

A scenic view of a Swiss village, likely Grindelwald, featuring a prominent church with a tall spire, traditional wooden houses, and a lake in the foreground. The background shows majestic mountains under a blue sky. A large, semi-transparent graphic of the letters 'Plan T' is overlaid on the image, with the 'T' being significantly larger than the 'Plan'.

Master Plan
for Tourism

www.bmnt.gv.at/masterplan-tourismus

ON THE WAY TO
THE MOST SUSTAINABLE
TOURISM DESTINATION
IN THE WORLD

**THIS PLAN IS NOT
THE END, BUT THE
STARTING SIGNAL
FOR A NEW QUALITY
OF TOURISM POLICY.**

Austria is one of the most successful tourist destinations in the world. Increasing numbers of guests and overnight stays show that tourism and leisure-time industry in our country have proceeded in the right direction. There are many reasons for the success: Intact natural landscapes, mountains, lakes and natural parks, our towns and cities, the cultural diversity, the Austrian cuisine on the basis of high-quality regional products are as much responsible for the success as well-trained staff members or the hospitality and professionalism of all those working in the field of tourism. All these abilities and characteristics lay the foundation for the success of Austrian tourism. Tourism and leisure-time industry create important jobs in the regions, and are, thus, responsible for welfare and equality of opportunities, including in rural areas.

However, tourism is constantly evolving as well. The needs and expectations of guests have changed – decisions about holidays have become decisions about lifestyle. The world has become smaller and thus competition has become stronger. More and more people have the opportunity to travel.

So far, Austria has coped very well with this change, and has been able to continue on its successful way. With about 45 million arrivals, and almost 150 million overnight stays per year Austria ranks in eleventh place in the global ranking of international arrivals, which is sensational for a country as small as Austria. Tourism and leisure-time industry contribute to about 16 percent of the GDP.

However, this success should not tempt us to rest on our laurels – quite the contrary. Even today, we must take the necessary steps in order to be able to be successful tomorrow. We therefore decided one year ago to elaborate, within the framework of a broad participation process, a strategic basis for the future of Austrian tourism.

The “Plan T”, our Master Plan for Tourism was born. The name has been selected deliberately, because in tourism nothing happens by chance, every success is based on good planning.

The present “Plan T” outlines strategies, ideas and foundations, which can be very valuable for tourism. It has not been developed on the green table on a purely theoretical basis or behind closed doors. Hundreds of people from the tourism and leisure-time industries participated in discussing this plan and working on it for months. The “Plan T” shall be the basis of the Austrian Federal Government’s tourism policy in the course of the next few years. It lays down guidelines for the sustainable further development of destination Austria and shall serve as a guide for political decisions at all levels as well as for the programming of the EU funds for the forthcoming period in Austria. It is important that sustainability in all dimensions determines the future tourism policy. This Master Plan is supplemented by an annual action plan which contains concrete implementation steps and which facilitates rapid response to changes in this dynamic environment.

This plan is therefore not the end but the starting signal for a new quality of tourism policy. If we are working jointly on the future of destination Austria, if we focus our considerations on the people and on our living environments – then we will be on the right way – on the way towards the most sustainable tourism destination in the world!




Elisabeth Köstinger
Federal Minister

for Sustainability and Tourism

WITH PLAN T WE HAVE PAVED THE WAY FOR THE FUTURE OF TOURISM.

The first step to legitimize the content of Plan T was a survey among 600 enterprises of the tourism and leisure-time industries. The encouraging result: 95 percent of the enterprises interviewed judged very positively the status quo of Austrian tourism with the classics such as landscape, nature, hospitality, etc. being on top of the “list of strong points”. Nevertheless, it has become obvious that we need responses to challenges such as digitalisation, reduction of red tape and, in particular, recruitment of skilled workers.

Our growth is sustainable and the quality of our offer is continuously rising. We must strengthen this development and advance it cautiously, without exceeding limits in the course of this process. Because it is all about our 90,000 tourist enterprises, which render, with their almost 300,000 employees, excellent services for our guests day by day, increase the regional value-added, and contribute, in total, 16 percent to the GDP.

What is particularly important is that we will have an instrument in the future to reflect on a regular basis the economic development of our enterprises, and to be thus able to draw conclusions about the necessary measures.

The process behind Plan T, with 500 stakeholders, constructive discussions and the formation of new networks, is far from being concluded. This present paper with the strategy we have worked out is a living document, which will and has to be continuously developed further, in order to be able to shape a successful tourism policy for guests, enterprises, staff members, the people and the environment also in the future.

It was important for us that this strategy is backed by everybody and that we are jointly going along the right path. Everybody should feel: Something is happening which will also help me to advance – from the five-star hotel, the small guesthouse, to the country inn and leisure parks, because they provide the services and they are responsible for the good results.

I would like to seize the opportunity to express my sincere gratitude to Federal Minister Elisabeth Köstinger and to the “Who’s Who” of persons involved in the tourism industry who have taken the time to contribute their experiences, ideas, and visions.

The value of an idea lies in its implementation, and at this point we are all called upon – politicians, representations of interests and entrepreneurs – to ensure that this project is not shelved but consistently further developed in order to enable tourism to be the driving force and a pioneer for the business location, for innovations, and for further development also in the future.

I wish the “success story tourism” that we have paved the way for the future with our “Power PlanT”; and that we will thus be able to maintain and further develop our position as a leading tourist destination.



Petra Nocker-Schwarzenbacher
Chairwoman Division of Tourism and Leisure Industries
Austrian Federal Economic Chamber



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TOURISM IS AN IMPORTANT
DRIVING FORCE OF
REGIONAL DEVELOPMENT
AND COMPETITIVENESS.

EVERY REGION HAS ITS STRENGTHS,
ITS BIG AND SMALL
PARTICULARITIES AND ITS TALENTS.

THE TOURIST OFFER SHALL
DELIBERATELY ENABLE REGIONAL
IDENTITIES AND
AUTHENTIC ENCOUNTERS

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TOURISM LAYS
THE FOUNDATIONS FOR
WELFARE AND QUALITY
OF LIFE IN AUSTRIA

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The economy and society are marked by technological acceleration as well as by cultural changes with increasing dynamism and complexity. Tourism, a mirror image of the society, is subject to these changes as well, maybe even a little bit more. Digitalisation changes tourism from scratch, it alters the procedures at the hotel, holiday planning and booking, business models, but first and foremost it changes our guests. In addition to that they are wooed by more and more tourist destinations. After all the customers are getting – quite rightly – more and more demanding and want to have top quality. For this purpose you need motivated staff and more rapid investment cycles.

The last strategy for tourism already dates back ten years. Therefore, the Federal Government has given tourism a prominent place in the government programme and has incorporated the elaboration of an overall strategy for tourism in it. Within the framework of a broadly-based participation process all over Austria experts were interviewed, intensive discussions took place and were listened to attentively. In the course of this process, we have learned a lot about the challenges of Austrian tourism and have jointly developed this strategy. In this context, one topic has emerged as the guiding principle for the future tourism policy – sustainability. Sustainability in all its manifestations.

SUSTAINABILITY AS A FUNDAMENTAL PRINCIPLE FOR TOURISM

What is meant by “sustainable tourism”? The UN World Tourism Organization (UNWTO) has worked out a clear definition of it, “Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities“.

This must become the basis of Austrian tourism! Only if we take into consideration all three pillars of sustainability will we be successful in the long run. We are thus on the eve of a paradigm shift: The focus of our tourism policy is not only on the visitor any longer, but also on the needs of our entrepreneurs and their staff members, as well as of the local communities and of the environment.

It is not primarily a question of tourist destinations meeting the requirements of our guests, but a question of high-quality living environments where the guests as well as the local people feel fine – be it in a city or in the countryside. But tourism must also take account of its global responsibility and make a contribution to the implementation of the “United Nations Sustainable Development Goals”.





ENTREPRENEURIAL TOP PERFORMANCE

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Only economically sound enterprises are able to meet the high expectations of our guests and to cope successfully with dynamic competition. Entrepreneurs in the tourism industry need room for manoeuvre for investments and innovations as well as fair legal framework conditions. In this respect, the focus of our Master Plan is on our family-run enterprises, to which Austrian tourism is inseparably linked. Family enterprises shall constitute the backbone of the domestic offer also in future and offer the guest authentic and typical experiences of holidays in Austria, not least because it is here where hospitality is lived in a special way. Only economically successful enterprises will be able to recruit and to keep motivated staff members. However, tourism is more than just accommodation and gastronomy. The overall experience of the guest is composed of many encounters on the spot. This starts already with the bus driver, the newspaper vendor, the police officer and the usher at the concert.

TOURIST DESTINATIONS ARE LIVING ENVIRONMENTS

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We must rethink and reconsider the relations between guests and local people. We are all inhabitants of one living environment, our guests only temporarily though.

Only if the local people do not consider the tourists to be a burden can an unforgettable holiday experience be created for the guest. It will therefore be necessary in future to ensure a stronger involvement of the local population and to take care that – to the extent possible – all people in a destination profit from tourism. This paradigm shift means more than just a short-term goal, it is all about a holistic attitude and a new tourism awareness.

A RESPECTFUL WAY OF DEALING WITH NATURE

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Our intact nature as well as our beautiful and diverse landscapes are the main holiday motives for our guests. At the same time, tourism has a significant impact on these resources, from travelling to the holiday destination by car up to the snow cannon. We must keep an eye on this field of tension and find a reasonable reconciliation of interests. It would be the wrong approach to condemn tourism – the positive effects such as regional value-added and jobs, but also the contribution to international understanding and to personal encounters are obvious. Nevertheless, or precisely for this reason, we must deal with our natural resources in a respectful way and counteract wrong developments in time.

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THE GOAL IS
A SUSTAINABLE TOURISM
INVOLVING
ALL ENTERPRISES, EMPLOYEES,
THE LOCAL PEOPLE
AND GUESTS

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This applies in particular to the connection with climate change. This is nothing abstract, it is real and also perceptible and visible in Austria. Even small measures can achieve great success; from energy saving measures at the hotel to initiatives on plastic avoidance. This includes also the careful way of dealing with foodstuffs, as well as their origin and quality. After all, the interconnection between agriculture and tourism will gain in significance.

In future, the guests will want to be informed more precisely about what they are eating and where the products come from. This is an opportunity for Austria's versatile and high-quality offer.

We must pursue far-reaching measures also in future, especially if they seem to be challenging; keyword mobility or CO₂ emissions. If we want to reach the goal to have our CO₂ emissions reduced by 36 percent by 2030, then tourism will also have to make its contribution. But we ourselves, too, as travellers are called upon to question our own behaviour and our travelling decisions.

TOURISM AS ARTISTIC SYNTHESIS

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Tourism is marked by a great number of autonomous partners, whose individual success depends on their interaction. It is not only a question of accommodation, gastronomy or travel agencies, but also a question of culture, ski schools, trade,

leisure-time facilities as well as of agriculture, modes of transport etc. – they all constitute – as a nexus of service providers – the value-added chain of tourism.

Decisive factors for a successful tourist destination are therefore regional cycles and cooperation at all levels and between the sectors. For this purpose a smoothly-functioning labour market, access to sources of financing, to know-how and to technology are needed. Cooperation between Federal Government and Federal Provinces, interest groups and associations, and – as our guests have long since started thinking beyond borders – also trans-boundary cooperation is needed.

Tourism constitutes a complex network, and the better the network, which entails cooperation and binding partnerships as well as processes and procedures, the more satisfied the guests will be and the more successful the value-added chain will be.

We can only implement this Master Plan for Tourism jointly. For this purpose, we need a dialogue on an equal footing. We must turn away from the spirit of competitiveness that we have learned and head towards cooperation in thinking and acting, because it applies especially to tourism: “The whole is more than the sum of its parts.”

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TOURISM AS THE LEADING SECTOR
OF THE 21ST CENTURY CREATES
THE BASIS FOR WELFARE AND
QUALITY OF LIFE
FOR ALL OF AUSTRIA.

THE FOCUS MUST BE ON
THE VALUE-ADDED.

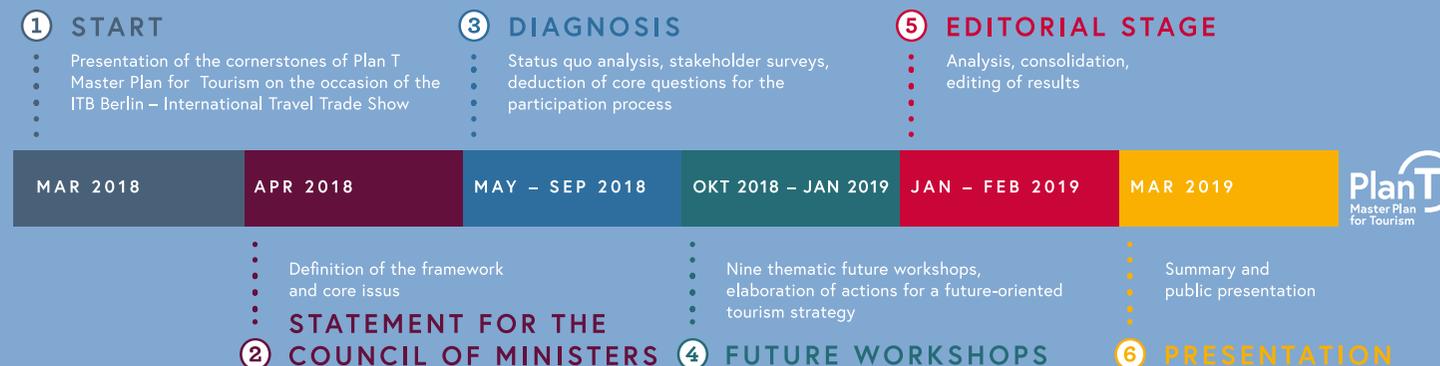
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THE WAY TOWARDS PLAN T – MASTER PLAN FOR TOURISM

The government programme 2017-2022 “Together – For our Austria.“ provides for developing an overall tourism strategy in order to work out impulses and priorities for the next few years, to implement and to evaluate them as well. The work on this “Plan T – Master Plan for Tourism” took place under the motto “A dialogue on an equal footing with the industry”, because not only does a participative process and an extensive exchange with the stakeholders increase the quality of the measures worked out, but it encourages also the joint implementation on a broad basis.

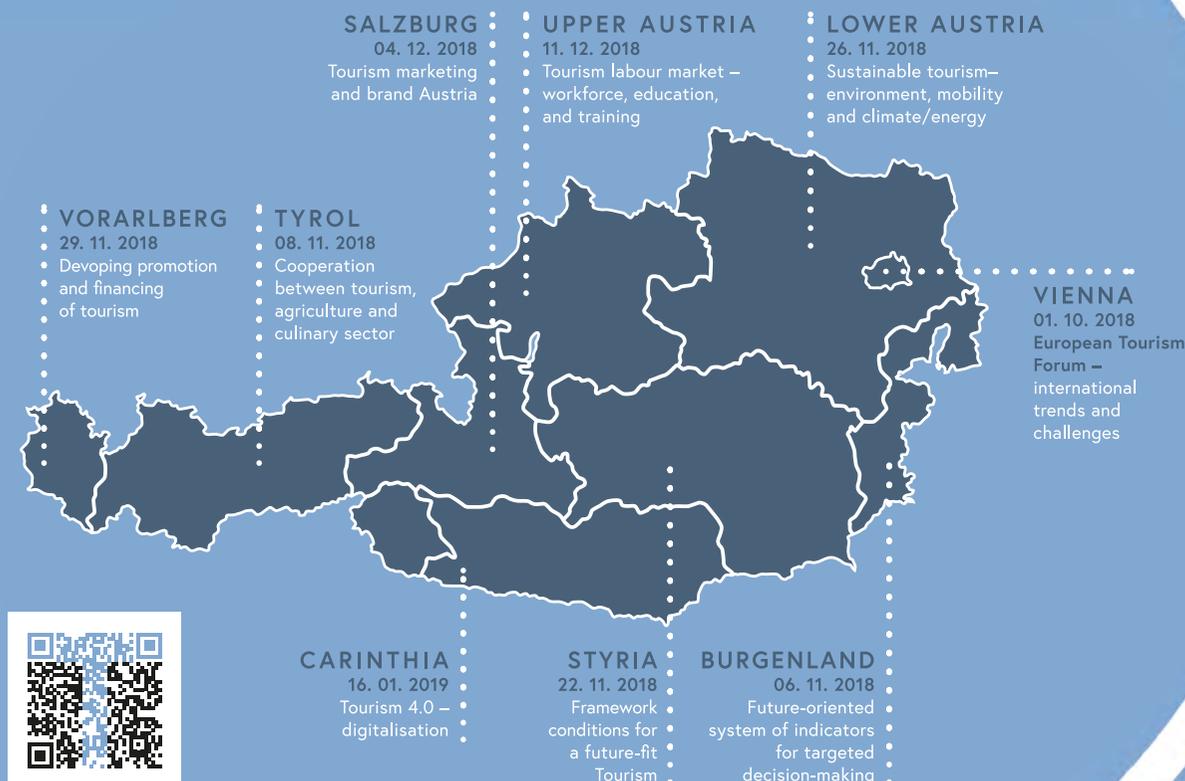
- These guidelines for action should meet the actual requirements of the industry as closely as possible. This was ensured by means of involving all relevant stakeholders – also from neighbouring fields of the economy and the society.
- As a link to the entrepreneurs, the design of the strategy process took place jointly with the Division of Tourism and Leisure Industries of the Austrian Federal Economic Chamber.
- The Federal Provinces, on top the respective officials in charge of tourism, as well as the provincial tourism organisations, the Austrian National Tourism Office (Österreich Werbung), the Austrian Bank for Tourism Development (Österreichische Hotel- und Tourismusbank) and the Austrian Hotelier Association (Österreichische Hotelierversammlung) have been involved in the process as essential partners right from the beginning.

PROCESS IN DETAIL



THE MOST IMPORTANT MILESTONES

- As a basis, a representative survey among 600 member enterprises of the Division of Tourism and Leisure Industries of the Austrian Federal Economic Chamber as well as 30 qualitative stakeholder interviews were carried out for the purpose of exploring the priorities in a targeted way as well as of identifying common needs.
- The core elements of the strategy process were nine dialogue-oriented future workshops all over Austria. Within the framework of these future workshops more than 500 persons involved in this process laid, with their ideas, proposals, measures and learning cases, the foundations for the further development of Austrian tourism.
- Based on this, joint options for solutions and actions to meet challenges in the field of the core issues of tourism policy were elaborated.
- For the purpose of quality assurance, an interdisciplinary Expert Council consisting of renowned personalities accompanies the work on the Master Plan, also to ensure the feasibility and the efficiency of the proposed measures.
- Moreover, the Parliamentary Committee for Tourism of the National Council, in particular the chairperson and the tourism spokespersons were involved in the process of working out the plan.



- The documentation of all future workshops and thus of all contributions of the participants is available on the website of the Federal Ministry for Sustainability and Tourism www.bmnt.gv.at/english/Tourism0/Plan-T---master-plan-for-tourism.html in a transparent way. Even if not all proposals for measures can be implemented (immediately), no idea is lost.



“THIS PARTICIPATIVE PROCESS
FOR DEVELOPING A TOURISM STRATEGY
CONSTITUTES A SHOWCASE FOR ALL OTHER
UNWTO MEMBER STATES“

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ZURAB POLOLIKASHVILI
UNWTO SECRETARY-GENERAL

WITH THE PRESENTATION OF “PLAN T – MASTER PLAN FOR TOURISM“ ON 21 MARCH 2019 THIS PROCESS HAS NOT COME TO AN END. THE PRESENTATION SHOULD RATHER BE A STARTING SIGNAL FOR A NEW QUALITY OF TOURISM POLICY IN AUSTRIA.

The regular intersection between politics and tourism is the most important matter of concern of the Master Plan, because it is the only way of being able to react in this fast-moving age in a flexible way and in time on challenges. The concrete steps of implementation for destination Austria are laid down in an action plan which is to be regularly established and their implementation is being evaluated.

This takes place in close cooperation with the Federal Provinces and the Expert Council. However, this will only lead to sustainable success of destination Austria if all service providers jointly take the necessary steps.

GUIDING OBJECTIVE 1

THINKING TOURISM ANEW

- ① STRENGTHENING THE AWARENESS OF TOURISM
- ② ESTABLISHING A COOPERATION CULTURE
- ③ USING DIGITAL POTENTIAL

GUIDING OBJECTIVE 2

FURTHER DEVELOPING THE LEADING SECTOR OF THE 21ST CENTURY

- ④ DESIGNING AN ATTRACTIVE BUSINESS ENVIRONMENT
- ⑤ MAKING TRAINING AND LABOUR MARKET FIT FOR THE FUTURE
- ⑥ KEEPING OUR LIVELIHOOD SUSTAINABLE

GUIDING OBJECTIVE 3

BUNDLING FORCES

- ⑦ CREATING A REGIONAL VALUE-ADDED FOR EVERYBODY
- ⑧ FURTHER DEVELOPING TOURISM MARKETING
- ⑨ MAKING FINANCING AND PROMOTION MORE FLEXIBLE



1
MASTER PLAN

3
GUIDING OBJECTIVES

9
FIELDS OF ACTION

GUIDING OBJECTIVE 1
THINKING TOURISM ANEW

1

STRENGTHENING THE AWARENESS OF TOURISM

AREAS OF ACTIVITY:

- Communicating the value of tourism and promoting a positive awareness of tourism
- Focussing on the human being
- Strengthening self-confidence and professional identity

Austrian tourism has a very good reputation abroad. However, in some regions it has lost its prestige among the local people. This results in reservations vis-à-vis tourist activities as well as investments and has also effects on the attractiveness of tourism as employer. Therefore, it is important to improve the image of tourism and the awareness for the significance and the achievements of this industry as well as of its professions in a sustainable way.

Tourism makes a valuable contribution to the quality of life of our population, for example in the form of infrastructure, cultural and leisure-time offers or of better short- and long-distance transport facilities. However, most Austrians hardly perceive in everyday life how and in which form they benefit from tourism besides their own holiday activities. It is important to make all groups of society aware of this individual and social benefit – in urban as well as in rural areas. New participation and cooperation models should facilitate communication of the value of tourism and create a culture of togetherness characterised by understanding and support.

Not only within society but also within the tourism industry itself the perception of the value of one's own achievements must be improved. Pride and joy must be part of the professional identity in tourism. Only in this way can the culture of hospitality typical for Austria also be lived in a credible way. All persons employed in the field of tourism make thus an indispensable contribution to the attractiveness of Austria as a holiday destination and to the welfare in our country.

AREAS OF ACTIVITY

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– COMMUNICATING THE VALUE OF TOURISM AND PROMOTING A POSITIVE AWARENESS OF TOURISM

The achievements and the positive effects of tourism shall become more visible and experienceable. The importance of tourism for Austria, but also for each and every individual shall become more clearly recognizable. The goal is to anchor tourism in a positive way in the awareness of the people.

– FOCUSING ON THE HUMAN BEING

The focus must be on the satisfaction of the guests as well as on the satisfaction of the local people. The symbiosis between holiday area and living environment is important and creates the authenticity typical for Austria. However, this should not go as far as to completely subordinate the needs of the local people to the interests of tourism; the local people should recognize the advantageous developments, which are rendered possible by tourism. The goal is a harmonious coexistence of guests and the local people.

– INCREASING SELF-CONFIDENCE AND STRENGTHENING PROFESSIONAL IDENTITY

The value of one's own contribution to the success of destination Austria should be more appreciated again and should make the acting persons proud. The goal is to transfer the positive perception of Austrian tourism by others to a positive self-perception.



GUIDING OBJECTIVE 1
THINKING TOURISM ANEW

2

ESTABLISHING A COOPERATION CULTURE

AREAS OF ACTIVITY:

- Creating a dialogue and establishing new formats
- Initiating cooperations
- Enabling transfer of knowledge and intra-branch learning

Tourism is a complex economic system – a tourism product is composed of a great number of different services. However, in many cases there exists a historically grown competitive spirit in the tourism industry, which is even further promoted by competition in the market economy. There are numerous individual interests and hardly any common goals. However, the needs of the guests, who are getting more and more demanding, require, more than ever before, the networking of service providers.

Especially for the small-scaled tourism industry the bundling of competences and resources and the joint development of products is essential. For this purpose, the readiness for dialogue and cooperation must be intensified. Therefore, it is decisive for economic success to proceed in a coordinated way, to optimize interfaces, and to have a holistic view along the value-added chain.

Cooperation projects create a value-added compared to individual activities. They increase the creative solutions and innovation potential and reduce the individual need for resources. The coordination between partners as well as the handling of coordination projects need appropriate framework conditions. Only in this way can it be ensured that in particular also transnational and cross-border projects do not get stuck in the design and/or experimental stage. At the same time, new cooperation models shall encourage the exchange of know-how and further joint development, thereby promoting committed interdisciplinary cooperation.

AREAS OF ACTIVITY

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– CREATING A DIALOGUE AND ESTABLISHING NEW FORMATS

The regular exchange between Federal Government, Federal Provinces, destinations, enterprises, interest groups, but also with other branches of industry, shall be promoted by means of appropriate framework conditions. For this purpose, the establishment of regular inter-institutional fora is a suitable instrument. The goal is the intensification of cooperation by means of respective platforms and other supporting structures.

– INITIATING COOPERATIONS

Useful cooperations do not always develop automatically, in particular as far as the cooperation with other branches of industry is concerned. Sometimes respective incentives and persuasion are required. Moreover, simple access reduces the inhibition threshold to get actively committed to an idea. The goal is to create incentives for joint initiatives and to make future-fit projects visible.

– ENABLING TRANSFER OF KNOWLEDGE AND INTRA-BRANCH LEARNING

Current information and expert opinions are, in view of the rapid changes, decisive for competitiveness. Also in the field of tourism, life-long learning is indispensable. The goal is to establish innovation platforms, which enable, according to the open source idea, to learn from each other, provide inspiration for new ideas and create networks for like-minded people.



GUIDING OBJECTIVE 1
THINKING TOURISM ANEW

3

**USING DIGITAL
POTENTIAL**

AREAS OF ACTIVITY:

- Supporting the digitalisation of tourist enterprises
 - Creating data alliances
 - Further developing e-government services

Digitalisation presents great challenges and exerts influence on the whole value-added chain of tourism. It influences of course the searching and the booking behaviour of our guests and thus marketing and sales, but it comprises also fields like the labour market, education and training, and operational procedures. The requirements placed in small-scale enterprises and destinations are getting more complex, more individual and much more information-intensive. Modern data management will become decisive for success, developments such as block chain, artificial intelligence and similar technologies are only at their beginning anyway. The sharing economy and the success of the platform economy are particularly relevant early examples of fundamental changes in the tourism industry.

Nevertheless, digitalisation offers, in particular for a highly developed tourist destination such as Austria, great opportunities to increase the productivity and to orient supply and demand in a targeted way. It enables innovations in the range of products of tourism, in services and business models as well as in the efficiency of processes within the value-added chain. However, for this purpose well-trained specialists and the respective infrastructure as well as a clear definition of roles for the various levels of action are needed.

The connection to a high-performance broadband network covering the whole territory becomes a critical factor of success. In order to reduce official procedures and bureaucratic burdens for tourist enterprises the further development of e-government is necessary. Hand in hand with digitalisation, data protection and cyber security are gaining in significance. This requires awareness-raising and support.

AREAS OF ACTIVITY

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– SUPPORTING THE DIGITALISATION OF TOURIST ENTERPRISES

Regarding the digital transformation, enterprises have reached completely different levels of development which requires appropriate support services. The goal is to adapt the support to the respective development level of the individual tourist enterprises and to accompany them into the digital future according to their individual needs.

– CREATING DATA ALLIANCES

Data constitute the basis of success in all fields of tourism – the more data, the more possibilities for synergies and cooperations. A data alliance is thus not a one-off project but grows with the experience gained. The goal is to learn from each other and with each other. This could range from learning on the basis of purely structural data, via smart data approaches, up to anonymized behavioural data.

– FURTHER DEVELOPING E-GOVERNMENT SERVICES

Complex bureaucratic processes tie up (time) resources of the enterprises. Digital solutions are to release capacities for entrepreneurial value-added. The goal is the evaluation of administrative processes in terms of up-to-date and user-friendly service design for the tourism industry and the provision of e-government services.



GUIDING OBJECTIVE 2
FURTHER DEVELOPING THE LEADING
SECTOR OF THE 21ST CENTURY

4

DESIGNING AN ATTRACTIVE BUSINESS ENVIRONMENT

AREAS OF ACTIVITY:

- Simplifying regulations and reducing the tax burden
- Safeguarding opportunities for the next generation
- Enabling fair competition for accommodation providers

Tourist enterprises, which have often grown over generations, are known and appreciated for their family nature. In order to be able to continue to run such enterprises up-to-date framework conditions are required. High quality tourism requires permanent investment activities, for which the enterprises need the necessary room for manoeuvre. Some relief such as the reduction of the value added tax on overnight stays with an annual volume of €120 million has already been achieved and the programme of the Federal Government provides for further necessary steps.

The small-scale tourism industry is particularly affected by the bureaucratic burden. Every additional hour in the office is one hour less with the guest. In order to be able to cope with international competition, requirements and administrative procedures should be reduced to a minimum according to the model of the Ordinance on Licence Exemption (Genehmigungsfreistellungsverordnung) for accommodation enterprises with up to 30 beds.

By 2020 about 2000 hotels in Austria will be waiting to be handed over to a successor. 80 percent of them are family enterprises. In order to safeguard the unique culture of tourism in Austria the respective framework conditions for business successions are needed. However, apart from administrative needs it is also important to enable a smooth transfer from one generation to the next. This calls for an offer of interdisciplinary consulting. From the human-social component, via questions of operational management up to aspects of tax law and social law.

The accommodation sector has changed significantly in the course of the past few years. Apart from the existing traditional accommodation system the number of private room and apartment rentals on international booking platforms is permanently rising. In the same way as commercial tourist enterprises new providers shall also comply with their obligations under tax law.

AREAS OF ACTIVITY

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– SIMPLIFYING REGULATIONS AND REDUCING THE TAX BURDEN

Within the framework of legislation, the concerns of the tourism industry shall be increasingly taken into consideration in order to avoid disadvantages in international competition. The goals are the creation of investment incentives and the simplification of complex regulations.

– SAFEGUARDING OPPORTUNITIES FOR THE NEXT GENERATION

In order to sustainably safeguard the unique culture of tourism in Austria the respective attractive framework conditions for business successions in the family are needed. The goal is to enable successful business successions and start-ups in the tourism industry.

– ENABLING FAIR COMPETITION FOR ALL ACCOMMODATION PROVIDERS

The coexistence of commercial tourism enterprises and private accommodation has worked smoothly for decades. However, platform economy and sharing economy bring about new challenges and distortion of competition. The goal is the creation of a modern regulatory and organisational framework, which guarantees fair competition for this and for all future developments in this direction.



GUIDING OBJECTIVE 2
FURTHER DEVELOPING THE LEADING
SECTOR OF THE 21ST CENTURY

5

MAKING TRAINING AND LABOUR MARKET FIT FOR THE FUTURE

AREAS OF ACTIVITY:

- Optimizing the quality of training
- Organising work in the field of tourism in a better way
- Making a contribution by means of intercorporate measures.

Tourism in Austria is growing and thus also the additional need for staff members. In the two core industries of tourism, the hotel industry and gastronomy, more than 500,000 persons were employed in the course of 2018, on annual average about 275,000. Thus, the number of employed persons has risen by 23 percent since 2010 alone. All over Europe, the search for staff is getting more and more difficult, not least also due to the continuous success of the industry. Moreover, in times of economic boom tourism is in more fierce competition with all other branches of the economy.

Working in the field of tourism differs considerably from working in other industries. The demand for tourism services varies in the course of time – at noon and in the evening, weekend and season. This results in sector-specific challenges, which call for a differentiated consideration of the tourism labour market.

However, many apprenticeship posts in the field of tourism remain vacant. This is in particular due to the demographic change and the competition with about 200 other apprenticeship occupations. Apart from apprenticeship occupations also tourism schools, technical high schools and universities offer high quality education and training. Graduates are, however, often attracted by branches outside the field of tourism, where they are very much demanded due to their multifarious competences. The image of professions in the field of tourism has suffered in the course of the past few years, in spite of the fact that especially tourism offers attractive opportunities for young people, but also for lateral entrants.

AREAS OF ACTIVITY

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– OPTIMIZING THE QUALITY OF TRAINING

Practical relevance, permanent further development and quality assurance of the training are indispensable prerequisites in order to make people enthusiastic about working in the field of tourism. Stronger technical linkages with other branches of the industry and new combinations of competences are necessary. The goal is to create modern and attractive job profiles in the field of tourism and to improve the transition from the educational system to the industry.

– ORGANISING WORK IN THE FIELD OF TOURISM IN A BETTER WAY

It is often not possible to keep staff members in the tourism industry in the long run. In order to achieve that, it is necessary to even better exploit the potential for intercorporate measures to improve the working conditions, for example by means of using modern and/or digital human resources management methods, optimizing duty rosters, up-to-date staff accommodations or targeted staff programmes. The goal is to increase the attractiveness of working in the field of tourism.

– MAKING A CONTRIBUTION BY MEANS OF INTERCORPORATE MEASURES

The tourism industry needs innovative approaches in the field of staff acquisition and recruitment in Austria as well as abroad. In order to increase the share of those who stay in this sector, the reconciliation between work and family life shall, for example, be facilitated. Moreover, feasible models for lateral entrants into the tourism industry are needed. The goal is to exploit the available potential of staff for tourism and to retain the people in this sector.



GUIDING OBJECTIVE 2
FURTHER DEVELOPING THE LEADING
SECTOR OF THE 21ST CENTURY

6

**KEEPING OUR LIVELIHOOD
SUSTAINABLE**

AREAS OF ACTIVITY:

- Establishing Austria’s position as a “green” destination
- Making tourism a “power station”
- Creating structures for sustainable mobility and improving connectivity

Austria stands for sustainable tourism in harmony with man and nature. We have an intact nature as well as a high level of environmental awareness among the population. More and more guests consider sustainability and the active promotion of a climate- and environmentally compatible tourism to be a matter of great concern. On an international scale Austria could be perceived even to a greater extent as a sustainable tourism destination, which will lead after all also to an increase in the attractiveness of holidays in Austria.

Tourism and climate change are closely interlinked. On the one hand, it is an industry, which is and/or will be particularly severely affected by climate change. Consequently the tourist offer must be adapted to the changing framework conditions. On the other hand, tourism contributes to climate change, among other things by means of individual tourist traffic. In order to ensure a sustainable development of tourism, steps must be taken which keep the negative effects on the environment and on the climate as low as possible.

For this purpose an energy system is needed which is sustainable and at the same time safe, innovative, competitive and affordable. It is important to reduce greenhouse gas emissions, to rely increasingly on renewable sources of energy, to increase energy and resource efficiency and to ensure at the same time the competitiveness of destination Austria also in the future. This also requires tourism to play its part. An increased commitment of the tourism industry within the framework of programmes such as the 100,000 roofs photovoltaics and small storage water heaters programme can be a first step.

The main factor responsible for environmental pollution in the field of tourism is traveling to and from the holiday destination. In the interest of the guests, but also of the local people, priority is to be given to the further development of sustainable mobility and transport solutions between and within urban and/or rural regions.

AREAS OF ACTIVITY

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– ESTABLISHING AUSTRIA'S POSITION AS A "GREEN" DESTINATION

Austria's commitment to comprehensive sustainability must be lived in a credible way internally, and must be made clearly visible externally. In particular, sustainable enterprises and regions shall act as shining examples and be identified by awards and voluntary certification systems, such as quality and environmental labels. The goal is to establish sustainability as a unique selling point for Austrian tourism and to encourage destinations and enterprises in their efforts.

– MAKING TOURISM A "POWER STATION"

New technological and legal possibilities to generate, store and supply renewable electricity beyond property borders offer opportunities for tourist enterprises and destinations. The goal is the regionalisation and decentralisation of the supply with renewable electricity.

– CREATING STRUCTURES FOR SUSTAINABLE MOBILITY AND IMPROVING CONNECTIVITY

The improvement of connectivity comprises climate-friendly travel to and from the holiday destination for national and international guests as well as the mobility on the spot – for guests as well as for local people. Synergies between transport systems promote the use and the acceptance of sustainable mobility solutions. The goal is to create better networks of the tourism and transport industries in order to combine shuttle and on-the-spot mobility to an integrative transport system.



GUIDING OBJECTIVE 3
BUNDLING FORCES

7

**CREATING A REGIONAL
VALUE-ADDED FOR EVERYBODY**

AREAS OF ACTIVITY:

- Strengthening regional structures and value-added chains
- Making Austria experienceable as a culinary destination
- Using agriculture and forestry as a factor for adventure and recreation

Tourism and agriculture are closely inter-related, both shape the rural areas in Austria. Increased cooperation offers an enormous potential for both sides; and is expected and requested by Austrian and foreign guests. Also with a view to preserving the cultivated landscape this interface becomes clearly visible; what is needed is a balance between utilisation by tourism and utilisation by agriculture and forestry. Moreover, it is important to simplify, on the basis of the success model “Holidays on the Farm”, intersectorial cooperation, to close existing gaps in the value-added chain and to develop new cooperation approaches. The basis for it is the mutual understanding, which can best be raised within the framework of school education.

Austria is a country with a pronounced dining culture and cuisine. The extraordinary culinary tradition in Austria offers a special opportunity for intensified cooperation between agriculture and tourism. The diversity of meals which are typical of the region and culinary customs on the basis of quality-assured local products constitutes a valuable component of the tourism offer.

In the course of the past few years an increasing awareness for healthy, high-quality and organic products as well as a trend towards a regional cuisine interpreted in a modern way have developed. With their high quality products, the Austrian farmers provide a good basis on which a common innovative tourist product design and positioning can be developed.

AREAS OF ACTIVITY

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– STRENGTHENING REGIONAL STRUCTURES AND VALUE-ADDED CHAINS

An intensified cooperation between agriculture and tourism in the regions consolidates the development of economic areas and living environments. Agricultural and tourism services shall be combined to become new innovative offers. The goal is to win agriculture and forestry as a strategic partner for tourism.

– MAKING AUSTRIA EXPERIENCEABLE AS A CULINARY DESTINATION

Efforts to establish Austria's position as a culinary destination with high-quality regional production must be reinforced – from traditional cuisine to top gastronomy. The goal is to make our guests ambassadors for Austrian products and Austrian cuisine.

– USING AGRICULTURE AND FORESTRY AS FACTOR FOR ADVENTURE AND RECREATION

It is all about understanding nature and the agricultural and forestry services not only as a scenery but increasingly making it also a thematic content and part of the tourist's experience. In this context, importance has to be attached to mutually responsible behaviour in order to ensure that this symbiosis can exist sustainably. As far as the guests are concerned, the understanding of agriculture and food production shall be increased. The goal is the extension of the tourist offer by agricultural services and nature experiences.



GUIDING OBJECTIVE 3
BUNDLING FORCES

8

FURTHER DEVELOPING TOURISM MARKETING

AREAS OF ACTIVITY:

- Rethinking destination management
- Jointly conquering new markets
- Using digitalisation for marketing and product development

The tasks of the publicly financed destination marketing organisations (tourism associations, destinations, provincial tourist organisations, Österreich Werbung (Austrian National Tourist Office)) have changed. Whereas in former times the most important task was to bring guests into the country, the tasks are now going far beyond brand management and communication. Today, the priority is on bundling in the fields of product development, quality assurance and innovation management. In addition to that, there are also new tasks. From employer branding for destinations up to transport concepts, mobility solutions to visitor flow management. After all, it is all about the management of living environments for local people and guests. Destination Marketing Organisations become Destination Management Organisations (DMO).

At product level the differentiation is getting more and more difficult, the importance of trademarks is rising. At the same time, the communication is changing dramatically in the digital age: Providers do not have the sovereignty over communication any longer, the classical sender-receiver model is replaced by digital communities. In many cases the sales is taken over by booking and sharing platforms operating on a global scale. Quick learning has become a decisive factor as well as the rapid implementation of external impulses. Presently there exists no central innovation hub, where networks as well as project-oriented problem solutions are coordinated with digital technologies.

The Austrian National Tourist Office is important for the system of tourism in many respects. It is a competent partner for the industry in its external appearance and as internal network node. However, the permanent changes require an evaluation of the tasks with a view to the best possible benefit for the industry. Within the framework of the existing federal system this will be an important contribution to a successful interaction and to the optimisation of interfaces in the marketing of tourism.

AREAS OF ACTIVITY

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– RETHINKING DESTINATION MANAGEMENT

The efforts of the past few years to understand destinations as trademark systems and to develop respective strategies, establish positions and define priorities are already bearing fruit. The goal is coordination and harmonisation beyond destination borders and synergies, which can be experienced as value-added.

– JOINTLY CONQUERING NEW MARKETS

In order to be able to participate in the flow of tourists from Asia and to exploit market potentials from the CEE area bundled forces and concerted actions are decisive for the purposes of a quality strategy with a strong value-added. In Germany, the most important market of origin, Austria's attractiveness as a holiday destination must be maintained. The goal is a joint procedure to maintain the number of regulars, to win new guests, and to spread at the same time the demand in terms of seasons.

– USING DIGITALISATION FOR MARKETING AND PRODUCT DEVELOPMENT

Innovation platforms can be driving forces for exchange, networking and problem solutions. Digitalisation comprises in this context more than sophisticated internet and social media activities. It ranges from automation of working steps to artificial intelligence. The goal is to seize the opportunities of digitalisation along the whole service chain.



GUIDING OBJECTIVE 3
BUNDLING FORCES

9

**MAKING FINANCING AND
PROMOTION MORE FLEXIBLE**

AREAS OF ACTIVITY:

- Strengthening family-run and owner-managed enterprises as the backbone of Austrian tourism by means of financing and subsidisation mechanisms
- Creating equity mezzanine financing instruments
- Strengthening the Austrian Bank for Tourism Development (ÖHT) as a provider of know-how

About 90 percent of the enterprises in the field of tourism and in the leisure-time industry are small and medium-sized enterprises. As far as the financing of their investments is concerned, they are often confronted with major challenges: Many enterprises have a low equity ratio – not least as a consequence of low carrying amounts – and therefore problems with credit procurement. Framework conditions such as “Basel IV” but also changes in the interest rates will render investments in the field of tourism even more difficult.

In this context, existing instruments shall be evaluated with a view to efficiency, procedure and simplified access. Due to the development and establishment of networks between new forms of financing, the financing of investment projects in the field of tourism shall be strengthened. The directive funding guideline on thematic financial support is to supplement the present offer in order to be able to react flexibly on short-term needs and requirements of the tourism enterprises. The connection between Austrian and European instruments brings about leverage; in this context the interplay between tourism, agriculture and rural development shall be taken into consideration.

The tourism industry profits from the financing offer of the Austrian Bank for Tourism Development (ÖHT), which has been closely coordinated with the Federal Provinces and the commercial banks. Its comprehensive knowledge about this branch of industry and its service offers shall be used to support the tourism industry even better in questions of financing.

AREAS OF ACTIVITY

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– STRENGTHENING FAMILY-RUN AND OWNER-MANAGED ENTERPRISES AS THE BACKBONE OF AUSTRIAN TOURISM BY MEANS OF FINANCING AND SUBSIDISATION MECHANISMS

Subsidisation and financing instruments with a clear focus shall accompany and support the content-related priorities of the Master Plan at different levels. For this purpose, thematic and flexible instruments are needed, which enable targeted, small-scaled subsidies. The goal is the extension of the existing subsidisation instruments by means of short-to medium-term impulse calls.

– CREATING EQUITY MEZZANINE FINANCING INSTRUMENTS

New financing instruments shall be developed and tested in order to open up alternatives to traditional forms of financing for enterprises. More diversity corresponds to the increasing diversification of the sector. The goal is to supplement the range of subsidisation offers by equity mezzanine financing instruments.

– STRENGTHENING THE AUSTRIAN BANK FOR TOURISM DEVELOPMENT (ÖHT) AS A PROVIDER OF KNOW-HOW

More know-how about the possibilities and offers of the ÖHT in the bank and tourism sectors enables a better utilisation of the subsidisation and financing instruments. Required funds can thus be allocated in a more targeted way, and used in a more sustainable way. The goal is to make the offer and the wealth of experience of the ÖHT visible.

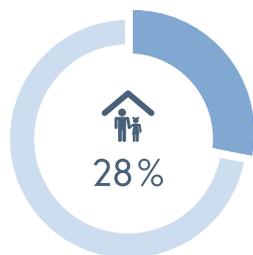


MAKING SUCCESS MEASURABLE

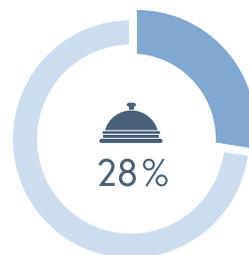
So far, the success of tourism has mainly been measured by quantitative parameters such as overnight stays and arrivals, which reflect, however, only a partial aspect of this industry. Thus, for a targeted tourism policy, instruments are needed which permit a comprehensive picture and a holistic view. By means of a new set of indicators all aspects of the development of Austrian tourism, which comprise, according to the definition of sustainable tourism, the economic, socio-cultural and ecological dimensions, are to be examined in future.

In future, the focus will be on the Tourism Satellite Account (TSA). In this way, the value-added and the employment effects are calculated and the monetary dimension of the tourism industry becomes visible. The TSA does not only reflect overnight, but also day-trip tourism and shows the interrelatedness of tourism with other branches of the economy. On the basis of the TSA calculations the overall expenses can be distributed among the various categories which illustrates the complexity of the integrated tourism industry.

TOURISM CONSUMPTION ACCORDING TO PRODUCTS IN AUSTRIA



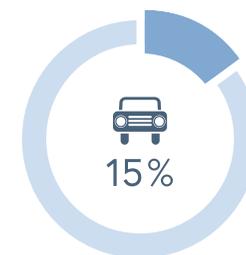
Accommodation¹



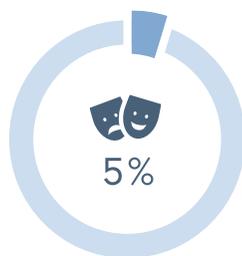
Gastronomy



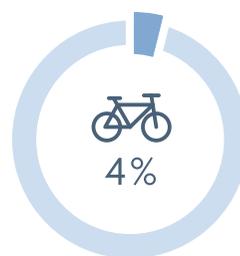
Purchasing, services



Passenger transport



Culture



Sports and Recreational



Others

Percentages are rounded.

¹ Including expenditures by visiting relatives/friends as well as for stays at secondary residences

Presently the data is available at federal level (produced by Statistics Austria and the Austrian Institute of Economic Research on behalf of the Federal Ministry for Sustainability and Tourism) and for the individual Federal Provinces. The goal is a joint procedure with the Federal Provinces in order to calculate all regional TSAs.

The economic situation of enterprises will in future be evaluated on the basis of RevPAR (Revenue Per Available Room) and a fictitious debt repayment period. With the share of renewable sources of energy in the total energy consumption of the hotel and gastronomy industry, an ecological component is also taken into consideration for the first time. The satisfaction of the guests constitutes an important criterion, which together with employment constitutes the socio-cultural dimension of the TSA. However, for people's acceptance and awareness for tourism there exists, for the time being, neither at international level nor at national level an appropriate indicator. As soon as a feasible model is available it will also find entrance into the following set of indicators as well as an even more detailed presentation of the importance of tourism for regional living environments.

In order to measure the popularity and competitiveness of the tourism destination, data on arrivals and overnight stays will also be collected in future according to European legal bases. With the additional indicators, the status quo of the tourism destination can be better reflected. The set of indicators provides an objective picture of the situation of tourism in Austria, serves as a basis for decisions for politics, and as a basis for a regular screening of tourism.

FUTURE ORIENTED SYSTEM OF INDICATORS

- **VALUE-ADDED**
SOURCE: TSA
- **Ø EMPLOYMENT**
SOURCE: TSA
- **SHARE OF GDP**
SOURCE: TSA
- **REVENUE PER AVAILABLE ROOM**
SOURCE: ÖHT
- **TOURISM EXPENSES**
SOURCE: TSA
- **FICTITIOUS DEBT REPAYMENT PERIOD**
SOURCE: ÖHT
- **GUEST SATISFACTION**
SOURCE: T-MONA
- **SHARE OF RENEWABLE SOURCE OF ENERGY IN ACCOMODATION**
SOURCE: STATISTICS AUSTRIA
- **SHARE OF RENEWABLE SOURCE OF ENERGY IN GASTRONOMY**
SOURCE: STATISTICS AUSTRIA
- **ARRIVALS**
SOURCE: STATISTICS AUSTRIA
- **OVERNIGHT STAYS**
SOURCE: STATISTICS AUSTRIA



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