

Austria

Tourism in the economy and outlook for recovery

Tourism is an important driver of the Austrian economy. In 2019, tourism directly contributed EUR 22 billion to the Austrian economy, equating to 5.6% of GDP, according to the Austrian Tourism Satellite Account. This resulted in 205 700 full-time equivalent jobs directly attributed to tourism, contributing to 5.2% of total employment in Austria. Travel exports represented 30% of total service exports in 2019.

The impacts of the COVID-19 pandemic saw the direct contribution of tourism to the economy fall to 3.5% of both GDP and employment. The pandemic resulted in a significant decline in tourists. In 2020, there were 15.1 million international arrivals, down 53% compared to 2019, which declined an additional 15.7% in 2021. This decline in international tourists had a significant impact on international travel receipts, which remained 56.3% below 2019 levels in 2021, at EUR 10.1 billion.

The Austrian tourism sector has traditionally been international-dominant, with international tourists accounting for almost three-quarters of nights prior to the pandemic. In 2021, domestic tourists were 34.2% below pre-pandemic levels, with 9.4 million tourists recorded, but their share of nights increased to 37%.

While in January 2022 overnight stays were still 32.6% behind figures of the same month in 2019, the tourism sector has recovered well throughout the year with 112.8 million overnights recorded between January and September (down 11 % compared to 2019), in particular due to a strong summer season (May-September, down 1.4% to 2019). The outlook for the winter season 2022/2023 is considered widely positive.

Tourism governance and funding

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

At the national level, the Federal Ministry of Labour and Economy (the State Secretary for Tourism) is responsible for tourism policy. A Parliamentary Committee for Tourism within the Austrian Parliament oversees policy. Synergies between the national and regional levels continue to be strengthened via a Steering Group for Tourism. Co-operation with other ministries, departments, institutions and the tourism sector is organised on specific topics either via permanent groups or round tables (e.g. communication, sustainable mobility, visas, tourism ethics, cycle tourism) or on a case-by-case basis (e.g. new funding schemes, new legislation affecting tourism).

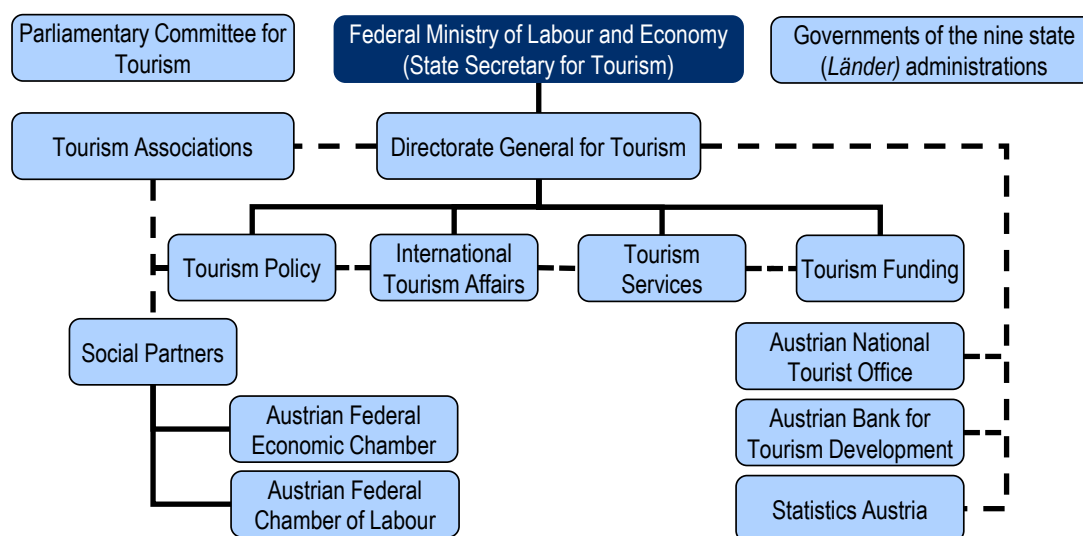
The Austrian National Tourist Office (ANTO) is the national tourism marketing organisation. ANTO is responsible for market research, brand management, marketing, tourism networking and information provision. The Ministry and the Austrian Federal Economic Chamber jointly fund ANTO. It co-operates closely with the Austrian tourism trade (e.g. Länder tourist boards, destinations, tourism businesses).

In 2021, the national tourism administration had a total budget of EUR 57.3 million. Of this, EUR 28.4 million was dedicated to financial support for SMEs, administered by the Austrian Bank for Tourism Development, a specialised bank acting in a public-private partnership. ANTO received over EUR 24 million for their annual budget (whereas in 2020, ANTO received an additional EUR 40 million for specific marketing measures to support the recovery). The Ministry disbursed EUR 5 million through individual subsidies for co-financed tourism projects and service contracts.

SMEs in the tourism sector received EUR 70 million from the European Recovery Programme for loans. In addition to the national budget, all nine Länder have their own tourism budgets to support their specific tourism development programmes.

In order to support tourism during the COVID-19 pandemic, the national tourism administration spent EUR 201 million on direct grants and provided guarantees on loans (cap: EUR 1.6 billion). In addition to above mentioned sector-specific measures, undertakings in tourism were eligible for most horizontal measures (including mainly direct grants) administered by the Ministry of Finance.

Austria: Organisational chart of tourism bodies



Source: OECD, adapted from the Federal Ministry of Labour and the Economy, 2022

Tourism policies and programmes

Austria's national tourism strategy Plan T - Masterplan for Tourism continues to be the base of national tourism policy. However, there are a number of updates in key focus areas for the medium and long term across the demand, supply and governance of tourism, and a maintained focus on quality rather than on quantity, as well as consumer safety and security.

Following the COVID-19 pandemic, Austria implemented comprehensive public support to help the tourism sector survive, through both whole-of-economy and sector-specific measures. Targeted support was necessary, especially for accommodation, hospitality and travel organisation industries, including:

- Free and comprehensive COVID-19 testing in 2020-22 for the tourism workforce and guests, reinforcing trust and confidence in Austria as a safe tourism destination (see box below).
- Tax relief package, including the reduction of VAT to 5% on accommodation and food (previously 10%) as well as drinks (previously 20%) for the period 1 July 2020 to 31 December 2021.

- Investment bonuses consisting of grants of 7% of the investment value as an incentive for enterprises to invest in their business and strengthen their competitiveness. Grants were doubled for investments in greening, digitalisation or health (total volume of EUR 7.8 billion).
- Guarantees of up to 100% for bridging loans used to cover temporary liquidity shortages caused by decreases in turnover due to COVID-19 (until the end of 2021) and grants to cover fixed costs and losses for enterprises affected by closures (until September 2021).
- Support for event organisers with financial compensation in case the event is cancelled or restricted due to COVID-19 (March 2021 - December 2022); total volume of EUR 300 million (administered by the Austrian Bank for Tourism Development). Maximum support per event organiser amounts to EUR 10 million.
- Support for package travel organisers where the Austrian Bank for Tourism Development guaranteed down payments by travellers in case of insolvency of the package travel organiser in 2021-22 (total package limit of EUR 300 million).
- Support for private accommodation landlords and farms that offer accommodation services through “Agrarmarkt Austria GmbH” - which ended in March 2022.

In the longer term, enterprises need continued support with new financing arrangements, particularly given many businesses’ difficult liquidity and equity positions, while also addressing labour force shortages and skills requirements. In addition, a stronger focus is put on the green and digital transition in tourism and the development of regions and cities. In 2022, Austria created a new ecolabel for tourism destinations to accelerate the green transition, improve regional value chains and respond to the increased demand for sustainable holidays (see Box 3.7).

Strong governance, co-ordination and information are key for the tourism sector in Austria, with co-ordination between tourism and regional policy to strengthen local and regional value chains a necessity.

Changes in consumer trends present new challenges and opportunities. The recent strategic reorientation of the Austrian National Tourist Office (ÖW2026) will facilitate addressing promising markets with enhanced communication, co-operation and innovation.

Free COVID-19 testing for visitors and tourism employees in Austria

During the COVID-19 pandemic, Austria offered unlimited, free-of-charge testing for visitors. As of April 2022, the limit was set to five self-tests and five PCR tests per person/month. This was supported by a nationwide testing infrastructure, including PCR tests, antigen tests and self-tests offered in various settings, and a dedicated testing website that contained the entire testing offer and allowed online registration.

In addition to the general testing infrastructure, in July 2020 the Ministry of Tourism introduced a testing programme named “Safe Hospitality” (Testangebot Sichere Gastfreundschaft) for the tourism industry that ran until April 2022. The initiative offered up to one free COVID-19 PCR test per week for employees in the accommodation, gastronomy, travel agency, skiing, snowboarding and tour guide sectors.

The process was fully digital and started with voluntary online registration. The Ministry of Tourism provided a list of approximately 40 participating laboratories from which employees could choose. The laboratories offered a mobile service, visiting establishments for employee convenience.

By April 2022, 2.5 million tests were conducted in over 10 000 establishments - compared to 630 000 tests in 6 700 establishments in 2020.

Statistical Profile

Austria: Domestic, inbound and outbound tourism

	2017	2018	2019	2020	2021
TOURISM FLOWS, THOUSAND					
Domestic tourism					
Total domestic trips	..	..	..	..	..
Overnight visitors (tourists)	13 619	14 033	14 312	9 939	9 416
Same-day visitors (excursionists)	..	..	..	..	..
Nights in all types of accommodation	38 523	39 390	39 944	31 596	29 599
Hotels and similar establishments	33 539	34 201	34 767	25 724	24 577
Other collective establishments	1 543	1 734	1 737	2 267	2 098
Private accommodation	3 441	3 454	3 440	3 605	2 924
Inbound tourism					
Total international arrivals	..	..	..	..	..
Overnight visitors (tourists)	29 460	30 816	31 884	15 091	12 728
Same-day visitors (excursionists)	..	..	..	..	..
Top markets					
Germany	13 443	14 092	14 383	8 550	7 810
Netherlands	1 935	2 001	2 074	1 361	934
Switzerland and Liechtenstein	1 454	1 445	1 451	805	573
Italy	1 102	1 099	1 108	331	335
United Kingdom	942	996	966	304	86
Nights in all types of accommodation	105 977	110 430	112 765	66 280	49 964
Hotels and similar establishments	81 179	84 078	85 982	47 408	35 753
Other collective establishments	4 865	5 216	5 404	3 735	4 282
Private accommodation	19 933	21 136	21 379	15 137	9 930
Outbound tourism					
Total international departures	14 068	13 646	14 388	5 072	8 628
Overnight visitors (tourists)	11 491	11 043	11 902	3 965	7 522
Same-day visitors (excursionists)	2 577	2 604	2 486	1 108	1 106
Top destinations					
Italy	2 221	2 058	2 269	749	1 994
Germany	2 189	2 044	2 559	1 154	1 633
Croatia	1 413	1 375	1 000	237	845
Greece	375	322	577	93	469
Spain	620	504	629	129	351
TOURISM RECEIPTS AND EXPENDITURE, MILLION EUR					
Inbound tourism					
Total international receipts	19 952	21 404	23 127	13 436	10 094
International travel receipts	18 112	19 559	20 493	12 124	8 762
International passenger transport receipts	1 840	1 845	2 634	1 312	1 332
Outbound tourism					
Total international expenditure	11 300	11 967	12 491	4 526	7 463
International travel expenditure	9 454	10 019	10 364	3 925	6 810
International passenger transport expenditure	1 846	1 948	2 127	601	653

.. Not available

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/420s5l>

Austria: Enterprises and employment in tourism

	Number of establishments ¹	Number of persons employed				
	2018	2017	2018	2019	2020	2021
Total	..	..	..	..	..	..
Tourism industries	89 544	191 466	199 293	205 674	137 756	..
Accommodation services for visitors	..	..	130 563	134 686	102 465	..
Hotels and similar establishments	16 577	..	..	..	..	..
Food and beverage serving industry	31 597	..	..	..	..	..
Passenger transport	12 489	..	34 536	35 750	12 124	..
Air passenger transport	169	..	6 668	..	..	..
Railways passenger transport	32	..	3 490	..	..	..
Road passenger transport	12 199	..	20 869	..	..	..
Water passenger transport	89	..	244	..	..	..
Passenger transport supporting services	..	..	..	..	..	..
Transport equipment rental	2 675	..	33	34	32	..
Travel agencies and other reservation services industry	2 488	..	11 480	11 868	10 836	..
Cultural industry	21 980	..	22 681	23 337	12 300	..
Sports and recreation industry	1 738	..	6 036	..	..	..
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  <https://stat.link/tzcpwk>

Austria: Internal tourism consumption

Million EUR

	2020		
	Domestic tourism expenditure	Inbound tourism expenditure	Internal tourism consumption
Total	9 148	11 760	21 265
Consumption products
Tourism characteristic products
Accommodation services for visitors	7 512
Food and beverage serving services	4 319
Passenger transport services	2 575
Air passenger transport services	708
Railways passenger transport services	413
Road passenger transport services	1 444
Water passenger transport services	10
Passenger transport supporting services
Transport equipment rental services	39
Travel agencies and other reservation services industry	660
Cultural services	1 380
Sports and recreation services
Country-specific tourism characteristic goods
Country-specific tourism characteristic services
Other consumption products	4 780
Tourism connected products
Non-tourism related consumption products
Non-consumption products

.. Not available

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/u6edq9>



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