



DESTINATION BRAND 25

The BrandValue+ of cities + metropolitan regions:
Presentation of selected key results from
all 10 source markets

Destination Brand – inspektour



inspektour
TOURISM AND MARKET RESEARCH

What can you expect today?

DESTINATION BRAND 25 at a glance

**Presentation of selected key results for cities + metropolitan regions
from all 10 source markets**

Q&A session

DESTINATION BRAND 25 at a glance:

The BrandValue+ of tourist destinations in 10 source markets

DESTINATION BRAND 25 – at a glance

**Basic module:
BrandValue+**

**Additional module:
TravelIntent+**

Representative of the
local population aged
between
14 to 74 years

Source market DE:
Target group analysis
according to BeST
holidaymaker types +
SINUS milieus

10 source markets

> 170
Tourist
destinations

Online survey
Field work: Oct. till Dec. 25



DESTINATION BRAND 25

Presentation of selected key results for cities + metropolitan regions from all 10 source markets

Demand-side conditions

General interest in „taking a city break“

Question:

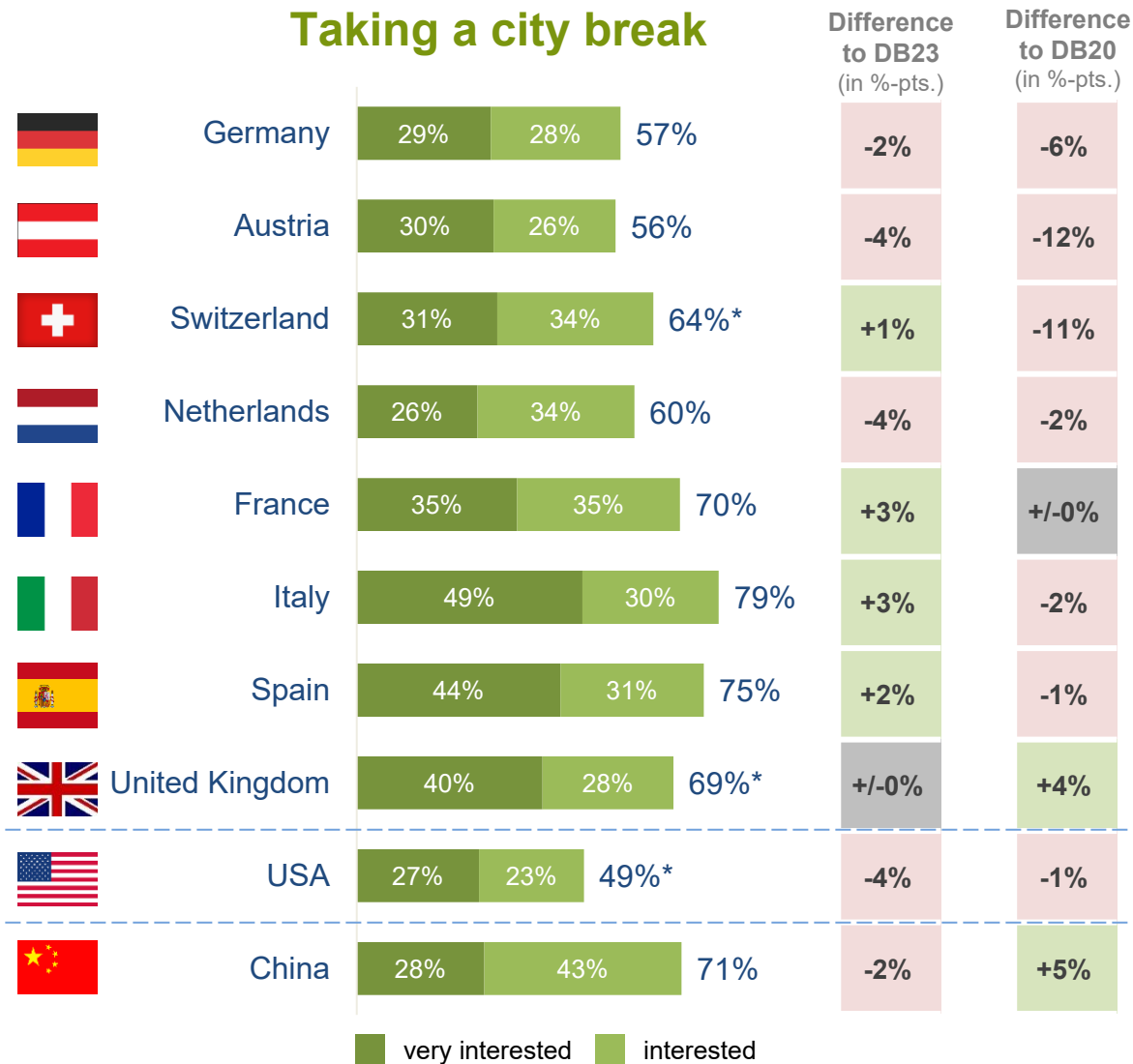
How interested are you in pursuing the following touristic holiday activities in your holiday with at least one overnight stay?

„Taking a city break“

General interest in holiday activity „taking a city break“:

Comparison of all 10 source markets

Taking a city break



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

General interest potential – all 10 DB source markets

Ranking of the considered holiday activities with regard to the general interest potential											
Base of comparison: Ranking of the holiday activities											
1											Relaxation
2											Nature
3											Being by the water
4											Swimming / beach
5											Regional products / enjoying regional cuisine
6											Active in nature
7											Culinary
8											City break
9											Gardens / parks
10											Water-based holiday activities
11											(Small) city flair
12											Castles
13											Castles / gardens
14											Nature / dark sky star parks
15											Christmas markets
19											Shopping
22											City break with active recreation
23											Culture
27											Lively places
29											Events

Focus of comparison:
City trip themes
City break, (Small) city flair, Shopping,
City break with active recreation, Culture,
Lively places, Events

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

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

General interest potential – all 10 DB source markets

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4											Swimming / beach
5											Regional products / enjoying regional cuisine
6											Active in nature
7											Culinary
8		8	2	2	3	1	1	2	26	24	City break
9											Gardens / parks
10											Water-based holiday activities
11		12	7	12	6	8	6	10	13	11	(Small) city flair
12											Castles
13											Castles / gardens
14											Nature / dark sky star parks
15											Christmas markets
19		22	19	13	34	30	32	26	20	20	Shopping
22		19	20	25	21	34	38	36	40	35	City break with active recreation
23		24	22	19	11	20	10	17	12	27	Culture
27		29	27	41	29	27	29	27	23	14	Lively places
29		34	32	39	30	28	33	33	29	38	Events

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

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

General interest potential – all 10 DB source markets

Ranking of the considered holiday activities with regard to the general interest potential										
Base of comparison: Ranking of the holiday activities										
DE	AT	CH	HU	FR	IT	ES	UK	US	CN	
										Relaxation
										Nature
										Being by the water
										Swimming / beach
										Regional products / enjoying regional cuisine
										Active in nature
										Culinary
57%	56%	64%	60%	70%	79%	75%	69%	49%	71%	City break
										Gardens / parks
										Water-based holiday activities
52%	49%	58%	43%	63%	67%	66%	57%	54%	75%	(Small) city flair
										Castles
										Castles / gardens
										Nature / dark sky star parks
										Christmas markets
45%	41%	44%	43%	40%	48%	41%	45%	52%	72%	Shopping
44%	44%	42%	32%	48%	43%	37%	37%	40%	66%	City break with active recreation
41%	37%	42%	36%	59%	56%	62%	51%	55%	69%	Culture
38%	35%	38%	25%	44%	51%	47%	44%	50%	74%	Lively places
37%	33%	36%	26%	44%	51%	40%	39%	48%	64%	Events

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

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

General interest potential – all 10 DB source markets - Development between DB20 and DB25

Ranking of the considered holiday activities with regard to the general interest potential											
Base of comparison: Ranking of the holiday activities											
DE	AT	CH	HU	FR	IT	ES	UK	US	CN		
											Relaxation
											Nature
											Being by the water
											Swimming / beach
											Regional products / enjoying regional cuisine
											Active in nature
											Culinary
-6%	-12%	-11%	-2%	+/-0%	-2%	-1%	+4%	-1%	+5%		City break
											Gardens / parks
											Water-based holiday activities
---	---	---	---	---	---	---	---	---	---		(Small) city flair
											Castles
											Castles / gardens
											Nature / dark sky star parks
											Christmas markets
+5%	+/-0%	-7%	-2%	+6%	+7%	-3%	+8%	+6%	+7%		Shopping
---	---	---	---	---	---	---	---	---	---		City break with active recreation
-7%	-17%	-18%	-8%	-5%	-6%	-5%	-5%	+/-0%	+3%		Culture
-3%	-7%	-14%	-5%	+/-0%	+1%	-7%	+1%	-1%	+2%		Lively places
+2%	-6%	-12%	-4%	-2%	+5%	-4%	+3%	+3%	+4%		Events

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

Source: inspektour (international) GmbH / DI Tourismusforschung of the FH Westküste, 2020; inspektour (international) GmbH, 2025

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

General intention of “city break enthusiasts” to travel abroad

Question (short form):

Do you intend to take a holiday abroad
in the next 12 months / three years?

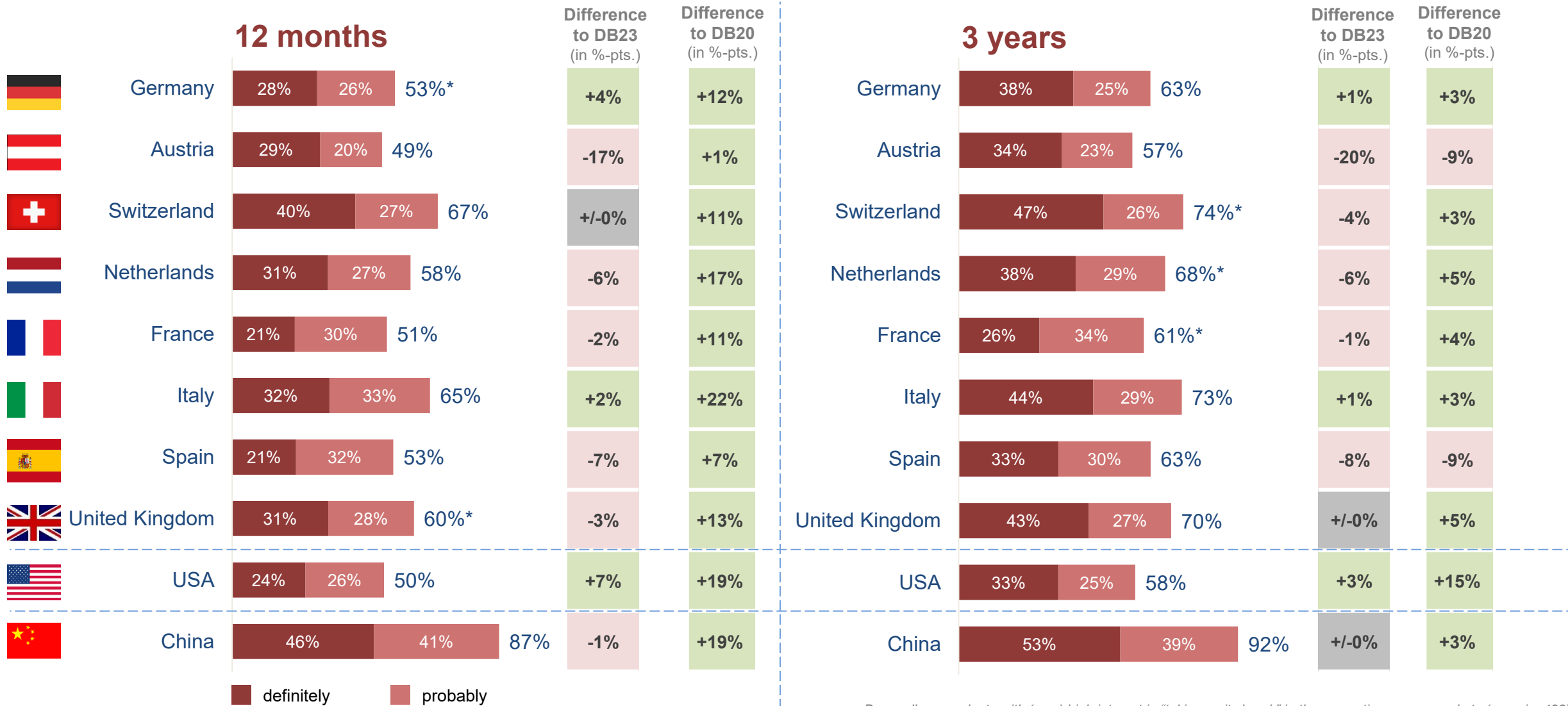
Intention for:

Short trips (with 1-3 overnight stays)

Longer holiday trips (with 4 or more overnight stays)

General intention of city break enthusiasts to travel abroad for short trips

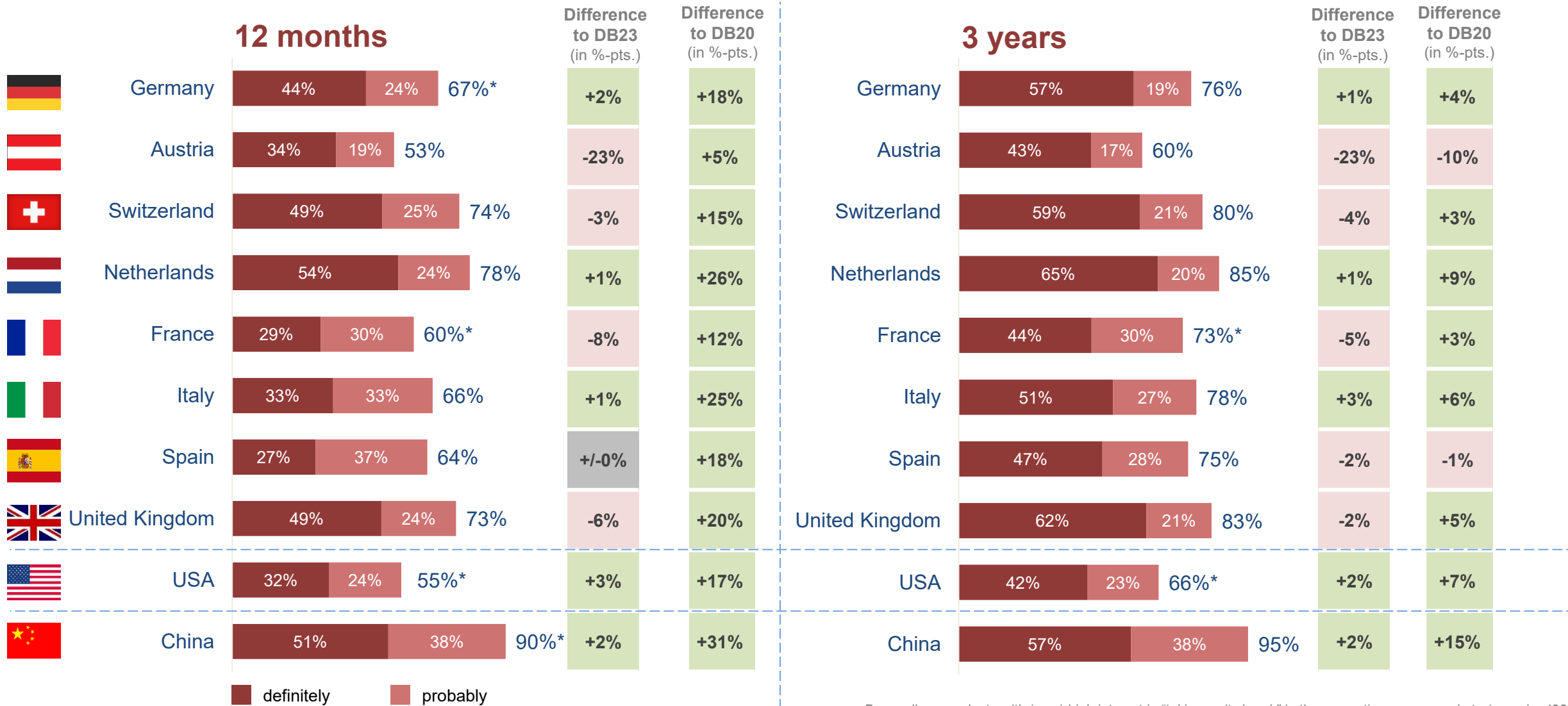
(Comparison within the next 12 months / 3 years)



Base: all respondents with (very) high interest in "taking a city break" in the respective source markets (n = min. 493)
 Top-two-box on a scale from "4 = definitely" to "1 = definitely not"; in % of respondents
 * Possible deviations of 1% from the sum of the individual values are due to rounding.

General intention of city break enthusiasts to travel abroad **for longer holiday trips**

(Comparison within the next 12 months / 3 years)



Base: all respondents with (very) high interest in "taking a city break" in the respective source markets (n = min. 493)

Top-two-box on a scale from "4 = definitely" to "1 = definitely not"; in % of respondents

* Possible deviations of 1% from the sum of the individual values are due to rounding.

Source market comparison (all 10 DB source markets)

Awareness (“Familiarity”) of international cities

(open question)

Question (short form):

Which international tourist destinations come to your mind when you think about a holiday trip with at least one overnight stay?

Unsupported awareness of international cities: TOP 5-Ranking per source market

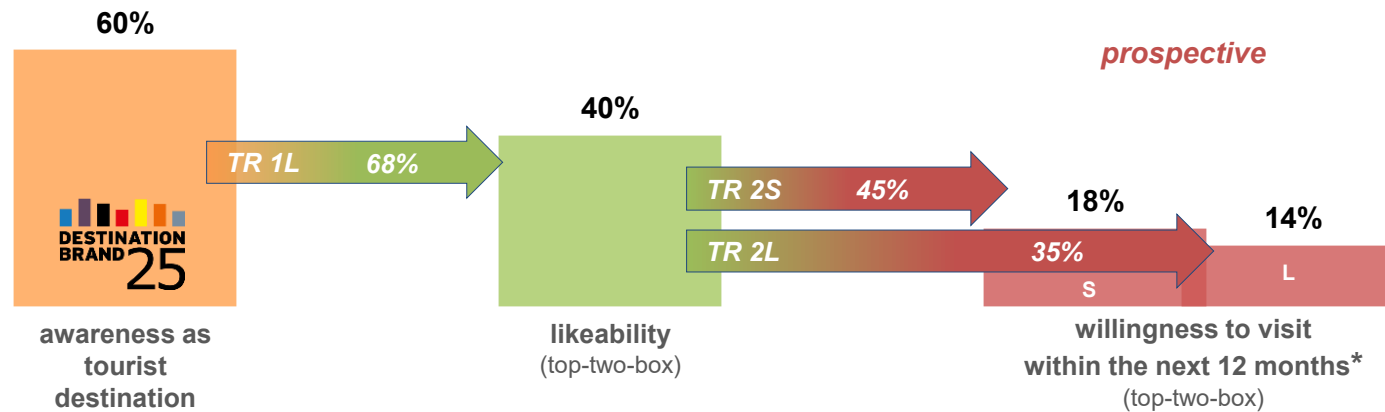
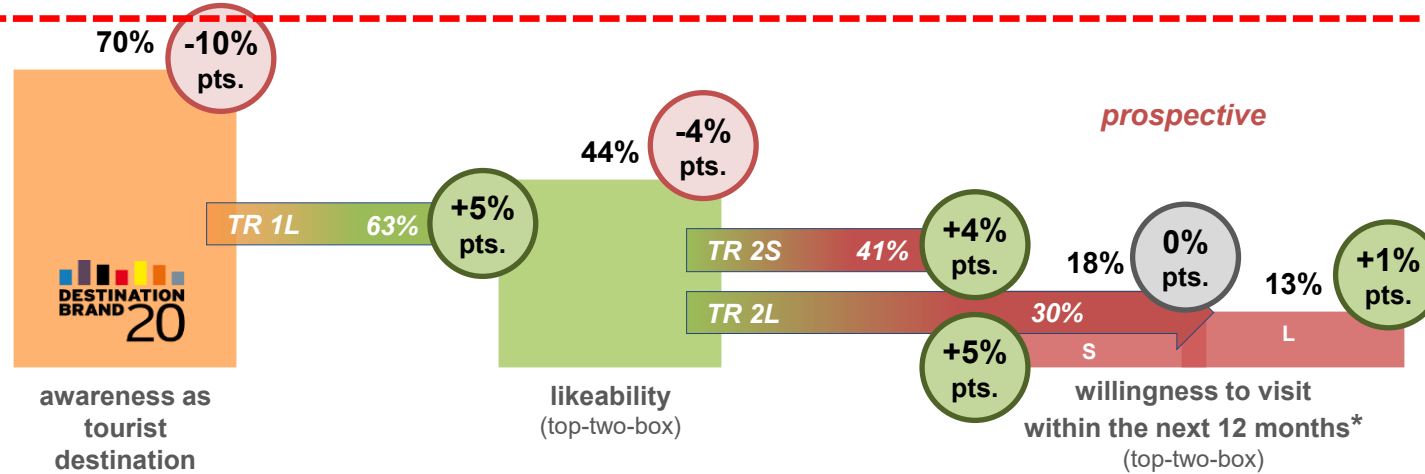
	DE	AT	CH	NL	FR	IT	ES	UK	US	CN
Paris	1	1	1	1		1	1	1	1	2
London	2	2	2	2	1	2	2		2	
Rome	3	3	5		2		3	2	4	
Vienna	4					5				
Amsterdam	5							3		
Berlin		4	3	3	5		4			5
Munich		5								
Barcelona			4	4	3	3		5		
Antwerp				5						
New York					4			4		
Madrid						4				
Lisbon							5			
Dubai									3	3
Tokyo									5	4
Singapore										1

Source market Germany:
BrandValue+ of city destinations
over time

Base: Brand funnel

The brand funnel – Time comparison between DB20 and DB25

Source market Germany: Comparison of average values for 42 domestic city destinations

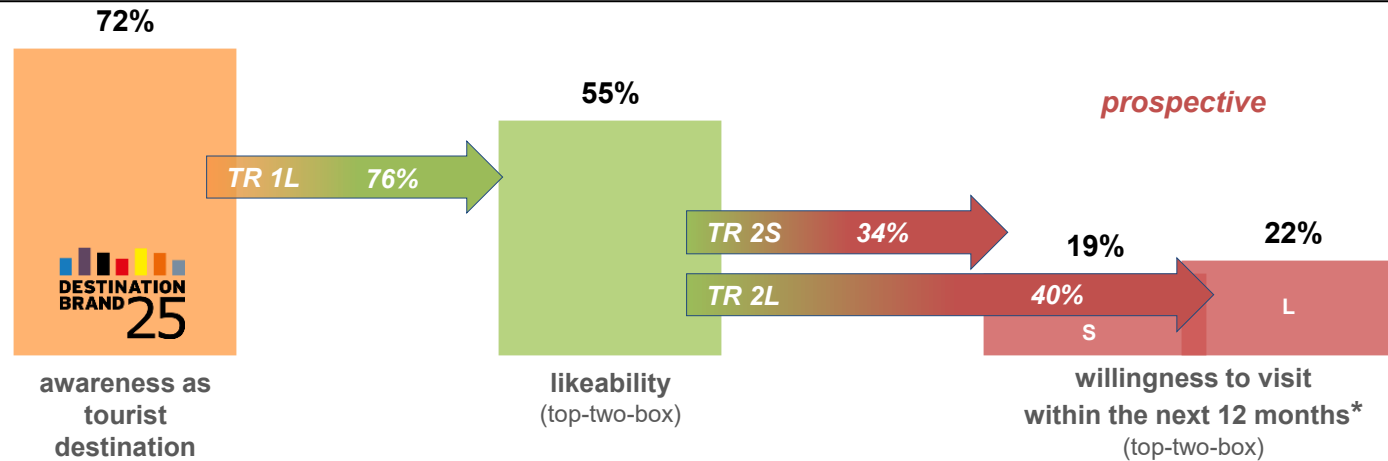
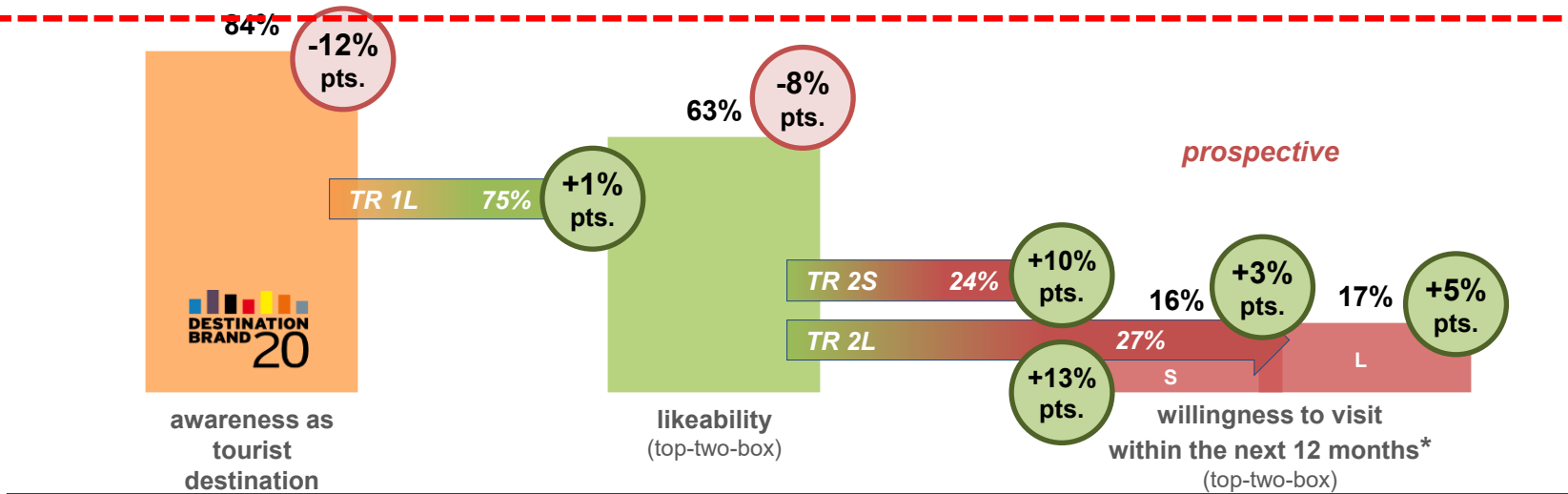


Source: inspektour (international) GmbH / DI Tourismusforschung of the FH Westküste, 2020; inspektour (international) GmbH, 2025

* S = Willingness to visit for short trips (with 1-3 overnight stays); L = Willingness to visit for longer holiday trips (with 4 or more overnight stays)

The brand funnel – Time comparison between DB20 and DB25

Source market Germany: Comparison of average values for 11 international city destinations

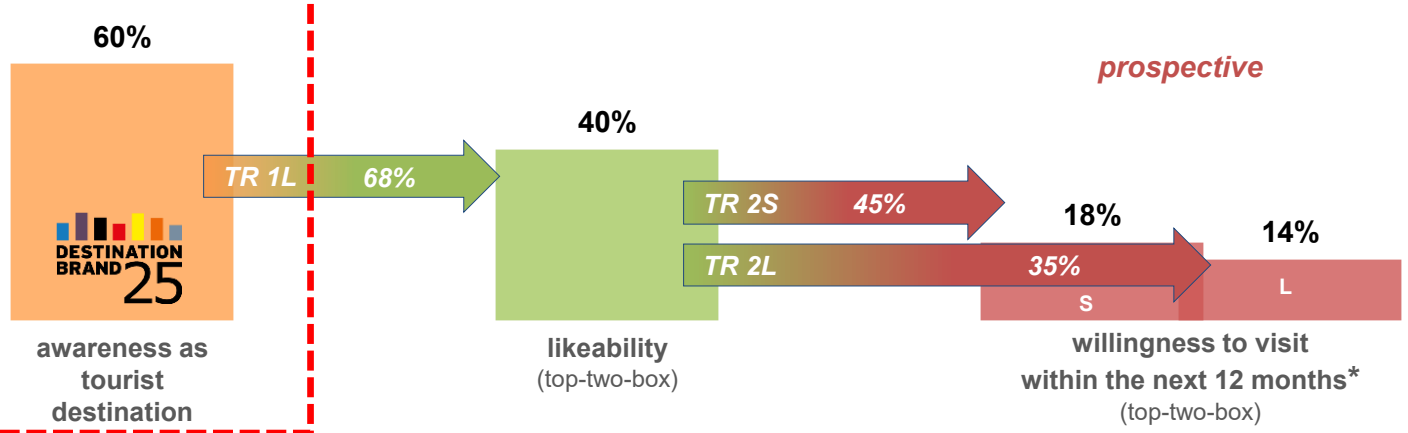
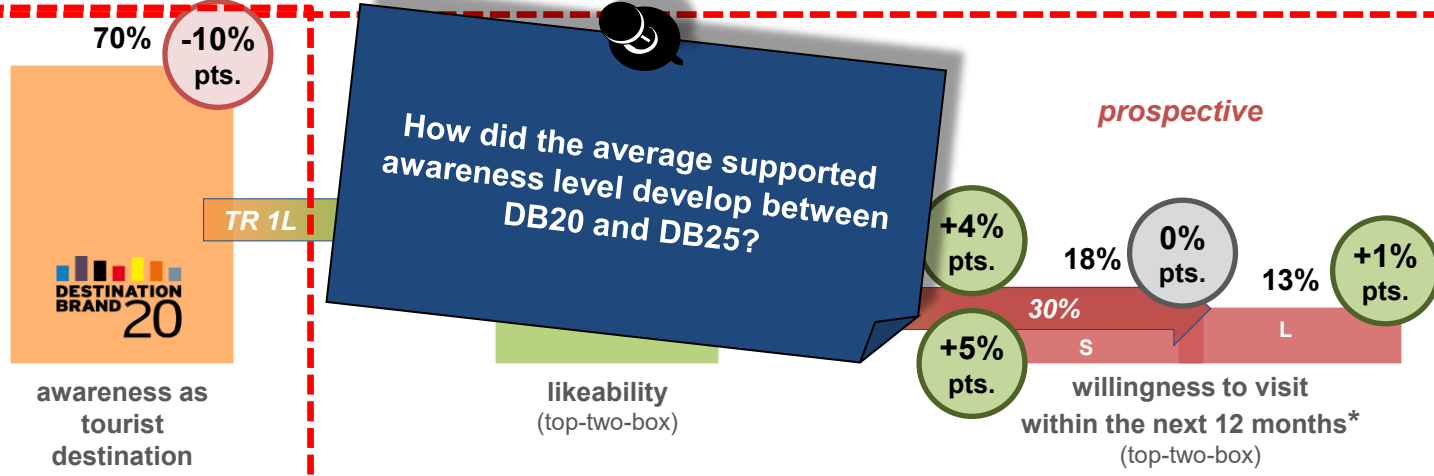


Source: inspektour (international) GmbH / DI Tourismusforschung of the FH Westküste, 2020; inspektour (international) GmbH, 2025

* S = Willingness to visit for short trips (with 1-3 overnight stays); L = Willingness to visit for longer holiday trips (with 4 or more overnight stays)

The brand funnel – Time comparison between DB20 and DB25

Source market Germany: Comparison of average values for 42 domestic city destinations



How did the average supported awareness level develop between DB20 and DB25?

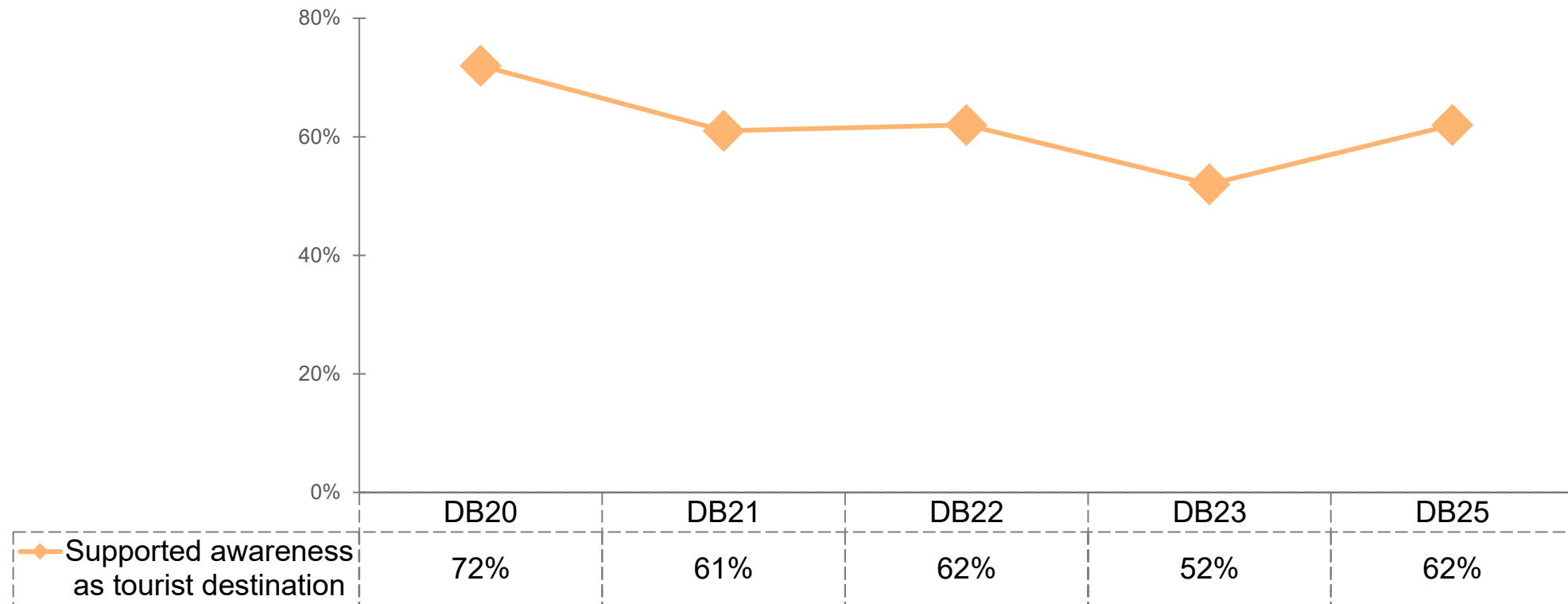


Source: inspektour (international) GmbH / DI Tourismusforschung of the FH Westküste, 2020; inspektour (international) GmbH, 2025

* S = Willingness to visit for short trips (with 1-3 overnight stays); L = Willingness to visit for longer holiday trips (with 4 or more overnight stays)

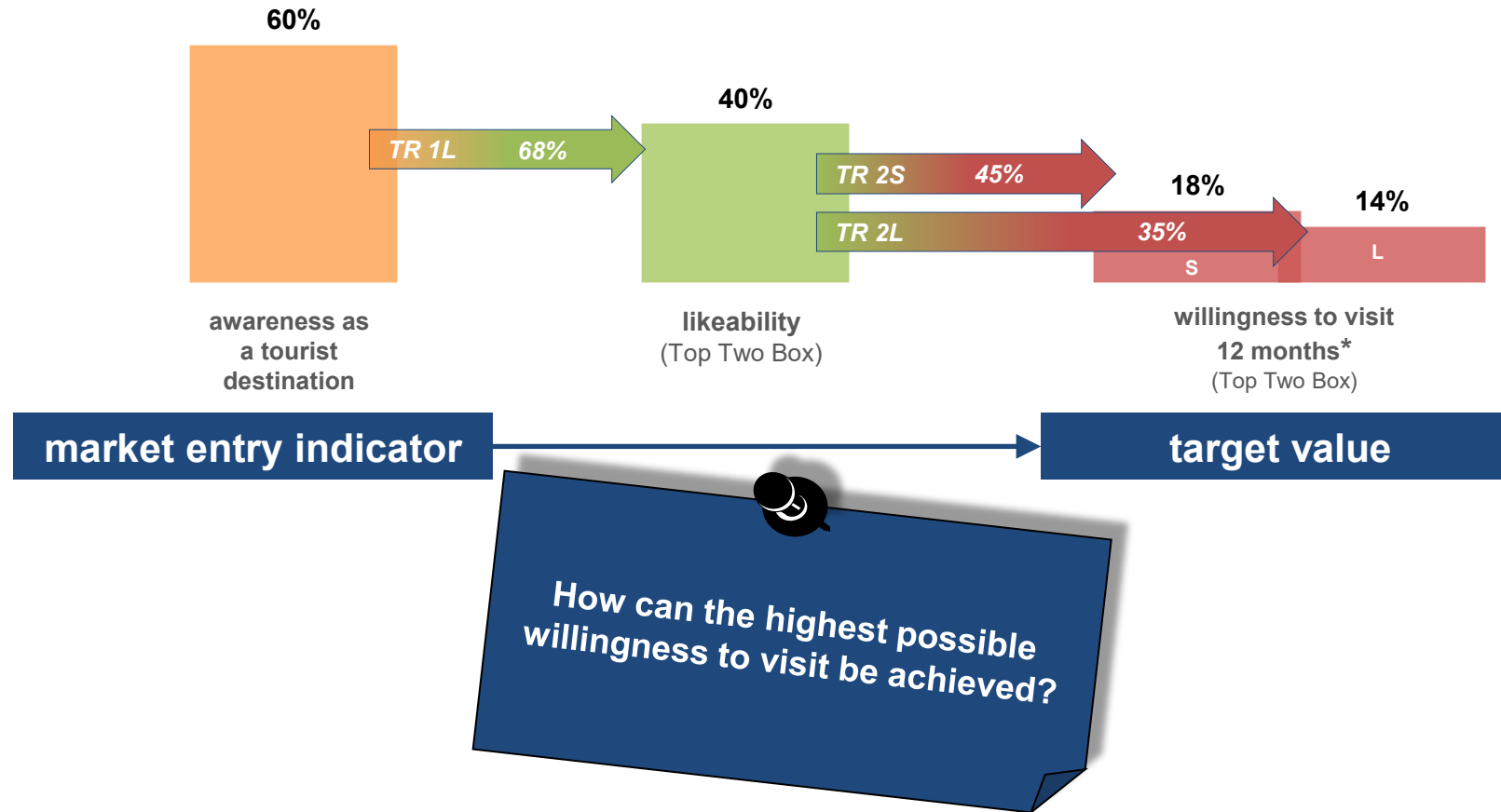
The brand funnel – Time comparison between DB20 and DB25

Source market Germany: Comparison of average values for 33 domestic city destinations, which were surveyed in all study years from DB20 to DB25



Source: inspektour (international) GmbH / DI Tourismusforschung of the FH Westküste, 2020; inspektour (international) GmbH, 2021-2023 / 2025

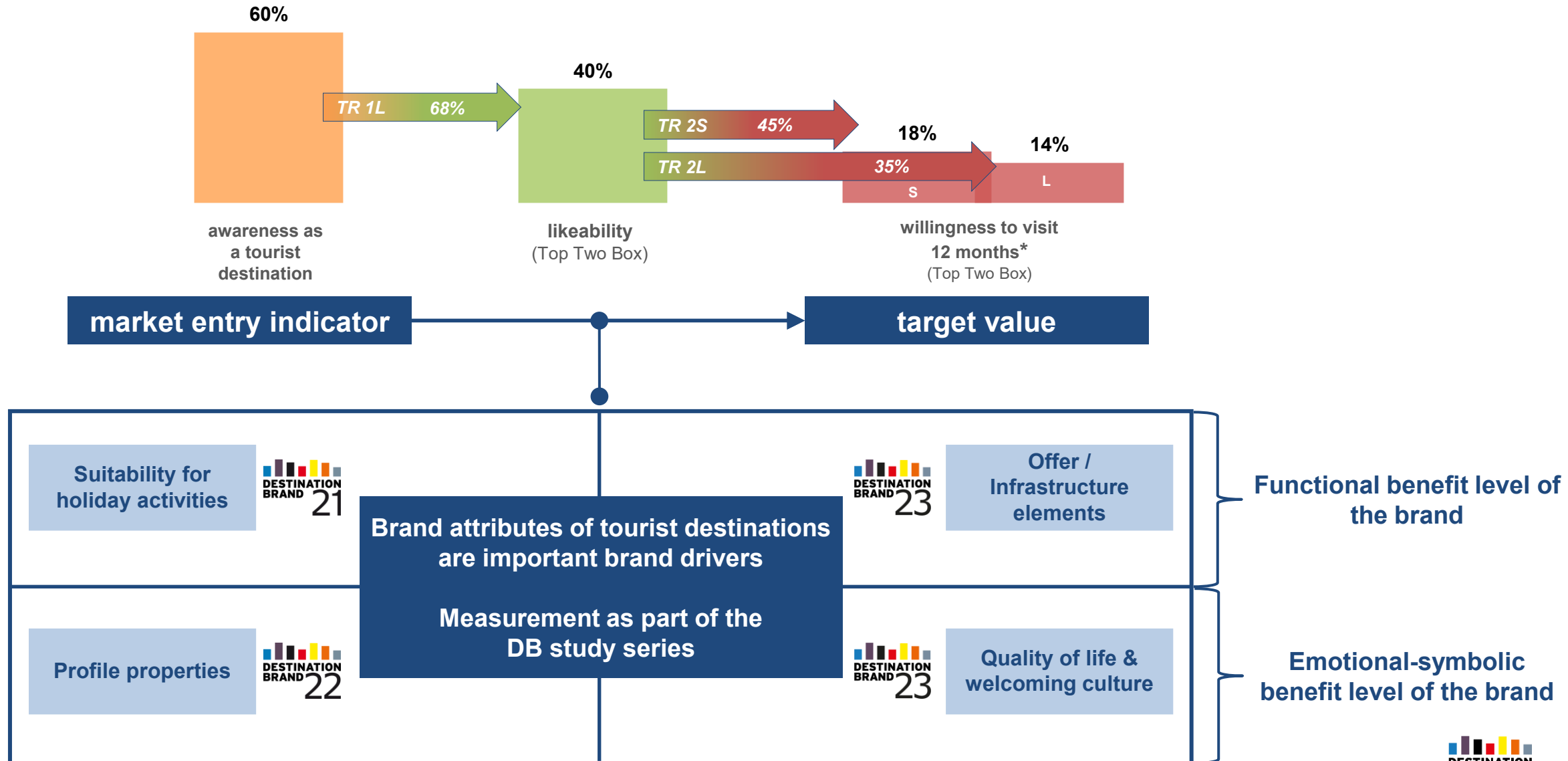
The brand funnel – Model overview



Source: inspektour (international) GmbH, 2025

* S = Willingness to visit for short breaks of 1-3 nights; L = Willingness to accept visitors for longer holiday trips of 4 nights or more

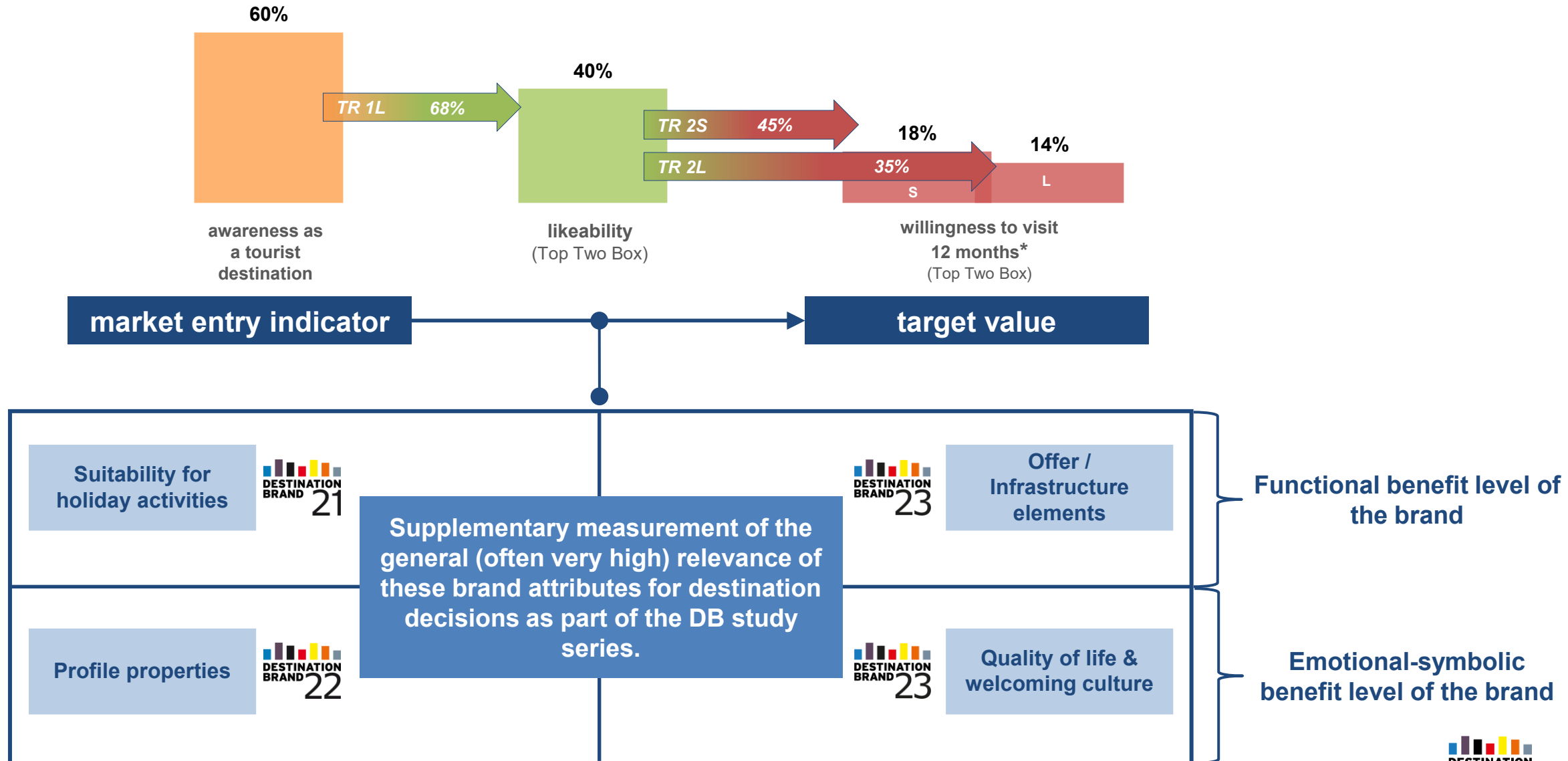
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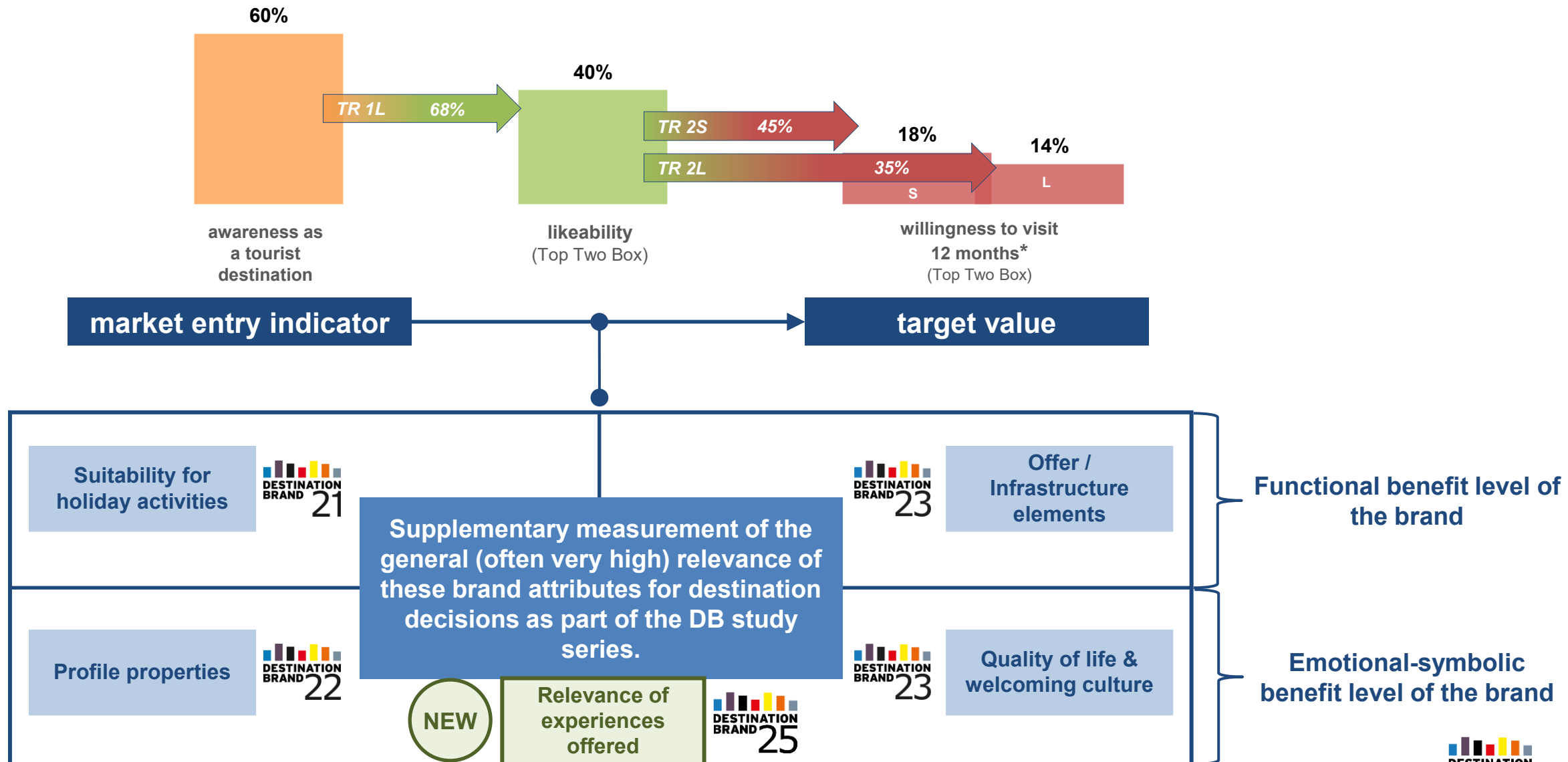
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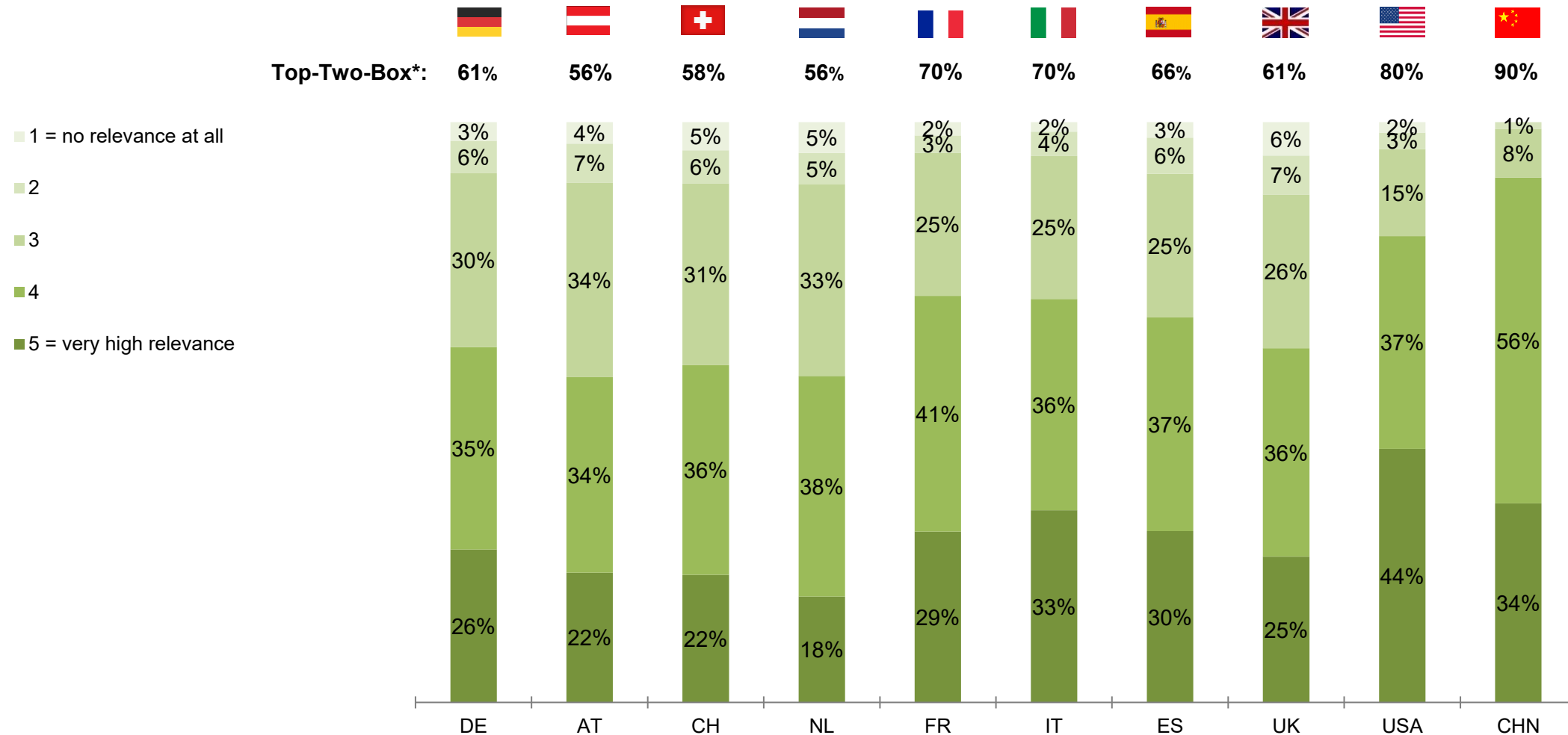
The brand funnel – Model overview



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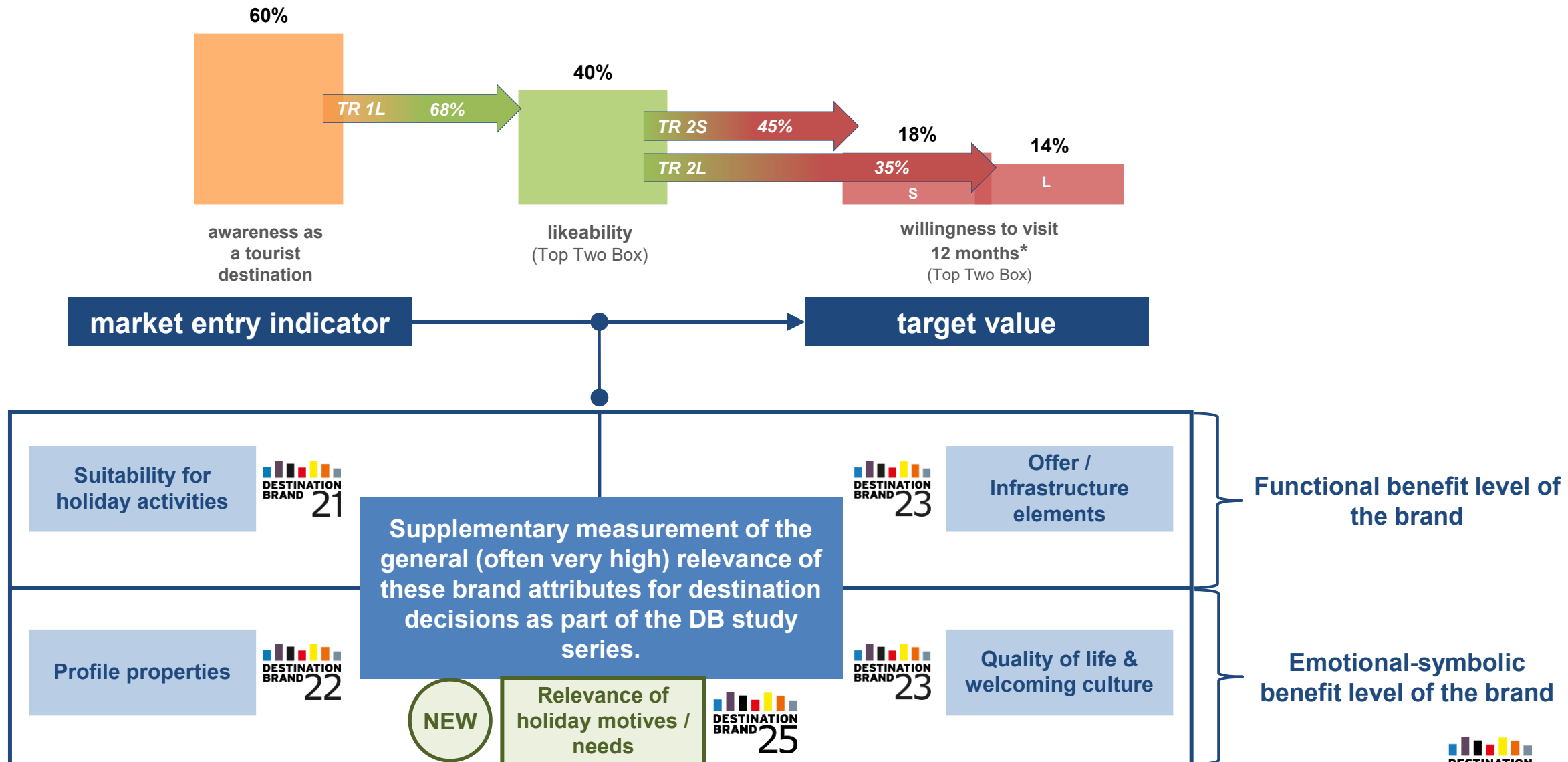
General relevance of experiences offered for destination selection of “city break enthusiasts” – source market comparison (all 10 DB source markets)



Basis: all respondents with (very) high interest in “taking a city break” in the respective source markets (n = min. 493)
Top two box on a scale from ‘5 = very high relevance’ to ‘1 = no relevance at all’; figures in % of respondents

Source: inspektour (international) GmbH, 2025

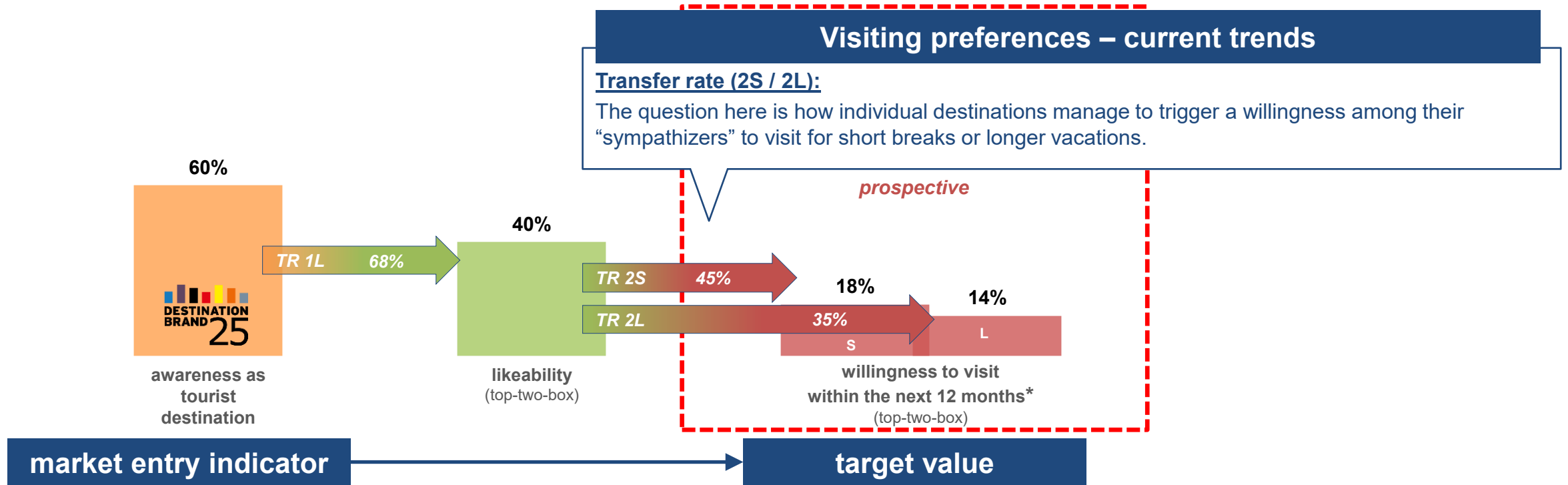
The brand funnel – Model overview



Source: inspektour (international) GmbH, 2025

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The brand funnel – Model overview



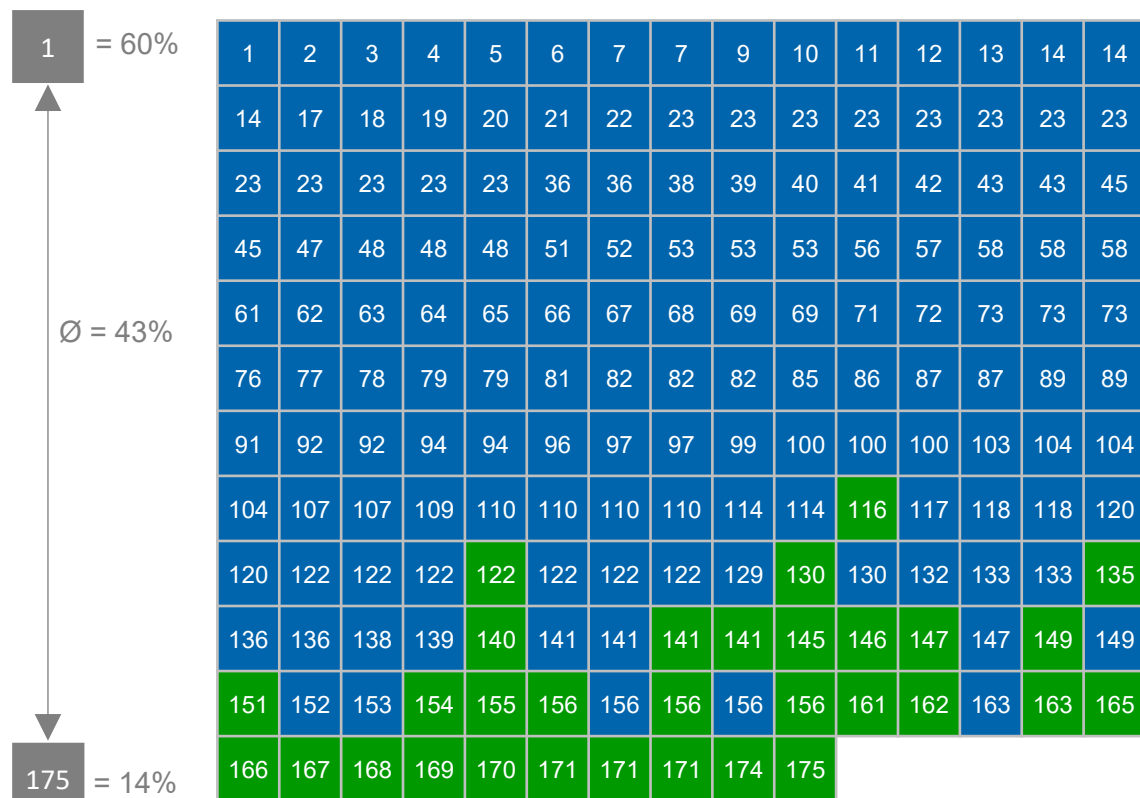
Source: inspektour (international) GmbH, 2025

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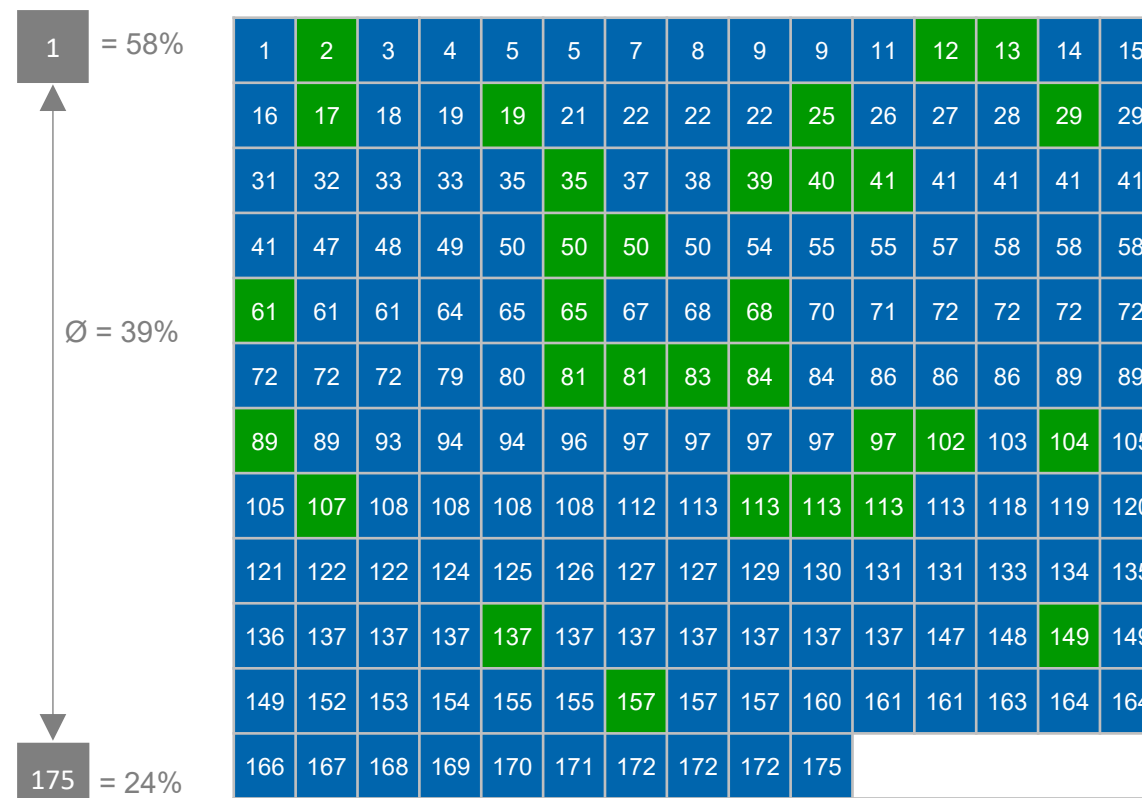
Comparison of visitor preferences Comparison by destination category

- Domestic destinations (144)
- International destinations (31)

Short break 12 months



Longer holiday 12 months

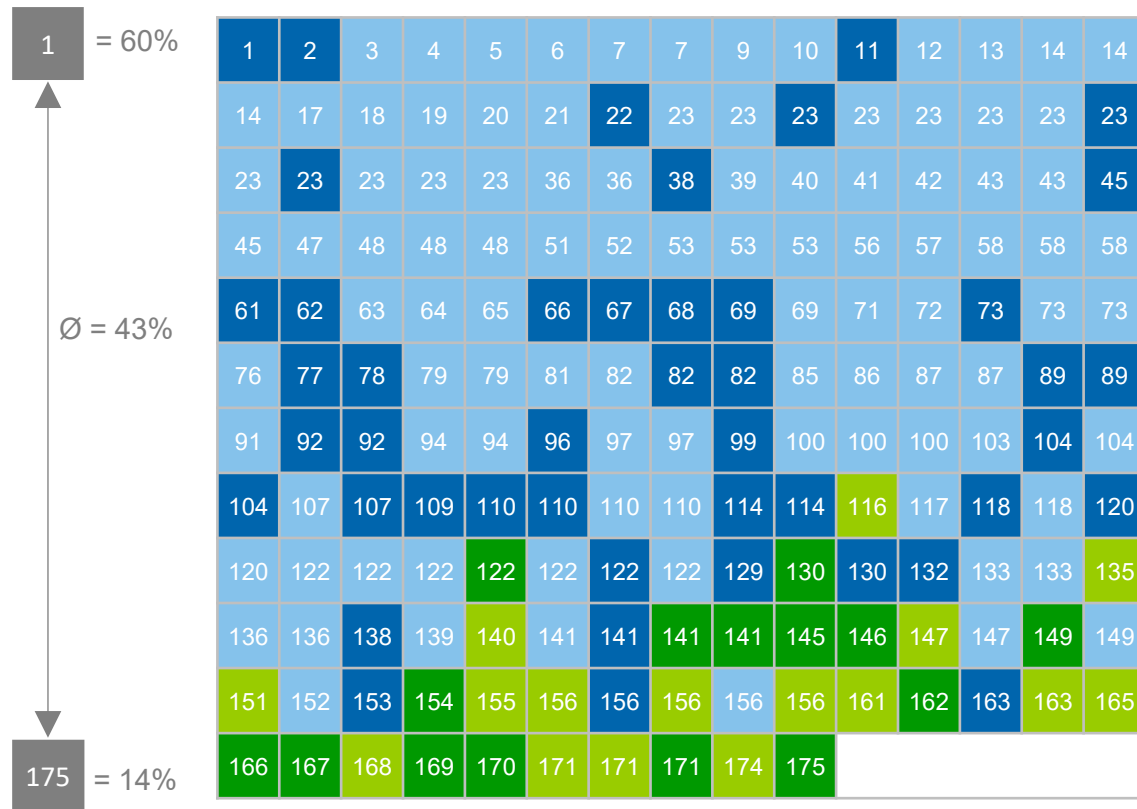


Comparison of visitor preferences

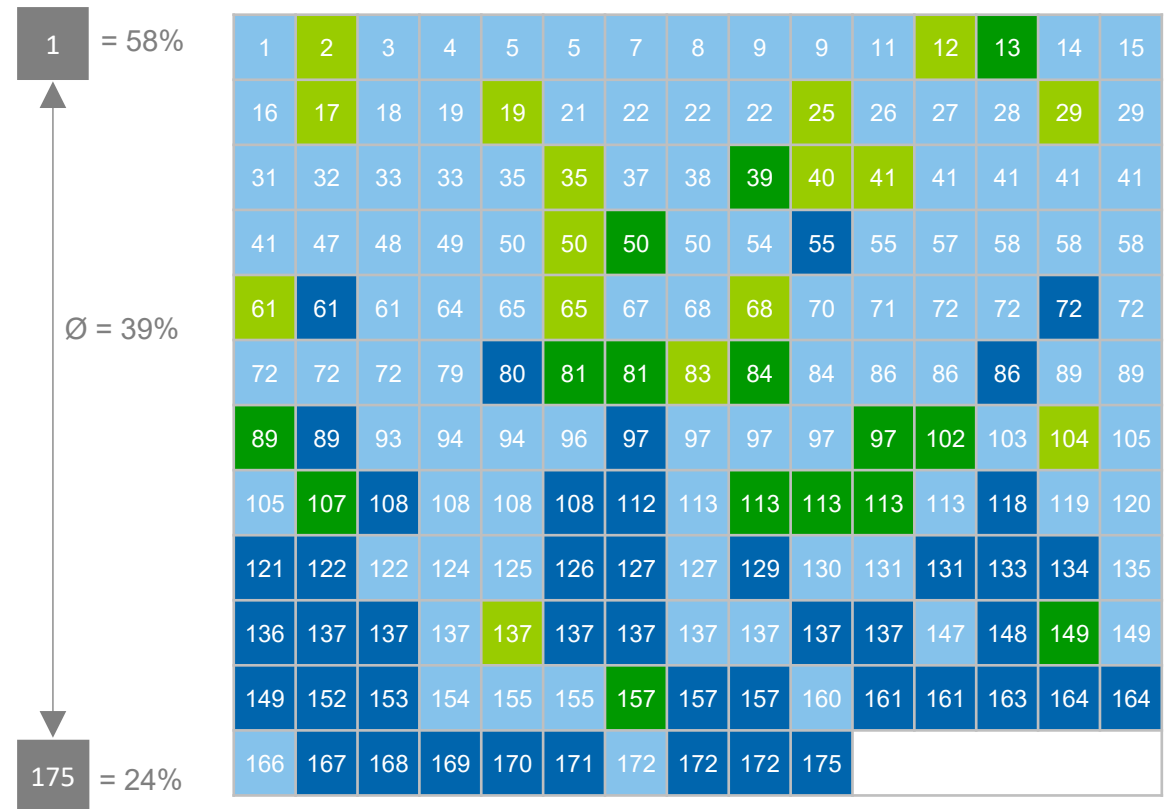
Comparison by destination category

- Domestic cities / metropolitan regions (45)
- International cities / metropolitan regions (15)
- Domestic destinations (144)
- International destinations (31)

Short break 12 months



Longer holiday 12 months



Source: inspektour (international) GmbH, 2025

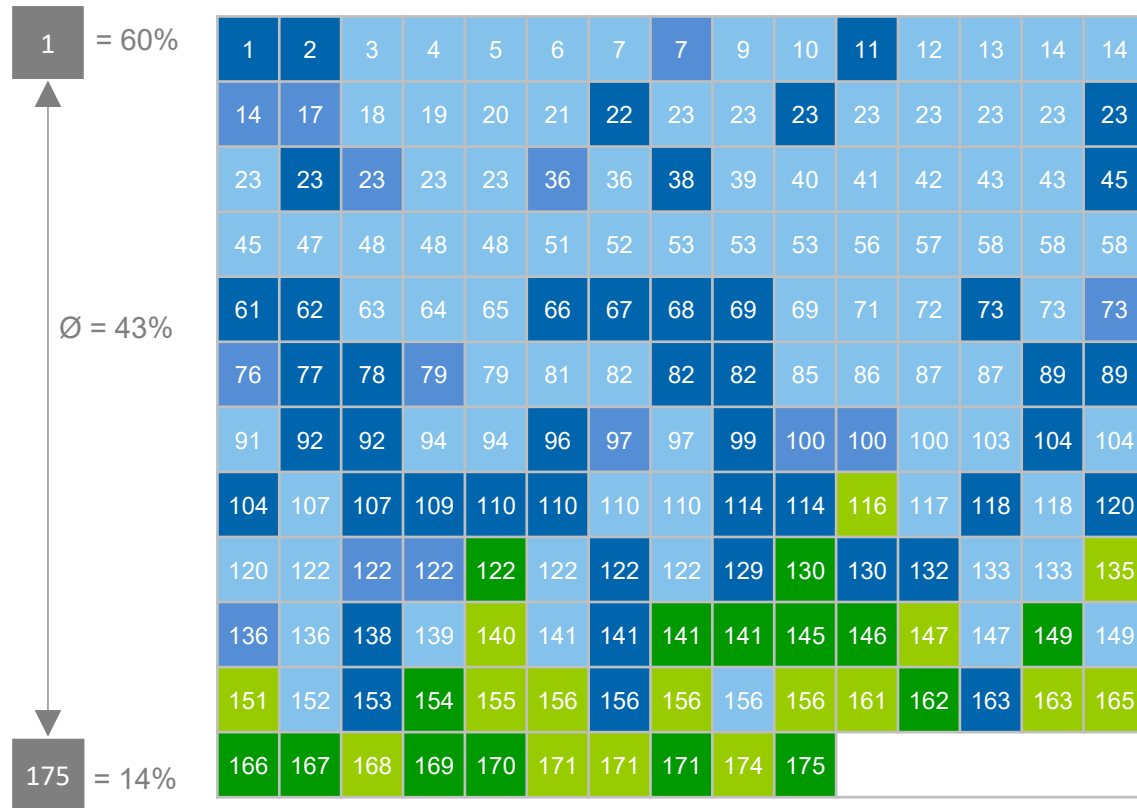
Basis: All respondents in SM Germany (n = 1,000 per destination)
Rankings based on transfer rates 2K and 2L (within the next 12 months)

Comparison of visitor preferences

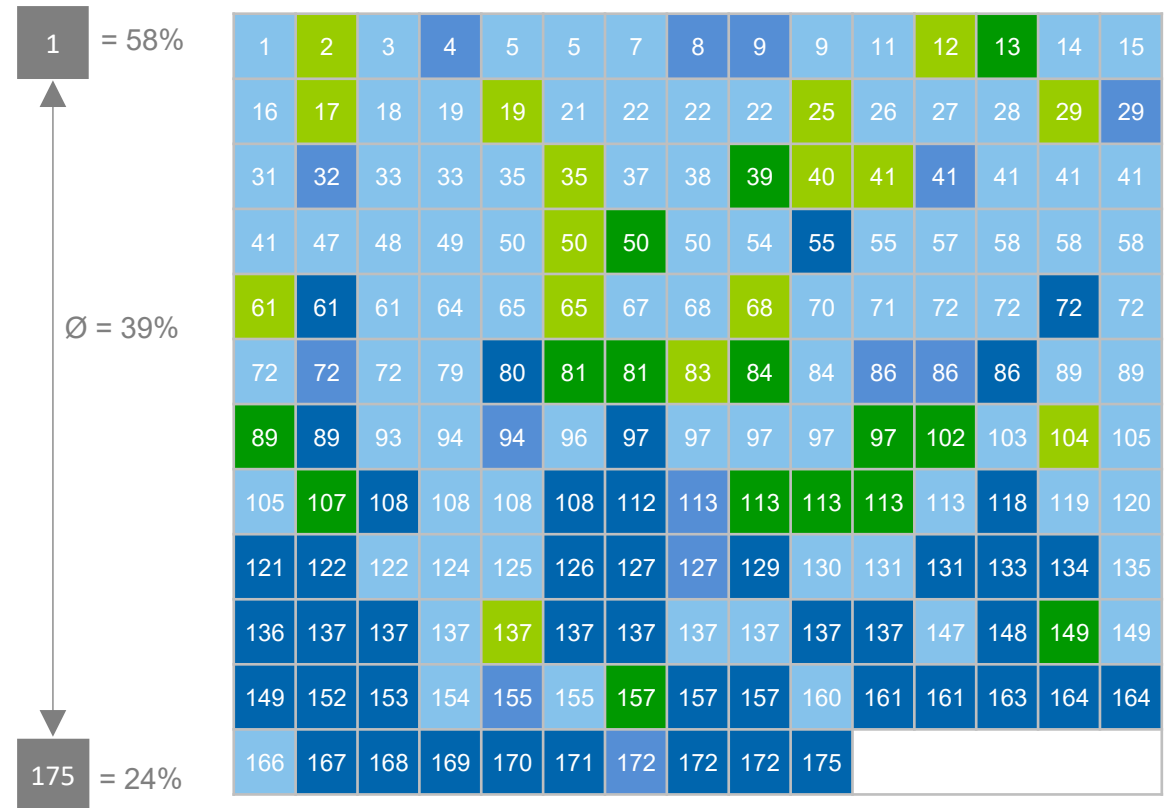
Comparison by destination category

- Domestic cities / metropolitan regions (45)
- SMALL domestic cities / metropolitan regions (14)
- International cities / metropolitan regions (15)
- Domestic destinations (144)
- International destinations (31)

Short break 12 months



Longer holiday 12 months



Source: inspektour (international) GmbH, 2025

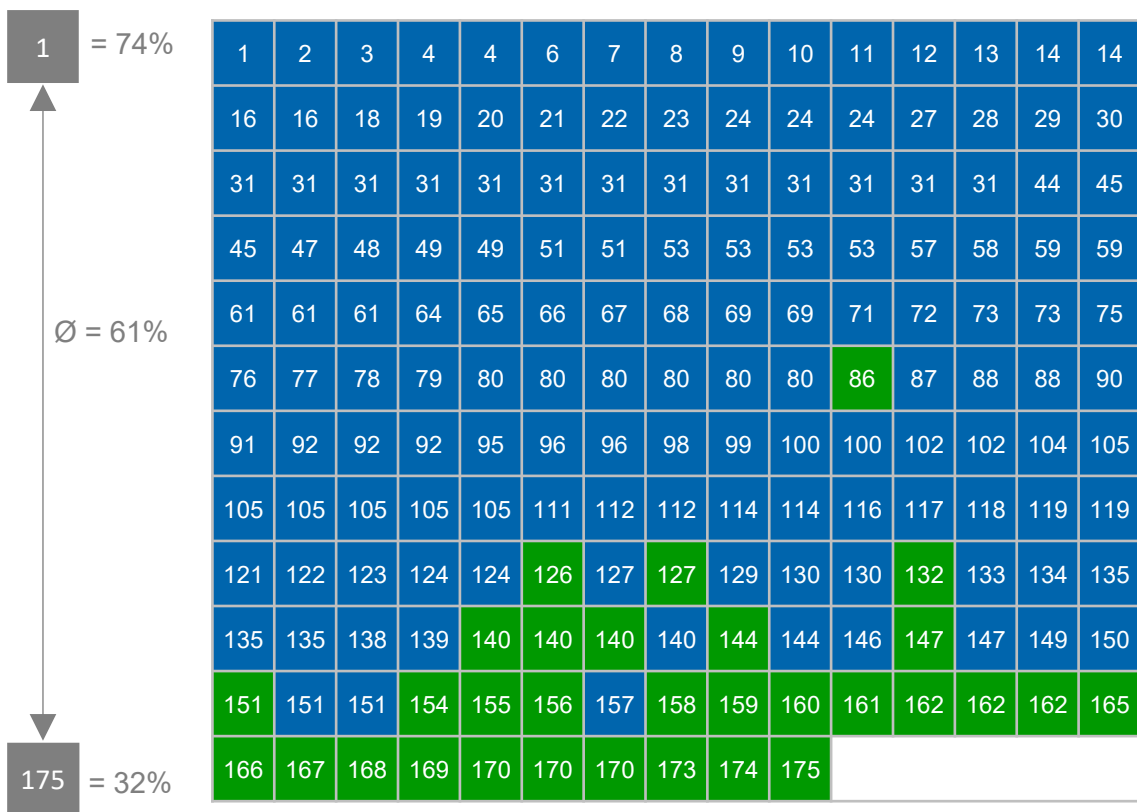
Basis: All respondents in SM Germany (n = 1,000 per destination)
Rankings based on transfer rates 2K and 2L (within the next 12 months)

Comparison of visitor preferences

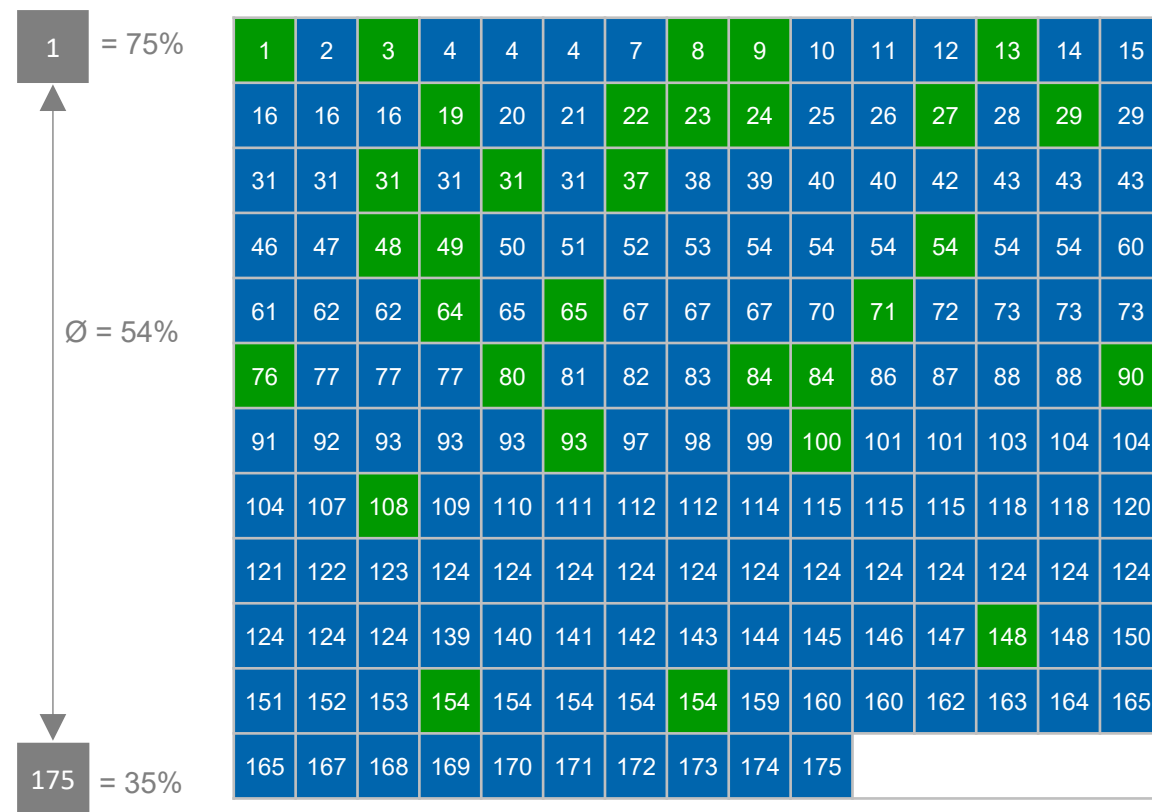
Comparison by destination category

- Domestic destinations (144)
- International destinations (31)

Short break 3 years



Longer holiday 3 years



Source: inspektour (international) GmbH, 2025

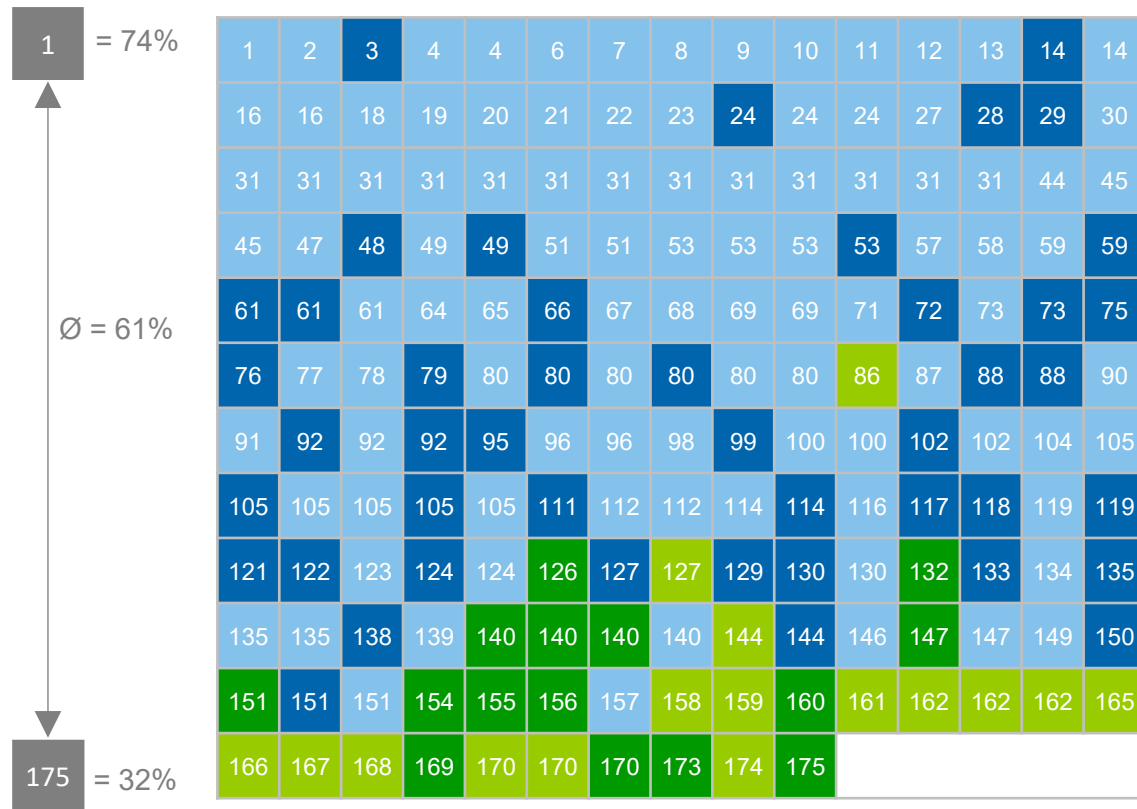
Basis: All respondents in SM Germany (n = 1,000 per destination)
Rankings based on transfer rates 2K and 2L (within the next 3 years)

Comparison of visitor preferences

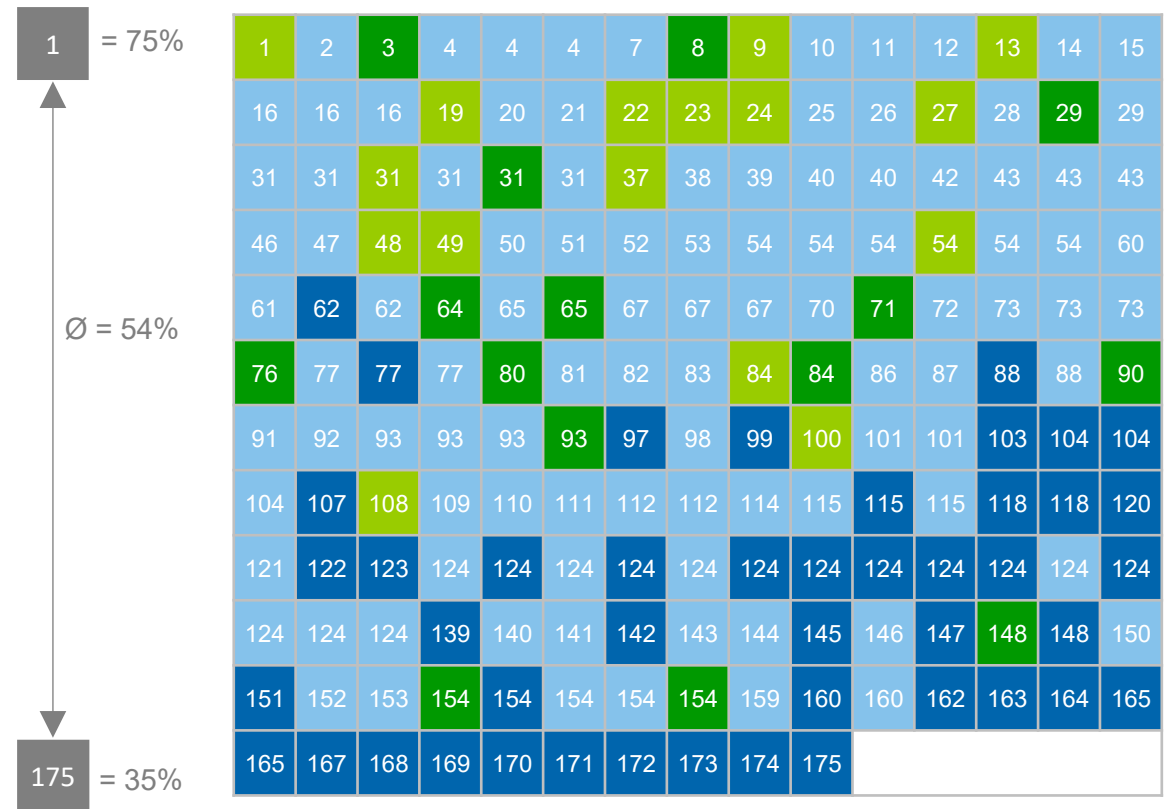
Comparison by destination category

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- International cities / metropolitan regions (15)
- Domestic destinations (144)
- International destinations (31)

Short break 3 years



Longer holiday 3 years



Source: inspektour (international) GmbH, 2025

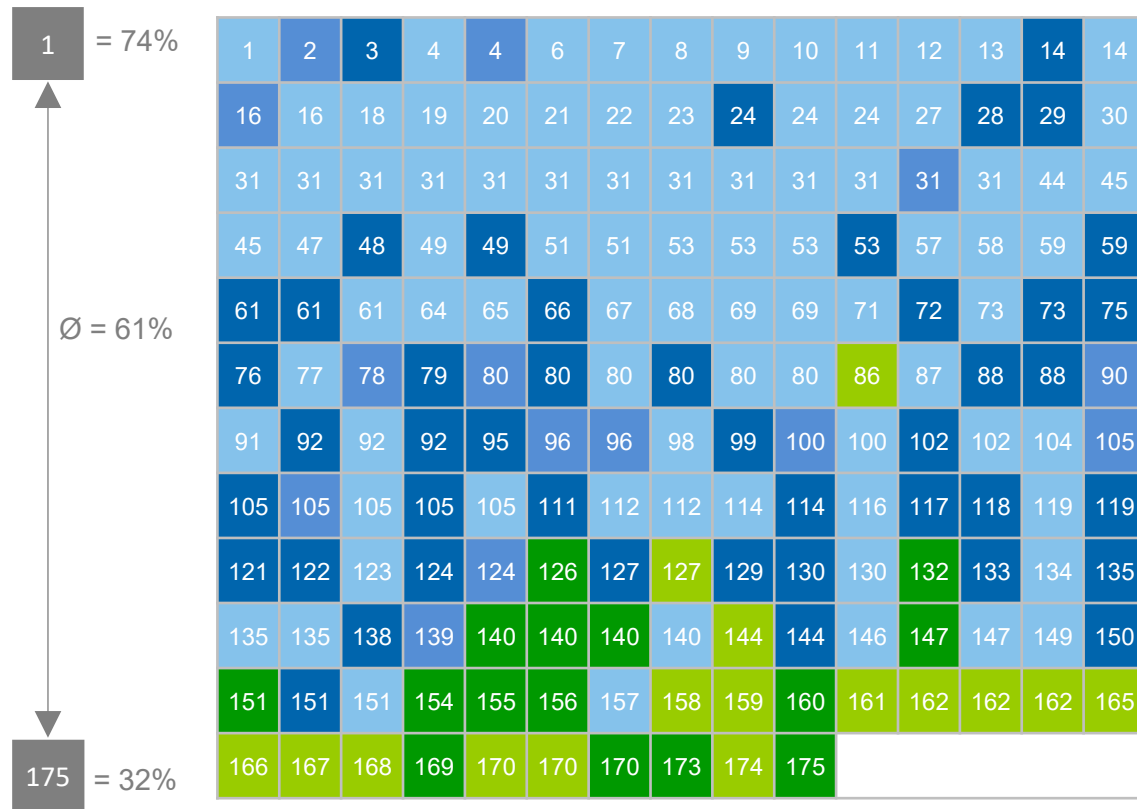
Basis: All respondents in SM Germany (n = 1,000 per destination)
Rankings based on transfer rates 2K and 2L (within the next 3 years)

Comparison of visitor preferences

Comparison by destination category

- Domestic cities / metropolitan regions (45)
- SMALL domestic cities / metropolitan regions (14)
- International cities / metropolitan regions (15)
- Domestic destinations (144)
- International destinations (31)

Short break 3 years



Longer holiday 3 years



Source: inspektour (international) GmbH, 2025

Basis: All respondents in SM Germany (n = 1,000 per destination)
Rankings based on transfer rates 2K and 2L (within the next 3 years)

Further Destination Brand 25 webinars

Further DB25 webinars after
ITB Berlin

SAVE THE DATE – our next DB25 webinar:

 **10 March 2026 at 11 a.m. CET**

The BrandValue+ of low mountain ranges and mountain landscapes

Language: German

 [Further information and free registration](#)

 **17 March 2026 at 11 a.m. CET**

The BrandValue+ of coastal destinations and lake landscapes

Language: German

 [Further information and free registration](#)

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