

## Research Article

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# The position of the farm holiday in Austrian tourism

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**Abstract:** Tourism is vitally important to the Austrian economy. The number of tourist destinations, both farms and other forms of accommodation, in the different regions of Austria is considerably and constantly changing. This paper discusses the position of the ‘farm holiday’ compared to other forms of tourism. Understanding the resilience of farm holidays is especially important but empirical research on this matter remains limited. The term ‘farm holiday’ covers staying overnight on a farm that is actively engaged in agriculture and has a maximum of 10 guest beds. The results reported in this paper are based on an analysis of secondary data from 2000 and 2018 by looking at two types of indicator: (i) accommodation capacity (supply side) and (ii) attractiveness of a destination (demand side). The data sets cover Austria and its NUTS3 regions. The results show the evolution of farm holidays vis-à-vis other forms of tourist accommodation. In the form of a quadrant matrix they also show the relative position of farm holidays regionally. While putting into question the resilience of farm holidays, the data also reveals where farm holidays could act to expand this niche or learn and improve to effect a shift in their respective position relative to the market ‘leaders’. However, there is clearly a need to learn more about farm holidays within the local context. This paper contributes to our knowledge of farm holidays from a regional point of view and tries to elaborate on the need for further research.

**Keywords:** Farm holiday; Farm tourism; NUTS3; Resilience; Rural areas; Austria

## 1 Introduction

In recent years, the ‘farm holiday’ – combining agriculture and tourism on the farm – has been growing in popularity. Amongst various forms of on-farm diversification, the farm holiday is often seen as a »development« potential for farms and rural areas. In this context, the ‘farm holiday’ contributes to the maintenance of a farm and regional heritage and is a window looking forward to a new type of farmer in rural areas (Van der Ploeg 2018). Specifically, farm holidays should generate additional income, promote employment and support the livelihood of the farm. They should also contribute to a well-managed cultural landscape in rural areas.

Several Austrian studies (Gattermayer 1992; Haas 2005; Handlechner 2010; Kirner 2018; Ornter 2010; Schwarz 2017; Strelli 2013) and articles (Embacher 2003; Pevetz 1970; Pevetz 1979; Pevetz 1994; Pevetz 1996; Pevetz 1997) have been published in recent years that focus on the economic, social, rural as well as funding issues of farm holidays as well as the need for digital tools. Despite the merits of these previous studies, Austria lacks analyses of the resilience and evolution of farm holidays versus ‘other forms of tourist accommodation’. The rationale of this paper lies in the fact that the ‘farm holiday’ in Austria has a long tradition and has developed differently from region to region. In the long-run, given the importance to the farms’ resilience of this side-line activity it is critical to identify ways to support, improve and develop it further. The underlying definition of the resilience of farm holidays is that the “*competitiveness for a destination is about the ability of the place to optimise its attractiveness for residents and non-residents, to deliver quality, innovative, and attractive (e.g. providing good value for money) tourism services to consumers and to gain market shares on the domestic and global market places, while ensuring that the available resources supporting tourism are used efficiently and in a sustainable way.*” (Dupeyras and MacCallum 2013: 7). Since the ‘farm holiday’ can be seen as an intrusion of the agriculture sector into tourism sector a comparison between ‘farm holiday’ and ‘other forms of tourist accommodation’ is indispensable when analysing

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ing the development of either. This should in turn lead to research into the reasons behind any positive or negative changes with a view to identifying any approaches for the enhancement of mutual benefits. With this in mind, this paper lays the groundwork by (i) defining the ‘farm holiday’ within the context of tourism and (ii) analysing the variety and prevalence of farm holidays currently within the tourism sector and their evolution over time as compared to ‘other forms of tourist accommodation’. The paper then looks at data within the context of Austria as a whole and according to its spatial typologies such as provinces and rural, intermediate and urban regions to identify the relevant changes. Two core types of indicator, namely (i) accommodation capacity (supply side) and (ii) attractiveness of a destination (demand side) show these changes. The increase or decrease of the indicator values comparing 2000 to 2018 is based on the calculation of the fixed index method. The differences in the change are evaluated using a t-test.

To this aim the paper comprises the following sections. After a brief look at the definition of the ‘farm holiday’ within the tourism sector the paper outlines the methods and materials deployed in the analysis. Subsequently the findings are presented highlighting the changes and extrapolating certain assumptions regarding the resilience of the ‘farm holiday’ per se. The ensuing discussion leads to a number of areas for future research.

## 2 Terminological setting

Austria has a broad spectrum of regional specificities. Since we are comparing the ‘farm holiday’ to ‘other forms of tourist accommodation’ that occur in different areas and regions it is important to define this competitive as well as potentially complementary setting. The ‘farm holiday’ with an intrinsically agricultural background is a niche market which is trying to establish itself within the tourist sector (Figure 1). Since the ‘farm holiday’ straddles at least two sectors, this term often has conflicting definitions and comprises a variety of activities and settings. For the purpose of this paper a ‘farm holiday’, as defined below, can take place in any of the three regions urban, intermediate and rural.

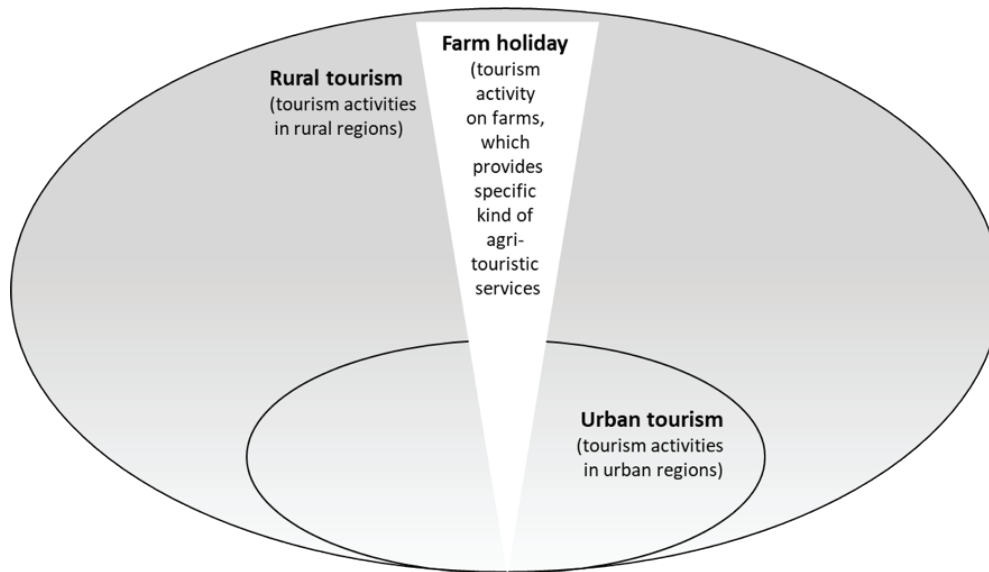
Urban regions have a type “*of tourism activity which takes place in an urban space with its inherent attributes characterized by non-agricultural based economy such as administration, manufacturing, trade and services and by being nodal points of transport. Urban/city destinations offer a broad and heterogeneous range of cultural, archi-*

*tectural, technological, social and natural experiences and products for leisure and business*” (UNWTO n.d.). Not all tourism, but some, which takes place in urban areas spills out into rural areas through excursions, employment and purchases, and vice versa (European Parliament 2013: 27). Conversely, rural tourism basically covers all tourism activities in the rural regions with the following characteristics: (i) low population density, (ii) landscape and land-use dominated by agriculture and forestry and (iii) traditional social structure and lifestyle (UNWTO n.d.). The main motive behind rural tourism is to experience and enjoy rural areas, rural communities and rural life (Ayazlar and Ayazlar 2015: 168-170). Rural tourism encompasses a wide range of products generally linked to nature-based activities, agriculture, rural lifestyle and culture as well as sightseeing and outdoor activities (e.g. mountaineering, rock climbing, rafting, canoeing, angling, hunting). Likewise, indoor activities may also be practiced, especially in connection with the tourists’ wellness. (UNWTO n.d.). The intermediate regions show characteristics common to both rural and urban regions. Any tourism taking place in these regions will be a corresponding mix of the two.

Agriculture, by necessity, has been trying to gain a foothold into this well-established sector for many years. The term ‘farm holiday’ refers to active farms that supplement their primary agricultural function with some form of tourism activities (c.f. Gil Arroyo et al. 2013: 45; Barbieri and Mshenga 2008: 168; Flangian et al. 2014: 399; Gladstone and Morris 2000: 93; Kizos and Iosifides 2007: 63; Sonnino 2004: 286). The farm is the setting for accommodation, hospitality and further products provided to the tourist. One or more of the following can be enjoyed (i) on-farm accommodation (e.g. bed and breakfast), (ii) food services, (iii) direct participation in agricultural activities (e.g. picking the grapes, milking a cow), (iv) indirect enjoyment of farm activities (e.g. enjoying meals on site, picking an apple right off the tree, hearing goat bells ringing, watching grazing cows), and (v) recreational activities in which the farm provides the landscape, such as e.g. relaxing from the daily grind in the organic sauna, finding refreshment wandering barefoot through the dewy pastures outside (Austrian Farm Holidays Association 2019; cf. Chase et al. 2018).

Generally, the ‘farm holiday’ in Austria is defined by private accommodation in the form of guest rooms and/or holiday apartments as well as its number of beds (Federal Ministry of Sustainability and Tourism 2018: 238; Statistics Austria 2019a: 15-16 and 25). This category includes all forms of accommodation that are let by a farmer privately and without a concession to guests but which fulfil certain requirements, such as rural environment and

Generally, “tourism entails the activities of persons travelling to, and staying in, places outside their usual environment for not more than one consecutive year for leisure, business and other purposes” (UNWTO 1994: 5)



**Figure 1:** The ‘farm holiday’ within the tourism sector (own illustration based on UNWTO 1994: 5 and UNWTO n.d.)

farm life among others. They therefore enable the guest to experience the farming population as well as discover the latter’s professional and social activities. Irrespective of whether single rooms or entire apartments, they must be within the (building) complex of a farm. All rooms and apartments in a farm are considered as forms of accommodation (Statistics Austria 2019a: 25), which fall into the category of ‘domestic side-line’ and do not fall within the scope of the commercial regulation as long as the following characteristics are fulfilled: (i) provision of a maximum of 10 guest beds (depending on personal and spatial capacities), (ii) no employment of non-household persons, (iii) meals without choice at fixed times (3 times a day), administration of non-alcoholic beverages and alcoholic beverages produced on the landlord’s farm, and (iv) the rooms must be situated within the boundaries belonging to the landlord (Radlgruber 2013: 4).

In Upper Austria a provincial regulation states that three holiday apartments, each with a maximum of four beds without service, do not constitute a commercial activity (Radlgruber 2013: 5). There is no such legal regulation in the other provinces. These beds in holiday apartments are possible in addition to the 10 beds in private guest rooms. In this context, a farmer whose capacity exceeds these limits for private accommodation is a commercial provider (Statistics Austria 2019a: 15-16) and then subject to the rules for guest houses and hotels. This limit for guest rooms (and/or holiday apartments in Upper

Austria) has been arbitrarily drawn to make a distinction for tax purposes. For the sake of differentiating between the ‘farm holiday’ and commercial providers of accommodation investment projects, that fall into the field of agricultural side-lines or through which a farm attains the commercial scale for the first time, are funded within rural development programme 2014-2020 (types of operation 6.4.1). There is a specific support measure for up to 22 beds (Metis 2017: 10 and 15). A distinction has to be made to the other types of accommodation which are summarised under the term ‘other forms of tourist accommodation’ and comprise (i) commercial accommodation (hotels etc.), (ii) private accommodation, apartments and guest rooms not on farm, (iii) other (spa hotels, youth hostels, children and youth hostels, dormitories) and (iv) camping sites (Federal Ministry of Sustainability and Tourism, 2018). In addition, the Austrian Farm Holidays Association (2019 in Streifeneder 2016: 263) defines the farm holiday as follows “Accommodation on a quality-controlled functioning farm with active agriculture and max. 10 guest beds. Guest accommodation is economically and locally linked to the farm. The self-managed agriculture must be clearly visible and dispose of at least 2 ha or at least one livestock unit (LSU) with the necessary forage area.”

It is worth mentioning that there is not a common understanding or operational definition of the term ‘farm holiday’ worldwide or at European Union level. The meaning of ‘farm holiday’ varies depending on geograph-

ical region, although in the European Union it is widely defined as “*the economic multidimensional development of agricultural farms and multidimensional development of rural areas*” (Zoto et al. 2013: 210), and is included in agricultural, social and economic policies in the European Union. The main differences to the Austrian definition can be characterised by the following criteria: (i) the number of beds (e.g. in Italy the national benchmark is up to 10 beds, Veneto and Tuscany up to 30 beds, South Tyrol 8 rooms or 5 holiday apartments; for France the limits are up to 5 rooms with maximum 15 beds; UK holds a limit of up to 4 rooms) and (ii) the length of stay, i.e. overnight or day trip (cf. EuroGites 2010; Streifeneder 2016).

### 3 Materials and methods

Since the aim of this paper is to look at the evolution of the ‘farm holiday’ and ‘other forms of tourist accommodation’ in Austria, comparing the two gives us important insights into their competitive and complementary relationships. As a first step, it is important to examine the statistics showing changes in the number of offers of accommodation, beds and overnight stays, as they reflect the evolution of both the supply (e.g. number of tourist facilities, beds) and the demand (e.g. overnight stays). Data on the supply and demand side has been very well documented yearly since 2000 (Statistics Austria 2018d).

Built on prior research (Dupeyras and MacCallum 2013; International Network on Regional Economics, Mobility and Tourism and World Tourism Organization 2013), the analyses of the ‘farm holiday’ within the tourism sector have inherited a balanced set of indicators measuring their performance. This measurement entails two core types of indicator defined as follows:

- Accommodation capacity (supply side): Documenting the market share and the fluctuations in the number of offers of accommodation and bed capacity provides a perspective on whether the sub-sector is growing or shrinking. A dynamic business sector will stimulate more business births than deaths with competitive businesses growing and replacing inefficient ones. This does not per se give full information on the sector’s status, but is another indicator that when compared with others adds context to the understanding of the national or regional tourism’s competitiveness and resilience (Dupeyras and MacCallum 2013: 52)
- Attractiveness of a destination (demand side): The number of overnight stays in all types of accommodation is a measure of tourism flows (Dupeyras and

MacCallum 2013: 7). On the one hand, the number of overnight stays spent by guests gives an indication of the economic importance of tourism and provides a measure of the pressure that tourism exerts on the environment (local infrastructure, land use, fragmentation and habitat loss, water quality, use of natural resources and others). It also results in the average duration of the stay. On the other hand, this indicator also shows the intensity of tourism. Market share of overnight stays is considered to be a good reflection of the attractiveness of a destination. Consequently, changes in the number of the overnight stays clearly reflect changes in preferences of holiday destination. This indicator can be seen as “*a direct and objective means of assessing success in tourism, with the difference between one year’s figure and the next being a transparent and easily conveyed way of showing growth or decline*” (Dupeyras and MacCallum 2013: 14).

This paper employed secondary data from the most comprehensive official statistics, i.e. Statistics Austria (2019b), which is revised annually. Statistic Austria provides data that shows socio-economic trends in Austrian tourism. The analysis is based on data of the core indicators from 2000 on 2018 represented geographically (Austria and NUTS3 level<sup>1</sup>) in their dynamics. The calculation of market share of the ‘farm holiday’ in terms of the number of accommodation offers and overnight stays is shown as a percentage of the tourism in total. To evaluate the increase or decrease of the indicators the calculation is based on the fixed index method ( $I_{FB} = (X_n/X_0) \cdot 100$ ) and the corresponding changes between the ‘farm holiday’ and ‘other forms of tourist accommodation’. This leads to reflections on whether: (a) farm holidays are more (marked beige), equally or less (marked yellow) effected by changes, i.e. more business deaths than births and less beds and whether (b) farm holidays grow more or less slowly or equally in terms of overnight stays than ‘other forms of tourist accommodation’. The differences in the average changes are evaluated using a t-test. In this context, the data for both the ‘farm holiday’ and ‘other forms of tourist accommodation’ was used to depict region-specific differences. The latter are also illustrated by a plot of the attractiveness (change in number of overnight stays [Diff.

<sup>1</sup> According to the Eurostat definition (Eurostat, 2012), areas with more than 500 inhabitants per km<sup>2</sup> and at least 50,000 inhabitants are considered predominantly urban regions. Intermediate areas are regions with more than 100 inhabitants per km<sup>2</sup> and either at least 50,000 inhabitants or a neighboring predominantly urban region. Most rural areas are those that are neither urban nor intermediary.



F-O)) and accommodation capacity (change in number of accommodation offers [Diff. F-O]) of the data. This illustration uses the graphical competitive positioning according to Gartner's Magic Quadrant. In so doing, the best of both are the 'leaders' and the worst of both are the 'niche players'. The higher values on the x-axis represent the 'pioneers' who have yet to fill their capacity. The higher values of the y-axis represent those in high demand i.e. those challenging the 'leaders'.

The main advantage of the overarching methodology used in this paper is its relatively simple application based on secondary data and the potential to compare the levels between the 'farm holiday' and 'other forms of tourist accommodation'. However, there are some limitations to the proposed methodology. The main limitation is the fact that key economic, social and environmental regional data, the attitude of the guests and the providers are not expressly considered to calculate a comprehensive regional competitive index.

## 4 Results

The volume of tourism in Austria and in a region determines the current and future status of its services for tourists and the locals. This section presents the results of the indicator analysis previously mentioned for the identification of general and specific changes in the developments between farm holidays and 'other forms of tourist accommodation' in Austria.

### 4.1 General overview

Austrian tourism plays an important role in the Austrian economy. Tourism impacts start with expenditures by guests in the local area. The expenditure associated with tourism flows makes an economic contribution. In 2018, tourism made a direct contribution to the economy of € 27.6 million in output value at basic prices or 4.0% of the total output value at basic prices. About € 0.13 million in output value at basic prices or 0.03% of the output value at basic prices came from farm holidays. These proportions have remained roughly stable since 2000 (Statistics Austria, 2018a). Tourism has generated a steady level of around 7.0% of the Gross Domestic Product (GDP) over the last years (Statistics Austria 2018c). This economic importance implies corresponding effects on the employment situation and accounts for 7.4% of direct employment in (Austria (Statistics Austria 2018b; Statistics Austria 2018c).

The direct employment associated with this level of economic activity is about 336.000 jobs in 2018 (Statistics Austria 2018a; Statistics Austria 2018b) and in the case of farm holidays it is around 23.000 jobs (Austrian Farm Holidays Association 2018). All of these impacts are widely distributed among many economic sectors and industries across the economy, such as winter sports (SpEA 2008: 10). The importance of the 'farm holiday' goes far beyond the tourism because of its cross-sectional nature. At the same time, this implies that a loss in one of these sectors could lead to negative consequences for many other industries and companies. Conversely, the lower the leakages from the economy the greater the knock-on effect of the expenditure from tourism on the local economy.

In more detail, in 2018 there were 66,420 tourism offers of accommodation divided as follows: 57.9 thousand 'other forms of tourist accommodation' and 8.5 thousand farms in 2018 compared to 63.2 thousand 'other forms of tourist accommodation' in 2000 and 12.3 thousand farms (Table 1). There were 1.3 million beds in 2018 of which 5% were on farms. The number of beds on farms showed a sharp decrease (-29%), whereas the 'other forms of tourist accommodation' were able to expand their bed capacity by +6.5%. In these accommodation offers there were in total 1.3 million beds in 2000 that expanded by 3.8% to 2018. In 2018, these establishments hosted 44.5 million guests and recorded 148.6 million overnight stays, figures that relate to year-on-year change rates on average from 2000 to 2018 of +70.2% (+31.5%, respectively). For 'other forms of tourist accommodation' the increase from 2000 to 2018 was from 108.2 million to 143.6 million stays or +32.8%. Farm holidays picked up slightly from 4.9 million to 5.0 million stays or +2.7%. The average stay (4.3 nights in 2000) decreased by 22.8% to 3.3 nights in 2018. This development corresponded also to that of the 'other forms of tourist accommodation', whereas the decrease in farm holidays was slight by 14.2% from 6.0 nights in 2000 to 5.1 nights in 2018. The indicators – as beds per farms (+3.4%) versus 'other forms of tourist accommodation' (+16.1%) and stays per bed on farms (+8.0%) versus 'other forms of tourist accommodation' (+21.1%) – showed a very positive development. The former 'other forms of tourist accommodation' made more progress; the latter farms were better off. Despite the fundamentally positive market environment, for example an increase (+44.7%) of guests on farms from 2000 to 2018, the number of farms (-31.2%) fell at a faster rate of change than the 'other forms of tourist accommodation' (-8.4%). This is due to structural changes in agriculture and increased competition in tourism (cf. Statistics Austria 2010; WKÖ 2018). In this context, the area 'other forms of tourist accommodation' is also better

**Table 1:** Select tourism key figures 2000 and 2018 (Statistics Austria 2019c)

	2000	2018	2000-on-2018 change rate (%)
<b>Enterprises</b>	<b>75,627</b>	<b>66,420</b>	<b>-12.2</b>
Other forms of tourist accommodation	63,298	57,953	-8.4
Farm holidays	12,329	8,467	-31.2
<b>Beds</b>	<b>1,296,772</b>	<b>1,345,514</b>	<b>+3.8</b>
Other forms of tourist accommodation	1,205,909	1,281,696	+6.3
Farm holidays	89,863	63,818	-29.0
<b>Arrivals – guests</b>	<b>26,150,208</b>	<b>44,527,010</b>	<b>+70.2</b>
Other forms of tourist accommodation	25,329,319	43,544,582	+71.9
Farm holidays	820,889	982,428	+19.7
<b>Overnight stays</b>	<b>113,060,981</b>	<b>148,585,810</b>	<b>+31.5</b>
Other forms of tourist accommodation	108,159,445	143,550,324	+32.8
Farm holidays	4,901,556	5,035,486	+2.7
<b>Beds per accommodation</b>	<b>17,134</b>	<b>20,528</b>	<b>+18.2</b>
Other forms of tourist accommodation	19.051	22.116	+16.1
Farm holidays	7.289	7.537	+3.4
<b>Overnight stays per bed</b>	<b>23.991</b>	<b>29.226</b>	<b>+21.8</b>
Other forms of tourist accommodation	24.670	29.881	+21.1
Farm holidays	14.886	16.077	+8.0
<b>Average stay</b>	<b>4.324</b>	<b>3.337</b>	<b>-22.8</b>
Other forms of tourist accommodation	4.270	3.297	-22.8
Farm holidays	5.971	5.126	-14.2

off in the development of guests' arrivals (+71.9%) and overnight stays (+32.8%) than farms (+19.7% and +2.7%, respectively).

As pictured for the statistics on overnight stays, there are yearly fluctuations. Figure 2 shows the development of overnight stays of farm holidays, 'other forms of tourist accommodation' and in total. In 2018, the farm holidays accelerated to a 4.7% growth (-0.6% in 2017), with 5,035.5 thousand overnight stays (+228.1 nights compared to 2017). This growth level was the most significant of the years observed. The 'other forms of tourist accommodation' also accelerated growing by 3.4% (+1.6% in 2017) and reached 143.6 million overnight stays (with an increase of 4.8 million). In the years from 2000 to 2014 farm holidays made up around 4.0% of the overnight stays and from 2004 to 2018 it was around 3.4%. In addition, the development of 'other forms of tourist accommodation' corresponds to those of the overnight stays in total; this is attributable to the high share of 'other forms of tourist accommodation'. Despite the yearly fluctuations, there has been a continuous, even increasing trend in the overnight stays both for farm holidays and for 'other forms of tourist accommodation'. This notwithstanding, the fluctuations in farm hol-

idays are significantly stronger than those of 'other forms of tourist accommodation'.

So far, basic data has been provided at the national level, but the tourism of Austria is distinguished for its differentiated environment and is deemed to be location-based. This in itself indicates the importance of an understanding of the role that farm holidays play in rural areas. This idea is developed further in the next sub-sections.

## 4.2 Regional characteristics

The main tourism areas lie predominantly in the rural regions in the west and south of Austria, which is consistent with the division into intensive and extensive tourism regions (Smeral 2013: 5). The contribution of the 'farm holiday' is a modest one. The higher concentrations of farm holidays happen near the wealthiest tourist areas of the alpine region and tend to take place in non-urban regions (Figure 3).

A similar picture emerges for farm holidays. As shown in Figure 4, the density of farm holidays changes from province to province as well as from region to region with

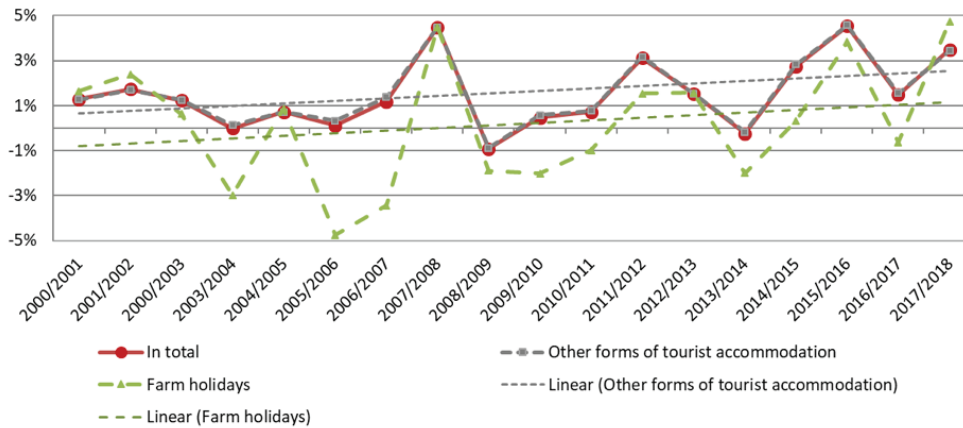


Figure 2: Overnight stays – year-on-year change rates in % from 2000/2001 to 2017/2018 (Statistics Austria 2019b)

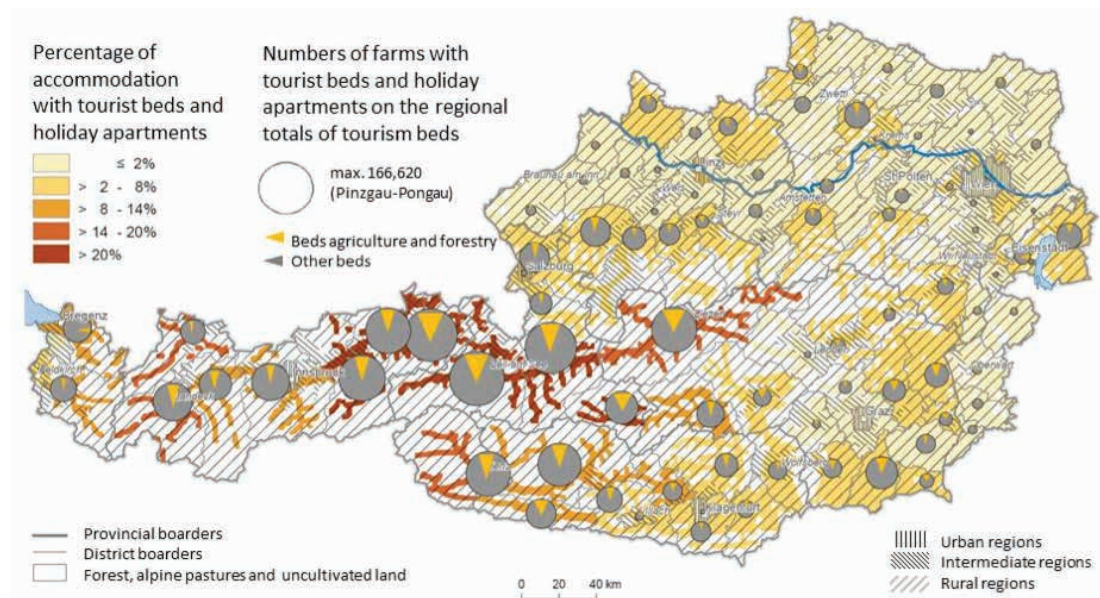


Figure 3: Regional statistics of tourism 2010 – number of tourist beds (totals and farms) by districts and NUTS3 regions (Statistics Austria 2012)

a high concentration in the west and south of Austria. The typical areas for farm holidays are located in Upper Carinthia, Pinzgau/Pongau in Salzburg, Tiroler Unterland and the region around Liezen in Upper Styria. Furthermore, the rural regions, especially the alpine regions enjoy the highest density of farm holidays. The fact, that disadvantaged areas are mostly favoured by tourists as destinations both in terms of farm holidays and ‘other forms of tourist accommodation’ is confirmed by the distribution of the providers. In this respect, more than 50% of all farm holidays take place in the mountainous areas of Tyrol, Carinthia and Styria (Figure 4; cf. personal conversation Embacher 2012). Without agriculture, most of these highland areas would be covered in forest. In areas with intensive agricultural production, such as Lower Austria and Burgenland, there are less accommodation offers and

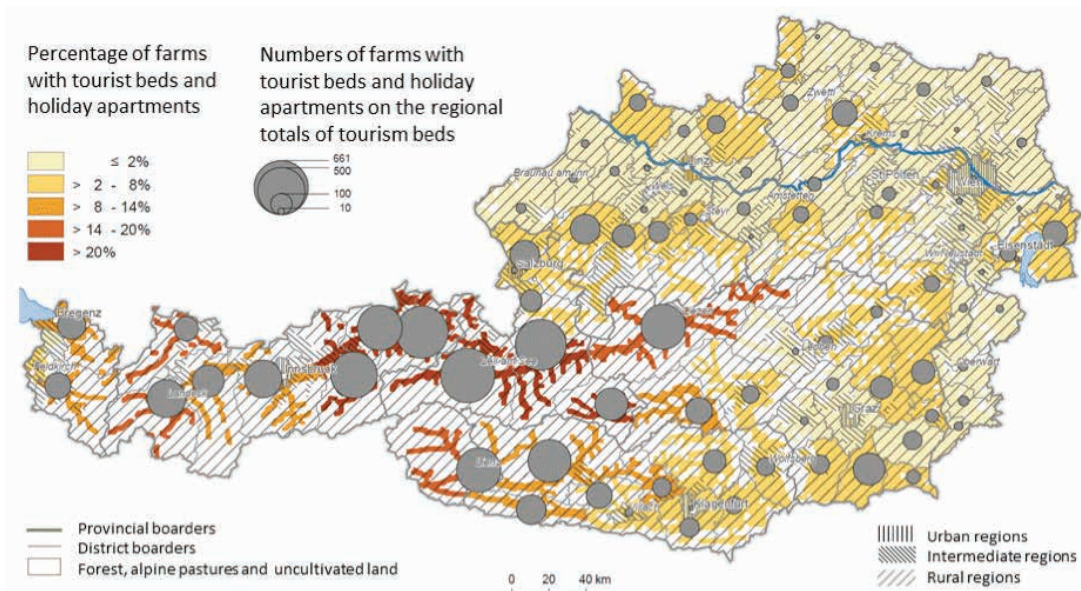
hardly any farms that offer farm holidays (Figure 4; cf. Federal Ministry of Sustainability and Tourism 2012: 17; personal conversation Embacher 2012)

## 4.3 Supply and demand

### 4.3.1 Accommodation capacity

From 2000 to 2018 the overall market share of Austria showed a decrease in terms of accommodation offers from 16.3% to 12.8% and beds from 6.9% to 4.9% (Table 2). The intermediate and rural region of Lower Austria and the urban region of Tyrol gained in market share (Table 3). Although the intermediate region of Burgenland was not able to gain market share in terms of farm holidays, the





**Figure 4:** Farm Structure Survey 2010 – number of tourist beds and farms by districts and NUTS3 regions (Statistics Austria 2012: slide 39; Statistics Austria 2013: 124)

number of beds increased. An analysis of the data showed that the three urban regions of Carinthia, Styria and Tyrol evolved more positively than the Austrian average did. One intermediate region (Salzburg) and four rural regions (Burgenland, Carinthia, Styria and Tyrol) recorded a decline in the market share of above the average Austrian decrease. In terms of number of beds there were six regions (intermediate region of Salzburg and rural regions of Burgenland, Carinthia, Upper Austria, Styria and Vorarlberg)

showing a more negative development than the Austrian average.

The shift in development dynamics of accommodation offers and beds shows that the bed capacity of holiday farms decreased less or gained less weight. The concentration based on the bed capacity is much stronger for the 'other forms of tourist accommodation' than for farm holidays. The regional distribution is as follows: Despite the fact that the number of beds of intermediate region overall gained weight, the bed capacity of Burgen-

**Table 2:** Market share of farm holidays in terms of the number of accommodation offers and beds as well as the numbers of beds per farm and 'other forms of tourist accommodation' by NUTS3 regions, 2000 and 2018 (Statistics Austria 2019c)

	Market share (%) of farm holidays numbers of accommodation offers			Market share (%) of farm holiday beds			Beds per farm			Beds per other forms of tourist accommodation		
	2000	2018	Diff.	2000	2018	Diff.	2000	2018	Diff.	2000	2018	Diff.
<b>Austria</b>	16,346	12,818	-3,528	6,911	4,932	-1,979	7,191	7,431	0,240	18,927	21,059	2,132
<b>Urban regions</b>												
Carinthia	3,911	1,754	-2,156	0,789	0,376	-0,413	8,286	7,000	-1,286	42,384	33,085	-9,299
Styria	2,614	1,546	-1,068	0,415	0,326	-0,090	10,000	8,000	-2,000	64,342	38,476	-25,866
Tyrol	0,000	0,495	0,495	0,000	0,117	0,117	0,000	10,000	10,000	61,082	42,592	-18,490
<b>Intermediate regions</b>												
Burgenland	4,651	3,922	-0,730	0,709	0,952	0,242	9,167	8,667	-0,500	62,602	36,816	-25,785
Carinthia	8,111	6,782	-1,329	3,128	2,181	-0,947	7,782	7,735	-0,047	21,272	25,240	3,968
Lower Austria	7,389	9,305	1,916	1,777	1,980	0,204	7,229	7,274	0,045	31,886	36,941	5,055
Upper Austria	7,302	5,998	-1,304	2,369	1,991	-0,378	6,609	7,495	0,887	21,450	23,538	2,088
Salzburg	21,394	14,270	-7,124	7,850	5,594	-2,255	6,694	7,814	1,120	21,386	21,949	0,562
Styria	11,099	10,667	-0,432	2,686	1,597	-1,089	6,621	6,703	0,082	29,955	49,331	19,376
Tyrol	12,686	12,657	-0,029	5,361	4,562	-0,799	6,777	7,316	0,539	17,383	22,177	4,794
Vorarlberg	5,006	2,965	-2,041	1,441	0,856	-0,585	6,481	7,625	1,144	23,359	26,972	3,613
<b>Rural regions</b>												
Burgenland	20,000	13,816	-6,184	6,927	3,555	-3,372	10,676	7,115	-3,561	35,861	30,950	-4,911
Carinthia	15,739	11,954	-3,785	6,466	4,383	-2,083	6,961	6,839	-0,122	18,809	20,258	1,449
Lower Austria	19,551	20,386	0,835	6,485	6,540	0,055	6,818	6,781	-0,037	23,896	24,814	0,919
Upper Austria	23,343	20,912	-2,431	9,309	7,265	-2,044	7,457	7,506	0,049	22,120	25,333	3,213
Salzburg	17,944	16,840	-1,105	8,826	7,192	-1,634	7,240	8,028	0,787	16,356	20,975	4,619
Styria	23,896	18,560	-5,336	11,643	8,141	-3,502	7,154	7,502	0,349	17,046	19,293	2,246
Tyrol	16,195	12,423	-3,771	7,713	5,567	-2,147	7,097	7,298	0,201	16,408	17,563	1,155
Vorarlberg	10,151	7,332	-2,819	6,610	3,619	-2,991	7,832	7,386	-0,446	12,502	15,563	3,062



land and Carinthia declined for the farm holidays and also for 'other forms of tourist accommodation' in Burgenland. 'Other forms of tourist accommodation' increased the bed capacity in all rural regions whereas in the case of the farm holidays Upper Austria, Salzburg, Styria and Tyrol increased their capacity. Austrian tourism, especially farm holidays, has different development characteristics in terms of accommodation offers, beds and overnight stays in their regional diversity. This forms the basis for the competitive position realised and the respective development dynamics.

#### 4.3.2 Attractiveness of a region

The development of the number of overnight stays and the duration of the stay is negative. For Austria overall as shown in Table 3, the market share of the 'farm holiday' according to overnight stay is declining more sharply (-0.9) than the average duration of the stay by tourists (farm holidays -0.7 and 'other forms of tourist accommodation' -0.5). The length of the holiday on the farm is on average 1.5 times longer than that booked for 'other forms of tourist accommodation'. The average length of a farm holiday is six days and four days in the case of 'other forms of tourist accommodation'. Although in Austria hol-

idays on farms are on average longer, the average change from 2000 to 2018 decreased more sharply (-0.7) than the change for 'other forms of tourist accommodation' (-0.5).

At the regional level, the market share of the 'farm holiday' shows a positive development in intermediate and rural region of Lower Austria and the intermediate region of Burgenland, Carinthia and Tyrol. The average duration of the stay on farms is declining in the rural regions, ranging from -0.03 to -4.4. For 'other forms of tourist accommodation' the range is from -0.04 to -2.1. Moreover, at the regional level there are difference in the length of the holiday on farms and 'other forms of tourist accommodation'. For example, in the Lower Austrian's intermediate region tourists stay on average 1.1 nights but 2 nights in 'other forms of tourist accommodation'. On the contrary, in the rural region of Styria tourists spend an average of two days on a farm and six days in 'other forms of tourist accommodation'. The findings paint an interesting picture at the regional level. Farm holidays have gained more in their attractiveness in the intermediate regions than in the rural regions. In the rural regions, 'other forms of tourist accommodation' were better off.

**Table 3:** Market share of farm holidays in terms of the number of overnight stays and the average duration of the stay (in days) for farm holidays and 'other forms of tourist accommodation' by NUTS3 regions (Statistics Austria 2019c)

	Overnight stays			Average duration of the stay (days)			Average duration of the stay (days)		
	Market share (%) of farm holidays			farm holidays			other forms of tourist accommodation		
	2000	2018	Diff.	2000	2018	Diff.	2000	2018	Diff.
<b>Austria</b>	4.335	3.388	-0.948	6.339	5.650	-0.689	4.348	3.868	-0.481
<b>Urban regions</b>									
Carinthia	-	-	-	-	-	-	2.092	2.015	-0.077
Styria	-	-	-	-	-	-	1.864	1.848	-0.016
Tyrol	-	-	-	-	-	-	1.787	1.800	0.013
<b>Intermediate regions</b>									
Burgenland	0.000	0.000	0.000	2.118	1.424	-0.694	2.003	2.266	0.263
Carinthia	0.000	0.012	0.012	5.006	4.518	-0.489	4.114	3.303	-0.811
Lower Austria	0.012	0.014	0.002	1.087	1.092	0.005	2.135	2.089	-0.046
Upper Austria	0.010	0.005	-0.004	3.711	4.748	2.827	2.836	3.338	0.503
Salzburg	0.097	0.077	-0.020	5.521	8.565	0.432	4.477	4.569	0.093
Styria	0.006	0.005	-0.001	2.174	2.280	0.106	3.390	2.715	-0.675
Tyrol	0.137	0.140	0.003	5.491	5.613	0.122	5.006	4.474	-0.532
Vorarlberg	0.017	0.000	-0.017	3.760	3.770	0.010	4.173	3.705	-0.469
<b>Rural regions</b>									
Burgenland	0.098	0.040	-0.059	1.565	1.534	-0.030	1.788	1.738	-0.049
Carinthia	0.424	0.222	-0.202	7.823	7.352	-0.470	10.143	8.703	-1.439
Lower Austria	0.131	0.155	0.025	7.576	5.982	-1.594	4.220	3.528	-0.692
Upper Austria	0.255	0.196	-0.060	8.133	4.994	-3.139	5.811	3.727	-2.084
Salzburg	0.891	0.853	-0.038	8.218	3.811	-4.407	4.740	3.894	-0.846
Styria	0.629	0.372	-0.256	2.523	2.061	-0.461	6.707	5.791	-0.916
Tyrol	1.354	1.123	-0.231	7.985	7.011	-0.974	8.520	7.834	-0.685
Vorarlberg	0.240	0.156	-0.084	8.858	7.822	-1.036	5.073	4.480	-0.593

- no data available

### 4.3.3 Interplay of supply and demand

When contrasted the performance of farm holidays versus 'other forms of tourist accommodation', Table 4 depicts that farm holidays were more effected by changes as it had more business deaths than births (difference farm holiday minus 'other forms of tourist accommodation' is -1.5,  $p < 0.05$ ). Overnight stays show the same development (difference farm holiday minus 'other forms of tourist accommodation' is -1.4,  $p < 0.05$ ). 'Other forms of tourist accommodation' also increased their bed capacity faster, but farm holidays increased the overnight stay per bed significantly more than 'other forms of tourist accommodation' did (difference farm holiday minus 'other forms of tourist accommodation' is +2.0,  $p < 0.05$ ).

In terms of the number of farms, Lower Austria (intermediate and the rural regions) showed a smaller change in farm holidays than 'other forms of accommodation'. In the urban and intermediate regions of Styria farm holidays were less affected by changes. Also Tyrol's and Lower Austria's intermediate regions as well as Lower Austrians rural regions were marked by a more positive change than 'other forms of tourist accommodation'. On the one hand, the change in the overnight stays is smaller but also negative. In comparison to the market share, more intermediate regions show a positive change, namely also Vorarlberg, Upper Austria and Carinthia. The latter change cannot be observed for the number of beds but otherwise the development of the beds corresponds to those

of the farm holidays. On the other hand, farm holidays improved significantly in terms of the overnight stays per bed. According to the difference in the change between the 'farm holiday' and 'other forms of tourist accommodation' only two regions, namely the intermediate and rural region of Lower Austria show a negative development in the overnight stays per bed, whereas in all other regions the 'farm holiday' is better off than 'other forms of tourist accommodation'.

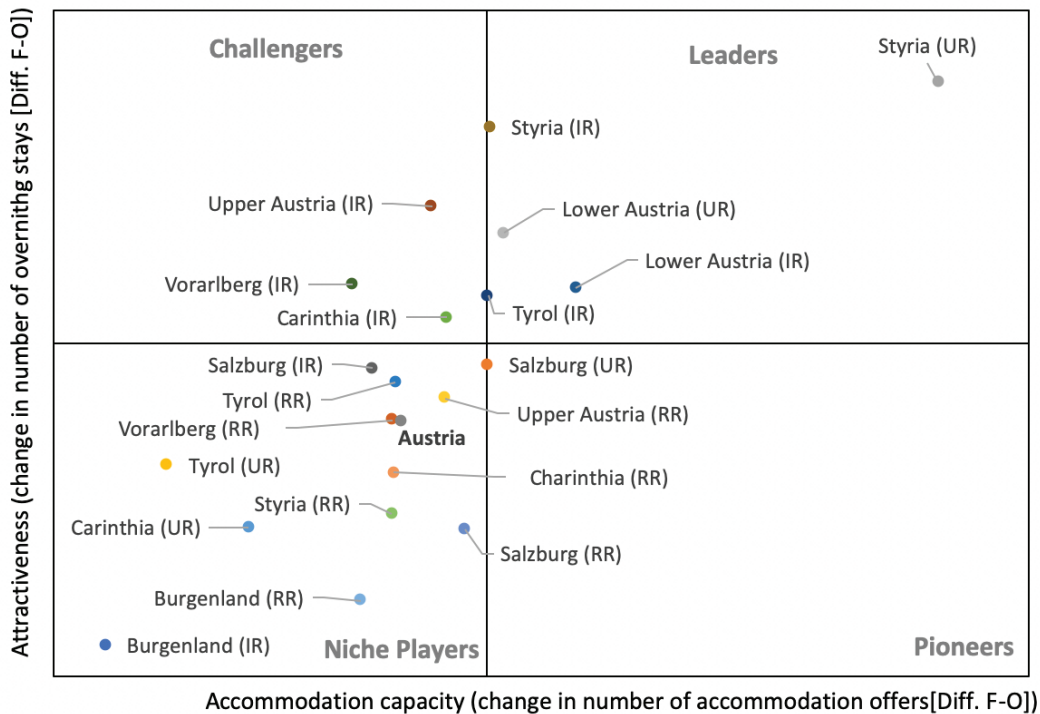
### 4.3.4 Interplay of supply and demand

With a view to understanding more on the relative positions of the different regions Figure 5 shows that the best of both axes are Styria (UR) and (IR), Lower Austria (RR) and (UR), which can be considered the 'leaders'. Burgenland (IR) and (RR), Carinthia (UR) and (RR), Salzburg (IR) and (RR), Styria (RR), Upper Austria (RR), Tyrol (UR) and (RR), Vorarlberg (RR) and Upper Austria (RR) display the lowest values on both axes and are therefore the 'niche players'. It follows that these regions have room for improvement and can learn from the 'leaders'. It also figures that the 'challengers' have the potential to increase their capacity in terms of offer while the 'pioneers' could work on the attractiveness of their offer in order to exploit their full capacity. This also applies to Austria as a whole. Conversely, Carinthia (IR), Vorarlberg (IR) and Upper Austria (IR) are the 'challengers'. Surprisingly, there are

**Table 4:** Change (% , 2000 on 2018) in the characteristics 'number of accommodation offers' and 'overnight stay per bed' for farm holidays and 'other forms of tourist accommodation' by NUTS3 regions (Statistics Austria 2019c)

	Numbers of accommodation offers				Overnight stays				Overnight stays per bed			
	Change rate (% , 2000 on 2018)				Change rate (% , 2000 on 2018)				Change rate (% , 2000 on 2018)			
	Farm holidays	Other forms of tourist accommodation	p value	Diff. F-O	Farm holidays	Other forms of tourist accommodation	p value	Diff. F-O	Farm holidays	Other forms of tourist accommodation	p value	Diff. F-O
<b>Austria</b>	-1.837	-0.268 *	0.000	-1.569	0.185	1.598 *	0.002	-1.413	1.694	-0.310 *	0.000	2.004
<b>Urban regions</b>												
Carinthia	-2.831	1.579 *	0.007	-4.409	-1.852	1.466	0.106	-3.318	5.160	0.339	0.121	4.820
Styria	13.981	5.654	0.296	8.327	8.333	3.649	0.291	4.685	5.324	-2.232	0.208	7.556
Tyrol	-3.241	2.667 *	0.037	-5.908	0.000	2.205	-	-2.205	3.367	-0.340	0.104	3.707
<b>Intermediate regions</b>												
Burgenland	-5.965	1.065	0.249	-7.030	-3.254	2.190	0.333	-5.443	5.242	3.625	0.453	1.617
Carinthia	-2.420	-1.675	0.370	-0.745	0.374	-0.097	0.448	0.471	3.370	1.559	0.246	1.811
Lower Austria	2.091	0.452	0.876	1.639	4.680	2.749	0.360	1.931	-1.729	-1.219	-0.378	-0.510
Upper Austria	-1.202	-0.185 *	-0.732	-1.018	3.472	1.012	0.267	2.460	1.015	-0.236	0.698	1.251
Salzburg	-2.403	-0.290 *	0.021	-2.113	1.327	1.775	0.158	-0.448	1.715	-0.333 *	0.013	2.049
Styria	1.588	1.537	0.490	0.051	7.510	3.614	0.355	3.897	-1.032	-3.203	0.235	2.170
Tyrol	-1.746	-1.766	0.490	0.020	1.801	0.944	0.231	0.857	1.432	0.470	0.123	0.962
Vorarlberg	-3.212	-0.725	0.155	-2.488	3.452	2.387	0.484	1.065	3.543	0.217	0.141	3.327
<b>Rural regions</b>												
Burgenland	-1.092	1.237	0.100	-2.329	-3.230	1.419 *	0.010	-4.649	4.228	-0.321	0.066	4.548
Carinthia	-2.999	-1.276 *	0.008	-1.723	-1.995	0.338 *	0.000	-2.333	3.357	0.916 *	0.043	2.441
Lower Austria	0.033	-0.287	0.312	0.319	2.622	0.637 *	0.028	1.985	0.082	0.094	0.493	-0.012
Upper Austria	-1.834	-1.065	0.060	-0.769	0.063	1.058 *	0.039	-0.995	1.877	0.359 *	0.028	1.518
Salzburg	-1.154	-0.738	0.212	-0.415	-1.295	2.058 *	0.000	-3.353	0.626	-0.333 *	0.038	0.960
Styria	-1.793	-0.030 *	0.000	-1.764	-1.312	1.768 *	0.000	-3.080	1.573	-0.637 *	0.000	2.210
Tyrol	-2.069	-0.374 *	0.000	-1.695	0.569	1.279	0.167	-0.710	1.967	0.004 *	0.000	1.963
Vorarlberg	-2.924	-1.172	0.157	-1.752	-0.697	0.699	0.184	-1.396	3.801	0.045 *	0.013	3.756

\* statistically significant ( $p < 0.05$ ) between farm holidays (F) and 'other forms of tourist accommodation' (O), Vienna no holiday farms.



**Figure 5:** Plot of NUTS3 regions by attractiveness (change in number of overnight stays [Diff. F-O]) and accommodation capacity (change in number of accommodation offers [Diff. F-O]) (own illustration, UR urban region, IR intermediate region and RR rural region)

no ‘pioneers’ but Salzburg (UR) lies on the cusp between being a ‘niche player’ and a ‘pioneer’. The regions Tyrol (IR) and Styria (IR) are also situated on the cusp of ‘challenger’ and ‘leader’. Generally, the ‘leaders’ will remain or become more dominant in the future.

## 5 Discussion on the resilience of Austrian farm holidays and its further research

Farm holidays are often shown as having development potential not only for the farms themselves but also for the surrounding rural areas. As the development over time shows, the ‘farm holiday’ is a niche market and is not the panacea to the economic woes of Austrian agriculture or rural Austria or Austrian tourism. It does, however, represent another alternative use of farm resources, which farmers can possibly exploit to make the most of their farm resources and increase revenues (cf. Arnold and Staudacher 1981: 8f). In this sense, farm holidays can be seen as a complementary enterprise; they do not offer strong competition to ‘other forms of tourist accommodation’. Given the existence of the other three quadrants (leaders, challengers and pioneers) found at regional level

there is a clear need to investigate the reasons behind the respective positions in the development.

The change in the number of farms and beds found show a certain capacity in each region. The ‘farm holiday’ as a niche market, especially in urban regions, does not develop without any risk. The increasing quality standards and tourist demands, the (over)improvement of tourist infrastructure and the commercialisation of the farm might distort the original idea of the ‘farm holiday’ (personal conversation Embacher 2018). In Austria, tourism has been trying for decades to influence positively the economic development of rural areas cf. Gattermayer 1992: 30). Different administrative (e.g. rules of the Austrian Farm Holidays Association) and political (conditions of funding within the rural development programme) factors reinforce this niche market of farm holidays. They probably act as a restraint against a transformation into an extreme form of the ‘farm holiday’ that is closer to mass activities. One might conjecture that only those activities, events and festivals related to farm holidays which are based on originality and authenticity will prosper in the future (Trunfio et al. 2006; Wicks 2001). Yet, analysis performed may suggest that an improvement of the image of the ‘farm holiday’ in the quadrant of the pioneers might help compensate for the shortfall in demand and thereby balance the overload amidst the challengers, which would potentially enable a shift on both sides to join the



leaders. More focus on the particular qualities of the local settings for more specialised forms of farm holidays are required as the competition for tourists today is considerably higher than 20 or 30 years ago (Embacher 2003). The best chances to obtain higher profits come from rural areas which are more accessible to guests from urban centres nearby. Further research into concrete ways of facilitating this shift might include the concept of bio-districts as models designed to integrate not only farming but also the ‘farm holiday’ per se into regional resilience and development strategies. A bio-district is a geographical area where farmers, citizens, tourist operators, associations and public authorities enter into an agreement for the sustainable management of local resources, which is based on the principles and methods of organic farming and agro-ecology (AIAB n.d.).

Data showed that the ‘farm holiday’ is seen to do best near the most attractive tourist areas of the alpine region. Moreover, farm holidays are often located in marginal or disadvantaged areas where there is no other possible service, or no service at the same price. Although these areas also have room for other forms of rural tourism, they will be affected by changes within the sector, especially related to overall decrease in accommodation, increase of number of beds and overnight stays as this study found. Shrinkages in the tourism must be expected due to fewer overnight stays in some regions, while others are doing very well. As succeeding in tourism gets more difficult, offering farm holidays will not necessarily appeal to the farm successors (cf. Maude and van Rest 1985; Smeral 2013), which may explain the greater decrease of farm holidays (31.2%) from 2018 to 2000 as compared to ‘other forms of tourist accommodation’ (8.4%). The further development of farm holidays and other forms of tourism is crucially dependent on macroeconomic trends and income development in the countries of guest origin. In addition, relative prices, transport costs, attractiveness of the offer, taste trends, accessibility, marketing activities or the level of tourism intensity play an important role. This notwithstanding farm holidays are complementary to the other forms of tourism (such as ‘other forms of tourist accommodation’) and they are one mosaic within the (rural) tourism in Austria.

This paper gives insights into the average change of the market share of farm holidays in terms of number of farms, beds and overnight stays. However, one should keep in mind that the fluctuations between the years have not been analysed. As such, future studies could consider other methods such as analysis of timelines and case studies that serve to clarify the links between local developments and driving factors as well as differences across

cases so as to identify best practises. The ‘farm holiday’ is a complex phenomenon (Faulkner and Russell 1997; Fennell 2002; Hall 1995; McKercher 1999; Swarbrooke 1999) and research continues to focus also on its inherent complexity including values associated with nature (Carley and Christie 2000). In practice, the complex nature of the ‘farm holiday’ is not readily understood when this separation of nature and values occurs. One of the complexities of understanding the (sustainable) nature of the ‘farm holiday’ is that (natural, economic, social and cultural) resources utilised for tourism tend to be common pool resources, involving diverse stakeholders (of the value chain) with differing value systems (cf. Bosselman et al. 1999; Holden 2005). People’s values and perceptions of a given resource will influence the pathways of the further development of farm holidays. At the most basic level, there is a need to understand stakeholders, their values, perceptions and visions prior to developing ‘farm holiday’ goals or implementing planning and management processes. The farm holiday has its own characteristics. Given the shift in the consumer’s needs and the possible extent of a new (side-line) business the challenges and potential areas for action are manifold. Firstly, they require the analysis of the functionality, potential and innovation within Austrian regions, also including the interactions between the different NUTS3 regions or local tourism attractions. Secondly, the ‘farm holiday’ definitely has an impact on more than one value chain, for example within the tourist sector, agricultural sector, nature, and infrastructure. Furthermore, the intersectional nature of the ‘farm holiday’ calls for other fields of research to investigate the links to food security, climate change, and political relevance to name a few.

## 6 Conclusion

The phenomenon of the ‘farm holiday’ was developed originally to bring additional income to the farm. Although farm holidays may offer an opportunity for farmers to increase on-farm revenue, these activities are not suited for every farm or farmer. As defined in this paper, the ‘farm holiday’ is an additional business paradigm for many farmers, requiring a shift from a production-centric focus to a focus on service and hospitality. To a certain extent, this paper shows that the ‘farm holiday’ has had successes that have even led to changes at both farm and regional level. These results clearly show that the farm holiday has become, or is becoming, a viable niche market despite an

obvious decline due to changes in structural policy and market.

The development and changes identified in the farm holiday sector, especially in the urban and intermediate regions, is another expression of the fact that the pace of the renewal or innovation process is very important. Furthermore, the comparison of the development of farm holidays versus 'other forms of tourist accommodation' implies areas where the farm holidays could expand this niche especially by learning from the area 'other forms of tourist accommodation'. Moreover, the regional positioning of the 'farm holiday' would also suggest exploiting learning and improvement potentials with a view to facilitating a shift from the quadrants 'challenger' and 'pioneer' towards that of the leadership.

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