

Danube river cruises: Impacts on the tourism industry of Vienna

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Abstract

The aim of the project “**Danube river cruises: Impacts on the tourism industry of Vienna**” was to provide a description of the current impacts of river cruise tourism in Vienna and to identify potential insights for guiding decision-making for service providers, industry associations, involved businesses and city planners. The design of the project activities was based on a thorough analysis of existing literature and the current needs of various stakeholders involved in river cruises in Vienna. The activities revolved around three primary objectives – to provide an overview of the main stakeholders related to operations of river cruises and the structure of their relationships, to estimate the economic value of the on-shore spending of river cruise guests in Vienna and to describe the spatial behavior of river cruise guests in Vienna. The findings of the project were then holistically discussed and used for providing general recommendations for future development.

The project identified a substantial network of stakeholders involved in operating river cruises in Vienna, including private entities, bodies controlled by the City of Vienna and the Austrian federal government. While a good number of stakeholders are based in Vienna, leakages were found, especially in terms of providing food supplies, but also in the provision of incoming tourist services to cruise operators. The relationships between stakeholders were described as complex and dense but flexible and thus robust to changes in the environment.

The project concluded that there is a great lack of data on river cruises in Vienna, partially due to the absence of a centralized way of collecting and reporting statistical figures on the topic. Several organizations are involved in recording and estimating the number of arrivals, yet these numbers vary significantly. Based on the collected information and expert interviews, it was estimated that the individual on-shore spending of the almost 500,000 river cruise passengers (excluding on-shore activities booked on-board of cruise vessels, such as guided tours, concerts, wine tastings) in Vienna in 2016 resulted in a direct and indirect value added of between 8 and 10 Million EUR. This estimation was based on spending values of cruise guests on food, souvenirs, transport, museums and attractions and other services and products in the city. It must be noted that significant variance in spending amounts was found among guests from various countries. Thus visitors from the United States, Australia, and New Zealand on average had significantly higher expenses than their counterparts residing in Europe.

A GPS tracking study of 120 river cruise passengers on vessels docking at Reichsbrücke showed that guests tend to follow the main routes led by tour guides and concentrate their movements within the limits of the Inner City, particularly along the edges of the triangle between the State Opera, the Hofburg, and Stephansplatz. The St. Stephen Cathedral was found to be the most visited tourist attraction, while Schönbrunn Palace was visited by a surprisingly small fraction of cruise visitors. The Belvedere Palace and Gardens were identified as a currently not popular but potentially interesting location for guiding crowds of river cruise passengers with the aim of easing the pressure on the downtown area. Additionally, the development of the river front and investing into tourism-

oriented improvements on the Danube Island and Kaisermühlen / Danube City are expected to lead to more activities and spending of cruise passengers in these areas.

The findings of the project have led to the main conclusion that mutually beneficial development of river cruises requires a close collaboration between city planners, tour guides, service providers and cruise organizers. Cruise passengers are one of the largest groups of organized tourists in Vienna and their behavior can be easily influenced by changes in cruise programs. Data has also indicated that cruise guests decide on their spending levels before even arriving at the city or starting the cruise. Tourists that had prepared with specific plans spent on average twice as much as the rest of the passengers studied. It means that increasing the value brought to the city by on-shore spending is possible by encouraging cruise operators to attract groups of cruise guests that are willing to spend more on products and services in Vienna.

The project was completed in August 2017

