



Austrian Tourism Development 1950–2016: Less landscape & More Technology



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Structure of Development Periods in Austria

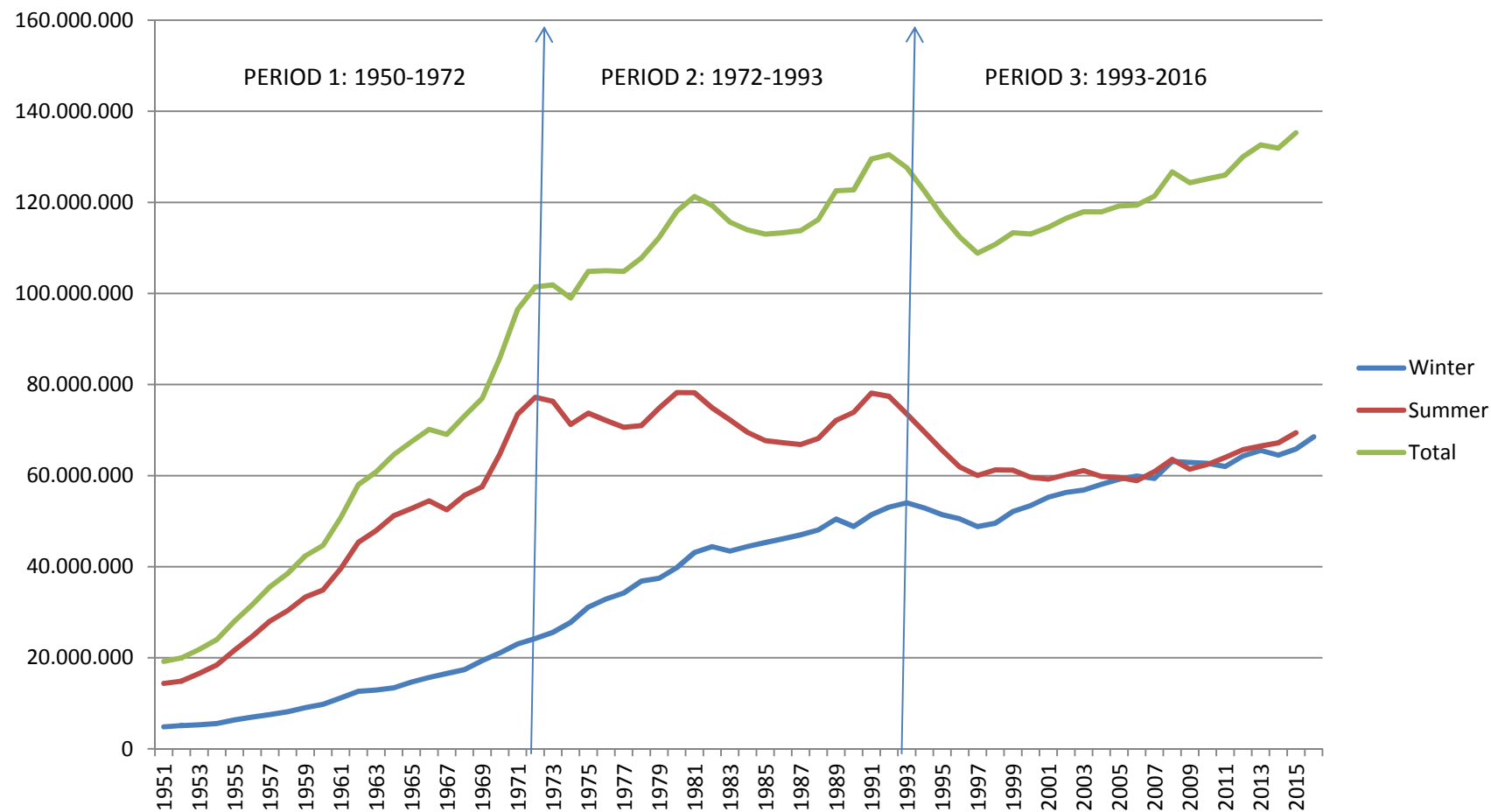
Period 1: 1950 – 1972 Growth of (mainly) Summer
Tourism

Period 2: 1972 – 1993 Growth of Winter Tourism

Period 3: 1994 – 2016 Adaptation [and Innovation]
of [primarily Winter] Tourism

Period 4: Future? Round Table „Sustainable Tourism
Destinations“

Development of Austrian Tourism 1950 to 2016 (overnight stays)



Period 1: 1950 - 1972

- Particular growth of summer tourism
 - Comes up to 78% of overnight stays
- Winter tourism is growing too
 - But not yet so usual and is 22% at the end of the period
- Tourists come mainly from Germany
 - Austrians are second largest groups
 - Other Western European Countries like BeNeLux
 - Few tourists from other countries
- Reasons of growth
 - More income, more holidays
 - Affordability of automobiles
 - Most tourists arrive individually by car
 - Public transport trains, coaches, boats are less important
- The traditional cultural landscape in Austria is main asset for tourism
 - Tourism is almost entirely rural
 - Varied cultural landscapes in Austria
 - Alpine landscapes for hiking
 - Lakes for swimming
 - Many landscapes can fulfill the desire of changing the environment

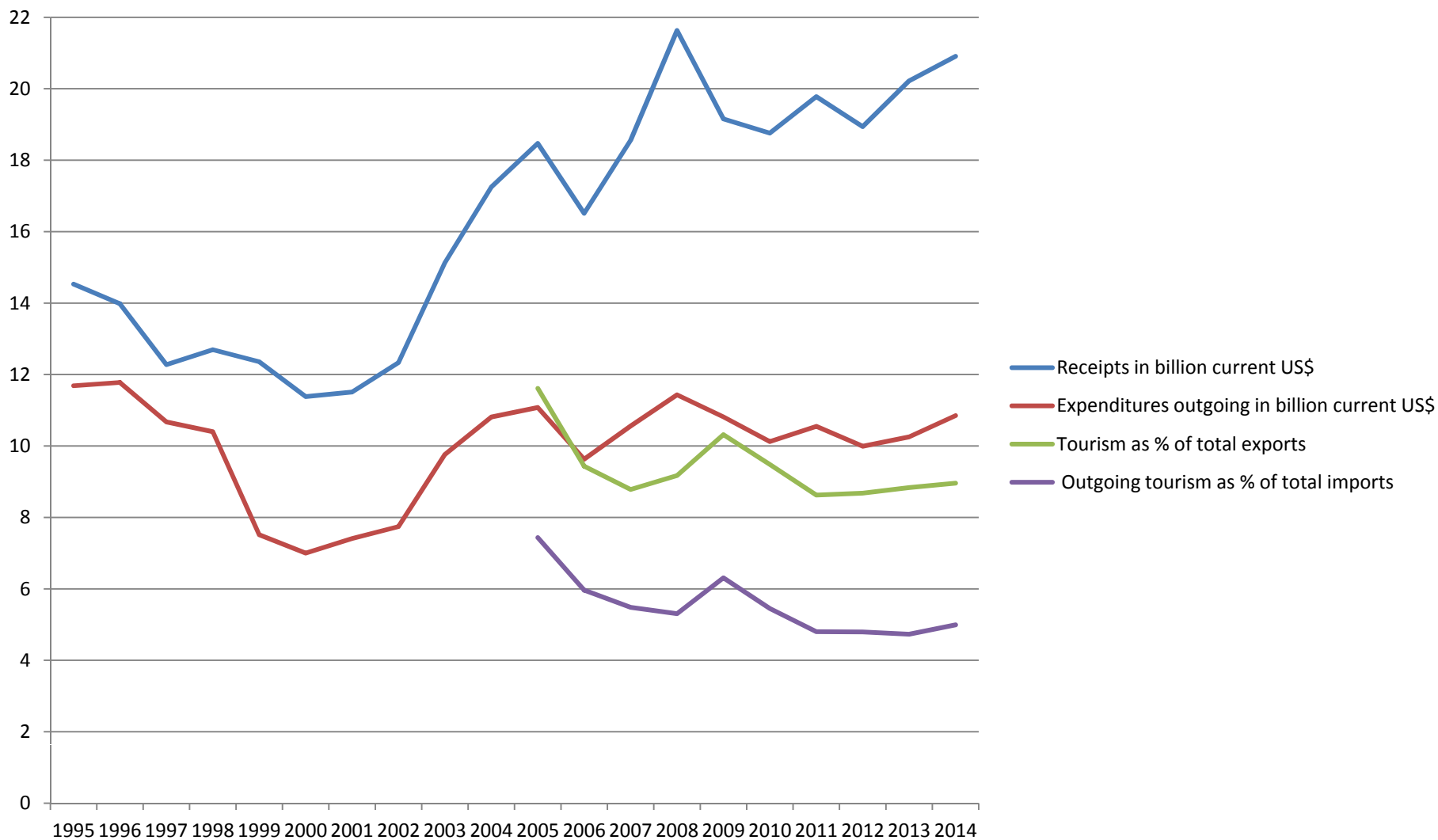
Period 2: 1973 - 1993

- Stable summer tourism
 - Fluctuations at 75 million overnight stays per year
 - Relative share is declining from 78% to 58% of guestnights
- Growth in Austrian tourism is only due to winter
 - From 23 to 55 million overnight stays per year
 - Relative share from 22% to 42%
- Tourism market is more or less the same
 - Germany, Austria, Benelux,
- Means of transport remains relative stable
 - Cars, train, coach, increasingly more airplanes
- More Alpine tourist destinations in wintertime and built out of destinations for two seasons
- More winter tourist infrastructure
 - Particular arrangements for winter tourism, preparation of terrain, first installments of snow making
 - Austria counts some 600 ski resorts
- Increasing environmental problems and consumption of landscape
 - Problems of overuse and pollution
 - Books like „Krippendorf, die Landschaftsfresser“ (1982)
 - Also first snow making facilities in this period

Period 3: 1994 – 2016

- Decline in summer tourism
 - Drop to 60 million overnight stays for more than a decade and recently again increase to 70 million
 - More or less equal overnight numbers during summer (50%) and winter period (50%)
 - Income is higher in winter tourism period
- Means of transport
 - Air transport becomes more important and some 10% of tourists arrive via air
 - Tourists from Eastern European Countries and Russia explore Austria
 - The proportion of global tourists increases
 - Many more competitors on the global scale
 - Increasingly more far distance tourism locations compete with domestic ones
 - Growth of urban tourism to 20% (Vienna and provincial capitals)
- No more new destinations
 - Built out and adaptations in many destinations
 - Climate change and winter tourism
 - Closing of many smaller resorts
 - Lacking means of adaptation
 - Innovation becomes necessary for survival of a tourist destination
 - Tourism concentrates on the better off tourist destinations
- Less landscape is used for tourism on an Austrian scale
 - But the viable tourist destinations are used more intensively
 - A built back of marginally used destinations would be favourable

Income and Expenditures in Austrian Tourism in Period 3



Winter tourism economically more important than summer tourism

- With increasing income more money is available for tourism
- Winter tourism and skiing became Austria wide more productive than summer tourism
- 50% of tourism and 60% of Austrian tourism income is earned in winter (Nov. to April)
- Each kind of tourism brings more income than agriculture & forestry sector



Period 4: Future & Sustainability of Tourism Approximately 2040

- Options for Growth?
- Threats of Decline?
- Continuation of Today's Trends?
- Surprises?
- Welcome to Roundtable: „Sustainability of Tourist Destinations“