

Quality Monitor Tourism in Germany

Evaluation for Berlin 2021/ 2022

internal version:
status
14.07.2022

Content

Excerpts from the database

- 1 About the Quality Monitor for Tourism in Germany
- 2 Guest mix
- 3 Information, decision-making and booking behaviour
- 4 Stay – arrival method, duration, type of accommodation, activities
- 5 Contentment, Intention to visit again and to recommend to others
- 6 Appendix: Methodological notes



About the “Quality Monitor for Tourism in Germany”

The Quality Monitor Germany Tourism is an initiative of the Europäische Reiseversicherung and the Deutsche Zentrale für Tourismus e. V. (DZT).

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**.

About the Quality Monitor for Tourism in Germany

The Quality Monitor (since 2007) 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 relates to the **survey year 2021/22** and provides information on the travel behavior of visitors to Berlin.

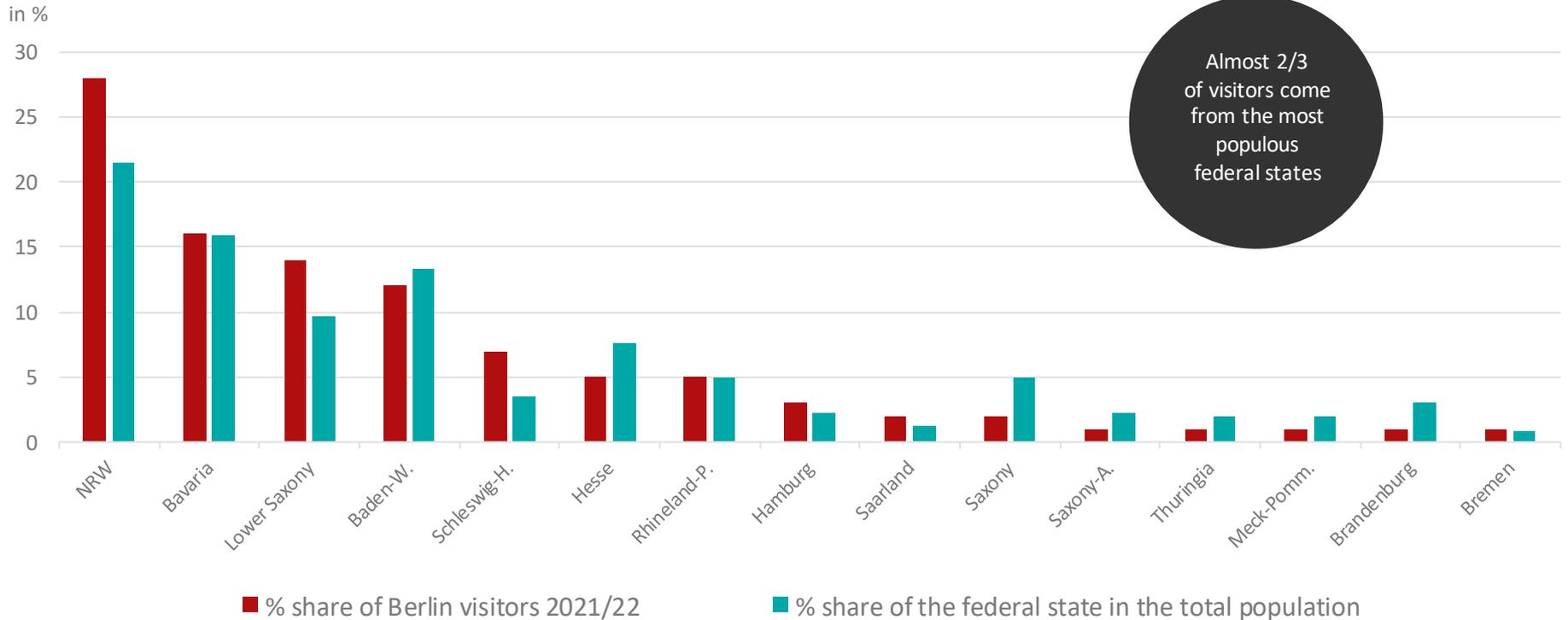


Guest structure

Overnight visitors in Berlin

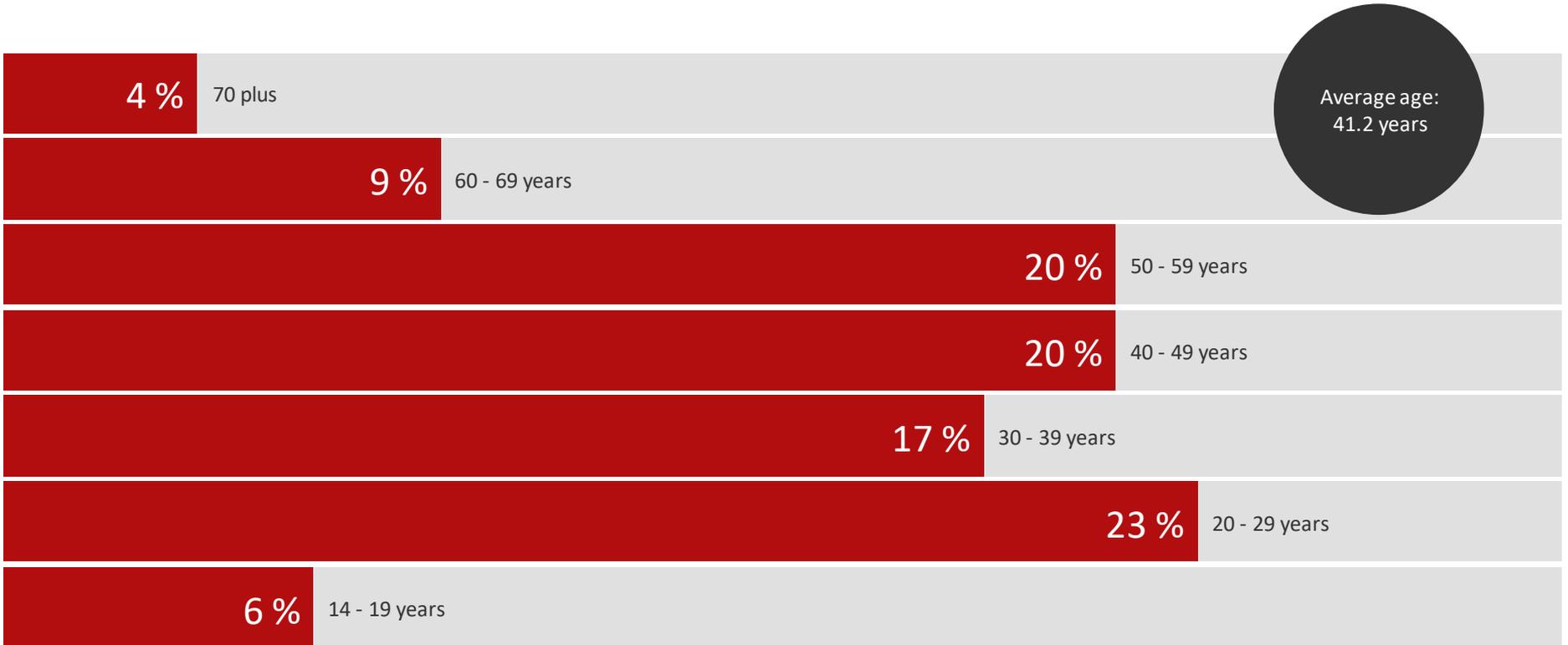
Origin

German federal state origin of holidaymakers and business travellers



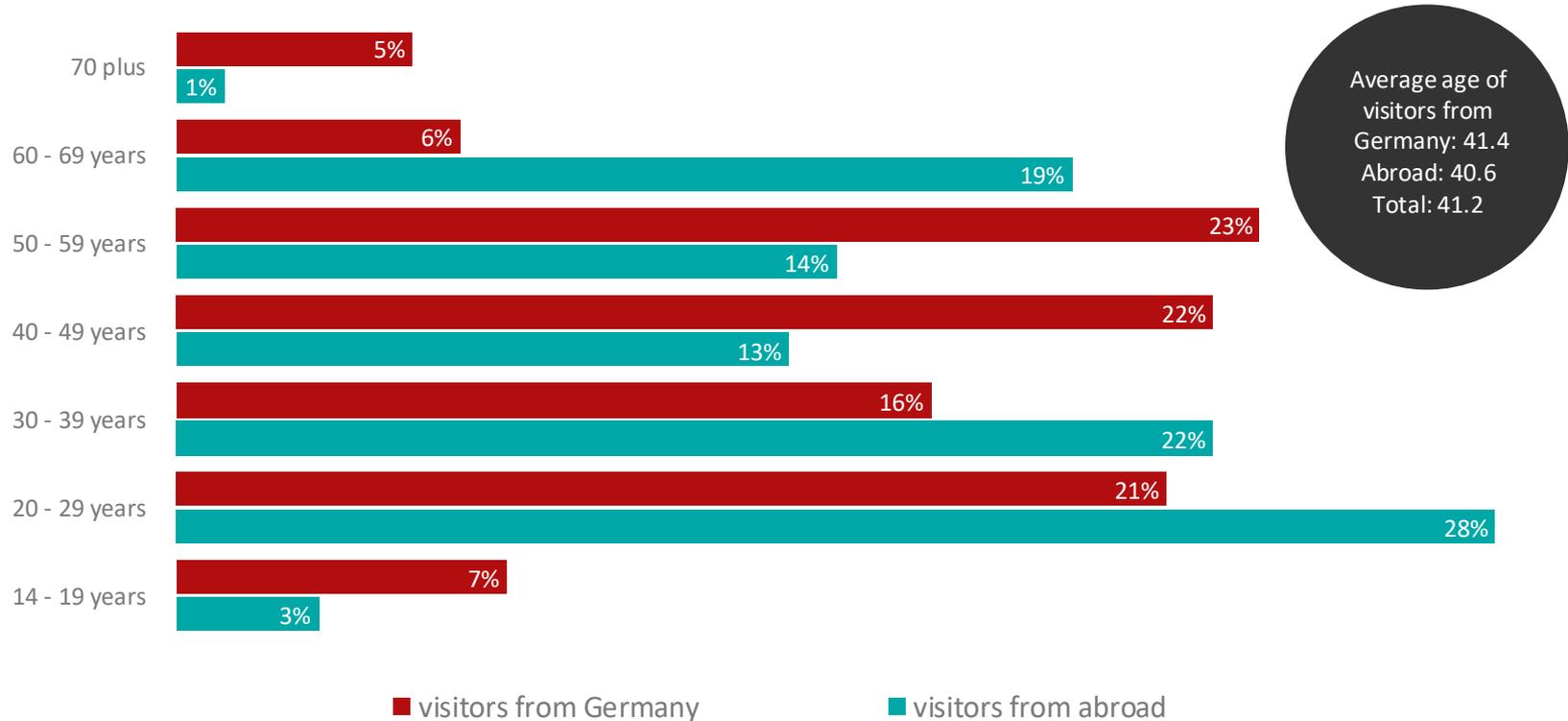
Age

Age of holidaymakers and business travellers



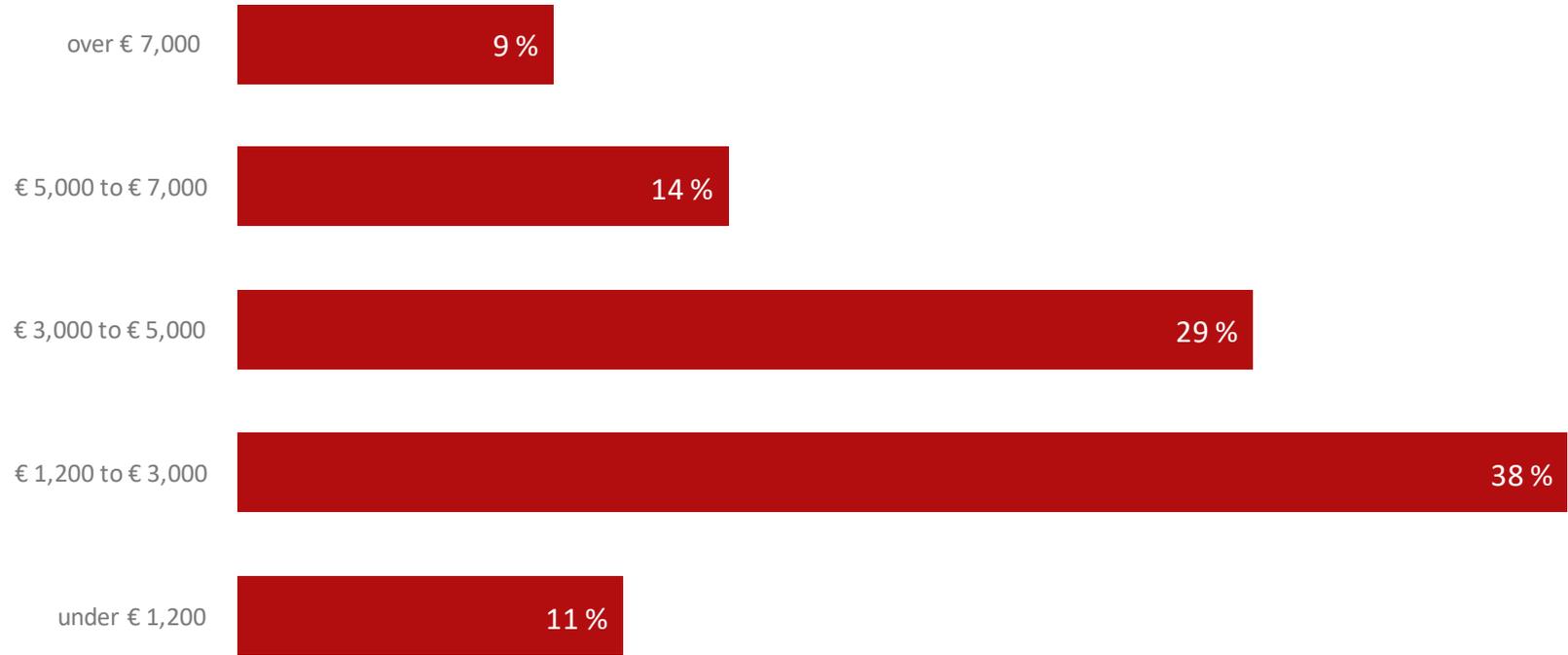
Age

Age comparison of domestic and international visitors to Berlin



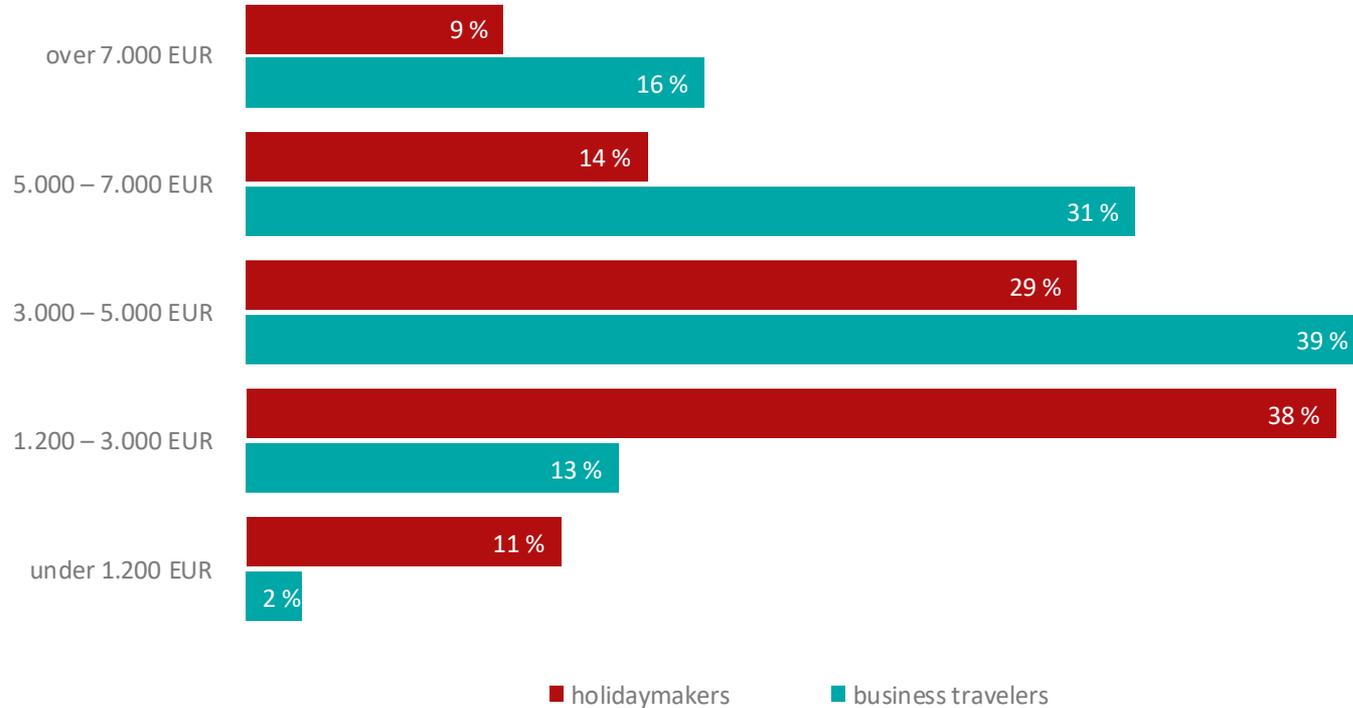
Incomes

Net monthly household income of holidaymakers



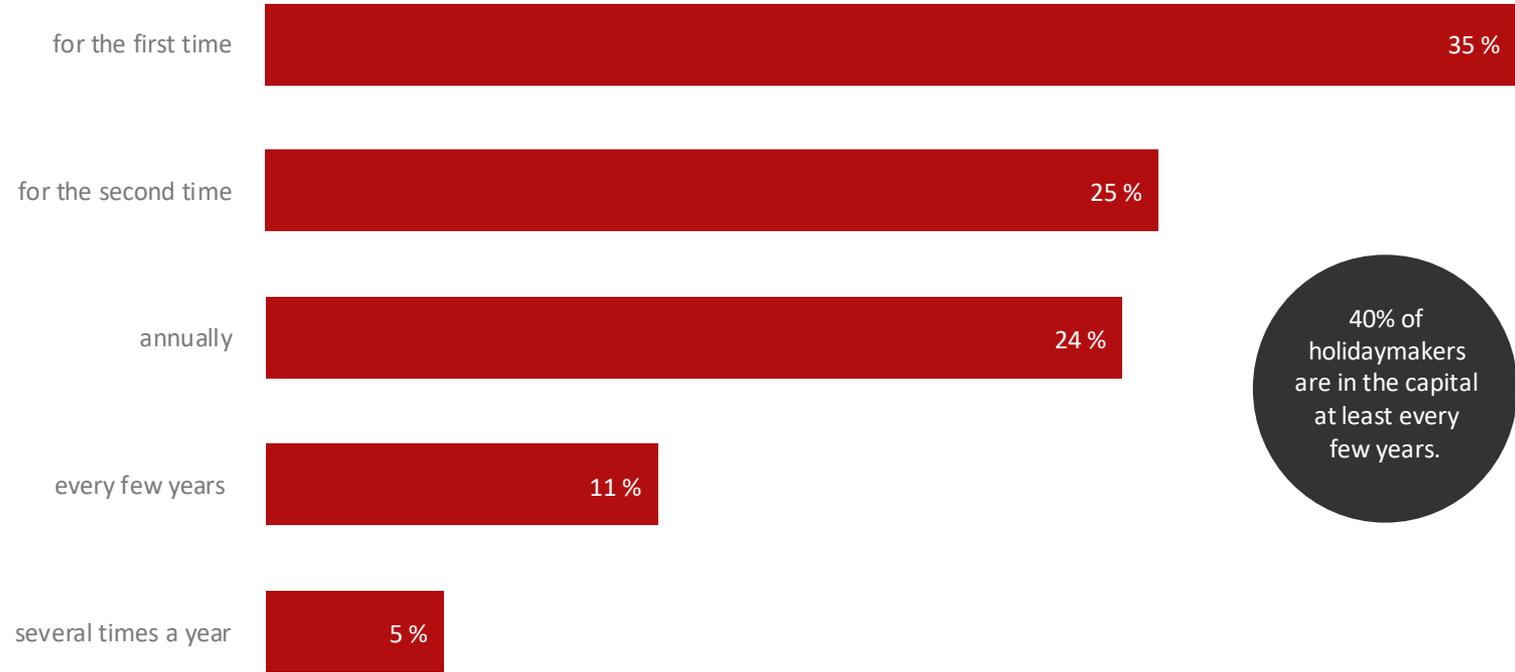
Incomes

Net monthly household income 2021/22 (vacationers vs. business travelers)



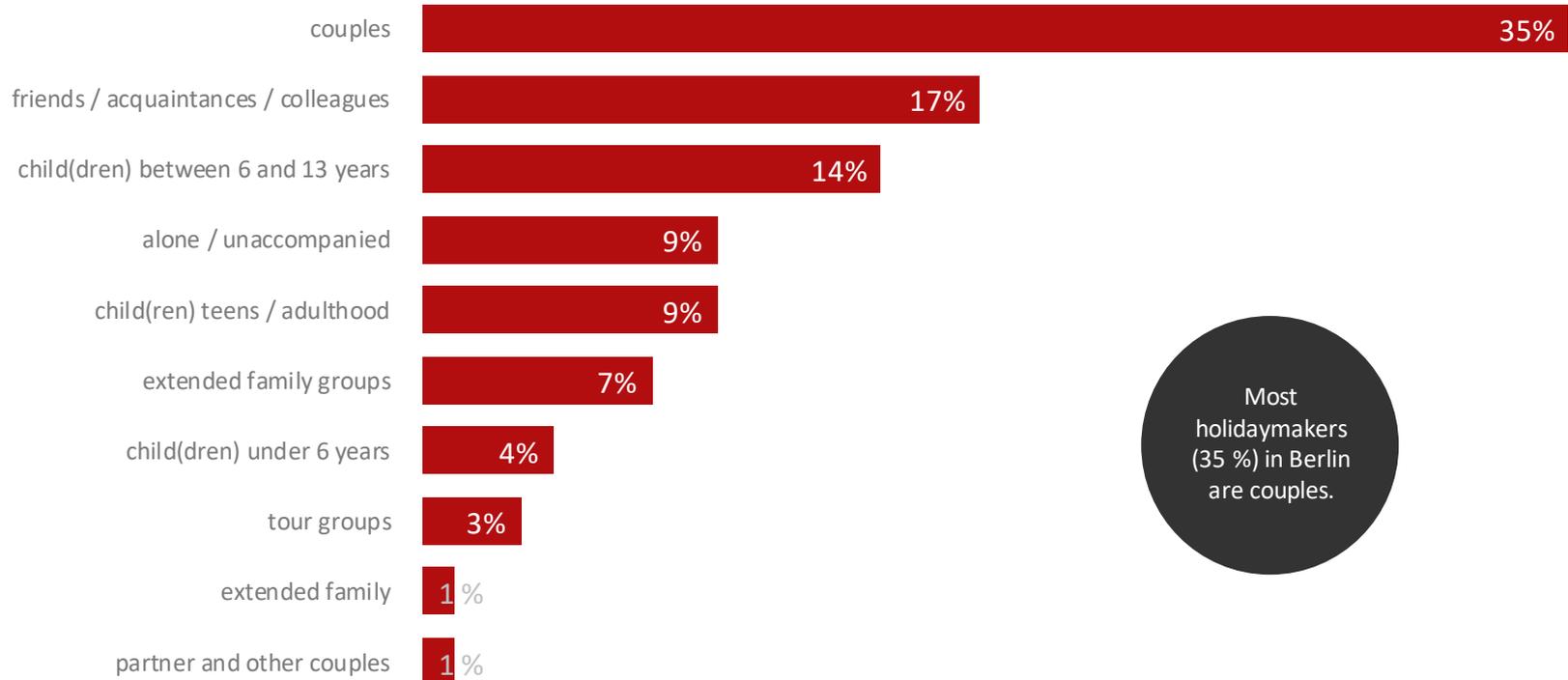
Visit frequency

Previous stays of holidaymakers in Berlin



Travel companions

Travel companions for Berlin holidaymakers (grouped)



Most holidaymakers (35 %) in Berlin are couples.

Travel companions

Travel companion business traveler (grouped)





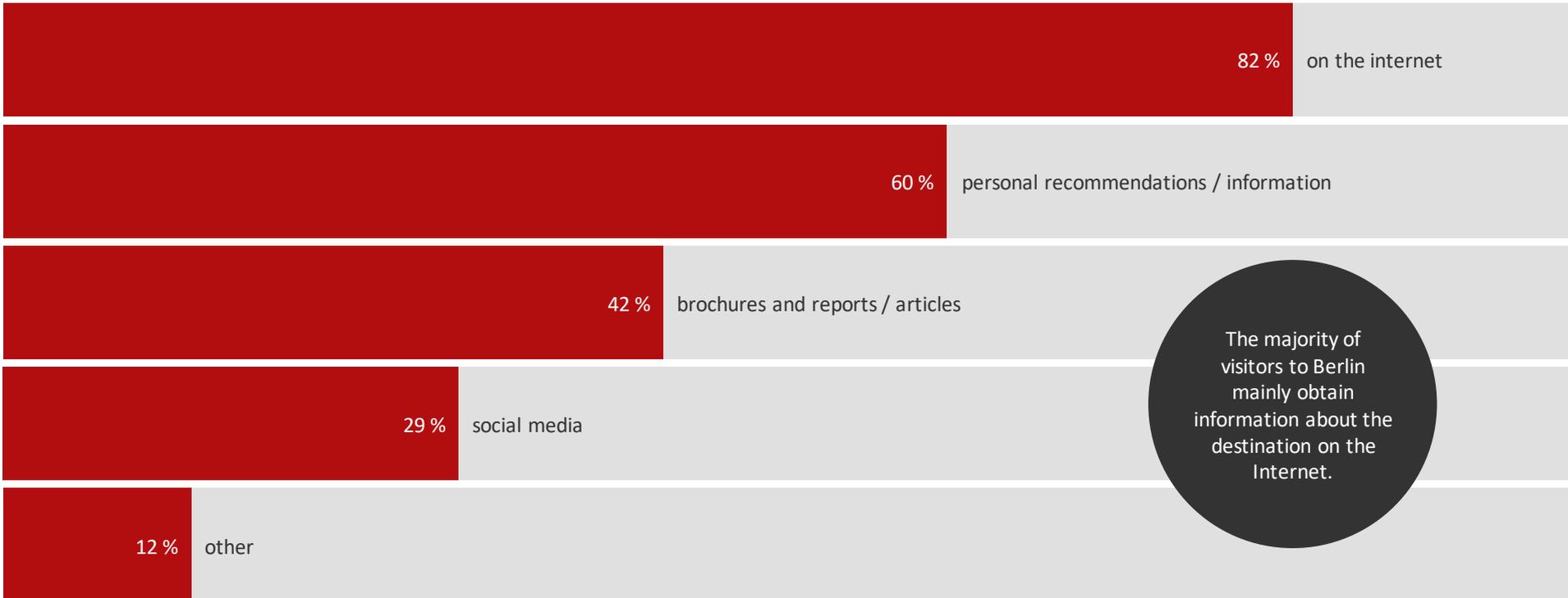
© Getty Images, photo: elkenize

Information | Booking | Decision

When and where do guests get information?

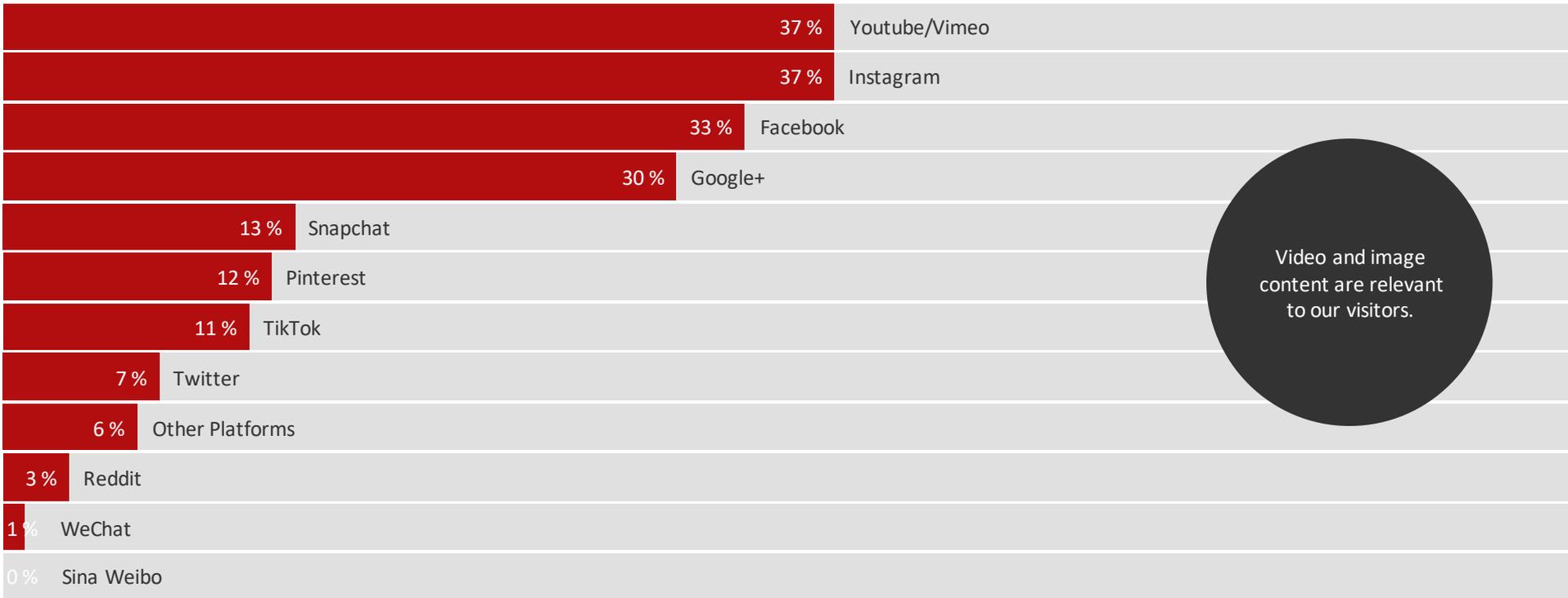
Sources of information

Sources of information for holidaymakers (or their travel companions)



Sources of information - platforms

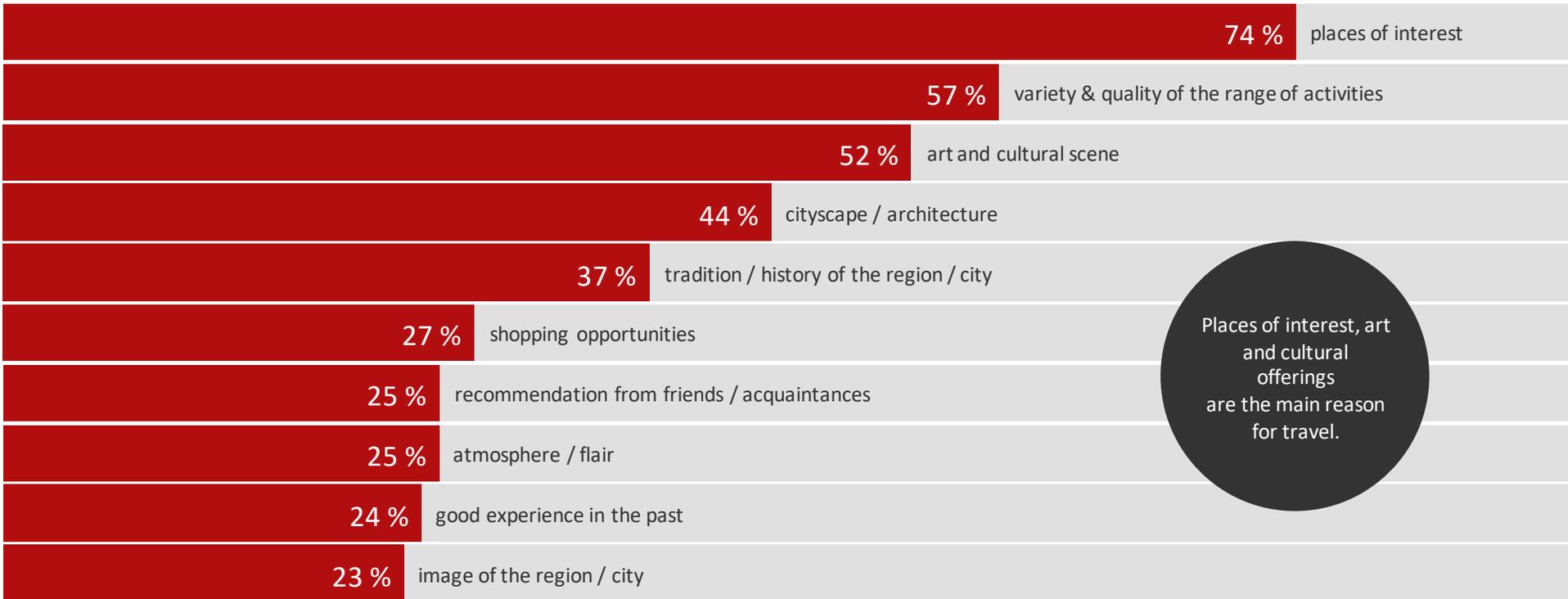
Platforms used by vacation guests



Video and image content are relevant to our visitors.

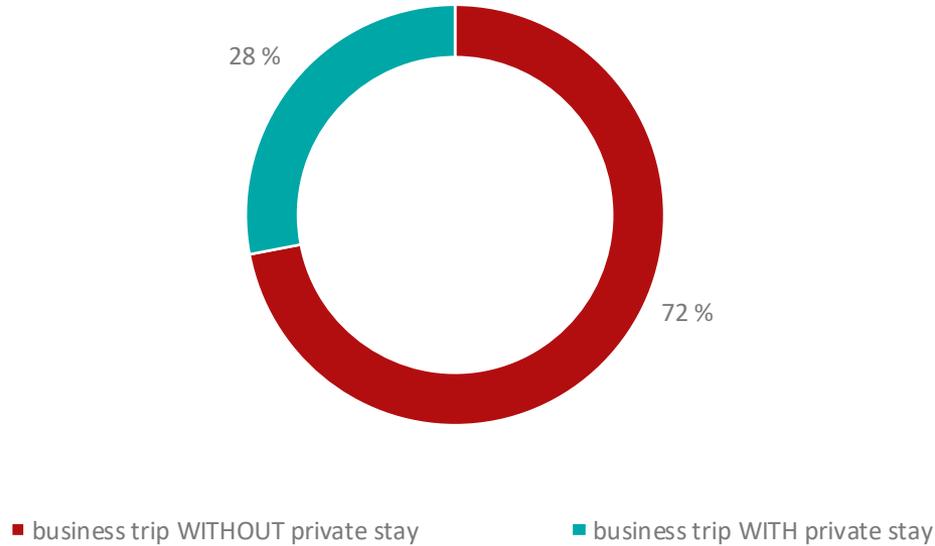
Destination decision

TOP 10 reasons to visit for holidaymakers



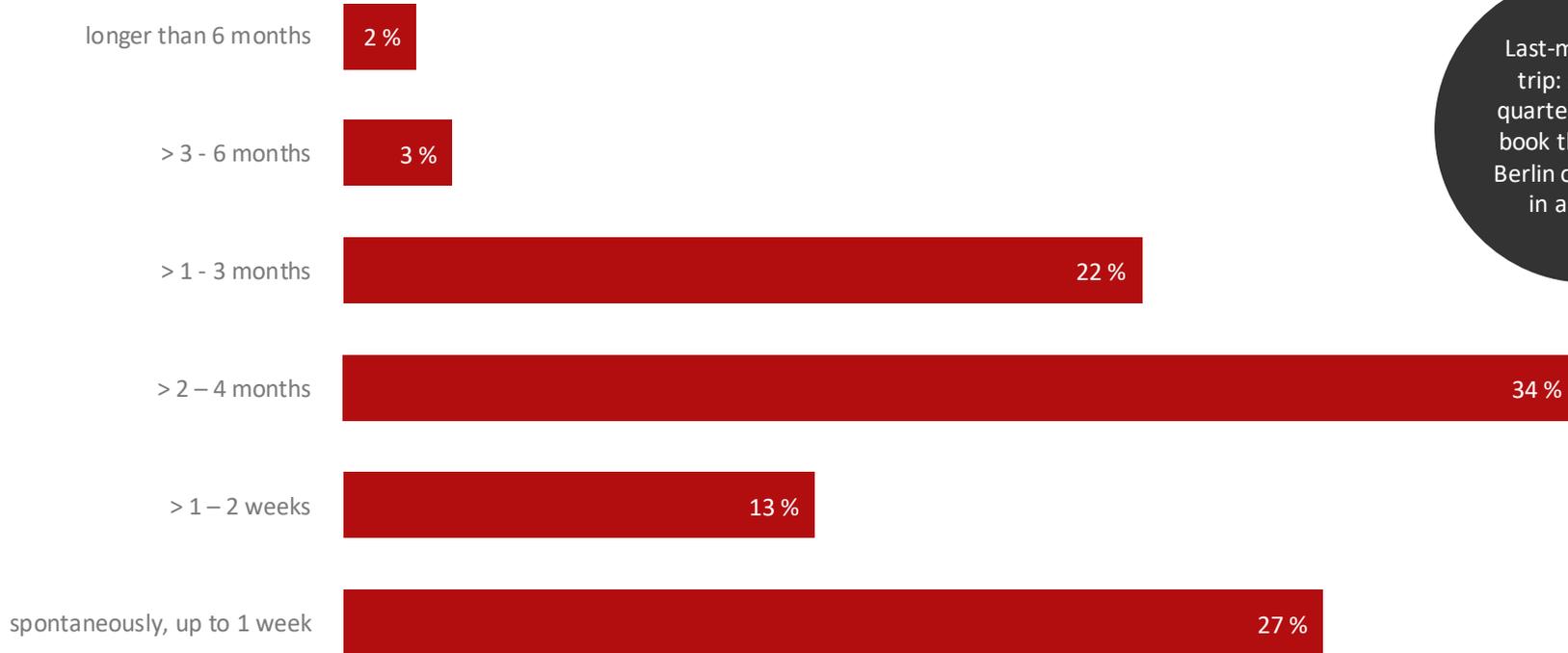
Travel motive

main travel motive of business travelers



Booking time

Time advance of the travel booking (holidaymakers)



Last-minute city trip: around a quarter of visitors book their trip to Berlin only a week in advance.

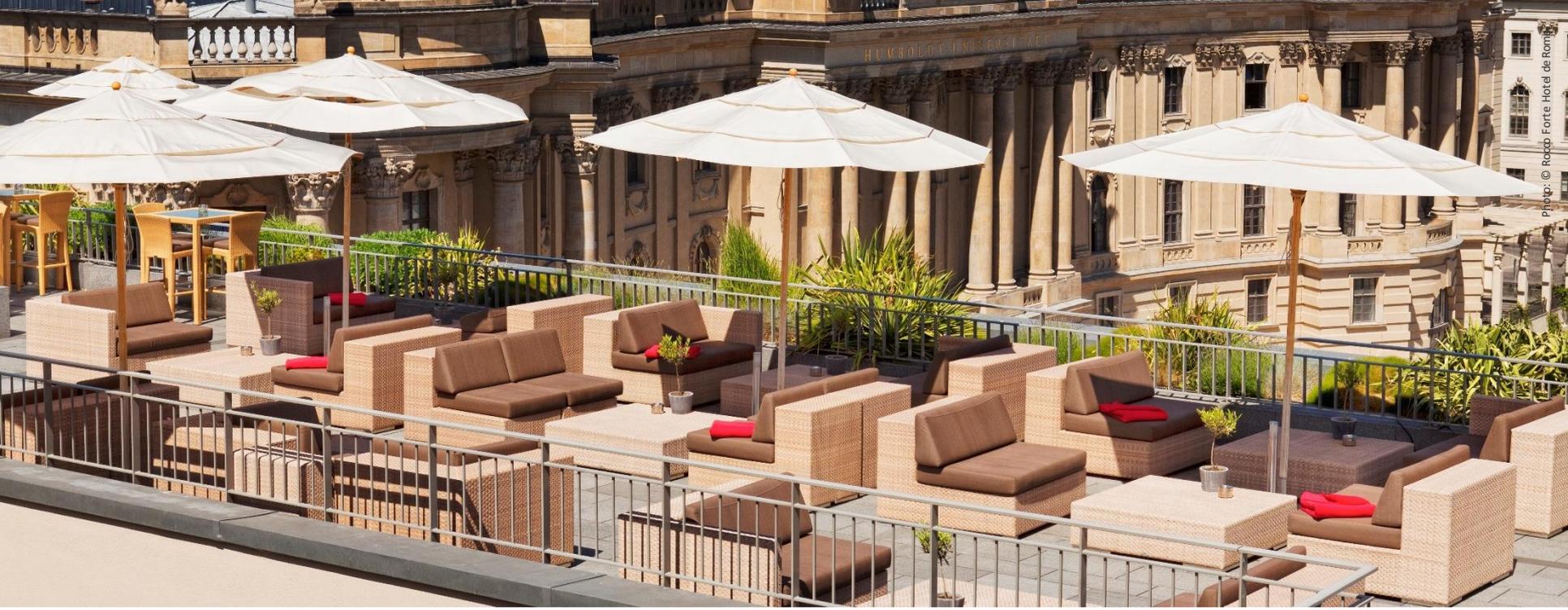


Photo: © Rocap Forte Hotel de Rome

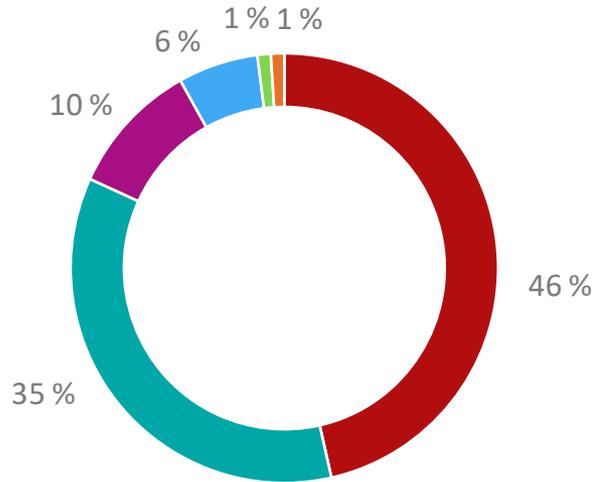
Stay – arrival method, duration, type of accommodation, activities

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



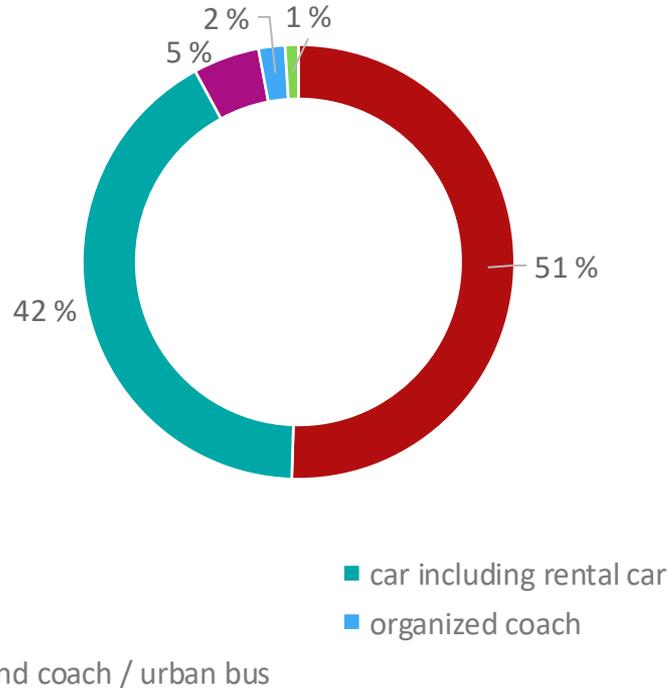
- train
- car including rental car
- plane
- organized coach
- motorbike
- overland coach / urban bus

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

Means of transport

Arrival of German holidaymakers

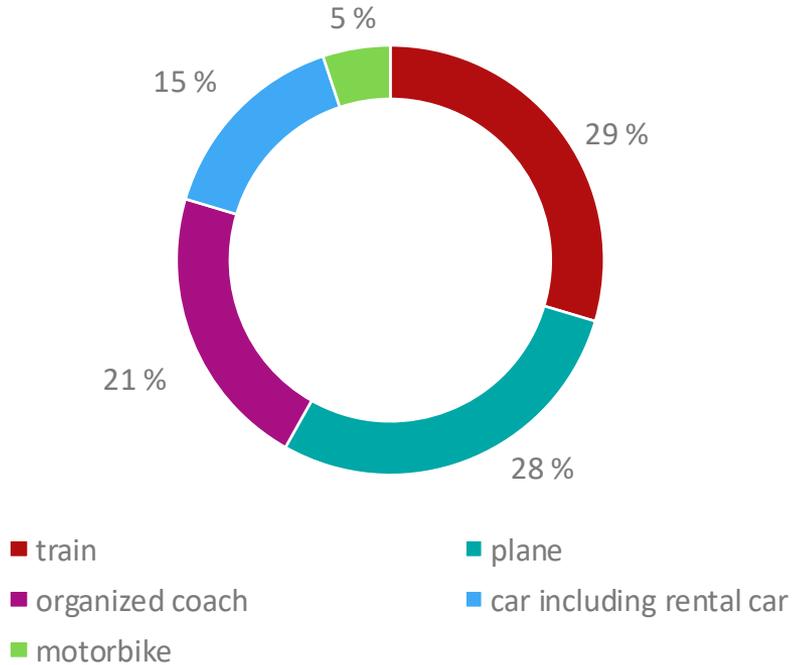


development 2019/20 versus 2021/22

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

Means of transport

Arrival of international holidaymakers

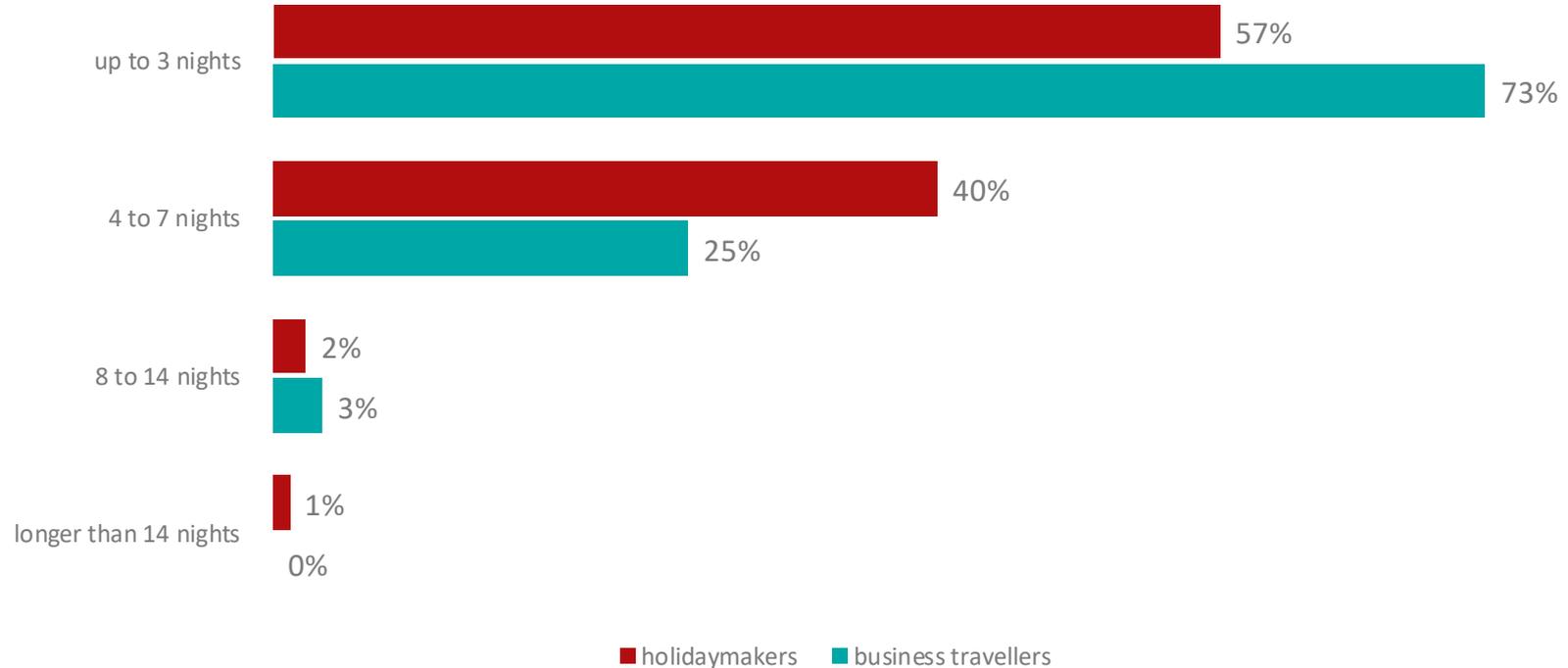


development 2019/20 versus 2021/22

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

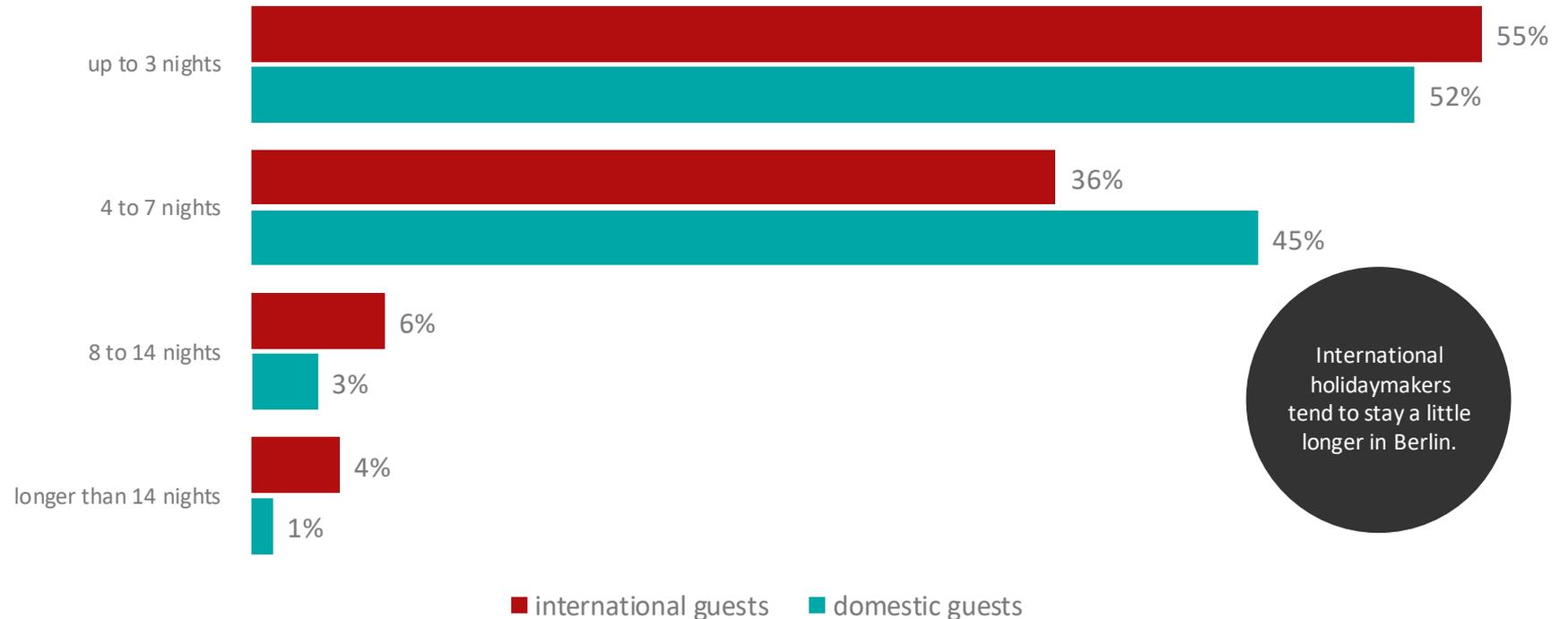
Length of stay

Comparison of the length of stay of holidaymakers and business travellers



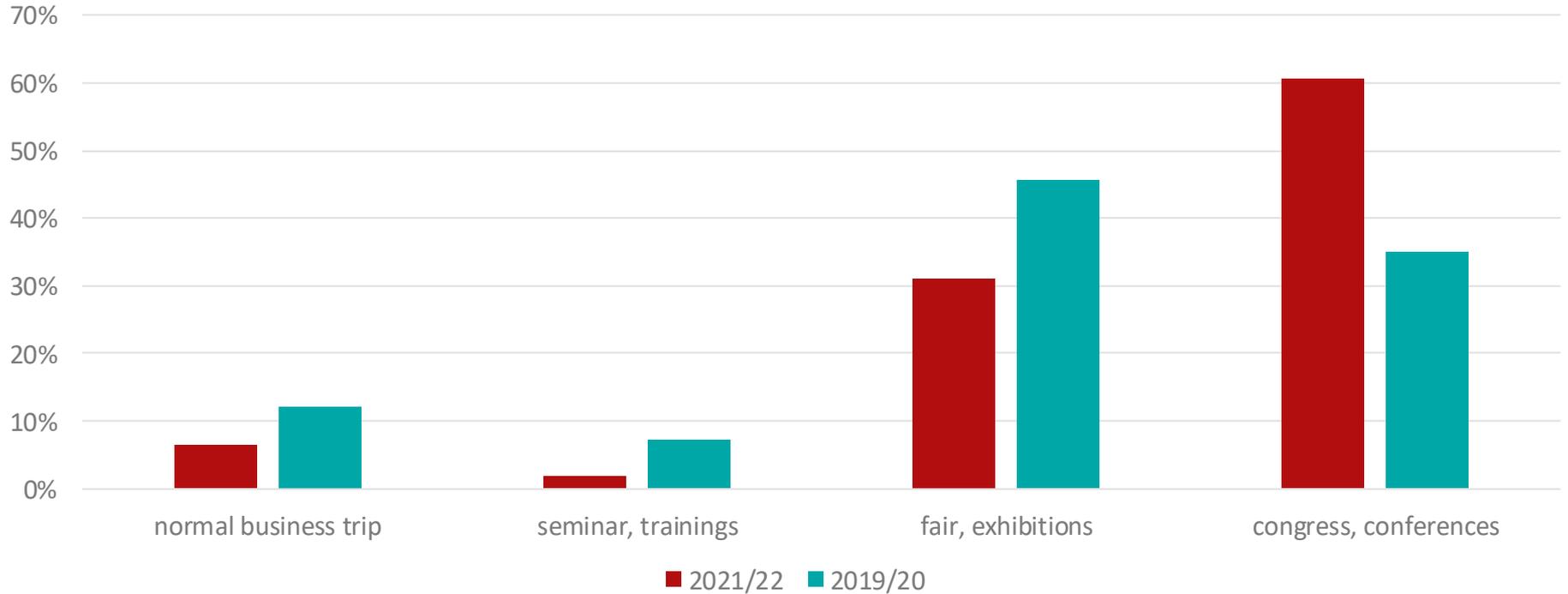
Length of stay

Comparison of length of stay of domestic and international holidaymakers



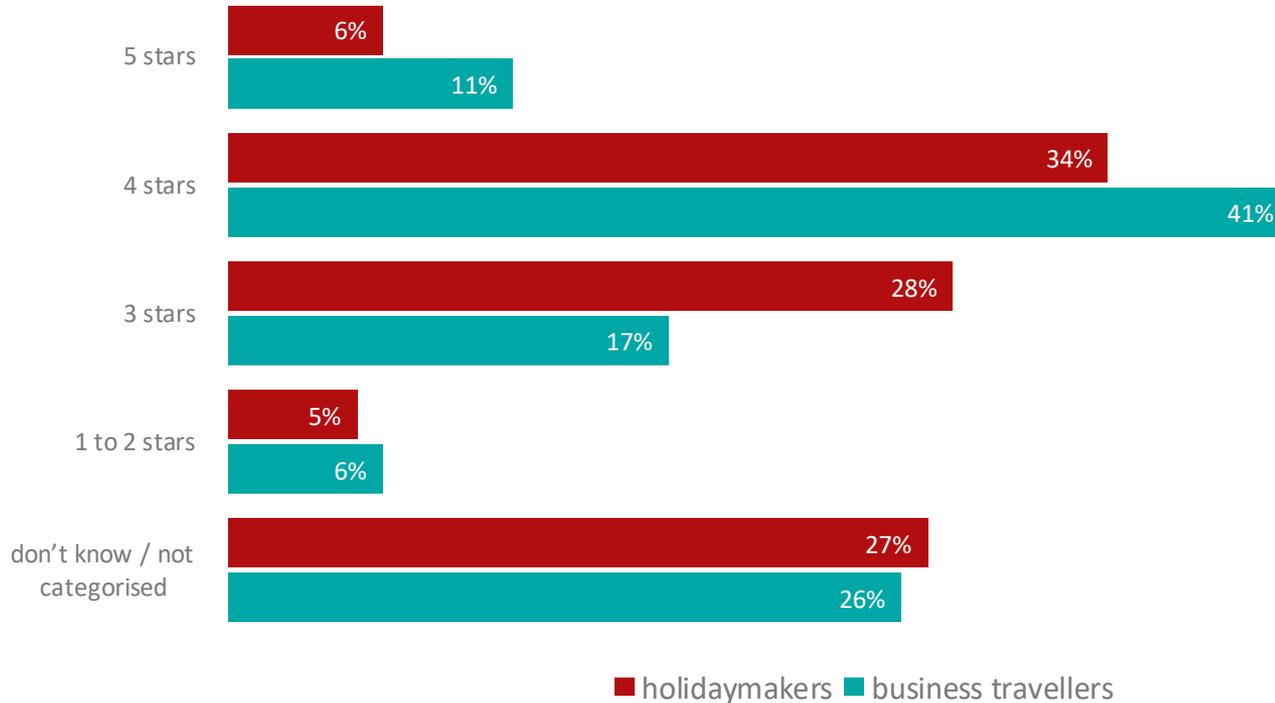
Type of business trip

(multiple answers possible)



Accommodation category

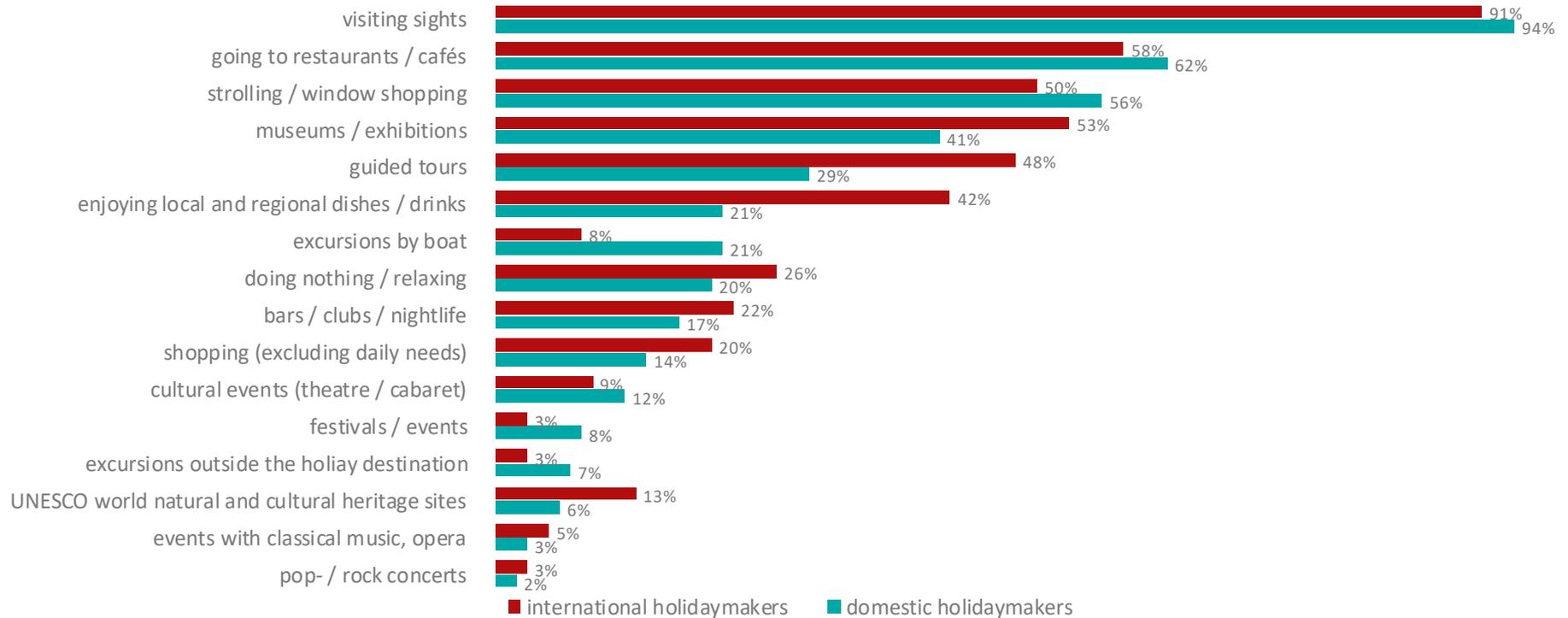
Star category of accommodation for holidaymakers and business travellers



4 and 3-star hotels are by far the most popular accommodation category.

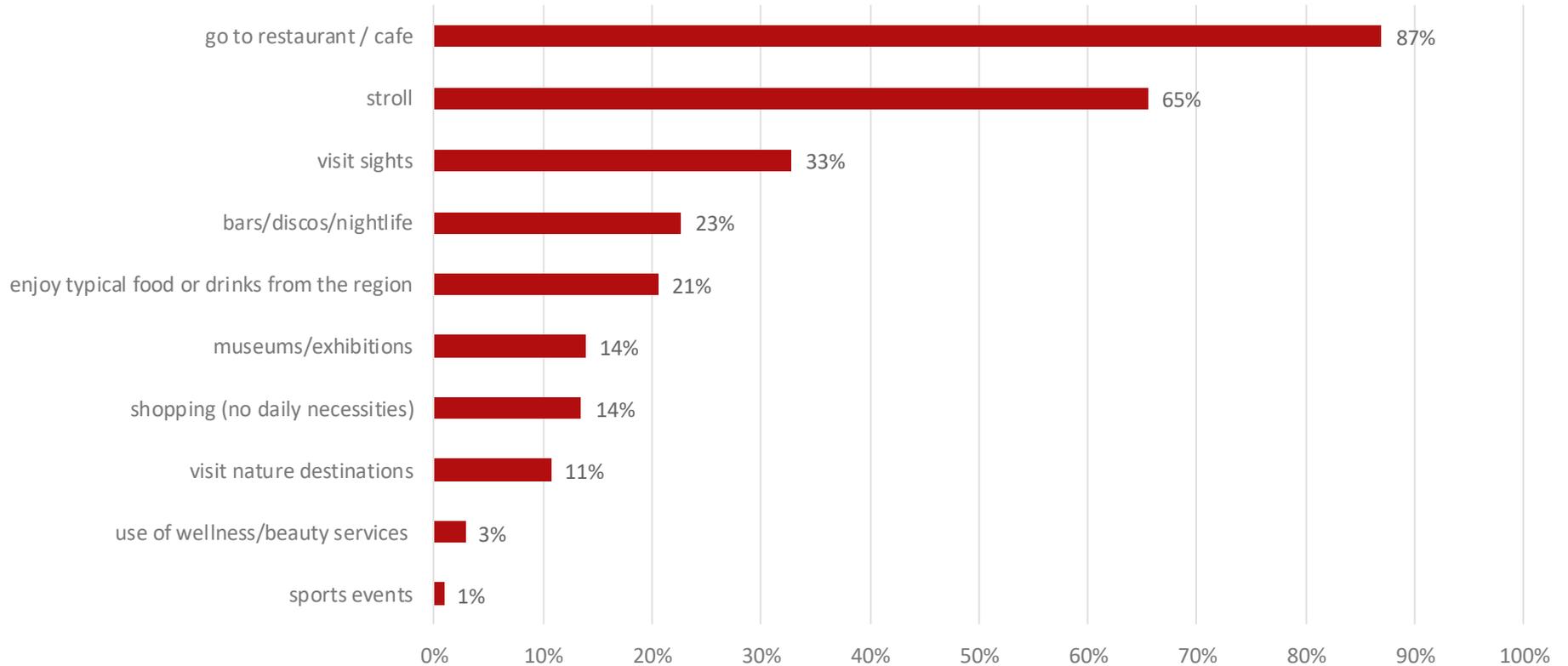
Activities

Activities of domestic and foreign vacationers in comparison



Activities

TOP 10 activities of business travelers



Holidaymaker spendings

However, in dwif's experience, the resulting level of spending per capita per day represents minimum values.

	2011/12	2013/14	2015/16	2017/18	2019/20	2021/22
accommodation	43 €	43 €	41 €	47 €	49 €	46 €
food and drinks	28 €	21 €	26 €	27 €	27 €	27 €
food products	3 €	5 €	5 €	5 €	3 €	6 €
purchase of other goods	20 €	15 €	19 €	15 €	10 €	15 €
leisure, entertainment, sports and culture	11 €	12 €	9 €	11 €	12 €	10 €
local transport	8 €	8 €	5 €	-	6 €	5 €
Other services	1 €	3 €	1 €	3 €	-	2 €
total	113 €	107 €	106 €	115 €	108 €	111 €



Intention to visit again and to recommend to others

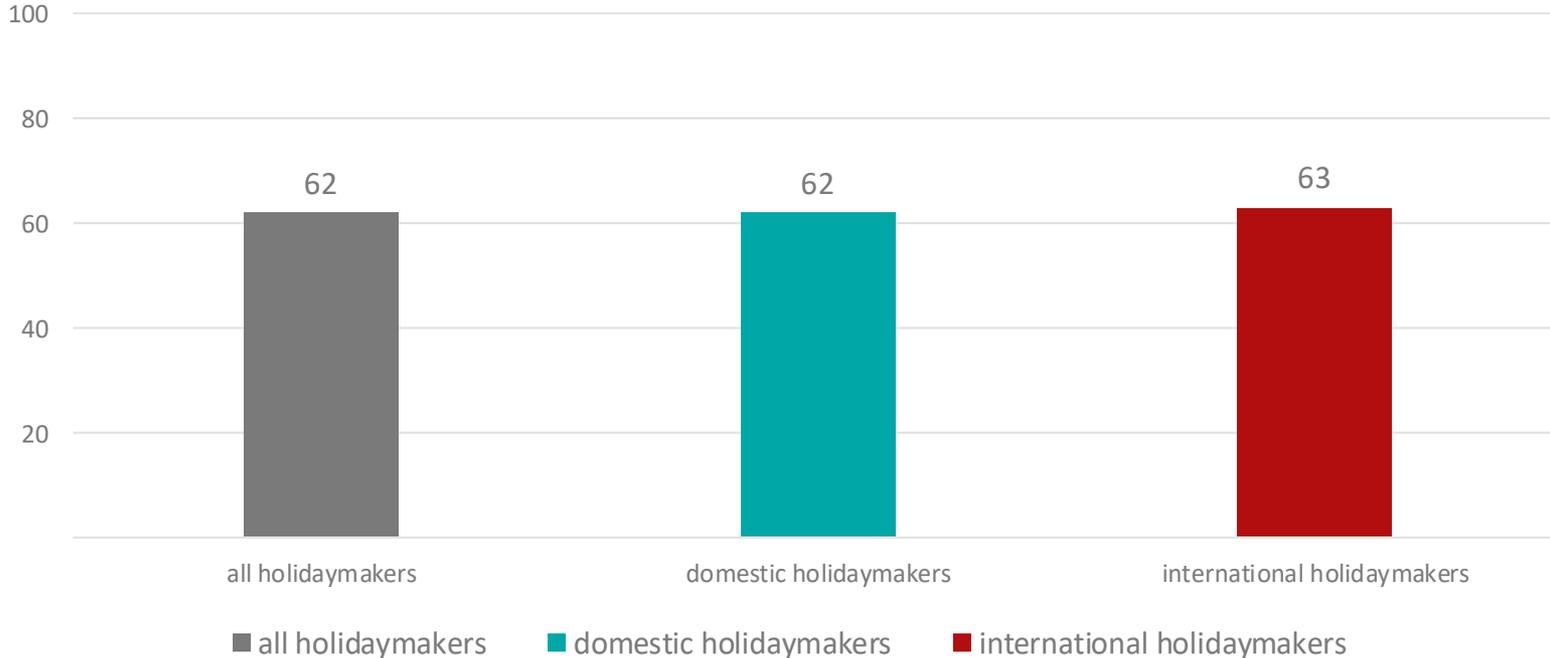
With how much certainty will visitors come to Berlin again in the future?

With how much certainty will visitors recommend a stay in the capital?

Intention to revisit

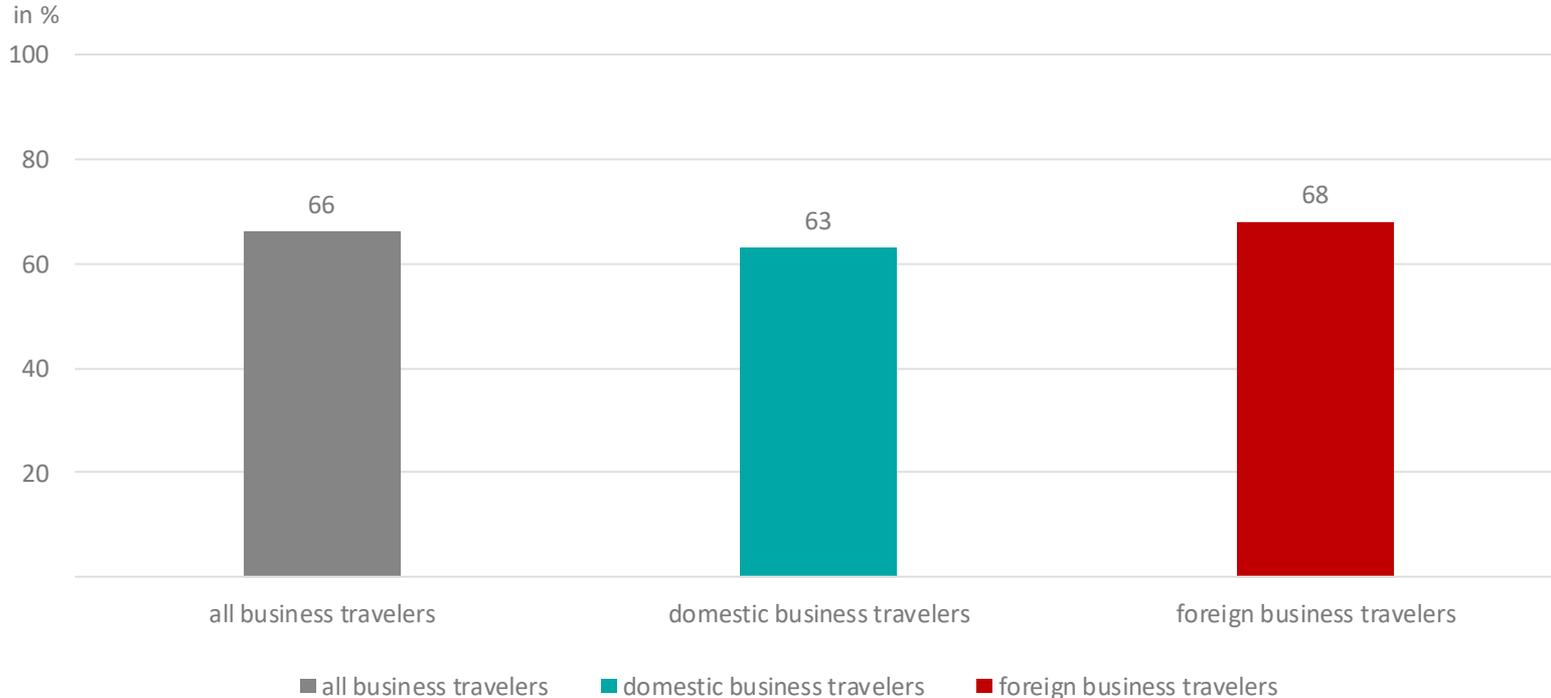
Percentage of holidaymakers who, according to their own information, are “very certain” or “certain” that they will travel back to Berlin in the next 2-3 years

in %



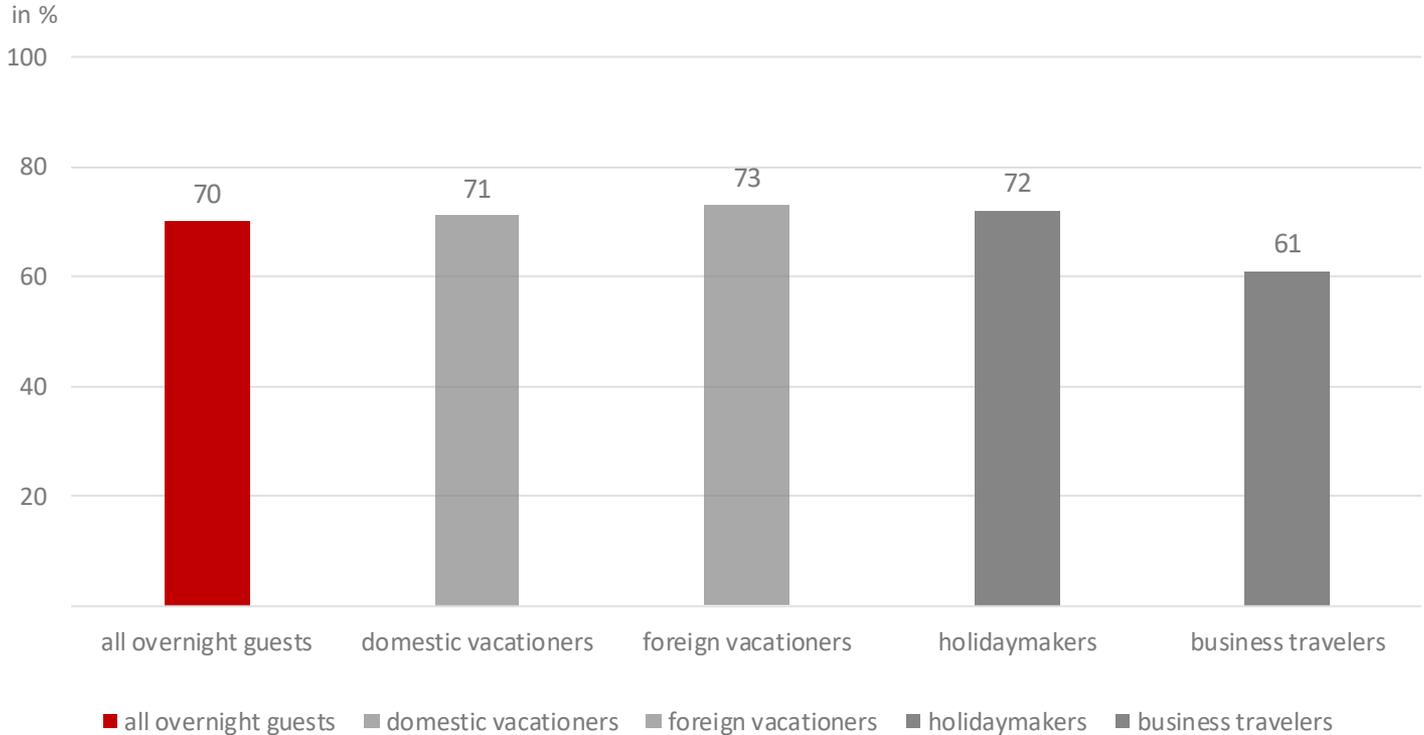
Intention to revisit (business travelers)

Proportion of business travelers who say they will "very definitely" or "definitely" travel to Berlin again in the next 2-3 years



Recommendation intention

Percentage of Berlin guests who are extremely confident about recommending a stay in Berlin to others



70 percent of guests would certainly recommend Berlin to others. Only one percent would not recommend Berlin at all.

Methodical notes

Internal explanation

› **Survey years**

The Quality Monitor surveys are conducted in "survey years." A survey year always runs from May to April of the following year.

› **Available data**

To date, Berlin has participated in survey years 2007/08; 2008/09; 2009/10; 2011/12; 2013/14; 2015/16, 2017/18, 2019/20, 2021/22. Data authorizations are available for these years.

› **Changes to the questionnaire and survey method in 2011**

In 2011, for example, new answer categories were introduced (e.g., the information source "social media"). In addition, according to dwif, since 2011 questions have been asked using the "supervised self-completion" method. In order to further minimize interviewer influence, among other things, the questions and items are no longer read out individually in this method. This change in method has resulted in a decline in the level of questions with multiple responses. I.e.: For example, guests used to tick 15 activities - after the changeover they ticked 11 (fictitious example). This explains why overall low percentages occur for reasons for destination decision and activities. I.e.: Be careful when comparing data collected before and after the method change!

› **Quoting of the sample**

In order to obtain representative data, the sample is quoted. This means, for example, that the proportion of U.S. citizens surveyed is determined according to the proportion of certain nationalities among visitors to Berlin (official statistics). In addition, in order to take into account the seasonal nature of the number of visitors, more people are surveyed in the summer months than in the winter. Statements on the type of accommodation (hotel, guesthouse, vacation home, etc.) should better not be derived from the Quality Monitor, as it does not take into account the gray lodging market (incl. sharing platforms).



© iStock.com, Foto: Chiralaba

Evaluation for Berlin 2021/22