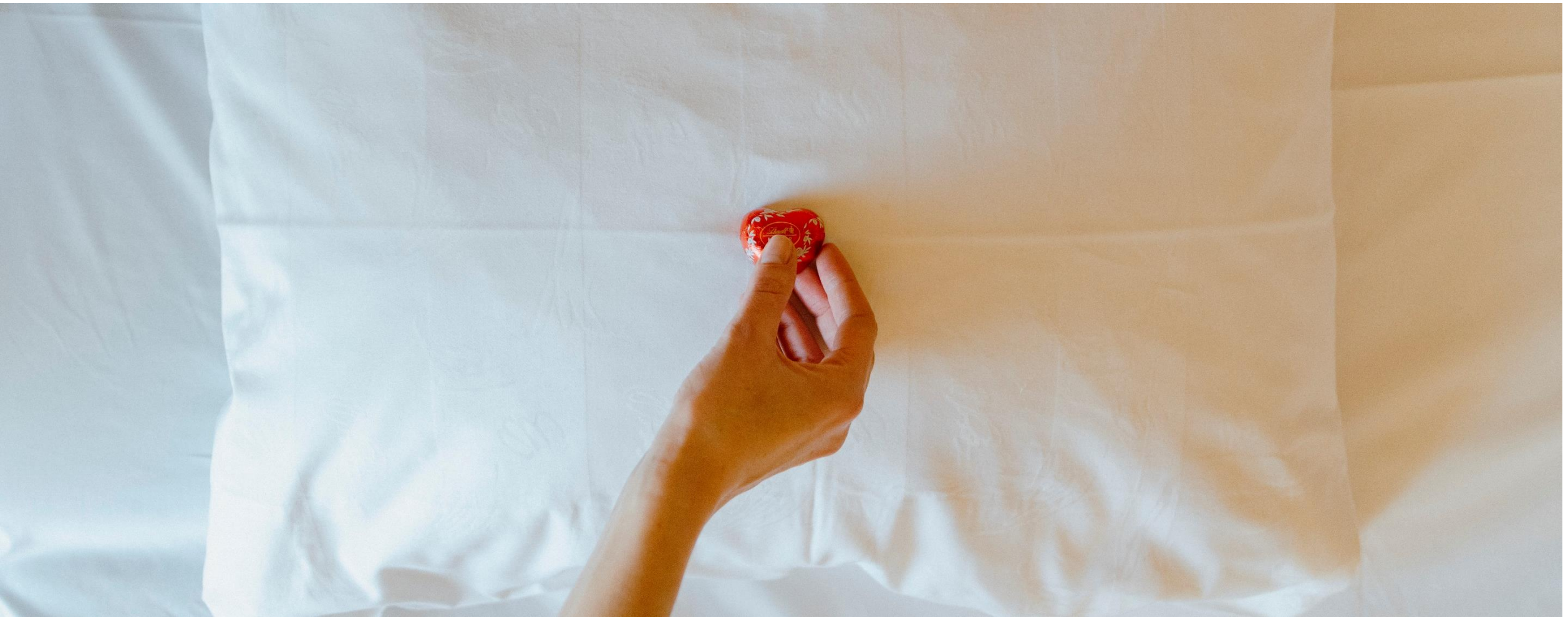


A person in a yellow kayak with a red paddle is paddling on a calm lake. The lake is surrounded by steep, forested mountains with patches of snow. The water is dark blue and reflects the surrounding landscape. The kayaker is in the center of the frame, moving away from the viewer.

Tourism in Tirol Facts and Figures 2019

Table of content

1. Arrivals and overnight stays in Tirol	3
2. Markets of origin	9
3. Tourism associations and municipalities	16
4. Accommodation	20
5. Alpine competitors at a glance	27
6. Economic importance of tourism in Tirol	31
7. Reasons for visiting Tirol	35



Arrivals and overnight stays in Tirol

Arrivals and overnight stays at a glance

Arrivals

- Winter 2018/19 6.2 million
- Summer 2019: 6.2 million
- Tourism year 2018/19: 12.4 million

	Arrivals		
	Winter 2018/19	Summer 2019	TY 2018/19
Tirol total	6.211.992	6.197.982	12.409.974

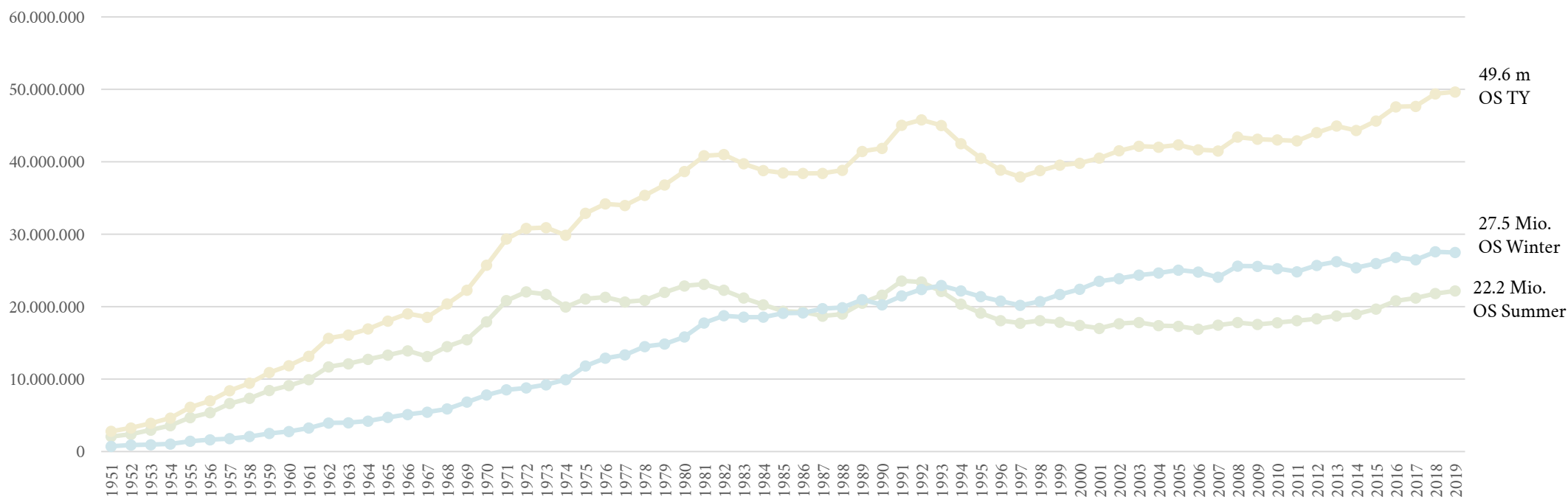
Overnight stays

- Winter 2018/19: 27.5 million
- Summer 2019: 22.2 million
- Tourism year 2018/19: 49.6 million

	Overnight stays		
	Winter 2018/19	Summer 2019	TY 2018/19
Tirol total	27.486.459	22.161.313	49.647.772

Development of overnight stays since 1951

- Slight decrease in Winter 2018/19 after the highest result in the previous year
- Summer with peak in the early 90s, since 2009 constant slight increase in overnight stays



Source : Office of the Tirol State Government, Regional Development – Statistics; OS = overnight stays, TY = tourism year

Development in the past 10 years

Tourism year:

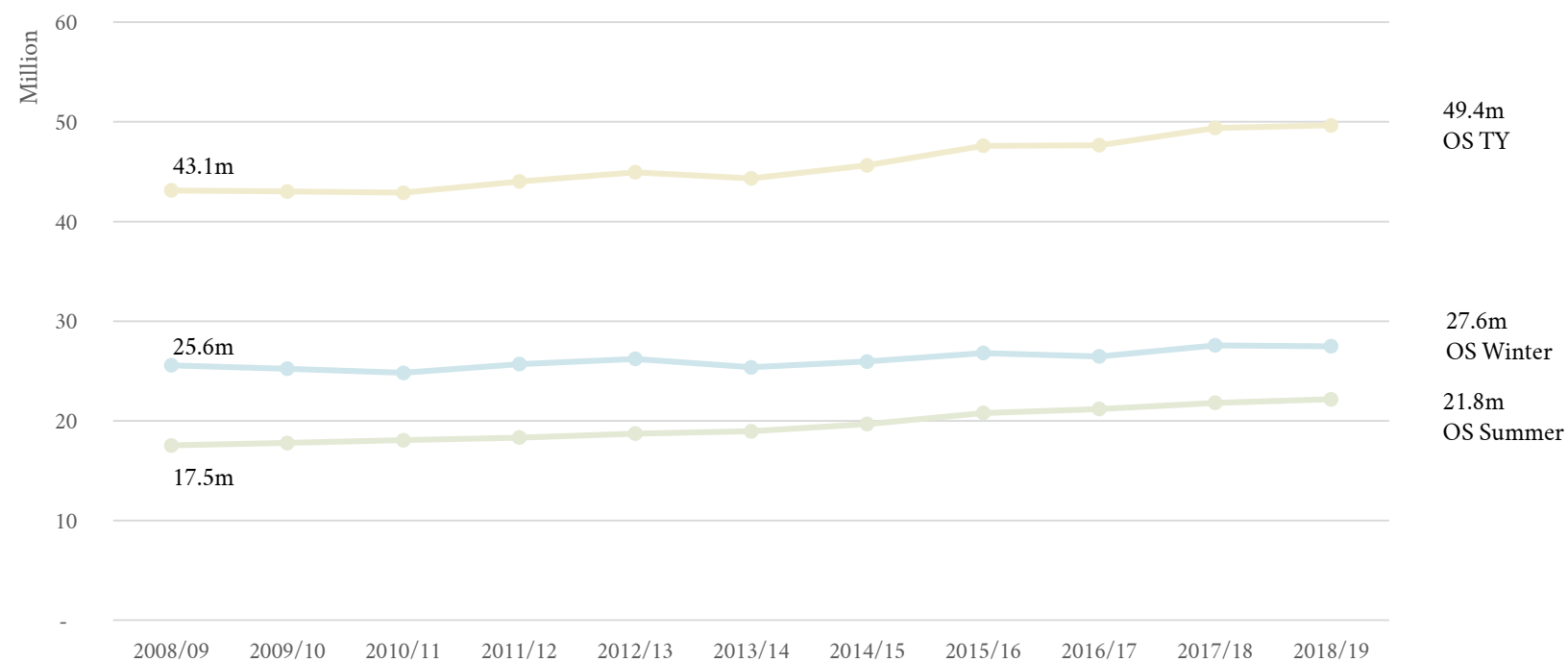
- Arrivals +35.0%
- Overnight stays +13.7%

Winter:

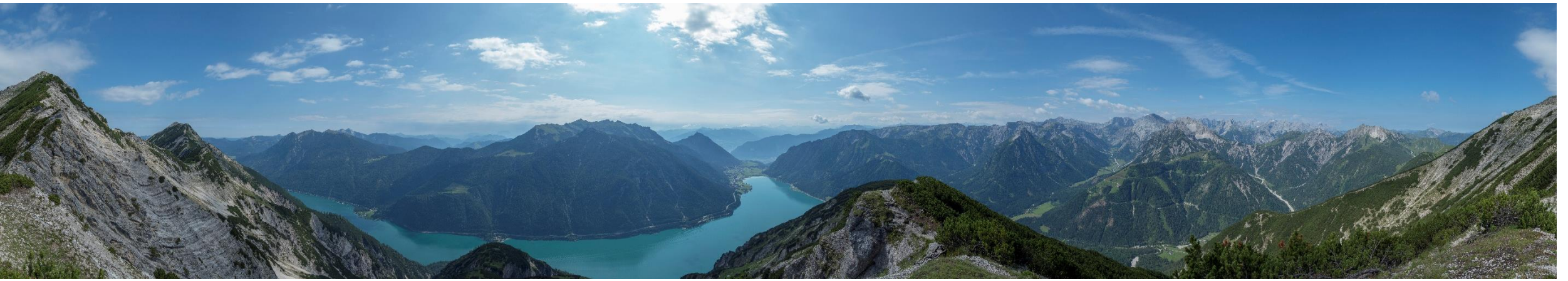
- Arrivals +24.0%
- Overnight stays +7.7%

Summer:

- Arrivals +48.1%
- Overnight stays +22.4%

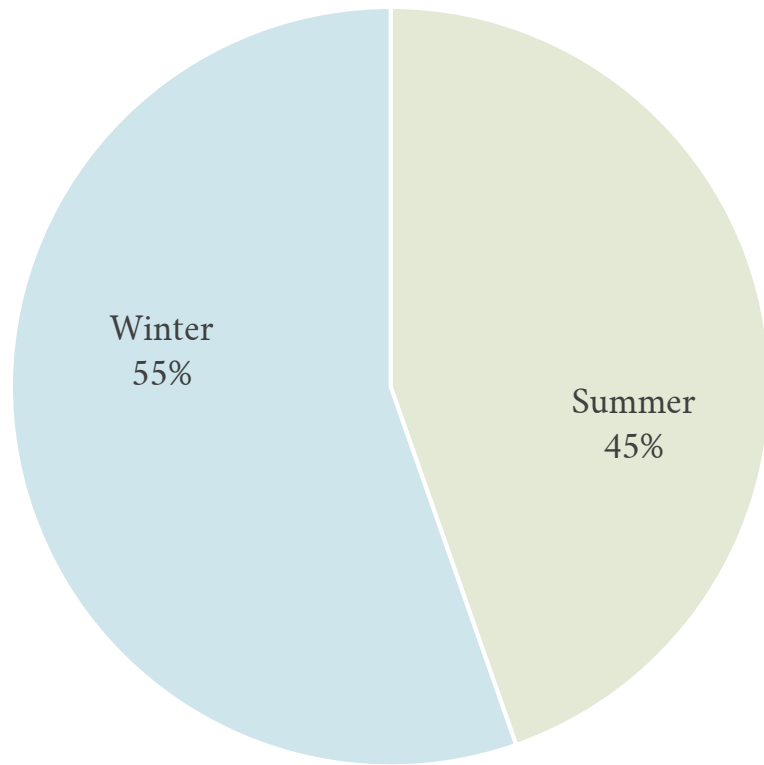


Source: Office of the Tirol State Government, Regional Development – Statistics; OS = overnight stays, TY = tourism year



Comparison of arrivals and overnight stays

- The average length of stay for guests in Tirol decreased in the last 10 tourism years from 4.7 to 4.0 days
- Trend towards shorter holidays, but more of them
- Guests stay longer in Tirol in winter than in summer:
 - Winter 2018/19: 4.4 days
 - Summer 2019: 3.6 days



- **Tourism year 2018/19:**
Winter season clearly stronger with 55% of overnight stays compared to the summer season with 45%
- **Tourism year 2008/09:**
Share of the winter season was slightly higher (59%)

Distribution over the seasons

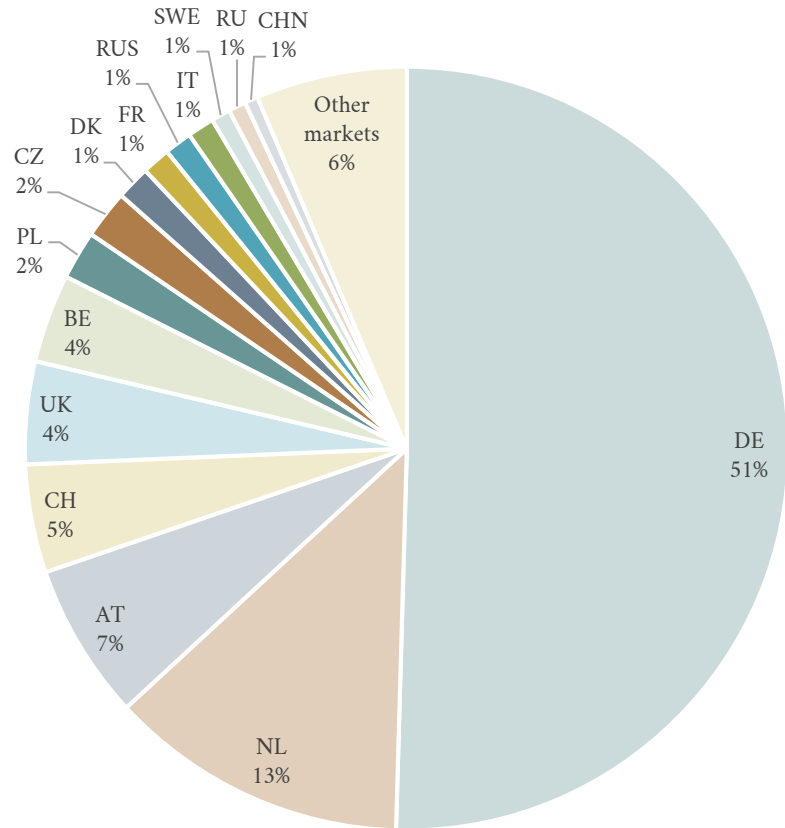


Markets of origin

Source markets in winter 2018/19

- Germany is by far the no. 1 source market in winter in Tirol
- The Netherlands in the second place ahead of Austria
- Growth for most of the top 15 markets over the past 10 years – decline in overnight stays from the UK, Denmark, France, Russia and Italy
- Highest growth rates compared by the last 10 years for Switzerland, the Czech Republic, as well as for Sweden and China (but starting from a very low level)

Rank	Markets of origin	Winter 2018/19		
		Overnight stays	Market share	% 08/09-18/19
1	Germany	13.867.284	50.5%	5.0%
2	Netherlands	3.485.506	12.7%	0.0%
3	Austria	1.820.680	6.6%	4.6%
4	Switzerland and Liechtenstein	1.259.743	4.6%	48.8%
5	UK	1.193.460	4.3%	-1.3%
6	Belgium	1.032.427	3.8%	15.7%
7	Poland	565.324	2.1%	6.5%
8	Czech Republic	563.058	2.0%	27.4%
9	Denmark	397.625	1.4%	-16.0%
10	France (incl. Monaco)	329.955	1.2%	-4.9%
11	Russia	319.577	1.2%	-20.2%
12	Italy	313.885	1.1%	-3.7%
13	Sweden	222.212	0.8%	27.3%
14	Romania	202.985	0.7%	0.1%
15	China	153.482	0.6%	718.1%
	Other markets	1.759.256	6.4%	36.4%
	Tirol total	27.486.459	100.0%	7.5%



- Germany with a market share of 51% of all overnight stays
- The top 3 markets Germany, the Netherlands and Austria with 70% of all overnight stays
- Slight decrease in the German market share in the last 10 years – in winter 2008/09 Germany had a market share of nearly 52%
- Increasing market share of overnight stays from Switzerland (+1.3 percentage points/pp), as well as slight increases from Belgium and the Czech Republic (+0.3 pp each) and China (+0.5 pp) in the last 10 years

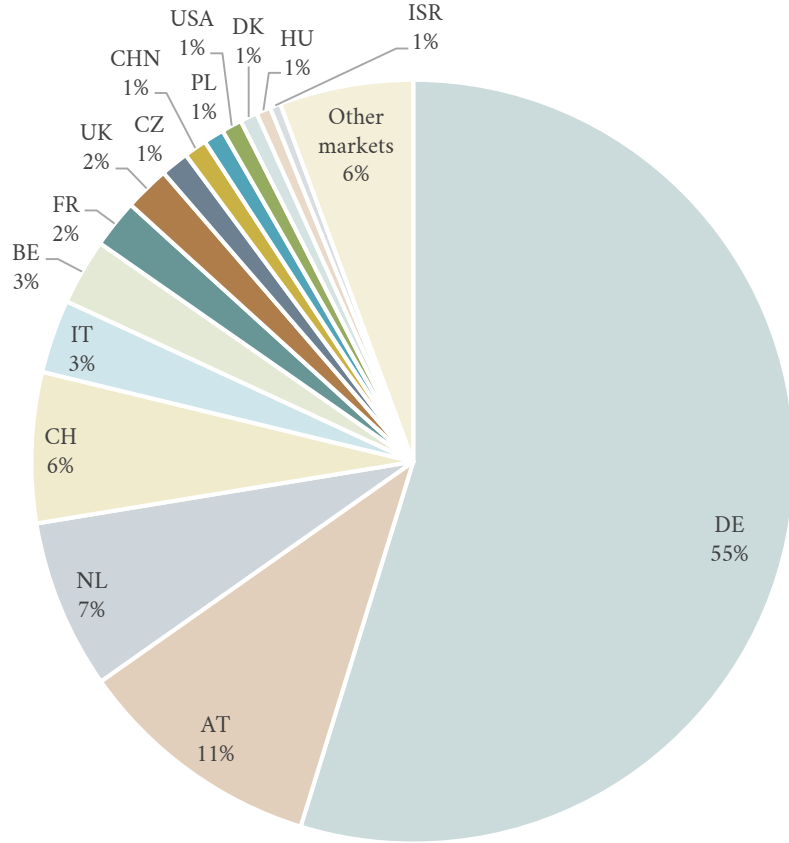
Source markets in winter 2018/19

Source markets in summer 2019

- Germany also no. 1 concerning overnight stays in summer
- Austria in the second place ahead of the Netherlands
- Decline in overnight stays in the last 10 years for Italy, Belgium, France and the UK
- Other main markets are increasing (especially Germany, Austria and Switzerland)
- Clear increases in overnight stays also from the Czech Republic, China, Poland, Hungary and Israel (but starting from a low level)

Rank	Markets of origin	Summer 2019		
		Overnight stays	Market share	% 2009-19
1	Germany	12.136.714	54.8%	32.0%
2	Austria	2.321.996	10.5%	20.3%
3	Netherlands	1.589.295	7.2%	8.3%
4	Switzerland and Liechtenstein	1.411.385	6.4%	20.0%
5	Italy	689.824	3.1%	-7.7%
6	Belgium	619.657	2.8%	-1.2%
7	France (incl. Monaco)	454.514	2.1%	-24.1%
8	UK	423.553	1.9%	-9.5%
9	Czech Republic	263.641	1.2%	105.3%
10	China	214.873	1.0%	637.2%
11	Poland	191.913	0.9%	242.3%
12	USA	190.666	0.9%	57.5%
13	Denmark	163.308	0.7%	5.7%
14	Hungary	135.232	0.6%	94.4%
15	Israel	100.856	0.5%	123.7%
	Other markets	1.253.886	5.7%	72.9%
	Tirol total	22.161.313	100%	26.3%

Source: Office of the Tirol State Government, Regional Development - Statistics



- In summer Germany has a market share of about 55%
- The top 3 markets are Germany, Austria and the Netherlands with more than 70% of all overnight stays
- The market share of Germany in summer increased in the last 10 years – in summer 2009 Germany had a market share of 52%
- Decreasing market share especially for the Netherlands (-1.2 percentage points/pp) as well as for Italy (-1.1pp) and France (-1.4 pp)
- Biggest increase of market share for Germany (+2.2 pp)

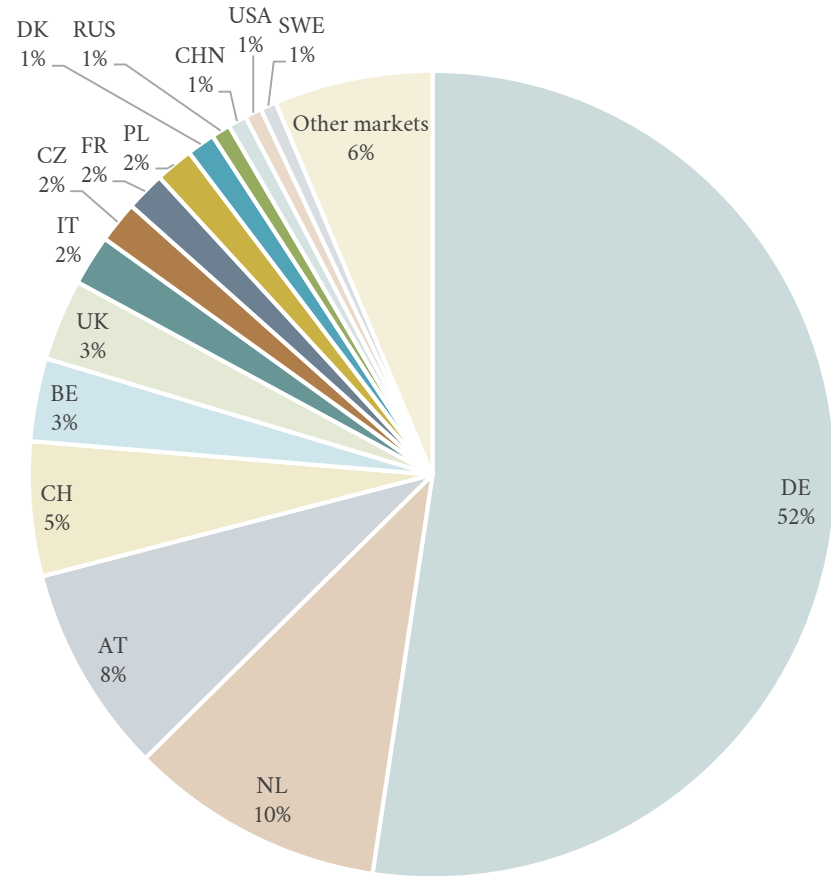
Source markets in summer 2019

Source markets in TY 2018/19

- Germany is no. 1 source market with more than half of all overnight stays in Tirol
- The Netherlands in second place ahead of Austria
- Switzerland is no. 4 with very positive results in the past 10 years
- Decline of overnight stays in the past 10 years for UK, Italy, France, Denmark and Russia
- Significant increase in overnight stays from the Czech Republic and Poland
- Very high growth rates in the source market China (but starting from a very low level)

Rank	Markets of origin	Tourism year 2018/19		
		Overnight stays	Market share	% 08/09-18/19
1	Germany	26.003.998	52.4%	16.1%
2	Netherlands	5.074.801	10.2%	2.5%
3	Austria	4.142.676	8.3%	12.9%
4	Switzerland and Liechtenstein	2.671.128	5.4%	32.1%
5	Belgium	1.652.084	3.3%	8.8%
6	UK	1.617.013	3.3%	-3.6%
7	Italy	1.003.709	2.0%	-6.5%
8	Czech Republic	826.699	1.7%	45.0%
9	France (incl. Monaco)	784.469	1.6%	-17.1%
10	Poland	757.237	1.5%	29.0%
11	Denmark	560.933	1.1%	-10.6%
12	Russia	376.122	0.8%	-13.1%
13	China	368.355	0.7%	668.9%
14	USA	339.369	0.7%	78.4%
15	Sweden	315.321	0.6%	32.2%
	Other markets	3.153.858	6.4%	45.6%
	Tirol total	49.647.772	100.0%	15.1%

Source: Office of the Tirol State Government, Regional Development - Statistics



- Germany with a market share of 52% in the tourism year
- The top 3 markets are Germany, the Netherlands and Austria with a market share of about 70%
- Decline for the Netherlands in the last 10 years – the market share in 2007/08 was about 12%
- Increase in overnight stays especially from Switzerland (+0.7 percentage points/ pp); decreases except from the Netherlands also from the UK and France (-0.6 pp each) as well as from Italy (-0.5 pp)

Source markets in TY 2018/19



Tourism associations and municipalities

Top 15 tourism associations by overnight stays

- Ötztal Tourismus clearly on top (winter rank 1, summer rank 2)
- Innsbruck Tourismus in 2nd place (winter rank 4, summer rank 1) ahead of Paznaun-Ischgl (winter rank 2, summer only rank 22)
- Also among the top 10 in summer and winter: Serfaus-Fiss-Ladis, Erste Ferienregion im Zillertal, Mayrhofen-Hippach, Wilder Kaiser and Olympiaregion Seefeld

Tourism association	TY 18/19	Rank	Winter18/19	Rank	Summer 19	Rank
Ötztal Tourismus	4.151.726	1	2.903.563	1	1.248.163	2
Innsbruck Tourismus	3.452.238	2	1.595.147	4	1.857.091	1
Paznaun-Ischgl	2.791.615	3	2.320.054	2	471.561	22
Serfaus-Fiss-Ladis	2.601.674	4	1.614.279	3	987.395	8
Erste Ferienregion im Zillertal	2.552.893	5	1.419.619	5	1.133.274	4
Mayrhofen - Hippach	2.354.748	6	1.390.506	6	964.242	9
Wilder Kaiser	2.119.477	7	1.048.785	9	1.070.692	6
Osttirol	2.109.540	8	898.688	12	1.210.852	3
Olympiaregion Seefeld	2.078.292	9	991.719	10	1.086.573	5
Stubai Tirol	1.848.649	10	1.085.780	8	762.869	11
Kitzbüheler Alpen - Brixental	1.697.614	11	988.181	11	709.433	13
Achensee	1.643.597	12	617.976	18	1.025.621	7
Tiroler Zugspitz Arena	1.641.449	13	835.820	16	805.629	10
Tiroler Oberland	1.572.419	14	851.254	15	721.165	12
St. Anton am Arlberg	1.551.015	15	1.247.025	7	303.990	29

Source: Office of the Tirol State Government, Regional Development - Statistics

Top 15 tourism associations by occupancy in %

- As in the last year Tux-Finkenberg has the highest occupancy in winter (61.6%) ahead of Serfaus-Fiss-Ladis with 58.9%; Ötztal Tourismus (57.1%) in 3rd place ahead of Paznaun-Ischgl with 56.6%
- In summer Achensee (62.9%) ahead of Kaiserwinkl (56.0%) and Tannheimer Tal (52.0%)
- In winter 5 regions and in summer 4 regions have an occupancy over 50%; in Tirol overall occupancy in winter is 44.4% - significantly higher than in summer (34.0%)

Rank	Tourism association	Winter 2018/19
1	Tux-Finkenberg	61.6
2	Serfaus-Fiss-Ladis	58.9
3	Ötztal Tourismus	57.1
4	Paznaun-Ischgl	56.6
5	Stubai Tirol	54.6
6	Mayrhofen - Hippach	49.6
7	St. Anton am Arlberg	49.0
8	Tiroler Oberland	49.0
9	Zillertal Arena	48.8
10	Innsbruck Tourismus	46.1
11	Wilder Kaiser	44.0
12	Pitztal	43.9
13	Achensee	43.8
14	Erste Ferienregion im Zillertal	42.5
15	Tiroler Zugspitz Arena	42.3

Rank	Tourism association	Summer 2019
1	Achensee	62.9
2	Kaiserwinkl	56.0
3	Tannheimer Tal	52.0
4	Innsbruck Tourismus	50.1
5	Naturparkregion Reutte	48.4
6	Imst Tourismus	46.3
7	Wilder Kaiser	43.9
8	Olympiaregion Seefeld	41.5
9	Kufsteinerland	41.4
10	Tiroler Zugspitz Arena	40.6
11	Silberregion Karwendel	39.5
12	Tirol West	39.3
13	Kitzbüheler Alpen - St. Johann ...	37.9
14	Tiroler Oberland	37.5
15	Serfaus-Fiss-Ladis	37.0

Source: Office of the Tirol State Government, Regional Development – Statistics; the occupancy rate is calculated for the entire season, i.e. possible days when the companies are closed cannot be taken into account in the Tyrol-wide calculation.

Top 15 municipalities with most overnight stays

- Sölden clearly on top of the ranking (winter rank 1, summer rank 6)
- Innsbruck in second place (winter rank 6, summer rank 1) ahead of Ischgl (winter rank 2, summer only rank 46) and Mayrhofen (winter rank 4, summer rank 3); also among top 10 in winter and summer: Neustift/Stubaital, Serfaus and Seefeld

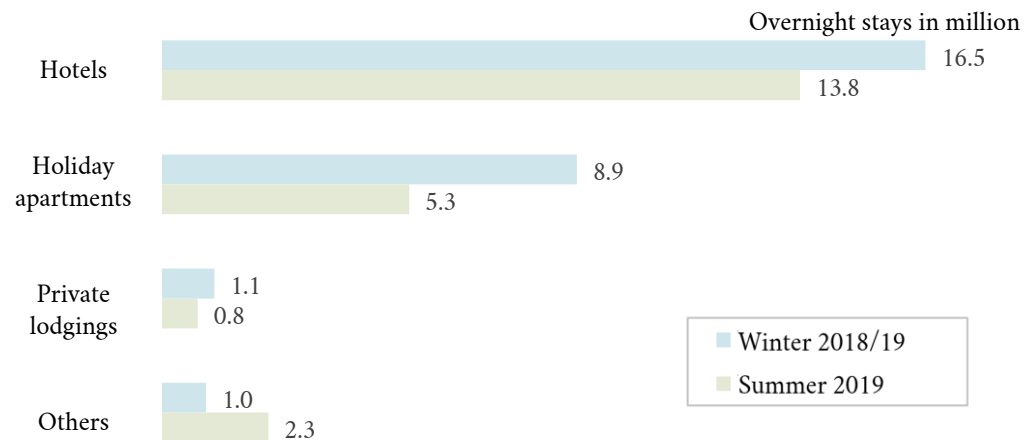
Municipality	TY 18/19	Rank	Winter 18/19	Rank	Summer 19	Rank
Sölden	2.576.848	1	2.067.037	1	509.811	6
Innsbruck	1.781.320	2	781.571	6	999.749	1
Ischgl	1.549.690	3	1.409.478	2	140.212	46
Mayrhofen	1.496.620	4	868.530	4	628.090	3
Neustift/Stubaital	1.323.984	5	790.384	5	533.600	5
Serfaus	1.261.546	6	779.225	7	482.321	7
St.Anton/Arlberg	1.219.909	7	1.023.736	3	196.173	33
Seefeld/Tirol	1.098.837	8	526.457	10	572.380	4
Eben/Achensee	1.098.140	9	399.160	18	698.980	2
Tux	995.221	10	660.672	8	334.549	14
Fiss	985.285	11	620.668	9	364.617	12
Kirchberg/Tirol	872.949	12	471.791	11	401.158	9
Ellmau	859.253	13	407.818	16	451.435	8
Kitzbühel	828.463	14	455.354	12	373.109	11
Wildschönau	777.767	15	403.512	17	374.255	10



Tirol accommodation

Overnight stays in accommodation categories 2018/19

- About 2/3 of all overnight stays in Tirol are in hotels
- Strong decline for private lodgings in summer and winter (but also sharp decline in the number of beds in the private lodgings segment and hardly any active marketing by the landlords)
- Highest increase in overnight stays in holiday apartments in the last 10 years in winter and summer



Accommodation categories	Winter 2018/19	% 08/09-18/19
Hotels	16.457.671	3.9%
Holiday apartments	8.946.878	25.9%
Private lodgings	1.130.329	-36.3%
Others	951.581	9.6%
Total	27.486.459	7.5%

Accommodation categories	Summer 2019	% 09-19
Hotels	13.755.056	17.1%
Holiday apartments	5.330.220	66.9%
Private lodgings	777.706	-24.1%
Others	2.298.331	46.0%
Total	22.161.313	26.3%

Source: Office of the Tirol State Government, Regional Development - Statistics

Number of beds

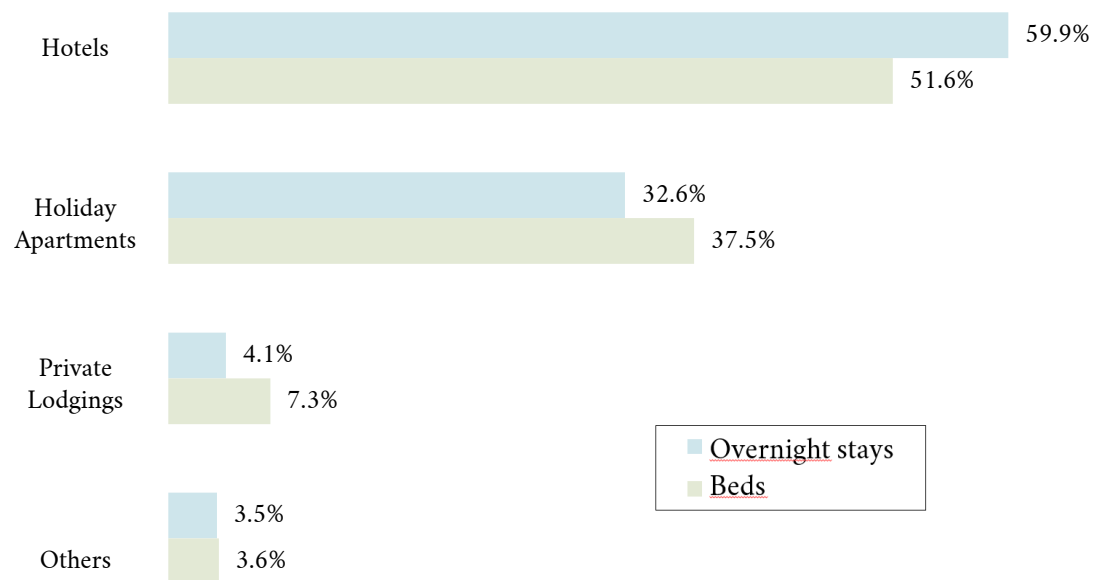
- In Tirol there are about 330.000 beds in winter and summer
- Every second bed in Tirol is a hotel bed; one third is in holiday apartments and about 7% in private lodgings
- Sharp decline in the number of beds offered by private lodgings in the last 10 years
- Number of beds in 2/1-star hotels and 3-star hotels also decreased; 4/5-star hotels with increasing number of beds
- The number of beds in holiday apartments also increased sharply within the last 10 years

Accommodation categories	Number of beds winter		
	2008/09	2018/19	% 08/09-18/19
Hotels	177.091	174.268	-1.6%
Holiday apartments	109.897	126.456	15.1%
Private lodgings	42.563	24.552	-42.3%
Others*	11.944	12.140	1.6%
Total	341.495	337.416	-1.2%

Accommodation categories	Number of beds summer		
	2009	2019	% 09-19
Hotels	174.082	167.212	-3.9%
Holiday apartments	106.832	122.218	14.4%
Private lodgings	42.039	24.113	-42.6%
Others*	16.379	17.663	7.8%
Total	339.332	331.206	-2.4%

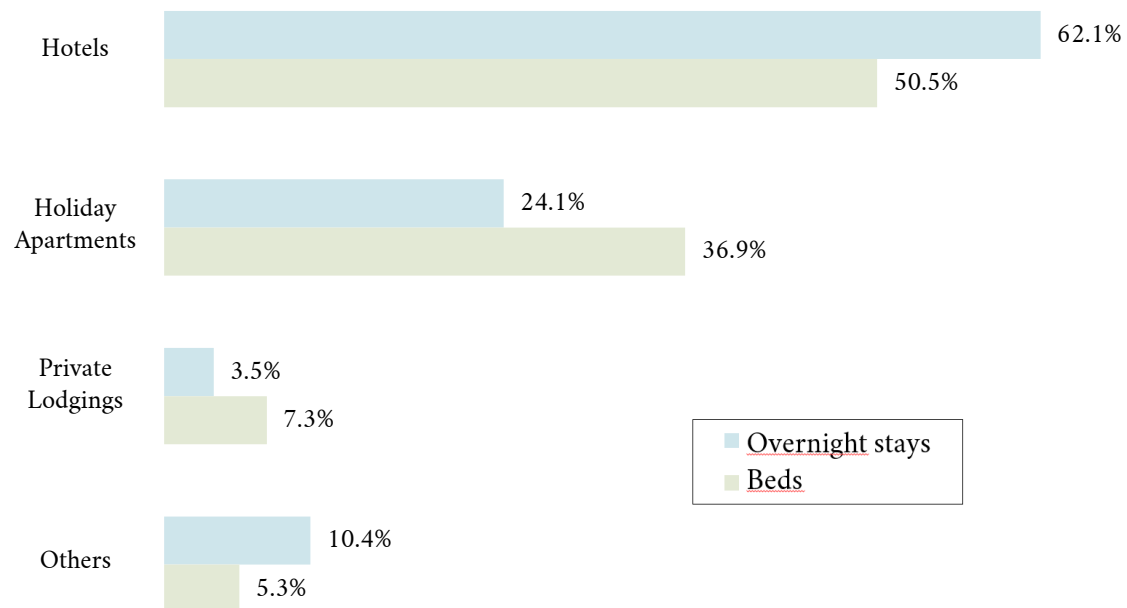
Ratio of overnight stays to beds in winter

- Every second bed is a hotel bed
- These generate about 60% of all overnight stays in Tirol
- Private lodgings and holiday apartments are frequented clearly below average



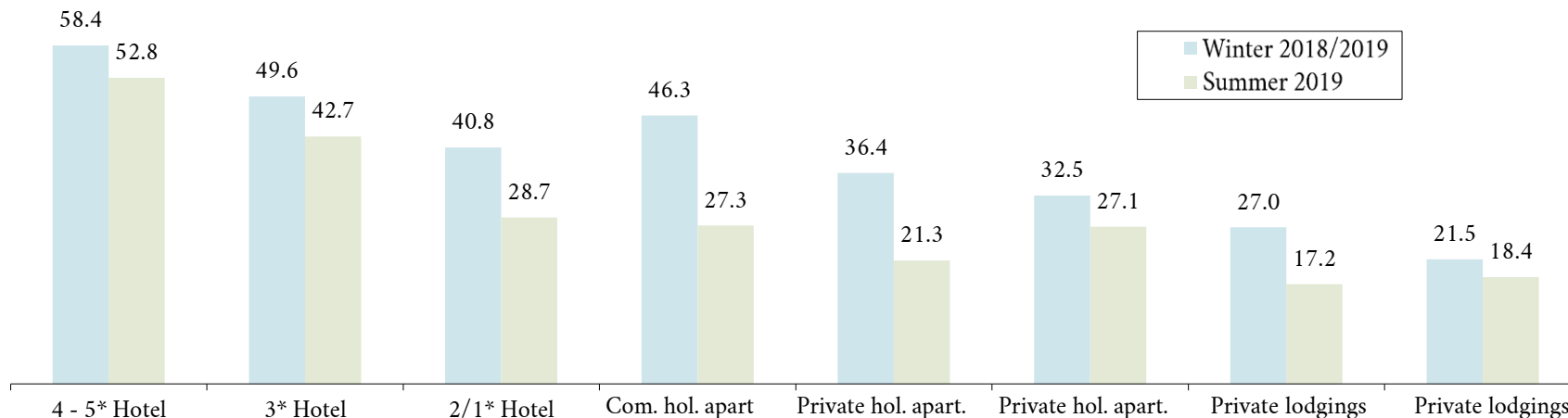
Ratio of overnight stays to beds in summer

- Every second bed is a hotel bed
- These generate about two-thirds of all overnight stays in Tirol
- Private lodgings and holiday apartments are frequented clearly below average



Occupancy in %

- Highest occupancy in upscale hotels in winter and summer
- Establishments generally better occupied in winter than in summer; greatest difference between summer and winter season for holiday apartments
- Total occupancy in Tirol: winter 44.4%, summer 34.0% (with a slight decline in winter and slight increase in summer compared to the previous year)

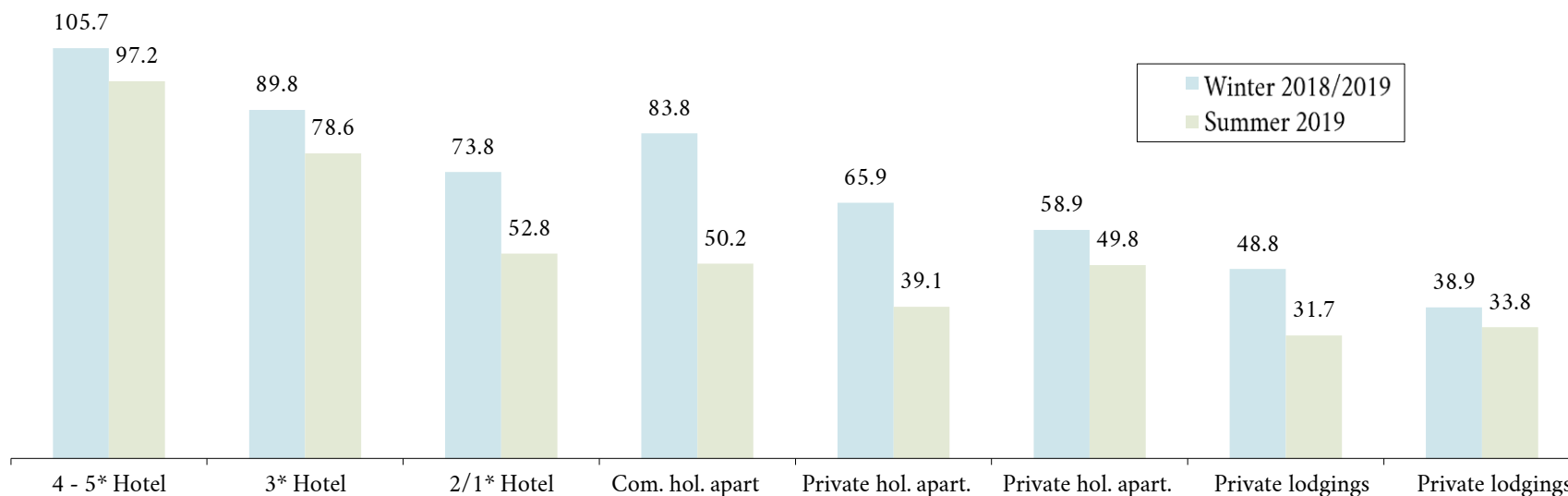


Source: Office of the Tirol State Government, Regional Development – Statistics; the occupancy rate is calculated for the entire season, i.e. possible days when the companies are closed cannot be taken into account in the Tirol-wide calculation.

Occupancy in days

Occupancy Tirol in total:

- Winter: 80 days of full occupation (winter season: 181 days)
- Summer: 63 days of full occupation (summer season: 184 days)



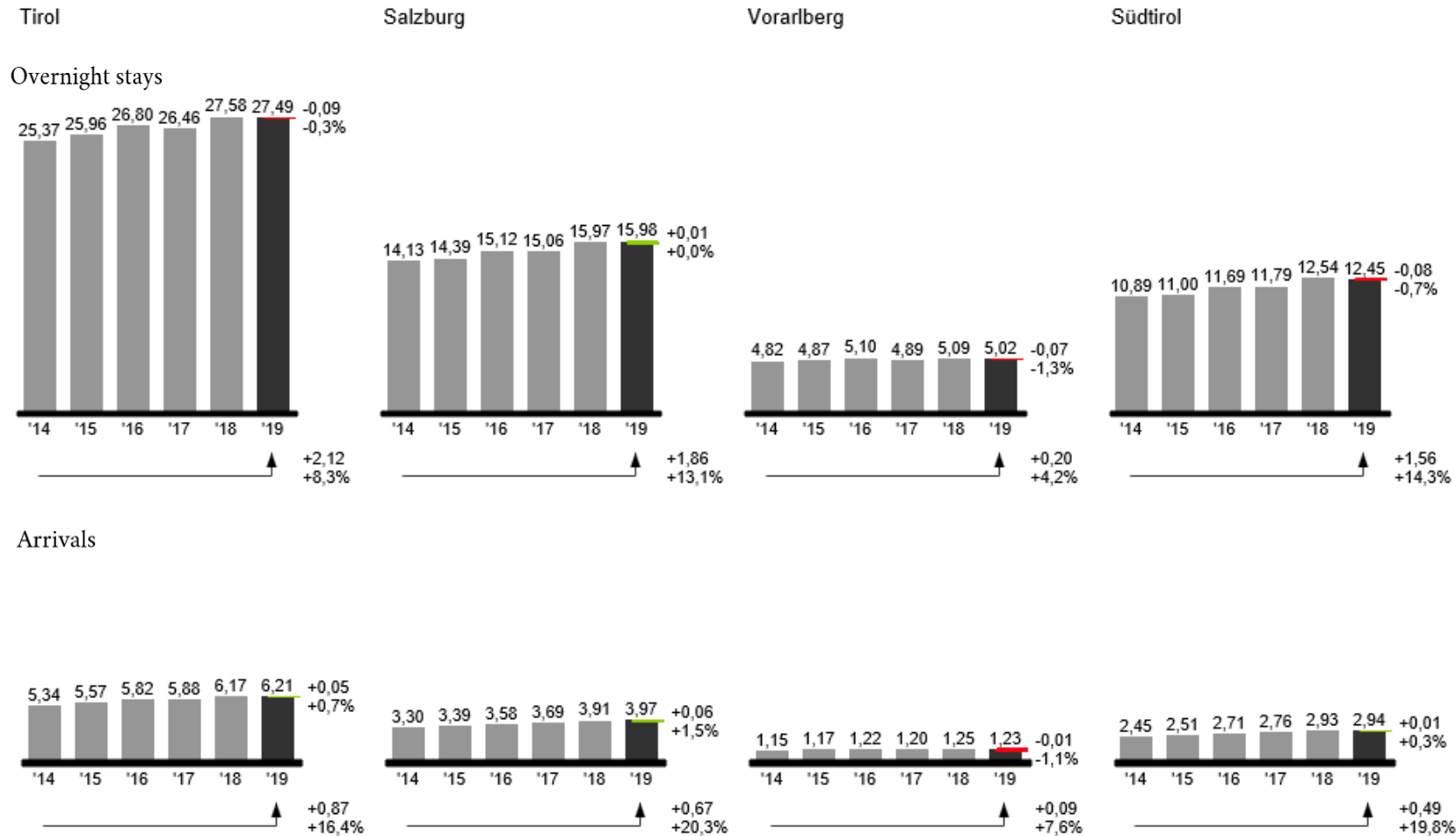
Source: Office of the Tirol State Government, Regional Development – Statistics; the occupancy rate is calculated for the entire season, i.e. possible days when the companies are closed cannot be taken into account in the Tirol-wide calculation.



Alpine competitors at a glance

Total amount of all markets of origin, 5-year comparison

Overnight stays & arrivals in millions and %, change from previous year and 5-year comparison winter 2013/14-2018/19

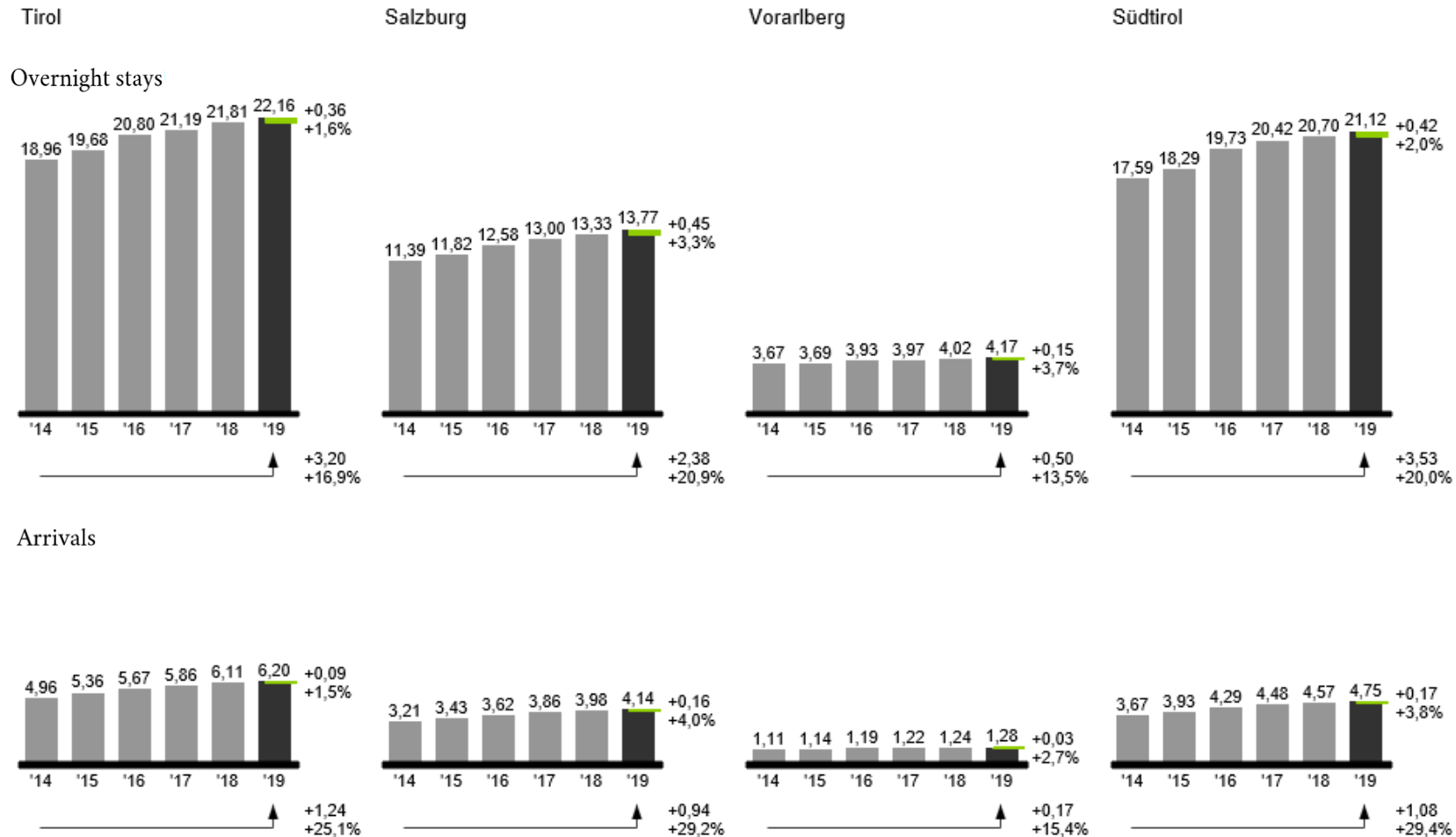


Selected competitors winter

Source: Office of the Tirol State Government, Regional Development - Statistics; TourMIS/Statistik Austria; Autonome Provinz Bozen – Südtirol, Landesinstitut für Statistik (Astat). Chart: Tirol Werbung

Total amount of all markets of origin, 5-year comparison

Overnight stays & arrivals in millions and %, change from previous year and 5-year comparison summer 2014-2019



Selected competitors summer

Source: Office of the Tirol State Government, Regional Development - Statistics; TourMIS/Statistik Austria; Autonome Provinz Bozen – Südtirol, Landesinstitut für Statistik (Astat). Chart: Tirol Werbung

Comparison of the most important competitors

Winter 2018/19:

- Tirol with 27.5 million overnight stays clearly ahead of Salzburg (16.0 million), South Tirol (12.5 million) and Vorarlberg (5.0 million). Salzburg remained constant compared to the previous year, all other regions recorded declines in overnight stays (Tirol - 0.3% or -90.000, South Tirol -0.7% or -80.000, Vorarlberg -1.3% or -70.000).
- Tirol with 6.2 million arrivals ahead of Salzburg (4.0 million), South Tirol (2.9 million) and Vorarlberg (1.2 million). Compared to the previous year, all regions, except Vorarlberg record increases in arrivals.
- Increases in overnight stays and arrivals were recorded in all regions over the last 5 years.

Summer 2019:

- With 22.2 million overnight stays Tirol on top ahead of South Tirol (21.1 million); Salzburg (13.8 million) and Vorarlberg (4.2 million) are behind. Most considerable growth in overnight stays in absolute numbers was recorded in Salzburg (+450.000), followed by South Tyrol (+420.000) and Tirol (+360.000).
- Tirol recorded 6.2 million arrivals and is ahead of South Tyrol with 4.8 million, Salzburg with 4.1 million and Vorarlberg with 1.3 million arrivals.
- Increases in overnight stays and arrivals were recorded in all regions over the last 5 years also in summer.



Economic importance of tourism in Tirol

Employment

- 55.000 people are employed in tourism in Tirol (employed, not full time equivalent).
- Tourism especially impacts the district Landeck (42%), but also in Kitzbühel (35%), Reutte (34%) and Imst (31%), tourism is a very important employer.
- Compared by the last 10 years the number of employees in tourism increased by about +16.000 or 42% - stronger than in any other economy sector

Tourism and leisure industry	Share
Hotels	58%
Gastronomy	26%
Health industry	8%
Leisure and sports industry	4%
Travel agencies	3%
Cinema, culture and amusement	0.5%
Total	100%

Expenditure and turnover

Daily expenditure of guests (incl. arrival) higher in winter than in summer:

winter € 185,- and summer € 144,-

- Of which approx. 52% for accommodation
- Approx. 13% for food and beverage
- Purchases about 9 % in summer and in winter
- Expenditure for cable cars, public transport much higher in winter (19% in winter vs. 9% in summer)
- About 5% für leisure time, culture, sports and wellness

Tourism in Tirol generates around € 8.4 billion turnover

- € 6.7 bn from overnight tourism
- € 1.7 bn from day visitors



Value creation

- Direct tourism value creation for Tirol is approximately € 4.5 bn
- This is a 17.5% share of the total value creation of Tirol
- For Austria the share of the direct value creation of tourism in the GDP is 6.5%
- By comparison: Upper Austria 4.0% and Vienna 2.2%



Reasons for visiting Tirol

Winter in Tirol

Holiday activities

- Sport: skiing ist THE sport activity; winter hiking is booming (after skiing the second most popular winter activity in Tirol); snowboarding and tobogganing especially popular by the younger guests
- Dining as an important holiday component: regional food and drinks are more important in summer than in winter
- Further important activities are walking in the nature, relaxing, sightseeing and shopping

Reasons for visiting Tirol in winter

- Sport opportunities and mountains
- Tirol has high competence in winter sports: attractive ski areas, guaranteed snow
- Nature, landscape and tranquillity
- Good experiences in the past
- Friendly locals, great hospitality
- Great accessibility
- Top accommodation

Summer in Tirol

Holiday activities

- A lot of different sport activities
- Sport: hiking is by far THE sports activity (importance increases with age); water activities attract many in summer; climbing, mountain biking and adventure sports are gaining importance for younger guests
- Beside sports also culture, enjoyment and relaxation are important
- Walking in the nature, sightseeing, trips outside the holiday resort, enjoying regional food and beverages

Reasons for visiting Tirol in summer

- Beautiful landscape/mountains and nature
- Sport opportunities, great variety of hiking trails, bicycle- and mountain bike tracks
- Peace and silence
- Hospitality
- Good experiences in the past
- Quality of accommodation
- Fresh air and healthy climate

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