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Economic importance of tourism varies from region to region; three federal provinces are above the Austrian average in 2018

Vienna, 2021-11-11 – In 2018, the direct and indirect gross value added of tourism (including business trips) in the federal states ranged between €0.61 bn in Burgenland and €5.91 bn in Tyrol. This is the result of the regional tourism satellite accounts (RTSA) compiled for the first time by Statistics Austria and the Austria Institute of Economic Research (WIFO) for eight of Austria's nine federal states. The direct and indirect contributions to the respective gross regional product (GRP) were, thus, between 2.6% in Upper Austria and 16.9% in Tyrol. Accordingly, the share of total regional employment attributable to tourism varies between 3.2% (Upper Austria) and 16.3% (Tyrol). As the RTSA results for 2018 show, more was spent by non-resident than by resident guests in Tyrol, Salzburg and Vienna. In Burgenland, Lower and Upper Austria, the spending of resident guests exceeded that of non-resident guests, in Carinthia the ratio was rather balanced.

The main regions of tourism consumption are in Tyrol, Vienna and Salzburg

In Austria €35.78 bn were spent on holiday and business trips by resident and non-resident same-day visitors and overnight tourists, of which around three-fifths (59.1% or €21.15 bn) were spent in Tyrol, Vienna and Salzburg. The three federal provinces with the highest number of overnight stays record tourist expenditure of €8.33 bn (Tyrol), €7.18 bn (Vienna) and €5.64 bn (Salzburg). While Carinthia has more overnight stays than Burgenland and Styria, total tourism consumption in Styria is €3.49 bn, in Carinthia €2.51 bn and in Burgenland €1.01 bn. In Lower Austria and Upper Austria, tourism consumption by resident and non-resident guests amounts to €2.87 bn and €2.76 bn, respectively.

In four federal provinces, more than half of the tourism consumption is generated by resident guests

In Austria, a total of 43.5% of total tourism consumption was made by resident same-day visitors and overnight tourists (including spending in Austria for trips abroad).

The analysis by federal provinces shows that in Burgenland (78.3%), in Styria (64.7%) as well as in Lower and Upper Austria (62.5% and 62.0%, respectively) significantly more than half of the tourism consumption is generated by resident tourists (see Table 1).

In Burgenland a third of the tourism consumption comes from same-day visitors

The tourism consumption of same-day visitors accounts for €7.38 bn or one fifth (20.6%) of the total Austria-wide consumption in tourism. Burgenland is well above the Austrian average with a same-day visitor consumption share of 33.6%, followed by Lower and Upper Austria with 27.8% and 25.3%, respectively. With 16.9% Tyrol has the lowest share.

In Vienna, Lower and Upper Austria, an above-average amount is spent on passenger transport

An analysis of the consumption structure according to the goods and services consumed shows that in Carinthia (54.1%), Salzburg (53.3%) and Tyrol (57.5%) more than half of the total tourism consumption is spent on accommodation (excl. expenses for second homes) and restaurants, while the share in other federal provinces is between 37.7% (Vienna) and 49.7% (Burgenland; also corresponds to the Austrian average). In Vienna (27.9%) and in Lower and Upper Austria (23.6% and 24.1%, respectively), an above-average amount compared to Austria overall (18.9%) is spent on passenger transport (see Table 2).

The share of tourism in the gross regional product varies significantly between the federal provinces

Overall, tourism in Tyrol, Salzburg and Vienna, the federal provinces with the highest volume of tourism consumption, generates direct and indirect added value effects amounting to €5.91 bn, €3.93 bn and €4.71 bn, respectively. Due to the respective branch structures of these regions, the contribution to the gross regional product (GRP) is very different: 16.9% in Tyrol, 13.7% in Salzburg and 4.8% in Vienna. In Carinthia, Burgenland and Styria, total value-added effects triggered by tourism consumption are amounting to €1.69 bn, €0.61 bn and €2.26 bn, which corresponds to a GRP contribution of 8.0% (Carinthia), 6.8% (Burgenland) and 4.6% (Styria). In Upper and Lower Austria, tourism contributes €1.70 bn and €1.83 bn, directly and indirectly, which is 2.6% and 3.0% to the respective – primarily production-oriented – regional economy (see Table 3).

Share of full-time jobs attributable to tourism is between 3.2% and 16.3%

In 2018, between 7 600 jobs in Burgenland and 57 600 full-time equivalents in Tyrol were directly and indirectly attributable to tourism in the eight federal states. In terms of total regional employment, tourism in Tyrol (16.3%), Salzburg (13.6%) and Carinthia (8.6%) is above average (Austria average 7.9%). The federal capital of Vienna, on the other hand, has a tourism employment share of 5.4% and is thus similar to Styria (5.3%). While the tourism employment share in Burgenland is 6.9%, in Lower Austria and Upper Austria the share accounts for 3.6% and 3.2% of total regional employment (see Table 3).

Further information on the tourism satellite account (TSA) and fact sheets on the individual federal provinces can be found on the Statistics Austria website under "[Tourism satellite account](#)" and on the [WIFO website](#).

Methodological information:

The Tourism Satellite Account (TSA) has been implemented **since the reporting year 2000** in a joint project by **Statistics Austria** (STAT) and the Austrian Institute for Economic Research Institute (**WIFO**) on behalf of the Federal Ministry for Agriculture, Regions and Tourism (BMLRT). With the TSA the interrelation of the tourism industry with other economic sectors and the dimension of the tourist consumption expenditure of resident and non-resident guests in Austria can be made clear.

The TSA is based on the **methodological principles recommended by UNWTO, OECD and Eurostat** (Tourism Satellite Account: Recommended Methodological Framework 2008; TSA: RMF2008); this largely ensures the international comparability of the calculations on the economic importance of tourism in the countries.

Conventional tourism statistics, mostly "accommodation statistics" collecting overnight stays in commercial and private accommodation establishments, cannot or only partially show the diversity and multi-disciplinarity of "tourism", as only a few aspects of tourism are recorded. - The "tourist" occurs only partially and is not integrated as a statistical reference value, since the full range of tourist behaviour - e.g. same-day trips or visiting relatives or friends - is not considered and only the physical, but not the monetary aspect is considered. On the supply side, the situation with regard to tourism is rather the same, since the statistical basis is more extensive, but the components (e.g. accommodation and catering) cannot or only partially be combined to show overall tourism based on tourism statistical data (e.g. overnight stays and turnover).

Due to the inadequate statistical data collection related to tourism, model-like approaches that go beyond traditional statistics can provide information about overall tourism. A comprehensive statistical recording of the phenomenon "tourism" can only be achieved via "tourism-economic accounts" or "**satellite systems**" to the "**National Accounts**" (NA), therefore, which represent tourism in all its dimensions on the basis of NA-related accounts trying to integrate the tourist supply side with the demand side (or vice versa). Accordingly, the TSA represents a macroeconomic and not a microeconomic model, and the TSA results are providing global and benchmark figures which do not allow or only a limited analysis on a small-scale level.

The compilation of "TSA for Austria and federal provinces" requires a large number of **data sources**. In principle, data from Statistics Austria and external institutions (or a combination of both) are used; in addition, administrative data and, if necessary, individual information (e.g. annual business reports) are used. The available sources are often different related to terms and definitions as well as the underlying unit concept. These are either transformed in such a way that they can be used immediately for the TSA calculations or serve as the basis for estimates and assumptions, respectively, on which they are based.

Starting with the reporting year 2000, **Statistics Austria** and the **WIFO** developed a TSA for Austria. For some time now, both institutes have also been compiling **Regional TSAs** (RTSA) for some Austrian Länder (Burgenland, Lower Austria, Upper Austria and Vienna); starting with the reference year 2018, RTSAs are now being drawn up for eight Austrian Länder, which allows for the first time the development of a nationwide consistent tourism satellite system considering in addition the national TSA for Austria.

With regard to the **work to be carried out**, STAT is responsible for the creation of the base satellite and the TSA standard tables in accordance with TSA:RMF 2008, whereby this only includes the direct effects (added value and employment). - WIFO provides estimates regarding the indirect effects of tourism (value added and employment), estimates for the current year and the following year (in addition and if necessary, the direct and indirect effects of the leisure industry are estimated).

Further information on the methodology can be found in the "Standard-Dokumentation zum Tourismus-Satellitenkonto für Österreich" (in German only).

Table 1: Tourism consumption 2018 by federal states and by resident and non-resident guests

| Federal states | Resident guests | Non-resident guests | Second homes | Total |
|----------------|-----------------|---------------------|--------------|--------------|
| | Share in % | | | |
| Burgenland | 78.3 | 20.9 | 0.9 | 100.0 |
| Carinthia | 49.4 | 49.9 | 0.7 | 100.0 |
| Lower Austria | 62.5 | 35.7 | 1.8 | 100.0 |
| Upper Austria | 62.0 | 36.9 | 1.1 | 100.0 |
| Salzburg | 35.6 | 64.1 | 0.3 | 100.0 |
| Styria | 64.7 | 34.6 | 0.7 | 100.0 |
| Tyrol | 23.4 | 76.4 | 0.2 | 100.0 |
| Vienna | 45.4 | 54.0 | 0.7 | 100.0 |
| Austria | 43.5 | 55.9 | 0.6 | 100.0 |

Source: STATISTICS AUSTRIA. Regional Tourism Satellite Accounts for eight federal provinces. based on "TSA: Recommended Methodological Framework 2008" (UNWTO); WIFO. Rounding errors were not adjusted.

Table 2: Tourism expenditures 2018 by federal states and by products

| Federal states | Accommodation services | Second homes | Food and beverage serving services | Passenger transport services | Travel agencies and other reservation services | Cultural, sports and recreational services | Other consumption products and valuables | Total |
|----------------|------------------------|--------------|------------------------------------|------------------------------|--|--|--|--------------|
| | Share in % | | | | | | | |
| Burgenland | 23.1 | 0.9 | 26.6 | 10.8 | 3.3 | 11.1 | 24.3 | 100.0 |
| Carinthia | 27.8 | 0.7 | 26.3 | 10.8 | 3.3 | 9.1 | 22.0 | 100.0 |
| Lower Austria | 20.0 | 1.8 | 26.7 | 23.6 | 6.8 | 7.7 | 13.5 | 100.0 |
| Upper Austria | 21.1 | 1.1 | 23.6 | 24.1 | 9.9 | 7.4 | 12.9 | 100.0 |
| Salzburg | 30.1 | 0.3 | 23.2 | 13.5 | 2.5 | 11.4 | 18.9 | 100.0 |
| Styria | 25.1 | 0.7 | 23.5 | 18.8 | 4.9 | 9.0 | 17.9 | 100.0 |
| Tyrol | 36.0 | 0.2 | 21.5 | 15.1 | 4.6 | 6.8 | 15.7 | 100.0 |
| Vienna | 17.4 | 0.7 | 20.3 | 27.9 | 11.3 | 12.2 | 10.1 | 100.0 |
| Austria | 26.8 | 0.6 | 22.9 | 18.9 | 6.1 | 9.4 | 15.2 | 100.0 |

Source: STATISTICS AUSTRIA. Regional Tourism Satellite Accounts for eight federal provinces. based on "TSA: Recommended Methodological Framework 2008" (UNWTO); WIFO. Rounding errors were not adjusted.

Table 3: Tourism gross value added and employment 2018 by federal states

| Federal states | Tourism GVA ¹⁾ | | Tourism employment ¹⁾ | |
|----------------|--------------------------------------|---------------------|----------------------------------|---------------------|
| | direct | direct and indirect | direct | direct and indirect |
| | Share of gross regional product in % | | Share of total employment in % | |
| Burgenland | 6.0 | 6.8 | 6.2 | 6.9 |
| Carinthia | 6.8 | 8.0 | 7.4 | 8.6 |
| Lower Austria | 2.4 | 3.0 | 3.1 | 3.6 |
| Upper Austria | 2.0 | 2.6 | 2.7 | 3.2 |
| Salzburg | 11.4 | 13.7 | 11.7 | 13.6 |
| Styria | 3.8 | 4.6 | 4.6 | 5.3 |
| Tyrol | 14.3 | 16.9 | 13.8 | 16.3 |
| Vienna | 3.7 | 4.8 | 4.4 | 5.4 |

| | | | | |
|--|------------|------------|------------|------------|
| Austria | 5.4 | 7.4 | 6.0 | 7.9 |
| Source: STATISTICS AUSTRIA. Regional Tourism Satellite Accounts for eight federal provinces. based on "TSA: Recommended Methodological Framework 2008" (UNWTO); WIFO. – 1) Effect of a state's tourism on the respective state's economy. - Rounding errors were not adjusted. | | | | |

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