



tourism market insights

Austria

WESGRO
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research

September 2021

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1. Overview of Austria

About Austria

Where is Austria?

Austria is located in Central Europe, north of Italy and Slovenia

Population (millions)

8.8 (2021)

Time Difference

South Africa is on the same timeline as Austria.

Language

German is the official language

General Overview

Austria's economy is expected to rebound quickly after GDP contraction in 2020. Annual real GDP declined by 7,3% and unemployment rose to 5,1%

The country's current population is around 9,8 million and with moderate fertility of 1.4 births per female, the median age is rising. It is predicted that the median age will grow from 43.5 years in 2020 to 46.9 years in 2040. longevity improves. 60+ age cohorts will expand at the fastest rate in 2020 – 2040, while most younger groups will decline. As the structure of the population becomes more unbalanced, consumer trends will be impacted as lifestyles and spending habits adapt.

Austrian Millennials are expected to have the highest spending power by 2040. However, those 65+ will remain largest group with an income of USD 250 000 or more and will drive demand for quality health care and leisure activities.

Relatively high rates of net migration in 2020 – 2040 will boost the number of foreign citizens by 56.6%, and by 2040 this group should account for a quarter of the population. Romanians will be the fastest growing foreign group over this period and will form the second largest foreign group, after Germany, in 2040.

2. Overview of the Austrian Travel Market

Austria Travel Market

| | |
|---|--|
| Largest Cities % of total population, number of people | <ol style="list-style-type: none"> 1. Vienna 2. Graz 3. Linz 4. Salzburg 5. Innsbruck |
|---|--|

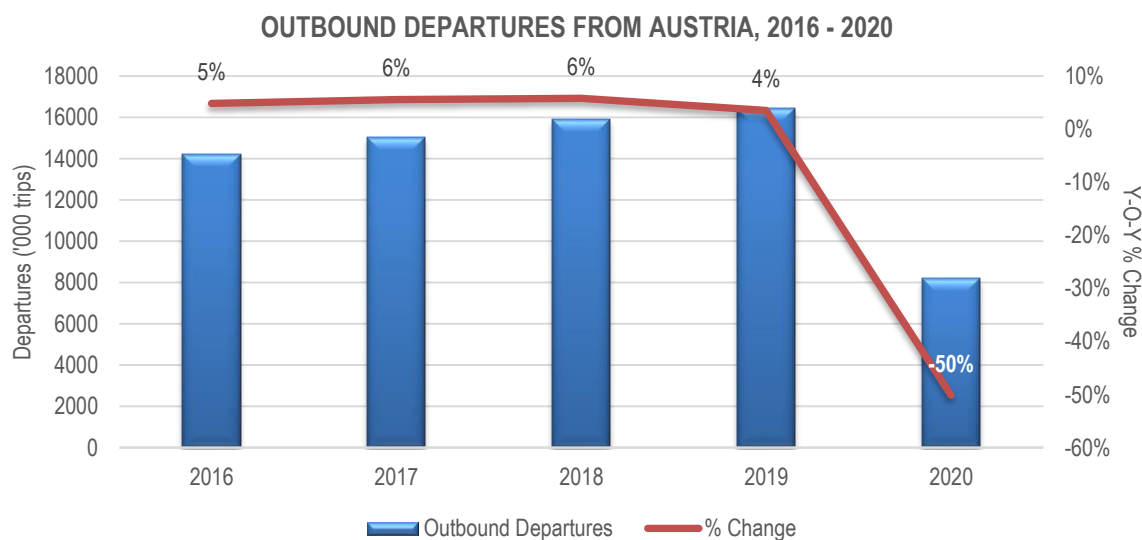
| | |
|------------|------------|
| Median Age | 44.5 years |
|------------|------------|

| | |
|------------------------|------|
| Paid Holidays (2020) | 25.0 |
| Public Holidays (2020) | 13.0 |
| Annual Leave (2020) | 38.0 |

| | |
|----------------------------------|--|
| Outbound Departures ('000 trips) | <ol style="list-style-type: none"> 1. 2018: 15,891.3 2. 2019: 16,450.2 3. 2020: 8,200.8 |
|----------------------------------|--|

| | |
|--|---|
| Top 3 Outbound Destinations ('000 trips, 2020) | <ol style="list-style-type: none"> 1. Italy: 1,744.4 2. Germany: 1,173.8 3. Hungary: 748.1 4. Croatia: 544.6 5. Spain: 524.9 |
|--|---|

| | |
|------------------------|-----------------------------------|
| Type of Outbound Trips | Leisure: 83.4% Business: 16.6% |
|------------------------|-----------------------------------|

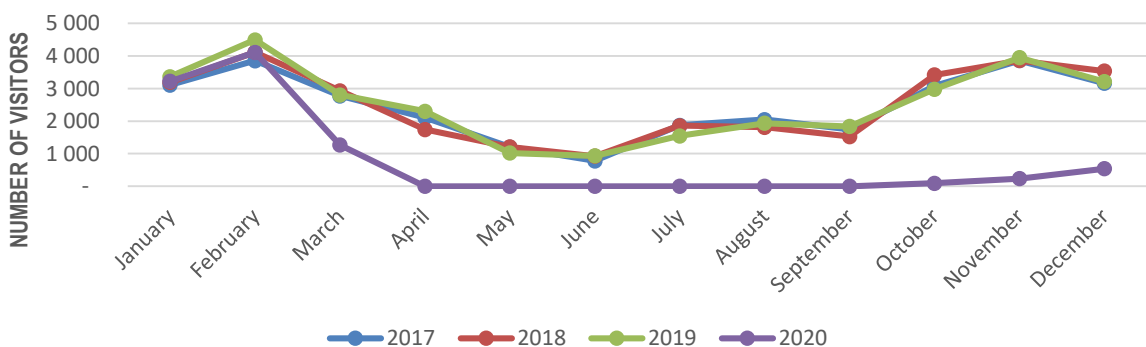


3. The Austrian traveller to South Africa

Austrian Travel Market

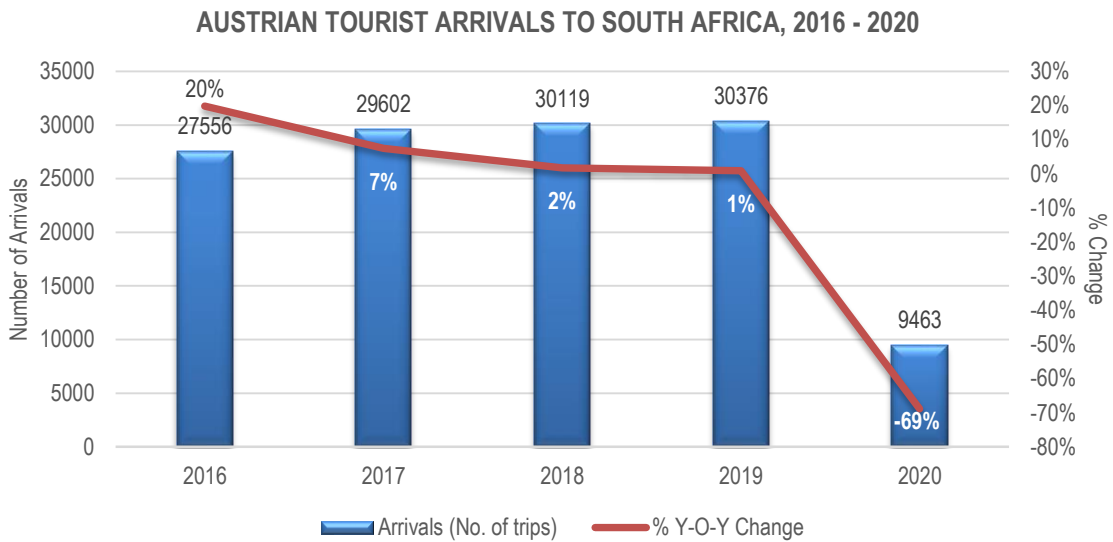
| | |
|--|---|
| Number of Arrivals | 2017: 29 602 2018: 30 119 2019: 30 376 2020: 9 463 |
| Purpose of visit to South Africa (2020) | Holiday (59,1%) VFR (20,2%) Business (7,2%) MICE (5,8%) |
| Average length of stay in South Africa (Number of nights) | 2018: 16,0 2019: 18,0 2020: 16,2 |
| Age profile (2020) | 18 – 24 yrs (21,6%) 25 – 34 yrs (29,6%) 35 – 44 yrs (14,3%) 45 – 54 yrs (11,6%) 55 – 64 yrs (15,3%) 65+ yrs (7,6%) |
| Repeater Rate of Austria Travellers (2020) | 1. First Time: 58,8% 2. 2-3 times: 23,5% |
| Accommodation Usage (2019) | 1. Friends & Family 2. Hotels 3. Guesthouses |
| Total Foreign Direct Spend in South Africa (R in millions) | 2018: R 460 2019: R 739 2020: R 143 |
| Average Spend in South Africa | 2018: R 17 400 2019: R 26 700 2020: R 16 200 |

SEASONALITY PATTERNS: AUSTRIAN TRAVELLERS TO SOUTH AFRICA BY MONTH, JAN - DEC 2017 - 2020



3. The Austria traveller to South Africa

4.1. Visitor Arrivals to South Africa



4.2. Purpose of visit to South Africa

Travellers from Austria to South Africa are predominantly visiting for holiday purposes or to visit family and friends. A fair amount are also visiting for Business and Meetings, Incentives, Conferencing and Events (MICE).

In 2020, Austrian travellers stayed in South Africa for an average length of 16,2 nights

| Top reasons for travel to SA |
|------------------------------|
| Holiday (59,1%) |
| VFR (20,2%) |
| Business (7,2%) |
| MICE (5,8%) |

Average length of stay → **16,2 nights**

4.3. Activities in South Africa

| Top activities undertaken |
|---------------------------------|
| 1. Adventure |
| 2. Wildlife |
| 3. Theme Parks |
| 4. Visiting natural attractions |
| 5. Beaches |

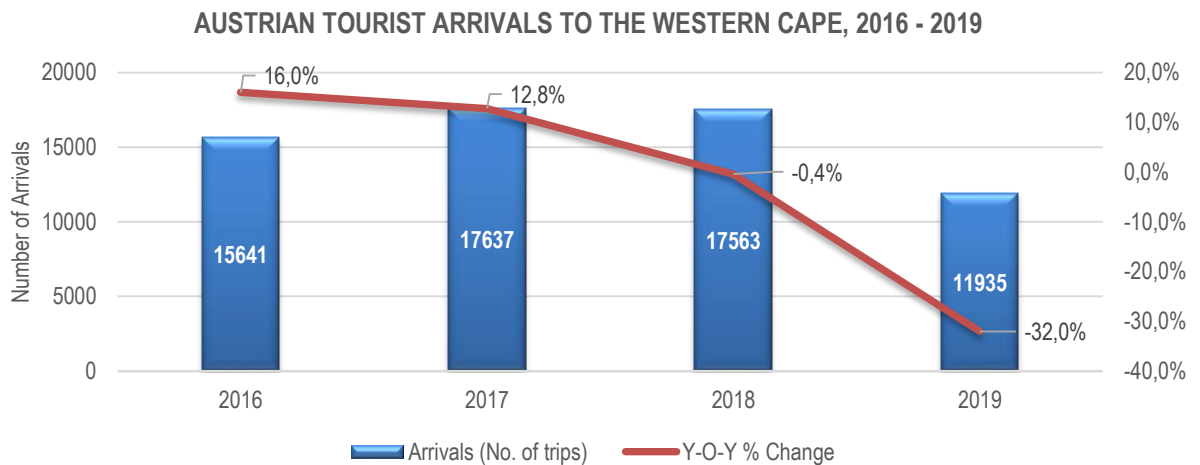
Adventure, wildlife, theme parks, visiting natural attractions, and beaches were among the top activities undertaken by Austrian tourists while in South Africa.

They are more likely to stay with family and friends. Many travellers from Austria also make use of hotel and guesthouse accommodation.

4. The Austrian traveller to the Western Cape

6.1. Visitor Arrivals to the Western Cape

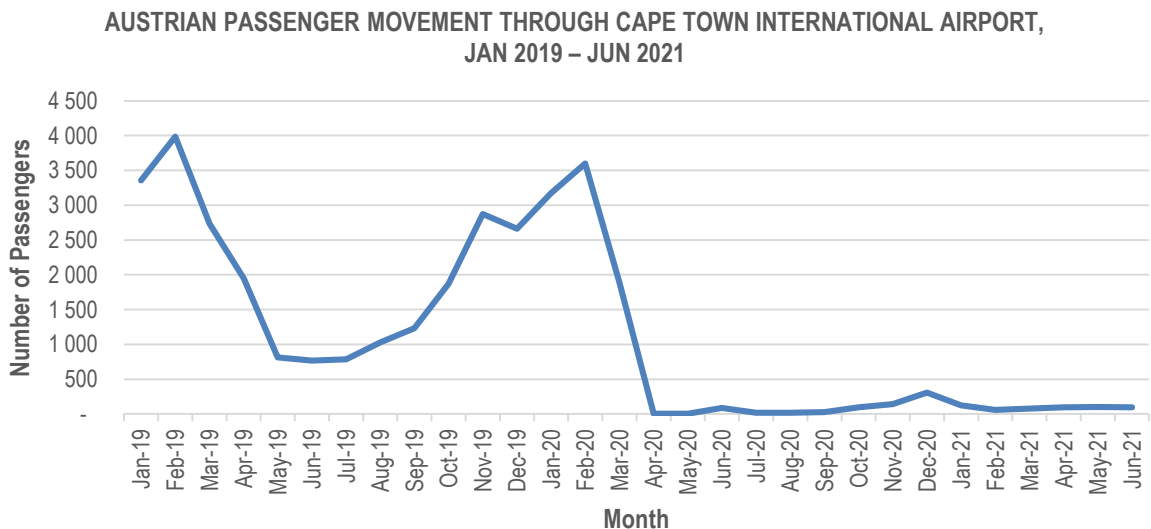
Austrian visitor arrivals to the Western Cape reached its peak in 2017 increasing by 12,8% from its 2016 figure. A decline of less than 1% followed in 2018, and the decrease in tourist arrivals continued into 2019.



Source: South African Tourism, 2021

6.2. Passenger Traffic through Cape Town International Airport

Passengers through Cape Town International Airport from Austria were highest over the period November to February. However, due to travel restrictions brought on by the COVID-19 pandemic, passenger arrivals decreased dramatically throughout 2020 and have remained low into 2021.



Source: OAG Traffic Analyser, 2021

5. Key Findings

- The COVID-19 pandemic has caused sharp declines in both inbound and outbound tourism flows as well as commercial activity across Austria.
- Outbound departures declined by 50%, to 8 200 800 in 2020 from 16 450 200 the previous year.
- Austrian Millennials are expected to have the highest spending power by 2040. However, those 65+ will remain largest group with an income of USD 250 000 or more and will drive demand for quality health care and leisure activities.
- Travellers from Austria to South Africa are predominantly visiting for holiday purposes or to visit family and friends. A fair amount also visited for Business and Meetings, Incentives, Conferencing and Events (MICE) in both 2019 and 2020.
- Austrian travellers stayed in South Africa for an average length of 16,2 nights in 2020.
- Adventure, wildlife, theme parks, visiting natural attractions, and beaches were among the top activities undertaken by Austrian tourists while in South Africa.
- They are more likely to stay with family and friends. Many travellers from Austria also make use of hotel and guesthouse accommodation.
- Austrian passengers through Cape Town International Airport were highest over the period November to February. However, due to travel restrictions brought on by the COVID-19 pandemic, passenger arrivals decreased dramatically throughout 2020 and have remained low into 2021.

6. List of sources

1. South African Tourism
2. Euromonitor International
3. OAG Airline Passenger Traffic Analyser
4. CIA Factbook

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