



# Tourism in European Cities and Corporate Social Responsibility

## Consumer behavior and needs

ITB Berlin – 11<sup>th</sup> March 2011  
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## Cities must balance the expectations of guests and the needs of the inhabitants

**Traumziel Manhattan**  
Wirtschaftskrise hin oder her:  
Reisen in den Big Apple boomen  
auch in diesem Jahr.

**Berlin** glänzt mit  
Besucher-Rekord

**Rom**  
Gebühr für jede  
Übernachtung  
in Rom

**Ins Herz der  
Städte reisen**  
Städtereisen zählen nach wie vor  
zu den Highlights in der  
Touristik-Branche.

**Dubrovnik**  
Ruhe nach dem  
Kreuzfahrer-Ansturm

**Berlin**  
Kreuzberger protestieren  
gegen "Touristifizierung"

**Kreative Städtetrips**  
Bier brauen  
statt Sightseeing

**Tourismus  
in  
Deutschland  
boomt**

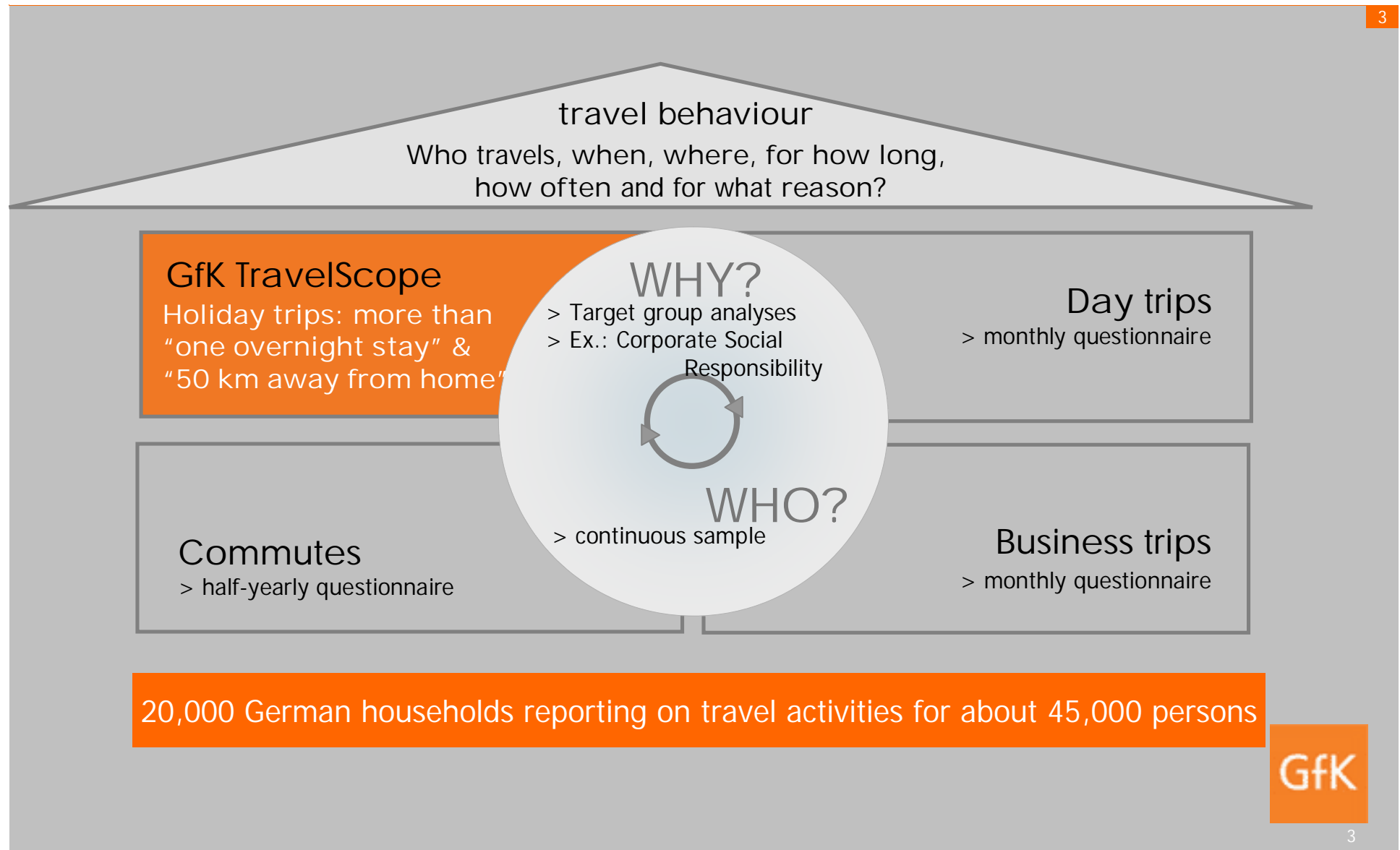
**Das Jahrtausend  
der Städte**

GfK

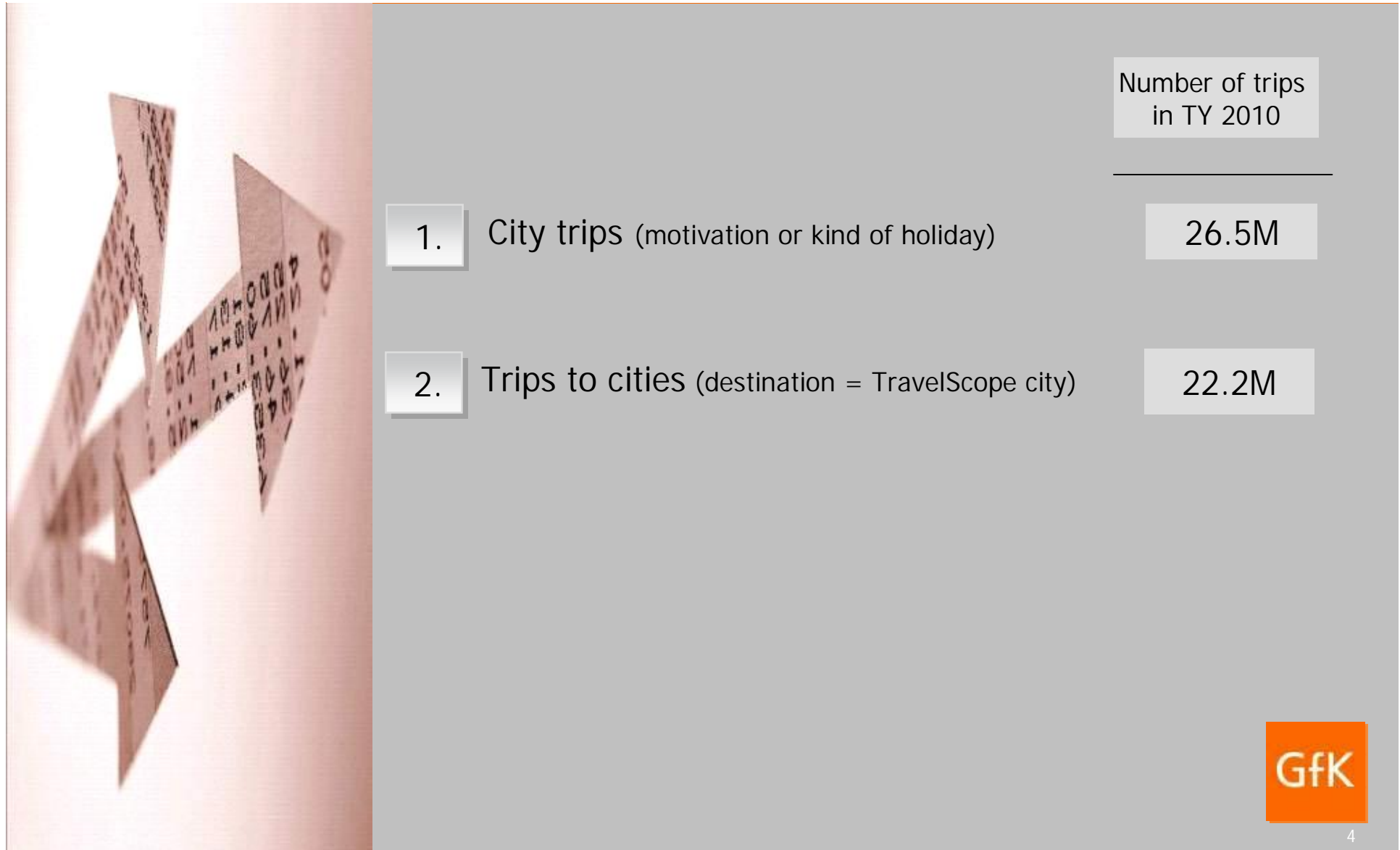
Source: Google research, March 2011

## GfK MobilitätsMonitor: survey modules

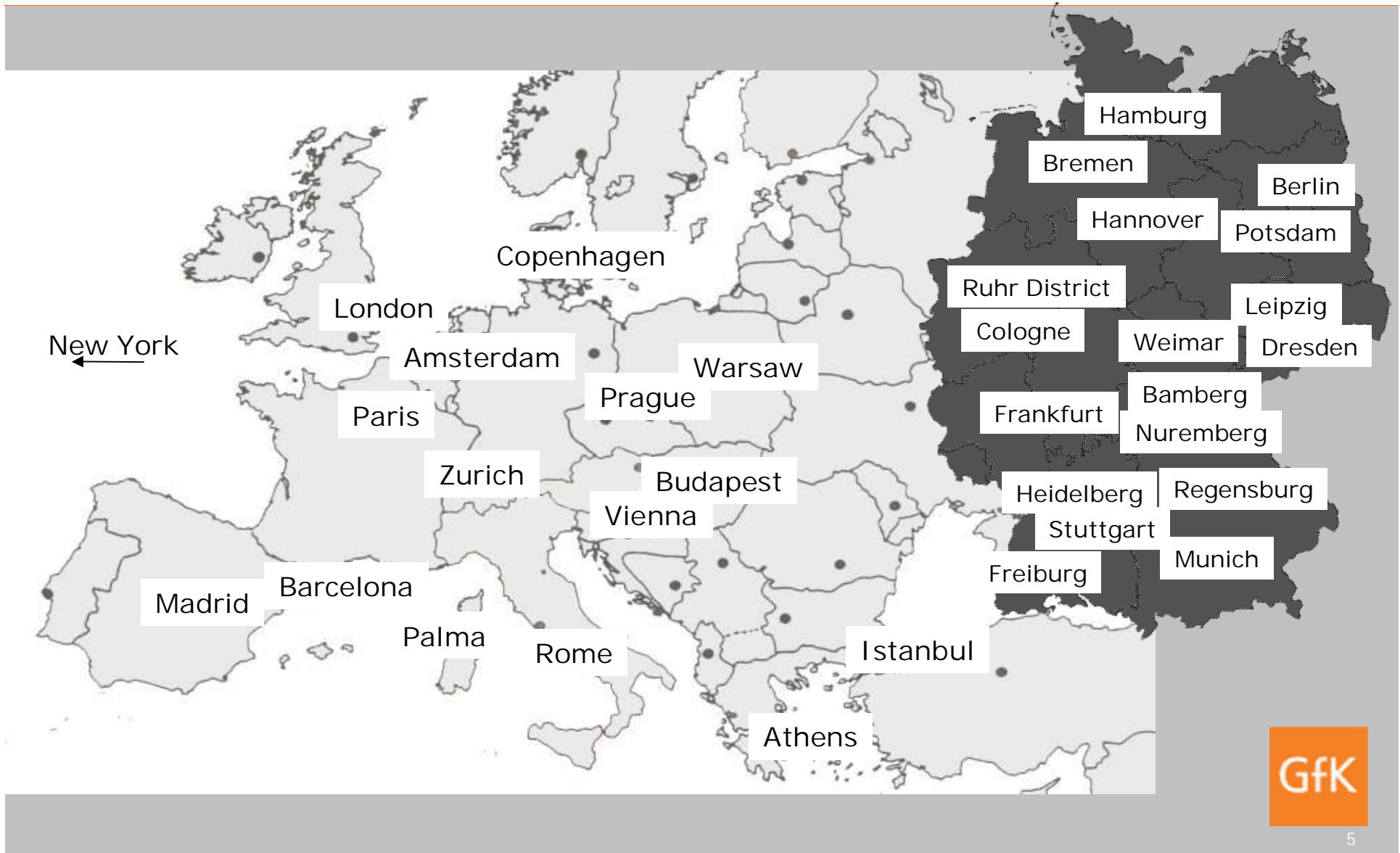
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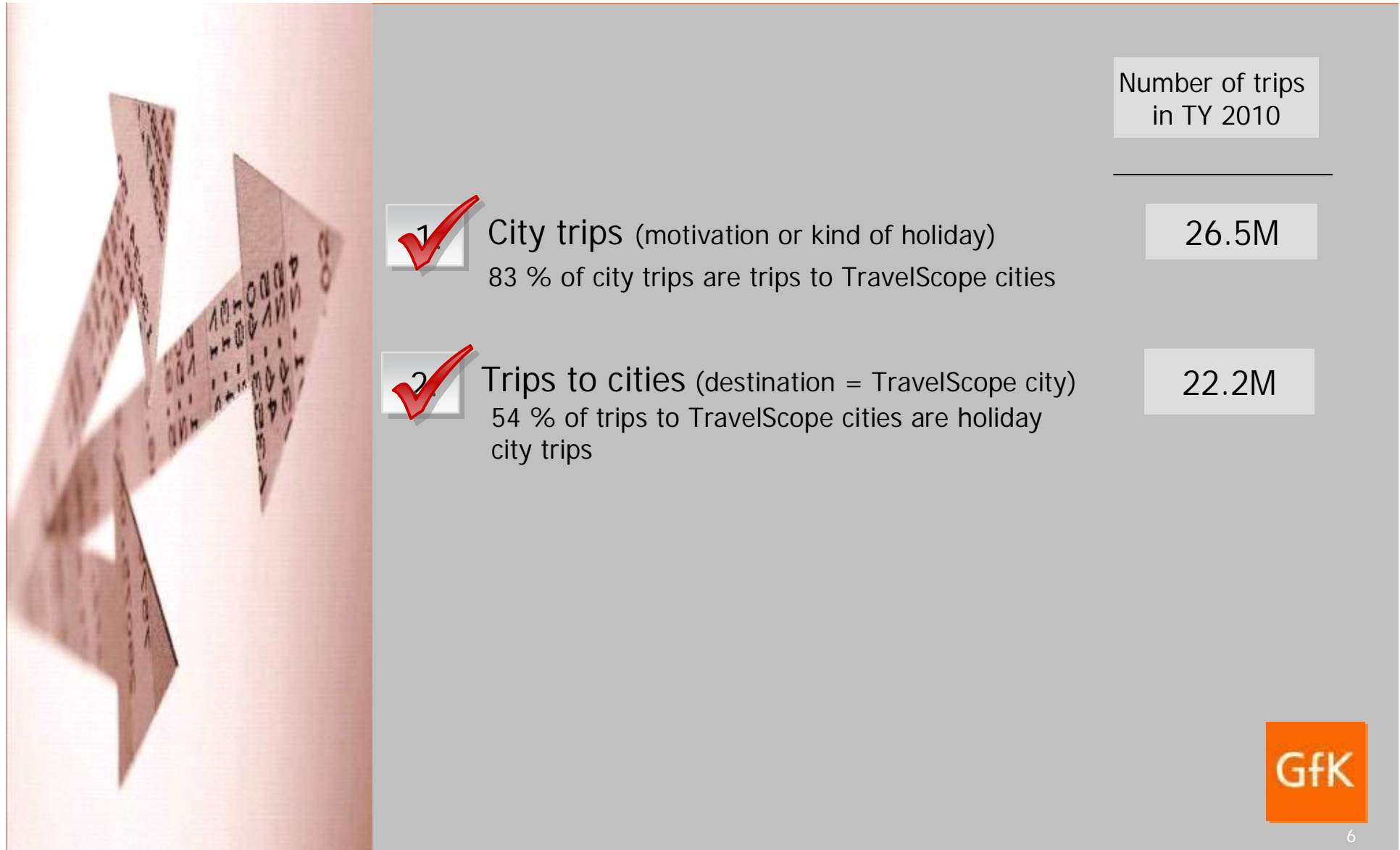
How many trips which are "more than one over night stay" and "50 km away from home" are city trips? Which definition of market is relevant?



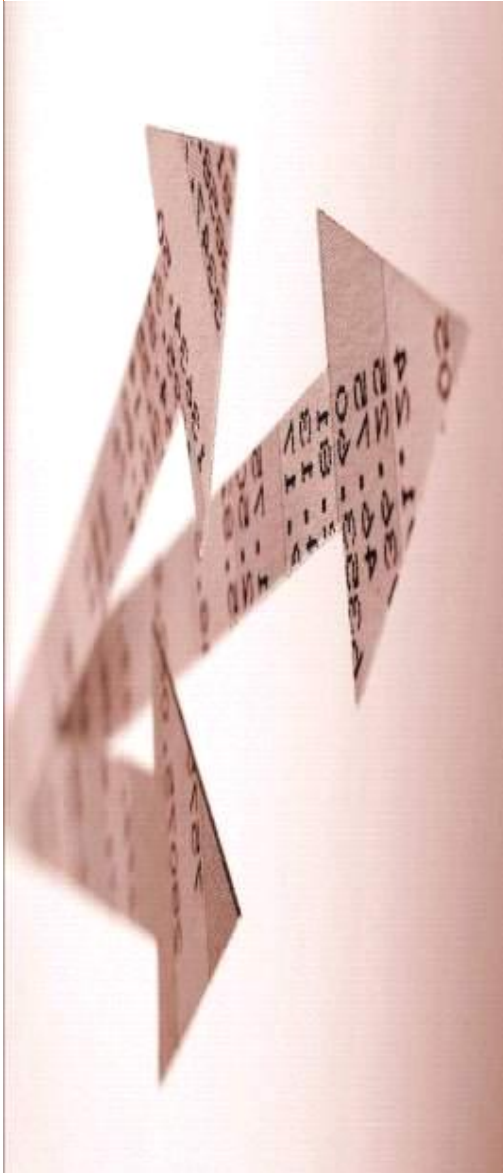
# Definition: City destinations listed in the TravelScope questionnaire



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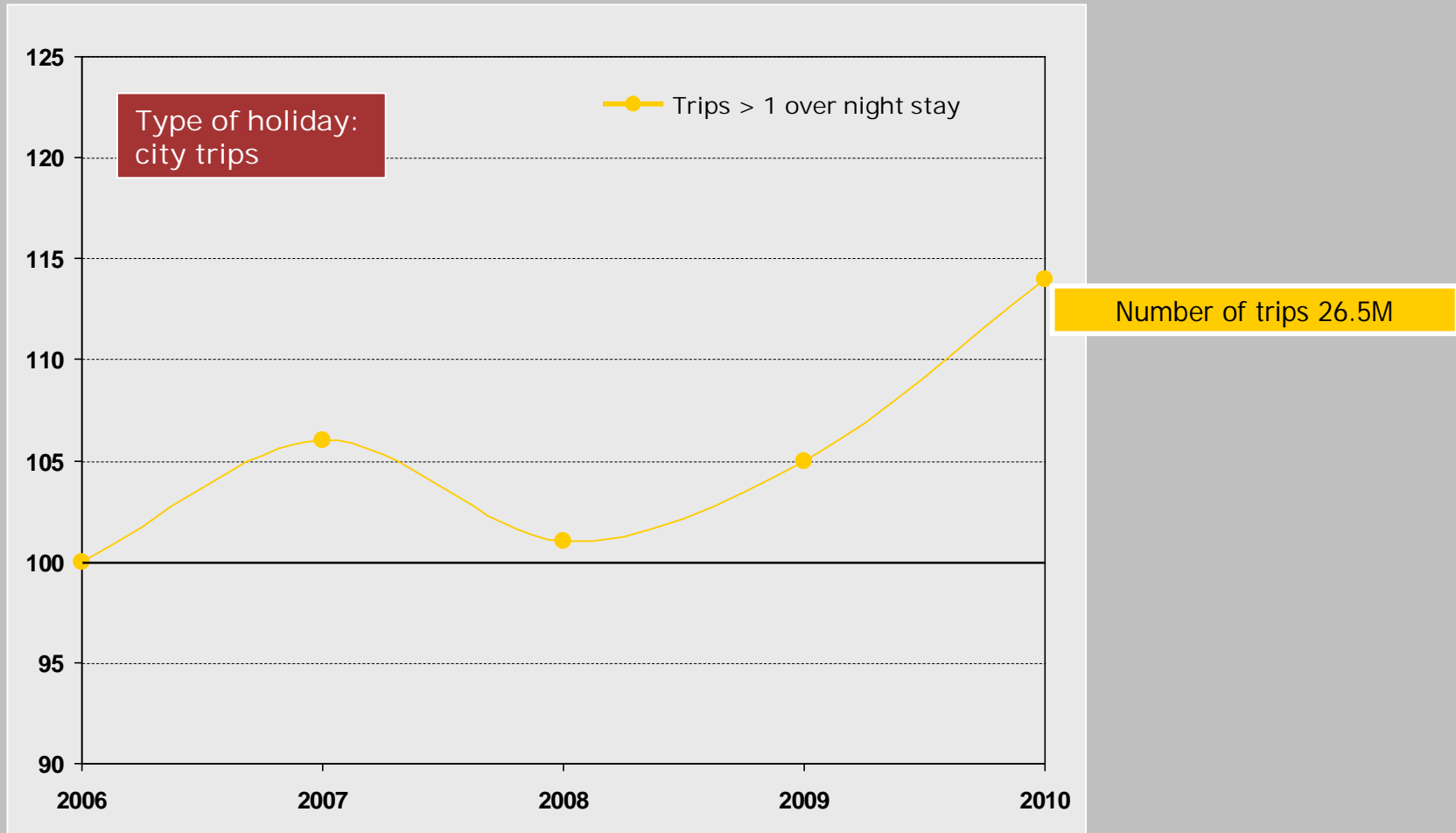


# Agenda



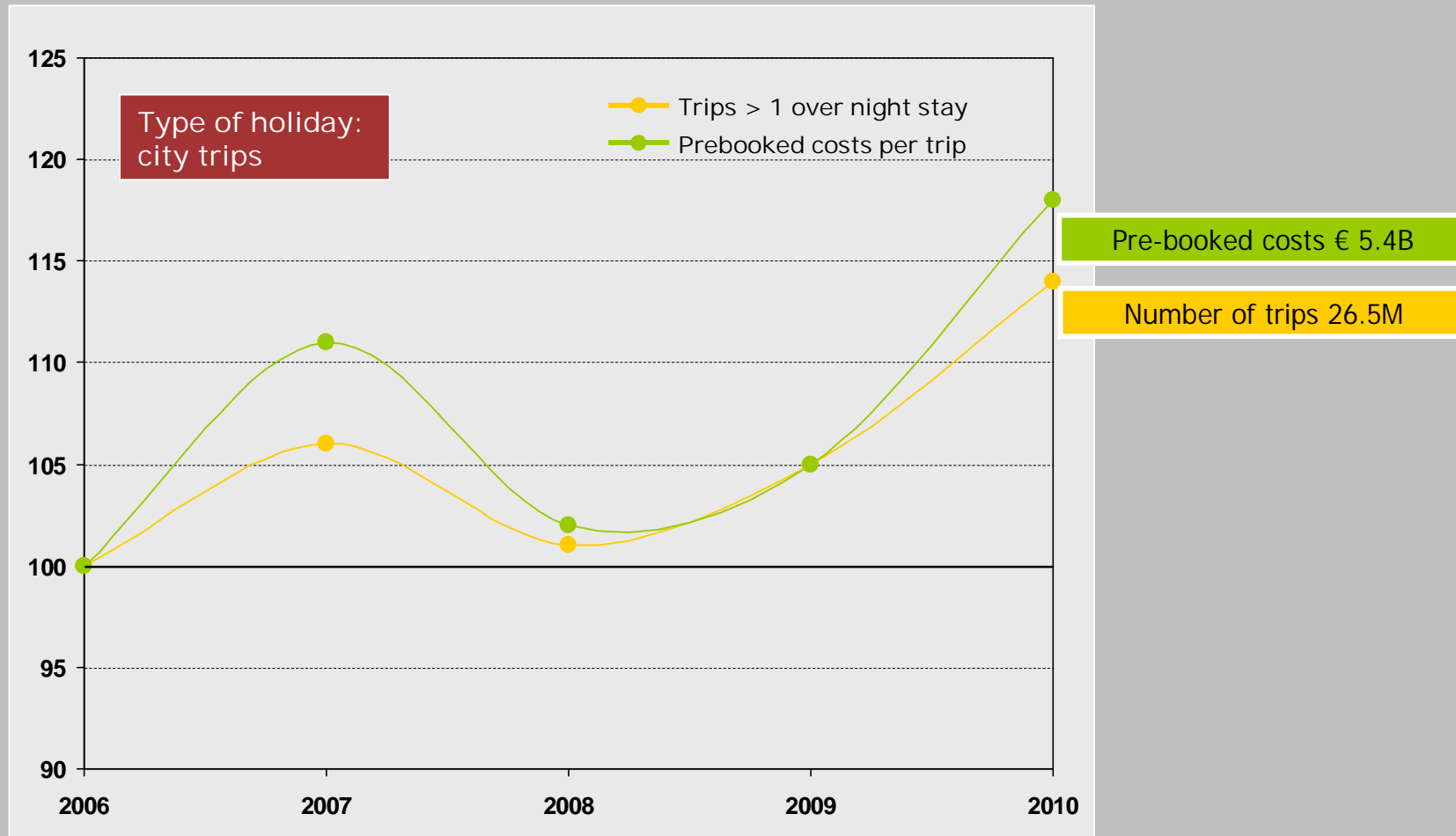
1. ✓ City trips (kind of holiday)  
How is the market for city trips developing?
  2. Trips to cities (destination = TravelScope city)  
What varies between cities / destinations?
- ↓
3. Focus on Corporate Social Responsibility

# City trips (a type of holiday) are increasing significantly in the German market again

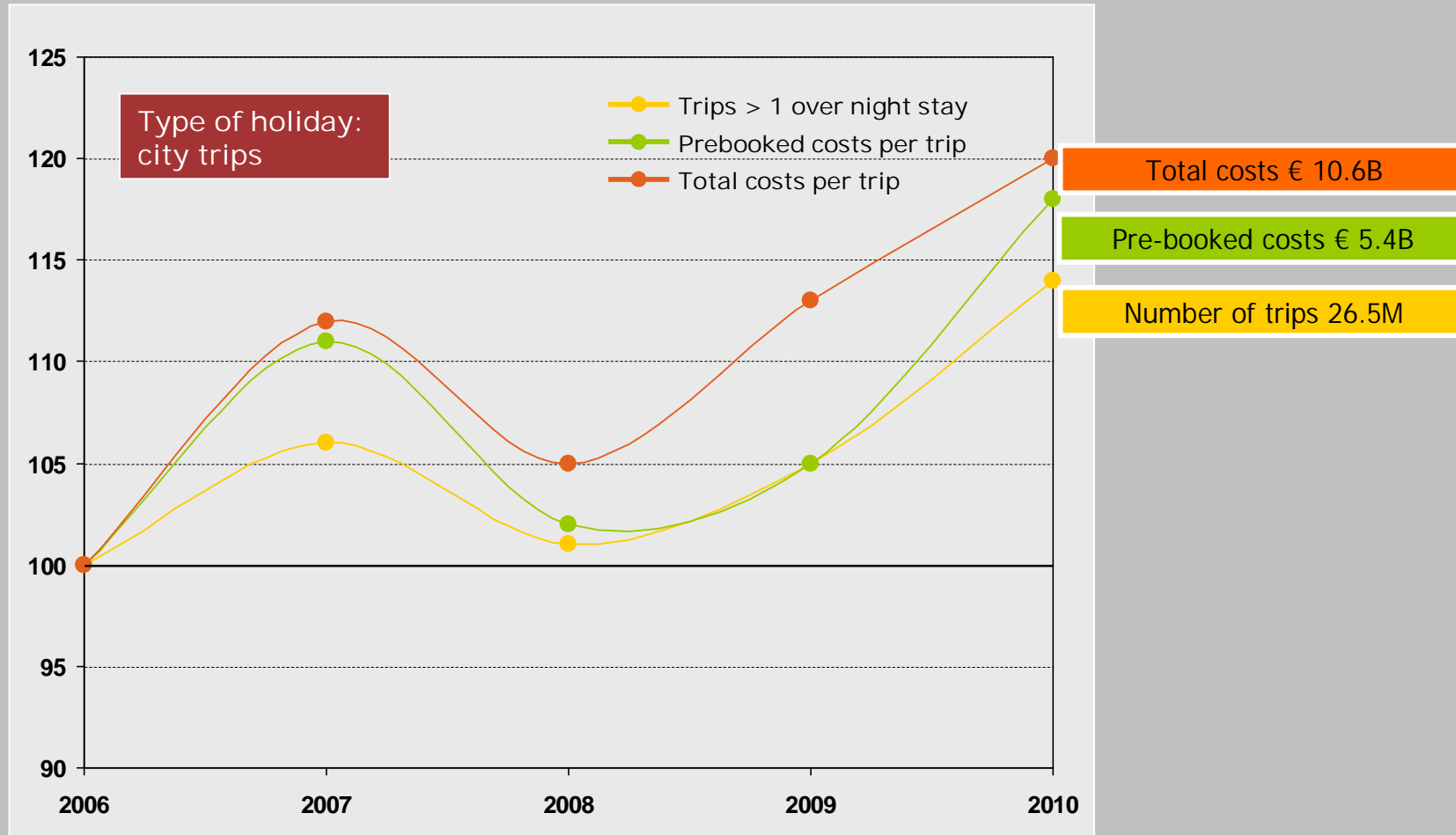


Source: GfK TravelScope, 20,000 households, TY 2009/2010  
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City trips (a type of holiday) are increasing significantly in the German market again: pre-booked turnover is rising even more quickly



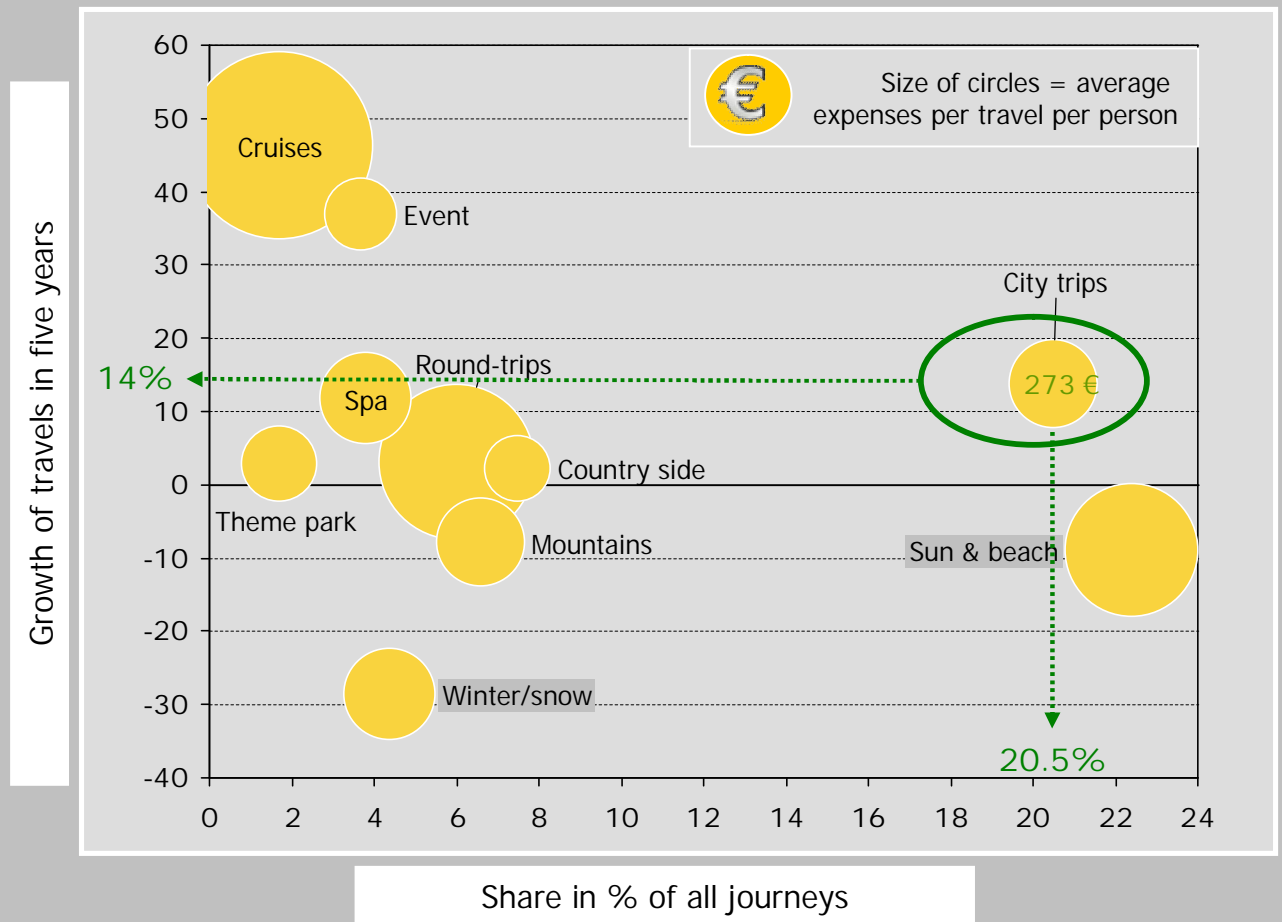
# City trips (a type of holiday) are increasing significantly in the German market again: total costs are not as strong



One out of five journeys taken by Germans are city trips. In 2005 city trips increased to 14%

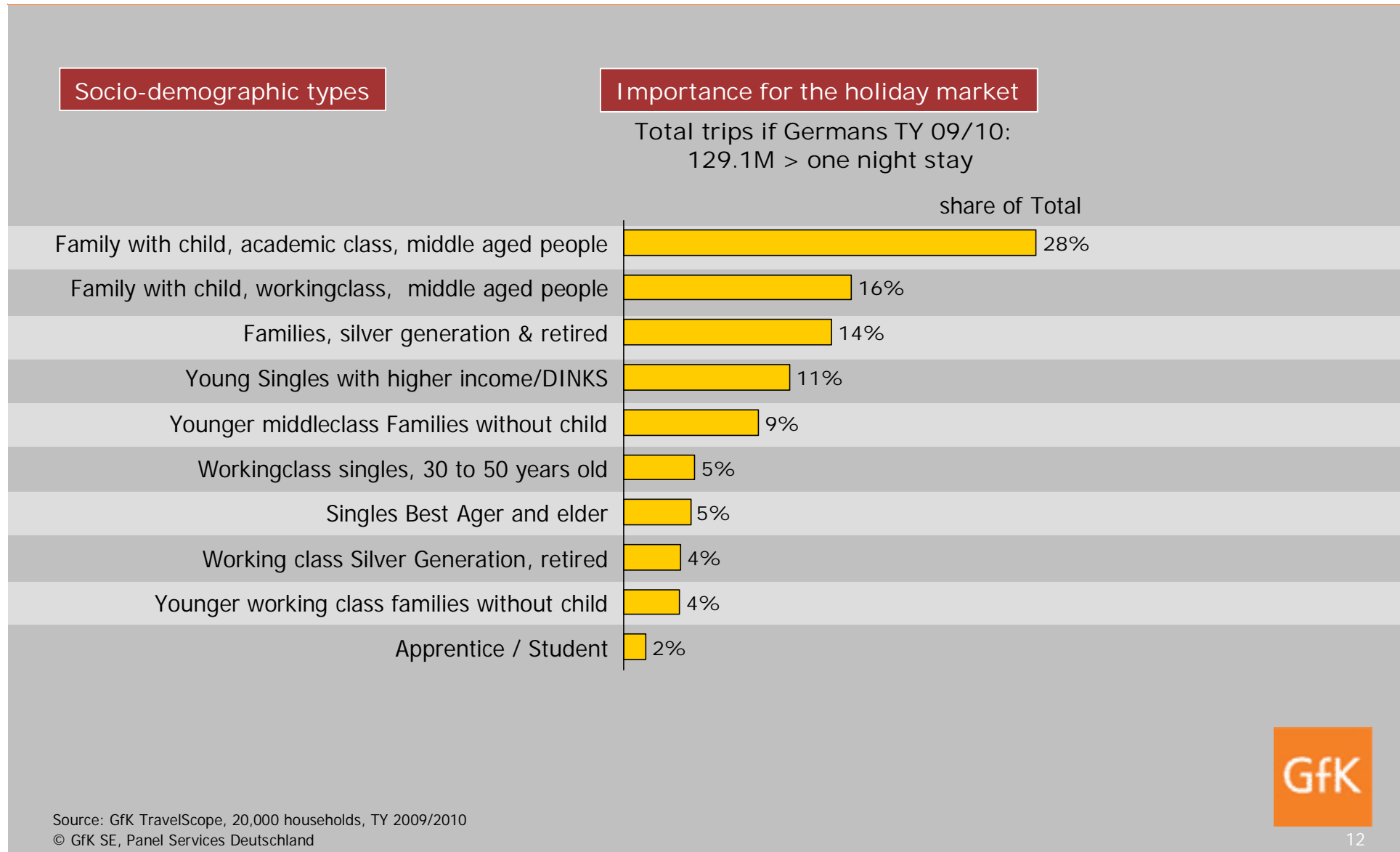
Type of holiday

Development and meaning of travel types (period TY 09/10)

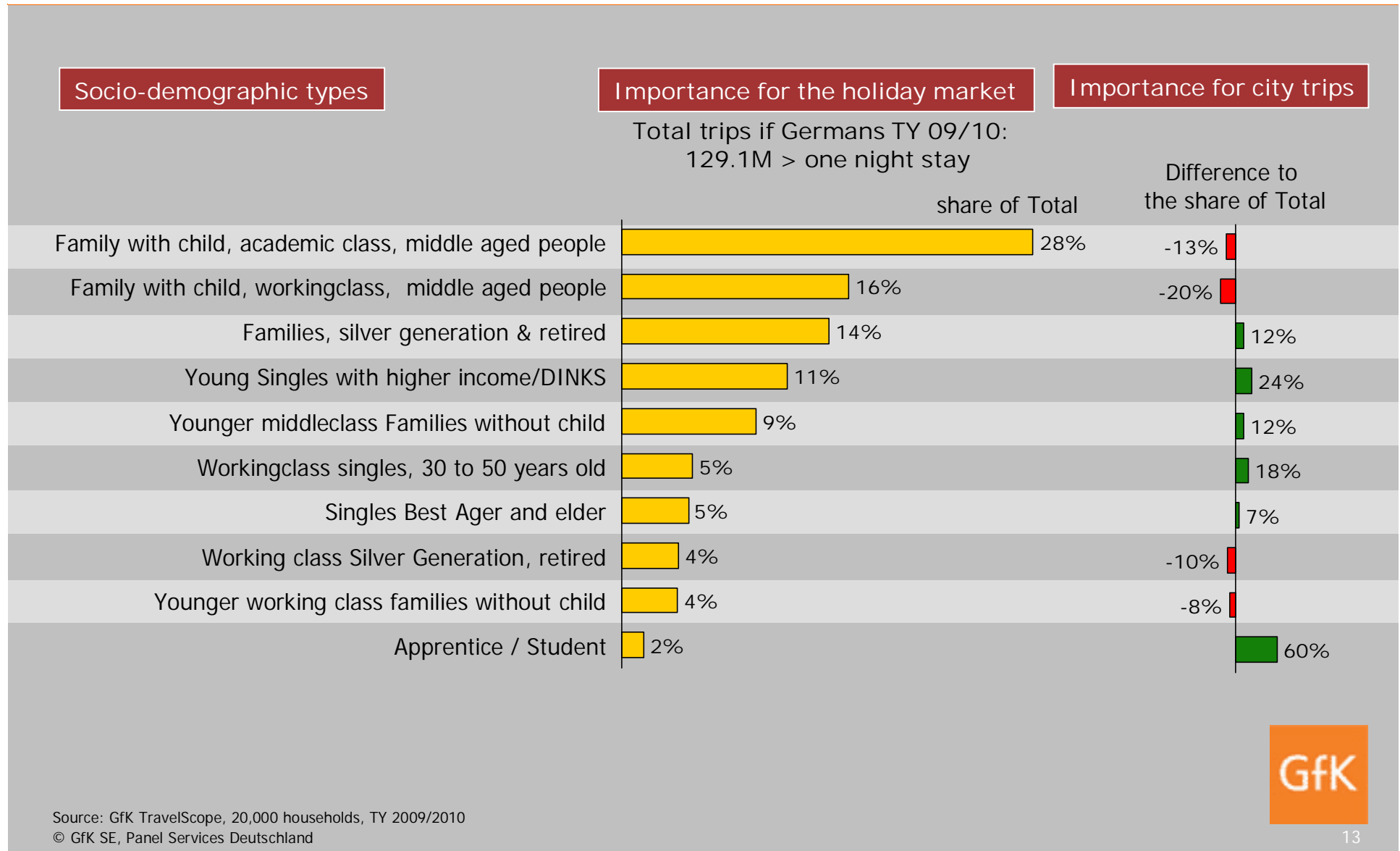


Source: GfK TravelScope, 20,000 households, TY 2009/2010  
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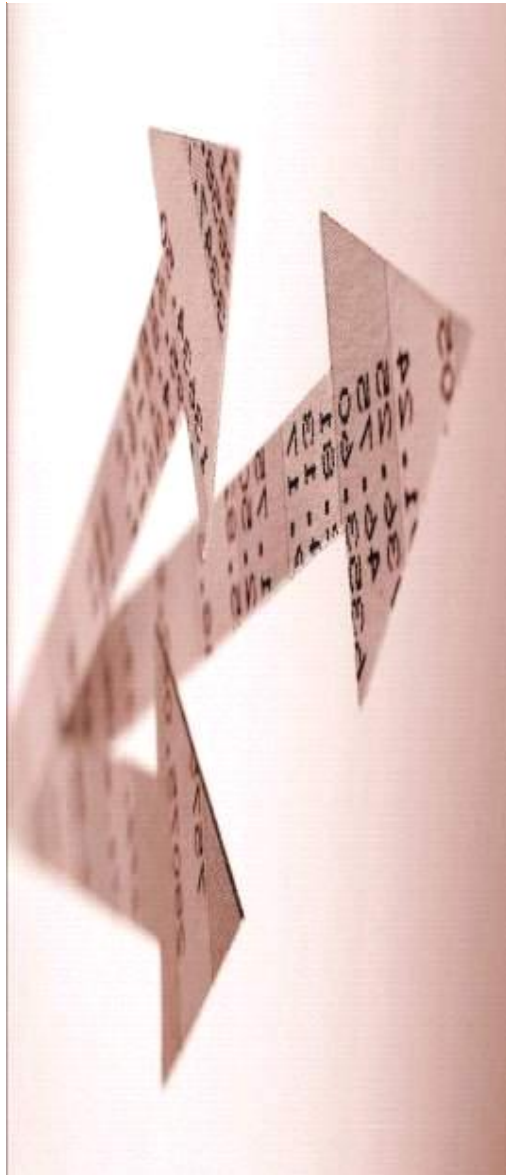
Most city trips are taken by families with children, but their share is lower than average (-13% and -20%). Young singles and DINKS are above the average (+24)



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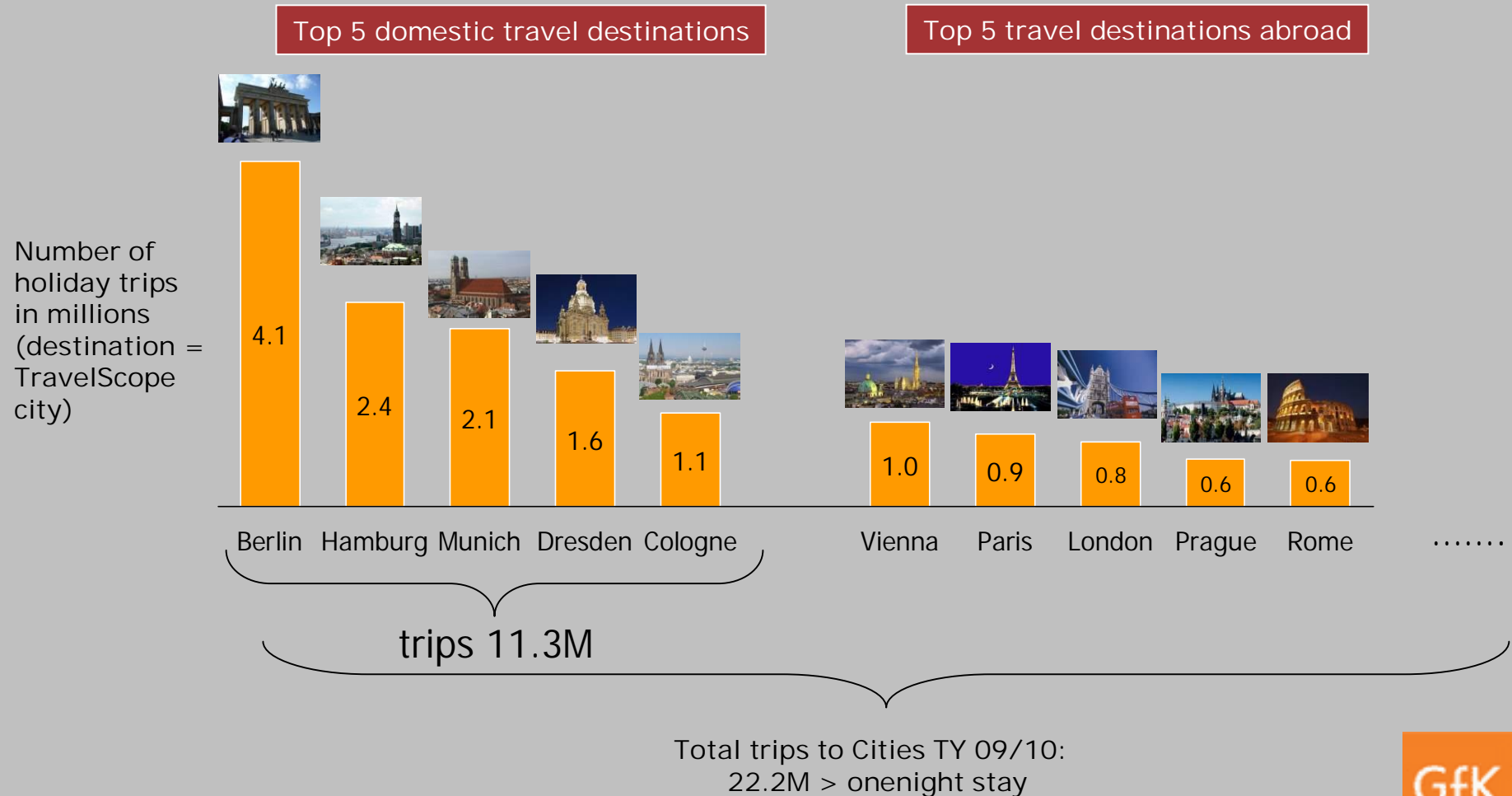


# Agenda



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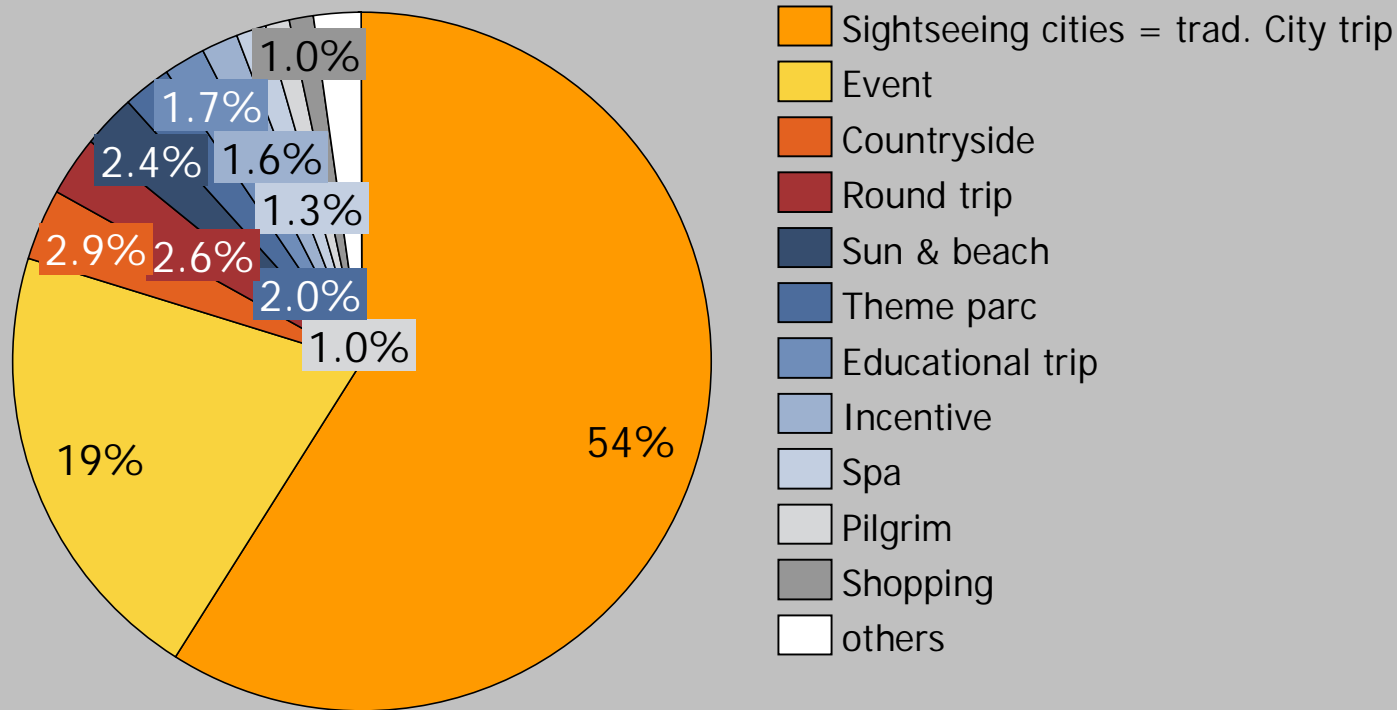
Berlin welcomes 4.1M Germans holiday guests a year. The top 5 domestic city destinations represent nearly 50% of city trips (TravelScope city destinations)



3/4 (54% + 19%) of trips to cities are for sightseeing or events

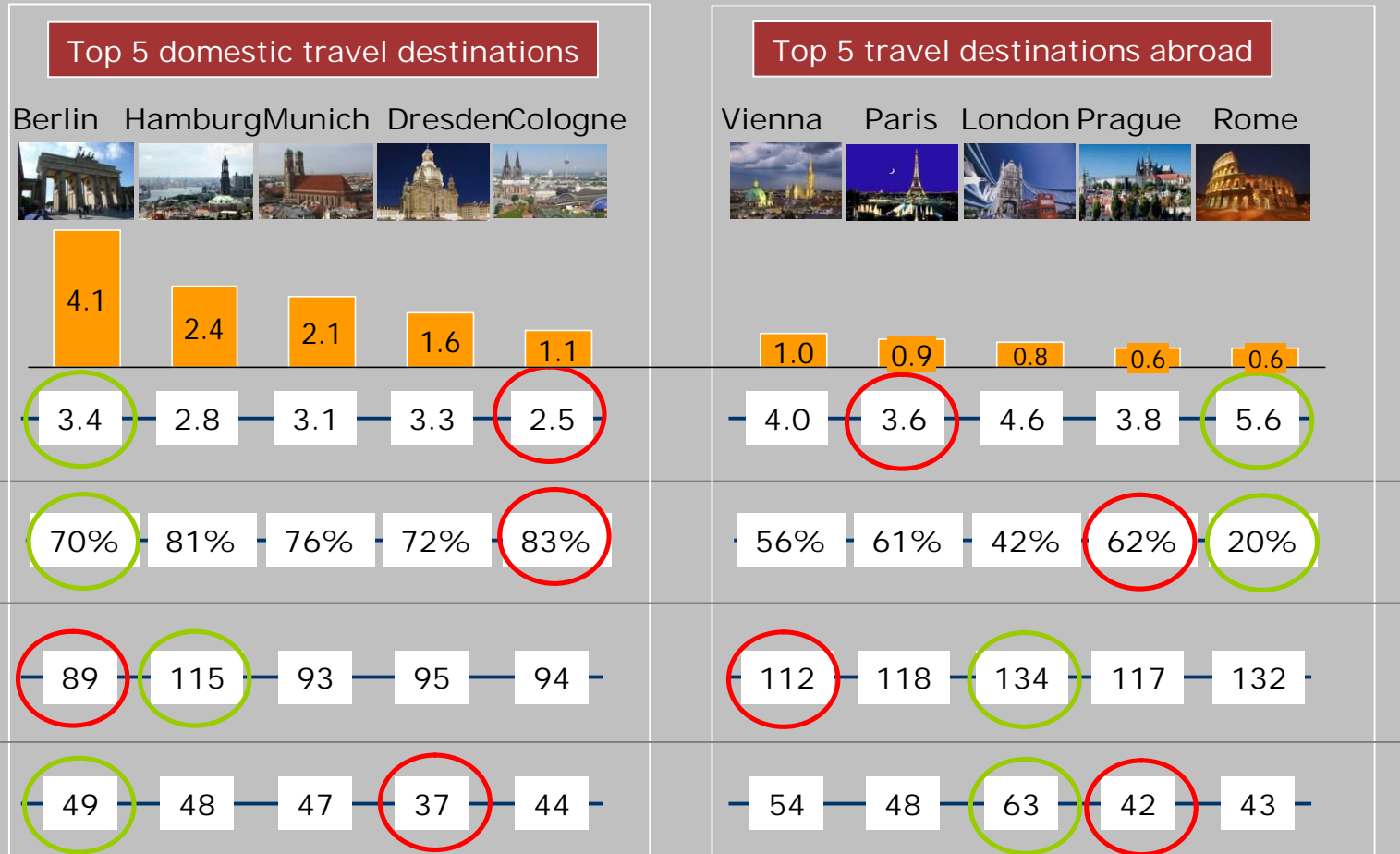
Types of holiday taken to cities

Total trips to cities TY 09/10:  
22.2 M > one night stay  
share of total city trips



Source: GfK TravelScope, 20,000 households, TY 2009/2010  
© GfK SE, Panel Services Deutschland

# Travel behaviour varies between city destinations



Source: GfK TravelScope, 20.000 households, TY 2009/2010  
 © GfK SE, Panel Services Deutschland

Every city offers additional attractions. Besides the main target occasion, visiting the city, each city has its own motivating characteristics.

Domestic travel destinations

Share city trips kind of holiday

Top 3



Berlin

62%

Trips during vacations  
Sightseeing  
Culture/education



Hamburg

53%

Events/musicals  
Shopping  
Trips during vacations



Munich

48%

Sports/wellness  
Trips during vacations  
Shopping



Dresden

64%

Stay at round trip  
Incentives  
Sightseeing



Cologne

46%

Events/musicals  
Festivities  
Shopping

Travel destinations abroad

Share city trips kind of holiday

Top 3



Vienna

73%

Cruises/boat  
Culture/Education  
Sightseeing



Paris

73%

Theme parks  
Language  
Sightseeing



London

75%

Language  
Shopping  
Culture/education



Prague

81%

Stay at round trip  
Sightseeing  
Trips during vacations



Rome

68%

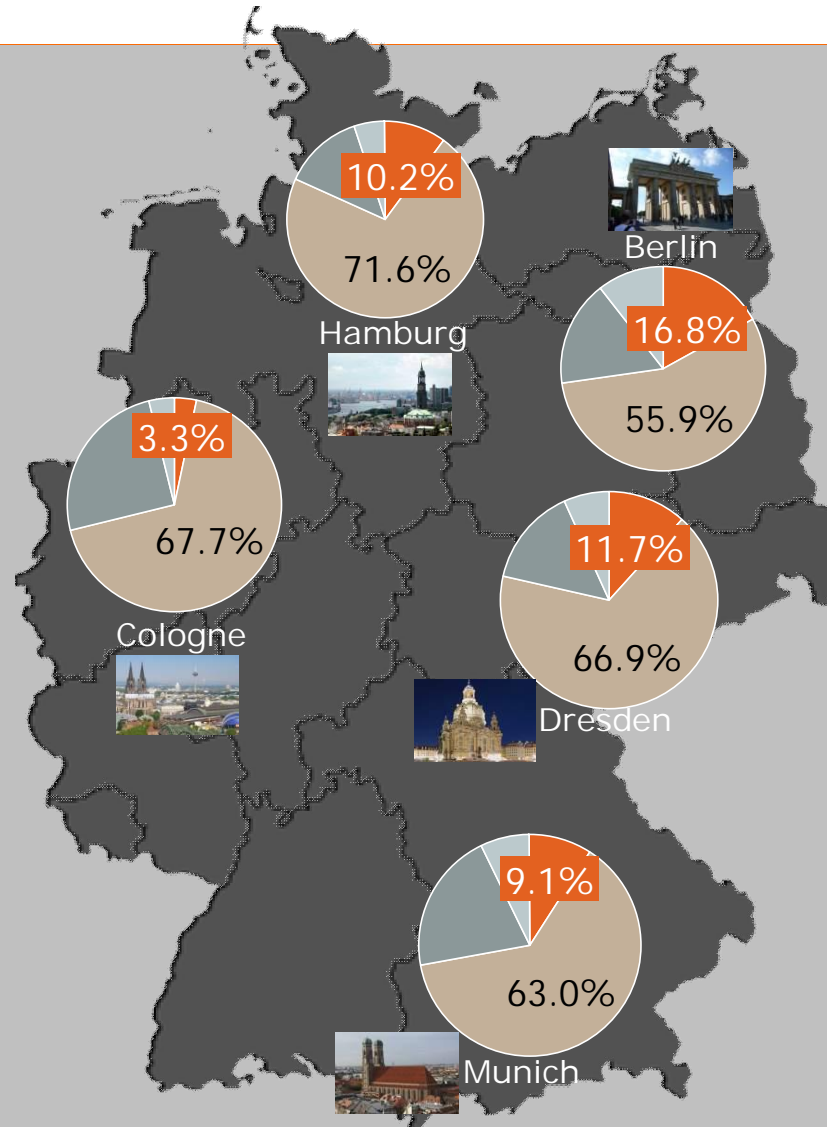
Pilgrimage  
Culture/education  
Language



Additional note: Berlin maintains the highest share of tourists. However, Hamburg holds a particular high share of daily visitors

Importance of travel reasons (share %)

- Holiday trips > one night stay
- Daily trips
- Business trips
- Friends/family/relatives incl. overnight stay



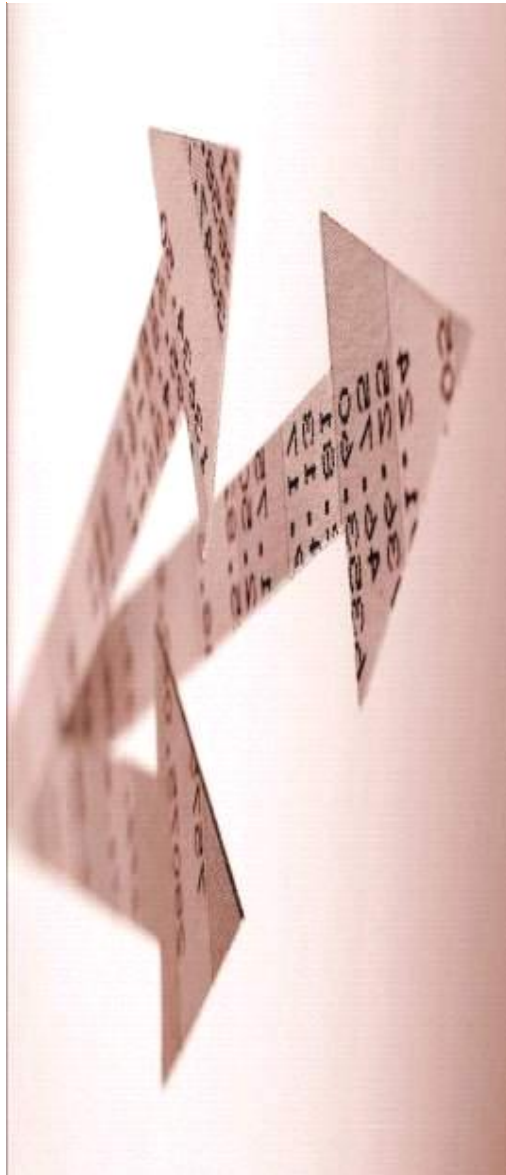
Source: GfK MobilitätsMonitor;  
 holiday and business trips as well as daily trips

© GfK SE, Panel Services Deutschland

Source: GfK TravelScope, 20,000 households, TY 2009/2010



# Agenda



- 1 ✓ City trips (motivation or kind of holiday)  
How is the market for city trips developing?
  - 2 ✓ Trips to cities (destination = TravelScope city)  
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- 3 ✓ Focus on Corporate Social Responsibility

A photograph of a man with a beard, looking down at a compact fluorescent lightbulb (CFL) that is partially buried in the sand on a beach. The background is a bright, out-of-focus beach scene with waves and a cloudy sky. The man's hands are clasped together in the foreground, resting on the sand.

## Corporate Responsibility (CR)

Values and requirements of German consumers  
towards socially responsible actions of companies

-> Cities have a two-sides role: for guests and inhabitants!

# Segmentation of German consumers based on their affinity towards certain CR topics

## CR dimensions

### Education



- > Apprenticeship
- > Advanced training
- > Research
- > ...

### Environment



- > Conservation
- > Climate Protection
- > Recycling
- > ...

### Health



- > Nutrition
- > Healthcare
- > Sports
- > ...

CR



- > Development aid
- > Human rights
- > Associations
- > ...

### Society



- > Site policies
- > Trades union
- > Child labor
- > ...

### Work

# People with homogeneous value profiles have been segmented into 5 different CSR types

Eigenverantwortliche Familienmenschen



Self-reliant family persons

19.9%

- Active life within their own tight cosmos

Verantwortungsbewusste Engagierte



Responsible committed people

21.2%

- Great interest in social problems

Fortschrittliche Macher



Progressive doers

18.2%

- Great importance in being proactive, in diligence and in career

Ich-zentrierte Genießer



Self-centered savorers

21.2%

- Own wellbeing is most important

Kritische Konsumierende



Critical consumers

19.5%

- Great importance in quality (also nutrition)

%-details = shares based on universe

Source: GfK TravelScope, 20,000 households, TY 2009/2010

© GfK SE, Panel Services Deutschland



# Clear profile of travel destinations for city trips among the different CSR target groups

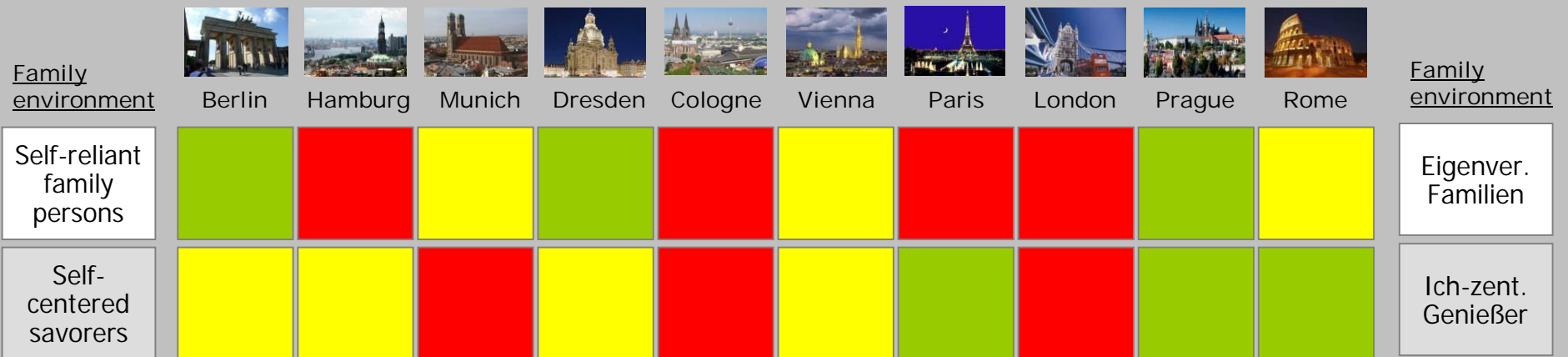


Source: GfK TravelScope, 20,000 households, TY 2009/2010  
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# Which target group prefers which travel destination for city trips today?

overrepresented < 110  
  average 90 - 110  
  underrepresented > 90



## Summary

- Cities have been always a special cultural attraction for holiday trips.
- Cities have a dual responsibility: to guests and inhabitants.
- City tourism can be defined by “motivation or a type of holiday trip” or by destination.
- Myth: city trip = short trip: Only every third short trip (2 to 4 days) is a city trip.
- City trips make up 20% of all trips in the German travel market.
- Germans yearly spend €10.6B, including costs on site, for city trips.
- Its importance has been significantly growing within the last few years.
- 67% of all city trips take place within Germany. Already the German top 5 account for around 11M trips every year.
- Besides highlights such as sightseeing and events, there are other characteristic travel motivations representative for each city.
- Thus Berlin is above average for sightseeing, whereas Hamburg or Cologne are significantly attractive for their events and musicals. London attracts with “language” whereas Rome attracts “pilgrims”.
- 18% of holiday trips are made from households which pay attention to ecological sustainability and compliance of ethical standards. 22% of city trips are taken by these households.
- Five types of CR can be identified in consumer behaviour.
- Each CR type tends favor certain cities. Thus “self-reliant family persons” prefer Berlin and Dresden and over Hamburg. In international city trips this CR type takes more trips to Rome than the average.
- CR offers additional focused opportunities to meet the needs of your (potential) guests.

## Appendix: Information about quality measures and validation of our Consumer Panel data

➤ The entire process of collection and interpretation of data – including support of the participants of the household panels, the data entry system, the production method, the tools which are used, the reporting activities within the marketing department such as data analysis and reporting - is analysed and constantly improved, with the aim to provide you with the best possible quality of data.

➤ Our quality management includes:

- a) marking figures with low sample size;
- b) plausibility checks and corrections based on regular data checks
- c) validation by means of external benchmarks as well as historical data

➤

a) Marking figures with low sample sizes:

➤ In the GfK Consumer Panel, we collect and analyse purchases made by German private households. Many of our long-standing customers use our results as a basis for a better understanding of their customers, for business decisions and for the improvement of their market position. It is therefore important to realize, that the reliability of the results depends on the number of cases these results are based on. To make sure that analysis based on low case numbers will not lead to misinterpretation in your business, we will mark data based on less than 50 consumers and less than 100 cases as follows: “these data can only be interpreted to a limited extent, due to low case numbers, which may lead to considerable random fluctuations”.

b) Plausibility checks and corrections based on regular data checks:

- The raw data will be examined carefully and will be corrected according to established procedure. This includes:
  - - correcting prices and quantities deleting implausible or incomplete data sets
  - - checking and correcting outliers (for example adjustment in prices, based on expert knowledge)
  - - adjusting implausible or incomplete data sets according to frequency distribution
  - - checking and correcting plausibility (for example to match discount brands with the appropriate discount shop)
  - - validating current results according to existing historical data
  - - comparing statistical projection and raw data for fine adjustment of the reports

c) Validation by means of external benchmarks as well as existing historical data

➤ In the GfK Consumer Panel, participants report their purchases. Although generally samples are large, low case numbers may result in fluctuations for specific categories, where consumers purchase less frequently in short observation periods (for example a quarter).

➤ To provide the best possible picture of the market, we use existing and reliable external benchmarks to validate the results of the GfK Consumer Panel.

➤ These include for example:

- - comparing benchmark data and, if necessary, adapting to developments of the GfK Retail Panel, the Federal Statistical Office, customer data, ex-factories, statistics of specialist associations etc. by making use of adjustment factors
- - adjusting gaps in coverage by using standardized factors and, if necessary, aggregating monitored time periods (for example MAT)
- - validating and adapting the structure of households which already report online to the actual level of internet usage
- - using adjustment factors to compensate undercoverage or overcoverage of the panel, as identified in the past by using external benchmarks

Thank you very much for your attention!



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