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Austria

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Austria

Tourism in the economy

In 2012, the number of international tourist arrivals in hotels and similar establishments in Austria (including commercial holiday dwellings) was 18.9 million (+4.8% over 2011). The fastest-growing source markets, compared with 2011, were the Russian Federation, with some 476 400 arrivals (up 19.0% over the previous year) and 1.8 million overnights (+18.9%); China, with 354 700 arrivals (+36.4%) and 506 600 nights (+37.0%); and Saudi Arabia, with 64 300 arrivals (+67%) and 218 300 nights (+69.2%).

Domestic tourist arrivals in paid accommodation totalled 12.0 million (+3.4%) in 2012, and a record 36.0 million bednights were registered. Record highs with regard to arrivals were also recorded during both the winter months (November 2011 to April 2012) and summer season (May to October 2012) – of 16.4 million (+4.9%) and 19.4 million (+3.6%), respectively.

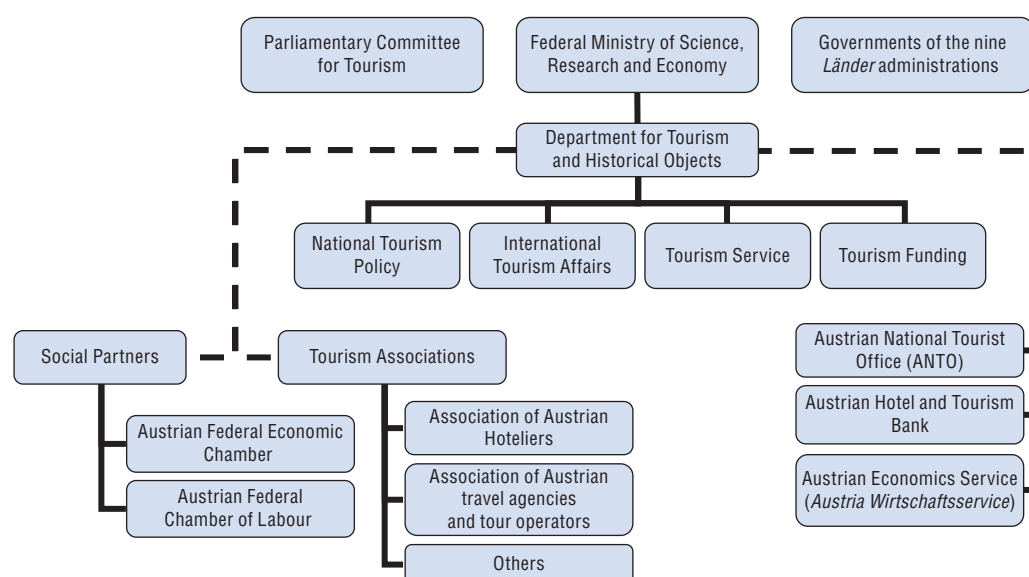
In 2012, 64 500 accommodation establishments (excluding campsites) and 1.09 million beds (excluding extra beds) were listed in Austria. While this represented a fall in the number of accommodation establishments of 1.1% over 2011's level, the number of beds in four- and five-star category establishments increased by 2.8%.

According to the national Tourism Satellite Account (TSA), the direct value-added effects of tourism in 2012 totalled EUR 17.9 billion, or 5.8% of GDP. About 326 300 jobs (262 000 full-time equivalents) could be directly attributed to tourism-characteristic industries in 2012, contributing 7.5% and 7.3%, respectively, to overall employment in Austria.

Tourism organisation and governance

According to the Austrian Federal Constitution, the nine *Länder* have the legislative and executive competencies for tourism affairs. Nevertheless, as tourism is a typical cross-cutting sector, both federal and European laws apply. In 2006, the Austrian Parliament established the Parliamentary Committee for Tourism. At the national level, tourism policy is the responsibility of the Federal Ministry of Science, Research and Economy ("the ministry"). In 2010, the minister launched a tourism strategy with the objective of close and strategic co-ordination in tourism issues. The strategy also strengthens co-ordination between the national and the regional levels, i.e. with and between the *Länder* (Figure 1).

The Austrian National Tourist Office (ANTO, or Österreich Werbung) is the country's national tourism marketing organisation. It is funded by the ministry (75%) and the Austrian Federal Economic Chamber (25%). ANTO also receives funding from the Austrian tourism trade's partnership contributions for marketing services (e.g. tourism boards of the *Länder*, destinations and tourism businesses). Its core competencies are market research, brand management, innovative marketing – both domestic and international – and

Figure 1. **Austria: Organisational chart of tourism bodies**

Source: OECD, adapted from the Austrian Federal Ministry of Science, Research and Economy, 2014.

tourism networking and information brokering (expert knowledge on trends, markets and product development). In its international strategy, it focuses on increasing Austria's market share in the most promising international markets.

Tourism budgets

In 2012, the national tourism administration dispensed a budget of EUR 59.4 million. Of this total, EUR 27.5 million were dedicated to the financial support of small and medium-sized enterprises (SMEs), administered by the Austrian Bank for Tourism Development and subject to regular evaluation based on a range of key indicators. EUR 24.3 million were contributed to the annual budget of ANTO, and EUR 7.6 million were disbursed by the ministry in the form of individual subsidies for co-financing tourism projects. In addition, EUR 50.0 million in the European Recovery Programme (ERP) funds were made available for loans to SMEs in the tourism industry.

Apart from the national budget, all nine *Länder* have their own tourism budgets in order to support their specific tourism development programmes.

Tourism-related policies and programmes

In 2010, the Federal Minister of Economy, Family and Youth launched a tourism strategy in close collaboration with the nine *Länder* and all relevant tourism stakeholders. A key element of the strategy is the focus on Austria's unique selling propositions (USPs): the Alps, the Danube its lakes, cities and culture.

The tourism strategy is reviewed and adapted to international and national developments on an annual basis by a high-level Tourism Conference. This conference is prepared by a steering committee comprising high-ranking representatives from the ministry and the nine *Länder*. In addition, an independent expert advisory group reports to the conference on trends and current challenges, and gives recommendations for future action. The minister and tourism politicians of the *Länder* agree an action plan for the following year.

The National Tourism Strategy identifies five key issues: marketing, innovation (Box 1), subsidies, infrastructure and business environment. Examples of measures in these areas are:

- **Marketing:** Closer co-operation between ANTO, the nine tourism-marketing organisations of the *Länder* and the destinations themselves streamlines activities and enhances efficiency. Marketing measures emphasise Austria's USPs – in 2013, for example, there has been a special focus on culture (architecture and identity) in the worldwide marketing of ANTO; in 2012, there was a focus on water (rivers, lakes) in the domestic market; and an annual ANTO Tourism Day was established and organised back to back with the annual Tourism Conference in 2012 and 2013, bringing together all stakeholders to discuss tourism branding and marketing issues.
- **Subsidies:** The ministry continues its strong public-private partnership with the Austrian Bank for Tourism Development, which handles SME funding programmes. The main objectives of these programmes are to encourage investments, to improve the quality and size of tourism enterprises, to enhance co-operation, to optimise the financial structure of SMEs, and to encourage new business start-ups. Since 2009, there has been a stronger focus on Austria's USPs and on sustainability-related topics, such as bicycle tourism and energy efficiency, as well as on the better use of new information and communication technologies by SMEs and family-friendly enterprises. The newly installed *Förderpyramide* – a co-ordination instrument for funding at national and *Länder* levels – defines competences more effectively, reflects the importance and size of projects, and helps to increase transparency for SMEs.
- **Infrastructure:** The focus is on a number of different areas – the development of infrastructure for summer and year-round tourism; co-operation among regions and municipalities with regard to infrastructure development and financing; the further development of alpine infrastructure (the Austrian government has been supporting the sustainable renovation and modification of alpine huts for many years – also to minimise energy consumption and to contribute to the climate balance); increasing

Box 1. Austrian initiative supporting innovation in tourism

Innovation is of great importance for Austrian tourism, and it is also taken into account in the Austrian Tourism Strategy. There has been a strong focus on innovation since 2012. Among the different measures are: a bi-annual award organised in co-operation with the *Länder*, dedicated to innovative best practices, and with financial project support for the winner; product innovation workshops organised by ANTO; and increased subsidies for innovation.

One such subsidy is the *Innovationsmillion*, which supports innovative flagship tourism projects based on stakeholder co-operation at the destination level, and for which the ministry, together with the *Länder*, provide EUR 1 million a year. In 2012, seven such projects were awarded, on topics ranging from product development to distribution and communication.

The guidelines for tourism funding programmes expire at the end of 2013, so a comprehensive evaluation has been carried out during 2013 in order to design new guidelines for the tourism funding programmes at the national level. A special focus will be placed on innovation and young entrepreneurship. The objective is to make them more effective in meeting future needs.

mobility via public transport to, from and within tourism regions; initiatives and projects related to “Tourism for All” (in particular barrier-free tourism, such as special subsidies for consulting, the publication of brochures and organisation of events and awards); and initiatives in the bicycle tourism segment (e.g. signage, development of quality criteria and information).

- *Business environment:* The priority objective is to ensure a competitive business environment by keeping the administrative burden low, especially for SMEs. The ministry attaches great importance to the favourable development of the tourism labour market and to continuously improving the image, the competitiveness and the work-life balance of jobs in tourism (e.g. by supporting information brochures in several languages, image campaigns, events, etc.). In order to inform tourism industry stakeholders and to discuss developments and trends, the ministry supports studies and organises/participates in expert events and roundtables. Recent topics include quality, the implications of climate change and possible adaptation strategies, tourism ethics and corporate social responsibility, cultural routes, travel facilitation, mobility, etc.

Statistics and economic evaluation

Statistics and studies on the economic development of tourism, trends in tourism and specific topics (e.g. in 2012/13 the topics of quality, lake tourism, climate change, mobility, tourism and migration, and the attitude of Austrians towards tourism) are regularly made available to the tourism industry as a basis for strategic decision-making.

The TSA is produced annually since 2001, providing economic analysis of the tourism sector, supplemented by data on the impacts of employment, and including a regional breakdown for three *Länder* (Vienna, Upper Austria and Lower Austria).

Since 2004, T-MONA (Tourism Monitor Austria), a web-based management information system, has been gathering travel behaviour and socio-demographic data, and providing an up-to-date picture of domestic and foreign tourists in Austria at local destination, *Länder* and national levels.

TourMIS (the Tourism Marketing-Information-System), established in 2000, provides information and decision support for the tourism industry and scholars. It contains online tourism survey data, as well as various tools to transform data into valuable management information. TourMIS is open to all authorised tourism organisations, societies, tourism consultants, companies, tourism training centres, pressure groups, etc. in Austria and abroad. TourMIS is financially supported by ANTO, European Cities Marketing (ECM) and the European Travel Commission (ETC).

Statistical profile

Table 1. **Austria: Domestic tourism**

	Unit	2008	2009	2010	2011	2012
Total domestic trips		..	..	..	..	..
Overnight visitors (tourists) ¹	Thousand	10 681	10 961	11 385	11 617	12 013
Same-day visitors (excursionists)		..	..	..	..	..
<i>Trips by main purpose of visit</i>						
Business and professional		..	..	..	..	..
Holiday, leisure and recreation		..	..	..	..	..
Nights in all means of accommodation	Thousand	33 879	34 443	35 024	35 297	35 964
Hotels and similar establishments		..	..	..	..	..
Other collective establishments		..	..	..	..	..
Domestic travel receipts		..	..	..	..	..

1. Commercial accommodation.

Source: Statistics Austria.

StatLink  <http://dx.doi.org/10.1787/888932985884>

Table 2. **Austria: Inbound tourism**

	Unit	2008	2009	2010	2011	2012
Total international arrivals		..	..	..	..	..
Overnight visitors (tourists) ¹	Thousand	17 047	16 510	17 177	18 045	18 907
Same-day visitors (excursionists)		..	..	..	..	..
<i>Top markets</i>						
Germany	Thousand	7 820	7 750	7 887	8 054	8 380
Switzerland and Liechtenstein	Thousand	853	885	941	1 076	1 141
Netherlands	Thousand	1 082	1 072	1 044	1 069	1 124
Italy	Thousand	901	918	930	944	907
United Kingdom	Thousand	726	614	641	619	642
Nights in all means of accommodation		..	..	..	..	..
Hotels and similar establishments		..	..	..	..	..
Other collective establishments		..	..	..	..	..
Total international receipts	Million EUR	16 513	15 374	15 705	16 187	16 661
International travel receipts	Million EUR	14 677	13 895	14 027	14 267	14 706
International passenger transport receipts	Million EUR	1 836	1 479	1 678	1 920	1 955

1. Hotels and similar establishments, including holiday dwellings.

Source: Statistics Austria.


StatLink  <http://dx.doi.org/10.1787/888932985903>

Table 3. **Austria: Outbound tourism**

	Unit	2008	2009	2010	2011	2012
Total international departures		..	..	..	..	..
Overnight visitors (tourists)	Thousand	9 677	10 121	9 882	9 874	10 960
Same-day visitors (excursionists)		..	..	..	..	..
Total international expenditure	Million EUR	9 457	9 143	9 292	9 232	9 664
International travel expenditure	Million EUR	7 721	7 744	7 718	7 531	7 825
International passenger transport expenditure	Million EUR	1 736	1 399	1 574	1 701	1 839

Source: Statistics Austria.


StatLink  <http://dx.doi.org/10.1787/888932985922>

Table 4. Austria: Enterprises in tourism
Thousand enterprises

	2008	2009	2010	2011	2012
Total tourism enterprises	75.73	74.43	72.79	73.69	73.20
Tourism industries	..	..	..	..	..
Accommodation services for visitors	..	..	..	..	..
Hotels and similar establishments	14.49	14.80	14.86	14.93	14.88
Food and beverage serving industry ¹	31.90	30.13	29.23	29.24	29.11
Passenger transport	..	..	..	..	..
Air passenger transport	0.15	0.16	0.16	0.19	0.19
Railways passenger transport	0.03	0.02	0.02	0.02	0.03
Road passenger transport	12.38	12.17	11.81	11.92	12.02
Water passenger transport	0.09	0.07	0.08	0.08	0.08
Passenger transport supporting services	0.46	0.49	0.49	0.49	0.50
Transport equipment rental	..	..	..	..	..
Travel agencies and other reservation services industry ²	2.38	2.35	2.35	2.39	2.37
Cultural industry ³	9.35	9.73	9.42	9.90	9.74
Sports and recreation industry	4.50	4.51	4.37	4.53	4.28
Retail trade of country-specific tourism characteristic goods	..	..	..	..	..
Other country-specific tourism industries	..	..	..	..	..
Other industries	..	..	..	..	..

1. Includes restaurants and similar establishments.

2. Travel agencies.

3. Includes entertainment activities.

Source: Statistics Austria, Tourism Satellite Account.

StatLink  <http://dx.doi.org/10.1787/888932985941>

Table 5. Austria: Employment in tourism
Number of jobs

	2008	2009	2010	2011	2012
Total tourism employment (direct)	299 190	298 470	312 050	314 580	326 300
Tourism industries	..	..	..	..	..
Accommodation services for visitors	..	..	..	..	..
Hotels and similar establishments	78 800	73 430	74 960	75 660	80 130
Food and beverage serving industry	110 340	104 740	110 710	113 700	123 040
Passenger transport	..	..	..	..	..
Air passenger transport	6 290	6 150	6 130	5 930	5 070
Railways passenger transport	7 450	8 590	8 310	8 130	7 900
Road passenger transport	36 890	44 590	44 830	45 930	46 220
Water passenger transport	40	50	50	50	40
Passenger transport supporting services	1 030	1 350	730	710	810
Transport equipment rental	..	..	..	..	..
Travel agencies and other reservation services industry ¹	34 630	33 930	34 440	35 290	35 850
Cultural industry ²	15 350	16 560	20 310	18 600	17 330
Sports and recreation industry	8 360	9 090	11 590	10 580	9 910
Retail trade of country-specific tourism characteristic goods	..	..	..	..	..
Other country-specific tourism industries	..	..	..	..	..
Other industries	..	..	..	..	..
<i>Gender breakdown</i>					
Male (% of total tourism employment)	49	50	50	50	50
Female (% of total tourism employment)	51	50	50	50	50

1. Travel agencies.

2. Includes entertainment activities.

Source: Statistics Austria, Tourism Satellite Account.

StatLink  <http://dx.doi.org/10.1787/888932985960>

Table 6. Austria: Internal tourism consumption
Million EUR, 2012

	Domestic tourism consumption	Inbound tourism consumption	Internal tourism consumption
Total	14 984	16 659	31 643
Consumption products	..	..	..
Tourism characteristic products	..	..	..
Accommodation services for visitors	2 815	6 777	9 592
Food and beverage serving services	3 882	4 744	8 626
Passenger transport services	2 995	1 953	4 948
Air passenger transport services	..	..	..
Railways passenger transport services	..	..	..
Road passenger transport services	..	..	..
Water passenger transport services	..	..	..
Passenger transport supporting services	..	..	..
Transport equipment rental services	..	..	..
Travel agencies and other reservation services	9	..	9
Cultural services ¹	1 478	1 333	2 811
Sports and recreation services	..	..	..
Country-specific tourism characteristic goods	..	..	..
Country-specific tourism characteristic services	..	..	..
Other consumption products ²	3 805	1 852	5 657
Tourism connected products	..	..	..
Non-tourism related consumption products	..	..	..
Non-consumption products	..	..	..

1. Includes recreation and other entertainment services.

2. Tourism-connected and non-specific products and services, including distribution margin.

Source: Statistics Austria, Tourism Satellite Account.


StatLink  <http://dx.doi.org/10.1787/888932985979>

Table 7. Austria: Key economic indicators
Percentage

	2008	2009	2010	2011	2012
Tourism GDP (direct) as % of total GDP	5.3	5.4	5.5	5.5	5.8
Total tourism employment (direct) as % of total employment	7.1	7.1	7.4	7.3	7.5

Source: Statistics Austria, Tourism Satellite Account.

StatLink  <http://dx.doi.org/10.1787/888932985998>

For more information

Federal Ministry of Science, Research and Economy
Austrian National Tourist Office
Statistics Austria
Austrian Bank for Tourism Development

www.bmwf.gv.at
www.austria.info
www.statistik.at
www.oeht.at