Vienna Tourism Statistics

Users’ perspective in supply and demand side statistics

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Vienna Tourist Board
Strategy Dept.
2 April 2008

The Demand Side
The Supply Side
Benchmarking
Demand:
Who is using the supplied capacities where and when?

Statistics on overnight stays and source markets

Analyzing the size of source markets:
Arrivals and overnight in all types of accommodation
January–December 2007

<table>
<thead>
<tr>
<th>Main markets</th>
<th>Arrivals</th>
<th>+/- %</th>
<th>Overnights</th>
<th>+/- %</th>
<th>*)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>2007</td>
<td>2006</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>4,235,317</td>
<td>3,933,814</td>
<td>9,675,208</td>
<td>9,356,044</td>
<td>7,7</td>
</tr>
<tr>
<td>thereof from foreign countries</td>
<td>3,194,007</td>
<td>2,813,341</td>
<td>7,668,861</td>
<td>7,181,077</td>
<td>4,8</td>
</tr>
<tr>
<td>Germany</td>
<td>782,120</td>
<td>4,4</td>
<td>1,900,401</td>
<td>-5,4</td>
<td>2,43</td>
</tr>
<tr>
<td>Austria</td>
<td>1,041,310</td>
<td>17,5</td>
<td>2,006,347</td>
<td>15,8</td>
<td>1,93</td>
</tr>
<tr>
<td>USA</td>
<td>261,742</td>
<td>-1,7</td>
<td>656,405</td>
<td>-1,7</td>
<td>2,51</td>
</tr>
<tr>
<td>Italy</td>
<td>219,225</td>
<td>-13,9</td>
<td>572,373</td>
<td>-13,5</td>
<td>2,61</td>
</tr>
<tr>
<td>Great Britain</td>
<td>182,223</td>
<td>9,8</td>
<td>410,580</td>
<td>1,6</td>
<td>2,25</td>
</tr>
<tr>
<td>Spain</td>
<td>146,534</td>
<td>1,4</td>
<td>361,747</td>
<td>-3,5</td>
<td>2,47</td>
</tr>
<tr>
<td>Japan</td>
<td>128,059</td>
<td>-16,0</td>
<td>273,934</td>
<td>-19,0</td>
<td>2,14</td>
</tr>
<tr>
<td>France</td>
<td>109,872</td>
<td>-2,1</td>
<td>276,258</td>
<td>-4,8</td>
<td>2,51</td>
</tr>
<tr>
<td>Switzerland</td>
<td>118,669</td>
<td>8,8</td>
<td>281,663</td>
<td>6,4</td>
<td>2,37</td>
</tr>
<tr>
<td>Russia, Ukraine and other CIS countries</td>
<td>105,922</td>
<td>35,1</td>
<td>305,778</td>
<td>32,4</td>
<td>2,89</td>
</tr>
</tbody>
</table>

*) Overnights per arrival
Analyzing the demand by the quality of accommodation:
Arrivals and overnights by category
January–December 2007

<table>
<thead>
<tr>
<th></th>
<th>Arrivals</th>
<th>+/- %</th>
<th>Overnights</th>
<th>+/- %</th>
<th>*)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotels &amp; pensions only</td>
<td>3.961.612</td>
<td>7.8</td>
<td>9.032.723</td>
<td>3.0</td>
<td>2.28</td>
</tr>
<tr>
<td>thereof from foreign countries</td>
<td>2.983.598</td>
<td>4.4</td>
<td>7.193.620</td>
<td>-0.1</td>
<td>2.41</td>
</tr>
<tr>
<td>Hotels *****</td>
<td>597.879</td>
<td>4.9</td>
<td>1.206.937</td>
<td>0.4</td>
<td>2.02</td>
</tr>
<tr>
<td>Hotels &amp; pensions ****</td>
<td>2.119.120</td>
<td>5.7</td>
<td>4.836.164</td>
<td>0.1</td>
<td>2.28</td>
</tr>
<tr>
<td>Hotels &amp; pensions ***</td>
<td>990.357</td>
<td>8.1</td>
<td>2.397.818</td>
<td>5.7</td>
<td>2.42</td>
</tr>
<tr>
<td>Hotels &amp; pensions **</td>
<td>254.256</td>
<td>34.0</td>
<td>591.804</td>
<td>26.8</td>
<td>2.33</td>
</tr>
<tr>
<td>Other types of accommodation</td>
<td>273.705</td>
<td>8.1</td>
<td>647.465</td>
<td>9.6</td>
<td>2.35</td>
</tr>
<tr>
<td>Youth hostels</td>
<td>225.473</td>
<td>8.1</td>
<td>481.755</td>
<td>8.8</td>
<td>2.14</td>
</tr>
<tr>
<td>Camping sites</td>
<td>46.320</td>
<td>8.0</td>
<td>148.022</td>
<td>12.7</td>
<td>3.20</td>
</tr>
<tr>
<td>Private homes</td>
<td>1912</td>
<td>7.1</td>
<td>12.708</td>
<td>6.4</td>
<td>6.65</td>
</tr>
</tbody>
</table>

*) Overnights per arrival

High demand in first-class hotels:
Overnights by category
January–December 2007

![Pie chart showing distribution of overnights by category]

3* hotels and pensions

From stagnation to an upward trend: Arrivals and overnights 1993–2007

3* hotels and pensions
Revenues develop much better than overnights: The last five years
Vienna: Overnight stays and rooms revenue
All types of accommodation
2002 - 2007

<table>
<thead>
<tr>
<th>Year</th>
<th>Overnight stays</th>
<th>Rooms revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>2002</td>
<td>7,665,391</td>
<td>8,000,000</td>
</tr>
<tr>
<td>2003</td>
<td>7,955,076</td>
<td>8,500,000</td>
</tr>
<tr>
<td>2004</td>
<td>8,429,398</td>
<td>9,000,000</td>
</tr>
<tr>
<td>2005</td>
<td>8,768,660</td>
<td>9,500,000</td>
</tr>
<tr>
<td>2006</td>
<td>9,356,044</td>
<td>10,000,000</td>
</tr>
<tr>
<td>2007</td>
<td>9,675,208</td>
<td>10,500,000</td>
</tr>
</tbody>
</table>

Overnight stays
Rooms revenue

Prognosis by extrapolating latest trends:
Overnights from 2010 to 2015
Vienna: Overnight stays
Forecast 2010 - 2015

- 3.3% p.a.
- 2.3% p.a.

<table>
<thead>
<tr>
<th>Year</th>
<th>Overnight stays</th>
<th>Rooms revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>10,600,000</td>
<td>12,600,000</td>
</tr>
<tr>
<td>2015</td>
<td>10,400,000</td>
<td>12,100,000</td>
</tr>
</tbody>
</table>

Data source: Egon Smeral, Austrian Institute for Economic Research
Published by: Vienna Tourist Board
Statistics & Market Research
Katrin Heintschel, Tel. +43-1-211-14-271
February 2008
Vienna Tourism 2007
25,000 rooms, 47,000 beds
9.7 million overnight stays (+ 3.4 %)
Rooms revenue: 445 mn € (+ 12 %)
Rooms occupancy: 58.7 %

1 Germany 19.6 % 8 France 2.9 %
2 Austria 17.5 % 9 Japan 2.8 %
( other 8 states) 10 Romania 2.4 %
3 U.S. 6.8 % 11 Russia 2.3 %
4 Italy 5.9 % 12 Netherlands 2.0 %

Analyzing the most dynamic source markets:
Where the power of changing the pattern comes from

Vienna: A selection of top performing foreign markets* (in alphabetical order)
Growth rates for overnight stays - all types of accommodation 2002/2007

Overnight stays

Data source: Statistics and Analysis Division of Municipal Department 5
Prepared by: Vienna Tourism Board
Statistics & Market Research

* A complete ranking of all source markets is attached.

February 2008

Overnight stays

- 100,000
- 200,000
- 300,000
- 400,000
- 500,000
- 600,000
- 700,000

Arab countries Australia Canada Czech Republic France Greece
Ukraine, Russia & other CIS countries Hungary Romania Spain USA 

+130.8% +87.8% +50.6% +16.2% +80.9% +59.2% +46.5% +82.3% +51.1% +19.1% 

2002 2007
Arrivals and overnights: Guests from Russia
227,200 overnights in 2007
Before 2003, Russia hasn’t been identified in statistics separately

All types of accommodation

Mirror of a country’s development:
Arrivals and overnights: Guests from Romania
229,600 overnights in 2007

All types of accommodation
Too many VFRs outside of the statistics?
Arrivals and overnights: Guests from Poland
81,500 overnights in 2007

Supply:
What's going on in the hotel market?
Statistics on hotel capacity and occupancy
Kind of a hotel boom
Hotel capacity 2010: 27.000 rooms, 51.000 beds

Vienna: Hotels & Pensions

Expected growth of the luxury market:
Hotel capacity and occupancy

Vienna: Luxury hotels
Why everybody wants to build a four-star hotel:
Room occupancy by month (in %)
4* hotels 2007: 74.5%
Could be better, the hoteliers say:
Average revenue per guest and night (in €)
Hotels & pensions 2007: 48.40 €

![Chart showing average revenue per guest and night for hotels and pensions from 2005 to 2007.]

The upward trend should continue:
Revenues in the luxury segment
Vienna: RevPAR
Revenue per available room
Luxury hotels
2002 - 2007

![Chart showing revenue per available room (RevPAR) for luxury hotels in Vienna from 2002 to 2007.]

* Deloitte figures include luxury and 4-star hotels only.
Benchmarking:
Are we as successful as we believe?

Statistics on our main competitors

TourMIS 2007
Competitors: Top 10 European Destinations 2006
Overnight stays and growth rate

London: +6.4%
Paris: +5.5%
Rome: +6.8%
Barcelona: +8.8%
Madrid: +18.5%
Prague: +8.8%
Vienna: +0.6%
Dublin: +6.2%
Munich: +6.0%

www.tourmis.info

www.B2B.vienna.info
„I only believe in statistics
I have faked myself.“
(old wisdom)

Thank you for your attention!