Tourism in Austria reached record levels last year with 48.17 million tourist arrivals (domestic and international), and the number of overnight stays rose to 157.2 million, exceeding pre-pandemic levels in 2019 (152.7 million). This compares to 46.7 million visitors and 154.3 million overnight stays in 2024. Of this amount, more than half was spent in Tyrol and Salzburg (80.92 million nights). This year's winter season (November 2025–February 2026) saw a 5.5 per cent growth on the same period the previous year, with 54.25 million overnight stays.

City tourism, which was affected by the pandemic, has fully recovered, and Vienna and the provincial capitals reported a total of 29.05 million overnight stays in 2025, a 5.7 per cent increase on the previous year.

The most international tourists are arriving from Germany, followed by the Netherlands, Switzerland, and Liechtenstein. This small country has a lot to offer, with six national parks and 48 nature parks, 64,000km in hiking trails, 745 museums, 12 UNESCO sites, 23,700 hectares of ski slopes, and 75 thermal baths and health resorts.

There are 93,000 tourism and leisure industry businesses and just over 69,300 accommodation establishments in Austria, providing 1.14 million beds. Almost half of the beds are in Tyrol and Salzburg. Of this number, there are 11,240 hotels, of which 2,800 are four and five-star hotels – 513

are located in Salzburg and 894 in Tyrol. Vienna has just over 200 four and five-star hotels and boasts 26 luxury hotels, including the new Mandarin Oriental. There are around 4,450 three-star hotels, 3,154 one and two-star hotels, 12,000 commercial holiday dwellings, and 44,264 private accommodations.

Tourism contributes around 4.4 per cent to the GDP directly and employs around 220,000 people.

Total tourism expenditure (domestic and in-

The Last Waltz

With key monopoly licences due to expire in 2027 and long-awaited reform finally gathering pace, Austria finds itself at a pivotal moment. The government's proposed gambling framework promises to open the online market while introducing tougher player safeguards and a more independent regulatory structure.

Austria
Market Report

This report on Austria was researched and written entirely by a human, G3's Karen Carter, not by artificial intelligence. That distinction is important. Karen personally compiled the data, conducted interviews, reviewed official sources, and applied her extensive knowledge of gaming markets to build a detailed, balanced picture of Austria's gaming and economic landscape. Her human perspective ensures depth, accuracy, and context, qualities that no AI-generated text can truly replicate.

In 2019, Austria launched its 'Plan T – Master Plan for Tourism' strategy, which focuses on sustainable development, high-quality experiences, and digitalisation. This has since been updated, and a new tourism strategy, Vision T, is being implemented for the summer and looks at simplifying licensing procedures for hospitality startups, reducing red tape that hinders hotel refurbishments and event permits, and looking at the use of AI in tourism.

ternational) amounted to €38.8bn last year, of which international tourism receipts amounted to €24.3bn.

The average stay per visitor is three nights, and guests spend around €235 each on average during the summer and €253 in winter.

On the downside, there has been a sharp increase in prices in restaurants and accommodation, and guests are booking cheaper accommodation, whilst the energy crisis has put a strain on households and businesses. Many businesses are struggling with tight margins and supply chain costs.

In 2019, Austria launched its 'Plan T – Master Plan for Tourism' strategy, which focuses on sustainable development, high-quality experiences, and digitalisation to help secure its position as a leading global destination.

This has since been updated, and a new tourism strategy, Vision T, is being implemented for the summer and looks at simplifying licensing procedures for hospitality startups, reducing red tape that hinders hotel refurbishments and event permits, and looking at the use of AI in tourism.

It emphasises balancing tourism growth with the quality of life for Austrians and workforce development. The 2026 Vision T also introduces a €1m budget for marketing tied to the Milan-Cortina Winter Olympics.

Major events in Austria are expected to boost growth even further, with 50 large congress and corporate meetings scheduled this year, alongside the 2026 Eurovision Song Contest, which was held in May.

ECONOMY

After the last few years of recession, Austria is slowly emerging from its downward spiral and is projected to see some growth this year, although the war in the Middle East has affected energy prices.

The service industry accounts for roughly 70 per cent of Austria's GDP, with banking, finance, business, healthcare, education, and tourism all strong sectors. Austria exports more than 50 per cent of its economic output.

The recession has been attributed to a weak industrial sector, high energy costs, and reduced competitiveness.

GDP this year is expected to be around 0.5 per cent, rising to one per cent in 2027, whilst inflation will be reduced to around three per cent.

The Austrian economy is a market economy and has two distinctive features – a broad social system and the tradition of 'social partnerships.'

The Chamber of Labour (Arbeiterkammern) represents around four million Austrian workers and consumers. Membership is compulsory, and employees pay a small fee of 0.5 per cent from their gross wages.

The organisation was set up in 1920 after the collapse of the Austrian-Hungarian monarchy and provides help ranging from employment law to fitness contracts to promoting workers' interests through policy lobbying.

The group conducted more than 2.3 million consultations last year with 1.5 million cases to ensure fair wages and working conditions.

This is different from trade unions, such as the Austrian Trade Union Federation, which rely on voluntary memberships and ensure that the economic and social interests of market operators in Austria are taken into account.

Unemployment insurance is part of the compulsory social insurance system administered by the AMS (Public Employment Service), and the unemployment rate is around 7.5 per cent (March 2026), with 322,727 registered unemployed. This is a drop from 8.8 per cent at the beginning of the year – its highest level since March 2021.

After the 2024 elections, Austria saw its political stage shift to the far right after the Freedom Party secured the largest share of the votes.

In an unexpected turn of events, however, coalition talks failed, and instead, they were excluded from the government by the other parties, leading to a lengthy centrist coalition formation process.

Eventually, at the beginning of 2025, a new three-party coalition was sworn in, made up of the Austrian People's Party (OVP), Social Democrat Party of Austria (SPO) and the New Austria and Liberal Forum (NEOS) and headed by Christian Stocker, a small town lawyer who took on the role of chancellor after his predecessor resigned after the OVP's disappointing results in the election.

But with Austria suffering from high inflation, company closures, and mass layoffs, the government has a tough road ahead to keep the opinion polls from veering to the far right.

So, as the new government took office, widespread government spending cuts were introduced in March last year aimed at improving Austria's future. This came under the package 'Budget Restructuring Measures Act' to help deal with an excessive budget deficit and rising public debt after Austria's two-year recession, the longest downturn since the Second World War.

This included measures such as increased bank levies and the introduction of motor-related insurance tax for electric vehicles (they were previously exempt from tax).

Austria
Market Report

Austrian income tax has risen to 55 per cent for four years until 2029, while the zero VAT rate on photovoltaic systems has ended.

As part of Austria's fiscal consolidation plan, there were also implications for the gambling sector, which did not escape changes and saw an increase in the gaming tax on betting and online gaming, which came into force in April 2025.

Gambling tax for the online sector has increased from 40 to 45 per cent whilst betting tax was also increased from two to five per cent on betting stakes.

GAMBLING

Austria is preparing for a major reform of its gambling laws to bring an end to the monopoly situation, which has dominated the country, and bring in an online licensing system.

Talks have been circulating since the new three-party coalition entered government last year and although Austria has resisted change for years, reform is said to be imminent.

Currently, there is a single licence available in Austria for lotteries and online gambling. This is held by Austrian Lotteries' brand Win2day and the validity of the lottery licence is due to expire in September 2027, although this can be extended by up to one year.

Austrian Lotteries is a subsidiary of Casinos Austria, which holds the licences for all 12 land-based casinos – six of these landbased casino licences are due to expire in 2027 with the remaining in 2030.

Despite a leaked document in December last year supporting the status quo of a monopoly system, it seems, following widespread criticism, a draft proposal has since been put together with a different outlook as the gambling industry pushes for liberalisation. At the end of May it was announced that the Austrian Finance Ministry had finalised a draft law setting out the plans for future regulation, which included a move away from the current monopoly.

Capital:
Vienna
Total Area:
83,879 sq. km
Population:
9.22 million
Median age:
43.8 years
Religions:
Roman Catholic (55%), Muslim (8%), Eastern Orthodox (5%), Protestant, other Christian, no religion and other faiths
Languages:
German (official); recognised minority languages include Croatian, Slovenian and Hungarian
Ethnic Groups:
Austrian (majority), with significant communities of German, Turkish, Serbian, Romanian, Bosnian and other European origins
Currency:
Euro
Government type:
Federal Parliamentary Republic
Chief of State:
President Alexander Van der Bellen (since 2017; re-elected 2022)
Head of Government:
Federal Chancellor Christian Stocker (since 2025)
Elections:
President elected by direct popular vote for a six-year term (eligible for one consecutive re-election). The Federal Chancellor is appointed by the President and typically leads the party or coalition commanding a majority in the National Council.
Unemployment:
5.7%
Tourism:
48.17 million tourist arrivals (2025)

Austria is preparing for a major reform of its gambling laws to bring an end to the monopoly situation, which has dominated the country, and bring in an online licensing system. Talks have been circulating since the new three-party coalition entered government last year and although Austria has resisted change for years, reform is said to be imminent.

The proposal includes opening up the online gambling market to an uncapped number of licences, which would be available initially for five years, with the chance to extend by a further 10. It is anticipated that around 20 new licences will be granted in the initial opening.

The new licensing regime is likely to come with a high licensing fee, and it is suggested operators would require a minimum share capital of €10m, whilst they would also need to settle any outstanding Austrian court rulings and pay any back taxes before applying.

The licensing of multiple operators is expected to lead to a higher channelling rate, bring in more tax revenue, and improve oversight.

At the moment, the Austrian Association for Betting and Gambling (OVWG) reports a 35 per cent channelling rate for lotteries.

OVWG said: "As the Austrian association representing European licensed operators and a key driver of the shift towards modern licensing, we are confident that Austria is moving in the right direction. "A well-designed system must ensure that the regulated market is competitive and attractive. That is the foundation for channelling and protecting players, enabling innovation and building a sustainable and responsible market.

"All eyes are now on Austria. The decisions taken in the coming months will shape the market for years to come and are being closely followed across Europe. We see a real opportunity to build a strong, well-functioning market – and we are actively contributing to making that happen."

Many overseas operators hold an EU licence and already provide their online services illegally in Austria. It is said there are around 2,000 unlicensed platforms active in Austria.

PROPOSED CHANGES

Other proposed changes include uniform player protection standards for both online and landbased operators, 'age-dependent' loss limits, the creation of an independent gambling authority, and the introduction of payment and domain blocking. Currently, Austrian law does not contain provisions on the blocking of ISPs or payment service providers.

The player protection measures include limits on slot machine gambling and establishing a legal framework for loot boxes.

There is a proposed maximum online stake per game round limited to €2 with a maximum

Since 2017, the authority responsible for awarding licences has been the Tax Office for Fees, Transfer Taxes and Gambling, which comes under the Ministry of Finance. The supervisory body is the Federal Minister of Finance. One such proposed change is to establish a new independent authority to replace the BMF in 2030, which not only serves as the licensing authority but would also improve transparency.

payout of €2,000 – lower than the current €5,000 or €10,000 limits – plus a ban on jackpots.

Players under 26 would be limited to depositing €250 per week with an operator, whilst older players would see a maximum weekly deposit limit of €1,680 unless players prove 'sufficient liquidity.'

Players would also be required to take a mandatory 15-minute cooling-off break after 90 minutes of continuous play.

Between 2020 and 2023, almost 3,000 illegal slots were seized by the authorities. Some 3,500 administrative penalty proceedings were initiated for violations against the gambling act and €17m in fines were dished out.

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The state's 33 per cent share in CASAG is located in the BMF via the Austrian State Holding Company OBAG. Many feel this is a conflict of interest. The new gambling proposal was supposed to be on the table by the end of March to be processed before parliament's summer recess. However, it was delayed and it could be autumn before anything is finalised. The three coalition parties first need to agree on the draft before a parliamentary vote, which is expected to take place before summer recess in early July.

Many are in favour of an open licensing scheme, particularly for online gambling. And with the sole licence due to expire in 2027, the next tender process could be an open one. A partial opening with nine operators could generate an increase of €1bn in taxes whilst full liberalisation of 15

Sports betting is regulated at the level of the Bundesländer (regional government) whereby each state has its own local betting act and regulatory authority to oversee the sector. Likewise, slots operated outside of casinos are also regulated at the level of the Bundesländer by local authorities. Slots are not permitted in all states, although VLTs, which fall under the lottery monopoly, are permitted.

licences could see as much as €1.88bn.

A tender process can take around two years, so if changes are due to take place, then time is against the government.

GAMBLING LAW

Currently, gambling is regulated by the Law on Games of Chance (GSpG) and falls under the remit of the Ministry of Finance (BMF) and the Austrian Tax Office.

Sports betting is regulated at the level of the Bundesländer (regional government) whereby each state has its own local betting act and regulatory authority to oversee the sector. Likewise, slots operated outside of casinos are also regulated at the level of the Bundesländer by local authorities.

Slots are not permitted in all states, although VLTs, which fall under the lottery monopoly, are permitted.

At the end of 2024 there were almost 7,200 slot machines (in casinos, arcades and single sites) and VLTs distributed among two state concessionaires and six slot operators (state-approved) at 427 locations connected to the BRZ data centre.

LOTTERIES

Lotteries are operated under a monopoly licence held by Osterreichische Lotterien GmbH (OLG), the only lottery company ever licensed in Austria. The licence was last renewed in 2012 and expires in September 2027.

The main shareholders of the OLG include Casinos Austria (CASAG) with two-thirds and Lotto Toto Holding. In turn, Austria's state holding company OBAG holds a 33 per cent stake in Casinos Austria whilst CASAG is majority owned (60 per cent) by Czech investor Allwyn (formerly Sazka Group).

The lottery licence covers games such as Lotto, 6 out of 45, Euromillions, Toto, Number Lotto 1-90, Joker, and scratchcards. It also covers VLT outlets and 'electronic lotteries' which include all types of online games (except betting).

The lottery has just over 5,570 retail outlets across Austria and 3,000 Tipp3 sports betting outlets. The licence to establish a lottery is technically available to corporations established in the EU or EEA with a minimum share capital of €109m. In 2024, the lottery business saw €1.04bn GGR (€946.8m in 2023), the casinos saw a GGGR of €302.4m (€304.5m in 2023)

In 2023, Casinos Austria and Austrian Lotteries Group generated a GGR of €1.48bn up almost 4.5 per cent on the previous year. Of this, Casinos Austria saw €304.5m GGR; Casinos Austrian International saw €212.1m GGR and the lottery €946.8m. The group paid out €724m in taxes and duties.

VLTS

There are 20 WINWIN locations operated via a joint venture with Austrian Lotteries and Casinos Austria, operating between 12 and 50 terminals with 80-plus games.

The law states that VLTs operated in municipalities of more than 500,000 inhabitants must be a distance of 2km minimum between a VLT outlet with more than 15 machines and a casino. In small municipalities, the distance will be 15km. Tax is 30 per cent on Net Gaming Revenue (NGR).

ONLINE GAMBLING

Online gambling (electronic lotteries) comes under the monopoly licence operated by Austrian Lotteries via its win2day platform covering lottery games, casino games, poker, bingo, and sports betting. Tax is 45 per cent on GGR.

CASINOS

Casinos opened in Austria back in 1934 when Baden, Salzburg and Kitzbühel opened their doors. In 1967 Österreichische Spielbanken AG (renamed Casinos Austria in 1985) was established, and this company took over the operation of the casinos and has held the sole concession in Austria for casino operations ever since.

In 2010, the number of land-based casino licences granted was increased from 12 licences to 15. The existing 12 licences were divided into two 'packages' of six for city casino locations and rural casino locations and are found in Baden, Bregenz, Graz, Innsbruck, Kitzbuhel, Kleinwalsertal, Linz, Salzburg, Seefeld, Velden, Vienna and Zell am See. Six of the licences expire at the end of 2027, and the remaining in 2030.

The group operates a total of almost 200 gaming tables and just over 2,000 slots across the casinos in Austria. There are no restrictions on stakes or payouts in casinos. The casinos see around three million visitors annually.

At the time, three additional licences were granted by the BMF in a separate tender in 2014, but this was later cancelled by the Federal Administrative Court. Technically, there are 15 licences available.

The company also operates 12 gaming operations in eight countries via Casinos Austria International,

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SLOT MACHINES IN AUSTRIA 2024

STATE	Slots in Arcades	No. of Arcades	Slots in single sites	No. of single sites
LOWER AUSTRIA	1,403	88	-	-
UPPER AUSTRIA	726	51	450	160
CARINTHIA	463	26	-	-
BURGENLAND	110	10	126	47
STYRIA	1,012	74	-	-
TOTAL	3,714	249	576	207

which was founded in 1977 and is majority-owned by Allwyn Group.

A casino applicant must be a corporation established within the EU or EEA and the minimum share capital is €22m.

Tax is 30 per cent on GGR for table games and 30 per cent of NGR for slots.

BETTING

Betting is regulated at the Bundesländer level and varies in each state, and individual provinces are responsible for the regulation, supervision, and granting of licences. Generally, applicants have the right to be granted a betting licence after they fulfil certain legal requirements.

While some states allow only sports betting, others (such as Carinthia, Upper Austria, Vorarlberg, Salzburg, Styria and Tyrol) also allow social bets and some e-sports.

Most have restrictions on betting on certain events, including maximum stake limits or opening hours of betting shops.

Operators include Tipp3, which operates more than 3,000 retail outlets and has been operating since 2001, whilst Novomatic has almost 200 Admiral outlets in Austria.

Tax is five per cent on stakes for both online and offline betting.

SLOTS

Slots outside of casinos can be operated by applicants based in the EU or EEA. The operator must be a company with a supervisory board and registered office and fulfil certain stock capital requirements. Each Bundesländer decides whether to make licences for a single site or gaming halls available.

Currently, of the nine states in Austria, only six operate slots – Lower Austria, Upper Austria, Burgenland, Styria, Carinthia, and Salzburg (which began in January 2026).

Licences are issued for 15 years.

The law limits the maximum stake per game to €1 for single-site slots and €10 for those in arcades. Winnings are limited to a maximum of €1,000 and €10,000, respectively. No simultaneous games are permitted, and after two hours of playing, the machines must shut down automatically. Gaming halls can have between 10 and 50 machines, and between one and three are permitted in single-site locations (bars, restaurants).

There are three operating concessions permitted per state, and a restriction of a maximum of one machine per 1,200 inhabitants.

In , there were a total of 4,290 slots of which 3,714 were operated in 249 gaming arcades, and 576 were operated in 207 single sites.

The operators include Admiral, Excellent Entertainment, PA Entertainment and Automaten, Amatic, Fair Games, and PG Enterprise. Admiral, for example, operates around 2,250 gaming devices in Austria. Tax rate is 11 per cent on net gaming revenue plus municipal fees.