

Sustainable and City-Compatible Berlin Tourism Plan 2018+

Introduction

The development of Berlin's tourism sector since 1990 has been a major success story. The German capital has become one of the top travel destinations in international city tourism. With tourism spending contributing €11.6 billion to the capital and providing 235,000 full-time jobs in purely statistical terms, tourism has long been one of the main pillars of the city's economy. Today, tourism in Berlin is a major influence on the cityscape and urban culture, so much so that this sector is also strategically important for the entire city's development and the quality of life of its residents. However, for some time now the global development of tourism has been caught up in an increasingly dynamic process of change, and this also impacts the future of Berlin's tourism sector.

The Berlin Senate has recognised these signs of the times and is responding with the appropriate measures to meet the changing global and local situation. With this tourism plan, it is creating the requisite framework conditions for a sustainable, city-compatible and socially fair tourism – since, after all, the city belongs to all those using it.

This plan also aims to lay out a roadmap for long-term moderate growth in tourism. In doing so, it is committed both to continuity and change: continuity in brand positioning and marketing for Berlin's core target groups, and change in the sense of sustainability and city-compatible policies as basic principles in ensuring long-term acceptance and preserving resources. The present Tourism Plan focuses on the requirements for city-compatible tourism in Berlin, and hence is not a market-oriented tourism plan in the classic sense.

Berlin Tourism: Analysis and Perspectives

To gain an overview of Berlin tourism in 2017 and describe it as fully as possible, the analysis combined information from various data sources.

1. 60 expert discussions with actors from all fields in Berlin tourism – policy-makers, the Senate and borough authorities, associations and interest organisations, tourist service providers, etc.
2. Extensive data analysis on Berlin tourism, incl. special analyses of tourism as an economic factor as well as ‘tourism for Berliners’ and key competing destinations.
3. Evaluating literature to review the scholarly debate on city tourism in Germany and Europe, focusing in particular on such trends as digitisation, new urban tourism, etc.
4. Pilot study taking four selected locations in Berlin as examples of the formation and change in urban locations attracting tourists as must-see places to visit.

The analysis can be summarised as seven key insights:

1. The tourism sector in Berlin is a major source of revenue and a driver for jobs, and is set to continue its track-record of growth.
2. Berlin has positioned itself as a top international location, and has to meet the challenge of adjusting to trends and framework conditions.
3. The existing monitoring instruments can only partially provide the knowledge required on old and new forms of tourism and tourist activities in Berlin.
4. Tourism in Berlin is strongly concentrated in particular areas, yet all 12 boroughs have potential to attract tourists.
5. Urban space is increasingly used for tourist activities – and Berlin, as a growing city, is facing new challenges.
6. Visitors want to experience real life in Berlin.
7. The key challenges for quality tourism in Berlin are low prices and visitor satisfaction.

The goals for city-compatible, sustainable tourism in Berlin

Berlin's policy-makers have set the goals for the city's tourism in future. Under the coalition agreement between the ruling political parties in the Berlin Senate government for the legislature period 2016-2021, Berlin is to be positioned for long-term city-compatible and sustainable tourism. In this process, the diversity in city districts and neighbourhoods is to be preserved, and measures taken to ensure the interests of residents, businesses and visitors are suitably balanced.

1. Making Berlin an even more attractive and enjoyable experience for visitors goes hand in hand with increasing the quality of life for residents
2. Further developing Berlin tourism qualitatively, with the aim of achieving moderate and stable qualitative growth
3. A differentiated view of tourism is needed for different urban areas; the special attractions, features and requirements in the individual boroughs need to be clearly elaborated, and then taken as the basis for deriving the requisite measures for developing tourism (steering and marketing)
4. Sustainability as a maxim for action to ensure Berlin tourism continues to develop in a way compatible for the city (economically, ecologically and socially)

Strategic Guidelines for the Berlin Tourism Plan 2018+

The parameters described here are intended as continuous guidelines for action. They need to be implemented in tourism policy to facilitate the successful realisation of all further operative measures.

Governance

Recognising tourism as a cross-sectional task. City-compatible and sustainable tourism is a cross-sectional task. For this reason, tourism policy must be regarded in future as an essential component of a holistic, integrative and spatially differentiated urban development policy. This perspective entails an expanded view, not merely seeing the policies steering tourism as business promotion alone, but as part of urban development.

Qualitative Value Added

Redefining quality tourism. For Berlin, sustainable growth in tourism stands, first and foremost, for two things: more quality and more value added. To achieve these

objectives, the previous emphasis on efforts primarily directed at quantitative growth (more visitors) has to be replaced with goals formulated to foster quality and value added. By implication, this also means that tourism's influence on sales and incomes will, in future, have to be secured more through enhanced quality and less through quantitative increases. Until now, behavioural segmentation has only been partial applied to target groups for Berlin tourism, and focused almost exclusively on the domestic market. Moreover, the indicators and instruments to select and address city-compatible visitor groups are still largely lacking as yet.

These first need to be defined and data on them collected in addition to the existing, classic key indicators (above all from official statistics on accommodation). Berlin's tourism needs a target group segmentation taking all aspects of city compatibility into account.

Participation

Shaping city compatibility together. City compatibility can only be successful with the participation of Berlin's residents. Working on city-compatible tourism presupposes the involvement of Berlin's residents. They, after all, are the ones creating that Berlin life so much in demand with tourists. The Berliners also use their city's own tourist services in their leisure time, are directly affected by tourism, and know where services and infrastructures can be improved to increase the quality of life and experience. The aim is to permanently integrate this valuable local expertise in developing Berlin's tourism – and do so, on the one hand, as a source of inspiration for opening up new potential (Berliners as pioneers for new urban tourism) and, on the other, as an early warning system for the first signs of tourist overload.

Monitoring

Enhancing our understanding of Berlin tourism. We can only shape what we understand. The changed nature of tourism in Berlin and the goal of city compatibility requires clearly expanding our perspective – and for this, the former classic focus on tourism analysis and steering tourist flows is no longer sufficient. The familiar key performance indicators (KPIs) are simply no longer adequate as tools to respond to the changing market trends in tourism. This is only too evident, for example, in the data collected on overnight stays.

As yet, the figures here are unable to adequately reflect new forms of tourist accommodation (*e.g., sharing economy*), which represent such an important growth segment. Given the latest trends (*e.g., new urban tourism*) and the goal of city com-

patibility and sustainability (*e.g., spatial differentiation, early identification of signs of tourism overload*), a completely new set of KPIs will also be relevant for developing tourism in Berlin. Rather than calling for the replacement of all previous indicators, this approach is focused more on the need for continuity in and expansion of the instruments for monitoring tourism. These include, for example, the degree of acceptance of tourism among Berlin's residents, their own evaluation of life quality, guest satisfaction, or the distribution of tourist activities across the city's districts, and the activity patterns of visitors. In future, it will be important to ensure an even stronger compilation of the qualitative and quantitative indicators and insights from various sources.

Managing tourism on the neighbourhood level

Taking spatial differentiation seriously. New urban tourism is flowing ever further into the city's residential districts. This development presents opportunities and challenges for a new city-compatible tourism policy for Berlin. Here, evolving an approach to managing and developing tourism on the neighbourhood level offers an important instrument for a spatial differentiation in tourism services. The foundation for this comes from gathering data on the differentiated demands within the city, individual districts and boroughs, taking jointly developed target brands as a basis.

From the potentials, conflicts and resources ascertained in this process, it can then be determined which formats are best suited to managing tourism on the particular

neighbourhood levels. These might be, for example, round tables on tourism or working groups on the special needs of tourists, or the use of responsible figures on the local level, volunteers and cooperations with associations or specialist players.

While some tourist hotspots may primarily need moderation and mediation, the exploitation of potentials in those neighbourhoods less visited by tourists as yet may require steering mechanisms, product development and/or location management. In developing future measures, it is essential to take this difference in demands and challenges in the individual boroughs into account. It is crucial that all the boroughs are viewed with their specific requirements and that the overarching marketing presents and communicates the diversity of Berlin's boroughs / neighbourhoods.

Digitisation and inclusion/ accessibility as a cross-cutting issue

Accessibility and digitisation have been defined as cross-cutting issues for all task fields. As a result, these two issues will not be dealt with individually here, since they must be an integral part of all measures.

- **Digitisation**

In city tourism especially, digitisation has a decisive role to play in competition. A fully digitised range of services, bookable online (from accommodation and restaurants to city tours and theatre tickets) or as digital visitor guidance (via a guidance system, app or smart wearables) are already standard in most major cities. With the dynamics of digital development constantly increasing (over the

next years primarily driven by artificial intelligence), this area represents one of the largest challenges for Berlin tourism. Digitisation can be used to drive forwards city-compatible, sustainable tourism in Berlin. Digital solutions can be utilised for innovative approaches to managing tasks.

- **Inclusion/ Accessibility**

For city-compatible tourism in Berlin, inclusion and accessibility are essential goals. Not only do they open up possibilities for all visitors to participate, but all residents as well. In addition, they represent a key quality benchmark for various target groups. Accessible services and infrastructures are not just important for people with a disability. Seniors with limited mobility, families with children, foreign visitors, guests with luggage and many other groups also benefit from these measures. Systematic inclusion is far less about establishing individual services at certain places. Instead, the goal must be to establish accessibility as a basic principle down the service chain – from accommodation to leisure activities and mobility.

Tasks for Berlin Tourism 2018+

The spectrum of tasks for Berlin's destination management is significantly increasing on the operative level. On the one hand, the aim is to continue activities in the established work fields (*e.g.*, *destination marketing*) and – where sensible and feasible – to relate these to city-compatible tourism.

On the other hand, the new strategic direction and goals also involve new fields. In these, the aim of city-compatible tourism is to be worked on in concrete projects.

Scope of tasks and measures

Actively channelling the flow of tourists to improve distribution and open up potentials

- Developing a differentiated system for monitoring the development of tourism in Berlin. This includes mapping and monitoring the existing commercial structures including the accommodation sector; using real-time information at specific locations to document flows of visitors within the city and analyse

patterns of use of the tourism infrastructure. This monitoring system provides the basis for developing a spatial model for tourism.

- Compiling data on demand on the borough and neighbourhood level, as well as establishing needs-based strategic tourism representatives depending on the situation and goals in each borough; in addition, the boroughs are to support tourist-sector businesses and attractions (points of interest = POIs) in the outer districts.
- Introducing an integrated, city-wide unified system for monitoring visitor information and channelling flows by the systematic implementation of the planned information columns, and expansion to other locations across the entire urban area (also beyond the model phase), including the integration of sustainable and accessible mobility services (*e.g.*, *local transport network, bike tours*).
- Continuing and expanding marketing activities to strategically promote services and attractions in outer districts (*e.g.*, *Going Local by visitBerlin*), developing

and expanding, for instance, themed routes, and connecting activities and services in the inner city and outer districts as well as in the neighbouring federal state of Brandenburg (e.g., *Industrial Heritage Route, Bauhaus, sports, gardens and parks*).

Cultivate and expand a culture of hospitality

- Promoting events where locals and visitors can meet and talk.
- Developing campaigns to create greater awareness of such topics as friendliness and consideration in public space, willingness to help others using public transport, respecting the customs of other cultures, paying more attention to the needs of others, etc.

Increasing acceptance through heightened awareness and participation

- Continuing *visitBerlin's* HIER IN BERLIN project, including the HIER mobile stand touring Berlin's neighbourhoods to encourage dialogue and local participation.
- Establishing a permanent citizens' advisory council to enable the direct experience of on-site tourism from the perspective of the city's residents to flow back into the sector and policies, and to play an active part in developing project ideas for city-compatible tourism.
- Continuing regular surveys of the acceptance of tourism among Berlin's residents.

- Drafting a position paper on 'Rethinking City/Tourism' on the tourist practices influencing the city, and the urban and economic importance of tourism in Berlin.
- Developing and implementing project ideas on the topic of a 'culture of welcoming tourists' through Service in the City, a network-based initiative, e.g., developing joint campaigns with sharing platforms to encourage an awareness in new urban tourists of their responsibilities (visitors looking for an authentic experience of the city in Berlin's neighbourhoods).
- Reinforcing the topic of the 'city's added value' at major sports events: one focus is to be on networking with sporting activities for Berlin's residents, for example, the 'Berlin turnt bunt!' campaign for locals during the International German Gymnastics Festival in 2017.

Preserving a diverse neighbourhood culture and maintaining public space

- Regular cleaning of parks which attract large numbers of tourists; this could be arranged, for instance, by consolidating the successful park cleaning pilot project launched by the BSR City Cleaning Services (at present in 12 of Berlin's parks, including Görlitzer Park and in front of the TV Tower) and expanding the project to other parks and gardens with high visitor numbers.

- Increasing the promotion of projects and programmes for urban cleanliness and waste prevention and advertising them in the city, continuing and expanding activities under the Service in the City initiative and the BSR project to improve cleanliness.
- Implementing the plan for creating public toilet facilities in Berlin, taking into account those hotspots with especially high tourist numbers and the corresponding higher need for facilities there. To realise this aim, the possibility of funding from the Joint Federal Government/Länder Scheme for the Improvement of Regional Economic Structures (GWR) is to be assessed and individual solutions developed where necessary.
- Working in close cooperation with the citizens' advisory council to derive appropriate measures to sustain the diverse and unique neighbourhood culture in Berlin (building on mapping the existing commercial structures in districts especially strained by tourism to enable an early identification of a concentration of commercial tourist service structures and launch the requisite measures to counter such a development).
- Additional personnel for public order offices in the boroughs to take firm action in cases of breaches of noise control measures, to monitor cleanliness and provide security.
- Further developing the 'Experience Your City' (Erlebe Deine Stadt) project, which gives Berlin residents favourable rates

at hotels in the city on a fixed date, integrating other tourist services where appropriate.

Brand management for city-compatible tourism

- Continuing the brand process for the Berlin brand with the participation of the Berlin Senate Chancellery and all marketing organisations (in particular *visitBerlin*, Berlin Partner, and cultural projects) as one of the tasks of the Brand Steering Committee.
- Practically-oriented preparation and operationalisation of the previous fundamentals (brand essence) for all players in Berlin tourism (boroughs, businesses, etc.), *e.g., by transforming them into brand principles and guidelines*, as well as drafting internal communication measures for Berlin as a tourist brand (*e.g., brand handbook, workshops*).
- Drafting a central, cross-borough plan for (major) events in Berlin, taking into account city-compatible aspects (*e.g., compatible with the life quality of Berlin's residents*) as well as halo effects on Berlin as a tourist brand (*e.g., image and quality of events*).
- Expanding marketing activities on accessibility by further developing the Access Berlin digital services; extending them to include other user groups (*e.g., not only people with limited mobility, but also people who are partially sighted or hard of hearing*).

- Developing accessibility as a sign of quality. Creating incentives (above all financial support as well as marketing) for businesses down the entire service chain to obtain certification under the Reisen für Alle (Tourism for All) nationwide scheme; expanding the requirements for accessibility defined under the provisions on restaurants and pubs (Gaststättenverordnung) to accommodation services as well (at present the provisions only apply to restaurants and pubs); intensifying checks on those engaged in business to lend greater weight to the need to adhere to existing regulations (*e.g., provisions on restaurants and pubs, width of free pavement for restaurants with tables outside*).

Better exploiting the potential for cultural tourism

- Developing and strengthening the visibility of decentralised cultural services provided by museums, theatres and festivals, as well as the independent arts, music and club scene.
- Intensify the networking of cultural service providers with other tourist services through appropriate formats in a dialogue with all stakeholders from the business, cultural, and policy sectors as well as representatives of the city's residents.
- Developing and supporting cooperation projects on a partnership basis between players in a central location and cultural services in decentralised locations, following models of similar projects

in neighbouring European countries. (Senate Department of Culture and Europe (SenKultEu))

Accommodation regulation

- Checking whether a hotel development plan under applicable law could utilise the possibility of urban location management and taxation of the accommodation market to achieve better spatial distribution and an improved price structure.
- Transferring the relevant rights and duties of commercial providers to holiday flats and sharing accommodation, *e.g., levying the city tax, application of the provisions on fire safety and accessibility.*

Supporting tourism infrastructure and mobility

- Aligning tourism and the airport strategy (targeted acquisition of air routes and airlines with the aim of city-compatible tourism).
- Upgrading the Central Coach Station Berlin (ZOB) as the gateway to the city for intercity coach passengers.
- Drafting a plan to distribute the coach traffic more evenly in the inner city, above all by creating new coach parking outside the busiest areas.
- Integrating other mobility services into the tourist passes (*e.g., hire bikes and bikes on public transport*).

- Adapting/converting the hop-on-hop-off fleet of buses to ensure fuel consumption is as low as possible and emissions are reduced as far as possible.
- Creating mobility services for people with disabilities, *e.g.*, *accessible 'Inclusion Taxis'*, hire bikes for people with disabilities, such as handcycles, tricycles or tandems for people who are blind (with this system integrated, as appropriate, into the public bike hire system).
- Plan for the supplementary infrastructure to support cycle tourism in Berlin (*e.g.*, *signage, bike parking and lock boxes at main sights, stops for guided bike tours at busy places*) as well as intensifying the cooperation on cycle routes between the federal states (Länder) of Brandenburg and Berlin.
- Highlighting the Berlin Wall Trail's value as a lighthouse project for cycle tourism in Berlin and systematically expanding it (further).
- Launching a website to market Berlin's (cross-borough) water trails.
- Expanding the MEET+CHANGE project run by the Berlin Convention Office of *visitBerlin*.

Plans for enhanced security

- Drafting individual security plans, *e.g.*, *for individual*, busy city districts and quarters as part of managing tourism on neighbourhood levels, at rail and tube stations much frequented by tourists, and at major events.
 - Lighting plan for main tourist centres and major events.
- ### **More effectively exploiting potentials in the meetings and conventions sector**
- Repositioning and expanding the Sustainable Meetings Berlin project to create sustainable offers in the conference and congress sector.
 - Acquiring congresses from the medical, scientific and business sectors.

The Sustainable and City-Compatible Berlin Tourism Plan 2018+ has been developed by the Senate Department for Economics, Energy and Public Enterprises in cooperation with *visitBerlin*/Berlin Tourismus & Kongress GmbH with specialist services provided by *dwif*-Consulting GmbH and Humboldt-Innovation GmbH.



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