

NEW TOURISM CLUSTERS IN THE FIELD OF SPORTS AND HEALTH; THE CASE OF ALPINE WELLNESS

12th International Tourism and Leisure Symposium

Barcelona, April 2003

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ABSTRACT

The present crisis of the tourism industry (in terms of declining destinations) can be considered as a logical consequence of its created core destination strategies which have been established in the period of mass tourism (1960-1990), and which lacked both a conceptual and a customer focus. Big socio-demographic shifts, health awareness and changes in consumer behaviour and values have become important determinants and critical factors of success for what might be termed “new tourism”. The transformed tourist demand calls for new innovative products (Poon & Weiermair) such as e.g. “Alpine Wellness”, which is defined as the balance between the three spheres of Body, Spirit and Mind, which the alpine tourism industry is practising as a problem solution. New tourism clusters in the field of sports and health will in consequence constitute the only way to package and offer a complete and holistic range of wellness services.

Below an attempt is being made to illustrate the functioning and show the effects of clusters in general and give examples as to its applicability on the development of a new product Alpine Wellness. To initiate a cluster it is not sufficient that some suppliers cooperate and work together. Vertical and horizontal cooperations (alliances) along and within the tourism value chain are essential, because thick interactions and functional relationship between firms and industries characterize successful clusters. One of the aims of future research at the Center of Tourism and Service Economics is to show with some detail as to how clusters in general and the alpine wellness cluster in particular function and how this cluster can grow.

1. INTRODUCTION

Over the last years many tourist destinations have transformed, reengineered or rejuvenated themselves through the development, production and marketing of new tourism experiences and/or the reconfiguration of tourism product bundles. New technologies, more experienced customers, global economic reforms and environmental restrictions to growth have been only some of the challenges facing the industry. As a case in point alpine destinations have sought to continuously differentiate their products and have done so by emphasizing initially sports and relaxation followed by the focus on the family and now contain a wide array of differentiations reaching from business and seminar to cultural and health related tourism. Many of the past created core destination strategies and destination images were developed during the period of mass tourism (1960-1990) and lacked both conceptual

and customer focus (Weiermair 1998). As to alpine tourism developments during the last 50 years, mass tourism leads has resulted in an increasing absence of the classical summer tourist and a declining demand of winter tourism (Baumhackl 1995). The crisis of the tourism industry is a logical consequence of key-social, economic, political and technological influences after the Second World War. “Sun-lust” and inexperienced tourists, together with the availability of cheap package tours to sun destinations, charter flights and cheap oil ensured the demand for mass tourism. By the 1970s and early 1980s, mass tourism was a common benchmark for best practice in the industry. But the energy- and environment-intensive production patterns of mass tourism place an enormous stress on natural assets. Mass tourism destroys exactly what it is supposed to portray: such qualities as peace of mind, solace, genuine cultures and landscapes, unpolluted waters, intact reefs, mountains, ski slopes, wildlife and virgin forest (Poon 1993). Yet the aforementioned resources and resource uses are conditions for future customer driven tourism. Changes in consumer behaviour and values have given rise to the “new tourism”, which will be analyzed next.

2. THE NEW TOURIST - CHANGES OF VALUES AND ATTITUDES

Decision and behaviour patterns of the “old tourist” are greatly different from those of the new one. The new tourist has been described as more experienced, more flexible, more independent, more quality conscious and “harder to please”. Quality and value for money are the prime determinants of the market place. Today’s tourists are hybrid in nature and do not consume along linear and predictable lines. The new tourist wants to be different from the crowd and asks for individualized products (Poon 1993, Weiermair 2003). Individualization in this sense also implies optimising opportunities for the customers by choosing best fitting solution to their needs (Horx 2001). For suppliers in tourism this means that they will have to guarantee better quality, greater flexibility in attracting the tourists suggesting that more attention should be paid to psychographics than has been the case until now.

Demographic changes are similarly depict the new consumer. One of the most prominent and important driving force among the socio-demographic factors is the phenomenon of population aging associated with most western cultures (Foot 2002, Mühlhausen 2000). In the OECD-countries each third person will be over 60 years by 2020 (Horx 2001). According to trend research, the “aged tourist of the future” will constitute the wide majority in tourism and can be characterized as being in relatively better health with more travel experience and with relatively higher level of income, which

translates into increases in both the frequency and the intensity of travel (Horx 2000, Horx 1999, Godbey 2002).

All above mentioned factors suggest a need to reinterpretate and reposition many tourism sports products away from competitive sports aimed at pure sportive achievements as consumer benefits towards individualized “anti-aging” strategies and activities. It appears that sports in leisure and tourism have undergone a paradigm shift towards infotainment, experience orientation, health concern and questions of life balance (Mikunda 2002, Pine and Gilmore 2000). “Multi-optional tourists” ask for product bundles and complete service offerings (Weiermair 2001). Vacation is now an extension of life and new tourists go on vacation to experience something different, something to break away from every-day life or something to correct and readdress basic life questions.

Furthermore, a dominant motive for vacation has become health. In the year 2000 30,4 % of those Germans interviewed as tourists in the “Reiseanalyse 2000” said, that it is very important to do something for their health in their holiday (Lohmann and Aderhold 2000). Health is becoming one of the most important services and markets in the developed world (Bratl et al. 2001). It is predicted, that wellness-vacations in particular may become the most favoured holidays by the year 2003 (Kagelmann and Guthmann 2003). This should not surprise, for well developed products in tourism, as will be shown below, constitute the most appropriate problem solutions for the above described changes in consumer values, attitudes and preferences.

3. THE CASE OF ALPINE WELLNESS

In 1961 the American physician Dr. Halbert Dunn developed the term wellness as a composition of the words “wellbeing” and “fitness”. He called this state of the human body and mind in terms of a great personal contentment “high-level wellness” (Nahrstedt 2002). Authors like Ardell in 1977, Travis in 1984, Benson and Stuart in 1992 adopted the term “wellness” in connection with their health-related publications. Wellness tourism can be regarded as a subcategory of health tourism (Müller and Lanz 1998). Wellness can be defined as the balanced state of body, spirit and mind, including such holistic aspects and dimensions as self-responsibility, physical fitness/beauty care, healthy nutrition, relaxation, mental activity and environmental sensitivity as fundamental constitutional elements (Müller and Lanz-Kaufmann 2001). Wellness can also become a kind of “finding yourself” in an era of mega-stress. Wellbeing should therefore be understood as a holistic philosophy for life. The final goal should not only be the aiming for temporary feelings of happiness but also include long-term contentment (Schobersberger 2002).

The following graphic depicts the main elements of wellness:

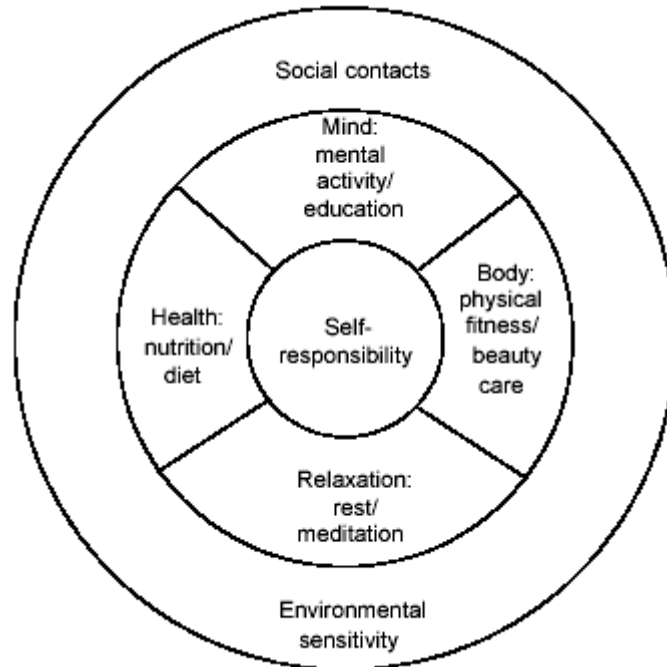


Figure 1: Elements of wellness (Müller and Lanz-Kaufmann 2001)

In 1948 the WHO (World Health Organization) defines health as a state of complete physical, mental and social well-being and not only the absence of disease. Classical medicine moved from a cure to a prevention orientation (Nefiodow 1996, Müller and Lanz 1998). People need self-responsibility to maintain their vitality (Nahrstedt 2002). In line with the above discussed changes in values and attitudes wellness vacations can be considered as the best possibility to satisfy the needs of the “new tourist”:

1. Wellness is the adequate method for health prevention and preservation in an aging society.
2. Wellness supports the trend of individualization, because wellness helps to discover one’s own personality and the ability to spend time with oneself and his/her appearance.

3. Wellness, in its holistic aspect, can offer a wide range of different services. Multi optional consumers can choose between relaxation, mental training, different kinds and intensities of sport offerings and beauty treatments.
4. Wellness tourism as can constitute an opportunity to combine fun, entertainment and adventure with health care and/or with the goal of building up strengths for everyday life.
5. Finally wellness may be considered as an opportunity to find a desired life balance between family, job and environment (Horx 2001).

The initiators of the wellness movements in Europe are the wellness hotels in Germany, Austria and Switzerland (Nahrstedt 2002). Particularly in Austria, there are now different initiatives on the way to develop and promote a new trademark “Alpine Wellness”:

For example a new destination development corporation “Wellbeing Destination Austria GmbH” has become responsible for the management of this cluster initiative. Five alpine provinces, Vorarlberg, Tyrol, Upper Austria, Salzburg and Carinthia have joined a platform or module to present their Alpine Wellness products as a group (Austrian National Tourist Office 2002). The Austrian Moderate Altitude Study (AMAS 2000) has examined the effects of vacationing in the mountains at moderate altitude levels. It was the first scientific field project of this nature which demonstrated beneficial effects during and after three weeks of holidaying and hiking in the mountains in patients showing the metabolic syndrome (hypertension, obesity, disturbances in fat and glucose metabolism) (Schobersberger 2000).

Alpine Wellness is not a revolutionary new product. But in contrast to wellness in lower altitude mountains nature and natural alpine resources can play a vital role. The product bundling of wellness services in mountainous regions is a good way to attract enthusiastic alpine tourists who prefer mountains instead of the sea. Austrian mountains are visited by over 10 million hikers and mountain climbers each year, the Alps by about 40 million. Worldwide, approximately 100 million people spend holidays in altitudes around 2000 metres (Schobersberger 2000, Berghold 2000). The Alps offer good conditions for the development of wellness projects: Nature, mountain air, clear and clean water and an interesting mountain panorama, good infrastructure for hiking, skiing, mountain biking or walking (Liebl 2003). Natural alpine resources similarly allow special wellness applications like e.g. hay bath, bio sauna or herb packs to mention only a few. One of the main results from the Austrian Moderate Altitude Study was the proof, that a stay in the alps can activate the metabolism, reduce body fat, enhance the quality of the red blood cells and improve the neuro-psychological values

(Schobersberger 2000). As such medical benefits can be documented Alpine Wellness can - beside health prevention – contribute demonstratively to an improvement of health among alpine tourists.

4. NEW TOURISM CLUSTERS IN THE FIELD OF SPORTS AND HEALTH

New tourism clusters in the field of sports and health will be the best method to supply and deliver in the holistic sense a whole range of wellness services. Some loose forms of alliances or cooperation already exist in winter sports, e.g. single ski cards for multiple regions (Güthler 2003). But the realization of Alpine Wellness requires a much broader vertical, horizontal and diagonal cooperation ranging from education, financing, research, design, product development, infrastructure and marketing to sales among and with different related branches of economic activity.

The development of tourism is essential for a region, because tourism can create jobs, stimulate investments in infrastructures, supplies governments with tax and fee revenues, and thus makes an important contribution to the domestic and international GDP (Whelan 1998). Marshall, one of the early economists to theorize on the cluster phenomenon, recognizes already in 1890 in his book: "When an industry has so chosen a locality for itself it is likely to stay there for long: so great are the advantages which people following the same skilled trade near neighbourhood to one another" (Marshall 1890). In this quote Marshall emphasised three observations, which capture attention in later publications:

- Industrial output is spatially concentrated
- Regional concentration typically encompasses related industries
- Once in place, agglomeration structures prove very persistent (Stuchtey 2000)

Since the early 1990s, particular with the publications by Michael Porter, there has been an increasing interest in industrial clusters and networks. But cluster research in the service sector, particularly in health tourism, is new and until now has remained a much less investigated field. In some way tourism clusters are subject to the same development principles as other industrial clusters. Thus, the existing work and results from industrial clusters can at least be partially used and applied to such tourism clusters as "Alpine Wellness".

4.1 CLUSTERS: SOME GENERAL OBSERVATIONS

Clustering has become a primary driving force for economic development in many locations. The OECD estimates 35 countries to have cluster development initiatives under way (Koziarski and Williams 2001). Firms in a given industry are often located in close proximity to each other and they often have dominated an industry for decades or even centuries. Clusters in general are an old phenomenon. Even though Silicon Valley and Hollywood may be the world's best known clusters (Enright 1990, Porter 1998a).

Today's economic map of the world is dominated by what Porter calls clusters: critical masses - in one place - of unusual competitive success in particular fields. Clusters are not unique, they are extremely typical - and therein lies the paradox: the enduring competitive advantages in a global economy lie increasingly in local settings (knowledge, relationships, motivations) which distant rivals cannot compensate (Porter 1998b). In a cluster, interconnected companies, specialized suppliers, service providers, firms in related industries and associated institutions (for example universities, standard agencies, and trade associations) both compete but also cooperate in different fields of activity. (Porter 1998a). The function of a cluster is to create a forum for a growth oriented dialogue between key regional stakeholders. All too often the initial cluster meetings are for many participants the first time that prospective cluster participants meet each other (Koziarski and Williams 2001). Cluster boundaries are defined by the linkages and complementarities across industries and institutions which are important in market competition. Many clusters fit within political boundaries, although they can reach beyond state or even national borders. A chemical cluster in Germany for example crosses over into the German-speaking part of Switzerland.

What is the key question in this context: E.g. How can clusters evolve and what are the benefits from cluster based strategies? The next section addresses this question.

4.2 ORIGINS AND EFFECTS OF CLUSTERS

Clusters typically do not develop as a group of firms which join to pursue a common purpose or goal. Clusters exist, they have their own development and dynamic which can be influenced by private and public activities, but it is very difficult to purposefully construct them (The Cluster Competitiveness Group 2002). Three main origins for the birth and evolution of clusters and three major effects of clusters can be observed as shown below (the first in small, the latter in capital letters):

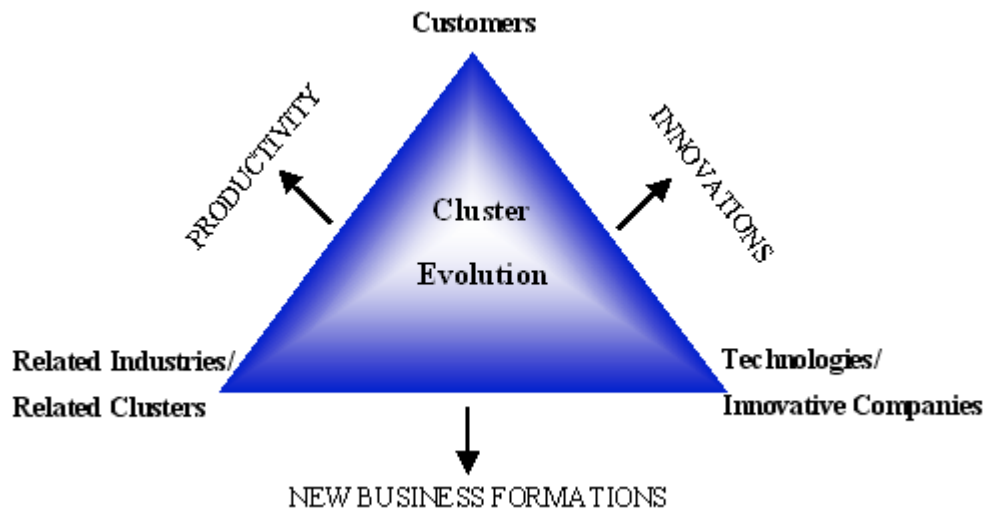


Figure 2: Seeds and effects of clusters (Porter 1998b)

In the following each of these six criteria will be discussed in general and applied to the development of Alpine Wellness products.

A local demand can be a source for a new cluster. Local **customers** know the region, the resources and sophisticated “lead users” (Herstatt et al. 2002) and can give good cues for desired products and services. The environmental cluster in Finland for example emerged as a result of pollution problems created by local process industries such as metals, forestry, chemicals and energy (Porter 1998b). Alpine tourists are a very good source for new wellness ideas and products, because tourism stakeholders know the region and existing resources and are familiar with their own patterns of local consumption. Additionally, a spatial agglomeration of firms or wellness offerings usually allow customers to pursue comparison shopping (Eberts and McMillen 1999) and to obtain the different elements of wellness services from diverse local suppliers.

Related industries or **related clusters** can be another driving force. The golf equipment cluster in San Diego for example has his roots in southern California’s aerospace cluster. Before this new cluster in San Diego was found, almost all golf players were using steel shafts, steel irons and wooden-headed-woods for playing. Accordingly golf equipment with these materials was heavy. The new materials pioneered in aerospace formed were the basis for a new generation of golf equipment. Now nearly all golf clubs are made out of graphite and the cluster in San Diego has created a pool of suppliers for

castings and advanced materials as well as engineers with experience in these technologies. For a tourism wellness cluster important related industries lie in the medical field and the sports and fitness industry. A functional food cluster nearby similarly can have a positive impact on how nutrition can be integrated as an element of wellness.

Last but not least new **technologies** or **innovative companies** can form the basis for a new cluster. The existence of one or two innovative companies can stimulate the growth of many others. New technologies can help with product or process innovations, which are created as a close cooperation with suppliers, universities, related industries or institutions. MCI and America online e.g. have been hubs for growing new businesses in the telecommunications cluster in the Washington D.C. urban area (Porter 1998b). New alpine technologies in Tyrol can be sources for a wellness cluster. The first destination in Austria to apply the results of the AMAS 2000 study and to offer the AMAS Welltain vacation is Lech/Zürs. The already existing close cooperation to the regional tourist industry, suppliers and universities offer a good framework for extending the network. When a cluster begins to form, a self-reinforcement cycle promotes his growth. Maybe in a few years a tourism health cluster will be established in the region around Lech/Zürs.

The effects of clusters can be summarized in terms of three flows. **Productivity** enhancements can be observed. Companies in a wellness cluster have better access to qualified employees and suppliers, who know the health and tourism branch and who are frequently located in their proximity. Economies of scale and scope can be achieved and transaction costs can be reduced when companies of the same industry work together (Keller 1998, Lanz-Kaufmann 1999). Market or special wellness information accumulate in a cluster and facilitate the information flow. Institutions or universities can be used mutually and capital expenditures in regional marketing, infrastructure or education programs can be employed and shared together. Alpine Wellness services are very staff demanding and the necessary infrastructure is likely to be capital intensive (Müller and Lanz 1998). Especially for small suppliers it is more effective to cooperate and not to offer everything alone in-house. Additionally, productivity savings can be realized by benchmarking. It is easier and more evident to compare one's own performance with cluster participants, who share common circumstances than to benchmark with foreign companies from abroad.

The second effect of clusters are increases in **innovations**. Alpine tourists are a good window of opportunity to the market. Sophisticated travellers are usually part of a tourism cluster and therefore they should be identified for empirical research. When ideas for innovations are generated, realization within a cluster is carried out more rapidly and often cheaper, because the necessary resources are closely situated nearby. The continuous observation of other wellness cluster participants allows to

learn from the “neighbourhood” and windows of opportunities for innovation become more visible. Competitive pressure, peer pressure and constant comparisons appear in a cluster and makes them centers of innovation for years.

Beside productivity and innovation, clusters can also contribute to **new business formation**. Barriers to entry for new suppliers in the health care or leisure industry are lower

within a cluster than in isolated locations. A concentrated customer base (e.g. the located wellness hotels and service providers) lowers the risks for new entrants. Employees who identify existing gaps can build new businesses. Moreover, local financial institutions and investors are familiar with the branch and know the cluster companies for years, so that investment decisions can be done with more background information and with less risk (Johann 2002, Porter 2002, Porter 1998b).

In the above section the origins and effects of clusters in general and wellness clusters in particular were shown. But the “inner life” of clusters still remains a black box. Hence let’s try to shed some light onto the typical inner structure and workings of an “Alpine Wellness cluster”.

4.3 TOURISM CLUSTER: ALPINE WELLNESS

Through cluster based collaboration the forementioned benefits can be increased, because the multiplier effects of more productivity, innovations and business formations in a cluster influences most other branches of economic activity in that region.

Although there are similarities with industrial products there are also some notable differences between industrial products and tourism products, which have consequences for tourism cluster strategies. A main difference is the fact, that tourists must come “to the production site”, the region where different goods and services are produced. The tourist will consume a set of individual products and services that add up to the composite outcome of a visit. Other intermediaries like travel agents, air carries, hotels and tour operators get involved in organizing or delivering the tourism experience. In contrast to industrial clusters, seasonality can therefore constitute a problem in a tourism cluster. However, the advantage of the product “Alpine Wellness” is, that it is a year-round tourism produced without seasonality breaks.

Research has shown that tourism development is a venue in which cooperation is often more important than competition (Inman et al. 1998). In Alpine Wellness this is particularly true, because alpine resources are limited and the holistic aspect of wellness requires that different skills and experience complement each other. Furthermore, the long and complex value chain in tourism makes cooperation

necessary (Lanz-Kaufmann 1999). A cluster based development should try to build the value chain within each cluster in the region. A cluster strategy places all public and private stakeholders in the position of being producers and suppliers to one another, and seeks for constructive ways to define and carry out mutually beneficial action. The value chain is central to the tourism cluster concept, as it demonstrates how tourism can generate benefits to the economy beyond the tourism sector through linked industries (Gollub et al. 2002). The following chart shows a general value chain for Alpine Wellness services:

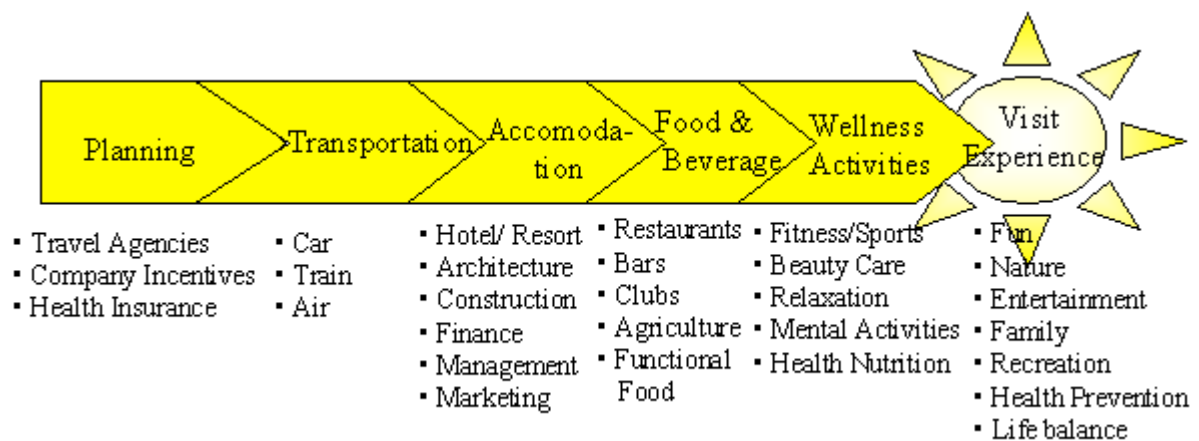


Figure 3: Alpine Wellness value chain

For travel planning, beside general travel agencies, few specialized travel agencies exist so far, e.g. FIT Reisen or IKD Reisen. Two different groups of wellness tourists can be distinguished: The first group is around 30 years and the second between 40 and 60 years, often in their “midlife crisis” (Steinbach 2000). Most of these tourists book their holidays themselves. But Alpine Wellness holidays can also be used for company incentive programs. Firms can demonstrate responsibility for the health of their staff. Through health prevention programs, the company ITT Automotive Europe could e.g. save about 1.25 million Euro by reducing illness levels among workers (Mühlhausen 2000). For health insurance companies, too, it would make sense to promote Alpine Wellness holidays. From a macroeconomics point of view it is much cheaper to prevent diseases than later pay for medical treatment and recovery.

Most of the Alpine Wellness tourists in Austria come by car from Germany, Switzerland and the Netherlands. Construction and building of wellness hotels is mostly on a large-scale and the architecture of the hotel should blend with the landscape of alpine regions. A close cooperation with local architects, civic engineers and finance institutes is therefore required. To get skilled staff for

management or marketing good contacts to management schools and universities must exist. Regional schools should offer tourism related education programs. In a full board type of accommodation tourists eat mostly in the hotel, but sometimes they wish to taste authentic and genuine regional food beyond the health food offered in the wellness hotels. All of the food related industries are co-producers of the tourism experience or tourism value chain. It is important to include all the relevant restaurant and bar suppliers, that form part of the value chain. For enjoying a complete wellness vacation nutrition should fit with the health program. To pursue health nutrition a close cooperation with bio-farmers and the regional food industry should be established.

Wellness activities constitute the core elements of an Alpine Wellness vacation. To supply wellness products and services, a capital intensive infrastructure must be developed and wellness coaches in hotels have to be familiar with the associated soft skills. Cooperation linkages with leisure, medical and sports industry are important for developing and producing the necessary wellness services. Other important related industries must also exist. A second Ph.D. thesis at the Center of Tourism and Service Economics deals with the development of new alpine wellness products. When such prospective wellness products are identified, a corresponding value chain can show in detail as to where cooperation is necessary.

Tourism products are very service intensive, which requires a very close and intensive collaboration between different service providers, as they together influence the holiday experience. In the Alpine Wellness value chain the visit experience lies in consuming the wellness services in combination with nature, fun, and entertainment. Similarly the aim of an Alpine Wellness holiday can be to spend time with one's family, to recreate, to do something for health prevention or to find the necessary life balance. When wellness is offered in a qualified and holistic sense many stakeholders are involved in creating the tourism products. Vertical and diagonal integration and/or collaboration along the value chain is essential for cluster building. It is, however, not enough, if only some suppliers work together. To initiate cluster networks vertical and horizontal cooperations have to be sought. It is the pattern of interaction and functional relationship between firms and industries which characterizes well functioning clusters.

Besides the value chain, cluster initiatives have to analyse factor conditions, the demand situation and firms' strategy, structure and rivalry. Chance and government influence can also affect the cluster building (Porter 1990, Fernau 1997).

Worldwide some wellness clusters have already been identified and initiatives for promoting those clusters were mounted: The region around Calgary (Penman 2000), New Zealand and Rotorua in Finland are but a few (Kozlarski and Williams 2001). In Southern Australia, cluster strategies have

already been recognized years ago. First observations from Australia for the period 1995-2000 indicate that the benefit cost ratio (new exports to financial grants) is 10:1 including fully costing voluntary time (Koziarski and Williams 2001). Although there are different natural, governmental and cultural conditions in Austria and Australia, the example illustrates that benefits far outweigh costs.

Porter's "Diamond Model" can be fruitfully employed as a framework for characterizing and identifying a cluster. This model is very established, as it includes all relevant market forces and factors of competitiveness.

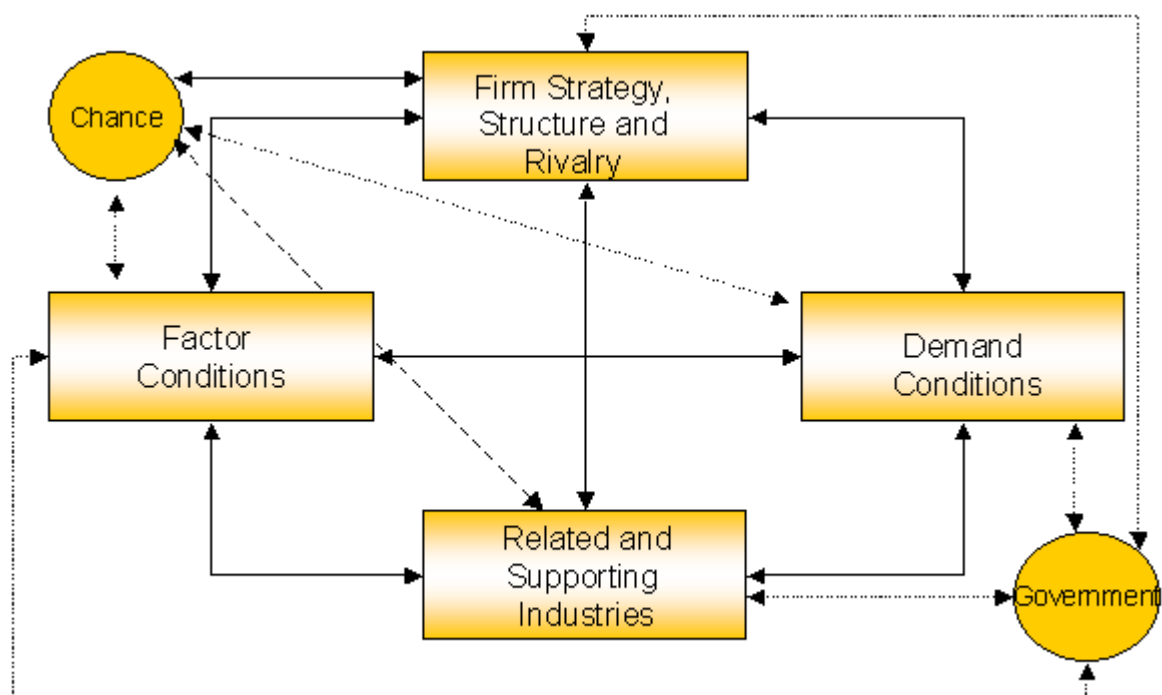


Figure 4: Porter's Diamant (Porter 1990)

Together with Theiner's more demand-side-oriented Ph.d. research on new Alpine Wellness products/services Steinhauser's Ph.d. work at the Center for Tourism and Service Economics focuses on the characteristics of Alpine Wellness clusters. As a starting point the above described Porter model will be used. Empirical research based on these hypotheses will later show what types of vertical and horizontal cooperation already exist now and which collaborative programs should be introduced in the future to optimise cluster effects. In the end the entire cluster "Alpine Wellness" with all of the required interactions and collaborations should emerge. As a starter, major factor conditions so far

include alpine resources, the Alps as a geographic location, health-related knowledge and wellness coaches. The related and supporting industries will come from leisure, sports, cosmetic and health care. The principal form of managing transactions within a wellness cluster must be long-term business relationships based on new strategic business plans (Enright 2000).

In summary, Alpine regions represent an ideal starting point for what may be called Alpine Wellness. At the moment the Alps are still far away from having well defined wellness clusters. First signs for collaborations between wellness suppliers however exist. Single ski cards for multiple regions or a common wellness infrastructure for several hotels (Müller and Lanz 1998) can only be considered starting points for a growing network. Intensive exchange and interaction processes between institutions, agencies, universities and customers are as important as the related supplier industries for a functioning and growing sports and health cluster. It is time to react and to start the cluster developing process, because it takes years until a network of critical size can be created, the core competencies of the partners are developed and trust can be formed (Johann 2002).

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