

SHAPING VIENNA

VIENNA

EDITORIAL

EXECUTIVE SUMMARY

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EDITORIAL

Following on from its tourism concepts of recent years, Vienna is now presenting a **Visitor Economy Strategy** for the first time. The name says it all!

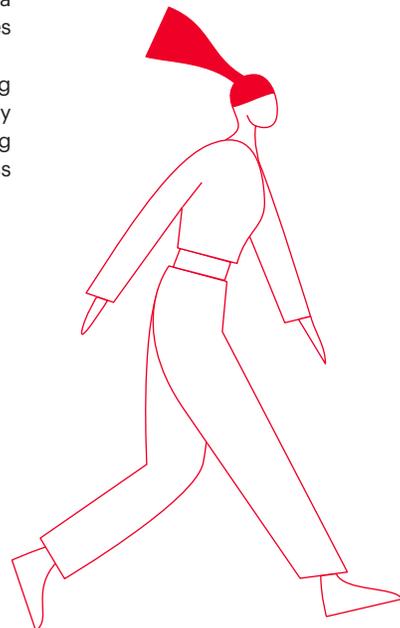
The move away from the foreign travel of the post-war period to the tourism of the 20th century primarily reflected a new openness towards the rest of the world and the professionalization of an entire industry. Tourism shifted from a sideline to a profession, and in Vienna it grew into a highly-regarded, booming sector of the economy. Now, the Visitor Economy Strategy lays down the latest milestone in this success story: it opens up perspectives on the diversity of our guests and the countless “temporary Viennese” who visit the city, or, for a short time at least, make it the center of their lives. Above all, the focus is on the city itself: the visitor economy leverages Vienna’s strengths and drives its development as a world capital – benefiting people who live in the city and Viennese businesses alike.

Which is why Vienna can continue to target growth as a tourist destination. However, this growth needs to be sustainable and cannot undermine the foundations of the city’s success. It must also be in tune with its needs.

The ecosystem of the visitor economy is an integral part of the city’s make-up – the accommodation industry, the congress, meetings and events sector, as well as its cultural institutions, retailers, gastronomy, leisure and entertainment industries, international organizations and companies, transport providers, universities and research institutions are all part of the picture. They are of critical importance for Vienna, with visitors contributing significantly to demand for them, their esteem, renown and international reach. One of the central goals of this strategy is to promote the positive interactions between the various elements of this ecosystem.

But this also means addressing areas that might be sensitive, where vested interests might conflict with the interests of the destination as a whole. The Visitor Economy Strategy clearly sets out how regulation on the one hand can be balanced with openness, tolerance and a certain “laissez-faire-attitude” on the other. But there is no mistaking: travel is an achievement of civilization! In a time when nationalism and provincialism are making a comeback, as a truly cosmopolitan city Vienna is open to people, influences and trends from all over the world.

A strategy needs clear objectives and benchmarks. When collecting data and indicators on the development of the destination, Vienna is already setting new standards internationally – and this is a key part of identifying trends, initiating responses that are fact-based and highlighting progress towards achieving self-imposed targets.



The objectives of the Visitor Economy Strategy are ambitious and challenging – achieving them is realistic, but this is predicated on close cooperation and partnership with the ecosystem’s stakeholders in Vienna’s visitor economy. With this in mind, the development process was guided by a collaborative and partnership-based approach from the outset. Representatives from the City of Vienna and the local districts, the tourist industry and numerous other sectors have played an active role in the strategic process. We would like to thank all of them for their contribution and call on them to work with us to turn our vision into reality.

Peter Hanke
Executive City Councilor of Finance, Business,
Digital Innovation and International Affairs
President, Vienna Tourist Board

Norbert Kettner
Managing Director, Vienna Tourist Board

EXECUTIVE SUMMARY

Vienna can look back on a long history of success as a tourist destination. The city's performance over the past three decades reflects this: 2018 brought around 16.5 million bednights, compared with about 7.5 million visitor overnights in 1990. One development has been particularly gratifying: the city's hoteliers have recorded a significantly higher increase in revenue than in the number of overnight stays. The goal of 18 million overnight stays and EUR 1 billion in net revenue from overnights by 2020 is within reach.

Vienna as a tourist destination

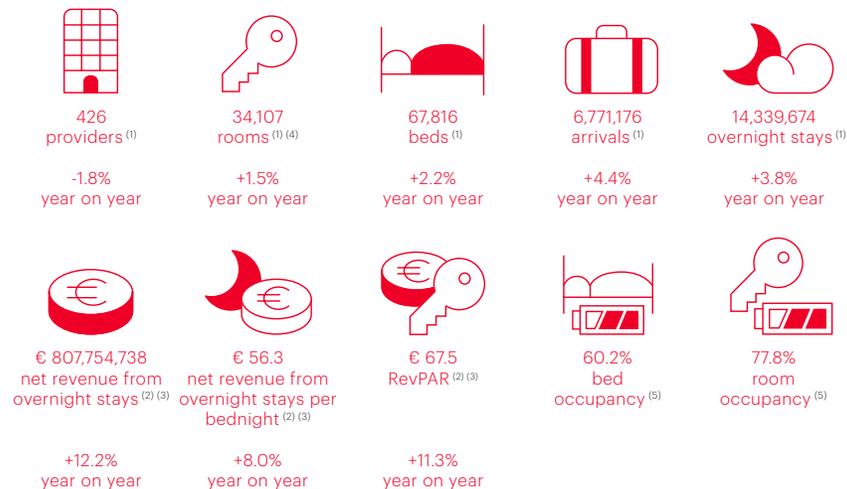
COMPARISON OF KEY INDICATORS

ALL ACCOMMODATIONS 2018



All accommodations incl. youth hostels, campgrounds, private accommodation, apartments, holiday apartments, etc.

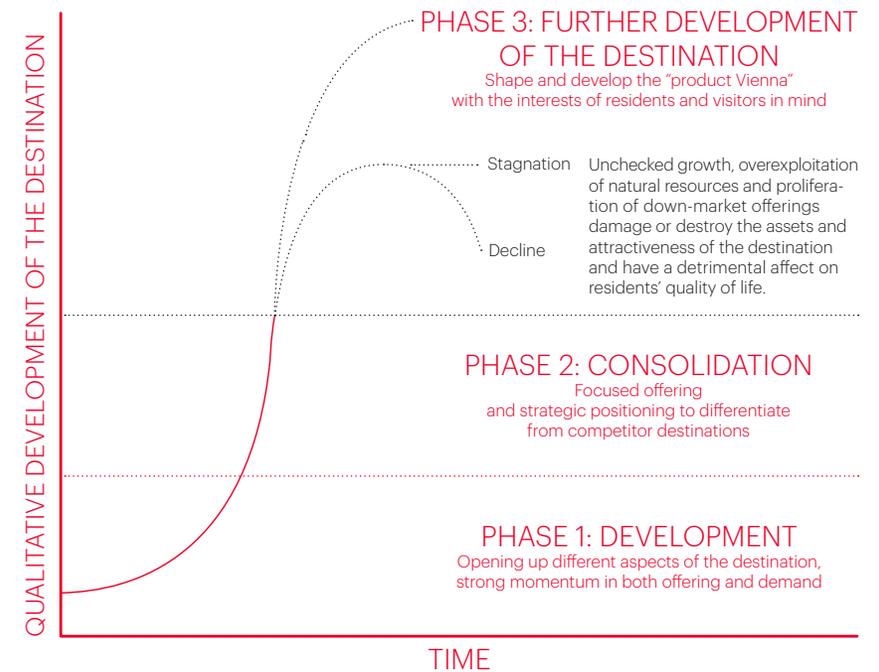
HOTELS & PENSIONS 2018



- (1) Municipal Department 23 – Economy, Labor and Statistics
- (2) Municipal Department 6 – Accounting Services, Duties and Charges & own calculations
- (3) Not including breakfast and VAT
- (4) Number of rooms for hotels & pensions only
- (5) Calculated according to the monthly figures published by Municipal Department 23 – Economy, Labor and Statistics – based on actual availability in month

But this success story cannot be taken for granted. Tourism destinations tend to go through cycles: after phases of development and growth, professionalization and consolidation, a destination has to redouble its efforts to sustain and broaden its success, while allowing as many different stakeholders to participate.

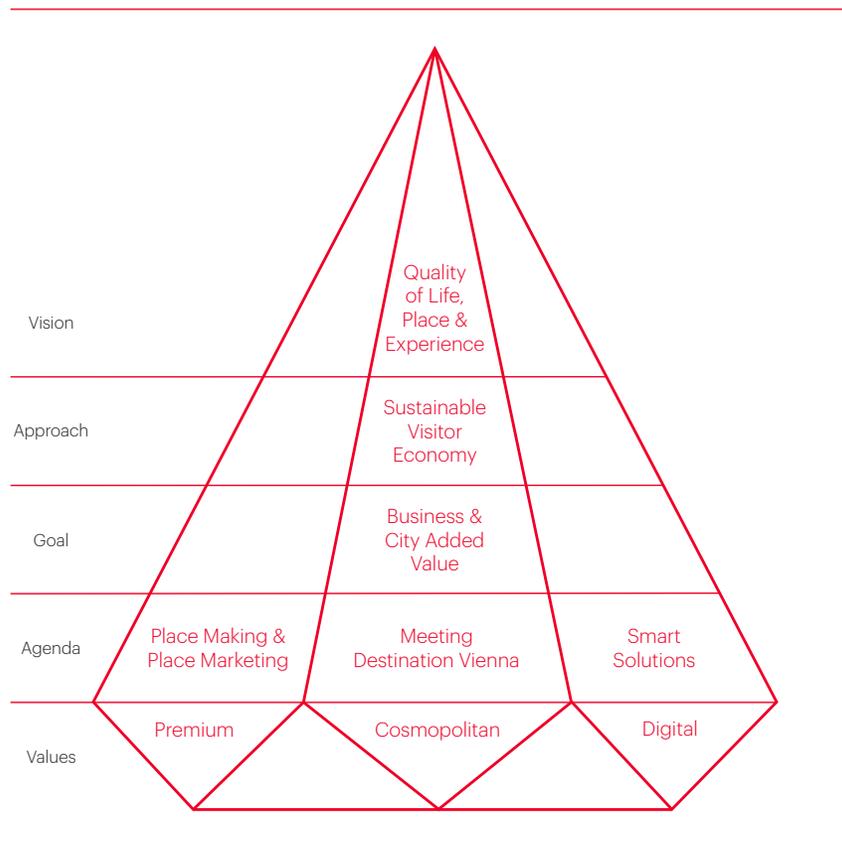
Cycles of destination development



Vienna is well placed to achieve this: while visitor numbers continue to go from strength to strength, the city also has a strong offering in terms of quality and variety, and its infrastructure and services are outstanding. And the Viennese population is overwhelmingly supportive of developments: surveys have repeatedly shown that more than 90% of residents view tourism as being positive for the city. This state of affairs not only allows us to build on existing trends but to strike out in new directions from a position of prosperity, success and consensus. Without the pressure of a brewing crisis, but with a clear appreciation of upcoming challenges and opportunities.

Viennese Strategy Diamond

The high quality of life in the city is one of Vienna’s biggest assets. The way of life and overall environment for guests and residents has a significant impact on the experiences and impressions they take away with them. Upholding this means continuously developing the city and proactively investing in its qualities. We chose the “Viennese Strategy Diamond” to visualize our new destination strategy. It represents Vienna’s multifaceted beauty, beloved of visitors and residents alike. It also signifies that the city is a precious commodity that must be handled with the utmost care.



Vision

In its Visitor Economy Strategy 2025, Vienna is developing a vision for the future that has beneficial and sustainable growth of the destination at its heart. The needs of visitors and residents are carefully balanced. The idea is that visitors do not just “consume” the city and what it has to offer, with the visitor economy instead making an active contribution to the city’s qualities: to the qualities that set Vienna apart, and which locals and visitors alike benefit from (quality of life), to the quality of the time spent in the city, and the quality and variety of the offering (quality of place) and finally to the quality of the guest experience (quality of experience).

Approach

The basis for achieving this vision is the concept of a sustainable visitor economy that extends far beyond the standard definition of tourism: the term “visitors” applies to all guests who come to Vienna for a short break or longer stay, who live, work or study here, go shopping or stroll the streets, make use of its cultural and leisure facilities – always leaving some form of trace in the process, whether it takes the shape of economic effects, their view of the city from an outsiders’ perspective, or through the wealth of influences, ideas and skills that they bring to Vienna.

This will also require collaboration between a considerably broader ecosystem of participants, strategies that are carefully aligned to one another and new forms of co-operation.

Objective

THE VISITOR ECONOMY ADDS VALUE –
BUSINESS ADDED VALUE FOR COMPANIES
AND CITY ADDED VALUE FOR THE CITY
AND ITS RESIDENTS.

We measure this using **six key performance indicators** (KPIs), which present the revenue, direct and indirect economic impact of the visitor economy. In addition, residents’ satisfaction is put on an equal footing with the quality of the experience for guests. The goal of greater sustainability and safeguarding of resources should manifest itself at institutions in the city and among guests, whose ecological footprint will be reduced.

Agenda

The Visitor Economy Strategy outlines three central action areas that the city will prioritize with the support of its partners in the ecosystem over the next few years:

- **PLACE MAKING & PLACE MARKETING:** New and interesting locations within the destination will create additional attractions for visitors and help to ensure that the positive effects of the visitor economy are better distributed in the city.
- **MEETING DESTINATION VIENNA:** The congress and business events industry, today one of the flagship segments of Vienna's visitor economy, will be increasingly used in future to boost the international visibility and competitiveness of the city as a business location.
- **SMART SOLUTIONS:** The Vienna visitor economy is committed to promoting careful and sustainable use of natural resources and developing smart solutions so that the destination will continue to offer the quality of life to future generations that sets it apart today.

Values

In all points, the Visitor Economy Strategy is based on fundamental values that are perhaps more important today than ever before:

- **PREMIUM:** Vienna is committed to delivering premium quality. Not just as a hallmark, but also as a reflection of our mission to continue investing in and fighting for it.
- **COSMOPOLITAN:** Vienna is all about open-mindedness, diversity and tolerance. Cosmopolitan Vienna embodies the ideal of the European city. It is *the* major city in the heart of Europe and sees its international make-up and the diversity of its inhabitants as a strength.
- **DIGITAL:** Vienna focuses on innovation and the latest technology. But not just to be part of the latest trend, but for the benefit of visitors and residents under its approach to digital humanism.

Sustainability and a responsible approach to natural resources underpin quality of life in the city and, as a result, the competitiveness of the destination. Vienna's visitor economy is committed to the World Tourism Organization's "UNWTO Global Codes of Ethics for Tourism"¹, the fundamental principles of the Smart City Vienna framework strategy² and the achievement of the UN's Agenda 2030, by contributing to the following "Sustainable Development Goals"³:

¹ <http://ethics.unwto.org/en/content/global-code-ethics-tourism>

² <https://smartcity.wien.gv.at/site/en/the-initiative/framework-strategy/>

³ <https://www.un.org/sustainabledevelopment/sustainable-development-goals/>

Sustainable Development Goals



The Vienna Tourist Board is an affiliate member of the World Tourism Organization (UNWTO) and, through its membership, is committed to the Global Code of Ethics for Tourism.

VISION

QUALITY OF LIFE,
PLACE AND
EXPERIENCE



Vienna is an outstanding host for leisure and business travelers, for congresses, fairs and events, and for expats as well as students. Service is professional and comes with a dash of Viennese charm, and visitors' myriad interests, wishes and preferences are met with a rich variety of quality offerings. This is part of the tourism success story and will continue to make Vienna stand out in future.

The new Vienna Visitor Economy Strategy, which was drawn up with the support of the destination's key stakeholders under the auspices of the Vienna Tourist Board, goes significantly further: the focus is no longer exclusively on the guest, but on the city itself and the numerous different qualities that it offers for residents and visitors alike. Growth in bednights and consumption, in congress and participant numbers, in flight movements or cruise liner landings are not an end unto themselves. A factor is beneficial if it actually benefits the city. The success of the destination can be measured in terms of whether it is able to make a contribution to quality of living, quality of stay and quality of service, to variety of offerings, prosperity and competitiveness to the benefit of more and more people.

"THE NEW VISITOR ECONOMY STRATEGY CAPITALIZES ON THE 'GOOD' THAT VISITORS BRING IN HARMONY WITH THE LOCAL POPULATION. THERE IS A STRONG REALIZATION THAT 'VISITORS' BRING NOT JUST ECONOMIC VALUE BUT ALSO KNOWLEDGE, CULTURE AND THE EXCITEMENT OF COLLABORATION. ONLY A WELL-BALANCED STRATEGY WILL BE BENEFICIAL TO ALL THAT LIVE IN OR VISIT THE CITY. THE STRATEGY SHOWS VISION AND DRIVE, GUARANTEEING AN EXCITING AND SUSTAINABLE FUTURE. VIENNA, A TRULY SPECTACULAR DESTINATION!"

Ben Goedegebuure,
Maritz Global Events, member of the
international advisory board

Vision:

- **QUALITY OF LIFE:** Vienna is the world's most livable city. The quality of life is palpable, it defines and shapes the city. Visitors benefit from it and make their own contribution to the capital's quality of life and vitality, they make the city more diverse and add color.
- **QUALITY OF PLACE:** The Austrian capital is beautiful, high-quality, elegant and modern: the city functions well for people with different interests and needs, and it uses the natural resources available to it carefully. Visitors behave respectfully and mindfully – supporting the development of the city and its individual neighborhoods.
- **QUALITY OF EXPERIENCE:** A city that successfully aligns the needs of residents and visitors, that uses tourism to generate new qualities also changes the way guests experience it: at least for the duration of their stay, they are transformed from the role of pure consumers to part of life in the city.

These three qualities are conditional on and reinforce one another, allowing all of the different stakeholders to benefit from the process. Achieving "optimal quality" in terms of genuinely sustainable development will only be possible if the needs of the different stakeholders – residents and visitors alike – are always taken into account and brought into balance.

And this approach also comes in response to a growing demand: more and more people are showing heightened awareness of the importance of sustainable, responsible and respectful behaviors also on holiday. Guests are increasingly showing an interest in interacting more openly with local identities and ways of life, demonstrating an appreciation of local specialties, handicrafts and culture, and are looking for authentic and inspiring experiences beyond the mass tourism offering.



"WE WANT TO POSITION VIENNA AS AN INTERNATIONAL AND DIVERSE CITY WHERE VIENNESE PEOPLE WILL CONTINUE TO FEEL GOOD."

Stefan Leeb,
Chief Executive Office, City of Vienna

APPROACH

FROM TOURISM TO
VISITOR ECONOMY

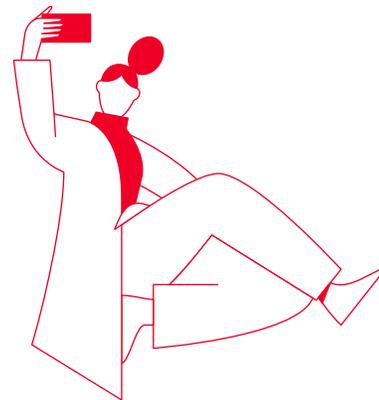
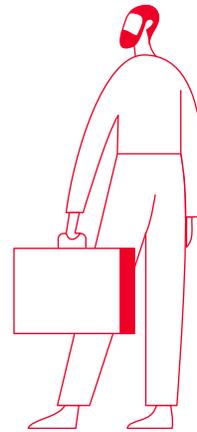


The visitor economy is much more than simply the tourism industry. It extends to interactions between visitors and the city, and all of the direct and indirect effects triggered by visitors.

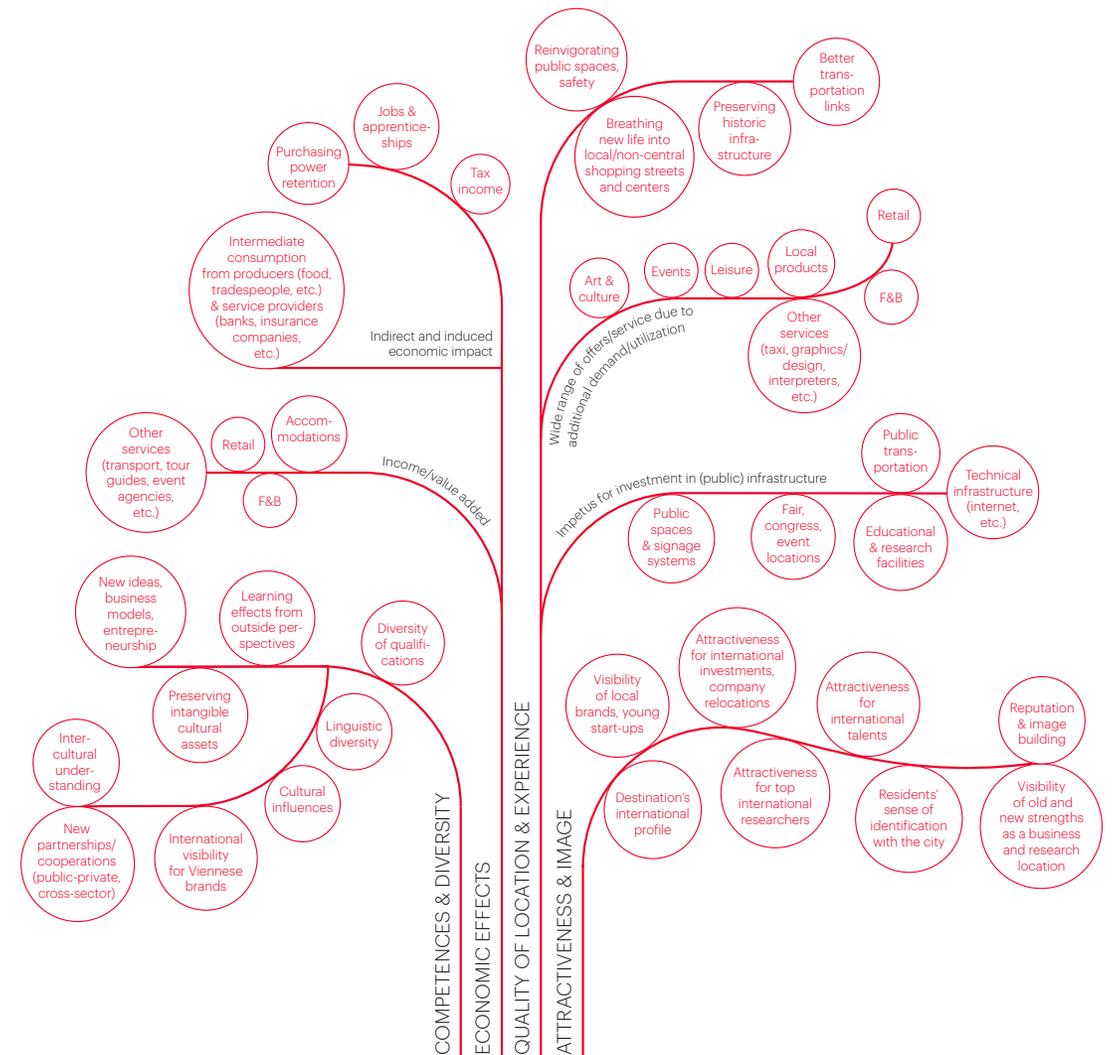
Visitors are conventional leisure guests who come to Vienna for a long weekend, as well as daytrippers who spend the day shopping or going to museums in Vienna; the term also applies to business travelers and congress participants. The visitor economy goes one step further: visitors are all of the interim citizens, or “temporary Viennese” who are studying in Vienna for the time being, or working or living in the capital for a limited time as employees of international companies or organizations. Conversely, local residents often use Vienna in similar ways to visitors, when they go and see the sights or simply head into the city to take a stroll.

Visitors

- Visitors add value by staying overnight in the city, through their behavior as consumers and by using services.
- Visitors mean increased diversity and enrich life in the city by bringing young talent, new ideas, a wealth of language skills, cultural influences and entrepreneurial mindsets.
- Visitors fill the city’s streets and squares with life, making them safer as a result.
- Visitors induce investment in infrastructure, attractions and services, which all of the city’s residents benefit from.
- Visitors strengthen and energize Vienna, and boost its standing as a globally-networked business destination.
- Visitors advance Vienna’s status as a research hub and place of scientific exchange, bolstering the location’s visibility and specific strengths.
- Visitors secure and create jobs – tied to the location, throughout the year and at all levels of expertise.
- Visitors generate additional demand and fuel the diversity of local facilities and offerings: virtually none of the city’s museums would survive without international visitors.
- Visitors help to identify blind spots and foster the development of the destination with their special outside perspective.
- Visitors are – once they leave or move on – the best ambassadors for Vienna’s qualities.
- Visitors represent an integral component of a fully-functioning urban economy.

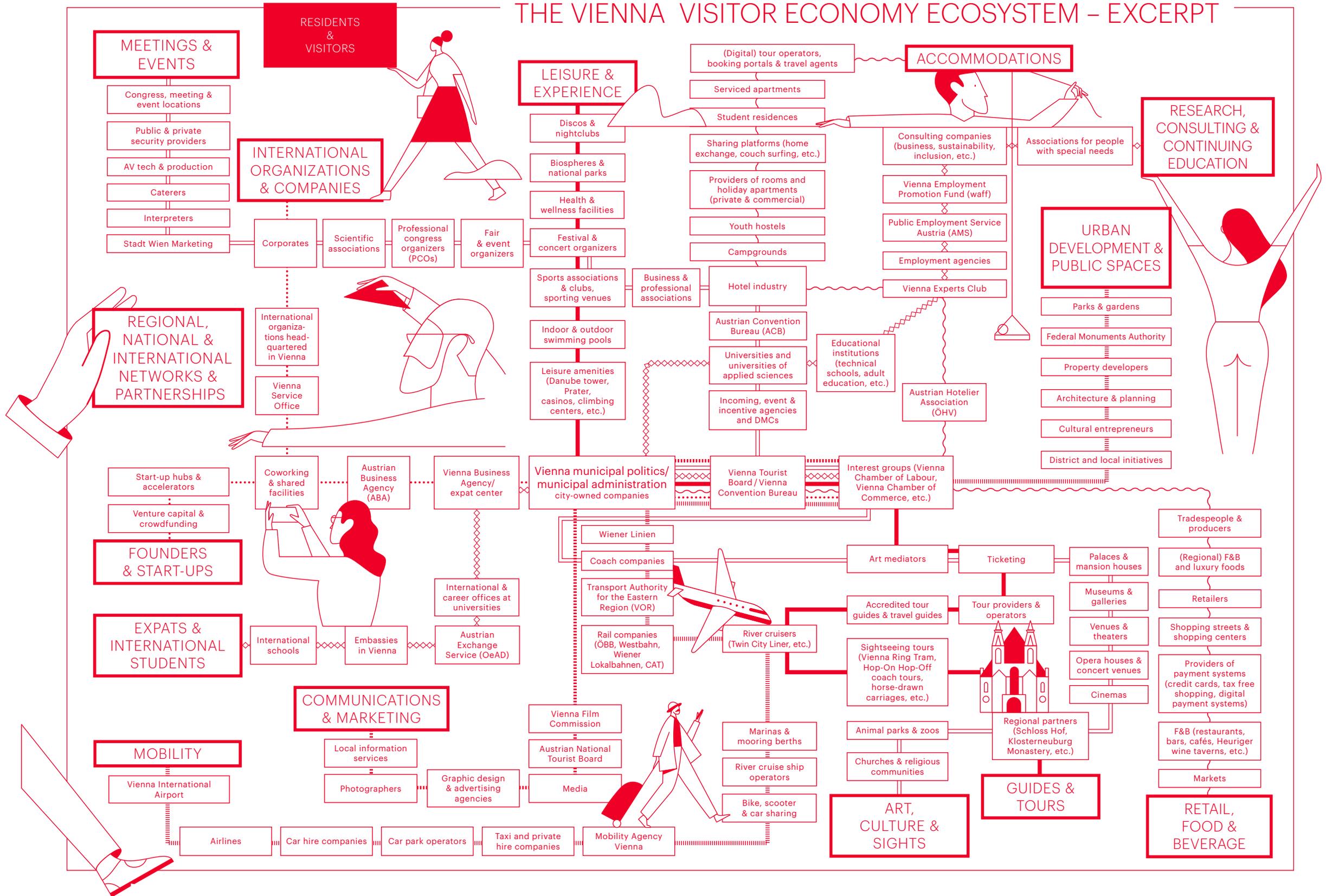


How does the visitor economy have an impact?



The ecosystem is as diverse as the visitors themselves, and is populated by all those who interact with guests and temporary citizens, who are embedded in the visitor economy value chain and play a key role in shaping the visitor economy as stakeholders in it.

THE VIENNA VISITOR ECONOMY ECOSYSTEM – EXCERPT



APPROACH

Forward-looking destination management and marketing

The visitor economy approach calls for a new look at the interplay between the city and visitors, as well as new measures and forms of cooperation between all of the various players:

- **CREATING OFFERINGS FOR EVERYONE:** Designing offerings that appeal to visitors and residents in equal measure instead of putting up Potemkin villages that offer little in the way of added value for the city.
- **ESTABLISH THE VISITOR ECONOMY AS A PARTNER TO URBAN DEVELOPMENT:** Taking visitors' needs into account when it comes to city planning processes and delivering public services.
- **OFFER INFORMATION SERVICES AND GUIDANCE:** Establishing services that visitors and temporary citizens in particular can use to better orient themselves and participate in the life of the city.
- **ANCHOR THE VISITOR ECONOMY THROUGHOUT THE CITY:** Development of attractive offerings that extend to all parts of the city. To better distribute the positive effects of the visitor economy and avoid localized stress factors.
- **SAFEGUARD THE QUALITY OF PUBLIC SPACES:** Protecting them from private transportation which fails to take pedestrians and cyclists into consideration, from misappropriation through excessive street trading or transportation such as bicycle taxis, Segways or electric scooters, and from downmarket sales kiosks of all kinds. Public spaces need to be quality areas where residents and visitors can spend time, move freely and interact with one another.
- **KEEP AN EYE ON CAPACITIES AND THEIR LIMITS:** Shaping growth calls for anticipating strains and overloading in good time, drawing up solutions, extending capacity and qualities in all areas of the ecosystem, carefully managing resources and raising awareness among visitors.
- **JOINED-UP DESTINATION MARKETING:** In destination marketing, the task is to work with all partners in the ecosystem to define specific focuses. This means above all identifying the people traveling to Vienna who will engage with it most 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. To achieve this, existing marketing activities must be constantly reviewed and economic criteria must be further enriched by qualitative dimensions when defining target groups. This extends to how people travel to the city, the amount of time they stay in Vienna, and to visitor and consumer behavior upon arrival. With this in mind, offerings that drive the phenomenon of unchecked mass tourism will not be promoted or marketed.

"INTERNATIONAL GUESTS DO US VIENNESE GOOD BECAUSE THEY FORCE US TO LOOK BEYOND THE END OF OUR OWN NOSES."

Dagmar Moser,
Lichterloh, Furniture Design

"ART AND CULTURE OPEN UP NEW PERSPECTIVES. WE HAVE TO OPEN OURSELVES UP EVEN MORE, SO THAT WE ARE NOT JUST OFFERING ATTRACTIONS THAT APPEAL TO TOURISTS BUT ALSO ENABLE VIENNESE PEOPLE TO ENGAGE WITH A DIVERSE AND THRIVING ART AND CULTURAL SCENE."

Magdalena Höbarth,
mumok – museum of modern art

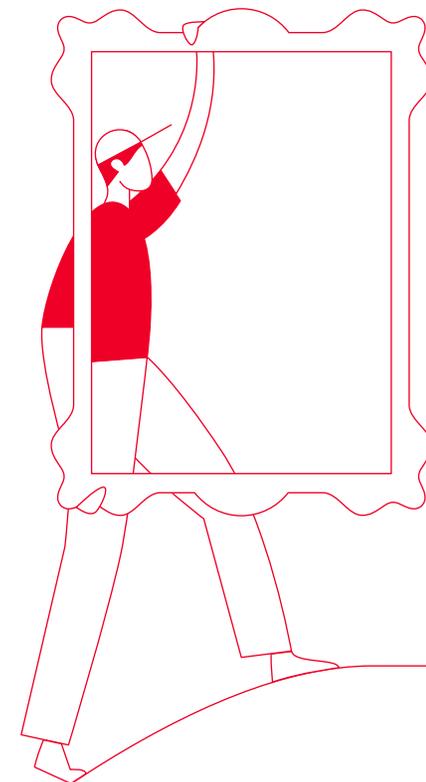
"LIVING TOGETHER IN A GLOBAL CAPITAL IS A DAILY QUESTION OF GIVE AND TAKE. THE FREEDOM PROMISED BY VIENNA GIVES RISE TO FRESH IMPETUS AND ALLOWS BUSINESSES TO GROW. VESTED INTERESTS ALWAYS HAVE TO BE WEIGHED UP AGAINST THE COMMON GOOD. WHERE DEVELOPMENTS ARE A SIGNIFICANT HURDLE TO ECONOMIC, ENVIRONMENTAL OR SOCIAL SUSTAINABILITY, RULES AND INTERVENTION ARE NEEDED."

Norbert Kettner,
Managing Director, Vienna Tourist Board



OBJECTIVE

BUSINESS ADDED VALUE &
CITY ADDED VALUE



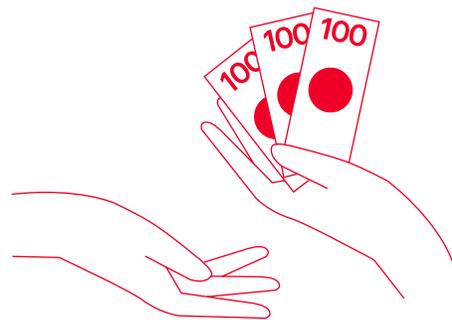
Vienna is committed to growth. But the kind of sustainable and quality growth that adds value in accordance with our vision. By 2025 visitors and residents should reap even more benefits from the visitor economy – a win-win-win situation for locals, visitors and businesses located in the city.

The key objective of the Visitor Economy Strategy 2025 is:

THE VISITOR ECONOMY ADDS VALUE – BUSINESS ADDED VALUE FOR COMPANIES AND CITY ADDED VALUE FOR THE CITY AND ITS RESIDENTS.

We will measure how successful we are in achieving this core objective using six key performance indicators (KPIs), which cover various aspects of this added value:

1. **Direct and indirect economic impact** induced by tourism in Vienna⁴ will increase from EUR 4 billion in 2018 to EUR 6 billion by 2025.
2. **Net revenue from overnight stays generated by the Vienna accommodation industry** – a core sector of the visitor economy – will increase from close to EUR 900 million in 2018 to EUR 1.5 billion by 2025.⁵
3. **Quality of experience for guests** remains high: 9 out of 10 visitors would recommend Vienna as a destination.⁶ The aim is to retain this outstanding value.
4. At the same time, 9 out of 10 local residents confirm that tourism is positive for Vienna.⁷ This impressive **backing from the population** is a key benchmark for us, and one which we wish to uphold in spite of increased visitor numbers.
5. Responsible use of natural resources will be firmly anchored in the consciousness of all the stakeholders in the visitor economy in 2025. The number of businesses in the capital's leisure and tourism sector **certified according to the Austrian ecolabel "Österreichisches Umweltzeichen"** will double compared with 2018.⁸
6. Visitors, particularly those from nearby markets, are increasingly choosing **environment-friendly transportation**, which reduces their carbon footprint: by 2025 the goal is to reverse the proportions of visitors who arrive by car (currently 26%) and by rail (21%).⁶



"THE VISITOR ECONOMY IS A SIGNIFICANT ECONOMIC FACTOR. IT ADDS VALUE, CREATES JOBS AND UNDERPINS THE POSITIVE DEVELOPMENT OF THE CITY – IT ENRICHES LIFE FOR THE PEOPLE IN VIENNA."

Peter Hanke,
Executive City Councilor of Finance,
Business, Digital Innovation
and International Affairs
President, Vienna Tourist Board



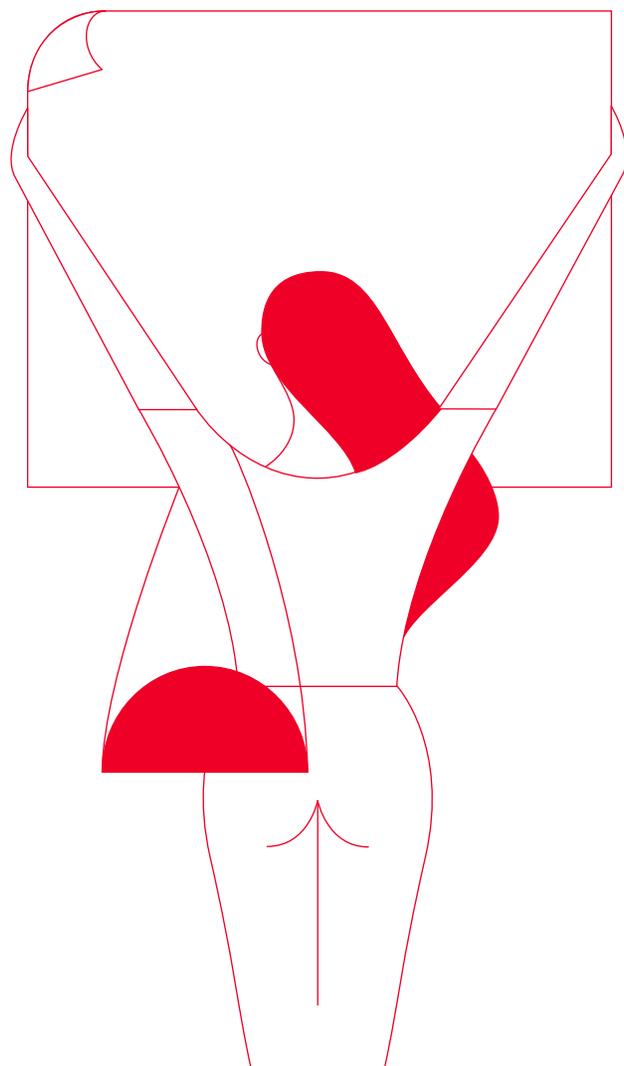
⁴ Statistics Austria/Austrian Institute of Economic Research Vienna (Wifo) – Tourism Satellite Account (TSA for Vienna): As not all of the necessary data for the year under review are available, the latest VGR data (2017) or other sources have been used and extrapolations made based on them. (http://www.statistik.at/web_de/statistiken/wirtschaft/tourismus/tourismus-satellitenkonto/)

⁵ Municipal Department 23 – Economy, Labor and Statistics, Municipal Department 6 – Accounting Services, Duties and Charges, own calculations

⁶ Vienna visitor surveys conducted by Tourismus Monitor Austria (T-MONA)

⁷ Vienna Tourist Board, independent survey conducted with Manova

⁸ According to the 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 hotel industry/camping, F&B (incl. event, catering and party service), meetings and event venues and museums.



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

REDUCED
ENVIRONMENTAL
FOOTPRINT ⁽⁵⁾
of visitors from
nearby markets



2018 car more than rail
2025 rail more than car

VISITOR
SATISFACTION ⁽⁵⁾⁽⁷⁾
Visitors would
recommend Vienna



2018 = 2025
9 out of 10 visitors

RESIDENT
SATISFACTION ⁽⁶⁾⁽⁸⁾
Tourism is positive



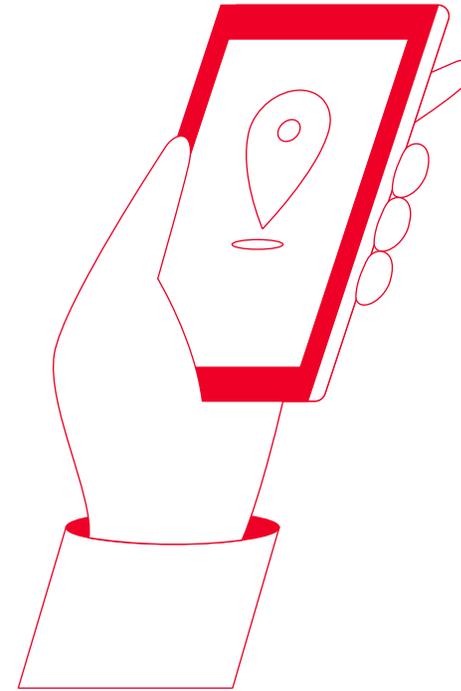
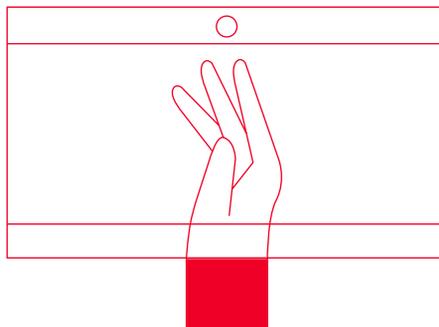
2018 = 2025
9 out of 10 Viennese

- (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

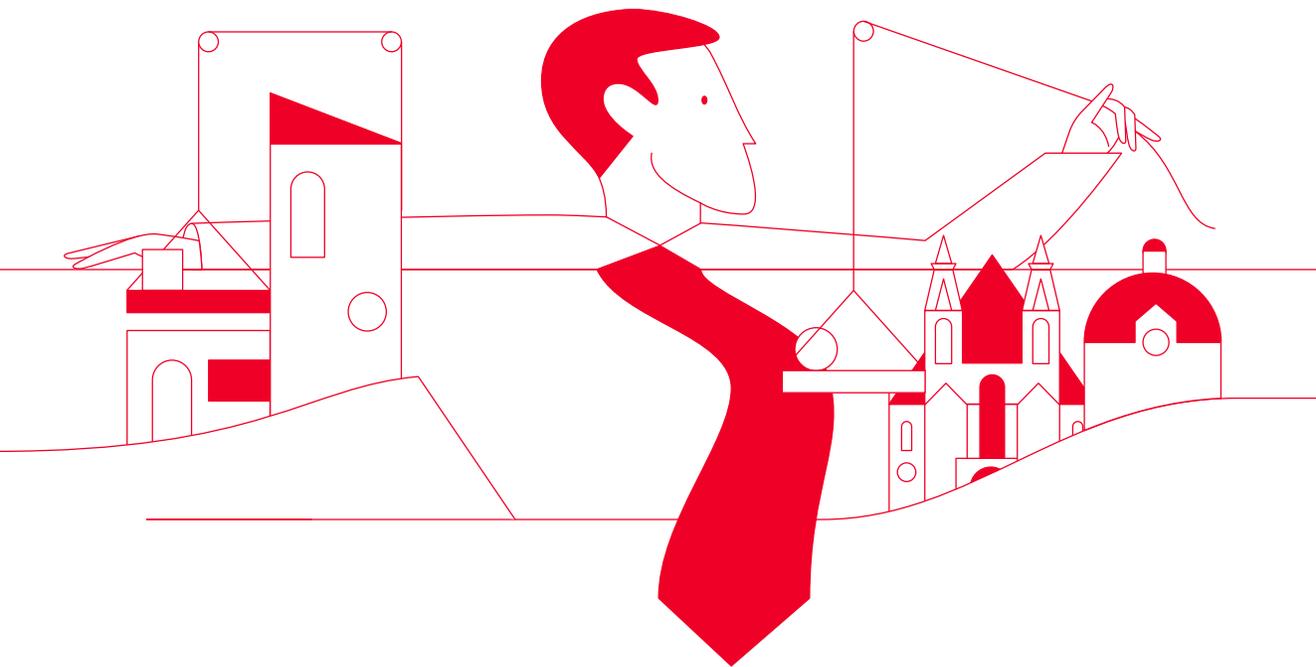
Precise monitoring

Ambitious targets call for careful monitoring so that successes and action areas can be flagged up. The Vienna Tourist Board will deliver regular reports detailing progress in all of the strategy's KPIs. A wealth of data is already available, the scope of which will be extended in future. Through digital data and applications, and the use of new monitoring tools it will be possible to better illustrate the wide-ranging induced impact of the visitor economy and its distribution within the city. The following represents a sample of monitoring instruments and data available:

- Bednight and revenue statistics from the Viennese accommodation industry⁹
- Tourism Satellite Account for measuring direct and indirect economic impact¹⁰
- Visitor surveys (proportion of first-time and returning visitors, means of transport used by incoming visitors, recommendation rates for the destination, etc.)¹¹
- Study on attitudes to tourism among the Viennese population¹²
- Life and Quality of Life in Vienna study¹³
- Vienna Meetings Statistics (number and participant totals for congresses and business events)¹⁴
- Benchmarking analyses with European cities (European Cities Marketing)¹⁵
- TourMIS database of national and international tourism statistics¹⁶
- International city rankings¹⁷
- Revenue per available (hotel) room (RevPAR)⁹
- Seasonality of visitor overnights and arrivals¹⁸
- Occupancy/hotel rooms and beds¹⁸
- Congress Study¹⁹
- PLANNED: Participation in the Global Destination Sustainability Index²⁰
- PLANNED: Sustainability report for Vienna as a destination
- PLANNED: Number of Viennese businesses certified in accordance with the Austrian ecolabel "Österreichisches Umweltzeichen"²¹
- PLANNED: Analysis of movements of Vienna guests in cooperation with the City of Vienna
- PLANNED: Measurement of tourism employment effects & development¹⁰



- ⁹ Municipal Department 23 – Economy, Labor and Statistics, Municipal Department 6 – Accounting Services, Duties and Charges, own calculations
- ¹⁰ Statistics Austria/Austrian Institute of Economic Research Vienna (Wifo) – Tourism Satellite Account (TSA)
- ¹¹ Vienna visitor surveys conducted by Tourismus Monitor Austria (T-MONA)
- ¹² Vienna Tourist Board, independent survey conducted with Manova
- ¹³ City of Vienna research project in cooperation with the University of Vienna's Department of Sociology, organized with the support of Municipal Department 18 (administrative office of the expert committee)
- ¹⁴ Vienna Meetings Industry Statistics
- ¹⁵ European Cities Marketing, European Cities Marketing Benchmarking Report 2018–2019 (www.europeancitiesmarketing.com/ecm-benchmarking-report)
- ¹⁶ Tourism marketing information system TourMIS (<http://www.tourmis.info/>)
- ¹⁷ Mercer Quality of Living Survey, EIU Liveability Ranking (Economist Intelligence Unit), Quality of Life Survey (Monocle), ICCA (International Congress and Convention Associations), UIA (Union of International Associations), State of the World's Cities (U.N. Habitat)
- ¹⁸ Municipal Department 23 – Economy, Labor and Statistics, own calculations
- ¹⁹ Vienna Convention Bureau/economic analysis based on the model developed by Dr. Martina Stoff-Hochreiner of the Vienna University of Economics and Business
- ²⁰ Global Destination Sustainability Index (www.gds-index.com)
- ²¹ Austrian Federal Ministry for Sustainability and Tourism



Our values:

Premium

Cosmopolitan

Digital

Three core values provide orientation when formulating our vision, implementing the strategy and designing activities and measures – and shape our self-image as a destination. These take the three basic principles of the 2020 Vienna Tourism Strategy – Global. Smart. Premium – as their starting point.

“THE STREETS OF VIENNA ARE PAVED WITH CULTURE, THE STREETS OF OTHER CITIES WITH ASPHALT.”

Karl Kraus

“THE ONLY THING THAT IS ELITIST ABOUT OPERA IS THE QUALITY, THE AUDIENCES THAT COME EVERY DAY REPRESENT A BROAD CROSS-SECTION OF SOCIETY.”

Dominique Meyer,
Director, Vienna State Opera House

THE UNIVERSITY OF MUSIC AND PERFORMING ARTS, VIENNA (MDW) WAS VOTED THE WORLD’S BEST MUSIC UNIVERSITY ALONGSIDE THE JULLIARD SCHOOL IN NEW YORK.

Source: 2019 QS University Ranking

EVERY NIGHT AROUND 10,000 MUSIC FANS ARE TREATED TO LIVE CLASSICAL MUSIC IN THE CITY. EACH YEAR AROUND 20 MILLION PEOPLE VISIT VIENNA’S CULTURAL FACILITIES.

Source: Kurier, Stadt Wien (Kultur & Freizeit)

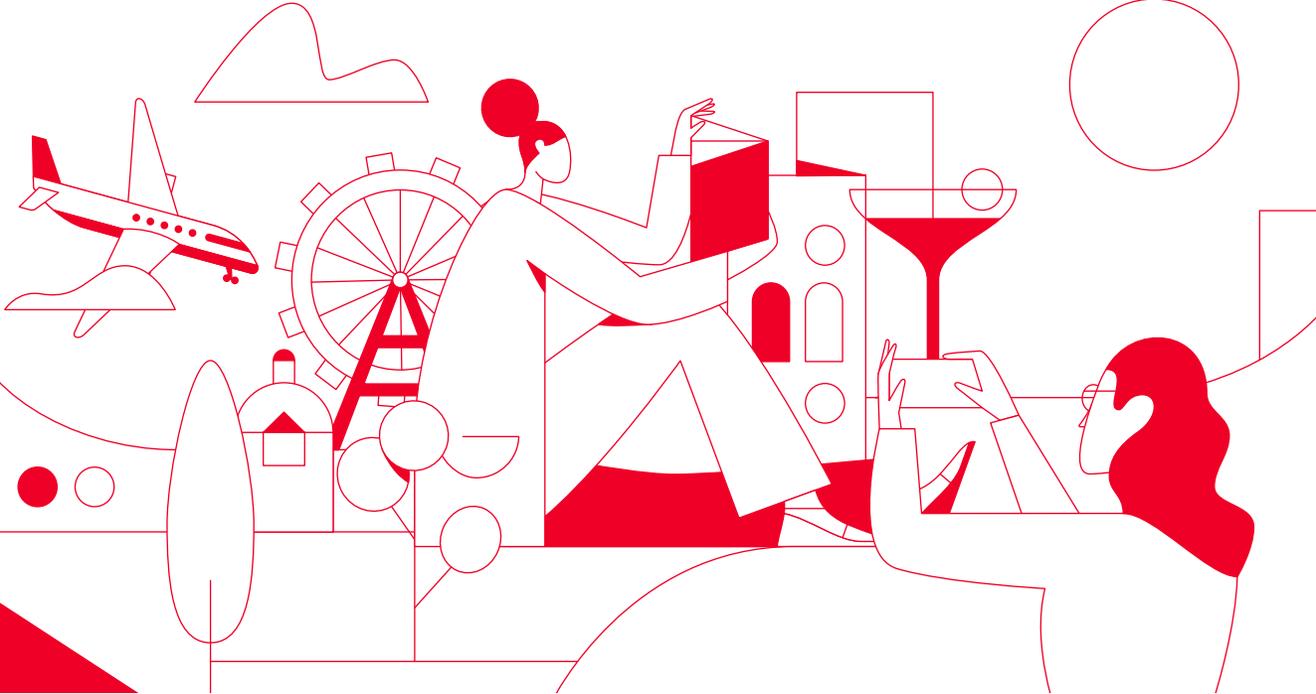
PREMIUM FOREVER

Vienna sets standards

The meaning of Premium Forever is twofold: in one sense, the visitor economy builds on Vienna’s premium qualities and raises awareness of them internationally: the city’s beauty; its cafés and restaurants, shops, green spaces and a cultural offering that caters to a wide range of different tastes; excellent drinking water and clean air; its safety record, cleanliness, etc. In another, the premium qualities of the location are boosted by the visitor economy itself. Premium extends to all of the offerings that all stakeholders benefit from: people who have had Vienna at the center of their lives for a long time, expats and students who spend parts of their studies in Vienna, or visitors who spend only a few days or hours in the city. And last but not least Viennese businesses and residents. Premium forever stands for high quality standards in all price segments – from opera performances to free film festivals and from award-winning restaurants to sausage stands. The people who come to Vienna are those who appreciate these qualities and high standards. As a rule, this results in a respectful approach to the city. Premium quality is one of the keys to sustainable development. And satisfied guests become ambassadors for Vienna as a quality destination.

OBJECTIVE





COSMOPOLITAN VIENNA

Modern global capital

Vienna has always been a diverse city: around 50% of its residents have some form of immigrant background. Even in 1900 Vienna was a truly cosmopolitan city: open to different cultural, scientific and philosophical influences; engaged with the rest of the world as a center of international diplomacy; a magnet for people from all over the world. Diversity and an international mindset continue to shape Vienna to this day and cultivate its international standing. Cosmopolitan Vienna means embracing the city's international mindset, the diversity of its residents with their manifold language skills and cultural backgrounds, interests and abilities: Vienna's cosmopolitan character makes it attractive for visitors, while at the same time visitors make their own contribution towards the city's attractiveness by decisively shaping its image and the way that it sees itself.

"VIENNA IS RECOGNIZED AS THE ORIGINAL COSMOPOLITAN CITY IN THE MODERN ERA, OPEN TO TALENT, IDEAS, AND INNOVATIONS IN ORDER TO CREATE THINGS THAT HAVE ENDURING VALUE."

Greg Clark, The Business of Cities, member of the international advisory board

VIENNA IS HOME TO MORE THAN A DOZEN UN ORGANIZATIONS. AROUND 10,000 DIPLOMATS AND EMPLOYEES OF INTERNATIONAL ORGANIZATIONS WORK IN THE CITY.

Source: Vienna Business Agency

WITH AROUND 200,000 STUDENTS, VIENNA IS THE LARGEST UNIVERSITY TOWN IN THE GERMAN-SPEAKING WORLD.

Source: Municipal Department 23

"PEOPLE WANT TO VISIT A CITY THAT IS SURPRISING, DELIGHTFUL, AND INSPIRING. VIENNA HAS THE RIGHT APPROACH TO COMBINE THE USE OF DIGITAL TECHNOLOGIES WITH RETAINING THE IDEA THAT WHAT IS AT THE HEART, IS THE HUMAN SPIRIT AND HUMAN SCALE OF THE CITY."

Greg Clark, The Business of Cities, member of the international advisory board

VIENNA HAS CLOSE TO 500 WIFI HOTSPOTS OFFERING FREE INTERNET ACCESS – FROM RATHAUSPLATZ TO THE GÄNSEHÄUFEL LIDO AND CENTRAL CEMETERY.

Source: Municipal Department 33

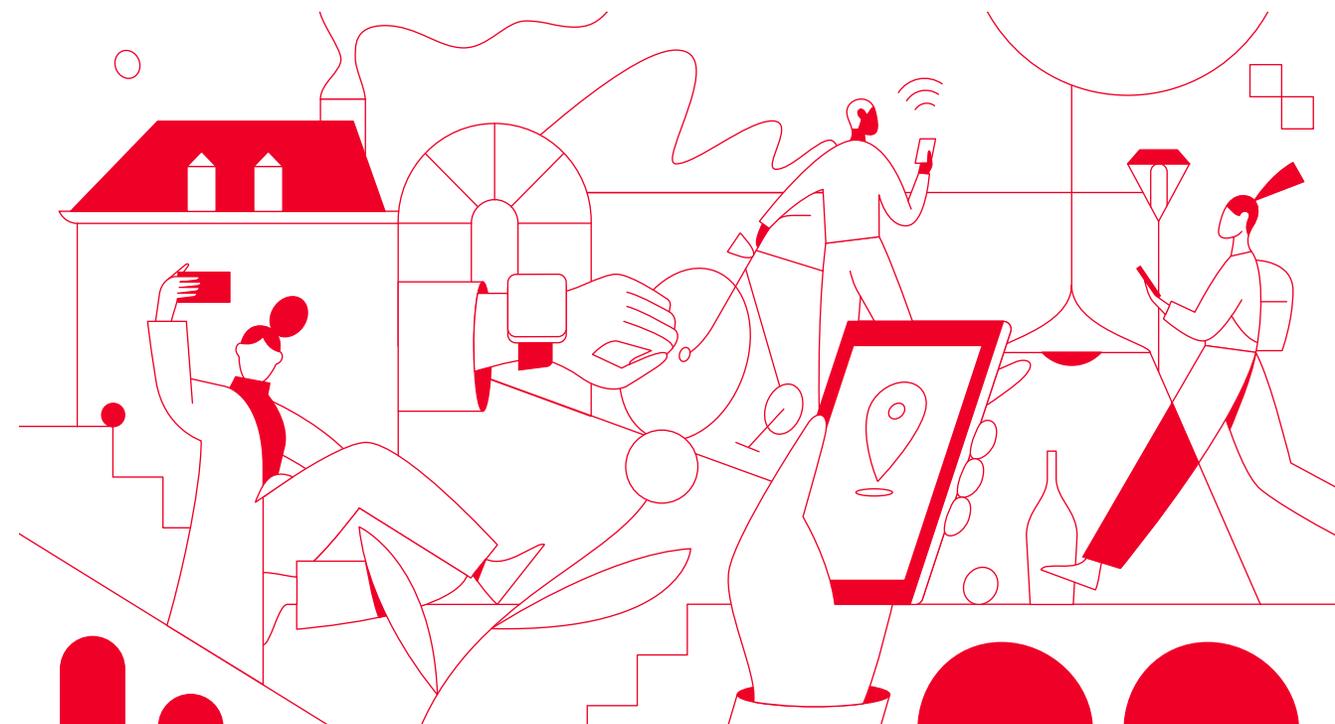
THE VIENNA STATE OPERA OFFERS TABLETS FOR EACH SEAT THAT DISPLAY SUBTITLES – IN EIGHT LANGUAGES.

Source: Vienna State Opera

DIGITAL, WHAT ELSE!

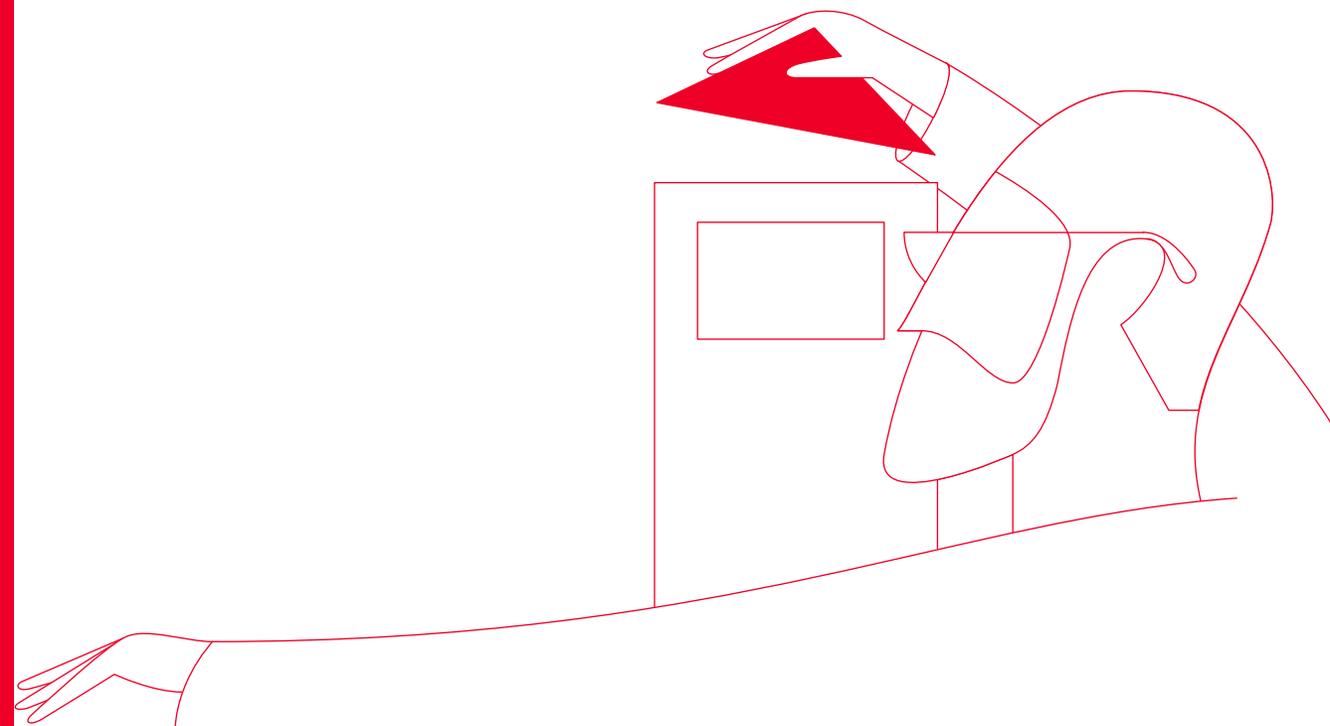
Digital humanism

Nowadays, digital applications accompany us along the entire "visitor journey" – from inspiring the choice of destination and reserving online to sharing travel experiences on social media. Digital data allow us to build up a comprehensive picture of the capital and to see how visitors and residents use the city and where they run into obstacles – a key prerequisite for expanding the visitor economy to the rest of the city, defusing stress situations and intelligently combining offerings. Digital technologies bring advantages that were still unheard of only a short time ago – but there is still something that they cannot replace: individual travel experiences and real-life encounters and interactions. We see digitization as a cultural technique which delivers benefits for people and have the potential to enhance autonomy and personal choice – in the background and in a user-friendly and appealing way. Vienna wants to adopt a relaxed approach to digital services and encourage people to escape from their digital bubbles and do what makes travel unique in the first place: discovering a city on their own initiative, discovering genuinely new and surprising things and interacting with residents.



COMMON AGENDA

FROM STRATEGY
TO ACTION



The entire ecosystem that constitutes Vienna's visitor economy is called upon to turn our jointly-formulated vision into reality and ensure that we achieve the goals we have set ourselves. Depending on the specific topic and remit, the City of Vienna, other stakeholders in the visitor economy and the Vienna Tourist Board will themselves play a (leading) role in implementing the various aspects. Similarly to a rowing competition, successful realization of the strategy calls for careful distribution of roles and responsibilities, and for all involved to work together efficiently – inspired by the principle of “rowing – steering – coaching – cheering”:



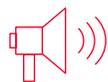
- **ROWING:** Each of the activities planned requires stakeholders who are prepared to get involved, act on their own accord using their own resources – not just to simply initiate one-off projects and measures, but to drive them forward consistently and autonomously.



- **STEERING:** Implementing the Visitor Economy Strategy requires strategic management, while every single specific initiative needs its own driving forces that set the direction, bring the right partners to the table and take ownership of decisions in times of doubt.



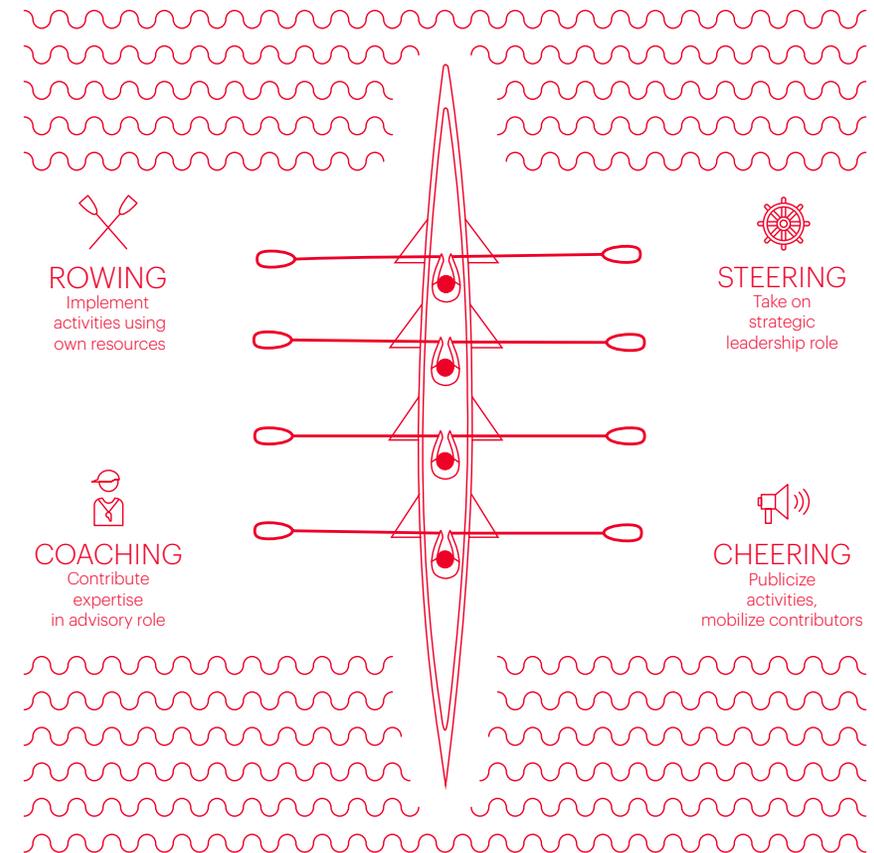
- **COACHING:** When implementing the strategy, the challenge is to generate impetus for new initiatives and develop innovative approaches while setting – and safeguarding – high quality standards. The far-ranging expertise of the Vienna Tourist Board and numerous other stakeholders in the city's visitor economy ecosystem are an important basis for this.



- **CHEERING:** The more visible successful initiatives are, the more interest they will attract, generating additional momentum for activities. Celebrating and publicizing successful initiatives will motivate others in the ecosystem and bring them into action.

Roles in the visitor economy

ROWING ANALOGY



Implementation of the Visitor Economy Strategy 2025 centers on three core action areas:

Place Making & Place Marketing

Meeting Destination Vienna

Smart Solutions



PLACE MAKING & PLACE MARKETING

Creating new experiential spaces

In Vienna, the lion's share of tourist amenities – from accommodations to places on cultural itineraries, and destinations for shopping and eating out – are clustered around the city center. However, the capital is brimming with countless other attractive neighborhoods, each with their own unmistakable character and charm, which could benefit from additional demand and stimulation from visitors. So it is time to raise awareness of and develop experiential spaces outside the central tourism zone.

- **PLACE BRANDING & MARKETING – A REGIONAL ROADMAP FOR VIENNA:** Development of a branding and marketing concept for central and outer parts of the city, with different profiles for each. The concept defines focus topics including landmarks, transport nodes and axes of movement to distinguish and draw attention to “new destinations within the destination” and establish a link between them.
- **DIGITAL MAP OF VIENNA'S VISITOR ECONOMY:** In line with the regional concept, a new digital map that transcends the borders between the individual districts will bring the different parts of Vienna and their distinctive features and various attractions into focus while providing useful tips. The Vienna Tourist Board will incorporate creative ideas and future projects in the districts, from local initiatives, companies serving the visitor economy and experts from the fields of urban planning, architecture, culture, design and communication.

“WHAT WE ARE EXPERIENCING RIGHT NOW IS A GENUINE SEA CHANGE IN MOBILITY, WHICH WILL CHANGE THE CITY: WE WILL HAVE FEWER CARS WITH QUIETER ENGINES AND WITHOUT THE STENCH OF EXHAUST GASES – AND SIGNIFICANTLY MORE PEOPLE WILL WALK, RIDE BIKES AND SCOOTERS, SKATE OR TAKE PUBLIC TRANSPORTATION. WHICH IS WHY NOW IS THE TIME TO INVEST IN A LUXURY HOTEL ON THE GÜRTEL, VIENNA'S NEXT SHOWPIECE BOULEVARD!”

Katja Schechtner,
OECD, MIT, member of the international
advisory board

“IT TAKES COURAGE FOR THE CITY TO OPEN THE DOOR TO NEW DEVELOPMENTS, TO CREATE ATTRACTIVE LOCATIONS OUTSIDE THE GÜRTEL.”

Marijana Stoitsits,
Vienna Film Commission

“WHAT WE NEED IS VIVACIOUS, AUTHENTIC, LOCAL HOTELS WITH A SOUL AND AN UNMISTAKABLE CHARACTER OF THEIR OWN. HOTELS COULD BECOME MEETING PLACES FOR THE VIENNESE AGAIN LIKE THEY WERE IN THE 1920S AND 1930S; AND HOTEL GUESTS WILL BE HAPPY TO COME INTO CONTACT WITH THE LOCAL POPULATION AND NOT JUST OTHER GUESTS.”

Michael Widmann,
PKF hotelexperts

VIENNA IS THE ONLY MAJOR CITY IN THE WORLD WITH A NATIONAL PARK WITHIN THE CITY LIMITS: THE DONAU-AUEN NATIONAL PARK.

Source: *Perspektiven, Nationalpark Donau-Auen, 1995*

55% OF VISITORS TO VIENNA ARE RETURNING GUESTS – CULTURAL OFFERINGS OUTSIDE THE CITY CENTER, AWAY FROM THE MAIN ATTRACTIONS, ARE OF PARTICULAR RELEVANCE TO THIS GROUP.

Source: *Vienna visitor surveys conducted by Tourismus Monitor Austria (T-MONA)*

- **PLACE MAKING & MANAGEMENT:** Creation of attractive experiential spaces that offer a high quality of stay for residents and visitors through: upgrades to public spaces, careful design of places for people to take a stroll, traffic-calmed zones with a focus on pedestrians and cyclists, improving the usability of the Danube Canal and the Danube banks, attractive restructuring of new urban development areas and neighborhoods outside the city center – in partnerships with Vienna's urban planners and districts.
- **PRIORITY FOR PEDESTRIANS AND PUBLIC TRANSPORTATION:** The days of building cities around cars are over. Spaces that are car-free or have traffic-calming measures in place, pedestrianized zones and areas where all users share the streets show how things can be better – delivering a significant increase in the quality of stay for all concerned, fostering an environment where people are sensitive to the needs of others, with less stress and fewer accidents. The proportion of journeys taken in the capital by car – already relatively low – still needs to decline further.
- **SAFEGUARDING PUBLIC SPACES:** Public spaces – i.e. streets, squares and parks – are a valuable and limited commodity. Hotly contested in terms of usage, they must be protected and put to practical use. This involves creating attractive places to sit and watch the world go by, the introduction of clear rules for the various modes of transportation on public spaces (e-scooters, Segways, etc.) and the introduction of measures to regulate runaway street trading.
- **URBAN HOTSPOTS – EVENT VENUE AND BUS TERMINAL:** The new event venue in the area of Neu-Marx and the international bus terminal planned for the Ernst Happel Stadium represent two major investments for the future that have a clear bearing on Vienna's visitor economy. They are a unique opportunity to use state-of-the-art infrastructure as the point of departure for the development of attractive new quarters and add new hotspots for Vienna as a destination.
- **OPPORTUNITY FOR SUBSEQUENT USE OF WIENER STADTHALLE:** The pending new usage concept for Wiener Stadthalle (multi-purpose indoor arena and convention center) brings an opportunity to use this heritage-listed building as the starting point for creating a new urban hotspot in Vienna.
- **PROMOTING HOTELS AS NEIGHBORHOOD MEETING PLACES:** Hotels and new forms of accommodation have the potential to do much more than provide a place to stay and somewhere to eat for visitors to the city – they enrich the neighborhoods around them: through interesting architecture and innovative F&B formats, through coworking spaces, meeting rooms and collaborations with local businesses, through galleries and cultural offerings or simply because they offer cozy or chic bars, cafés, lounges, bakeries, etc. – and in many cases 24 hours a day, seven days a week.
- **FILMING IN VIENNA – PUTTING FAMOUS AND LESSER-KNOWN LOCATIONS CENTER STAGE:** Films and series for cinema, TV and internet streaming have enormous advertising value for Vienna, cleverly present locations that are off the beaten track and reach a wide audience. Targeting international productions that also draw the spotlight on to Vienna as a destination is a good investment and form of cultural promotion that will raise the visibility of the city in new ways all the time.

MEETING DESTINATION VIENNA

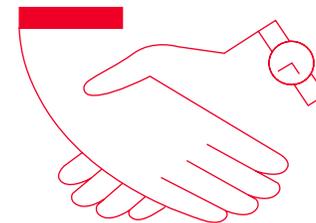
Congresses and business events to leverage development

Vienna has an international reputation as a center for political dialog and a hub where the latest scientific findings are shared. As a location for congresses and meetings, Vienna is one of the most sought-after destinations worldwide. Congress and business events are not only a core element of the city's visitor economy. Used strategically, they are also important for leveraging the wider economy: once they have established themselves, key events such as flagship fairs and congresses turn into magnets that draw the industries of the future to the city, setting in motion numerous other effects – such as attracting additional conventions and meetings, and new start-ups, as well as raising the international profile of the business location's specific competence centers in their particular fields.

- **VIENNA AS A MEETING DESTINATION – ANALYSIS OF POTENTIAL AND STRATEGIC FOCUS:** Under an alliance between location policy makers and business development agencies the new Vienna 2030 – Business and Innovation location strategy was written. In this paper strategic ties between Vienna's meetings industry and specific key industries with a presence in Vienna were defined for the first time. Further development of a set of tools to provide incentives to congresses and events with USP potential that are categorized under the lead topics defined for Vienna will contribute towards the implementation of the location strategy.

"VIENNA AS A MEETING AND EVENT DESTINATION UNDENIABLY HAS IT ALL: A COHERENT PROPOSITION FOR MEETINGS AND EVENT ORGANIZERS AND A TRULY APPEALING OFFER FOR THOSE ATTENDING."

Ben Goedegebuure,
Maritz Global Events, member of the
international advisory board



- **SIGNATURE EVENTS IN VIENNA:** In cooperation with local stakeholders, key events in the target industries will be identified and acquired, or new high-visibility proprietary events such as congresses and flagship fairs will be established in Vienna. Important: in-depth analysis of international demand in terms of program elements, space requirements, hotel room allotments, technical equipment and image factors.
- **CONCEPT AND STRATEGIC POSITIONING FOR THE MEETING DESTINATION VIENNA BRAND:** Development of a newly-defined destination brand for the business events industry under an overarching Vienna brand strategy. The main steps towards achieving this goal include: evaluating international perceptions of Vienna as a meetings destination, positioning the Meeting Destination Vienna brand, putting together a tool box for joined-up storytelling to be used by everyone involved and balanced development of international networking measures, appearances at fairs and exposure of the Meeting Destination Vienna brand on online platforms.
- **VIENNA MEETING VENUES – UPGRADES AND SAFEGUARDING QUALITY:** No growth without the necessary investment in safeguarding the quality of the offering! This applies to existing meeting venues which have to be constantly aligned to the needs of the future (flexible layouts, digital infrastructure, etc.), as well as to new event spaces and equipping and embedding them in the local environment. This involves a comprehensive analysis of gaps in the current offering as well as strategic consideration of the development of the business destination through to 2030. Current works to expand and remodel the Austria Center Vienna and measures for the proposed modernization of the Messe Wien site will play a prominent role in this development.
- **VIENNA AS A MEETINGS HOST – PREMIUM SERVICE FOR EVENT ORGANIZERS:** Vienna is seen as a meeting destination which is characterized by outstanding reliability and quality of service – an asset that requires constant optimization. This applies to uninterrupted personal support for event organizers when it comes to preparing and hosting meetings, helping international colleagues to navigate bureaucratic hurdles via a central service point and setting up interfaces with local businesses and residents (e.g. to simplify processes to implement outreach activities and improve the visibility of congresses and events hosted in the city).

VIENNA HOSTS BETWEEN 4,000 AND 5,000 CONGRESSES, CORPORATE EVENTS AND INCENTIVES EACH YEAR, MAKING IT ONE OF THE MOST IN-DEMAND MEETING DESTINATIONS IN THE WORLD. INCIDENTALLY: ACCOUNTING FOR JUST 21% OF ALL MEETINGS, INTERNATIONAL CONGRESSES CONTRIBUTED MORE THAN 80% OF INDUCED GDP AND TAX INCOME.

Source: Vienna Meetings Industry Report

CLOSE TO 50% OF CONGRESS PARTICIPANTS IN VIENNA ARE FEMALE. DOESN'T SOUND ALL THAT SURPRISING? IN 1991 WOMEN ACCOUNTED FOR JUST 20% OF THE TOTAL!

Source: Vienna Meetings Industry Report



SMART SOLUTIONS

Innovation solutions for sustainable development

For Vienna's visitor economy, sustainable development is a question of using natural resources carefully and taking the needs and interests of visitors and residents into account in equal measure. The Visitor Economy Strategy 2025 will play its part in achieving the sustainability goals set out in Vienna's Smart City Strategy and the United Nations' New Urban Agenda. Furthermore, it echoes the World Tourism Organization's (UNWTO) statement on sustainable city tourism declaring that economic growth is compatible with social inclusion and a conscious approach to the environment – underpinning the competitiveness of the Austrian capital in the process.

- **RAIL SERVICE DEVELOPMENT:** Traveling to Vienna accounts for a high proportion of the visitor economy's carbon footprint. Thanks to its location in the heart of Europe, Vienna has a golden opportunity to position itself as the hub for rail connections – particularly sleeper services (night jet hub) – while offering visitors from neighboring countries in particular a sustainable and convenient alternative to short-haul flights – provided the requisite quality is put in place in terms of connections and service.
- **SMART AIR SERVICE DEVELOPMENT:** Realignment of the long-term collaboration between the Vienna Tourist Board and Vienna International Airport in accordance with the city's new Vienna 2030 – Business and Innovation location strategy. Focus: concentrating on long-haul routes and cooperation with network carriers to promote Vienna's function as a hub.
- **BUSMANAGEMENT 4.0:** Digital technologies support the smart management of coaches and shuttle buses in the city, to avoid overcrowding at peak times and guide drivers as efficiently as possible to the most suitable disembarkation points, as well as to terminals and parking facilities. Increased use should be made of eco-friendly modes of transport for short transfers for groups such as cruise ship passengers.
- **VIENNA 360° CONGRESS TICKET:** Development of a comprehensive special offering to encourage congress, fair and meeting attendees to use public transportation – from airport transfers to trips taken in the city.
- **THE NEW VIENNA CITY CARD:** The inclusion of an airport transfer option adds yet another advantage for holders of Vienna's official city card. Next step: Vienna City Card offers are integrated into digital applications (such as a Digital Concierge – see below for details) with new offers and constant improvements following dialog with users.
- **TAXIS AND RENTAL CARS – SERVICE QUALITY AND SUSTAINABILITY:** Regular quality checks and training for taxi and private hire drivers is central to Vienna's target of extending its premium mindset to the passenger transport industry. For ecological reasons, empty taxi runs (e.g. to or from the airport) must be avoided. In addition, sustainable forms of transport including e-vehicles and rail should be promoted.

VIENNA IS THE NATION'S MOST POPULAR SHOPPING DESTINATION FOR NON-EU CITIZENS. MORE THAN 60% OF REVENUE GENERATED BY THIS SEGMENT WAS ACCOUNTED FOR BY THE CAPITAL IN 2018.

Source: Global Blue Austria



- **SMART VISITOR SERVICES AND FAST-TRACK SERVICE FOR TALENTS – QUALITY DRIVE:** Securing well-qualified and highly motivated employees in all areas of the ecosystem; empowering those working in the visitor economy as ambassadors for Vienna's premium qualities through the Vienna Expert Club. There must be a special focus on significantly cutting red tape (rapid, bureaucracy-free and customer-oriented execution and support) when it comes to integrating key workers and talents, and expats and students.
- **COHERENT RESEARCH AGENDA – KNOWLEDGE TRANSFER BETWEEN SCIENCE AND BUSINESS:** Close cooperation with universities, private universities and universities of applied sciences. Vienna's higher education sector represents an enormous asset for the destination thanks to its research expertise; by the same token, Vienna plays a major role as a location for universities. At the start of 2019, the City of Vienna concluded a cooperation agreement with more than 20 universities, private universities and universities of applied sciences to work together on innovative and smart solutions for Vienna and providing a solid foundation for policy. The Vienna Tourist Board and the stakeholders in Vienna's visitor economy support the areas of cooperation set out in the agreement and are committed to actively harnessing the expertise at these research institutions with a view to addressing specific questions related to the destination's sustainable development.
- **QUO VADIS, VISITOR? – BIG DATA ANALYSIS OF VISITOR MOVEMENT STREAMS:** How do residents and expats, leisure, business and congress guests move around the city? Where do they go and what offerings do they use? Under a joint project between the City of Vienna and the Vienna Tourist Board, digital data analysis can deliver new insights where conventional survey tools fall short, creating a joint

picture to deliver a better understanding of how the city works and provide starting points for careful management of flows of visitors and residents.

- **DIGITAL CONCIERGE FOR CITY EXPLORERS (PILOT PROJECT):** In line with the tenets of digital humanism, a Digital Concierge solution will curate individual travel recommendations, serve as a virtual guide and helping hand in the city, and use custom, user-friendly service to transform a trip to Vienna into an unforgettable experience. Companies in the visitor economy can use it to present products and services, histories and useful information about the destination. Visitors put together their personal itineraries and share them via social media; residents can also use the Digital Concierge to discover a different side to their city.
- **YEAR-ROUND OFF-SEASON CULTURAL AND EVENT PROGRAM:** It is not just geographically that Vienna's offering could be better distributed: by getting art and cultural institutions and other stakeholders in the visitor economy to coordinate more closely, the whole year could become high season for events and cultural highlights – cutting overcrowding in peak times for tourism. Online formats can be used to create virtual experiential spaces and simplify access for anyone wishing to engage with cultural life in the city.
- **CERTIFIED SUSTAINABLE:** Hotel classifications need to take more sustainability criteria into account. It is important that accommodations stick to their sustainability goals and that climate protection measures are highlighted through certification. The most important signifiers are the Austrian ecolabel "Österreichisches Umweltzeichen" and the European ecolabel – a uniform symbol awarded to eco-friendly products and services throughout the European market. The city and federal government, the Vienna Tourist Board, the Economic Chamber and the Austrian Hotelier Association provide support and training, and showcase model enterprises.
- **GREEN MEETINGS AND GREEN EVENTS:** Internationally, demand for green meetings and events is on the rise. This trend supports the development of a sustainable business location and is increasingly becoming a question of competitiveness. Green meetings are energy-efficient, low-waste and encourage environment-friendly travel choices to, from and at the destination for guests. Other key considerations include added value for the host region, and social responsibility. Sustainability is a core aspect of Vienna Tourist Board events; the Vienna Convention Bureau acts as a licensing body for event organizers.
- **INTERNATIONAL STANDARDS FOR SHOP OPENING HOURS AND PAYMENT OPTIONS:** Internationally, there is a distinct trend towards flexible opening hours. Vienna must ensure that it does not get left behind. With the support of social partners, the necessary framework has to be put in place to ensure new, flexible opening hours. Cashless payment has long since been an option which can be taken for granted like in other countries – at retailers as well as in gastronomy.
- **SMART ENJOYMENT:** Vienna's agriculture sector and food industry produces high-quality foodstuffs. These need to be featured more prominently in the visitor economy in future, in a move towards encouraging eco-friendly local supply habits and bolstering the local economy. Actively presenting and marketing quality local products will raise awareness among visitors and residents – a key step towards establishing a sustainable mindset.

"SUSTAINABILITY IS THE NEW COMPETITIVENESS."

Zurab Pololikashvili,
Secretary General World Tourism Organization (UNWTO)

"IT IS HARD TO IMAGINE SUSTAINABLE TOURISM WITHOUT A SUSTAINABLE SOCIETY."

Egon Smeral,
MODUL University Vienna

- **LOCAL FLAVORS A MUST – CULINARY VARIETY SHAPES THE CITY:** Vienna is the only city in the world to have a culinary style named after it. A commitment to regionality means making high-quality, sustainably produced local food the default for Viennese cuisine. In addition, a city's restaurant industry also has to offer culinary delights from all over the world. Thus, ready availability of international products, a highly-diverse F&B offering and space for avant-garde experiments where ideas can flourish must also be the goal for a city like Vienna.
- **FAIR SHARING ECONOMY – SERVICES FOR RESIDENTS AND VISITORS:** Sharing instead of owning is the overarching principle of the sharing economy, which offers numerous scenarios that help deliver a sustainable visitor economy. The prerequisites for a fair sharing economy, whether it is accommodations, transportation or any other future applications: clear rules, the same regulations and conditions for everyone offering similar services create a level playing field and are applied consistently.
- **GLOBAL DESTINATION SUSTAINABILITY INDEX:** Vienna has been comparing notes with other cities for many years so that everyone can learn from each other – as affiliate member to the World Tourism Organization (UNWTO) or being part of the World Tourism Cities Federation (WTCF) and European Cities Marketing (ECM). Being part of the Global Destination Sustainability Index²² allows Vienna to benchmark its sustainability performance against more than 50 other cities and improve step by step.
- **WALK THE TALK – STEP BY STEP:** This Visitor Economy Strategy sets out the ambitious vision of a genuinely sustainable visitor economy. It is critical to the strategy's success that every single stakeholder plays an active role in their own spheres of action and influence. As an organization, the Vienna Tourist Board will also live up to its environmental responsibilities and send out a clear signal by initiating activities. In 2020 the first component will start with donations to climate protection measures to offset CO₂ emissions for business trips that have to be taken by plane; at the same time, contemporary travel guidelines will provide an additional incentive to use public transportation.

²² <https://www.gds-index.com/>

PHILOSOPHY

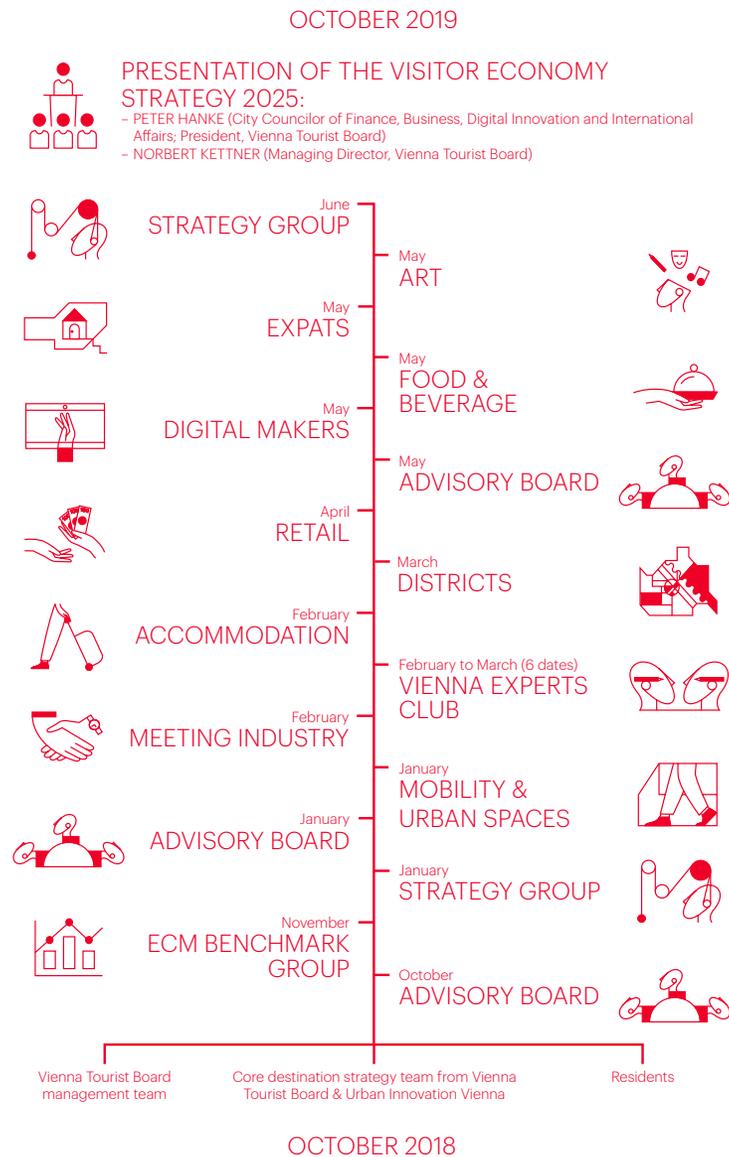
WE ARE ALL PART OF
THE VISITOR ECONOMY!



The Visitor Economy Strategy 2025 is the result of a wide-ranging dialog. In numerous discussion formats, experts from a range of different industries and subject areas, decision makers from the worlds of politics and public administration, as well as experts from Austria and abroad were all given the opportunity to have their say. During the process, various approaches were presented, specific issues pinpointed and shared ideas for the future developed.

Strategic process

VISITOR ECONOMY STRATEGY 2025



“WHAT’S IN TODAY,
IS ALREADY OUT BY TOMORROW.
WE HAVE TO FOLLOW A PATH
OF OUR OWN THAT HAS THE
SUPPORT OF THE WHOLE CITY.”

Heinz Reitbauer,
Steirereck

The Vienna Tourist Board initiated and coordinated this process and will play a central role in the implementation of the strategy and its individual measures. Like the other stakeholders in Vienna’s visitor economy ecosystem, it will be involved in initial implementation of the measures on certain occasions and on others in a consulting or supporting role. Above all, the Vienna Tourist Board is committed to taking a public stance on all of the core issues that impact the future of the destination, providing impetus and flagging up new solutions.

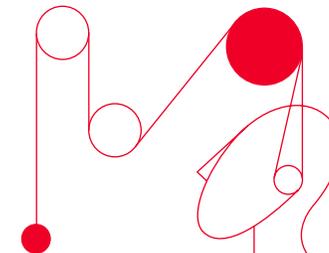
In line with its new corporate strategy, the Vienna Tourist Board has two core tasks:

- **DESTINATION MARKETING:** As an experienced marketing agency for the destination, the Vienna Tourist Board reaches out to defined target audiences in selected markets, communicating the city’s premium qualities and inspiring prospective guests to travel to Vienna.
- **DESTINATION MANAGEMENT:** At the same time, the Vienna Tourist Board has all of the different skills it needs to offer visitors high-quality experiences in the city, ensuring that the visitor economy also adds value for residents. This involves close cooperation with partners all over the city and managing interest groups.

After all, realizing Vienna’s vision for the future involves establishing and maintaining ties with traditional stakeholders in the industry as well as visitors and residents, collecting feedback on a regular basis and taking it seriously, not just gathering creative ideas but also implementing them, and keeping an open ear for critical voices and uncomfortable responses. All of this comes under our definition of destination management.

The Vienna Tourist Board will press ahead with this process of information sharing, reflection and development at various different levels over the years to come:

- Formats for critical discussion and development of creative ideas were established by means of **DISCUSSION FORUMS** in the strategy development process. These facilitated dialog between experts from various areas and will be continued in future, with participation open to anyone wishing to work on fulfilling the vision.
- The **SHAPING.VIENNA.INFO** website, curated by the Vienna Tourist Board, will become a central destination management communication platform where stakeholders will be kept up-to-speed, as well as having the opportunity to submit their own suggestions. Useful information and newsworthy developments at the destination, as well as reports of successful measures taken by visitor economy stakeholders to implement the strategy should also be shared in a compact form in a blog to promote discussion.
- Comprehensive **SURVEYS** of visitors and Viennese residents will give regular indicators of sentiment, and specific requirements and issues. Key customer touch points will be specifically analyzed to continuously improve offerings and services.



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