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# SLOVAK AND AUSTRIAN TOURISM STRATEGIES AND PRODUCTS

## Stratégie a produkty cestovního ruchu na Slovensku a v Rakúsku

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### Annotation

Statistical results of tourism in Slovakia over the past 20 years are the direct and exact proof of an insufficient implementation of a strategy in comparison with Austrian results in tourism. Strategies as a set of practical measures in tourism are presented in the form of a tourism policy. The aim of this paper is to analyse main strategies in Slovak and Austrian tourism and key statistical figures from tourism in both countries on the demand side. These strategies and statistical figures from both countries are an important and significant element for correct analysing of potential and successful development in both countries. In this international competition has Slovakia many problems with effective strategies and with the stabilisation of the source markets. The article uses a literary method for the analysis of available relevant book and magazine sources, a method of analysis of statistical series, a method of scientific abstraction, induction and deduction on the method of comparison for tourism strategies and statistics of Austria and Slovakia. The result of this comparison is a finding of similarity of products and problems in the structure of the source markets.

### Key words

tourism strategy, tourism statistics, Slovakia, Austria

### Anotace

Štatistické výsledky cestovního ruchu na Slovensku za posledných 20 rokov sú priamym a presným dôkazom nedostatočnej realizácie trhovej stratégie v porovnaní s rakúskymi výsledkami v cestovnom ruchu. Stratégia ako súbor praktických opatrení v cestovnom ruchu je prezentovaná vo forme politiky cestovního ruchu. Cieľom príspevku je analyzovať hlavné stratégie cestovního ruchu v SR a Rakúsku a kľúčové štatistické údaje o cestovnom ruchu v oboch krajinách na strane dopytu. Tieto stratégie a štatistické údaje z oboch krajín sú dôležitým a významným prvkom pre správnu analýzu potenciálneho a úspešného rozvoja v oboch krajinách. V tejto medzinárodnej konkurencii má Slovensko veľa problémov s účinnými stratégiami a so stabilizáciou zdrojových trhov. Príspevok využíva literárnu metódu na analýzu dostupných relevantných knižných a časopiseckých zdrojov, metódu analýzy štatistických radov, metódu vedeckej abstrakcie, indukcie a dedukcie na metódu komparácie na porovnanie stratégií a štatistických údajov cestovního ruchu Rakúska a Slovenska. Výsledkom tohto porovnania je zistenie o podobnosti produktov a problémoch v štruktúre zdrojových trhov.

### Klíčová slova

stratégia cestovního ruchu, štatistika cestovního ruchu, Slovensko, Rakúsko

**JEL classification:** Z32, Z 38

## 1. Introduction

The development of strategic management theory is directly related to the development of systems theory, which in the terms of tourism is applied in the form of „systematic tourism theory“. Since tourism is considered primarily as a systematic phenomenon, its operation must meet all systemic features. Otherwise it is impossible to achieve long-term success even in terms of Slovakia as a tourist destination. Premature enjoyment

of economic upswing before 2008 ended with the arrival of the crisis. Decrease in the number of guests in accommodation in 2008 was by 30%, similar to the number of overnight stays, sales in hotels, restaurants and other tourism businesses. Results deriving from the available statistics are a direct proof of the impossibility of long-term development of tourism without a strategy.

The opposite example is Austria, which, based on available statistics recorded only a slight decrease in the number of guests, overnight stays and revenue went up 3%. More than 120 million overnights, and the balance of tourism reaching 10€ billion and 700 thousand jobs in tourism in Austria is a direct and exact proof of the need for long-term and purposeful promotion of selected tourism marketing strategy, including taking into account the systematic principle of tourism as an economic phenomenon. A tourism strategy would ultimately bring satisfaction through customer demand and evaluation of the primary and secondary tourism offers and significant economic benefits for the economy of the state and its regions.

Strategies are bringing a long-term competitive advantage in tourism, which means stabilized markets and products. A substantial fact for the creation of successful strategies is the comparison of the main products that countries offering on the market internationally in the context of the market in which they operate. In doing so, less developed countries need to invest not only in tourism products but also in infrastructure, which is usually undeveloped. This infrastructure is also the cause of a lack of interest in the country (Pedrana, 2013). The offered product is the basis for the interest of individual market groups on an international scale

System theory arose at a time when a majority of the strategic management principles, as we know it today, was formed. Strategic management influenced primarily the emphasis of the status of strategic analysis and the choice of specific strategies in connection with the circumstances in which a single firm is located. The issue of strategic analysis is associated with assessments of the impacts both superior and associated systems in terms of system theory, selection of a particular model, strategy is a response to the presumption of tourism as a system to succeed in a competitive market (Balážová, Papcunová, Jarábková, 2007). Therefore it is necessary to state that any other understanding of strategic management applications in terms of tourism management is unacceptable and is not based on respect of fundamental theoretical principles of managerial science. The aim is to improve the competitive position of Slovakia as a tourist destination, GDP growth, employment and balancing inter-regional differences.

The proof of strategic management applications to theory and practice of tourism are successful tourism policy in different countries of Europe and the world. Tourism policy has become a tool for strategic management enforcement with the main output in the form of strategies, which preceded the formulation of mission, objectives, analysis of an internal and external environment, defining the strengths and weaknesses, opportunities and threats (Jarábková, Majstříková, 2016a). All the components of strategic management can be found in various documents of national or regional institutions which have an impact on tourism management.

The fragmented industry consists of many small organizations. Characteristic feature is that none of the organizations holds significant market share. In the market any entrepreneurial subject in the role of a leader who would fundamentally set the rules of the competition does not exist.

Industry can become consolidated through the concentration of capital in dependence on various factors, however many industries remain fragmented for a longer time. To create a strategy is one of the most important characteristics typical for this process (Jarábková, Majstříková, 2016b). It is a decision-making process, which consists of finding ways in which strategic objectives can be achieved. There are many ways to meet strategic objectives and changes in the views and approaches in the case of failures of strategy.

## 2. Types of strategies in tourism

In tourism, it is necessary to apply in along all three strategic levels. More than anywhere else the principle of long duration and consistency is valid here. It is also valid for the strategy in terms of its implementation and effects,

**Tab. 1: The application of strategies according to strategic management to the conditions of tourism**

Theory of strategic management	The application on tourism
Enterprise strategy - 4 strategies of product – market matrix strategy of stabilization, development, deceleration	National level = Market strategies of the first level - 4 strategies of product – market matrix - strategy of stabilization, development, deceleration
(simultaneous application of functional strategies)	(simultaneous application of functional strategies)
Business strategies  1. Contingency approach - Hofer 's model of product life cycle phase 2. Generic approach - Porter's competition strategies (cost management, differentiation strategy, specialization strategy)	Regional and local level = Market strategies of the second level 1. Contingency approach - Hofer 's model of product life cycle phase  2. Generic approach - Porter competitive strategy (cost management, differentiation strategy, specialization strategy)
(simultaneous application of functional strategies)	(simultaneous application of functional strategies)
Functional strategies - Marketing - Production of services and products - Employees - Finances	Enterprise strategies Functional strategies - Marketing - Production of services and products - employees - finances
Without concurrent application	(simultaneous application of functional and enterprise strategies in connection with national and regional level)

Source: Own processing based on the theories of strategic management and theories of tourism

It goes without saying that what applies at the enterprise level also applies at the state and its regions. These are strategies of the first level. In management of tourism in Slovakia at the national level is based on the product-market matrix and based on it select one of four possible strategies. Based on this initial selection it is then necessary to proceed to the strategy development, preservation stabilization or decay (Kostková, 2010). While fulfilling a product – market matrix in terms of key products – as a product, we define in terms of key products, which Slovakia offers to the international tourism market and in terms of marketing to key markets, the most interesting for Slovakia are in terms of the number of guests, overnight stays, average number of nights, and the average spending per guest. Given the fact that tourism products in Slovakia are given and cannot be changed in the short term, it is necessary to choose the strategy of stabilization, growth or decay and focus on target markets.

Strategies of the second level are linked to these main types of market strategies, in theory of strategic management they are also called business strategies. They also deal with the issue of how we will compete in a particular type of product or in a particular market (Kostková, Botlíková, 2014). The purpose of the strategy of the second level is to gain a competitive advantage over rivals. The offer of the opponents can be beaten by different products that offer products at a lower price, or a combination of these two sources. The main market strategy is based on a product – market matrix at the enterprise/business level and at its business unit is filled with competitive strategies so that each business unit offers a product that is competitive and interesting in its price.

From this relationship for tourism we derive the same application of product - market matrix at the State level and competitive strategies at the regional level. It should be emphasized that these strategies must be in mutual compliance and, moreover, cannot function without each other.

The example of Slovakia, where several years ago a strategy for the State was established and was not tied to the regional level, and from the achieved results is the proof of the impossibility of a functioning of tourism as a system of selected measures. There's natural confirmation of the system theory of tourism and theory of strategic management. Successful strategy of the second level takes into account effects of external environment, combines different functional strategies and is based on a competitive strategy that responds to conditions inside the industry. The terms within the industry in tourism are evaluated not only within the country but also

as key competitive conditions in markets and source. To formulate a successful strategy for tourism at the state and regional level mainly means accepting the decision, which needs will be satisfied, which target customer groups will be satisfied and how (Kostková, Pellešová, Botlíková, 2015). From these decisions the sources of competitive advantage are created and the way how the state and its regions will compete with their products is determined.

Tourism policy refers to an overall, high-level plan that includes goals and procedures. Policies are generally found in formal statements such as laws and official documents and statements. Tourism policy is generally considered to be an area of a national overall economic policy (Andraz, Norte, Goncvaes, 2015). It is a public policy designed to achieve specific objectives relevant to tourism established at the municipal, state or federal level. Policy also evolves from the survey and analysis of present tourism development patterns and infrastructure, tourist attractions and activities, and the tourist market. More generally, tourism policy should reflect the overall development policy of the country or region so that tourism is well integrated with it. The above-mentioned definition raises questions about:

- Formulating tourism policy
- Objectives of tourism policy
- Objectives achieving

Although tourism is an activity sustained mainly by private initiative, governments have traditionally played an essential role in its development and in the promotion of their countries as a tourist destination through the activities of National Tourism Administrations (NTAs). Defining tourism policy as a public policy means that it is formulated by the public sector, which comprises central government and local authorities (general government), together with the nationalized industries or public corporations (Asmelash, Kumar, 2019).

Tourism affects many areas, the economic, socio-cultural and environmental. This is the principal reason for government's involvement in tourism development. Various economic reasons may induce the public sector to foster tourism:

- - Improved balance of payment situation.
- - Regional development.
- - Diversification of the economy.
- - Increased income levels and state revenues.
- - New employment opportunities.
- - Stimulation of non-tourism investment.

Social considerations are another important reason (Pedrana, 2013). Governments participate in tourism development in order to maximize the socio-cultural benefits of tourism (such as: cultural exchange, revival of traditional crafts and ceremonies, rural development, etc.) The state may also have a general responsibility to protect the social wellbeing of individuals by minimizing tourism as adverse socio-cultural effects (such as: deterioration of important historic and archeological sites, social degradation, overcrowding by tourists, loss of convenience for local residents, etc.) Another reason is the need for controlling the environmental impact of tourism, such as pollution and other environmental hazards and land use problems resulting from poor planning, setting and engineering of tourist attractions and facilities (Jenkins, 2011). Besides the above-mentioned reasons, government may encourage the development of tourism to further political objectives.

In order to achieve the policy objectives, NTAs are involved in many activities aiming to coordinate or encourage tourism development. Clearly, a significant number of countries around the world are still in an early stage of tourism development, particularly in developing countries and in countries where tourism is in a transition stage (Hall, 2008). But the European Union, North America and significant parts of East Asia and the Pacific countries have reached an advanced stage of tourism development. Thus, the degree of government involvement in the tourism sector differs from country to country, and so do the reasons of this involvement. Fulfilling the requirements of tourism policy, minimizing its negative impacts, and reaping the rewards, are the primary goals of tourism planning (Hall, 2008). Planning is particularly important for tourism development because of two characteristics of the tourism industry. First, tourism is a complex industry that stretches across many different sectors and businesses (therefore, it affects a wide-range of areas); second, tourism development usually requires both the public and private sectors to undertake major capital investment projects (hotel accommodations, public works infrastructure, transportation links). Because of these two characteristics, a lack of planning can result in mistakes that cannot be corrected (or are extremely costly to rectify), and which the host community will have to endure for many years. Legislation, stimulating regulations and terms under which activities related to tourism take place, is a state responsibility. Tourism legislation includes the basic tourism law. This law typically sets forth the policy for developing tourism and establishes the functions, structure and sources of funding of the national

tourism organizations (or regional tourism office). Various specific regulations are necessary for the protection and preservation of tourist facilities and the natural, historical, and cultural, resources of the country. Where national and regional authorities offer a policy of supporting the development of tourism as an income-contributing sector of the economy, this normally entails some form of government expenditure to help with the commercial provision of services (Butowski, 2010). This is especially important in tourism destinations that are in a development stage. Not only may government provide the funds required to the viability of marginal projects, but overt political support can be an element which psychologically reinforces decisions to invest (Pompurová 2011).

### 3. An application of the product – market matrix on the example of Austria and Slovakia as the basis of the tourism strategy

Slovakia is in the recent decades a bad example how it is possible to waste a potential for tourism development with direct influences on the economy and employment. It could choose from three basic marketing strategies (the growth, the conservation, and the fall-back), but, actually it has chosen none. This mistake was redoubled by not respecting the product-market matrix, since new markets were looked for and the old ones, stabilized, were let tumble. The markets of the surrounding central European countries benefited significantly from that situation, as they focused their efforts on obtaining the visitors from the Czech Republic, Poland, Hungary, and Austria. Austria made a hard effort from the beginning of the nineties of the 20th century to gain the visitors from the Czech Republic and Slovakia, and it ultimately succeeded. It reached record-high numbers of accommodated visitors from the Czech Republic and Slovakia from nearly a zero level after the year 1990.

By analysing the reached results in tourism, forecasting its future development, and by setting the fundamentals for the tourism development strategy to the future Slovakia has to draw only from well-tried strategic management models, the validity of which was verified by both the theory and the practice. Such a model is the product-market matrix, which enables us to decide if we will provide the existing products to the existing customers, the existing products to new customers, new products to the existing customers, or, by applying the diversification process, we offer new products to new customers. In reference to the previous sentence it is necessary to decide on implementing the strategy in the form of stabilisation, the growth, or a decline and at the tourism objects' level on the cost, differentiation, or the focus strategies. From the product-market matrix point of view as the first step it is necessary to compare the products. By comparing the product base and the visitor group base we decided to choose Austria because of two factors. These are the similarity of provided products and the similarity of visitor target groups between our countries. We chose the effects of the world economic crisis on the numbers of accommodated visitors and overnight stays as a significantly effecting factor, which had a radically different progress.

**Tab. 2: Comparison of tourism products in Austria and Slovakia from the product - market matrix point of view**

Tourism products in Austria	Tourism products in Slovakia
Activity holiday	Winter and summer mountain-air holidays
Ski holiday	- skiing
Recovery holiday	- recovery
Family holiday	- relax with family
Walking, hiking	- hiking
Sightseeing tours	Sightseeing tours
Spa holiday	Stay at the spa
Cultural holiday	Cultural events visit
Participation in various events	Participation in various events
Family/Acquaintance visit	Family/Acquaintance visit
Wellness and Beauty holiday	Wellness and Beauty holiday
City break	City break

Source: *Tourismus in Zahlen, Austrian Federal Economic Chamber, 2018, the own processing*

Both Austria and Slovakia offer in the tourism market similar products connected with the different primary and secondary offering conditioned by the geographic localisation. These are mainly the winter and summer mountain-air holidays, the spa stays, the cultural events visit, the family and acquaintance visits, the wellness holiday, and the city breaks. The tables 3, 4 include the data on the number of visitors and overnight stays in Austria and Slovakia. These data are interesting in the context of the crisis development, when Austria recorded only a slight decrease, or even an increase of the domestic tourism. Austria focused its effort in tourism on gradual implementation of the market entry strategies, the continuous product development strategies, and the market development strategies by using the product-market matrix. On the basis of the long-term market evaluation it



aimed at the supply of existing products, which were innovated progressively and developed for existing groups. It focused mainly on the domestic tourism maintenance.

Austria focused its effort in tourism on gradual implementation of the market entry strategies, the continuous product development strategies, and the market development strategies by using the product-market matrix. On the basis of the long-term market evaluation it aimed at the supply of existing products, which were innovated progressively and developed for existing groups. It focused mainly on the domestic tourism maintenance; the losses from the German market have been replaced by the accessions from the markets of the surrounding middle and East European countries. A gradual decline in the number of visitors and overnight stays from Germany is for Austria a long-term phenomenon. Therefore, since the beginning of the 90-ties of the 20th century, it has focused its effort on the surrounding markets, knowing that their purchasing power will grow.

**Tab. 3: Number of overnight stays from selected countries in Austria in the years 2005 to 2017. (in thousands of overnights and in %)**

Visitors/ year	2005	%	2008	%	2009	%	2010	%	2015	%	2017	%
Slovakia	232	<b>0.19</b>	389	<b>0.31</b>	424	<b>0.34</b>	465	<b>0.37</b>	701	<b>0.52</b>	738	<b>0.51</b>
Czech Republic	1 133	<b>0.95</b>	1 779	<b>1.40</b>	1 955	<b>1.57</b>	1 972	<b>1.58</b>	2 678	<b>1.98</b>	2 849	<b>1.97</b>
Poland	820	<b>0.69</b>	1 389	<b>1.10</b>	1 386	<b>1.11</b>	1 423	<b>1.14</b>	1 708	<b>1.26</b>	1 885	<b>1.30</b>
Hungary	1 296	<b>1.09</b>	1 642	<b>1.30</b>	1 499	<b>1.21</b>	1 510	<b>1.21</b>	1 665	<b>1.23</b>	1 871	<b>1.29</b>
Germany	51 028	<b>42.79</b>	50 144	<b>39.57</b>	48 857	<b>39.30</b>	48 155	<b>38.56</b>	50 199	<b>37.12</b>	53 576	<b>37.08</b>
Total of Foreign countries	87 741	<b>73.58</b>	92 840	<b>73.26</b>	89 864	<b>72.29</b>	89 857	<b>71.95</b>	98 824	<b>73.07</b>	105 977	<b>73.34</b>
Austria	31 501	<b>26.42</b>	33 879	<b>26.74</b>	34 443	<b>27.71</b>	35 023	<b>28.05</b>	36 425	<b>26.93</b>	38 523	<b>26.66</b>
Total of Overnight	119 242	<b>100.00</b>	126 719	<b>100.00</b>	124 307	<b>100.00</b>	124 880	<b>100.00</b>	135 249	<b>100.00</b>	144 500	<b>100.00</b>

The source: *Tourismus in Zahlen. 2018. Austrian Federal Economic Chamber, the own processing*

It succeeded by following the basic strategies with the growth strategy at the product-market matrix level, and the differentiation strategy at the regional level, without applying the diversification strategy which is costly. Austria based the differentiation at the regional level on the fact, that the state and its regions are the brand which is still well-purchasable, and on the supply of a differentiated product in individual regions. A sharp increase of the visitors and overnight stays number from Slovakia, the Czech Republic, Poland, and Hungary in the recent years is the direct evidence that its strategy has been successful. Including the visitors from Germany these markets accounted for 56% of the visitors' number and 54% of the number of overnight stays. By applying such a relatively simple strategy based on the usage of its good reputation and due to the proximity of potential source markets and the inaction of its competitors Austria has made significant achievements and it has not had to invest a large resources to costly strategies in distant markets.

**Tab. 4: Numbers of overnight stays from selected countries in Slovakia in the years 2005 to 2017. (in thousands of stays and in %)**

Visitors/ year	2005	%	2008	%	2009	%	2010	%	2015	%	2017	%
Czech Republic	1 375	<b>12.81</b>	1 705	<b>13.68</b>	1 301	<b>12.52</b>	1 350	<b>13.02</b>	1 402	<b>11.35</b>	1 768	<b>11.84</b>
Poland	608	<b>5.66</b>	942	<b>7.56</b>	480	<b>4.62</b>	453	4.37	430	<b>3.48</b>	512	<b>3.43</b>
Hungary	322	<b>3.00</b>	225	<b>1.81</b>	137	<b>1.32</b>	120	1.16	153	<b>1.24</b>	220	<b>1.47</b>
Germany	1 005	<b>9.36</b>	682	<b>5.47</b>	528	<b>5.08</b>	491	4.73	451	<b>3.65</b>	487	<b>3.26</b>
Austria	172	<b>1.60</b>	159	<b>1.28</b>	123	<b>1.18</b>	121	1.17	157	<b>1.27</b>	183	<b>1.23</b>
Total of Foreign countries	4 872	<b>46.39</b>	5 261	<b>42.21</b>	3 769	<b>36.27</b>	3 807	36.72	4 456	<b>36.08</b>	5 429	<b>36.35</b>
Slovakia	5 861	<b>54.61</b>	7 203	<b>57.79</b>	6 622	<b>63.73</b>	6 560	63.28	<b>7 894</b>	<b>63.92</b>	9 507	<b>63.65</b>
Total of Overnights	10 733	<b>100.00</b>	12 464	<b>100.00</b>	10 391	<b>100.00</b>	10 367	100.00	12 350	<b>100.00</b>	14 937	<b>100.00</b>

The source: *statistic data of The Ministry of Economy of the Slovak Republic*

Considering the period from 2005 to 2017 Slovakia is an opposite example. The success based on a booming growth till the year 2008 has disappeared due to the incoming crises and the decline in the visitor's and the overnight stays number from the key source markets amounts to dozens of percent. The next research will probably deal with the effects of the euro currency introduction on a slump of the visitors' and overnight stays number. The

question is why due to weakening the national currencies in 2009 Austria did not experience the similar decrease. One of the possible answers is that its growth was not based on the boom, but on the long-term strategy and that the introduction of the euro currency in Slovakia fully revealed an excessive price level in relation with the quality of provided services (Pompurová, 2009).

The year 2009 meant the return to the level from the year 2005, in case of Hungary the decline was much higher. It is striking that the German market had begun to crumble long before the introduction of the euro currency and in 2009 it reached 68% of the level in 2005 in terms of the visitors' number and 52% of the level in terms of the overnight stays number. There was a decline of 7% in the number of accommodated guests from Germany already in 1994. It was one of the first signals of a collapse of this important market.

## Conclusions

The mentioned data on the products and markets using the example of comparing the results of Austria and Slovakia in tourism, including the turbulent period of the crises that did not produce almost no changes in Austria, but a large decline in Slovakia, are the real evidence of the need to promote purposefully the tourism development strategy based on the well-trying theoretical models, the validity of which can be verified by comparing the products and the target markets in practice.

There follows a lesson for Slovakia that relying on the booming trend has revealed insufficient activities at the strategic level in terms of the marketing strategies of the first and second levels. Filling the product – market matrix also refers to the fact that from the point of view of the first level marketing strategy it is necessary to strengthen the existing products including their innovation in accordance with the European trends and to focus on the traditional markets, for which Slovakia cannot be a differentiator, this is what Austria has become, but it can successfully implement the specialisation strategy focusing on the product and target groups differentiation. Slovakia has a significant growth potential in the given markets, especially by considering the numbers of visitors and overnight stays from Germany in Austria. Moreover, both the countries have in common other target markets having relatively significant position in the number of visitors and overnight stays such as Russia, Ukraine, Italy, and the United Kingdom. It depends on Slovakia how it uses these market opportunities. It will not be possible without functioning and mutual consistency of strategies at the states, regions, and tourism objects levels.

Slovakia and Austria are offering similar products for similar target groups in the Central European tourism market. Austria has a competitive advantage in this competitive fight. Despite its gradual growth, Slovakia is losing its key target markets from neighboring countries. This is due to Austria's long-term consistent policy in the international tourism market. In Slovakia, there is a need to significantly increase the efforts of guests from neighboring countries. Otherwise, we will continue to lose market shares due to a weaker competitive position.

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