



DESTINATION BRAND 25

The BrandValue+ of tourist destinations:
Presentation of first 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 initial selected key findings 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



Presentation of selected key results from all 10 source markets

Demand-side conditions

General intention to travel abroad

Question (short form):

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

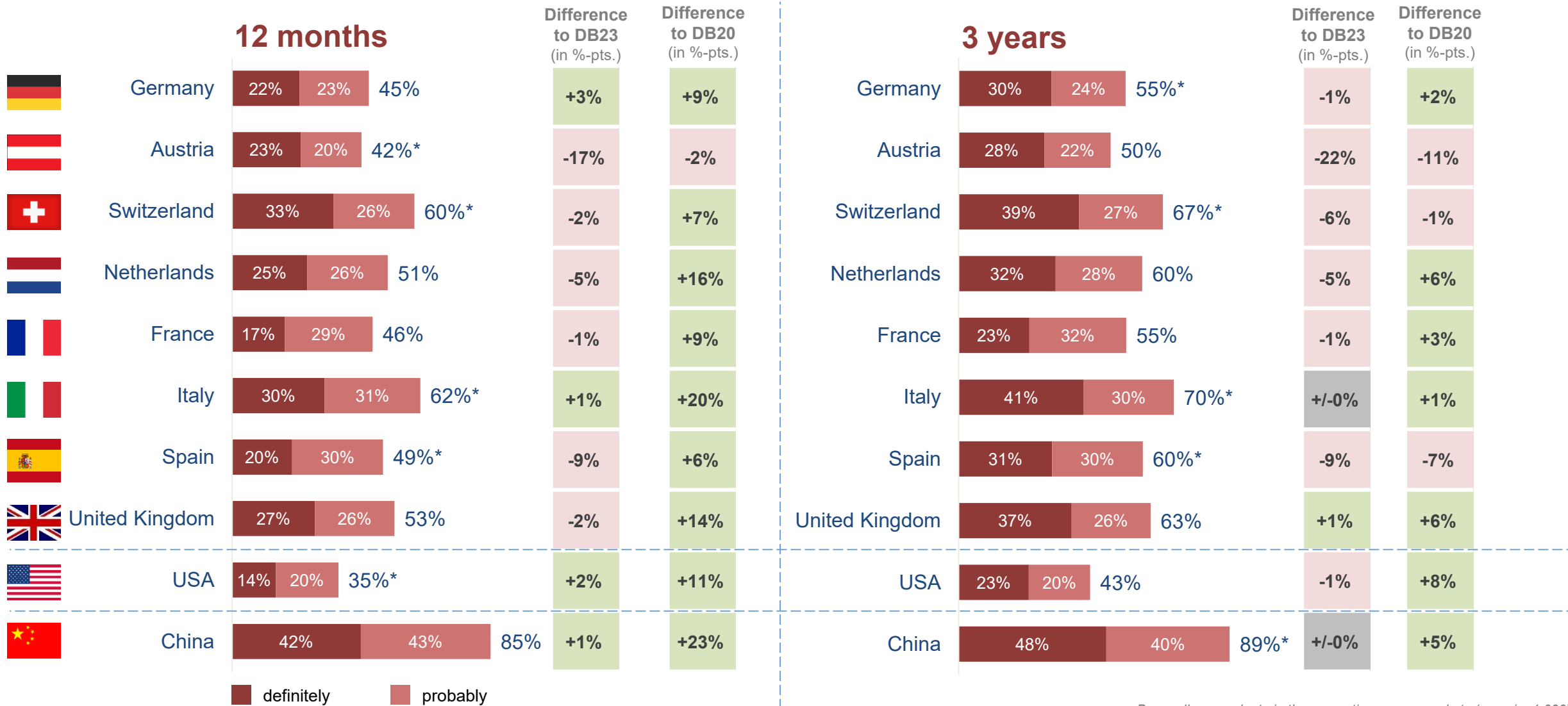
Intention for:

Short trips (with 1-3 overnight stays)

Longer holiday trips (with 4 or more overnight stays)

General intention to travel abroad for short trips

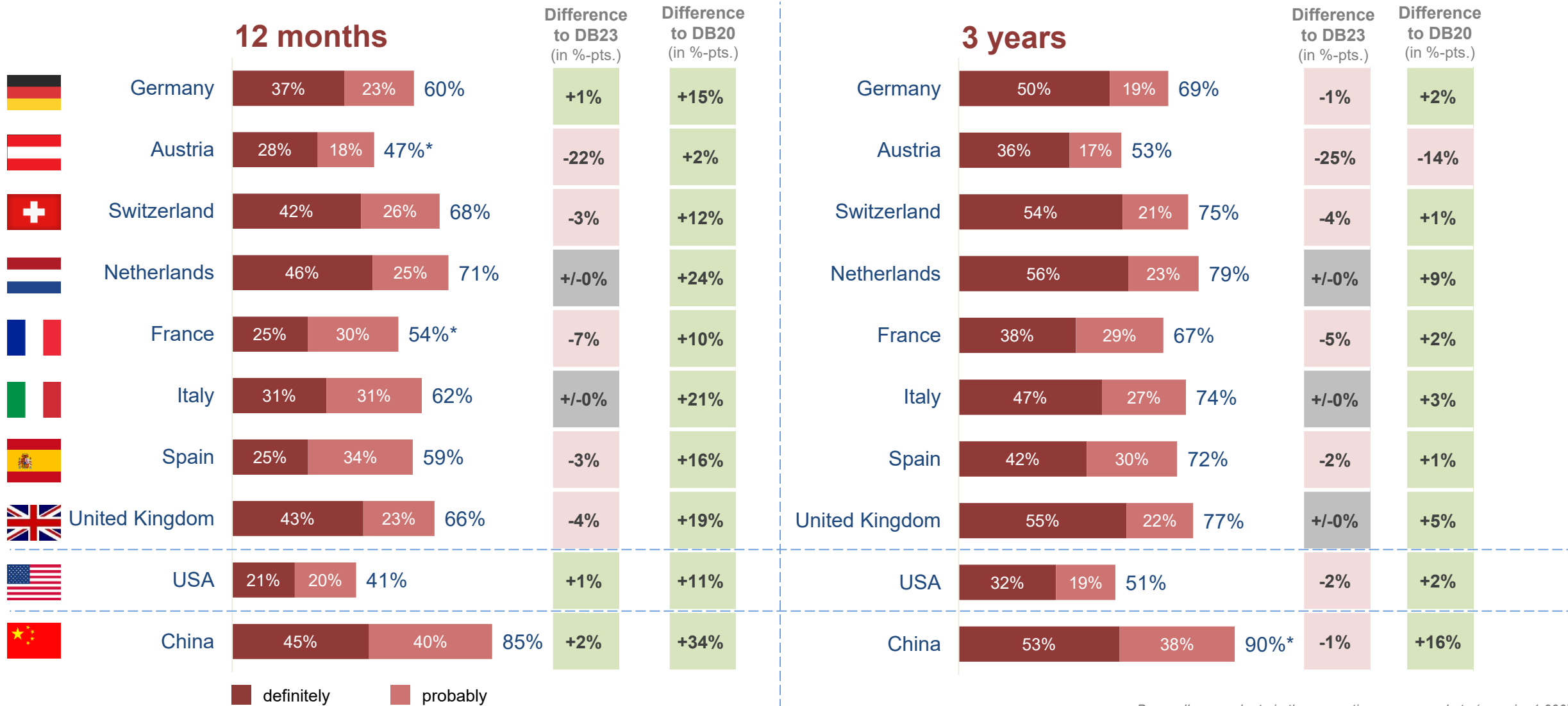
(Comparison within the next 12 months / 3 years)



Base: all respondents in the respective source markets (n = min. 1,000)
 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 to travel abroad for longer holiday trips

(Comparison within the next 12 months / 3 years)



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

Question (short form):

**How interested are you in pursuing
the following touristic holiday activities
as part of your holiday trip with at least one overnight stay?**

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											
75%											Relaxation
67%											Nature
64%											Being by the water
64%											Swimming / beach
61%											Regional products / enjoying regional cuisine
61%											Active in nature
61%											Culinary
57%											City break
53%											Gardens / parks
53%											Water-based holiday activities
52%											(Small) city flair
52%											Castles
50%											Castles / gardens
50%											Nature / dark sky star parks
49%											Christmas markets

Source: inspektour (international) GmbH, 2025

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											
											
-3%											Relaxation
-8%											Nature
---											Being by the water
-2%											Swimming / beach
---											Regional products / enjoying regional cuisine
---											Active in nature
-10%											Culinary
-6%											City break
-6%											Gardens / parks
---											Water-based holiday activities
---											(Small) city flair
---											Castles
-8%											Castles / gardens
---											Nature / dark sky star parks
---											Christmas markets

Source: inspektour (international) GmbH, 2025

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

DESTINATION BRAND 25

1	1	1	1	1				1	1		Relaxation
2										1	Nature
3											Being by the water
4											Swimming / beach
5											Regional products / enjoying regional cuisine
6											Active in nature
7					1						Culinary
8						1	1				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

Source: inspektour (international) GmbH, 2023

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											
											
											
75%	72%	73%	73%					74%	73%		
											Relaxation
2										80%	Nature
3											Being by the water
4											Swimming / beach
5											Regional products / enjoying regional cuisine
6											Active in nature
7					71%						Culinary
8						79%	75%				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

Source: inspektour (international) GmbH, 2023

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	NL	FR	IT	ES	UK	US	CN	
-3%	-5%	-7%	-2%				+2%	+/-0%		Relaxation
2									-2%	Nature
3										Being by the water
4										Swimming / beach
5										Regional products / enjoying regional cuisine
6										Active in nature
7				+/-0%						Culinary
8					-2%	-1%				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

Source: inspektour (international) GmbH, 2023

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

1	1	1	1	1	2			1	1		Relaxation
2	2									1	Nature
3											Being by the water
4											Swimming / beach
5										2	Regional products / enjoying regional cuisine
6											Active in nature
7					1						Culinary
8			2	2		1	1	2			City break
9											Gardens / parks
10											Water-based holiday activities
11											(Small) city flair
12						2	2				Castles
13											Castles / gardens
14											Nature / dark sky star parks
15											Christmas markets
									2		Castles / mansions

(min. 1,000)

Source: inspektour (international) GmbH, 2023

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	
1	1	1	1	71%			1	1		Relaxation
67%	64%								1	Nature
3										Being by the water
4										Swimming / beach
5									80%	Regional products / enjoying regional cuisine
6										Active in nature
7				1						Culinary
8		64%	60%		1	1	69%			City break
9										Gardens / parks
10										Water-based holiday activities
11										(Small) city flair
12					70%	71%				Castles
13										Castles / gardens
14										Nature / dark sky star parks
15										Christmas markets
								68%		Castles / mansions

Source: inspektour (international) GmbH, 2023

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

DESTINATION BRAND 25

1	1	1	1	1	+/-0%			1	1		Relaxation
-8%	-10%									1	Nature
3											Being by the water
4											Swimming / beach
5										---	Regional products / enjoying regional cuisine
6											Active in nature
7					1						Culinary
8		-11%	-2%			1	1	+4%			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
									---		Castles / mansions

(min. 1,000)

Source: inspektour (international) GmbH, 2023

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

1	1	1	1	1	2	3		1	1		Relaxation
2	2			3						1	Nature
3											Being by the water
4	3										Swimming / beach
5										2	Regional products / enjoying regional cuisine
6											Active in nature
7			3		1					3	Culinary
8			2	2	3	1	1	2			City break
9											Gardens / parks
10											Water-based holiday activities
11											(Small) city flair
12						2	2		3		Castles
13								3			Castles / gardens
14											Nature / dark sky star parks
15											Christmas markets
							3		2		Castles / mansions

Source: inspektour (international) GmbH, 2023

Top two box on a scale from 5 = very interested to 1 = not at all interested, in % of respondents (min. 1,000)

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	1	1	1	2	69%			1	1		Relaxation
2	2		54%							1	Nature
3											Being by the water
4	64%										Swimming / beach
5		61%								2	Regional products / enjoying regional cuisine
6											Active in nature
7			64%		1					79%	Culinary
8			2	2	70%	1	1	2			City break
9											Gardens / parks
10											Water-based holiday activities
11											(Small) city flair
12						2	2		66%		Castles
13								64%			Castles / gardens
14											Nature / dark sky star parks
15											Christmas markets
							71%		2		Castles / mansions

(min. 1,000)

Source: inspektour (international) GmbH, 2023

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

1	1	1	1	1	2	+2%		1	1		Relaxation
2	2			-5%						1	Nature
---											Being by the water
4	-6%										Swimming / beach
5										2	Regional products / enjoying regional cuisine
6											Active in nature
7			-13%		1					-3%	Culinary
8			2	2	+0%	1	1	2			City break
9											Gardens / parks
10											Water-based holiday activities
11											(Small) city flair
12						2	2			---	Castles
13								---			Castles / gardens
14											Nature / dark sky star parks
15											Christmas markets
							---		2		Castles / mansions

min. 1,000)

Source: inspektour (international) GmbH, 2023

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

1	1	1	1	1	2	3		1	1	4	Relaxation
2	2			3						1	Nature
3	4										Being by the water
4	3	4									Swimming / beach
5			4	4						2	Regional products / enjoying regional cuisine
6											Active in nature
7		3			1	4				3	Culinary
8		2	2	2	3	1	1	2			City break
9											Gardens / parks
10											Water-based holiday activities
11											(Small) city flair
12						2	2	4	3		Castles
13							4	3	4		Castles / gardens
14											Nature / dark sky star parks
15											Christmas markets
							3		2		Castles / mansions

(min. 1,000)

Source: inspektour (international) GmbH, 2023

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

1	1	1	1	1	2	3	5	1	1	4	Relaxation
2	2			3					5	1	Nature
3	4	5									Being by the water
4	3	4									Swimming / beach
5				4	4					2	Regional products / enjoying regional cuisine
6	5										Active in nature
7		3			1	4				3	Culinary
8		2		2	3	1	1	2			City break
9											Gardens / parks
10											Water-based holiday activities
11											(Small) city flair
12				5		2	2	4	3		Castles
13					5	5	4	3	4	5	Castles / gardens
14											Nature / dark sky star parks
15											Christmas markets
							3	5	2		Castles / mansions

(min. 1,000)

Source: inspektour (international) GmbH, 2023

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

1	1	1	1	2	3	5	1	1	4	Relaxation	
2	2	8	3		13	14	7	5	1	Nature	
3	4	5	10	15			13	7		Being by the water	
4	3	4	6							Swimming / beach	
5	7	6	4	4	6	9	6	6	2	Regional products / enjoying regional cuisine	
6	5	9	8					14	6	Active in nature	
7	6	3	9	1	4	7	11	8	3	Culinary	
8	8	2	2	3	1	1	2			City break	
9	11	11		9	10	15	8	10		Gardens / parks	
10	10	10								Water-based holiday activities	
11	12	7	12	6	8	6	10	13	11	(Small) city flair	
12			5	8	2	2	4	3	7	Castles	
13	15	14	7	5	5	4	3	4	5	Castles / gardens	
14	13	15	14	12			12	11	10	Nature / dark sky star parks	
15		12	15	13	14		14			Christmas markets	
			11	7	7	3	5	2	8	Castles / mansions	
	9	13								Wellness	
	14									Hiking	
			13							Shopping	
				10	12					Tradition and craftsmanship	
				11		10		12		Culture	
				14	11	8				UNESCO world heritage sites	
					9	12	9	9	12	Museums	
					15	13	15			Architecture	
						11				Contemporary 20th century history	
								15	9	Beach lounges / beach bars	
									13	Contemporary / Modern Culture	
									14	Lively places	
									15	Cosy winter holiday	

Source market comparison (all 10 DB source markets)
Top 5 ranking (top of mind)

Question (short form):

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





TOP 5 ranking of international destinations 'unsupported awareness' – all 10 DB source markets

	DE	AT	CH	NL	FR	IT	ES	UK	US	CN
Italy	1	1	1	5	2		1	3	2	
Spain	2	3	3	2	1	2		1		
Austria	3		5							
France	4		2	3		4	2	4	4	5
Greece	5	5			4	5		5		
Croatia		2								
Germany		4	4	1						
Belgium				4						
Portugal					3		5			
London					5	3	4		3	
Paris						1	3	2	1	
Japan									4	2
Singapore										1
South Korea										3
Thailand										4

Source: inspektour (international) GmbH, 2025

Basis: All source markets, all respondents with valid answers (n = min. 786), multiple answers possible; figures given as % of respondents

TOP 10 ranking of international destinations ‘unsupported awareness’ – source markets DE, AT, CH & NL, including time comparison

															
DB25 rank	% of respondents*	DB20 rank	DB25 rank	% of respondents*	DB20 rank	DB25 rank	% of respondents*	DB20 rank	DB25 rank	% of respondents*	DB20 rank				
1	Italy	25.4%	1	1	Italy	36.2%	1	1	Italy	32.6%	1	1	Germany	32.0%	1
2	Spain	23.6%	2	2	Croatia	19.5%	2	2	France	22.8%	2	2	Spain	25.0%	2
3	Austria	14.6%	3	3	Spain	15.5%	4	3	Spain	21.7%	4	3	France	22.8%	3
4	France	11.5%	4	4	Germany	14.9%	3	4	Germany	17.1%	3	4	Belgium	21.6%	4
5	Greece	11.2%	6	5	Greece	13.5%	5	5	Austria	10.8%	5	5	Italy	17.5%	5
6	Turkey	11.1%	10	6	Paris	7.6%	7	6	Paris	10.6%	6	6	Paris	10.7%	10
7	Netherlands	8.1%	5	7	Hungary	7.3%	8	7	Greece	8.3%	9	7	London	10.4%	6
8	Paris	8.0%	9	8	London	6.5%	10	7	London	8.3%	7	8	Greece	9.2%	7
9	Switzerland	7.0%	8	9	France	6.2%	6	7	Portugal	8.3%	8	9	Austria	9.1%	9
10	Denmark	6.7%	7	9	Turkey	6.2%	15	10	Berlin	5.0%	11	10	Portugal	8.0%	12

Basis: Source markets DE, AT, CH and NL, all respondents with valid answers (n = min. 920), multiple answers possible; figures in % of respondents

Source: inspektour (international) GmbH / DI Tourismusforschung der FH Westkueste, 2020, inspektour (international) GmbH, 2025

TOP 10 ranking of international destinations ‘unsupported awareness’ – source markets FR, IT & ES, including time comparison

DB25 rank		% of respondents*	DB20 rank
1	Spain	37.3%	1
2	Italy	36.7%	2
3	Portugal	14.2%	3
4	Greece	11.1%	4
5	London	9.4%	8
6	Japan	8.6%	11
7	Morocco	8.0%	13
8	England	7.6%	7
8	Switzerland	7.6%	15
8	USA	7.6%	6

DB25 rank		% of respondents*	DB20 rank
1	Paris	27.1%	1
2	Spain	24.8%	3
3	London	20.0%	2
4	France	16.8%	4
5	Greece	14.9%	5
6	Barcelona	10.2%	6
7	Madrid	10.0%	8
8	Vienna	8.2%	9
9	Berlin	7.8%	7
10	Germany	7.6%	12
10	Portugal	7.6%	12

DB25 rank		% of respondents*	DB20 rank
1	Italy	24.8%	2
2	France	22.4%	3
3	Paris	21.5%	1
4	London	19.4%	4
5	Portugal	17.5%	5
5	Rome	17.5%	6
7	Germany	10.5%	7
8	Greece	8.9%	10
9	Berlin	7.3%	8
10	Lisbon	6.3%	9
10	Prague	6.3%	16

Basis: Source markets FR, IT and ES, all respondents with valid answers (n = min. 933), multiple answers possible; figures in % of respondents

TOP 10 ranking of international destinations ‘unsupported awareness’ – source markets UK, US & CN, including time comparison



DB25 rank		% of respondents*	DB20 rank
1	Spain	30.7%	1
2	Paris	22.9%	4
3	Italy	21.8%	3
4	France	18.9%	2
5	Greece	15.4%	5
6	Rome	10.3%	10
7	Portugal	9.5%	8
8	USA	8.6%	6
9	Germany	7.6%	9
10	Amsterdam	7.2%	7
10	New York	7.2%	14



DB25 rank		% of respondents*	DB20 rank
1	Paris	22.3%	1
2	Italy	20.5%	2
3	London	13.7%	3
4	France	12.7%	5
4	Japan	12.7%	13
6	Mexico	12.0%	7
7	Canada	11.5%	4
8	Germany	10.7%	10
9	Spain	9.3%	12
10	Greece	8.8%	14



DB25 rank		% of respondents*	DB20 rank
1	Singapore	27.7%	6
2	Japan	27.4%	1
3	South Korea	19.7%	2
4	Thailand	16.1%	3
5	France	14.0%	5
6	Germany	10.9%	4
7	Australia	10.1%	12
8	USA	8.7%	10
9	Malaysia	8.5%	13
10	Paris	8.4%	7

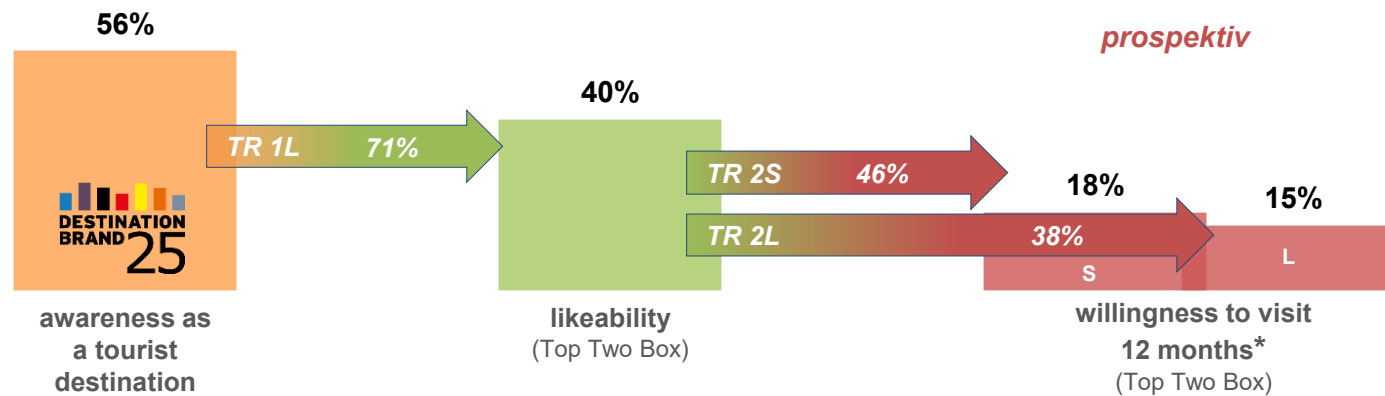
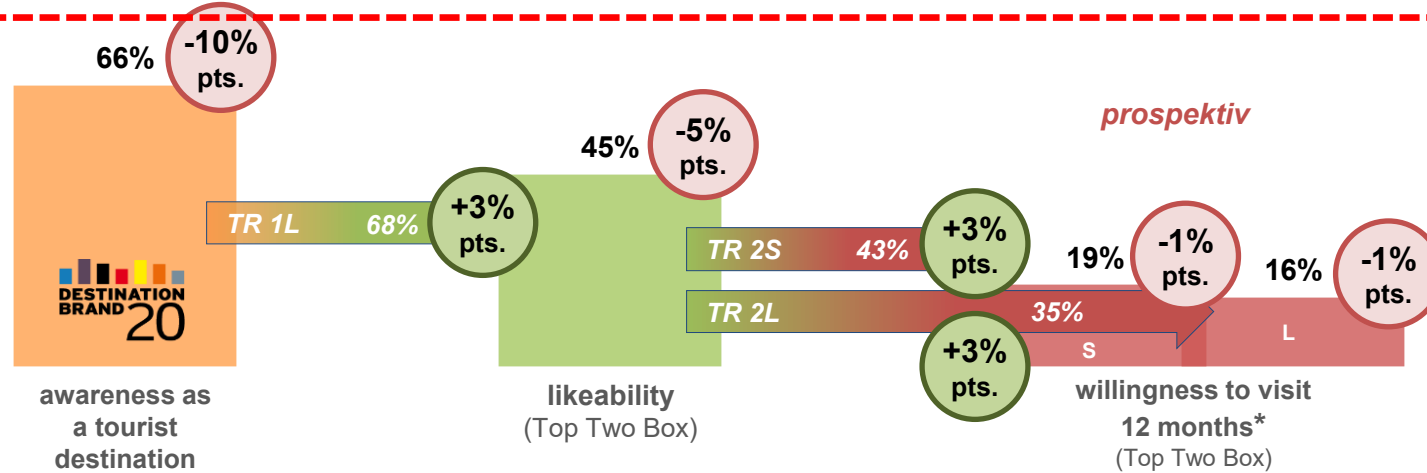
Basis: Source markets UK, USA and CHN, all respondents with valid answers (n = min. 786), multiple answers possible; figures in % of respondents

Source market Germany:
BrandValue+ of tourist destinations
over time

Base: Brand funnel

The brand funnel – Time comparison between DB20 and DB25

Source market Germany: Comparison of average values for 112 domestic destinations



market entry indicator

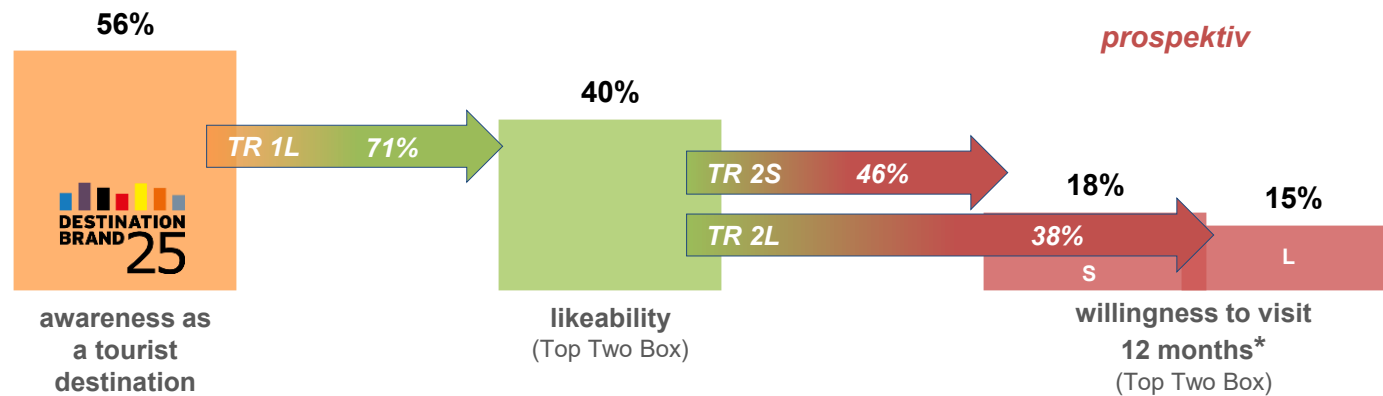
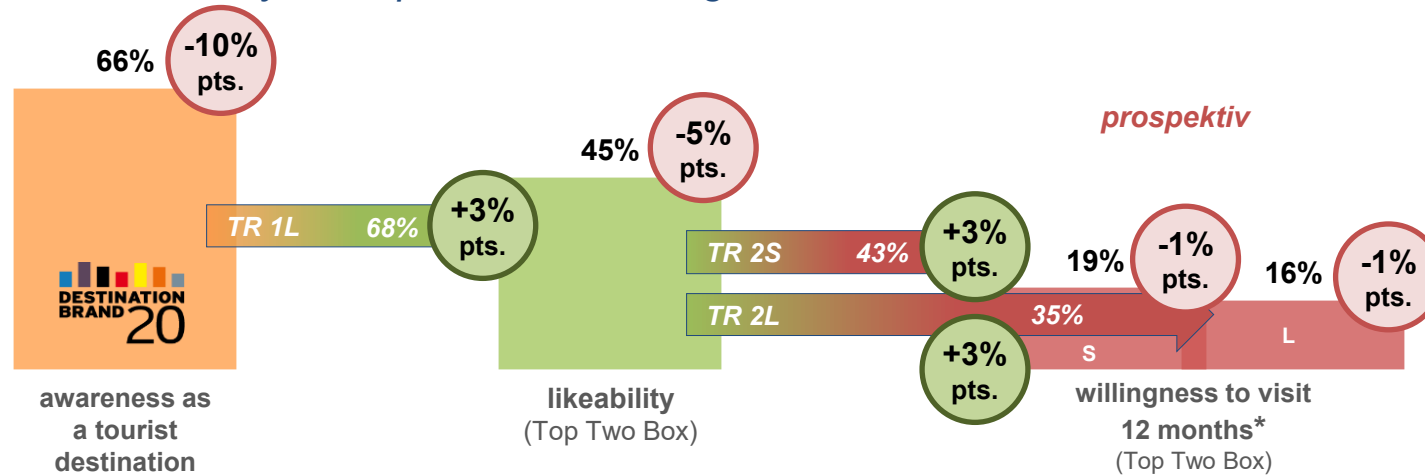
target value

Source: inspektour (international) GmbH / DI Tourismusforschung der FH Westküste, 2020; 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

The brand funnel – Time comparison between DB20 and DB25

Source market Germany: Comparison of average values for 112 domestic destinations



market entry indicator

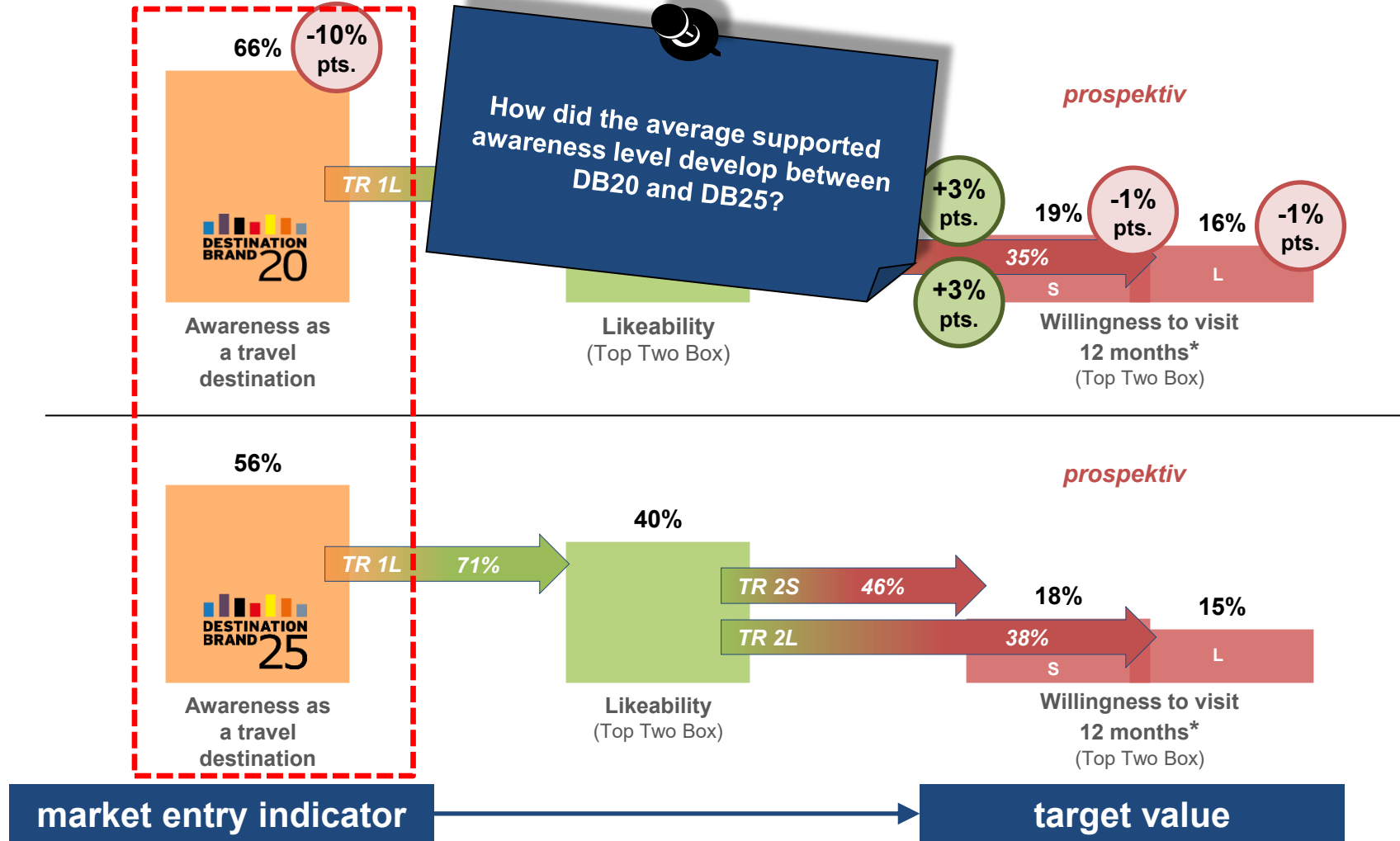
target value

Source: inspektour (international) GmbH / DI Tourismusforschung der FH Westküste, 2020; 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

The brand funnel – Time comparison between DB20 and DB25

Source market Germany: Comparison of average values for 112 domestic destinations

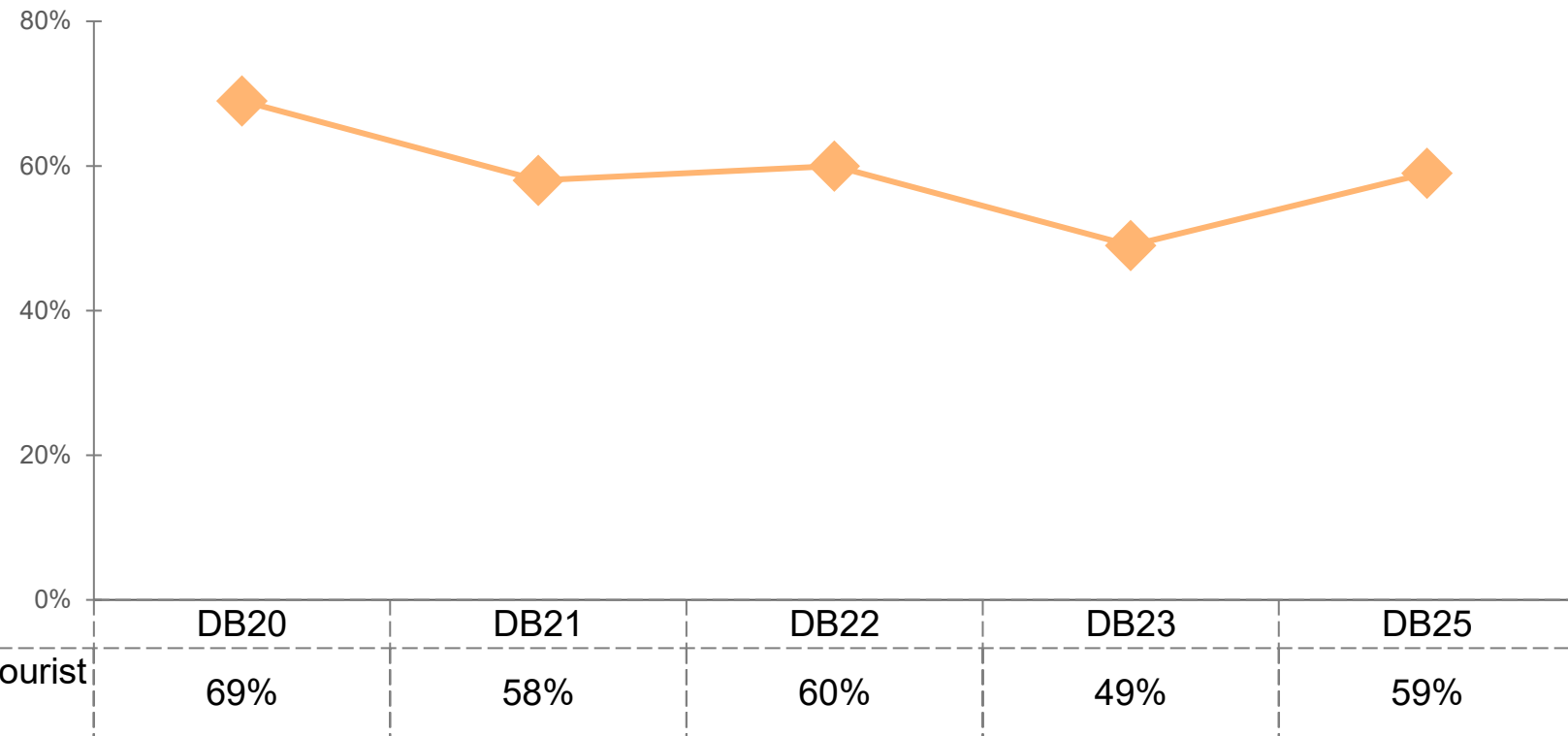


Source: inspektour (international) GmbH / DI Tourismusforschung der FH Westküste, 2020; inspektour (international) GmbH, 2025

* 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

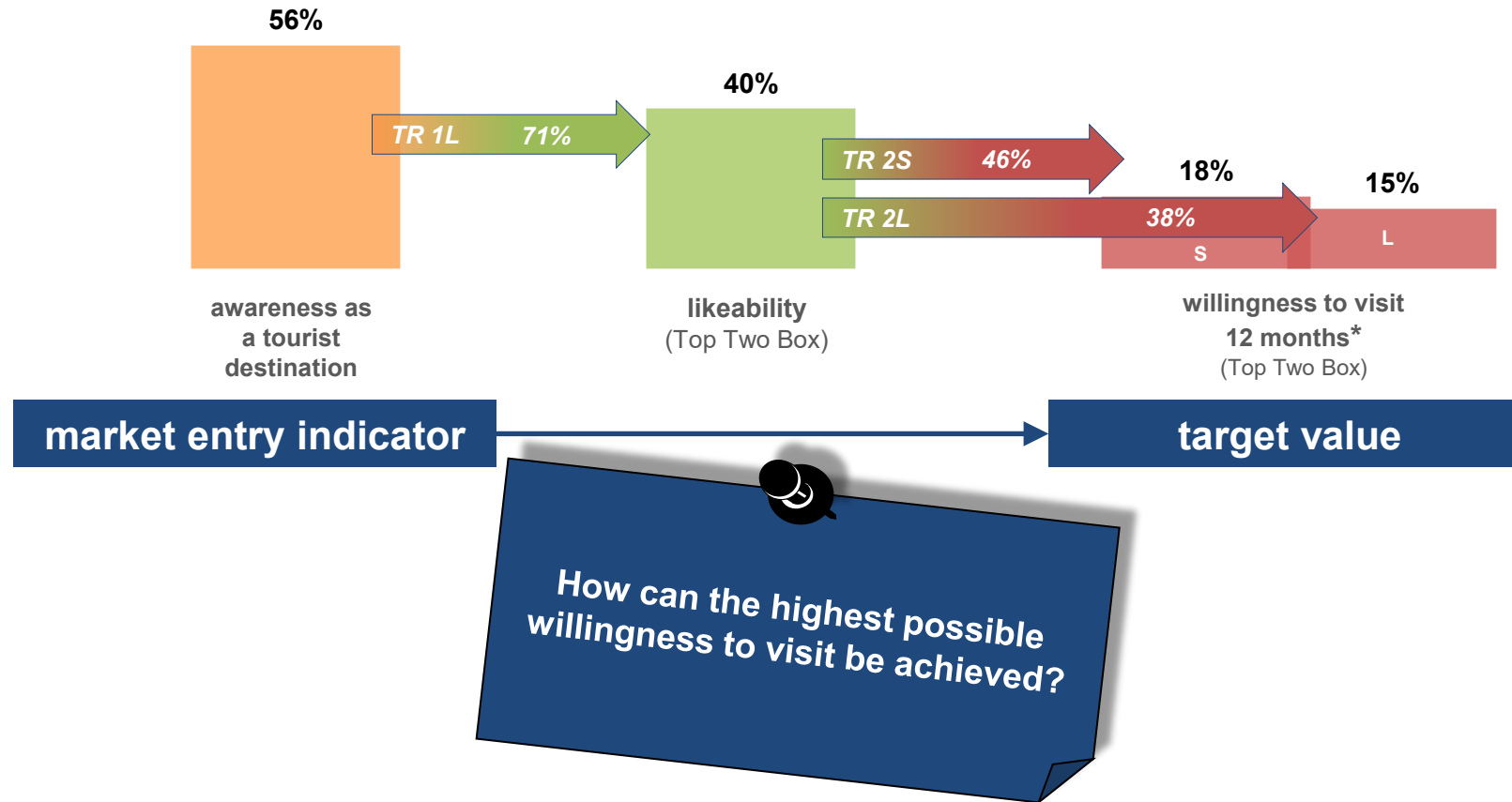
The brand funnel – Time comparison between DB20 and DB25

Source market Germany: Comparison of average values for 90 domestic destinations, which were collected in all study years from DB20 to DB25.



Quelle: inspektour (international) GmbH / DI Tourismusforschung der FH Westküste, 2020; inspektour (international) GmbH, 2021-2023 / 2025

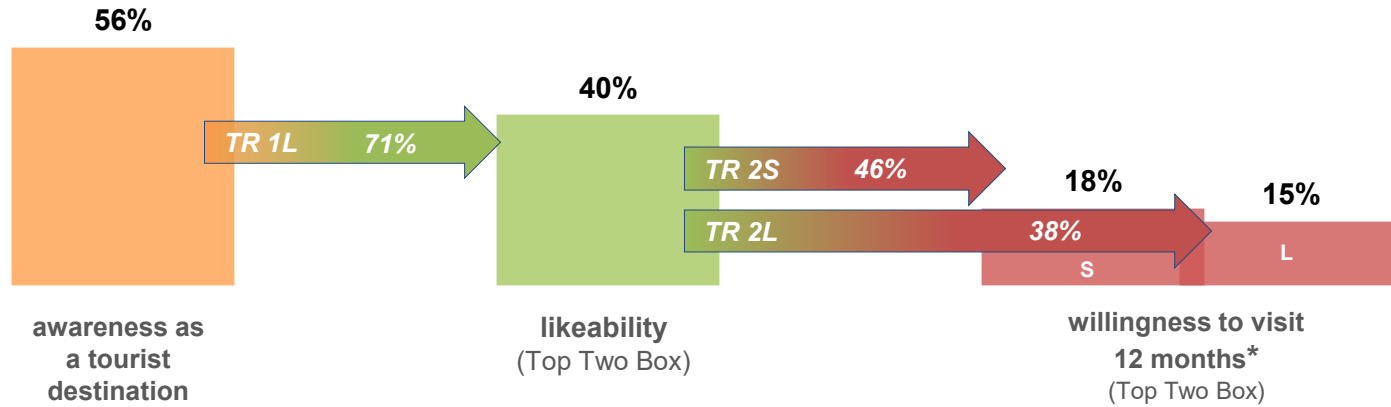
The brand funnel – Model overview



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

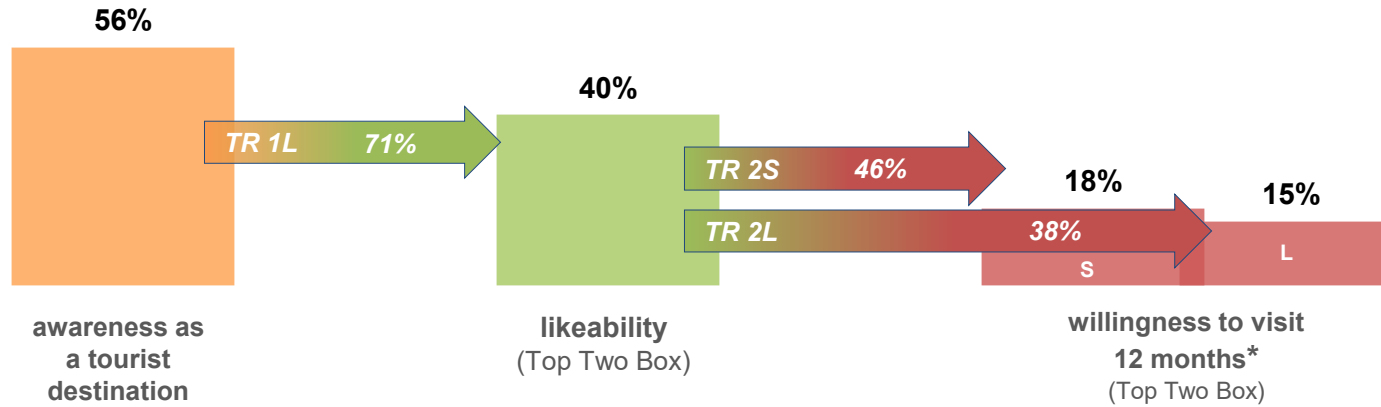
The brand funnel – Model overview



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

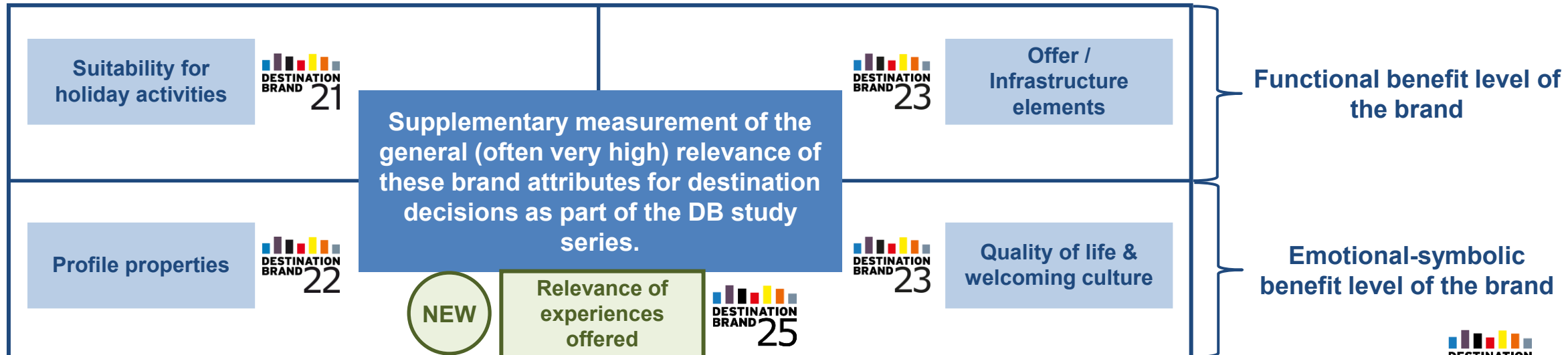
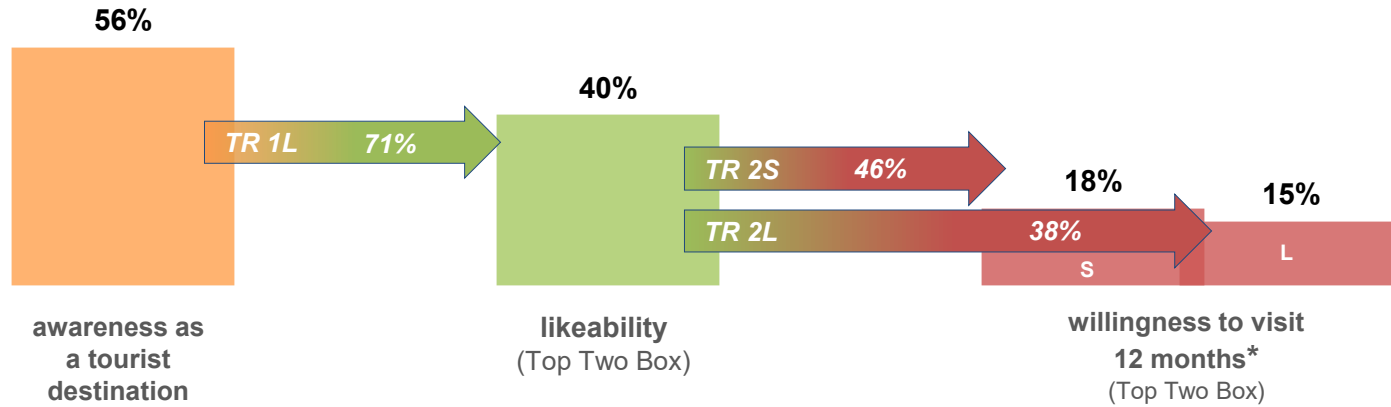
The brand funnel – Model overview



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

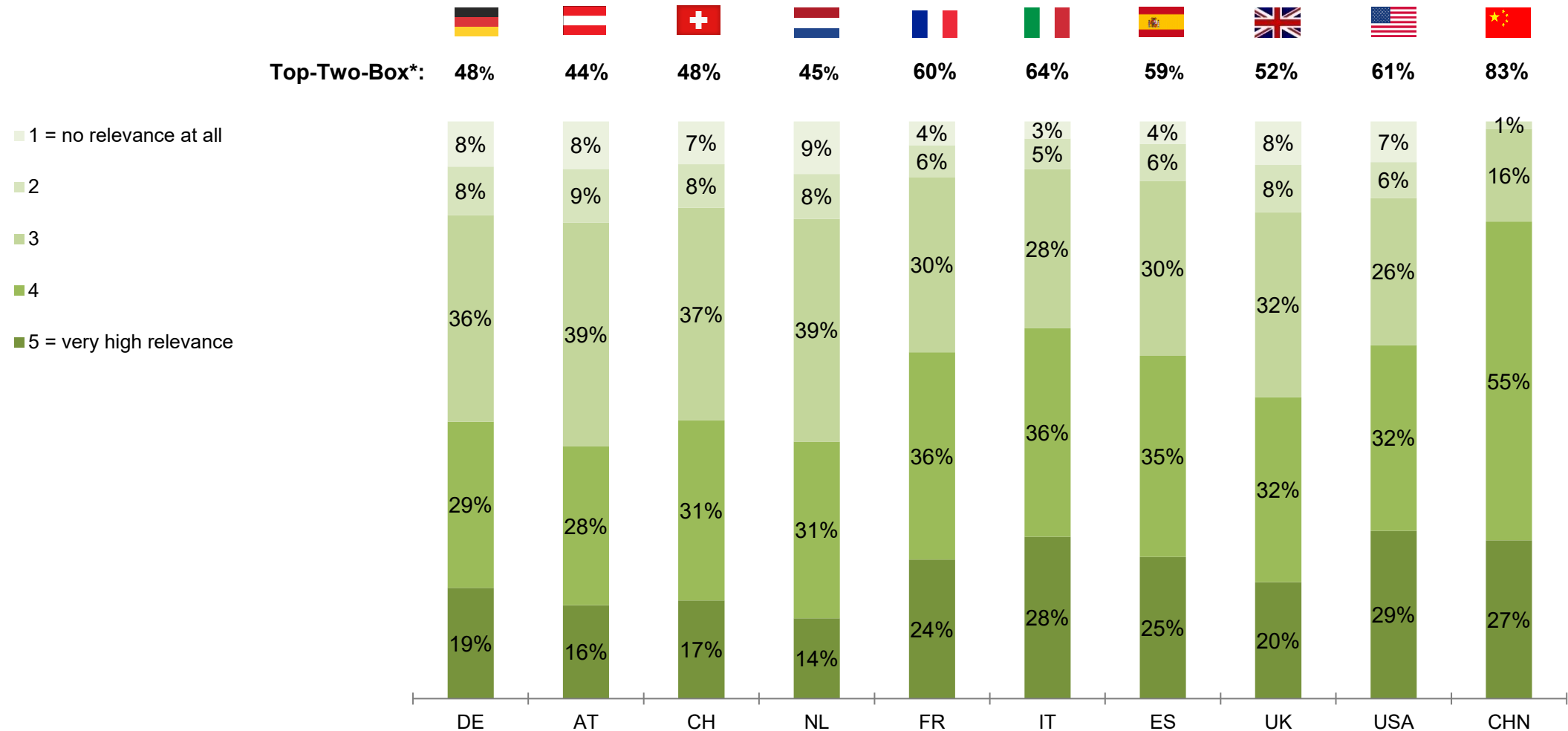
The brand funnel – Model overview



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

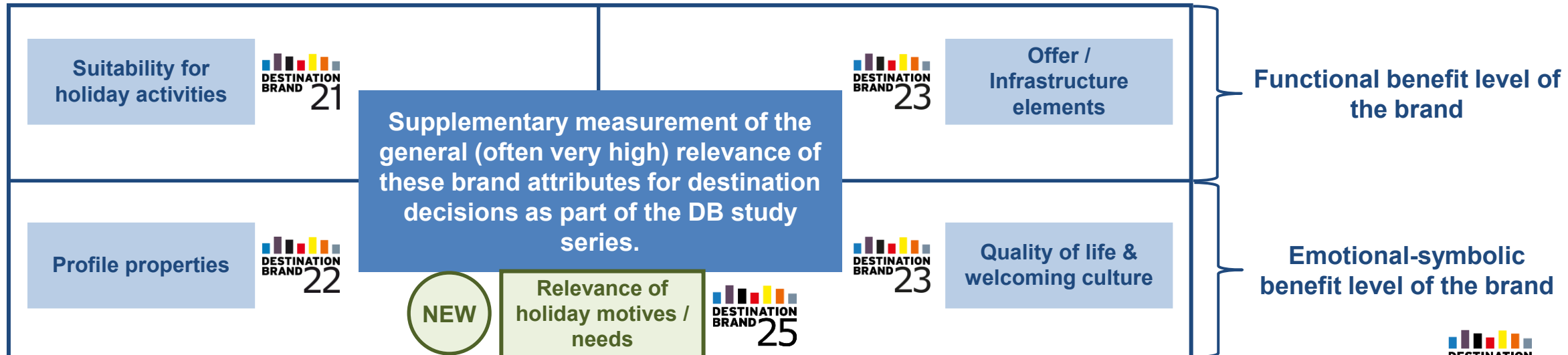
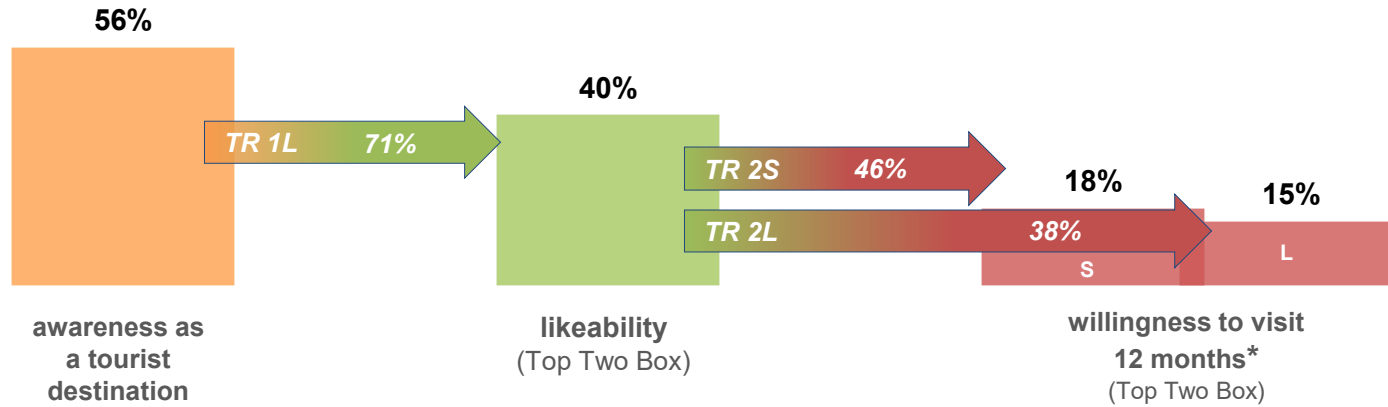
General relevance of experiences offered for destination selection – *source market comparison (all 10 DB source markets)*



Source: inspektour (international) GmbH, 2025

Basis: All respondents in all 10 source markets (n = min. 1,000)
Top two box on a scale from '5 = very high relevance' to '1 = no relevance at all'; stated as % of respondents

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

General relevance – all 10 DB source markets

Ranking of the considered holiday motives and requirements with regard to the general relevance for destination selection
Base of comparison: holiday motives and requirements



											
75%											Fun & delight
73%											Distance from every-day life
73%											Tranquil, stress-free environment
71%											Be free
69%											Regenerate on a physical level
64%											Breathtaking landscapes
63%											Family / friends
62%											Spoil yourself
57%											Curiosity / something new
53%											New cultures / locations
50%											Nature / connection to the environment
47%											Spend money on yourself
45%											Knowledge / further develop
44%											Find yourself
37%											Special accommodations
37%											Get to know new people
30%											Creativity / artistic
30%											Physical challenges
29%											Digital detox
28%											Help / engage socially
27%											Adrenaline rush / thrills
27%											"Instagrammable" places
22%											Religious or spiritual experience
22%											Prestige and status

min. 1,000)

Source: inspektour (international) GmbH, 2023

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

General relevance – all 10 DB source markets

DESTINATION BRAND 25

Ranking of the considered holiday motives and requirements with regard to the general relevance for destination selection
Base of comparison: holiday motives and requirements

1											Fun & delight
2											Distance from every-day life
3											Tranquil, stress-free environment
4											Be free
5											Regenerate on a physical level
6											Breathtaking landscapes
7											Family / friends
8											Spoil yourself
9											Curiosity / something new
10											New cultures / locations
11											Nature / connection to the environment
12											Spend money on yourself
13											Knowledge / further develop
14											Find yourself
15											Special accommodations
16											Get to know new people
17											Creativity / artistic
18											Physical challenges
19											Digital detox
20											Help / engage socially
21											Adrenaline rush / thrills
22											"Instagrammable" places
23											Religious or spiritual experience
24											Prestige and status

min. 1,000)

Source: inspektour (international) GmbH, 2023

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

General relevance – all 10 DB source markets

Ranking of the considered holiday motives and requirements with regard to the general relevance for destination selection
Base of comparison: holiday motives and requirements

1	1	1	1	1	1	2	1	2	1	2	Fun & delight
2	3	4	5			4	2				Distance from every-day life
3	2	3	4	4	4	5	5		3	4	Tranquil, stress-free environment
4	4	2	2	2	2	1	4	4			Be free
5	5	5	3	5							Regenerate on a physical level
6				3			3	1	2	3	Breathtaking landscapes
7								3	4	1	Family / friends
8						3					Spoil yourself
9								5	5		Curiosity / something new
10										5	New cultures / locations
11											Nature / connection to the environment
12											Spend money on yourself
13											Knowledge / further develop
14											Find yourself
15											Special accommodations
16											Get to know new people
17											Creativity / artistic
18											Physical challenges
19											Digital detox
20											Help / engage socially
21											Adrenaline rush / thrills
22											"Instagrammable" places
23											Religious or spiritual experience
24											Prestige and status

min. 1,000)

Source: inspektour (international) GmbH, 2023

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

General relevance – all 10 DB source markets

Ranking of the considered holiday motives and requirements with regard to the general relevance for destination selection
Base of comparison: holiday motives and requirements

1											Fun & delight
2											Distance from every-day life
3											Tranquil, stress-free environment
4											Be free
5											Regenerate on a physical level
6											Breathtaking landscapes
7											Family / friends
8											Spoil yourself
9											Curiosity / something new
10											New cultures / locations
11											Nature / connection to the environment
12											Spend money on yourself
13											Knowledge / further develop
14											Find yourself
15											Special accommodations
16											Get to know new people
17											Creativity / artistic
18											Physical challenges
19	19	20	21	19	14	17	17	20	20		Digital detox
20											Help / engage socially
21											Adrenaline rush / thrills
22											"Instagrammable" places
23											Religious or spiritual experience
24											Prestige and status

(min. 1,000)

Source: inspektour (international) GmbH, 2023

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

General relevance – all 10 DB source markets

Ranking of the considered holiday motives and requirements with regard to the general relevance for destination selection
Base of comparison: holiday motives and requirements

1											Fun & delight
2											Distance from every-day life
3											Tranquil, stress-free environment
4											Be free
5											Regenerate on a physical level
6											Breathtaking landscapes
7											Family / friends
8											Spoil yourself
9											Curiosity / something new
10											New cultures / locations
11											Nature / connection to the environment
12											Spend money on yourself
13											Knowledge / further develop
14											Find yourself
15											Special accommodations
16											Get to know new people
17											Creativity / artistic
18											Physical challenges
19	29%	29%	27%	18%	32%	53%	42%	34%	42%	64%	Digital detox
20											Help / engage socially
21											Adrenaline rush / thrills
22											"Instagrammable" places
23											Religious or spiritual experience
24											Prestige and status

min. 1,000)

Source: inspektour (international) GmbH, 2023

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

General relevance – all 10 DB source markets

DESTINATION BRAND 25

Ranking of the considered holiday motives and requirements with regard to the general relevance for destination selection
Base of comparison: holiday motives and requirements

1											Fun & delight
2											Distance from every-day life
3											Tranquil, stress-free environment
4											Be free
5											Regenerate on a physical level
6											Breathtaking landscapes
7											Family / friends
8											Spoil yourself
9											Curiosity / something new
10											New cultures / locations
11											Nature / connection to the environment
12											Spend money on yourself
13											Knowledge / further develop
14											Find yourself
15											Special accommodations
16											Get to know new people
17											Creativity / artistic
18											Physical challenges
19											Digital detox
20											Help / engage socially
21											Adrenaline rush / thrills
22		22	18	18	16	17	14	21	18	15	"Instagrammable" places
23											Religious or spiritual experience
24											Prestige and status

min. 1,000)

Source: inspektour (international) GmbH, 2023

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

General relevance – all 10 DB source markets

Ranking of the considered holiday motives and requirements with regard to the general relevance for destination selection											
Base of comparison: holiday motives and requirements											
1											Fun & delight
2											Distance from every-day life
3											Tranquil, stress-free environment
4											Be free
5											Regenerate on a physical level
6											Breathtaking landscapes
7											Family / friends
8											Spoil yourself
9											Curiosity / something new
10											New cultures / locations
11											Nature / connection to the environment
12											Spend money on yourself
13											Knowledge / further develop
14											Find yourself
15											Special accommodations
16											Get to know new people
17											Creativity / artistic
18											Physical challenges
19											Digital detox
20											Help / engage socially
21											Adrenaline rush / thrills
27%	26%	28%	22%	39%	47%	45%	31%	43%	69%		"Instagrammable" places
23											Religious or spiritual experience
24											Prestige and status

min. 1,000)

Source: inspektour (international) GmbH, 2023

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

Further Destination Brand 25 webinars

SAVE THE DATE – our next DB25 webinar:

 **26 February 2026 at 11 a.m. CET**

The BrandValue+ of cities and metropolitan regions – First selected results

Language: English

 [Further information and free registration](#)



Further DB25 webinars after
ITB Berlin

Contact person for the Destination Brand study series



Contact person Destination Brand

Ellen Böhling, M.A.

Managing Partner inspektour international GmbH

Tel.: +49 (0) 40. 414 3887 412

E-Mail: ellen.boehling@inspektour.de

Project team



Managing Partner inspektour (international) GmbH

Ralf Trimborn

Dipl.-Kulturmanager, Dipl.-Kfm. (FH)

Tel.: +49 (0) 40. 414 3887 42

E-Mail: ralf.trimborn@inspektour.de



Market Research Project Manager

Alexander Koch

M.A. International Tourism Management

Tel.: +49 (0) 40. 414 3887 46

E-Mail: alexander.koch@inspektour.de



Data analysis / data preparation

Dörte Waldmann

M.A. Geographie und Tourismus

Tel.: +49 (0) 40. 414 3887 417

E-Mail: doerte.waldmann@inspektour.de



Data analysis / data preparation

Sistine Sadlowski

M.A. International Tourism Management

Tel.: +49 (0) 40. 414 3887 43

E-Mail: sistine.sadlowski@inspektour.de

Legal notice

- ▶ **Publisher**
inspektour (international) GmbH
Tourismus- und Regionalentwicklung
Ellen Böhling, M.A.
Dipl.-Kulturmgr., Dipl.-Kfm. (FH) Ralf Trimborn
Geschäftsführende Gesellschafter
Osterstraße 124
20255 Hamburg
- ▶ **Overall project management** inspektour (international) GmbH, Hamburg
- ▶ **Data collection** Ipsos GmbH, Hamburg