

# FACTS AND FIGURES ON TOURISM IN TIROL

*Tourism in Tirol has a long history. Until the late 19th century, most visitors were traders and travellers on the important north-south and east-west transit routes passing through the region. From the early 20th century, Tirol became increasingly popular as a holiday destination in its own right.*

## **Tirol as a holiday destination**

Tourism is an essential part of Tirol's economy. Almost 25,000 local businesses rely on tourism. With around 50,000 employees, the tourism sector is not only important as a creator of jobs but also drives other fields such as crafts and trade.

## **Upswing in tourism**

The earliest visitors to Tirol, who arrived more than 200 years ago, were members of the ruling elite embarking on elaborate journeys to educate themselves and broaden their horizons. From the middle of the 19th century, more and more people found themselves drawn to the mountains during the hot months of the year to cool off. Alongside summer tourism, mountaineering soon became the second mainstay of tourism in the region. It was not until the early 20th century that winter tourism began to develop.

Tourism in Tirol took off in earnest after the Second World War. This enabled even peripheral regions such as the valleys to enjoy economic development and prosperity. Until the mid-1990s, summer was the more important of the seasons – and in 1991 it brought Tirol its best result to date with just over 23 million overnight stays.

In 2018/19, the last full tourism year before the Coronavirus pandemic, 27.5 million overnight stays were recorded in winter compared with 22.2 million overnight stays in summer, representing a ratio of 55:45 per cent.

## **Tourism year 2022/23**

The balance sheet for the **2022/23 tourism year** (from 1st November 2022 to 31st October 2023) shows a significant increase compared to the previous year, as the winter season in the 2021/22 tourism year was still adversely affected by coronavirus restrictions. As a result, **arrivals** increased by 15.4 per cent to **12.1 million** and **overnight stays** by 11.8 per cent to

**48.5 million.** It is therefore also worth comparing this figure with the 2018/19 tourism year (before coronavirus). Using this as a basis, the 2022/23 tourism year is 2.5 per cent lower in terms of arrivals and 2.4 per cent lower in terms of overnight stays. The average **length of stay** for Tirolean guests over the entire 2022/23 tourism year was **4.0** days, which is consistent with the previous year.

The **2022/23 winter season** was the first without coronavirus-related restrictions since winter 2018/19. For this reason, a comparison with the pre-crisis level of 2018/19 is also recommended for winter 2022/23. After the sharp declines during the pandemic, figures have recovered significantly and are only slightly below pre-coronavirus levels: **25.7 million overnight stays** in the 2022/23 winter season represent a drop of 6.5 per cent compared to winter 2018/19. At 5.8 million, **guest arrivals** are still 7.3 per cent below the pre-pandemic level. And according to a calculation by MCI Tourismus, the **regional value creation** of 3.5 billion euros, adjusted for inflation, comes within six per cent of the figure from the 2018/19 winter season. At **4.5 days**, the average **length of stay** in winter 2022/23 was up 0.8 per cent on the pre-crisis level.

Despite challenging conditions - in particular massive inflation rates - the **2023 summer season** closed with a year-on-year increase in both arrivals and overnight stays: **6.3 million guest arrivals** in the period from May to October 2023 represent an increase of 5.1 per cent. **Overnight stays** increased by 1.5 per cent to **22.8 million**. The average **length of stay** dropped slightly to **3.6 days** (minus 0.1 day). In terms of overnight stays, the 2023 summer season was the strongest since the summer of 1991, despite a significant decline in the number of beds from 371,000 to 328,000 over the past 30 years. **Value creation** grew by 1.9 per cent year-on-year to **2.4 billion euros**.

### Facts

- The number of overnight stays increased in the **2022/23 tourism year** (1st November 2022 to 31 October 2023) compared to the 2021/22 tourism year: **48.5 million overnight stays** represent a year-on-year rise of 11.8 per cent. This significant increase compared to the previous year is partly due to the winter season in the 2021/22 tourism year, which was still affected by coronavirus restrictions.
- At **12.1 million**, **guest arrivals** also increased by 15.4 per cent compared to the previous year.
- The **average length of stay** for Tirolean guests in the 2022/23 tourism year was **4.0 days**, which is the same as that of the previous year.
- **Germany** remains the number one source market, accounting for around **54 per cent** of total overnight stays. This is followed by the Netherlands with 11 per cent and Austria with a share of 8 per cent of total overnight stays. Switzerland ranks fourth with a share of 5 per cent, followed by Belgium with around 3 per cent.

*Sources: Provincial statistics Tirol, WIFO & Statistics Austria, Management Center Innsbruck*

### The role of Tirol Werbung in the region's tourism industry

Tirol Werbung is Tirol's regional tourism board. Its mission is to boost the desirability of Tirol as a tourist destination. In doing so, the company focuses on clearly defined target

groups – both holiday guests and business travellers. The key objectives comprise of the following areas of activity:

- Inspirational communication that assures potential guests of a relaxing and eventful stay in the heart of the Alps
- Brand management within a tourism context in order to increase the desirability of Tirol as a tourist destination in a target-oriented manner
- Recognising trends and proactively addressing superordinate challenges, as well as developing collaborative, future-oriented solutions with partners
- Co-operation with interested partners to attract potential guests

### **A subsidiary of Lebensraum Tirol Holding**

Since 1 January 2019, Tirol Werbung has been part of Lebensraum Tirol Holding, which also includes Standortagentur Tirol and Agrarmarketing Tirol. These three subsidiaries are 100 per cent owned by Lebensraum Tirol Holding. Strategic control of the Tirol brand is also carried out by Lebensraum Tirol Holding.

### **Tirol's tourism strategy**

Tirol's tourism strategy is set out in the „[Tirolean Way 2021](#)“. This strategy paper is based on four core drivers from which fields of action and measures are derived:

- Tirol is a place where people both live and spend their holidays
- Tirol's tourism industry is family-based and cross-generational
- Tirol is a recognised for its leadership expertise in alpine tourism
- Sustainability and regional focus

### **Tirol Tourism Research**

[Tirol Tourism Research \(TTR\)](#) – the central knowledge hub for tourism in Tirol – offers up-to-date and detailed statistics. With this online platform, Tirol Werbung and MCI Tourism offer direct access to a wealth of information and data.

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