Tourism developments in Austria
Structural changes in regard to overnight tourism 1992 - 2012

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Outline

- Official Tourism & Travel Statistics at Statistics Austria
- Developments 1992-2012 in Austria by
  - markets
  - destination
  - kind of accommodation
- Conclusions
Tourism & Travel Statistics STAT

Primary Statistics

- Monthly arrivals & overnight stays
- Yearly accommodation capacity
- Trips with overnight stay
- Same-day trips

Accommodation in AT

Travel Behavior of Austrians

Accounts

- Travel Balance of Payments
  - Income from incoming travel
  - Spending on outgoing travel
- Tourism Satellite Accounts
  - Value added
  - Labor force

Tourism & Travel Statistics

- 36 mill. arrivals
- 131 mill. overnight stays
- 1 mill. beds
- 65 000 establishments
- 18 mill. private trips
- 4 mill. business trips
- about 70 mill. same-day visits

Monthly arrivals & overnight stays

Yearly accommodation capacity

Accommodation in Austria

Travel Behaviour of Austrians

Tourism & Travel Statistics

Main results 2012

- Travel Balance of Payments
  - Income from incoming travel
  - Spending on outgoing travel
- Tourism Satellite Accounts
  - Value added
  - Labour force

- Without passenger transport: 14.7 bn. Euro
- Without passenger transport: 7.9 Mrd.
- 31.5 bn. Euro total expenditure
- 17.0 bn. Euro tourism value added
- 5.5% of GDP
- 315 000 direct employed*
- 255 000 direct FTE*
- 7% of total economy*

* Results 2011
Developments 1992 - 2012
(based on data of accommodation statistics)

Markets in Austria 1992 and 2012

1992:
- Germany, Austria, Netherlands: 80.0% of total nights
- CEE-countries: 2.1% of total nights
- Asian countries: 0.6% of total nights

2012:
- Germany, Austria, Netherlands: 72.6% of total nights
- CEE-countries: 10.8% of total nights
- Asian countries: 1.9% of total nights
Urban tourism in Austria 1992 and 2012

- Between 1992 and 2012 nights related to total urban tourism (8 capitals of the federal territories and Vienna) increased by 60.2% to 18.84 mill., total nights remained rather stable (about 130 mill)
- Share of urban tourism related to total nights increased from 9.0% in 1992 to 14.4% in 2012
- In regard to nights spent Vienna, Salzburg and Innsbruck have been remained the most important cities (1992-2012: +78.2%, +44.1% and +6.9%) during the last 20 years
- Between 1992 and 2012 country side tourism decreased by 5.5% to 112.18 mill. nights

Bed capacities in tourists accommodation 1992 and 2012

1992:
- 5-/4-star beds: 13.0% of total beds available
- 3-star beds: 19.7% of total beds available
- 2-/1-star beds: 23.9% of total beds available
- Beds in private rented accommodation: 35.9% of total beds available

2012:
- 5-/4-star beds: 23.7% of total beds available
- 3-star beds: 19.8% of total beds available
- 2-/1-star beds: 10.9% of total beds available
- Beds in private rented accommodation: 28.1% of total beds available
Conclusions: 1992-2012

- Better diversification of markets:
  - Domestic tourism showing increasing and rather stable developments, new record mark in 2012
  - Less German tourists (1992-2012: -23.3%), but still the most important guests
  - Other traditional markets are loosing shares (UK, Italy, Belgium, France, USA, Sweden), some are facing increases (Netherlands, Switzerland, Denmark)
  - Guest nights from CEE-countries (in particular Russia) and Asia are continuously increasing

- Urban tourism has been facing a more prosperous development than country side tourism:
  - Urban tourism increased by 60%, country side tourism decreased by 6%
  - Share of urban tourism related to total tourism increased by 5.4%-points
  - Vienna – the capital of Austria – more than doubled its nights spent (+78%)

- Quality of tourist accommodation has been increasing:
  - The offer of bed capacities in high quality hotels has been increasing (in particular beds in 5-/4-star hotels; +10%-points)
  - Beds in rented private accommodation loosing importance, but they are still relevant (1992: 35.9%, 2012: 28.1% of total beds available)

...so far, Austrian overnight tourism seems to be less concerned by economic slowdowns although decreasing revenues occur!

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