

Austria

Tourism in the economy

According to the latest results of the Austrian Tourism Satellite Account (TSA), the direct value-added effects of tourism in 2016 totalled EUR 19.7 billion (without business trips) or 5.6% of GDP. Based on the TSA, about 293 100 full-time job equivalents could be directly attributed to tourism related industries in 2015, contributing 7.9% of overall employment in Austria.

In 2016, the number of international tourist arrivals in all accommodation establishments (commercial and private) was 28.1 million (up 5.2% over 2015) and the number of bednights amounted to 102.9 million. The fastest-growing source markets compared with 2015 were Asian countries such as India (up 24.6% arrivals) and South East Asian countries (up 18.9%). Arrivals from the Middle East declined. Germany, the most important market for Austria, increased by 7.0% to 13.0 million arrivals; the Netherlands and Switzerland – the second and third most important markets – showed increases of 7.4% and 3.3% respectively.

In 2016, international receipts exceeded international expenditure by approximately EUR 8.8 billion, up EUR 632 million from 2015. In total, the income from inbound travel was EUR 17.4 billion i.e. up EUR 1 billion compared to 2015.

In 2016, domestic tourist arrivals in paid accommodation totalled 13.3 million (up 5.1%) with 38 million bednights registered (up 4.4%). Record highs were registered during both the winter (November 2016 to April 2017) and summer seasons (May to October 2016), with 5.6 million and 7.8 million arrivals respectively.

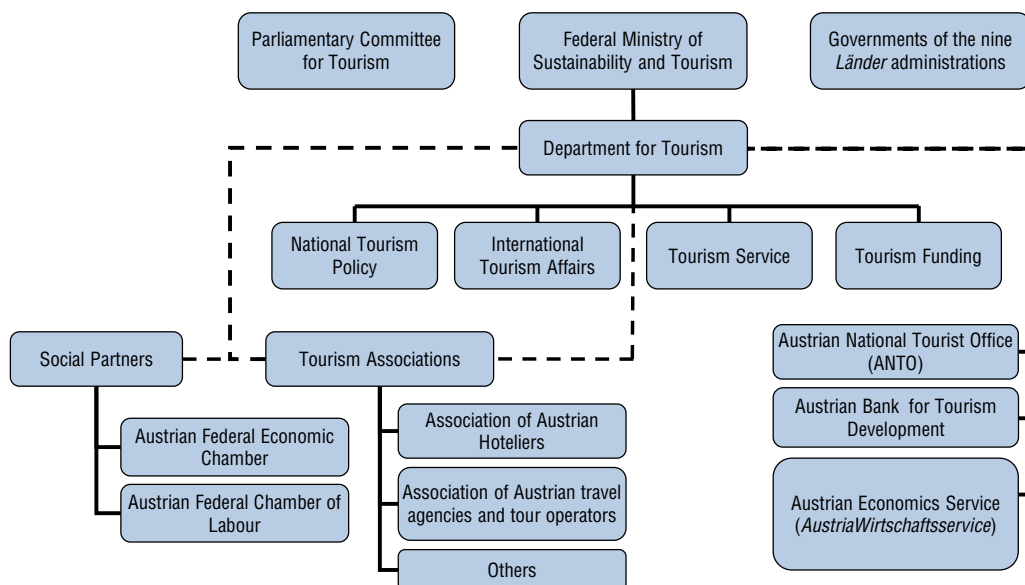
Tourism governance and funding

According to the Austrian Federal Constitution, the nine *Länder* (federal states) have legislative and executive responsibility for tourism affairs. However, as tourism is a cross-cutting sector, both federal and European laws apply.

At the national level, from January 2018 on, tourism policy is the responsibility of the Federal Ministry of Sustainability and Tourism. The new government programme in particular focuses on better framework conditions and business environment and on the positioning of Austria as a competitive tourism destination. This includes the reduction of financial and administrative burden for the small structured tourism industry, measures against the shortage of qualified labour, and the development and implementation of an overall national tourism strategy. This strategic approach will also include other important issues such as the strengthening of the national brand, the internationalisation of markets, financing of enterprises/SMEs, digitalisation, innovation and year-round tourism. Synergies between the national and regional level continue to be strengthened in particular with regard to tourism promotion.

The Austrian National Tourist Office (ANTO) is the country's national tourism marketing organisation. It is funded by the Ministry (75%) and the Austrian Federal Economic Chamber (25%). ANTO co-operates closely with the Austrian tourism trade e.g. tourist boards of the *Länder* and tourism businesses. The core responsibilities of ANTO are market research, brand management, marketing, tourism networking, and information provision.

Austria: Organisational chart of the tourism bodies



Source: OECD, adapted from the Federal Ministry of Sustainability and Tourism, 2018.

In 2016, the national tourism administration dispensed a budget of about EUR 52 million. Of this total, EUR 22.2 million were dedicated to the financial support of SMEs and administered by the Austrian Bank for Tourism Development. EUR 24.1 million were directed to the annual budget of ANTO and EUR 5.5 million were disbursed by the Ministry in the form of individual subsidies for co-financing tourism projects and service contracts. Also, EUR 77.8 million in European Recovery Programme funds were made available for loans to SMEs in the tourism industry. In addition to the national budget, all nine *Länder* have their own tourism budgets to support their specific tourism development programmes.

Tourism policies and programmes

Key issues and challenges for Austria include the need to: Diversify core markets; co-ordinate marketing efforts; encourage investment and innovation; combat seasonality; improve accessibility and connectivity; address employment and labour market issues; coordinate the administrative and regulatory environment; and consider sustainable development and digital transformation.

Strategic initiatives at the national level seek to address these issues:

- Marketing. ANTO and the nine tourism marketing organisations of the *Länder* are seeking to work more efficiently in terms of branding, marketing, IT, research and communication.
- Investment, quality and innovation. There is continued support for the Austrian Bank for Tourism Development which handles SME funding programmes including the provision of favourable loans and encouraging quality, innovation and new business start-ups. For

example, the *Innovationsmillion* subsidy supports innovative flagship tourism projects based on stakeholder co-operation at the destination level and for which the Ministry, together with the European Union, provides EUR 1 million per year. The bi-annual award, *Österreichischer Innovationspreis Tourismus*, is awarded in co-operation with the *Länder* to innovative best practices with a specific focus e.g. tourism and water, tourism and mobility with financial support for the winner. Additionally, the Ministry launched several initiatives in 2016 and 2017 to encourage tourism businesses to invest, including in rural areas. In the frameworks of various investment growth bonus programs, subsidies will be dedicated to tourism investment projects.

- **Employment, education and training.** Employment is an issue of high importance. Education and training have been identified as crucial for the success of Austrian tourism. The Ministry together with its partners has launched a number of initiatives to increase the attractiveness of jobs in tourism and to satisfy the high demand for skilled employees. These initiatives include career guidance at schools (for teachers, pupils and parents) a variety of offers to support apprenticeship training (trainees and trainers/enterprises) in relevant applications, as well as competitions for trainees and awards to recognise enterprises for their achievements in employee development etc.
- **Connectivity and transport.** In order to deal with the challenges that the tourism sector is facing in terms of mobility e.g. more short term trips and capacity restrictions, particularly in sensitive areas such as the Alps, the Ministries responsible for tourism, the environment and transport have taken various initiatives including conferences and workshops and produced publications for stakeholders. The annual networking conference, *Tourism Mobility Day*, which was organized for the first time in 2014 went international in 2017. It reviewed the needs and challenges of tourism mobility and the importance of cooperation between tourism, transport and environment agencies with a view to creating mobility solutions to and within tourism destinations that are customer friendly, simple, affordable and sustainable. In May 2016 a destination manual for sustainable mobility was published.
- **Accessibility.** The Ministry supports the tourism industry with appropriate information e.g. a handbook to inform tourism enterprises about the legal framework and relevant construction standards, brochures on how to create natural and cultural offers, customer care and other relevant technical information.
- **Climate change.** The Ministry has undertaken various initiatives e.g. promotion of sustainable, year-round quality-tourism, associated research, knowledge transfer and awareness-raising on climate change and promotion of energy efficiency and sustainable mobility in tourism.
- **Tourism and the SDGs.** In January 2017, the start of the International Year of Sustainable Tourism for Development, the Ministry launched online information on how Austrian tourism can help to achieve the SDGs. It includes comprehensive information on the 17 goals, with practical examples and expert statements, and was supported by a number of related events.
- **Crowdfunding.** The Alternative Financing Act came into effect in September 2015. It laid the foundation for alternative forms of financing, including crowdfunding, supporting the interaction of different financing components within one overall funding concept. Consequently, in September 2016, the crowdfunding platform “we4tourism” was

established in order to further broaden options for tourism businesses to access financing.

- Digitalisation. The Ministry together with the Austrian NTO and the Federal Economic Chamber has launched a digitalisation strategy for Austrian tourism in September 2017 (Box 1.13).

Statistical profile

Table 1. **Austria: Domestic, inbound and outbound tourism**

	2012	2013	2014	2015	2016
TOURISM FLOWS, THOUSAND					
Domestic tourism					
Total domestic trips	..	..	..	..	..
Overnight visitors (tourists)	12 013	12 034	12 265	12 697	13 343
Same-day visitors (excursionists)	..	..	..	..	..
Nights in all types of accommodation	35 964	35 755	35 668	36 425	38 014
Hotels and similar establishments	23 762	23 635	23 482	23 941	24 841
Specialised establishments	..	..	..	..	..
Other collective establishments	8 621	8 619	8 860	9 122	9 718
Private accommodation	3 582	3 501	3 326	3 362	3 455
Inbound tourism					
Total international arrivals	..	..	..	..	..
Overnight visitors (tourists)	24 151	24 813	25 291	26 728	28 121
Same-day visitors (excursionists)	..	..	..	..	..
Top markets					
Germany	11 412	11 758	11 750	12 141	12 986
Netherlands	1 715	1 674	1 672	1 735	1 863
Switzerland and Liechtenstein	1 276	1 282	1 310	1 400	1 446
Italy	1 060	1 024	1 051	1 123	1 102
United Kingdom	741	774	803	876	920
Nights in all types of accommodation	95 052	96 874	96 233	98 824	102 863
Hotels and similar establishments	61 360	62 137	61 830	63 355	65 244
Specialised establishments	..	..	..	..	..
Other collective establishments	15 799	16 296	16 269	16 981	18 155
Private accommodation	17 893	18 441	18 134	18 489	19 465
Outbound tourism					
Total international departures	..	..	..	..	..
Overnight visitors (tourists)	10 960	10 671	10 994	10 628	11 534
Same-day visitors (excursionists)	..	..	..	..	..
Top destinations					
Germany	2 369	2 330	2 347	2 297	2 324
Italy	2 083	1 932	2 033	1 971	2 178
Croatia	1 125	985	1 085	965	1 416
Spain	571	487	569	586	628
Greece	263	387	380	352	369
TOURISM RECEIPTS AND EXPENDITURE, MILLION EUR					
Inbound tourism					
Total international receipts	16 661	17 127	17 447	18 353	18 984 p
International travel receipts	14 706	15 237	15 676	16 421	17 436 p
International passenger transport receipts	1 955	1 890	1 771	1 932	1 548
Outbound tourism					
Total international expenditure	9 660	9 620	10 028	10 017	10 309 p
International travel expenditure	7 821	7 737	8 149	8 205	8 588 p
International passenger transport expenditure	1 839	1 883	1 879	1 812	1 721

.. Not available; p Provisional data

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888933639588>

Table 2. Austria: Enterprises and employment in tourism

	Number of establishments ¹	Number of persons employed				
		2012	2013	2014	2015	2016
Total	..	..	..	..	..	..
Tourism industries	78 590	262 036	270 486	..	293 099	..
Accommodation services for visitors	..	..	..	..	..	..
Hotels and similar establishments	16 296	61 683	63 753	..	66 087	..
Food and beverage serving industry	31 180	95 260	99 142	..	106 502	..
Passenger transport	12 479	52 613	53 261	..	53 832	..
Air passenger transport	176	3 820	4 524	..	4 888	..
Railways passenger transport	28	6 703	6 590	..	5 928	..
Road passenger transport	12 176	42 054	42 113	..	42 967	..
Water passenger transport	99	36	34	..	49	..
Passenger transport supporting services	..	757	752	..	..	..
Transport equipment rental	2 544	..	..	..	267	..
Travel agencies and other reservation services industry	2 466	31 613	32 843	..	43 419	..
Cultural industry	9 352	12 790	13 397	..	14 472	..
Sports and recreation industry	4 273	7 319	7 338	..	8 520	..
Retail trade of country-specific tourism characteristic goods	..	..	..	..	..	..
Other country-specific tourism industries	..	..	..	..	..	..
Other industries	..	..	..	..	..	..

.. Not available

1. Data refer to number of enterprises.

Source: OECD Tourism Statistics (Database).


StatLink  <http://dx.doi.org/10.1787/888933639607>

Table 3. Austria: Internal tourism consumption

Million EUR

	2015		
	Domestic tourism expenditure	Inbound tourism expenditure	Internal tourism consumption
Total	15 158	18 310	34 685
Consumption products	15 118	17 965	34 301
Tourism characteristic products	12 418	15 719	28 138
Accommodation services for visitors	2 818	6 977	9 795
Food and beverage serving services	4 551	5 098	9 649
Passenger transport services	3 460	1 901	5 361
Air passenger transport services	2 076	1 585	3 661
Railways passenger transport services	775	294	1 069
Road passenger transport services	580	14	594
Water passenger transport services	28	9	37
Passenger transport supporting services	..	..	..
Transport equipment rental services	230	5	235
Travel agencies and other reservation services industry	9	0	9
Cultural services	978	707	1 685
Sports and recreation services	372	1 032	1 403
Country-specific tourism characteristic goods	..	..	..
Country-specific tourism characteristic services	..	..	..
Other consumption products	2 700	2 246	6 163
Tourism connected products	..	..	..
Non-tourism related consumption products	..	..	..
Non-consumption products	40	344	384

.. Not available

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888933639626>



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