Challenges for urban destinations.
Dieter Hardt-Stremayr  
CEO  
Graz Tourist Office  
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# Graz Facts

**Capital of the State of Styria**

<table>
<thead>
<tr>
<th>Category</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>citizens (2017)</td>
<td>287,500</td>
</tr>
<tr>
<td>area in km²</td>
<td>128,5</td>
</tr>
<tr>
<td>thereof green space</td>
<td>40%</td>
</tr>
<tr>
<td>students</td>
<td>62,000</td>
</tr>
<tr>
<td>bednights (2017)</td>
<td>1,150,000</td>
</tr>
<tr>
<td>hotelbeds</td>
<td>7,500</td>
</tr>
<tr>
<td>companies/enterprises</td>
<td>17,000</td>
</tr>
<tr>
<td>bridges</td>
<td>15</td>
</tr>
<tr>
<td>opera house</td>
<td>1</td>
</tr>
<tr>
<td>teams in major football league</td>
<td>1</td>
</tr>
</tbody>
</table>
Dieter Hardt-Stremayr
President
European Cities Marketing

Fotos von: Markus Spenger, Tom Lamm, Toni Muhr, Harry Schiffer, Graz Tourismus, Steiermark Tourismus
WELCOME TO
EUROPEAN CITIES MARKETING

European Cities Marketing is a non-profit organisation improving the competitiveness and performance of the leading cities of Europe. ECM provides a platform for Leisure, Meetings Industry and City Marketing professionals to exchange knowledge, best practices and widen their network to build new business.

MEET
SHARE
GROW
tourism ... and more!
our members

• more than 110 cities
• from 36 countries
The ECM Toolbox for Managing Tourism Growth in Europe

The document sets out a range of approaches that Destination Development, Marketing and Management Organisations can take to deal with the pressures of tourism growth. Produced in collaboration with ECM's Knowledge Partner Toposophy, the Toolkit is a useful resource to take, share and discuss with colleagues, political decision makers and industry partners.

5th ECM TIC Expert Meeting

The TIC Expert Meeting offers a mix of incentive and exchange opportunities for all attendees. This is why the diversity of participants is of great importance to us. This event is for managers and TIC front office professionals coming from small and large cities and working for either public or private tourist information organisations – whether they are ECM members or not. This year's meeting will be held in Lviv on October 24-26, 2018 and will focus on the following topic: New concept of Hospitality service.

ECM Benchmarking Report 2018, get your copy!

The Report provides crucial insights into European city competitiveness and competitor sets: bednights sourced from multiple markets in addition to analyses of city tourism compared to national tourism, bed supply, and tourism densities. This 14th edition provides a vital perspective on the volume of urban tourism in Europe, enabling individual city destinations to chart trends and to benchmark themselves in terms of volume and other parameters, especially key source markets.
Challanges for urban destinations.
“Internationals arrivals in Europe were rising in the first 4 month of 2018 by 7 % ... the rest of the world: 6 %. That enforces Europe´s position in tourism.“

Zurab Pololikashvili, Secretary General, WTO
Everything is going to be alright!
## Premier League cities in 2017

<table>
<thead>
<tr>
<th>Rank</th>
<th>Destination</th>
<th>Total Bednights 2017</th>
<th>2016-17 % change</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>*London</td>
<td>79,867,355</td>
<td>4.7%</td>
</tr>
<tr>
<td>2</td>
<td>*Paris</td>
<td>48,110,071</td>
<td>9.3%</td>
</tr>
<tr>
<td>3</td>
<td>Berlin</td>
<td>31,143,424</td>
<td>0.2%</td>
</tr>
<tr>
<td>4</td>
<td>*Rome</td>
<td>29,293,952</td>
<td>2.4%</td>
</tr>
<tr>
<td>5</td>
<td>*Madrid</td>
<td>19,263,602</td>
<td>6.4%</td>
</tr>
<tr>
<td>6</td>
<td>*Barcelona</td>
<td>18,791,180</td>
<td>-1.9%</td>
</tr>
<tr>
<td>7</td>
<td>Prague</td>
<td>18,055,838</td>
<td>7.5%</td>
</tr>
<tr>
<td>8</td>
<td>*Istanbul</td>
<td>17,256,265</td>
<td>12.4%</td>
</tr>
<tr>
<td>9</td>
<td>*Vienna</td>
<td>16,423,533</td>
<td>4.2%</td>
</tr>
<tr>
<td>10</td>
<td>*Amsterdam</td>
<td>15,857,000</td>
<td>13.4%</td>
</tr>
<tr>
<td>11</td>
<td>*Munich</td>
<td>15,663,728</td>
<td>11.7%</td>
</tr>
<tr>
<td>12</td>
<td>Stockholm</td>
<td>14,048,353</td>
<td>4.5%</td>
</tr>
<tr>
<td>13</td>
<td>Hamburg</td>
<td>13,822,337</td>
<td>3.7%</td>
</tr>
<tr>
<td>14</td>
<td>Milan</td>
<td>11,853,191</td>
<td>8.0%</td>
</tr>
<tr>
<td>15</td>
<td>*Lisbon</td>
<td>10,667,695</td>
<td>9.8%</td>
</tr>
</tbody>
</table>

* Cities with an asterisk (*) indicate those cities where teams have home matches.
Premier League Cities in 2017
Second League Cities in 2017
## Top Source Markets

<table>
<thead>
<tr>
<th>Source Market</th>
<th>Bednights 2017</th>
<th>2016-17 % change</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 United States</td>
<td>41,775,519</td>
<td>15.5%</td>
</tr>
<tr>
<td>2 Germany</td>
<td>30,117,902</td>
<td>5.5%</td>
</tr>
<tr>
<td>3 United Kingdom</td>
<td>28,016,190</td>
<td>3.3%</td>
</tr>
<tr>
<td>4 France</td>
<td>20,329,236</td>
<td>3.0%</td>
</tr>
<tr>
<td>5 Spain</td>
<td>15,875,769</td>
<td>2.1%</td>
</tr>
<tr>
<td>6 Italy</td>
<td>15,758,546</td>
<td>-1.8%</td>
</tr>
<tr>
<td>7 China</td>
<td>9,754,610</td>
<td>16.5%</td>
</tr>
<tr>
<td>8 Russia</td>
<td>8,666,689</td>
<td>26.7%</td>
</tr>
<tr>
<td>9 Japan</td>
<td>6,482,335</td>
<td>7.4%</td>
</tr>
</tbody>
</table>
European Cities & Nations

**EU 28 Nations**
International Source Markets' Relative Size 2017

- Germany: 31%
- United Kingdom: 17%
- France: 8%
- Other: 21%
- Russia: 3%
- China: 2%
- United States: 8%
- Spain: 4%
- Italy: 5%
- Japan: 1%

**ECM Report Cities**
International Source Markets' Relative Size 2017

- United Kingdom: 8%
- France: 5%
- Germany: 8%
- Italy: 4%
- Japan: 2%
- Spain: 2%
- United States: 11%
- Russia: 2%
- China: 3%
- Other: 53%
Total Bednights
Cities & Nations

EU-28 (Nations) + 8.8%
ECM-Cities + 14.2%
International Bednights
Cities & Nations

EU-28 (Nations) + 13,7 %
ECM-Cities + 19,2 %
The main hubs (cities) are the gateway to

• “second city-destinations”
• to rural destinations!

1. arrival
2. dispersal
Everything is going to be alright?
MI NO VADO VIA MI RESTO

SO VENEXIAN
NO SO IN VENDITA
VOI VIVERE QUI

© Reuters/Albert Silvestri
overtourism?
overtourism?

„unbalanced tourism“
<table>
<thead>
<tr>
<th>Item</th>
<th>Quantity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plates</td>
<td>12</td>
</tr>
<tr>
<td>Forks</td>
<td>3</td>
</tr>
<tr>
<td>Spoons</td>
<td>7</td>
</tr>
<tr>
<td>Knives</td>
<td>7</td>
</tr>
<tr>
<td>Glasses</td>
<td>8</td>
</tr>
<tr>
<td>Chairs</td>
<td>12</td>
</tr>
<tr>
<td>Parking</td>
<td>4</td>
</tr>
</tbody>
</table>
Toolbox to manage growth.
Unbalanced tourism is NOT an urban problem only!
What makes/made city breaks so successful?
Accessibility

- By air
- By train
- By ship
- By road
- ...

© aena.es
Travelling from city to city

• By air
  • Dramatic increase (Low-Cost-Carrier)

• By train
  • High speed train as new alternative

• By road
  • INTERCITY-BUS
    Flixbus (based in Germany) with
    2,000 destinations
    in 29 countries;
    40 Mio. passengers per year
By road?

• Number of people with driver’s licenses is decreasing!

A University of Michigan study has found that the percentage of young people with drivers licenses continues a steady decline, while the number of elderly drivers remains consistently high.

• Reduction within young drivers in Japan, Germany, US; fast decline in cities.

• Consequence: even more travel to cities!
Public transport
• Investments in a **city** are investment for
  • visitors
  AND
  • residents
• Population in Cities is growing
  • Therefore the potential source-markets are growing too.
  • Cities are potential destinations AND source-markets.
Successful concepts for city breaks
Gastronomy
Ghent, Belgium

• Since 2009 Thursday = Veggie Day
• The vegetarian Capital of the world!
  • From a meat-loving place to a carbon-neutral City
Ljubljana, Slovenia

• Taste Ljubljana
  • traditional dishes with local flavors using modern cooking methods
  • tours & events
  • open Kitchen (see photo) each Friday at the market

This matches perfectly with the green and sustainable agenda of the City (European Green Capital in 2016).
Graz, Austria

• Since 2008 „Austria´s Capital of Culinary Delights
  • Focus on regional and seasonal products
  • Wining & Dining
  • Creation of Products (Culinary Walking Tours etc. and events)
„We want less“
„We want it different“
Enough is enough ...
Copenhagen, Denmark

• „The end of tourism as we know it“ followed by „localhood for everyone.
  • The destination’s future will be co-created by residents, industry and visitors.
    • BALANCE between visitors and residents.
    • Think visitors as temporary residents.
„Telling the truth?“
„If you turn around there would be people queuing ...“
Amsterdam, Netherlands

Welcome to Amsterdam

- Your guide to visit, enjoy, live, work & invest in Amsterdam
Amsterdam steps up effort to curb misconduct

AMSTERDAM, FROM PAGE 1
show that walking 50 yards or so took at least 15 minutes of pushing and shuffling. A couple with a stroller gave up after a few minutes.

Last year, 20 million tourists visited Amsterdam. During the busiest times on weekends, as many as 50,000 visitors can pass through that alley—or attempt to—every hour, according to city estimates.

Residents have complained that there are not enough police officers to guarantee everyone’s safety, and that De Wallen is now so overcrowded that ambulances have a difficult time reaching the injured or ill. Arre Zuurmond, the city’s ombudsman, described the scene as a lawless urban jungle, in an interview with the newspaper Trouw published in July. The prostitutes complain that the throngs of tourists deter paying customers.

Pen van Burk, 33, a corporate headhunter who lives above one of the brothels in the area, said that the noise did not bother him but that the crowds could make it difficult to get home. He said he had tried to solve the problem by installing a second bell on his bike. “That way, people think it’s more than one bike behind them,” he explained.

Visitors are reminded that drinking and singing loudly are legal in bars but will incur hefty fines if done in the street.

The city has taken aim at the red-light district before, notably with a decades-long urban development plan, called 1012, after the area’s postal code. The gentrification project, which concluded this year, included closing more than 100 brothels and dozens of coffee shops (where cannabis can be bought), and trying to bring different kinds of businesses to the area.

Critics say that the 1012 plan has had unwanted side effects. By shrinking the red-light district, Amsterdam has lost millions of euros in taxes.
Dubrovnik, Croatia

- City for ALL seasons
  - Limited number of cruise-ship-passengers
    - 4000 morning
    - 4000 afternoon
  - „Respect-the-City-Project“
  - Events in the off-season!
Dubrovnik, Croatia

• City for ALL seasons
  • Limited number of cruise-ship-passengers
    • 4000 morning
    • 4000 afternoon
  • „Respect-the-City-Project“
  • Events in the off-season!
promotional campaigns

„We want more“
Vienna, Austria

• Still on the growth-path!
• Still doing campaigns, many times accompanied by activities and actions in public space.
• Still working actively on access and connectivity (flight-connections).
Oslo, Norway

• **OSLO-toolbox**
  • No logos
  • No slogans
  • An invitation to use
    • Pictures
    • Videos
    • Stories/arguments for Oslo

*Everyone in the city sells the city!*
Hamburg, Germany

• New infrastructure
  • Elbphilharmonie

• Regional aspects
  • Use the offers in the region around Hamburg

• Biking
  • Get on the bike!

• City-Coast!
  • Use the coastline
Graz, Austria

• Focus on Influencer-campaigns

• 2017:
  • #coolneighbours in cooperation with Ljubljana

• 2018:
  • #EuropeanCultureTrip und #EuroFoodTrip in cooperation with Emilia-Romagna & Costa Brava
In general: Strengthening of the DNA

- **Heidelberg**, GER – Investment in Congress Center
- **Salzburg**, A – believing in Mozart, Sound of Music
- **The Hague**, NL – using the reputation of a City of Justice; business & meetings
- **Milano**, I – emphasising shopping; business & meetings
- **Lyon**, F – focusing on cuisine
- **Belfast**, UK – using the Titanic; using the recent history, focusing on seasons
- **Linz**, A – „Gamification“ as part of City-Experience (quiz, treasure-hunt, etc.); business
- **Reykjavik**, ISL – perfect use of Low-Cost-Carriers BUT aware of limits!
- **Pamplona**, Davos, Kassel … use events to get worldwide attention
FOMO
Fear Of Missing Out

• The Eiffel-Tower, the Leaning Tower, the monuments, the mountains, the lakes .... are always there.

• But
  • the current exhibition ...
  • the concert tomorrow evening ...
  • the festival next week ...
  • the main dish of this season ...

To be appealing is not good enough. There must be the desire to visit NOW!
We (DMOs) need to redefine our role.
The ECM-Manifest

As an organisation dedicated to improving the performance and competitiveness of Europe’s leading cities, we want to put our vision of the future of DMOs into words.
Technologie
Gartner-Hype-Cycle for Technology

- Peak of Inflated Expectations
- Plateau of Productivity
- Slope of Enlightenment
- Trough of Disillusionment
- Technology Trigger
The future is mobile

- Bookings
- Public transport
- Reservations
- Tickets
- Phone
- Tools for payment
- .....
EVERY MINUTE OF THE DAY

- Pinterest users pin 3,472 images.
- Vine users share 8,333 videos.
- YouTube users upload 72 hours of new video.
- Email users send 204,000,000 messages.
- Google receives over 4,000,000 search queries.
- Facebook users share 2,460,000 pieces of content.
- Tinder users swipe 416,667 times.
- Yelp users post 26,380 reviews.
- Skype users connect for 23,300 hours.
- Apple users download 48,000 apps.
- Pandora users listen to 61,141 hours of music.
- Amazon makes $83,000.
- Instagram users post 216,000 photos.
- Twitter users tweet 277,000 times.

Sources:
BIT.BLOGS.NYTIMES.COM, INTEL.COM, APPLE.COM, TIME.COM, DAILYMAIL.CO.UK, SKYPE.COM, STATISTICBRAIN.COM
Trends

• From **Marketing** to **Management**
• From **Destination** Marketing to **Place** Marketing
• From **Quantity** to **Quality**
• From **USP** to **DNA**
# of visitors, if we keep growing …

… 2.6 billion international visitors by 2028.
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Thank you very much!