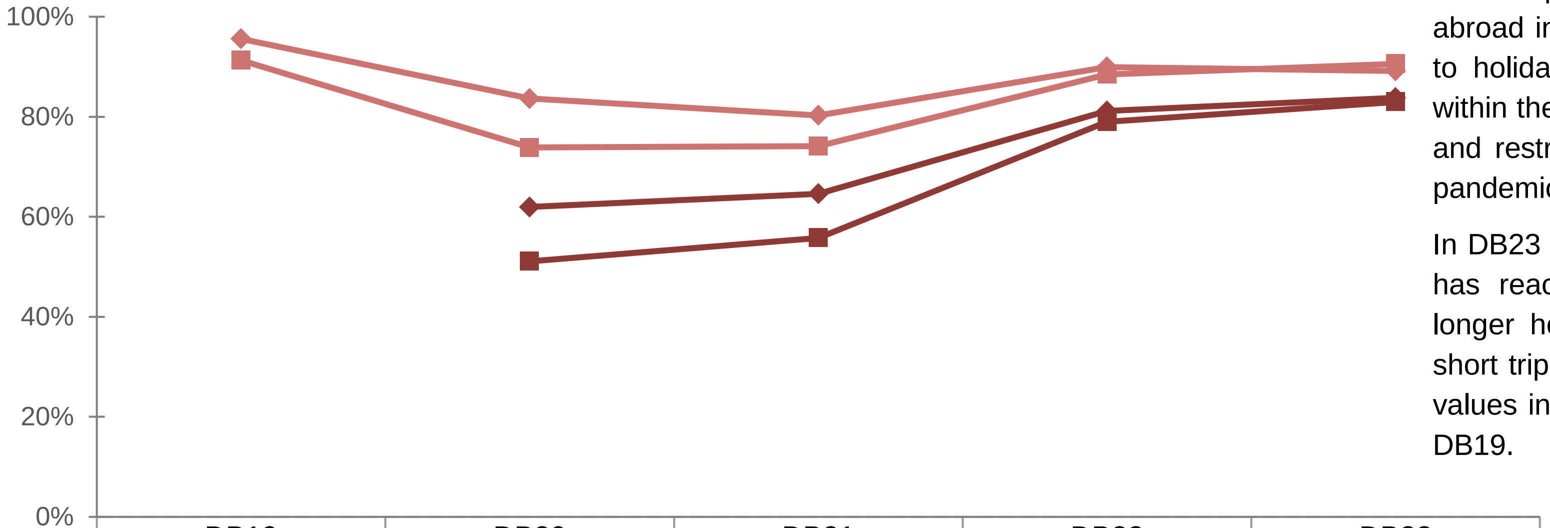
General intention to travel abroad

> Do you intend to undertake an international longer holiday trip (with 4 or more overnight stays) / short trip (with 1 – 3 overnight stays) within the next 12 months / within the next 3 years?

> Top-two-box on a scale from “4 = definitely“ to “1 = definitely not” (in % of respondents)

■ ***General intention to travel abroad***

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



		DB19	DB20	DB21	DB22	DB23
Longer holiday trips (4 or more overnight stays)	12 months		51%	56%	79%	83%
	3 years	91%	74%	74%	89%	91%
Short trips (1-3 overnight stays)	12 months		62%	65%	81%	84%
	3 years	96%	84%	80%	90%	89%

The drop in the general intention to travel abroad in DB20 and DB21 – both with regard to holiday trips within the next 3 years and within the next 12 months – reflects the events and restrictions connected to the coronavirus pandemic between 2020 and 2022.

In DB23 the general intention to travel abroad has reached pre-pandemic levels regarding longer holidays within the next 3 years. For short trips abroad within the next 3 years, the values in DB23 remain slightly below those of DB19.

DESTINATION BRAND

Source: inspektour (international) GmbH / IMT of the FH Westküste, 2019 / 2020; inspektour (international) GmbH, 2021 / 2022 / 2023

Unsupported nomination of tourist destinations (top of mind) – *Top 10 destinations*

If you think of the touristic aspect or the touristic offer "high attractivity of the tourist destination as a whole":

To which international tourist destinations (countries, cities, regions, etc.) is this aspect or offer particularly applicable in your opinion? (max. 3 responses)

■ ***high attractivity (tourist destination as a whole)***

Source market: China
Number of respondents: 817
Number of responses: 1,576
Base: All respondents with valid responses

Unsupported nomination of tourist destinations with reference to "high attractivity of the tourist destination as a whole": Top 10 destinations		% of respondents*	% of responses	number of responses
1	Switzerland	20.8%	10.8%	170
2	Germany	19.6%	10.2%	160
3	France	9.7%	5.0%	79
4	**Spain**	**9.5%**	**4.9%**	**78**
5	Norway	9.3%	4.8%	76
6	Finland	8.6%	4.4%	70
7	Iceland	8.4%	4.4%	69
8	Denmark	8.1%	4.2%	66
8	Sweden	8.1%	4.2%	66
10	Japan	6.4%	3.3%	52
10	Austria	6.4%	3.3%	52

► **Note 1:** Similar terms with identical destination reference (e.g., North Sea - North Sea Coast - North Sea Region) were assigned to each other and clustered.
► **Note 2:** No further Spanish tourist destinations were ranked in the top 50.

* Multiple answers possible.

Source: inspektour (international) GmbH, 2023

DESTINATION BRAND 23

Unsupported nomination of tourist destinations (top of mind) – *Top 10 destinations*

If you think of the characteristic "high culture of welcoming (inviting)":

To which international tourist destinations (countries, cities, regions, etc.) is this characteristic particularly applicable in your opinion? (max. 3 responses)

■ ***high culture of welcoming (inviting)***

Source market: China
Number of respondents: 835
Number of responses: 1,671
Base: All respondents with valid responses

Unsupported nomination of tourist destinations with reference to "high culture of welcoming (inviting)": Top 10 destinations + further Spanish tourist destinations among the Top 50		% of respondents*	% of responses	number of responses
1	Germany	19.5%	9.8%	163
2	Switzerland	15.7%	7.8%	131
3	France	14.5%	7.2%	121
4	Norway	9.0%	4.5%	75
5	**Spain**	**8.9%**	**4.4%**	**74**
6	Finland	8.6%	4.3%	72
7	United Kingdom	7.8%	3.9%	65
8	Sweden	7.5%	3.8%	63
9	Austria	7.4%	3.7%	62
10	Denmark	7.2%	3.6%	60
47	**Barcelona**	**0.4%**	**0.2%**	**3**
47	**Madrid**	**0.4%**	**0.2%**	**3**

Spain is among the top 5 tourist destinations that spontaneously come to the minds of respondents in the source market China for both items presented, which suggests a high level of awareness and a positive image of Spain regarding its attractiveness and culture of welcoming in the minds of the respondents.

This is further reinforced by the positive values surveyed in the supported evaluation (see pages 14-23).

While the country Spain as a whole is mentioned highly frequently, Spanish metropolitan cities such as Barcelona and Madrid were either not mentioned at all (see "high attractivity") or only sporadically (see "high culture of welcoming").

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

* Multiple answers possible.

Source: inspektour (international) GmbH, 2023

General relevance of touristic offers and infrastructure elements

DESTINATION BRAND 23

Ranking of the considered offers and infrastructure elements with regard to the general relevance for destination selection (mean = 74%)
Source market: China
Base: All respondents | Number of respondents: 1,000
Top-two-box on a scale from "5 = very relevant" to "1 = not at all relevant"

		% of resp.			% of resp.
1	Scenery / nature	82%	**20**	**Digital information and services**	**74%**
2	**Arrival options / accessibility**	**80%**	21	(Spa) gardens / parks / green spaces	72%
3	**Culinary offerings**	**80%**	22	Events	72%
4	**Climate friendliness / CO2 neutrality of the tourist offerings**	**80%**	23	Swimming pools / adventure pools / thermal baths	72%
5	**Town and city scape(s) / town centre / architecture**	**80%**	24	Wildlife parks / zoos	71%
6	**The tourist destination as a whole (overall impression)**	**79%**	25	Spa facilities with offerings for wellness, personal care, fitness and preventive health treatments	70%
7	**Regionality / authenticity of tourist offerings**	**79%**	26	Health and spa services	70%
8	Internet access	79%	27	Hiking facilities	70%
9	**Service and customer orientation**	**79%**	**28**	**Barrier-free accessibility of the tourist offerings**	**70%**
10	**Value for money**	**79%**	29	Winter sports facilities	68%
11	**Sustainability of tourist offerings**	**78%**	30	Possibilities for workcations	68%
12	**Accommodation offers**	**78%**	31	Water sports facilities	68%
13	Castles, palaces, mansions	78%	32	Offer to experience Japanese culture / gastronomy	68%
14	**Local mobility services**	**77%**	33	Cycling facilities	67%
15	**Beach / bathing facilities**	**76%**	34	Offer of automobile museums	67%
16	Shopping facilities	76%	35	Wellness and beauty offerings	66%
17	**Art and cultural offerings**	**75%**	36	Harbours / marinas	66%
18	Tourism office / tourism services / tourist information	75%	37	Campsites / caravan and motorhome sites	65%
19	Local recreation facilities / possibilities for day trips	75%			

Source: inspektour (international) GmbH, 2023

► **Note:** Last survey taken into consideration in October / November 2023

General relevance of touristic offers and infrastructures

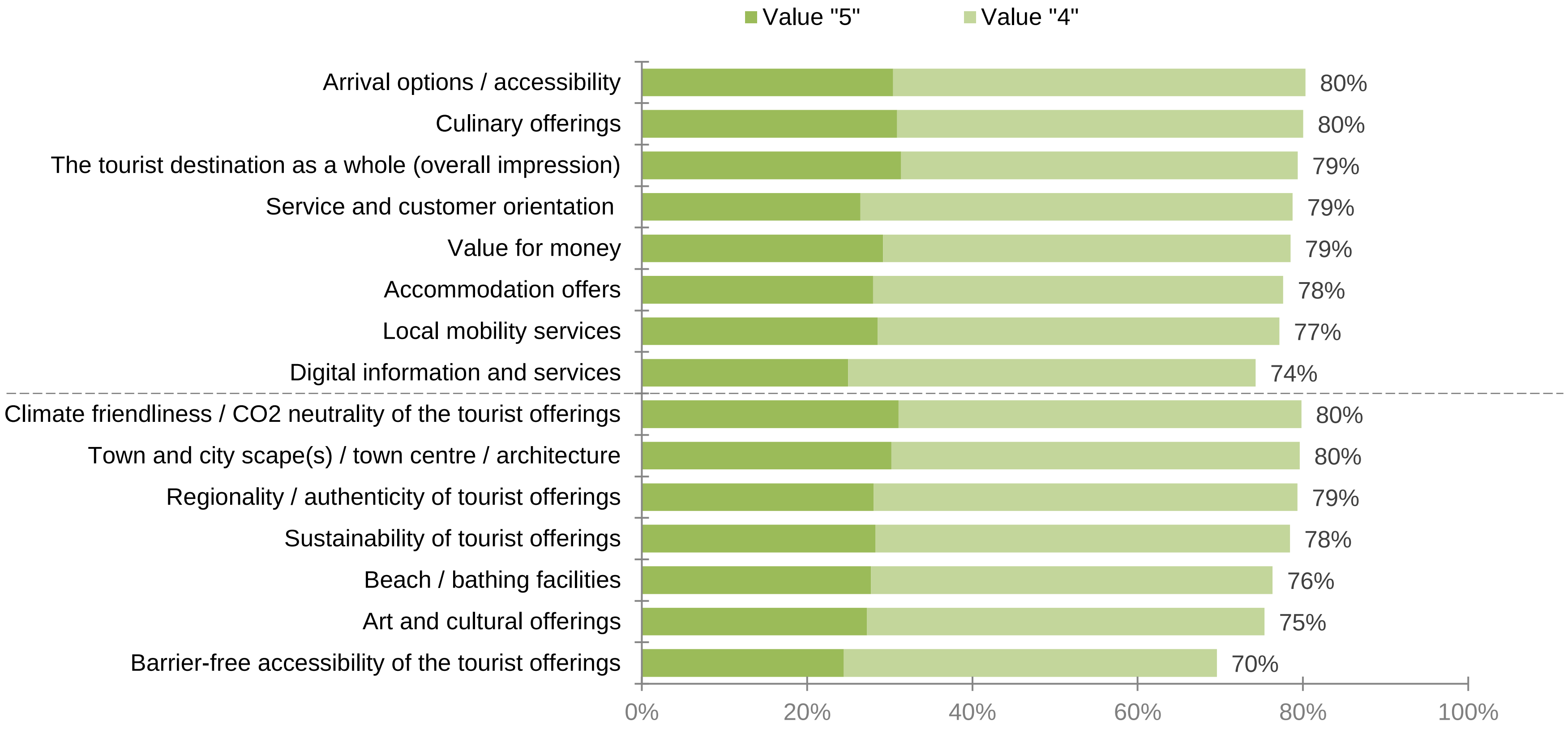
General relevance for destination selection

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

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

Offers and infrastructure elements

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



High level of general relevance for destination selection (regardless of a specific tourist destination) of the chosen touristic aspects, offers and infrastructures.

The highest values are reached by "Arrival options / accessibility", "Culinary offerings", "Climate friend-liness / CO_2 neutrality of the tourist offerings" and "Town and city scape(s) / town centre / architecture" with a top-two-box value of 80% each in the source market China.

Source: inspektour (international) GmbH, 2023

General relevance of characteristics regarding quality of life and culture of welcoming

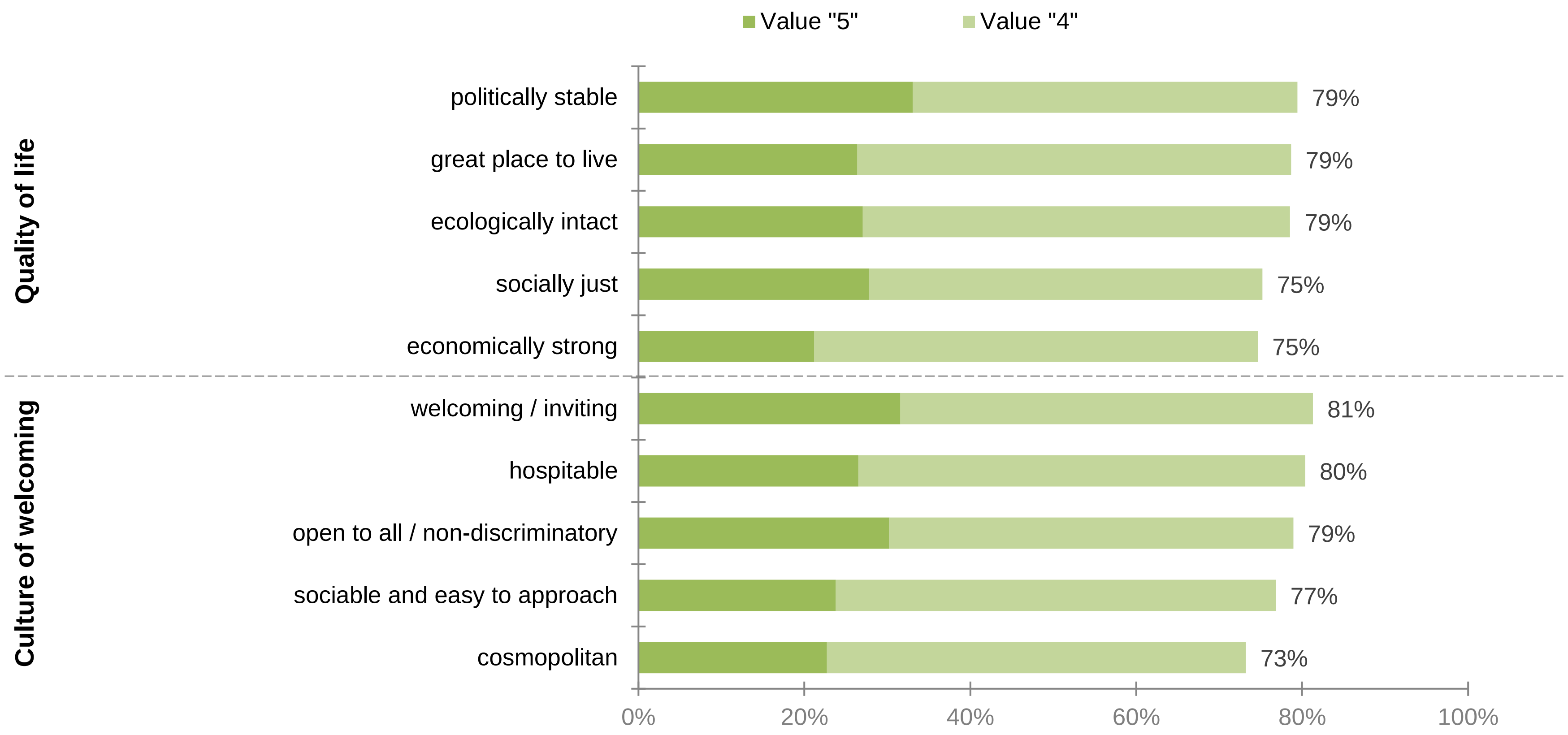
General relevance for destination selection

> How relevant are the following characteristics regarding quality of life / culture of welcoming when you choose a tourist destination for a holiday trip with at least one overnight stay in general (i.e., regardless of a specific tourist destination)?

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

Quality of life and culture of welcoming

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



Again, high level of general relevance for destination selection (regardless of a specific tourist destination) of the surveyed characteristics.

The characteristics "welcoming / inviting" and "hospitable" have the highest relevance for the respondents in the source market China.

Source: inspektour (international) GmbH, 2023

Supported evaluation of offers and infrastructure – *Subgroups (1/2)*

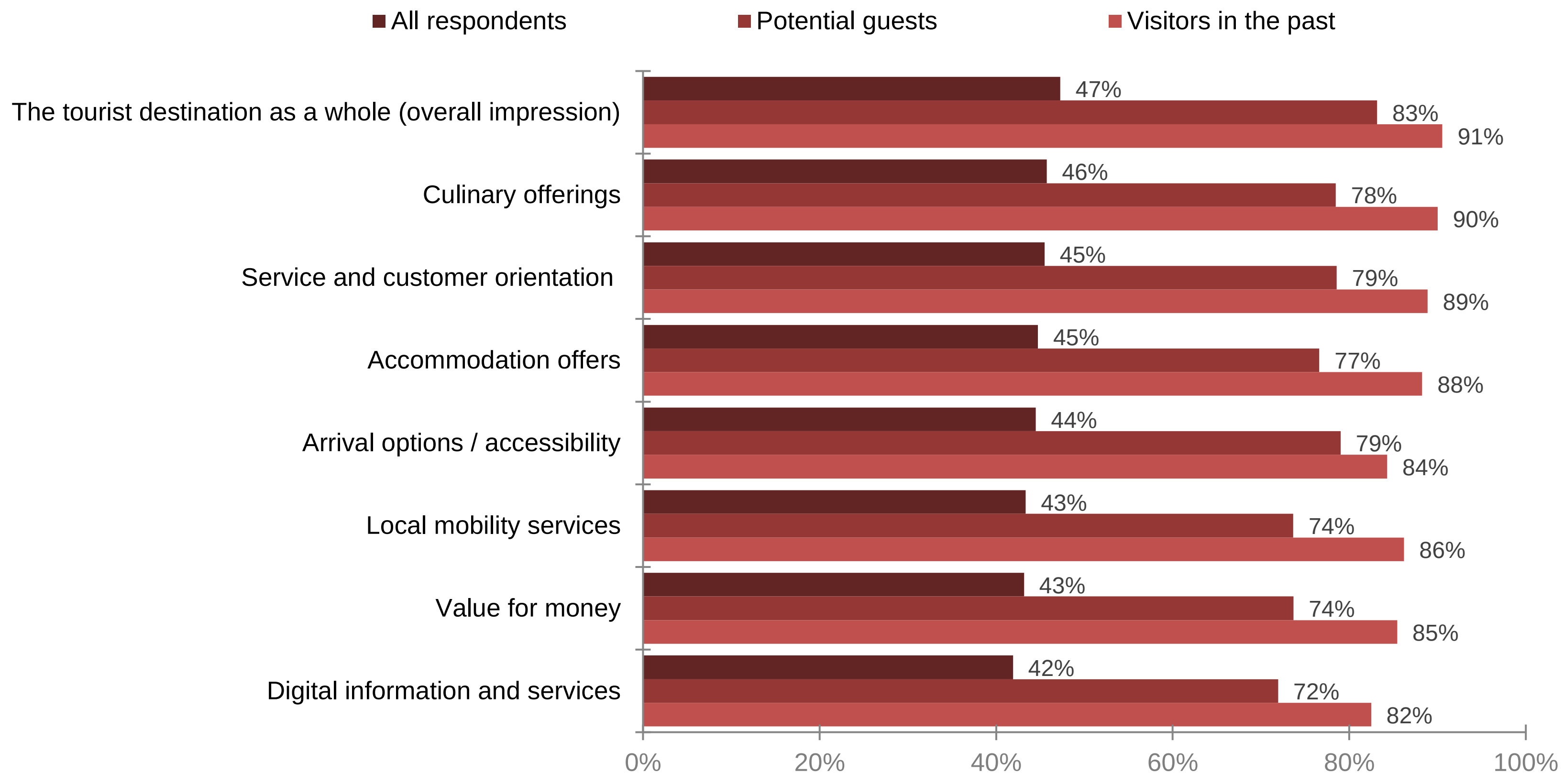
Supported evaluation of offers and infrastructure

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

> Top-two-box on a scale from "5 = very good" bis "1 = very bad" (in % of respondents)

■ ***Spain (西班牙)***

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



Subgroups:

"All respondents": Refers to the total number of respondents (n = 1,000). Among them exclusively those were asked to assess Spain who know the tourist destination Spain at least by name

"Potential guests": Respondents who are familiar with the destination (even if only by name) but who have not yet spent a holiday with at least one overnight stay there

"Visitors in the past": Respondents who have already holidayed in the tourist destination (with at least one overnight stay)

Source: inspektour (international) GmbH, 2023

Supported evaluation of offers and infrastructure – *Subgroups (2/2)*

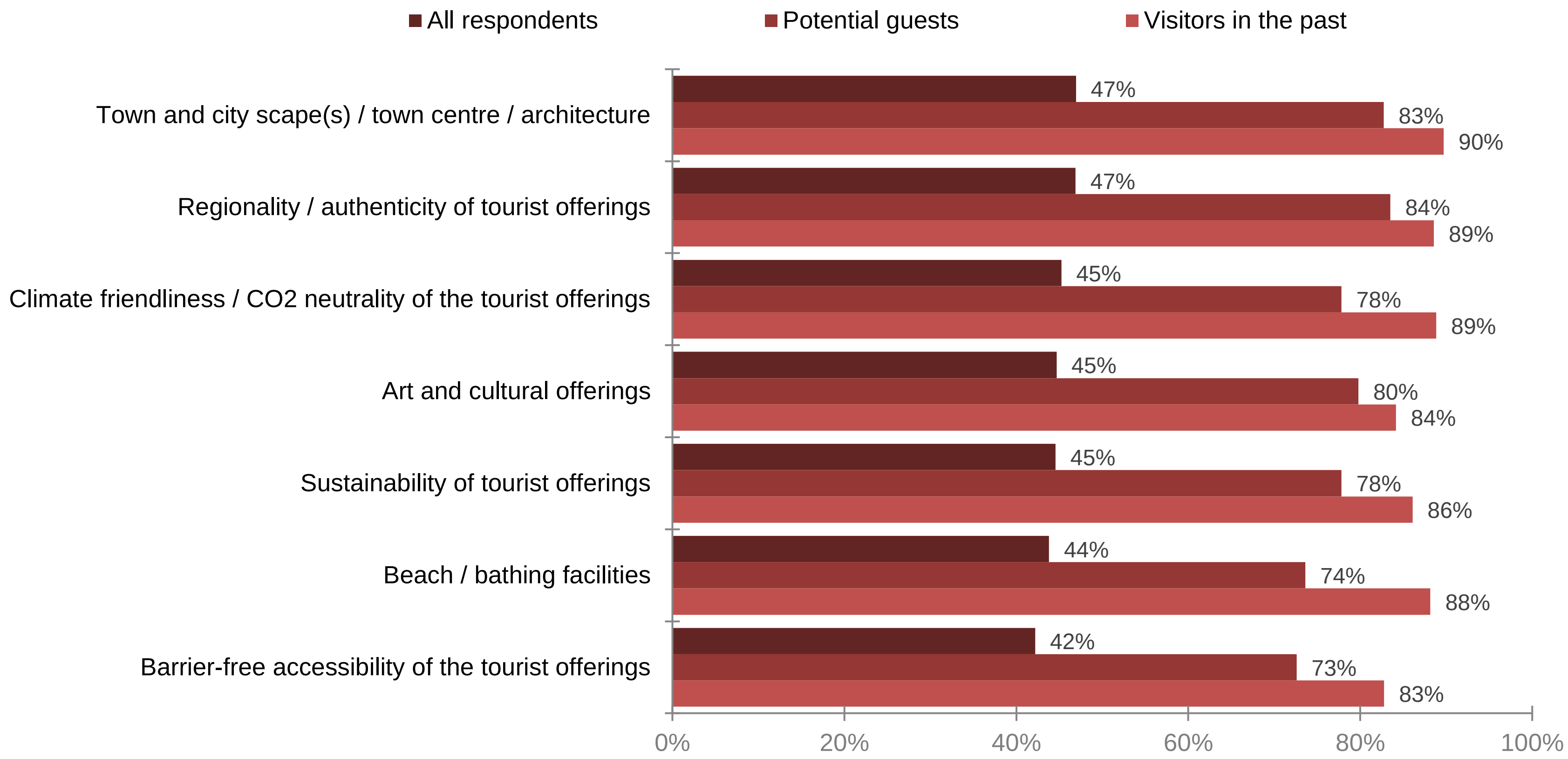
Supported evaluation of offers and infrastructure

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

> Top-two-box on a scale from "5 = very good" bis "1 = very bad" (in % of respondents)

■ ***Spain (西班牙)***

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



The positive image of Spain in the minds of the respondents suggested by the unsupported nominations (top of mind) on page 9 and 10 is reinforced by the positive assessment of the selected touristic aspects, offers and infrastructures.

The positive image among potential guests (who know the destination Spain (even if only by name) but have not visited it yet) is further confirmed by the positive assessment of respondents who have visited Spain in the past. These positive evaluations by both subgroups can attest to the quality of the surveyed aspects in the destination Spain.

If the gap between the two subgroups is (a bit) larger, it could suggest a difference between the marketed or perceived image by the potential guests to the actual experience of the visitors in the past.

Source: inspektour (international) GmbH, 2023

Supported evaluation of offers and infrastructure – *Target groups (1/2)*

Supported evaluation of offers and infrastructure

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

> Top-two-box on a scale from "5 = very good" bis "1 = very bad" (in % of respondents)

■ ***Spain (西班牙)***

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

Supported evaluation of offers and infrastructure – *Target groups* *(in % of respondents)*	All respondents	Gen Z	Millennials	Gen X	Silver	Young people from Tier 1 cities	Young people from Tier 2/3 cities	Elder people from Tier 1 cities*	Elder people from Tier 2/3 cities
Accommodation offers	**45%**	41%	52%	39%	35%	49%	46%	45%	39%
Arrival options / accessibility	**44%**	41%	51%	41%	30%	49%	47%	40%	42%
Culinary offerings	**46%**	41%	54%	41%	32%	50%	49%	45%	40%
Digital information and services	**42%**	38%	48%	38%	33%	45%	46%	42%	38%
Local mobility services	**43%**	38%	51%	38%	33%	48%	46%	39%	38%
Service and customer orientation	**45%**	41%	53%	40%	37%	49%	48%	42%	42%
Value for money	**43%**	39%	51%	37%	34%	47%	49%	40%	40%
The tourist destination as a whole (overall impression)	**47%**	45%	53%	43%	38%	50%	52%	46%	45%

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

Source: inspektour (international) GmbH, 2023

Supported evaluation of offers and infrastructure – *Target groups (2/2)*

Supported evaluation of offers and infrastructure

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

> Top-two-box on a scale from “5 = very good” bis “1 = very bad” (in % of respondents)

■ *Spain (西班牙)*

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

Supported evaluation of offers and infrastructure – *Target groups* *(in % of respondents)*	All respondents	Gen Z	Millennials	Gen X	Silver	Young people from Tier 1 cities	Young people from Tier 2/3 cities	Elder people from Tier 1 cities*	Elder people from Tier 2/3 cities
Art and cultural offerings	**45%**	38%	52%	40%	37%	48%	47%	42%	42%
Barrier-free accessibility of the tourist offerings	**42%**	38%	50%	36%	34%	46%	46%	39%	36%
Beach / bathing facilities	**44%**	40%	51%	38%	32%	48%	48%	36%	41%
Climate friendliness / CO2 neutrality of the tourist offerings	**45%**	41%	51%	42%	34%	49%	48%	44%	42%
Regionality / authenticity of tourist offerings	**47%**	44%	55%	39%	36%	51%	53%	42%	41%
Sustainability of tourist offerings	**45%**	42%	50%	42%	33%	48%	45%	45%	40%
Town and city scape(s) / town centre / architecture	**47%**	47%	53%	42%	35%	51%	50%	45%	42%

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

Source: inspektour (international) GmbH, 2023

Supported evaluation of quality of life – *Quality of life in general*

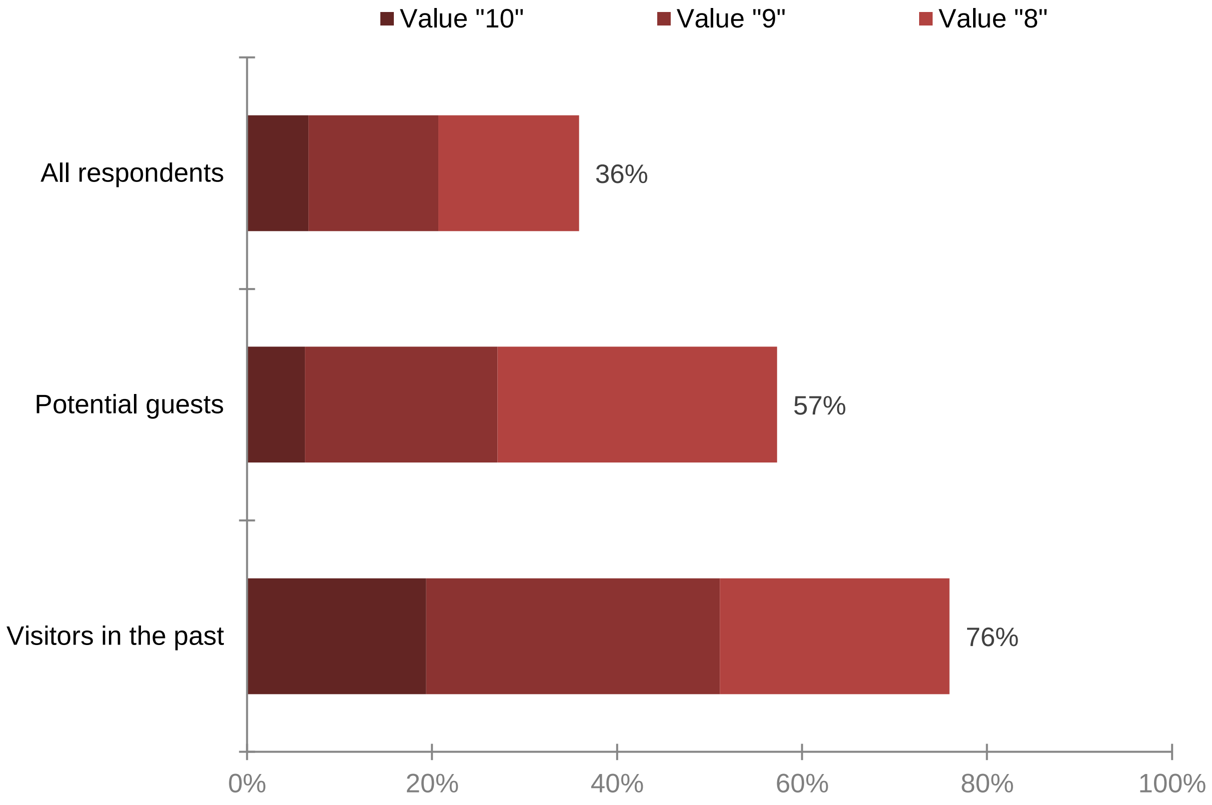
Supported evaluation of the quality of life in general

> How do you assess the current quality of life in the following tourist destinations?

> Share of high quality of life (top-three-box) on a scale of “10 = very high quality of life” to “0 = very low quality of life” (in % of respondents)

Spain (西班牙)

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



Spain ranks 6th out of 11 international destinations surveyed in the source market China regarding high quality of life only surpassed by selected Scandinavian countries, Germany and Switzerland.

Source: inspektour (international) GmbH, 2023

Supported evaluation of quality of life – *Subgroups*

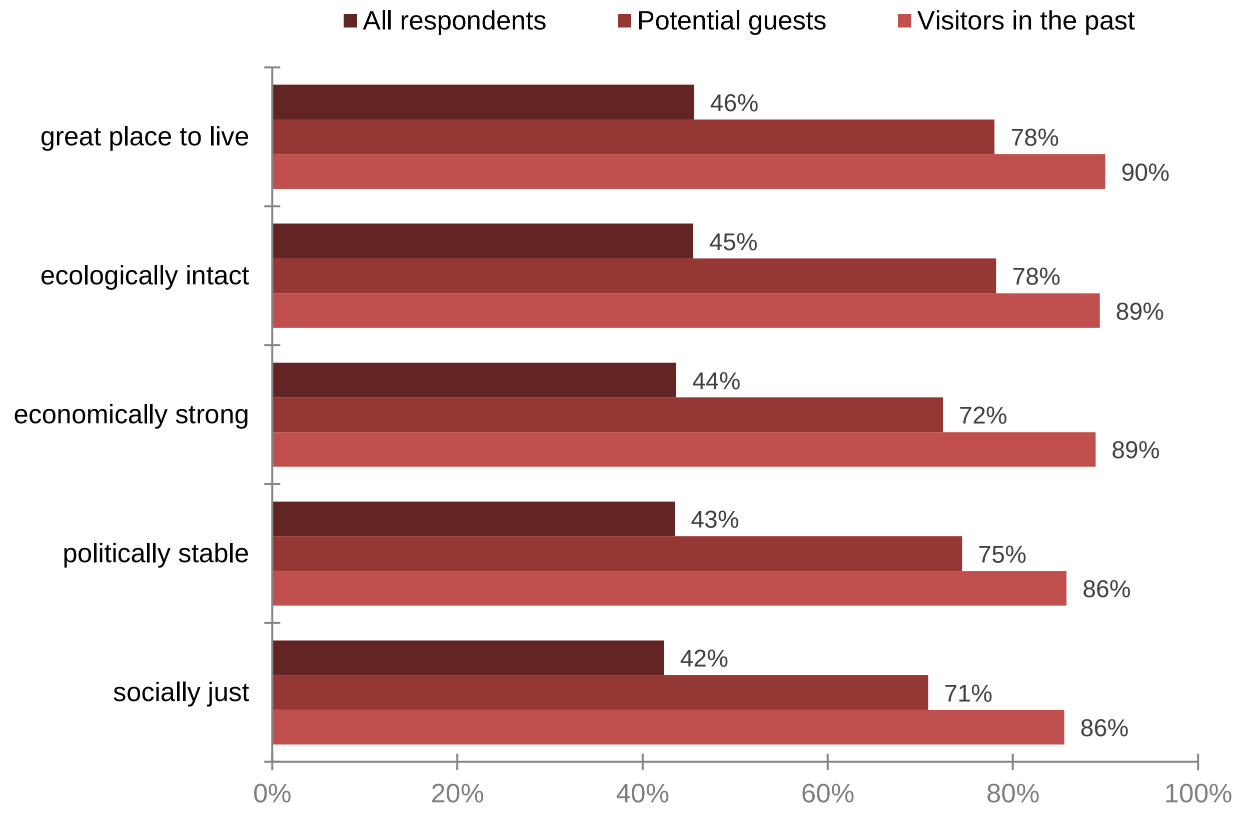
Supported evaluation of characteristics regarding quality of life

> Please indicate to what extent the following characteristics are applicable to the following tourist destination with regard to the quality of life there?

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

Spain (西班牙)

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



Similarly to the evaluation of touristic aspects, offers and infrastructures, the perceived levels of applicability of the surveyed characteristics to the destination Spain are high and the image reflected by the answers of potential guests is confirmed by the evaluation of visitors in the past.

This is true for the characteristics regarding quality of life as well as the characteristics regarding culture of welcoming (see page 22).

Source: inspektour (international) GmbH, 2023

The highest top-two-box values per characteristic are marked in green and the lowest in orange. Similar to the target group analysis regarding the supported evaluation of offers and infrastructure of the destination Spain, the "Millennials" is the target group with the highest top-two-box values and the target group "Silver" is, with one exception (see "Quality of life in general"), the one with the lowest top-two-box values in the source market China.

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Supported evaluation of quality of life – *Target groups*

Supported evaluation of quality of life in general

> Share of high quality of life (top-three-box) on a scale from "10 = very high quality of life" to "0 = very low quality of life" (in % of respondents)

Supported evaluation of characteristics regarding quality of life

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

■ *Spain (西班牙)*

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

Supported evaluation of quality of life – *Target groups* (in % of respondents)	All respondents	Gen Z	Millennials	Gen X	Silver	Young people from Tier 1 cities	Young people from Tier 2/3 cities	Elder people from Tier 1 cities*	Elder people from Tier 2/3 cities
Quality of life in general	**36%**	26%	44%	31%	30%	39%	38%	34%	33%
ecologically intact	**45%**	40%	52%	42%	36%	49%	46%	43%	43%
economically strong	**44%**	39%	51%	39%	32%	48%	47%	41%	41%
great place to live	**46%**	43%	51%	42%	35%	49%	47%	43%	45%
politically stable	**43%**	40%	50%	38%	35%	48%	47%	40%	40%
socially just	**42%**	36%	48%	40%	34%	46%	42%	39%	41%

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

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Source: inspektour (international) GmbH, 2023

Supported evaluation of culture of welcoming – *Impacts of tourism in general*

Supported evaluation of impacts of tourism in general

> Next we would like to know how you assess the impacts of tourism on the following tourist destinations?

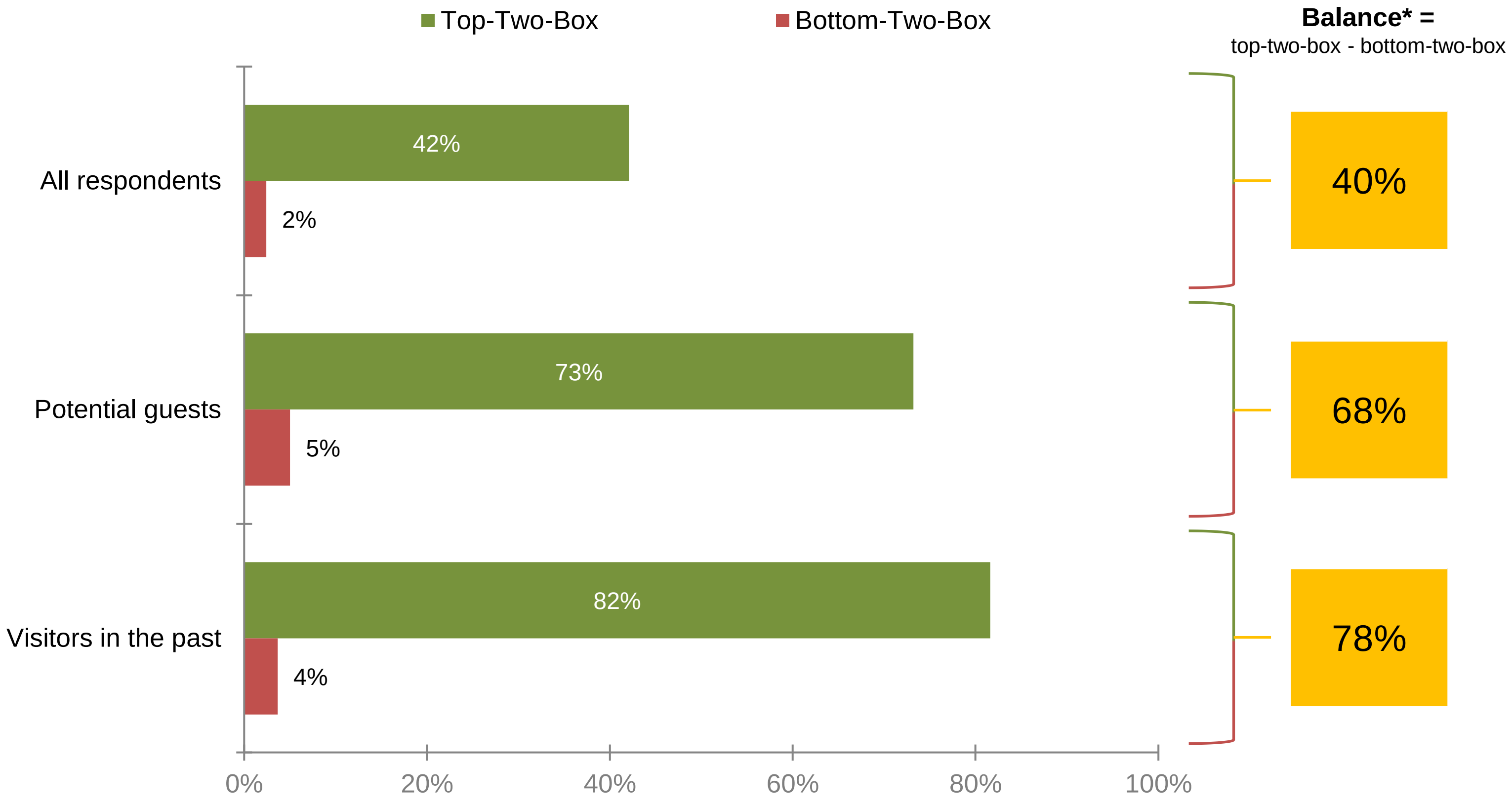
> Balance (= top-two-box – bottom-two-box on a scale of "5 = mostly positive" to "1 = mostly negative" | in % of respondents)

■ ***Spain (西班牙)***

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

The impacts of tourism on the tourist destination Spain are perceived as mostly positive by the respondents in the source market China. The top-two-box values are significantly higher than the bottom-two-box values resulting in a high and positive balance value.

Again, the visitors in the past reinforce the positive image perceived by the potential guests with a higher top-two-box value and a slightly lower bottom-two-box value resulting in a higher positive balance value.



Source: inspektour (international) GmbH, 2023

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

Supported evaluation of culture of welcoming – *Subgroups*

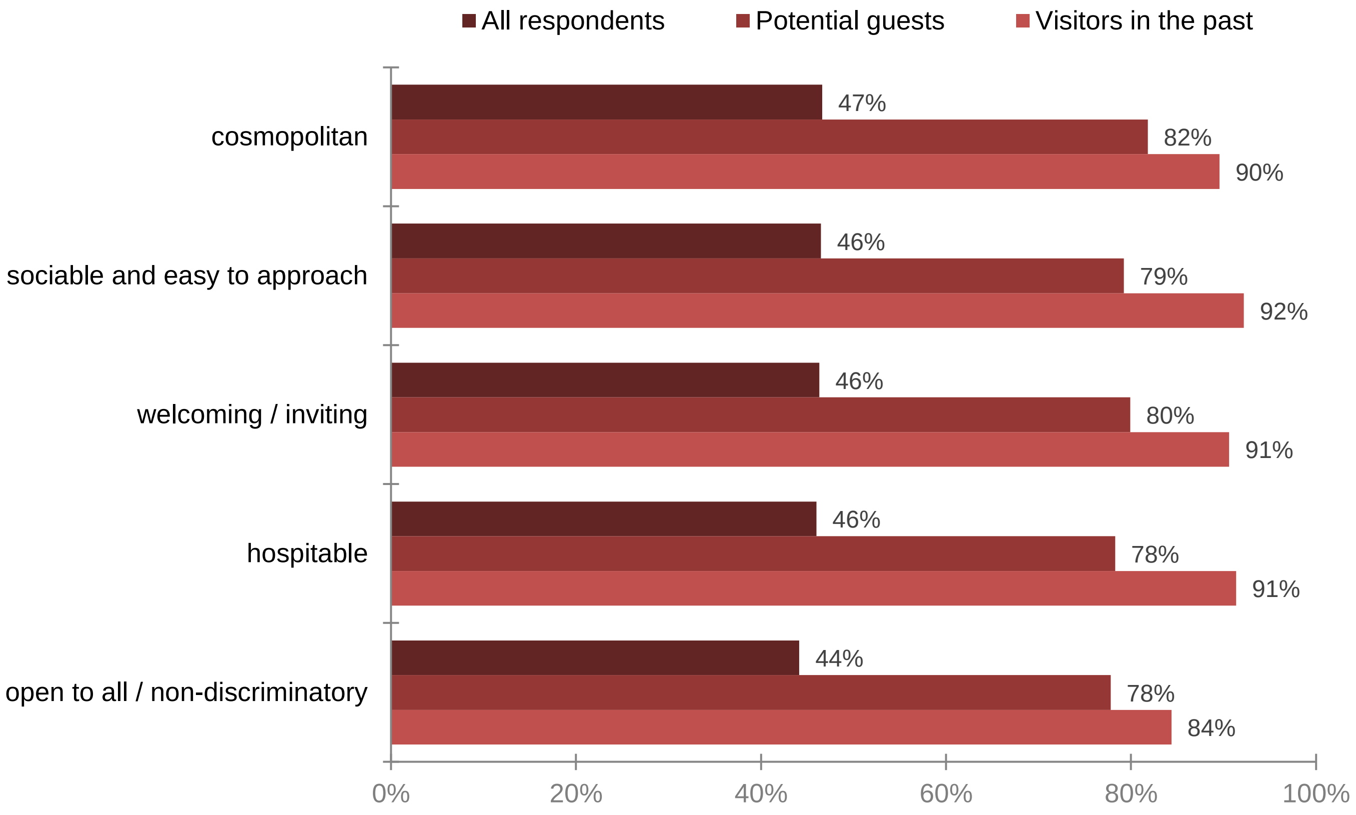
Supported evaluation of characteristics regarding culture of welcoming

> Please indicate to what extent the following characteristics are applicable to the following tourist destination with regard to the culture of welcoming there?

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

■ ***Spain (西班牙)***

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



In general, all the surveyed characteristics are seen as applicable to the destination and there is little difference between the evaluations of the different items.

Only the applicability of the characteristic "open to all / non-discriminatory" is rated slightly lower by visitors in the past in comparison to the other characteristics.

Source: inspektour (international) GmbH, 2023

The highest top-two-box values per characteristic are marked in green and the lowest in orange. Similar to the target group analysis regarding the supported evaluation of offers and infrastructure of the destination Spain, the "Millennials" is the target group with the highest top-two-box values and the target group "Silver" is, with one exception (see "Impacts of tourism in general"), the one with the lowest top-two-box values in the source market China.

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Supported evaluation of culture of welcoming – *Target groups*

Supported evaluation of impacts of tourism in general

> Balance (= top-two-box – bottom-two-box on a scale from "5 = mostly positive" to "1 = mostly negative" | in % of respondents)

Supported evaluation of characteristics regarding culture of welcoming

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

■ ***Spain (西班牙)***

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

Supported evaluation of culture of welcoming – *Target groups* *(in % of respondents)*	All respondents	Gen Z	Millennials	Gen X	Silver	Young people from Tier 1 cities	Young people from Tier 2/3 cities	Elder people from Tier 1 cities*	Elder people from Tier 2/3 cities
Impacts of tourism in general	**40%**	38%	46%	31%	36%	43%	44%	31%	36%
cosmopolitan	**47%**	41%	54%	43%	34%	52%	47%	45%	44%
hospitable	**46%**	42%	52%	42%	38%	50%	45%	45%	44%
open to all / non-discriminatory	**44%**	39%	52%	38%	34%	50%	45%	43%	38%
sociable and easy to approach	**46%**	44%	53%	41%	37%	50%	50%	40%	43%
welcoming / inviting	**46%**	41%	54%	41%	35%	52%	49%	41%	43%

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

DESTINATION BRAND 23

Source: inspektour (international) GmbH, 2023

DESTINATION BRAND 19

SPONTANEOUS ASSOCIATIONS TO TOURIST DESTINATIONS

SOURCE MARKET **CHINA**

Extract for the tourist destination Spain (西班牙)

► **Note:** Queried designation of Spain for Chinese respondents = “西班牙”

Customer-oriented study of the spontaneous associations to tourist destinations

total 1,005 respondents I population representative study | 10 individual destinations

Methods spontaneous associations study Destination Brand 19

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

Research focus	– **Spontaneous associations** per destination classified in sub- and superior categories
	– **Standard target group analysis** based on:
	  – sociodemographic criteria
	  – the general (i.e., regardless of a specific destination) interest in holiday activities
	– Source market Germany: Additional target group analyses (chargeable) according to:
	  – the "Sinus Milieus® Germany" and the "Sinus-Meta-Milieus®" by the SINUS-institute
	  – the "9+1 types of holidaymakers" by the FH Westküste
	DESTINATION BRAND 19

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** of the respective population aged 14-74 years living in private households (deviation only in the source market China*) * Representative of the Ipsos panel members in China covering the following characteristics: Chinese-speaking urban population (including the top city categories "Tier 1-3" without Hongkong and Macau) aged 14-59 years with Internet access, which according to additional preceding filter questions shows an affinity to travel abroad.
Survey period	– **November / December 2019**

Overview of the association superior categories

Overview of the association superior categories

*> What comes spontaneously to your mind when thinking of the international tourist destination **Spain (西班牙)**?*

■ ***Spain (西班牙)***

Source market: China
Base: All respondents
Number of respondents: 1,005

	Association superior categories	% of respondents	% of responses	Number of individual responses
1	sights / attractions / events	52.3%	22.0%	526
2	tradition & customs / regionality	46.6%	19.5%	468
3	general geographical location / places, cities and regions in Spain and in the surroundings including attributes	35.5%	14.9%	357
4	general positive assessment / well-being	30.9%	13.0%	311
5	culinary in general	15.6%	6.6%	157
6	landscape / nature / climate in general	7.0%	2.9%	70
7	beach / coast / water	6.5%	2.7%	65
8	holiday in general / holiday and leisure activities	3.0%	1.3%	30
	further associations to destination Spain without category allocation	9.9%	4.1%	99
	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)	31.1%	13.1%	313
	sum of individual responses encompassing all categories	**238.4%***	**100.0%***	**2,396***

The associations of the respondents to the destination Spain are high in quantity and very detailed. All superior categories have positive connotations and the holiday themes in focus (see page 6 and 7) are also reflected in the superior categories, e.g., mentions regarding culture can mostly be found in the superior categories "traditions & customs / regionality" and "sights / attractions / events" etc.

* Due to the multiple response option, the sum of the individual responses (2,396) is higher than the total number of respondents (1,005).

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

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Top 20 subcategories of associations – *Wordcloud (Base: All respondents)*

In addition to the holiday themes, some of the selected touristic aspects, offers and infrastructures surveyed in DB23 can be linked with the top 20 associations.

For example, associations such as “Gaudí’s architecture”, “Palacio Real de Madrid”, “Barcelona”, “Madrid”, “Sevilla” and “beautiful cathedrals” can be linked to the aspects “town and city scape(s) / town centre / architecture” and “art and cultural offerings” which received positive evaluations in DB23.

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

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

Overall top 20 association subcategories – *Subgroups (1/2)*

Overall top 20 association subcategories

> *What comes spontaneously to your mind when thinking of the international tourist destination* ***Spain (西班牙)****?*

> *in % of respondents*

■ ***Spain (西班牙)***

Source market: China
Base: All respondents by subgroups
Number of respondents: 1,005

	Overall top 20 association subcategories – *Subgroups* *(in % of respondents)*	**All respondents**	**Potential guests**	**Visitors in the past**
1	(wild) bullfighting (arena) / bullfighter / Corrida de toros / Las Ventas / Plaza de Toros de Ronda	**37.3%**	53.6%	43.4%
2	(Spanish) football (European champion, life, mecca, field) / La Liga / El Clásico	**18.1%**	24.9%	23.9%
3	Barcelona	**12.7%**	17.8%	16.1%
4	(very) enthusiastic / adventure / exciting / lively / energetic / excited / untamed	**10.1%**	12.9%	16.1%
5	Madrid	**9.0%**	13.3%	9.3%
6	general positive assessment / well-being (e.g., beautiful, attractive, inspiring, fascinating, I like, (very) good, interesting, positive)	**4.7%**	4.1%	12.2%
7	romantic / romantic feelings / passion	**4.5%**	5.4%	7.8%
8	delicious food / Mediterranean food / special recipes	**4.2%**	5.4%	6.3%
9	church(es) / cathedrals in general as well as several other specific churches or cathedrals, e.g., Iglesia de Santo Tomé, Giralda, Cathedral of Albarracín / Burgos / Cuenca / Seville / Toledo, Mosque–Cathedral of Córdoba, Prado	**3.7%**	5.2%	4.4%
10	Real Madrid / Estadio Santiago Bernabéu / Asensio / Casillas / Kroos / Marcelo / Ramos / Raul / Zidane	**3.6%**	5.6%	2.9%

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

Overall top 20 association subcategories – *Subgroups (2/2)*

Overall top 20 association subcategories

> What comes spontaneously to your mind when thinking of the international tourist destination ***Spain (西班牙)****?*

> in % of respondents

Spain (西班牙)

Source market: China
Base: All respondents by subgroups
Number of respondents: 1,005

	Overall top 20 association subcategories – *Subgroups* *(in % of respondents)*	All respondents	Potential guests	Visitors in the past
11	Palacio Real de Madrid	**3.2%**	4.7%	3.4%
12	Casa Batlló / Casa Milà / Park Güell / Gaudí (architecture)	**3.1%**	3.7%	5.4%
13	(grape, red) wine	**2.8%**	4.3%	2.4%
14	(Latin, Spanish) dance / dancing in general as well as several other specific dances, e.g. Belly dance, Paso Doble, Tango	**2.7%**	3.9%	2.9%
15	Sevilla	**2.5%**	3.0%	4.4%
16	(rice with) seafood	**2.2%**	3.6%	1.5%
16	Flamenco	**2.2%**	3.4%	2.0%
18	open minded / relaxed / can have fun / tolerant	**2.1%**	2.4%	3.9%
19	(cosy, beautiful) landscape (environment, area) / (beautiful) environment / (beautiful, a lot of) nature	**1.9%**	2.8%	2.0%
19	(beautiful, Spanish) women / girls / Lolita	**1.9%**	2.6%	2.4%
19	special / different / exotic / mysterious	**1.9%**	2.4%	2.9%

In some instances, the percentage values reached by visitors in the past surpass those of the potential guests who noted associations in the same category and the other way around, marking the differences between the perceived image (%-values of potential guests) and the actual experience (%-values of visitors in the past).

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

Overall top 20 association subcategories – *Target groups*
Target group definitions for the tourist destination Spain

“Gen Z”	Age of the respondents: 14-24 years
“Millennials”	Age of the respondents: 25-42 years
“Gen X”	Age of the respondents: 43-54 years
“Silver”	Age of the respondents: 55-59 years
“Young people from Tier 1 cities”	Age of the respondents: 14-42 years and Town size: Tier 1 cities
“Young people from Tier 2/3 cities”	Age of the respondents: 14-42 years and Town size: Tier 2/3 cities
“Elder people from Tier 1 cities”	Age of the respondents: 43-59 years and Town size: Tier 1 cities
“Elder people from Tier 2/3 cities”	Age of the respondents: 43-59 years and Town size: Tier 2/3 cities

Overall top 20 association subcategories – *Target groups (1/2)*

The target groups with the highest values per association are marked in green, which shows that the biggest share of the associations within the majority of the top 20 association subcategories was mentioned by the "Elder people from Tier 1 cities" followed by the target groups "Silver" and "Gen Z".

Overall top 20 association subcategories

> What comes spontaneously to your mind when thinking of the international tourist destination ***Spain (西班牙)****?*

> in % of respondents

■ ***Spain (西班牙)***

Source market: China
Base: All respondents by target groups*
Number of respondents: 1,005

	Overall top 20 association subcategories – *Target groups* *(in % of respondents)*	All respondents	Gen Z	Millennials	Gen X	Silver**	Young people from Tier 1 cities	Young people from Tier 2/3 cities	Elder people from Tier 1 cities**	Elder people from Tier 2/3 cities
1	(wild) bullfighting (arena) / bullfighter / Corrida de toros / Las Ventas / Plaza de Toros de Ronda	**37.3%**	36.8%	35.0%	36.2%	54.9%	31.0%	39.5%	40.3%	39.7%
2	(Spanish) football (European champion, life, mecca, field) / La Liga / El Clásico	**18.1%**	23.1%	17.2%	17.1%	15.9%	17.9%	19.8%	25.8%	14.8%
3	Barcelona	**12.7%**	15.9%	13.3%	11.2%	8.5%	15.0%	13.4%	11.3%	10.5%
4	(very) enthusiastic / adventure / exciting / lively / energetic / excited / untamed	**10.1%**	9.3%	9.6%	10.9%	12.2%	8.4%	10.5%	17.7%	9.8%
5	Madrid	**9.0%**	14.3%	10.5%	4.6%	4.9%	10.6%	12.5%	1.6%	5.2%
6	general positive assessment / well-being (e.g., beautiful, attractive, inspiring, fascinating, I like, (very) good, interesting, positive)	**4.7%**	3.8%	4.8%	5.6%	2.4%	3.3%	5.5%	8.1%	4.6%
7	romantic / romantic feelings / passion	**4.5%**	3.8%	4.6%	4.3%	4.9%	4.7%	4.1%	6.5%	4.0%
8	delicious food / Mediterranean food / special recipes	**4.2%**	3.8%	3.4%	4.3%	8.5%	3.6%	3.5%	1.6%	5.8%
9	church(es) / cathedrals in general as well as several other specific churches or cathedrals, e.g., Iglesia de Santo Tomé, Giralda, Cathedral of Albarracín / Burgos / Cuenca / Seville / Toledo	**3.7%**	2.7%	3.9%	4.3%	2.4%	2.6%	4.4%	6.5%	3.4%
10	Real Madrid / Estadio Santiago Bernabéu / Asensio / Casillas / Kroos / Marcelo / Ramos / Raul / Zidane	**3.6%**	2.2%	5.5%	2.6%	0.0%	4.4%	4.7%	4.8%	1.5%

* 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.

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

Overall top 20 association subcategories – *Target groups (2/2)*

Overall top 20 association subcategories

> What comes spontaneously to your mind when thinking of the international tourist destination ***Spain (西班牙)****?*

> in % of respondents

■ ***Spain (西班牙)***

Source market: China
Base: All respondents by target groups*
Number of respondents: 1,005

	Overall top 20 association subcategories – *Target groups* (*in % of respondents*)	All respondents	Gen Z	Millennials	Gen X	Silver**	Young people from Tier 1 cities	Young people from Tier 2/3 cities	Elder people from Tier 1 cities**	Elder people from Tier 2/3 cities
11	Palacio Real de Madrid	**3.2%**	1.1%	4.1%	3.0%	2.4%	3.3%	3.2%	8.1%	1.8%
12	Casa Batlló / Casa Milà / Park Güell / Gaudí (architecture)	**3.1%**	2.7%	1.6%	5.3%	3.7%	3.6%	0.6%	1.6%	5.5%
13	(grape, red) wine	**2.8%**	3.8%	2.1%	2.6%	3.7%	2.6%	2.9%	4.8%	2.5%
14	(Latin, Spanish) dance / dancing in general as well as several other specific dances, e.g. Belly dance, Paso Doble, Tango	**2.7%**	3.3%	1.8%	3.9%	1.2%	2.6%	2.0%	4.8%	3.1%
15	Sevilla	**2.5%**	4.4%	2.7%	1.0%	3.7%	2.6%	3.8%	1.6%	1.5%
16	(rice with) seafood	**2.2%**	3.3%	1.4%	2.6%	3.7%	2.6%	1.5%	1.6%	3.1%
16	Flamenco	**2.2%**	3.3%	1.6%	1.3%	6.1%	1.5%	2.6%	3.2%	2.2%
18	open minded / relaxed / can have fun / tolerant	**2.1%**	2.7%	1.8%	2.3%	2.4%	2.2%	2.0%	1.6%	2.5%
19	(cosy, beautiful) landscape (environment, area) / (beautiful) environment / (beautiful, a lot of) nature	**1.9%**	1.6%	1.8%	2.6%	1.2%	1.5%	2.0%	4.8%	1.5%
19	(beautiful, Spanish) women / girls / Lolita	**1.9%**	1.1%	1.1%	1.0%	9.8%	0.4%	2.0%	1.6%	3.1%
19	special / different / exotic / mysterious	**1.9%**	3.3%	1.8%	1.6%	0.0%	1.1%	3.2%	1.6%	1.2%

* 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

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