Tourism in Tyrol
Facts and Figures 2021

Foto: Telfeser Wiesen – Mario Webhofer

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Arrivals and overnight stays in Tyrol

Arrivals and overnight stays at a glance

Arrivals

- Winter 2020/21: 0,1 Mio.
- Summer 2021: 4,9 Mio.
- Tourism year 2020/21: 5,1 Mio.

Overnight stays

- Winter 2020/21: 0,7 Mio.
- Summer 2021: 19,9 Mio.
- Tourism year 2020/21: 20,6 Mio.

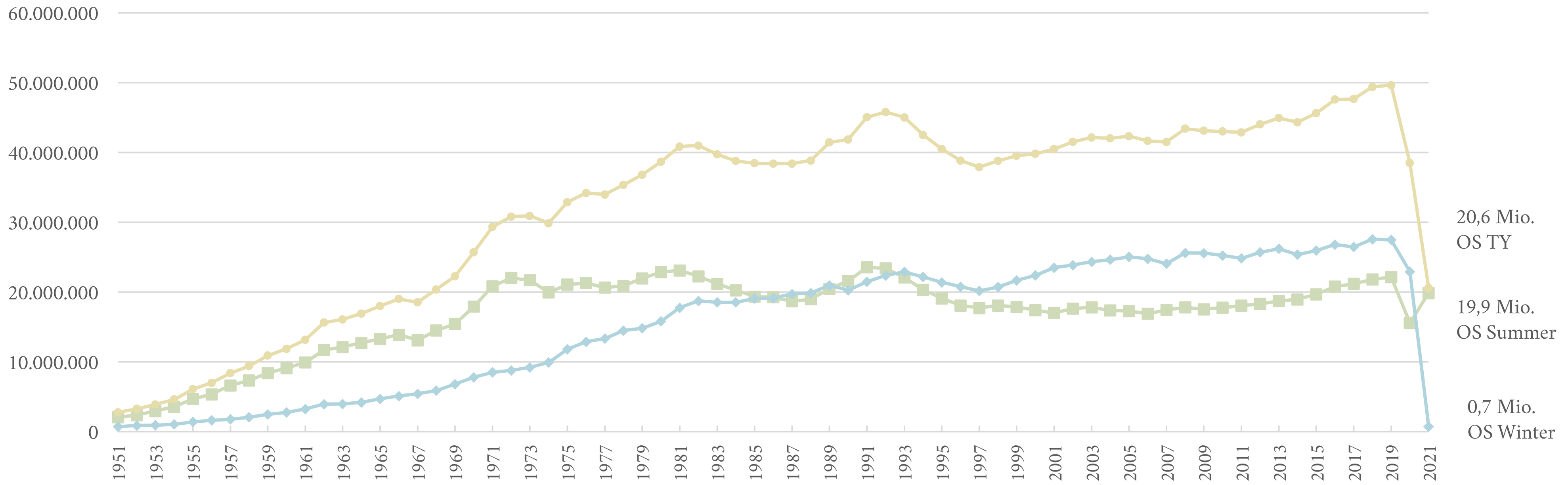
	Arrivals		
	Winter 2020/21	**Summer 2021**	**TY 2020/21**
Tyrol total	137.405	4.947.872	5.085.277
Prior year %	-97,2%	30,5%	-42,0%
Prior year abs.	-4.841.621	1.156.796	-3.684.825

	Overnight stays		
	Winter 2020/21	**Summer 2021**	**TY 2020/21**
Tyrol total	712.874	19.862.964	20.575.838
Prior year %	-96,9%	27,5%	-46,6%
Prior year abs.	-22.212.694	4287.528	-17.925.166

Source: Office of the Tyrol State Government, Regional Development and tiris

Development of overnight stays since 1951

- Compared to the steady growth of the past decades, the pandemic-related quasi-total cancellation of the winter season 2020/21 resulted in the lowest number of overnight stays in the development period. These accounted for only 3.5% of total overnight stays during the tourism year of 2020/21.
- In contrast, the summer was quite successful with almost 90% of the number of overnight stays in the pre-crisis year 2019.



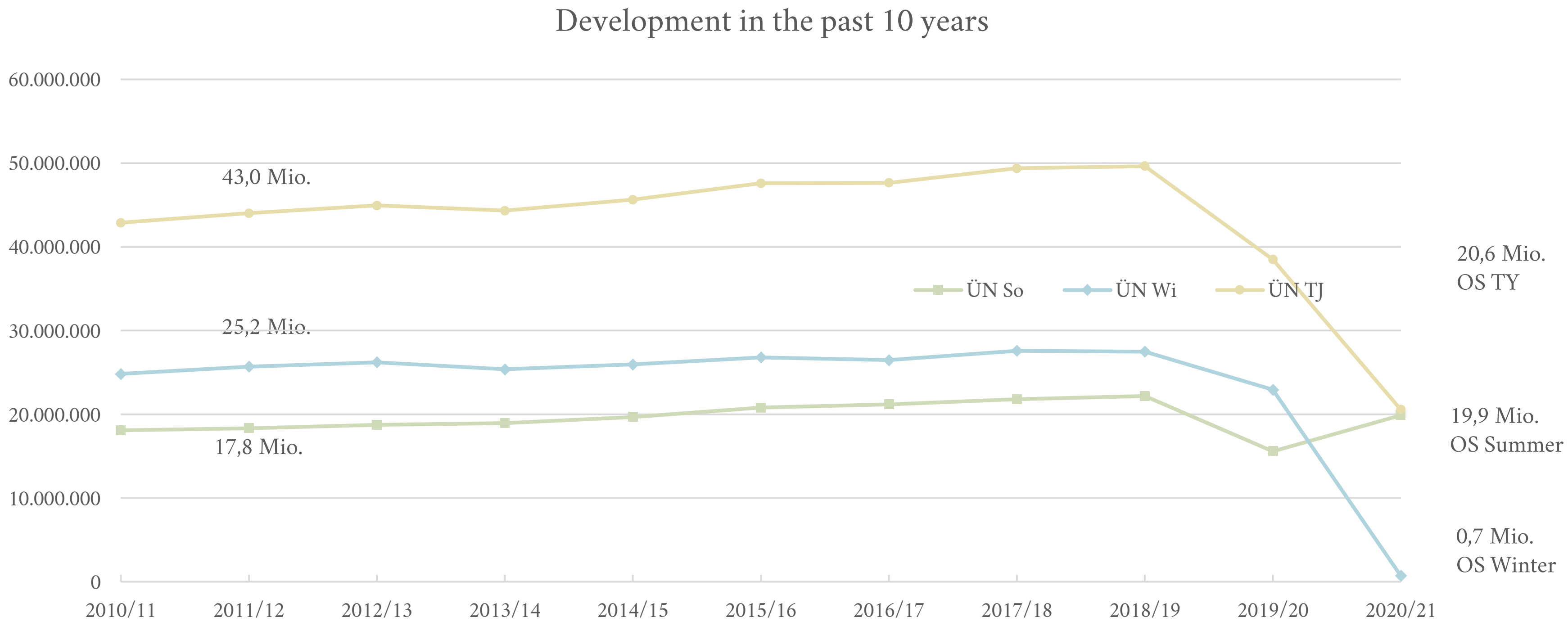
Source: Office of the Tyrol State Government, Regional Development and tiris

Development in the past 10 years

Tourism year:
- Arrivals -42,0%
- Overnight stays -46,6%

Winter:
- Arrivals -97,2%
- Overnight stays -96,9%

Summer:
- Arrivals +30,5%
- Overnight stays +27,5%



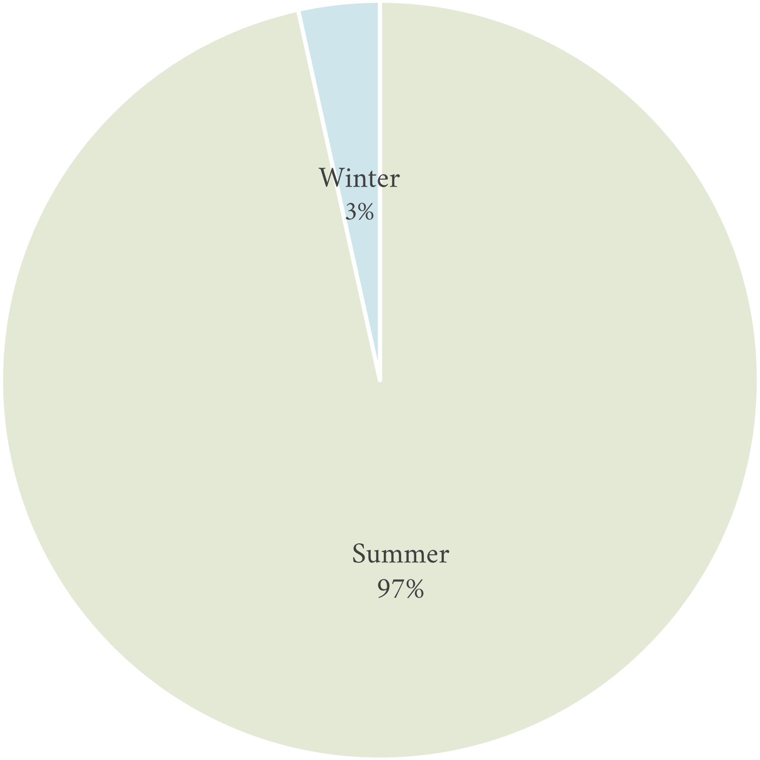
Source: Office of the Tyrol State Government, Regional Development and tiris

Foto: Thomas Vielgut

Duration of stay

- The average duration of stay of guests in Tyrol steadily declined over the past 10 tourism year from 4.6 to 4.0 days
- Trend towards shorter, yet more numerous vacations
- Guests stay longer in Tyrol during Winter than during Summer
  - Winter 2020/21: 5,2 days
  - Summer 2021: 4,0 days

Source: Office of the Tyrol State Government, Regional Development and tiris



- **Tourism year 2020/21:**
  Due to the lockdown in winter 20/21, there was practically only a summer season in this TY with 97% share of total overnight stays
- **Tourism year 2010/11:**
  inter was still significantly stronger than the summer season in TY 10/11, at approx. 58% of overnight stays

Distribution of the seasons

Source: Office of the Tyrol State Government, Regional Development and tiris

Foto: Verena Kathrein

Markets of origin

Rank	Market of origin	Overnight Stays		Arrivals		Duration of stay	Market share
		Wi 20/21	% prior year	Wi 20/21	% prior year		
1	Austria	354.349	-75,6%	90.790	-80,9%	3,9	49,7%
2	Germany	83.736	-99,3%	17.699	-99,3%	4,7	11,7%
3	Poland	56.671	-87,7%	2.972	-96,2%	19,1	7,9%
4	Slowakia	32.365	-62,9%	1.913	-88,0%	16,9	4,5%
5	Hungary	24.644	-70,8%	1.862	-87,7%	13,2	3,5%
6	Italy	21.373	-90,8%	4.799	-94,9%	4,5	3,0%
7	Czech Republic	17.818	-96,1%	2.037	-98,1%	8,7	2,5%
8	Slovenia	13.330	-70,3%	1.693	-83,3%	7,9	1,9%
9	Switzerland and Liechtenstein	12.646	-98,8%	2.789	-98,8%	4,5	1,8%
10	Romania	10.607	-94,2%	828	-97,3%	12,8	1,5%
11	United Kingdom	8.389	-99,1%	725	-99,6%	11,6	1,2%
12	Croatia	7.055	-75,1%	606	-89,6%	11,6	1,0%
13	Fromer Yugoslawia	6.572	-69,7%	540	-85,9%	12,2	0,9%
14	The Netherlands	5.837	-99,8%	1.155	-99,8%	5,1	0,8%
15	USA	5.427	-95,6%	728	-97,8%	7,5	0,8%
	Other Markets	52.055	-98,3%	6.269	-99,0%	8,3	7,3%
	Tyrol total	**712.874**	**-96,9%**	**137.405**	**-97,2%**	**5,2**	**100,0%**

Source markets during winter 2020/21

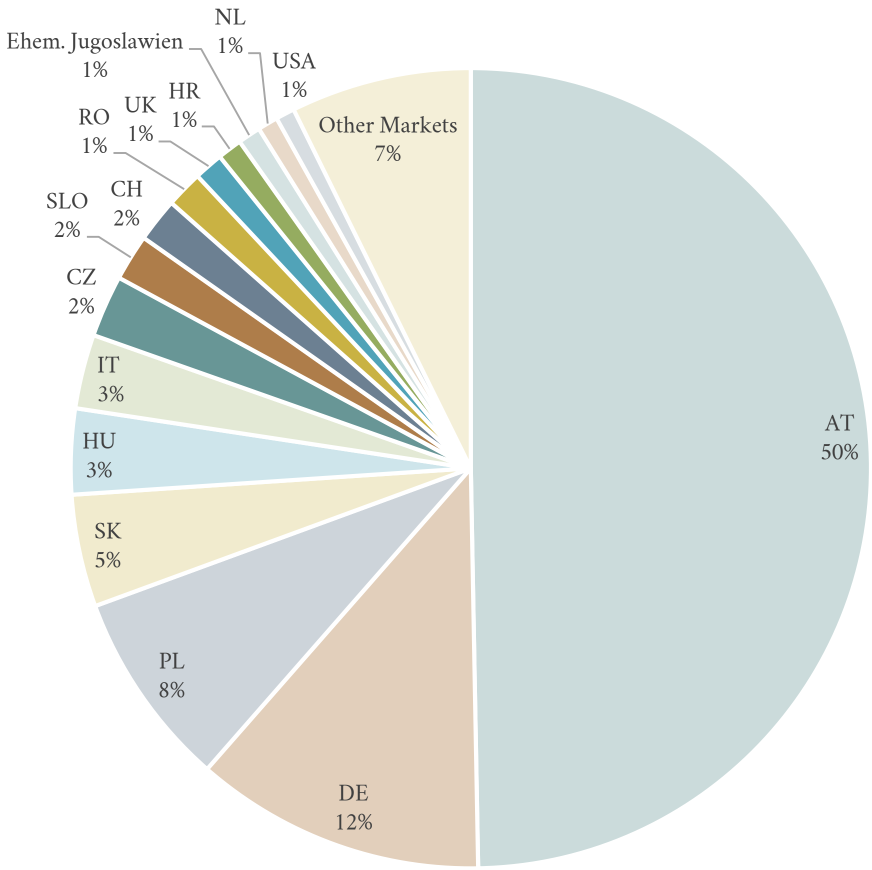
Source: Office of the Tyrol State Government, Regional Development and tiris

Source markets during winter in the past 10 years

- In the winter of 2020/21, most vacationists were domestic, yet there was a comparatively sharp drop compared with a normal season, too.
- Sharp declines in all areas due to COVID 19 pandemic; thus, also negative impact on long-term comparisons
- Netherlands from 2nd place in winter 19/20 now with 99.8% decrease, Germany from 1st place also strongly affected with 99.3% decrease
- Slavic markets in neighboring Eastern European countries show the smallest declines, mainly due to guest and seasonal workers

Rank	Market of origin	Winter season 2020/21		
		OS	Market share	% 10/11 - 20/21
1	Austria	354.349	49,7%	-79,5%
2	Germany	83.736	11,7%	-99,3%
3	Poland	56.671	7,9%	-89,5%
4	Slowakia	32.365	4,5%	-55,1%
5	Hungary	24.644	3,5%	-69,5%
6	Italy	21.373	3,0%	-93,4%
7	Czech Republic	17.818	2,5%	-96,0%
8	Slovenia	13.330	1,9%	-61,6%
9	Switzerland & Liechtenstein	12.646	1,8%	-98,7%
10	Romania	10.607	1,5%	-94,6%
11	United Kingdom	8.389	1,2%	-99,2%
12	Croatia	7.055	1,0%	-77,4%
13	Fromer Yugoslawia	6.572	0,9%	-41,4%
14	The Netherlands	5.837	0,8%	-99,8%
15	USA	5.427	0,8%	-93,5%
	Other Markets	52.055	7,3%	-98,5%
	Tyrol total	**712.874**	**100,0%**	-97,1%

Source: Office of the Tyrol State Government, Regional Development and tiris



- Austria's share of overnight stays is just about 50%
- The top 3 markets Austria, Germany and Poland account for a total of 69% of overnight stays
- Massive market share changes and declines compared to the last 10 years in winter:
- Germany loses -40 percentage points of market share, 11 of the top 15 markets with more than -75% decline, 9 of them even with more than -90% decline
- The winter of 2020/21 is statistically an absolute outlier and cannot be adequately compared with previous years

Source markets in winter 2020/21

Source: Office of the Tyrol State Government, Regional Development and tiris

Rank	Market of origin	Overnight Stays		Arrivals		Duration of stay	Market share
		Su 2021	% prior year	Su 2021	% prior year		
1	Germany	12.464.071	33,9%	2.951.766	38,2%	4,2	62,8%
2	Austria	2.392.234	2,1%	831.830	5,1%	2,9	12,0%
3	The Netherlands	1.529.378	29,6%	344.120	41,4%	4,4	7,7%
4	Switzerland and Liechtenstein	983.111	-8,9%	238.677	-8,2%	4,1	4,9%
5	Belgium	552.949	36,5%	101.828	39,0%	5,4	2,8%
6	Italy	386.665	23,3%	104.924	28,9%	3,7	1,9%
7	Czech Republic	251.324	33,6%	66.768	39,1%	3,8	1,3%
8	France (incl. Monaco)	215.804	16,7%	50.216	18,3%	4,3	1,1%
9	Poland	158.952	23,5%	29.132	36,6%	5,5	0,8%
10	Denmark	101.730	166,7%	34.200	185,4%	3,0	0,5%
11	Hungary	87.842	37,9%	20.803	57,7%	4,2	0,4%
12	Luxemburg	82.632	44,3%	16.058	42,0%	5,1	0,4%
13	Israel	71.436	4055,7%	20.873	3020,0%	3,4	0,4%
14	Slowakia	68.667	29,9%	10.027	32,5%	6,8	0,3%
15	Romania	45.343	76,9%	9.172	169,5%	4,9	0,2%
	Other Markets	470.826	131,3%	117.478	158,2%	4,0	2,4%
	Tyrol total	**19.862.964**	**27,5%**	**4.947.872**	**30,5%**	**4,1**	**100,0%**

Source markets in Summer 2021

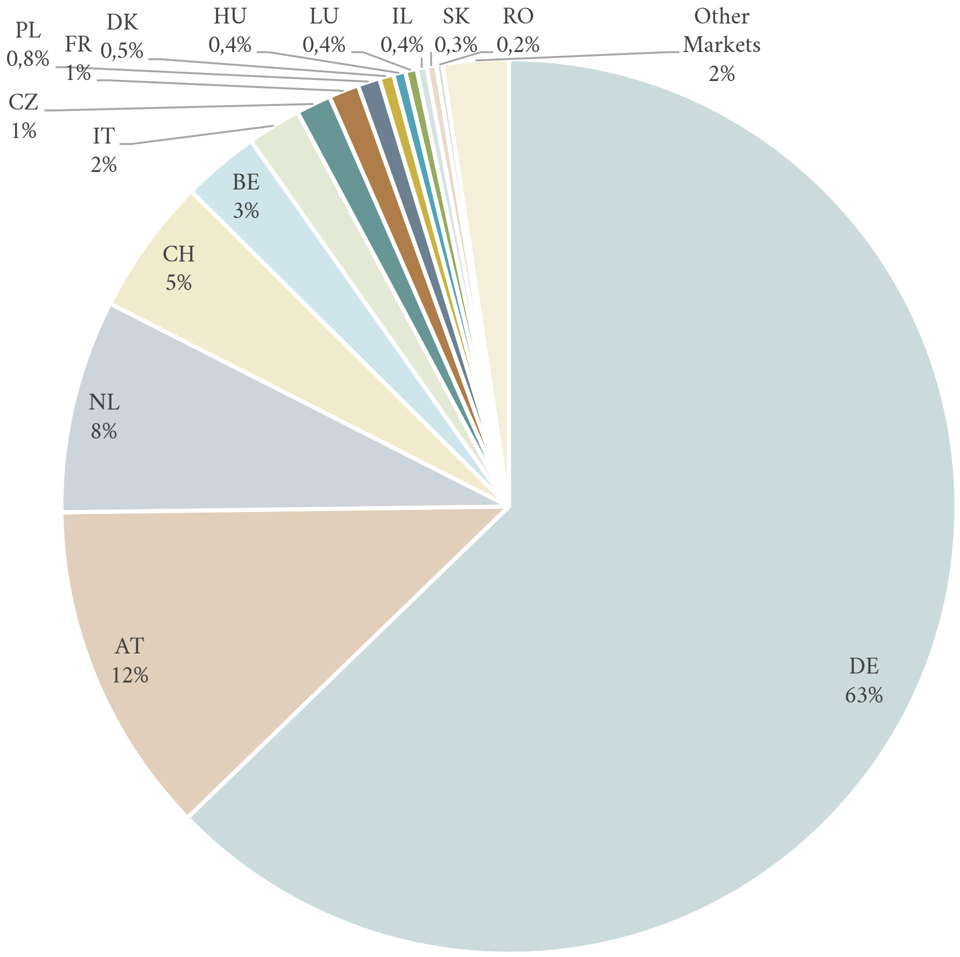
Source: Office of the Tyrol State Government, Regional Development and tiris

Source markets in summer over the past 10 years

- Germany still the clear No. 1 in overnight stays in summer, even with considerable growth
- Austria in 2nd place in summer, just like in 2020, ahead of the Netherlands
- High declines in overnight stays for France and Italy in the last 10 years in summer, Denmark and Switzerland also noticeably declining
- Compared to last year, summer 2021 is marked by significant growth for many markets in the top 15
- The effects of the pandemic are still being felt, especially on intercontinental markets; on average, the number of overnight stays is close to the pre-crisis level.

Rank	Market of origin	Summer season 2021		
		OS	Market share	% 2011-21
1	Germany	12.465.881	62,8%	33,0%
2	Austria	2.391.690	12,0%	20,0%
3	The Netherlands	1.529.296	7,7%	7,3%
4	Switzerland and Liechtenstein	983.164	4,9%	-28,8%
5	Belgium	552.993	2,8%	-6,2%
6	Italy	386.866	1,9%	-47,0%
7	Czech Republic	251.335	1,3%	76,1%
8	France (incl. Monaco)	215.822	1,1%	-62,8%
9	Poland	159.055	0,8%	89,1%
10	Denmark	101.732	0,5%	-27,6%
11	Hungary	87.878	0,4%	11,9%
12	Luxemburg	82.630	0,4%	44,3%
13	Israel	71.436	0,4%	15,6%
14	Slowakia	68.668	0,3%	145,9%
15	Romania	45.375	0,2%	20,4%
	Other Markets	471.089	2,4%	-65,6%
	Tyrol total	**19.864.910**	**100,0%**	**-12,4%**

Source: Office of the Tyrol State Government, Regional Development and tiris



- In summer, Germany accounts for almost 63% of overnight stays
- The top three markets Germany, Austria and the Netherlands account for a total of 82.5% of overnight stays
- Significant increase in market share for Germany in the 10-year comparison (52% in summer 2011), an increase of 10.9 percentage points
- Little fluctuation in the remaining top 15 markets, Austria gaining +1 percentage point, Switzerland losing -2.7, Italy and France both -2.1 percentage points. All other fluctuations are in the range of 0,... percentage points, the other markets, outside the top 15, are still worth mentioning with an overall decline of -5.2 percentage points

Source markets in summer 2021

Source: Office of the Tyrol State Government, Regional Development and tiris

Rank	Market of origin	Overnight stays		Arrivals		Duration of stay	Market share
		TY 2020/21	% prior year	TY 2020/21	% prior year		
1	Germany	12.547.807	-40,0%	2.969.465	-36,3%	4,2	61,0%
2	Austria	2.746.583	-27,7%	922.620	-27,1%	3,0	13,3%
3	The Netherlands	1.535.215	-64,5%	345.275	-56,7%	4,4	7,5%
4	Switzerland and Liechtenstein	995.757	-52,5%	241.466	-50,8%	4,1	4,8%
5	Belgium	556.615	-52,5%	102.226	-52,2%	5,4	2,7%
6	Italy	408.038	-25,1%	109.723	-37,4%	3,7	2,0%
7	Czech Republic	269.142	-58,1%	68.805	-55,7%	3,9	1,3%
8	France (incl. Monaco)	220.519	-52,6%	51.033	-47,7%	4,3	1,1%
9	Poland	215.623	-63,5%	32.104	-67,6%	6,7	1,0%
10	Hungary	112.486	-24,0%	22.665	-19,9%	5,0	0,5%
11	Denmark	102.694	-74,9%	34.329	-57,9%	3,0	0,5%
12	Slowakia	101.032	-27,9%	11.940	-49,1%	8,5	0,5%
13	Luxemburg	83.521	-57,4%	16.185	-54,0%	5,2	0,4%
14	Israel	71.526	0,9%	20.932	54,7%	3,4	0,3%
15	Romania	55.950	-73,3%	10.000	-70,7%	5,6	0,3%
	Other markets	553.330	-80,1%	126.509	-78,8%	4,4	2,7%
	Tyrol total	**20.575.838**	**-46,6%**	**8.771.308**	**-42,0%**	**2,3**	**100,0%**

Source markets in the Tourism year 2020/21

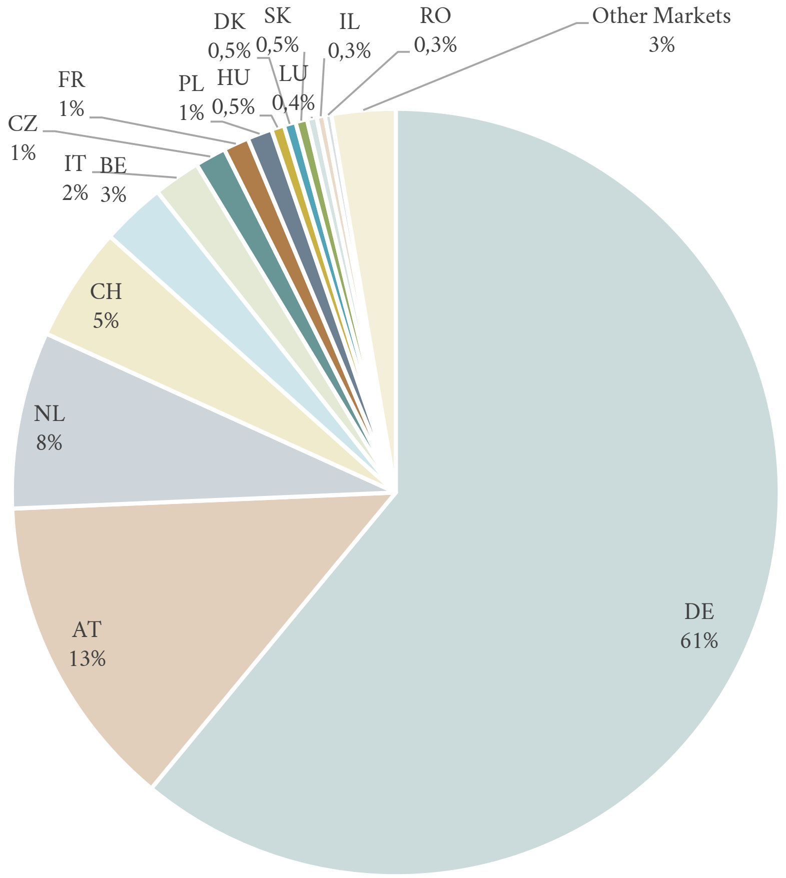
Source: Office of the Tyrol State Government, Regional Development and tiris

Source markets during the TY over the past 10 years

- In the tourism year 2020/21, Germany is in the lead with more than half of all overnight stays in Tyrol
- Austria in second place ahead of the Netherlands with increased market share
- Significant to very high declines in arrivals and overnight stays for the majority of the top 15 source markets over the past 10 years, especially for non-European markets
- Due to the weak winter season caused by the COVID 19 pandemic, the entire 2020/21 tourism year will also see significant declines; and thus, also negative development in long-term comparisons

Rank	Market of origin	Tourism year 2020/21		
		OS	Market share	% 2011-21
1	Germany	12.547.807	2.969.465	61,0%
2	Austria	2.746.583	922.620	13,3%
3	The Netherlands	1.535.215	345.275	7,5%
4	Switzerland & Liechtenstein	995.757	241.466	4,8%
5	Belgium	556.615	102.226	2,7%
6	Italy	408.038	109.723	2,0%
7	Czech Republic	269.142	68.805	1,3%
8	France (incl. Monaco)	220.519	51.033	1,1%
9	Poland	215.623	32.104	1,0%
10	Hungary	112.486	22.665	0,5%
11	Denmark	102.694	34.329	0,5%
12	Slowakia	101.032	11.940	0,5%
13	Luxemburg	83.521	16.185	0,4%
14	Israel	71.526	20.932	0,3%
15	Romania	55.950	10.000	0,3%
	Other markets	553.330	126.509	2,7%
	Tyrol total	**20.575.838**	**5.085.277**	**100,0%**

Source: Office of the Tyrol State Government, Regional Development and tiris



- Germany with 61% share of total overnight stays in tourism year 2020/21
- The top 3 markets Germany, the Netherlands and Austria account for a total of 82% of overnight stays
- In a 10-year comparison, Germany is gaining market share - in TY 2010/11, the share was 51%
- Austria also gains market share (+4.7 pp), while the Netherlands (-3.7 pp) and other markets (-7.1 pp) in particular lose market share; the relatively good summer balances the fluctuations in the remaining Top 15 markets (-0.1 to -1.1 pp)

Source markets in Tourism year 2020/21

Source: Office of the Tyrol State Government, Regional Development and tiris

Foto: Obertilliach, Osttirol – Charly Schwarz

Tourism associations and municipalities

Top 15 tourism associations by overnight stays

- Innsbruck Tourism at the top thanks to a strong summer (winter rank 1 and summer rank 2)
- Ötztal Tourismus in 2nd place (winter rank 4, summer rank 1) ahead of Osttirol (winter rank 3, summer rank 3)
- Strong shifts in winter, the entire tourism year strongly resembles the summer result. Paznaun-Ischgl dropped back to rank 21 with rank 33 in winter only ahead of Serfaus-Fiss-Ladis

Tourism association	OS TY 20/21	% prior year	Rank	OS Wi 20/21	% prior year	Rank	OS Su 21	% prior year	Rank
Innsbruck Tourismus	1.379.479	-34,1%	1	173.093	-85,8	1	1.206.386	38,0%	2
Ötztal Tourismus	1.293.989	-60,6%	2	37.861	-98,4	4	1.256.128	29,3%	1
Osttirol	1.223.047	-34,5%	3	63.164	-92,3	3	1.159.883	11,0%	3
Erste Ferienregion im Zillertal	1.075.672	-46,5%	4	19.529	-98,4	10	1.056.143	30,8%	5
Wilder Kaiser	1.070.325	-37,8%	5	8.335	-99,1	26	1.061.990	37,8%	4
Achensee	1.018.192	-24,7%	6	10.847	-98,0	20	1.007.345	22,6%	6
Serfaus-Fiss-Ladis	942.459	-56,7%	7	886	-99,9	34	941.573	14,8%	7
Olympiaregion Seefeld	924.417	-42,2%	8	17.516	-98,1	12	906.901	31,6%	8
Mayrhofen - Hippach	858.520	-51,9%	9	5.233	-99,5	28	853.287	32,0%	9
Tiroler Zugspitz Arena	857.063	-38,7%	10	5.374	-99,3	27	851.689	26,3%	10
Stubai Tirol	746.363	-45,8%	11	9.381	-98,9	24	736.982	36,1%	11
Tannheimer Tal	641.819	-29,5%	12	2.607	-99,4	31	639.212	31,5%	12
Tux-Finkenberg	608.663	-45,5%	13	4.228	-99,4	29	604.435	48,6%	13
Kitzbüheler Alpen - Brixental	604.745	-55,6%	14	13.252	-98,5	15	591.493	25,4%	14
Tiroler Oberland	602.839	-49,6%	15	12.415	-98,3	18	590.424	23,3%	15

Source: Office of the Tyrol State Government, Regional Development and tiris

Top 15 tourism associations by occupancy in %

- The winter season was practically non-existent, with Kufsteinerland recording the highest occupancy rate at 7.3%.
- In summer, on the other hand, Achensee (60.3%) achieved good results, just ahead of Kitzbüheler Alpen (59.8%) and Tannheimer Tal (51.9%)
- For Tyrol as a whole, the occupancy rate in winter is 1.8% and thus significantly below the summer (32.8%)

Rank	Tourism association	Winter 2020/21
1	Kufsteinerland	7,3
2	Region Hall – Wattens	6,8
3	Innsbruck Tourismus	6,1
4	Silberregion Karwendel	4,8
5	Naturparkregion Reutte	3,6
6	Kitzbüheler Alpen - St. Johann ...	3,2
7	Ferienregion Hohe Salve	2,9
8	Tirol West	2,8
9	Imst Tourismus	2,4
10	Kitzbühel Tourismus	2,3
11	Osttirol	2,0
12	Alpbachtal	1,7
13	Wipptal	1,7
14	Pillerseetal	1,6
15	Wildschönau	1,5

Rank	Tourism association	Summer 2021
1	Achensee	60,3
2	Kitzbüheler Alpen - St. Johann ...	59,8
3	Tannheimer Tal	51,9
4	Kaiserwinkl	49,0
5	Wilder Kaiser	43,8
6	Tux-Finkenberg	42,2
7	Olympiaregion Seefeld	40,2
8	Tiroler Zugspitz Arena	39,4
9	Naturparkregion Reutte	38,4
10	Stubai Tirol	36,1
11	Serfaus-Fiss-Ladis	34,7
12	Innsbruck Tourismus	34,2
13	Kufsteinerland	33,4
14	Imst Tourismus	33,3
15	Tiroler Oberland	31,9

Source: Office of the Tyrol State Government, Regional Development and tiris; Additional remark: The occupancy rate is calculated over the entire season, i.e. any closing days of the businesses cannot be taken into account in the Tyrol-wide calculation.

Top 15 municipalities with most overnight stays

- Eben/Achensee ahead of Innsbruck at the top of the community ranking (despite winter rank 61, summer rank 1)
- Innsbruck in second place (winter rank 1, summer rank 2) ahead of Sölden (winter rank 20, summer rank 3)
- Here also strong shifts similar to the Tourism associations due to the weak winter season, the annual result coincides with the summer result

Municipality	OS TY 2020/21	Rank	OS Wi 2020/21	Rank	OS Su 2021	Rank
Eben/Achensee	690.643	1	2.975	61	687.668	1
Innsbruck	632.148	2	82.662	1	549.486	2
Sölden	550.764	3	7.502	20	543.262	3
Mayrhofen	539.757	4	1.915	88	537.842	4
Neustift/Stubaital	538.278	5	6.042	26	532.236	5
Seefeld/Tirol	501.103	6	8.481	16	492.622	6
Ellmau	460.776	7	3.380	55	457.396	7
Tux	453.320	8	3.444	53	449.876	8
Serfaus	432.132	9	516	177	431.616	9
Fiss	358.007	10	351	200	357.656	10
Längenfeld	329.558	11	1.881	92	327.677	11
Kössen	324.130	12	1.766	97	322.364	12
Kirchberg/Tirol	321.083	13	9.206	13	311.877	13
Wildschönau	301.858	14	7.164	21	294.694	14
Fügen	298.813	15	7.093	22	291.720	15

Source: Office of the Tyrol State Government, Regional Development and tiris

Foto: David Schreyer

Tyrolean accommodations

Number of beds and accomodation establishments

- Tyrol has about 284,600 beds in winter and 322,300 beds in summer
- About every second bed in Tyrol is in the hotel industry, about 41% in vacation apartments and about 7% in private accommodation
- Strong decline in the number of beds in private accommodation over the last 10 years, but significant increase in the number of vacation apartments
- Hotel industry: declines for 2/1-star and 3-star establishments, 4/5-star with increasing number of beds in summer

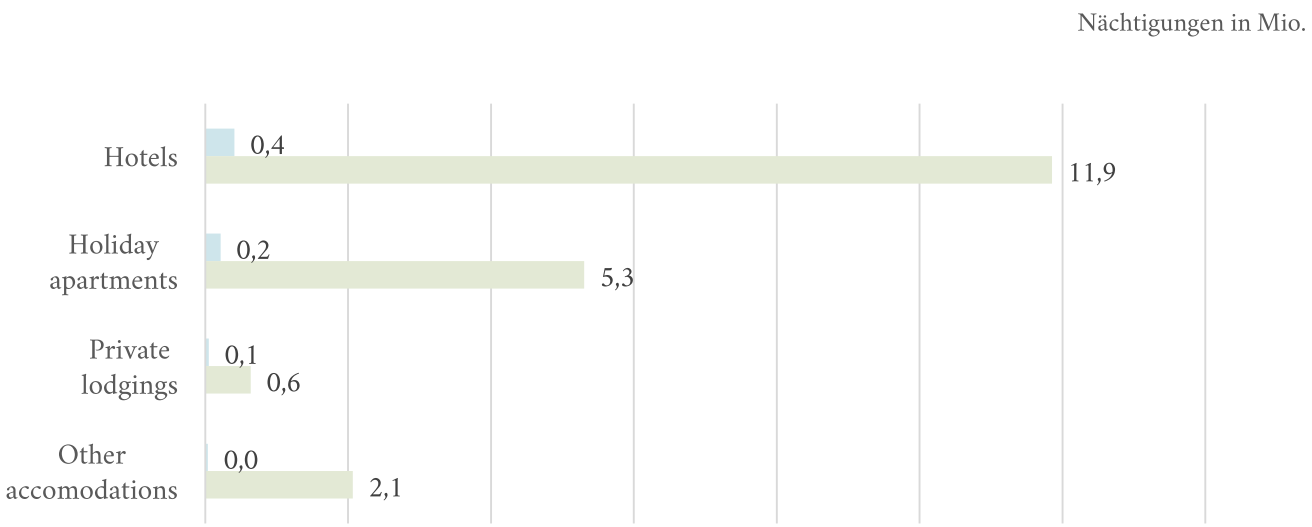
Accommodation categories	Beds Winter		Beds Summer	
	2020/21	% 10/11-20/21	2021	% 11-21
Hotels	**136.187**	-22,9%	**160.394**	-5,6%
Holiday apartments	**117.151**	3,7%	**124.997**	14,9%
Private lodgings	**20.100**	-47,0%	**20.518**	-45,5%
Other accomodations	**11.160**	-11,7%	**16.410**	-5,9%
Tyrol total	**284.598**	**-16,4%**	**322.319**	**-3,4%**

Accommodation categories	Establishments Winter		Establishments Summer	
	2020/21	% 10/11-20/21	2021	% 11-21
Hotels	2.687	-33,1%	3.206	-17,3%
Holiday apartments	13.298	-1,2%	13.972	6,5%
Private lodgings	2.762	-48,3%	2.825	-47,1%
Other accomodations	459	-4,6%	739	1,9%
Tyrol total	**19.206**	**-17,6%**	**20.742**	**-10,1%**

Source: Office of the Tyrol State Government, Regional Development and tiris

Overnight stays in accommodation categories 2020/21

- About 6 out of 10 overnight stays in the Tyrol still accounted for by the hotel industry
- Private accommodation continues to decline sharply, even in summer (significant drop in bed supply in this segment)
- In a 10-year comparison, strong growth in overnight stays mainly for vacation apartments (winter is left out here due to the lockdown)



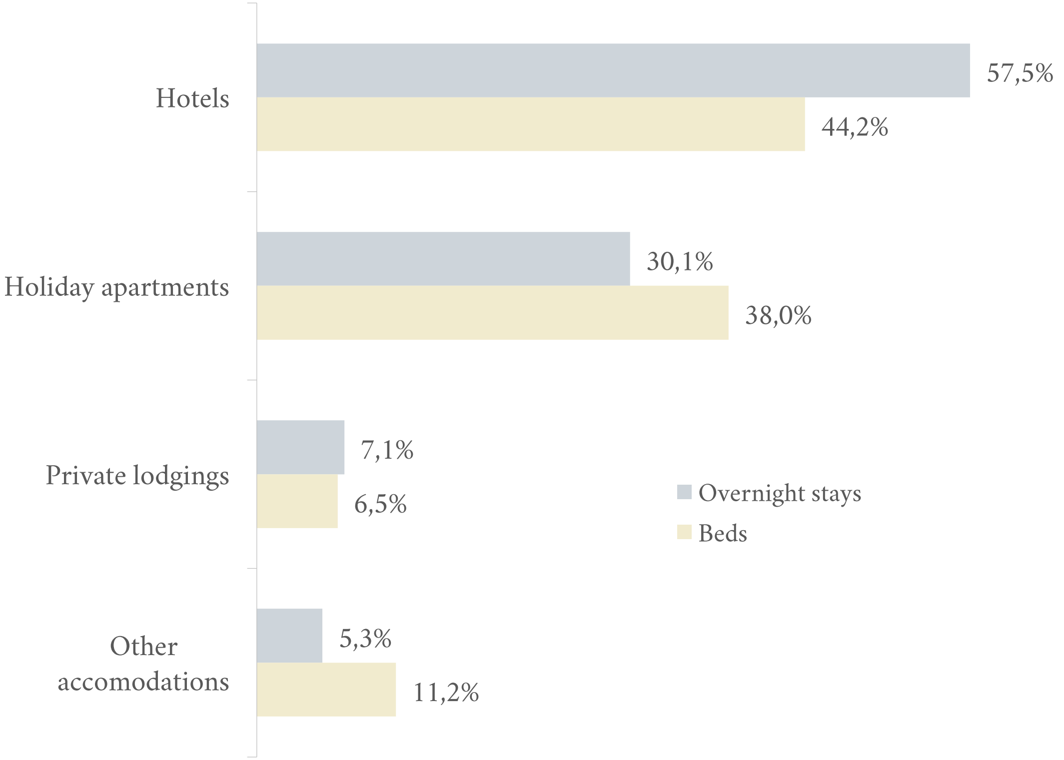
Accommodation categories	OS Winter 2020/21	% 2011-21
Hotels	410.136	-97,3%
Holiday apartments	214.531	-96,9%
Private lodgings	50.442	-96,6%
Other accomodations	37.765	-95,5%
Tyrol total	**712.874**	**-97,1%**

Accommodation categories	OS Summer 2021	% 2011-21
Hotels	11.853.263	-2,9%
Holiday apartments	5.306.010	59,3%
Private lodgings	637.692	-30,8%
Other accomodations	2.067.945	28,4%
Tyrol total	**19.864.910**	**10,0%**

Source: Office of the Tyrol State Government, Regional Development and tiris

Ratio of overnight stays to beds in winter

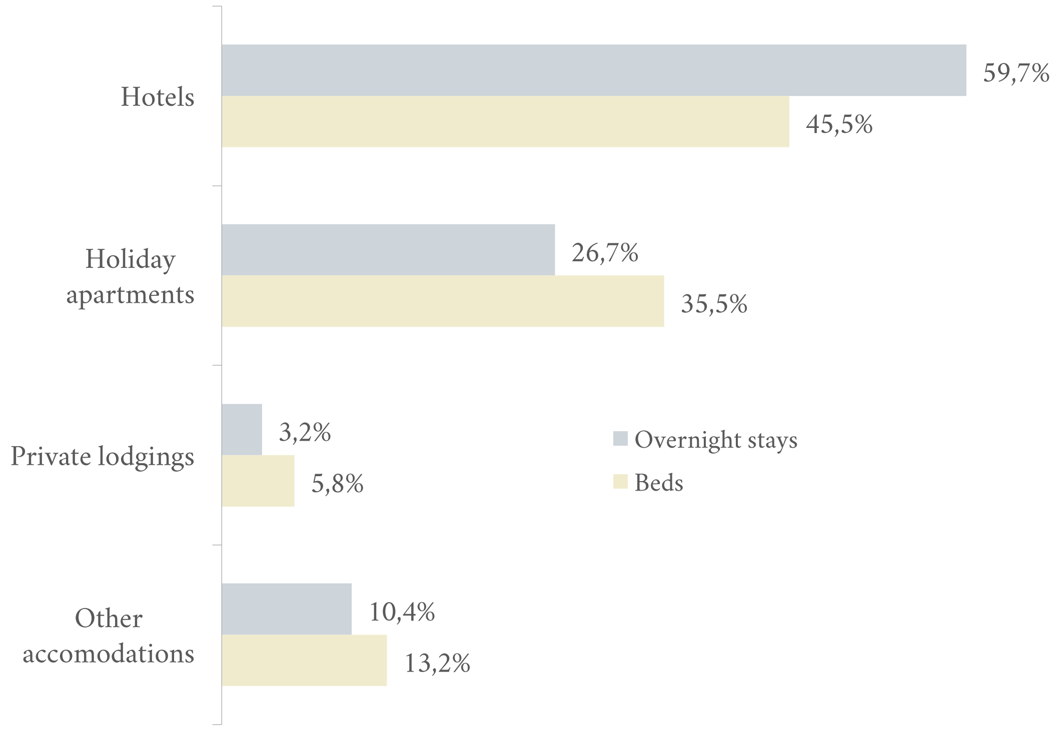
- Around every second bed is accounted for by the hotel industry
- The hotel industry generates about 60% of all overnight stays in Tyrol
- Private accommodation and vacation apartments were again slightly more frequented this winter, otherwise the situation is almost unchanged



Source: Office of the Tyrol State Government, Regional Development and tiris

Ratio of overnight stays to beds in summer

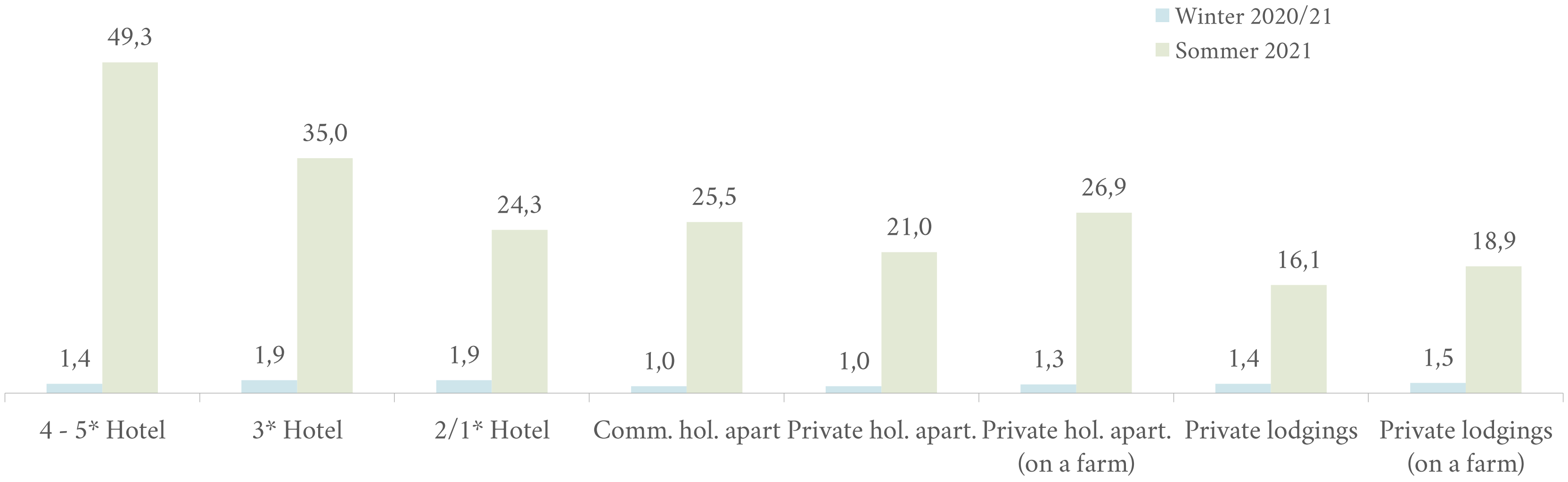
- Around half of all beds are accounted for by the hotel industry
- This sector generates almost 60% of all overnight stays in Tyrol
- Vacation apartments are frequented significantly below average



Source: Office of the Tyrol State Government, Regional Development and tiris

Occupancy in %

- Highest occupancy rates in summer in the upscale hotel industry, winter season virtually non-existent
- Businesses generally significantly better utilized in summer than in the previous year
- Occupancy rate Tyrol total: winter 3.6%, summer 27.7%



Source: Office of the Tyrol State Government, Regional Development and tiris; Additional remark: The occupancy rate is calculated over the entire season, i.e. any closing days of the businesses cannot be taken into account in the Tyrol-wide calculation.

Occupancy in days

Occupancy Tyrol in total:

- Winter: 6,6 days of full occupation (winter season: 181 days)
- Summer: 51 days of full occupation (summer season: 184 days)

Source: Office of the Tyrol State Government, Regional Development and tiris; Additional remark: The occupancy rate is calculated over the entire season, i.e. any closing days of the businesses cannot be taken into account in the Tyrol-wide calculation.


Foto: Elias Bachmann

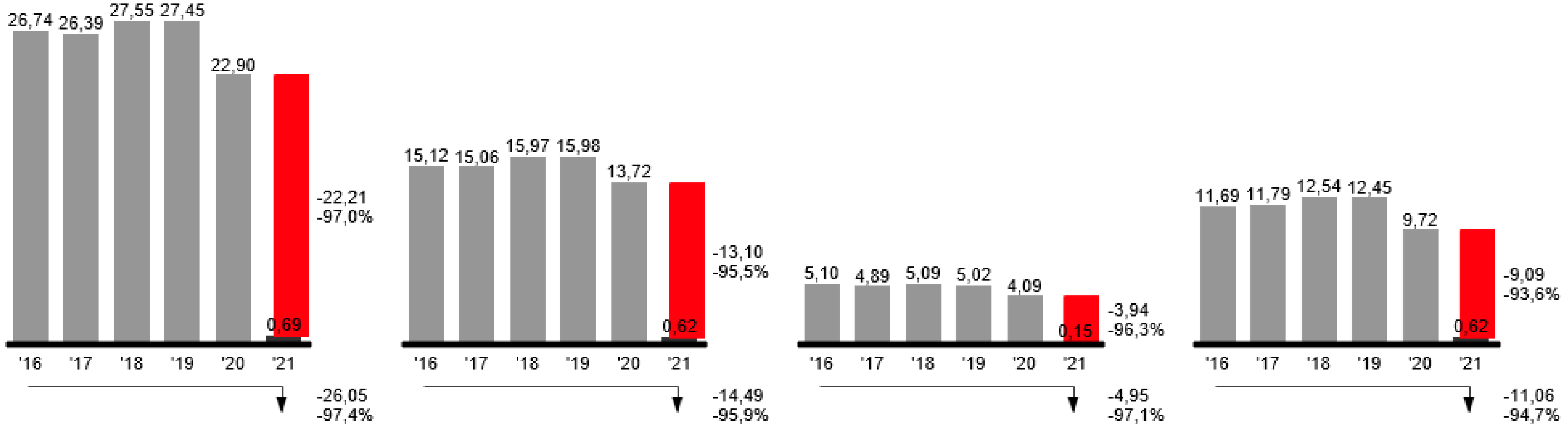
Alpine competitors at a glance

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

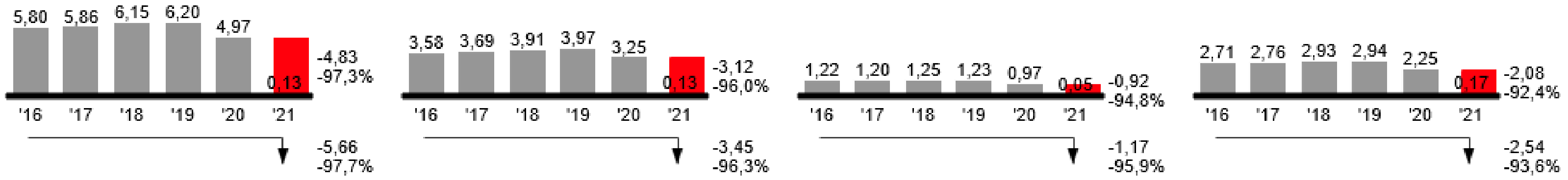
Overnight stays & arrivals in millions and %, change from previous year and 5-year comparison winter 2015/16 – 2020/21

Tyrol Salzburg Vorarlberg South Tyrol

Overnight stays



Arrivals



Selected competitors winter

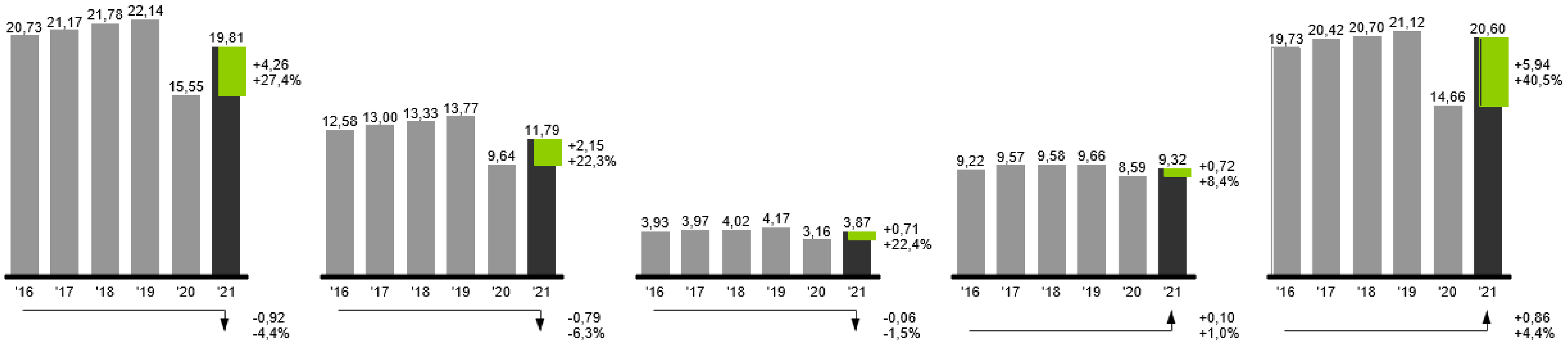
Source: Office of the Tyrol State Government, Regional Development -Statistics; TourMIS/StatistikAustria; AutonomeProvinz Bozen –Südtirol, Landesinstitut für Statistik (Astat).Chart: Tirol Werbung

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

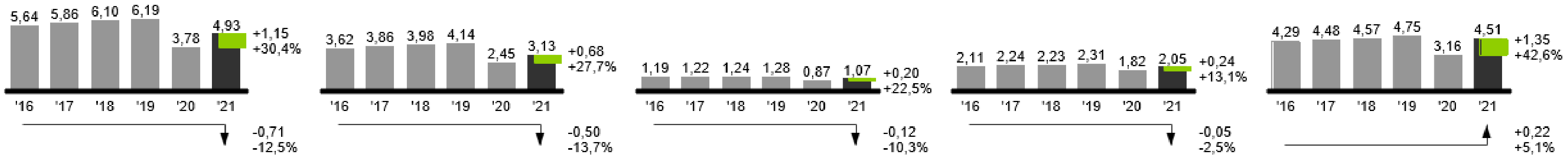
Overnight stays & arrivals in millions and %, change from previous year and 5-year comparison summer 2016 - 2021

Tyrol | Salzburg | Vorarlberg | Carinthia | South Tyrol

Overnight stays



Arrivals



Selected competitors summer

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

Comparison of the most important competitors

Winter season 2020/21:

- Due to the Corona measures, there were hardly any overnight stays or guest arrivals in the winter of 2020/21 across all regions compared to a normal season.
- Area-wide declines of far more than -90% compared to the normal situation can be seen, due to this extreme situation the winter season 2020/21 can hardly be statistically evaluated

Summer season 2021:

- With 20.6 million overnight stays, South Tyrol has recovered the most from the crisis and is ahead of Tyrol (19.8 million); Salzburg with 11.8 million, Carinthia with 9.3 million and Vorarlberg with just under 3.9 million follow behind.
- After the crisis summer of 2020, the high willingness to travel in summer ensures a recovery in large parts of over +20%, in South Tyrol even +40.5%; only in Carinthia, which had less severe declines last summer, the recovery is in the single digits with 8.4%
- Tyrol is ahead of South Tyrol in arrivals with 4.9 million, followed by Salzburg with 3.1 million, Carinthia with 2.1 million and Vorarlberg with 1.1 million arrivals; the recovery in arrivals in summer 2021 is equally strong (+13.1% to +42.6%)

Source: Office of the Tyrol State Government, Regional Development -Statistics; TourMIS/StatistikAustria; AutonomeProvinz Bozen –Südtirol, Landesinstitut für Statistik (Astat).

Foto: Mario Webhofer

Economic importance of tourism in Tyrol

Employment

- Tyrolean tourism employs about 54,000 people (salaried employees; no full-time equivalents)
- The district of Landeck (33%) is clearly characterized by tourism
- Tourism is also an important employer in Schwaz (21%), Reutte (24%) and Imst (21%)
- On average, the share of employees in tourism in Tyrol amounts to 13%, but compared to the previous year, declining employment figures in the tourism and leisure industry sector can be observed in all districts

Tourism and leisure industry	**Anteil**
Hotels	58%
Gastronomy	26%
Health industry	10%
Leisure and sports industry	4%
Travel agencies	2%
Cinema, culture and amusement	0.4%
Total	**100%**

Source: Tyrol Economic Chamber 2021

Foto: Philipp Reiter

Expenditure and turnover

Daily expenditure of guests (excl. arrival)

- Daily expenses per person/day in winter: € 185,-.
- Daily expenditure per person/day in summer: € 147,-.
  - 56% accommodation
  - 14% food and beverages (without supermarket and accommodation)
  - 19% in Winter or 8% in Summer for cable cars and local transportation
  - 10% shopping
  - 6% leisure, culture, sports and wellness
  - The rest is for other expenses
- Expenditure thus significantly higher in winter than in summer

Source: T-Mona Winter 2018/19 and Summer 2021

Revenue and value creation

Winter season 2020/21	
Overnight tourism revenues	126.151.498 €
Day tourism revenues (percentage of TSA 2013/14 - approx. 21.2%)	14.494.807 €
Total touristic winter revenues	140.646.305 €
Estimate of gross value added winter season 2020/21 (at net prices)	**84.247.137 €**
Change in % compared to winter season 2019/20	-97%

Summer season 2021	
Overnight tourism revenues	2.599.198.662 €
Day tourism revenues (percentage of TSA 2013/14 - approx. 38%)	384.161.562 €
Total touristic summer revenues	2.983.360.224 €
Estimate of gross value added summer season 2021 (at net prices)	**1.787.032.774 €**
Change in % compared to summer season 2020	31,5%

Background information: *This is an extrapolation of gross value added on a seasonal basis, building on the comprehensive calculation of the Tourism Satellite Account for Tyrol. However, the sum of both seasons cannot be compared with the total result of sales and gross value added from the satellite account, as certain data and information had to be left out for the seasonal extrapolations.*

Source: Calculations of MCI Tourismus, Basis: Tourism-Satellite-Account Tyrol 2014 & 2018

Foto: TVB Osttirol / Tonalia / Troyer

Value creation

- Direct tourism gross value added in Tyrol amounts to about € 4.99 billion
- This is 14.3% of the total gross value added in the Tyrol
- For Austria, the direct value added effects of tourism amounted to € 21.69 billion, which corresponds to a 5.5% share of total value added (GDP)
- In comparison, the share in Upper Austria is 2.0% and Vienna 3.7%

Source: Tourism-Satellite-Account Tyrol 2018, WIFO & Statistics Austria


Foto: Roman Huber

Tyrol-Vacationists during Winter & Summer

Tyrol-Vacationists in Winter & Summer

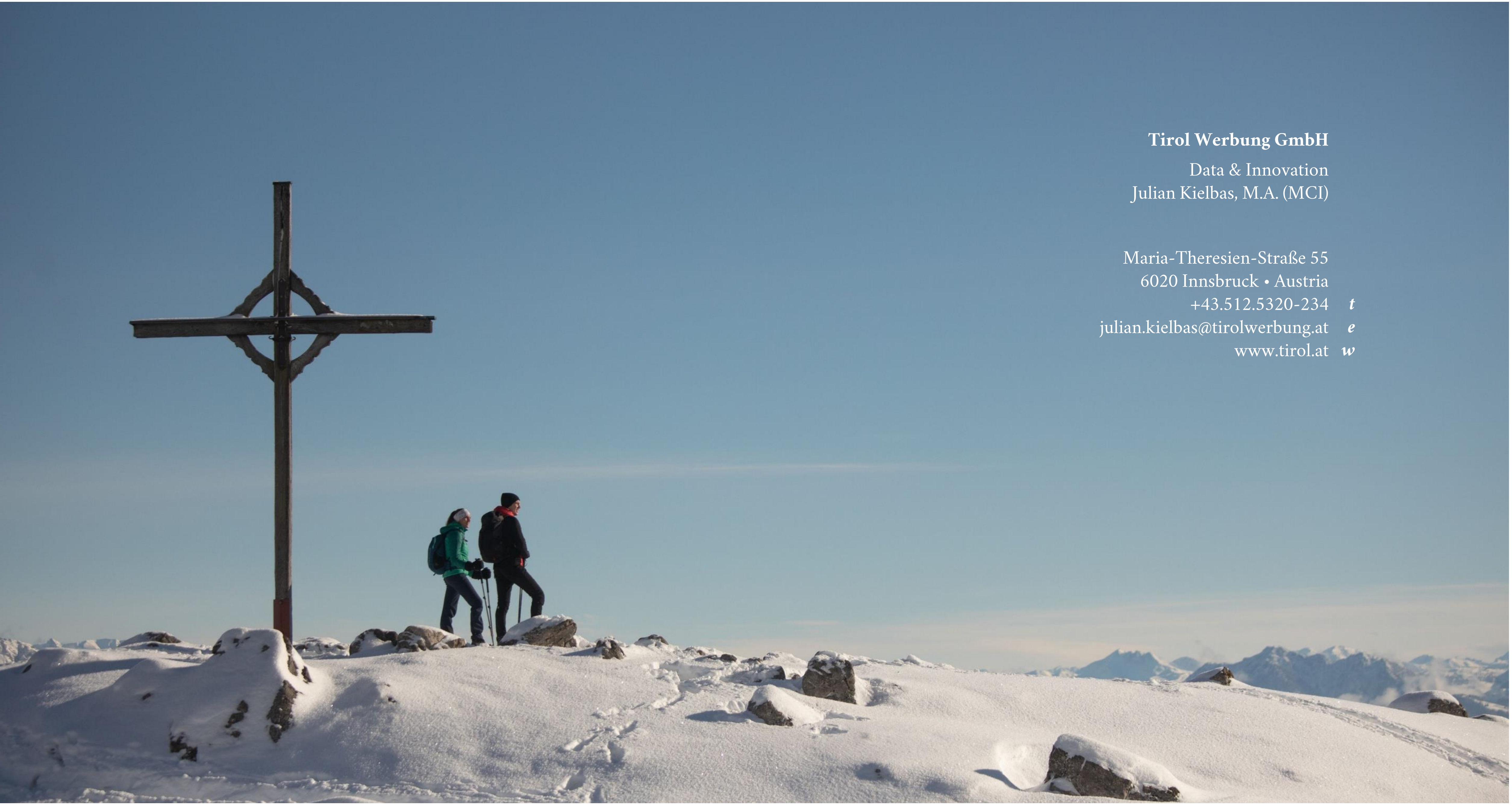
Winter		Summer
Ø years old 52% with university degree 49% with more than 4,000 € monthly household net income 74% regular guests	**WHO** are they?	Ø 49,6 years old 39% with university degree 45% with more than 4,000 € monthly household net income 63% regular guests
As family with kids / teens (32%) As couples (25%) With friends (16%)	**WITH WHOM** do they travel?	As couples (41%) As family with kids / teens (32%) With friends (9%)
Car (83%) Aircraft (7%) Train (6%)	**HOW** do they travel to Tyrol?	Car (89%) Camper van / trailer (4%) Train (5%)

Source: T-Mona Winter 2018/19 and Summer 2021

Activities of Tyrol-Vacationists

Winter		Sommer
Skiing (80%) Swimming (24%) Winter hiking (35%) Sledging (15%) Snowboarding (14%)	**WHICH** sports do they practise? (Top 5)	Hiking (90%) Swimming (46%) Cycling/MTB/E-Bike (33%) Mountaineering (20%) Jogging/Running (7%)
Going out for food, outside the accomodation (46%) Relaxing / doing nothing (34%) Going for a walk / strolling (39%) Enjoying typical regional food / drinks (33%) Après Ski (40%)	**WHAT** else do they do during vacation? (Top 5)	Going for a walk / strolling (57%) Going out for food, outside the accomodation (51%) Going sightseeing (39%) Excursions (40%) Enjoying typical regional food / drinks (39%)

Source: T-Mona Winter 2018/19 and Summer 2021



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