

Austria

Tourism in the economy

The direct value-added effect of tourism to the Austrian economy in 2018 is calculated to be EUR 25 billion (excluding business trips), or 6.5% of GDP, according to the Austrian Tourism Satellite Account (TSA). Based on the TSA, some 244 000 full-time job equivalents were directly attributed to tourism related industries in 2017, contributing 6.4% of overall employment in Austria. Travel exports represented 30.9% of total service exports in 2018.

The number of international tourist arrivals in all accommodation establishments (commercial and private) was 30.8 million in 2018, which was up 4.6% over 2017, and the number of bednights amounted to 110.4 million (up 4.2%). The fastest growing source markets compared with 2017 were Germany (up 2.7 million bednights), the Netherlands (up 0.3 million) and Czech Republic (up 0.2 million). Declines were registered from Switzerland and Liechtenstein (down 89 000 bednights), Italy (down 35 000) and Turkey (down 21 000).

For 2018, there was a positive balance of payments from tourism of approximately EUR 9.3 billion, an increase of EUR 660 million when compared to 2017. Income from inbound tourism totalled EUR 19.5 billion, a rise of 7.4%, while spending by Austrian residents abroad also increased by 7.3% to EUR 10.1 billion.

Domestic tourist arrivals in paid accommodation totalled 14.0 million in 2018 (up 3.0%) with 39.4 million bednights registered (up 2.2%). Record highs were registered during both the winter and summer seasons with 5.9 million and 8.2 million arrivals respectively.

Tourism governance and funding

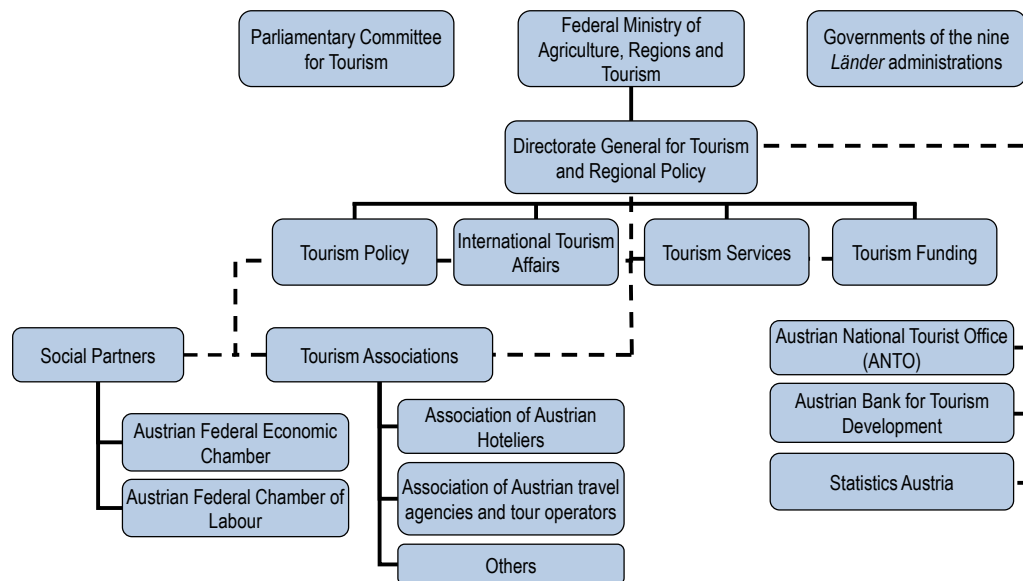
Under the Austrian Federal Constitution, the nine Länder (federal provinces) have legislative and executive responsibility for tourism affairs. As tourism is a cross cutting sector, Federal and European laws also apply.

At a national level, from January 2020 on tourism policy is the responsibility of the Federal Ministry of Agriculture, Regions and Tourism. In addition, there is a Parliamentary Committee for Tourism within the Austrian Parliament. Synergies between the national and regional levels continue to be strengthened via a Tourism Steering Group, which is chaired by the Ministry and brings together representatives of the regional tourism administrations.

Co-operation with other ministries, departments, institutions and the tourism industry is organised for specific topics either via permanent groups or for short term issues dealt with by round tables. This includes, for example, the Expert Council supporting the implementation of Plan T - Master Plan for Tourism, as well as sustainable mobility, visas and tourism ethics issues. Other issues are considered on a case-by-case basis - such as new funding schemes and legislation affecting tourism. These permanent groups and roundtables are also established to future proof policies, and enable a thorough horizon scanning process.

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

Austria: Organisational chart of tourism bodies



Source: OECD, adapted from the Federal Ministry of Ministry for Agriculture, Regions and Tourism, 2020

In 2018, the national tourism administration's budget was EUR 69.8 million. Of this total, EUR 39.6 million was administered by the Austrian Bank for Tourism Development, a specialist bank acting in a public-private partnership with the Ministry. This included EUR 23.9 million dedicated to financial support for SMEs. In addition, two special funding programmes for investments in tourism enterprises resulted in further spending of EUR 15.7 million, which explains the relatively sharp singular increase compared to previous years.

Almost EUR 24.4 million was directed to the annual budget of the Austrian National Tourist Office and a further EUR 5.8 million was disbursed by the Ministry in the form of individual subsidies for co-financing tourism projects and service contracts. Also, EUR 50 million from European Recovery Programme funds were made available for loans to tourism SMEs. 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

In 2019, the Ministry published a new national tourism strategy, the Plan T – Master Plan for Tourism, which was reemphasised by the government programme of January 2020. It lays down guidelines for the sustainable development of tourism and serves as a guide for political decisions. Sustainability in all its dimensions and a culture of co-operation are central considerations to achieve a new quality of tourism policy (Box 3.6). The Plan is supplemented by an annual action plan, which contains concrete implementation measures and facilitates a rapid response to changes in a dynamic environment. Implementation involves widespread participation of public and private actors overseen by an Expert Council together with steering groups of the *Länder*. This is underpinned by annual Tourism Days, which

are industry events organised by the Ministry, the Federal Economic Chamber and the Austrian National Tourist Office.

Key aspects of the Plan include:

- Designing tourism in a way that allows for the harmonious co-existence of both tourists and the local population, such as surveys to fully understand impacts at the local level.
- Improving the dialogue and initiating stronger co-operation with Länder, destinations, businesses, interest groups and stakeholders from other sectors.
- Supporting digital transformation, such as by supporting tourism businesses to adapt, creating data alliances and expanding e-government services (Box).
- Creating appropriate framework conditions for the tourism sector, including in the fields of taxation, business succession and new business models.
- Optimising the quality of training and better exploiting the potential for inter-business measures to improve the attractiveness of working in tourism by for example developing employee benefit schemes or better accommodation facilities.
- Working towards greater levels of sustainability, including by improving climate-friendly mobility and promoting further use of renewable energy by businesses and regions.
- Intensifying co-operation between tourism and agriculture, including in the culinary sector.
- Further developing tourism marketing, such as by rethinking destination management and optimising the use of new technologies.
- Strengthening family-run and owner-managed enterprises by providing tailor-made financing and subsidy mechanisms as well as developing new financing mechanisms with a focus on equity.
- Creating a future-oriented system of statistical indicators covering all three dimensions of sustainability.

Fostering digitalisation in Austria

Digitalisation constitutes a major challenge for the tourism sector and affects the entire tourism value chain. At the same time, it offers manifold opportunities for innovation, productivity and tailor-made solutions for both demand and supply. The Federal Ministry has therefore put a major emphasis on digitalisation in its new tourism strategy Plan T – Masterplan for Tourism. A key measure is the establishment of a new future lab at the Austrian National Tourist Office: Next Level Tourism Austria (NETA). As a central innovation hub for the tourism sector, it will focus on complex technological applications and processes for single enterprises as well as regions, and thus be a frontrunner to respond to societal and technological developments triggered by digitalisation. Due to the different levels of digitalisation across the tourism sector, it is essential to support SMEs to adapt to these new technologies. In 2019, the Ministry sought innovative flagship projects involving the co-operation of SMEs in rural areas. The transformation of SMEs to a digital economy is also supported by the horizontal programme “KMU-Digital” of the Federal Ministry for Digital and Economic Affairs.

A related initiative on R&D Competences for Industry by the Austrian Research Promotion Agency was opened for the first time to tourism stakeholders in 2018. Focusing on supporting the development of digital expertise for SMEs, a total of EUR 1.2 million was awarded to four projects bridging higher education and research institutions, and tourism SMEs. The SMEs (and their employees) benefit from developing better digital understanding and qualifications, while education and research institutions get a closer insight into practical knowhow required by businesses for their day-to-day operations. Bringing both sides closer together also helps to improve the educational offer in the field.

More and more visitors consider sustainability, climate change and the active promotion of environmentally compatible tourism to be matters of great importance. Therefore, a number of activities have been implemented by the Federal Ministry. One specific measure is the use of the Climate and Energy Fund by the regions, in co-operation with the Ministry, to support communities to implement projects in the field of renewable energy, reduction of energy consumption and sustainable mobility. Since 2009, a number of “climate and energy model regions” have been established in Austria. In 2019, for the first time, a specific call was launched for tourism with a budget of EUR 1 million supporting the establishment of a showcase region for climate-friendly tourism within the next three years.

Beyond this, there are ongoing efforts to improve the regulatory framework and to reduce the administrative burden on tourism enterprises. For example, one measure taken in 2018 was to reduce VAT on overnight stays from 13% to 10%. Another measure foreseen in Plan T is the creation of a modern regulatory and organisational framework relating to the sharing economy.

Statistical Profile

Austria: Domestic, inbound and outbound tourism

	2014	2015	2016	2017	2018
TOURISM FLOWS, THOUSAND					
Domestic tourism					
Total domestic trips	..	..	..	..	..
Overnight visitors (tourists)	12 265	12 697	13 343	13 619	14 033
Same-day visitors (excursionists)	..	..	..	..	..
Nights in all types of accommodation	35 668	36 425	38 014	38 523	39 390
Hotels and similar establishments	23 482	23 941	24 841	24 971	25 559
Other collective establishments	8 860	9 122	9 718	10 112	10 376
Private accommodation	3 326	3 362	3 455	3 441	3 454
Inbound tourism					
Total international arrivals	..	..	..	..	..
Overnight visitors (tourists)	25 291	26 728	28 121	29 460	30 816
Same-day visitors (excursionists)	..	..	..	..	..
Top markets					
Germany	11 750	12 141	12 986	13 443	14 092
Netherlands	1 672	1 735	1 863	1 935	2 001
Switzerland and Liechtenstein	1 310	1 400	1 446	1 454	1 445
Italy	1 051	1 123	1 102	1 102	1 099
United Kingdom	803	876	920	942	996
Nights in all types of accommodation	96 233	98 824	102 863	105 977	110 430
Hotels and similar establishments	61 830	63 355	65 244	66 642	68 331
Other collective establishments	16 269	16 981	18 155	19 403	20 962
Private accommodation	18 134	18 489	19 465	19 933	21 136
Outbound tourism					
Total international departures	13 544	13 002	14 246	14 068	14 628
Overnight visitors (tourists)	10 994	10 628	11 534	11 491	11 883
Same-day visitors (excursionists)	2 549	2 374	2 712	2 577	2 745
Top destinations					
Italy	2 033	1 971	2 178	2 221	2 330
Germany	2 347	2 297	2 324	2 189	2 196
Croatia	1 085	965	1 416	1 413	1 353
Spain	576	592	628	620	615
Greece	380	352	369	375	420
TOURISM RECEIPTS AND EXPENDITURE, MILLION EUR					
Inbound tourism					
Total international receipts	17 444	18 351	18 952	19 952	21 403
International travel receipts	15 676	16 435	17 401	18 112	19 559
International passenger transport receipts	1 768	1 916	1 551	1 840	1 844
Outbound tourism					
Total international expenditure	10 189	10 195	10 462	11 300	12 091
International travel expenditure	8 329	8 408	8 800	9 454	10 143
International passenger transport expenditure	1 860	1 787	1 662	1 846	1 948

.. Not available

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888934076324>

Austria: Enterprises and employment in tourism

	Number of establishments ¹	Number of persons employed				
	2017	2014	2015	2016	2017	2018
Total	..	..	..	..	..	..
Tourism industries	87 973	..	227 705	234 152	243 969	..
Accommodation services for visitors	..	..	..	..	..	..
Hotels and similar establishments	16 526	..	..	..	68 028	..
Food and beverage serving industry	30 948	..	..	..	112 075	..
Passenger transport	12 266	..	..	..	24 472	..
Air passenger transport	161	..	..	..	6 521	..
Railways passenger transport	32	..	..	..	3 442	..
Road passenger transport	11 973	..	..	..	14 310	..
Water passenger transport	100	..	..	..	199	..
Passenger transport supporting services	..	..	..	..	..	..
Transport equipment rental	2 543	..	..	..	287	..
Travel agencies and other reservation services industry	2 462	..	..	..	11 660	..
Cultural industry	21 589	..	..	..	17 302	..
Sports and recreation industry	1 639	..	..	..	10 146	..
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/10.1787/888934076343>

Austria: Internal tourism consumption

Million EUR

	2017		
	Domestic tourism expenditure	Inbound tourism expenditure	Internal tourism consumption
Total	18 330	20 517	40 147
Consumption products	18 262	20 205	39 767
Tourism characteristic products	15 383	17 399	32 782
Accommodation services for visitors	4 827	8 036	12 863
Food and beverage serving services	4 952	5 453	10 405
Passenger transport services	3 771	1 786	5 557
Air passenger transport services	2 185	1 480	3 665
Railways passenger transport services	845	277	1 121
Road passenger transport services	618	17	635
Water passenger transport services	123	13	136
Passenger transport supporting services	..	..	..
Transport equipment rental services	249	6	254
Travel agencies and other reservation services industry	105	0	105
Cultural services	1 087	832	1 919
Sports and recreation services	394	1 287	1 680
Country-specific tourism characteristic goods	..	..	..
Country-specific tourism characteristic services	..	..	..
Other consumption products	2 879	2 806	6 985
Tourism connected products	..	..	..
Non-tourism related consumption products	..	..	..
Non-consumption products	68	312	380

.. Not available

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888934076362>



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