

WHERE MOUNTAIN PASTURES STIMULATE THE SENSES.

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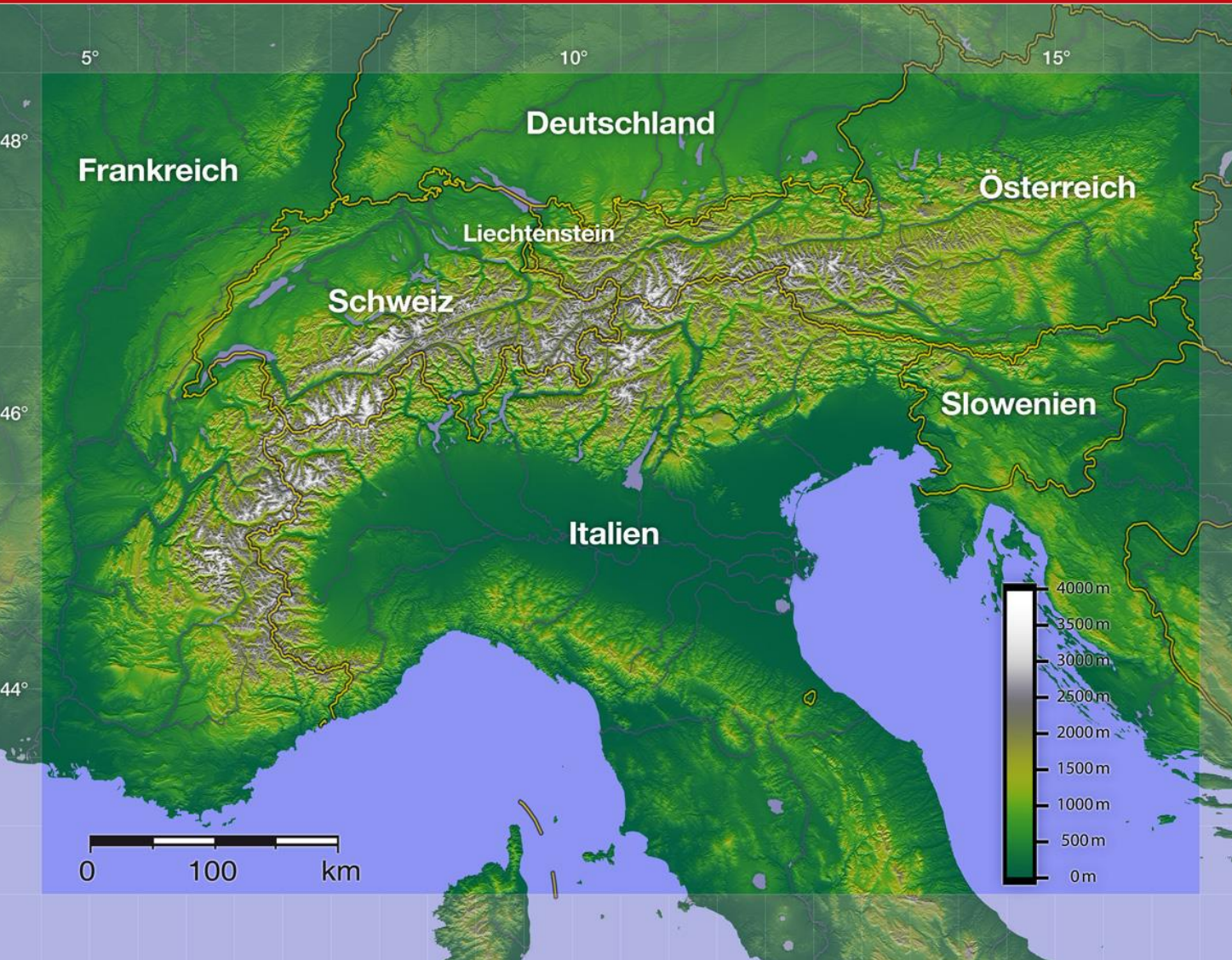
The Challenge of the Peaks



Today's Presentation

- Role of the Alps in the Austrian tourism
- Historical perspective
- The Alpine summer: ups and downs
- Austria's Alpine summer: best practice

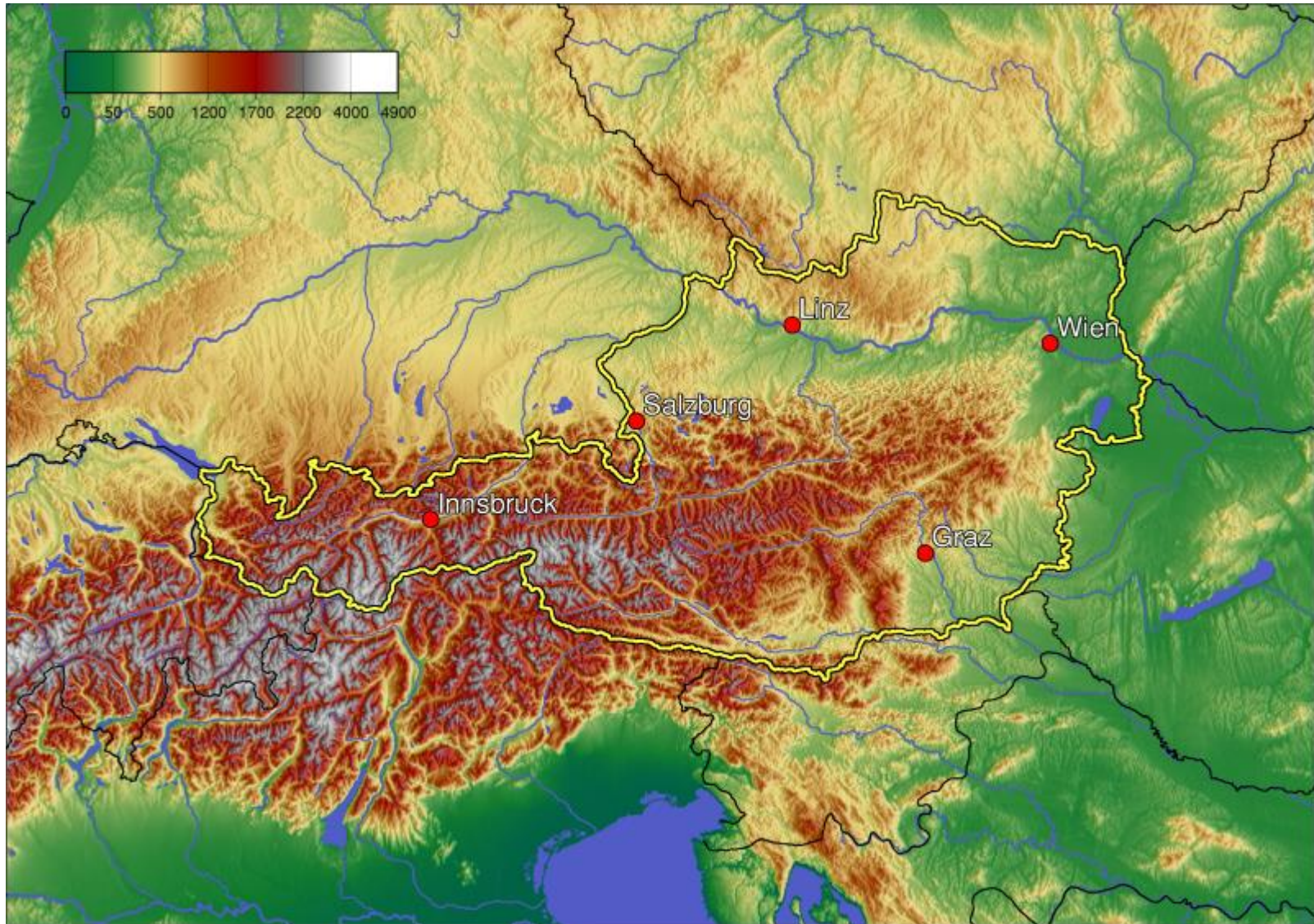
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Importance of Alpine tourism

- Alpine region:
7,3 m. beds, 475 m. overnights
- 2008: more than 36 m. international arrivals
- Market share: 4%
- Less dynamic development than global industry since mid-1990's

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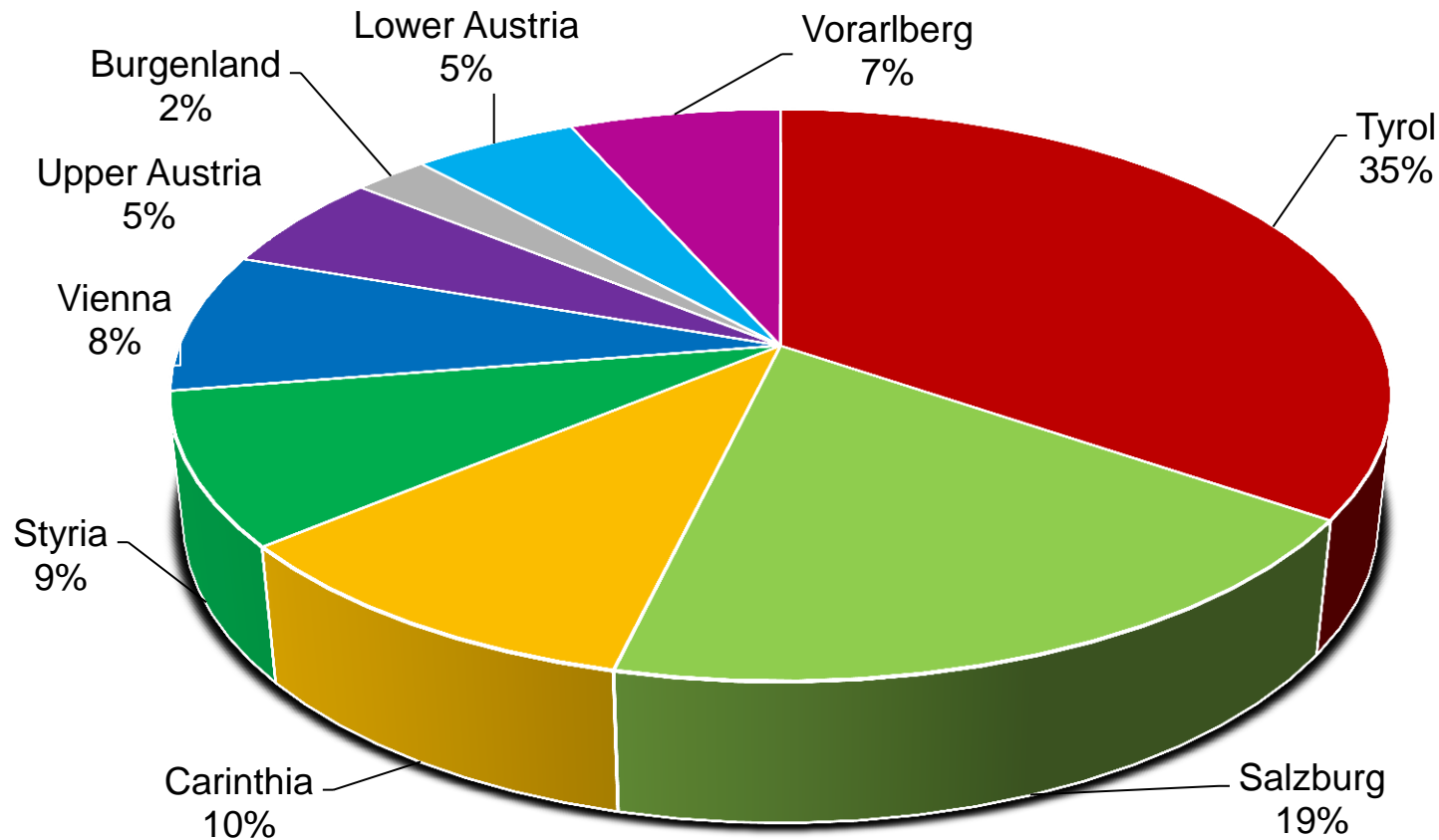


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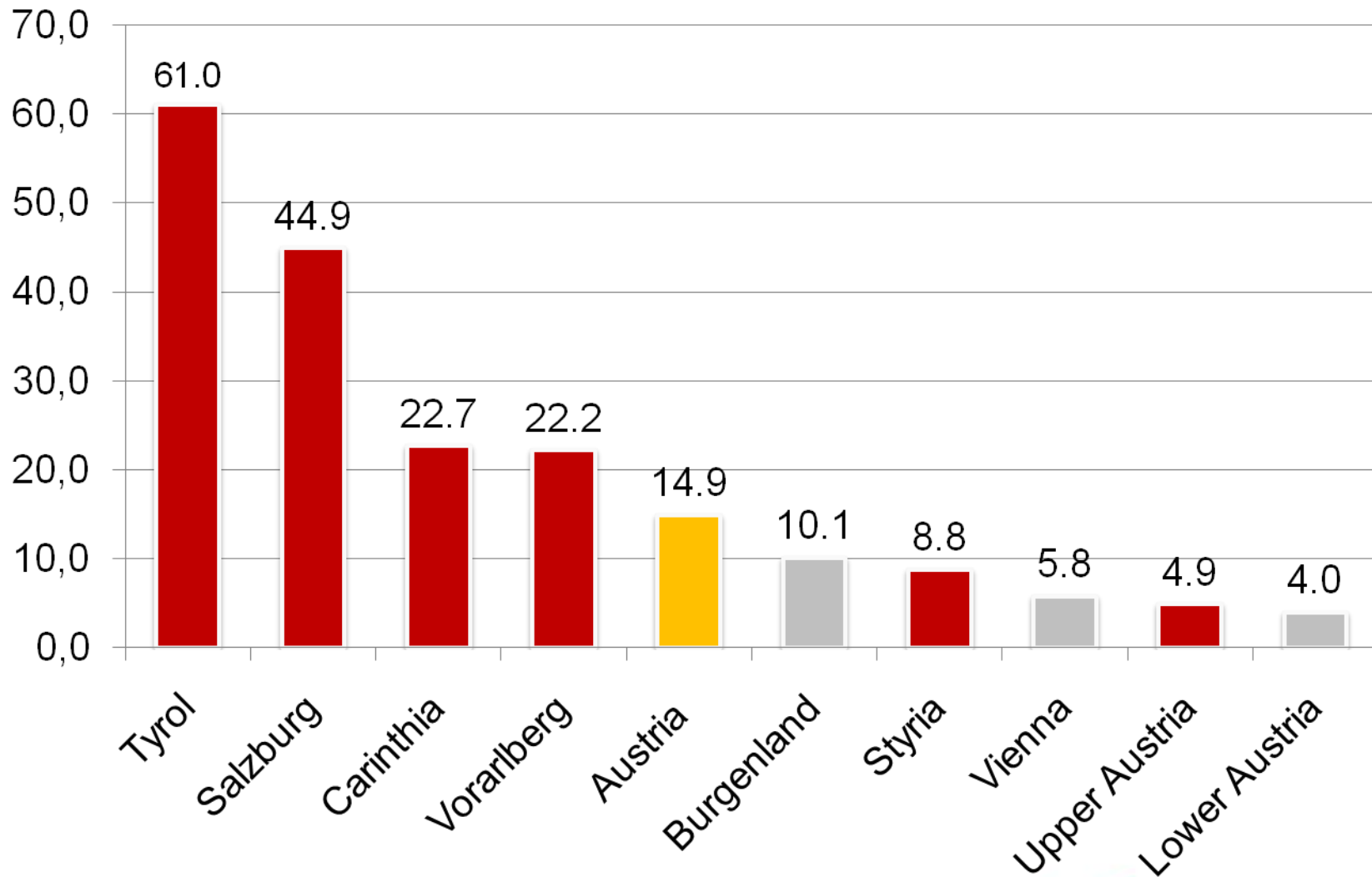
Share of overnights 2009 (total 124.3 m.)



Source: Based on data from Statistics Austria

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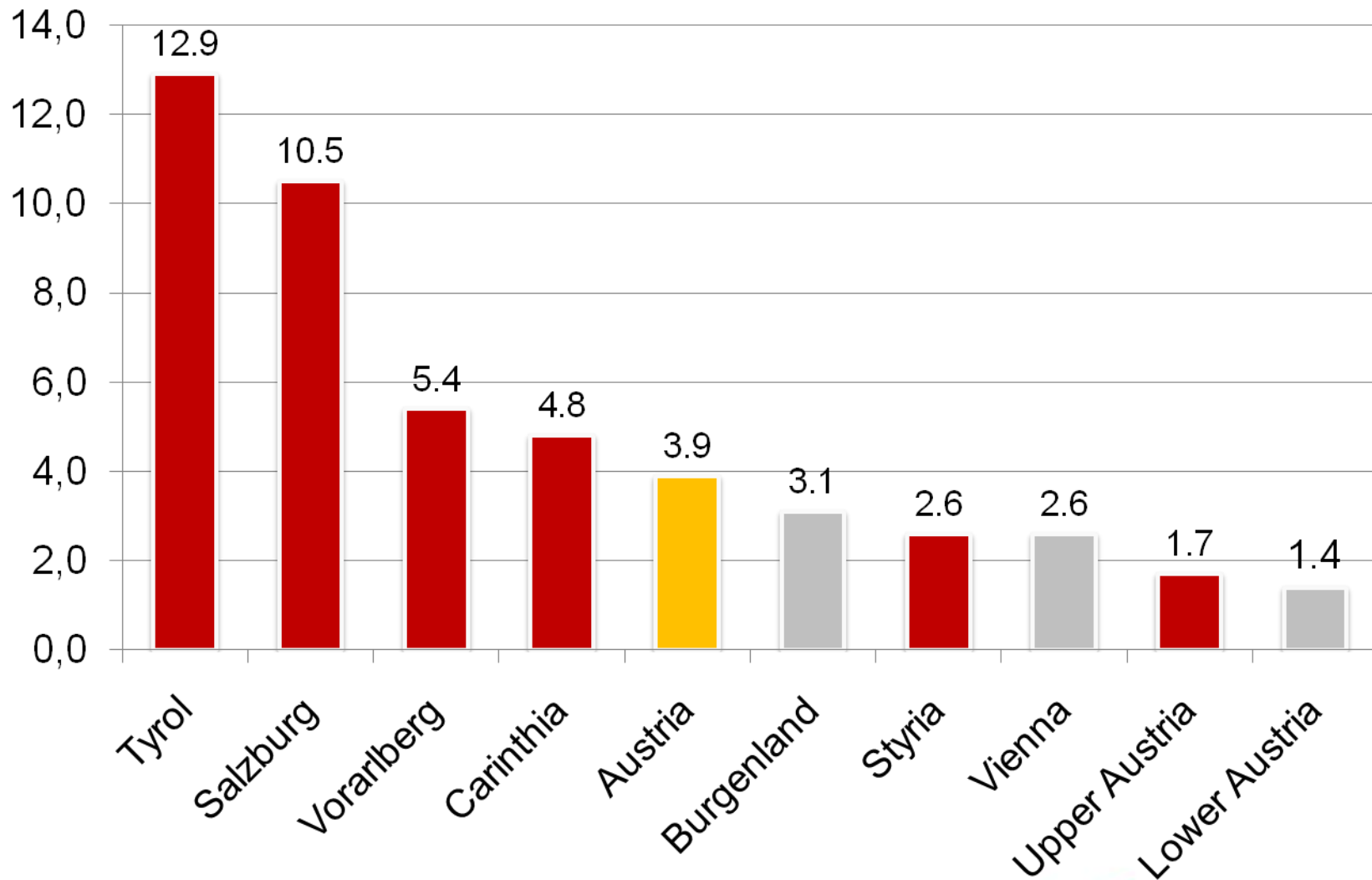
Overnights per capita 2009



Source: Based on data from Statistics Austria

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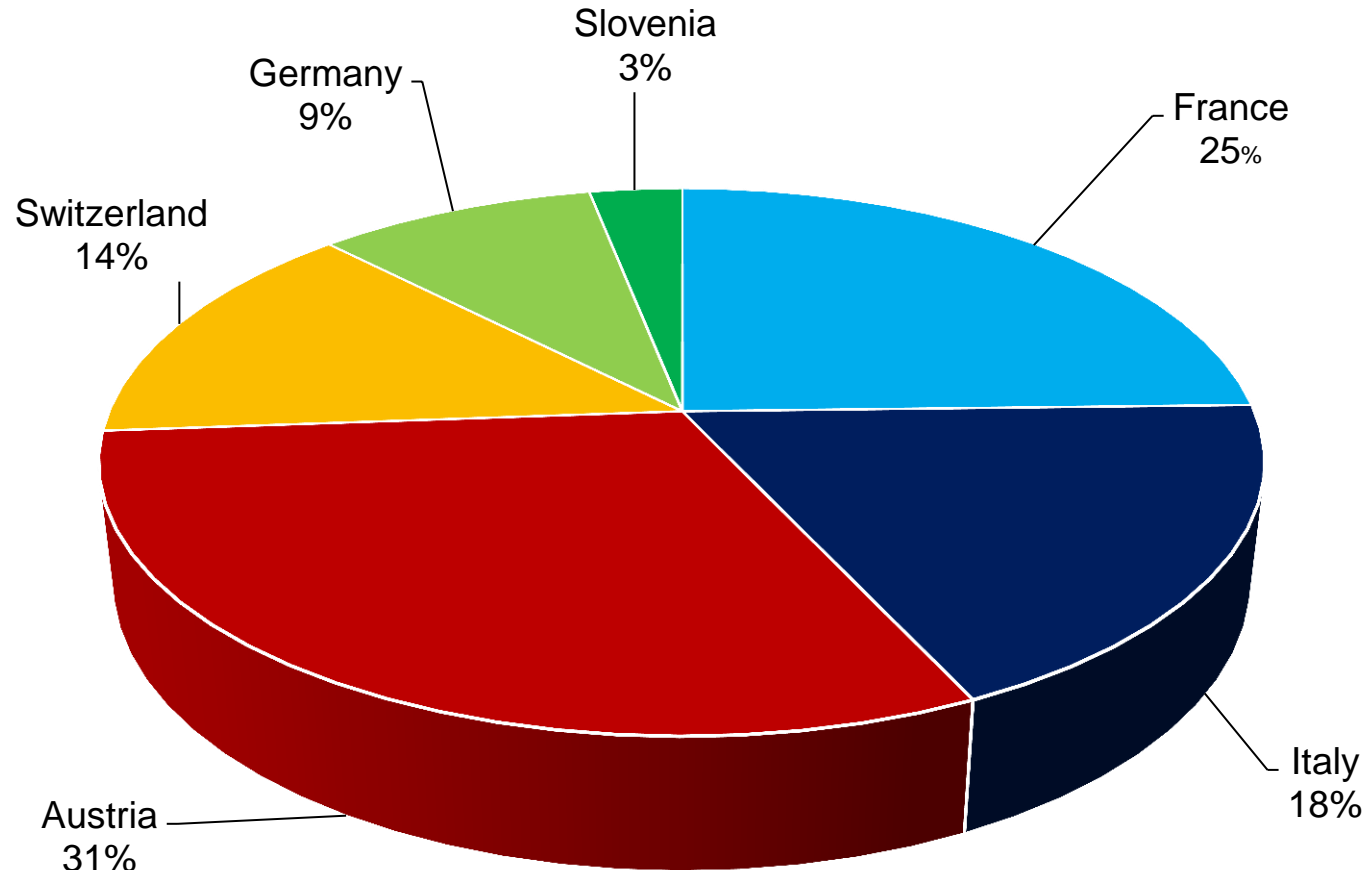
Arrivals per capita 2009



Source: Based on data from Statistics Austria

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Overnights in the Alps, 2008 (excl. second homes)



Source: BAKBASEL 2010, p. 41. Overnights in hotels and similar accommodations (excl. second homes)

ROOM FOR FLIGHTS OF FANTASY.

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Josef Heinrich Darchinger;
Wirtschaftswunder: Germany after the War; 2008

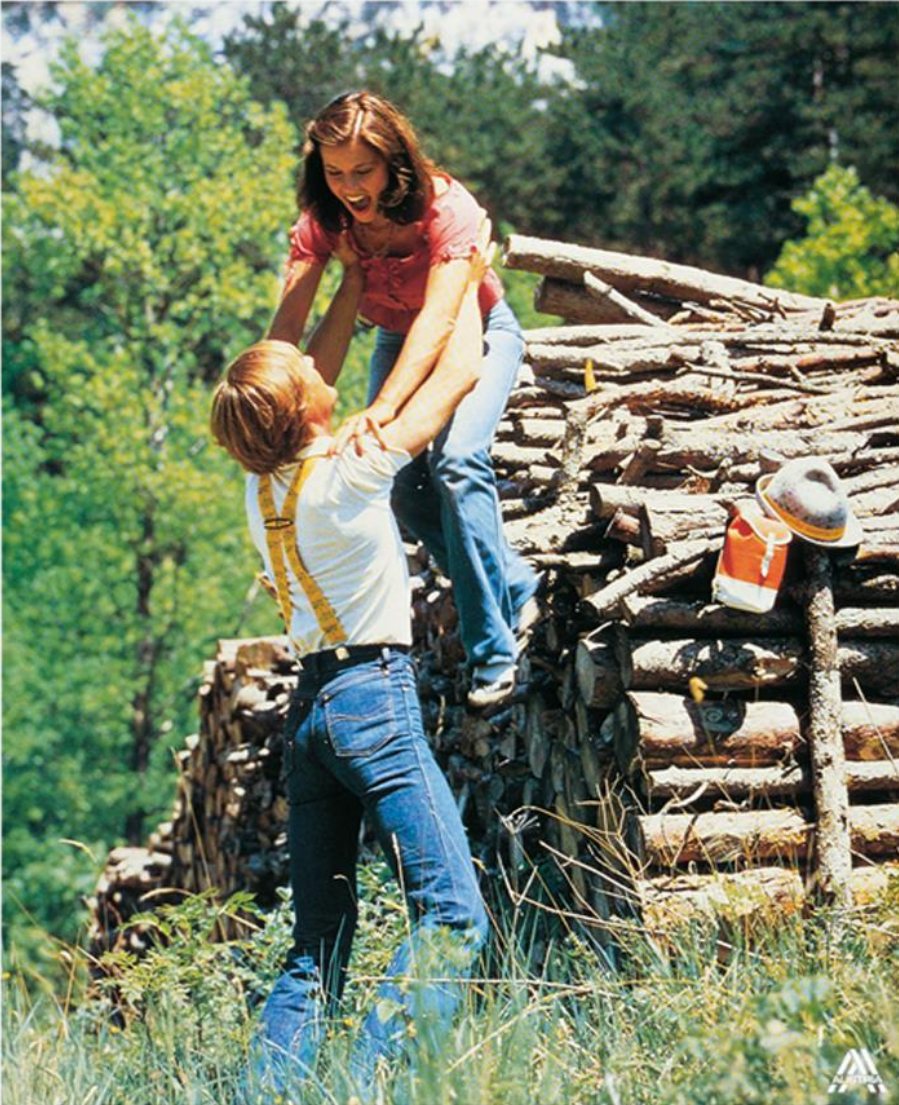
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Josef Heinrich Darchinger;
Wirtschaftswunder: Germany after the War; 2008

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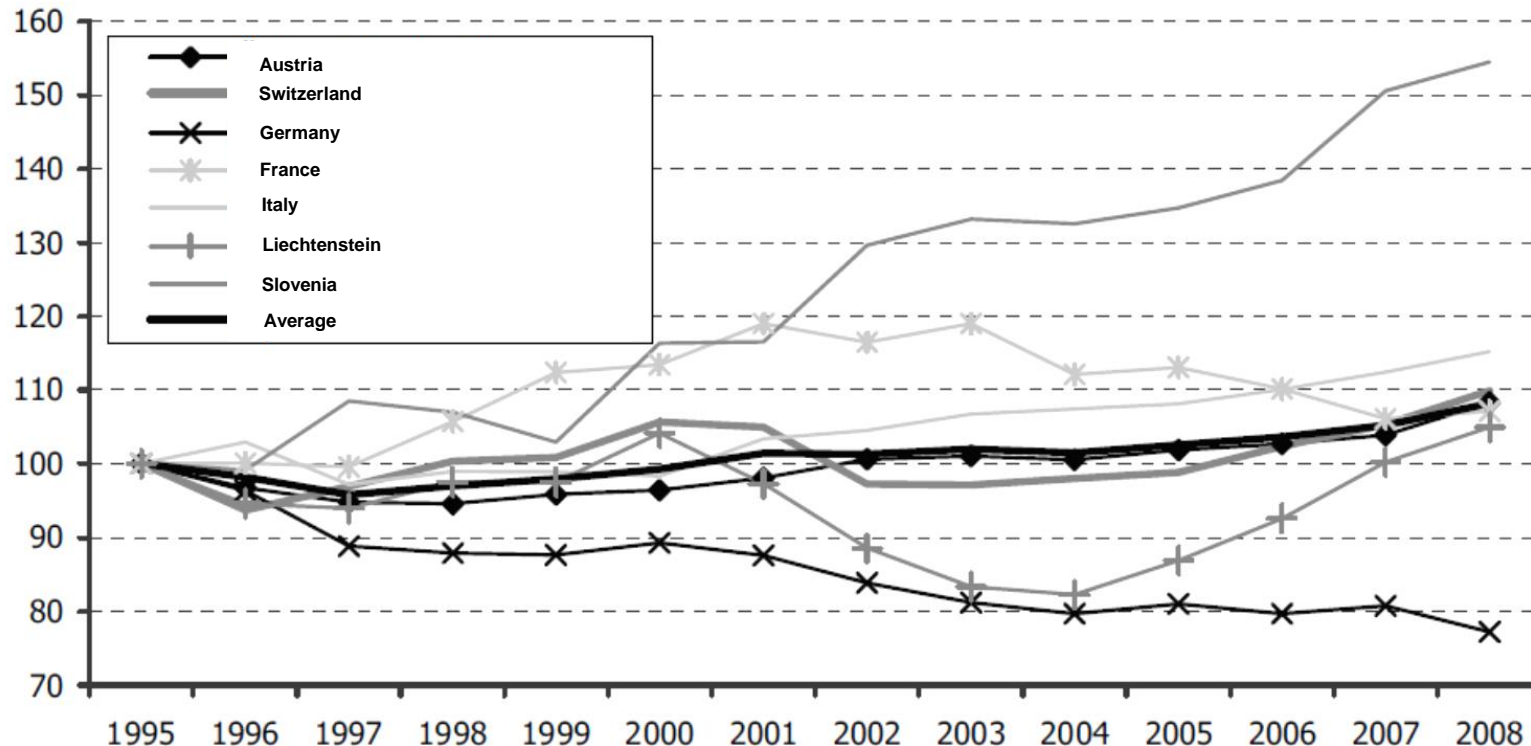
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Josef Heinrich Darchinger;
Wirtschaftswunder: Germany after the War; 2008

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Development of Overnight Stays in the Alps, 1995 - 2008

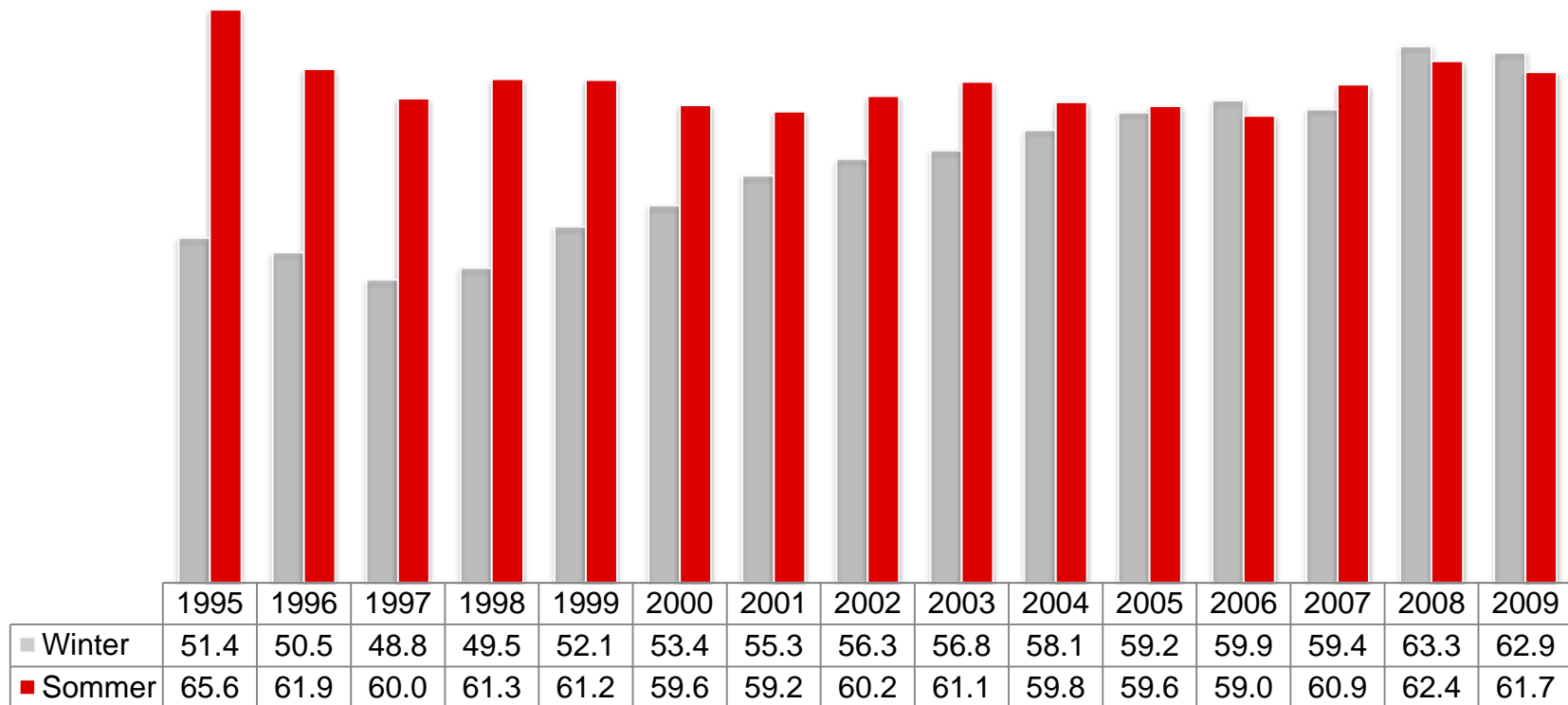


Index, 1995 = 100

Source: BAKBASEL 2010

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Development of Overnights in Austria (mn.)



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Reasons for choosing Austria:

- Scenery and nature: 73%
- Mountains: 53%

Source: T-MONA 2008

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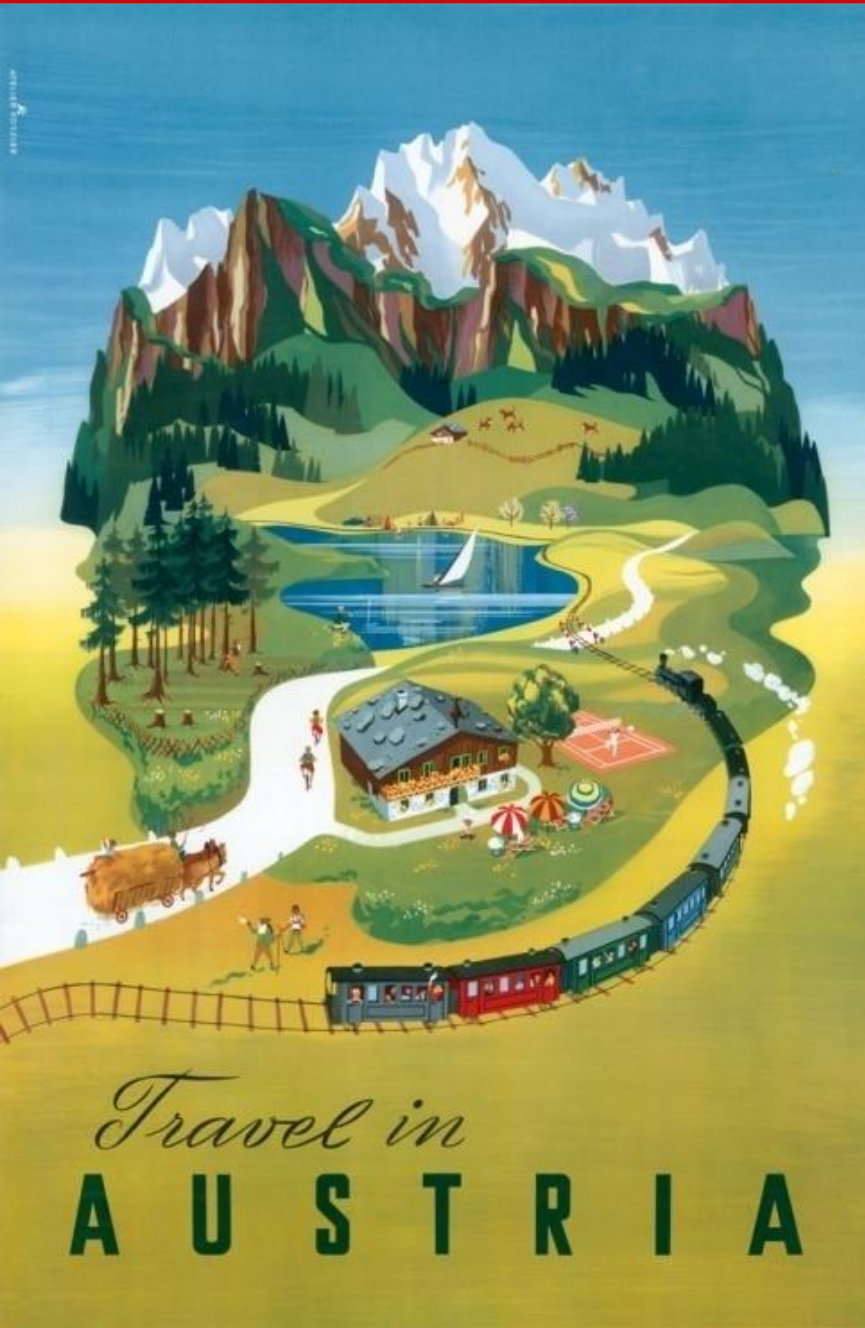
Ferienparadies
ÖSTERREICH

Reasons for choosing Austria:

- Fresh air, climate: 58%
- Peace and quiet: 40%

Source: T-MONA 2008

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Reasons for choosing Austria:

- Hiking: 37%
- Natural attractions: 34%

Source: T-MONA 2008

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Motive for summer holiday:

- Relaxation
- Hiking, active vacation
- Cycling, mountain biking

Source: T-MONA 2008

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Can you imagine visiting the Alps in the next three years?

	NL	DK	CH	UK	BE	FR	SE	IT	DE
Austria	20	24	31	7	20	12	42	18	9
Switzerland	10	11	68	8	15	14	34	16	3
South Tyrol (north ital. Alps)	8	13	19	3	12	14	29	16 (22) (18)	4 (1)
Bavarian Alps	7	12	13	5	10	12	29	11	12 (7)
French Alps	13	16	11	7	27	36	29	14	1

Percentage of all potential guests responding

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Serfaus Fiss Ladis

- Focus on families
- Quality for premium price
- Offer tailored to target groups
- Co-operation among industry players

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Grosses Walsertal

- Focus on natural resources, traditions
- Focus on brand
- Expanding horizons
- Sustainability
- Networks of cooperation

FREIRAUM FÜR GEDANKENFLÜGE.

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