



Vision **A**

***Tourism in Austria:
Valuable for Everyone –
365 Days a Year***

The Tourism Strategy for Austria.

Legal notice

Media owner, publisher and editor:

Federal Ministry of Economy, Energy and Tourism,
Stubenring 1, 1010 Vienna

Contact:

tourismusstrategie@bmwet.gv.at

Photos:

BMWET/Holey (page 1), BMWET/Holey (page 2),
Austria Tourism/Markus & Karin Gmeiner (page 3), iStockphoto/amriphoto (page 7),
Austria Tourism/Lisa Eiersebner (page 13), iStockPhoto/ ATH Visions (page 19),
iStockPhoto/Imgorthand (page 25), Wörthersee Tourism/Gert Perauer (page 31),
Austria Tourism/Lukas Nagler (page 39),
Shutterstock/PeopleImages (page 45), BMWET/Dolenc (page 52),
BKA/Brauneis (page 55, 1st from left, 2nd from left), BKA/Gruber (page 55, 3rd from left),
BKA/Brauneis (page 56, 1st from top), BKA/Gruber (page 56, 2nd and 3rd from top),
BKA/Wilde (page 56, 4th from top), BMWET/Böhm (page 58),
BMWET/Pargan (page 59, 1st from left), BMWET/Pelzl (page 59, 2nd from left),
BMWET/Pargan (page 59, 3rd from left), BMWET/Pargan (page 60, 1st row, left),
BMWET/Pelzl (page 60, 1st row, right), BMWET/Haiden (page 60, 2nd row, left),
BMWET/Kolb (page 60, 2nd row, right), BMWET/studiohorst (page 60, 3rd row),
BMWET/Haiden (page 61, 1st from left), BMWET/Kriebel (page 61, 2nd from left),
BMWET/Pargan (page 61, 3rd from left), BMWET/studiohorst (page 62, 1st and 2nd from left),
BMWET/Holey (page 62, 3rd from left), BMWET/Noisternig (pages 63 and 64)

Layout:

Mediacontacta Ges.m.b.H., www.mediacontacta.at

Tourism in Austria: Valuable for Everyone – 365 Days a Year

<i>Foreword by the Federal Minister</i>	<i>1</i>
<i>Foreword by the State Secretary</i>	<i>2</i>
<i>Vision T at a glance</i>	<i>3</i>
<i>Strategic fields of action:</i>	
 <i>Economic Strength & Resilience</i>	<i>7</i>
 <i>Labour market & Skilled workers</i>	<i>13</i>
 <i>Innovation & Digitalisation</i>	<i>19</i>
 <i>Resources & Responsibility</i>	<i>25</i>
 <i>Value added & Participation</i>	<i>31</i>
<i>Implementation & measuring success</i>	<i>39</i>
 <i>Achieving more together</i>	<i>41</i>
 <i>Monitoring & Indicators</i>	<i>45</i>
<i>The path to Vision T</i>	<i>51</i>

Foreword by the Federal Minister



The fact that Austria has so much to offer the world is particularly true for tourism. It is a success story that is not only based on our unique natural and cultural landscapes but is also driven by a diverse range of tourism businesses across the regions. Now more than ever, their economic strength and innovative power are crucial to ensuring that we can fully unlock the potential of resilient tourism for value creation and jobs in Austria.

Tourism policy is therefore an integral part of our economic policy. Just as ambitiously as we promote key industrial technologies for the production sector, we are driving forward the economic, technological and social future of the tourism sector.



With our Vision T, developed through a broad stakeholder process, we have a forward-looking strategy that provides a shared direction and delivers concrete implementation measures. In doing so, we are responding to the dynamism of the tourism sector and strengthening the success factors of Austrian tourism.

I would like to thank everyone involved for their great commitment to Austrian tourism, which is beneficial to the whole country.

Federal Minister

Wolfgang Hattmannsdorfer

Foreword by the State Secretary

Especially in these geopolitically challenging times, we must seize every opportunity to take our future into our own hands.

With Vision T, we have established a sound strategic foundation to make the most of the vast potential of Austrian tourism as a reliable domestic economic driver.



Sustainably preserving of natural and cultural tourism resources is just as crucial as generating greater value added for our tourism businesses. We want to benefit from the economic effects of tourism all year round. However, the widest possible appreciation of its benefits among the population is also central to the future success of our tourism. After all, tourism ultimately concerns us all. It creates sustainable economic value for Austria, it strengthens entire regions and it opens up new career prospects for people.

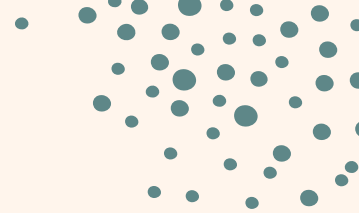
We have also considered this diversity within Austrian tourism through a broad participatory process in the development of Vision T. It is a shared vision for the future, accompanied by a comprehensive action plan and systematic progress monitoring. In this way, we ensure that tourism develops in a direction that aligns with our vision of a valuable, sustainable and successful future.

*Thank you for your support so far
and in the future!*

A handwritten signature in black ink, which appears to read 'E. Zehetner'.

State Secretary

Elisabeth Zehetner



Tourism in Austria: Valuable for Everyone – 365 Days a Year

Today, tourism is a key pillar of our economy and a recognised part of our identity. It secures value creation and jobs for Austria. And it embodies responsibility and sustainability for the future. By 2035, we will successfully realise the full potential of Austrian tourism in line with our values and goals.



- 
- 
- Our tourism sector provides income, jobs and opportunities all year round. The close interconnection along the tourism value chain – from agriculture and culture through to trade and commerce, and on to leisure and mobility services – acts as a key driver of regional development.
 - As a reliable employer, our tourism sector opens up new career prospects, diverse career paths and meaningful fields of work. Austrian hospitality thrives on the quality and motivation of our workforce.
 - Our tourism sector preserves and utilises Austria's unique natural and cultural resources through smart and responsible management. This benefits everyone who lives, works or is on vacation in these regions.



Together, we are ensuring that our tourism sector sustainably strengthens economic, social and environmental values in and for Austria. Our diverse tourism businesses need the best possible and predictable framework conditions to boost competitiveness and value added – with greater entrepreneurial freedom and more scope for innovation. And with greater appreciation for tourism across society, which actively supports it as an economic driver and an enabler of regions worth living in.



Compass of strategic values of Vision T

We are continuing to develop our tourism sector based on clear objectives and values. Creating, appreciating and preserving value are at the heart of Vision T's compass of strategic values. This forms the basis of Austria's tourism strategy 2035 – and makes tourism valuable for everyone.

Creating value

We strengthen the value added of tourism businesses by reducing the burden on companies and promoting investment in quality and innovation. This enables greater productivity, economic strength and resilient business models.



Preserving value

We preserve our tourism resources by promoting sustainable tourism and safeguarding our unique nature and culture for future generations.

Appreciating value

We increase appreciation for tourism and its workforce by engaging the local population and opening up attractive, long-term jobs and career prospects.

By 2035, we are making Austria one of the most sustainable, successful and valuable tourism destinations in the world – and together, we are making the most of the future.

Fields of action

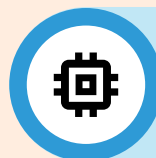
Vision T identifies five strategic fields of action that are crucial for successfully shaping the future of tourism in Austria. For each field of action, it outlines a clear scenario for 2035, highlights key trade-offs and sets strategic priorities as a basis for concrete action plans.



Economic strength & Resilience



Labour market & Skilled workers



Innovation & Digitalisation



Resources & Responsibility



Value added & Participation



The implementation of Vision T is supported and steered by a **monitoring system**. Meaningful indicators make progress and success measurable. This enables us to ensure that we achieve our objectives through the right measures.



Economic strength & Resilience



We are further developing the diversity, quality and innovative strength of our tourism businesses and regions, expanding their economic scope for action and thereby increasing their resilience to crises.





Our vision for 2035

In 2035, Austrian tourism is characterised by attractive diversity: regional nature and cultural experiences are successfully marketed alongside sports and culinary offerings. Destinations stand out thanks to the highest quality standards and leisure activities that are perfectly coordinated. They demonstrate innovative strength in response to new guest expectations. A key focus of development is on extending the seasons.

Tourism businesses benefit from a strengthened equity base and forward-looking investments. Sustainable cost structures, a noticeable reduction in bureaucracy and flexible access to financing solutions increase economic scope for manoeuvre. This means businesses are better prepared for future challenges – from business succession to the effects of geopolitical developments.

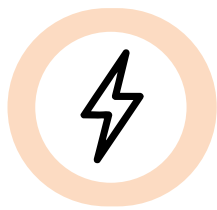
... from the 360-degree tourism analysis

89% *... of the population see tourism as a key part of the Austrian economy.*

93% *... of our guests recognise Austria's potential as a year-round destination.*

58% *... of tourism businesses are confident that they can manage future crises.*

Source: Market Institut 2025



Key trade-offs

Cost pressure ⚡ Pricing power

Tourism businesses face high costs not only for staff, but also for energy and food. At the same time, guests' price sensitivity is increasing. If businesses cannot pass on their own additional costs in full, this often leads to a deterioration in their profitability – even when demand is growing.

From the 360-degree tourism analysis:

90% of tourism businesses perceive inflation and rising costs as a challenge.

Bureaucracy ⚡ Legal protection & security

The tourism sector is characterised by small-scale (family-run) businesses. These are often overwhelmed by the multitude of relevant legal regulations or feel restricted by them in their day-to-day business operations. However, food, labour, operating and property regulations also fulfil important protective functions. Bureaucracy is particularly challenging during business successions.

From the 360-degree tourism analysis:

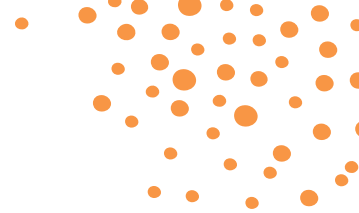
80% of tourism businesses see reducing bureaucracy as a lever for strengthening their resilience to crises.

Year-round operation ⚡ Economic viability

The advantages of a year-round tourism offering are undisputed in the sector. Expansion is nevertheless proving challenging, as it requires a coordinated adaptation of accommodation, leisure and infrastructure services. Holistic concepts are needed to ensure economic viability across the entire value chain. Holiday periods, particularly for family holidays, must be taken into account. Due to climate change, potential shifts in demand must also be considered.

From the 360-degree tourism analysis:

84% of tourism businesses cite a stronger year-round focus as a key success factor.



Strategic priorities in the field of economic strength & resilience

We meet future guest expectations.

We analyse international trends to identify rapidly changing guest expectations at an early stage and to align our tourism offerings with future demand. In doing so, we focus on the diversity and individual needs of our guests. Expectations regarding tourism experiences, different travel budgets as well as preferred communication and booking channels are considered by tailor-made offers with a clear profile. We enable seamless, personalised travel. We ensure attractive offers for guests who – like us – value sustainability. We also cater to special needs, such as accessibility.

We increase demand outside peak seasons.

A multi-seasonal approach is a key lever for reducing economic dependence on seasonal peaks: we strategically develop this to increase value creation, secure long-term employment and make efficient use of regional infrastructure. We concentrate on diversifying our international source markets in addition to the forward-looking expansion of the range of services available to domestic and international guests. Through targeted marketing, we address attractive guest segments for the shoulder seasons. On top of culinary experiences, we focus particularly on cultural, sports and health offerings, trade fairs and conferences, as well as major events.

***We boost profitability
and provide relief.***

Tourism businesses face high operating costs, particularly due to expenditure on staff, goods and energy. To create the necessary entrepreneurial leeway, there needs to be a significant reduction in cost pressure and a consistent cutting of red tape. Businesses, then, can also invest more effectively in their future viability. Our guests benefit from a healthy competition on quality and price.

***We facilitate
business handovers
and generational
succession.***

Successfully passing on a business sets the course for a company's economic future. Particularly in the small-scale tourism sector, with its high proportion of family-run businesses, handing over the business to the next generation can sometimes present considerable challenges. We ensure that tourism enterprises receive targeted support before, during and after this process. Above all, this requires hands-on advisory services, viable financing solutions and unbureaucratic framework conditions. We foster and strengthen the next generation's enthusiasm for entrepreneurship.

***We encourage
businesses to invest
in the future.***

We create the right framework conditions to enable businesses to continuously invest in the development of their products and thus keep pace with rising guest expectations. Funding of tourism SMEs is a key instrument of the Federal Government for implementing Vision T: among other things, it supports investment in resilience, quality improvements, the preservation of business diversity and business succession. We facilitate access to debt and venture capital and promote the continuous improvement of the equity base of businesses.



Labour market & Skilled workers



***We offer meaningful work,
employment models tailored
to different stages of life and
modern education and training,
so that Austrian high-quality
tourism has the staff it needs
for its distinctive hospitality.***





Our vision for 2035

By 2035, tourism is regarded as a highly attractive working environment. The focus is on personal interaction between staff and guests. Authenticity, flexibility and hospitality are expressions of the highest quality of service. Employees perceive their work as meaningful. At the same time, automation and digitalisation are used strategically to relieve them of routine tasks, enabling them to respond even more individually to guests' needs.

The combination of interpersonal skills and technological competence also shapes vocational training in tourism. It is dynamically adapted to practical requirements. As a result, graduates are ideally equipped for their careers and are in high demand both internationally and across sectors.

Austria also succeeds in the long term in attracting tourism workers to the sector through positive working conditions. Employment models tailored to different life stages open up new career prospects for the younger generation, people with care responsibilities and older workers.

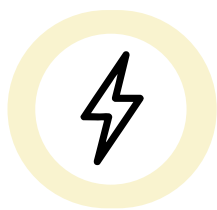
... from the 360-degree tourism analysis

Interaction with people, variety and international job opportunities are the main reasons for working in tourism.

92% ***... of tourism employees would like to see a more positive image of tourism professions.***

79% ***... of tourism employees believe that Austrian tourism offers exciting career prospects.***

Source: Market Institut 2025



Key trade-offs

National demographics ⚡ **Economic profitability**

The demand for labour in Austria is rising because tourism is a growth industry. The strategic focus on quality requires a higher level of staffing. Austrian tourism professionals are also highly sought after internationally. The rising demand in the country cannot be met exclusively by domestic jobseekers, particularly during peak seasons.

From the 360-degree tourism analysis:

94% of tourism businesses consider targeted measures to tackle the labour shortage in Austria important.

Structural improvements ⚡ **Emotionally charged negative examples**

Tourism offers many meaningful fields of work. Its working conditions have improved structurally over the past decades. The fact that it is often described as an unattractive working environment is also due to reports that young tourism employees in particular are confronted with inappropriate behaviour from guests and supervisors. On the one hand, this negative image causes frustration among those employees who actually enjoy their work. On the other hand, it makes it difficult even for leading companies to recruit skilled staff.

From the 360-degree tourism analysis:

66% of the population see the changing image of tourism professions as a current challenge for the industry.

Career orientation ⚡ **Life-stage orientation**

Tourism staff usually work when their family and friends are spending their free time. Although they find their work meaningful, their motivations and priorities can shift over time. The desire for structured free time often becomes more important after starting a family, for example. Individual lifestyles and personal life planning lead to a wide range of expectations regarding tourism jobs: These range from quick earnings in a short time, through stable, long-term full- and part-time positions, to supplementary income of older people.

From the 360-degree tourism analysis::

93% of tourism businesses cite the creation of attractive employment models as a key success factor.



Strategic priorities in the field of labour market & skilled workers

We ensure attractive working conditions for every stage of life.

Tourism employment is a demand-oriented market. Satisfied employees also convey their qualities in a particularly authentic way. More than ever, the sector must prove itself as an attractive employer. Central to this attractiveness are employment models suited to different stages of life, with predictable free time and flexible working hours. Tourism employees need to be treated with respect – both by management and by guests. Young people's entry into a career in tourism must provide positive experiences.

We enhance personal hospitality through smart technology.

We view tourism as a service in which personal hospitality and service quality go hand in hand. We support this specifically through digitalisation, automation and artificial intelligence. These technologies relieve staff of routine tasks and increase the efficiency of operational processes. Tourism employees gain more time and flexibility to respond even more effectively to the individual needs and expectations of their guests.

We offer vocational training with a wide range of career prospects.

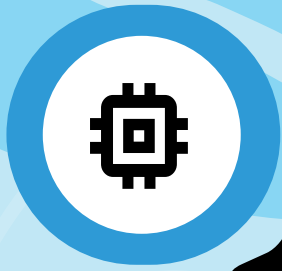
We ensure that Austrian tourism education and training continue to enjoy a high reputation both nationally and internationally. It is highly practical and thus forward-looking. In close collaboration with educational institutions and industry, we develop new qualification profiles that combine social skills with technological expertise. We inspire tourism graduates with diverse and attractive development prospects for a career in tourism in Austria.

We focus on modular training programmes.

Tourism is an industry that is also attractive to people changing career paths or returning to work. This also applies to those in marginal employment and to temporary staff. To fully utilise the workforce's potential and facilitate steady integration into the sector, we focus on modular training programmes, including those designed to be undertaken alongside work. These support the flexible and rapid acquisition of job-specific skills. We also promote intercultural skills.

We promote the cross-regional placement of job seekers.

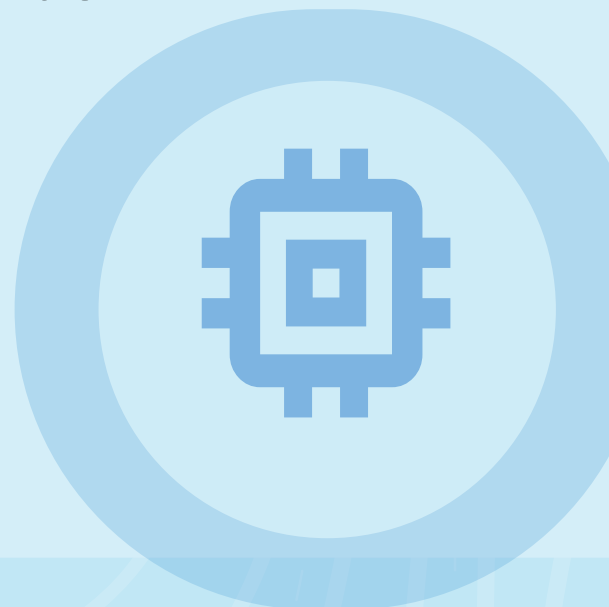
The shortage of local labour becomes particularly apparent during seasonal peaks in many tourism regions. That is why we accelerate, reduce bureaucracy for and support the placement of jobseekers from all federal states, the EU and third countries to our tourism regions. Flexible employment opportunities for seasonal and skilled workers from abroad ensure that international competitiveness and value creation in Austria are not undermined by staff shortages.



Innovation & Digitalisation



We are driving forward product development, future technologies and digitalisation to enhance the quality of the guest experience, the efficiency of operational processes and the appeal of the tourism sector as a place to work.





Our vision for 2035

By 2035, Austrian tourism is regarded as a pioneer in innovative future trends. It consistently identifies and realises optimisation potential throughout the entire tourism value chain.

This ranges from agricultural production and resource management to highly personalised offerings tailored to the needs of future guests. Innovative progress is achieved both through the application of new technologies and through the further development of business models, supply side concepts, forms of cooperation and routine organisational processes.

The innovative strength of tourism in Austria is based on the sector's competence to use digital tools and artificial intelligence as well as to connect national expertise. Structured data is readily available while ensuring high quality, data sovereignty and reliable data protection. By better using the wealth of tourism data, productivity is increased noticeably.

... from the 360-degree tourism analysis

69%

... of tourism employees expect artificial intelligence to be significant for the sector in the future.

54%

... of tourism employees see the potential of artificial intelligence in optimising routine processes.

10%

... of tourism businesses fear that artificial intelligence brings more risks than opportunities.

Source: Market Institut 2025



Key trade-offs

Authentic encounters ⚡ **Efficient workflows**

Automation and digitalisation enable more efficient workflows and increase productivity. However, it is the personal interaction between guests and tourism staff that defines memorable experiences. In a world characterised by advancing technology, interpersonal contact must be preserved as a meaningful element of that experience.

From the 360-degree tourism analysis:

28% of tourism employees expect AI to be used to improve service quality.

Analogue focus ⚡ **Digital potential**

The use of artificial intelligence and other digital applications pose a particular challenge for small-scale service sectors such as tourism: they must implement digital solutions in an operational environment focused on an analogue guest experience. Barriers for adopting digital solutions often include the perceived lack of benefits, missing digital skills and time constraints.

From the 360-degree tourism analysis:

59% of tourism businesses see a need to prepare for the use of artificial intelligence.

Data usage ⚡ **Data security**

The use of guest and business data holds enormous economic potential. At the same time, guests, employees and businesses are becoming increasingly sensitive about how data is handled. Trust and acceptance of digital applications are based on data protection, data security, transparent data usage and a high degree of data sovereignty. This applies in particular to foreign service providers with significant market power.

From the 360-degree tourism analysis:

77% of tourism businesses currently find digitalisation (e.g. booking, online reviews) challenging.



Strategic priorities in the field of innovation & digitalisation

We foster a spirit of innovation and networking.

We see future technologies as an opportunity to further strengthen Austria as a tourism destination. By fostering an active culture of learning and experimentation, we shape mindsets, processes and organisations that are fit for the future. We promote networking within the industry, both amongst its members and with start-ups, technology providers and research bodies. Austria Tourism, the national tourist organisation, acts as a central innovation hub, identifying trends at an early stage, testing use cases and sharing know-how.

We empower people to use new technologies.

We support the industry in recognising and harnessing innovation potential. We are driving the transfer of skills within tourism businesses, destinations and vocational training. New qualification profiles combine technological skills with tourism service qualities. In this way, we increase the acceptance of new technologies. Thereby we ensure that they are perceived and utilised as tools for better guest experiences, more efficient processes and more attractive working environments. We are systematically reducing entry barriers for small-scale businesses whilst simultaneously raising awareness of cybersecurity and resilience.

We ensure our digital capabilities through data.

Through interconnected data spaces, we provide destinations and businesses with low-threshold access to up-to-date, high-quality tourism data. We promote a cooperative approach, clear governance structures and uniform (interface) standards. Our aim is to ensure international interoperability, leverage economies of scale and minimise platform dependencies. Seamless digital service chains for guests allow us to integrate every step of the process: from inspiration and information to booking, payment, mobility, accessing services, the stay itself and post-processing.

We roll out AI applications on a broad scale.

We create the ideal strategic framework for the use of artificial intelligence, in particular through data availability, interoperable standards and Generative Engine Optimisation (GEO) to ensure efficient AI-generated responses to guest enquiries. We provide guidance to help destinations and businesses identify new opportunities and utilise them successfully, responsibly and strategically. We take into account the different requirements for AI solutions for guests, tourism businesses, employees and destinations.

We commit to digital sovereignty and fair rules.

Active dialogue on legal and ethical issues, data protection as well as clear guidelines build trust and confidence in dealing with future technologies. We ensure a high degree of data sovereignty and fair competition when dealing with large foreign online service providers. Legally defined sandboxes for small-scale businesses enable them to test innovative concepts and prepare for their successful implementation.



Resources & Responsibility



We are committed to forward-thinking and responsible management of our resources to preserve our natural and cultural treasures for the benefit of the regions and tourism in the long run, while also making the most of economic opportunities.





Our vision for 2035

In 2035, Austria fascinates its visitors with the beauty of its ecologically intact natural and cultural landscapes, as well as its unique cultural heritage. The distinctive holiday experience in Austria ranges from the Alps and alpine pastures to forests, nature parks and lakes, as well as living traditions, historic sites and a diverse music and theatre culture.

Preserving natural and cultural treasures for future generations is a shared objective that unites visitors and locals in tourism regions. Proactive measures to conserve limited resources and adapt to climate change are widely accepted: sustainable mobility solutions, deliberate visitor flow management, efficient energy and land management, regional supply chains, responsible food use and smart waste management.

Tourism businesses make targeted use of the economic potential of smart resource management to reduce costs, attract new guest segments and strengthen their own resilience.

... from the 360-degree tourism analysis

87% *... of the population emphasise the importance of landscape conservation in tourism.*

84% *... of our guests highlight the beauty of Austria's natural landscape.*

81% *... of tourism businesses currently view climate change as a challenge.*

Source: Market Institut 2025



Key trade-offs

Ecology ⚡ Economy

Rapid growth and established tourism practices (e.g. daily room cleaning, round-the-clock wellness facilities, international cuisine) have created resource-intensive products. At the same time, high-cost pressures and investment barriers make it difficult to implement ecological measures, that are not sufficiently recognised as an opportunity for business optimisation.

From the 360-degree tourism analysis:

86% of tourism businesses consider energy-saving measures to be a key aspect of sustainability.

Pressure for change ⚡ Implementation overload

Guests and society expect the tourism sector to play a pioneering role in matters of sustainability. Climate change, limited resources and uncertain supply chains are increasing the pressure to transform. For the fragmented tourism industry, identifying and prioritising effective measures is particularly challenging. Sustainability certifications offer guidance but are often perceived as a bureaucratic and financial burden.

From the 360-degree tourism analysis:

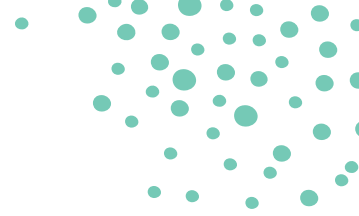
73% of guests and 63% of the population say tourism has a role to play in sustainability and climate protection.

Private transport ⚡ Public transport

Congestion caused by traffic in and around tourism destinations has a strong impact on the environment and the local population. A major contributing factor is the high volume of private transport, which is often perceived by both visitors and locals as cheaper, more convenient and more flexible. Public transport services are often not tailored to tourism and leisure needs. There are hardly any innovative solutions (e.g. microtransit) that are designed holistically and provide answers to local mobility needs – from school transport and commuting to work also for tourism employees to the ‘last mile’ for our guests.

From the 360-degree tourism analysis:

65% of locals in tourism regions perceive traffic as a nuisance.



Strategic priorities in the field of resources & responsibility

We preserve our natural and cultural treasures.

The protection and care of our unspoilt nature and our cultural heritage are key prerequisites for the preservation of our habitats and for our positioning as one of the world's most sustainable tourism destinations. We ensure protected areas and define clear rules for the cooperative use of sensitive areas by locals and visitors. We focus on solutions that involve the local population, the tourism industry, agriculture, conservation organisations and other relevant stakeholders. We pay particular attention to our Alpine infrastructure.

We actively manage adaptation to climate change.

Temperature changes and weather fluctuations present new challenges for Austrian tourism. We are therefore committed to a proactive approach to climate change and the green transition: the need for adaptation is identified at an early stage so that the entire tourism value chain can be developed to be fit for the future. Our tourism sector takes a proactive lead in reducing greenhouse gas emissions, expanding renewable energy sources and preserving biodiversity. It uses energy, food, water and other limited resources efficiently.

We focus on managing visitor flows.

Short-term peaks in visitor numbers place a strain on nature and sensitive cultural sites. Overcrowding and long waiting times are annoying for both visitors and the local population. To smooth out spatial and temporal peaks in visitor numbers, we develop tools for the proactive management of visitor flows. Digitalisation ensures real-time information and optimal control. Limiting capacity can also be a tool to preserve sensitive areas.

We develop holistic mobility solutions.

We specifically reduce the impact of private tourist transport by driving the development of sustainable and innovative mobility solutions. In addition to expanding public transport services, we focus on easy access to travel information and user-friendly booking of public transport. When developing holistic mobility concepts, we ensure conscious networking across regional and national borders. We take into account changes in mobility and travel behaviour, as well as the needs of visitors and the local population.

We view resource management as an economic opportunity.

Tourism should be able to make the best possible use of the diverse synergies between responsible entrepreneurship and economic success. We reduce costs through efficient resource management and smart waste management. We enhance our resilience to crises through regional supply chains and renewable energy sources. We support the sector in communicating its own achievements, thereby successfully appealing to sustainability-conscious guests and skilled workers. We further develop recognised sustainability certifications to provide guidance for the industry and for guests.



Value added & Participation



We bring the value added of tourism to life for people and regions while ensuring local participation, so that sustainable solutions can be found for all, even when interests differ.





Our vision for 2035

By 2035, tourism is widely valued by society. It improves the quality of life across entire regions. In rural areas, tourism acts not only as an economic driver and provider of attractive jobs, but also as a force that brings communities together. It stands for respectful human interaction, quality and successful cooperation. It promotes community projects, such as the well-coordinated development of regional infrastructure, mobility and leisure facilities.

When implementing tourism projects, the needs of the local population are taken fully into account. Careful management of nature and cultural assets is ensured. Potential undesirable developments – such as ‘unbalanced tourism’ or traffic congestion – are addressed at an early stage. We rely on open and fact-based communication, as well as on opportunities for participation, to enable joint solutions even where interests differ.

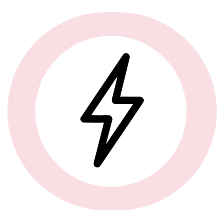
... from the 360-degree tourism analysis

83% *... of the population say that tourism is important for Austria's reputation abroad.*

88% *... of locals in tourism regions believe that tourism strengthens the regional infrastructure.*

6% *... of locals in tourism regions perceive the effects of tourism as predominantly negative.*

Source: Market Institut 2025



Key trade-offs

A place to experience ⚡ A place to live

Visitors long for unspoilt nature and the chance to participate in regional cultural activities. This can lead to conflicts with the local population, for example on land used for agriculture and forestry or around cultural attractions in urban areas. A balance between areas for experiences and living spaces ensures that tourism is compatible with the everyday lives of the local population.

From the 360-degree tourism analysis:

81% of locals in tourism regions consider measures to combat overcrowding caused by high visitor numbers to be important.

Economic success ⚡ Price increases

Austrian tourism excels in quality, which requires a high level of staff and resource input. International guests are often willing to pay the corresponding prices. This boosts value creation in and for Austria. However, passing on (increased) costs also sparks discussions among domestic guests about the affordability of holidays in Austria and about trends in tourism prices.

From the 360-degree tourism analysis:

80% of locals in tourism regions are noticing rising prices.

Business diversity ⚡ Pressure to improve efficiency

Increasing competitive and cost pressure is forcing enterprises to optimise their business models. Leading businesses focus on specialisation, innovation and the expansion of value chains. It is more difficult for small and medium-sized enterprises to make their own cost structures more efficient. Yet, these authentic, family-run businesses are essential for Austria as a tourism destination. They shape its distinctive character, revitalise regional value chains and are firmly rooted in local community life.

From the 360-degree tourism analysis:

49% of tourism businesses cite specialisation of their offering as a lever for increasing their resilience to crises.



Strategic priorities in the field of value added & participation

We position tourism as a driving force for entire regions and communities.

Tourism is not an isolated sector of the economy, but is firmly anchored in the local economic fabric as a driver of regional value creation. It shapes employment, infrastructure and leisure opportunities and supports the productivity of related economic sectors. We position tourism as a regional catalyst that can drive positive development and bring together diverse interests. To this end, we increasingly focus on dialogue formats.

We bring the value added of tourism to life for local residents.

Tourism is only sustainably successful if it safeguards high-quality living environments for the local population. That is why we continuously measure and analyse its attitude towards tourism. We use these insights to defuse potential conflicts at an early stage. At the same time, we communicate the diverse economic and social contributions of tourism through clear examples of good practice, credible advocates and meaningful indicators, thereby fostering greater understanding and acceptance by the local population.

We shape tourism together with the next generation.

Young people are particularly affected by future decisions on tourism policy – as future visitors, employees and as locals. That is why we ensure that their perspectives are taken into account. To this end, we establish new participatory formats and support informed decision-making. Alongside this, we provide young people with low-threshold and affordable access to school sports weeks and a wide range of tourist leisure activities.

We are committed to diversity – among businesses, regions and guests.

Our tourism ecosystems are characterised by diversity. That is why we consciously preserve our distinctive business structure – from small-scale family-run businesses to leading regional enterprises. At the same time, we harness the potential of our tourism regions by optimally tailoring diverse cultural, leisure and sports offerings to local conditions. We communicate our strengths with confidence, enabling tourism businesses and destinations to develop clear profiles with high recognition value. We successfully target diverse guest segments even outside the peak seasons and consistently drive the diversification of our international source markets

We pool the strengths of the tourism ecosystem.

Effective tourism policy relies on coordination and networking to avoid duplication and to pool the strengths of the federal system. That is why we are systematically expanding cooperation between the federal government, the federal states, destinations, the tourism industry and academia. Where necessary, we further develop the shared understanding of roles. We actively promote the exchange of experience at European and international level. The focus is on forward-looking knowledge management: we ensure that expertise is built up with foresight, documented in a way that is easy to use and shared across the entire tourism ecosystem.

> 600

Alpine huts

> 100

Conference, exhibition &
event centres

760

Campsites

We are all tourism



230,000

Employees in accommodation and
food service activities

Festivals

23,500

Hotels and commercial
holiday flats and homes



Boat hire

40,000

Private accommodation
providers

Railway stations
and train stations

8,000

'Farm Holidays'
establishments



Theatres and
opera houses

40,000

Restaurants

> 800

Leisure and wildlife parks

Outdoor, natural and indoor
swimming pools

7,200

Apprentices in the tourism &
leisure industry

UNESCO World
Heritage Sites

1,500

Austrian Guides

Nightlife

Palaces and castles

26

Tourism schools

53

Nature & national parks

> 2,500

Cable cars and ski lifts

6

Commercial airports

*... and
many more*

800

Museums

1,150

Bus companies

39

Thermal spas

> 700

Ski schools

750

Sports shops in
tourism regions

> 13,000

Volunteer mountain rescuers &
mountain rescue services

25,000

Leisure, sports &
entertainment businesses

2,400

Travel agencies

*Trails and
cycle paths*

Gardens

*Churches and
chapels*

Golf courses

Top sights

Coffee houses

Shipping companies

*Shops and
shopping centres*

Cinemas

Hiking trails



Implementation & measuring success

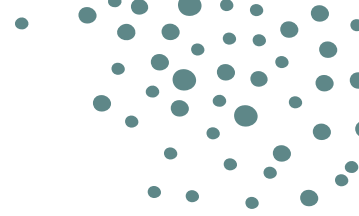




Our mission

We implement Vision T together with all those who actively shape the future of tourism. Clear scenarios, active networking and transparent monitoring create targeted impulses.





Achieving more together

Austria's tourism does not run on its own. Our success as a tourism destination is the result of day-to-day collaborative work – in areas for guests, in kitchens and back offices, in cultural, leisure and health facilities and travel agencies, as well as in agricultural, commercial, retail and transportation businesses. Tourism is a complex interplay of many stakeholders, which thrives on cooperation and coordination. Particularly within Austria's federal tourism system, it is crucial for success to pool efforts and optimally deploy resources.

***Vision T reaches out to everyone
who is actively shaping the
future of tourism in Austria.***





As a result of a collaborative participatory process, Vision T reaches out to everyone who is actively shaping the future of tourism in Austria and who wishes to work together for achieving the strategy's future scenarios: entrepreneurs, employees, the local population, interest groups as well as decision-makers at national, federal state, destination and municipal levels.



Vision T provides a sound framework for this endeavour: it clarifies objectives and directions for development – thereby facilitating coordination between the federal government, the federal states and regions.



Vision T combines economic policy and regional development. Through its scenarios, it highlights how tourism is affected by cross-sectoral future developments – from labour and tax law to mobility and digitalisation. By doing so, it ensures that tourism development perspectives feed into national and international decision-making processes.

Vision T thus creates a shared understanding of the future and responsibility for a tourism development that achieves more together – and therefore generates greater value for Austria.



The role of the Federal Government

Federal policy plays a particularly important role in tourism where coordinated solutions are required at the national level. With Vision T, developed through a nationwide participatory process, the Federal Ministry of Economy, Energy and Tourism sets out a long-term future scenario and key strategic priorities for the sector. It provides reliable guidance, increases planning and investment certainty as well as strengthens the coherence of measures across the entire tourism ecosystem.

The federal government assumes an active role in shaping and steering the implementation of Vision T:



Catalyst

Targeted communication and analysis of key future trends support cooperation and innovation throughout the entire tourism value chain.



Enabler

The federal government supports the tourism industry with expert knowledge and financial resources in its future-oriented product development.



Facilitator

Active national and international networking promotes a holistic perspective on future issues and a comprehensive exchange of experiences.

Key pillars of national tourism policy

In addition to the Federal Ministry's targeted tourism policy activities, two institutions act as key instruments for national tourism policy:



Austria Tourism is the national tourism organisation. It positions the brand 'Holidays in Austria' in more than 30 international source markets. In addition to communication, Austria Tourism acts as a knowledge hub to promote cooperation and innovation within the industry.



The **Austrian Bank for Tourism Development** (OeHT) is the implementing partner for national funding of tourism SMEs. Targeted funding incentives support the development of future-oriented tourism products and services. The OeHT leverages an annual investment volume of over EUR 500 million.



Action plan:

Ongoing action plans complement Vision T by setting out specific measures in line with the target scenarios and strategic fields of action. This allows for a dynamic response to new challenges and developments in tourism.



Monitoring of Vision

For several years, Austria has been analysing tourism development using a comprehensive indicator system to provide a robust basis for decision-making. For this purpose, economic, socio-cultural and environmental indicators are collected. This system continuously evolves as part of Vision T. In addition to improving data quality and expanding the indicator set, nine core indicators have been identified. These indicators support Vision T's compass of strategic values by linking it to specific targets.



Creating Value

- 1 Real value added through tourism
- 2 International travel receipts
- 3 Equity ratio of high-quality hotels

Appreciating Value

- 4 Tourism acceptance score (TAS)
- 5 Year-round employees in accommodation and gastronomy
- 6 Guest satisfaction

Preserving Value

- 7 Share of overnights in off-season
- 8 Number of Austrian Ecolabels for tourism businesses
- 9 CO₂-emissions in accommodation and gastronomy



Creating Value



1

Real tourism value added

Based on 2015 prices, real direct and indirect tourism valued added amounted to around EUR 22.6 billion in 2025. Our target for 2035 is an increase of at least 10% – and thus real tourism value added of over EUR 25 billion. We aim for stable, sustainable growth that focuses on quality rather than quantity.

*Our target for 2035:
> EUR 25 billion*

Increasing real tourism value added by at least 10% to over EUR 25 billion

2

International travel receipts

In 2025, international travel receipts – expenditure by foreign visitors in Austria excluding passenger transport – amounted to just under EUR 26 billion in nominal terms. We aim to increase this figure by EUR 1 billion annually and exceed EUR 36 billion by 2035. This will be achieved by primarily intensifying efforts to target established source markets and by continuous diversification.

*Our target for 2035:
> EUR 36 billion*

Increasing international travel receipts by more than EUR 10 billion in nominal terms to over EUR 36 billion

3

Equity ratio of high-quality hotels

The equity ratio is an indicator of the financial flexibility of a business and thus also of its resilience to crises. At under 18%, the equity ratio of innovation-driven and investment-oriented high-quality hotels – a benchmark for the entire industry – is currently low compared to other industries. We aim at exceeding the 20% mark by 2035.

*Our target for 2035:
> 20%*

Increasing the equity ratio of high-quality hotels to over 20%

Appreciating Value



4

Tourism acceptance score (TAS)

For sustainable success, it is important that the people living in the country recognise the opportunities presented by tourism, particularly in the context of rising visitor numbers. The term 'tourism acceptance' describes the local population's attitude towards tourism. In 2025, the TAS between positive and negative opinions on tourism stood at around +37 percentage points. However, this comparatively high level of approval is offset by growing scepticism. Our goal by 2035 is to improve the TAS to +40 percentage points.

*Our target for 2035:
+40 percentage points*

Increasing the tourism acceptance score to +40 percentage points

5

Year-round employees in accommodation and gastronomy

The stable foundation of the tourism industry is formed by people employed year-round in accommodation and gastronomy businesses. In 2025, the sector had around 134,600 year-round employees. Our goal is to increase this figure to over 160,000 by 2035.

*Our target for 2035:
> 160,000 people*

More than 160,000 year-round employees in tourism

6

Guest satisfaction

Guest satisfaction is a meaningful indicator of the quality and competitiveness of our tourism products and services. In 2025, Austria received an average score of 1.6 from its guests (with 1 being the highest and 6 the lowest). The aim is to increase this encouragingly high level of guest satisfaction even further by 2035.

*Our target for 2035:
Score of 1.5*

Improving the guest rating score for holidays in Austria to 1.5



Preserving Value

7

Share of overnights in off-season

A more balanced distribution of overnights throughout the year reflects progress in reducing seasonal demand peaks. In 2025, 53.5% of overnights were recorded outside the four peak months of January, February, July and August. The target is to increase this share to over 60% by 2035.

Our target for 2035:
> 60 %

Increasing the share of overnights during the off-season to over 60%

8

Number of Austrian Ecolabels for tourism businesses

Tourism businesses in Austria share a high level of environmental and social responsibility. By 2025, 814 tourism, gastronomy and cultural businesses had been awarded the independent Austrian Ecolabel. Our target is to have 1,500 certified businesses by 2035.

Our target for 2035:
1,500 certified businesses

1,500 tourism businesses with Austrian Ecolabel

9

CO₂-emissions in accommodation and gastronomy

Model calculations of greenhouse gas emissions from the accommodation and gastronomy sectors demonstrate the effectiveness of reduction measures in core tourism areas. In recent years, emissions have fallen to approximately 310,000 tonnes of CO₂ equivalents. Our aim is to achieve a further reduction of more than 100,000 tonnes by 2035

Our target for 2035:
< 200,000 tonnes

Reducing greenhouse gas emissions by more than 100,000 tonnes



Creating Value

Indicator	1 - Real tourism value added	2 - International travel receipts	3 - Equity ratio of high-quality hotels
Target 2035	> EUR 25 billion	> EUR 36 billion	> 20%
Methodology	Real tourism value added is calculated using the Tourism Satellite Accounts (TSA) methodology, with 2015 serving as the base year for inflation-adjusted analysis. (Source: Statistics Austria, Austrian Institute of Economic Research/ WIFO)	International travel receipts are calculated using the travel balance methodology, which compares the nominal expenditure of foreign visitors in Austria with that of Austrians abroad. (Source: Statistics Austria, Austrian National Bank/OeNB)	The equity ratio is recorded as a median value and calculated in accordance with the Austrian Corporate Reorganisation Act (URG). It is based on balance sheet data for 3-, 4- and 5-star establishments, which are collected as part of the federal tourism funding programme. (Source: Austrian Bank for Tourism Development/OeHT)



Appreciating Value

Indicator	4 - Tourism acceptance score	5 - Year-round employees in accommodation and gastronomy	6 - Guest satisfaction score
Target 2035	+40 percentage points	> 160,000 people	Score 1.5
Methodology	Since 2024, the Austrian population's attitude towards tourism has been surveyed via a quarterly questionnaire, in which 13,000 people provide a rating on a five-point scale. (Source: Statistics Austria)	The number of people employed in the tourism sector for at least 300 days a year is determined by analysing anonymised social security data. (Source: Austrian Institute of Economic Research/ WIFO)	Since 2017, guest satisfaction has been surveyed as part of the T-MONA online survey, in which around 40,000 people take part each year. This is rolled out in close cooperation with tourism organisations, associations and other key stakeholders. (Source: Austria Tourism/NTO)



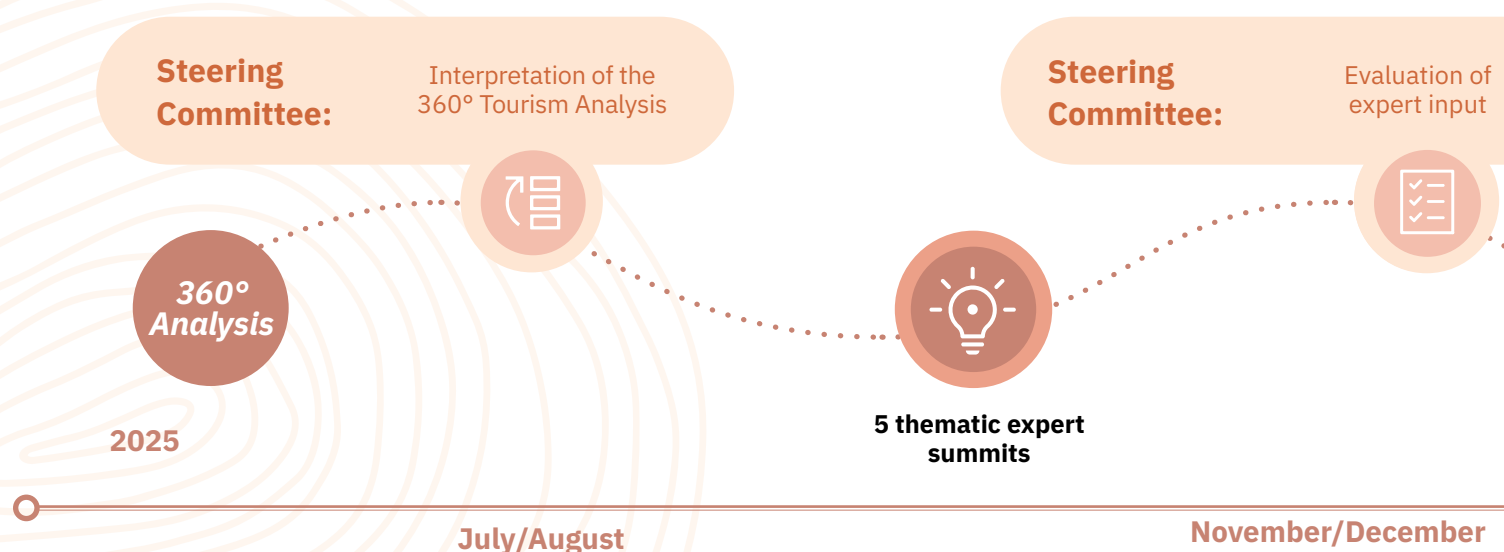
Preserving Value

Indicator	7 - Share of overnights in off-season	8 - Number of Austrian Ecolabels for tourism businesses	9 - CO ₂ -emissions in accommodation and gastronomy
Target for 2035	> 60%	1,500 certified businesses	< 200,000 tonnes
Methodology	Total overnights and the share of the low season are determined in accordance with the methodology of the Tourism Statistics Regulation. (Source: Statistics Austria)	Austrian Ecolabels are awarded by the Ministry responsible for the Environment following a successful certification process. The figures include businesses covered by Directive UZ 200 (tourism, gastronomy and cultural establishments). (Source: Ministry/ BMLUK)	The calculation is based on environmental economic accounts, which are derived from national environmental and economic statistics. (Source: Eurostat)

The path to Vision T

The development of Vision T was guided by extensive engagement with tourism stakeholders and supported by extensive expert knowledge.

The process started with the 360-degree tourism analysis. Building on these insights, five expert summits were held in autumn 2025, generating valuable strategic input and bringing together perspectives from industry, academia, regional stakeholders and societal trends. The findings from both the analysis and the expert summits were subsequently consolidated into an initial set of strategic scenarios. As part of a nationwide tour across all federal states, these initial strategic objectives were reviewed and refined in close collaboration with the stakeholders who drive tourism value creation on a daily basis. These stakeholder dialogues made a significant contribution to further developing the content and informing the final review of Vision T. Throughout the process, a steering committee provided ongoing guidance and strategic oversight, serving as a central body for reflection and direction.



Steering Committee: In-depth reflection

A five-member steering committee supported the strategy process as central body for reflection and guidance.

The steering committee brought together a wide range of perspectives and expertise. It reviewed interim results, addressed potential trade-offs and explored possible development pathways. This ensured that strategic decisions were informed by a broad, well-founded and sufficiently differentiated range of viewpoints.



Members of the Steering Committee:

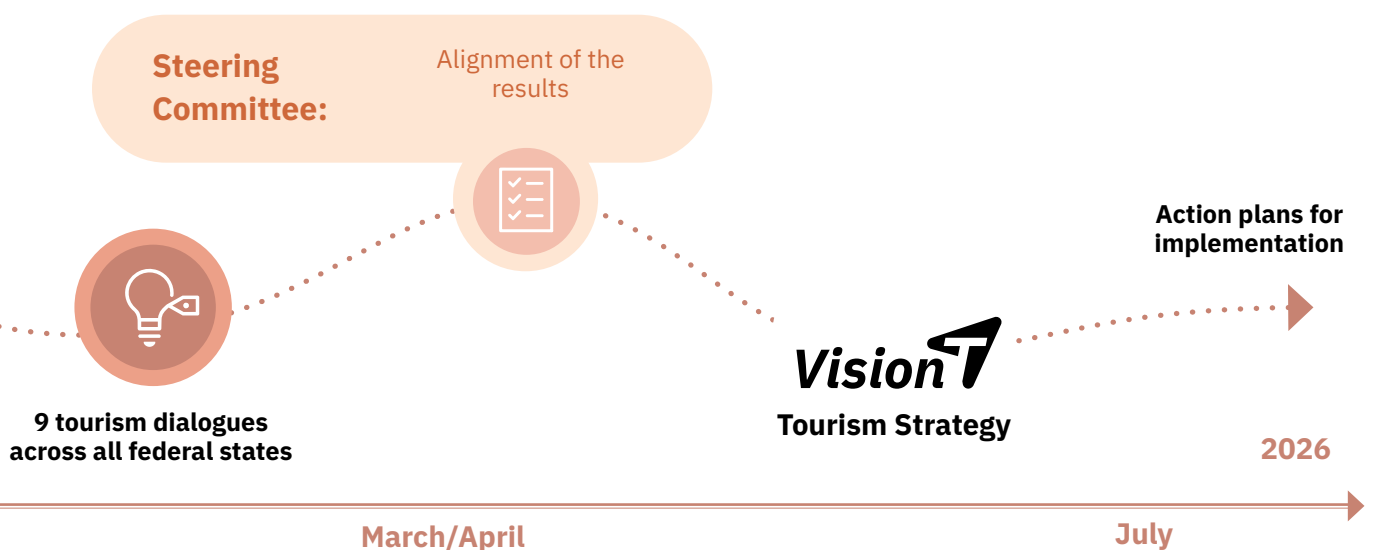
Elisabeth Zehetner
State Secretary for Energy, Startups and Tourism

Susanne Kraus-Winkler
Chair of the Federal Division for Tourism and Leisure
Industries, Austrian Federal Economic Chamber

Prof. Harald Pechlaner
University of Eichstätt-Ingolstadt

Prof. Roman Egger
SmartVisions and Modul University Vienna

Ulrike Rauch-Keschmann
Director General for Tourism, Federal Ministry of Economy,
Energy and Tourism





360-degree tourism analysis: broad participation

The 360-degree tourism analysis in the summer of 2025 marked the launch of the strategy process for Vision T: Under the guiding principle ‘tourism matters to all of us’, more than 4,200 people shared their perspectives on the future of tourism in Austria.

The aim of this wide-ranging opinion poll was to gather the most diverse possible range of views and perceptions regarding tourism development in Austria, thereby creating a sound basis for the subsequent strategy process. In addition to a representative telephone survey, a freely accessible online tool was used. In this way, absolutely everyone with an interest in tourism was able to get involved in the strategy process – from tourism businesses and employees to guests and local residents in and around tourism regions.



Structure of respondents

4,235 respondents

(non-overlapping)

Representative sample of the Austrian population aged 16 and over

Representative population

Tourism businesses

Tourism employees

Guests

Residents in tourism regions

Other businesses in tourism regions

Survey method

***Online and telephone
interviews***

Survey period

***30 June to
9 September 2025***



A summary of the key findings and the full version of the study are available on the Ministry's (BMWET) website (in German).

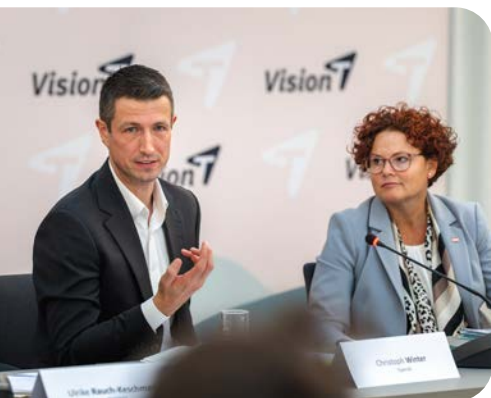
<https://www.bmwet.gv.at/Themen/Tourismus/vision-t.html#umfrage>



Expert summits: strategic impulses

Building on the results of the 360-degree tourism analysis and the findings of the steering committee, five events were held, each bringing together around 20 experts from the tourism sector as well as specialists from other relevant fields and industries.

These expert summits provided valuable strategic input and enabled the integration of perspectives from the industry, academia, the regions and societal trends. On this basis, the five fields of action of Vision T were refined and further specified.





The expert summits followed a standardised methodological concept:

- Keynote presentations from academia and practitioners initially set the thematic framework.
- A moderated plenary dialogue with the State Secretary brought different perspectives and contrasting views into the process.
- Working in rotating small groups, the participants explored key strategic themes in depth, guided by structured questions for each field of action.
- The consolidated findings were subsequently discussed in a plenary session and prepared as robust strategic input for the next steps in the process.



Here you can find pictures from the expert summits:





Topics and dates of the expert summits

3 November 2025

Value added through tourism: Opening remarks by Prof. Gabriel Felbermayr, Director of the Austrian Institute of Economic Research (WIFO), and Prof. Harald Pechlaner, University of Eichstätt-Ingolstadt

13 November 2025

Environmental sustainability: Opening remarks by Cordula Wohlmuther, Regional Director for Europe, UN Tourism, and Marijke Janz, Manager for Climate Change and Sustainability Services, EY denkstatt

17 November 2025

Innovation & digitalisation: Opening remarks by Prof. Roman Egger, SmartVisions and Modul University Vienna, and Christoph Winter, OpenAI

2 December 2025

Economic resilience: Opening remarks by Gregor Hoch, Hoch-Consulting and Hotel Sonnenburg, and Wolfgang Schwarzbauer, ECO Austria

18 December 2025

Labour market & skilled workers: Opening remarks by Prof. Holger Bonin, Director of IHS, and Sabine Platzer-Werlberger, Head of Austrian Public Employment Service in Tyrol

Exchange with academia and research: reliable evidence

To ensure the targeted use of scientific evidence in the strategic development of tourism in Austria, the State Secretary convened leading representatives from academia and tourism research for an exchange event held on 23 March 2026.

Discussions focused on potential formats for strengthening networking, on the targeted dissemination of research findings and insights as well as on emerging topics expected to gain increasing relevance for Austria as a tourism destination in the future.





Stakeholder dialogues: comprehensive practical check

The findings from the 360-degree tourism analysis and the expert summits were consolidated into initial strategic scenarios and subsequently subjected to a practical check in collaboration with those who create tourism value on a daily basis.

A total of 420 participants from the industry, the regions, associations and public administration took part in this phase of the process. They assessed the developed guidelines and fields of action in terms of their practical applicability and prioritisation. This practical assessment provides an essential basis for ensuring that the strategy is broadly anchored within the tourism ecosystem.







Stakeholder dialogues

9 March 2026 **Graz**

10 March 2026 **Klagenfurt**

11 March 2026 **Linz**

18 March 2026 **Salzburg**

19 March 2026 **Innsbruck**

20 March 2026 **Dornbirn**

7 April 2026 **Eisenstadt**

9 April 2026 **Vienna**

13 April 2026 **St. Pölten**



Here you can find pictures of
the stakeholder dialogues:





Like the expert summits, the stakeholder dialogues followed a standardised methodological concept:

- Each event began with a presentation of the interim strategic results by the State Secretary for Tourism.
- This was followed by an assessment of the fields of action and strategic scenarios using a traffic light system to provide a quick and meaningful reality check.
- In small groups, concrete implementation approaches, including their expected impacts and necessary prerequisites, were developed and prioritised for the five fields of action.
- In a fishbowl discussion with the State Secretary for Tourism, relevant aspects were explored in greater depth through open dialogue.



Youth summit 'NextGen': embracing the future

The 360-degree tourism analysis indicated that young people in Austria are becoming increasingly critical of tourism. Against this backdrop, the State Secretary for Tourism hosted the 'NextGen' youth summit on 14 April 2026, bringing together 30 young people aged between 16 and 23.

Using interactive formats, participants worked on identifying key challenges and developing potential solutions. The youth summit also ensured that the perspectives of the next generation — who will play a key role in shaping and supporting tourism in the years and decades ahead — were incorporated into the strategic process. The issues and needs identified were subsequently taken into account in the development of measures.



Here you can find pictures
of the youth summit:





Tourism in Austria: Valuable for Everyone – 365 Days a Year

The Tourism Strategy for Austria.

Vision 

 Federal Ministry
Economy, Energy
and Tourism
Republic of Austria