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NEW RECORD HIGHS OF 2024 IN AUSTRIA

Austria has shown significant growth in its tourism sector. New record highs in 2024: 154,3 million overnight stays (+2,1%) and 46,7 million arrivals (+3,3%) – thanks to high demand in summer and continued recovery in winter

In 2024, the Austrian tourism industry continued to grow in terms of the number of guests and their overnight stays. The total number of overnight stays rose to a new record of 154,3 million, exceeding the 2023 figure by 2,1% and the previous record level of pre-crisis 2019 by 1,1%. This growth is driven by both guest segments, with international tourist demand (114,1 million overnight stays) growing more dynamically year-on-year by +2,5% than domestic tourism (40,3 million), which grew by +0,9% (2019/2024 +1,1% compared to +0,8%). The upward trend in arrivals was even more pronounced in favor of foreign guests (+4,2% compared to +1,6% for domestic travelers, +3,3% overall).

The recovery of domestic tourism after the pandemic years occurred at different speeds in the two seasons. While arrivals and overnight stays returned to pre-crisis levels in the summer of 2022 and exceeded them the following year, the upward trend slowed in the winter, meaning that the gap with the 2018/19 season has still not been fully closed.

In total, almost 71.1 million overnight stays were recorded in the 2023/24 winter season, up 2,5% from the previous year. Both domestic and international guests stayed overnight in local hotels at roughly the same rate (+2,6% and +2,5% respectively) compared to 2022/23, with the international segment being more seasonally dominant than the annual average (77,2% compared to the annual average of 73,9%). Arrivals from November 2023 to April 2024 increased by just over 1 million (+5,5%) year-on-year to 20 million. This means that overnight stays and arrivals remained 2,1% and 2,5% below the pre-crisis level of 2018/19 respectively in both guest segments (foreign guests: -2,7% each, domestic overnight stays -1,7%, arrivals -0,4%). In comparison, overnight stays in summer 2024 increased only slightly (+0,9% compared to May-October 2023) to just over 81,6 million. While demand from domestic guests decreased slightly (by 0,3% to 23,8 million), there was growth in the foreign segment (+1,3% to 57,8 million). Total arrivals in the same period amounted to 26,4 million (+2,5% compared to the previous year's season). Unlike winter, the number of arrivals and overnight stays in summer exceeded the 2019 figures by 3,1% and 3,3%, respectively.

Austrian tourism recorded positive overnight stays in the most important foreign markets in 2024. The European market remained dominant, with EU countries (excluding Austria) accounting for 83% of the total international volume with 94,6 million overnight stays (+1,9% compared to 2023, +4,1% in 2019/2024), 2,3 percentage points more than in 2019. Domestic overnight stays lagged behind the dynamics of foreign demand, increasing by 0,9%. Domestic tourism accounted for almost a quarter (26,1%) of total overnight stays in Austria in 2024, ranking second after Germany. Demand from this neighbouring, most important source market (foreign market share in 2024: 51,3%) developed positively in 2024, reaching 58,5 million overnight stays, but was weaker year-on-year than the international average (+1,8% compared to an average of +2,5%; 2019/2024 +3,1% compared to an average of +1,1%). The Netherlands, the second most important foreign market, recorded a slight decrease compared to the previous year (-0,2%) with 11,1 million overnight stays, but was still 7,1% above the pre-crisis level. The countries of Central and Eastern Europe (Poland, the Czech Republic, Slovakia, Slovenia and Hungary) recorded a disproportionate increase in overnight stays, averaging +3,9% in 2024, reaching a total of 10,2 million. Poland (+5,5%) and Hungary (+4,1%) particularly stood out compared to the previous year; since 2019, demand has grown the most from Poland (+22,3%) and the Czech Republic (+15,3%). Switzerland (+6,7%) and the United Kingdom (+5,4%) also recorded significant growth in 2024, although they have not yet reached pre-crisis levels.

Among the long-haul markets, Asian markets have recovered noticeably from the pandemic-related downturn. China recorded a strong growth of 85,5% compared to 2023, but still lagged behind the previous 2019 level of 55,7%. In contrast, guests from India stayed overnight in Austria almost as often in 2024 as they did five years earlier (-1,7%, +21,1% compared to 2023); however, these two markets represent a very small part of the total international demand (together 0.9%, 2019: 1,6%). The USA, with a foreign market share of 2,1% (2024; 2019: 1,8%), also recorded a notable recovery (overnight stays +14,2% compared to the previous year, 2019/2024 +16,3%). Overall, the long-haul markets (here: BRIC countries (Brazil, Russia, India, China),

other CIS countries, Japan, Canada, USA, United Arab Emirates, Saudi Arabia) have not yet regained their former importance - their share of the total number of overnight stays from abroad was 4,9% in 2024, 1,4 percentage points below the 2019.