

Visitor Economy Strategy 2025



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#ShapingVienna

X.Festival 2020, 02 December 2020

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Vienna Tourist Board



VISITOR ECONOMY

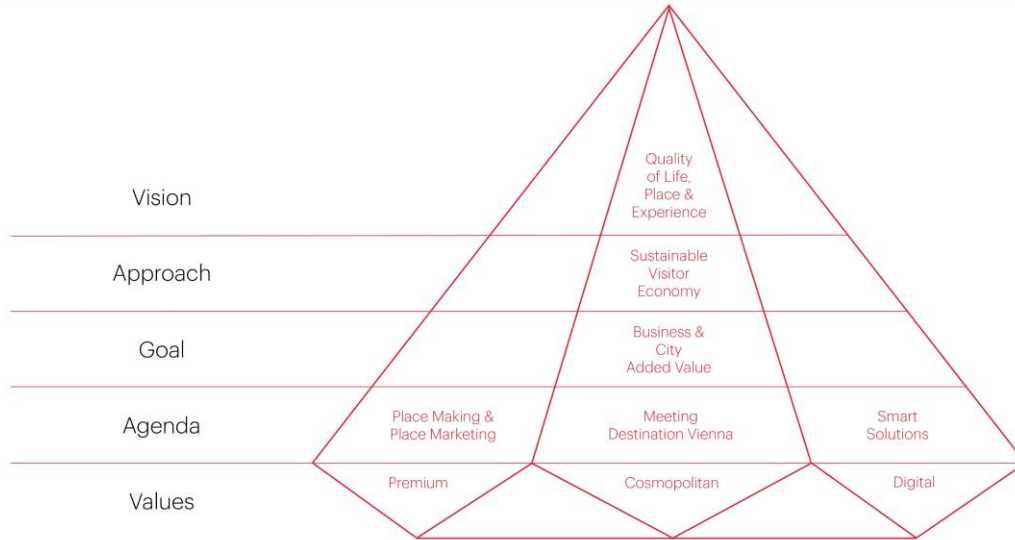
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The diagram is a comprehensive mind map of the Vienna tourism ecosystem, centered on 'VIENNA TOURISM ECOSYSTEM'. It branches out into twelve main categories, each with sub-nodes and illustrative icons:

- MEETINGS & EVENTS**: Congress, meeting & event locations; Public & private security providers; AV tech & production; Caterers; Interpreters; Stadt Wien Marketing.
- RESIDENTS & VISITORS**:
 - INTERNATIONAL ORGANIZATIONS & COMPANIES**: Corporates; Scientific associations; Professional congress organizers (PCOG); Fair & event organizers.
 - REGIONAL, NATIONAL & INTERNATIONAL NETWORKS & PARTNERSHIPS**: Start-up hubs & accelerators; Venture capital & crowdfunding; Founders & Start-ups; Expats & International Students.
- LEISURE & EXPERIENCE**: Dances & nightclubs; Biospheres & national parks; Health & wellness facilities; Festival & concert organizers; Sports associations & clubs; Indoor & outdoor swimming pools; Leisure amenities (Denube tower, Prater, casinos, climbing centers, etc.).
- ACCOMMODATIONS**: Serviced apartments; Student residences; Sharing platforms (home exchange, couch surfing, etc.); Providers of rooms and holiday apartments (private & commercial); Youth hostels; Campgrounds; Hotel industry; Austrian Convention Bureau (ACB); Universities and universities of applied sciences; Incoming, event & incentive agencies and DMCs; Educational institutions (technical schools, adult education, etc.); Austrian Hotelier Association (ÖHV).
- RESEARCH, CONSULTING & CONTINUING EDUCATION**: Consulting companies (Business, sustainability, inclusion, etc.); Vienna Employment Promotion Fund (waff); Public Employment Service Austria (AMS); Employment agencies; Vienna Experts Club.
- URBAN DEVELOPMENT & PUBLIC SPACES**: Parks & gardens; Federal Monuments Authority; Property developers; Architecture & planning; Cultural entrepreneurs; District and local initiatives.
- ART, CULTURE & SIGHTS**: Art mediators; Accredited tour guides & travel guides; Sightseeing tours (Vienna Ring Tram, Hop-On Hop-Off coach tours, horse-drawn carriages, etc.); Animal parks & zoos; Churches & religious communities.
- GUIDES & TOURS**: Ticketing; Tour providers & operators; Regional partners (Schloss Hof, Klosterneuburg Monastery, etc.); F&B & leisure food; Retailers; Shopping streets & shopping centers; Providers of payment systems (credit cards, tax free shopping, digital payment systems); F&B & leisure food; Markets.
- RETAIL, FOOD & BEVERAGE**: Tradespeople & producers; (Regional) F&B and luxury foods.
- COMMUNICATIONS & MARKETING**: Local information services; Photographers; Graphic design & advertising agencies; Media; Mobility Agency Vienna.
- MOBILITY**: Vienna International Airport; Airlines; Car hire companies; Car park operators; Taxi and private hire companies.
- VIENNA MUNICIPAL POLITICAL/MUNICIPAL ADMINISTRATION**: Wiener Linien; Coach companies; Transport Authority for the Eastern Region (VOR); Rail companies (ÖBB, Westbahn, Wiener Lokalbahnen, CAT); Vienna Business Agency/ expat center; International & career offices at universities; Austrian Exchange Service (OeAD).

In a nutshell

Strategy diamond



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NET REVENUE FROM OVERNIGHT STAYS ^{(1) (2)}

all accommodations



2018 € 900 million
2025 € 1.5 billion

ECONOMIC IMPACT FROM TOURISM ⁽³⁾

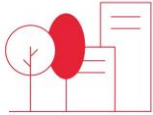
direct and indirect effects



2018 € 4 billion
2025 € 6 billion

SUSTAINABLE OPERATORS ⁽⁴⁾

Certified tourism and
leisure operators double



2018 112 operators
2025 224 operators

Objectives for 2025

BUSINESS & CITY ADDED VALUE

VISITOR SATISFACTION ^{(5) (7)}

Visitors would recommend Vienna



2018 = 2025
9 out of 10 visitors

RESIDENT SATISFACTION ^{(6) (8)}

Tourism is positive



2018 = 2025
9 out of 10 Viennese

REDUCED ENVIRONMENTAL FOOTPRINT ⁽⁵⁾

of visitors from nearby markets



2018 car more than rail
2025 rail more than car

(1) Municipal Department 23 - Economy, Labor and Statistics, Municipal Department 6 -Accounting Services, Duties and Charges & own calculations
(2) Not including breakfast and VAT
(3) Statistics Austria/Austrian Institute of Economic Research Vienna (Wifo) - Tourism Satellite Account (TSA)
(4) According to the Austrian Federal Ministry for Sustainability and Tourism, in 2018 around 150 Viennese businesses representing the tourism sector had the Austrian ecolabel "Österreichisches Umweltzeichen" certification. After adjusting for businesses not directly involved in tourism (catering services at retirement homes and hospitals, and company canteens), this leaves 112 companies representing the accommodation industry/camping, F&B (incl. event, catering and party service), meetings and event venues and museums.

(5) Vienna visitor surveys conducted by Tourismus Monitor Austria (T-MONA)
(6) With a statistical fluctuation margin of +/-1.6%
(7) With a statistical fluctuation margin of +/-2.5%
(8) Vienna Tourist Board, independent survey conducted with Manova

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...then COVID-19 struck

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Status Quo – market Vienna: January-September 2020

INCLUDING ALL FORMS OF ACCOMMODATION (CAMP SIGHTS, HOSTELS, PRIVATE ACCOMMODATION ETC.)

ACCOMMODATION

Arrivals (1-9)	1.844.661
Change in % from 2019 to 2020 (1-9)	-68%
Overnight stays (1-9)	4.169.038
Change in % from 2019 to 2020 (1-9)	-68%
Net revenue from overnight stays (1-8)	€ 188.600.245
Change in % from 2019 to 2020 (1-8)	-70%

Normalization only with the availability of a therapy / vaccine

ON/OFF
ONE METER
LOW or NO TOUCH ECONOMY



RESHAPING VIENNA



Re-Cover

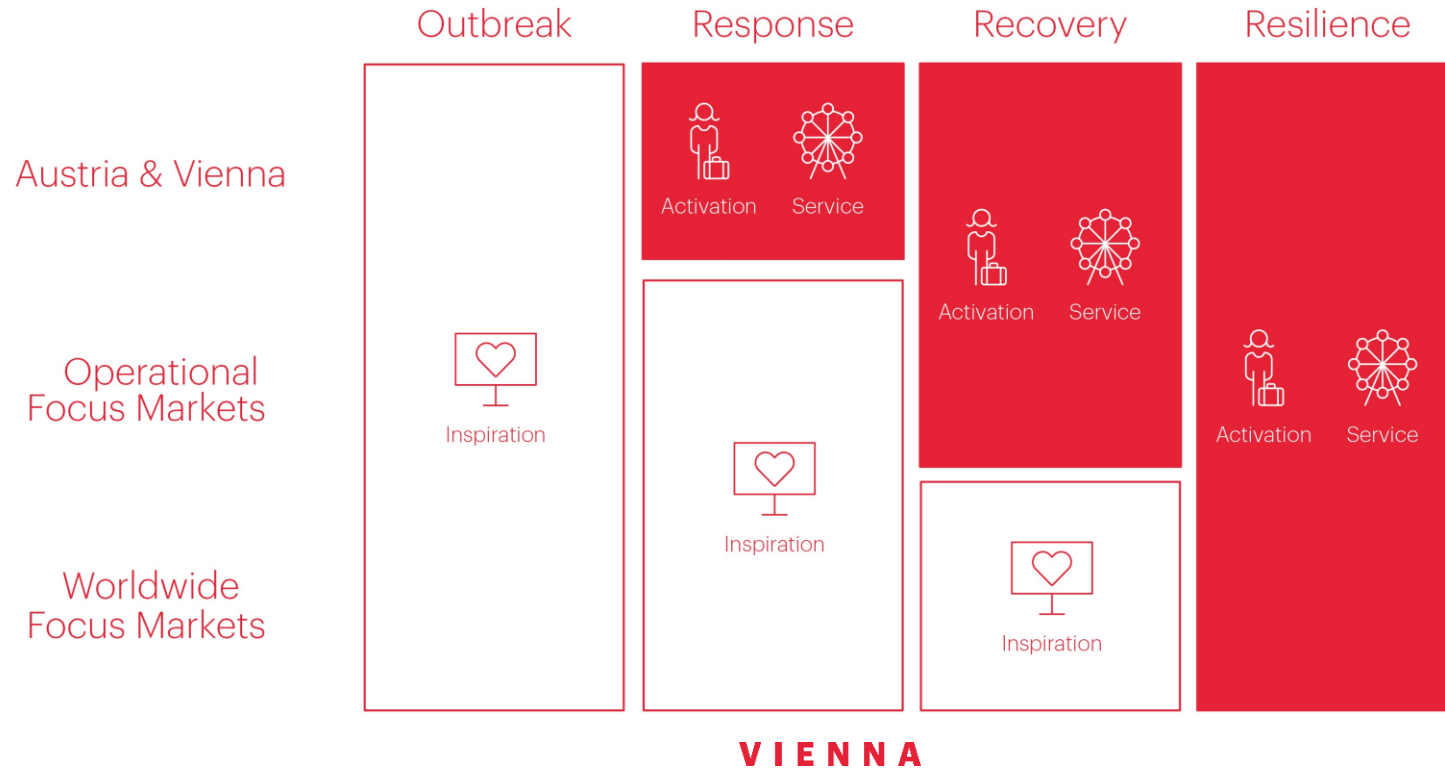
&



Re-Imagine

Reactivation Plan

RE-COVER





Agile Response

RE-COVER

- Task Forces
 - Develop new products
 - Set up new and flexible marketing strategies
 - Monitor market developments
 - Foster dialogue and service local stakeholders
- Stay flexible

Vienna City Card Experience Edition

- Supports local businesses
- Gives access to experiences & places normally not open to the public
- Targets the local market

BMW ART GUIDE X VIENNA TOURIST BOARD

RE-COVER

- Culture collaboration with BMW Art Guide
- Facilitating between BMW and cultural institutions in Vienna



© Wien Tourismus / Pat Domingo

Virtual B2B-Activities / Global Exchange

RE-COVER

- 95 virtual formats
- In 18 markets
- Around 44,000 contacts reached
- Over 20 formats planned by the end of 2020

95

FORMATS



44,000

CONTACTS

Signature events

RE-COVER

- Strengthen Vienna's reputation as capital of art and culture
- Events with international visibility
- Presenting Vienna as a lively cultural city during Covid-19

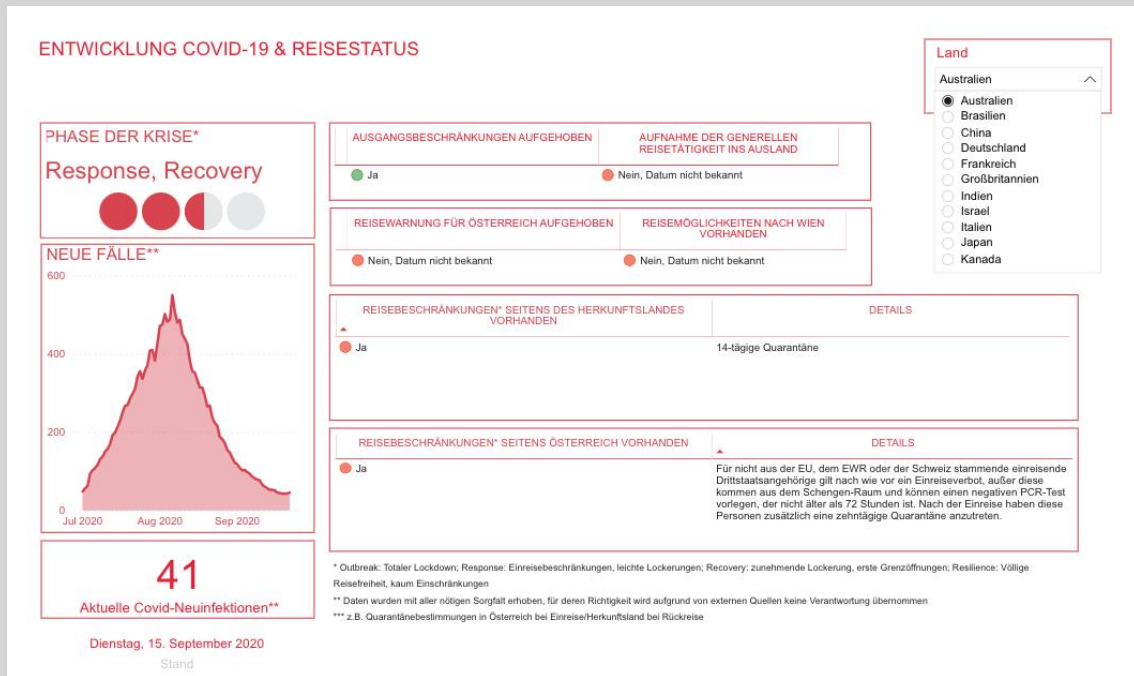


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Dashboard

RE-COVER

- Live on dashboard.vienna.info
- 28 markets
- Covid-19 development, travel restrictions & travel intentions



Stakeholder communication

RE-COVER

- Update for Vienna's Travel Industry
- Strategy Group
- Stakeholder dialog: Art; Food & Beverage
- Market Insights GER, SUI, AUT
- Luxury Cercle
- Vienna Experts Club



Organizing safe meetings in Vienna: Best Practice

RE-COVER

Vienna Tourism Conference 2020

- Hybrid event
- Digital avatars & virtual 3D venue
- Joined-up prevention plan
- Rapid Covid-19 antigen test for all participants & testing lanes in front of the venue
- Additional air filtration units
- <https://youtu.be/EKRefRkMLOQ>

200

GUESTS ON SITE



© WienTourismus / Paul Bauer



© WienTourismus / Paul Bauer

1000

LIVE VIEWERS

Safe Stay

RE-COVER

- Quality & safety seal for the hotel industry
- Currently approx. 60 certified hotels
- A cooperation between the Vienna Economic Chamber (WKW) & the Vienna Tourist Board



Funding and Support - Excerpt

FEDERAL GOVERNMENT

- Short-time working model & restart bonus
- Financial support for the event sector (€ 300M)
- Austrian Airlines financing package (€ 600M)
- Bridging Fund for artists & performers
- Funding package for bars & restaurants (max. € 500M)
- Safe Hospitality – tests for the tourism sector
- Fixed cost subsidy
- Deferral of loan repayments
- Hardship fund (max. € 2BN)

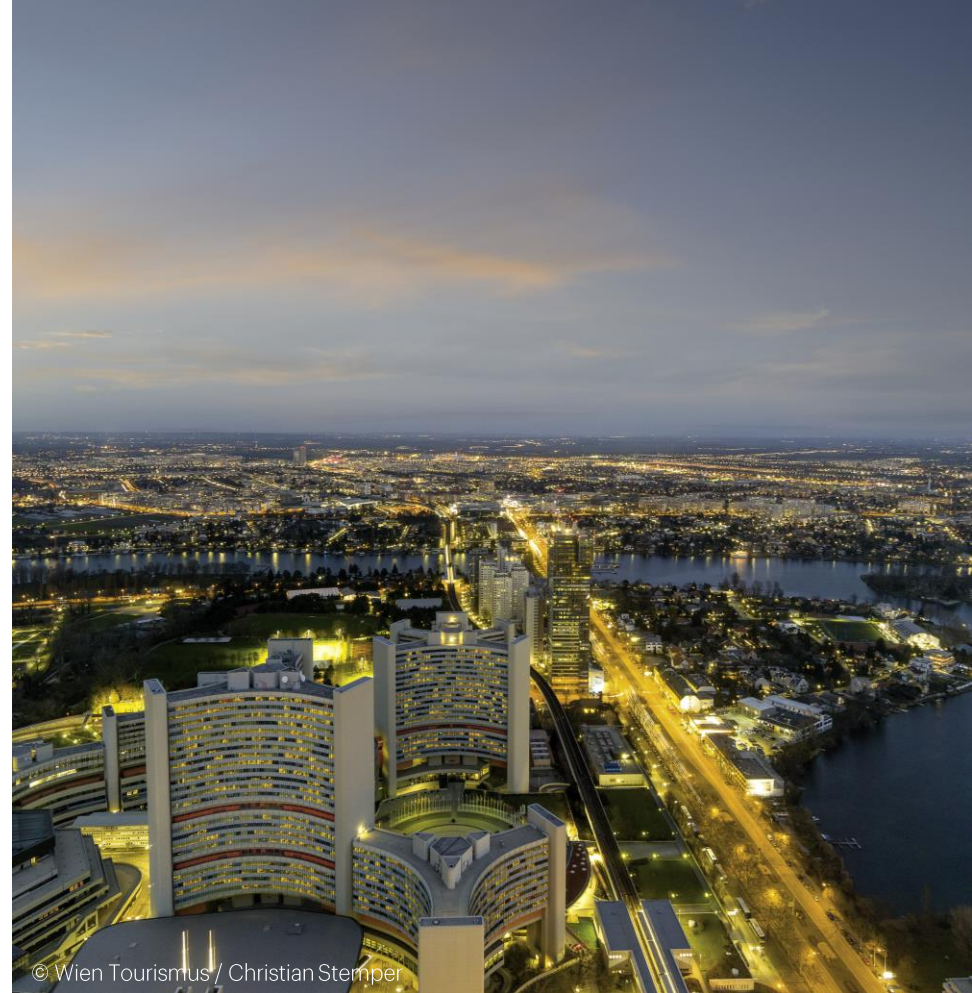
CITY OF VIENNA

- Support program for Vienna's hotel industry (€ 15M)
- Short-term investments in companies by the city of Vienna "StolzaufWien" (€ 50M)
- Vienna Restaurant Vouchers (€ 40M)

Re-Opening the European Union

RE-COVER

- Reestablishment of the European single market
- Replacement of travel restrictions with a uniform EU travel regime



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Re-Imagine

VIENNA

Vienna's reputation

RE-IMAGINE

- Recovery Index :#1

CBRE, 2020

- World's 10 Greenest Cities-Index: #1

Resonance Consultancy, 2020

- Quality of Living Survey: #1

Mercer, 2019

- 25 Top Destinations in October: #2

Condé Nast Traveller, 2020



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Essence of Vienna's Visitor Economy

RE-IMAGINE

- Strengthen the businesses of the Visitor Economy & the business location
- Creating new experiential spaces & upgrade the user experience
- Preserving the city's unique flair



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Preserving the supply

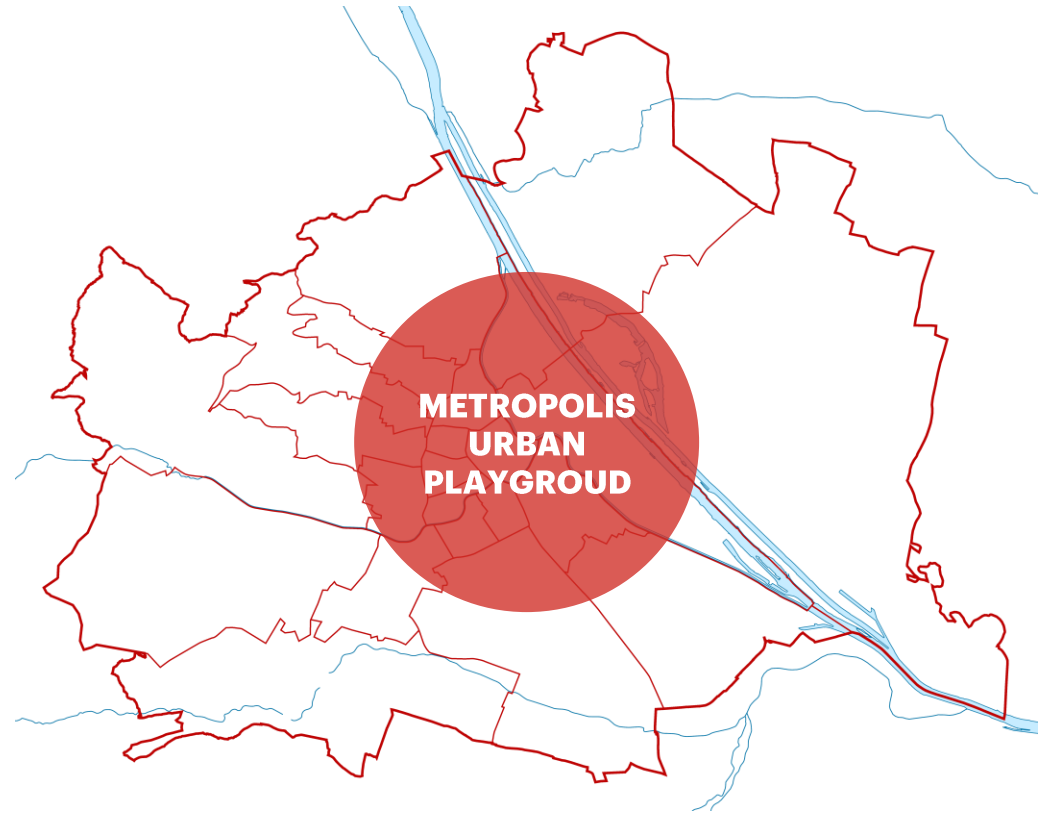
RE-IMAGINE

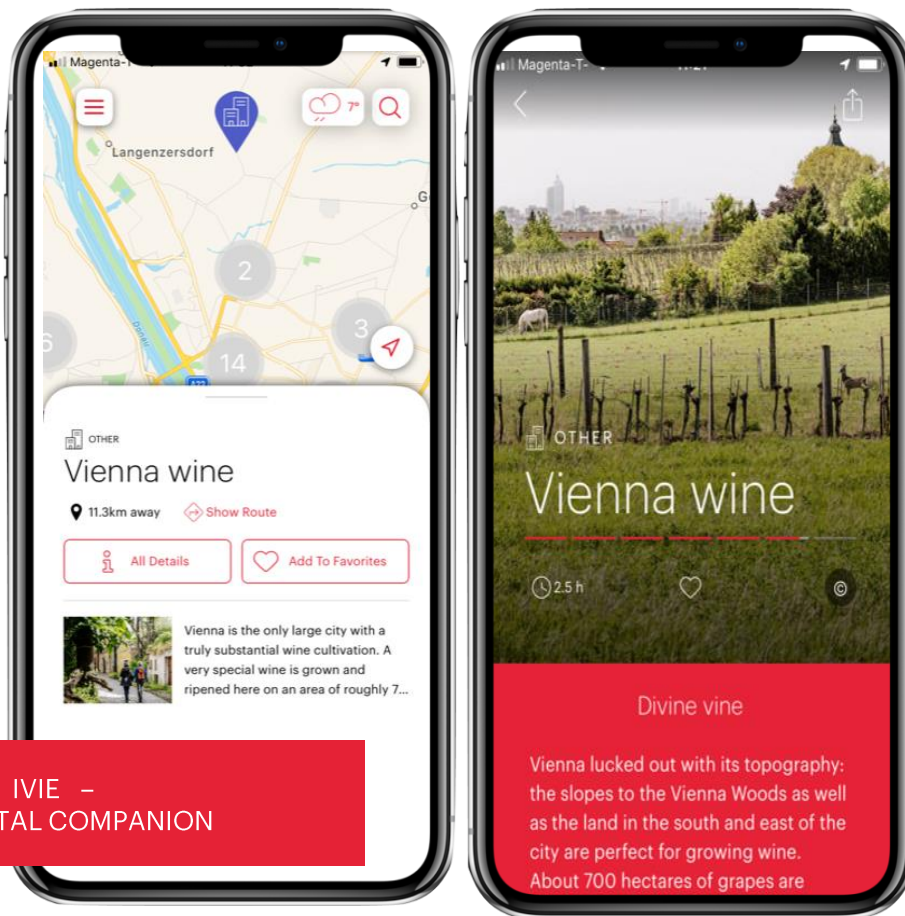
- Securing the workforce
- Ongoing investments: 22 planned openings until 2023
 - Mandarin Oriental
 - Rosewood Vienna

New experiential spaces

RE-IMAGINE

- 15-minute city (Paris): convenient access to services & goods in a short time frame
- New destinations within the destination
- Making local, cultural offers accessible to residents
- Versatile and flexible use of places





IVIE -
MY DIGITAL COMPANION

Everything is going to be fine in the end.
If it's not fine it's not the end.

Oscar Wilde

Thank you for your attention!



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VIENNA

NOW ♦ FOREVER