

Vienna residents' attitude towards tourism 2022

V I E N N A

NOW ◆ FOREVER



Sample and methodology

2022

- **Study design:** Vienna Tourist Board – Strategic Destination Development
- **Target group:** Vienna residents aged 18 - 70
- **Note on the sample:** In their composition, the respondents correspond to the population of Vienna aged 18 to 70 years. Age groups over 70 are under-represented by the survey method. This survey was carried out in German. The present document is a translation of the original survey.
- **Survey rates** by age and gender, **weighting of data** by age, gender, education and district
- **Survey method:** Online interviews
- **Evaluation basis:**
 - ~ 300 completed questionnaires per month, maximum statistical fluctuation range, +/- 5.7%
 - TOTAL: n=3,648, maximum statistical variance, $\pm 1.6\%$
 - Rounding differences may occur in percentages, so total totals may be greater or less than 100%
- **Survey period:** January till December 2022
- **Fieldwork & analysis:** MANOVA GmbH
- **Analysis:** Clemens Költringer, Petra Tschöll

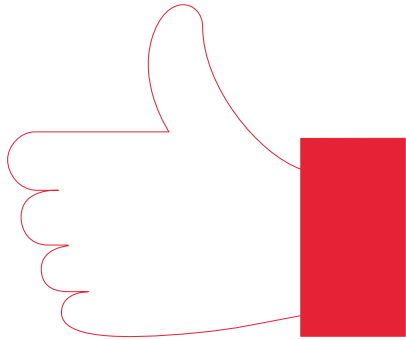
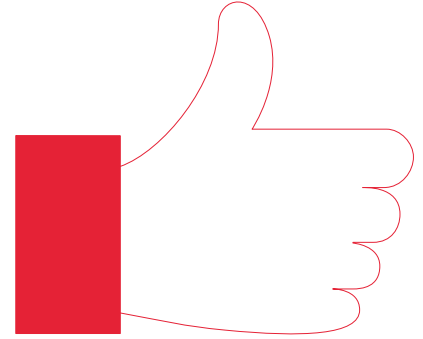
Results



VIENNA

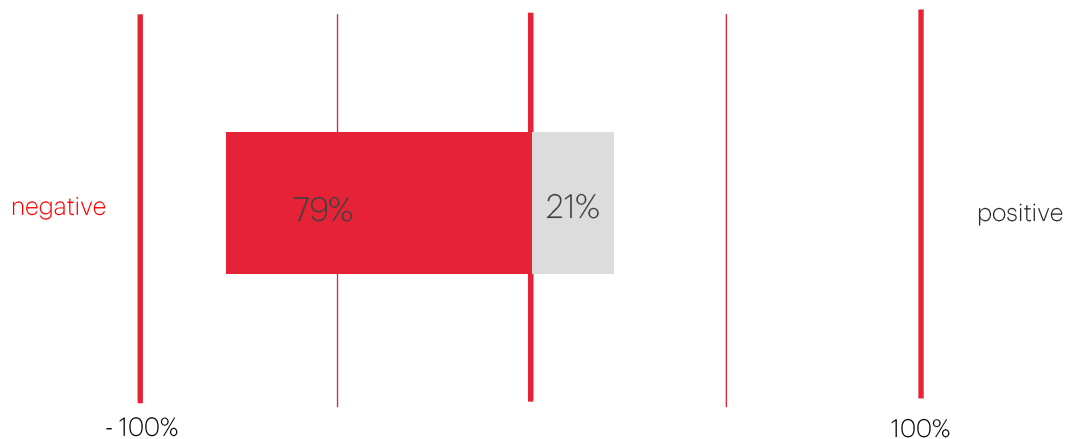
Target monitoring

9 out of 10 Viennese
ARE (VERY) POSITIVE ABOUT TOURISM.¹



9 out of 10 visitors
WILL (HIGHLY) RECOMMEND VIENNA AS A HOLIDAY DESTINATION.²

Impact of COVID-19-related visitor declines on the city and its residents



4/5

VIENNESE RECOGNIZE
THE NEGATIVE EFFECTS
CAUSED BY THE ABSENCE
OF TOURISM

Question: Please rate the overall impact of the absence of guests on the city and its inhabitants caused by COVID-19.
Scale: very negative < - > very positive | 0 < - > 100

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Basis: Vienna residents aged 18 to 70 years
results in percent, n=3,446

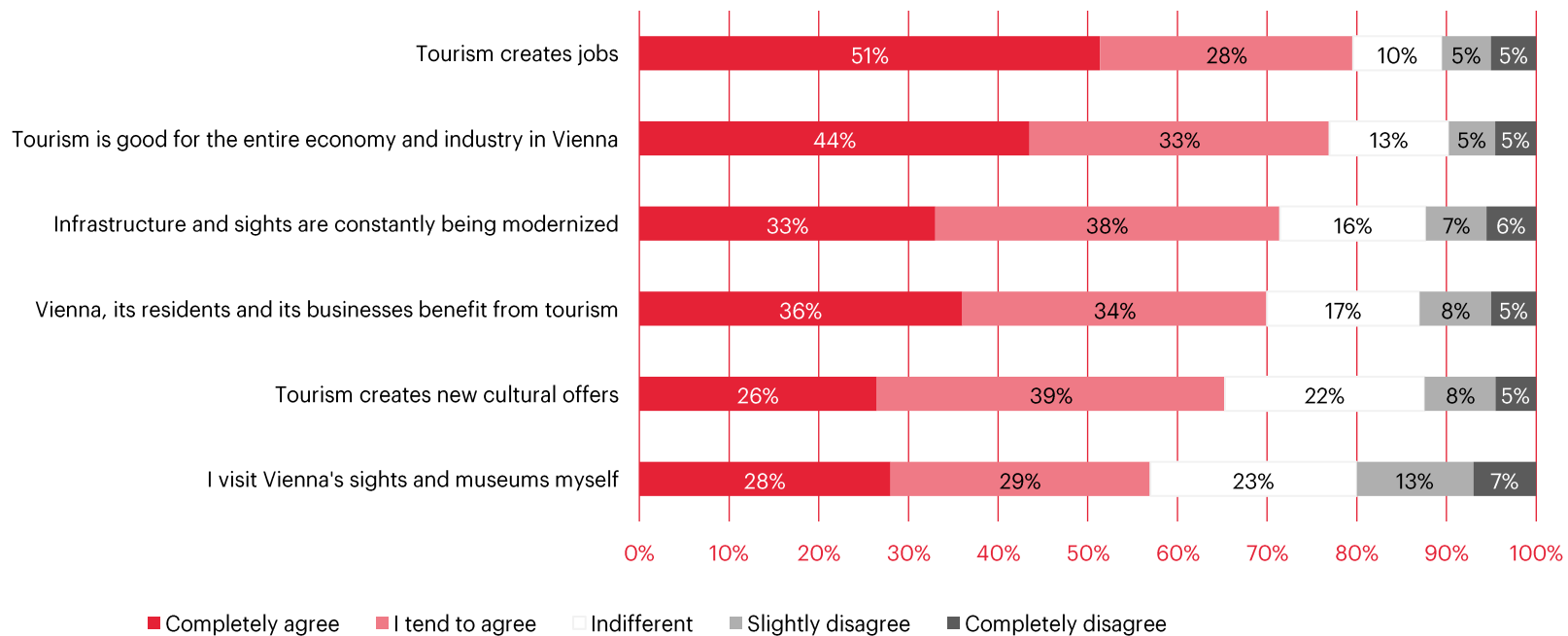
Statements about tourism



VIENNA

Statements about tourism

I/III



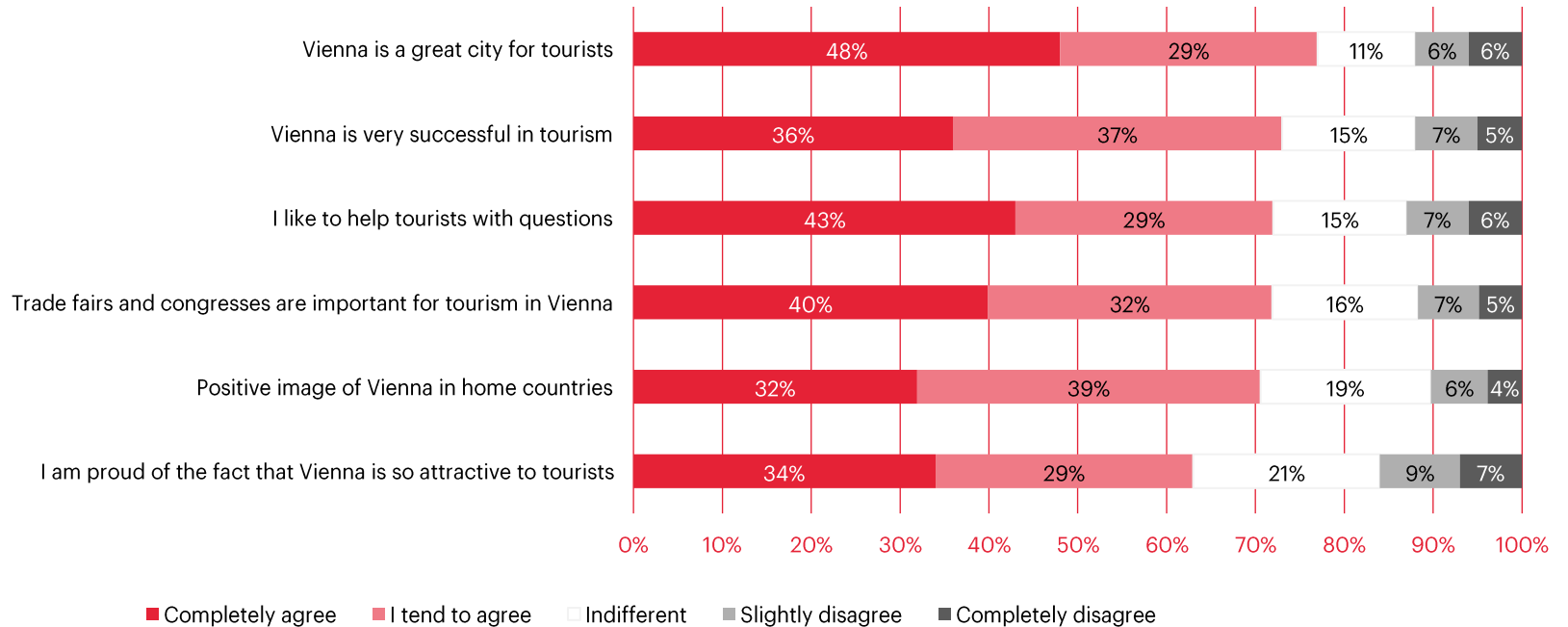
Question: Please rate the following statements about tourism and tourists in Vienna. Please indicate on a scale of 1 to 5, how much you agree with these statements. 1 means you agree completely and 5 means you completely disagree.

VIENNA

Basis: Vienna residents aged 18 to 70 years
results in percent, n=3,415 to 3,624

Statements about tourism

II/III



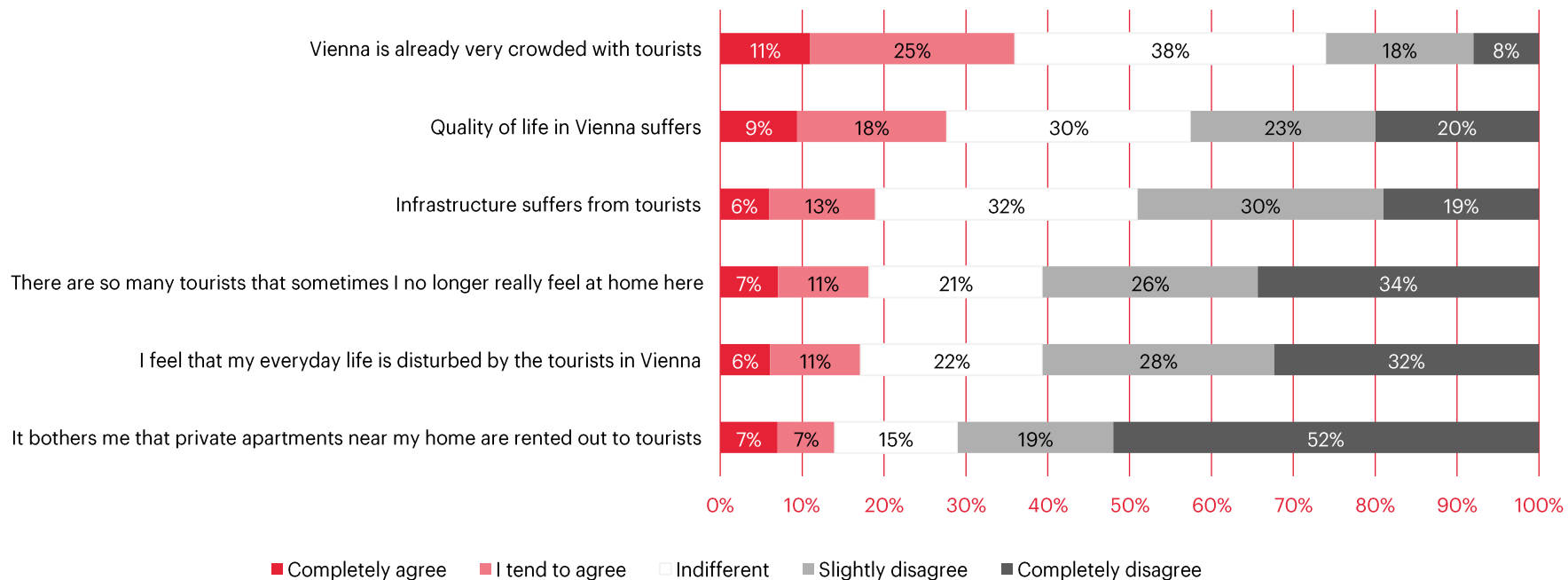
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Statements about tourism

III/III



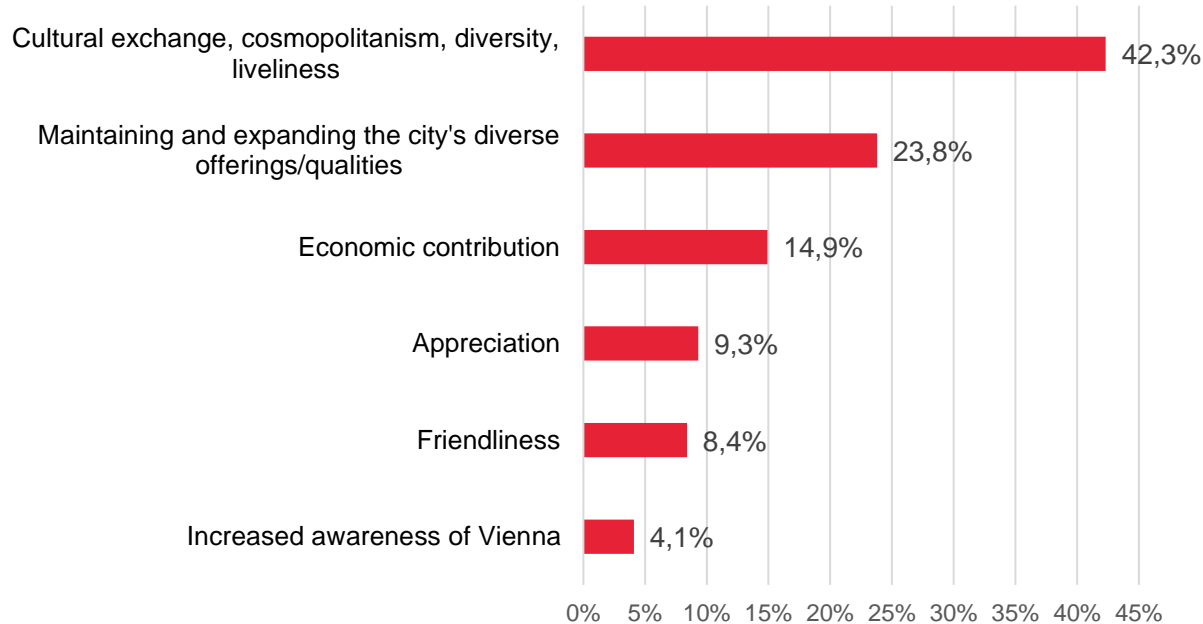
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VIENNA

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Positive associations 2022

OPEN COMMENTS CATEGORIZED



THE FEELING OF VISITORS' APPRECIATION OF THEIR CITY HAS INCREASED SIGNIFICANTLY AMONG VIENNESE OVER THE PAST YEAR.

Question: If there is something you particularly like about tourism or tourists in Vienna, what is it? Open text answer

VIENNA

Basis: Vienna residents aged 18 to 70 years
results in percent, n=2,735

Future topics



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Ranking of future topics

Future topics	2022	2021	Δ	
Cleanliness in the city	1	1	=	
Recognizing the needs of guests and residents and keep them in sustainable balance	2	2	=	
Quality control and training for Viennese taxi drivers	3	3	=	
Regulation of street vendors that sell touristic offers	4	4	=	
Strengthening Vienna as a congress destination	5	8	↑	(+3)
Improved usability of the banks of the Danube & Danube Canal	6	5	↓	(-1)
International film productions in Vienna	7	7	=	
Regulation of quantity and quality of souvenir stalls	8	6	↓	(-2)
Keeping stores open on Sundays	9	9	=	
Improved street lighting	10	10	=	
Upgrading of the „Flanierzonen“ along the ring road	11	12	↑	(+1)
Enhance tourism offerings away from the main tourist attractions	12	11	↓	(-1)
Improvement of service quality in the Viennese gastronomy	13	13	=	
Multilingualism of adverts on public transport	14	14	=	
Taking the needs of tourism into account in the development of the city	15	15	=	

Question: In your opinion, which areas should the Vienna tourism industry concentrate on specially in the next few years ? 1 means very important, 5 completely unimportant.
Ranking according to top 2 answer: "very important" and "important".

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Basis: Vienna residents aged 18 to 70 years
results in percent, n=3,504 to 3,613

Findings



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Findings 2022

OVERVIEW

- Vienna residents' attitude towards tourism continues to be **excellent**.
- **9 out of 10** Viennese **fully support tourism**, at the same time **9 out of 10 visitors recommend Vienna** as a holiday destination.

This balance describes a balanced tourism development according to the goals of the Vienna Visitor Economy Strategy 2025 (shaping.vienna.info).

- 4 out of 5 Viennese are still feeling the **negative effects of the COVID-related decline in tourism**. Although the pandemic has not yet been completely digested, the recovery trend is continuing.

Findings 2022

ADDED VALUE

- Viennese are aware of the **importance of the Visitor Economy as an economic sector & employer, from which both the economy and the residents benefit**. The increase in travel demand showcases the positive contribution of tourism to the inhabitants; especially within the inner districts.
- The identification with tourism is still very high. The **Viennese are proud** that their city is attractive and therefore visited from people from all over the world.
- Visitors again enliven and enrich the cityscape. **International exchange and diversity** make Vienna **a cosmopolitan metropolis**.
- In addition, **tourism creates and maintains products** in the areas of art & culture, gastronomy, but also sights and infrastructure that are **used by our visitors and residents alike**.

Findings 2022

CHALLENGES

- In 2022, the **effects of multiple crises** overlapped. Aspects such as **rising costs of living** and a **decline in perceived security** are leading to a more pessimistic attitude among the population.
- As a result of the resurgence in demand, **volume-induced effects such as rentals in the private sector or noise disturbance are coming to the fore.**
- Challenges with **visitors staying overnight in private apartments** remain at a constant level.
- Tourism **creates jobs** and has a **positive effect on the entire economy and industry** in Vienna. However, the **(perceived) attractiveness of these jobs has decreased** significantly among the population compared to 2019.
- The **shortage of labor is a challenge for the value proposition** of the destination, but also has a negative impact on the **employees' identification** with their own industry. The latter leads to a **decreased affirmation** of tourism as an industry from which both **the city and its residents benefit.**

Statistical information



VIENNA

Statistical information

2022 - WEIGHTED

n	3,648
	PERCENT
Men	49
Women	51
18 to 29 years	25
30 to 39 years	21
40 to 49 years	20
50 to 59 years	19
60 to 70 years	14
70 years and older	0

	PERCENT
Compulsory education	47
Further education without GCE	10
Further education with GCE	20
Secondary education, university	22
Inner districts	14
Outer Northeast	28
Outer South	34
Outside Northwest	25
Tourism professions	9
Others	91

Further information:

Clemens Költringer | Petra Tschöll

Strategic Destination Development

clemens.koeltringer@wien.info | petra.tschoell@wien.info

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