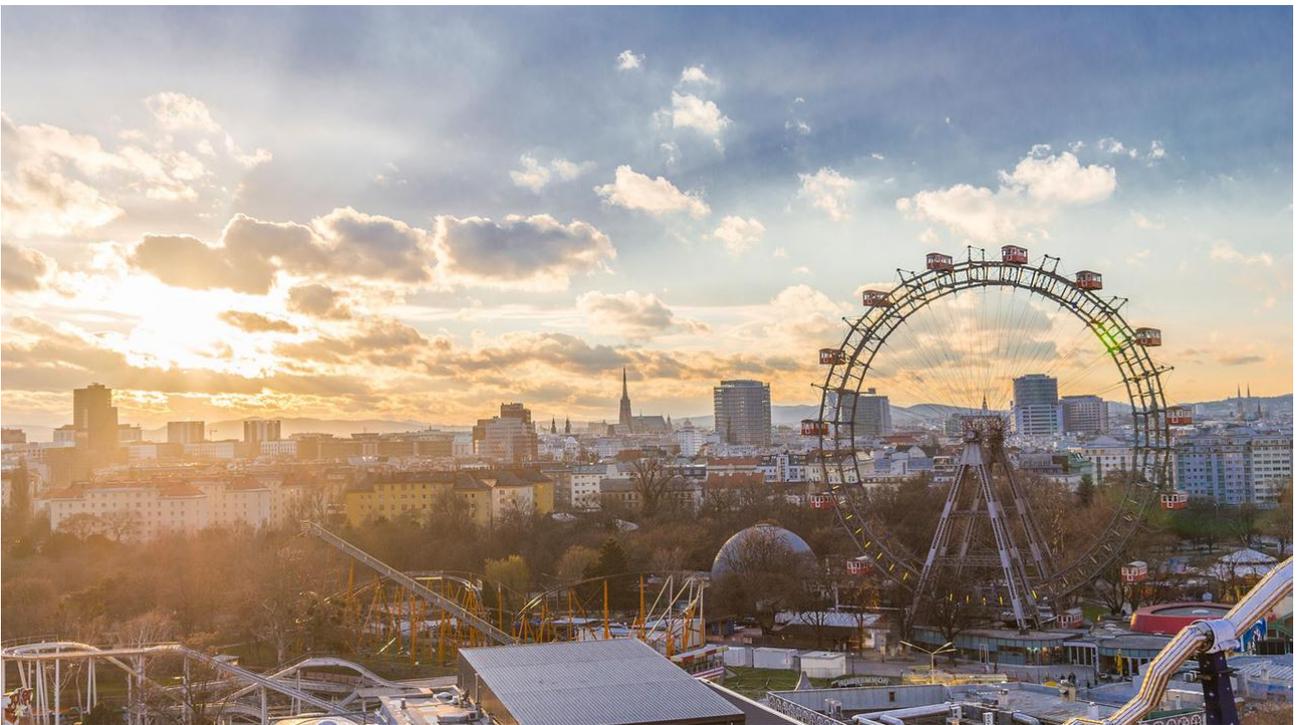


Vienna Tourist Board

DESTINATION MARKETING & DESTINATION MANAGEMENT
ORGANIZATION FOR VIENNA



OVERVIEW OF THE DUTIES AND FUNCTIONS OF THE VIENNA TOURIST BOARD AS WELL AS THE
ECONOMIC IMPORTANCE OF THE VISITOR ECONOMY FOR 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 private visitors and meeting participants 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 MARKETING AND SERVICE ON A NON-PROFIT BASIS

The Vienna Tourist Board's Destination Marketing department specifically targets those groups which make the greatest contributions towards achieving the goals set out in the Visitor Economy Strategy. The Vienna Tourist Board will continue to actively develop all 17 of its established focus markets (Germany, Austria, Switzerland, the USA, the United Kingdom, Italy, Spain, France, Russia, China, Japan, South Korea, Arabic countries, Canada, Australia, Brazil and India) in 2021, while also prioritizing six nearby markets (Belgium and the Netherlands for the meetings industry in particular, as well as the Czech Republic, Hungary, Poland and Romania) with the potential to generate bednights quickly once the pandemic starts to subside. The Vienna Tourist Board and its teams help meeting organizers plan and prepare meetings and incentives in Vienna and offer information and hotel booking services for international travelers. It provides visitor services in Vienna from its main tourist information center behind the Vienna State Opera, welcome points at Hauptbahnhof (Vienna Main Station) and Vienna International Airport, as well as four mobile tourist info points. In addition, the Vienna Tourist Board is involved in destination management activities in cooperation with stakeholders from various areas with a view to further improving the city for visitors and local residents alike.

1.2 LEADING THE WAY: PRESIDENT, TOURISM COMMISSION AND DIRECTOR OF TOURISM

Peter Hanke, Executive City Councilor of Finance, Business, Labour, International Affairs and Vienna Public Utilities, has been President of the Vienna Tourist Board since June 19, 2018. Norbert Kettner was appointed Managing Director (Director of Tourism) in September 2007. The President is nominated by the Vienna city government, and the Managing Director by the [Tourism Commission](#) (the 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 essential matters.

1.3 PRIMARY SOURCE OF REVENUE: LOCAL TAX

The budget for 2021 is EUR 25.8 million. Before the pandemic, around 85% of the total came from a local accommodation tax of 3.2% of net room rates, levied under Vienna's Promotion of Tourism Act. The share of the budget attributable to this local tax in 2021 was 50%. Another 26%

comes from the city's general budget. The remainder is provided by the Vienna Economic Chamber and the board's own revenues and reserves. Some 87% of the budget is invested in destination marketing activities (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 staff involved in these activities.

2 The Vienna Tourism Industry and its Economic Importance

The coronavirus crisis has left a mark on every aspect of global tourism, with cities harder hit than rural areas. Owing to their increasingly international make-up and booming business, congress and cultural tourism, cities had been a main driver of global tourism up until the outbreak of the pandemic and were experiencing stronger growth than other industries as a result. As such, these factors should also be responsible for the sector's gradual recovery after the crisis.

In the twenty years prior to the pandemic, the increase in bednights in Vienna was more than three times higher than it was for the rest of Austria (34%), at 129%. In a comparison with its international peers, Vienna was among the most successful destinations for city tourism in Europe before the pandemic: for many years, the greater Vienna area (City of Vienna plus surrounding municipalities) has been ranked amongst the top 10 cities in Europe in the annual European Cities Marketing benchmarking report. In 2019 the greater Vienna area recorded around 18.6 million bednights. This included [around 17.6 million bednights for the core area](#) within the city limits alone: over 83% of these were attributable to foreign visitors, who accounted for 7.9 million arrivals. As a result, net revenue generated by Vienna's hotel industry surpassed the EUR 1 billion mark the first time in 2019 (EUR 1.02bn).

But the picture was very different in 2020: between January and December, Vienna reported a total of [4.6 million visitor overnights](#), which represented a 73.9% decline on the record set a year earlier. The pandemic caused a 76.6% decline in net revenue to EUR 239 million.

Economic studies show that the annual induced economic impact usually generated by tourism in the core Vienna area (direct and indirect benefits) amounts to some EUR 3.97 billion. This represents approximately 4.2% of Vienna's gross regional product, and some 12.1% of the induced economic impact from tourism for the whole of Austria. According to the Austrian Institute of Economic Research (WIFO), Covid-19 cost Vienna's tourism industry somewhere in the region of EUR 2.8 billion in terms of lost induced economic impact in 2020.

Under normal circumstances, tourism is an important source of jobs for Vienna: according to the Statistics Austria Tourism Satellite Account (TSA) and the Austrian Institute of Economic Research Vienna (WIFO), in good times Vienna's tourism and leisure industry sustains around 116,500 jobs. The WIFO estimates that at least 35,000 jobs were lost in 2020 due to Covid-19.

The ongoing representative survey conducted by the Vienna Tourist Board on local residents’ attitudes to tourism shows that locals are overwhelmingly supportive of tourism – with 9 out of 10 people living in Vienna seeing tourism as positive for the city (3,670 respondents in 2020).

In 2019, 83% of overnight stays were accounted for by visitors from abroad, with European countries behind 59% of the overall total and Asia and North America (primarily USA) contributing 13% and 9% respectively. By March 2020, the majority of overnight stays were attributable to nearby markets. The most important markets before the crisis (2019) and during the pandemic (2020) were measured in terms of total overnights:

#	2019		2020	
1	Germany	19%	Austria	28%
2	Austria	17%	Germany	22%
3	USA	6%	Italy	4%
4	Italy	5%	United Kingdom	3%
5	United Kingdom	4%	France	3%
6	Spain	4%	USA	3%
7	China	3%	Spain	3%
8	France	3%	Switzerland	3%
9	Russia	3%	Poland	2%
10	Switzerland	3%	Russia	2%

Sources: City of Vienna Municipal Department 6 – Accounting Services, Duties and Charges &Municipal Department 23 – Economy, Labor and Statistics, ECM Benchmarking Report, TSA – Statistics Austria/WIFO

2.1 VISITOR ECONOMY STRATEGY: ADDING VALUE FOR THE CITY

The Vienna Tourist Board presented its [Visitor Economy Strategy](#) in fall 2019. Inspired by the motto of Shaping Vienna, the new strategy completely redefines travel as a phenomenon and its effect on the destination, while targeting sustainable development and balancing the needs of both residents and visitors. The emphasis is on adding value for the city, its residents and businesses. While the fundamental strategy remains unchanged, the targets set have been adjusted to reflect the shift in demand and change in circumstances triggered by the coronavirus crisis. The focus is on economic, environmental and social sustainability and resilience – in other words, the destination’s ability to learn from and withstand crises.

2.2 WHAT SURVEYS AND STATISTICS TELL US ABOUT THE “AVERAGE VISITOR”

According to the [2018/2019 Visitor Survey](#) (around 4,000 respondents), the typical visitor to Vienna is 46.3 years old, a salaried employee, well educated, and travels by plane, usually with one other person. Just under half of guests (46%) were visiting for the first time, around a third (30%)

had already been to Vienna once before and around a quarter (24%) were returning to Vienna for at least the third time. 74% of visitors named sights and culture as one of the reasons for choosing the destination. 45% of visitors travel to Vienna by air, 21% by car, while 23% travel by train and 8% by bus. A small number of visitors reached the city by another means of transportation – with alternatives ranging from motorhomes to yachts and bicycles. What do visitors to Vienna do? The list is topped by sightseeing, followed by walking through the city, dining at restaurants, visiting museums and exhibitions, and going to coffeehouses.

2.3 FROM LUXURY HOTELS TO SIMPLE PENSIONS: 69,000 BEDS

Vienna offers a wide range of overnight accommodation, from palaces and international hotel chains to family-run establishments. Palais Württemberg for example has become the 5-star superior Hotel Imperial, and the palace of Archduke Leopold Salvator is now the 4-star Austria Trend 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 5-star superior Hotel Sacher, the 4-star Hotel Stefanie and the 4-star Altstadt Vienna. Of the approximately 69,000 beds in around 411 hotels and pensions (including seasonal hotels open only in summer), well over half are in the luxury or premium 4- and 5-star category. In what was an exceptional year in 2020, the average length of stay was 2.3 nights (2019: 2.2 nights), and average bed occupancy 22% (2019: about 62%). This is equivalent to a room occupancy of around 29% (2019: about 80%). Before the coronavirus pandemic Vienna had the highest bed occupancy rate in Austria.

2.4 MEETINGS, CONGRESSES, INCENTIVES

Congresses, corporate meetings and incentives are an important part of Vienna's tourism industry. An analysis of the long term average reveals that this segment accounted for one in eight overnight stays. According to Vienna's [2019 Meetings Industry Report](#), in 2019 there were 5,490 national and international congresses and corporate events with a total of 606,666 participants and 1,581,000 overnights. The meeting industry is the main source of revenue for the city's visitor economy. Congress participants generate significantly higher revenues than leisure tourists. With a daily outlay of EUR 541, the average congress guest spends more than twice as much as other visitors to the city whose daily spend amounted to EUR 276 (2019 totals, pre-pandemic).

The city's outstanding meeting infrastructure, the high service standards of meeting service providers (PCOs, caterers, interpreters, etc.) and its cultural appeal all help make Vienna one of the top destinations for international congresses and meetings. The statistics published by the two leading organizations – the International Congress and Convention Association (ICCA) and the Union of International Associations (UIA) – regularly show Vienna in a top position among cities around the world. The latest international congress totals confirmed by ICCA for 2019 saw Vienna

claim sixth place with 149 events. Places 1-5 were occupied by Paris (237 international congresses), Lisbon (190), Berlin (176), Barcelona (156) and Madrid (154). The UIA, which uses different statistical criteria, ranked Vienna fourth in 2019 with 306 international congresses, behind Singapore (1,116), Brussels (961), Seoul (579) and Paris (375).

3 The Departments of the Vienna Tourist Board

The Vienna Tourist Board is organized into five departments and one staff unit. The following paragraphs describe the responsibilities of these permanent entities. The Vienna Tourist Board also makes use of interdepartmental task forces to ensure that the different departments can pool their resources to meet new challenges and respond quickly to changing circumstances.

3.1 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 city tourism will face over the coming years.

This department is responsible for the development of the current [Destination Strategy](#), market and trend research, statistics and forecasts as well as visitor and resident surveys. The scope of the department's responsibilities also extends to the organization of industry events such as the annual [Tourism Conference](#), and training initiatives such as the [Vienna Experts Club](#). The club's members, primarily consisting of employees of hotels in Vienna and incoming travel agencies, are given free training on Vienna as a tourism product. The department's Industry Services team is the central point of contact for Vienna's tourist industry, and accommodation providers in particular.

Ongoing development of the [Vienna City Card](#), the Vienna Tourist Board's official visitor card, as well as its "sister" ticket, the [Vienna City Card Experience Edition](#) for locals and regular visitors, also falls under this department's remit. The Vienna City Card entitles holders to numerous discounts well as to unlimited travel on the Wiener Linien public transportation network. It is also available with add-ons, including transfer to and from the airport and hop-on hop-off bus tours. The Vienna City Card Experience Edition gives holders access to a range of unusual and exclusive Vienna experiences for a full year, as well as discounts of 20% from participating hospitality partners in the city.

The task of the [Vienna Tourist Board's visitor services](#) (assigned to this department) range from providing information and making hotel reservations to handling complaints. Before the pandemic, around 850,000 visitors took advantage of these services each year via multiple

channels: by telephone, email and social media via the Vienna Hotels & Info team and in person at the various tourist information centers. In 2020 the total was around 200,000. At the central tourist information office on Albertinaplatz, visitors can obtain information in person as well as brochures in 17 different languages, while a commercial partner sells tickets for cultural events and sightseeing tours. The Vienna Tourist Board's information counters at Hauptbahnhof (Vienna Main Station) and Vienna International Airport are also open every day. During the warmer months of the year, mobile tourist information points (Vienna-branded cargo bikes) provide visitors and residents with advice about neighborhoods outside the first district.

3.2 BRAND MANAGEMENT & B2C MARKETING: INTERNATIONAL MARKETING 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. It also plans and realizes integrated, innovative B2C campaigns for the international travel market using a contemporary communications mix. Central image and video management, production of promotional materials and giveaways, as well as cooperation campaigns with strategic partners, also come under the department's remit.

The goal of B2C Marketing is to anchor the [Vienna brand](#) in target audiences' minds and inspire prospective visitors to come to the city. This is accomplished in 360° communications campaigns as well as data-driven contacts via digital channels, as well as personal communication and inspiration on social media. The team is also responsible for central image and [video management](#) as well as running the [photo.vienna.info](#) and [footage.vienna.info](#) image and video databases, which contain around 1,000 images and one terabyte of full HD and 4k video footage. The department also handles production of all the Vienna Tourist Board's [advertising materials and information tools](#) (brochures, leaflets, posters, etc. in 17 different languages), as well as giveaways ranging from tote bags and espresso cups to aprons. Advertising sales are an important factor in the production of information materials, as they generate revenue which significantly contributes to the production costs for many publications (such as the city map in 13 languages).

In 2016 a new [brand strategy](#) was developed in collaboration with Munich's Nymphenburg Group using insights gained from neuromarketing. Encouraging Enjoyment was defined as the brand core, and – based on a comprehensive analysis of the target group – five brand assets of decisive importance to the success of Vienna's destination brand were identified. The strongest of these is Vienna's imperial heritage, followed by its music and cultural attractions, its culinary culture, aspects of Vienna's status as a modern, livable city, and its healthy balance of urban ambience and green spaces. The advertising strategy developed jointly with the advertising agencies Seite zwei – Branding & Design and Wien Nord Serviceplan and implemented worldwide by the Vienna Tourist Board since October 2016 is based on these brand assets.

International [target audiences](#): in its international market development activities, the Vienna Tourist Board focuses on identifying and reaching out to prospective visitors to Vienna who are most likely to find it appealing as a quality destination with a premium offering and respond best to its sustainable development ambitions, and who can make a contribution to the city's qualities through their cultural diversity and their behavior. Using pre-defined quality criteria, a target group was identified who can either be reached directly or via multipliers, consisting of people for whom Vienna is most relevant as a travel destination and who match the criteria. In terms of Limbic types, they are Open connoisseurs and Performers. Additionally, the special segments of luxury, LGBT and business are targeted.

3.3 MEDIA HOUSE: MEDIA EXPERIENCE OF VIENNA FROM CURATION TO MEDIA RELATIONS

The Media House department (comprising Content Creation and the Channel Management and International Media teams) brings together the organization's content creation activities and its channel and media-specific variations.

The www.vienna.info website acts as a central information and inspiration platform for visitors to the city and residents alike, expressing the spirit of the city in 13 languages. Additional features including an [online booking service](#) for Vienna's accommodations, a comprehensive [event database](#), detailed information on key locations in the capital and customizable travel itineraries complete the picture.

In 2019 the Vienna Tourist Board established another innovative channel with a wide reach: [ivie](#). The digital city guide app for iOS and Android devices includes more than 150 locations, as well as routes for numerous city walks and details of around 800 cafés, bars and restaurants. Facts and figures – and in some cases out-of-the-ordinary stories – bring the individual entries to life, helping visitors connect with some of Vienna's lesser-known sides. The ivie app can also be used to purchase Vienna City Card variants.

Usually sent out once a month, the German and English versions of the Vienna Tourist Board [newsletter](#) keep fans all over the world up to speed on all the latest that Vienna has to offer.

The department's media relations managers are the contacts for international media and also host international media representatives, who the Vienna Tourist Board assists with their research in Vienna. 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 filming work. New topics and offerings in Vienna are presented in defined markets at press events 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. In a normal year, the Vienna Tourist board

is able to verify up to 3,000 media reports on Vienna worldwide which have been initiated by this intensive media work.

The Media House department also plays a leading role in creating the content featured in the Vienna Tourist Board's printed materials. From new magazine [Vienna Intl.](#) to the city maps, its goal is always to produce high-quality content that is both inspiring and informative.

3.4 VIENNA CONVENTION BUREAU AND MARKET MANAGEMENT

The Vienna Convention Bureau and Market Management department are the home departments of the Vienna Tourist Board's B2B experts. The principal task of the Vienna Convention Bureau (VCB) is the global acquisition of congresses, corporate meetings and incentives and to provide comprehensive support for meeting organizers. The Market Management department is the main contact for the travel industry and acts as an interface between the Vienna travel industry and its international counterparts. The focus is on planning and organizing marketing measures for defined incoming markets.

The Vienna Convention Bureau regularly organizes Sales Calls and represents the meeting destination at specialist workshops and fairs, usually including IMEX Frankfurt, IMEX America in Las Vegas and IBTM World Barcelona. In Vienna, it assists meeting organizers at site inspections and famtrips. Before the coronavirus crisis, the VCB represented Vienna at around 40 specialist workshops each year and supported around 400 meeting organizers in the city. The VCB website www.vienna.convention.at provides detailed information on Vienna as a meeting destination. It publishes the annual [Meetings Industry Report](#) as well as the brochure Meeting in Vienna, which summarizes Vienna's assets for conference organizers at a glance in five languages.

The new Meeting Destination Vienna communications concept was launched in 2019. Aligned to the brand strategy for the destination as a whole, in terms of content it draws on the high quality of service and expertise offered by Vienna's meetings industry. The central communicative idea runs through all of the elements of the brand: 'Vienna makes it easy for you' – to plan, organize and enjoy an event. The target audience is addressed directly – one of the messages from Vienna is 'Meet exceptional perspectives through local eyes'. The feeling of people meeting and interacting with one another is encapsulated in the slogan, which, in turn, is a smart extension of the umbrella brand for Vienna. 'Vienna Now. Forever' has been extended to 'Meeting Destination Vienna. Now. Together'.

The Market Management team is responsible for making sure that Vienna is represented in the international travel industry's offerings. Pre-pandemic, its staff represented Vienna on around 80 business trips to industry and public events (workshops, fairs, sales calls etc.) each year and

organized participation in these events for numerous tourism partners. In Vienna, they usually assist 700 or so representatives from the international travel industry each year.

During the coronavirus crisis, the team relaunched many of its activities in new online formats to ensure that it kept in touch with international key accounts and multipliers. In 2020 the Market Management department continued to inspire representatives of the international travel industry, keeping around 44,000 contacts in 18 markets up to date on all the latest developments in the city and ensuring they continued to engage with the city through around 100 virtual B2B formats.

The scope of the department's responsibilities also extends to managing the [Vienna Experts Club International](#) which is a customer loyalty program for the global travel industry. It currently has around 20,000 members in about 80 different countries.

Servicing the Luxury Guest target audience is primarily accomplished through targeted marketing measures which are used to forge closer contacts with gatekeepers and raise awareness of Vienna as a destination among luxury travelers. The Vienna Tourist Board is a member of the Virtuoso and Traveller Made luxury travel networks and is an exclusive partner of the Forum network in London.

Under the Air Service Development agreement, the Vienna Tourist Board and Vienna International Airport have been working together since 2016 on pioneering projects to bring new direct flights to the capital from major cities all over the world. Particularly during the crisis, strong partnerships have been essential for aligning the city's offering and ensuring a coherent approach in the individual markets. Rail service development is another key aspect for nearby markets. This includes work with Austrian National Railways (ÖBB) and Deutsche Bahn.

3.5 CORPORATE PUBLIC RELATIONS: THE VIENNA TOURIST BOARD 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 keep journalists, industry representatives and the city's residents informed both of the Vienna Tourist Board's activities and tourism-related 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 bi-weekly [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).

3.6 COMMERCIAL SERVICES: ORGANIZATIONAL BACKBONE OF THE VIENNA TOURIST BOARD

As the organizational backbone of the Vienna Tourist Board, the Commercial Services department is responsible for a wide range of areas, from HR, controlling and accounts, to organizational development. Cooperations and regional partnerships are also the responsibility of this department, alongside IT, logistics and facility management. The goal of the department is to ensure smooth processes tailored to the needs of users, especially through the use of digitization and automation.

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