

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 and its teams work closely with tour operators and gate keepers (luxury segment), maintain close ties with top international media representatives, help meeting organizers plan and prepare meetings and incentives in Vienna and offer information and hotel booking services for international travelers. In 2023, the main focus will be on 13 markets (primarily Germany, Austria, Switzerland, the United Kingdom, Spain, France and Italy, as well as the USA, Canada, Arab countries, Japan, China and South Korea). In addition, partnerships relating to air and rail service development will also continue to be pursued with a view to enhancing Vienna's links to international rail and air travel networks. The Vienna Tourist Board also provides visitor services in Vienna from its main tourist information center behind the Vienna State Opera, a welcome points at 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 FINANCING OF THE VIENNA TOURIST BOARD

The budget for 2023 is EUR 31.8 million. Before the pandemic, a local accommodation tax of 3.2% of net room rates, levied under Vienna's Promotion of Tourism Act, accounted for 85% of the total. Due to the shortfall in local tax revenue due to the Covid-19 pandemic, an agreement was reached

with the City of Vienna under which it agreed to contribute EUR 22m. For 2023, funding from the City of Vienna, which is adjusted in line with inflation, will amount to EUR 23.5 million, which accounts for about 73.9% of the Vienna Tourist Board's total budget. The remainder comes from the Vienna Chamber of Commerce and the Board's own revenues.

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).

After the sharp downturns in 2020 and 2021, the picture for 2022 reveals clear signs of recovery: between January and December 2022 Vienna posted [13.2 million visitor overnights](#), which represented a 164% year-on-year increase on 2021 (just five million visitor overnights) and was equivalent to 75% of the total recorded in 2019 before the outbreak of the crisis. In 2022 net revenue from overnights at Vienna's commercial accommodation providers amounted to EUR 884.3 million – up 189.4% on 2021 and only 13.4% short of the record set in 2019.

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 4.7 billion (reporting year 2018). This represents approximately 4.8% of Vienna's gross regional product, and approximately one Fifth of the induced economic impact from tourism for the whole of Austria.

In addition to the 4.7 billion euros in direct value added in Vienna, tourism in Vienna generates 900 million euros in value added for the rest of Austria (excluding Vienna). Tourism in Vienna ranked second among all of Austria's federal provinces (behind Tyrol and ahead of

Salzburg) – in terms of both direct and induced economic impact, as well as tourist spending (EUR 7.2 billion).

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), Vienna’s tourism and leisure industry sustains every ninth full-time job in Vienna. In good times, the industry stands for 103,300 full-time jobs (reporting year 2018).

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 (3,600 respondents in 2022).

Visitors to Vienna (core area) come from all over the world. In 2019, 83% of overnight stays were accounted for by visitors from abroad, with European countries behind 59% of this amount and Asia and North America (primarily USA) contributing 13% and 9% respectively. From March 2020, the majority of overnight stays were attributable to nearby markets, with the effects of the gradual return of long-distance markets, primarily the USA, making themselves increasingly felt as 2022 progressed. Main markets before the crisis in 2019 and 2022, measured in terms of total overnights:

#	2019		2022	
1	Germany	19%	Austria	21%
2	Austria	17%	Germany	20%
3	USA	6%	USA	6%
4	Italy	5%	Italy	5%
5	United Kingdom	4%	United Kingdom	4%
6	Spain	4%	Spain	3%
7	China	3%	France, Monaco	3%
8	France	3%	Romania	3%
9	Russia	3%	Israel	3%
10	Switzerland	3%	Poland	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 were 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 71,000 beds in 398 hotels and pensions (including seasonal hotels open only in summer), 59% are in the luxury or premium 4 and 5-star category. In 2022, the average length of stay was 2.39 nights (2019: 2.2), and average bed occupancy around 61% (2019: around 62%). This is equivalent to a room occupancy of around 79% (2019: around 80%). Before the coronavirus pandemic, Vienna had the highest bed occupancy rate in Austria, which it went some way to achieving again in 2022.

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. The [2022 Vienna meetings industry statistics](#) showed that the 4,339 meetings

(congresses and corporate events) held during the year represent a 143% increase over 2021 and 79% of the pre-pandemic 2019 total. Participant numbers at these meetings amounted to around 451,000 in 2022. Together they generated around 1,187,000 overnights (2019: 1.6 million) The meeting industry is one of the main sources of revenue for the city's visitor economy. Congress participants generate significantly higher revenues than leisure tourists. At an average of EUR 552, their daily expenditure is about twice as high as that of the average visitor to Vienna.

The city's outstanding meeting infrastructure, the high service standards of meeting service providers (travel agents caterers, interpreters, etc. specializing in meetings) 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 2022 saw Vienna claim first place worldwide with 162 events, ahead of Lisbon, Paris, Barcelona, Prague and Madrid. And in the latest UIA congress ranking for 2022, Vienna placed second worldwide (252 meetings). The list was topped by Brussels (570). After Vienna, the rest of the top ten was made up of Singapore (203), Tokyo (201), Lisbon (167), Madrid (153), London (148), Barcelona (147), Seoul (135) and Paris (130).

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. The Vienna Experts Club currently has around 500 members.

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 2022, the total was around 430,000. At the central tourist information office on Albertinaplatz, visitors can obtain information in person as well as brochures in eight different languages, while a commercial partner sells tickets for cultural events and sightseeing tours. The Vienna Tourist Board's information counter at Vienna International Airport is 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 eight 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 eight 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 the Content Creation, 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 12 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 includes more than 1,000 locations, as well as routes for numerous city walks, an event database 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. Among the app’s other features is a function that shows how busy the location in question is. Users can also purchase the Vienna City Card through the ivie app.

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. Each 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 B2B MANAGEMENT

The B2B Management department comprises experts from the Vienna Convention Bureau, International B2B Relations and B2B Marketing Communications teams. The Convention Bureau's principal task is the global acquisition of congresses, corporate meetings and incentives and to provide comprehensive support for meeting organizers. As the main contact for the travel industry, the International B2B Relations team acts as an interface between the Vienna travel industry and its international counterparts. Its focus is on planning and organizing marketing measures for defined incoming tourist markets. The B2B Marketing Communications team is responsible for B2B communications initiatives targeting the travel, international mobility and meeting industry sectors. Market development is focused on the premium target group, positioning Vienna above all as a city of art and culture, as well as advancing air and rail service development, and the luxury travel segment.

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. Vienna is represented at around 40 specialist workshops each year and supports 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 International B2B Relations team is responsible for making sure that Vienna is represented in international travel industry offerings. Each year, its staff represent Vienna on around 80 business trips to industry and public events (workshops, fairs, sales calls, etc.) and organize participation in these events for numerous tourism partners. In Vienna, they assist 700 or so representatives from the international travel industry each year. During the coronavirus crisis, many formats were carried out as online events instead to maintain contact with international key accounts and multipliers in this exceptional situation.

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 17,000 members in 90 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 Serandipia by Traveller Made luxury travel networks.

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](#) and writing articles for trade publications.

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 employer branding and 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 digitalization and automation.

The Commercial Services department is also in charge of the Vienna Film Incentive, which promotes international film productions in the city. Of central importance for Vienna as a tourist location, they are an important source of value creation for Vienna's Visitor Economy and a key driver of the city's continued internationalization. Sustainability is also anchored in the department as a core strategic focus – it is where the various threads come together as regards the management and coordination of internal company measures and projects as well as formally recording and documenting them.

Ongoing development of the [Vienna City Card](#), the Vienna Tourist Board's official visitor card, also falls under the responsibility of this department. The Vienna City Card entitles holders to numerous discounts as well as 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 was certified in accordance with the Austrian *Umweltzeichen* ecolabel in November 2022, making it the world's first green visitor card.

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