

ANNUAL TOURISM REPORT 2009 AUSTRIA

1. INTRODUCTION

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

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

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

The main aims for the reporting process are to:

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

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

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

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

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

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

2. ORGANISATIONAL STRUCTURE

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

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

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

Under Austrian constitution, legislative authority in tourism affairs is not vested in the federal government, but in the country's nine States. Nevertheless, as tourism is a typical cross-cutting sector, both Federal and European laws impinge on it. At the national level, tourism policy lies within the purview of the Federal Ministry of Economy, Family and Youth (hereinafter referred to as 'the Ministry'). In 2007 the Ministry has set up a platform of representatives of all nine States and the federal government in order to work on a strategic coordination in tourism issues. With the implementation of the new tourism strategy at the beginning of 2010 the newly established steering committee - consisting of representatives of all States and the federal government - has taken over these coordinative issues of the platform. Link: <http://www.bmwfj.gv.at/>

The Austrian National Tourist Office (ANTO or Österreich Werbung) is the country's national tourism marketing organisation. It receives basic funding from the Ministry (75%) and the Austrian Federal Economic Chamber (25%). ANTO operates 30 worldwide offices and representations (thereof 14 so-called Austria Centers, i.e. representations operated in cooperation with the Austrian Federal Economic Chamber), responsible for tourism marketing in 9 regions and 40 markets. The organisation carries out strategic marketing activities based on product knowledge and market trend analysis - in 2009 more than 1,500 marketing activities. Total budget in 2009: 52 mn. Euros. Since 2008 a new advertising campaign has been promoting holidays in Austria. Links: www.austria.info b2c and <http://www.austriatourism.com> b2b.

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

National level

In December 2006, the Austrian parliament established the parliamentary committee on tourism. The responsible National Tourism Authority (NTA) is the Department for Tourism and Historic Objects of the Ministry. The tasks of the Department for Tourism and Historic Objects are: strategic orientation of the national tourism policy; representation of Austria in international organizations and in the European Union; strategic use of budget funds to support activities in the tourism and leisure industry and the provision of information and

tourism service.

For the description of ANTO see item 2.1.

The Austrian Bank for Tourism Development (OEHT) is a specialized client-oriented bank (a subsidiary of the three largest Austrian banks of Austria) providing financing for and subsidies to Austrian tourism businesses.

Links: Department for Tourism and Historic Objects <http://www.bmwfj.gv.at/tourismus> and Austrian Bank for Tourism Development <http://www.oeht.at>

The Austria Wirtschaftsservice AWS is also a specialized bank owned by the Federal Republic of Austria and entrusted with providing business related economic support to SMEs. Link: <http://www.awsg.at>

Statistics Austria, a former Federal Agency, is in charge of collecting and disseminating data in tourism statistics. Link: http://www.statistik.at/web_en/

Other important organisations at national level are the Federal Economic Chamber WKO (representing among others by compulsory membership the interests of all leisure and tourism entrepreneurs) as well as the Austrian Federal Chamber of Labour AK (representing among others the interests of the tourism labour force). They belong to the so-called Social Partners. Links: WKO <http://wko.at> and AK <http://www.arbeiterkammer.at/>

There are two major tourism associations at national level which represent the interests of their members (voluntary membership) - the Association of Austrian Hoteliers (ÖHV) and the Association of Austrian travel agencies and tour operators (ÖRV). Links: ÖHV <http://www.oehv.at/> and ÖRV <http://www.oerv.at/>

State level

According to article 15 B-VG, the nine States are responsible for tourism. The States' governments are issuing their own 'tourism laws' and a number of other regulations affecting tourism, e.g. environmental regulations.

Furthermore, they give subsidies to tourist destinations and projects. Apart from governing tourism issues, each State has its own tourist office in charge of tourism promotion in and outside of Austria. (Burgenland: <http://www.burgenland-tourism.at/>; Carinthia: <http://www.kaernten.at/>; Lower Austria: <http://www.noe.co.at/>; Salzburg: <http://www.salzburgerland.com/>; Styria: <http://www.steiermark.com/en/>; Tirol: <http://www.tirol.at/xxl/en/index.html>; Upper Austria: <http://www.oberoesterreich-tourismus.at/>; Vienna: <http://www.wien.info/>; Vorarlberg: <http://www.vorarlberg.travel/>).

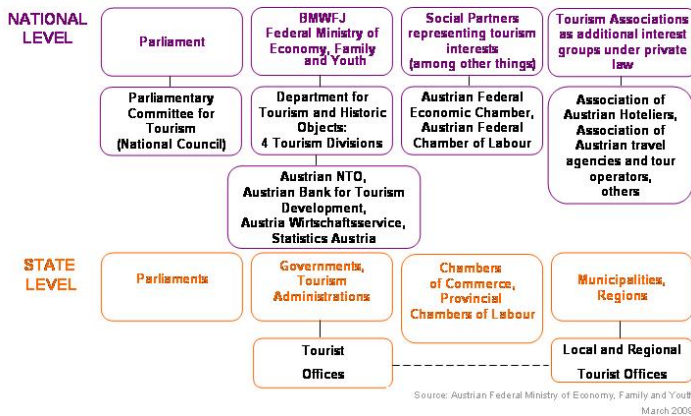
Furthermore, institutions of the social partners represent the interests of their members, especially during legislative processes on the State level.

Local level

At local level each Mayor is also co-responsible for the tourism development in his/her community/destination. At that level the so-called 'Ortstaxe' is levied (a small amount of tax which is collected on accommodation services; to be used by the local community to establish and maintain tourism facilities).

Fig. 1: Organisation of Tourism in Austria

Organisation of Tourism in Austria



2.3 Please provide information about **financial data**, including tourism budget as a percentage of overall government budget, the amount of national funding support for tourism marketing, the amount of EU funding support made available for tourism and data concerning the support to SMEs and destinations. (1000 characters)

No figures are available about the tourism budget as a percentage of overall government spending due to the decentralized competences (see 2.2). In 2009, the national tourism administration had a budget of around EUR 62.5 mn., of which EUR 26.5 mn. were for the support for SMEs (including 1.5 mn. Euros for supporting bicycle tourism) administered by the Austrian Bank for Tourism Development, EUR 24 mn. were contributed to ANTO, and a further EUR 12 mn. dispensed by the Ministry in the form of individual subsidies, for research and other projects. In addition, a total of EUR 65.6 mn. in European Recovery Programme (ERP)-funds was available for loans to SMEs in the tourism industry. All nine states also have their own tourism budgets and tourism development programmes.

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

3. POLICIES AND STRATEGIES

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

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

In autumn 2009 the Federal Minister for Economy, Family and Youth initiated a new Tourism Strategy in close collaboration with the nine States and all relevant tourism stakeholders. A key element of the new Tourism

Strategy is the focus on Austria's unique selling propositions: Alps, Danube and lakes, cities and culture. The Alps and the river Danube are well known by international tourists and represent unique landscapes of Austria, while cities and culture represent the values, which have been created by humankind. Austria's tourism promotion and marketing shall be focused on these elements in the future.

During the implementation process of the new tourism strategy, measures will be taken in five key areas:

1. Marketing: focus of marketing activities on the USPs (Alps, Danube and Lakes, cities and culture), closer cooperation between NTO and regional Tourism Organisations, continuation of marketing campaigns in neighbouring markets.
2. Subsidies: thematic priorities (related to USPs but also sustainability-related topics, e.g. energy efficiency), focus on innovation, well-defined competences of Federal and the nine States' authorities by means of the '*Förderpyramide*' (reflecting what projects are of state and/or federal interest), strengthening of public private partnerships (PPP) with Austrian Tourism Bank (OEHT).
3. Innovation: increase subsidies for innovative projects, competition for innovative regions in Austria (like 'model regions', 'Innovation-Coach'), NTO offers product-innovation-workshops.
4. Infrastructure: strengthen infrastructure for summer tourism (fight seasonality), enforce cooperation among regions and municipalities especially for financing infrastructure; further development of alpine infrastructure but also of public transport to, from and within tourism regions as well as accessibility (tourism for all).
5. Business environment: ensure a competitive business environment by keeping the administrative burden low, especially for SMEs, constant improvement of tourism education and qualification.

Cooperation of all actors, especially on the national and the state level, is a key for a successful implementation of the strategy. For this purpose, an Austrian high-level tourism conference will be held annually, and an Advisory Council (independent tourism experts) was set up, that reports to the conference on recent trends, current challenges and recommends further procedures and measures. A steering committee consisting of high-ranking civil servants was further established.

The new tourism strategy is more a process than a finished written document. The strategy can be adapted with regard to new developments or needs in the global or in Austria's tourism situation.

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

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

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

The steering committee (see 3.1) will monitor the implementation of the strategy, will organise workshops on current topics (e.g. climate change, education) and will give recommendations to the members of the tourism conference. The implementation of the new tourism strategy is being monitored continuously. The annual tourism conference will both look back on the previous year and will deal with new future challenges. In general, the strategy can be adapted with regard to new developments or needs in the global or in Austria's tourism situation.

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

National level is among others responsible for:

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

* Responsibility: The Ministry

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

State level is responsible for:

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

4. MEASURES AND INITIATIVES

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

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

1 Economic prosperity

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

2 Social equity and cohesion

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

3 Environmental and cultural protection

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

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

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

One of the most important issues within the '**Tourism funding directive 2007**' lies in establishing all-season tourism or expanding the high seasons.

Link: <http://www.bmwfj.gv.at/Tourismus/Tourismusfoerderung/Seiten/Foerderungsprogramme2007-2013.aspx>

'Tourism model regions': This project was initiated by the parliament and directed by the Ministry. In June 2008, 4 representative regions, interested in moving towards all-season tourism ([Ferienregion Reutte und Verein Naturpark Tiroler Lech](#); [Montafon](#); [Steirisches Thermenland](#) and [Region Wörthersee](#)), were selected to take part in this project. Besides the focus on all-season tourism, the objective of the project lies in further developing sustainable tourism and in implementing innovations, by adapting existing resources. The results were presented by the participants at the end of 2009, the final report was presented to the public in early 2010 and thus best practices were made available to other regions.

Prolongation of the season for employees: qualification through training weeks before the season starts; effect: employees are longer employed; planned: 90% of the course costs are financed by national funds of the Arbeitsmarktservice (public employment service).

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

Tourism transport, especially the increasing road transport, is one of the key challenges due to Austria's strategic position in the heart of Europe. A big share of environmental impacts of tourism is caused by car and air travelling. So one objective of transport and environmental policy in Austria is to shift (tourism) transport from road to rail and also to replace short distance flights by rail.

Project 'Soft mobility in tourism':

Projects focussing on 'soft mobility' in tourism were undertaken with the participation of three federal ministries (The Ministry <http://www.bmwfj.gv.at>, Federal Ministry of Agriculture, Forestry, Environment and Water Management <http://www.lebensministerium.at>, Federal Ministry for Transport, Innovation and Technology

<http://www.bmvit.gv.at/en/index.html>), the nine States, model communities and implementation partners in transport and tourism already in the 1990ies. Pilot projects: <http://www.alpsmobility.net/>; <http://www.xeismobil.at>; <http://www.eco-travel.at>

These initiatives led to two important EU INTERREG-projects (2000-2006) which were supported by the Ministry:

- **'Alps Mobility II'**: Developing and implementing the transnational product 'Alpine Pearls': The **'Alpine Pearls'** (<http://www.alpine-pearls.com>) are exceptional holiday destinations in the Alps. The designation Alpine Pearls stands for a vacation with Soft Mobility in more than 20 unique Alpine destinations in Europe (Austria, Germany, France, Italy, Slovenia, and Switzerland). In Austria: Werfenweng, Neukirchen, Hinterstoder und Mallnitz. They promise sustainability, protection of climate and top quality tourism.
- **'Alpine Awareness'** (<http://www.alpineawareness.net>): The idea behind Alpine Awareness is to promote environmentally friendly travel (essentially public transport, but also travel by bicycle, by foot).

The success of these pilot projects is outstanding:

- Mobility service centres with a focus on tourism transport were introduced
- New public transport connections for tourism were established (e.g. Austrian Federal railways (ÖBB) improved their offers for tourism. Link: <http://www.oebb.at/en/index.jsp>)
- Continuous increase of public transport in winter as well as in summer seasons. Link: <http://www.werfenweng.org>

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

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

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

To this end, a guide entitled '*A Job in the Tourism and Leisure Industry - Attractive and Promising*' was published, providing valuable information on education and training opportunities in the field of tourism. The handbook is targeted at pupils, students, teachers, parents and those undertaking training. Links: http://www.bmwfj.gv.at/Tourismus/TourismusstudienUndPublikationen/Documents/getAjob_plakat.pdf
http://portal.wko.at/wk/dok_detail_file.wk?AngID=1&DocID=527688&StID=254708

The Ministry also wants to inform students about the national tourism industry's economic potential and the professional opportunities it offers. Therefore, a didactic and easy-to-use booklet, the so-called media-package '*Tourism and leisure industry*', has been published to be used by teachers and students in the classroom. Link: <http://aws.m-services.at/docs/aws.php?cont=home>

Additionally, the Austrian public employment service AMS has been implementing specific training schemes for employees in the tourism industry (e.g. regional qualification programmes, pre-season trainings, 'subsidies of distance' for job-seekers willing to accept a distant place of work, etc.). A new edition is being finalized in 2010.

- **Further initiatives** of the Federal Economic Chamber: Brochures to improve the image of the apprenticeship (Lehre): '*Karriere mit Lehre*' (career with apprenticeship), a film for apprentices, a

manual '*Get a job in tourism*', modernization of the job profiles, testing a tourism job for young people (media cooperation with an Austrian newspaper). Link: <http://portal.wko.at/?396235>. The information and image project '*Get a Job - your chances in tourism*' offers insights into real-world tourism jobs for young people looking for a job in this area. Link: http://www.bmwfj.gv.at/Tourismus/TourismusstudienUndPublikationen/Documents/getAjob_plakat.pdf
A campaign '*Glücksbringer*' (talisman) targets at attracting more young people into tourism apprenticeships (in cooperation with the Chamber of Commerce, started in four States).

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

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

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

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

- **Austrian Eco-label for Tourism**

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

- **Sustainable Building in Tourism**

In 2006, the Ministry published 'Guidelines for sustainable building in tourism' which were elaborated by a team consisting of experienced tourism and financial experts, planners, and building utility system experts. These guidelines published in a manual shall assist entrepreneurs in making their decisions concerning 'sustainable building solutions' for new tourist operations and extensions and modifications to existing facilities. Link:

<http://www.bmwfj.gv.at/NR/rdonlyres/9659D5D6-C7C8-42C2-B115-8A4BB86DC5E1/0/NachhaltigesBauenimTourismusLeitlinien.pdf>

- **Energy efficiency**

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

- **Alpine Huts**

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

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

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

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

Austria also participates in the EU Initiative EDEN - *European Destinations of Excellence* - which has been taking place from 2007 onwards. Under this initiative which is dedicated each year to a special theme (2009 'Tourism and protected areas', 2010 'Aquatic tourism') destinations compete in the areas of innovative product development and marketing combined with social, cultural and environmental sustainability. The EDEN-project allowed destinations to verify their strategies on sustainability with the help of a given analytical set of criteria developed by an expert team. For many destinations the application process itself was very important, even though they were not finalists or the national winner. The follow-up workshop organised after the awarding ceremony in the winning destination proved to be a very successful instrument for discussion, exchange on issues of common interest and networking between all the participating destinations.

Link: http://ec.europa.eu/enterprise/sectors/tourism/eden/what-is-eden/index_en.htm

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

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

- Permanent workshop 'Barrierefreies Reisen für alle' (barrier-free travel for all)
- publication of brochures, e.g. 'Travelling for all - barrier free planning and constructing in tourism' and 'Tourism for all - guidebook for barrier free natural offerings'

Links:

<http://www.bmwfj.gv.at/Tourismus/TourismusstudienUndPublikationen/Documents/Tourismus%20für%20alle.pdf>;

<http://www.bmwfj.gv.at/Tourismus/TourismusstudienUndPublikationen/Documents/Umschlag%20und%20Kern%20Tourismus%20für%20Alle.pdf>

- organisation of informative events

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

- The current challenge is to implement effective instruments to help the tourism sector overcome the economic crisis
- Enforcing all-season tourism: innovations regarding the threat of climate change
- Raising the competitiveness of hotel establishments

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

The Austrian Tourism Development Bank (see 2.2) provides financing for and subsidies to Austrian tourism businesses. In view of the economic crisis well-proven instruments have been expanded and new ones have been developed. Amongst these instruments are:

- extension of subsidized loans to tourism SMEs;
- bank guarantees with a doubling of the liability (guarantee) limit of the Tourism Development Bank from EUR 250 million to EUR 500 million, with a maximum allocation of EUR 4 million per case;
- for certain investments, small grants (i.e. non-refundable) are given to tourism enterprises;
- micro credits have been introduced as a new instrument for small investments up to EUR 100.000,00 (note: subject to change); and
- bridging finance has been provided for those enterprises affected by the crisis; companies which have been stable in economic terms in 2008 can extend their debit limit for a specific period of time based on a government guarantee. State aid for bridging finance is not applicable for companies in difficulties.

All of these measures are foreseen to be implemented for a period of maximum two years as it is expected that from 2011 onwards the economic situation will stabilise.

5. MECHANISMS FOR IMPLEMENTATION

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

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

On behalf of the Ministry special activities for selected destinations have been initiated with the aim to create best practices and spread knowledge among other destinations shall enhance the international competitiveness of Austria's destinations and holiday regions (e.g. the development of model regions). Link: <http://www.bmwfj.gv.at/Tourismus/TourismuspolitischeAktivitaeten/Seiten/Modellregionen.aspx>. (see 4.1.1.)

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

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

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

In order to inform actors in the tourism industry about implications of climate change and possible response strategies, the Ministry supports awareness raising and information measures in cooperation with other important stakeholders (e.g. a publication on best practices, contact points and opportunities for subsidies for the tourism industry in the areas of clean energy, water, construction and mobility together with the Federal Ministry of Agriculture, Forestry, Environment and Water Management and other partners; a special publication on the practical implementation of energy saving measures for the sector; the dedication of the Austrian National Award for Tourism 2009 - see 4.1.6 - to the subject of energy efficiency). Link:

<http://www.bmwfj.gv.at/Presse/Archiv/Archiv2008/Seiten/a9d33fde-7280-404c-b0ee-61b452a03b2e.aspx>

Furthermore, the Ministry supports the national research programme on climate change and its effects (StartClim, Link: www.austroclim.at/startclim) since the start of the programme in 2002, commissioning several studies on the effects of climate change on the tourism sector. In 2009, one study focused on the interlinks between climate change and travel behaviour ('*Klimawandel und Reiseverhalten*', Link:

<http://www.bmwfj.gv.at/Tourismus/TourismusstudienUndPublikationen/Documents/Sammelmappe1%20Klimawandel%20Reiseverhalten.pdf>) from a scientific perspective.

Further initiatives:

- Austrian Eco-label for Tourism
- Thematic brochures by the Ministry and Federal Chamber of Commerce on 'accessibility in tourism'.

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

- Austrian Eco-label (see 4.1.5)
- Sustainability is additionally an issue in the marketing campaign by the ANTO and is an integrated part of Austria's brand value as a tourism destination. However, there is no distinct target group marketing 'sustainability' as it is regarded more as a horizontal issue.
- The Ministry has already set up several initiatives in order to disseminate the UNWTO Code of Ethics, e.g. target-group specific brochures of the Code of Ethics for all stakeholders in tourism. EU-project 'Offenders beware' 2008-2011: Teaching materials regarding responsible tourist behaviour, child labour and sexual exploitation in the global travel industry have been distributed among 60 tourism schools and higher educational institutions.

- Education: Media package (see 4.1.3) including topics such as ethics in tourism and sustainability.

6. DATA AND INDICATORS

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

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

TourMIS is a Marketing-Information-System for tourism managers. The major aim of TourMIS is to provide information and decision support for tourism managers and scholars. Therefore, TourMIS provides on-line tourism survey data, as well as various tools to transform data into precious management information. Since 2000 this initiative has provided the tourism industry with predominantly free access to overall data and functions of TourMIS (registration is required). TourMIS is open to all authorized tourism organizations, societies, tourism consultants, companies, tourism training centres, pressure groups, etc. in Austria and abroad. The development of TourMIS is financially supported by the ANTO and the European Travel Commission (Link: <http://www.etc-corporate.org/>). Link: <http://www.tourmis.info>

T-MONA, an innovative guest monitoring system was launched in 2004. This system was a joint project of ANTO, the Ministry, the Austrian Federal Economic Chamber, all nine states' tourism organisations, and many regions. T-MONA is a web-based management information system gathering information on travel behaviour and socio-demographic data, which provides an up-to-date picture of domestic and foreign tourists in Austria. Direct collection of data obtained in surveys makes it immediately available for analysis and also permits easy presentation of results in the form of statistical diagrams or tables.

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

7. COMPLEMENTARY ADDITIONAL INFORMATION

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

Vienna, June 2010

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

APPENDIX

PRINCIPLES FOR THE SUSTAINABILITY OF TOURISM:

- **Taking a holistic and integrated approach**

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

- **Planning for the long term**

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

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

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

- **Involving all stakeholders**

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

- **Using best available knowledge**

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

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

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

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

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

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

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

- **Undertaking continuous monitoring**

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

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

The following list of indicators was presented to the June 2008 TSG meeting by EUROSTAT. Please note that the list of indicators as presented below is not yet final (some indicators may still be dropped).

- 1a** Annual number of nights spent at collective accommodation establishments, broken down by region (NUTS2)
- 1b** Monthly number of nights spent at collective accommodation establishments
- national level
- 3a** Number of collective accommodation establishments, broken down by region (NUTS3) and by type of establishment (Hotels and similar establishments ; Other collective accommodation establishments (total) ; Tourist campsites ; Holiday dwellings ; Other collective accommodation not elsewhere specified)
- annual data
- 3b** Number of bedplaces in collective accommodation establishments, broken down by region (NUTS3) and by type of establishment (Hotels and similar establishments ; Other collective accommodation establishments (total) ; Tourist campsites ; Holiday dwellings ; Other collective accommodation not elsewhere specified)
- annual data
- 4a** Monthly gross occupancy rate of bedplaces in hotels and similar establishments
- national level
- 4b** Monthly net occupancy rate of bedplaces in hotels and similar establishments
- national level
- 5a** Total turnover [or year-on-year growth rate] of selected tourism-related industries, broken down by industry (total horeca ; hotels, camping sites, other provision of short-stay accommodation) and by employment size class (1 employee ; between 2 and 9 ; between 10 and 19 ; between 20 and 49 ; between 50 and 249 ; 250 employees or more)
- annual data, national level
- 5b** Total turnover [or year-on-year growth rate] of selected tourism-related industries, broken down by industry (Hotels and restaurants ; Hotels, camping sites, other provision of short-stay accommodation ; Restaurants, bars, canteens and catering ; Activities of travel agencies and tour operators, tourist assistance activities not elsewhere classified)
- annual data, national level)
- 6a** Tourism receipts from inbound tourism ('travel item' from the Balance of Payments)
- annual data, national level
- 6b** Ratio tourism receipts from inbound tourism in relation to tourism expenditure on outbound tourism
- annual data, national level
- 6c** Tourist expenditure by residents on holiday trips with at least one overnight stay, broken down by destination (total ; domestic trips ; outbound trips within the EU ; outbound trips outside the EU)
- annual data, national level
- 8a** Variation of the ratio monthly gross versus net occupancy rate of bedplaces in hotels and similar establishments
- national level
- 9a** Ratio of net [or gross] occupancy rate of bedplaces in hotels and similar establishments between the busiest and the least busy month
- national level

- 10a** Number of bedplaces at collective accommodation establishments per 1000 (local) inhabitants, broken down by region (NUTS3)
– annual data
- 11a** Number of nights spent at collective accommodation establishments per 1000 (local) inhabitants [or in comparison to local inhabitants nights, i.e. number of inhabitants x 365], broken down by country of origin (residents ; non-residents) and by region (NUTS2)
– annual data
- 11b** Number of arrivals at collective accommodation establishments per 1000 (local) inhabitants, broken down by country of origin (residents ; non-residents) and by region (NUTS2)
– annual data
- 11c** Monthly number of nights spent at collective accommodation establishments per 1000 (local) inhabitants [or in comparison to local inhabitants nights, i.e. number of inhabitants x number of days in the month], broken down by country of origin (residents ; non-residents)
– national level
- 11d** Monthly number of arrivals at collective accommodation establishments per 1000 (local) inhabitants, broken down by country of origin (residents ; non-residents)
– national level
- 12a** Average length of stay at collective accommodation establishments, broken down by country of origin (residents ; non-residents) and by region (NUTS2)
– annual data
- 12b** Number of holiday trips of 4 nights or more by EU residents, broken down by length of stay (From 4 to 7 nights ; From 8 to 14 nights ; From 15 to 28 nights ; From 29 to 91 nights ; From 92 to 365 nights) and by destination (domestic ; outbound)
– annual data, national level (country of residence of the tourist)
- 12c** Number of tourism trips with overnight stays by EU residents, broken down by length of stay (1 to 3 nights ; 4 nights or more), by destination (domestic ; outbound) and by purpose of the trip (holidays ; business)
- quarterly data, national level (country of residence of the tourist)
- 14a** Number of tourism trips of 4 nights or more by EU residents, broken down by main means of accommodation used (air ; sea ; land (total) ; railway ; bus, coach ; private and hired vehicles ; other) and by destination (domestic ; outbound)
– annual data, national level (country of residence of the tourist)
- 16a** Number of persons employed in [or share in total employment of] the tourist accommodation sector, broken down by type of contract (fulltime ; parttime ; permanent ; temporary), by age group, by gender, by educational level, by average seniority of work with the same employer
- quarterly data, national level
- 17a** Ratio of the number of persons employed in the tourist accommodation sector in the peak season (quarter) compared to the lowest season (quarter)
- national level
- 18a** Ratio of the mean hourly earnings in the horeca sector compared to the total private sector (local units of enterprises with 10 or more employees), broken down by gender, age, employment contract, educational level, length of service with the enterprise
- 4-yearly data, national level
- 18b** Ratio of the mean hourly labour cost in the horeca sector compared to the total private sector (local units of enterprises with 10 or more employees), broken down by region (NUTS1)
- 4-yearly data

45 a Share of households that can't afford one week annual holiday away from home
- annual data, national level (country of residence of the household)