

Market and Trade Profile: Austria

Austria





Overview

- **Chapter 1: Inbound market statistics** provides insights on key statistics about Austrian travellers and who they are. It takes a look at Britain and its competitive set as well as activities of Austrian visitors in the UK.
- **Chapter 2: Understanding the market** takes a close look at Austrian consumer trends, booking, planning and further travel behaviour of this source market.
- **Chapter 3: Access and travel trade** shows how Austrians travel to the UK, how to best cater for their needs and wants during their stay and gives insights into the Austrian travel trade. Further ways of working with VisitBritain and other useful research resources are pointed out.



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Chapter 1: Inbound market statistics





Chapter 1: Inbound market statistics

Chapter summary

- The Austrian outbound market is forecasted to account for 16 million trips abroad with at least one overnight stay by 2020. The UK was the 6th most visited destination for such trips to Western Europe in 2016, behind Italy, Germany, Spain, France and Greece.
- Austria ranks globally in 29th place for international tourism expenditure with US\$9.7bn in 2016.
- Austria was the 22nd largest inbound source market for the UK for volume and 32nd most valuable for visitor spending in 2016.
- Roughly one third of Austrian visits to the UK are made in the summer months followed by 27% in the last quarter of the year, slightly above the all market average.
- 91% of Austrian leisure visitors are 'very likely' or 'extremely likely' to recommend Britain for a holiday or short-break.

**2016:
£176m
spend in
UK**

Source: International Passenger Survey by ONS, Oxford Economics (outbound overnight trips), UNWTO, CAA 2016 (asked to leisure visitors)



Chapter 1.1: Key statistics

Key insights

- Austria is the UK's 22nd largest source market in terms of visits and 32nd most valuable for visitor spending (2016).
- Almost half of visitor spending came courtesy of holiday visitors, 19% from business visits in 2016.
- Austrian visits to family and/or friends residing in the UK set a new record in 2016, having outperformed the previous peak of 2006. Holidays continue to lead journey purposes in terms of volume, and, in 2016, despite fluctuations were not far off the 2009 record of 151,000 visits.
- London is the leading destination for a trip to Britain but South East, Scotland and East of England are also popular (based on average nights spent in the UK in 2014-2016).
- The most popular activities undertaken by Austrian travellers in Britain include dining in a restaurant, shopping, going to the pub, sightseeing of famous monuments/buildings and spending time in parks and gardens.

The UK was the 6th most visited destination for Austrian outbound travel to Western Europe (2016).

Source: International Passenger Survey by ONS, Oxford Economics (outbound overnight trips)



1.1 Key statistics: global context and 10 year trend

Global context

Measure	2016
International tourism expenditure (US\$bn)	9.7
Global rank for international tourism expenditure	29
Number of outbound overnight visits (m)	13.9
Most visited destination	Italy

Inbound travel to the UK overview

Measure	Visits (000s)	Nights (000s)	Spend (£m)
10 year trend			
2007	290	1,478	115
2008	286	1,825	131
2009	286	1,643	175
2010	288	1,569	155
2011	271	1,759	142
2012	268	1,659	128
2013	275	1,448	142
2014	263	1,606	156
2015	277	1,734	164
2016	302	2,165	176

Source: International Passenger Survey by ONS, UNWTO, Oxford Economics (outbound overnight trips)



1.1 Key statistics – volume and value

Inbound volume and value

Measure	2016	Change vs. 2015	Rank out of UK top markets
Visits (000s)	302	9%	22
Nights (000s)	2,165	25%	32
Spend (£m)	176	8%	32

In January – September 2017 there were 246,000 visits from Austria to the UK, up 11% on the same time in 2016. Austrian visitors spent £159 million in the first nine months of 2017, up 31% on the same time in 2016. Thus in 2017 so far, visits and spend records for the first nine months have been set by the Austrian market.*

Source: International Passenger Survey by ONS

* based on provisional data

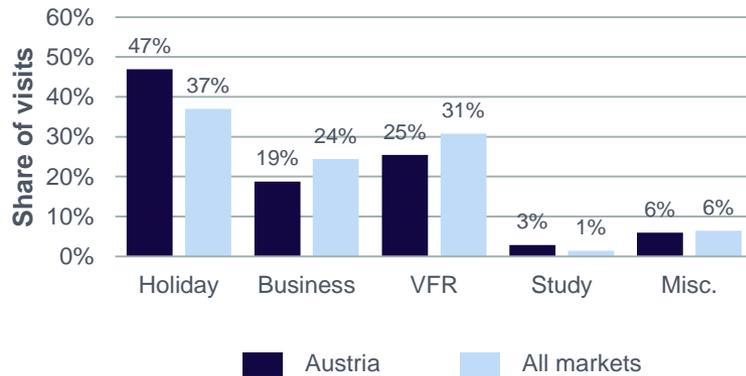
Nights per visit, spend

Averages by journey purpose in 2016	Nights per visit	Spend per night	Spend per visit
Holiday	6	£105	£615
Business	3	£195	£583
Visiting friends/relatives	7	£45	£321
All visits	7	£81	£585

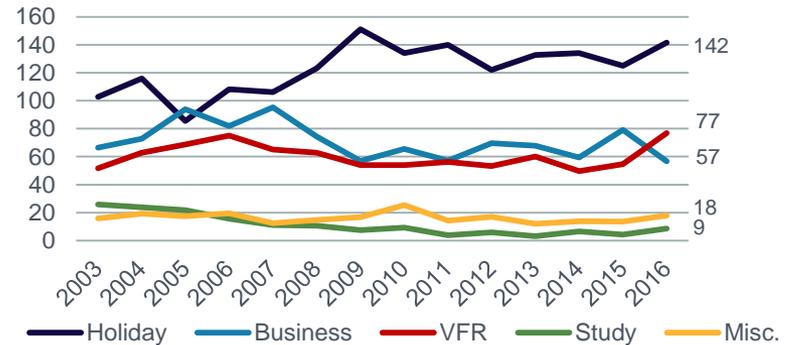


1.1 Key statistics: journey purpose

Journey purpose 2016



Journey purpose trend (visits 000s)



- In 2016, 47% of all visits to the UK from Austria were made for holidays, 25% to visit family and/or friends and 19% for business purposes.
- 62% of holiday visits from Austria to the UK in 2015 (excl. UK nationals) were made by repeat visitors. These repeat visitors came on average between two and three times in the past decade and spent £1,696 in the UK in total. This level of spend is above the average European holiday repeat visitor spending £1,626 in the same time frame.

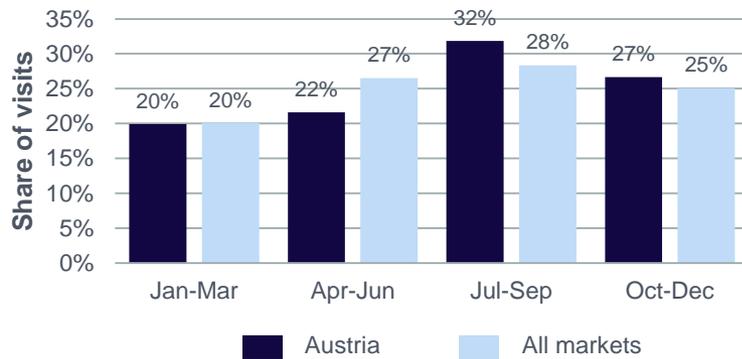
- Holidays continue to lead in terms of volume and, despite fluctuations, are not far off the record of 151,000 visits set in 2009. 49% of spending came courtesy of holiday visitors. Austrians coming to the UK to visit family / friends set a new record in 2016.
- Business visits have fluctuated over the years but stood at their lowest level in recent years in 2016 (after a spike in 2015), although still contributed 19% of Austrian visitor spending.
- 94% of those coming to the UK for business visits (excl. expats) had been to the UK before as had 91% of those coming to visit friends or relatives in the UK.

Source: International Passenger Survey by ONS; repeat / first time visitors question asked in 2015



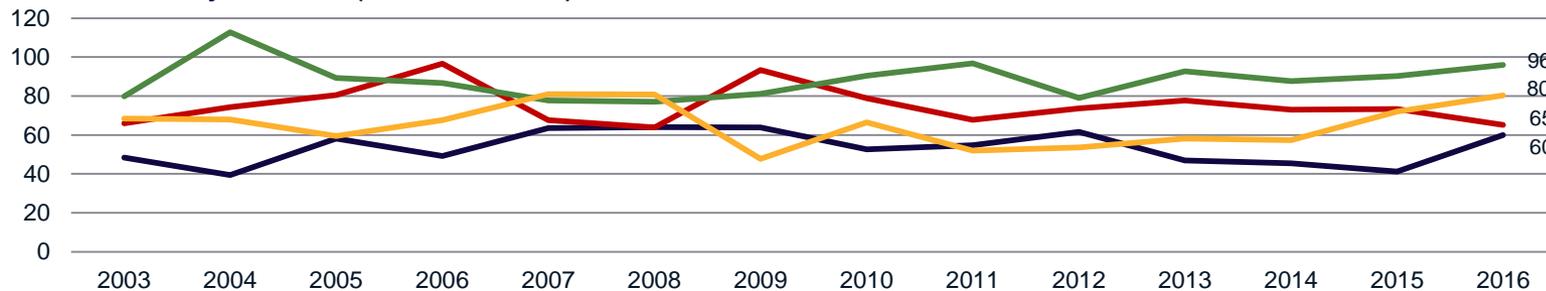
1.1 Key statistics: seasonality

Seasonality 2016



- The highest volume of visits from Austrian are in the summer months with roughly every third visit to the UK coming in this timeframe. More than one in four visits are made in the last quarter, slightly above average.
- Looking at the longer term, the importance of the summer months is evident but it also shows that the 2004 peak has not been matched again. The last quarter has also gained in importance over the last few years, outperforming the spring quarter, which saw a decline over the last few years, in 2016.

Seasonality trend (visits 000s)



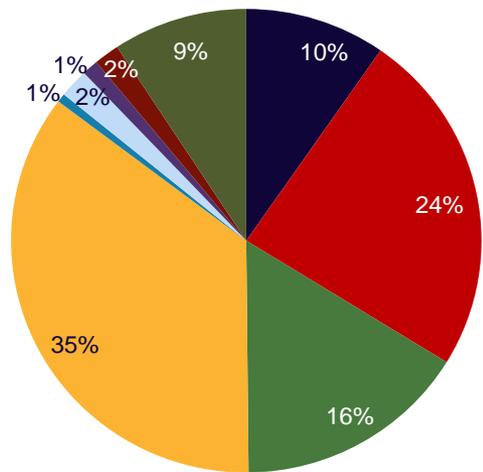
Source: International Passenger Survey by ONS

— Jan - Mar — Apr - Jun — Jul - Sep — Oct - Dec



1.1 Key statistics: length of stay and accommodation

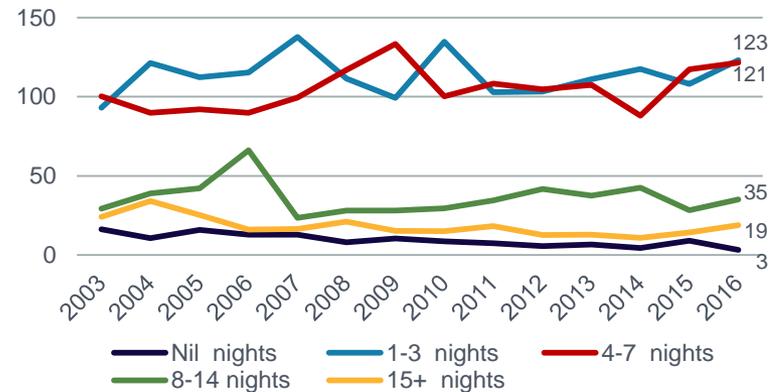
Accommodation stayed in, 2016
(nights, % share)



- Bed & Breakfast
- Hostel/university/school
- Other
- Paying guest family or friends house
- Rented house/flat
- Free guest with relatives or friends
- Hotel/guest house
- Own home
- Camping/caravan

Source: International Passenger Survey by ONS

Duration of stay trend (visits 000s)



- Austrian visits to the UK are shorter than average, with around 80% between 1-3 nights or 4-7 nights.
- More than one third of Austrian visitor nights were spent at a 'hotel/guest house' in 2016, followed by roughly one in four staying with relatives or friends for free. An above average share of one in ten nights was spent in B&Bs and 16% in hostels/university/school accommodation (compares to 3% and 8% respectively for all markets). Almost one in ten nights were spent in rented houses/flats.



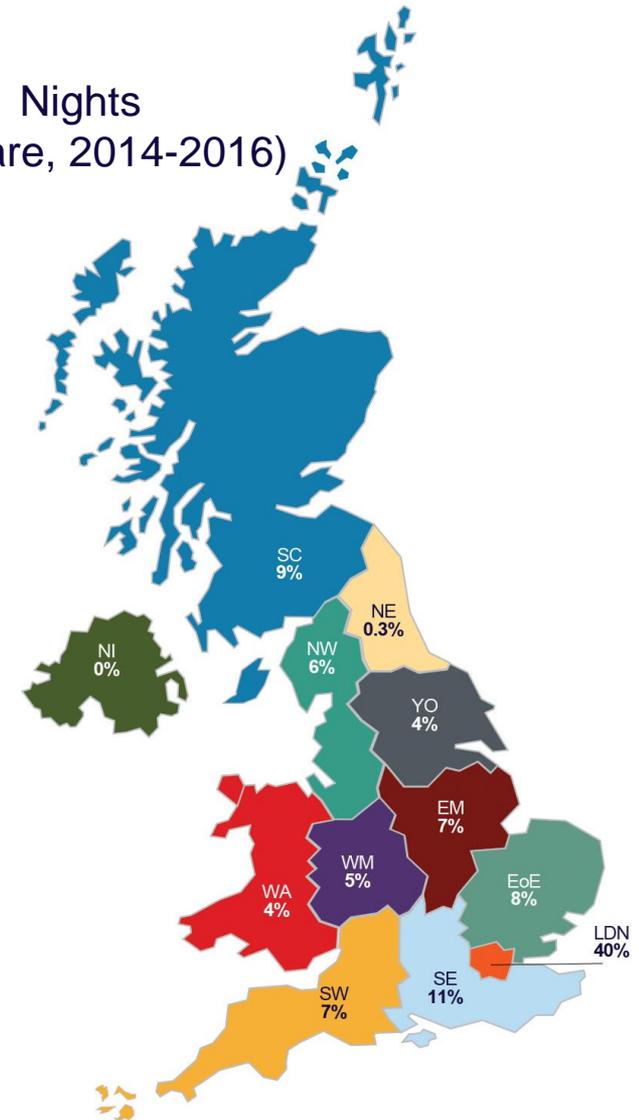
1.1 Key statistics: regional spread

Visits to the UK in (2014-2016 average)

Region	Nights stayed (000)	Visits (000)
Total	1,835	281
Scotland (SC)	167	24
Wales (WA)	67	6
Northern Ireland (NI)	1	0.1
London (LDN)	730	159
North East (NE)	5	1
North West (NW)	105	20
Yorkshire (YO)	74	8
West Midlands (WM)	97	14
East Midlands (EM)	121	7
East of England (EoE)	141	16
South West (SW)	130	17
South East (SE)	193	38
Nil nights (Nil)	N/A	6

Source: International Passenger Survey by ONS, may be based on small sample

Nights
(% share, 2014-2016)





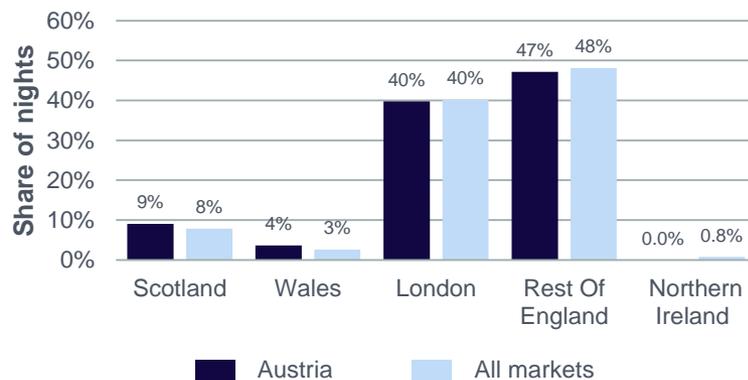
1.1 Key statistics: regional spread and top towns and cities

Top towns and cities visited

Town	Visits (000s, 2014-2016 average)
London	159
Edinburgh*	15
Manchester*	9

- London is the leading destination for a trip to Britain, accounting for 40% of visitor nights, but South East, Scotland and East of England are also popular based on the average nights spent in the UK in 2014-2016.
- Visitors from Austria have an above average propensity to visit rural and coastal areas of Britain, especially when they are holidaying here.
- Many Austrian visitors are comfortable with using public transport (particularly in towns/cities) or taxis while in the UK, with a larger than average proportion stating that they have used these means of transport on their trip, particularly within cities.
- Austrian holiday visits are less likely to have been booked as part of a package or an all-inclusive tour than the all market average (please note ONS definition of package holiday on page 16).

Regional spread (2014-2016)

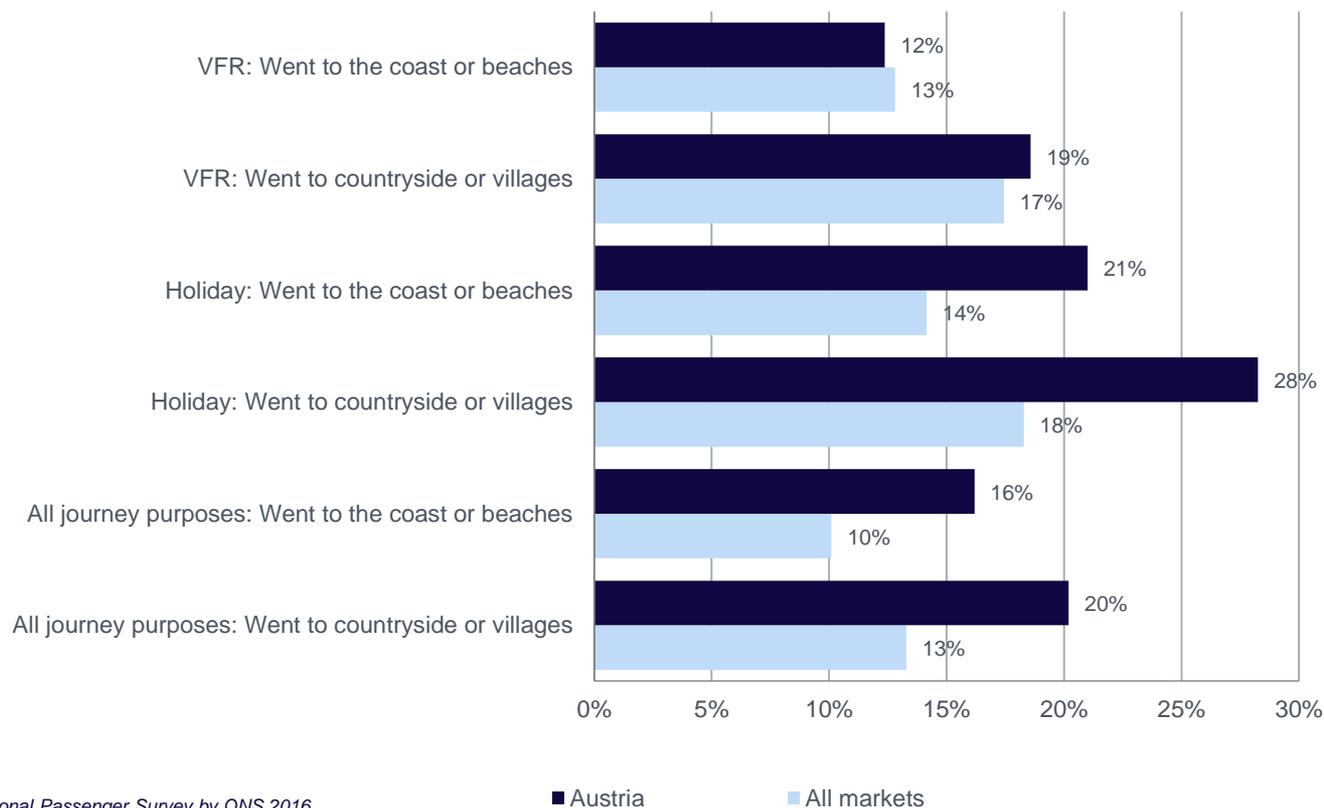


Source: International Passenger Survey by ONS, VisitBritain/IPSOS 2016, base: visitors
 *indicative due to small base



1.1 Key statistics: visits to coast, countryside and villages

Propensity to visit coast, countryside and villages

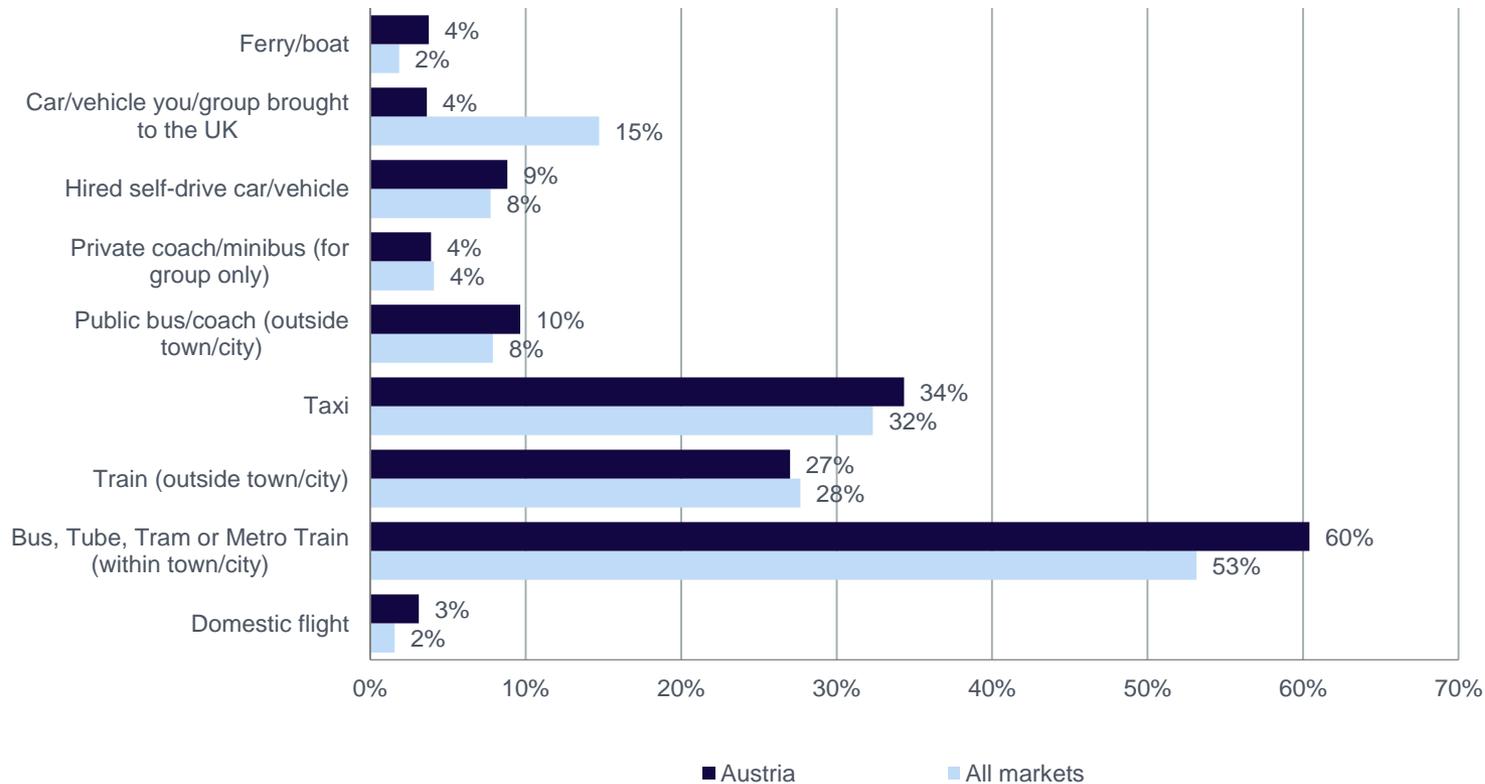


Source: International Passenger Survey by ONS 2016



1.1 Key statistics: use of internal modes of transport

Propensity to use internal modes of transport

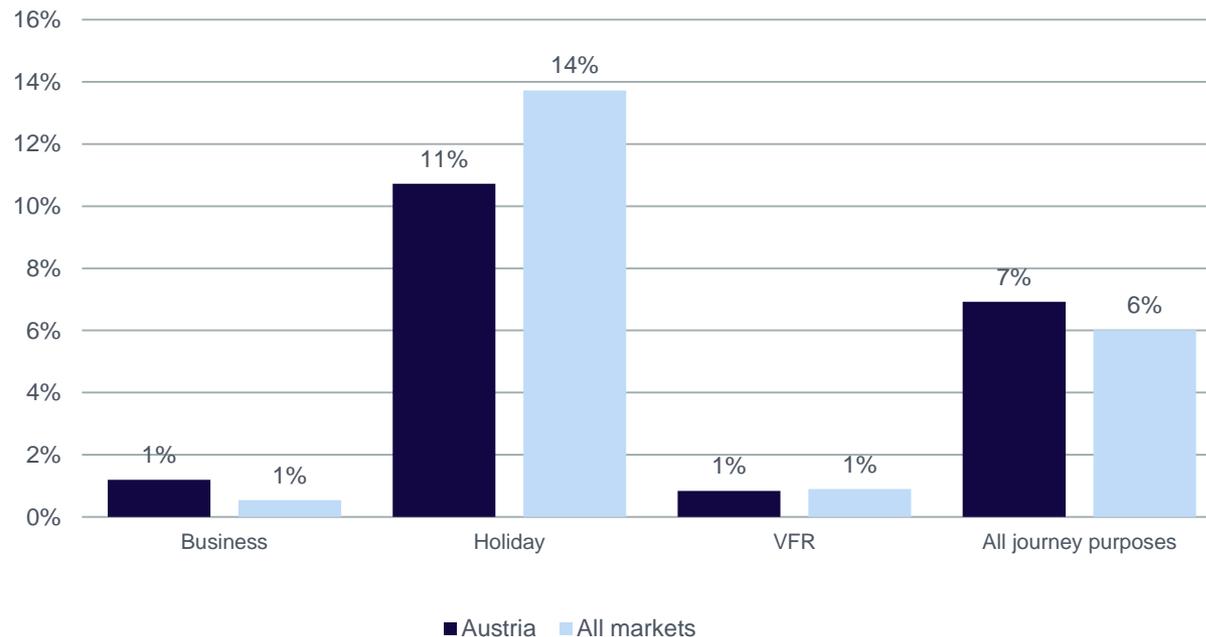


Source: International Passenger Survey by ONS, 2013



1.1 Key statistics: purchase of package tours

Proportion of visits that are bought as part of a package or all-inclusive tour in 2016



To be defined as a package, a trip must be sold at an inclusive price covering both fares to and from the UK and the cost of at least some accommodation. While some respondents may not know the separate costs of their fares and their hotel because they bought several air tickets and several sets of hotel accommodation from their travel agent, the ONS definition of a package is that the costs cannot be separated.

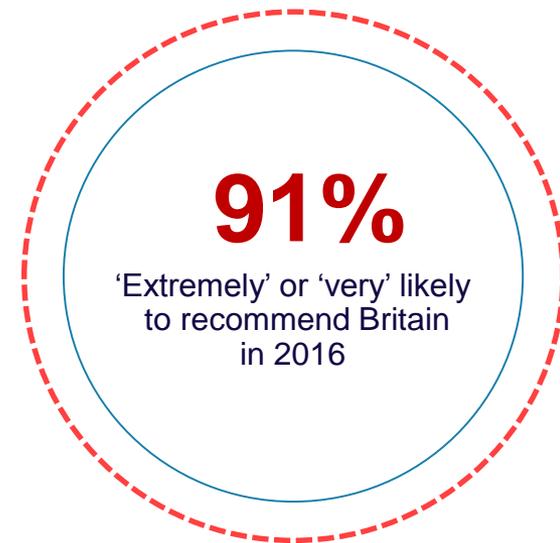
Source: International Passenger Survey by ONS



1.2 Visitor demographics

Visitor characteristics

- Business visitors are more than three times more likely to be male than female.
- 62% of holiday visits, 91% of visits to friends and relatives (VFR) and 94% of all business visits are repeat visits to Britain.
- Most visits from Austrian residents to the UK were made by Austrian nationals (79%), 7% by British nationals.
- Far more visitors come from Vienna and surroundings than any other part of Austria.
- 85% of Austrian leisure visitors felt 'extremely' or 'very' welcome' in Britain
- 91% of Austrian leisure visitors are 'very likely' or 'extremely likely' to recommend Britain for a holiday or short-break.



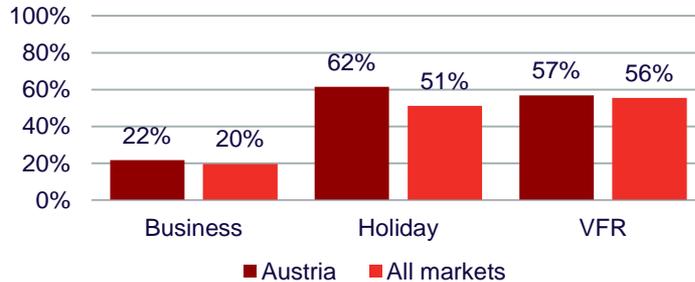
Source: International Passenger Survey by ONS, CAA 2016 (asked to leisure visitors)



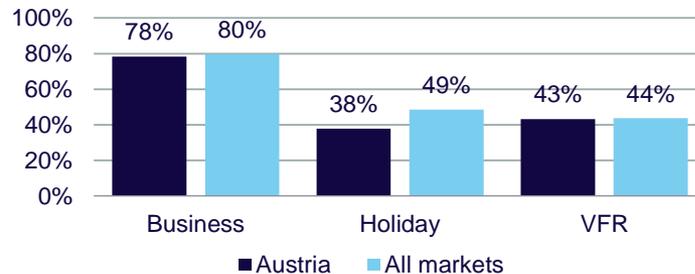
1.2 Visitor demographics: gender and age groups

Visitor demographics (2016):
gender ratio of visits from Austria:
52% female, 48% male

Female (% share of visits by journey purpose)

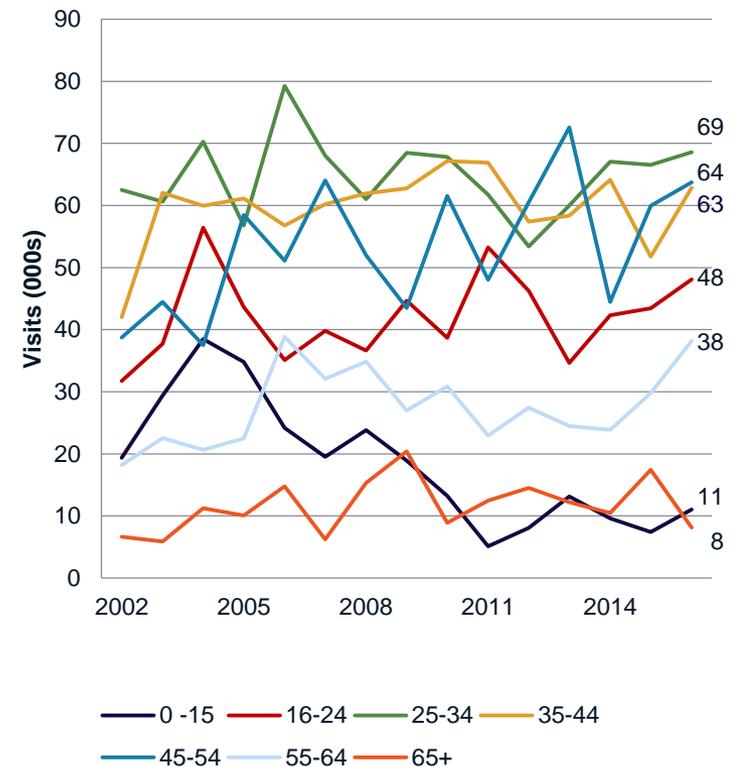


Male (share of visits by journey purpose)



Source: International Passenger Survey by ONS

Age group trend

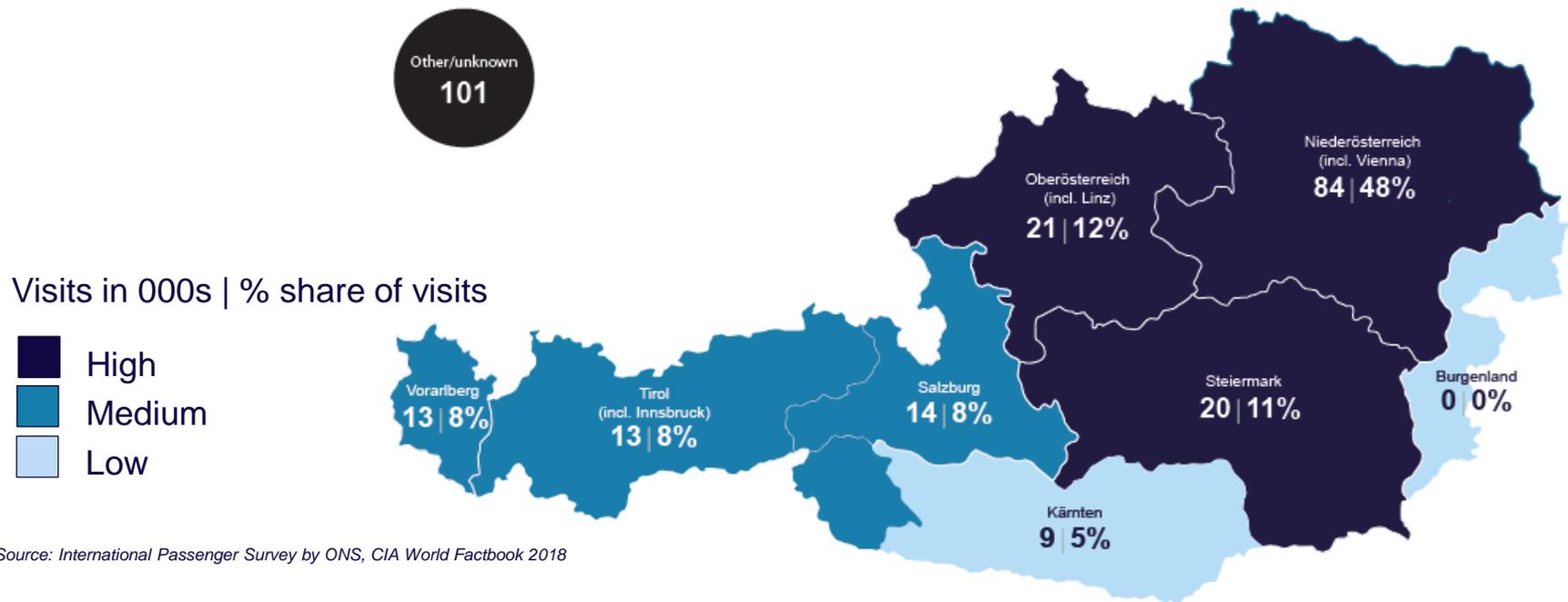




1.2 Visitor demographics: origin

Visits to the UK in 2013

- The largest proportion of Austrian visitors to the UK resides in the region of Niederösterreich (incl. Vienna), followed by Oberösterreich and Steiermark.
- The Northern and Eastern parts of Austria are more densely populated than the rest of the country. Roughly two thirds of Austrian residents live in urban areas.

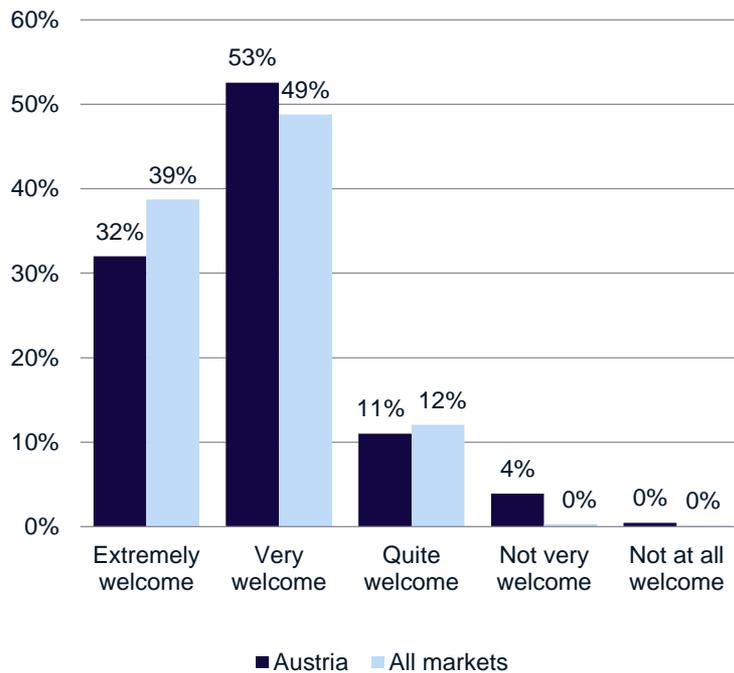


Source: International Passenger Survey by ONS, CIA World Factbook 2018

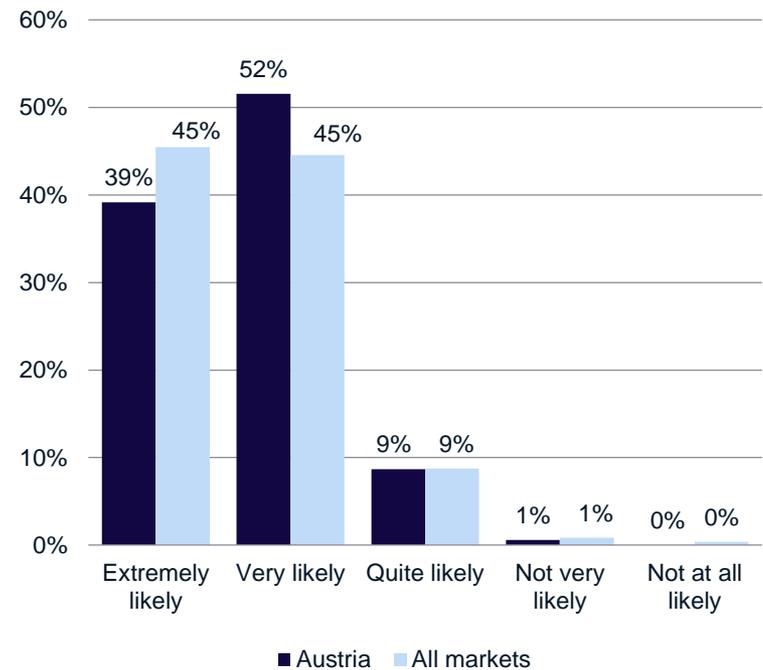


1.2 Visitor demographics: welcome and recommending Britain

Feeling of 'welcome' in Britain



Likelihood to recommend Britain



Source: CAA 2016 (asked to leisure visitors)



1.3 Britain and competitors

Market size, share and growth potential

- Italy was the most visited destination by Austrian travellers in 2016.
- Forecasts suggest that the number of Austrian outbound overnight trips shows good growth potential: 36% of growth is forecasted in the period from 2016-2025. The number of Austrian overnight trips to Britain is forecasted to grow by 33% in the same timeframe.
- The UK was the 6th most visited destination for Austrian outbound overnights trips to Western Europe in 2016, behind Italy, Germany, Spain, France and Greece.
- Just over half of all holiday trips taken by Austrian residents aged 15 or over in 2016 were domestic trips with 10 million such trips. Almost 77% of the Austrian resident population (15+ years of age) took at least one holiday trip in 2016 (domestic and/or outbound).

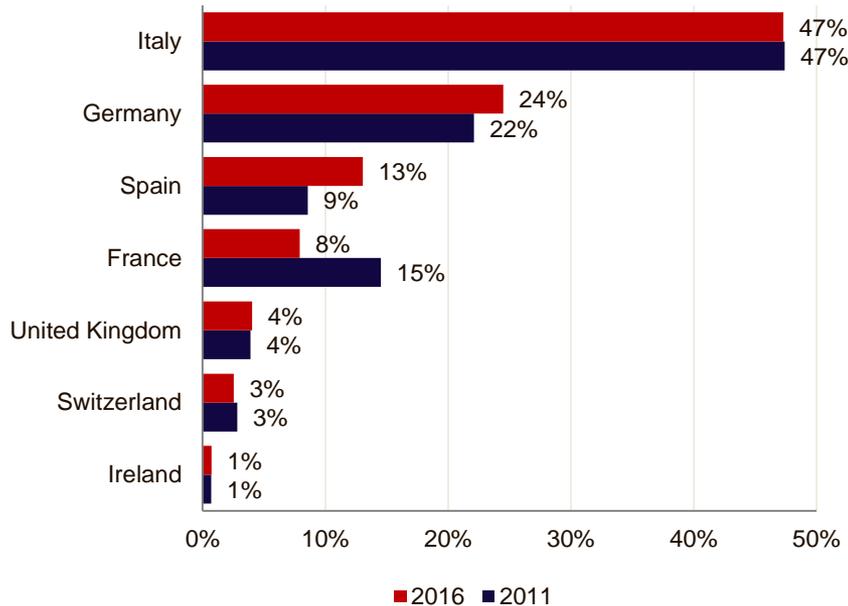
Source: Oxford Economics (outbound overnight trips), Bundesanstalt Statistik Österreich *Tourismus in Zahlen* 2016



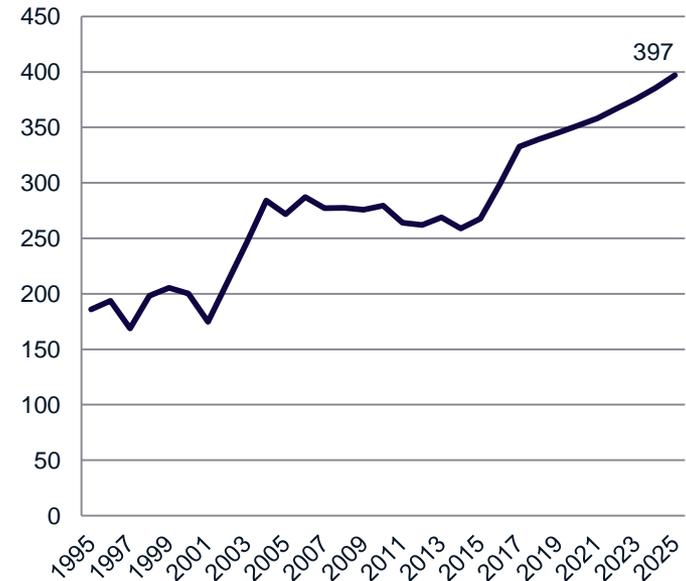


1.3 Britain and competitors

UK's market share of Austrian visits among competitor set



Historic and potential visits from Austria to the UK (000s)



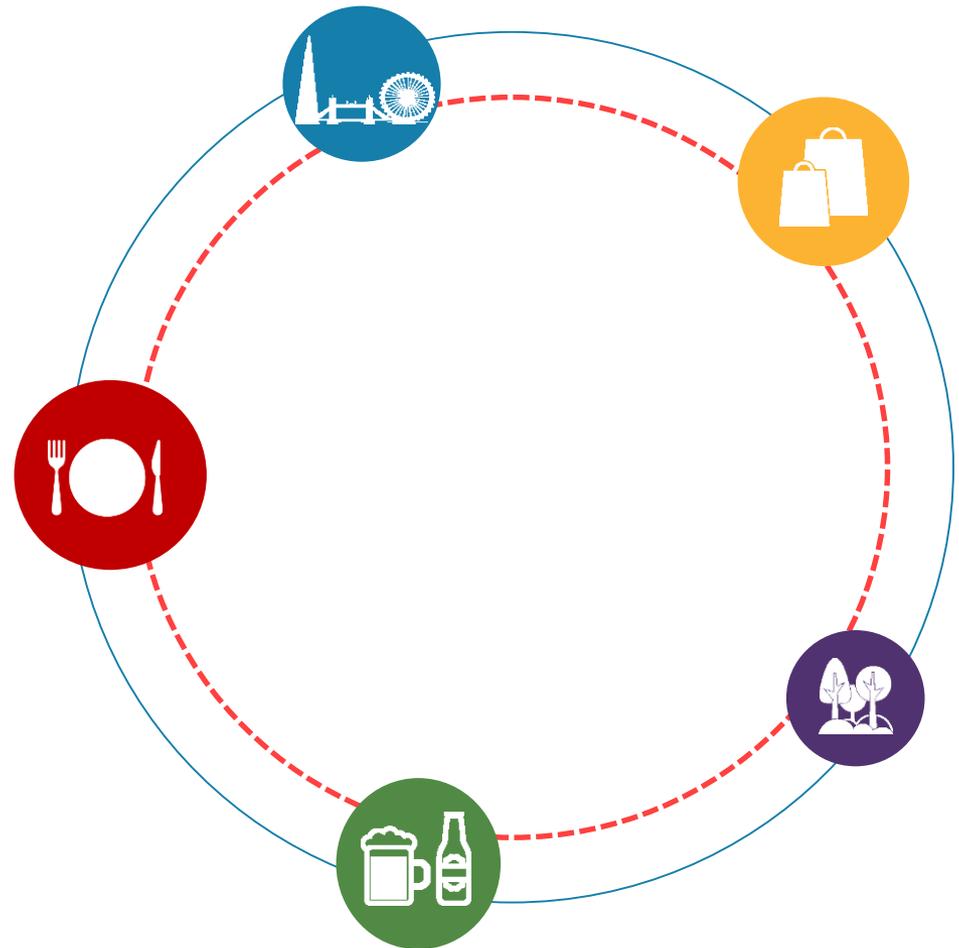
Source: Oxford Economics (outbound overnight visits)



1.4 Inbound activities

Inbound Britain activities

- Dining in a restaurant is the number one activity, featuring in 65% of Austrian visits. More than half of Austrian visits also include going to a pub. Socialising with the locals is also a popular activity, particularly among those visiting friends and/or relatives (nearly three in five visits).
- Shopping is the second-most popular activity being part of almost three in five Austrian visits.
- 44% of Austrian visits involve sightseeing of famous monuments/ buildings, more than a third feature visits to museums, art galleries, castles and/or historic houses.
- More than two in five spend time in the outdoors with a visit to a park/garden.

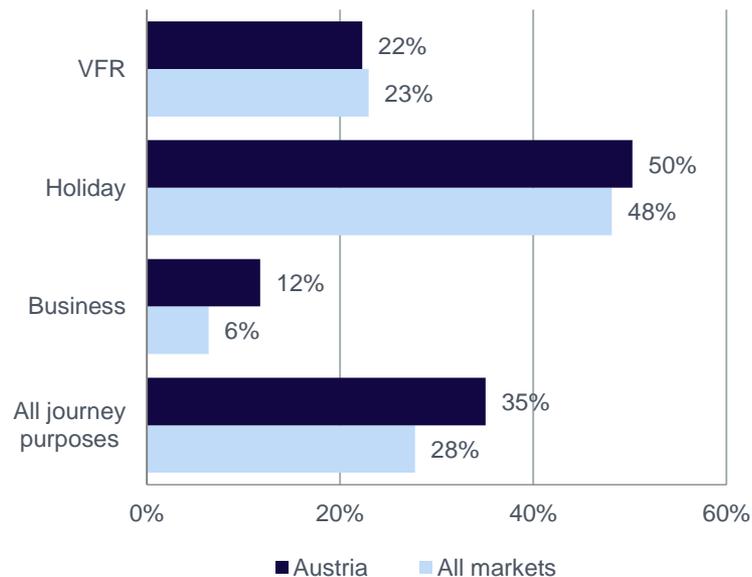


Source: International Passenger Survey by ONS

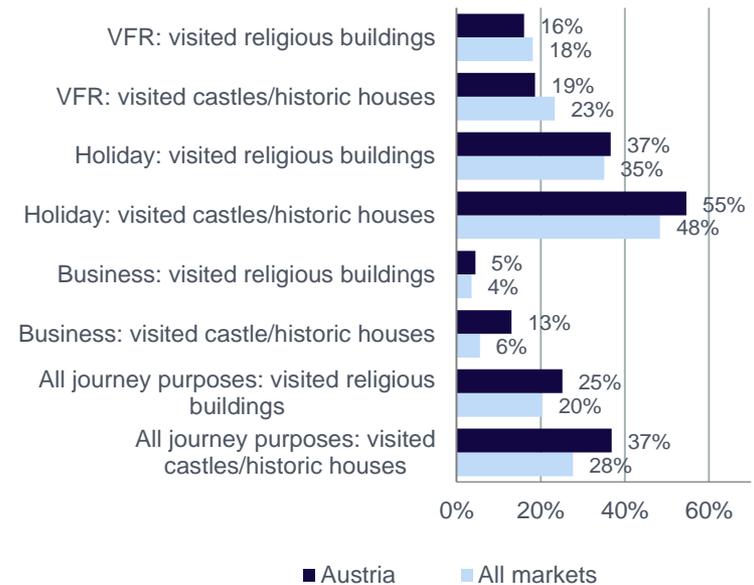


1.4 Inbound activities

Propensity to visit museums and galleries



Propensity to visit built heritage sites

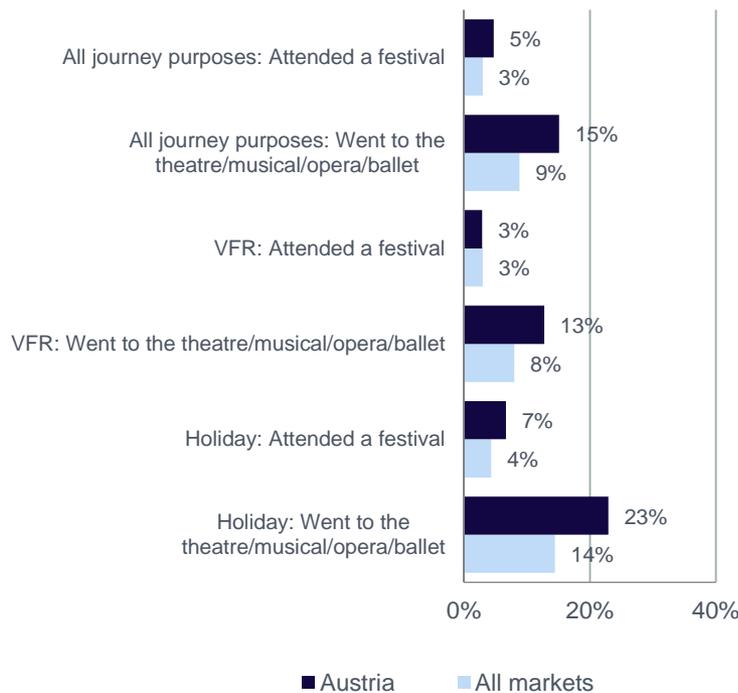


Source: International Passenger Survey by ONS 2016, may be based on small base

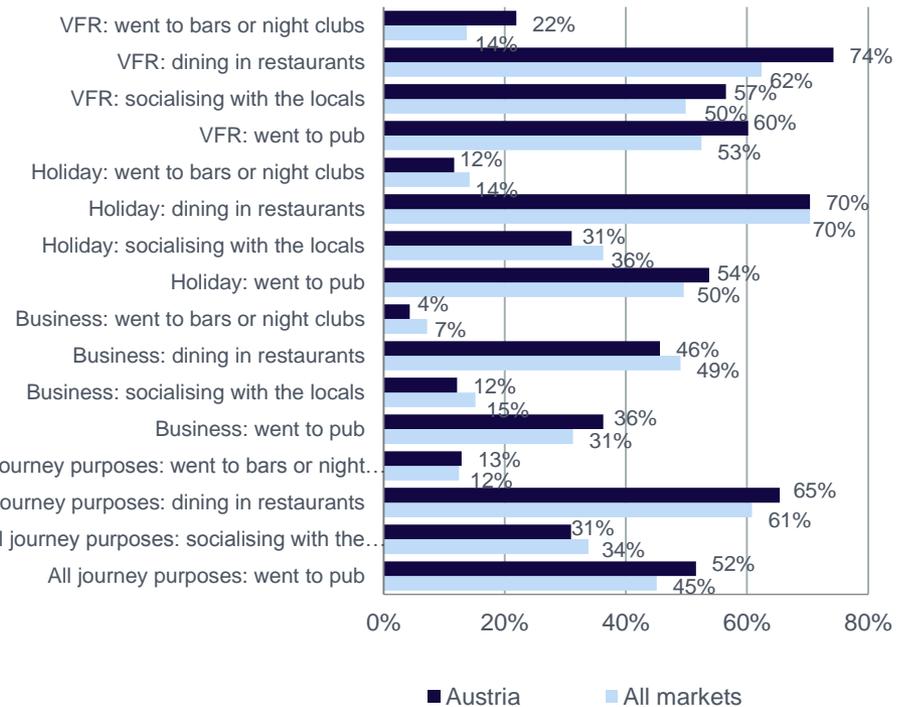


1.4 Inbound activities

Propensity to attend the performing arts



Propensity to go to restaurants, pubs, night clubs and socialise with locals

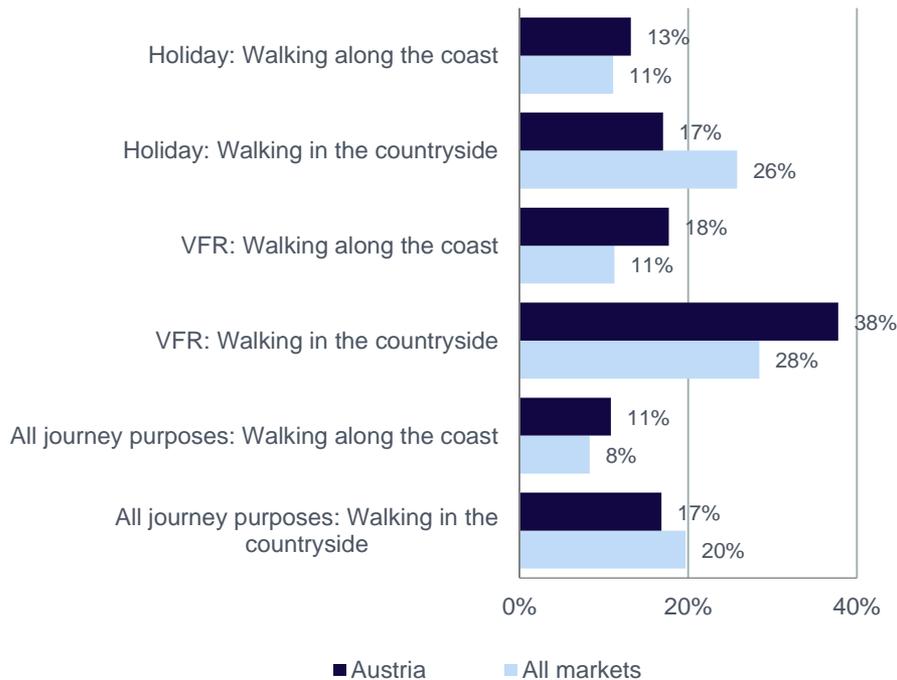


Source: International Passenger Survey by ONS 2007, 2008, 2011 and 2016, may be based on small base

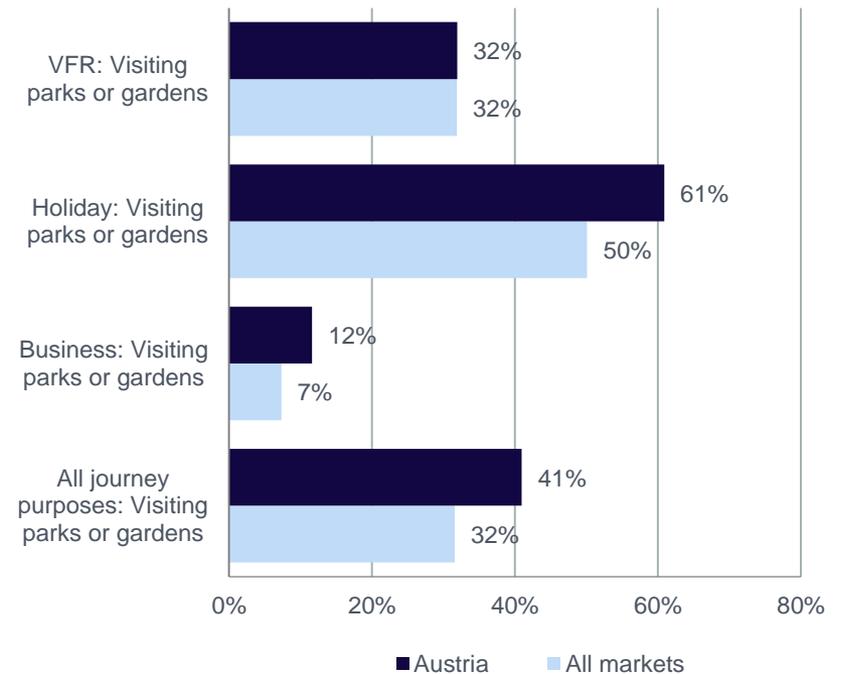


1.4 Inbound activities

Propensity to go for a walk



Propensity to visit a park or garden

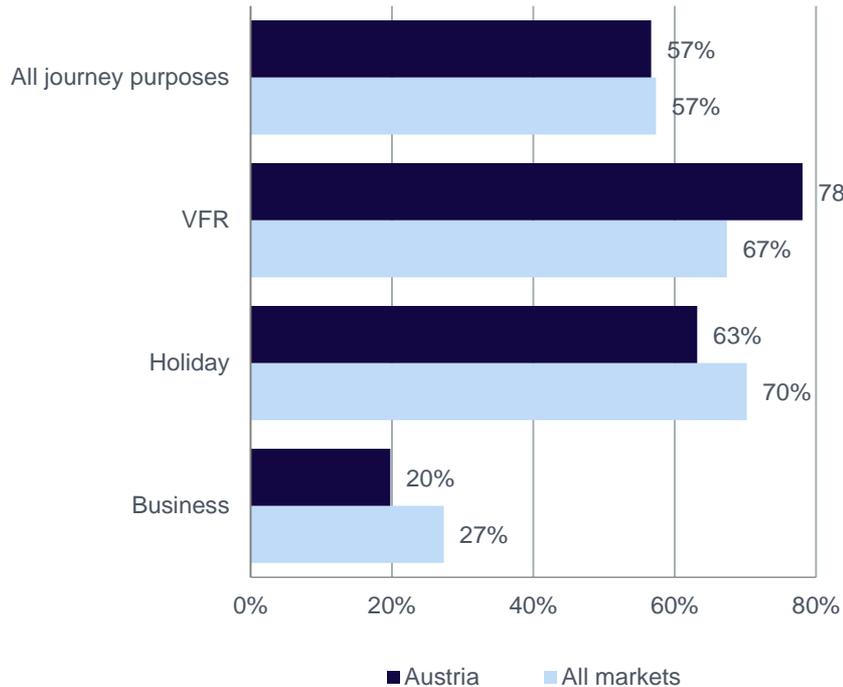


Source: International Passenger Survey by ONS 2007, 2010 and 2016, may be based on small base

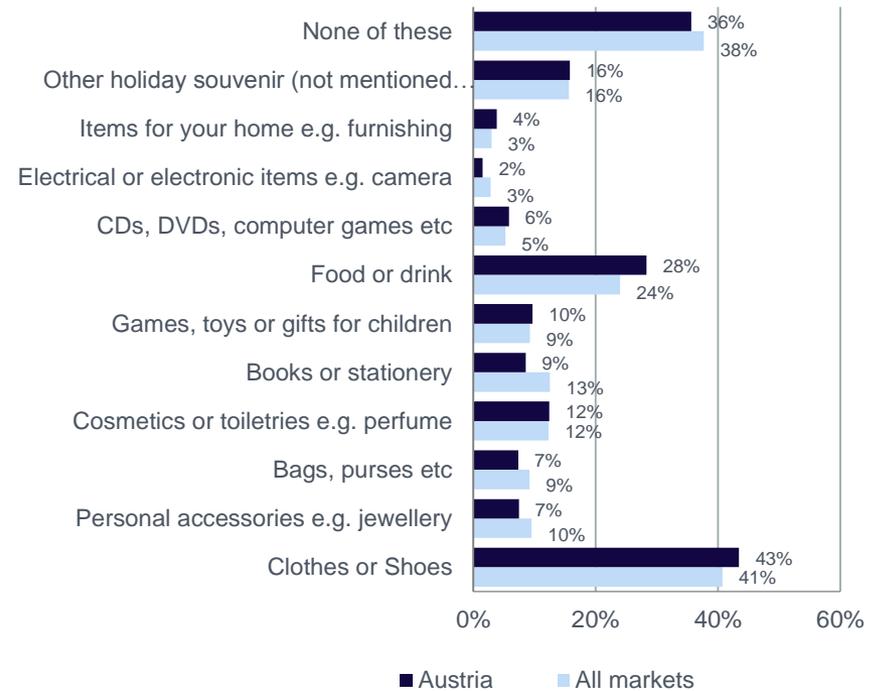


1.4 Inbound activities

Propensity to go to shopping



Propensity to purchase selected items



Source: International Passenger Survey by ONS 2011 and 2013, may be based on small base



Chapter 2: Understanding the market





2. Understanding the market

Chapter summary

- Austria has a population of about 8.7 million.
- Almost four in five Austrians went on at least one holiday in 2016 (domestic and/or outbound).
- More than half of Austrians book their holidays online, but an above-average proportion consults travel agents (more than one in four).
- Recommendations from family, friends and/or colleagues as well as online sources are the most used important information sources for travel decision-making for Austrians. Two in five rely on personal experience.
- Almost 77% of the Austrian resident population (15+ years of age) took at least one holiday trip in 2016 (domestic and/or outbound).
- Increases in summer holidays taken to relax and unwind and active holidays are key trends among Austrian holidaymakers.
- Many Austrians consume Austrian media but also German and Swiss media due to the shared language.



Culture, sightseeing and city trips

Most stated travel motivations for Austrian holiday-makers

Source: Flash Eurobarometer 432 by EC 2016, Bundesanstalt Statistik Österreich *Tourismus in Zahlen* 2016,



2.1 Structural drivers

Demographics & society

- Population of about 8.7 million.
- Austria is governed as a federal parliamentary republic.
- There are 9 Bundesländer (federal states): Burgenland, Kärnten (Carinthia), Niederösterreich (Lower Austria), Oberösterreich (Upper Austria), Salzburg, Steiermark (Styria), Tirol (Tyrol), Vorarlberg and Wien (Vienna).
- Most of the Austrian population lives in the Northern and Eastern parts of the country. About two thirds of Austrian residents live in urban areas.
- German is the official language nationwide. Some regions recognise additional languages as further official languages: Croatian and Hungarian in Burgenland and Slovene in South Carinthia. Many Austrians (especially younger generations) have good command of the English language as a result of their education in school.
- Austrian employees are entitled to a minimum of five weeks of paid annual leave.



Source: Oxford Economics, CIA World Factbook 2018, [EURES](#) 2018



2.1 Structural drivers: population and economic indicators

Population dynamics

Measure	2017 estimate
Total population	8,693,000
Median age	44
Average annual rate of population change in 2017 - 2022	0.5%

Economic indicators

Indicator (annual growth rate unless stated otherwise)	2017	2018	2019
Real GDP	3.1%	2.5%	1.6%
Consumer spending	1.5%	1.9%	2.0%
Unemployment rate	5.5%	5.2%	5.0%
Wage index	1.8%	1.9%	2.5%
Consumer prices	2.1%	1.8%	1.8%

Source: Oxford Economics, CIA World Factbook 2018



2.1 Structural drivers: general market overview

General market conditions

- Austria was Britain's 22nd largest source market in terms of visits and 32nd most valuable for visitor spending in 2016.
- The Austrian economy went from strength to strength in 2017, expanding at its fastest rate over the past decade and, with annual real GDP growth of 3.1%, outperforming the Eurozone average. The forecast for 2018 is also positive with GDP predicted to grow by 2.5%, although slightly softer than in 2017.

Consumer sentiment remains positive, boosted by a strong labour market.

- The country has a population of just under 9 million which is forecasted to grow further over the next 5 years. The Austrian median age is 44.
- Most Austrians enjoy a high standard of living and are well educated. Real GDP per capita in purchasing power parity terms of US\$45,100 which is higher than the Eurozone average.
- According to the Capgemini World Wealth Report there were 133,000 High Net Worth Individuals (HNWI) resident in Austria in 2016, these being people with investible assets worth more than \$1 million, an increase of 10% on 2015. Austrian HNWIs represent the 22nd largest HNWI population globally.

Key demographic and economic data

Measure (2017 data)	Austria	Eurozone
Population (m)	8.7	337.7
GDP per capita PPP (US\$)	45,100	38,994
Annual average GDP growth over past decade (%)	0.9	0.6
Annual average GDP growth in 2017 (%)	3.1	2.5

Source: Oxford Economics, CIA World Factbook 2018, Capgemini World Wealth Report 2017



2.1 Structural drivers: exchange rate trends

Exchange rate trends (cost of GBP in EUR)



Please find the most up-to-date exchange rate trend based on monthly averages at visitbritain.org/visitor-economy-facts.

Source: Bank of England



2.2 Consumer trends

- Just over half of all holiday trips taken by Austrian residents aged 15 or over in 2016 were domestic trips with 10 million such trips. Almost 77% of the Austrian resident population (15+ years of age) took at least one holiday trip in 2016 (domestic and/or outbound). Steiermark, Salzburg and Tirol are among the most popular domestic destinations.
- Austrians took almost 20 million holiday trips in 2016 (up 10% on 2015, both domestic and/or outbound). Slightly more than half of these holiday trips lasted between one and three nights. Business trips make up a smaller share of the market with almost 4 million trips taken for this purpose in 2016, marginally up by 2% year-on-year. Almost ¾ of Austrian business trips last between one and three nights.
- Neighbouring countries and destinations in the Mediterranean count among the most popular for Austrian outbound travel.
- Increases in summer holidays taken to relax and unwind and active holidays are key trends among Austrian holidaymakers.

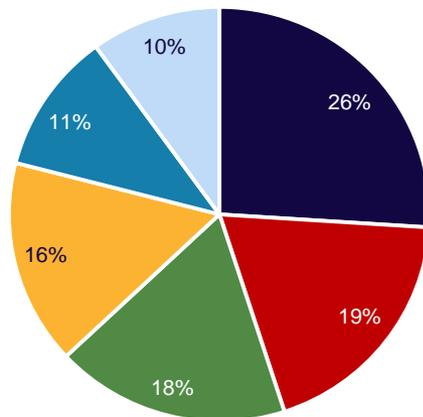
Almost 77%
of residents in Austria
(aged 15+) took at
least one holiday trip
in 2016

Sources: Bundesanstalt Statistik Österreich Tourismus in Zahlen 2016, Bundesamt für Statistik Österreich "Reisegewohnheiten"



2.2 Consumer trends: overall travel trends

Most important motives for Austrians for taking a holiday abroad in 2016



- Cultural, sightseeing, city trip
- Beach holidays
- Visits to friends and relatives
- Relaxation holidays
- Active holidays
- other holiday motivations

As the third quarter of the year is the most popular time of travel for Austrians, the following section takes a look at their summer holiday preferences:

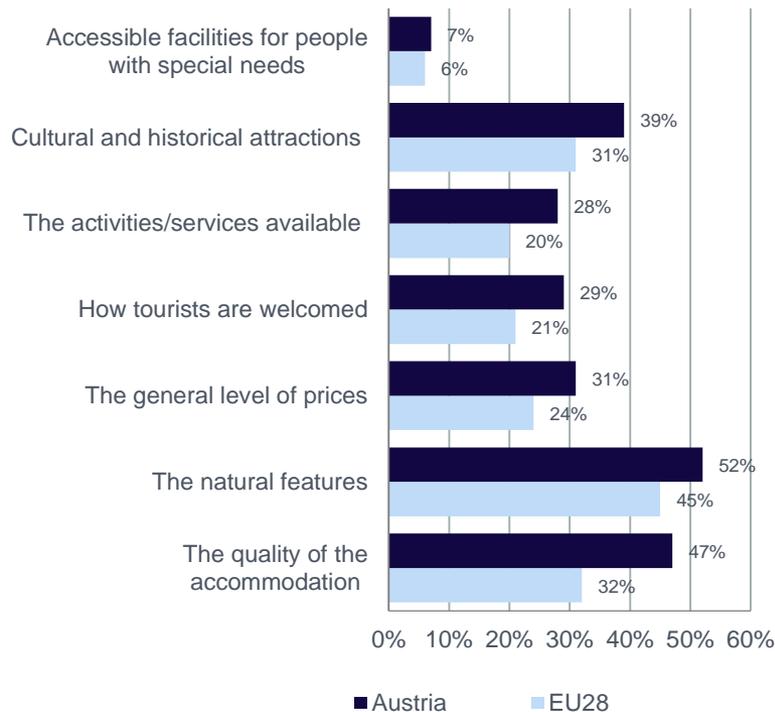
- For summer holidays abroad, trips to relax and unwind have increased in popularity while the demand for a classic beach holiday slightly declined in summer 2017.
- Active holidays have become increasingly popular among Austrian holidaymakers: in summer 2017 they had been the third most popular motivation to take a holiday (18%). This share rises to roughly every fourth trip when looking at the domestic holidays of Austrians in summer 2016.
- Neighbouring countries and destinations in the Mediterranean count among the most popular for Austrian outbound travel. Two in three summer holiday trips in 2017 have been taken with a car, followed by flights and train/coach travel.

Source: Bundesanstalt Statistik Österreich "Auslandsurlaubsreisen: Die wichtigsten Reisemotive 2016" (27.04.2017), Bundesanstalt Statistik Österreich [Tourismus in Zahlen 2016](#)



2.2 Consumer trends: motivation and attitudes to holidays

Reasons to return to the same destination for a holiday



Source: Flash Eurobarometer 432 by EC 2016: : Which of the following would make you go back to the same place for a holiday? Firstly? And then?, Bundesanstalt Statistik Österreich [Tourismus in Zahlen 2016, Urlaubs- und Geschäftsreisen 2016](#)

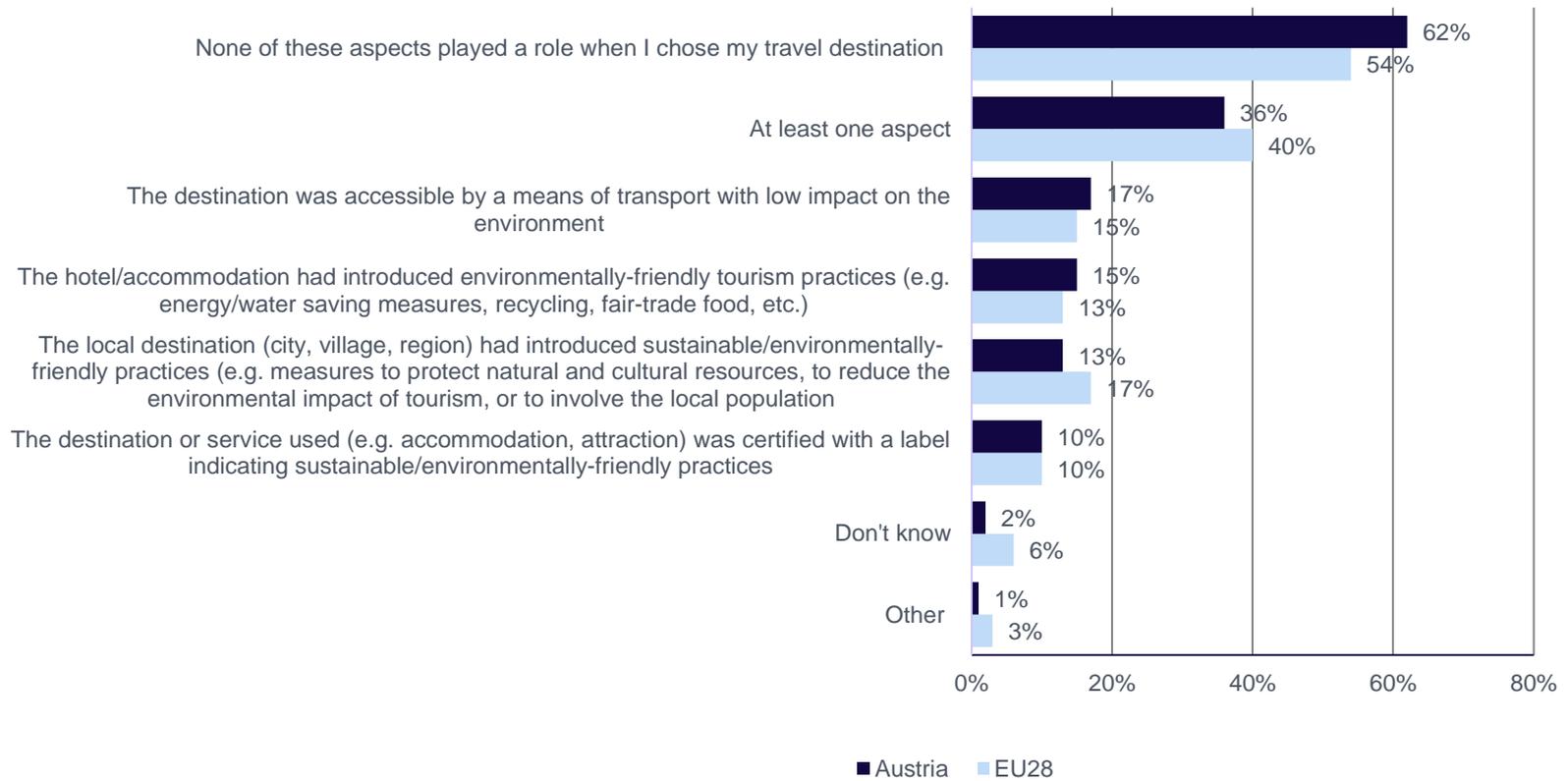
Motivation and attitudes to holidays

- The majority of Austrians said that they were unlikely to amend their holiday plans due to the economic situation (77%) and only 8% said that they go on holidays in 2016 but were likely to spend less. This shows an impact of the economic situation on holiday plans which is well below the European average.
- Hotels and similar are the most popular accommodation for holiday trips (53%, slightly higher for trips abroad with 57%), followed by staying for free with friends/relatives in the destination (27%).
- Asked for reasons which would make them come back, 52% of Austrians value natural features and almost half stated the quality of the accommodation. About two in five agreed that cultural and historical attractions would be a reason to return. All factors listed received above-European average agreement from Austrian respondents.
- Austrians have a below average propensity to consider aspects of sustainability and environmentally friendly measures when making their destination choice. However, more than a third said that at least one of these aspects played a role for them.



2.2 Consumer trends: sustainability/environment

Role of sustainable/environmentally-friendly aspects when choosing travel destinations



Source: Flash Eurobarometer 432 by EC 2016: Were any of the following aspects relevant for you when you chose the destination(s) to visit during your main holiday in 2015? (max. 3 answers)



2.3 Booking and planning

- Most Austrian travellers are comfortable using online services to make their holiday bookings, with over half using an online service to book their holiday, slightly above the European average. Within this, 46% use services such as tour operator or airline websites.
- More than one in four booked their holiday over the counter at a travel agency, well above the European average. Almost one in five booked over the phone.
- Whilst the majority of summer holidays are self-organised, the share of trips booked fully or partly through travel agents or tour operators has increased over the last decade, particularly for summer holidays going abroad.

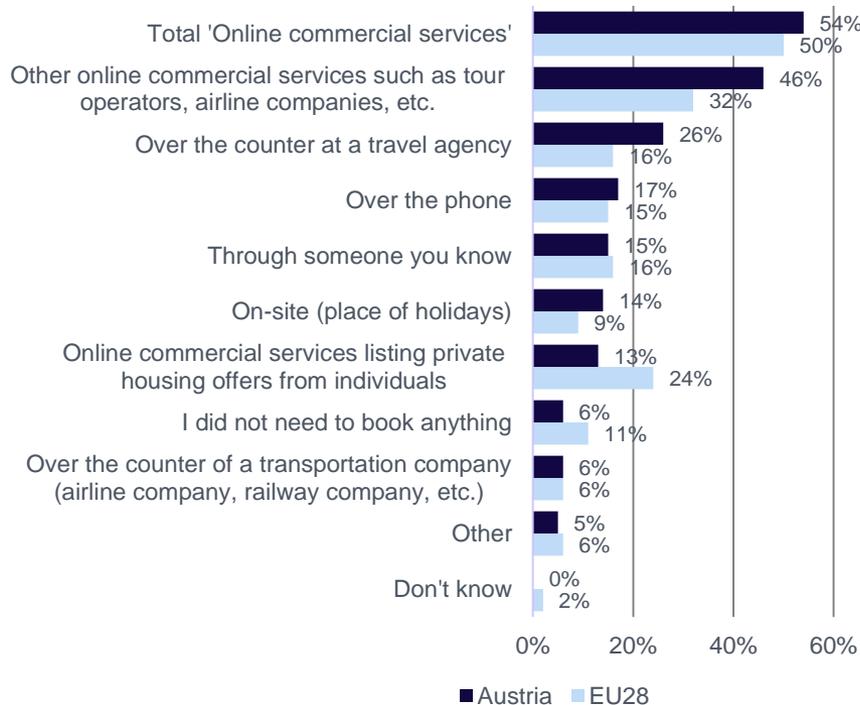
More than half
of Austrians book their
holidays online

Source: Flash Eurobarometer 432 by EC 2016: Did you book your holiday in 2015 by any of the following methods? (multiple answers possible), Bundesamt für Statistik Österreich "[Reisegewohnheiten](#)"



2.3 Booking and planning: booking channels

Methods used to book a holiday



- Many Austrians are comfortable using online services to make their holiday bookings. 46% use services such as tour operators or airline websites, which is more than the European average.
- Whilst many use online services, more than one in four booked their holiday over the counter at a travel agency, a propensity well above the European average of 16%. Almost one in five booked over the phone.
- In summer 2017, most holiday trips have been organised individually, i.e. without the help of a travel agency or tour operator (71% of all holiday trips, 59% of trips abroad). Looking at the trend over the last decade, it becomes evident that the number of self-organised trips has slightly decreased for summer holidays. This means the influence of travel agencies and tour operators has increased for partly or fully organised holiday trips (from 19% in 2008 to 29% in 2017, for trips abroad from 31% in 2008 to 41% in 2017).

Source: Flash Eurobarometer 432 by EC 2016: Did you book your holiday in 2015 by any of the following methods? (multiple answers possible), Bundesamt für Statistik Österreich "Reisegewohnheiten Sommer 2017"



2.4 Reaching the consumer

- Three in five Austrians stated that recommendations from friends, colleagues or relatives are one of the most important information sources for travel decision-making, followed by just over half stating online sources.
- Two in five consult websites which provide comments, reviews or ratings written by fellow travellers.
- Two in five rely on personal experience.
- 15% consult guidebooks or magazines they buy.
- Austrians are likely to use Austrian, German and Swiss media due to the shared common language.
- Austrians spend an average of 186 minutes per day on watching TV, a record for any year.
- 85% of the Austrian population have access to the Internet.

**Friends, family
& colleagues**

#1 Influence for the
destination choice
of the Austrians

Source: Flash Eurobarometer 432 by EC 2016, ORF Fernsehnutzung in Österreich 2017, Internetworld Statistics June 2017



2.4 Reaching the consumer: broadcast media, radio, newspapers and magazines

Many Austrians use Austrian, German and Swiss media due to the shared common language. Please also refer to the [German](#) and [Swiss](#) market profiles for more details on the media landscape.



Broadcast media

The Austrian Broadcasting Corporation (ORF) is Austria's largest media provider, operating four national television and twelve radio channels, as well as a comprehensive range of website

- The main target group of “ORF eins” tends to be young, cosmopolitan, and urban audiences.
- ORF2 addresses a more mature and traditional audience, broadcasting in-depth information, documentaries, and debates.

In cooperation with the public service broadcasters of Germany and Switzerland (ARD, ZDF, SRG, SRF), ORF also operates the special-interest channel 3Sat, which specialises in culture and science.



Radio

- Three national radio channels plus ORF's regional studios in the nine Austrian Federal Provinces produce their own radio programmes around the clock.



Newspapers/ Magazines

- There were 16 dailies in Austria in 2016* (3 of them were free), 252 weeklies (176 of which were free) and 62 magazines.
- Kronen Zeitung has the widest readership, reaching 19% of the Austrian population, followed by the free newspaper Heute which reaches 13% of Austrians (938,000 people).



Source: *ORF The Austrian Broadcasting Corporation 2017, ORF Fernsehnutzung in Österreich 2017, Verband Österreichischer Zeitungen Marktdaten*
*WirtschaftsBlat ceased being published in September 2016



2.4 Reaching the consumer: online media and social media



Online media

- 85% of the Austrian population have access to the Internet.
- Around 10% of Austrian consumers regularly read e-paper versions of newspapers or a magazine, most commonly via laptop (80%) or smartphone (73%).

Social media

- Austrians have a lower propensity to use social media than many other markets with penetration of 56% (amongst Internet users 16-74 years of age), below the EU average of 63% in 2016.
- Facebook and WhatsApp are the most popular platforms. Facebook had 3.6 million users in June 2017 according to Internetworld Statistics.

Top Social Media and Messenger Brands

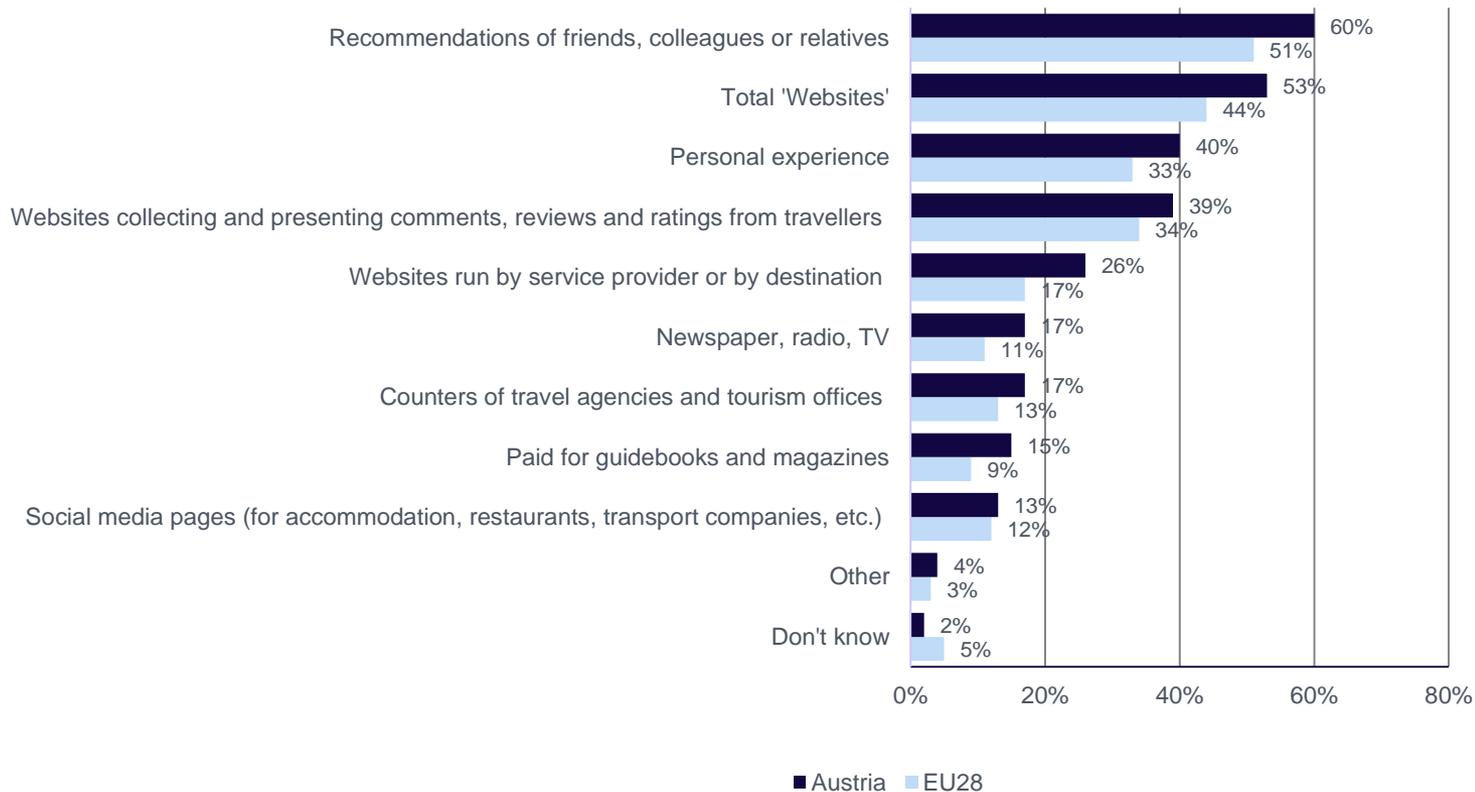
Brand	For news	For any use
Facebook	34%	63%
YouTube	16%	59%
WhatsApp	16%	63%
Facebook Messenger	5%	29%
Twitter	4%	11%

Source: *Eurostat 2017, Reuters Institute Digital News Report 2017, mnews by Medianet Verlag, Internetworld Statistics June 2017*



2.4 Reaching the consumer: influences

Influences on decision-making about travel plans



Source: Flash Eurobarometer 432 by EC 2016: Which of the following information sources do you think are most important when you make a decision about your travel plans? (max. 3 answers per respondent)



Chapter 3: Access and travel trade





3. Access and travel trade

- Access to Britain is easy. In 2016, 94% of Austrians visits were by plane.
- Annual airline seat capacity has grown strongly in recent years. British Airways, EasyJet and Austrian provided roughly $\frac{3}{4}$ of annual flight seat capacity in 2017. A large proportion of the annual seat capacity comes in on the Vienna – London corridor; however, connectivity to other regional airports helps with the regional spread of Austrian visits in the UK.
- Austria still has a fairly traditional trade structure and travel agencies (either owned by the major tourism groups or independent) play a fairly strong role. Most trade partners can be found in Vienna.
- Many German tour operators are also active in the Austrian market. Contracting for Britain programmes is often handled by head offices in Germany.
- The large tour operators research their main season programmes between April and June. Some may visit Britain during this time to contract accommodation and visit new attractions / regions / products to be included.

94%

of visits to Britain from
Austria came by plane
in 2016

Source: Apex Rdc 2017: non-stop flights only, International Passenger Survey by ONS



3.1 Access: key facts

- 94% of visits from Austria came to the UK by plane in 2016.
- Annual airline seat capacity has grown strongly in recent years. British Airways, EasyJet and Austrian provided roughly $\frac{3}{4}$ of annual flight seat capacity in 2017.
- A large proportion of the annual seat capacity comes in on the Vienna – London corridor; however, connectivity to other regional airports helps with the regional spread of Austrian visits in the UK.
- Austrian visitors departing Britain by air currently pay £13 in Air Passenger Duty.

◀ **Virtually all visits from Austria came to the UK by plane.**

Access to Britain

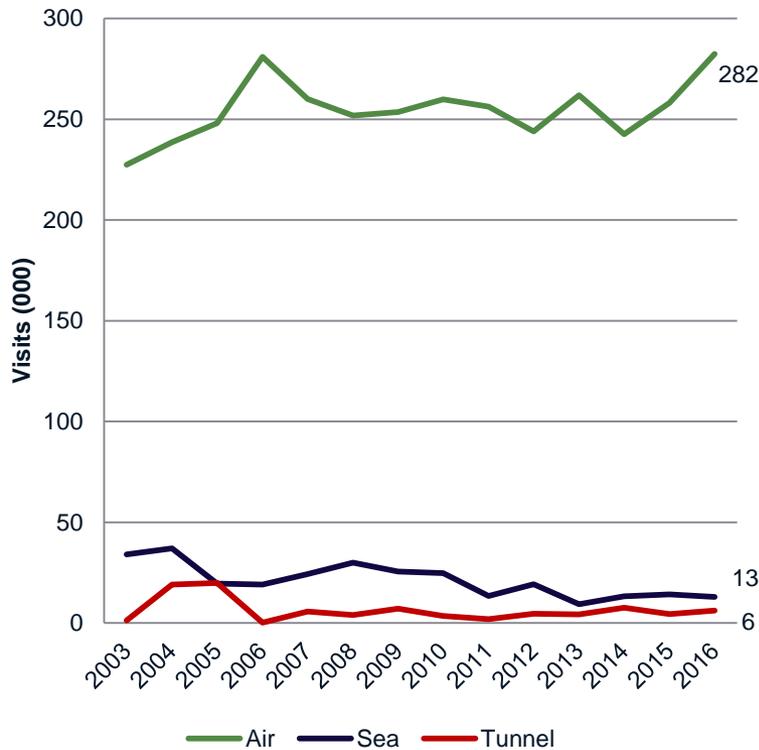
Measure	2017
Weekly aircraft departures	154
Weekly aircraft seat capacity	25,376
Airports with direct routes in Austria	6
Airports with direct routes in Britain	16

Source: International Passenger Survey by ONS, Apex RdC 2017: non-stop flights only



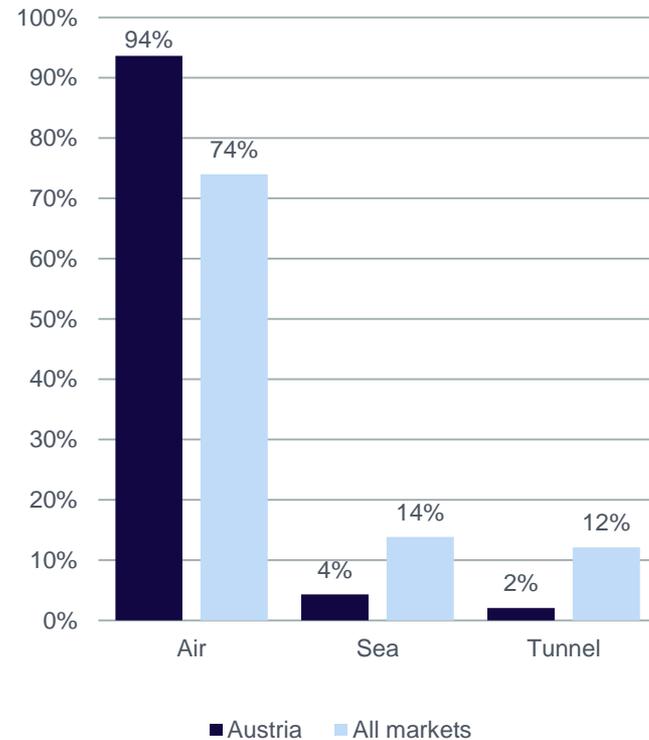
3.1 Access: mode of transport

Visits by mode of transport



Source: International Passenger Survey by ONS

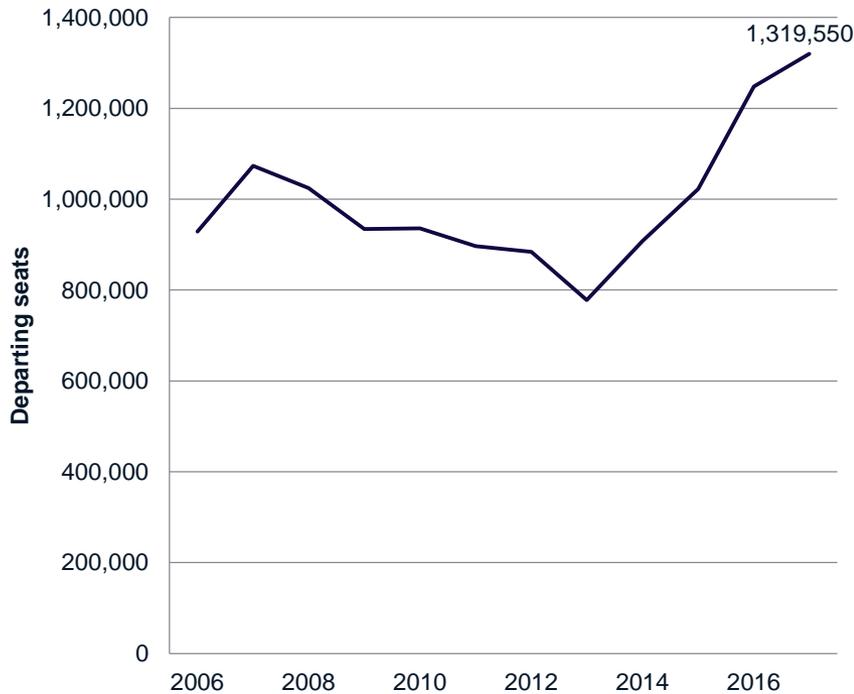
Annual share of visits by mode (2016)





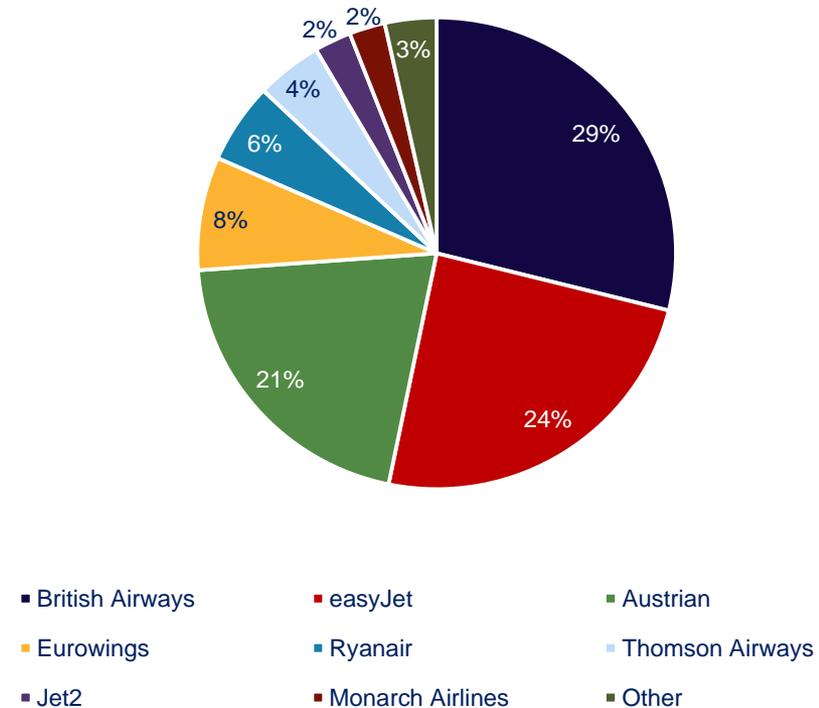
3.1 Access: capacity

Annual airline seat capacity trends



Source: Apex Rdc 2017: non-stop flights only

Airline seat capacity by carrier (2017)

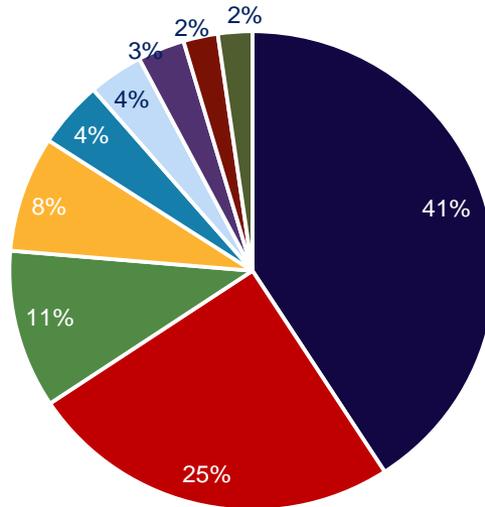


*Airlines grouped in 'Other': Thomas Cook Airlines, Flybe, bmi Regional, TUI Airways, Norwegian Air International and Aer Lingus



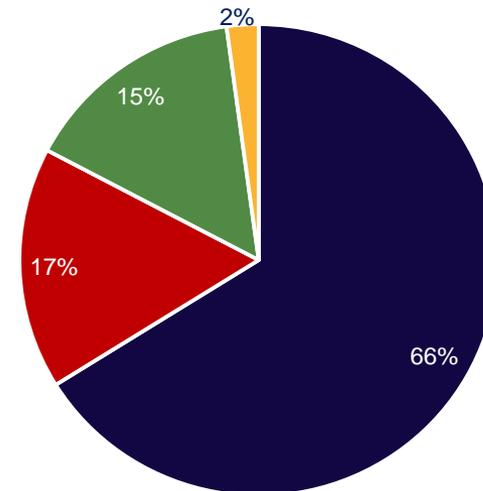
3.1 Access: capacity

Destination airport annual seat capacity



- London - Heathrow
- London - Gatwick
- London - Stansted
- Manchester International
- Birmingham International
- London - Luton
- Edinburgh
- Bristol
- Other*

Origin airport annual seat capacity



- Vienna International
- Salzburg - W. A. Mozart
- Innsbruck - Kranebitten
- Other**

Source: Apex Rdc 2017: non-stop flights only

*Airports with less than 2% annual seat share grouped in other: London Southend, East Midlands, Newcastle, Leeds/Bradford, Liverpool John Lennon, Glasgow International, Belfast City and Belfast International
 **Airports with less than 2% annual seat share grouped in other: Linz, Graz, Klagenfurt



3.2 Travel trade: general overview

- Austria still has a fairly traditional trade structure and travel agencies (either owned by the major tourism groups or independent) play a fairly strong role. The vast majority of trade is based in Vienna, a city that has an excellent integrated public transport system.
- The main German tourism groups TUI, Thomas Cook, Rewe and FTI are very active in Austria. Contracting for their Britain programmes in Austria is handled by their respective head offices in Germany.
- In addition there are some independent local players with Britain programmes: Prima Reisen, Kneissl Touristik and Verkehrsbüro Group. Dodotours is a small specialist operator for Britain & Ireland.
- All major German package wholesale companies for group and coach travel (for example Service Reisen, Grimm Touristik, Hotels & More) also sell their products in Austria.
- The large tour operators research their main season programmes between April and June. Some may visit Britain during this time to contract accommodation and visit new attractions / regions / products to be included.

Contracting for main season programmes often happens between April and June.

3.2 Travel trade: Austrian tour operators

Major tour operators active in Austria
(in alphabetical order)

Alltours	
Eurotours	
FTI Austria	
Jumbo/Ruefa	
REWE Austria	ITS Billa, Jahn, DERTOUR, Meier´s WR
Thomas Cook	Neckermann
TUI Österreich	TUI, GULET, Terra

Major tour operators with a Britain programme are:

REWE Austria Touristik



Source: ÖRV FAKTEN UND ZAHLEN ÖSTERREICHISCHER REISEMARKT 2016



3.2 Travel trade: Austrian holidays

Public holidays

National public holidays in 2018

Date	National Holiday
1 January	New Year's Day
6 January	Epiphany
2 April	Easter Monday
1 May	Labour Day
13 May	Ascension Day
21 May	Whit Monday
31 May	Corpus Christi
15 August	Assumption Day
26 October	National Day
1 November	All Saints Day
8 December	Immaculate Conception Day
25 December	Christmas Day
26 December	St. Stephens Day

Source: [School Holidays Europe](#)

Austrian school holidays in 2018*

Date	Local/School Holiday	Region
24 December - 6 January	Christmas holidays	All regions
5 February - 10 February	Spring break	Vienna, Vorarlberg, Niederösterreich
12 February - 17 February	Spring break	Burgenland, Kärnten, Salzburg, Tirol
19 February - 24 February	Spring break	Oberösterreich, Steiermark
24 March - 3 April	Easter holidays	All regions
19 May - 22 May	Whitsun holidays	All regions
30 June - 2 September	Summer holidays	Burgenland, Niederösterreich, Vienna
7 July - 9 September	Summer holidays	Tirol, Vorarlberg, Kärnten, Salzburg, Oberösterreich, Steiermark
24 December - 6 January	Christmas holidays	All regions



3.2 Travel trade: practical information

General practical information:

- Business hours are usually 09:00 – 18:00 as standard.
- A firm handshake is the most traditional form of greeting. Titles are important and denote respect. You should say Herr or Frau and the person's title and their surname until invited to use their first name. In general, when entering a room, shake hands with everyone individually.
- Titles are highly important in Austria and denote respect.
- Check your trip does not coincide with a public holiday as many Austrians take a long weekend around these, especially in the spring and summer. Check whether there is a large trade fair happening in the city you are visiting, as it may be impossible to find a hotel room.
- Punctuality is taken very seriously by Austrians. If you expect to be delayed, telephone and offer an explanation. It is considered rude to cancel a meeting at the last minute and it could jeopardize your business.
- Dress code: Business dress tends to be understated and conservative.
- Business Meeting Etiquette: Appointments are mandatory and should be made one to two weeks in advance. An introductory email or letter is essential (not necessarily in German) with relevant background information. Most meetings are formal and initial meetings are used to get to know each other. Meetings tend to adhere to strict agendas, including starting and end times. At the end of a meeting, some Austrians signal their approval by rapping their knuckles on the table.
- Communication tends to be formal and you should expect written communication, both to back up decisions and to maintain a record of decisions and discussions. Following the established protocol is critical to building and maintaining business relationships. Once a firm business relationship has been established it is appropriate to relax rules and to become more informal.
- Business often is hierarchical and decision-making is held at the top of the company. Final decisions are translated into comprehensive action steps.
- Make sure your printed material is available in both English and German.



3.2 Travel trade: sales calls

Sales calls

The vast majority of Austrian operators are located in Vienna, a city which has an excellent integrated public transport system. VisitBritain recommends that you take the following steps:

- Most Austrian trade professionals have good command of English. It is still appreciated if you can provide information in German, wherever possible.
- The large tour operators research their main season programmes between April and June. Some may visit Britain during this time to contract accommodation and visit new attractions/regions/products to be include. These programmes tend to be costed between July and September and launched in November/December. Smaller specialist operators most often research their programmes slightly later in July/September for a launch in January/February. Off-season/city break operators research their winter programmes in March/April and launch them in July/August.
- Online tour operators are not bound to a planning cycle.

It is best to avoid scheduling in meetings in July and August, the week before Easter or during the week between Christmas and New Year.

- Keep in touch with VisitBritain; let us know about your progress. Regular market intelligence is essential for our future plans and activities.
- It is also important to note that a significant number of the key Austrian trade attend the VisitBritain's ExploreGB workshop & VisitScotland Expo. Please contact [VisitBritain London](#) for details of those attending. Some operators also visit World Travel Market and ITB.



3.2 Travel trade: practical information

Hospitality etiquette

If there is the opportunity it is definitely a good idea to take your Austrian business partner out for a meal – either to build up a relationship or to thank for business given in the past. Here are some practical tips to help you plan this:

- When choosing a restaurant ensure beforehand that credit cards are accepted or bring enough cash. Many Austrian restaurants do not take credit cards (either cash or debit cards).
- If you order water, you will be asked whether you would like still or carbonated mineral water. It is uncommon to order tap water.
- Service and VAT are included in the menu price in restaurants and bars all over Austria. Still, it is typical to “round up” the amount to some more-or-less round figure. A rule of thumb is to add 5-10%, generally ending with a full Euro amount.
- If you are not paying for all, splitting a bill in Austria is quite common. Simply tell the waiter/waitress when paying what you are paying for, s/he will readily add up your amounts

and present you with a personal total, which you should round up, as explained above. The waiter/waitress is likely to come up at the end of the meal and ask “All together?” or, in German “Zusammen?”



3.3 Caring for the consumer: German language tips

Caring for the consumer

- Very few Austrian visitors expect their British hosts to speak German, with the majority of younger Austrians speaking English.
- Austrian visitors are likely to have planned their itinerary in some detail, but younger visitors may be more spontaneous, but all will welcome local recommendations for things to do and see.
- Austrians often try to find accommodation that has 'character'.
- Vegetarians are often impressed by the range of choices on offer in Britain.

Language basics

English	German
Please	Bitte
Thank you	Danke
Yes	Ja
No	Nein
Sorry! (apology)	Entschuldigung!
Excuse me!	Entschuldigen Sie, bitte!
Sorry, I do not speak German.	Entschuldigung, ich spreche leider kein Deutsch.



3.3 Caring for the consumer: German language tips

Language tips for arrival and departure

English	German
Hello	Hallo
My name is...	Ich heie...
Welcome to Britain	Willkommen in Grobritannien
Pleased to meet you!	Ich freue mich Sie kennenzulernen.
How are you?	Wie geht es Ihnen?
Enjoy your visit!	Genieen Sie Ihren Aufenthalt!
Goodbye!	Auf Wiedersehen!
Did you enjoy your visit?	Hatten Sie einen schnen Aufenthalt?
Have a safe journey home!	Ich wnsche Ihnen eine sichere Heimreise!
Hope to see you again soon!	Auf ein baldiges Wiedersehen!



3.4 Working with VisitBritain

We can help you extend your reach through:

- Digital and social media such as through Twitter, our Facebook page – Love GREAT Britain, or Pinterest.
- Press and PR by sending us your newsworthy stories or hosting our journalists and broadcast crew
- Leisure, and the business travel trade via our programme of sales missions, workshops and exhibitions or promotion to our qualified Britagents and supplier directory
- Print advertising in targeted media/Britain supplements
- Retailing your product through the VisitBritain shop
- Or as a major campaign partner

We are here to support you and look forward to working with you.

To find out more browse our opportunity search (visitbritain.org/opportunities) or trade website (trade.visitbritain.com) or contact the B2B events team (Email: events@visitbritain.org) or campaign partnerships team (Email: partnerships@visitbritain.org) or trade support team (Email: tradesupport@visitbritain.org)



3.5 Useful research resources

We have dedicated research and insights available which include:

- Latest monthly and quarterly data from the International Passenger Survey by ONS (visitbritain.org/latest-monthly-data visitbritain.org/latest-quarterly-data-uk-overall visitbritain.org/latest-quarterly-data-area)
- Inbound Tourism Trends by Market visitbritain.org/inbound-tourism-trends
- Sector-specific research visitbritain.org/sector-specific-research
- 2017 Inbound Tourism Forecast visitbritain.org/forecast
- Britain's competitiveness visitbritain.org/britains-competitiveness

We are here to support you and look forward to working with you.

To find out more about the Austrian or other inbound markets browse our markets & segments pages or (visitbritain.org/markets-segments) our inbound research & insights or (visitbritain.org/inbound-research-insights) contact us directly (Email: research@visitbritain.org)



Market and Trade Profile: Austria

May 2018