Measuring Tourism Acceptance in Austria

Methodology and Results 2025

Peter Laimer
Statistics Austria

UN Tourism Launch Webinar
Measuring residents' perceptions towards tourism

Online, 16 September 2026
www.statistik.at



Agenda

Measuring tourism acceptance – why?

Methodology

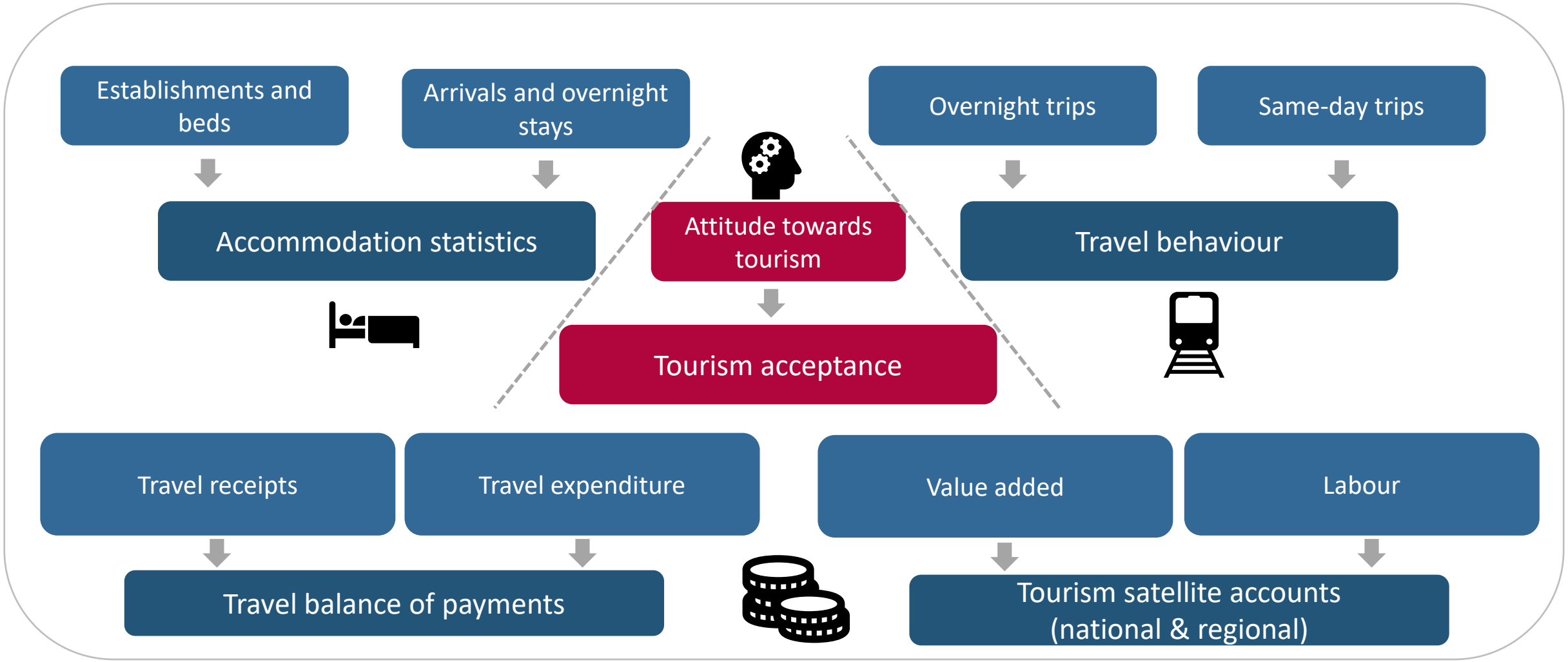
Questionnaire

Analyses & results 2025

Small Area Estimation Model

Conclusion

Statistics Austria
Tourism Statistics



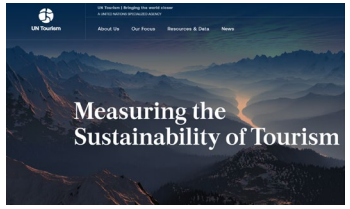
Measuring tourism acceptance – why? (1)
International standards

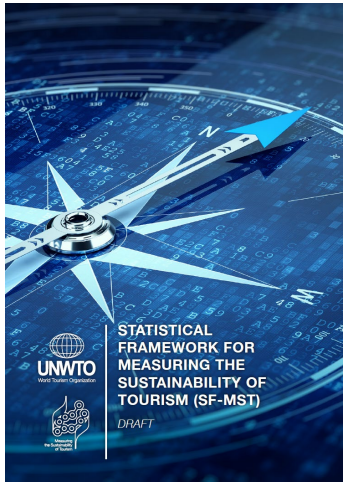
- For years description and measurement of tourism **solely by tourism flows and monetary contribution to economy** → demand- and supply-side effects are perceived by local communities

- Awareness to **look beyond economic indicators** to describe tourism → obtain holistic picture of the phenomenon of tourism

- A "**Statistical Framework for Measuring the Sustainability of Tourism**" (SF-MST) developed by UN Tourism, being the third statistical standard for tourism – after the "International Recommendations for Tourism Statistics" (IRTS) and the "Tourism Satellite Account" (TSA) – and valid for all UN member states.

- With regard to "**Measuring the host community perspective**", the SF-MST states: *"... The collection of data on the perceptions and acceptance of host communities would generally be undertaken using surveys of residents..."* (see paragraph 5.51).





Measuring tourism acceptance – why? (2)
National road to tourism acceptance indicator



Plan T – Masterplan for Tourism 2019 (till 2026)

- Development of sustainability indicators
- At this point no suitable indicator nationally or internationally for social pillar



Government programme 2020-2024 and **2025-2029**

- Consideration of new or expanded surveys by Statistics Austria (and financial resources) to provide data basis for indicators that cover the entire value chain and impact on the population
- The results of the tourism acceptance measurement are regularly analyzed, including tourism policy measures to strengthen tourism acceptance



2020-2023: Extensive pilot studies on tourism acceptance by a private market research institute commissioned by the ministry

Beginning of 2024: Amendment of the national tourism demand regulation (legal basis for demand statistics/travel behaviour) to include tourism acceptance



Vision T –Tourism Strategy of Austria until 2035

- Strategy that focuses on a tourism that is valuable to everyone 365 days a year
- Development of comprehensive indicator set for all aspects of sustainability, including tourism acceptance

Methodology

Tourism Acceptance – Add-on to tourism demand survey

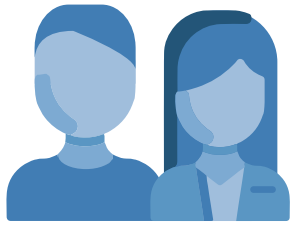
How?

Voluntary **additional** survey to the travel behaviour (tourism demand) survey and only for **CAWI** participants

ALL people in the sample are invited to complete the survey online

→ Only those who take part **online** are also asked about tourism acceptance.

Who?

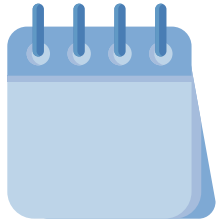


Proportionally stratified random sample: people who live in Austria and are between 15 and 85 years old

Sample from the **Central Register of Residents** (ZMR): 15 000 people with their main place of residence in Austria

Goal net-sample: 3 000/quarter → 12 000/reporting year

When?



Survey: Quarterly

- always following a quarter, a person is surveyed (e.g. 1st quarter survey in April)

Results: Annually

- On national and federal province level
- Regional results possible, but limited (e.g. SAE)

Legislation: Decree of the Federal Minister of Labor and Economy on statistics on demand and acceptance in the tourism sector

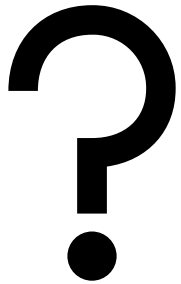
Questionnaire in force (1)
Impact of tourism

Question G1

How do you personally rate the impact of tourism on **your place of residence**?

Please really only think of your place of residence/municipality of residence.

1. Predominantly positive *(Filter to G1_1: Why?)*
2. Rather positive
3. Neutral
4. Rather negative
5. Predominantly negative *(Filter to G1_1: Why?)*
6. Don't know



→ Calculation of **Tourism Acceptance Score** (Place)

Question G1_1

Why do you rate the impact of tourism on where you live as *predominantly positive/negative*?

Please briefly explain the reason for your answer.

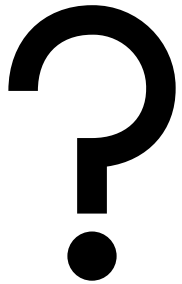
Questionnaire in force (2)
Perceived importance of tourism

Question G2_1

In your opinion, what importance does tourism (i.e. overnight and day trips) generally have for the economy, labour market and leisure activities in **your place of residence**?

Please really only think of your place of residence/municipality of residence.

1. High importance
2. Medium importance
3. Low importance
4. No importance (since 2025)
5. Don’t know



Question G2_2

In your opinion, what importance does tourism (i.e. overnight and day trips) generally have for the economy, labour market and leisure activities in **Austria**?

Please answer with your personal perception for the whole of Austria here.

1. High importance
2. Medium importance
3. Low importance
4. No importance (since 2025)
5. Don’t know

Questionnaire in force (3)

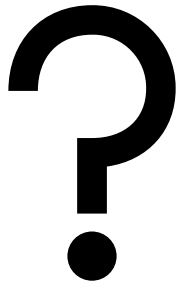
Perceived tourism intensity – risk of overtourism

Question G3_1

How do you personally feel about the number of tourists in **your place of residence**?

Please really only think of your place of residence/municipality of residence.

1. There are too few tourists.
2. There are rather few tourists.
3. The number of tourists is right for me.
4. There are rather many tourists. *(Filter to G3_1_1: Seasonality)*
5. There are too many tourists. *(Filter to G3_1_1: Seasonality)*
6. Don't know



Question G3_1_1 Seasonality

When do you feel that there are rather many/too many tourists in your place of residence? *Multiple answers possible*

1. All year round
2. In spring
3. In summer
4. In autumn
5. In winter
6. On other occasions (e.g. events)
7. Never *(**Warning**: Are you sure? You have said before that you think Answer of G3_1 in your place of residence.)*
8. Don’t know

Questionnaire in force (4)

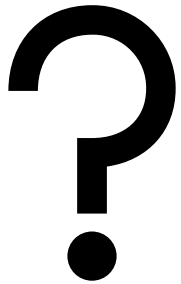
Perceived tourism intensity / Occupational dependency

Question G3_2

How do you personally feel about the number of tourists in **Austria overall**?

Please answer with your personal perception for the whole of Austria here.

1. There are too few tourists.
2. There are rather few tourists.
3. The number of tourists is right for me.
4. There are rather many tourists.
5. There are too many tourists.
6. Don't know



Question G4

What importance does tourism have for your professional or financial situation?

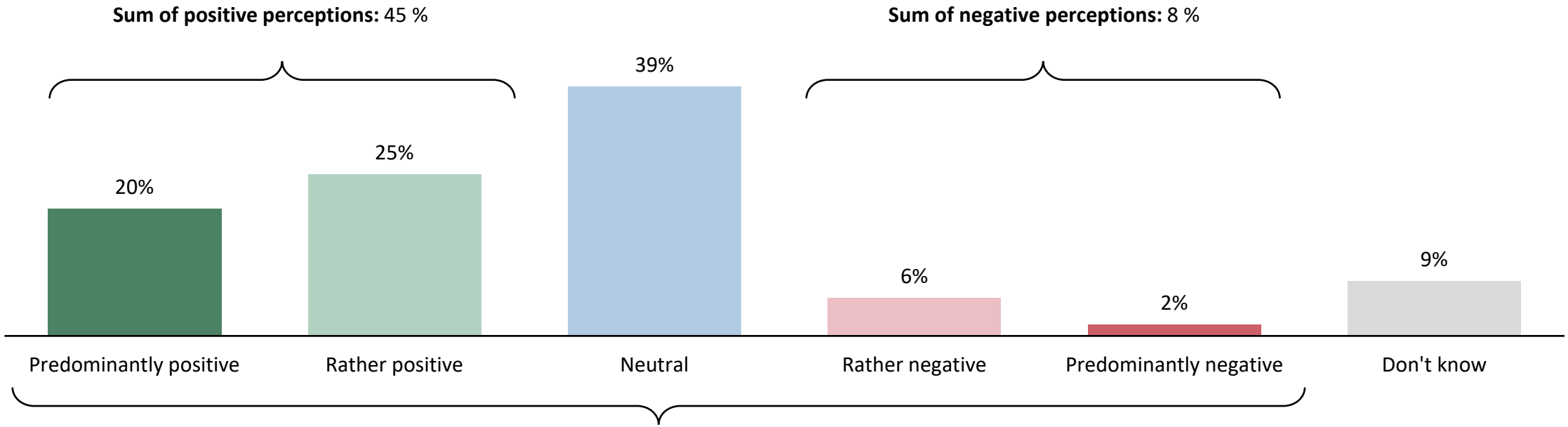
Please think about where your income comes from.

1. Very high importance
2. High importance
3. Medium importance
4. Low importance
5. No importance at all
6. Don’t know

Analyses & results 2025 (1)

45% have positive perception of tourism on place of residence

Perceived impact of tourism incl. calculation of Tourism Acceptance Score (TAS)

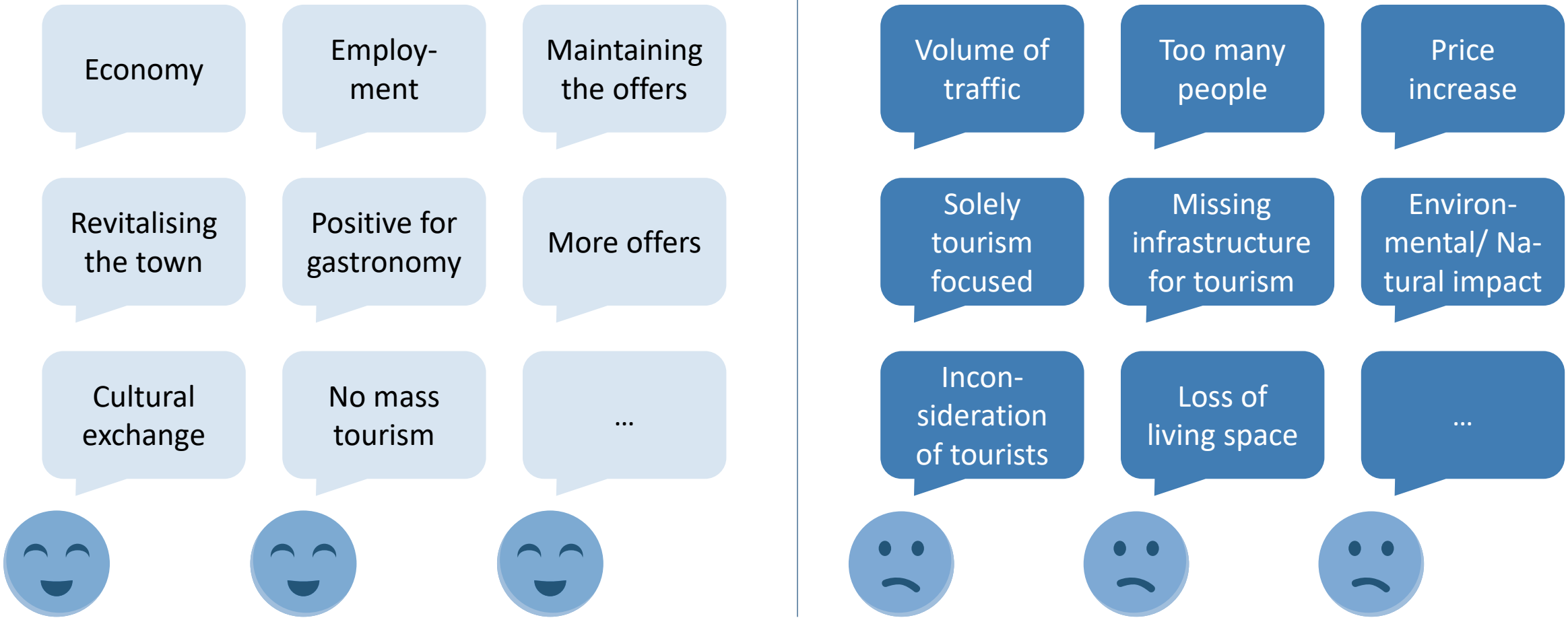


Tourism Acceptance Score (TAS)[1]: +37 %-Points
(= Sum of positive perceptions – sum of negative perceptions)

S: STATISTICS AUSTRIA, Tourism acceptance 2025. – Rounding errors were not corrected.
Question: *How do you personally rate the impact of tourism on your **place of residence**?*

Analyses & results 2025 (2)

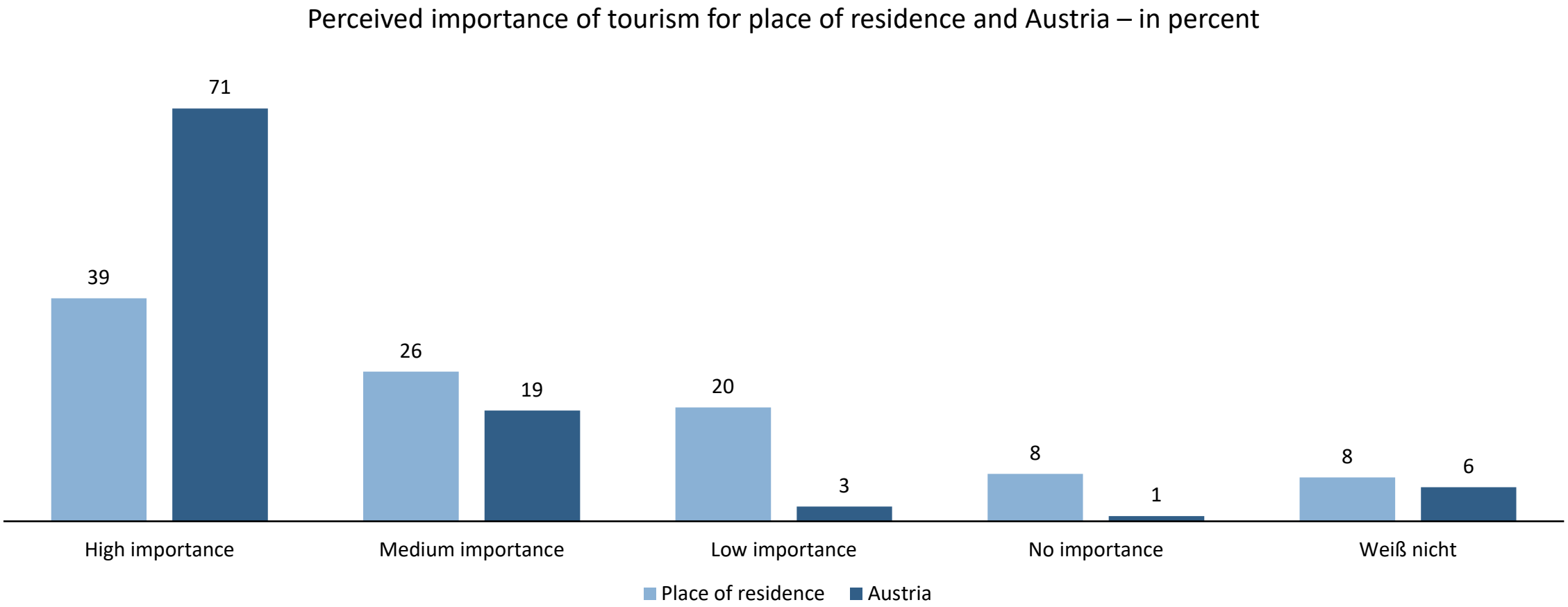
Why is tourism perceived predominantly positively or negatively?



S: STATISTICS AUSTRIA, Tourism acceptance 2025. Positive sssociations: n = 2 357, negative associations: n = 229
Question: *How do you personally rate the impact of tourism on your **place of residence**?*

Analyses & results 2025 (3)

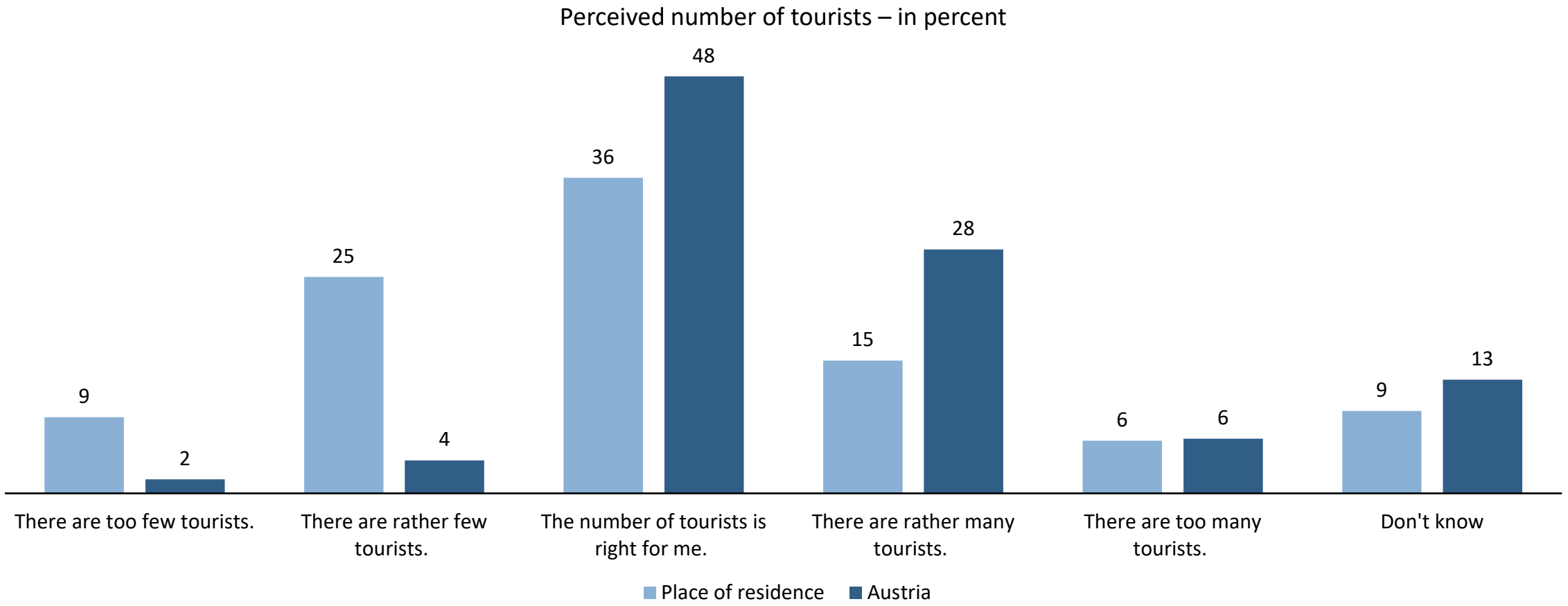
Almost three quarters see tourism as important for Austria



S: STATISTICS AUSTRIA, Tourism acceptance 2025. – Rounding errors were not corrected.
Question: *In your opinion, what significance does tourism (i.e. overnight and day trips) generally have for the economy, labour market and leisure activities in **your place of residence**?*
Question: : *In your opinion, what significance does tourism (i.e. overnight and day trips) generally have for the economy, labour market and leisure activities in **Austria**?*

Analyses & results 2025 (4)

Number of tourists is too high for 6% of the population



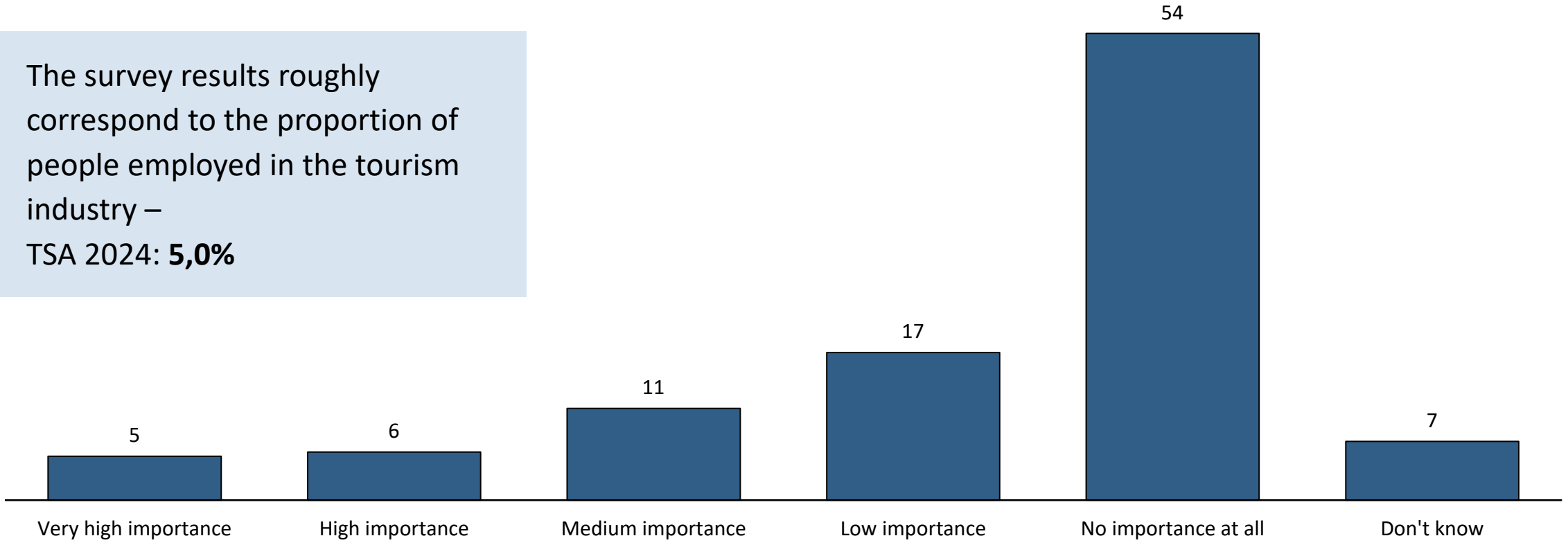
S: STATISTICS AUSTRIA, Tourism acceptance 2025. – Rounding errors were not corrected.
Question: *How do you personally feel about the number of tourists in **your place of residence**?*
Question: *How do you personally feel about the number of tourists in **Austria overall**?*

Analyses & results 2025 (5)

For 5% tourism is of very high economic importance

Perceived importance of tourism for one‘s own professional or financial situation – in percent

The survey results roughly correspond to the proportion of people employed in the tourism industry –
TSA 2024: **5,0%**



S: STATISTICS AUSTRIA, Tourism acceptance 2025, Tourism satellite accounts for Austria. – Rounding errors were not corrected.
Question: *What importance does tourism have for your professional or financial situation?*

Small Area Estimation Model (SAE) (1)
Tourism Acceptance Score per municipality

Based solely on the sample, only **federal province** results are possible

→ Development of an estimation model for municipality data (machine-learning)

Input data:

- **Perceived impact of tourism** in the place of residence (according to the survey)
- **Personal** data (gender, whether born in Austria, Austrian citizenship, federal province, education, age, income, occupation in tourism)
- **Municipality** data (average income of the municipality, employees and turnover in tourism per inhabitant & municipality, overnight stays and establishments according to accommodation statistics)

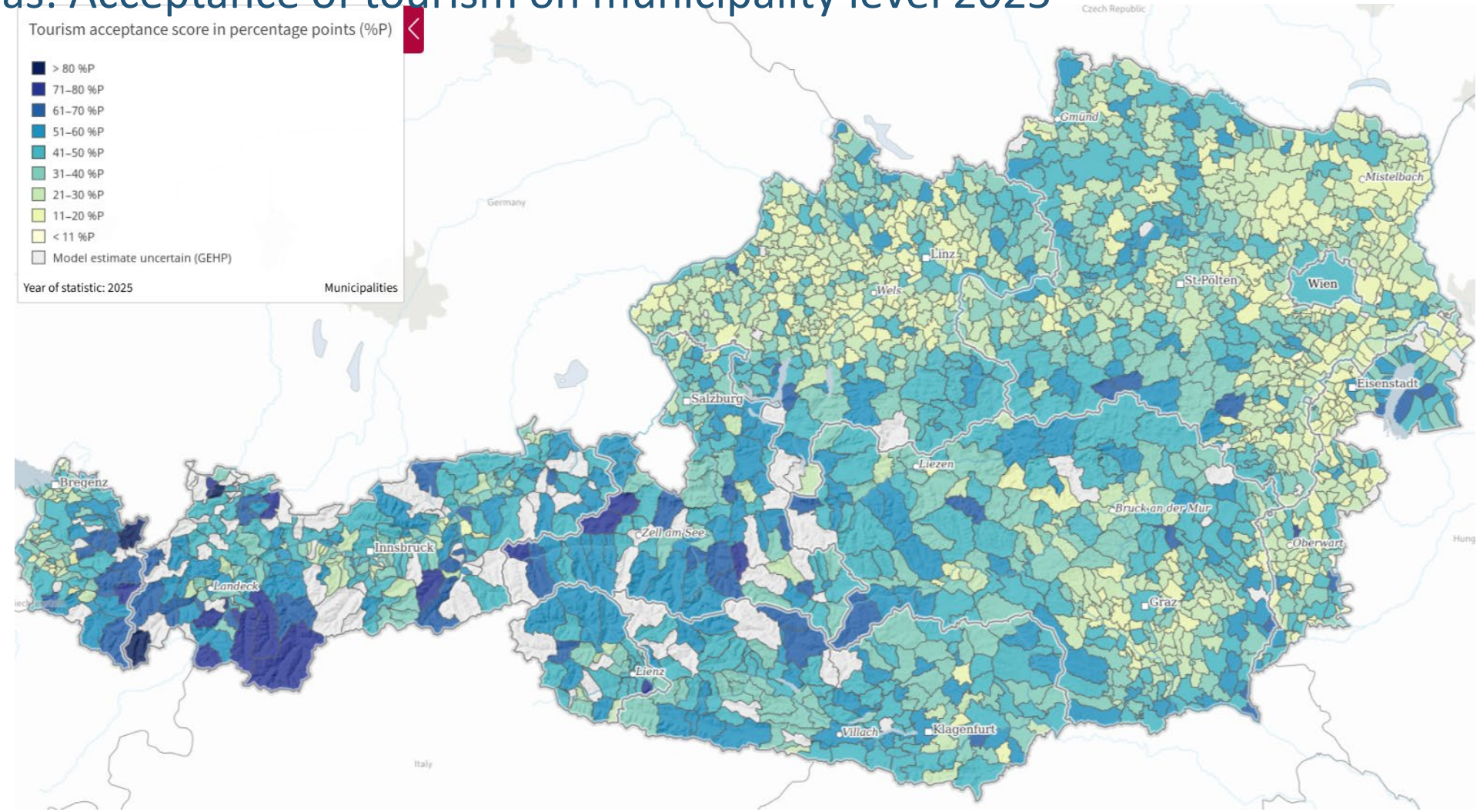
Estimation from responses from PERSONS NOT INCLUDED in the sample & aggregation at municipal level:

1. Share of persons who perceive the effects as **predominantly or rather positive**
2. Share of persons who perceive the effects as **predominantly or rather negative**
3. Share of persons who are **neutral about the effects**

→ Calculation of the **estimated Tourism Acceptance Score (TAS)** per municipality

Small Area Estimation Model (SAE) (2)

STATatlas: Acceptance of tourism on municipality level 2025



S: STATISTICS AUSTRIA, Tourism acceptance 2025. – Estimated Tourism Acceptance Score based on a Small Area Estimation Model.
Question: How do you personally rate the **impact of tourism on your place of residence**?

Conclusions



- **Example** for how tourism acceptance can be surveyed with few variables and **little additional effort and cost** since addendum to existing survey
  - ✓ First data collection on social sustainability on **legal basis**
    - → **transparency**
    - → **ongoing** and **stable data collection** allowing timeline evaluations
  - ✓ Good to have **leading institutions and best practices** to follow (e.g. German Institute for Tourism Research; https://www.di-tourismusforschung.de/en/; see e.g. here)

- **Outcome/first learnings:**
  - ✓ **Positive response** and feedback from the **population**
  - ✓ **Satisfied data users** (especially with the possibility of regional data by reweighting the sample)
  - ✓ Data for **2024 & 2025** shows a **stable tourism acceptance picture** within the Austrian population

- **AND: Not set in stone, evaluating continuously the feedback and the questionnaire!**

Please address queries to
Mr. Peter Laimer (peter.laimer@statistik.gv.at)
Ms. Rebecca Daul (rebecca.daul@statistik.gv.at)
Mr. Bernhard-Heinrich Peroutka (Bernhard-Heinrich.Peroutka@statistik.gv.at)

Further information related to the Survey:
https://www.statistik.at/en/statistics/tourism-and-transport/tourism/tourism-acceptance

STATISTICS AUSTRIA
Guglgasse 13, 1110 Vienna

statistik_at
statistics-austria
statistik.at
statistik_at
@statistik_austria

