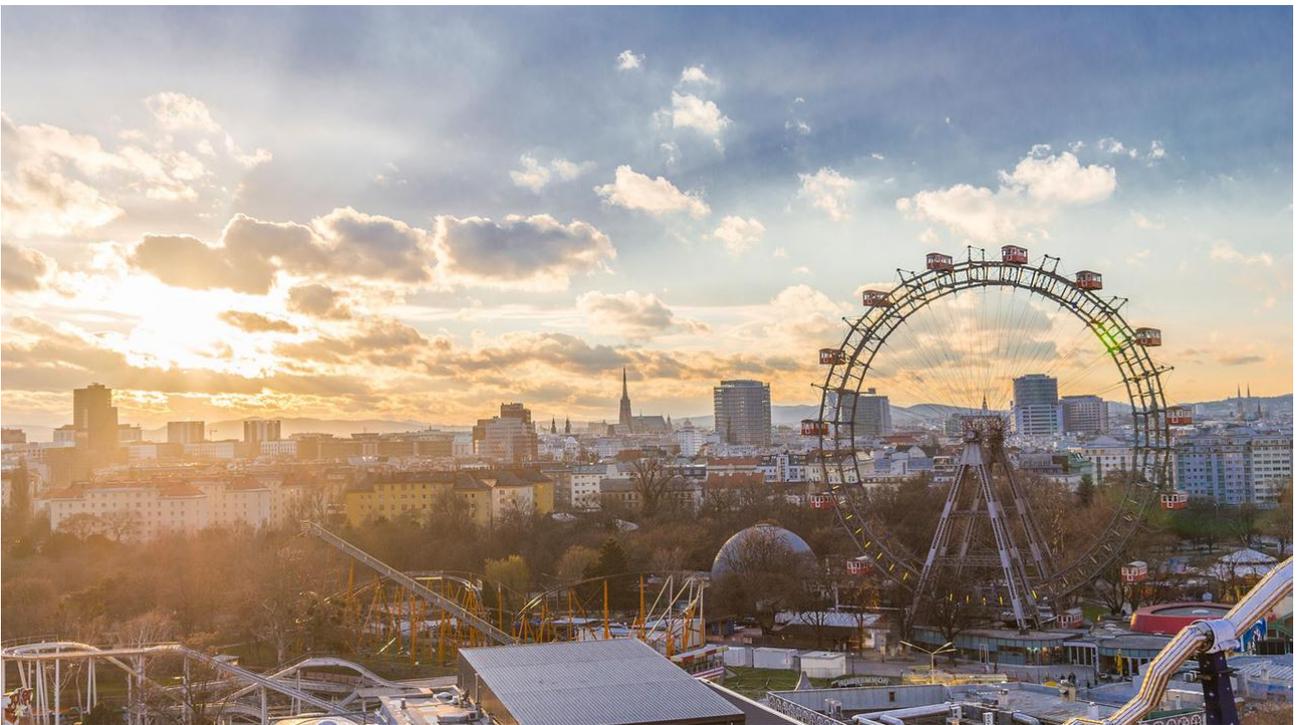


Vienna Tourist Board

DESTINATION MARKETING & DESTINATION MANAGEMENT
ORGANIZATION FOR VIENNA



OVERVIEW OF THE DUTIES AND FUNCTIONS OF THE VIENNA TOURIST BOARD

VIENNA

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1 Overview of the Vienna Tourist Board

The Vienna Tourist Board is the official destination marketing and management organization for the City of Vienna. Established in 1955, the board's mandate includes representing the tourist interests of the city, promoting the destination worldwide, assisting visitors with information and services, contributing to tourism measures instigated by the municipality, and promoting an understanding among local residents for the tourism industry and its economic, cultural and social significance.

1.1 LEADING THE WAY: PRESIDENT, TOURISM COMMISSION AND DIRECTOR

Peter Hanke, Executive City Councilor of Finance, Business, Digital Innovation and International Affairs, has been President of the Vienna Tourist Board since June 19, 2018, and Norbert Kettner has been managing director (director of tourism) since September 2007. The president is nominated by the Municipality of Vienna, and the managing director by the [tourism commission](#) (comparable to a supervisory board) on the president's recommendation. The tourism commission consists of the president, two vice-presidents, and 15 other members, most of whom are appointed by the municipality. It is responsible for the budget and for other basic matters.

1.2 VIENNA TOURIST BOARD: MARKETING AND SERVICE ON A NON-PROFIT BASIS

The Vienna Tourist Board is a non-profit organization and not a travel agency (Vienna has about a hundred incoming travel agencies). Its destination marketing is carried out in close cooperation with Vienna's tourist industry. The Board always operates in a subsidiary position: Its operations support and supplement – never replace – the marketing activities of Vienna's individual tourist and entertainment enterprises. Apart from international marketing in the 19 markets that generate more than 80% of bednights, the Vienna Tourist Board also offers an information and hotel reservation service for potential visitors to Vienna from all over the world through its "Vienna Hotels & Info" team. It looks after guests in Vienna from its central tourist information office behind the Vienna State Opera, welcome points at Central Station and Vienna International Airport as well as two mobile tourist infos. In addition, the Vienna Tourist Board is also involved in destination management in cooperation with stakeholders from various different areas with a view to further improving the city for visitors and local residents alike.

1.3 PRIMARY SOURCE OF REVENUE: LOCAL TAX

The budget for 2019 is 29.6 million euros. Of this, around 74% comes from a local accommodation tax which, under the City's Promotion of Tourism Act, amounts to 3.2% of net room rates. Another 4% comes from the city's general budget. The remainder is provided by the Vienna Chamber of Commerce and the Board's own revenues and reserves. Some 88% of the

budget is invested in destination marketing (campaigns, PR, sales promotion, production of advertising materials, and conference acquisition) as well as onsite activities in Vienna (visitor services, tourist information, destination management) and the teams involved in these activities. The Vienna Tourist Board employs a total of 137 people (123 fulltime equivalents), 79% of them women.

2 The Departments and Staff Units of the Vienna Tourist Board

The Vienna Tourist Board is organized in six departments and two staff units. The following paragraphs describe the responsibilities of the various sections.

2.1 DESTINATION MANAGEMENT: STRATEGIC DESTINATION DEVELOPMENT

Destination management means targeted promotion of local partner networking, including the target group of residents, and actively addressing the important strategic challenges that we face in city tourism in coming years. All the Vienna Tourist Board's activities undertaken in Vienna are consolidated in this department. This includes the areas of strategic destination development, containing [statistics and market research](#), training initiatives, and events for the Austrian and international travel industry. The "Vienna City Card" and Visitor Service with its tourist information offices fall under this department.

Market and trend research, statistics and forecasts, surveys of visitors and residents are handled by the department, as are development of the current [destination strategy](#), and organization of industry events such as the annual tourism conference. Through its "[Vienna Experts Club](#)" (currently with more than 900 members) the department offers free training programs for employees of Vienna hotels and incoming travel agencies to constantly expand their knowledge of Vienna as a tourism product. Complementing this is the "[Vienna Experts Club International](#)," a service and training program for the international travel industry to attract and retain multipliers and decision makers. The International Club currently counts around 19,500 members in about 80 different countries. The "[Vienna City Card](#)," the Vienna Tourist Board's official visitor card, offers more than 200 price discounts for visitors to Vienna as well as free travel on Vienna public transport. Additionally, tickets to the airport and for hop-on, hop-off tours can be included. It is available either as a card with a coupon booklet or via the app.

The [Vienna Tourist Board's visitor services](#) range from providing information and hotel reservations to handling complaints. Every year about a million visitors take advantage of the services provided by the board by telephone, email and mail to the "Vienna Hotels & Info" team and in person at the various tourist information offices. At the central tourist information office on Albertinaplatz, visitors can obtain information in person as well as brochures in 17 different languages, whilst a commercial partner sells tickets for cultural events and sightseeing tours. The

Vienna Tourist Board's information counters at Central Station and Vienna International Airport are also open every day. During the warmer months of the year, there are also two mobile tourist information units – Vienna-branded delivery bikes – supplying visitors and residents alike with tips about neighborhoods outside the first district.

2.2 BRAND MANAGEMENT & B2C MARKETING: INTERNATIONAL PRESENCE OF THE DESTINATION

The “Brand Management & B2C Marketing” department is responsible for strategic and operational management of Vienna as a tourism brand as well as for developing and implementing the Tourist Board's corporate identity. The department also plans and realizes integrated, innovative B2C campaigns for the international travel market using a contemporary communications mix. The department furthermore handles production of printing material, produces giveaways, and implements collaborative campaigns with strategic partners.

The strategic orientation of digital communications and use of social media channels and microsites also fall under the purview of this department. One area of particular focus is the conception and implementation of innovative content production. The team is also responsible for central [image](#) and [video management](#) and running the image database with around 1,000 themes. Furthermore, the department handles production of all the Vienna Tourist Board's [advertising and information materials](#): some 200 brochures, leaflets, posters, etc. every year in 17 different languages, as well as giveaways ranging from city bags and espresso cups to aprons. Advertising sales are an important factor in the production of information materials, generating revenues that significantly reduce the production costs of many publications (such as the city map in 13 languages, with a print run of around 4 million a year).

In 2016 a new [brand strategy](#) was developed together with the Nymphenburg/Munich Group based on insights gained from neuromarketing. The brand core “Encouraging Enjoyment” was defined as a new brand essence, and – based on a comprehensive analysis of the target group – five brand assets of decisive importance to the success of Vienna's tourism brand were identified. The strongest of these is Vienna's imperial heritage, followed by its music and cultural attractions, its culinary culture, the aspects of Vienna being a modern, livable metropolis and its healthy balance of urban ambience and green spaces. The advertising line developed jointly with the advertising agencies Seite zwei – Branding & Design and WIEN NORD and implemented worldwide by the Vienna Tourist Board since October 2016 is also based on these modules.

2.3 MEDIA HOUSE: MEDIA VIENNA EXPERIENCE FROM THEME CURATION TO MEDIA RELATIONS

The Media House department is responsible for identifying themes and creating content for Vienna's image as a tourism destination as well as for curating the analog and digital Vienna

experience. International positioning of the Vienna experience in market-relevant media, channels and formats is secured through cooperation with international representatives and multipliers.

The staff of the content team research, curate and create content about high-quality offerings of relevance to tourism for the various channels of the Vienna Tourist Board. These include the B2C online presence vienna.info, which is available in 13 languages, the electronic B2C newsletter, and the [event database](#) updated daily, as well as the [Vienna Journal](#), published annually in eight languages, other print productions, and the Vienna program, printed monthly.

The department's media relations managers are the contacts for international media and also host around 1,000 international media representatives a year, whom the Vienna Tourist Board invites to Vienna and assists with their research. In this way, journalists from print and online media as well as radio, TV and film teams and influencers receive efficient support with their research and film work. New topics and offerings in Vienna are presented in visitors' home markets at around 60 press events each year and through regular press releases. The media team also provides access to extensive research texts on a wide variety of themes ranging from architecture to Viennese wine. The result of this intensive media work is up to 3,000 documented reports on Vienna initiated by the Vienna Tourist Board in print and online media, radio and TV all over the world.

2.4 MARKET MANAGEMENT: COOPERATION WITH THE INTERNATIONAL TRAVEL INDUSTRY

The Market Management department is responsible for Vienna's presence in the offerings of the international travel industry. To this end, the team makes around 100 business trips all over the world every year. Team members represent Vienna at trade fairs and shows, workshops for the travel industry, and special presentations, and organizes participation of Vienna Tourist Board partners at these events. In Vienna, they assist the 1.000 or so representatives from the international travel industry. Key topics are the luxury travel segment, LGBT marketing, and air service development.

Since Vienna's success as a business location, tourist and congress destination also depends on its being accessible by air, in April 2016 the Vienna Tourist Board and Vienna International Airport signed a growth agreement entitled "Air Service Development Vienna." The aim is to bring additional airlines to Vienna, promote direct flights, and convince decision makers of Vienna's advantages as a central European transportation hub. The "Market Management" department is responsible for cooperation with airlines and for conducting campaigns related to air service development, and for airline marketing.

2.5 VIENNA CONVENTION BUREAU: SUCCES WITH LONGTERM ACQUISITION

The Vienna Convention Bureau of the Vienna Tourist Board acquires congresses, corporate conventions and incentives worldwide. Founded in 1969, it is supported by the City of Vienna and the Vienna Economic Chamber. In 2018 4,685 congresses and meetings in Vienna generated 1.9 million bednights and value-added of about 1.2 billion euros. According to the current rankings of the International Congress and Convention Association ICCA (2nd place) and of the Union of International Associations UIA (4th place), Vienna is one of the world's top meeting destinations.

In this area too, the Vienna Tourist Board operates on a non-profit basis. Its successes benefit all players of Vienna's meeting industry, particularly the city's congress centers and hotels as well as universities, event venues and agencies. The Vienna Convention Bureau provides detailed information about the meeting destination Vienna on the website www.vienna.convention.at. Furthermore, it publishes the annual Meetings Industry Report as well as the brochure "Meeting in Vienna" which offers a summary description of Vienna's assets for conference organizers in five languages.

2.6 CORPORATE PUBLIC RELATIONS: THE INSTITUTION IN THE PUBLIC EYE

Corporate Public Relations is the executive department responsible for the way in which the Vienna Tourist Board is perceived by the general public. The department's task is to inform journalists, industry representatives and local residents of Vienna about the activities of the Vienna Tourist Board as well as tourist developments in the city with an emphasis on the economic, cultural and social significance of tourism. In regular press releases and press conferences as well as in its monthly "industry newsletter", the Corporate PR team reports on the latest tourist figures, marketing highlights, congress acquisitions and trade events. The department is also charged with handling media requests, producing the [annual report](#), writing articles for trade publications as well as editing the B2B website (b2b.vienna.info).

2.7 BUSINESS DEVELOPMENT & STRATEGIC PARTNERSHIPS: COLLABORATIONS & NETWORKING

The Business Development & Strategic Partnerships staff unit consolidates and bundles the crossdepartmental agendas of the Vienna Tourist Board. This includes mainly tourism policy – local, national and international – and business development in the form of new partnerships and collaborations. Through active collaboration with local and international players both within and outside the tourism industry, this department has primarily coordinating functions – for example within the scope of tourism policy in cooperation with departments of the City of Vienna, the Austria National Tourist Office and the provincial tourism organizations, consortium towns and the Federal Ministry for Sustainability and Tourism. The section also advises and supports the departments in the implementation of new technologies, thus expediting the digitization of the organization.

2.8 COMMERCIAL SERVICES: ORGANIZATIONAL BACKBONE OF THE VIENNA TOURIST BOARD

As the backbone of the organization, the Commercial Services department is responsible for a wide range of areas, from HR, controlling and accounts, to organizational development. IT, logistics and facility management are also the responsibility of this department. The goal of the department is frictionless processes tailored to the needs of the users, powered by digitization and automation.

3 The Vienna Tourism Industry and its Economic Importance

Vienna is one of Europe’s most successful city tourism destinations. For many years now, the greater Vienna area (City of Vienna plus surrounding communities) has been ranked amongst the top 10 cities in Europe in the annual “European Cities Marketing” benchmarking report. In 2017 (comparative figures for 2018 are not yet available) the greater Vienna area logged up around 16.5 million bednights. In 2018 Vienna recorded around 16.5 million bednights for the core area within the city limits alone: over 82% of these were attributable to foreign visitors, with 7.5 million arrivals. According to economic surveys, the annual value-added generated by tourism in the core Vienna area (direct and indirect benefits) amounts to some 3.97 billion euros. This represents approximately 4.2% of Vienna’s gross regional product, and some 12.1% of tourist value-added for the whole of Austria. Tourism creates about 90,000 jobs in Vienna. The cultural metropolis Vienna offers residents and visitors alike the world famous Vienna Philharmonic Orchestra, four opera houses, two imperial palaces, around 50 theatres and more than a hundred museums. The population supports tourism in Vienna: 94% of Viennese have a positive attitude towards tourism, as shown by a representative survey carried out by the Vienna Tourist Board (3,650 respondents in the year 2018).

Visitors to Vienna (core area) come from all parts of the world. The most important countries of origin are listed below together with the percentage of total bednights accounted for by each in the year 2018.

Germany	19%
Austria	18%
USA	6%
United Kingdom	5%
Italy	5%
Spain	3%
China	3%
France	3%
Russia	3%
Switzerland	3%

Sources:

MA 6 – Dezernat Statistik Wien, ECM Benchmarking Report 2017-18, TSA – Statistik Austria, WIFO

3.1 WHAT SURVEYS AND STATISTICS TELL US ABOUT THE “AVERAGE GUEST”

According to visitor surveys (2017/2018), the average visitor is 44 years old, is very well educated, and is either an employee or self-employed. He or she travels with a partner, and generally without children. 39% of the city's guests are visiting Vienna for the first time, and 35% of them have already been here more than twice. The main reasons given for visiting Vienna are above all its art and culture, the city's sights, its beauty and architecture, its history and diversity of tourist offerings, as well as its atmosphere and flair. 42% of visitors travel to Vienna by air, 27% by car, while 19% travel by train and 9% by bus. A small number of visitors uses other means of transport ranging from rental cars to yachts and bicycles. The cycle path along the Danube from Passau to Vienna is regarded as one of Europe's finest cycling routes, and yacht owners arriving in Vienna from Western Europe via the Rhine-Main-Danube Canal find a well-equipped marina in the Danube metropolis. What do visitors to Vienna do? The list is topped by sightseeing, followed by visiting museums and exhibitions, dining at restaurants, walking through the city, going on a shopping spree, and frequenting a coffeehouse.

3.2 FROM LUXURY HOTEL TO SIMPLE GUESTHOUSE: 68,000 BEDS

Vienna offers a wide range of overnight accommodation, from palaces and international hotel chains to family-run establishments. The Palais Württemberg for example has become the *****Imperial Hotel, the palace of Archduke Leopold Salvator is now the ****Hotel Schloss Wilhelminenberg. The international chains include familiar names such as The Ritz-Carlton, Park Hyatt, InterContinental, Hilton, Kempinski, Marriott, Le Méridien, Radisson, Renaissance, Mercure, Holiday Inn or nh; the Austrian chains range from Austria Trend Hotels to family-run hotels such as the *****Hotel Sacher, the ****Stefanie and the ****Altstadt Vienna. Of the 68,000 beds in around 430 hotels and guesthouses (including seasonal hotels open only in summer), well over half are in the luxury or first-class category. In 2018, the average length of stay was 2.2 nights, and average bed occupancy 60,2%. This is equivalent to a room occupancy (not measured in Austria) of around 85%. Vienna has the highest bed occupancy rate in all Austria.

3.3 CONGRESSES, CORPORATE CONVENTIONS, INCENTIVES

Congresses, corporate conventions and incentives are an important part of Vienna's tourism business. 12% of all Vienna visitor overnights Vienna's convention statistics for 2018 count 4,685 national and international congresses and corporate events with a total of 631,000 participants and 1,925,000 overnights. The meetings industry is the main source of revenue for the city's tourist industry. Participants of congresses generate significantly higher revenues than leisure

tourists. With a daily outlay of 541 euros, the average congress guest spends more than twice as much as other visitors to the city (266 euros).

The excellent meeting infrastructure, high service standards of meeting service providers (PCOs, caterers, interpreters, etc.) and the cultural attractiveness of the city all help make Vienna one of the top destinations for international congresses and meetings. The statistics published by the two leading organizations ICCA (International Congress and Convention Association) and UIA (Union of International Associations) regularly show Vienna in a top position among cities around the world. The latest international congress totals confirmed by ICCA for 2018 saw Vienna claim second place. With a total of 172 events, the Austrian capital ranked only behind Paris (212) and ahead of third-placed Madrid (165). In 2017, the statistics published by the UIA placed Vienna fourth, with 488 international congresses, behind Singapore (802), Brussels (757), and Seoul (639).

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