

ANNUAL TOURISM REPORT 2012

AUSTRIA

1. INTRODUCTION

Council Decision 86/664/EEC of 22 December 1986¹ establishing a consultation and cooperation procedure in the field of tourism foresees that *'each Member State shall send the Commission, once a year, a report on the most significant measures it has taken and, as far as possible, on measures it is considering taking in the provision of services for tourists which could have consequences for travellers from the other Member States'*.

With the publication of the Communication *'Agenda for a sustainable and competitive European tourism'*, thereafter referred to as *'Agenda'*, the Commission announced that *'in order to strengthen the collaboration with and among Member States, their current annual reporting through the Tourism Advisory Committee (TAC) will be used to facilitate the exchange and the dissemination of information about how their policies and actions safeguard the sustainability of tourism'*. The Communication also recognised that sustainability and competitiveness are integral parts of a comprehensive approach towards tourism management and development.

This Communication was welcomed by the Competitiveness Council conclusions (22nd-23rd November 2007) and by the Presidency Conclusions of the Brussels European Council of 14th December 2007.

The main aims for the reporting process are to:

- be able to monitor the level of implementation of the *'Agenda for a sustainable and competitive European tourism'* by Member States;
- provide an opportunity for Member States to make visible at European level the ideas and initiatives that they have developed or are developing regarding tourism issues;
- facilitate the exchange of experiences among Member States with regard to how they tackle issues which are important for the competitiveness and sustainability of European tourism.

MS reports referring to year n shall be sent to the European Commission by the end of February of year $n+1$.

If the reports are sent in English, the deadline can be moved to the end of April.

An update of tourism data will be provided by EUROSTAT in the month of September of year $n+1$ (before the European Tourism Forum).

In order to reduce the length of the report, it is recommended to provide links to relevant websites where further details can be found (so that those interested on a specific issue can find out more about i.e. the leading organisation, details of a scheme) and to introduce these links with a brief introduction summarising the most relevant info.

¹ Official Journal L 384, 31/12/1986 P. 0052 – 0053.

2. ORGANISATIONAL STRUCTURE

This section should provide an overview of the main organisational structure to illustrate how tourism is organised and managed, to identify linkages and to identify the engagement of other organisations/stakeholders.

The information required will only need to be prepared fully in year 1 as it will subsequently only be necessary to provide details of any changes.

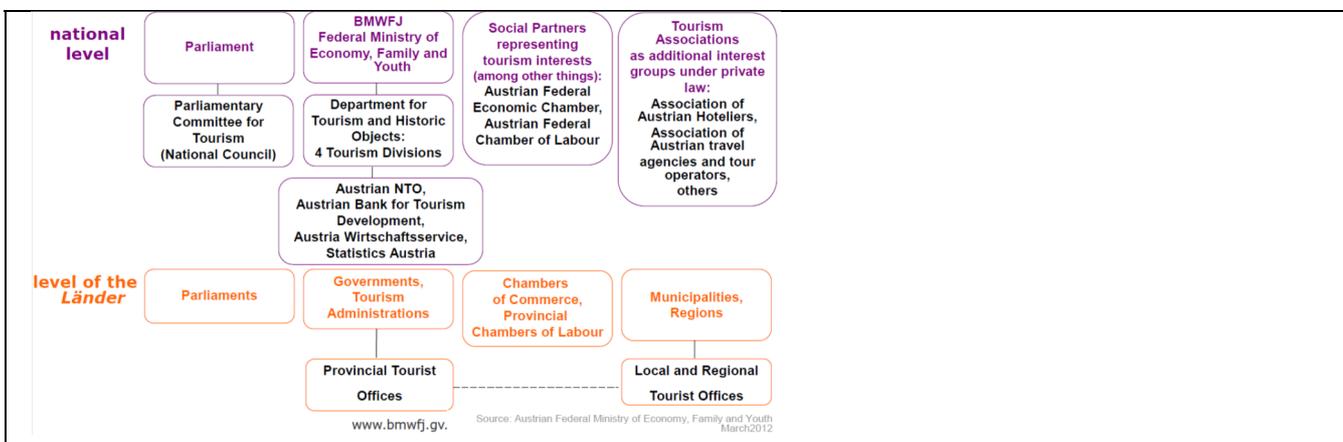
2.1 Please identify the national bodies responsible for tourism (Ministry and also any separate/related National Tourism Organisation), including their mission and spheres of competence, and their connection to other national bodies with direct or indirect influence in tourism. (maximum of 1.000 characters)

According to the Austrian Federal Constitution the nine *Länder* (federal states) have the legislative and executive competencies for tourism affairs. Nevertheless, as tourism is a typical cross-cutting sector, both federal and European laws take effect. In 2006, the Austrian Parliament established the Parliamentary Committee for Tourism. On the national level, tourism policy is the business of the Federal Minister of Economy, Family and Youth ('the Ministry'). In 2010 the Ministry launched a tourism strategy with the objective of a close and strategic co-ordination in tourism issues. The strategy also strengthens the co-ordination between the national level and the federal level (see below).

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. tourist boards of the *Länder*, destinations and tourism businesses). Core competencies of ANTO are the brand management, innovative and modern marketing, both domestic and international, and tourism networking and information brokering (expert knowledge on trends, markets, product development). In its international strategy it focuses on increasing Austria's market share in the most promising international markets.

Links: www.austria.info b2c and <http://www.austriatourism.com> b2b.

2.2 Please provide a **diagram/organigram of the organisational structure for tourism** identifying the connection between national, regional and local bodies. Provide also a short description of the core responsibilities and competencies of each of the organisations. Include also information about mechanisms of decision making process and participation (e.g. forums, advisory committees, other existing coordination mechanisms) from outsider organisations (e.g. other departments, stakeholder organisations and unions). (maximum 2 pages)



2.3 Please provide information about **financial data**, including tourism budget as a percentage of overall government budget, the amount of national funding support for tourism marketing, the amount of EU funding

support made available for tourism and data concerning the support to SMEs and destinations. (1000 characters)

No figures are available about the tourism budget as a percentage of overall government spending due to the decentralized competences (see 2.2). In 2012, the national tourism administration dispensed a budget of EUR 59.4 million.

Of this total, EUR 27.5 million was dedicated to the financial support of 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 was directed to the annual budget of ANTO; and EUR 7.6 million was disbursed by the Ministry in the form of individual subsidies for co-financing tourism projects. Also, EUR 50.0 million in European Recovery Programme (ERP) funds was made available for loans to SMEs in the tourism industry. In addition to the national budget, all nine 'Länder' have their own tourism budgets in order to support their specific tourism development programmes.

The funding programmes for SMEs administered by the Austrian Bank for Tourism Development are subject to a regular evaluation. The respective indicators are stipulated in the programme guidelines.

3. POLICIES AND STRATEGIES

3.1 Is there a current **National Strategy for tourism**? Yes No

If yes, please, provide information in bullet point format about the **key aims, objectives and priorities** of the strategy highlighting those that are designed to address sustainability issues in economic, environmental and social terms in particular those related in the six aims included in the Agenda. In the **formulation process of the tourism strategy**, briefly explain whether and how consideration has been given to the 9 principles set out in the Agenda (para.2.3 p5) and given in the appendix. (maximum 2000 characters)

In spring 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. Key element of the strategy is the focus on Austria's USPs, in particular with regard to marketing: the Alps, the Danube and lakes, the cities and culture. The new tourism strategy is work in progress and is reviewed and adapted to international and national developments on a yearly basis by a high level Tourism Conference. The Conference is co-ordinated and prepared by a steering committee consisting of high-ranking representatives from the Ministry and the nine *Länder*. In addition, an independent expert advisory group (scholars) reports to the conference on trends, current challenges and gives recommendations for future actions.

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

1. Marketing: marketing measures will emphasise Austria's unique selling propositions (USPs). Close co-operation between ANTO, the nine tourism marketing organisations of the *Länder*, and destinations will streamline activities and enhance efficiency.
2. Subsidies: The Ministry continues the strong public-private partnership with the Austrian Bank for Tourism Development, which handles SME funding programmes. Main objectives of these programmes are to encourage investments, to improve the quality and size of tourism enterprises, to enhance co-operation, to optimise enterprises' financial structure, and to encourage new business start-ups.

In addition, from 2009 onwards 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. The newly installed *Förderpyramide* - a co-ordination instrument for funding at national and federal level - defines competences more effectively, reflects the importance and size of projects and helps to increase transparency for SMEs.

The guidelines for the tourism funding programmes on federal level are going to expire by the end of 2013 and are therefore evaluated throughout 2013. With the gained data the new tourism funding programmes effective from 2014 shall be even more effective and meet future needs.

In 2012, first discussions took place with regard to start the programming of CSF funds for the new Multiannual period 2014-2020. Since the hierarchy of objectives in the respective proposals of the European Commission do not address the tourism sector as an investment priority, the responsible persons for tourism on national and Länder level agreed to undertake efforts at all levels to set nevertheless a specific focus on tourism in the relevant documents, such as the partnership agreement

3. Innovation: the following measures have been taken: a bi-annual award organised in co-operation with the *Länder*, dedicated to innovative best practice in tourism since 2012; product-innovation workshops organised by ANTO; and increased subsidies for innovation. One such subsidy is the so-called *Innovationsmillion*, which supports innovative tourism projects based on stakeholder co-operation on the destination level, and for which the Ministry, together with the *Länder*, provides EUR 1 million per year. The selection of the projects follows a call for proposals, which are evaluated by a jury of experts. In 2012 7 innovative projects out of 17 submitted ones were awarded.
4. Infrastructure: main focus lies on the following measures: development of infrastructure for summer and off-season tourism; the co-operation among regions and municipalities as regards infrastructure 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); to increase mobility via public transport to, from and within tourism regions; initiatives and projects with emphasis on 'Tourism for All' (in particular barrier-free tourism: special subsidies for consulting, publication of brochures and organisation of events and awards).
5. Business environment: prior objective here 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 improve the image and competitiveness of jobs in tourism (e.g. by supporting information and image campaigns)

An updated document on the implementation of the strategy can be found on the following webpage: <http://www.bmwfj.gv.at/Tourismus/TourismuspolitischeAktivitaeten/Seiten/Tourismusstrategie.aspx>

3.2 Who was the *initiator* and who is *responsible* for its implementation? (maximum 500 characters)

The Ministry was the initiator of the strategy building process and is responsible for its implementation and further development at the national level.

3.3 How is the strategy *monitored* and how often? (maximum 1000 characters)

The steering committee (see 3.1) co-ordinates and monitors the implementation of the strategy, organises workshops on current topics (e.g. climate change, education) and prepares the annual tourism conference. The implementation of the tourism strategy is being monitored continuously. The tourism conference looks back on the previous year(s) and deals with new future challenges.

3.4 What *national legislation* exists which is specific for tourism or which has a major impact on the sector? (maximum 2000 characters)

At the national level the Federal Ministries and Bodies are among others responsible for:

- Commercial law*
- Labour legislation: Working Time Act, Working Rest Act, Children and Youth Employment Act, Maternity Protection Act (Tourism is one of the few sectors for which numerous special arrangements exist within the legal protection regulations for employees)
- Internal security
- Fiscal system
- Partly: environmental laws
- Tourism funding*
- Tourism statistics*: National regulation on tourism statistics based on the EU directive
- International agreements of tourism-related matters*

* Responsibility: The Ministry

Links: The legal information system of the Republic of Austria (RIS) <http://www.ris.bka.gv.at/> and BMWFJ <http://www.bmwfj.gv.at/tourismus>

The *Länder* are responsible for:

- Tourism laws and regulations
- Partly: environmental laws and regulations
- Regional/spatial planning
- Infrastructural issues
- Tourism funding on the *Länder* level

4. MEASURES AND INITIATIVES

This section provides Member States with an opportunity to outline *specific initiatives and policies* that are or are going to be adopted to manage and develop tourism activity in ways which respond to the key challenges referred to in the 'Agenda' and which fall within the six main aims of the 'Agenda' itself.

These initiatives could for instance fall into the following types of policy instruments: command and control instruments (legislation, regulation and licensing, land use planning and development control), voluntary instruments (guidelines and codes of conduct, reporting and auditing, certification, eco-labels, awards, voluntary contributions), economic instruments (taxes and charges, financial incentives and agreements), supporting instruments (infrastructure provision and management, capacity building, awareness raising, marketing and information services), measurement instruments (benchmarking, assessments on optimal use levels, carrying capacity).

1 Economic prosperity

- a. To ensure the long term competitiveness, viability and prosperity of tourism enterprises and destinations.
- b. To provide quality employment opportunities, offering fair pay and conditions for all employees and avoiding all forms of discrimination.

2 Social equity and cohesion

- a. To enhance the quality of life of local communities through tourism, and engage them in its planning and management
- b. To provide a safe, satisfying and fulfilling experience for visitors, available to all without discrimination by gender, race, religion, disability or in other ways.

3 Environmental and cultural protection

- a. To minimise pollution and degradation of the global and local environment and the use of scarce resources by tourism activities.
- b. To maintain and strengthen cultural richness and biodiversity and contribute to their appreciation and conservation.

4.1 Please set out, briefly, the **steps** which have been or will be taken, if any, **to address the 7 key challenges** for the delivery of sustainable and competitive tourism, covered in the TSG report and referred to in the 'Agenda'.

4.1.1 Reducing the seasonality of demand. (maximum 1000 characters)

One of the most important issues within the **'Tourism funding directive'** is to establish all-season tourism or to expand the high seasons.

Link: <http://www.bmwfj.gv.at/Tourismus/Tourismusfoerderung/Seiten/Foerderungsprogramme2011-2013.aspx>

One example for reducing the seasonality of demand is convention tourism: Highest numbers of conventions in Austria in November, followed by May, September and October. In 2012, conventions and meetings supported to reduce the seasonality of demand (Austria No. 8 worldwide, average daily expenditures 475 EUR - approx. 83 % higher than average daily expenditures of tourists).

4.1.2 Addressing the impact of tourism transport. (maximum 1000 characters)

A study with focus on tourism mobility and its prospective requirements and needs has been commissioned by

the Ministry.

4.1.3 Improving the quality of tourism jobs. (maximum 1000 characters)

Several activities have been undertaken at the national level in order to promote the attractiveness of jobs in tourism and to improve the image of the tourism industry as a promising employer.

The Ministry attaches great importance to a favourable development of the tourism labour market, an improved image and competitiveness of jobs in tourism.

To this end, the Ministry has published a number of guides:

- "A Job in Tourism. Educational opportunities and training systems in Austria", providing valuable information on education and training opportunities in the field of tourism. The handbook is targeted at pupils, students, teachers, parents and those undertaking training.
http://www.bmwfj.gv.at/Tourismus/TourismusstudienUndPublikationen/Documents/7%20%20Okt%20%20%202010%20Ein%20Job%20im%20Tourismus_HP%20Versionkorr.pdf
- "Mit Stil zum Ziel", giving advice on how to successfully apply for a job in the tourism industry.
http://www.bmwfj.gv.at/tourismus/tourismusstudienundpublikationen/documents/a4_folder_mit%20stil%20zum%20ziel_minimiert.pdf
- "A career in tourism - be there!" providing information on job opportunities in the tourism sector in German, English, Serbo-Croatian and Turkish.
http://www.bmwfj.gv.at/Tourismus/TourismusstudienUndPublikationen/Documents/KarriereTourismus_HP%20VERSION.PDF

The Ministry supports international internships (three to five weeks) for apprentices in tourism.

http://www.bmwfj.gv.at/Tourismus/TourismusstudienUndPublikationen/Documents/IFA-Folder%20NEUE%20FASSUNG_MINIMIERT.pdf

Additionally, the Austrian public employment service AMS has been implementing specific training schemes for employees in the tourism industry (e.g. regional qualification programmes, pre-season trainings, 'subsidies of distance' for job-seekers willing to accept a distant place of work, etc.).

The BMWFJ takes part in an information-campaign called "Glücksbringer", which has been initiated by the Austrian Economic Chambers and which aims at informing pupils about career-choices in the tourism sector. Part of the campaign is a discount card for the approximately 11,000 apprentices in the Austrian tourism industry that is also co-branded by the European Youth Card. By using this card, apprentices can access 1,000 offers in Austria and further 50,000 offers in other European countries in the areas of leisure, sport, culture, events, travel and services. <http://www.gluecksbringer.cc/>

Furthermore, the Ministry supports workshops in tourism-schools, where experts show pupils the barrier free way of dealing with guests.

4.1.4 Maintaining and enhancing community prosperity and the quality of life, in the face of change. (maximum 1000 characters)

For several years, Austrian tourism has pursued the concept of quality tourism. Instead of capacity building measures, the emphasis lies on quality improvement in every field - aiming at a high-quality tourist offer including ecological and social aspects. The actual understanding of 'quality' does not only refer to the single components of a journey like accommodation or services. 'Quality' today also means preserving a healthy environment as well as cultural and regional identity.

The objective is to improve the economic and social living conditions by simultaneously safeguarding the ecological basis of life. Thus 'quality in tourism' and 'sustainable development' are not conceived as opposites but rather as the basis of a sound future tourism development.

4.1.5 Minimising resource use and the production of waste. (maximum 1000 characters)

- **Austrian Eco-label for Tourism**

by the Federal Ministry of Agriculture, Forestry, Environment and Water Management
<http://lebensministerium.at> and <http://www.umweltzeichen.at/>

- **Sustainable Building in Tourism**

In 2006, the Ministry published 'Guidelines for sustainable building in tourism' which were elaborated by a team of experienced tourism and financial experts, planners, and building utility system experts. These guidelines

published in a manual shall assist entrepreneurs in making their decisions concerning 'sustainable building solutions' for new tourism facilities and for extensions or modifications of existing facilities. Link: <http://www.bmwfj.gv.at/NR/rdonlyres/9659D5D6-C7C8-42C2-B115-8A4BB86DC5E1/0/NachhaltigesBauenimTourismusLeitlinien.pdf>

- **Energy efficiency**

In 2009, the Ministry (in co-operation with the Federal Chamber of Commerce and the Association of Austrian Hoteliers) published a guidebook 'Energy management in hotels and restaurants'. The guidebook identifies the energy-saving potential of tourism facilities, upgrading measures and guides tourism entrepreneurs from idea to realization.

- **Alpine Huts**

There are approximately 1,000 alpine huts which make a considerable part of infrastructure for the very popular hiking tourism. Due to the increasing quality requirements of the guests and in order to fulfil building standards, reconstructions and modifications of many huts are necessary. Since 1991, the Ministry has financially supported sustainable reconstructions of alpine huts. Link: <http://www.vavoe.at/>

4.1.6 Conserving and giving value to natural and cultural heritage. (maximum 1000 characters)

The Ministry runs and supports **a number of awards** in order to raise awareness of the importance of natural and cultural heritage in tourism. In 1999 Austria established the *National Award for Tourism*, which has been awarded every second year by the Ministry to innovative actors in the tourism industry. The Award is dedicated each time to a special theme (e. g. 2007: 'Gardens in Austria', 2008 National Award for Architecture was dedicated to architecture in tourism 2009 'Energy Efficiency in hotels and restaurants', 2011 'Innovative human resource management in tourism').

The Ministry promotes research, networking and innovation in the tourism industry and brings together stakeholders with the aim of deepening or sharing knowledge on selected issues and supporting innovative product development. Examples of such networking initiatives e.g. in cultural tourism are the foundation of the working groups '*Imperial Austria - Residences*' (<http://www.imperial-austria.at/>) and '*Creative Austria*' (<http://www.creativeaustria.at/>). Work is ongoing in other areas e. g. national and nature parks.

Austria participates in the EU initiative EDEN - *European Destinations of Excellence* - which has been carried out from 2007 onwards.

In 2012 the EDEN Academy was launched. A two days event allowed participants from the previous award winning destinations, finalists and other interested destinations to discuss topics like marketing/communication/promotion, international appearance, product development, sustainable destination development, etc. with experts. A working situation in small peer groups lead by experts encouraged the participants to focus on concrete topics and problems. This was very successful and appreciated by the destinations. In addition the EDEN winners of the last years were supported by the Austrian NTO with regard to their product development as well as marketing and communication strategies.

<http://www.austria.info/at/eden>

In 2013, the Ministry, in cooperation with the NTO will organize the national EDEN Award "Tourism for all" (see also 4.1.7).

4.1.7 Making holidays available to all. (maximum 1000 characters)

The Ministry supports a number of initiatives and projects for setting the framework conditions and giving an impetus to facilitating tourism and leisure activities for everyone ('Tourism for All' in particular for barrier-free tourism). Among these initiatives are

- Series of workshops on 'Barrierefreies Reisen für alle' (barrier-free travel for all)
- publication of 5 brochures, e.g. 'Travelling for all - barrier free planning and constructing in tourism' and 'Tourism for all - guidebook for barrier free natural offerings'
<http://www.bmwfj.gv.at/Tourismus/TourismuspolitischeAktivitaeten/Seiten/Tourismusfüralle-BarrierefreiesReisen.aspx>
- organisation of informative events and awards
- organisation and support of workshops in tourism-schools about barrier free way of dealing with guests

In 2011, the Ministry initiated a national competition 'Tourism for all - regional initiatives for barrier-free travel'. The winning destination received EUR 40.000,00 for a distinct project. Following this competition for identifying model-regions, support is given to destinations in order to extend barrier-free tourism offers to the entire

horizontal service chain.

In 2013, the Ministry, in cooperation with the NTO will organize the national EDEN Award "Tourism for all".

<http://www.austriatourism.com/eden/eden-award-2013/>

4.2 As key challenges may change over time, please identify any other areas that are **becoming a new challenge**. (maximum 1000 characters)

- Enhancing innovation in tourism
- Increasing the competitiveness of tourism enterprises
- Enforcing all-season tourism
- Climate change
- E- and M-tourism
- Transport and mobility

4.3 Please identify and describe one **SPECIFIC INITIATIVE** (i.e. how it worked, difficulties and problems encountered, solutions and success factors), which is related to the 7 key challenges, that is **INNOVATIVE/SUCCESSFUL** and which would be of interest to or of help to other Member States. (maximum 2 pages)

Initiative 'Alpines Wegeinformationssystem (AWIS)' - as in the previous year

5. MECHANISMS FOR IMPLEMENTATION

The 'Agenda' identified three mechanisms for its implementation: sustainable destinations, sustainable businesses and responsible tourists.

5.1 Sustainable destinations: What support is given to strengthen destination management at the regional/destination level (supportive policy environment, knowledge networks, training programmes, establishment of measures/indicators for benchmarking, etc.)? (maximum 1000 characters)

Austria also participates in the EU Initiative EDEN - *European Destinations of Excellence* (see 4.1.6 and 4.1.7).

In 2013 the new actb_experience, organized by ANTO, is dedicated to 'sustainability' (*'tourism in transition. Nachhaltige Beiträge des österreichischen Tourismus in Zeiten des Umbruchs'*). The focus is not on sale but on product experience and inspiration for decision-makers.

Several initiatives for destination management were supported by the Länder (e.g. sustainability workshops from the Tyrolean Tourist Office).

5.2 Sustainable businesses: What support is given to strengthen the sustainability and competitiveness of businesses (supportive policy environment, orientation of business support services to sustainability, training, financial incentives, etc.)? (maximum 1000 characters)

For the past years sustainable tourism and the challenges of climate change have been a priority of the Ministry's tourism policy, with the overall aim of fostering quality tourism and addressing seasonality.

In order to inform actors in the tourism industry about implications of climate change and possible response strategies, the Ministry supports awareness raising and information measures in co-operation with other important stakeholders (e.g. publication of best practices, contact points and subsidies for the tourism industry as regards clean energy, water, construction and mobility together with the Federal Ministry of Agriculture, Forestry, Environment and Water Management and other partners);

Furthermore, the Ministry has supported the national research programme on climate change and its effects (StartClim, Link: www.austroclim.at/startclim) since the start of programme in 2002, commissioning several studies on the effects of climate change on the tourism sector. *'Hot town, summer in the city – the effects of summer days on recreation and leisure behaviour as well as the sightseeing programme of city tourists – using*

the example of Vienna', has been published in 2011.

Recently, the BMWFJ has published the study "Impacts of Climate Change on Tourism in Austria 2030" <http://www.bmwfj.gv.at/Tourismus/TourismusstudienUndPublikationen/Documents/Studie%20Klimawandel%20u.%20Tourismus%20in%20O.%202030%20Kurzfassung.pdf>

5.3 Responsible tourists: What support is given to promote responsible choices by tourists (e.g. sustainability in education, national marketing and media campaigns, promotion of certification schemes)? (maximum 1000 characters)

- Austrian Eco-label (see 4.1.5)
- Sustainability is an issue in ANTO marketing campaigns and an integrated part of Austria's brand value as a tourism destination. However, there is no distinct target group marketing 'sustainability' as it is regarded more as a horizontal issue.
- The Ministry has already set up several initiatives in order to disseminate the UNWTO Code of Ethics, e.g. target-group specific brochures of the Code of Ethics for all stakeholders in tourism. EU-project 'Offenders beware' 2008-2011: Teaching materials regarding responsible tourist behaviour, child labour and countermeasures against sexual exploitation in the global travel industry have been distributed among 60 tourism schools and higher educational institutions. <http://www.bmwfj.gv.at/Tourismus/TourismuspolitischeAktivitaeten/Seiten/Ethik.aspx>
- Awareness campaign together with Switzerland and Germany against the sexual exploitation of children in Tourism
- Education: Media package (see 4.1.3) including topics such as ethics in tourism and sustainability.
- Corporate Social Responsibility: A guide for tourism businesses and destinations to better understand and implement CSR has been published in 2012.
- All studies and publications are available via <http://www.bmwfj.gv.at/Tourismus/TourismusstudienUndPublikationen/Seiten/default.aspx>

6. DATA AND INDICATORS

Eurostat will provide, as an annex, the key statistical data required to support the reporting process covering around 20 indicators² (see appendix for a provisional list). These are mainly related to the aim of 'economic prosperity'.

Please, identify indicators that are being used or developed at national / regional level which could add to the range of information being provided by Eurostat, particularly in relation to social and environmental issues (e.g. other indicators from the TSG report, visitors/ residents satisfaction). (maximum 1000 characters)

TourMIS is a Marketing-Information-System for tourism managers. The major aim of TourMIS is to provide information and decision support for tourism managers and scholars. TourMIS provides on-line tourism survey data, as well as various tools to transform data into precious management information. Since 2000, this initiative has provided the tourism industry with predominantly free access to overall data and functions of TourMIS (registration is required). It holds the largest regularly updated database on city tourism statistics in Europe. TourMIS is open to all authorized tourism organizations, societies, tourism consultants, companies, tourism training centres, pressure groups, etc. in Austria and abroad. In 2011, the system had 19,000 registered users and answered about 200,000 inquiries. The development of TourMIS is financially supported by the Austrian National Tourism Organization (Link: <http://www.austria.info>), European Cities Marketing (Link: <http://www.europeancitiesmarketing.com>) and the European Travel Commission (Link: <http://www.etc-corporate.org/>). In 2011, TourMIS (represented by MODUL University Vienna and the Austrian National Tourism Organization) has been awarded by the UNWTO with the Ulysses Prize for Innovation in Tourism Enterprises. TourMIS. Link: www.tourmis.info

² These indicators have been selected from the 50 TSG indicators on the basis of the possibility to calculate them for the EU Member States via existing statistics.

T-MONA is an innovative guest monitoring system and was launched in 2004. This system is a joint project of ANTO, the Ministry, the Austrian Federal Economic Chamber, all nine federal tourism marketing organisations, and many regions. T-MONA is a web-based management information system gathering information on travel behaviour and socio-demographic data, which provides an up-to-date picture of domestic and foreign tourists in Austria. Direct collection of data obtained in surveys is made available for analysis and also permits easy presentation of results in the form of statistical diagrams or tables.

Link: <http://webmark.manova.at/tmona/login>

Under the patronage of HOTREC – Hotels, Restaurants & Café in Europe, the hotels associations of Austria, Czech Republic, Germany, Hungary, Netherlands, Sweden and Switzerland have created the Hotelstars Union. The comprehensive criteria list could help to achieve more data on social and environmental issues (e.g. data on number of establishments having bedrooms accessible for persons with reduced mobility). In the meantime, the following additional countries joined the star family: Estonia (2011), Latvia (2011), Lithuania (2011), Malta (2012) and Belgium (2013).

Link: <http://www.hotelstars.eu/en/>;

Contact in Austria: Austrian Professional Hotel Association, Link: www.hotelsterne.at

7. COMPLEMENTARY ADDITIONAL INFORMATION

If necessary use the following box to provide additional complementary information that has not already been covered.

Vienna, April 2013

APPENDIX

PRINCIPLES FOR THE SUSTAINABILITY OF TOURISM:

- **Taking a holistic and integrated approach**

All the various impacts of tourism should be taken into account in its planning and development. Furthermore, tourism should be well balanced and integrated with a whole range of activities that affect society and the environment.

- **Planning for the long term**

Sustainable development is about taking care of the needs of future generations as well as our own. Long term planning requires the ability to sustain actions over time.

- **Achieving an appropriate pace and rhythm of development**

The level, pace and shape of development should reflect and respect the character, resources and needs of host communities and destinations.

- **Involving all stakeholders**

A sustainable approach requires widespread and committed participation in decision making and practical implementation by all those implicated in the outcome.

- **Using best available knowledge**

Policies and actions should be informed by the latest and best knowledge available. Information on tourism trends and impacts, and skills and experience, should be shared across Europe.

- **Minimising and managing risk – the precautionary principle**

Where there is uncertainty about outcomes, there should be full evaluation and preventative action should be taken to avoid damage to the environment or society.

- **Reflecting impacts in costs – user and polluter pays**

Prices should reflect the real costs to society of consumption and production activities. This has implications not simply for pollution but for charging for the use of facilities that have significant management costs attached to them.

- **Setting and respecting limits, where appropriate**

The carrying capacity of individual sites and wider areas should be recognised, with a readiness and ability to limit, where and when appropriate, the amount of tourism development and volume of tourist flows.

- **Undertaking continuous monitoring**

Sustainability is all about understanding impacts and being alert to them all the time, so that the necessary changes and improvements can be made.

LIST OF INDICATORS (these indicators will be calculated by EUROSTAT)

The following list of indicators was presented to the June 2008 TSG meeting by EUROSTAT.

Please note that the list of indicators as presented below is not yet final (some indicators may still be dropped).

- 1a** Annual number of nights spent at collective accommodation establishments, broken down by region (NUTS2)
- 1b** Monthly number of nights spent at collective accommodation establishments
- national level
- 3a** Number of collective accommodation establishments, broken down by region (NUTS3) and by type of establishment (Hotels and similar establishments ; Other collective accommodation establishments (total) ; Tourist campsites ; Holiday dwellings ; Other collective accommodation not elsewhere specified)
– annual data
- 3b** Number of bedplaces in collective accommodation establishments, broken down by region (NUTS3) and by type of establishment (Hotels and similar establishments ; Other collective accommodation establishments (total) ; Tourist campsites ; Holiday dwellings ; Other collective accommodation not elsewhere specified)
– annual data
- 4a** Monthly gross occupancy rate of bedplaces in hotels and similar establishments
- national level
- 4b** Monthly net occupancy rate of bedplaces in hotels and similar establishments
- national level

- 5a** Total turnover [or year-on-year growth rate] of selected tourism-related industries, broken down by industry (total horeca ; hotels, camping sites, other provision of short-stay accommodation) and by employment size class (1 employee ; between 2 and 9 ; between 10 and 19 ; between 20 and 49 ; between 50 and 249 ; 250 employees or more)
– annual data, national level
- 5b** Total turnover [or year-on-year growth rate] of selected tourism-related industries, broken down by industry (Hotels and restaurants ; Hotels, camping sites, other provision of short-stay accommodation ; Restaurants, bars, canteens and catering ; Activities of travel agencies and tour operators, tourist assistance activities not elsewhere classified)
– annual data, national level)
- 6a** Tourism receipts from inbound tourism ('travel item' from the Balance of Payments)
– annual data, national level
- 6b** Ratio tourism receipts from inbound tourism in relation to tourism expenditure on outbound tourism
– annual data, national level
- 6c** Tourist expenditure by residents on holiday trips with at least one overnight stay, broken down by destination (total ; domestic trips ; outbound trips within the EU ; outbound trips outside the EU)
– annual data, national level
- 8a** Variation of the ratio monthly gross versus net occupancy rate of bedplaces in hotels and similar establishments
– national level
- 9a** Ratio of net [or gross] occupancy rate of bedplaces in hotels and similar establishments between the busiest and the least busy month
– national level
- 10a** Number of bedplaces at collective accommodation establishments per 1000 (local) inhabitants, broken down by region (NUTS3)
– annual data
- 11a** Number of nights spent at collective accommodation establishments per 1000 (local) inhabitants [or in comparison to local inhabitants nights, i.e. number of inhabitants x 365], broken down by country of origin (residents ; non-residents) and by region (NUTS2)
– annual data
- 11b** Number of arrivals at collective accommodation establishments per 1000 (local) inhabitants, broken down by country of origin (residents ; non-residents) and by region (NUTS2)
– annual data
- 11c** Monthly number of nights spent at collective accommodation establishments per 1000 (local) inhabitants [or in comparison to local inhabitants nights, i.e. number of inhabitants x number of days in the month], broken down by country of origin (residents ; non-residents)
– national level
- 11d** Monthly number of arrivals at collective accommodation establishments per 1000 (local) inhabitants, broken down by country of origin (residents ; non-residents)
– national level
- 12a** Average length of stay at collective accommodation establishments, broken down by country of origin (residents ; non-residents) and by region (NUTS2)
– annual data

- 12b** Number of holiday trips of 4 nights or more by EU residents, broken down by length of stay (From 4 to 7 nights ; From 8 to 14 nights ; From 15 to 28 nights ; From 29 to 91 nights ; From 92 to 365 nights) and by destination (domestic ; outbound)
– annual data, national level (country of residence of the tourist)
- 12c** Number of tourism trips with overnight stays by EU residents, broken down by length of stay (1 to 3 nights ; 4 nights or more), by destination (domestic ; outbound) and by purpose of the trip (holidays ; business)
- quarterly data, national level (country of residence of the tourist)
- 14a** Number of tourism trips of 4 nights or more by EU residents, broken down by main means of accommodation used (air ; sea ; land (total) ; railway ; bus, coach ; private and hired vehicles ; other) and by destination (domestic ; outbound)
– annual data, national level (country of residence of the tourist)
- 16a** Number of persons employed in [or share in total employment of] the tourist accommodation sector, broken down by type of contract (fulltime ; parttime ; permanent ; temporary), by age group, by gender, by educational level, by average seniority of work with the same employer
- quarterly data, national level
- 17a** Ratio of the number of persons employed in the tourist accommodation sector in the peak season (quarter) compared to the lowest season (quarter)
- national level
- 18a** Ratio of the mean hourly earnings in the horeca sector compared to the total private sector (local units of enterprises with 10 or more employees), broken down by gender, age, employment contract, educational level, length of service with the enterprise
- 4-yearly data, national level
- 18b** Ratio of the mean hourly labour cost in the horeca sector compared to the total private sector (local units of enterprises with 10 or more employees), broken down by region (NUTS1)
- 4-yearly data
- 45 a** Share of households that can't afford one week annual holiday away from home
- annual data, national level (country of residence of the household)