

RE-START BERLIN.

7-point plan for consolidating and developing tourism from 2021/2022 onward.

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Senate Department
for Economics, Energy
and Public Enterprises

BERLIN



INTRODUCTION

The state of [Berlin's Tourism Plan 2018+](#) was adopted by the Senate in the spring of that year. At that time, tourism in Berlin was on the upswing as one of the city's most important economic factors, with growth and visitor figures increasing year on year, and no downward trend in sight.

„THIS CRISIS POSES CHALLENGES, BUT NONETHELESS PROVIDES AN OPPORTUNITY TO CONTINUE THE REORIENTATION OF TOURISM.“

The situation changed when the COVID-19 pandemic began in March 2020. Since then, tourism around the world and therefore also in Berlin has been in a severe crisis. This crisis poses challenges, but nonetheless provides an opportunity to continue the reorientation of tourism that was initiated with the Berlin Tourism Plan 2018+ under different conditions. More than ever before, it is important for all tourism stakeholders in Berlin to join forces. Even though a slight revival in the tourism and conference industry in 2021 can be cautiously forecast, it will still take some time before Berlin can regain the success of previous years.

This means that in the short term, it is important to accompany the return of the tourism and conference industry – as soon as the infection figures allow it – with measures to stimulate the economy and position the city among its competitors in Germany and Europe as a safe, open, innovative and enjoyable destination. This will provide targeted support for tourism as an important generator of jobs and revenue for the city.

At the same time, it is important to define the medium and long-term orientation of the tourism policy. Studies on expected travel behaviour after the pandemic show that sustainability will be a central issue for travel decisions in the future. The overriding goal therefore remains – as enshrined in the Berlin Tourism Plan 2018+ – the development of city-friendly and sustainable tourism that takes account of both the quality of the experience for visitors and the quality of life of Berliners.



AIMS AND STRUCTURE OF THIS PAPER

The Berlin Tourism Plan 2018+ continues to form the strategic basis of the city's tourism policy. However, some of the tasks in it have been reviewed due to the altered circumstances and their timelines and content adjusted or prioritised.

To this end, the Senate Department for Economics, Energy and Public Enterprises has developed a **7-point plan**. This plan shows the requirements for action in strategic tourism development for the next twelve to eighteen months that have arisen due to the COVID-19 pandemic.

Some of the aspects were already included in the tourism plan, such as the expansion of quality tourism through appropriate destination marketing, new forms of monitoring and data use, as well as the participation of the local community. These points are prioritised and detailed in the 7-point paper.

Other aspects, such as access for the tourism and conference industry to funding and training programmes, measures for digitisation and promotion of innovation in the industry, as well as measures to increase safety in the pandemic, were added as a result of the current events.

„THE 7-POINT PLAN SHOWS THE REQUIREMENTS FOR ACTION.“

THE FOLLOWING SEVEN POINTS WERE ELABORATED AND BACKED UP WITH MEASURES



PANDEMIC SAFETY



Visitors are put off by uncertainty - and this hurdle is especially difficult for city destinations during the COVID-19 pandemic. Berlin must present itself as an attractive destination with high-tech standards of hygiene in a modern and future-oriented manner. The standards and processes must be clearly and proactively communicated to potential and actual visitors to Berlin, as well as to industry partners inside and outside of the city. Employees of tourism-based businesses must be given the appropriate training.

In recent months, the tourism industry has made considerable efforts to develop and implement new hygiene standards. The task now is to optimise these standards according to the knowledge that is gained. This can be done using concepts that have already been developed by the industry. Dialogue to promote best practice should be increasingly supported in the future.

In addition, transparency about the current situation must be guaranteed for visitors at all times. This means that communication with visitors and tourism service providers during both relaxed and more difficult periods such as lockdowns must be guaranteed at the state and borough level. Chains of action along the entire spectrum of tourism services must be defined and coordinated with politicians and tourism service providers for the event of sudden waves of infection.



OBJECTIVES

- **Providing certainty**
on pandemic situations through protective measures
- **Consolidating Berlin's profile**
as a safe and reliable travel and conference destination
(e.g. the [Hygiene Framework Concept](#) of MICE Destination Berlin)
- **Communicating rules**
of conduct to visitors and to the tourism and MICE industry
(e.g. the awareness-raising initiative)

QUALITY TOURISM AND DESTINATION MARKETING

2

The Berlin Tourism Plan 2018+ defined quality tourism as a strategic guideline. However, due to the increased importance of the topic and with a view to the future after the pandemic, greater operational utilisation is required in order to generate long-term growth in quality tourism in the city. This requires a clear definition of what is meant by quality tourism with regard to compatibility with the city. From this we must then derive goals, indicators, instruments and approaches for action. It is crucial to focus and expand on addressing target groups in destination marketing in terms of quality tourism. This explicitly does not mean neglecting other visitors.

In the context of quality tourism, not only the communication and demand aspects need to be taken into account, but also supply - from both public and private providers - as well as the product format. Berlin marketing aimed at target groups and topics should be focussed, as well as adapted to the new

circumstances (for example changes in consumer and travel habits after the pandemic), and it should also take into account the city's diversity of offerings. This includes not only promoting what is already available, but also, as agreed in the Berlin Tourism Plan 2018+, identifying the potential in all twelve boroughs and developing tourism offers and products together with tourism service providers and the business development departments and tourism associations of the boroughs. Previous cooperation between *visitBerlin* and the boroughs has already created a basis for identifying potential.

In order for Berlin to be positively perceived and for tourism to be accepted by its residents, it is also essential that the city presents itself as a safe and clean place to visit. Measures to this effect (such as safety concepts, public toilets and projects to keep the city tidy) are already laid out in the State of Berlin's Tourism Plan 2018+ and will continue to be pursued.



OBJECTIVES

- **Defining what the term quality tourism means** for Berlin and using it in tourism marketing with measures to be specified in detail
- **Identifying and marketing tourist potential** in all twelve boroughs with the aim of using synergies between stakeholders and ensuring sustainable growth for Berlin that is of high quality and is compatible with the city

MONITORING AND DATA USE

3

In order to better understand the development of tourism in Berlin so that the infrastructure can be modified in a more targeted manner, data has been collected on tourists (for example with the online market research tool [Visitor Insight](#)) and on the use of infrastructure facilities in the city. To measure the level of acceptance among the local public, the [opinions of Berliners](#) on tourism are also regularly surveyed.



OBJECTIVES

- **Realigning monitoring of tourism**
in view of changing consumer and travel habits, making use of digital options and interfaces (big data, structural data, visitor flow analyses etc.)
- **Reusing data for digitisation projects,**
cross-company cooperation on a regional and national level, for example with Technologiestiftung Berlin

Due to the COVID-19 pandemic, additional data is needed that describes how consumer and travel habits have changed (for example trends and new developments, altered use of mobility for travelling to and within Berlin, thematic interests, activities in Berlin, use of public spaces, booking and information habits, safety requirements) so that communication and products can be adapted in a targeted way. Because general statements on tourism from market research before the pandemic are no longer valid, market data must be acquired more quickly and in a manner more specific to Berlin.

Access to this market knowledge and current developments is also important for tourism businesses and should be made available to stakeholders.

Data is also indispensable as a basis for making decisions on strategic action and for monitoring the effectiveness of targets set for areas such as visitor guidance, city-friendliness, safety and marketing. In public spaces, the pandemic means that it is important to avoid overcrowded places and use targeted communication to offer visitors alternative places to go – including those that are off the beaten track. This means that information on highly frequented places has to be quickly available; ideally in real time. For indoor spaces, such as tourist attractions, museums and event venues, it is also important to manage visitor flows to prevent congestion and concentration at venues and other sites (often in the city centre).

4

ACCESS FOR THE TOURISM INDUSTRY TO FUNDING AND TRAINING PROGRAMMES

The collapse in global tourism caused by the COVID-19 pandemic has had huge effects on Berlin's economy. It is unclear whether tourism stakeholders and service providers will survive in their current numbers and variety, or whether the continued pandemic, and the resulting absence of visitors from important target markets, will lead to a thinning out. The state of Berlin, along with the federal government, has supported the tourism industry from the start in order to mitigate the effects of the pandemic. This included several emergency aid programmes, advertising and marketing campaigns to promote incoming tourism, and advisory and qualification measures for dealing with hygiene regulations as well as to promote digitisation. It appears that it will be necessary in the coming months to continue stabilising the industry with measures to boost the economy. As part of this, the economic development agencies of the boroughs are also providing local tourism stakeholders with a considerable amount of advice and support.

In the medium to long term, the sector should be given (better) access to the existing economic development instruments of the state of Berlin and be enabled to use them. One (funding) focus should be on supporting the industry's resilience, adaptability and capacity for innovation, as well as sustainable management to better equip it for future crises. Special support should also be given to sustainable tourist mobility and new formats for dialogue and networking between the tourism industry and companies from other sectors such as technology.

Finally, more support should be given to the hugely important tasks of qualifying and training skilled staff, as well as maintaining and expanding traineeships.



OBJECTIVES

- **Continuing to support the restart of tourism** and improving access to economic funding
- **Promoting and training skilled staff,** as well as preserving and expanding traineeships
- **Transferring knowledge** about tourism in Berlin (for example in the TourismHub)
- **Strengthening the ability of tourism businesses** to adapt and innovate in order to survive in a competitive environment, recognising changing conditions and tailoring their products and processes accordingly

DIGITISATION OF THE TOURISM INDUSTRY

5

The COVID-19 pandemic has played a major part in accelerating digitisation. Not only has it revealed the dependency on technical infrastructure and forced many companies to adapt, but it has also shown that many new challenges can be quickly and effectively solved by digitisation.

Consequently, digitisation offers a great opportunity for Berlin's tourism industry to stay competitive. It must exploit this opportunity as quickly as possible, for example by adapting tourist offers and products (such as contactless systems, time slot tickets, digital access management, indication of waiting times and use of artificial intelligence). Digital solutions, ideally supplied with suitable, often already existing data (see point 3 on monitoring and data use), can also support the spatial management of visitor flows as described in the Berlin Tourism Plan 2018+. In terms of best practice, there should be more dialogue on the approaches and solutions used in order to better exploit existing potential.



OBJECTIVE

- **Supporting the tourism industry in digitisation and innovation projects** (e.g. Digital Premium Berlin) in order to make it more resilient and sustainable against the competition, to adapt it to the current pandemic situation and to prepare it for a prospective increase in visitor numbers

SUPPORT FOR THE MEETINGS, INCENTIVES, CONFERENCES AND EXHIBITIONS INDUSTRY (MICE)

6

The MICE industry is still badly suffering the effects of the pandemic. To put on safe events, organisers and service providers must make greater use of space, personnel and budgetary resources. The [Congress Fund](#) is an instrument that is intended to counteract this.

For the foreseeable future, the conference market will be smaller than before the pandemic. Around the world, competition for the remaining events is intensifying. This makes it all the more important that Berlin presents itself more clearly as an innovative and sustainable conference destination (for example with [Sustainable Meetings Berlin](#)), attracts national and international trade and corporate events, and provides them with the best possible support. As well as tangible aspects such

as greater revenue, including tax revenue, it will reinforce Berlin's international reputation as a city of science and medicine as well as the "city of freedom".

For the MICE industry, not only Berlin's accessibility is essential, but also the need to preserve its diverse range of hotels, venues and event service providers. In order to maintain Berlin's leading position and remain among the top three destinations, it is highly important to retain this diversity and quality. In addition, there should be a stronger focus on congresses from the key groups of clients - the health industry, ICT, media & creative industries, transport, mobility and logistics, energy technology and optics - in order to make the most effective use of funds.



OBJECTIVES

- **Mitigating the impact of the pandemic** on Berlin's MICE industry
- **Continuing to present Berlin** as an innovative and sustainable MICE destination as envisaged in the Berlin Tourism Plan 2018+

RAISING THE PROFILE OF THE TOURISM AND CONFERENCE INDUSTRY AND BROADENING THE PARTICIPATION OF THE LOCAL COMMUNITY

7

The severe economic downturn since the start of the pandemic has made it clear that Berlin depends to a large degree on a functioning tourism and conference industry. This means there needs to be more communication to make the city's residents aware of the importance of this economic factor (shown by figures on the tourism and conference industry collected using the [Tourism Satellite Account TSA](#), for example).

At the same time, the importance of city-friendly and sustainable development of tourism during and after the pandemic must be emphasised. The community should be given the chance to talk about opportunities, risks, experiences and problems they have had in the past with tourist developments and overexploitation in their neighbourhoods and residential areas. The effects of the pandemic-related decline in visitor numbers in their immediate neighbourhoods should also be discussed. This should result in the development of project ideas for city-friendly tourism in Berlin during and after COVID.



OBJECTIVES

- **Communicating the importance of tourism** as an economic factor for Berlin
- **Involving the local community** in considerations for sustainable and city-friendly development of tourism during and after the pandemic



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