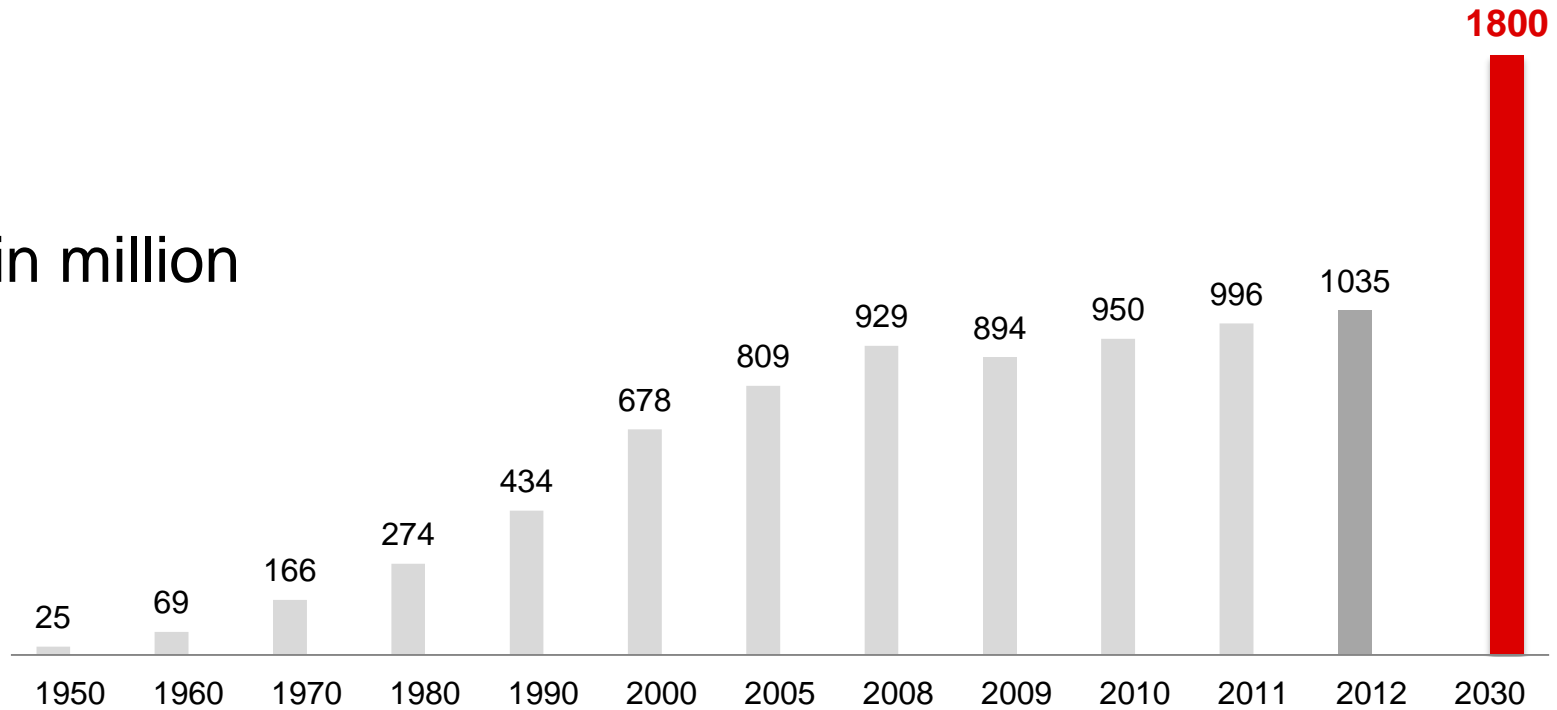Austria
arrive
and revive

Global growth's challenge

International arrivals

in million

Year	Value
1950	25
1960	69
1970	166
1980	274
1990	434
2000	678
2005	809
2008	929
2009	894
2010	950
2011	996
2012	1035
2030	1800

Austrian National
Tourist Office

Europe's market share slipping

	Market Share 2012	Development, 1992-2012 (in percentage points)	Forecast Market Share 2030
Europe	52%	-7	41%
America	16%	-6	14%
Africa	5%	1	7%
Middle East	5%	3	8%
Asia/Pacific	23%	9	30%

Europe was able to reclaim some market share in 2011 and 2012.

Austrian National Tourist Office

Austrian National Tourist Office

ANTO

Established:

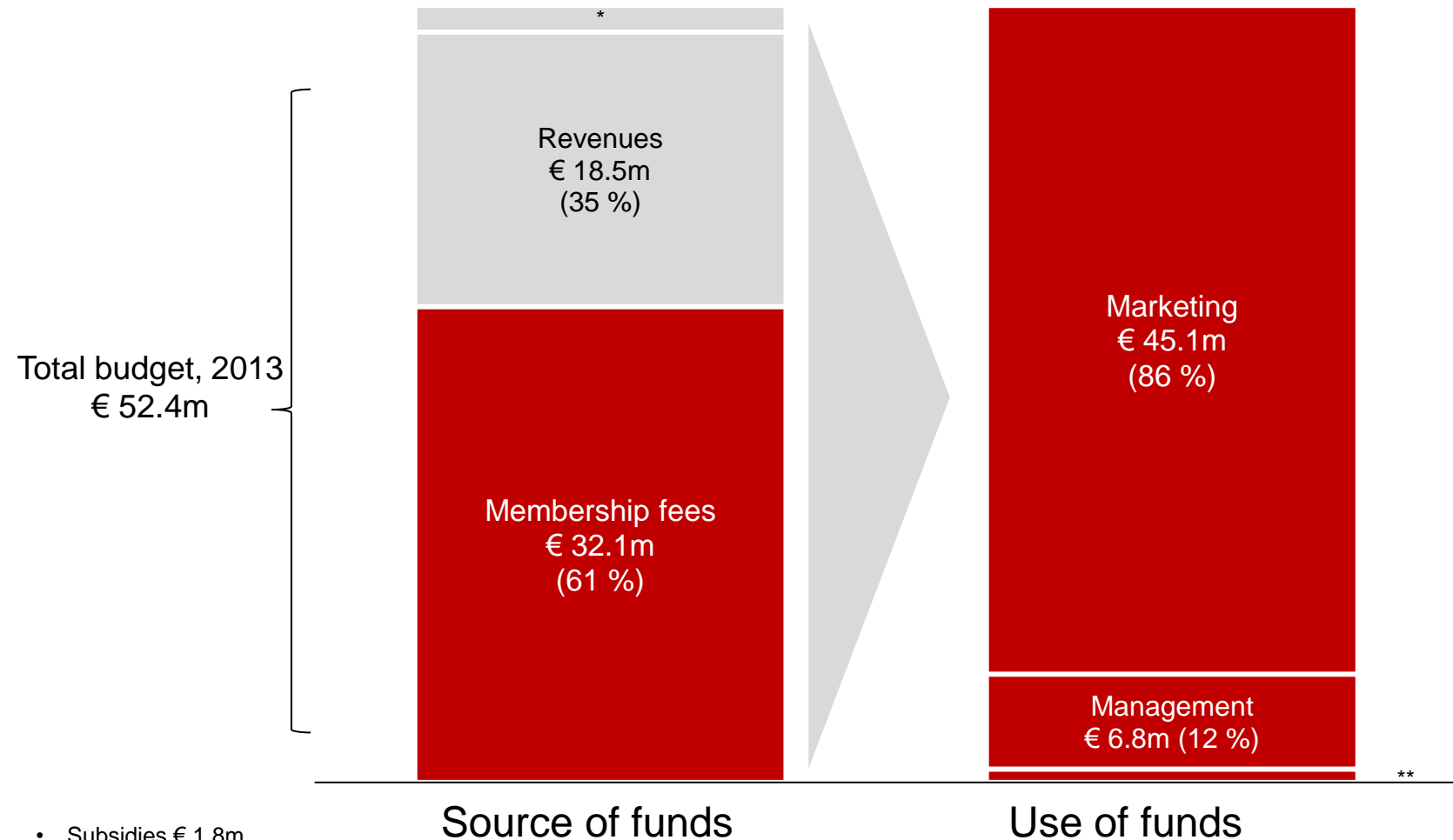- 1955

Legal form:

- Association

Members:

- Republic of Austria (75%) Federal Ministry of Economy, Family and Youth
- Austrian Economic Chamber (25%)

President:

- Reinhold Mitterlehner, Federal Minister of Economy, Family and Youth

Annual budget: approx. € 50m

Total budget, 2013
€ 52.4m

*
Revenues
€ 18.5m
(35 %)

Membership fees
€ 32.1m
(61 %)

Marketing
€ 45.1m
(86 %)

Management
€ 6.8m (12 %)

Source of funds

Use of funds

**

• Subsidies € 1.8m
** Financial costs 0.9 m (2%)

Austrian National
Tourist Office

Austrian National Tourist Office

21 market offices around the world

Strategy and
Areas of core competence

Austrian National Tourist Office: Strategy

- **"Vacation in Austria" brand:**

We differentiate Austria from other destinations, and communicate the emotional plus of a vacation in Austria.

- **Innovative, modern marketing:**
We develop the most promising international markets.

- **Partnership with business:**
We serve as a platform for networking,
and share our in-depth knowledge about guests and markets with the tourism industry.

Core competence: Brand

"Vacation in Austria" brand

Core competence: Marketing

Creative and innovative marketing – in promising markets

Core competence:
Partner management

Network node

Global trends

– Urbanization, smart cities, mobility

- Demographic change, older population

– Search for meaning, sustainability

– Connectivity

… will result in dramatic changings of DMO existance

Complexity will increase

- From Tourism Marketing

- to Tourism Management (corporate governance)
  - Creation of marketable product-market-combinations through the establishment of cooperative product development and marketing platforms

- to Destination Governance
  - no design of products "under one roof" possible, from thinking in structures towards the thinking in networks
  - New competences necessary:
    - Controlling of a self-regulation network,
    - Transparent control of the network
    - Setting and monitoring of quality standards for products,
    - Questions of resource pooling

Österreich Werbung

In theory, theory and practice are the same. In practice, they are not.

Albert Einstein