

VISIT BERLIN 

Quality Monitor

Tourism in Germany

Evaluation for Berlin 2023 / 2024

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Extracts from the database

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About the Quality Monitor for Tourism in Germany

Backgroundinformation

The Quality Monitor Germany Tourism is an initiative of the Europäische Reiseversicherung and the Deutsche Zentrale für Tourismus e. V. (DZT). The quality monitor (since 2007) is a long-term project and is regularly updated.

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 guest survey also provides information on the strengths and weaknesses of the offer and identifies measures to improve quality.

About the Quality Monitor for Tourism in Germany

Methodology

The basis for this is provided by interviews at the national level, which are supplemented by additional surveys in the participating partner regions. Around **9,500 interviews** were conducted **across Germany** in the 2023/24 survey period (May 2023 to April 2024), **around 1,700** of them **in Berlin**.

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 2023/24** and provides information on the travel behavior of **visitors to Berlin**.

Linguistic note:

For reasons of readability, this document does not use gender-sensitive language. All personal designations used refer to people of all genders.

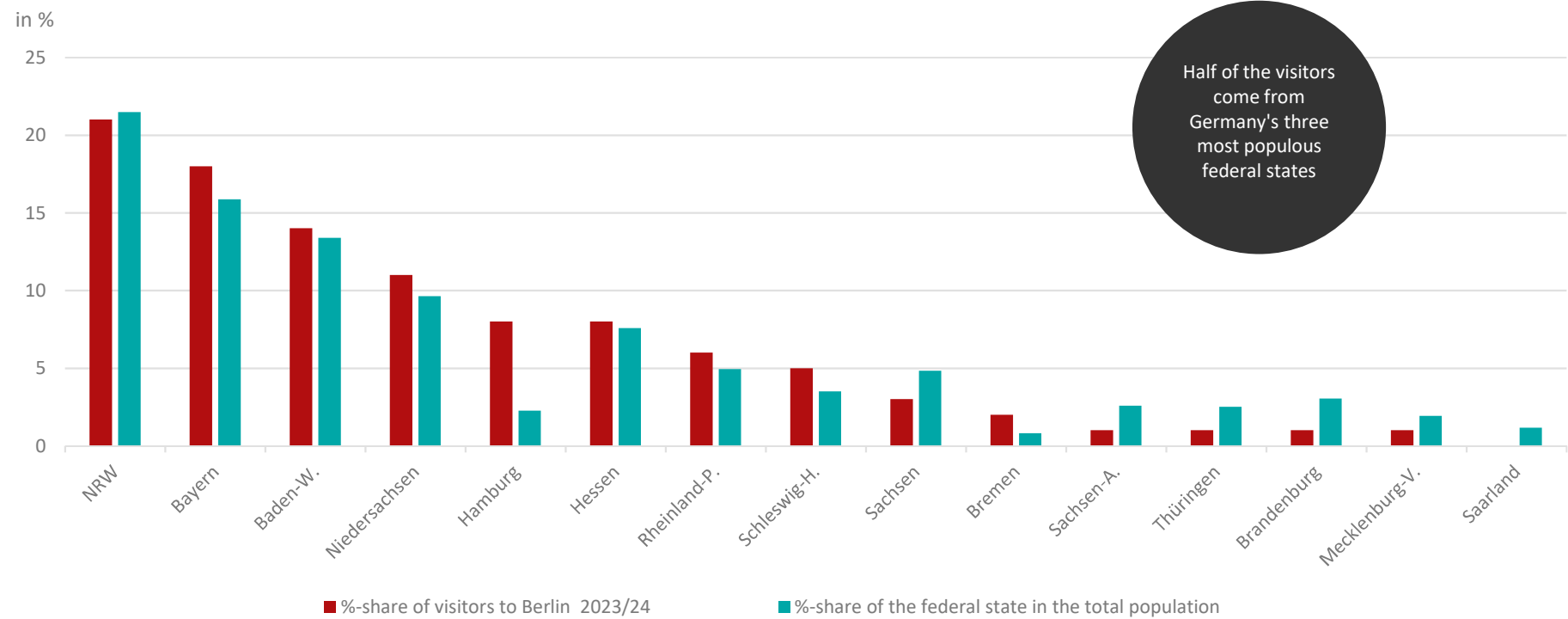


Guest structure

overnight visitors in Berlin

Origin

German federal state origin of vacationers and business travellers



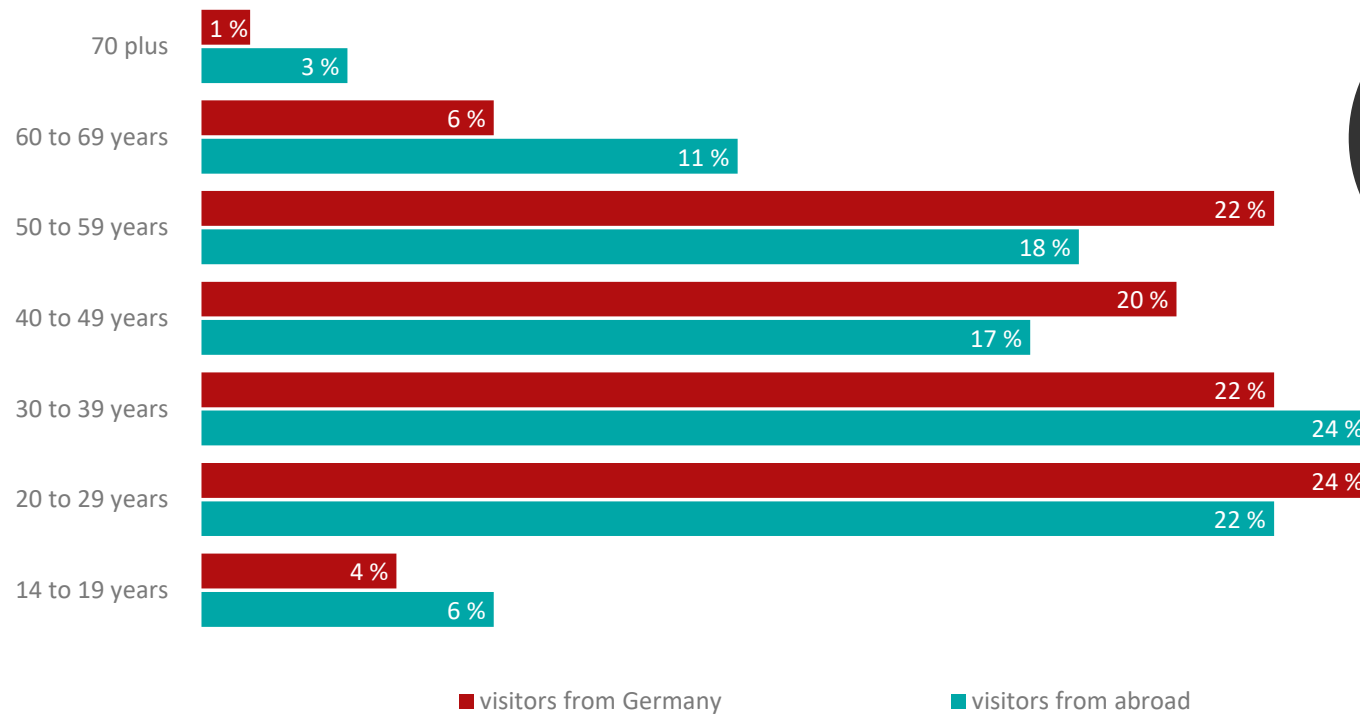
Age

Age of vacationers and business travellers



Age

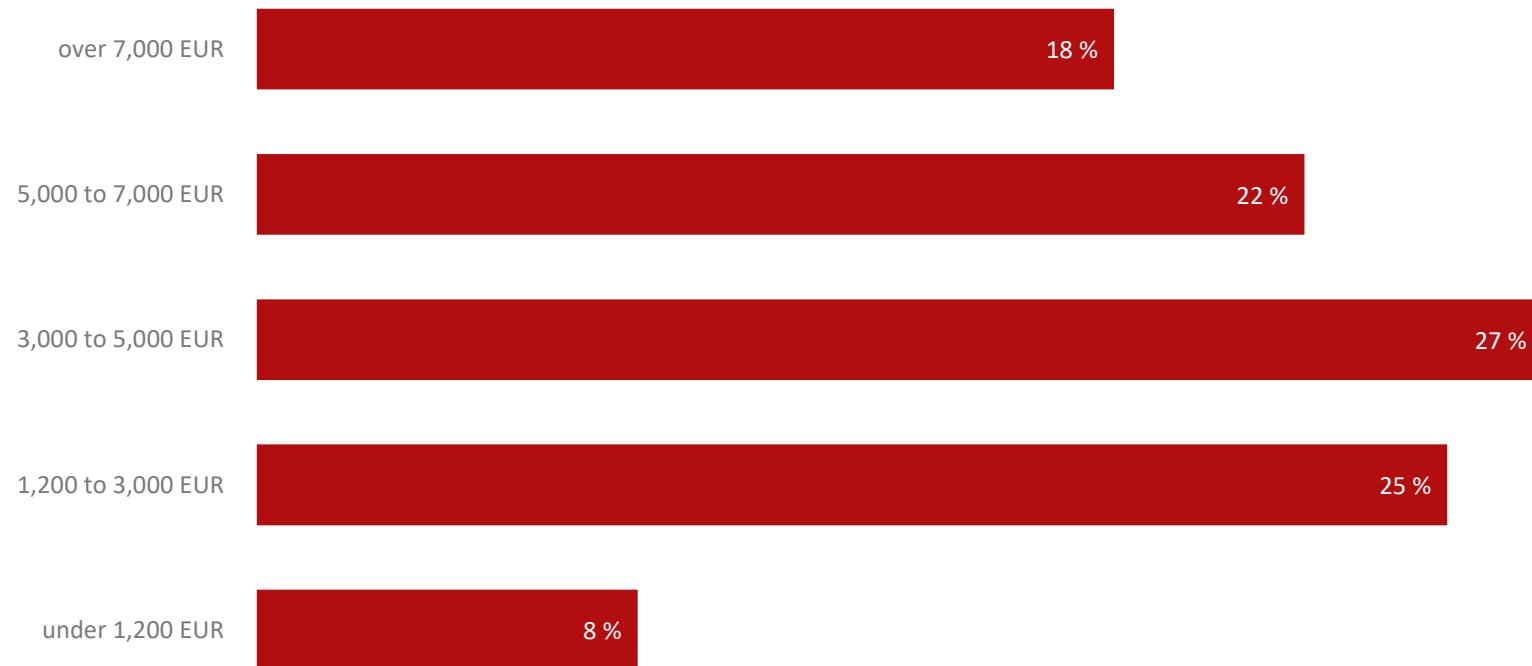
Age comparison of domestic and international visitors to Berlin



Ø-age of visitors from
Germany: 40.2
Abroad: 40.4
Total: 40.3

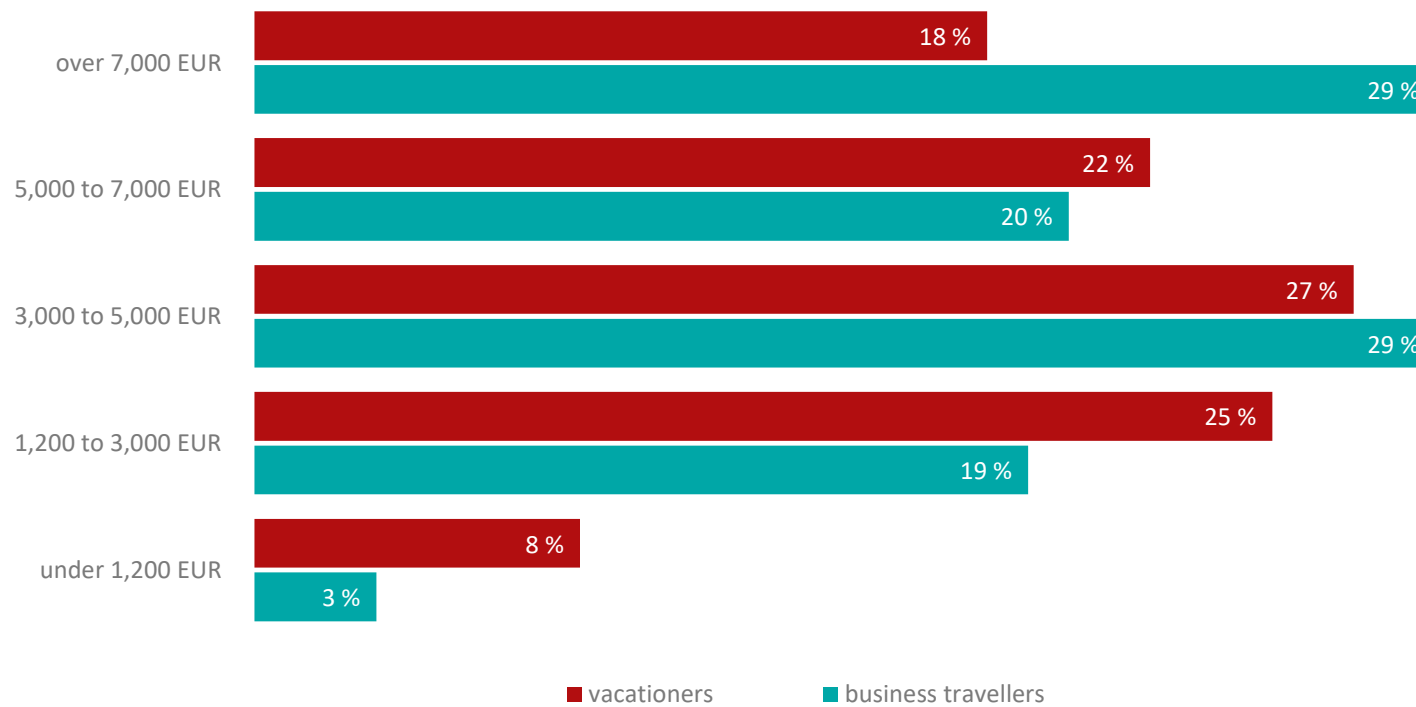
Incomes

Net monthly household income of vacationers



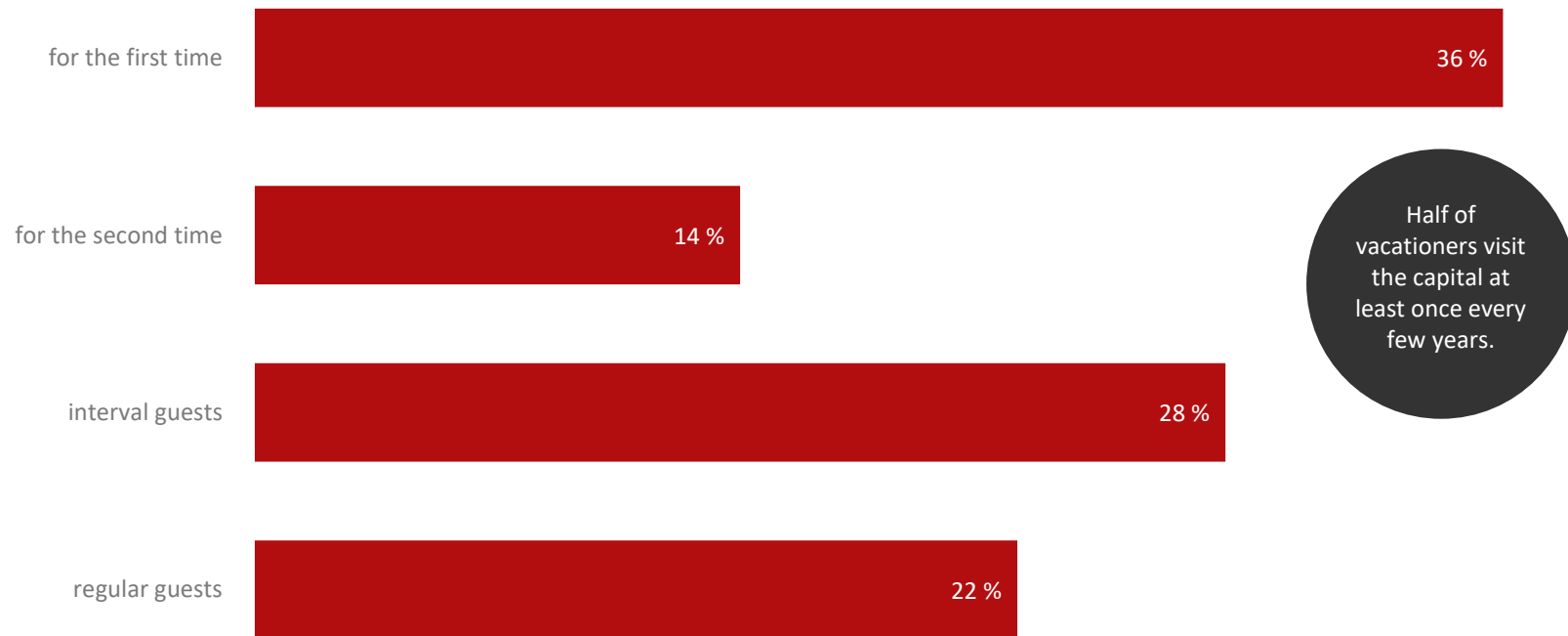
Incomes

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



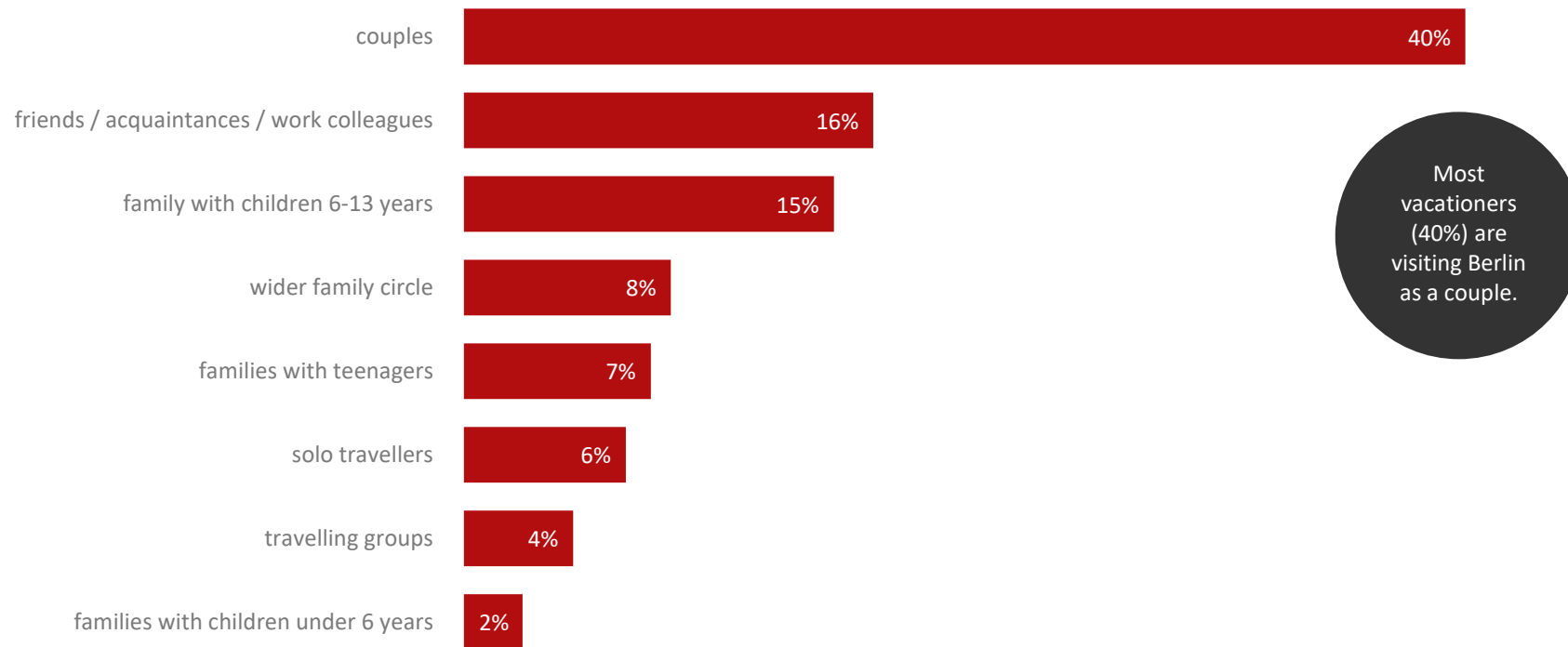
Visit frequency

Previous stays of vacationers in Berlin



Travel companions

Travel companions for Berlin vacationers (grouped)



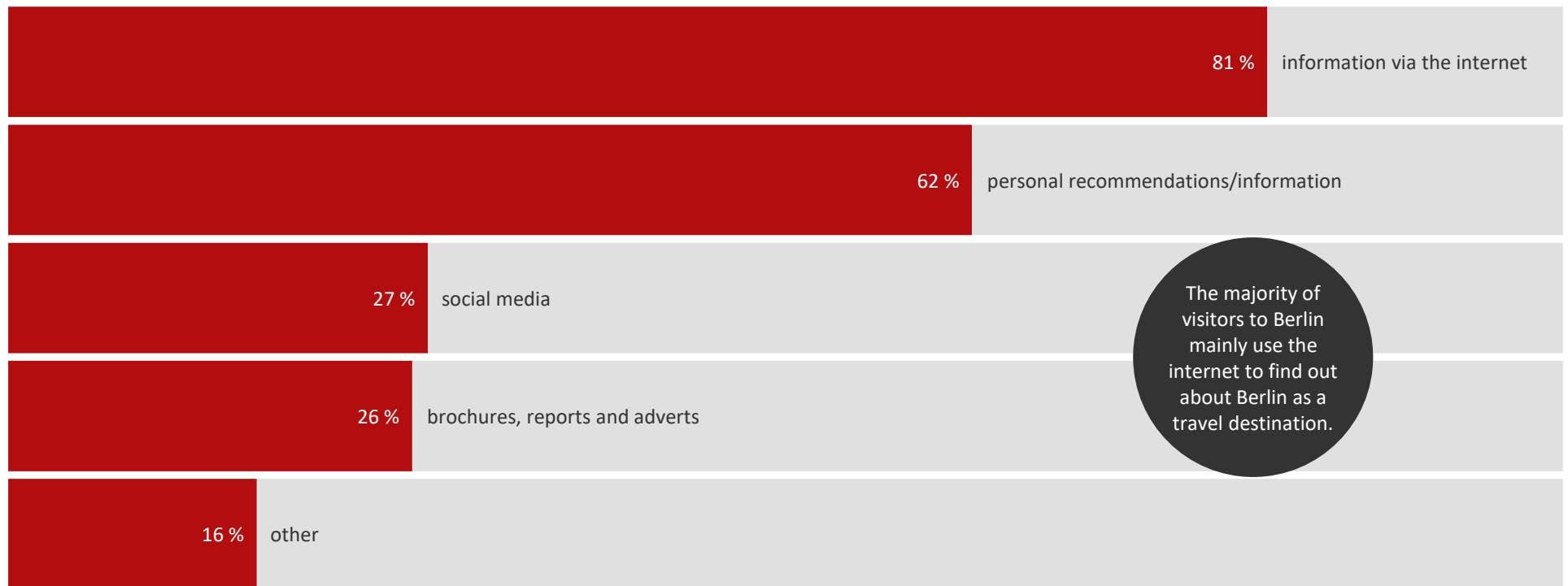


Information | Booking | Decision

When and where do guests get information?

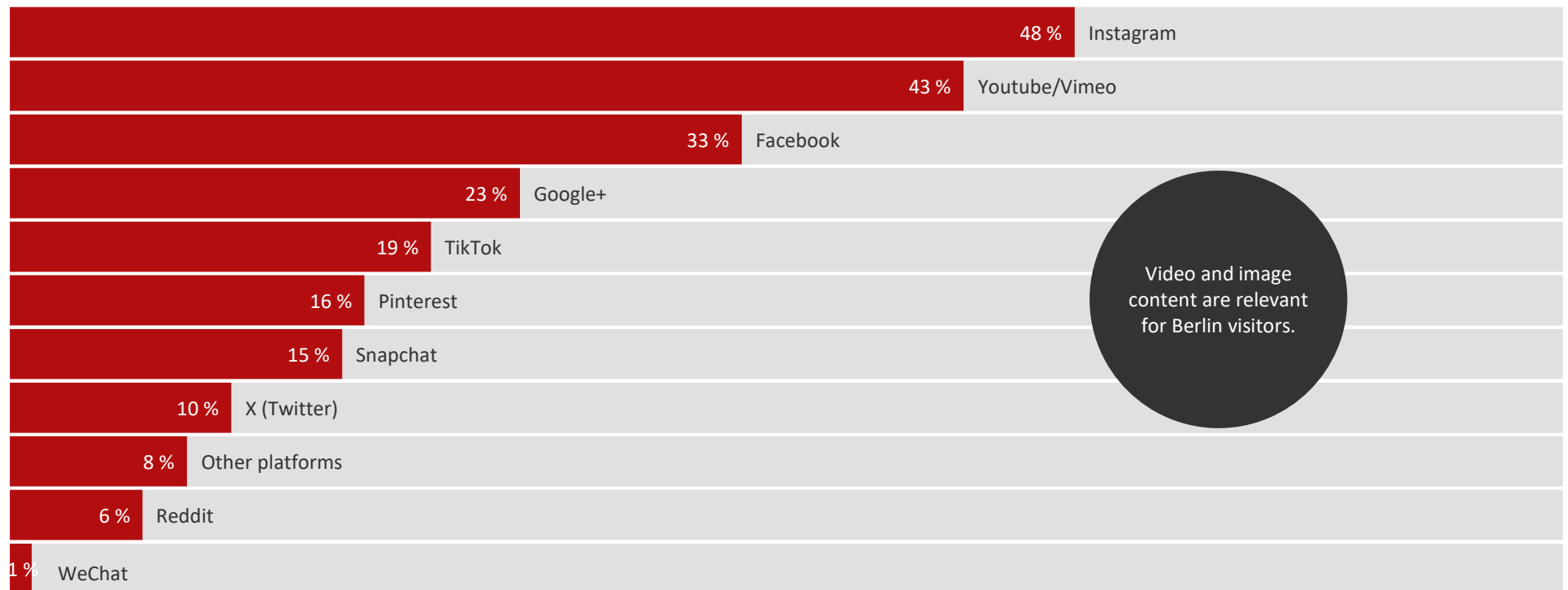
Sources of information

Overview of information sources for vacationers (or their travel companions)



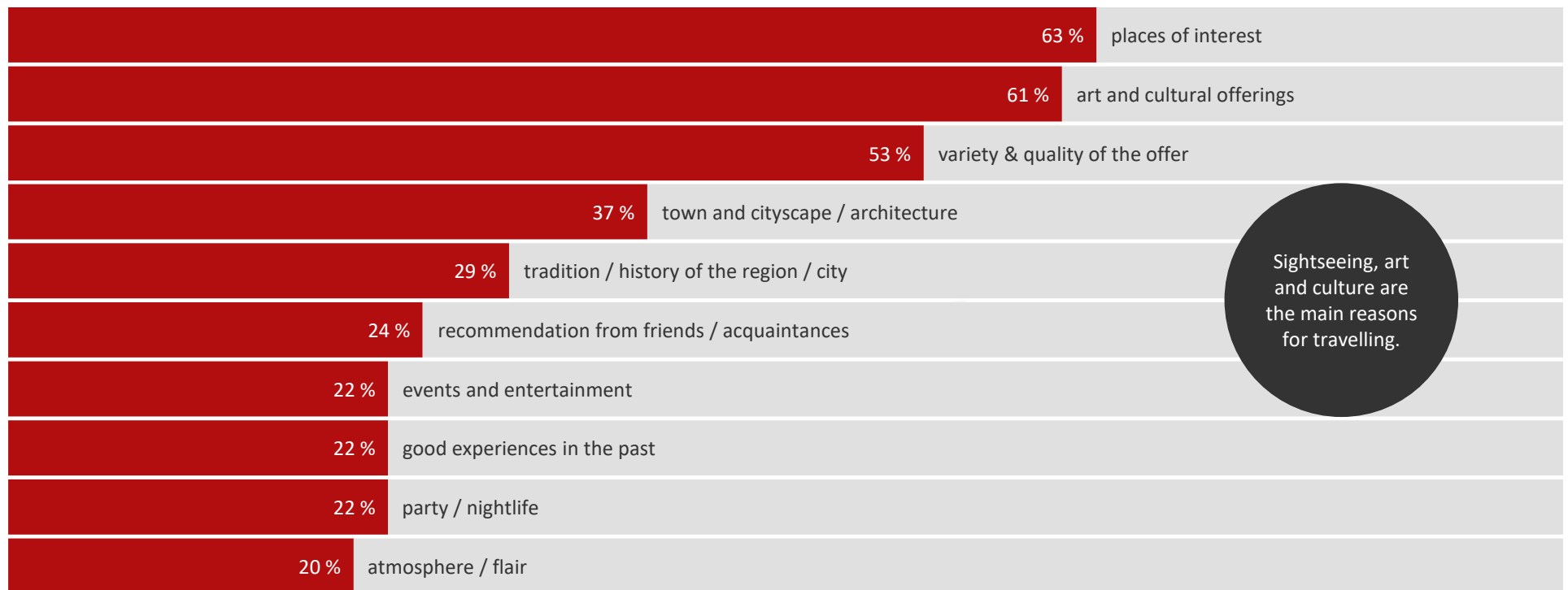
Sources of information - platforms

Platforms used by vacationers



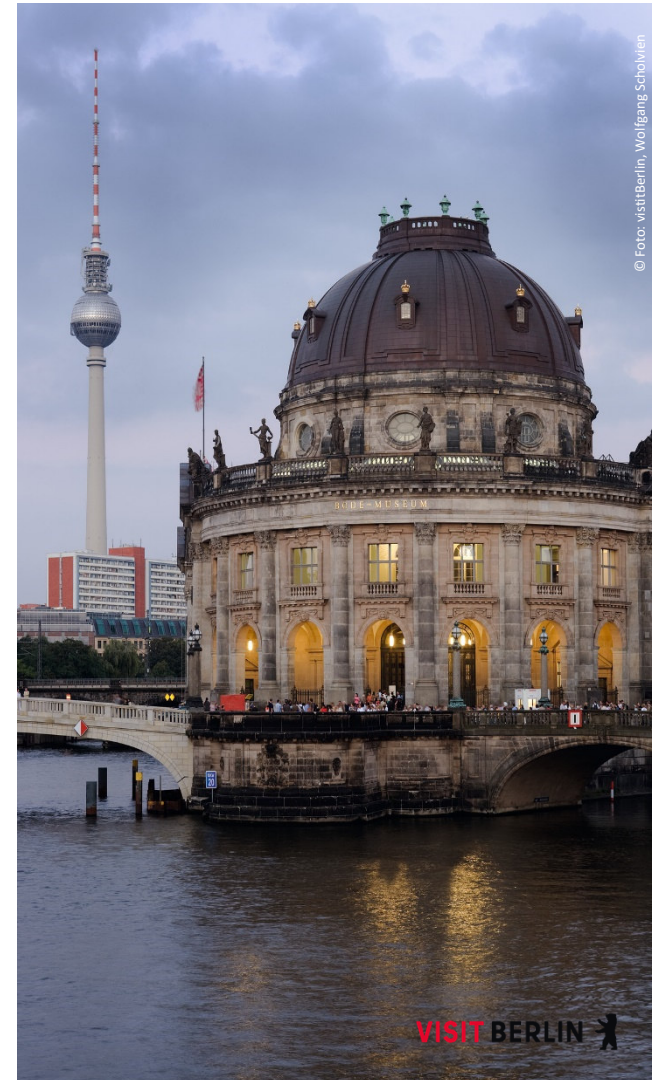
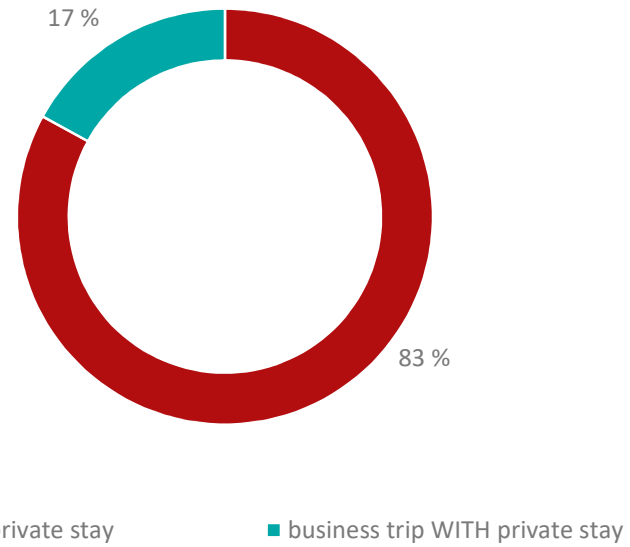
Destination decision

TOP 10 reasons to visit for vacationers



Travel motive

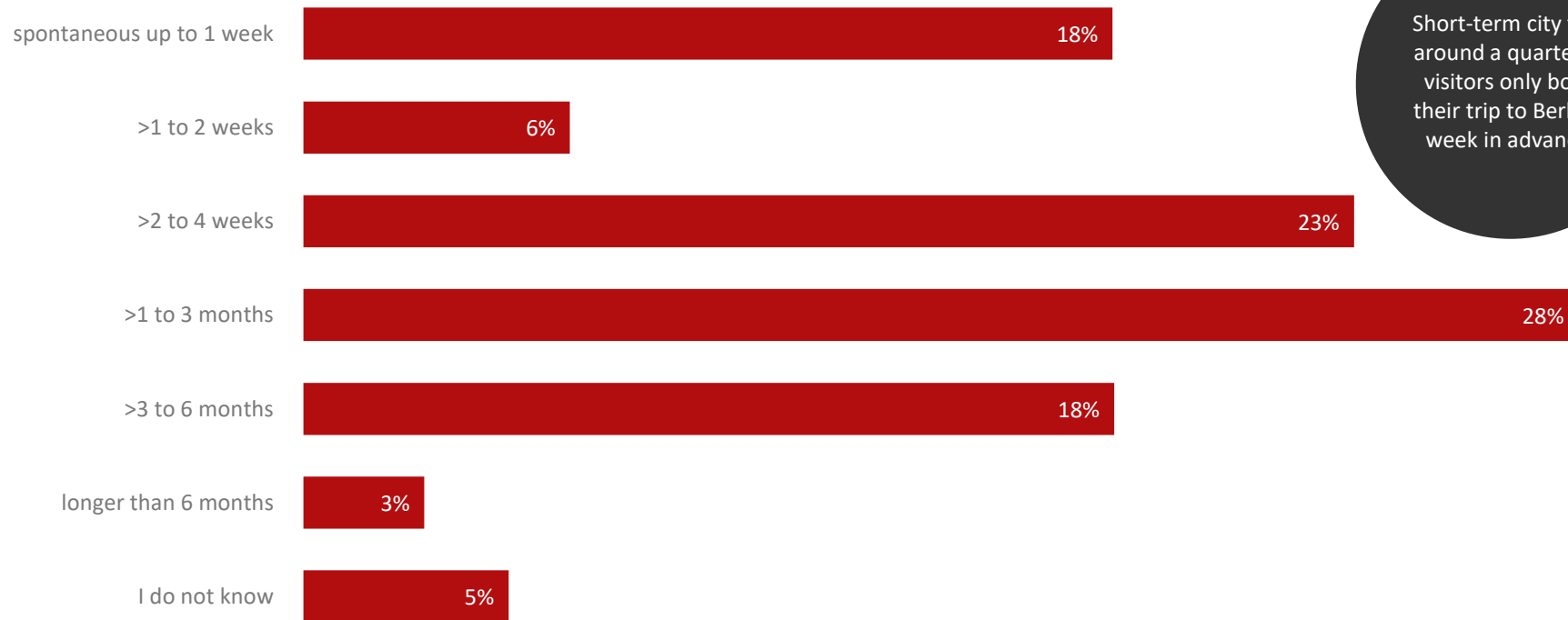
main travel motive of business travelers



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Booking time

lead time for travel booking (vacationers)



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



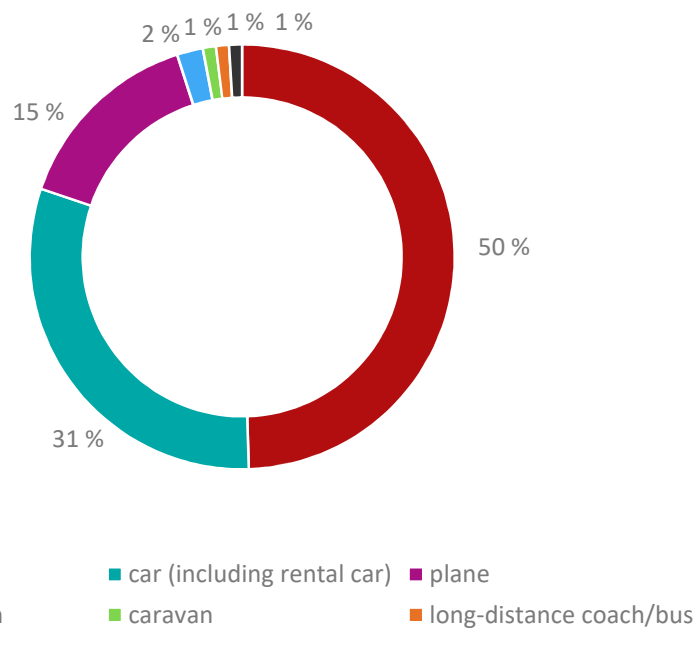
Stay – arrival method, duration, type of accommodation, activities

How do visitors arrive, how long and where do they stay?

What do visitors to Berlin do in the capital?

Means of transport

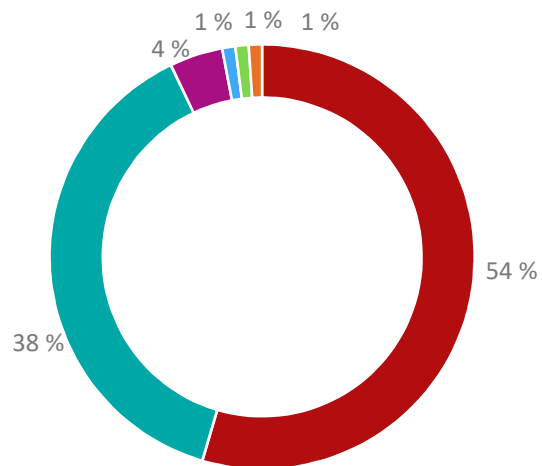
arrival of vacationers



Development 2021/22 vs. 2023/24			
Means of transport	2021/22	2023/24	Difference (percentage points)
train	46 %	50 %	↑ +6
car (including rental car)	35 %	31 %	↓ -4
plane	10 %	15 %	↑ +5
bus	7 %	3 %	↓ -4

Means of transport

arrival of German vacationers

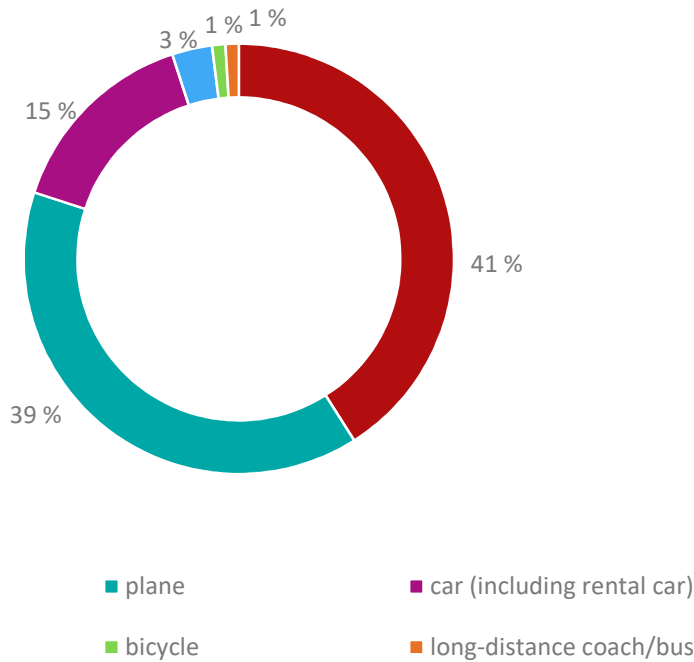


- train
- car (including rental car)
- plane
- organised coach
- long-distance coach/bus
- bicycle

Development 2021/22 vs. 2023/24			
Means of transport	2021/22	2023/24	Development
train	51 %	54 %	↑ +3
car (including rental car)	42 %	38 %	↓ -4
plane	5 %	4 %	↓ -1
bus	3 %	2 %	↓ -1

Means of transport

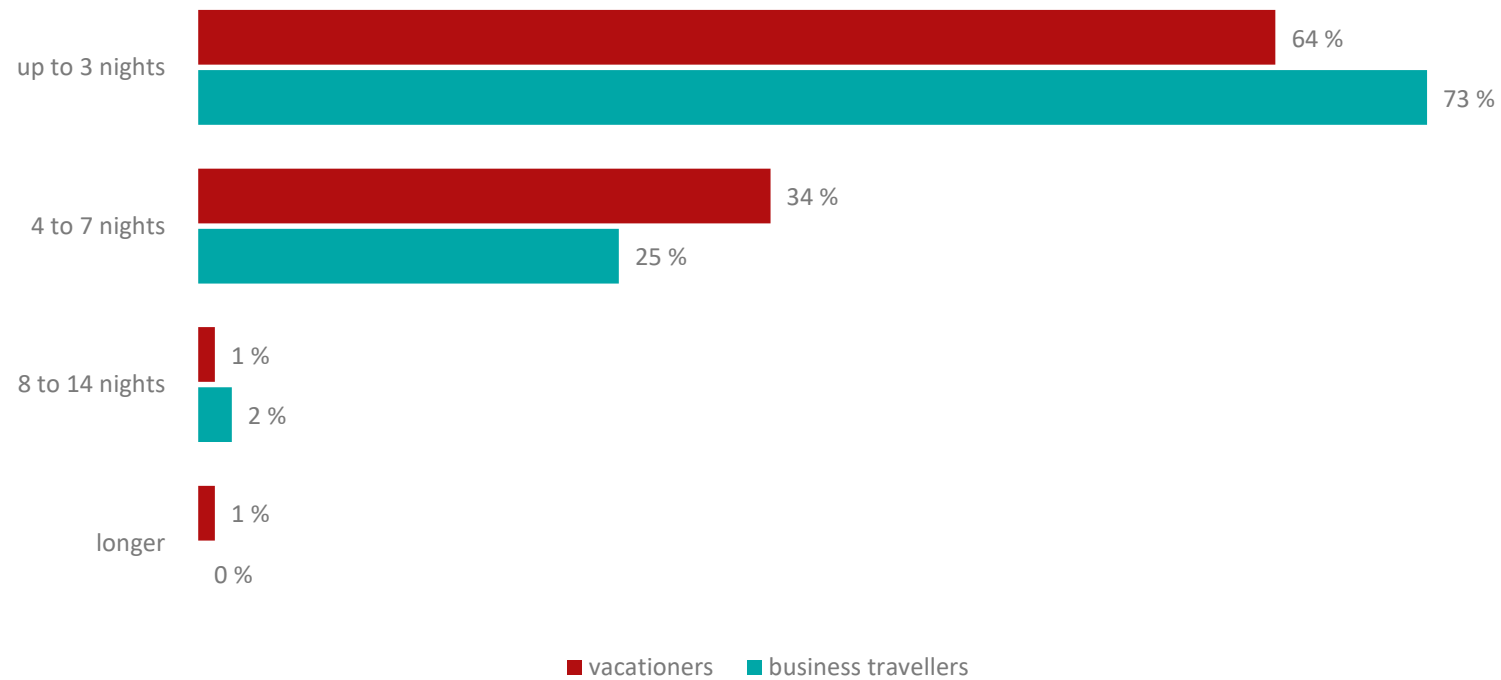
arrival of foreign vacationers



Development 2021/22 vs. 2023/24			
Means of transport	2021/22	2023/24	Development
train	29 %	41 %	↑ +11
plane	28 %	39 %	↑ +9
bus	23 %	4 %	↓ -19
car (including rental car)	15 %	15 %	● +/-0

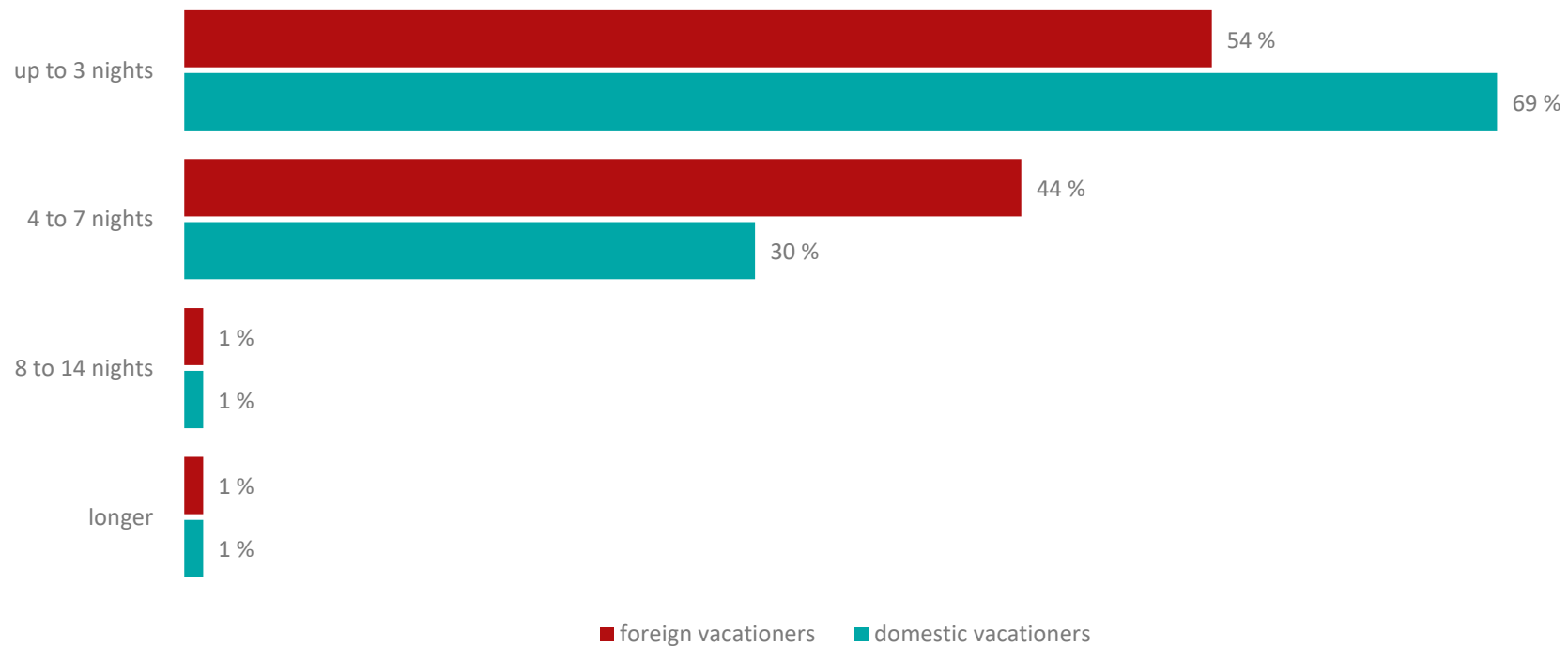
Length of stay

Whereabouts of vacationers and business travellers in comparison



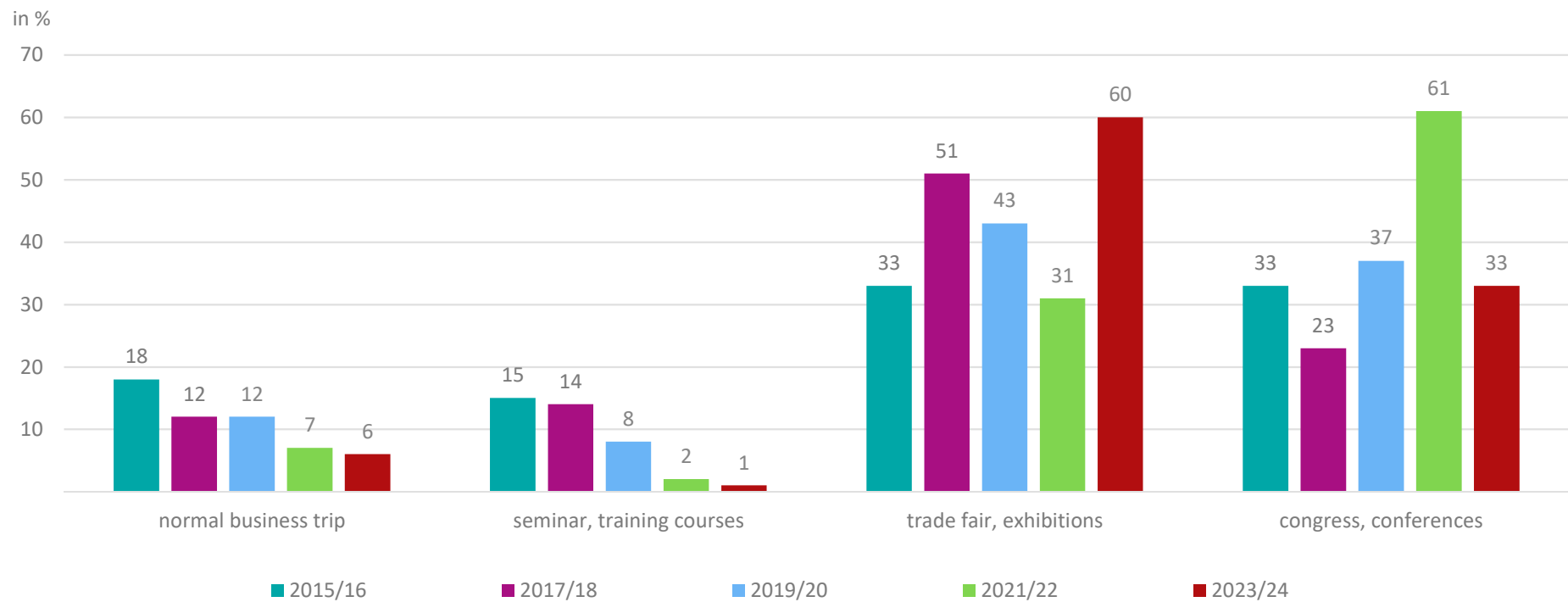
Length of stay

Comparison of length of stay of domestic and foreign vacationers



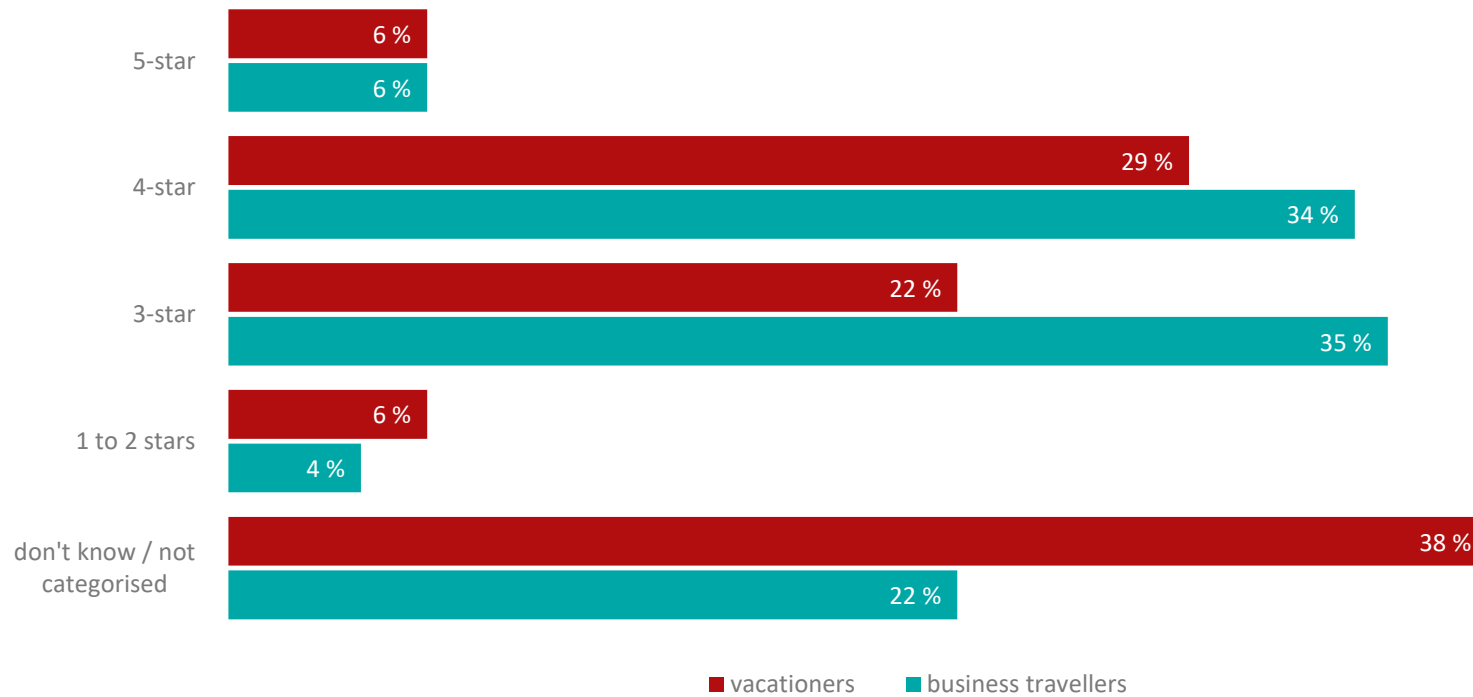
Type of business trip (time comparison)

(multiple answers possible)



Accommodation category

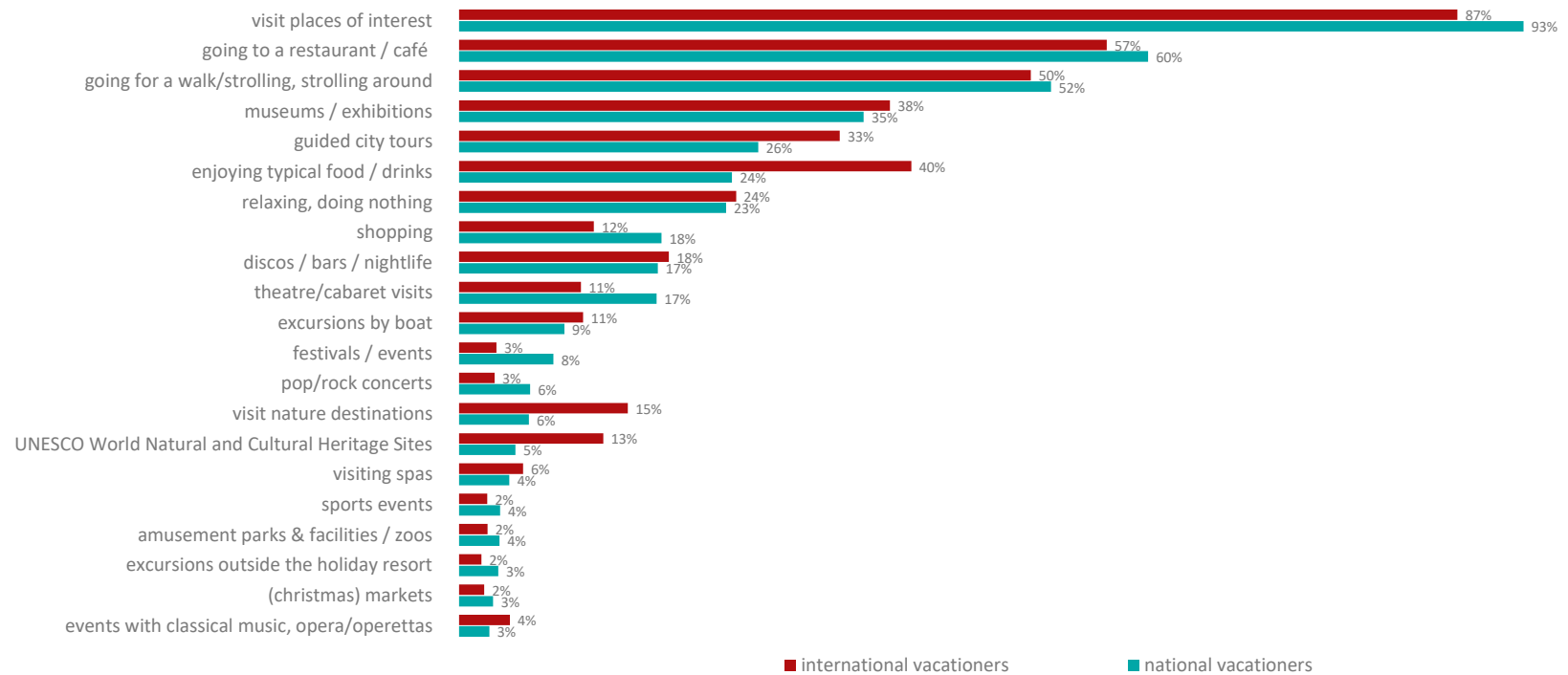
star category of accommodation for vacationers and business travellers



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

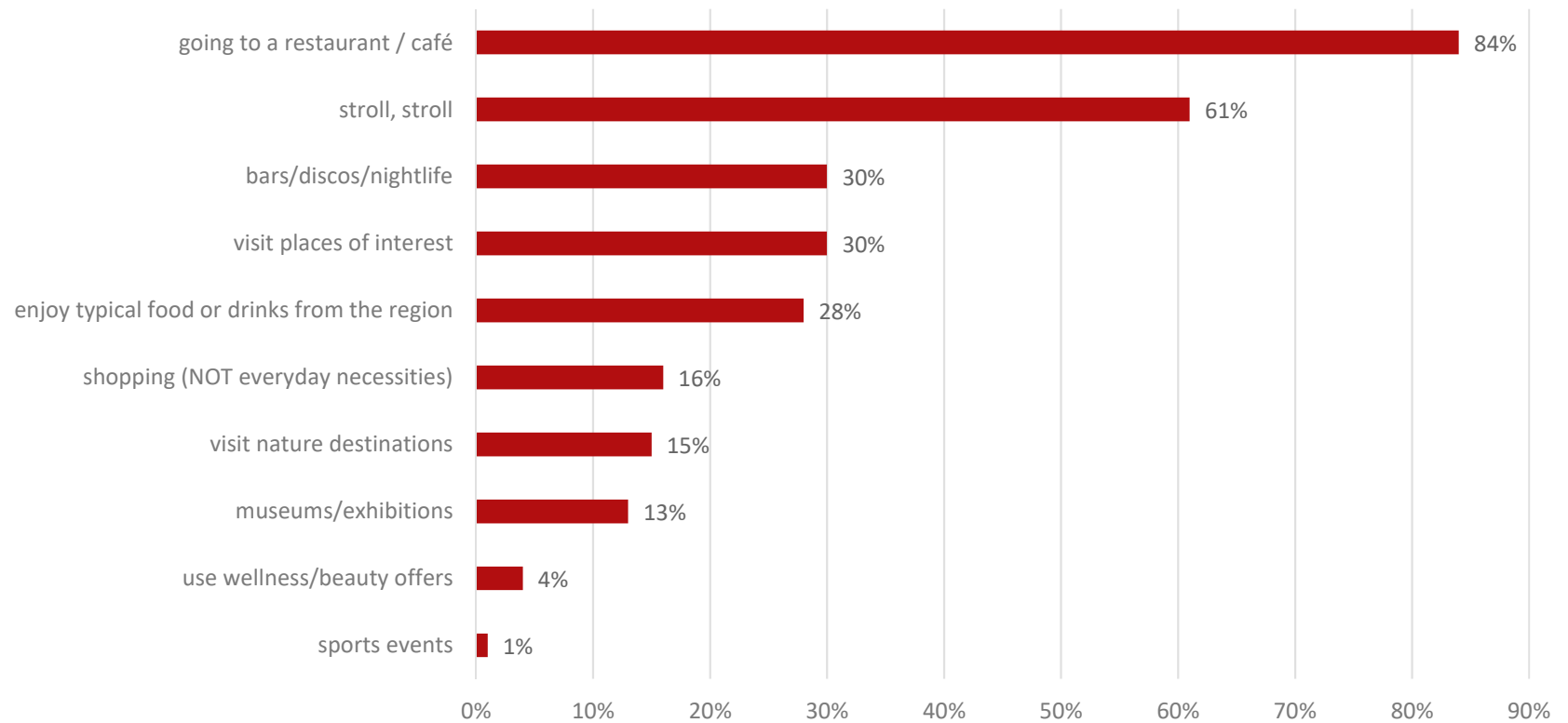
Activities

a comparison of the activities of domestic and foreign vacationers



Activities

TOP 10 activities of business travellers





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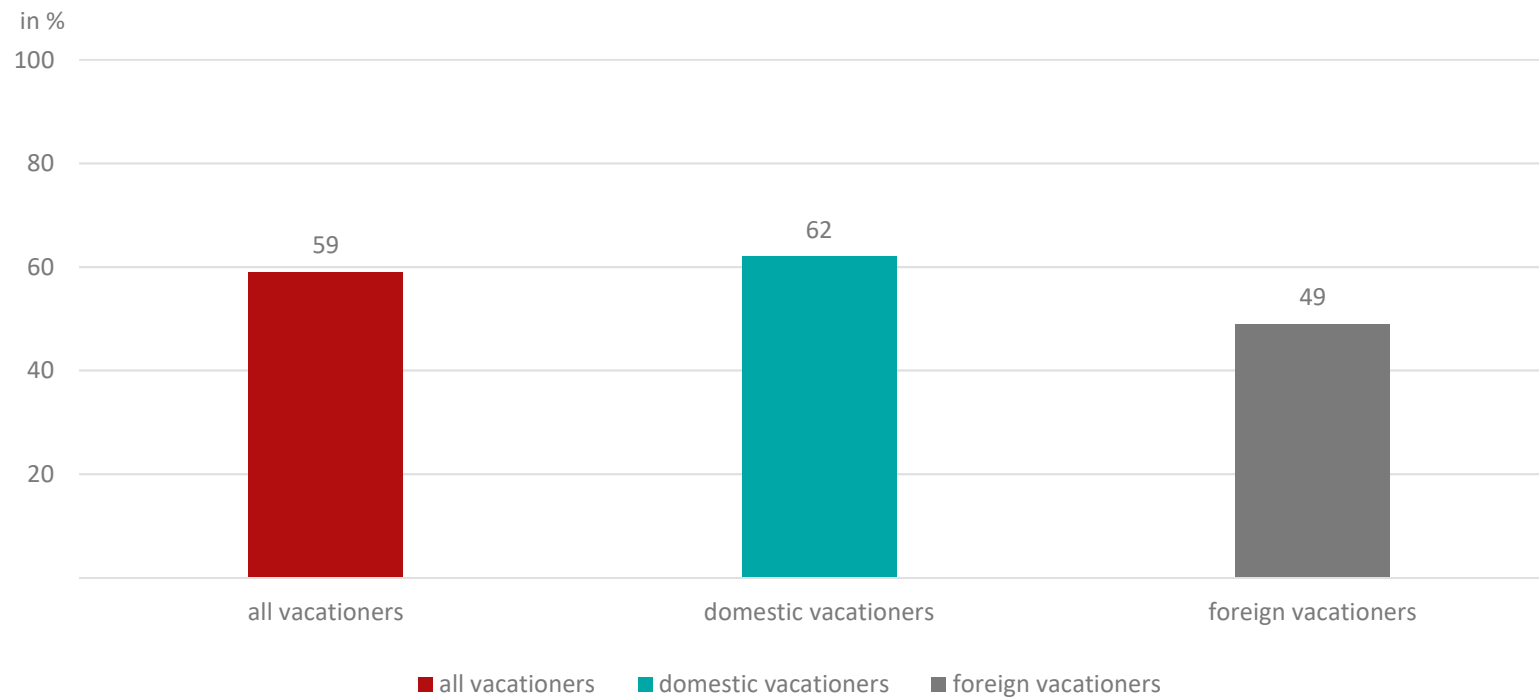
Satisfaction and intention to recommend

How likely are visitors to return to Berlin in the future?

How likely are visitors to recommend a stay in the capital?

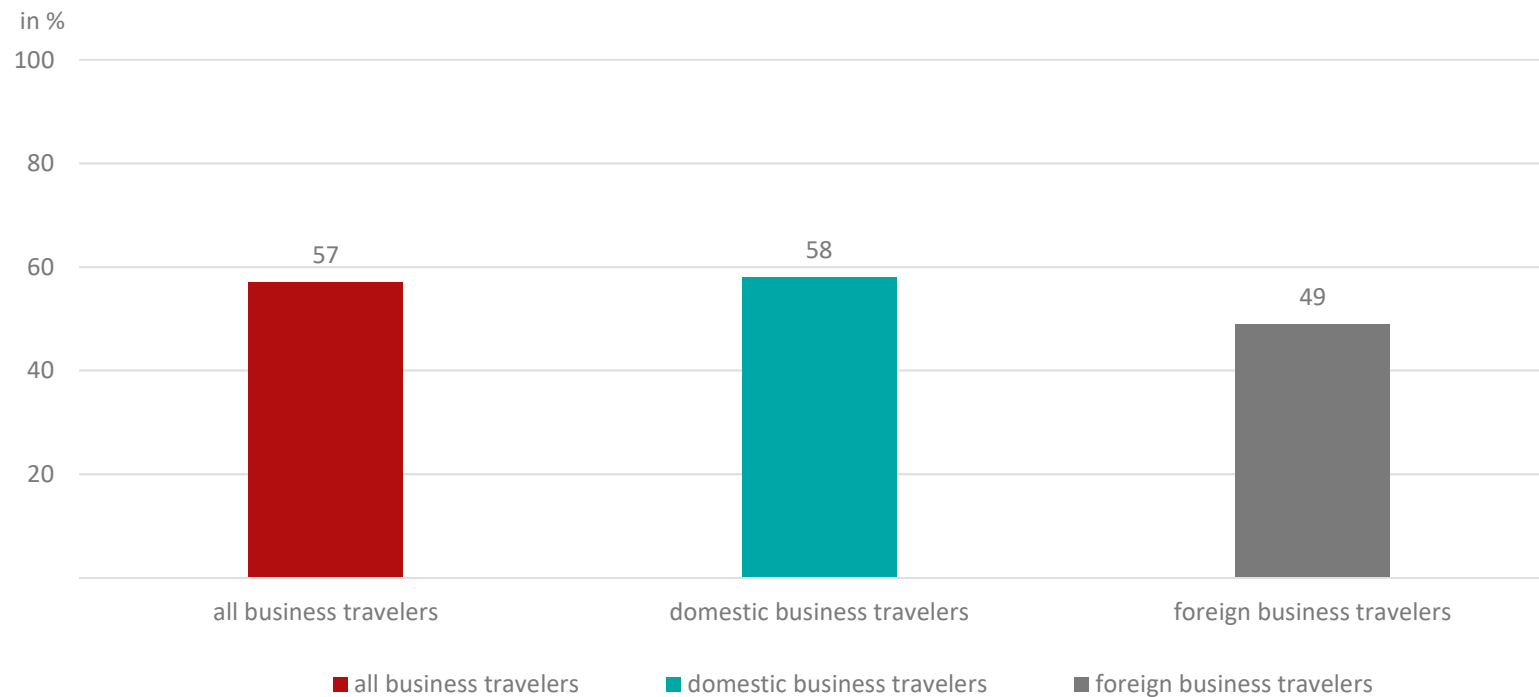
Intention to return (vacationers)

percentage of vacationers who say they are 'very certain' or 'certain' to travel to Berlin again in the next 2-3 years



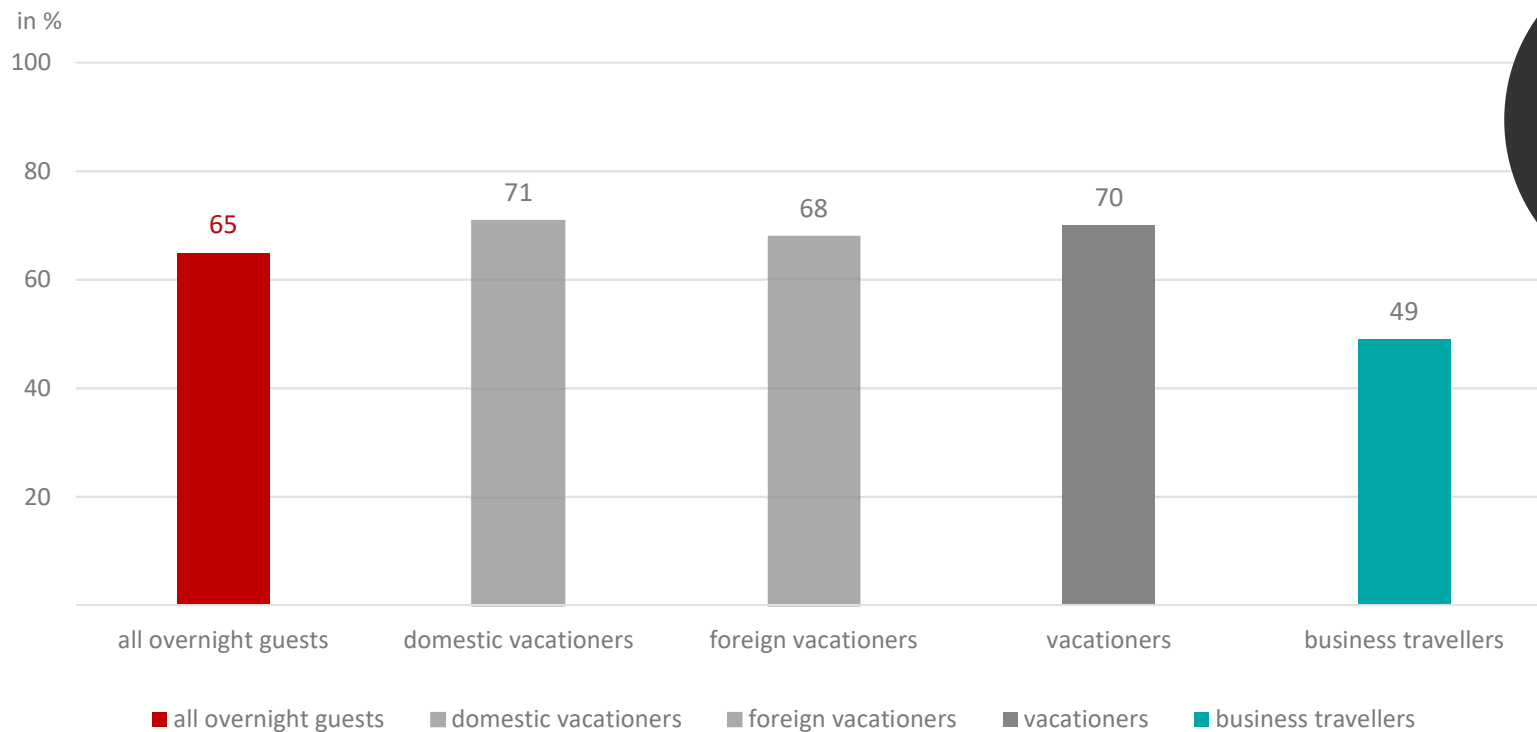
Intention to return (business travellers)

percentage of business travellers who say they are 'very certain' or 'certain' to travel to Berlin again in the next 2-3 years



Intention to recommend

Percentage of Berlin guests who are extremely sure to recommend a stay in Berlin



65 percent of guests would definitely recommend Berlin to others. Only one percent would not recommend Berlin at all.

32 Source: Quality Monitor Germany-Tourism 2023/24; n 'overnight guests 2023/24' = 1,583; n 'domestic vacationers 2023/24' = 335; n 'foreign vacationers 2023/24' = 854; n 'vacationers 2023/24' = 1,177; n 'business travellers 2023/24' = 406

Methodological notes

internal explanation

› **Survey years**

The surveys as part of the Quality Monitor are carried out in 'survey years'. A survey year always runs from May to April of the following year.

› **Available data**

To date, Berlin has participated in the survey years 2007/08; 2008/09; 2009/10; 2011/12; 2013/14; 2015/16, 2017/18, 2019/20, 2021/22, 2023/24. Data authorisations are available for these years.

› **Conversion of the questionnaire and the survey method to 2011**

New response categories were introduced in 2011 (e. g. the information source 'social media'). In addition, according to the dwif, the 'supervised self-completion' method has been used since 2011. In order to further minimise interviewer influence, among other things, the questions and items are no longer read out individually in this method. This change in method has led to a decrease in the level of questions with multiple answers. I. e.: For example, guests used to tick 15 activities - after the change, they ticked 11 (fictitious example). This explains why the overall percentage values for the reasons for the destination decision and activities are low. I. e.: Be careful when comparing data collected before and after the method change!

› **Quotation of the sample**

In order to obtain representative data, the sample is proportioned. This means, for example, that the proportion of US-Americans surveyed is determined according to the proportion of certain nationalities among visitors to Berlin (official statistics). In addition, more people are surveyed in the summer months than in winter to take into account the seasonal nature of visitor numbers. Statements on the type of accommodation (hotel, guesthouse, holiday flat, etc.) should not be derived from the Quality Monitor, as this does not take into account the grey accommodation market (including sharing platforms).


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Evaluation Berlin 2023/24

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