Quality Monitor
Tourism in Germany

Evaluation for Berlin 2021 / 2022

Contents

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About the Quality Monitor for Tourism in Germany

The Quality Monitor for Tourism in Germany is an initiative of Europäische Reiseversicherung and the Deutsche Zentrale für Tourismus e. V. (German National Tourist Board, GNTB).

The purpose of the Quality Monitor is to examine the travel behaviour of domestic and international overnight guests (holidaymakers and business travellers) in Germany.

The basis for this is provided by interviews at the national level, which are supplemented by additional surveys in the participating partner regions. In the ninth year of the survey **(May 2021 to April 2022**), around **7,500 interviews** were conducted **throughout Germany**, including **1,700 in Berlin**.

Source: Quality Monitor Germany

About the Quality Monitor for Tourism in Germany

The Quality Monitor is a long-term project and is updated regularly.

The interviews are conducted according to an individually defined **quota plan** that takes into account the destination's markets of origin, seasonality and accommodation mix. The results are therefore weighted to ensure the representativeness of the data.

This selection of results refers to the **2017/18 survey year** and provides information on the travel behaviour of visitors to Berlin.

Guest mix

Who are the visitors to Berlin and where do they come from?

Origin

German federal state origin of holidaymakers and business travellers

in %

Almost 2/3 of visitors come from the most populous federal states

- 🟥 % share of Berlin visitors 2021/22
- 🟦 % share of the federal state in the total population

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Age

Age of holidaymakers and business travellers

4 %	70 plus
9 %	60 - 69 years
20 %	50 - 59 years
20 %	40 - 49 years
17 %	30 - 39 years
23 %	20 - 29 years
6 %	14 - 19 years

Average age: 41.2 years

Source: Quality Monitor for Tourism in Germany 2021/22
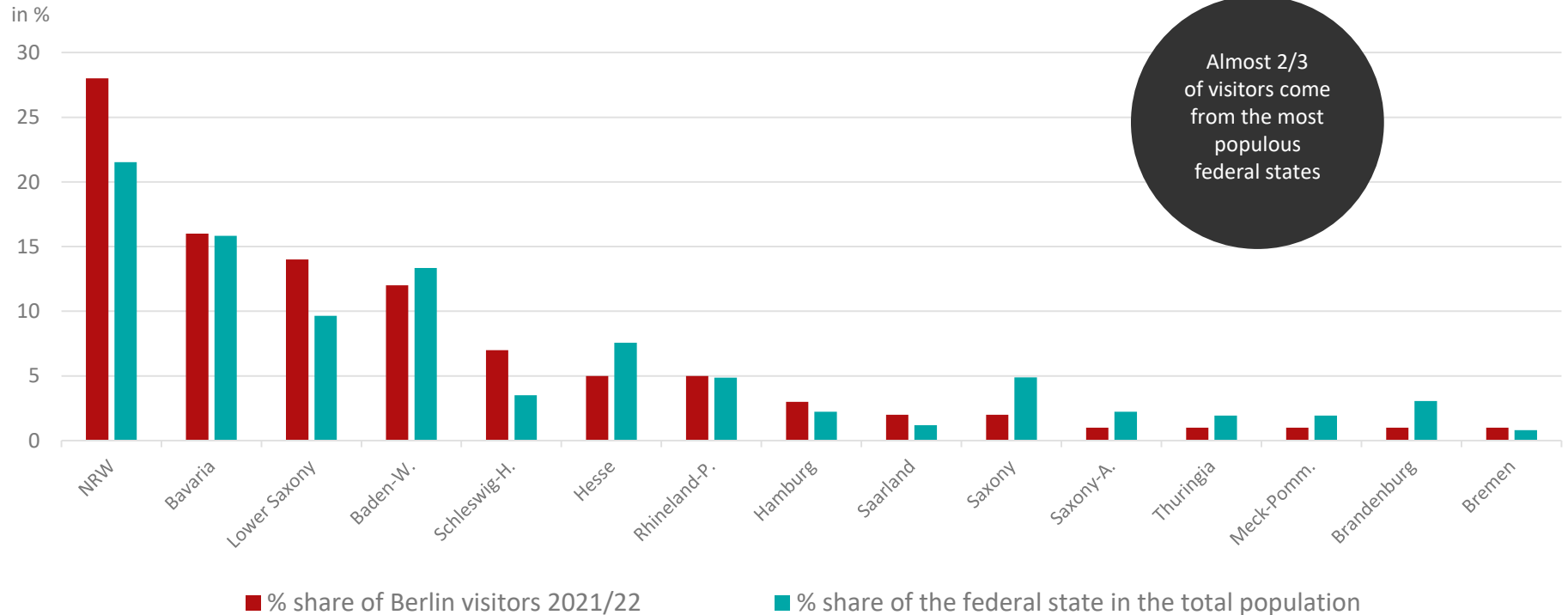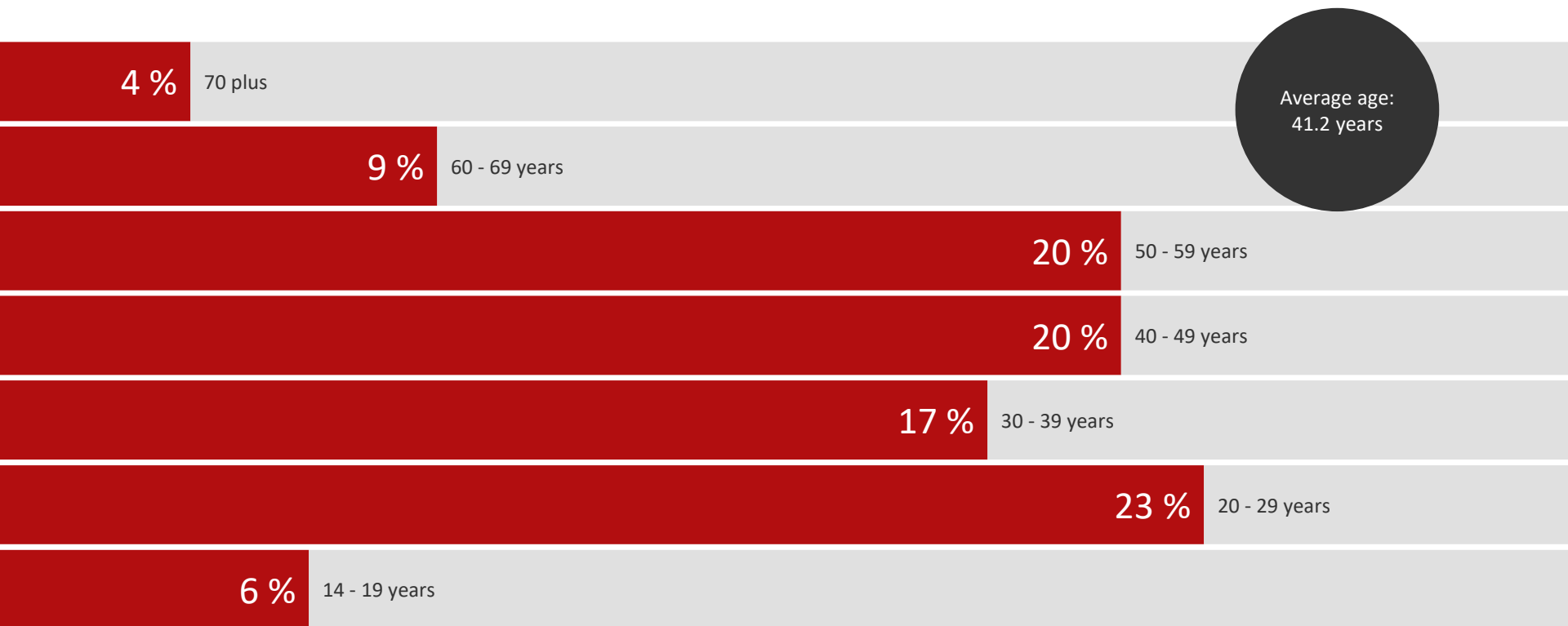
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Age

Age comparison of domestic and international visitors to Berlin

70 plus
- Visitors from Germany: 5%
- Visitors from abroad: 1%

60 - 69 years
- Visitors from Germany: 6%
- Visitors from abroad: 19%

50 - 59 years
- Visitors from Germany: 23%
- Visitors from abroad: 14%

40 - 49 years
- Visitors from Germany: 22%
- Visitors from abroad: 13%

30 - 39 years
- Visitors from Germany: 16%
- Visitors from abroad: 22%

20 - 29 years
- Visitors from Germany: 21%
- Visitors from abroad: 28%

14 - 19 years
- Visitors from Germany: 7%
- Visitors from abroad: 3%

Average age of visitors from Germany: 41.4 Abroad: 40.6 Total: 41.2

■ Visitors from Germany   ■ Visitors from abroad

Source: Quality Monitor for Tourism in Germany 2021/22

Incomes

Net monthly household income of holidaymakers

Income	%
Over € 7,000	9 %
€ 5,000 to € 7,000	14 %
€ 3,000 to € 5,000	29 %
€ 1,200 to € 3,000	38 %
Under € 1,200	11 %

Source: Quality Monitor for Tourism in Germany 2021/22
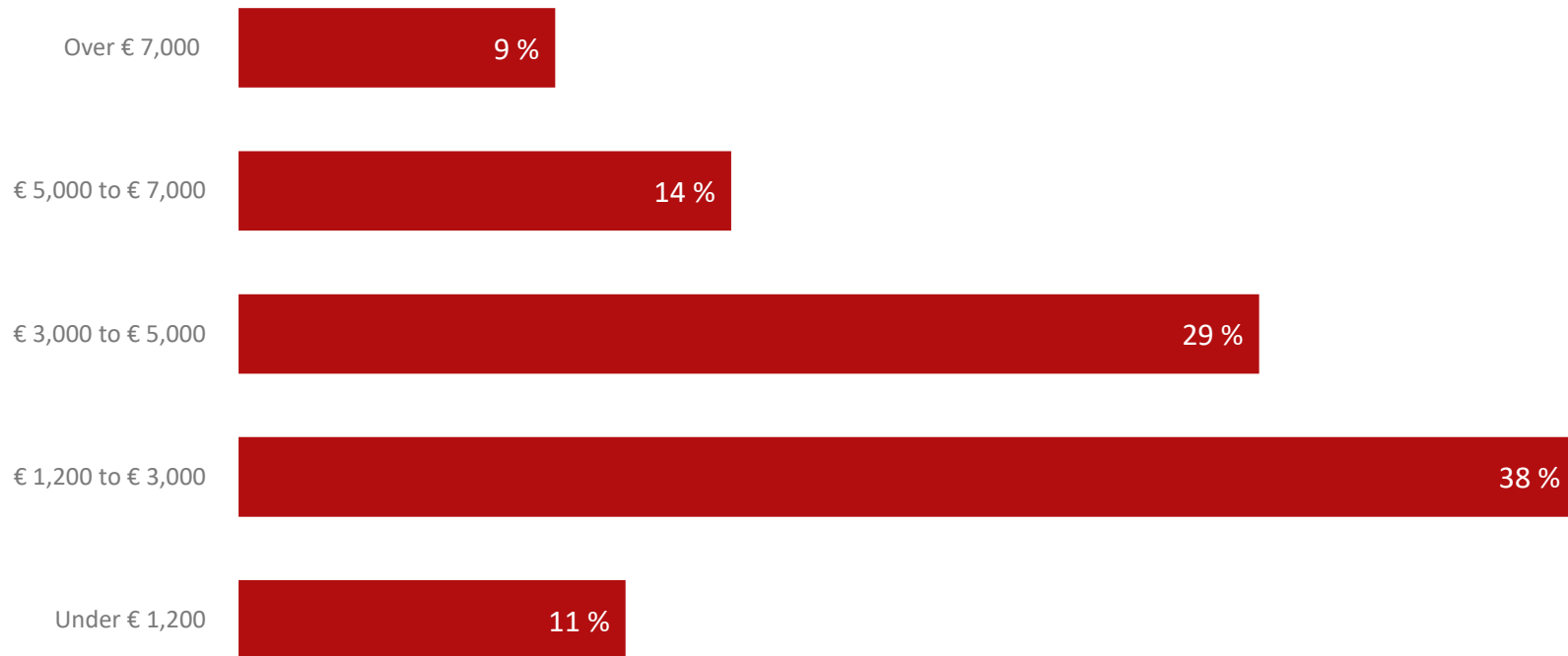
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Visit frequency

Previous stays of holidaymakers in Berlin

Category	Percentage
Several times a year	5 %
Annually	11 %
Every few years	24 %
Once	25 %
Never	35 %

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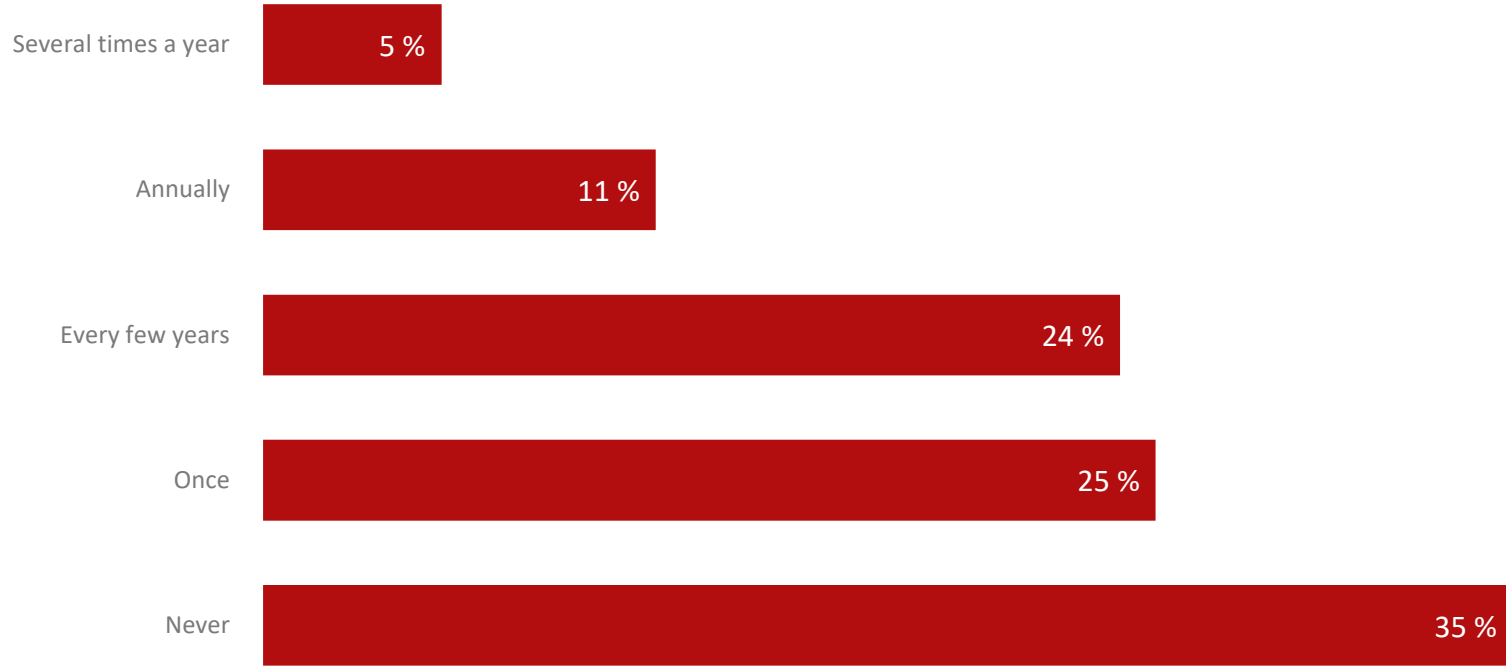
Travel companions

Travel companions for Berlin holidaymakers (grouped)

Category	Percentage
partner (couple)	35%
Friends / acquaintances / colleagues	17%
Child(dren) between 6 and 13 years	14%
alone / unaccompanied	9%
Child(ren) teens / adulthood	9%
Extended family groups	7%
Child(dren) under 6 years	4%
Tour groups	3%
Extended family	1%
partner and other couples	1%
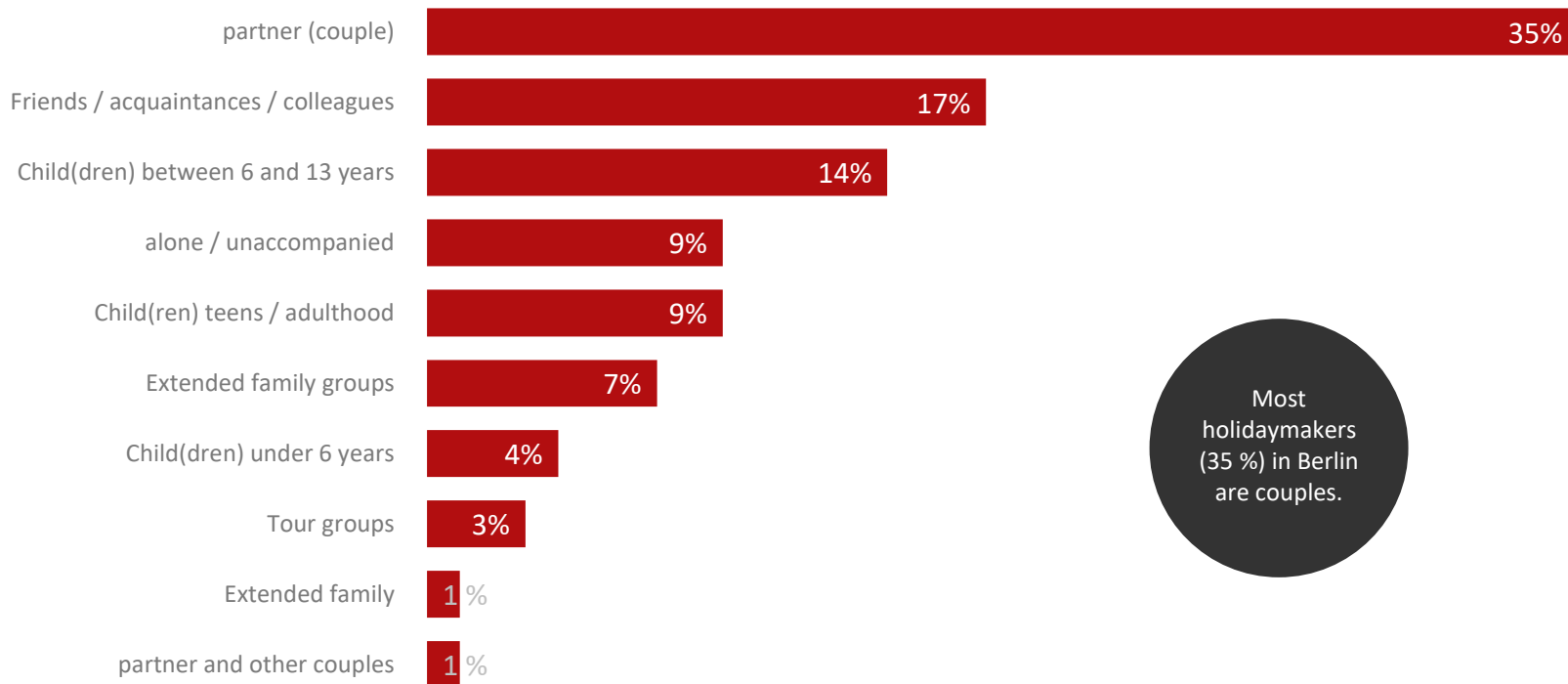
Most holidaymakers (35 %) in Berlin are couples.

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© Getty images, photo: elxeneize

Information | Booking | Decision

When and where do guests get information?

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Sources of information

Sources of information for holidaymakers (or their travel companions)

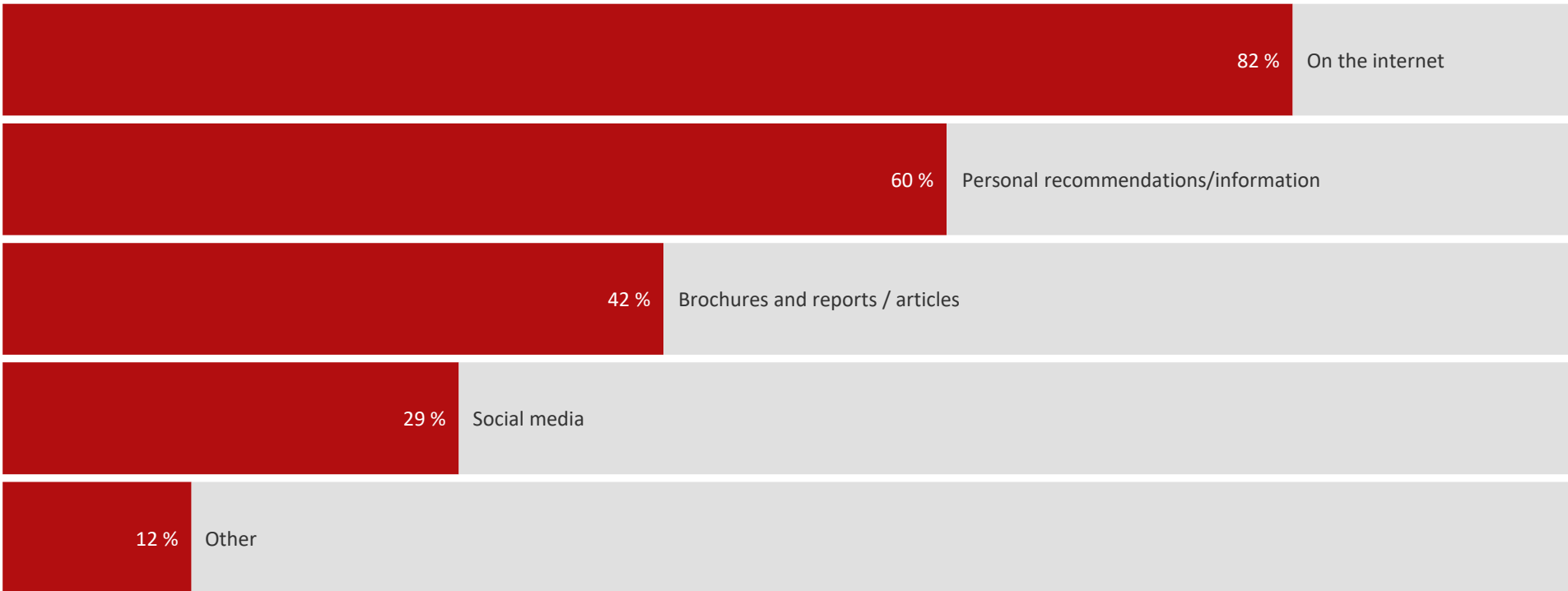|	
82 %	On the internet
60 %	Personal recommendations/information
42 %	Brochures and reports / articles
29 %	Social media
12 %	Other

Sources of information - platforms

Sources of information for holidaymakers (or their travel companions)

Platform	Percentage
Youtube/Vimeo	37 %
Instagram	37 %
Facebook	33 %
Google+	30 %
Snapchat	13 %
Pinterest	12 %
TikTok	11 %
Twitter	7 %
Other Platforms	6 %
Reddit	3 %
WeChat	1 %
Sina Weibo	0 %

Source: Quality Monitor for Tourism in Germany 2021/22

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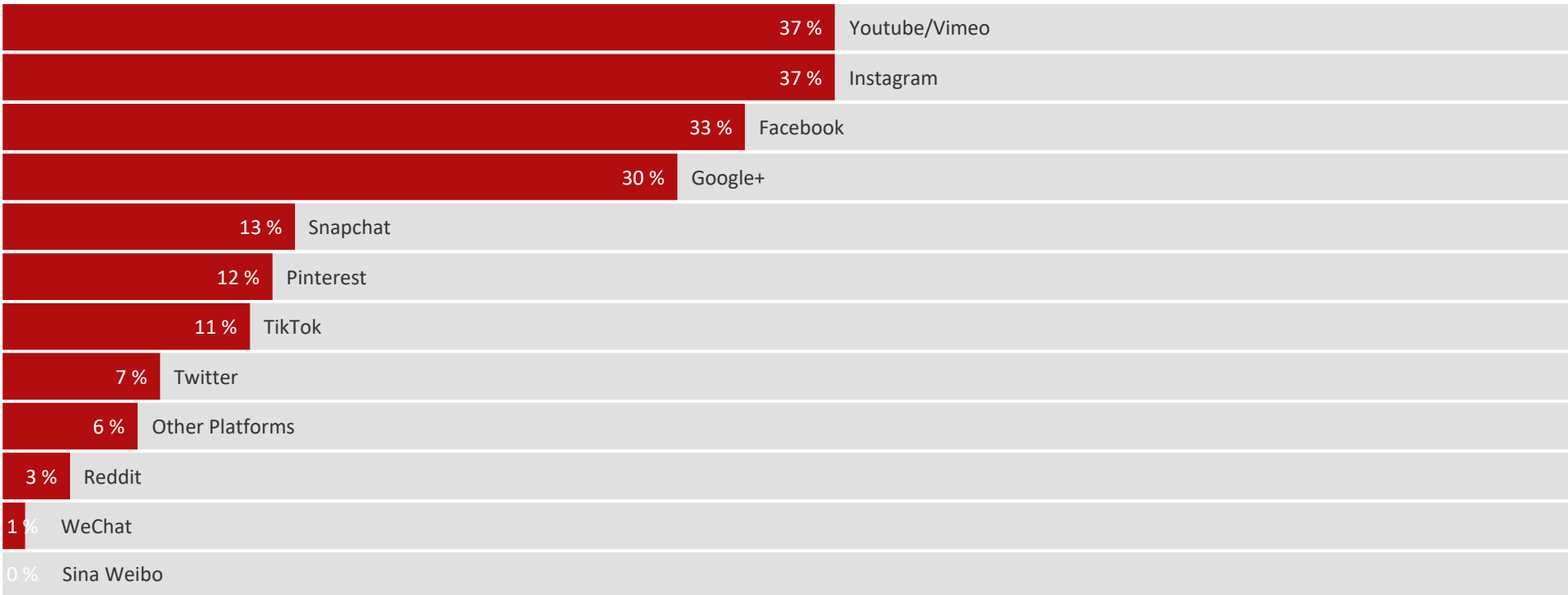
Booking time

Zeitlicher Vorlauf der Reisebuchung (holidaymakers)

Longer than 6 months	2 %
> 3 - 6 months	3 %
> 1 - 3 months	22 %
> 2 – 4 months	34 %
> 1 – 2 weeks	13 %
Spontaneously, up to 1 week	27 %

Source: Quality Monitor for Tourism in Germany 2021/22
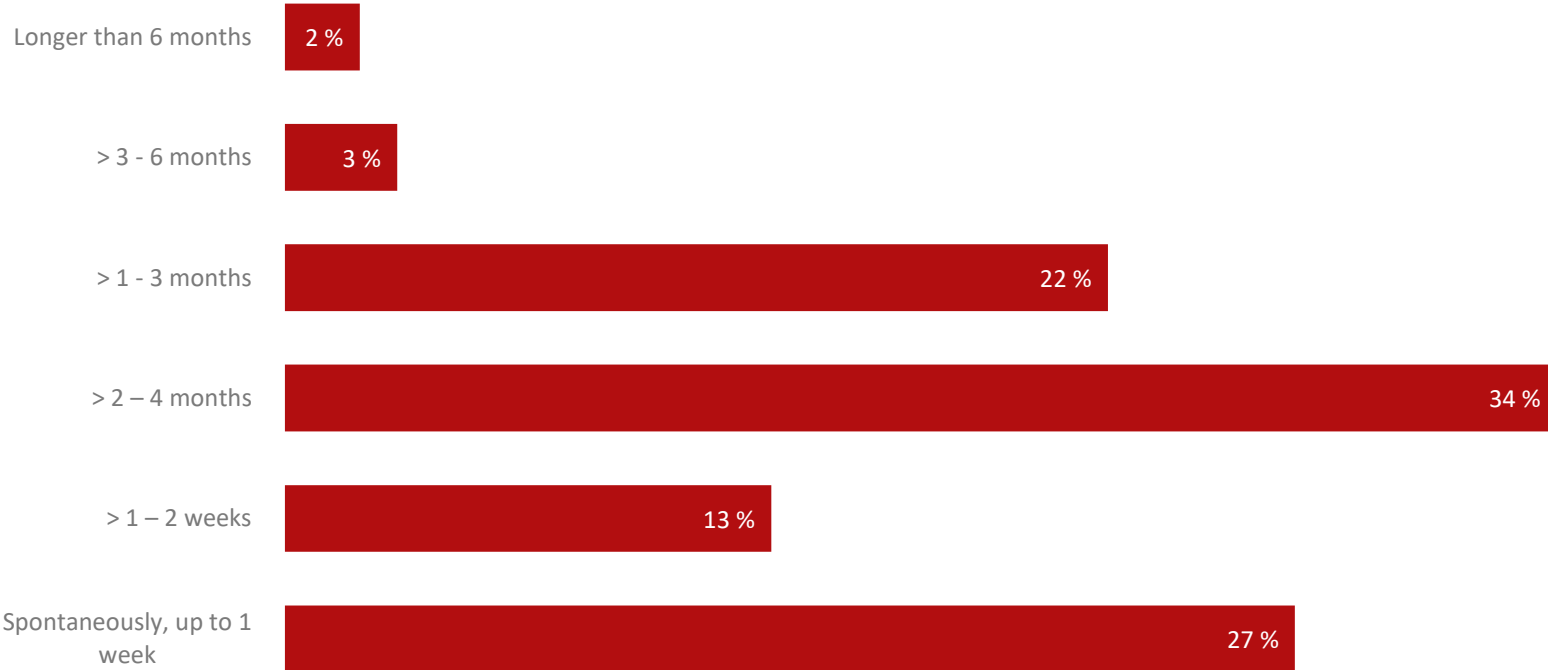
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Destination decision

TOP 10 reasons to visit for holidaymakers

74 %	Places of interest
57 %	Variety & quality of the range of activities
52 %	Art and cultural scene
44 %	Cityscape / architecture
37 %	Tradition / history of the region / city
27 %	Shopping opportunities
25 %	Recommendation from friends / acquaintances
25 %	Atmosphere / flair
24 %	Good experience in the past
23 %	Image of the region / city

Places of interest, art and cultural offerings are the main reason for travel.

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Photo: © Rocco Forte Hotel de Rome

Stay – arrival method, duration, type of accommodation, activities

How do visitors arrive, how long and where do they stay?
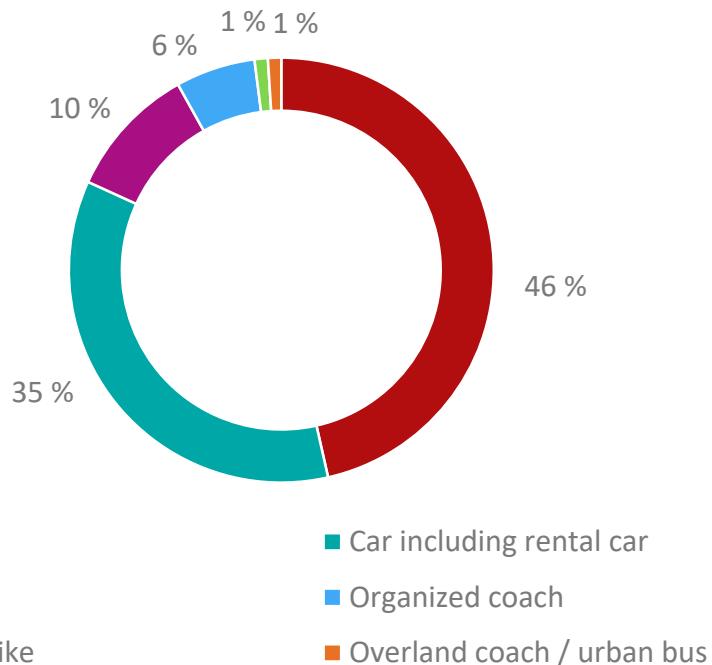What do visitors to Berlin do in the capital?

Means of transport

Arrival of holidaymakers

1 % 1 %
6 %
10 %
46 %
35 %

- Train
- Car including rental car
- Plane
- Organized coach
- Motorbike
- Overland coach / urban bus

Development 2019/20 versus 2021/22			
Means of transport	2019/20	2021/22	Development
Train	29 %	**46 %**	↑ +17
Car (including rental car)	22 %	**35 %**	↑ +13
Plane	38 %	**10 %**	↓ -28
Bus	10 %	**7 %**	↓ -3

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Means of transport

Arrival of German holidaymakers

- ■ Train
- ■ Plane
- ■ Overland coach / urban bus
- ■ Car including rental car
- ■ Organized coach

51 %
42 %
5 %
2 %
1 %
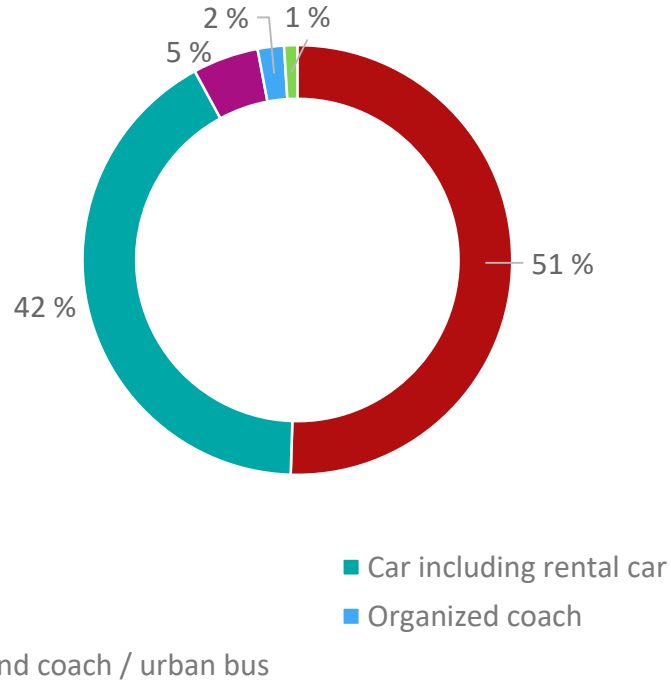
Development 2019/20 versus 2021/22			
Means of transport	2019/20	2021/22	Development
Train	12 %	**51 %**	⬆ +39
Car (including rental car)	26 %	**42 %**	⬆ +16
Plane	25 %	**5 %**	⬇ -20
Bus	12 %	**3 %**	⬇ -9

Source: Quality Monitor for Tourism in Germany 2021/22

Means of transport

Arrival of international holidaymakers

5 %

15 %

29 %

21 %

28 %

- Train
- Plane
- Organized coach
- Car including rental car
- Motorbike
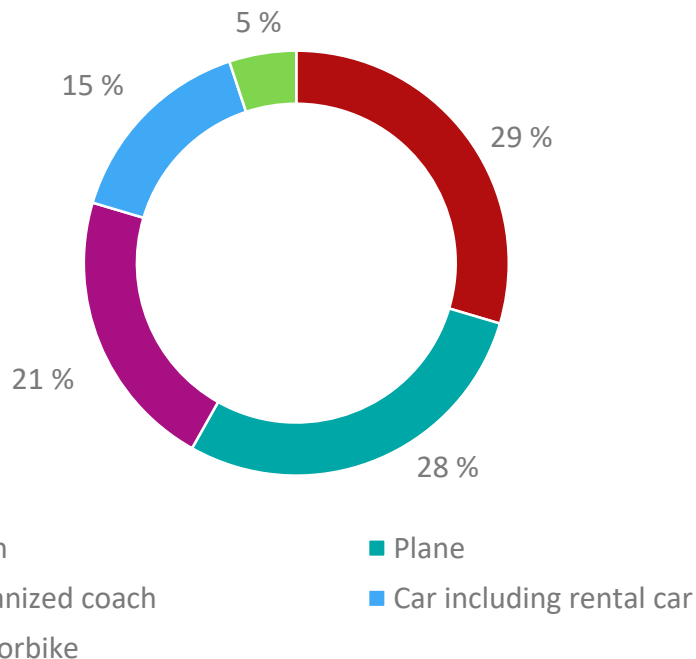
Development 2019/20 versus 2021/22			
Means of transport	2019/22	2021/22	Development
Train	19 %	**29 %**	⬆ +10
Plane	55 %	**28 %**	⬇ -27
Bus	8 %	**23 %**	⬆ +15
Car (including rental car)	18 %	**15 %**	⬇ -3

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Length of stay

Comparison of the length of stay of holidaymakers and business travellers

Up to 3 nights
- Holidaymakers: 57%
- Business travellers: 73%

4 to 7 nights
- Holidaymakers: 40%
- Business travellers: 25%

8 to 14 nights
- Holidaymakers: 2%
- Business travellers: 3%

longer than 14 nights
- Holidaymakers: 1%
- Business travellers: 0%

Legend: ■ Holidaymakers ■ Business travellers

Source: Quality Monitor for Tourism in Germany 2021/22

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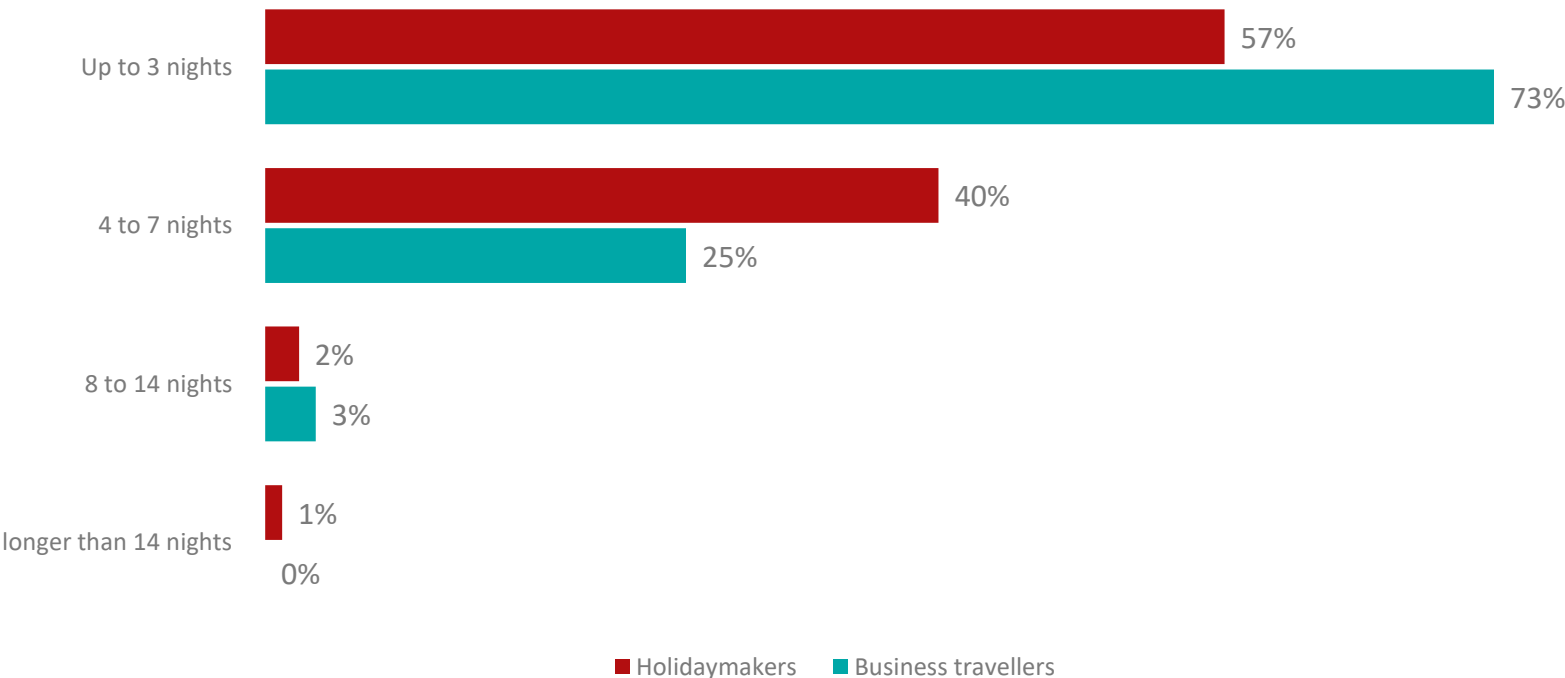
Length of stay

Comparison of length of stay of domestic and international holidaymakers

Up to 3 nights
- International guests: 55%
- Domestic guests: 52%

4 to 7 nights
- International guests: 36%
- Domestic guests: 45%

8 to 14 nights
- International guests: 6%
- Domestic guests: 3%

Longer than 14 nights
- International guests: 4%
- Domestic guests: 1%

International holidaymakers tend to stay a little longer in Berlin.

■ International guests   ■ Domestic guests

Source: Quality Monitor for Tourism in Germany 2021/22

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Accommodation category

Star category of accommodation for holidaymakers and business travellers

	Holidaymakers	Business travellers
5 stars	6%	11%
4 stars	34%	41%
3 stars	28%	17%
1 to 2 stars	5%	6%
don't know / not categorised	27%	26%

■ Holidaymakers ■ Business travellers
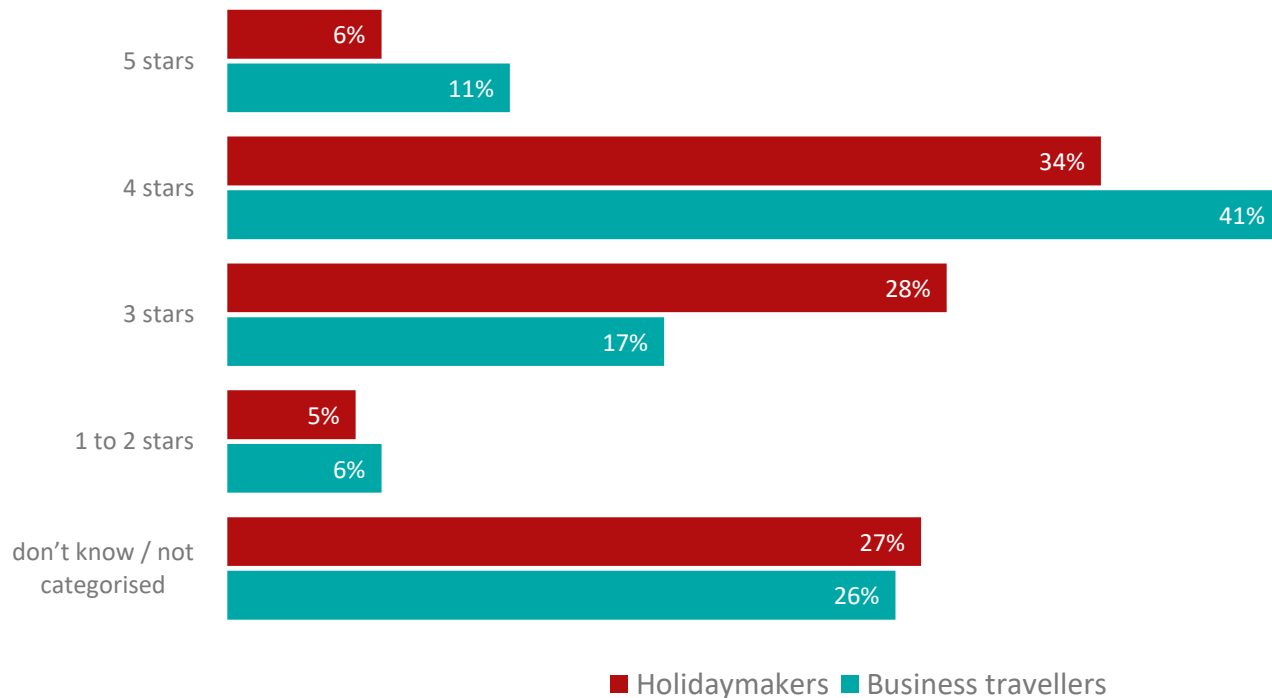
4 and 3-star hotels are by far the most popular accommodation category.

Source: Quality Monitor for Tourism in Germany 2021/22

Activities

Time comparison of length of stay for domestic and international holidaymakers

Activity	International holidaymakers	Domestic holidaymakers
Visiting sights	91%	94%
Going to restaurants / cafés	58%	62%
Strolling / window shopping	50%	56%
Museums / exhibitions	53%	41%
Guided tours	48%	29%
Enjoying local and regional dishes / drinks	42%	21%
Excursions by boat	8%	21%
Doing nothing / relaxing	26%	20%
Bars / clubs / nightlife	22%	17%
Shopping (excluding daily needs)	20%	14%
Cultural events (theatre / cabaret)	9%	12%
Festivals / Events	3%	8%
Excursions outside the holiay destination	3%	7%
UNESCO World Natural and Cultural Heritage sites	13%	6%
Events with classical music, opera	5%	3%
Pop- / rock concerts	3%	2%

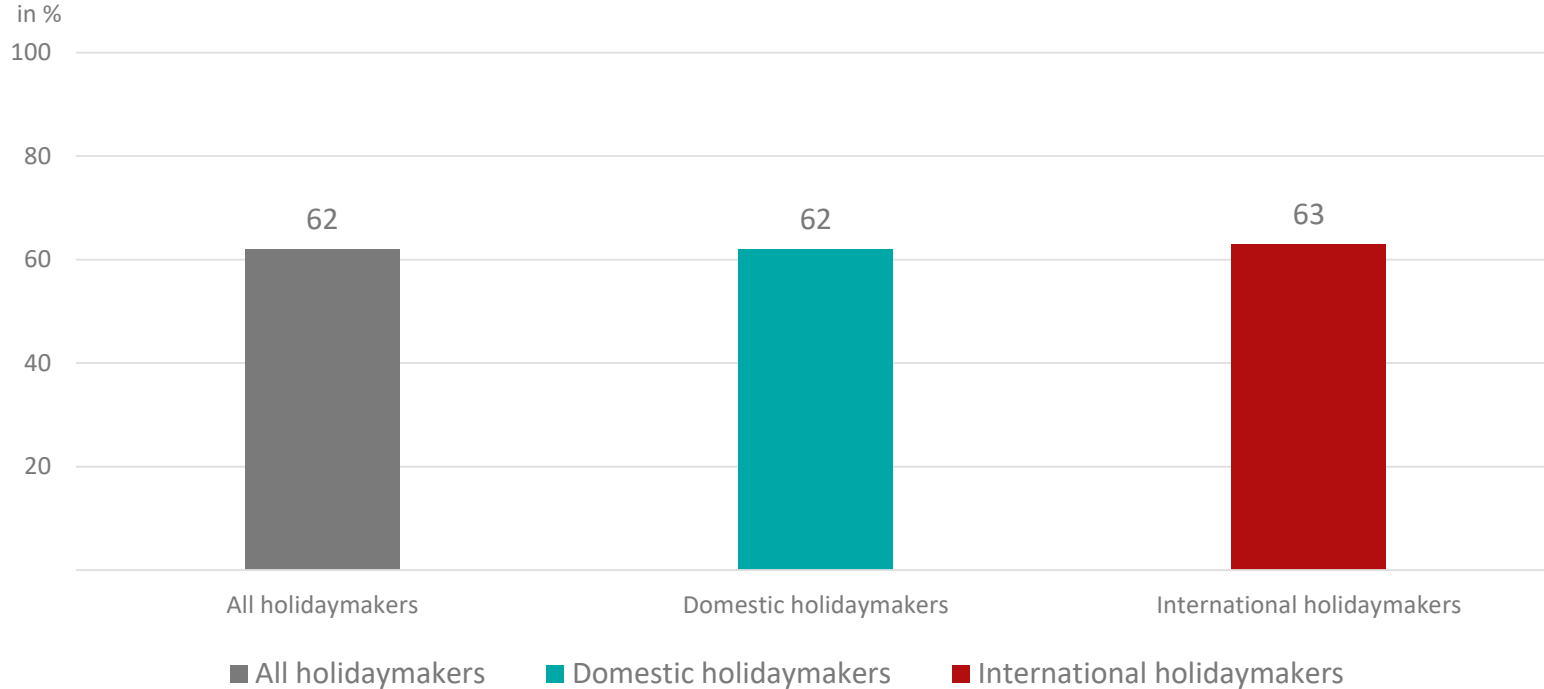© Photo: visitBerlin, Wolfgang Scholvien

Intention to visit again and to recommend to others

With how much certainty will visitors come to Berlin again in the future?
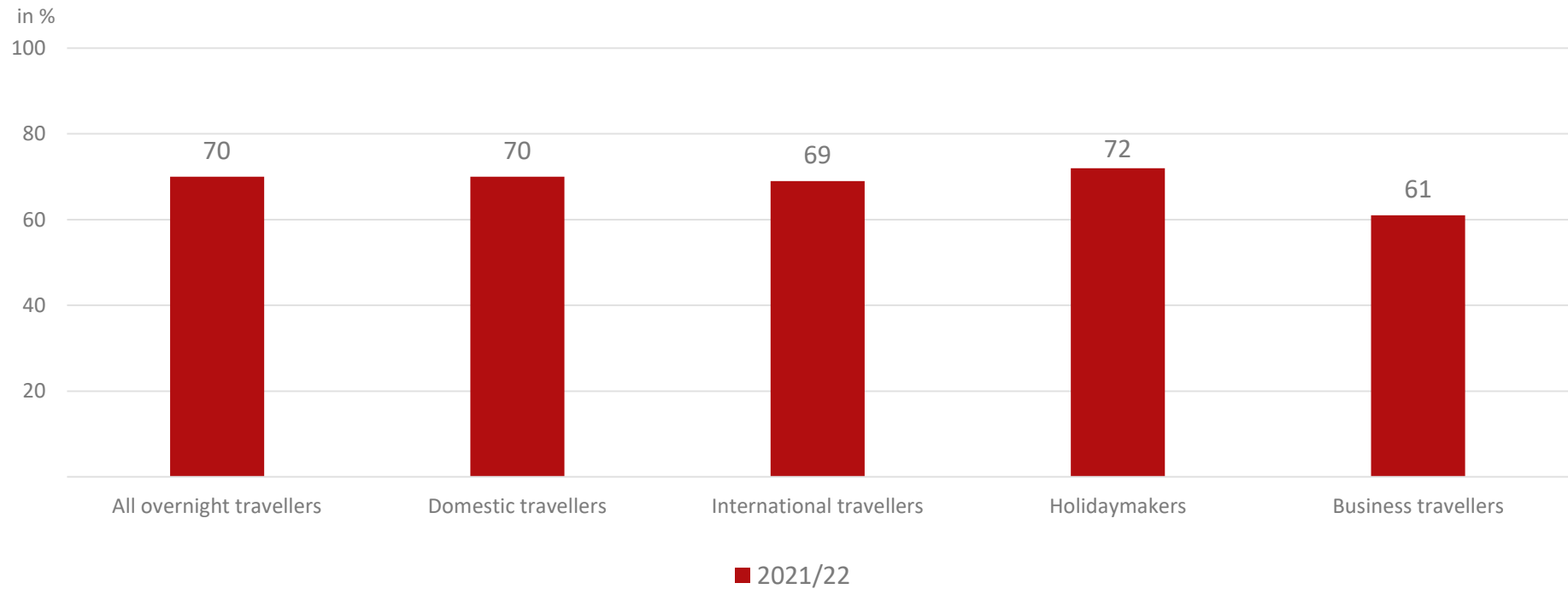With how much certainty will visitors recommend a stay in the capital?

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Intention to revisit

Percentage of holidaymakers who, according to their own information,
are "very certain" or "certain" that they will travel back to Berlin in the next 2-3 years

in %

Legend		
■ All holidaymakers	■ Domestic holidaymakers	■ International holidaymakers

Source: Quality Monitor for Tourism in Germany 2021/22

Intention to recommend

Percentage of holidaymakers who are "very certain" or "certain" that they will recommend a stay in Berlin

in %

	2021/22

Source: Quality Monitor for Tourism in Germany 2021/22

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Evaluation for Berlin 2021/22

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