Tourism in Austria

Part I: from old to new tourism
Part II: small family tourism businesses

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PART I: From the „Old Tourism“ to the „New Tourism“

Structure:

1. International Tourism Trends
2. Changing Consumer Behaviour
3. The New Tourism Challenges

1. International Tourism Trends

- Arrivals
- Market Shares
- Forecasts
- Small Enterprises

International Tourist Arrivals

	Million 1999		*Growth rate (%) 1999/1998*	*2000/1999*	*Forecast 2010*	*2020*	*Growth Rate (%) 1995-2020*
WORLD	650.4	698.8	3.8	7.4	1006.4	1561.1	4.1
Africa	122.2	27.6	6.4	4.4	47.0	77.3	5.5
Americas	97.6	129.0	2.3	5.5	190.4	282.3	3.9
East Asia / Pacific	380.2	111.9	10.8	14.7	195.2	397.2	6.5
Europe	18.2	403.3	1.7	6.1	527.3	717.0	3.0
Midle East	5.8	20.6	20.3	12.9	35.9	68.5	7.1
South Asia		6.4	10.7	11.0	10.6	18.8	6.2

Source: WTO, Tourism Highlights 2001

Market Share on International Tourist Arrivals

	Market share (%) 1999	2000	Forecast 2020
WORLD	100.0	100.0	100.0
Africa	4.1	4.0	5.0
Americas	18.8	18.5	18.1
East Asia / Pacific	15.0	16.0	25.4
Europe	58.5	57.7	45.9
Middle East	2.8	2.9	4.4
South Asia	0.9	0.9	1.2

Source: WTO, Tourism Highlights 2001

World's Top Tourist Destinations

Rank	Nation	International Tourist Arrivals (million) 1999	2000	Change % 2000/1999	Market share % 2000
1	France	73.0	75.5	3.4	10.8
2	United States	48.5	50.9	4.9	7.3
3	Spain	46.8	48.2	3.0	6.9
4	Italy	36.5	41.2	12.8	5.9
5	China	27.0	31.2	15.5	4.5
6	United Kingdom	25.4	25.2	-0.8	3.6
7	Russian Federation	18.5	21.2	14.5	3.0
8	Mexico	19.0	20.6	8.4	3.0
9	Canada	19.5	20.4	4.9	2.9
10	Germany	17.1	19.0	10.9	2.7
11	Austria	17.5	18.0	2.9	2.6
12	Poland	18.0	17.4	-3.1	2.5
13	Hungary	14.4	15.6	8.1	2.2
14	Hong Kong (China)	11.3	13.1	15.3	1.9
15	Greece	12.2	12.5	2.8	1.8

Source: WTO, Tourism Highlights 2001

World' Top Tourism Earners

Rank	Nation	International Tourism Receipts (US $ billion) 1999	2000	Change % 2000/1999	Market share % 2000
1	United States	74.9	85.2	13.7	17.9
2	Spain	32.4	31.0	-4.3	6.5
3	France	31.5	29.9	-5.1	6.3
4	Italy	28.4	27.4	-3.2	5.8
5	United Kingdom	20.4	19.5	-3.4	4.1
6	Germany	16.7	17.8	6.5	3.7
7	China	14.1	16.2	15.1	3.4
8	Austria	12.5	11.4	5.0	2.4
9	Canada	10.2	10.8	5.3	2.3
10	Greece	8.8	9.2	14.8	1.9
11	Australia	8.0	8.4	9.4	1.8
12	Mexico	7.2	8.3	46.8	1.7
13	Hong Kong (China)	7.2	7.9	9.4	1.7
14	turkey	5.2	7.6	46.8	1.6
15	Russian Federation	7.5	-	-	-

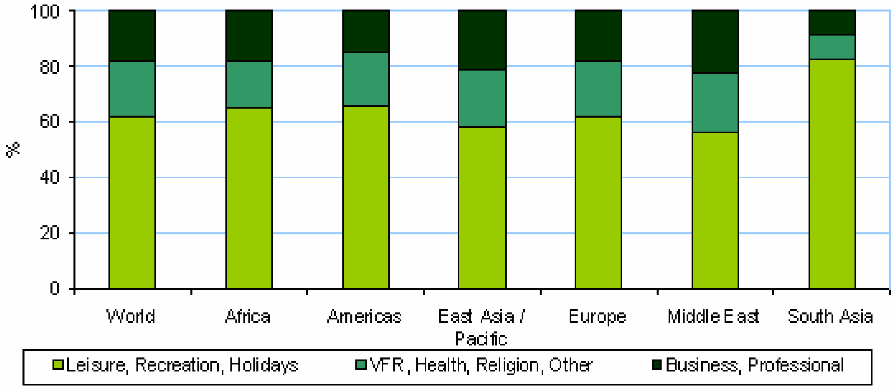
Source: WTO, Tourism Highlights 2001

World's Top Tourism Spenders (Consumption)

Rank	Nation	International Tourism Expenditure (US $ billion) 1999	2000	Change % 2000/1999	Market share % 2000
1	United States	59.4	65.0	9.6	13.7
2	Germany	48.5	47.6	-1.8	10.0
3	United Kingdom	35.6	36.6	2.6	7.7
4	Japan	32.8	31.5	-4.0	6.6
5	France	18.6	17.2	-7.9	3.6
6	Italy	16.9	15.5	-8.6	3.2
7	Canada	11.3	12.4	9.4	2.6
8	Netherlands	11.4	11.8	4.0	2.5
9	China	10.9	-	-	-
10	Belgium / Luxembourg	10.1	-	-	-
11	Austria	9.8	9.3	-5.6	1.9
12	Sweden	7.6	-	-	-
13	Russian Federation	7.4	-	-	-
14	Republic of Korea	4.0	6.4	60.4	1.3
15	Switzerland	6.8	6.3	-7.8	1.3

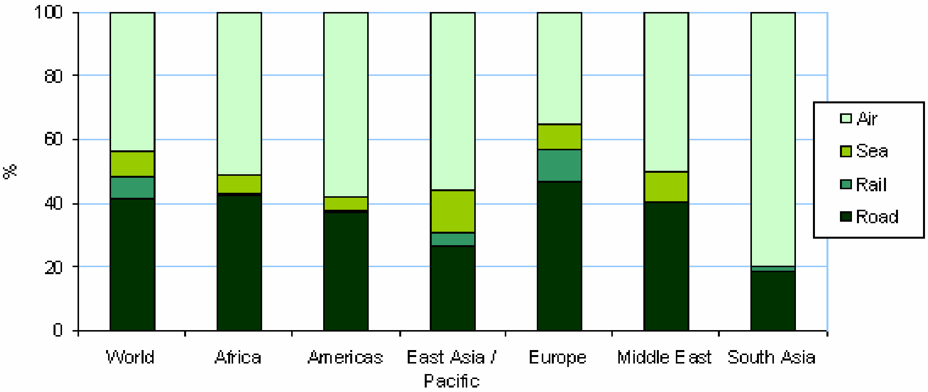
Source: WTO, Tourism Highlights 2001

International Tourism by Purpose of Visit, 1998



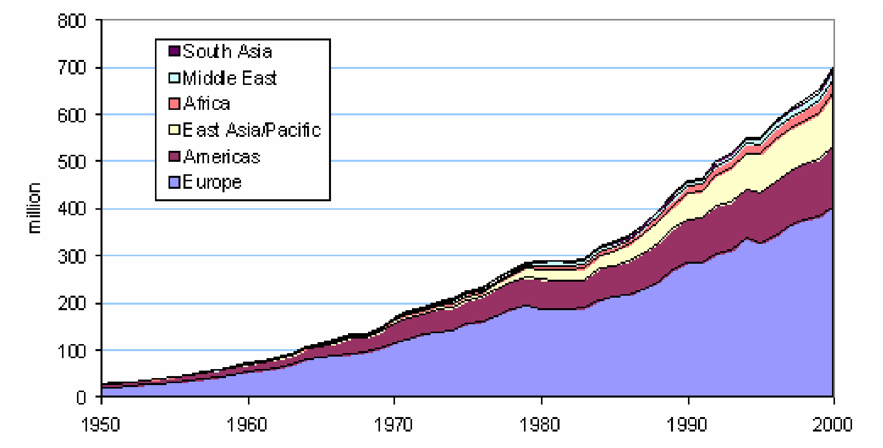
Source: WTO, Facts and Figures

International Tourism by Mode of Transport, 1998



Source: WTO, Facts and Figures

International Tourist Arrivals, 1950 - 2000



Average Number of Beds 1994-1998

(Source: Eurostat 2000)

Country	*Average No. of beds 1994*	*Average No. of beds 1998*	*Growth*
EU	46.0	48.8	6.0 %
Austria	35.3	37.0	4.8 %
France	70.2	74.2	5.6 %
Italy	49.9	52.4	5.0 %
Spain	104.6	130.0	24.3 %
Sweden	93.8	97.8	4.1 %

MITARBEITER IM BEHERBERGUNGS- UND GASTSTÄTTENWESEN

Betriebsstruktur nach Beschäftigten (Leistungs- und Strukturerhebung 2001)

		Beschäftigte am 31.12.2001	
Anzahl der Unternehmen	Anzahl der Beschäftigten	insgesamt	davon Unselbstständig
27.860	1-4	58.617	26.878
6.668	5-9	43.407	35.127
2.570	10-19	34.566	31.301
1.228	20-49	35.624	34.492
253	50-99	17.656	17.427
77	100-249	G	G
16	250-499	5.992	5.991
6	500-999	G	G
1	1.000 und mehr	G	G
38.680		**211.671**	**166.984**

In dieser Gliederung nur für 2001 verfügbar.

Quelle: Statistik Austria

Arbeitnehmer nach Bundesländern insgesamt *)

	1998	1999	2000	2001	2002	2003	2004
Burgenland	4.360	4.496	4.697	4.789	5.014	5.214	5.157
Kärnten	16.239	16.580	16.496	16.447	16.877	16.858	17.087
Niederösterreich	20.515	20.703	21.176	21.292	21.165	21.130	21.263
Oberösterreich	16.898	17.169	17.434	17.597	18.042	18.176	18.323
Salzburg	19.143	19.623	19.846	20.031	20.341	19.823	21.031
Steiermark	16.705	17.463	17.974	18.266	18.767	19.278	19.429
Tirol	30.062	30.875	30.850	30.772	30.995	32.145	32.632
Vorarlberg	8.127	8.244	8.310	8.433	8.749	8.830	8.949
Wien	31.273	31.875	32.023	32.773	33.693	32.488	33.095
Insgesamt	163.322	167.028	168.806	170.400	173.643	173.942	176.966

*)Stand Juli

Ausländische Arbeitnehmer nach Bundesländern*)

	1998	1999	2000	2001	2002	2003	2004*)
Burgenland	1.231	1.312	1.459	1.549	1.736	1.872	1.974
Kärnten	2.840	2.937	3.077	3.140	3.290	3.445	3.675
Niederösterreich	4.363	4.545	4.738	4.898	4.897	4.928	5.089
Oberösterreich	3.326	3.383	3.422	3.649	3.900	4.303	4.328
Salzburg	5.638	5.687	5.883	6.120	6.168	6.082	6.553
Steiermark	2.209	2.365	2.526	2.673	2.867	3.192	3.321
Tirol	8.229	8.252	8.330	8.649	9.767	10.889	11.379
Vorarlberg	2.678	2.711	2.768	2.949	3.153	3.410	3.522
Wien	11.005	11.173	11.570	12.486	12.635	12.578	13.099
Insgesamt	41.604	42.457	43.885	46.216	48.563	50.897	53.181

Stand Juli; Die Addition der Bundesländer ergibt ab 1998 eine andere Anzahl an Arbeitnehmern als die Gesamtsumme, da diese Arbeitnehmer nicht eindeutig einem Bundesland zuordenbar sind.

Quelle: Hauptverband der Sozialversicherungsträger

ENTWICKLUNG DES TOURISMUS IN ALLEN UNTERKUNFTSARTEN IN ÖSTERREICH

	Übernachtungen						Ankünfte		Aufent-haltsdauer	Betten-ausl.	Devisen-einnahmen	
	Inländer	%	Ausländer	%	insgesamt	%	insgesamt	%	in Tagen	in %	in Mio. Euro*)	%
1982	28.439.625	-0,6	89.954.002	-2,8	118.393.627	-2,3	19.604.363	+ 0,4	6,04	23,8	6.903	+ 4,4
1983	28.349.064	-0,3	87.444.481	-2,8	115.793.545	-2,2	19.913.775	+ 1,6	5,81	23,2	6.857	- 0,7
1984	27.912.388	-1,5	86.713.254	-0,8	114.625.642	-1,0	20.553.424	+ 3,2	5,58	22,8	7.339	+ 7,0
1985	27.510.383	-1,4	85.075.850	-1,9	112.586.233	-1,8	20.618.339	+ 0,3	5,46	24,1	7.643	+ 4,1
1986	28.228.001	+ 2,6	85.393.345	+ 0,4	113.621.346	+ 0,9	20.710.464	+ 0,4	5,49	23,2	7.716	+ 1,0
1987	27.993.212	- 0,8	85.692.004	+ 0,3	113.685.216	+ 0,1	21.449.470	+ 3,6	5,30	23,5	8.140	+ 5,5
1988	28.137.094	0,5	87.575.147	+ 2,2	115.712.241	+ 1,8	22.448.361	+ 4,7	5,15	23,9	9.055	+ 11,2
1989	28.815.649	+ 2,4	94.968.537	+ 8,4	123.784.186	+ 7,0	24.341.595	+ 8,4	5,09	25,6	10.301	+ 13,8
1990	28.841.188	+ 0,1	94.788.290	-0,2	123.629.478	-0,1	25.257.414	+ 3,8	4,89	25,8	11.078	+ 7,5
1991	30.431.251	+ 5,5	99.641.548	+ 5,1	130.072.799	+ 5,2	25.737.088	+ 1,9	5,05	27,3	11.713	+ 5,7
1992	30.658.674	+ 0,7	99.757.595	+ 0,1	130.416.269	+ 0,3	25.834.385	+ 0,4	5,05	27,3	11.602**)	+ 3,4
1993	30.215.994	- 1,4	96.826.821	- 2,9	127.039.815	- 2,6	24.988.674	- 3,3	5,08	26,9	11.448	- 1,3
1994	30.143.448	- 0,2	92.216.429	- 4,8	122.359.877	- 3,7	24.779.815	- 0,8	4,94	25,9	10.914	- 4,7
1995	30.123.062	- 0,1	86.991.456	- 5,7	117.114.518	- 4,3	24.175.214	- 2,4	4,84	24,9	10.687	- 2,1
1996	28.719.003	- 4,7	84.217.315	- 3,2	112.936.318	- 3,6	24.095.495	- 0,3	4,69	24,5	10.717	+ 0,3
1997	28.503.855	- 0,7	80.561.625	- 4,3	109.065.480	- 3,4	23.859.838	- 1,0	4,57	23,9	10.863	+ 1,4
1998	29.289.827	+2,8	81.866.829	+1,6	111.156.656	+1,9	24.951.599	+4,6	4,45	24,7	11.357	+ 4,5
1999	30.309.286	+3,5	82.423.754	+0,7	112.733.040	+1,4	25.456.443	+2,0	4,43	25,2	11.771	+ 3,6
2000	31.152.838	+2,8	82.533.652	+0,1	113.686.490	+0,8	26.377.987	+3,6	4,31	25,6	12.360	+ 5,0
2001	31.441.815	+0,9	83.668.870	+1,4	115.110.685	+1,3	26.894.040	+2,0	4,28	26,3	13.400	+ 8,4
2002	31.012.794	-1,4	85.791.658	+2,5	116.804.452	+1,5	27.359.922	+1,7	4,27	26,6	13.907	+ 3,8
2003	31.618.992	+2,0	86.347.992	+0,6	117.966.984	+1,0	28.133.763	+2,8	4,19	26,7	14.648	+ 5,3
2004	31.326.173	-0,9	85.917.026	-0,5	117.243.199	-0,6	28.463.020	+1,2	4,12	26,4	14.921	+ 1,9

*) Deviseneinnahmen gem. Zahlungsbilanzstatistik plus Banknotenmitnahme von Privatpersonen ins Ausland u. nach Österreich.
**)Ab 1992 bereinigt um Rückwechslung v. Reiseverkehrsvaluten u. Banknoten-Mitnahmen österr. Pendler. 1993:geschätzter Wert
Die Bettenauslastung (Betten im Sommer) wurde für 365 bzw. 366 Tage (Betten inkl. Notbetten und Matratzenlager) berechnet.
Quelle: Statistik Austria; Aufenthaltsdauer und Auslastung eigene Berechnung.

ÜBERNACHTUNGEN

Übernachtungen in allen Unterkunftsarten

	1999	2000	%	2001	%	2002	%	2003	%	2004	%
Inländer	30.309.286	31.152.838	+2,8	31.441.815	+0,9	31.012.794	-1,4	31.618.992	+2,0	31.326.173	-0,9
Ausländer	82.423.754	82.533.652	+0,1	83.668.870	+1,4	85.791.658	+2,5	86.347.992	+0,6	85.917.026	-0,5
Insgesamt	**112.733.040**	**113.686.490**	+0,8	**115.110.685**	+1,3	**116.804.452**	+1,5	**117.966.984**	+1,0	**117.243.199**	-0,6
Hotels und ähnl. Betr.	70.364.350	71.648.851	+1,8	72.553.523	+1,3	73.523.474	+1,3	73.867.683	+0,5	74.007.395	+0,2
Kurheime	3.077.088	3.104.286	+0,9	3.045.865	-1,9	3.054.391	+0,3	3.013.246	-1,3	3.065.120	+1,7
Camping	4.861.853	4.603.008	-5,3	4.864.264	+5,7	5.019.008	+3,2	5.522.271	+10,0	5.203.185	-5,8
übrige	10.994.097	11.354.481	+3,3	11.673.906	+2,8	12.173.816	+4,3	12.836.450	+5,4	12.974.306	+1,1
Priv.quartiere	11.176.345	10.703.093	-4,2	10.391.933	-2,9	10.160.844	-2,2	9.741.260	-4,1	9.139.598	-6,2
Ferienwohn. privat	12.259.307	12.272.771	+0,1	12.581.194	+2,5	12.872.919	+2,3	12.986.074	+0,9	12.853.595	-1,0

Quelle: Statistik Austria

Gesamtübernachtungen nach Bundesländern

	1999	2000	%	2001	%	2002	%	2003	%	2004	%
Bgld.	2.346.107	2.435.530	+3,8	2.435.796	+0,0	2.470.399	+1,4	2.473.128	+0,1	2.390.861	-3,3
Ktn.	13.066.330	12.830.532	-1,8	13.012.209	+1,4	13.357.631	+2,7	13.478.598	+0,9	12.900.001	-4,3
NÖ.	5.662.558	5.726.747	+1,1	5.643.673	-1,5	5.432.264	-3,7	5.620.386	+3,5	5.825.455	+3,6
OÖ.	6.773.372	6.718.892	-0,8	6.631.529	-1,3	6.531.196	-1,5	6.555.362	+0,4	6.524.578	-0,5
Sbg.	21.065.494	20.955.580	-0,5	21.532.004	+2,8	22.009.935	+2,2	21.975.661	-0,2	22.178.660	+0,9
Stmk.	9.377.186	9.441.972	+0,7	9.701.579	+2,7	9.831.174	+1,3	9.943.730	+1,1	9.545.089	-4,0
Tirol	39.197.241	40.111.399	+2,3	40.644.247	+1,3	41.645.214	+2,5	42.035.780	+0,9	41.526.813	-1,2
Vbg.	7.693.394	7.761.507	+0,9	7.838.065	+1,0	7.902.713	+0,8	7.942.144	+0,5	7.920.200	-0,3
Wien	7.551.358	7.704.331	+2,0	7.671.583	-0,4	7.623.926	-0,6	7.942.195	+4,2	8.431.542	+6,2
Insg.	**112.733.040**	**113.686.490**	**+0,8**	**115.110.685**	**+1,3**	**116.804.452**	**+1,5**	**117.966.984**	**+1,0**	**117.243.199**	**-0,6**

Quelle: Statistik Austria

Die Übernachtungsergebnisse der 50 wichtigsten Tourismusgemeinden Österreichs im Winterhalbjahr 2003/04

	Gemeinden	Inländer-übern.	Ausländer-übern.	Kumulierte*) Werte der Ausländer-übernachtungen absolut	Kumulierte Werte in %	Gesamt-übern. im Winter 2003/04	Kumulierte Werte der Gesamtübernachtungen im Winter 2003/04 absolut	Kumulierte Werte in %
1	Wien	685.980	2.772.329	2.772.329	6,2	3.458.309	3.458.309	6,0
2	Sölden	78.232	1.725.808	4.498.137	10,1	1.804.040	5.262.349	9,1
3	Saalbach-Hinterglemm	290.286	1.029.258	5.527.395	12,4	1.319.544	6.581.893	11,3
4	Ischgl	90.823	1.131.182	6.658.577	14,9	1.222.005	7.803.898	13,4
5	St Anton/Arlberg	114.357	821.520	7.480.097	16,7	935.877	8.739.775	15,0
6	Lech	150.030	706.513	8.186.610	18,3	856.543	9.596.318	16,5
7	Mittelberg	2.618	835.941	9.022.551	20,2	838.559	10.434.877	18,0
8	Neustift/Stubaital	17.431	799.202	9.821.753	22,0	816.633	11.251.510	19,4
9	Mayrhofen	35.149	747.538	10.569.291	23,6	782.687	12.034.197	20,7
10	Zell/See	87.868	649.607	11.218.898	25,1	737.475	12.771.672	22,0
11	Salzburg	200.030	498.898	11.717.796	26,2	698.928	13.470.600	23,2
12	Bad Gastein	220.279	448.457	12.166.253	27,2	668.736	14.139.336	24,3
13	Serfaus	23.459	624.640	12.790.893	28,6	648.099	14.787.435	25,5
14	Bad Hofgastein	296.474	331.630	13.122.523	29,3	628.104	15.415.539	26,5
15	Tux	22.392	593.502	13.716.025	30,7	615.894	16.031.433	27,6
16	Flachau	155.102	437.506	14.153.531	31,7	592.608	16.624.041	28,6
17	Seefeld/Tirol	19.241	511.475	14.665.006	32,8	530.716	17.154.757	29,5
18	Innsbruck	127.261	375.937	15.040.943	33,6	503.198	17.657.955	30,4
19	Kirchberg/Tirol	87.578	414.128	15.455.071	34,6	501.706	18.159.661	31,3
20	Bad Kleinkirchheim	150.741	327.452	15.782.523	35,3	478.193	18.637.854	32,1
21	Fiss	12.075	457.627	16.240.150	36,3	469.702	19.107.556	32,9
22	Hermagor-Pressegger See	219.552	232.469	16.472.619	36,8	452.021	19.559.577	33,7
23	Wagrain	118.884	331.124	16.803.743	37,6	450.008	20.009.585	34,4
24	Untertauern	127.103	316.150	17.119.893	38,3	443.253	20.452.838	35,2
25	Kaprun	53.437	375.752	17.495.645	39,1	429.189	20.882.027	35,9

*) Aufsummierung der Ausländerübernachtungen

Ankünfte in allen Unterkunftsarten

	1998	1999	%	2000	%	2001	%	2002	%	2003	%
Inländer	7.596.535	7.989.729	+ 5,2	8.395.783	+ 5,1	8.713.961	+ 3,8	8.748.997	+ 0,4	9.056.133	+ 3,5
Ausländer	17.355.064	17.466.714	+ 0,6	17.982.204	+ 3,0	18.180.079	+ 1,1	18.610.925	+ 2,4	19.077.630	+ 2,5
Insgesamt	**24.951.599**	**25.456.443**	+ 2,0	**26.377.987**	+ 3,6	**26.894.040**	+ 2,0	**27.359.922**	+ 1,7	**28.133.763**	+ 2,8
Hotels und ähnl. Betriebe	18.104.660	18.375.077	+ 1,5	19.195.884	+ 4,5	19.540.342	+ 1,8	19.772.367	+ 1,2	20.185.170	+ 2,1
Kurheime	201.150	197.193	- 2,0	202.503	+ 2,7	202.494	- 0,0	214.467	+ 5,9	203.853	- 4,9
Camping	975.788	944.160	- 3,2	911.503	- 3,5	963.527	+ 5,7	1.001.164	+ 3,9	1.163.662	+ 16,2
übrige	2.068.736	2.260.197	+ 9,3	2.339.403	+ 3,5	2.432.505	+ 4,0	2.574.279	+ 5,8	2.781.033	+ 8,0
Privatquartiere	2.060.217	2.060.118	- 0,0	2.044.337	- 0,8	2.022.643	- 1,1	2.010.421	- 0,6	1.975.722	- 1,7
Ferienwohnung privat	1.541.048	1.619.698	+ 5,1	1.684.357	+ 4,0	1.732.529	+ 2,9	1.787.224	+ 3,2	1.824.323	+ 2,1

Quelle: Statistik Austria

Ankünfte in allen Unterkunftsarten nach Bundesländern

	1998	1999	%	2000	%	2001	%	2002	%	2003	%
Bgld.	516.143	560.910	+ 8,7	608.989	+ 8,6	618.453	+ 1,6	641.792	+ 3,8	674.457	+ 5,1
Ktn.	2.225.607	2.186.955	- 1,7	2.256.402	+ 3,2	2.341.644	+ 3,8	2.426.576	+ 3,6	2.527.510	+ 4,2
N.Ö.	1.761.003	1.788.504	+ 1,6	1.829.820	+ 2,3	1.865.775	+ 2,0	1.825.309	- 2,2	1.941.076	+ 6,3
O.Ö.	1.831.445	1.913.991	+ 4,5	1.946.156	+ 1,7	1.998.066	+ 2,7	1.981.172	- 0,8	2.021.974	+ 2,1
Sbg.	4.247.220	4.425.662	+ 4,2	4.532.048	+ 2,4	4.659.851	+ 2,8	4.750.920	+ 2,0	4.863.282	+ 2,4
Stmk.	2.250.763	2.341.068	+ 4,0	2.394.492	+ 2,3	2.533.168	+ 5,8	2.614.448	+ 3,2	2.735.002	+ 4,6
Tirol	7.381.281	7.500.870	+ 1,6	7.875.620	+ 5,0	7.943.602	+ 0,9	8.171.157	+ 2,9	8.252.254	+ 1,0
Vbg.	1.584.965	1.605.733	+ 1,3	1.668.741	+ 3,9	1.683.555	+ 0,9	1.728.314	+ 2,7	1.771.804	+ 2,5
Wien	3.153.172	3.132.750	- 0,6	3.265.719	+ 4,2	3.249.926	- 0,5	3.220.234	- 0,9	3.346.404	+ 3,9
Insg.	**24.951.599**	**25.456.443**	**+ 2,0**	**26.377.987**	**+ 3,6**	**26.894.040**	**+ 2,0**	**27.359.922**	**+ 1,7**	**28.133.763**	**+ 2,8**

Quelle: Statistik Austria

Ankünfte nach Herkunftsländern und Aufenthaltsdauer

	2000	2001	%	2002	%	2003	%	2004	%	Aufenthalts-dauer i. Tagen
Ausland insgesamt	**17.982.204**	**18.180.079**	**+1,1**	**18.610.925**	**+2,4**	**19.077.630**	**+2,5**	**19.372.816**	**+1,5**	
1. Deutschland	9.990.133	10.144.870	+1,5	10.349.377	+2,0	10.467.992	+1,1	10.254.991	-2,0	4,97
2. Niederlande	1.185.856	1.238.240	+4,4	1.350.212	+9,0	1.418.402	+5,1	1.425.605	+0,5	5,93
3. Italien	911.030	964.248	+5,8	995.182	+3,2	1.089.554	+9,5	1.100.564	+1,0	2,78
4. Schweiz	736.877	778.596	+5,7	817.382	+5,0	888.378	+8,7	895.601	+0,8	3,98
5. Ver. Königreich	666.616	645.513	-3,2	684.839	+6,1	662.739	-3,2	721.930	+8,9	4,74
6. USA	781.455	639.271	-18,2	512.384	-19,8	484.651	-5,4	545.945	+12,6	2,60
7. Frankreich	386.828	385.296	-0,4	406.251	+5,4	436.088	+7,3	469.131	+7,6	3,70
8. Belgien	349.391	360.203	+3,1	374.183	+3,9	391.463	+4,6	400.965	+2,4	5,66
9. Ungarn	215.343	234.552	+8,9	247.772	+5,6	286.649	+15,7	325.426	+13,5	3,53
10. Tschech.Rep.	204.154	223.352	+9,4	226.282	+1,3	265.139	+17,2	295.125	+11,3	3,53
11. Japan	293.728	255.162	-13,1	240.146	-5,9	222.275	-7,4	256.451	+15,4	
12. Spanien	196.240	195.042	-0,6	183.220	-6,1	193.258	+5,5	225.061	+16,5	
13. Dänemark	186.306	201.673	+8,2	207.338	+2,8	213.970	+3,2	221.119	+3,3	
14. Polen	182.268	186.524	+2,3	193.430	+3,7	184.560	-4,6	174.061	-5,7	
15. China								172.361		
16. Schweden	172.044	163.425	-5,0	160.838	-1,6	157.280	-2,2	163.646	+4,0	
17. GUS**)	102.209	122.531	+19,9	142.199	+16,1	149.012	+4,8	148.695	-0,2	
18. Australien	116.004	100.026	-13,8	88.157	-11,9	74.251	-15,8	117.353	+58,0	
19. Kroatien	68.506	71.155	+3,9	70.335	-1,2	70.335	+0,0	78.893	+12,2	
20. Kanada	68.655	65.604	-4,4	64.724	-1,3	65.949	+1,9	72.534	+10,0	
21. Slowenien	61.501	58.353	-5,1	62.833	+7,7	68.139	+8,4	72.293	+6,1	
22. Slowakei	46.577	50.045	+7,4	49.381	-1,3	54.892	+11,2	66.146	+20,5	
23. Griechenland	54.717	60.217	+10,1	61.774	+2,6	66.726	+8,0	65.989	-1,1	
24. Finnland	50.011	55.288	+10,6	52.936	-4,3	53.132	+0,4	59.883	+12,7	
25. Israel	62.621	64.452	+2,9	52.419	-18,7	53.396	+1,9	52.675	-1,4	
26. Norwegen	47.367	48.162	+1,7	53.400	+10,9	51.404	-3,7	50.486	-1,8	
27. Republik Irland	26.219	32.798	+25,1	36.053	+9,9	39.666	+10,0	49.930	+25,9	
28. Südkorea	23.636	23.789	+0,6	27.876	+17,2	41.328	+48,3	46.181	+11,7	
29. Luxemburg	30.756	32.347	+5,2	34.509	+6,7	39.809	+15,4	41.904	+5,3	
30. Jugoslawien	28.247	28.555	+1,1	30.524	+6,9	28.065	-8,1	28.915	+3,0	
übriges Ausland*)	736.909	750.790		834.969		859.128		772.957		

*)nicht mit den Vorjahren vergleichbar.
**)GUS, übrige GUS, Russland und Ukraine

Quelle: Statistik Austria

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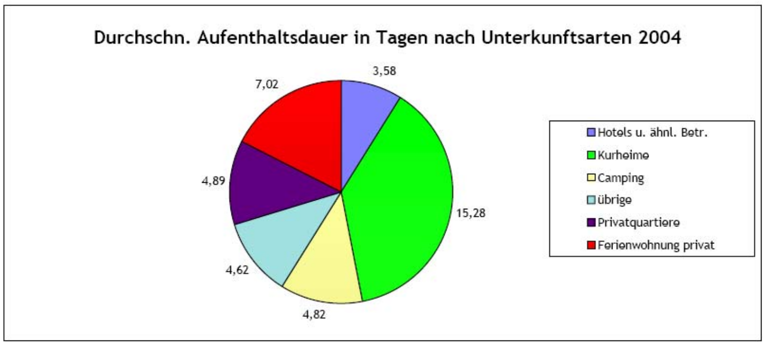
Durchschnittliche Aufenthaltsdauer in Tagen

	1997	1998	1999	2000	2001	2002	2003	2004
Inländer	3,95	3,86	3,79	3,71	3,61	3,54	3,49	3,45
Ausländer	4,84	4,72	4,72	4,59	4,60	4,61	4,53	4,43
insgesamt	4,57	4,45	4,43	4,31	4,28	4,27	4,19	4,12
Hotels u. ähnl. Betr.	4,00	3,87	3,83	3,73	3,71	3,72	3,66	3,58
Kurheime	14,72	15,15	15,61	15,33	15,04	14,24	14,78	15,28
Camping	4,98	4,93	5,15	5,05	5,05	5,01	4,75	4,82
übrige	4,17	3,17	4,87	4,85	4,80	4,73	4,62	4,62
Privatquartiere	5,84	5,57	5,43	5,24	5,14	5,05	4,93	4,89
Ferienwohnung privat	8,06	7,81	7,57	7,29	7,26	7,20	7,12	7,02

Quelle: Statistik Austria



BETTENAUSLASTUNG

Bettenauslastung nach Unterkunftsarten (in %)

1. Winter (1. Nov. bis 30. Apr.) 181 bzw. 182 Tage

Winter	gew.	Kur- und Erholungsheime	übrige Fremdenunterkünfte	privat	insg.
1985/86	28,8	54,9	25,1	16,5	**25,3**
1986/87	28,9	53,2	25,0	16,9	**25,6**
1987/88	28,9	53,3	24,6	17,3	**25,7**
1988/89	30,0	50,5	25,9	18,3	**26,8**
1989/90	29,6	48,4	24,6	17,0	**26,2**
1990/91	30,6	54,6	25,4	18,8	**27,4**
1991/92	31,4	56,2	24,8	18,9	**27,8**
1992/93	30,2	52,2	26,0	19,9	**27,7**
1993/94	29,5	53,8	26,5	19,0	**27,2**
1994/95	28,8	54,6	25,2	18,0	**26,4**
1995/96	28,2	56,9	25,1	17,3	**25,9**
1996/97	27,9	48,9	22,4	16,1	**25,3**
1997/98*)	30,2	53,9	20,0	18,7	**25,7**
1998/99	31,5	54,3	23,4	19,4	**27,4**
1999/00	32,3	56,6	25,3	19,1	**27,6**
2000/01	33,6	58,0	26,4	20,3	**28,9**
2001/02	34,0	62,8	24,7	20,7	**29,0**
2002/03	34,2	58,4	25,9	20,7	**29,2**
2003/04	34,5	59,5	26,8	20,6	**29,6**
2003/04**)	38,0	61,4	31,6	23,1	**33,0**

*) Aufgrund der geänderten Struktur bei Kur- und Erh.heimen, Übr. Fremdenunterk. u.Privatquartieren mit den Vorjahren nicht direkt vergleichbar.

**)Ohne Notbetten und Matratzenlager.

***) Da für 1985 keine Daten vorliegen, ist eine Vergleichbarkeit erst wieder ab der Wintersaison 1985/86 gegeben.

Übernachtungen in allen Fremdenunterkünften (minus Campingnächtigungen) im Winter (Betten im Februar)
bestes Ergebnis: 29,2 % oder 52,9 Tage/181
letztes Ergebnis 29,6 % oder 53,9 Tage/182

2. Sommer (1. Mai bis 31. Oktober), 184 Tage

Sommer	gew.	Kur- und Erholungsheime	übrige Fremdenunterkünfte	privat	insg.
1986	30,8	62,4	21,6	19,4	**26,4**
1987	31,4	62,1	21,8	18,5	**26,6**
1988	31,7	63,6	22,4	19,1	**27,1**
1989	33,9	58,0	23,2	19,9	**28,6**
1990	35,5	58,8	23,0	20,6	**29,7**
1991	37,1	67,0	24,6	23,3	**31,7**
1992	36,4	67,3	25,0	22,8	**31,3**
1993	34,7	66,1	24,2	21,9	**30,0**
1994	33,1	63,5	22,9	20,0	**28,4**
1995	31,2	63,7	21,3	18,3	**26,9**
1996	30,9	62,7	20,1	17,1	**26,0**
1997	30,7	62,8	18,7	16,3	**25,4**
1998*)	33,6	66,0	19,0	16,4	**26,3**
1999	33,8	67,3	19,9	16,3	**28,4**
2000	33,9	66,2	19,1	15,5	**26,1**
2001	33,6	67,7	19,3	15,5	**26,4**
2002	34,1	73,5	16,8	16,8	**26,4**
2003	34,1	66,1	19,4	15,9	**26,9**
2004	33,6	68,1	18,8	15,2	**26,4**
2004**)	36,9	70,6	23,0	16,9	**29,1**

**) Ohne Notbetten und Matratzenlager.

Übernachtungen in allen Fremdenunterkünften (minus Campingnächtigungen) im Sommer (Betten im August)
bestes Ergebnis: 31,7 % oder 58,3 Tage/184
letztes Ergebnis: 26,4 % oder 48,6 Tage/184

Bettenauslastung nach Bundesländern in %

1. Jahr (1. Jänner bis 31. Dezember, 365 bzw. 366 Tage)

	Bgld.	Ktn.	NÖ.	OÖ.	Sbg.	Stmk.	Tirol	Vbg.	Wien	**)	insg.
1994	21,4	18,0	22,6	22,8	29,3	22,9	28,3	28,2	42,7	47,6	**25,9**
1995	20,4	17,4	22,1	21,7	27,9	22,2	27,1	27,0	43,5	47,3	**24,9**
1996	19,9	16,8	21,2	21,1	27,2	21,9	26,7	26,8	45,5	52,1	**24,5**
1997	20,6	16,4	20,7	20,6	25,7	21,5	26,0	26,4	45,2	49,1	**23,9**
1998*)	22,5	17,2	21,5	21,2	26,1	21,9	26,9	26,8	47,8	51,9	**24,7**
1999	23,2	17,3	22,0	21,4	27,2	22,5	27,4	27,0	47,1	50,0	**25,2**
2000	23,9	17,5	22,4	21,3	27,2	22,5	28,3	27,2	48,1	51,1	**25,6**
2001	25,8	17,9	22,3	21,7	28,1	23,0	28,9	28,4	47,4	50,7	**26,3**
2002	25,9	19,2	21,1	21,7	28,8	22,2	31,6	28,3	46,7	49,2	**26,6**
2003	24,9	19,1	21,3	21,8	28,5	22,3	29,5	28,3	48,7	50,9	**26,7**
2003***)	26,7	21,4	24,1	24,6	31,7	25,1	33,3	31,9	51,0	53,5	**29,8**

*) Aufg. d. geänderten Struktur bei Kur- u. Erh.heimen, Übr.Fremdenunterkünften u. Priv.quart. mit den Vorjahren nicht direkt vergleichbar.
**) Wien (ohne Studentenheime)
***) Ohne Notbetten und Matratzenlager.
Übernachtungen in allen Fremdenunterkünften (minus Campingnächtigungen) im Kalenderjahr (Betten im August)

Some Austrian Facts:

• **In Austria 10.1% are independent; in tourism industry more than 23% are independent workers**

• **From all apprenticable occupations and/or apprenticeship schooling programs, among those specializing in accommodation and food related businesses the largest percentage number of graduates usually went into forming their own businesses and/or taking it over from their parents (Austria: 1981: 20.9% in tourism vs. 11.6% total; 1991: 15.75% in tourism vs. 9.4% total) (Tschurtschenthaler, 1998).**

2. The demand for Leisure and Tourism Products:
on the changing profile of customer

- Determinants for Leisure and Tourism Products
- Social and Economic Trends
- Trends in Travel and Leisure Behaviour

Changed Demographics

Aging population

Smaller Households

Single Boom

Only 1-2 Kids

Clustering

Cocooning

Classical Determinants for Leisure and Tourism Products

- Income
- Time
- Education
- Multioptional leisure behaviour
- Better access to destinations
- Increased mobility of tourists
- Flexible working time models

Social and Economic Trends (1)

Working time and leisure development

- Weekly, monthly, annually and lifetime working time
- Integration of working time, time for education, time spent in housekeeping and leisure time
- Women labor force of participation rate, Family, Number of births

Leisure Preferences

- Health, Beauty, Fitness, Wellness
- Sport
- Animation
- Culture

Social and Economic Trends (2)

Tertiarisation

- wealth, income,
- leisure,
- demographic Factors,
- expansion of international trade and investments
- deregulation, information- and communication technologies.

Value change– changing preferences

- hybrid optional customer
- increasing individualism and desire for freedom (to be in charge)
- eclectic lifestyle
- relaxation versus adventure
- increasing aestheticism

Trends in Travel and Leisure Behaviour (1)

- **Trend to Travel Behavior between relaxation and adventure:** search for increase of leisure experience
- **Trend to Individualization:** Search for independent travels according own ideas; preference of more flexible travel offers
- **Trend to Wellness:** Search for travels that should animate the overstrung person
- **Trend to superior travel offers:** Search for travels that offer amusement as well as culture and education
- **Trend to the "second home":** Search for comfortable lodging for homelike possibilities for retraction

Trends in Travel and Leisure Behaviour (2)

- **Trend to sunny destinations:** Search for destinations with sun guaranty
- **Trend to cheaper travels:** Search for cheap offers (value for money)
- **Trend to more frequent and shorter travels:** Search for travel offers that create diversion in everyday life
- **Trend to spontaneous travel decisions:** Search for travel offers that can be booked last minute
- **Trend to more mobility:** Search for travel offers with a lot of translocations as main attractions

The New Tourist (Poon, 1993)

More Experienced	Changed Values	Changed Lifestyles	Changed Demographics	More Flexible	More Independent
More travel experienced	No risk – no fun	Flexible work hours	Aging of population	Spontaneous	Individualised mass tourism
Quality conscious	Sensitive to environment	More income	Smaller households	Hybrid consumers	Risk-taking
Better educated	Want to be different	More free time	Single-Boom	Unpredictable	Consumers want to be "in charge" during their free time
Special interests	High touch	Healthy living	Only 1-2 kids	Less holiday planning	
More fun & adventure	"Just for the fun of it"	More frequent short breaks	Clustering – Dinks, Yuppies	Changed booking behaviour	
More variety	From having to being	Travel is a way of life	"cocooning"		

3. Towards the “new” tourism

1. Relevance and Possibilities of Growth
2. Competitive Forces in the “Old Tourism” and the “New Tourism”
3. New Forms of Organisation and Governance

Tourism – a higly fragmented industry

Small regional markets

94% of tourism business in the EU

Tourism SMEs

Average beds: 37 in 1998

Employ 83% of workers

Characteristics of Alpine Tourism

- Very high intensity of all three production factors is
  - Land
  - Capital
  - Human Resources
- Limited substitution possiblities
- Small and medium-sized structure => Excess capacities sold at low rates with unsatisfactory revenues
- (Excessive) Indebtedness as a loophole to maintain competitiveness

Growth Options of SMTEs

3. Qualitative Growth in existing destinations	**4.** Qualitative Growth in new foreign destinations
1. Quantitative growth in existing destinations	**2.** Quantitative growth in new domestic destinations

1. Simple quantitative growth in existing destinations

- **Growth Determinant:**
  Global and limited cost leadership strategy
- **Financing & Organisational Form**
  - equity capital and traditional loan capital
  - partly mergers & acquisitions

2. Simple quantitative growth in new domestic destinations

- **Growth Determinant:**
  Global cost leadership strategy
- **Financing & Organisational Form**
  - equity capital and traditional bank loans
  - Limited use of risk capital
  - Joint ventures, acquisitions, establishment of new enterprises

3. Qualitative growth in existing destinations

- **Growth Determinant:**
  Product differentiation due to innovations
- **Financing & Organisational Form**
  - Equity capital and traditional bank loans still an option
  - New forms of organisation and financing gain importance due to changing business models (e.g. mergers, JVs, co-operations and alliances, franchising)

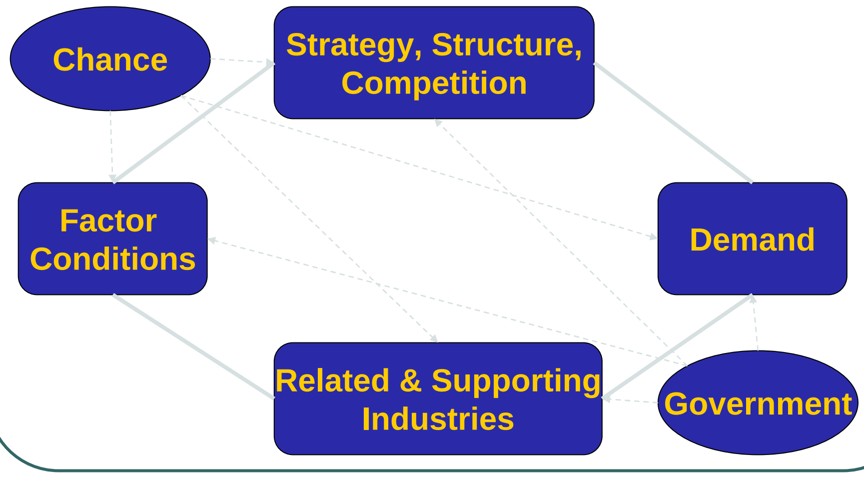
4. Qualitative growth in new foreign destinations

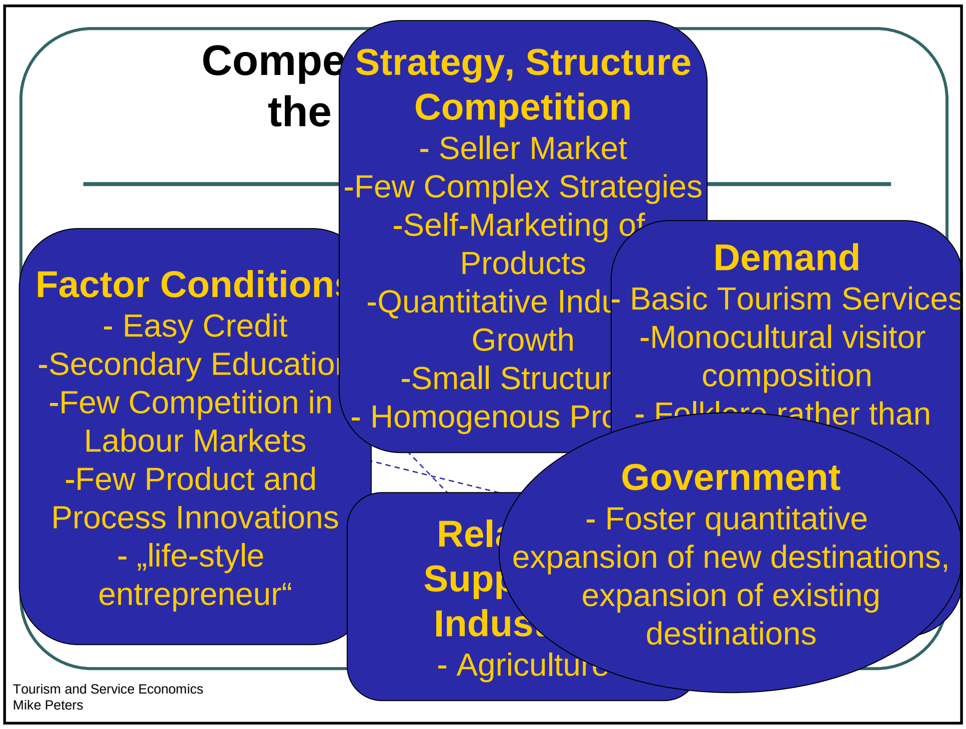
- **Growth Determinant:**
  Strategic core competencies
- **Financing & Organisational Form**
  - Mainly loan capital and risk capital through JVs
  - Network organisations as emerging form of management and control

- **SMTEs grow through**
  - M&A
  - Formation of partnerships
    Network organisations
- **Modern industrial economics**
  - Structure – Conduct – Performance

Competitive forces shaping the tourism industry

Competitive Factors
(Porter, 1993)





Sources of competitive disadvantages for traditional SMEs in tourism

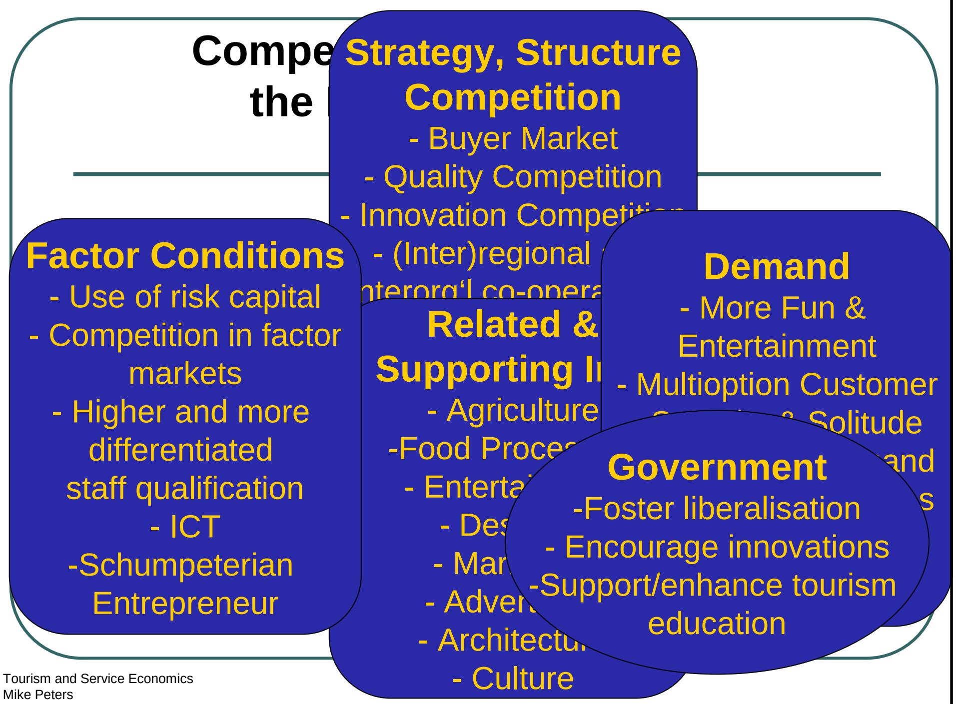
Due to Firm External Developments
Unpredictable market development in sending countries (economic situation, exchange rate/price level, etc)
Technological development Altering competitive situations in old and new tourism
Development of the domestic economy (highly improved productivity in other industries – cost pressures)
Development of tourism related industries (such as agriculture, transportation, architecture, trade, leisure industry, etc.)

Necessity for business adjustment

Sources of competitive disadvantages for traditional SMEs in tourism

Due to Firm Internal Developments
Inefficient and ineffective management
Insufficient adjustment of entrepreneurial capacities & behaviour
Problems related to firm succession
Insufficient adjustment towards leadership styles
Problems related to quality management
Deficiencies in product development
Missed market opportunities & Incorrect investment planning

Necessity for restructuring and/or reorganisation of internal processes



Challenges for Entrepreneurs:

- Product Development
- Create Experiences
- Growth Management to gain economies of scope/scale
- Qualification improvement
- Find niches and/or Markets
- Know Customers!

PART II
The Tourism Family Business

1. Business planning processes in tourism family enterprises

Aim

- Highlight the relevance of planning for family businesses
- First analysis of a newly generated data set
- Investigate the planning and strategy development behaviour of family enterprises
- Discussion of data, interpretation

Planning as a

- success factor *(Brown, 1995)*
- responsible for the performance *(Aram and Cowen, 1990)* and
- the growth *(Astrachan and Kolenko, 1994, Ward, 1997)* of an enterprise.

Only scarce literature

dealing with the planning and strategy development processes in family businesses *(Rue and Ibrahim, 1995, Upton et al., 2002, Sharma et al., 1997, Rue and Ibrahim, 1996, Wortman, 1994)*

I. Small enterprises and family enterprises in tourism

- In 1996, over 6.5 million people in the European Union were employed in approx. 1.4 million enterprises in the tourism industry.
- This corresponds to 7.7% of all enterprises and 5.8% of the total number of employees in the EU.
- SMEs are still dominating the hospitality industry

I. Small enterprises and family enterprises in tourism

- In the Austrian hospitality industry 92% are small sized enterprises (<9 employees) *(WKÖ, 2003)*
- 80% of the hospitality industry in the Alpine regions of Austria, Switzerland, France and Italy are family businesses

II. Family Businesses

…are businesses where the family ownership or control do have a significant influence upon the decision making processes in an enterprises.

(Upton/Teal/Felan, 2002, p.72; Hammer and Hinterhuber, 1994, p.14)

II. Family Businesses: advantages

- Personal relationship to enterprise stakeholders *(Peters and Raich, 2002, Meissner, 1994, Steinle et al., 2002)*
- Market niche advantages *(Frehse and Peters, 2002)*
- Flexibility and reaction *(Ittner and Larcker, 1996, Upton et al., 2002)*
- The continuity of the family business and its maintenance can be interpreted as strong values in a society *(Peters, 2001)*

II. Family Businesses: disadvantages

- Financing *(Bornett and Neubauer, 1985, Hennerkes, 1998)*
- How to fire a family member? *(Terberger, 1998)*
- No planning or strategy development *(Leghorél et al., 2000; Hennerkes, 1998)*

Tourism and Service Economics
Mike Peters

II. Family Businesses: planning areas

Personal life:
Improvement of Learning- or Performance capacity
Quality of Life/Health
Communication
Career Planning
Personal Goals
Education etc.

Property/Succession:
Retirement Planning
Organisation of Inheritance/donation
Financing
Investments
Successor organistion
Legal, taxation issues etc.

Family Life:
Family safety and security
Harmony in family life
Public relations
Legal Issues
Shares, Succession
etc.

Business Life:
Employees
Profits, Sales
Investments, Reorganisation
Growth issues,
Valuation of enterprise
Acquisitions etc.

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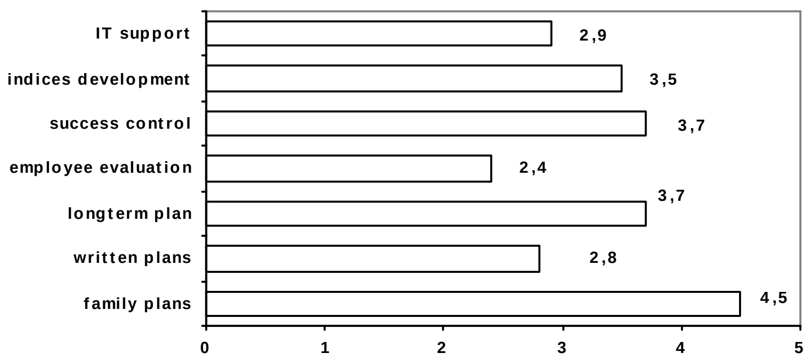
III. Empirical survey: the sample

- Only hotels (>30 beds) and restaurants (full time businesses) where the family (partially) owns the enterprise.
- 65% of the questionnaires (156) could be used for statistical analysis.
- The sample consists of hotels with average bed size of 72.3 in 2003. 105 firms exist for more than 10 years.
- 1993 these hotels displayed an average bed size of 60.4
- Only 7.1% were 2 star, 63.4% 3 star hotels, and 30% 4 star or 5 star hotels.

III. Empirical survey: *Planning behaviour in family businesses*



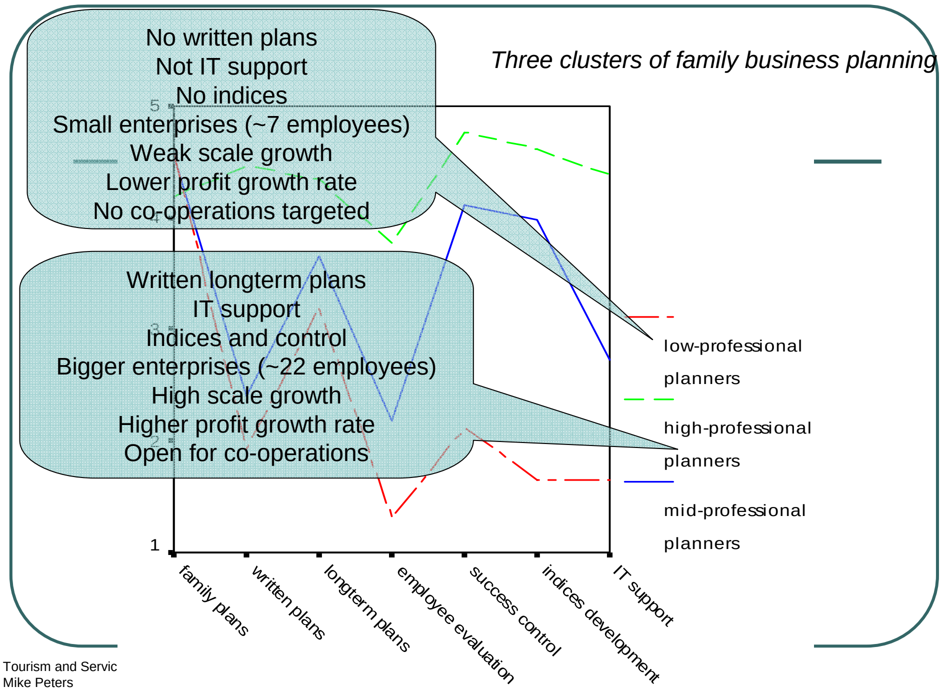
measured on a five-point Likert scale, 1='absolutely no' to 5='absolutely yes

III. Empirical survey: *(dis-)advantages*

Advantages of a family firm (in % of responses)	
Higher motivation to work	33.3%
Products/services are personalized for the customer	19.1%
Family firms have a convenient, manageable size	15.4%
Flexibility	14.8%
Independence of the business	10.5%
Saving labour cost/wages	6.8%
Disadvantages of a family firm (in % of responses)	
Higher work load in a family business	49.5%
Conflict within the family and/or generations	20.2%
No separation between private and professional life	10.1%
Rigid traditions	9.2%
Small firm size	7.3%
Family liability and guarantee for the firm capital	3.7%

III. Empirical survey: *written plans*

- 68.6% of the family businesses have a written plan, 31.4% never write down their future plans.
- If we compare the profit development within the last 10 years it can be observed that the 'enterprises with written plans' can present a better profit improvement than those enterprises which do not write down their future plans.



Who is involved in planning?

Persons/Institutions involved in planning	*Mean value* (1=not involved, 5=strongly involved
Entrepreneur	4,86
The entrepreneurs' family	4.43
Manager (not a family member)	3.13
Key employees	3.14
External assistants (consultants etc.)	2.96

Additional findings:

- Family businesses want to have control over their business and *to keep the ownership in the hands of the family members*
- The size of a family business is positively related to the entrepreneurs' *willingness to cooperate* with other enterprises.
- Those enterprises which actually *cooperate with other enterprises do have significantly higher profit growth rates* than the other enterprises in the sample (p<.05).

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Conclusion

Challenge for Tourism Education and Training
-Business plan development
-Use of indices in the family business, etc.

- Importance of deeper re[...] family business develop[...]t in the tourism industry
- The number of small [...]mily businesses which do develop pl[...]ns is higher than expected
- Many plans are still developed in the family entrepreneurs' mindset

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Conclusion

Interdisciplinary Research
Psychologists, Sociologists

- In family businesses the ‘family and business systems’ have a strong overlap
- The majority of businesses to be found among the mid-professional planners
  - No written plans, no employee evaluation, no IT support, no longterm orientation
- Reluctance of tourism family businesses

How to create incentives for co-operations:
-lead firms
-cluster formation (Tyrol Wellness)

Thank you very much for your attention!

Questions?