

# City Travel Study 2021/22: Insight knowledge for urban tourism during and after Corona

- Individual Evaluation Proposition -

Implementation as part of the LIFT funding  
programme of the German Federal Ministry for  
Economic Affairs and Climate Action



# City Travel Study 2021/2022: Insight knowledge for urban tourism during and after Corona

## OBJECTIVES OF THE STUDY

Urban tourism is facing major challenges due to the Corona pandemic. The German domestic market is gaining importance as the demand from international source markets is still uncertain and recurring at a much slower pace. At the same time, the restraint to undertake business trips is bringing leisure guest with an affinity for urban travel into focus. Because of that, it is important to investigate changing guest needs, forms of offer, behavioural patterns and thus new framework conditions and design parameters for destination management and urban tourism overall early on. In order to record the changing guest needs, behavioural and consumption patterns and new requirements for urban tourism, it is necessary to set up profound market research data and to impart it in a professionally edited manner.

This is the objective of the “City Travel Study 2021/2022: Insight knowledge for urban tourism during and after Corona”. The study is conducted by the German Tourism Association as well as by the two project partners European Tourism Institute (ETI) and St. Elmo’s Tourism Marketing. The project is being implemented as part of the LIFT funding programme of the German Federal Ministry for Economic Affairs and Climate Action.

Gefördert durch:



aufgrund eines Beschlusses  
des Deutschen Bundestages

## KEY SUBJECTS

The City Travel Study 2021/2022 shall provide practical insights for urban tourism. However, this is not sufficient as a general basis due to the individualisation of travel, the great importance of urban travel for tourism as a whole, the dynamic of guest needs/market development and the different city types.

Therefore a differentiation between the following is needed:

- demand/development potential and main areas of demand in domestic tourism
- guest types (demand focus as well as assignment to social milieu structures – Sinus Milieus) and differences in needs, travel behaviour and deciding factors
- city types



# CITY TRAVEL STUDY 2021/2022: INDIVIDUAL EVALUATION

## Individual Evaluation of the City Travel Study 2021/2022 for your own city



- ➔ Preparation of the results of the City Travel Study 2021/2022 on individualised charts for your own city (level of awareness and topic suitability) in addition to the long version of the City Travel Study 2021/2022
- ➔ Representation of your own city in comparison to the average of all 150 cities and the reference group (Must-See Cities, Historic Highlights, Event Cities, Green-/Blue-Cities)

### Individual Evaluation:

**1,490,- Euro** *plus VAT*

- ➔ Individual Evaluation of the City Travel Study incl. comparison

Contact us to order your individual evaluation of the City Travel Study by e-mail: [dikken@eti-institut.de](mailto:dikken@eti-institut.de)

Our colleagues from PROJECT M and ST. Elmo's are at your disposal for the individual assessment and interpretation of the study results.

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## METHODOLOGY OF THE STUDY



**TYPE OF SURVEY:** survey with an online access panel



**TARGET GROUP:** representative survey of the German population from age 18-69 y. (n=6,984), with focus on people with an affinity for urban travel (n=5,037)



**OBJECT OF STUDY:** travel and information behaviour, interest in topics typical of urban travel, knowledge and suitability of 150 European cities



**SURVEY PERIOD:** middle of November – start of December 2021



### KEY SUBJECT OF THE SURVEY:

- motives for city trips
- probability of visiting cities and suitability for topics
- travel behaviour during and after Corona
- structure of respondents and social demographics

# 150 cities were involved in this study.

Aachen	Chemnitz	Lausanne	Leipzig	Norderstedt	Stade
Aarhus	Cologne	Leipzig	Leverkusen	Nuremberg	Stockholm
Amsterdam	Constance	Leverkusen	Lingen (Ems)	Oberhausen	Stralsund
Augsburg	Copenhagen	Lingen (Ems)	Linz	Offenbach on the Main	Stuttgart
Baden-Baden	Cottbus	Linz	Lisbon	Oldenburg (Oldenburg)	Szczecin
Bamberg	Darmstadt	Lisbon	Ljubljana	Oslo	Tallinn
Barcelona	Dortmund	Ljubljana	Lodz	Osnabrück	Trier
Basel	Dresden	Lodz	London	Paderborn	Tübingen
Bayreuth	Duisburg	London	Lübeck	Paris	Turin
Bergisch Gladbach	Düsseldorf	Lübeck	Lucerne	Passau	Ulm
Berlin	Eisenach	Ludwigshafen	Ludwigshafen	Pforzheim	Venice
Bern	Erfurt	Lugano	Lugano	Potsdam	Vienna
Bielefeld	Erlangen	Lüneburg	Lüneburg	Prague	Warsaw
Bochum	Essen	Luxembourg	Luxembourg	Recklinghausen	Weimar
Bologna	Flensburg	Lucerne	Lyon	Regensburg	Wetzlar
Bolzano	Florence	Madrid	Madrid	Reutlingen	Wiesbaden
Bonn	Frankfurt on the Main	Lyon	Magdeburg	Rome	Wilhelmshaven
Brandenburg an der Havel	Freiburg im Breisgau	Magdeburg	Mainz	Rostock	Wismar
Bratislava	Fulda	Milan	Mannheim	Rotterdam	Wolfsburg
Bremen	Fürth	Mannheim	Marburg	Saarbrücken	Worms
Bremerhaven	Gdansk	Marburg	Milan	Saint Gallen	Wroclaw
Brunswick	Gelsenkirchen	Mainz	Mönchengladbach	Saint Pölten	Wuppertal
Brussels	Geneva	Munich	Munich	Salzburg	Würzburg
Budapest	Gießen	Münster	Münster	Schwerin	Zurich
Celle	Görlitz	Mönchengladbach	Neuss	Speyer	Zwickau

Reference groups were formed, in order to classify the competences and to improve the comparability between different cities and city types.

For the evaluation four subgroups were formed according to the specific view of the target group on the cities and their portfolio for guests. These subgroups are used to classify the individual values of the cities. The classification serves as a guideline.

#### *Must See-Cities*

*Tourism metropolises such as London, Paris etc. with a magnetic effect and often a large number of internationally renowned attractions*

#### *Historic Highlight-Cities*

*Cities such as Bratislava, Potsdam, Krakow etc. with a large number of important historic-cultural buildings and sites*

#### *Event Cities*

*Cities such as Frankfurt, Lyon, Cologne etc. with a great occasion-related event focus among the visitors*

#### *Green-/Blue Cities*

*Cities such as Aarhus, Lübeck, Lucerne etc. with a high degree of green or water-specific urban and surrounding areas*

**Must-See Cities**

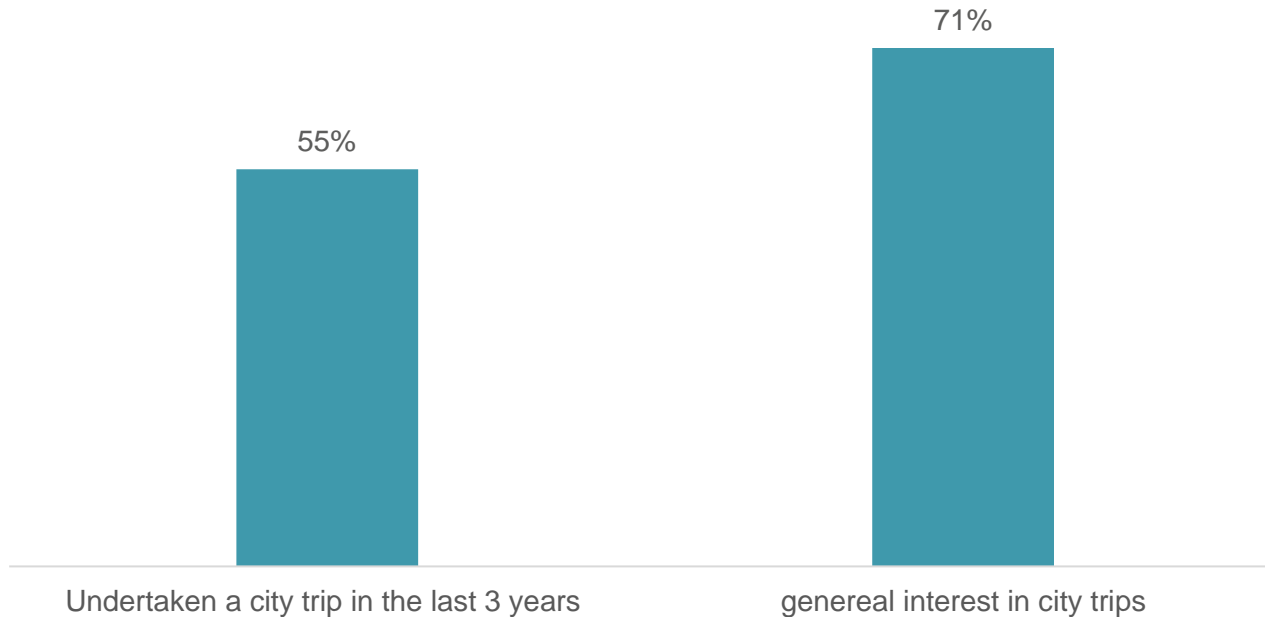
**Historic Highlights**

**Event Cities**

**Green-/Blue-Cities**

Half the Germans have undertaken a city trip in the past three years – just under three quarters can imagine a city trip in general.

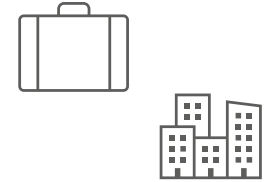
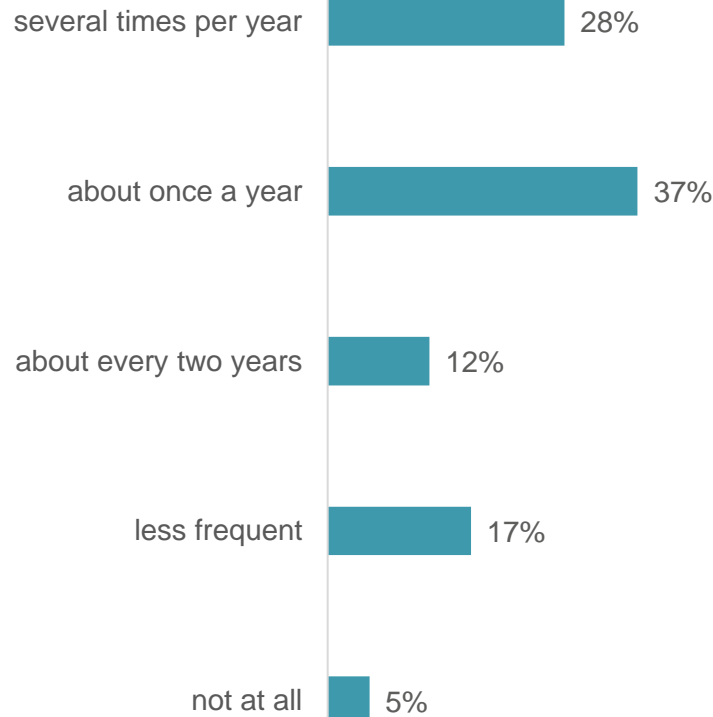
### Basic potential for city trips



Question: Which of the following types of holiday have you undertaken in the past three years? And which of the following holiday types come generally into question for you?; Base: all respondents (n=6,984)

Of those who have undertaken a city trip or have been interested in doing so in the past three years, about two-thirds travel at least once a year.

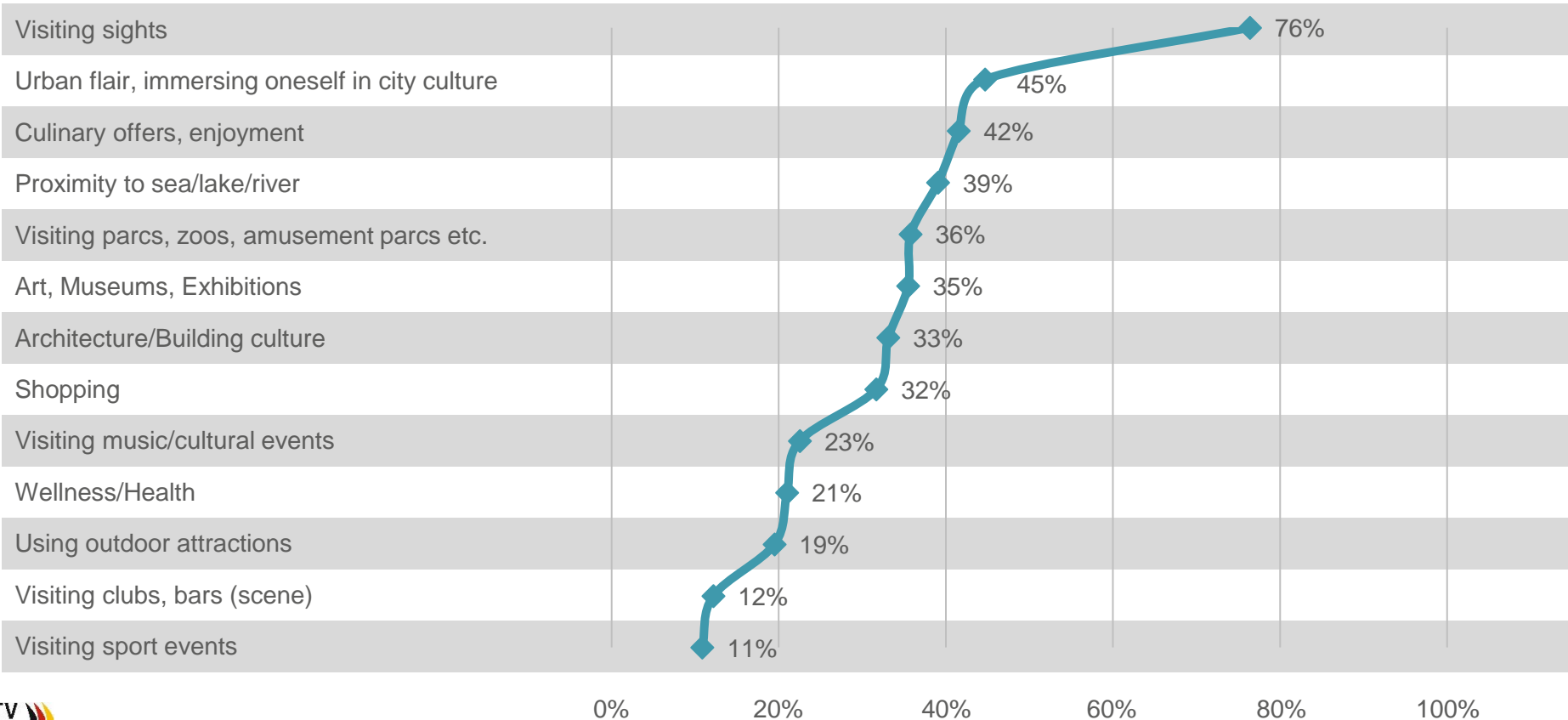
### Frequency of city trips





# Visiting sights is by far the main motive for private city trips.

## Motivation for private city trips



Question: For what reasons do you primarily go on private city trips? (multi-punch); Base: City trip aficionados (n=5,037)

When choosing a city trip destination, the cost-benefit ratio and a good accommodation are most relevant – sustainable offers are important for one in ten.

### Importance of different factors when choosing a city trip destination

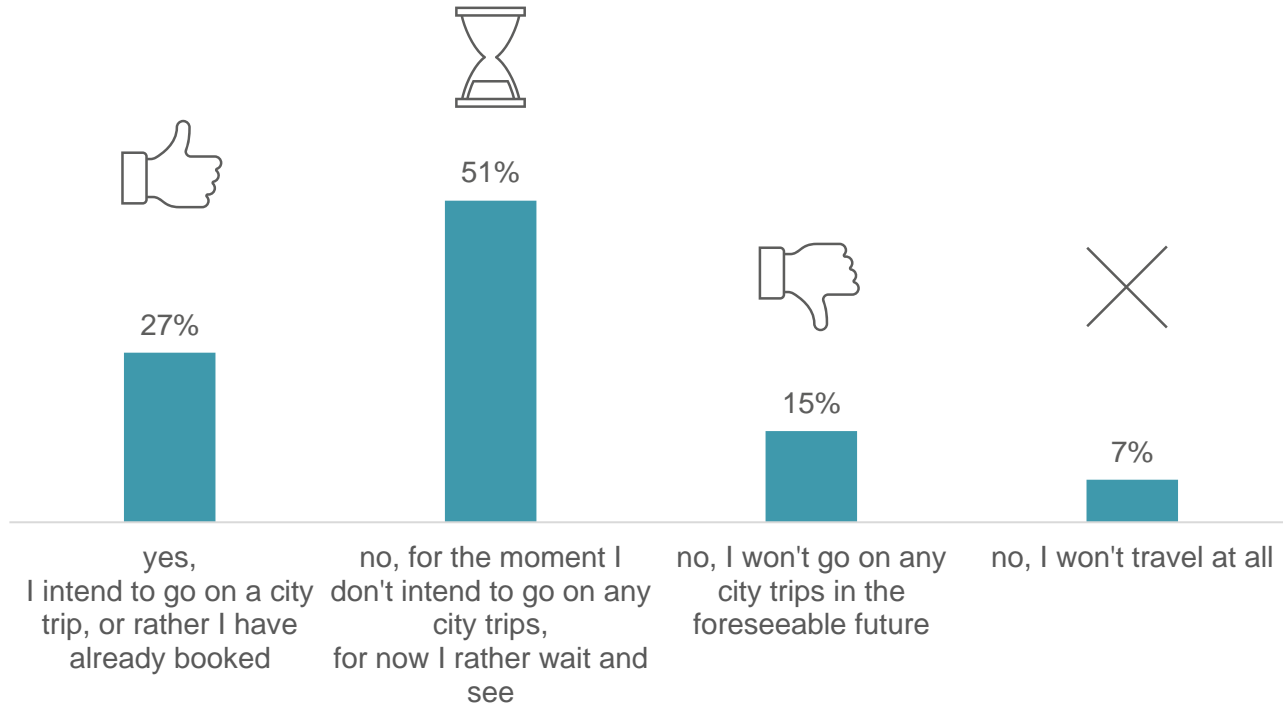


Question: What are the most important factors for you, choosing your city trip destination? (multi-punch); Base: City trip aficionados (n=5,037)

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More than a quarter of those with an affinity for urban travel currently want to go on city trips – about half of them wants to wait and see.

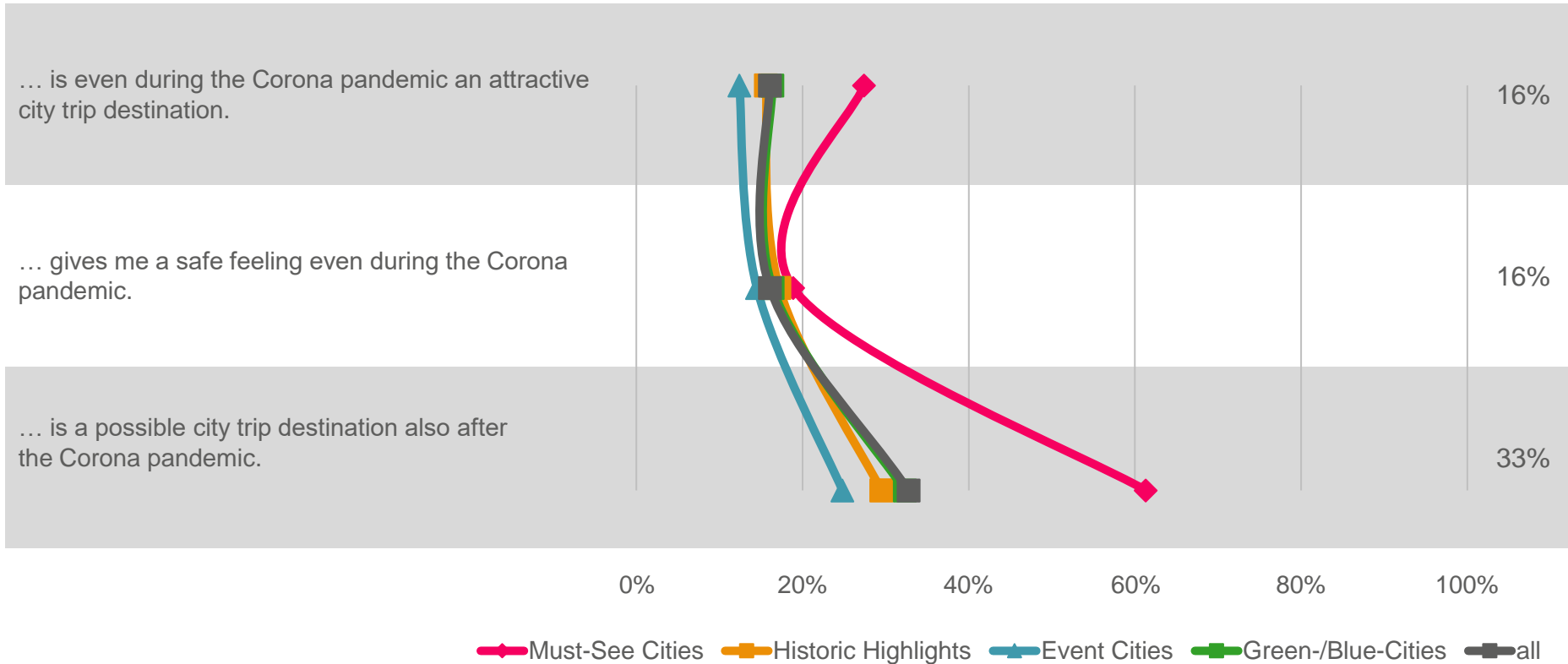
### Current undertaking of city trips



# Must-see cities are more attractive as destinations than the other city types during, but especially after the pandemic – similar feeling of safety in the cities.

## Perception during the Corona Pandemic

Ø all



In the ranking of the most attractive city trip destinations during the Corona pandemic, Hamburg, Berlin and Munich are the TOP 3 of all cities, followed by Copenhagen, Amsterdam and Vienna.

Attractive city trip destinations during the Corona pandemic – Ranking of the TOP 10

① **HAMBURG** 

② **BERLIN** 

③ **MUNICH** 

④ Copenhagen ⑤ Amsterdam ⑥ Vienna

⑦ Madrid ⑧ Oslo ⑨ Heidelberg ⑩ Dresden

Question: For each of the following statements, please tell me your opinion to which of the cities you are familiar with, the statement particularly applies;  
Base: City trip aficionados, who are familiar with the cities in each case (n=129-334)

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# Your individual evaluation of the City Travel Study 2021/2022 gives you more information about ...

**Motivation for private city trips**

**Importance of different factors when choosing a city trip destination**

**Perception during the Corona Pandemic**

**Chosen types of accommodation**

**Company on city trips**

**Recommendations from experts**

**Information behavior**

**Willingness to undertake private city trips**

**Recommendations from experts**

**Preferred forms of mobility during the Corona pandemic**

**Current potential for city trips among the German population**

# Contact for queries and orders of your individual evaluation



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